myCalPERS Employer Reports (Cognos)

Student Guide

January 21, 2023

CalPERS

myCalPERS Employer Reports (Cognos)

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

Disclaimer

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

System Access

If you are unable to view or process these scenarios, 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

Scenario 1: Run Reports

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

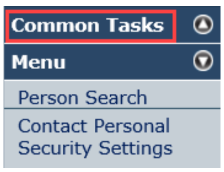
System Logic

If you want to re-run a report within the same session, you will need to update the report criteria (see scenario 2).

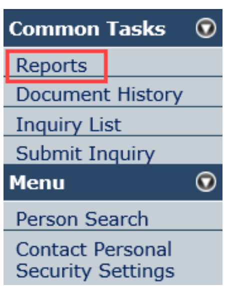
Step Actions

Run Report

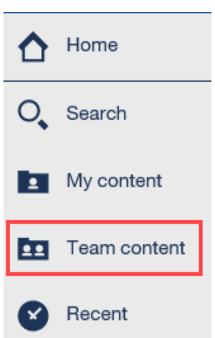
Step 1 From the home page, select **Common Tasks** from the left-side navigation.



Step 2 Select **Reports**.



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



Step 4 Select the **PSR_REPORTS_ENV98** link.

Step 5 Locate the report.

Step 6 Select the report link.

Step 7 Complete the report criteria.

Step 8 Select the **Finish** button.

Change Report Format

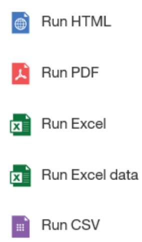
Step 9 Do you want to view the report in a different format?

Yes: Continue to step 10

No: Skip to step 12

Step 10 Select the **Run as** icon in the top left corner of the page.

Step 11 Select a format.



Save Report

Step 12 Do you want to save the report?

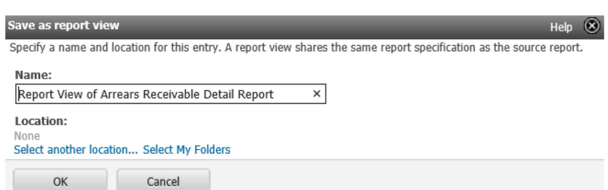
Yes: Continue to step 13

No: You have completed this scenario

Step 13 Select the **Add this report** icon in the top left corner of the page.

Step 14 Select **Save this report as report view….**

Step 15 If desired, rename the report.

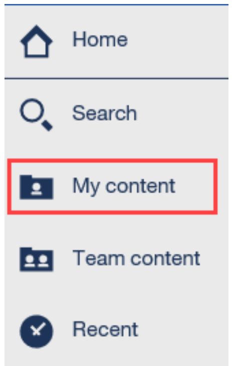


Step 16 Select the **Select My Folders** link.

Step 17 Select the **OK** button.

Locate Report

Step 18	From the left-side navigation, select **My content**.



Step 19	Locate the report.
Step 20	Select the report. **You have completed this scenario.**

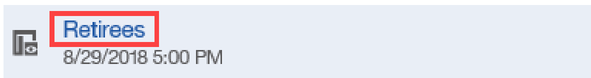
Scenario 2: Update Report Criteria

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

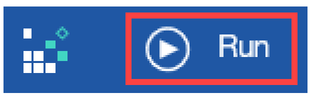
Step Actions

Step 1 Locate the report.

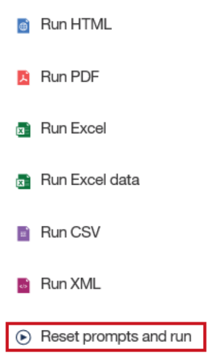
Step 2 Select the report link.



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



Step 4 If necessary, select **Reset prompts and run**.



Step 5 Complete the report criteria.

Step 6 Select the **Finish** button.

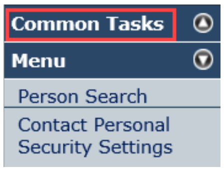
You have completed this scenario.

Scenario 3: Run Reports in Different Formats

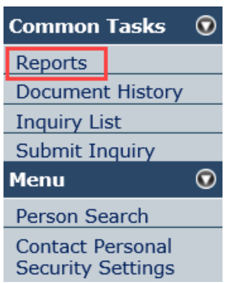
You will run a report in a format other than HTML (default).

Step Actions

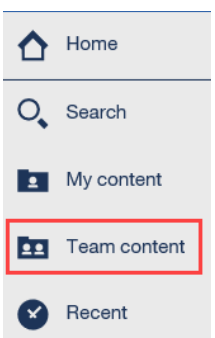
Step 1 From the home page, select **Common Tasks** from the left-side navigation.



Step 2 Select **Reports**.



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

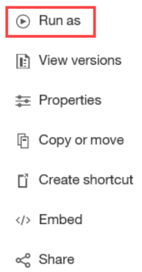


Step 4 Select the **PSR_REPORTS_ENV98** link.

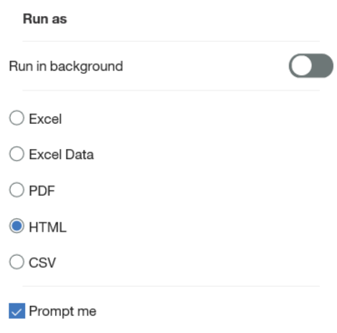
Step 5 Locate the report.

Step 6 Select the **More** icon for the report.

Step 7 Select **Run as**.



Step 8 Select a report format.



Step 9 Select the **Run** button.

Step 10 Complete the report criteria.

Step 11 Select the **Finish** button.

You have completed this scenario.

Scenario 4: Create Report View (Shortcut)

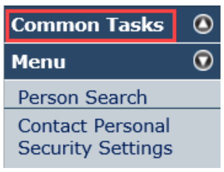
You will create a shortcut to run a report.

System Logic

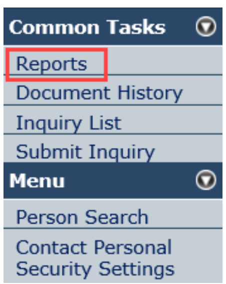
Do not use the Create Shortcut option as it may stop functioning over time.

Step Actions

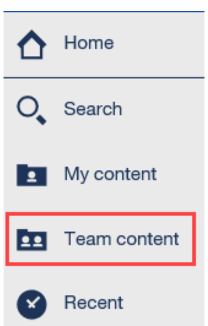
Step 1 From the home page, select **Common Tasks** from the left-side navigation.



Step 2 Select **Reports**.



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



Step 4 Select the **PSR_REPORTS_ENV98** link.

Step 5 Locate the report.

Step 6 Select the **More** icon for the report.

Step 7 Select **Create report view**.

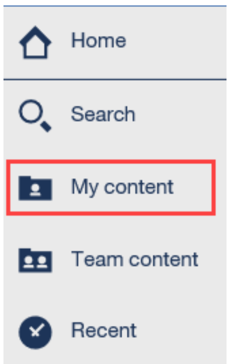
Step 8 Select a location to save the report.

Step 9 If desired, rename the report by using the **Save as** field.

Step 10 Select the **Save** button.

Locate and Run

Step 11 From the left-side navigation, select **My content**.



Step 12 Locate the report.

Step 13 Select the report link.

Step 14 Complete the report criteria.

Step 15 Select the **Finish** button.

You have completed this scenario.

Scenario 5: Run in the Background

Running a report in the background allows you to use Cognos while the report is generated.

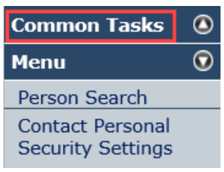
Scenario

You will run a report in the background of Cognos.

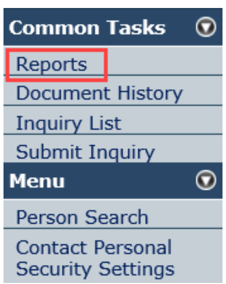
Step Actions

Locate Report

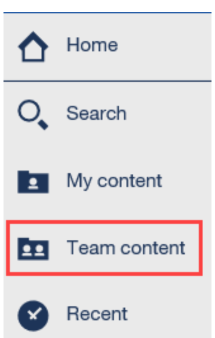
Step 1 From the home page, select **Common Tasks** from the left-side navigation.



Step 2 Select **Reports**.



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

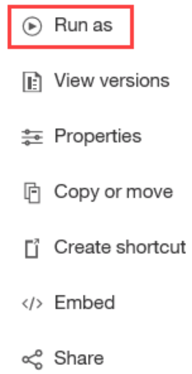


Step 4 Select the **PSR_REPORTS_ENV98** link.

Step 5 Locate the report.

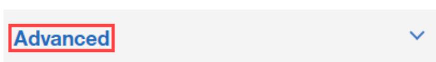
Step 6 Select the **More** icon for the report.

Step 7 Select **Run as**.

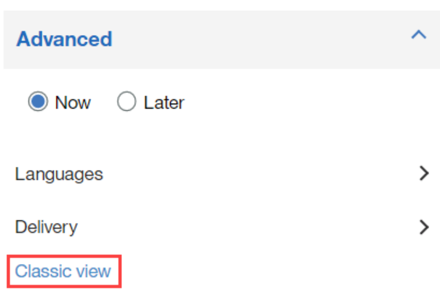


Step 8 Turn on **Run in the background**.

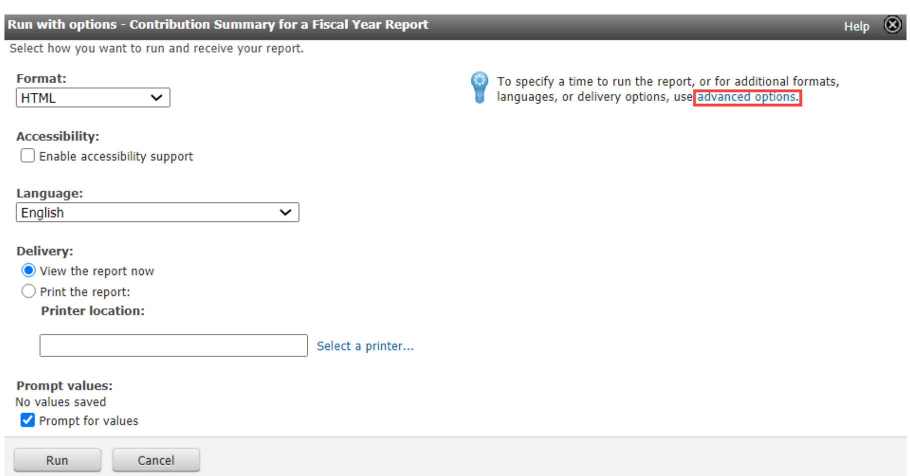
Step 9 Select **Advanced** to expand the section.



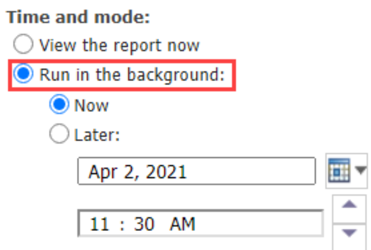
Step 10 Select the **Classic view** link.



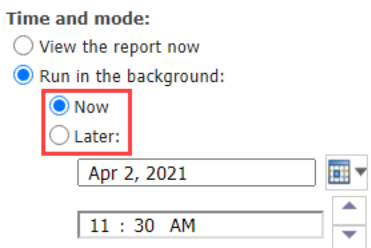
Step 11 Within the Run with options section, select the **advanced options** link.



Step 12 Within the Time and mode sub-section, select the **Run in the background** radio button.

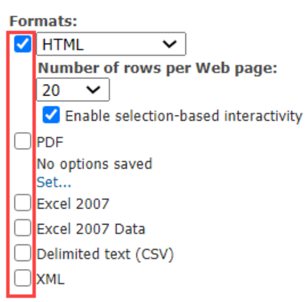


Step 13 Select either the **Now** or **Later** radio button.



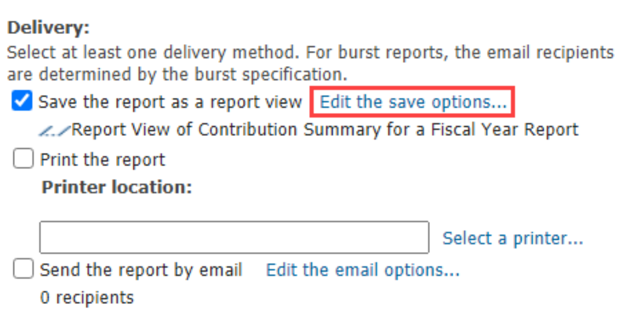
Step 14 If you selected the **Later** radio button, enter a date and time for the report to run.

Step 15 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 16 Within the Delivery sub-section, select the **Edit the save options...** link.



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

Step 17 Within the Save as report view section, enter your report name.

Step 18 Select the **OK** button.

Step 19 Select the **Run** button.

Report Criteria

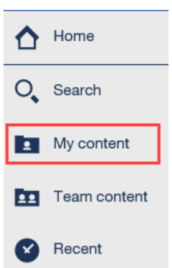
Step 20 Enter the criteria for the report.

Step 21 Select the **Finish** button.

Step 22 Select the **OK** button.

Locate Generated Report

Step 23 From the left-side navigation, select the **My content** folder.

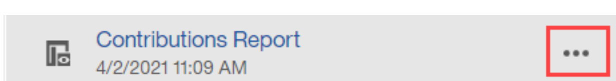


Step 24 Did you select more than one format?

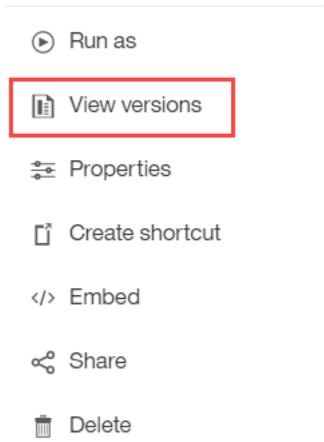
Yes: Continue to step 25

No: Select the report link. **You have completed this scenario.**

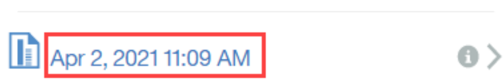
Step 25 Select the **More** icon for the report.



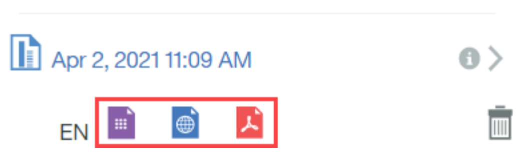
Step 26 Select **View versions**.



Step 27 Select the **Date** link.



Step 28 Select the **Format** icon you wish to view.



You have completed this scenario.

Scenario 6: 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

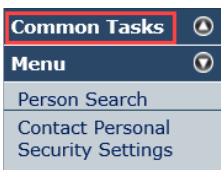
System Logic

- 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.

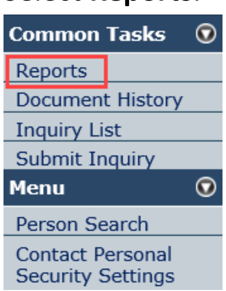
Step Actions

Run

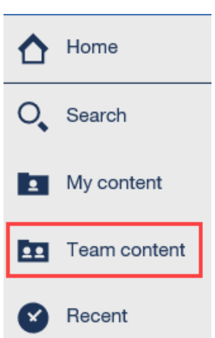
Step 1 From the home page, select **Common Tasks** from the left-side navigation.



Step 2 Select **Reports**.



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



Step 4 Select the **PSR_REPORTS_ENV98** link.

Step 5 Locate the report.

Step 6 Select the report link.

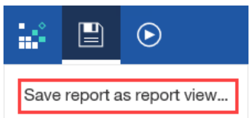
Step 7 Complete the report criteria.

Step 8 Select the **Finish** button.

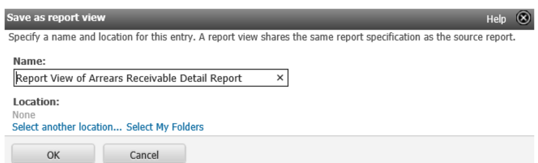
Save

Step 9 Select the **Add this report** icon in the top left corner of the page.

Step 10 Select **Save this report as report view…**.



Step 11 If desired, rename the report.

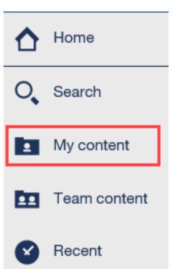


Step 12 Select the **Select My Folders** link.

Step 13 Select the **OK** button.

Set Schedule

Step 14 From the left-side navigation, select **My content**.

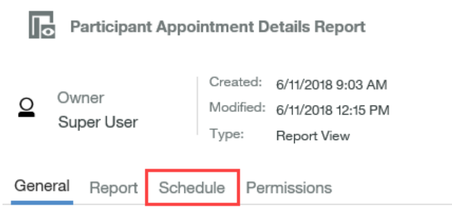


Step 15 Locate the report.

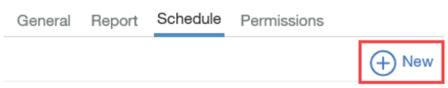
Step 16 Select the **More** icon for the report.

Step 17 Select **Properties**.

Step 18 Select the **Schedule** tab.



Step 19 Select the **New** icon.



Step 20 Create your schedule.

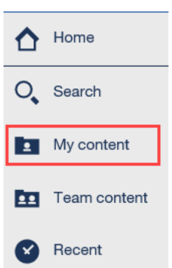
Step 21 Confirm the schedule has an End Date and the **No end date** check box is not selected.

Step 22 Under Options, confirm that the Delivery method is Save and the correct prompts (criteria) are selected/entered.

Step 23 Select the **Create** button.

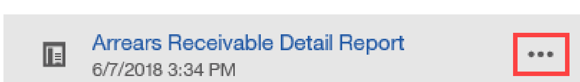
View Versions

Step 24 From the left-side navigation, select **My content**.



Step 25 Locate the report.

Step 26 Select the **More** icon for the report.

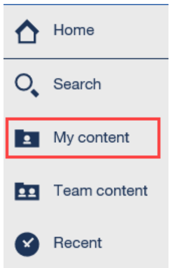


Step 27 Select **View versions**.

Step 28 Under the **Versions** tab, select the blue date link.

Update Schedule

Step 29 From the left-side navigation, select **My content**.

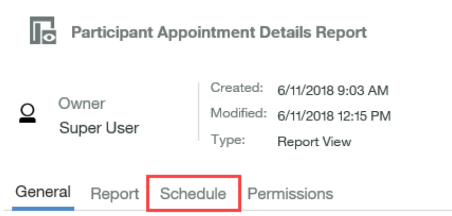


Step 30 Locate the report.

Step 31 Select the **More** icon for the report.

Step 32 Select **Properties**.

Step 33 Select the **Schedule** tab.



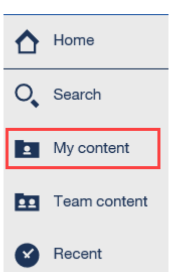
Step 34 Select the right arrow for the schedule.

Step 35 Update the schedule.

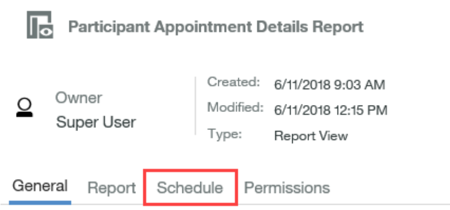
Step 36 Select the **Update** button.

Delete Schedule

Step 37 From the left-side navigation, select **My content**.



Step 38 Locate the report.

Step 39	Select the **More** icon for the report. 
Step 40	Select **Properties**.
Step 41	Select the **Schedule** tab. 
Step 42	Select the **Delete** button.
Step 43	Select the **OK** button. **You have completed this scenario.**

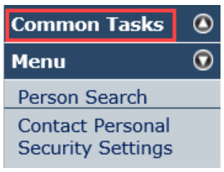
Scenario 7: Manage My Content

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

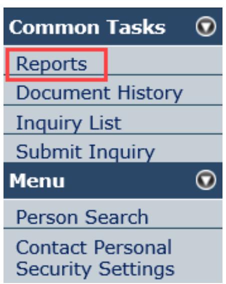
Step Actions

Add Folder

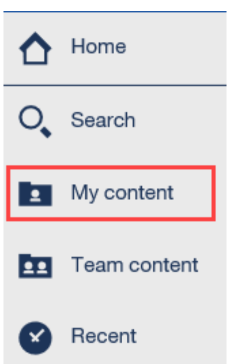
Step 1 From the home page, select **Common Tasks** from the left-side navigation.



Step 2 Select **Reports**.



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



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, locate the item you wish to delete.
Step 11	Select the **More** icon. 
Step 12	Select **Delete**.
Step 13	Select the **OK** button.

Rename

Step 14	From the **My content** folder, locate the item you wish to rename.
Step 15	Select the **More** icon for the item you wish to rename. 
Step 16	Select **Properties**.
Step 17	Select the pencil icon.
Step 18	Update the name of the item. **You have completed this scenario.**

myCalPERS Employer Reports Resources

myCalPERS Employer Reports (Cognos) Catalog

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

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

Report Formats

Cognos provides a variety of formats for generating reports. Not all formats listed below are available for all reports:

- HTML (default)
- Excel: Excel, Excel Data, CSV, and XML
- PDF

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 Brower Settings page for additional information.

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)

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.