

# myCalPERS Employer Reports (Cognos)

Student Guide

October 19, 2024



# 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 – Page 3
- Scenario 1: Manage My Content – Page 4
- Scenario 2: Run Reports – Page 6
- Scenario 3: Update Report Criteria – Page 9
- Scenario 4: Run Reports in Different Formats – Page 10
- Scenario 5: Create Report View (Shortcut) – Page 12
- Scenario 6: Run in the Background – Page 14
- Scenario 7: Schedule Reports – Page 19
- CalPERS Resources – Page 24
- CalPERS Contacts – Page 25

## myCalPERS Employer Reports Resources

### myCalPERS Employer Reports (Cognos) Catalog

The [myCalPERS Employer Reports \(Cognos\) Catalog](#) provides a list of available reports, samples of the reports, descriptions, 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.

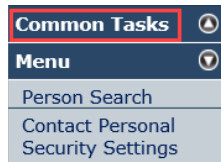
**Pathway:** CalPERS website > Employers > myCalPERS Technical Requirements > System Access Administrators > myCalPERS System Access Administration (PDF)

## Scenario 1: Manage My Content

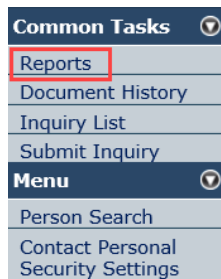
Within the My content folder, you will add folders and subfolders, and rename and delete folders and reports.

### Step Actions (16 steps)

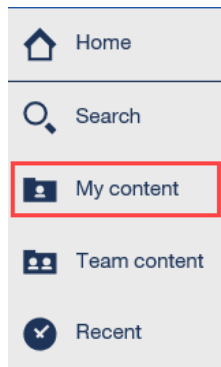
Step 1 From the homepage, select Common Tasks from the left-side navigation.



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



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



### Add 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 Subfolder

Step 8 From the My content folder, open the folder where you will add a subfolder.

---

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.

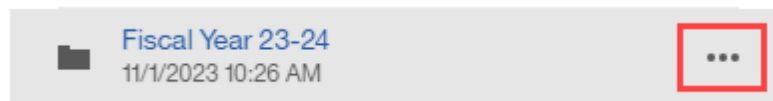
---

Step 12 Select the **OK** button.

---

## Rename

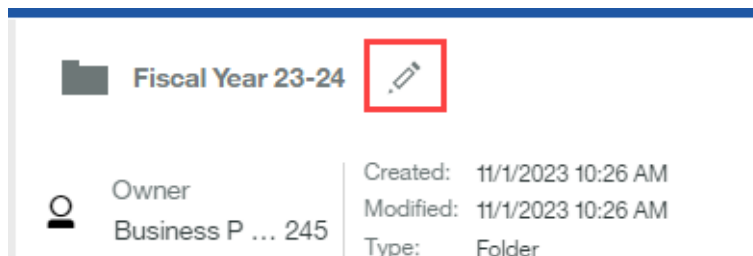
Step 13 From the My content folder, select the More icon next to the item.



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

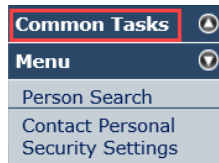
You will run a report, change the format, save, and then locate the saved report.

### System Logic

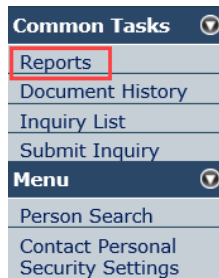
To re-run a report within the same session, update the report criteria (refer to scenario 3).

### Step Actions (18 steps)

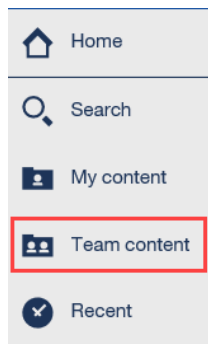
Step 1 From the homepage, select Common Tasks from the left-side navigation.



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



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



Step 4 Select the **PSR\_REPORTS\_ENV98** link.

### Run Report

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 run 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.

---

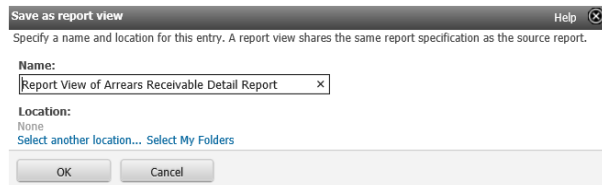
Step 12 Select the Add this report icon in the top left corner of the page.



Step 13 Select Save this report as report view....

---

Step 14 If desired, rename the report.



Step 15 Choose the **Select My Folders** link.

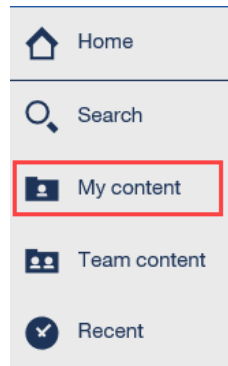
---

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.**

---

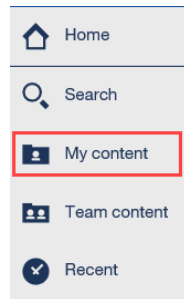


## Scenario 3: Update Report Criteria

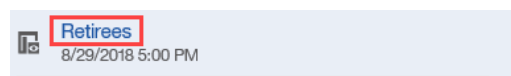
You will update the criteria of a report that is saved in your My content folder.

### Step Actions (7 Steps)

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.

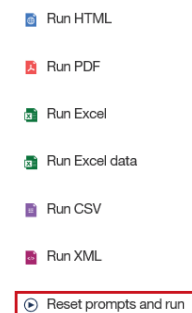


Step 4 Did the criteria page display?

**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.

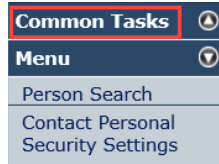
**You have completed this scenario.**

## Scenario 4: Run Reports in Different Formats

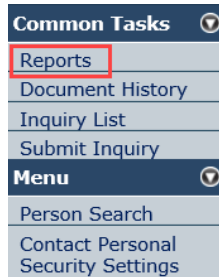
You will run a report in a format other than HTML (default).

### Step Actions (10 Steps)

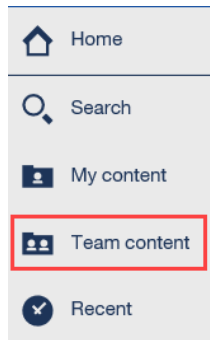
Step 1 From the homepage, select Common Tasks from the left-side navigation.



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

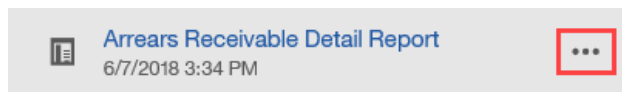


Step 3 From the left-side navigation, select the Team content folder.



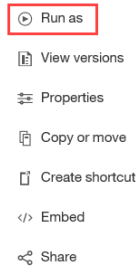
Step 4 Select the **PSR\_REPORTS\_ENV98** link.

Step 5 Select the More icon for the report.



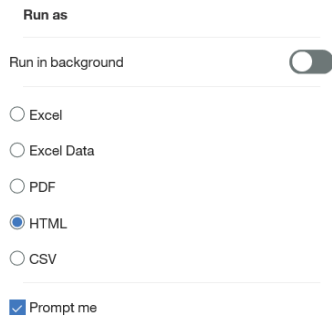
Step 6

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)

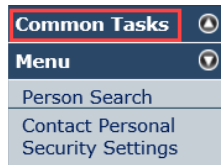
You will create a shortcut to run a report.

### System Logic

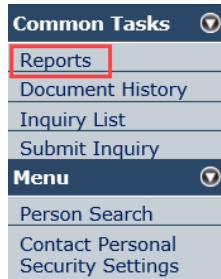
Do not use the Create Shortcut option as it may stop functioning over time.

### Step Actions (14 steps)

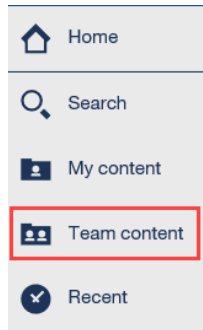
Step 1 From the homepage, select Common Tasks from the left-side navigation.



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

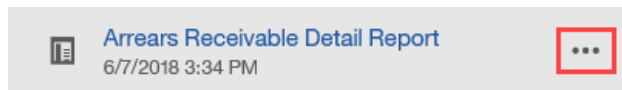


Step 3 From the left-side navigation, select the Team content folder



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.

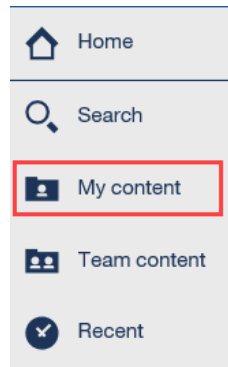
---

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.**

---

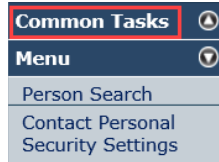
## Scenario 6: Run in the Background

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.

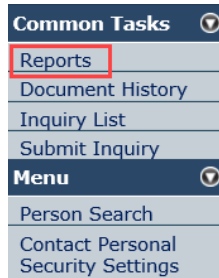
### Step Actions (27 steps)

#### Locate Report

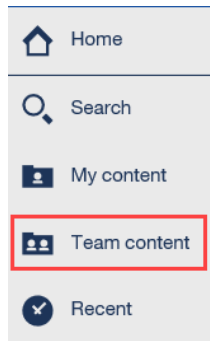
Step 1 From the homepage, select Common Tasks from the left-side navigation.



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

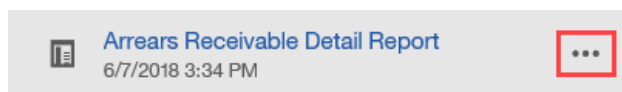


Step 3 From the left-side navigation, select the Team content folder.



Step 4 Select the **PSR\_REPORTS\_ENV98** link.

Step 5 Select the More icon for the report.



Step 6 Select Run as.

- Run as
- View versions
- Properties
- Copy or move
- Create shortcut
- Embed
- Share

Step 7 Turn on Run in background.

Run in background

Step 8 Select Advanced to expand the section.

Advanced ▾

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

Advanced ▲

Now  Later

Languages >

Delivery >

Classic view

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

Run with options - Contribution Summary for a Fiscal Year Report Help

Select how you want to run and receive your report.

**Format:**  
HTML ▾

**Accessibility:**  
 Enable accessibility support

**Language:**  
English ▾

**Delivery:**  
 View the report now  
 Print the report:  
**Printer location:**  
 [Select a printer...](#)

**Prompt values:**  
No values saved  
 Prompt for values

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

**Time and mode:**

View the report now

Run in the background:

Now

Later:

Apr 2, 2021

11 : 30 AM

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

**Time and mode:**

View the report now

Run in the background:

Now

Later:

Apr 2, 2021

11 : 30 AM

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).

**Formats:**

HTML

**Number of rows per Web page:**

20

Enable selection-based interactivity

PDF

No options saved

Set...

Excel 2007

Excel 2007 Data

Delimited text (CSV)

XML

**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.

**Delivery:**

Select at least one delivery method. For burst reports, the email recipients are determined by the burst specification.

Save the report as a report view [Edit the save options...](#)

[Report View of Contribution Summary for a Fiscal Year Report](#)

Print the report

**Printer location:**

[Select a printer...](#)

Send the report by email [Edit the email options...](#)

0 recipients

**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

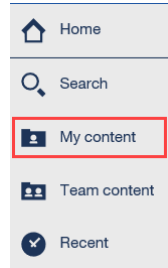
Step 19 Enter the criteria for the report.

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.

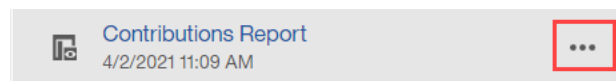


Step 23 Did you select more than one format?


**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.


 Run as

 View versions

 Properties

 Create shortcut




 Embed

 Share

 Delete

---

Step 26 Select the **Date** link.

 Apr 2, 2021 11:09 AM  

---

Step 27 Select the format you wish to display.

 Apr 2, 2021 11:09 AM    
EN    

**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

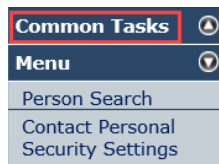
### System Logic

- 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.

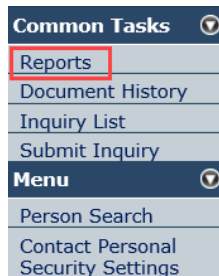
### Step Actions (38 steps)

#### Run

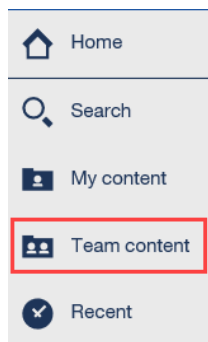
Step 1 From the homepage, select Common Tasks from the left-side navigation.



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



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.

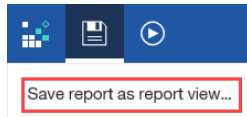
---

## Save

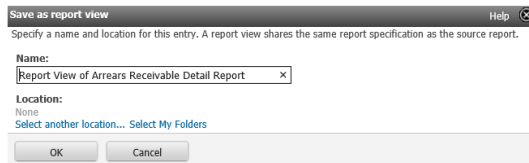
Step 8 Select the Add this report icon in the top left corner of the page.



Step 9 Select Save this report as report view....



Step 10 If desired, rename the report.



Step 11 Select the **Select My Folders** link.

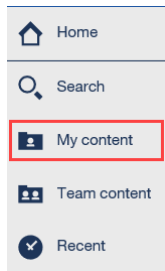
---

Step 12 Select the **OK** button.

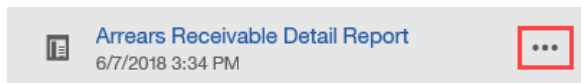
---

## Set Schedule

Step 13 From the left-side navigation, select My content.



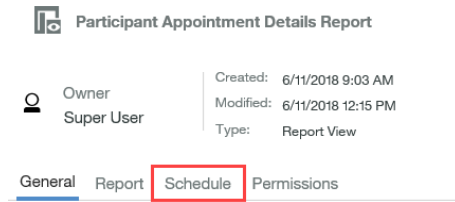
Step 14 Select the More icon for the saved report.



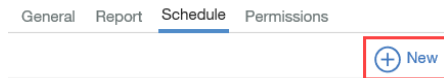
Step 15 Select Properties.

---

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.

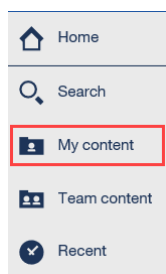
**Note:** Do not select the **No end date** check box.

Step 20 Under Options, confirm that the Delivery method is Save and the correct prompts (criteria) are selected/entered.

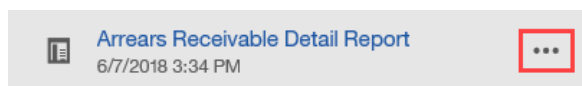
Step 21 Select the **Create** button.

## View Versions

Step 22 From the left-side navigation, select My content.



Step 23 Select the More icon for the saved report.

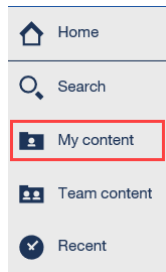


Step 24 Select View versions.

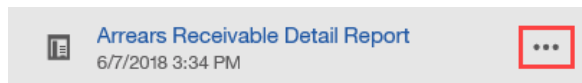
Step 25 Under the Versions tab, select the blue date link.

## Update Schedule

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

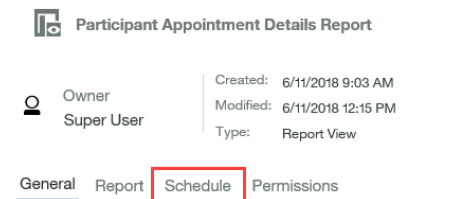


Step 27 Select the More icon for the saved report.



Step 28 Select Properties.

Step 29 Select the Schedule tab.



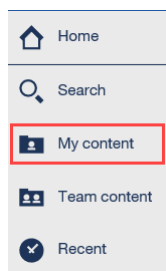
Step 30 Select the right arrow for the schedule.

Step 31 Update the schedule.

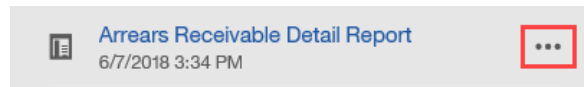
Step 32 Select the **Update** button.

## Delete Schedule

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



Step 34 Select the More icon for the saved report.

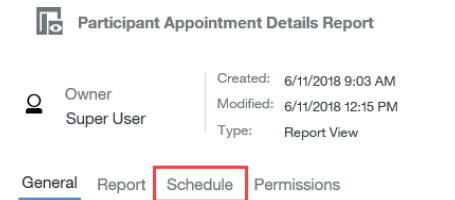


---

Step 35 Select Properties.

---

Step 36 Select the Schedule tab.



---

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](http://www.calpers.ca.gov) at [www.calpers.ca.gov](http://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](mailto: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](mailto: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](mailto:employer_technical_support@calpers.ca.gov).
- For health reports, email [hamd\\_data\\_services@calpers.ca.gov](mailto:hamd_data_services@calpers.ca.gov).