

# my|CalPERS Employer Reports (Cognos)

Student Guide

**September 24, 2018**



# Employer Reports (Cognos)

my|CalPERS generates reports using IBM Cognos software. Cognos queries your agency's data in my|CalPERS and generates 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.

## Training Opportunities

Prior to taking a my|CalPERS System Training instructor-led class, new users should review the [Introduction to my|CalPERS for Business Partners](#) (PDF) guide.

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# Getting Started with Cognos

Before using Cognos it is important to understand the various areas of the software and the tools available to you.

## Home

Is the default page displayed when **Reports** is selected from the left-side navigation. It also displays a listing of your recently viewed reports.

## Search

The intuitive search allows you to search for a report without having to scroll through the list of reports. The search will begin displaying reports immediately that contain the keywords entered.

## My content

You can save, copy, and move reports to their **My content**. In addition, folders can be added to organize content. Items located within your **My content** are specific to the user.

## Team content

All available reports are located within **Team content**. You can access reports by selecting the **PSR\_Reports\_ENV98** folder. This is also where the **Saved Reports** folder is located.

## Recent

Displays a list of recently viewed reports allowing easy access to your post commonly used reports.

## Filter

The **Filter** icon is available within **Search**, **My content**, and **Team content** and can be used to filter the types of content displayed. The filter will remain in place for the remainder of your session.

## Sort

You can sort the information contained in **My content** and **Team content** by name or modified date. The selected sort will remain in place for the remainder of your session.

## Saved Reports Folder

This folder contains reports that are run on a monthly roll or batch process by CalPERS. The **Saved Reports** folder is located within the list of reports, in alphabetical order.

# Scenario 1: Run Reports

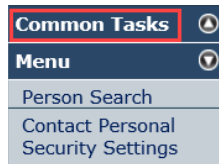
## System Logic

If you select a report to run within the same session it was previously run in, you will need to update the report criteria in order to re-run the report (see scenario 5).

## Step Actions

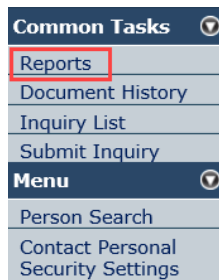
### Run Report

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



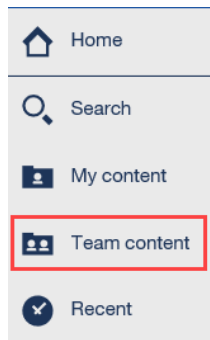
---

Step 2 Select **Reports**.



---

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



---

Step 4 Select **PSR REPORTS ENV98**.

---

Step 5 Locate the desired report.

---

Step 6 Select the report.

---

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?






If...	Then...
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 the desired format.

-  Run HTML
  -  Run PDF
  -  Run Excel
  -  Run Excel data
  -  Run CSV
- 

### Save Report

Step 12 Do you want to save the report?

If...	Then...
Yes	Continue to step 13
No	You have completed this scenario

---

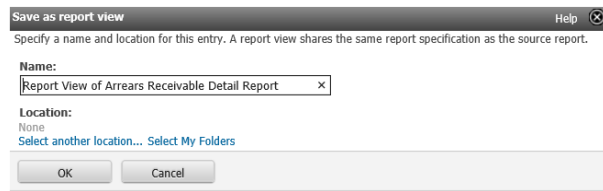
Step 13 Select the **Add this report** icon in the top left corner of the page.



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

---

Step 15 If desired, rename the report.



---

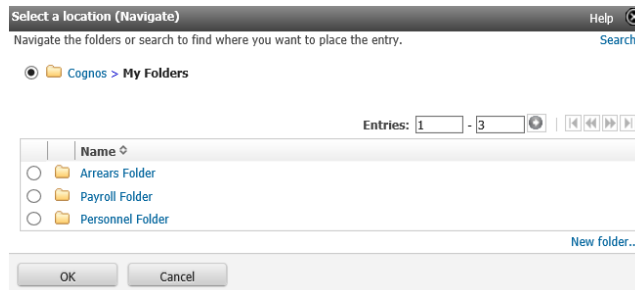
Step 16 Select the **Select My Folders** link.

---

Step 17 Select the **Select another location** link.

---

Step 18 To save within a specific folder, select the radio button for the desired folder.



---

Step 19 Select the **OK** button.

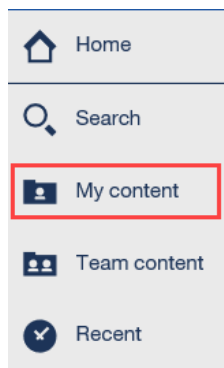
---

Step 20 Select the **OK** button.

---

## Locate Report

Step 21 From the left-side navigation, select **My content**.



---

Step 22 Locate the report.

---

Step 23 Select the report.

---

**You have completed this scenario.**

---

## Scenario 2: Update Report Criteria

### Scenario

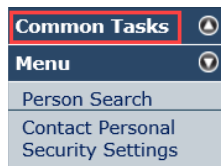
You will update the criteria of a report that is saved in **My content**.

### System Logic

- The criteria for the reports saved within **My content** can be updated at any time.
- When a report has a schedule, updating the criteria will update for all future schedules.

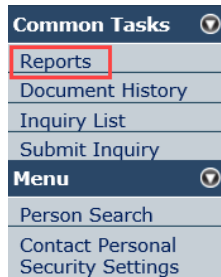
### Step Actions

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



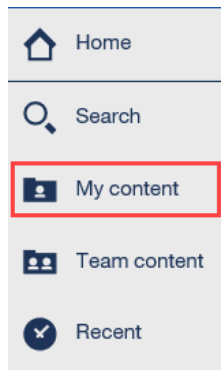
---

Step 2 Select **Reports**.



---

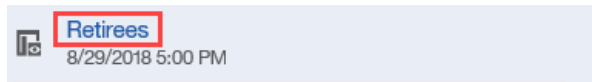
Step 3 From the left-side navigation, select **My content**.



Step 4 Locate the report.

---

Step 5 Select the report.



Step 6 Select the **Run as** icon in the top left corner of the page.



Step 7 Select the **Run as** icon again.

---

Step 8 Select **reset prompts and run**.

---

Step 7 Complete the report criteria.

---

Step 8 Select the **Finish** button.

**You have completed this scenario.**

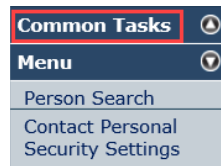
---



## Scenario 3: Run Reports in Different Formats

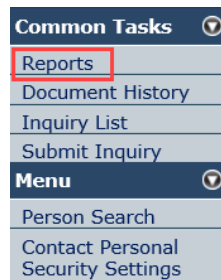
### Step Actions

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



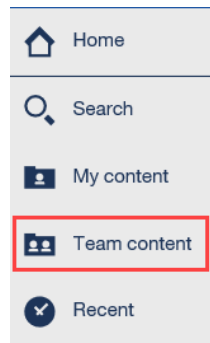
---

Step 2 Select **Reports**.



---

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



---

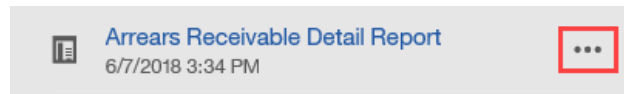
Step 4 Select **PSR REPORTS ENV98**.

---

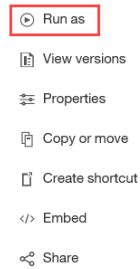
Step 5 Locate the desired report.

---

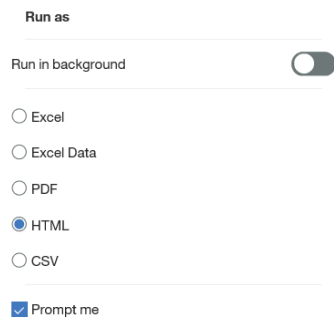
Step 6 Select the **More** icon for the desired report.



Step 7 Select **Run as**.



Step 8 Select the desired 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: Copy a Report

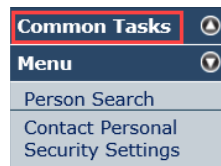
### System Logic

Copied reports will retain their original name. Once a report is copied to **My Content** it can be renamed.

### Step Actions

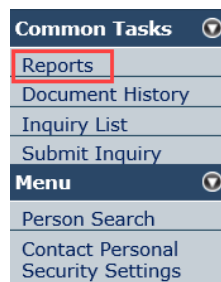
#### Copy

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



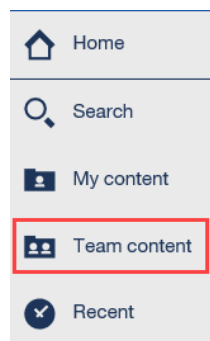
---

Step 2 Select **Reports**.



---

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



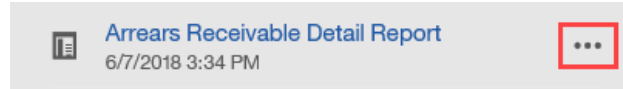
Step 4 Select **PSR REPORTS ENV98**.

---

Step 5 Locate the desired report.

---

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



Step 7 Select **Copy or move**.

---

Step 8 Select the desired location to save the report.

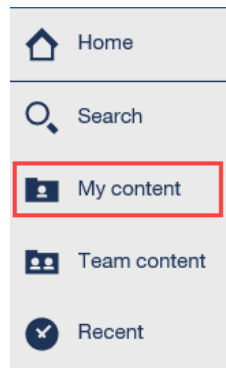
---

Step 9 Select the **Copy to** button.

---

### Locate and Run

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



Step 11 Locate the copied report.

---

Step 12 Select the report.

---

Step 13 Complete the report criteria.

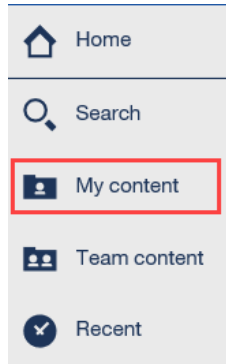
---

Step 14 Select the **Finish** button.

---

## Rename

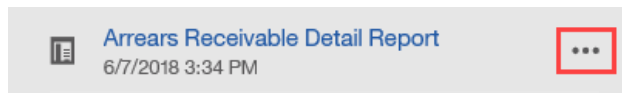
Step 15 From the left-side navigation, select **My content**.



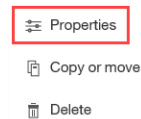
---

Step 16 Locate the report.

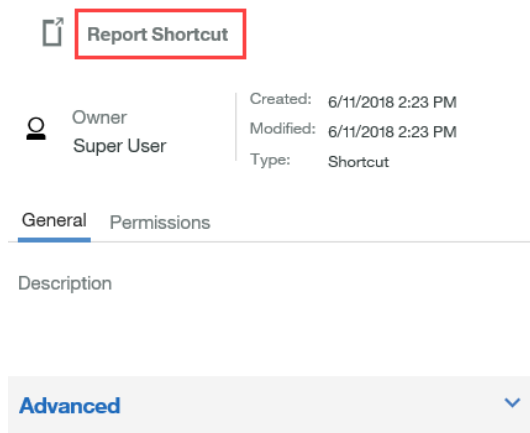
Step 17 Select the **More** icon for the desired report.



Step 18 Select **Properties**.



Step 19 In the report name field, update the report name.



**You have completed this scenario.**

---

# Scenario 5: Schedule Reports

## Scenario

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

- Set schedule
- Update schedule
- Delete schedule

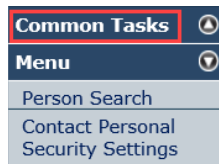
## System Logic

- To set a schedule to a report, it must first be run and saved within the **My content** tab.
- The criteria used in the original report will remain the same when the schedule runs. To update report criteria, see Scenario 5.
- Only one schedule can be associated with each entry.
- By default, schedules will have an end date and time. Select the **No end date** checkbox for the schedule to run indefinitely

## Step Actions

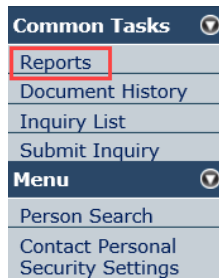
### Run

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

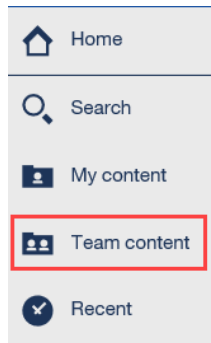


---

Step 2 Select **Reports**.



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



---

Step 4 Select **PSR REPORTS ENV98**.

---

Step 5 Locate the desired report.

---

Step 6 Select the report.

---

Step 7 Complete the report criteria.

---

Step 8 Select the **Finish** button.

---

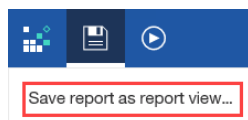
## Save

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 **Select another location** link.

---

Step 14 To save within a specific folder, select the radio button for the desired folder.

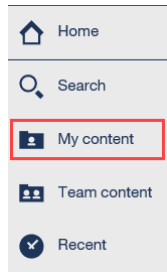


Step 15 Select the **OK** button.

Step 16 Select the **OK** button.

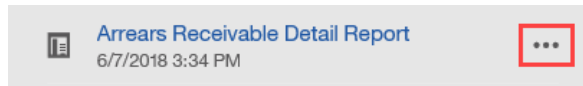
## Set Schedule

Step 17 From the left-side navigation, select **My content**.

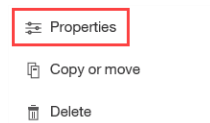


Step 18 Locate the report.

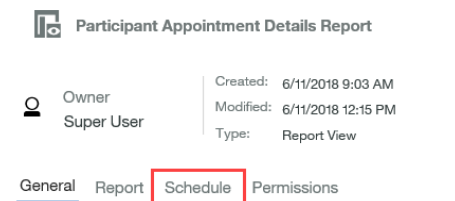
Step 19 Select the **More** icon for the report.



Step 20 Select **Properties**.

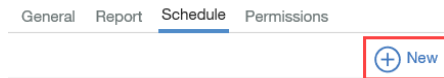


Step 21 Select the **Schedule** tab.





Step 22 Select the **New** icon.



---

Step 23 Create the desired schedule.

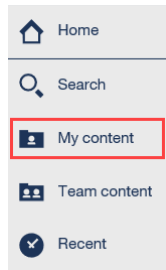
---

Step 24 Select the **Create** button.

---

## Update Schedule

Step 25 From the left-side navigation, select **My content**.

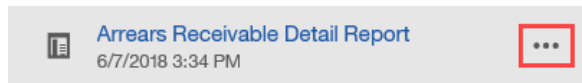


---

Step 26 Locate the report.

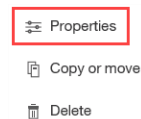
---

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



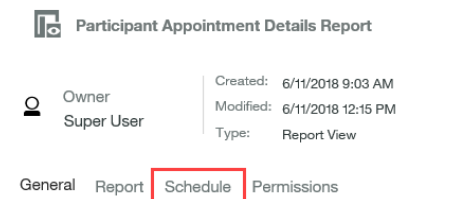
---

Step 28 Select **Properties**.



---

Step 29 Select the **Schedule** tab.



---

Step 30 Select the left arrow for the schedule.

---

Step 31 Update the schedule.

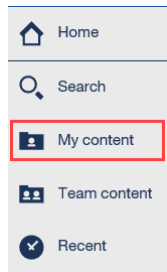
---

Step 32 Select the **Update** button.

---

## Delete Schedule

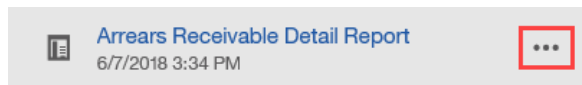
Step 33 From the left-side navigation, select **My content**.



---

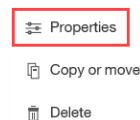
Step 34 Locate the report.

Step 35 Select the **More** icon for the report.



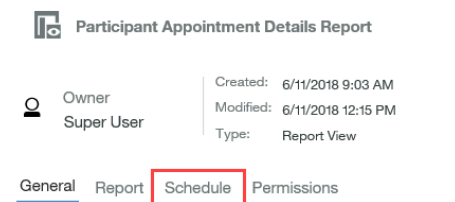
---

Step 36 Select **Properties**.



---

Step 37 Select the **Schedule** tab.



---

Step 38 Select the **Delete** button.

Step 39 Select the **OK** button.

**You have completed this scenario.**

---

## Scenario 6: Manage My Content

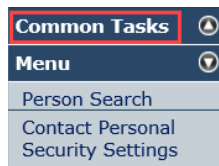
### Scenario

Within **My content**, you will utilize the different features in Cognos to add folders and sub-folders, and copy, move, rename, and delete items.

### Step Actions

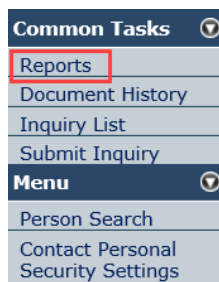
#### Add Folder

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



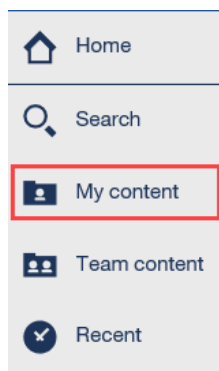
---

Step 2 Select **Reports**.



---

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



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



Step 5 Enter the desired folder name.

Step 6 Press the **Enter** key.

### Add Sub Folder

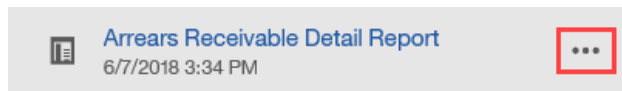
Step 7 From the **My content** folder, open the folder where you wish to add a sub-folder.

Step 8 Repeat steps 4-6.

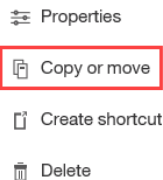
### Copy

Step 9 Locate the item you wish to copy.

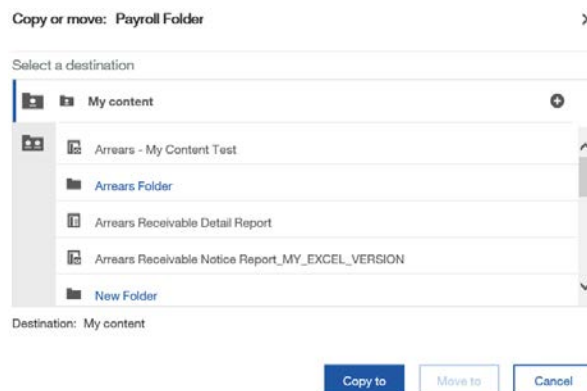
Step 10 Select the **More** icon for the item you wish to copy.



Step 11 Select **Copy or move**.



Step 12 Select the desired location to save the copied item.



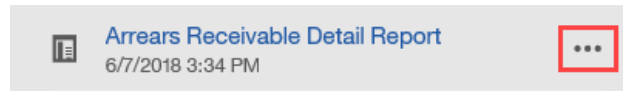
Step 13 Select the **Copy to** button.

## Move

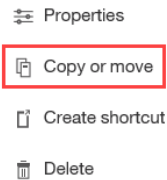
Step 14 From the **My content** folder, locate the item you wish to move.

---

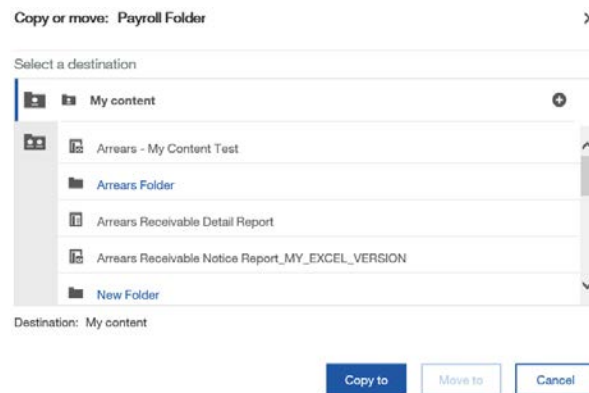
Step 15 Select the **More** icon for the item you wish to move.



Step 16 Select **Copy or move**.



Step 17 Select the desired location to save the moved item.



Step 18 Select the **Move to** button.

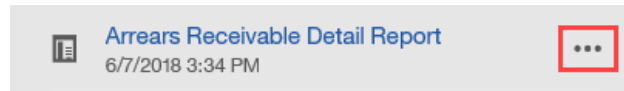
---

## Delete

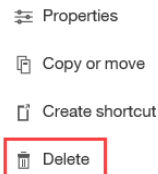
Step 19 From the **My content** folder, locate the item you wish to delete.

---

Step 20 Select the **More** icon for the item you wish to delete.



Step 21 Select **Delete**.



Step 22 Select **OK**.

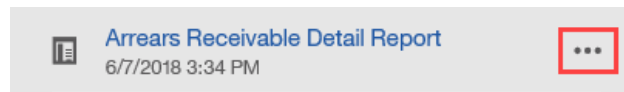
---

## Rename

Step 23 From the **My content** folder, locate the item you wish to rename.

---

Step 24 Select the **More** icon for the item you wish to rename.



Step 25 Select **Properties**.

---

Step 26 Update the name of the item.

**You have completed this scenario.**

---

## Employer Reports Resources

To generate Cognos reports within my|CalPERS, ensure the report you want to run is available, your web browser is configured to allow Cognos to function properly, and you have the proper user roles to run the report.

### [my|CalPERS Employer Reports \(Cognos\) Page](#)

[my|CalPERS Employer Reports \(Cognos\)](#)

**Pathway:** CalPERS website > Employers > my|CalPERS Technical Requirements > my|CalPERS Employer Reports (Cognos)

This page provides a listing of reports, an example and description of each report, the user role needed to generate the report, and the status of each report.

### [my|CalPERS Cognos Reports Browser Requirements](#)

[my|CalPERS Cognos Reports Browser Requirements](#) (PDF)

**Pathway:** CalPERS website > Employers > my|CalPERS Technical Requirements > my|CalPERS Employer Reports (Cognos) > my|CalPERS Cognos Reports Browser Requirements

Internet Explorer may need to be configured to successfully generate Cognos reports. It may also need to be reconfigured if updated.

### [System Access Administration Student Guide](#)

[my|CalPERS System Access Administration Student Guide](#) (PDF)

**Pathway:** CalPERS website > Employers > my|CalPERS Technical Requirements > System Access Administrators > my|CalPERS System Access Administration Student Guide

The student guide provides your system access administrator the steps to maintaining your agency's system access.

### [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 Data
- PDF
- CSV

# CalPERS Resources and Contacts

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## CalPERS Resources

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

### Resources Links

- [my|CalPERS Student Guides](#)  
**Pathway:** CalPERS website > Employers > I Want To...: Find my|CalPERS Student Guides
- [Employer Education Schedule](#) (PDF)  
**Pathway:** CalPERS website > Employers > I Want To... : Find my|CalPERS Student Guides > Employer Education Schedule
- [Online Classes for Employers](#) (PDF)  
**Pathway:** CalPERS website > Employers > I Want To... : Find my|CalPERS Student Guides > Online Classes for Employers
- [my|CalPERS Technical Requirements](#)  
**Pathway:** CalPERS website > Employers > my|CalPERS Technical Requirements
- [System Access Administrators](#)  
**Pathway:** CalPERS website > Employers > my|CalPERS Technical Requirements > System Access Administrators

## CalPERS Contacts

### Contact CalPERS via 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

### Contact CalPERS by 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 my|CalPERS. Expand the **Common Tasks** left-side navigation folder, and select the **Submit Inquiry** link to submit a question or request.