myCalPERS Employer Reports (Cognos)

Student Guide

March 2, 2024

CalPERS

myCalPERS Employer Reports (Cognos)

myCalPERS generates reports using IBM Cognos software. Cognos queries your agency's data in myCalPERS and generates predefined reports with your chosen criteria in different formats.

Disclaimer

As a security safeguard, business partner and participant information has been masked within the figures in this procedure guide.

System Access

Your myCalPERS access roles determine which report you can run. If you are unable to run a report, contact your agency's system access administrator to update your myCalPERS access.

Training Opportunities

Prior to taking a myCalPERS training, new users should review the [Introduction to myCalPERS for Business Partners (PDF)](#) student guide.

Contents

myCalPERS Employer Reports Resources

myCalPERS Employer Reports (Cognos) Catalog

The [myCalPERS Employer Reports (Cognos) Catalog](#) provides a list of available reports, along with a sample, description, and user role needed to generate each report.

You can also filter reports by one of the following report types:

- Benefits
- Contributions
- Enrollments
- Financials
- Health
- Payroll
- Retirement Contracts
- Retirement Enrollments
- System Access Administration

Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > myCalPERS Employer Reports (Cognos) Catalog

Internet Browsers & Configuration

The [IBM Cognos Analytics](#) page provides a complete list of internet browsers that support IBM Cognos Analytics, including the version and additional information.

Pathway: IBM Cognos Analytics website > Supported Software tab > Web Browsers section (bottom of page)

IBM Cognos Analytics uses default browser configurations, but additional setting configurations may be required. Visit the [IBM Browser Settings](#) page for details.

Pathway: IBM Cognos Analytics website > Search: browser requirements > Version: 11.0

myCalPERS System Access Administration Student Guide

The [myCalPERS System Access Administration (PDF)](#) student guide provides your system access administrator(s) the steps to maintain your agency's system access necessary to run reports.

Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > System Access Administrators > myCalPERS System Access Administration (PDF)
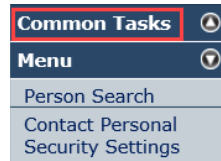
Scenario 1: Manage My Content

Within the My content folder, you will add folders and sub-folders, and rename and delete folders and reports.
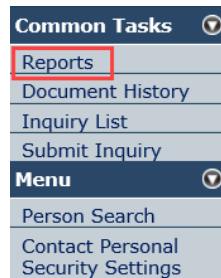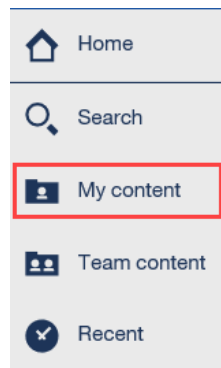
Step Actions

Add Folder

Step 1	From the homepage, select **Common Tasks** from the left-side navigation.

Step 2	Select the **Reports** left-side navigation link.

Step 3	From the left-side navigation, select the **My content** folder.

Step 4	Select the **New folder** icon.

Step 5	Select the **Folder** button.
Step 6	Enter a name for your folder.
Step 7	Press the **Enter** key on your keyboard.

Add Sub Folder

Step 8	From the My content folder, open the folder where you will add a sub-folder.
Step 9	Repeat steps 4-7.

Delete

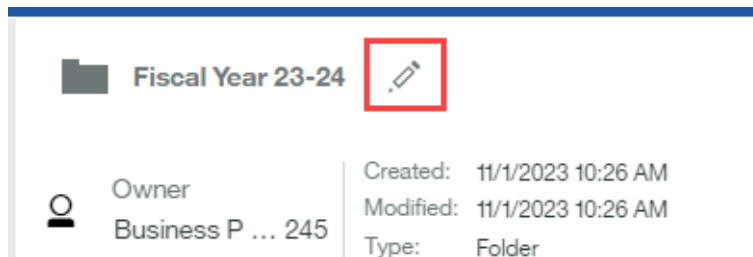|	
Step 10	From the My content folder, select the **More** icon next to the item.
Step 11	Select **Delete**.
Step 12	Select the **OK** button.
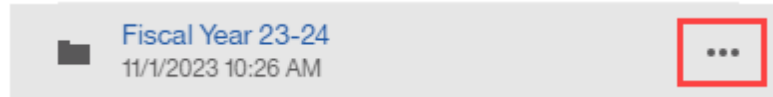
Rename

Step 13	From the My content folder, select the **More** icon next to the item.
Step 14	Select **Properties**.
Step 15	Select the Edit (pencil) icon.
Step 16	Update the name of the item. **You have completed this scenario.**

Scenario 2: Run Reports

You will run a report, change the format, save, and then locate the saved report.

System Logic

To re-run a report within the same session, update the report criteria (see scenario 3).

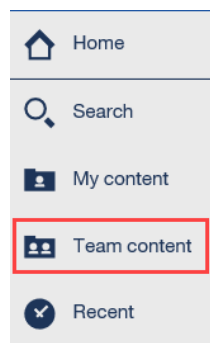## Step Actions

Run Report

Step 1   From the homepage, select **Common Tasks** from the left-side navigation.
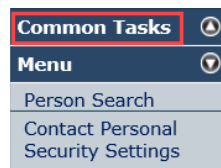
Step 2   Select **Reports**.
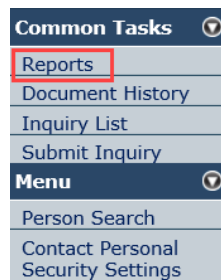
Step 3   From the left-side navigation, select the **Team content** folder.

Step 4   Select the **PSR_REPORTS_ENV98** link.

Step 5   Select the report name link.

Step 6	Complete the report criteria.
Step 7	Select the **Finish** button.

Change Report Format

Step 8	Do you want to display the report in a different format? **Yes:** Continue to step 9 **No:** Skip to step 11
Step 9	Select the **Run as** icon in the top left corner of the page.
Step 10	Select a format. Run HTML Run PDF Run Excel Run Excel data Run CSV Run XML

Save Report

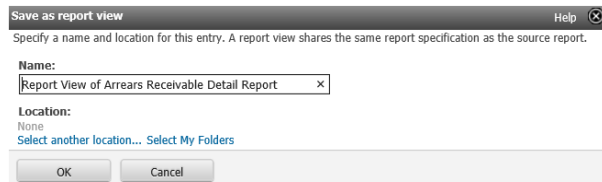| Step 11	Do you want to save the report? **Yes**: Continue to step 12 **No**: You have completed this scenario
Step 12	Select the **Add this report** icon in the top left corner of the page.
Step 13	Select **Save this report as report view…**.
Step 14	If desired, rename the report.
Step 15	Choose the **Select My Folders** link.

Step 16	Select the **OK** button.

Locate Saved Report

Step 17	From the left-side navigation, select the **My content** folder.
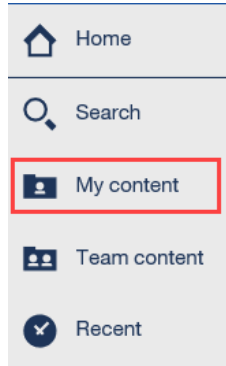
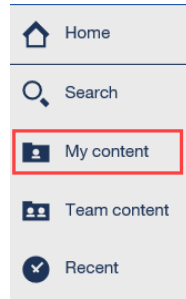| Step 18	Select the link for the saved report to display it.
	You have completed this scenario.

Scenario 3: Update Report Criteria

You will update the criteria of a report that is saved in your My content folder.

Step Actions

Step 1   From the left-side navigation, select the **My content** folder.

Step 2   Select the link for the saved report.

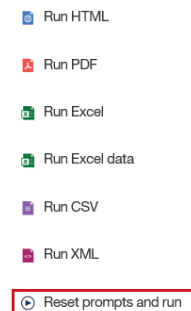Step 3   Select the **Run as** icon in the top left corner of the page.

Step 4   Did the criteria page display?

Yes: Skip to step 6.

No: Continue to step 5.

Step 5   If the criteria page doesn't display, select **Reset prompts and run**.

Step 6   Complete the report criteria.

Step 7   Select the **Finish** button.

You have completed this scenario.

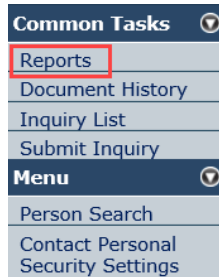# Scenario 4: Run Reports in Different Formats

You will run a report in a format other than HTML (default).

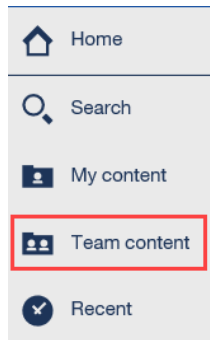## Step Actions

Step 1   From the homepage, select **Common Tasks** from the left-side navigation.
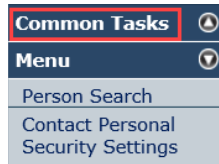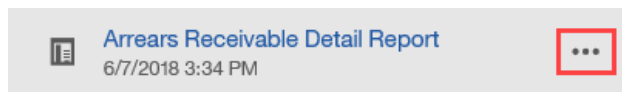

Step 2   Select **Reports**.

Step 3   From the left-side navigation, select the **Team content** folder.

Step 4   Select the **PSR_REPORTS_ENV98** link.

Step 5   Select the **More** icon for the report.

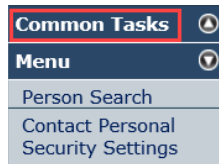| Step 6	Select **Run as**.
Step 7	Select a report format.
Step 8	Select the **Run** button.
Step 9	Complete the report criteria.
Step 10	Select the **Finish** button.
	You have completed this scenario.

Scenario 5: Create Report View (Shortcut)

You will create a shortcut to run a report.
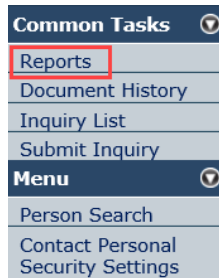
System Logic

Do not use the Create Shortcut option as it may stop functioning over time.

Step Actions

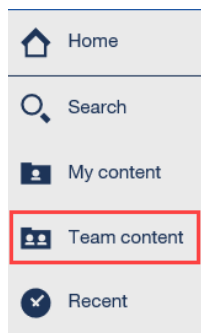Step 1   From the homepage, select **Common Tasks** from the left-side navigation.

Step 2   Select **Reports**.

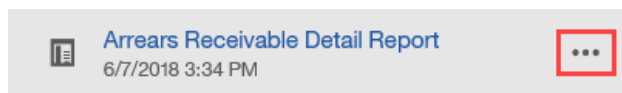Step 3   From the left-side navigation, select the **Team content** folder

Step 4   Select the **PSR_REPORTS_ENV98** link.

Step 5   Select the **More** icon for the report.

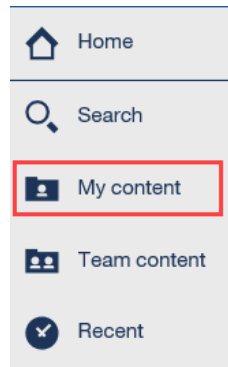Step 6   Select **Create report view**.

Step 7	Select a location to save the report.
Step 8	If desired, rename the report by using the **Save as** field.
Step 9	Select the **Save** button.

Locate and Run Saved Report

Step 10	From the left-side navigation, select **My content**.

| Step 12	Select the link for the saved report.
Step 13	Complete the report criteria.
Step 14	Select the **Finish** button.
	You have completed this scenario.

Scenario 6: Run in the Background

Large reports may take additional time to run. You will run a report in the background, allowing you to use Cognos while the report is generated.
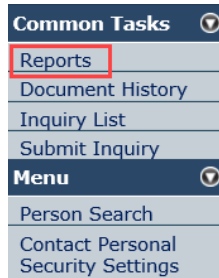
Step Actions

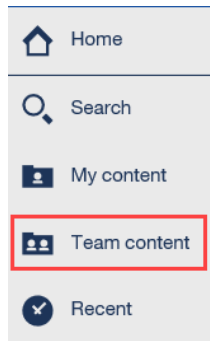## Locate Report

Step 1   From the homepage, select **Common Tasks** from the left-side navigation.
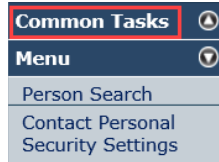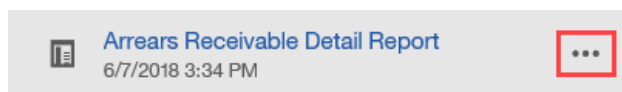

Step 2   Select **Reports**.

Step 3   From the left-side navigation, select the **Team content** folder.

Step 4   Select the **PSR_REPORTS_ENV98** link.

Step 5   Select the **More** icon for the report.

Step 6   Select **Run as**.

Step 7   Turn on **Run in the background**.

Step 8   Select **Advanced** to expand the section.

Step 9 Select the **Classic view** link.

Step 10   Within the Run with options section, select the **advanced options** link.

Step 11   Within the Time and mode sub-section, select the **Run in the background** radio button.

Step 12   Select either the **Now** or **Later** radio button.

Step 13   If you selected the **Later** radio button, enter a date and time for the report to run.

Step 14   Within the Formats sub-section, select the check boxes for the format(s).

Note: There may be additional features available within each available format.

Step 15   Within the Delivery sub-section, select the **Edit the save options…** link.

Note: Do not change the delivery method to print or email.

Step 16	Within the Save as report view section, enter your report name.

Step 17	Select the **OK** button.
Step 18	Select the **Run** button.

Report Criteria

Step 19	Enter the criteria for the report.
Step 20	Select the **Finish** button.
Step 21	Select the **OK** button.

Locate Generated Report

Step 22	From the left-side navigation, select the **My content** folder.
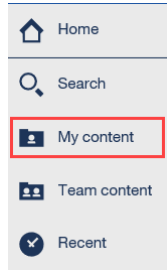
Step 23	Did you select more than one format?
	Yes: Continue to step 24
	No: Select the report link. **You have completed this scenario.**
Step 24	Select the **More** icon for the report.
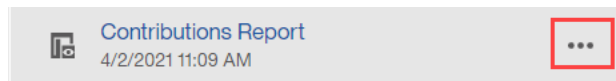
Step 25	Select **View versions**.

Step 26	Select the **Date** link.

Step 27	Select the **Format** icon you wish to display.

You have completed this scenario.

Scenario 7: Schedule Reports

You will run a report and save it within your My content folder. From there you will:

- Set a recurring schedule
- View versions
- Update schedule
- Delete schedule

System Logic

- To set a schedule for a report, it must first be run and saved within the My content folder.
- Only one schedule can be associated with each entry.
- All schedules must have an end date to properly run.

Step Actions

Run

Step 1   From the homepage, select **Common Tasks** from the left-side navigation.
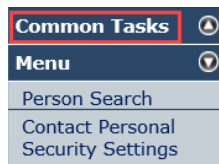
Step 2   Select **Reports**.

Step 3   From the left-side navigation, select the **Team content** folder.
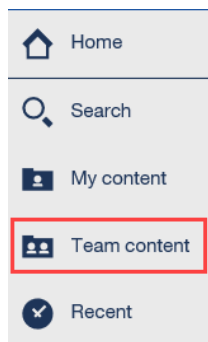
Step 4   Select the **PSR_REPORTS_ENV98** link.

Step 5	Select the report link.
Step 6	Complete the report criteria.
Step 7	Select the **Finish** button.

Save

Step 8	Select the **Add this report** icon in the top left corner of the page.

Step 9	Select **Save this report as report view….**.
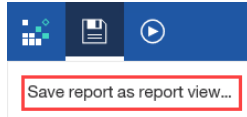
Step 10	If desired, rename the report.

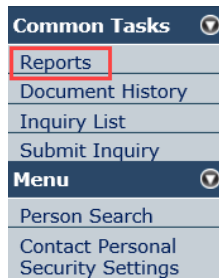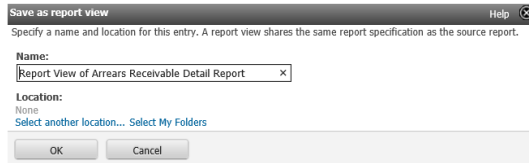| Step 11	Select the **Select My Folders** link.
Step 12	Select the **OK** button.

Set Schedule

Step 13	From the left-side navigation, select **My content**.
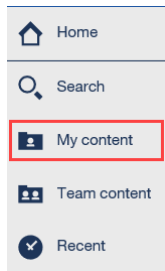
Step 14	Select the **More** icon for the saved report.

Step 15	Select **Properties**.

Step 16	Select the **Schedule** tab.
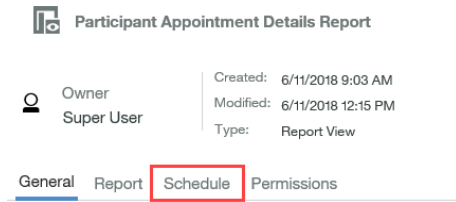
Step 17	Select the **New** icon.
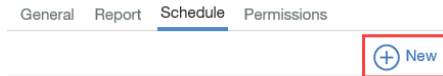
Step 18	Create your schedule.
Step 19	Confirm the schedule has an end date. **Note:** Do not select the **No end date** check box.
Step 20	Under Options, confirm that the Delivery method is Save and the correct prompts (criteria) are selected/entered.
Step 21	Select the **Create** button.

View Versions

Step 22	From the left-side navigation, select **My content**.
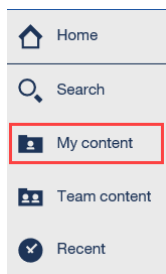
Step 23	Select the **More** icon for the saved report.

Step 24	Select **View versions**.
Step 25	Under the **Versions** tab, select the blue date link.

Update Schedule

Step 26   From the left-side navigation, select **My content**.

Step 27   Select the **More** icon for the saved report.

Arrears Receivable Detail Report
6/7/2018 3:34 PM

Step 28   Select **Properties**.

Step 29   Select the **Schedule** tab.

Participant Appointment Details Report

Owner
Super User

Created: 6/11/2018 9:03 AM
Modified: 6/11/2018 12:15 PM
Type: Report View

General   Report   Schedule   Permissions
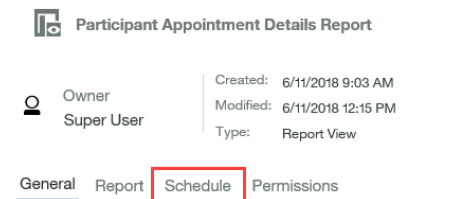
Step 30   Select the right arrow for the schedule.

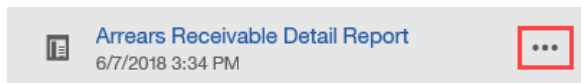Step 31   Update the schedule.

Step 32   Select the **Update** button.

Delete Schedule

Step 33   From the left-side navigation, select **My content**.

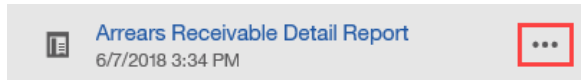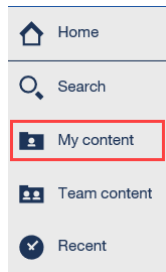Step 34   Select the **More** icon for the saved report.

Arrears Receivable Detail Report
6/7/2018 3:34 PM   ...
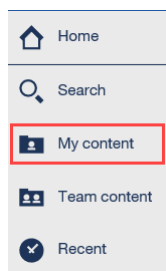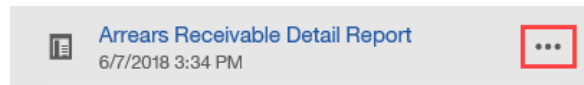
Step 35   Select **Properties**.

Step 36   Select the **Schedule** tab.

Participant Appointment Details Report

Owner   Created: 6/11/2018 9:03 AM
Super User   Modified: 6/11/2018 12:15 PM
                      Type: Report View

General   Report   Schedule   Permissions
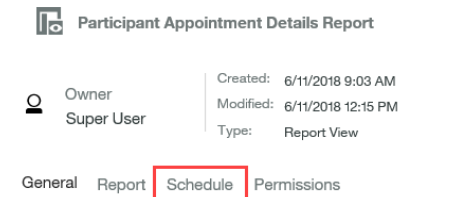
Step 37   Select the **Delete** button.

Step 38   Select the **OK** button.

               You have completed this scenario.

CalPERS Resources

Obtain more information by visiting the [CalPERS website](#) at www.calpers.ca.gov.

- [myCalPERS Student Guides & Resources](#)
  Pathway: CalPERS website > Employers > I Want To…: Find myCalPERS Student Guides
- [Business Rules & myCalPERS Classes](#)
  Pathway: CalPERS website > Employers > I Want To… : Attend Training & Events > Business Rules & myCalPERS Classes
- [myCalPERS Technical Requirements](#)
  Pathway: CalPERS website > Employers > myCalPERS Technical Requirements
- [System Access Administrators](#)
  Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > System Access Administrators

CalPERS Contacts

Email

- To contact [employer educators](#) for questions and requests, email **calpers_employer_communications@calpers.ca.gov**.
- To contact the [Employer Response Team](#) for assistance with your most critical, complex, or time-sensitive issues, email **ert@calpers.ca.gov**.

Phone or Fax

You can reach CalPERS at **888 CalPERS** (or **888**-225-7377), Monday through Friday, 8:00 a.m. to 5:00 p.m., except on state holidays.

- TTY: (877) 249-7442 (This number does not accept voice calls)
- CalPERS centralized fax number: (800) 959-6545
- Employer Response Team phone number: (800) 253-4594

Submit Inquiry

You can send secure messages through myCalPERS. Expand the **Common Tasks** left-side navigation folder and select the **Submit Inquiry** link to submit a question or request.

Report Requests

In the event a Cognos report does not provide the information you need, you may request a custom report. Allow 6-10 weeks to fulfill each request. Additional paperwork and approval may be required for each request.

- For payroll or retirement reports, email [employer_technical_support@calpers.ca.gov](#).
- For health reports, email [hamd_data_services@calpers.ca.gov](#).