

myCalPERS Employer Reports (Cognos)

Student Guide

January 18, 2020



Employer Reports (Cognos)

myCalPERS generates reports using IBM Cognos software. Cognos queries your agency’s data in myCalPERS 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 myCalPERS System Training instructor-led class, new users should review the [Introduction to myCalPERS for Business Partners \(PDF\)](#) student 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

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

Search

The intuitive search allows you to search for an available report without having to scroll through the list of reports.

My content

You can save, move, or delete reports and folders in your **My 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 most commonly used reports.

Type (Filter)

The **Type** 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 **PSR_Reports_ENV98** folder, 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 to re-run the report (see scenario 2).

Step Actions

Run Report

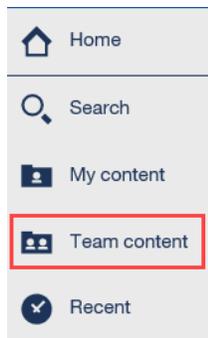
Step 1 From the home page, select **Common Tasks** from the left-side navigation.



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 desired 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 the desired 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.

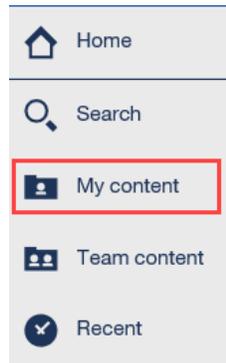


Step 16 Select either the **Select My Folders** link.

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

Scenario

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

System Logic

- Criteria 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 Locate the report.

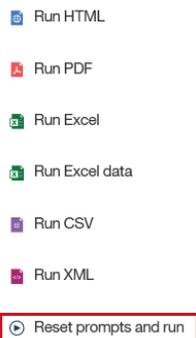
Step 2 Select the report link.



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

Step Actions

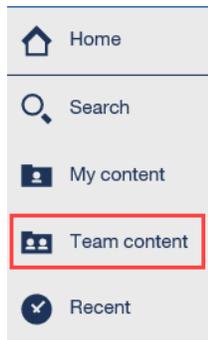
Step 1 From the home page, select **Common Tasks** from the left-side navigation.



Step 2 Select **Reports**.



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



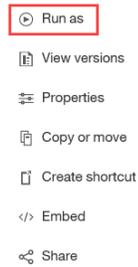
Step 4 Select the **PSR REPORTS ENV98** link.

Step 5 Locate the desired report.

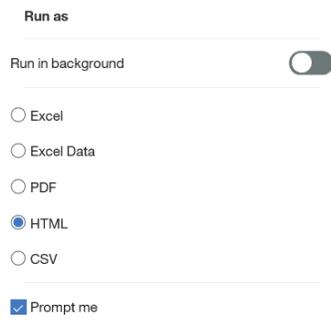
Step 6 Select the **More** icon for the desired report.



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: Create Report View (Shortcut)

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 the **PSR_REPORTS_ENV98** link.

Step 5 Locate the desired report.

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



Step 7 Select **Create report view**.

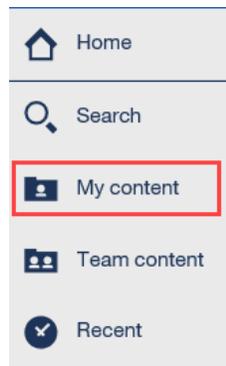
Step 8 Select the desired location to save the report.

Step 9 If desired, rename the report 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: Schedule Reports

Scenario

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

- Set a schedule
- Review versions
- 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.
- 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 desired 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.

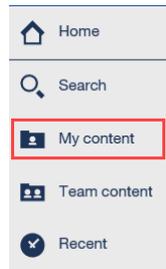


Step 12 Select the **Select My Folders** link.

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.

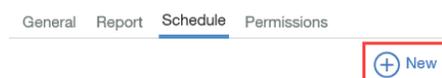


Step 17 Select **Properties**.

Step 18 Select the **Schedule** tab.



Step 19 Select the **New** icon.



Step 20 Create the desired schedule.

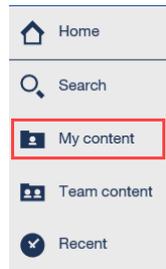
Step 21 Confirm the schedule has an End Date.

Step 22 Under Options, confirm that 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.

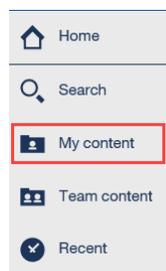


Step 27 Select **View versions**.

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.



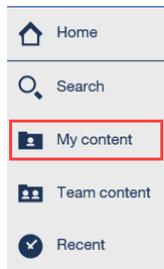
Step 34 Select the right arrow for the schedule.

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 6: Manage My Content

Scenario

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

Step Actions

Add Folder

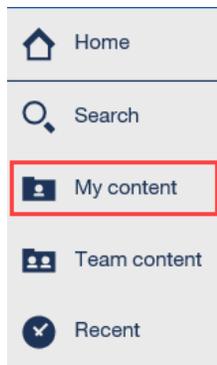
Step 1 From the home page, select **Common Tasks** from the left-side navigation.



Step 2 Select **Reports**.



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



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



Step 5 Select the **Folder** button.

Step 6 Enter the desired folder name.

Step 7 Press the **Enter** key.

Add Sub Folder

Step 8 From the **My content** folder, open the folder where you wish to add a sub-folder.

Step 9 Repeat steps 4-6.

Delete

Step 10 From the **My content** folder, locate the item you wish to delete.

Step 11 Select the **More** icon for the item you wish to delete.



Step 12 Select **Delete**.

Step 13 Select **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 Update the name of the item.

You have completed this scenario.

Employer Reports Resources

To generate Cognos reports within myCalPERS, 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.

myCalPERS Employer Reports (Cognos) Page

[myCalPERS Employer Reports \(Cognos\)](#)

Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > myCalPERS 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.

myCalPERS Cognos Reports Browser Requirements

[myCalPERS Cognos Reports Browser Requirements \(PDF\)](#)

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

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

myCalPERS System Access Administration Student Guide

[myCalPERS System Access Administration \(PDF\)](#)

Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > System Access Administrators > myCalPERS System Access Administration (PDF)

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
- XML

CalPERS Resources

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

- [myCalPERS Student Guides](#)
Pathway: CalPERS website > Employers > I Want To... : Find myCalPERS Student Guides
- [Employer Education Schedule \(PDF\)](#)
Pathway: CalPERS website > Employers > I Want To... : Find myCalPERS Student Guides > Employer Education Schedule (PDF)
- [Online Classes for Employers \(PDF\)](#)
Pathway: CalPERS website > Employers > I Want To... : Find myCalPERS Student Guides > Online Classes for Employers (PDF)
- [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

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 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 seek, you are welcome to request a custom report. Special report requests can be submitted using the **Submit Inquiry** link (see above) in your myCalPERS account or by calling CalPERS at **888 CalPERS** (or **888-225-7377**).