University of Colorado
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EMPLOYEE SERVICES

Human Capital Management: Step-by-Step Guide

Adding PER_ORG to PeopleSoft (PS) Query Reports

This guide outlines how to use the PER_ORG field to differentiate between Employees (EMP) and Contingent Workers (CWR) in PeopleSoft (PS) Query. It includes instructions to add filter criteria to limit reports to a population, to add prompts to reports, and add the field to the reports.

What's Happening?
As part of the Time & Labor implementation, the PER_ORG field will be used in HCM and CIW queries to define the organizational relationship of an individual to differentiate Contingent Workers and Employees.

Where Can PER_ORG Be Found?
The PER_ORG field can be found in multiple PeopleSoft records, including the JOB record. For CIW reporting, the JOB_PER_ORG_CODE and JOB_PER_ORG_DESC fields can be found in the HRMS_JOB_TBL.

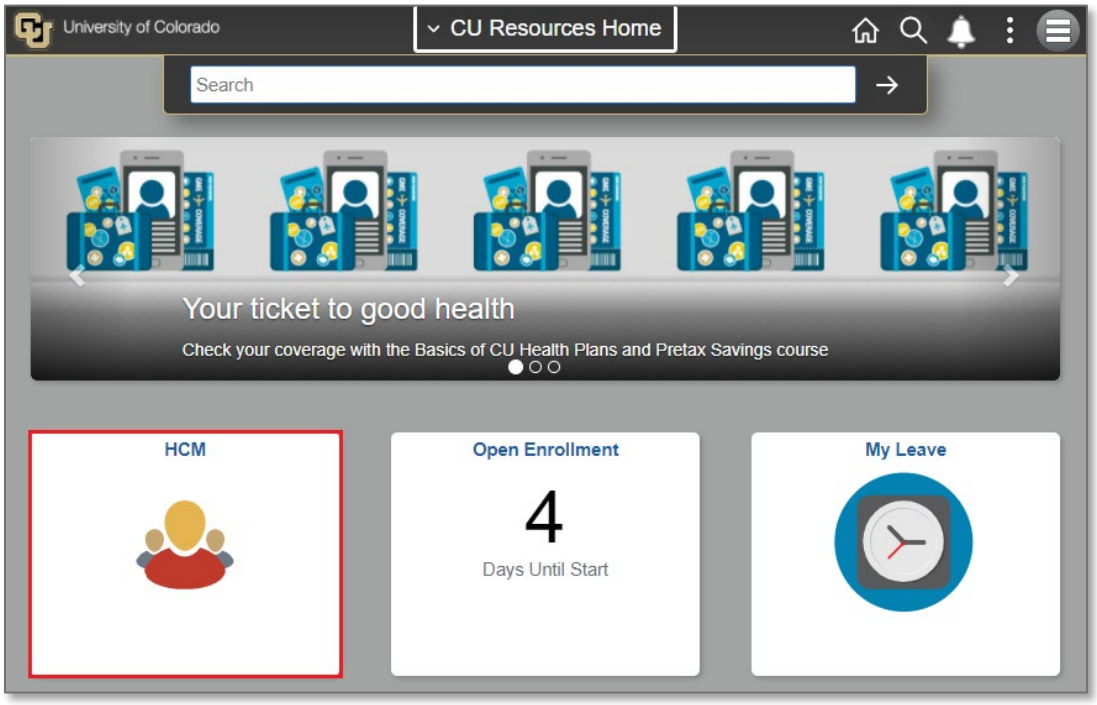
When Should PER_ORG Be Used?
Any private reports in PeopleSoft Query or the CIW will need to be updated to include the PER_ORG field. Reports can be updated to display PER_ORG in the results, refined with filter criteria to limit the results to the correct population, or modified with a query prompt to allow the user to select the organizational relationship at the time of report execution. All public reports with names containing the prefix "CUES" will be updated by the Employee Services Data Team.

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Navigating and Searching PS Query

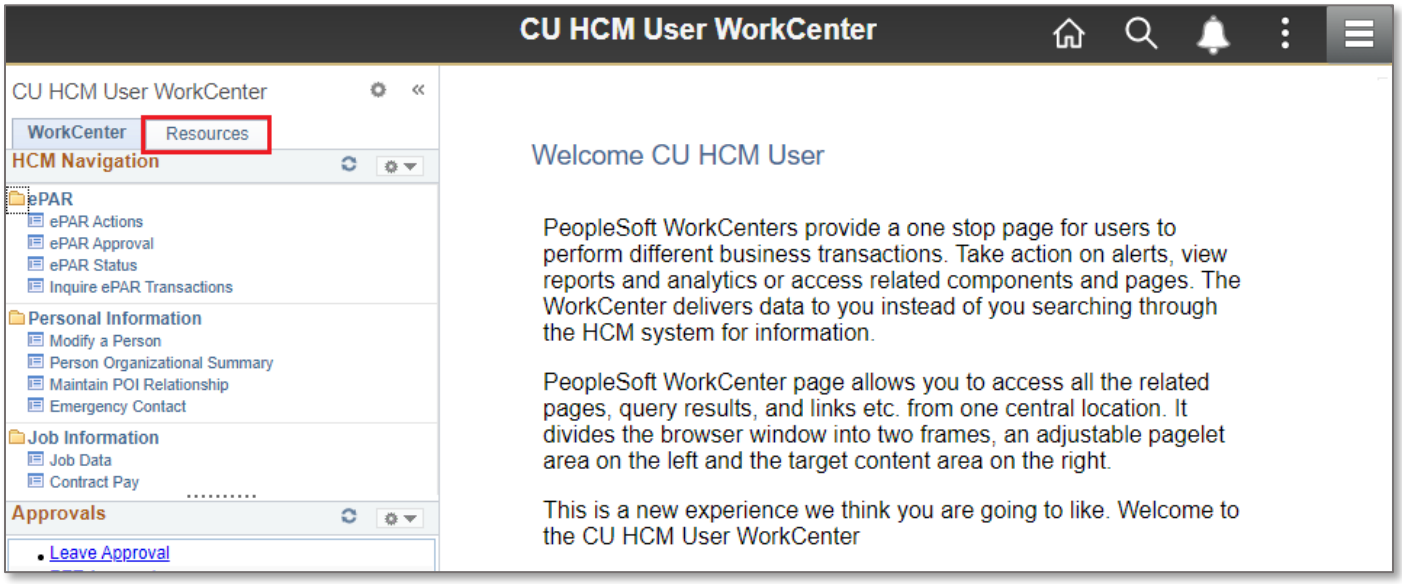
1. Log into the Employee Portal. Under the CU Resources Home drop-down menu, click on the **HCM** tile.


University of Colorado
CU Resources Home
Search
Your ticket to good health
Check your coverage with the Basics of CU Health Plans and Pretax Savings course
HCM
Open Enrollment
4
Days Until Start
My Leave

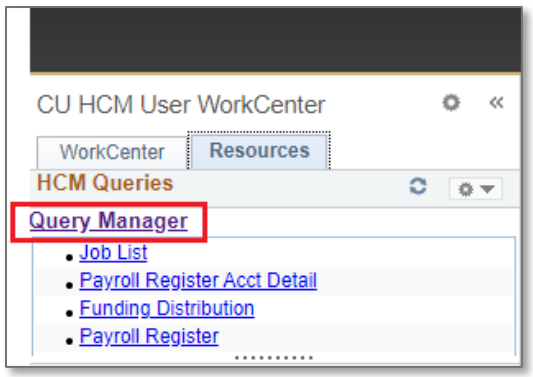
2. Under the HCM Community Users drop-down menu, click on **HCM WorkCenter** tile. Your tile layout may be different than shown above/below.



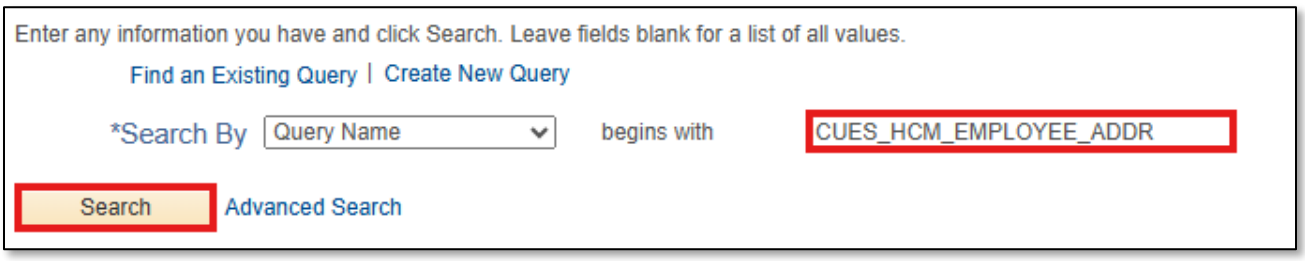
3. Click on the **Resources** tab on the left navigation pane.



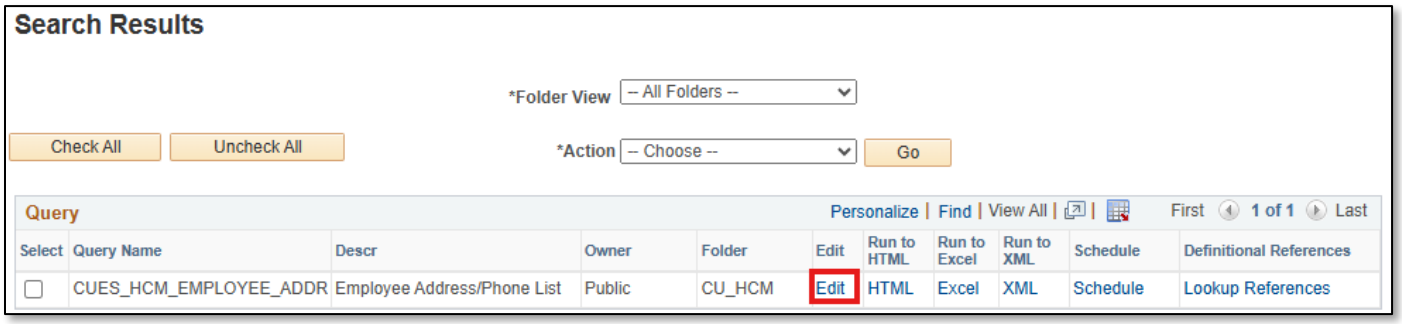
4. Click on **Query Manager**. The HCM page will then be displayed on the right side of the screen.



5. Locate the report to be updated by entering the query name into the blank search box and click **Search**.

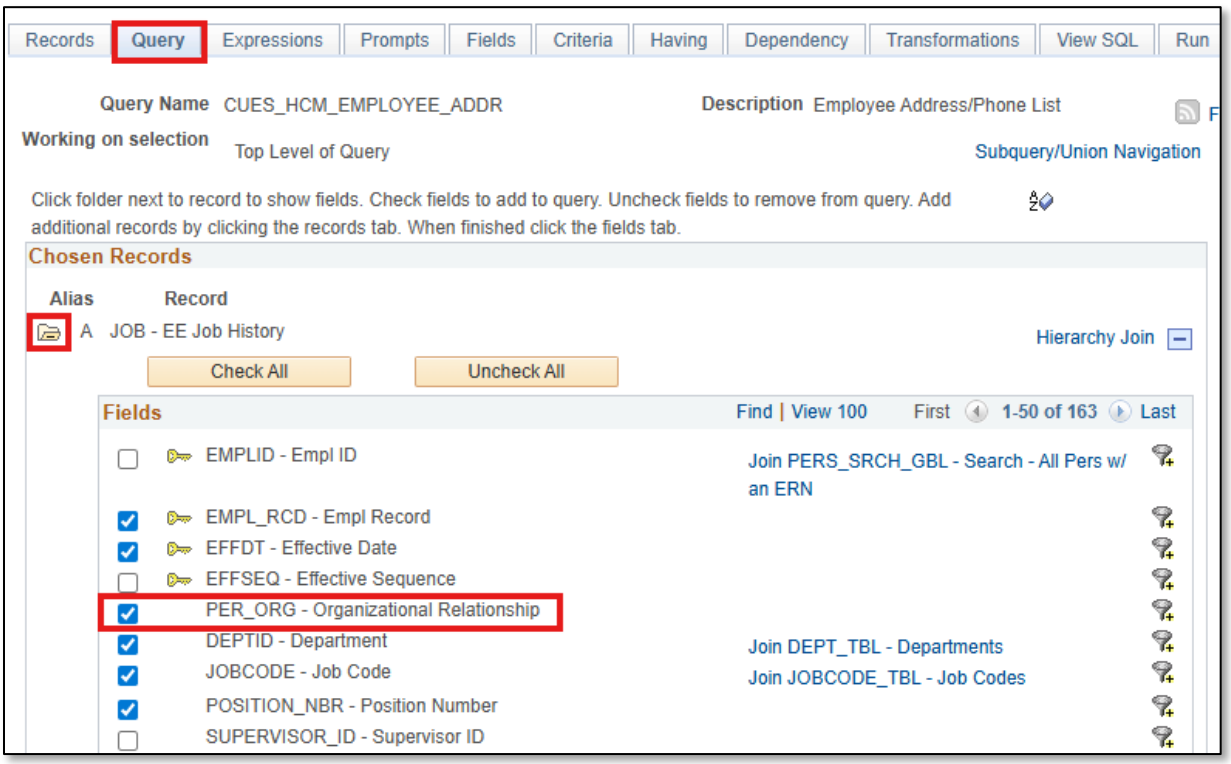


6. Click on **Edit** to open a new browser window and display the query prompt options.



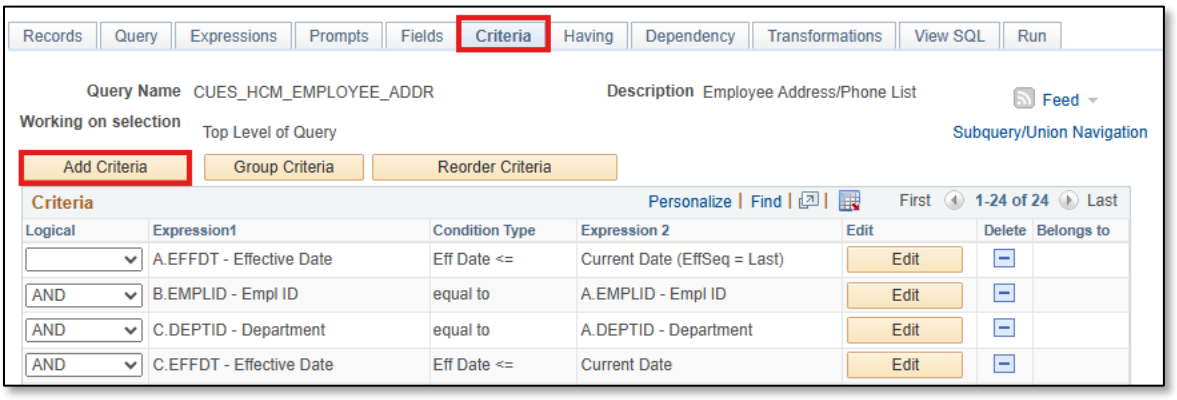
Adding PER_ORG as a Field in PS Query Reports

1. Click on the **Query** tab, expand the list of fields in the **JOB-EE Job History** record by clicking on the folder icon, and click the checkbox next to **PER_ORG – Organizational Relationship**. This adds the field to the report output. PER_ORG can be found in additional records such as EMPLOYEES, PERSONNEL, and CU_JOB_LIST_VW2.

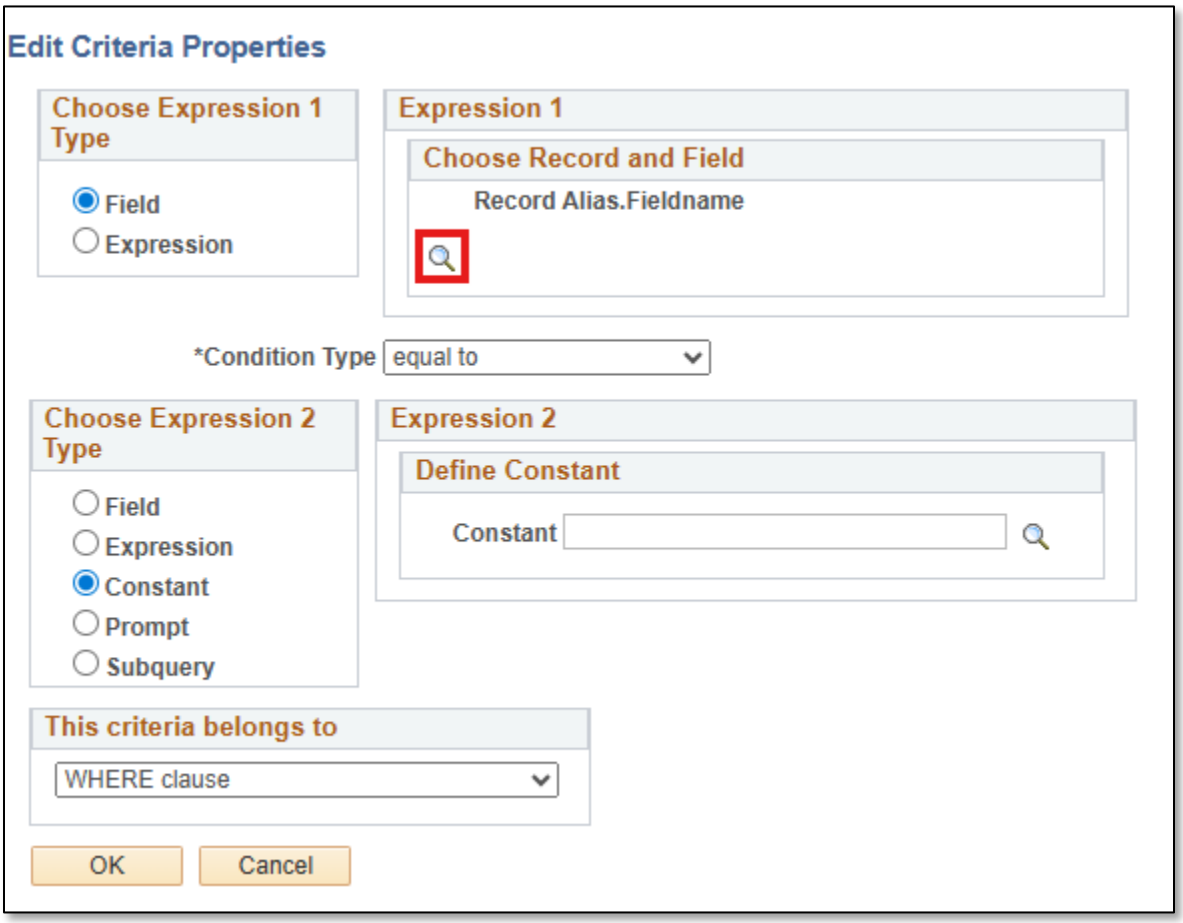


Adding PER_ORG as a Filter in PS Query Reports

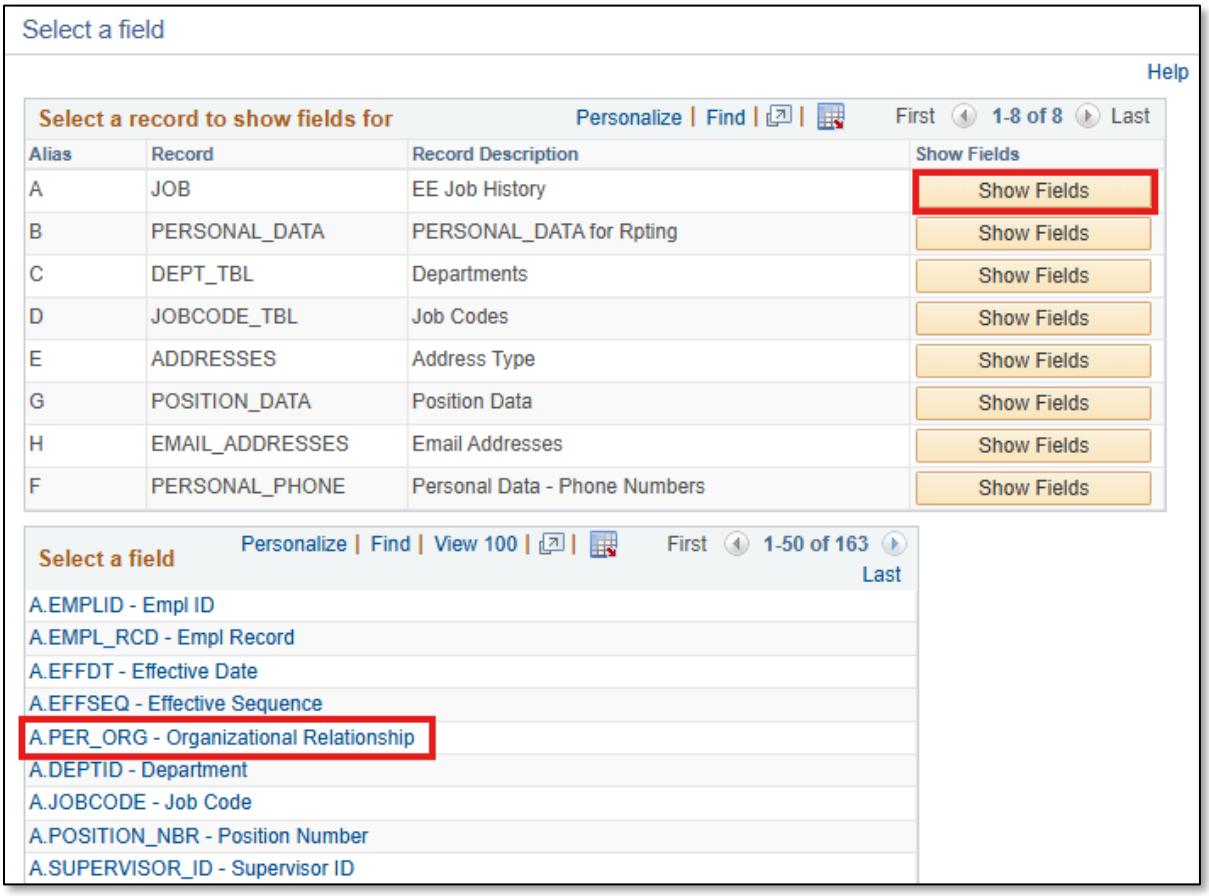
1. Click the **Criteria** tab and click **Add Criteria**.



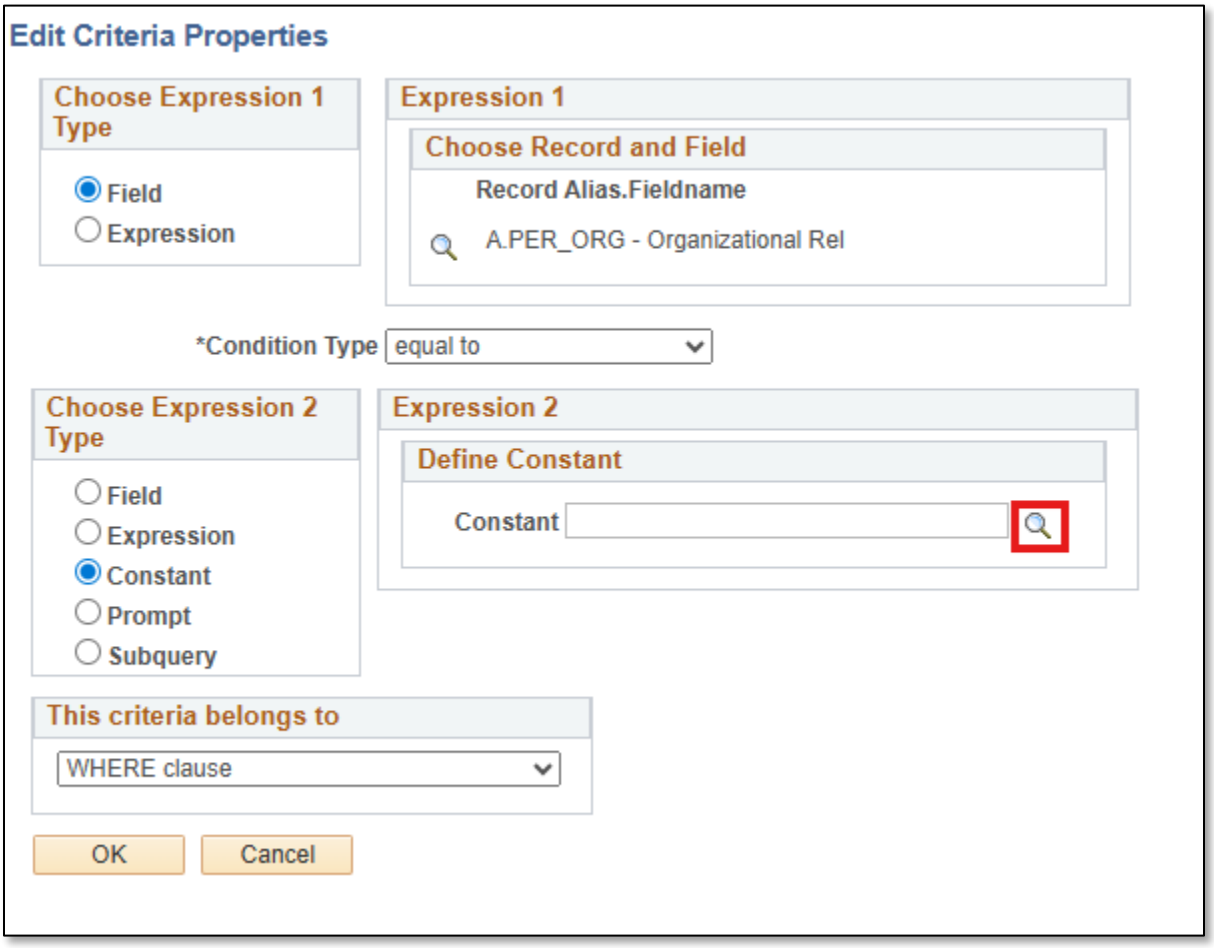
2. From the Edit Criteria Properties, click on the **magnifying glass** under Expression 1.



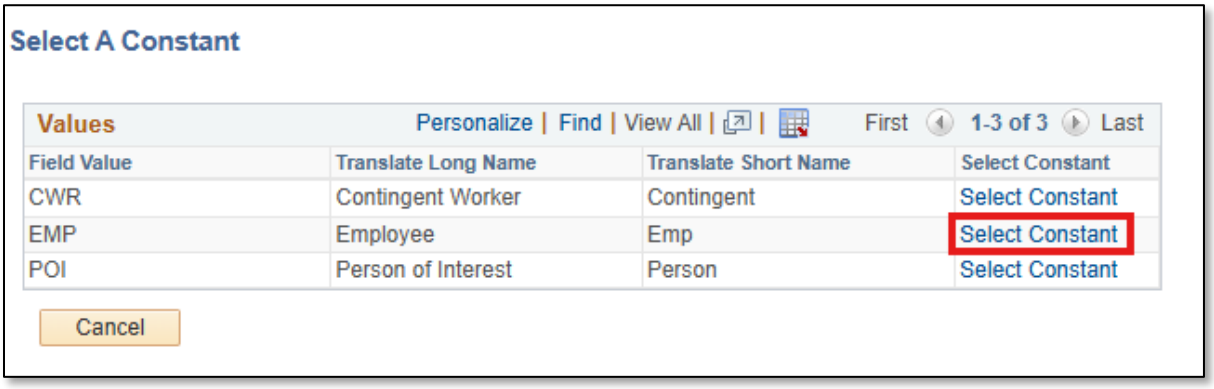
3. To select the field, click on **Show Fields** next to the appropriate record containing the PER_ORG field. In this case, the **JOB** record contains PER_ORG. Click on **PER_ORG** in the Select a field section.



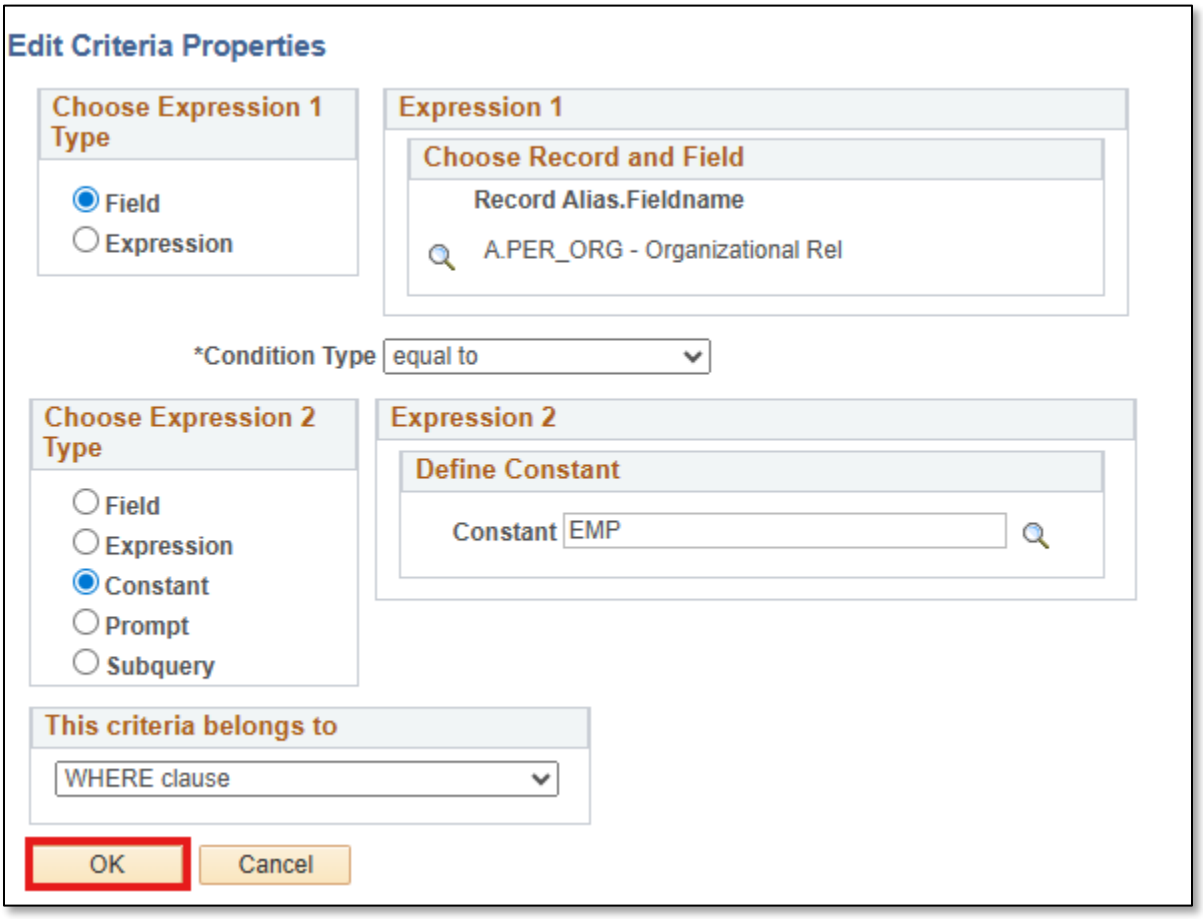
4. After selecting the PER_ORG field in Expression 1, select the condition type as **equal to** and click the **magnifying glass** in Expression 2 to select the appropriate value.



5. Click on **Select Constant** next to the appropriate PER_ORG field value. In this case, we are selecting EMP for Employee.

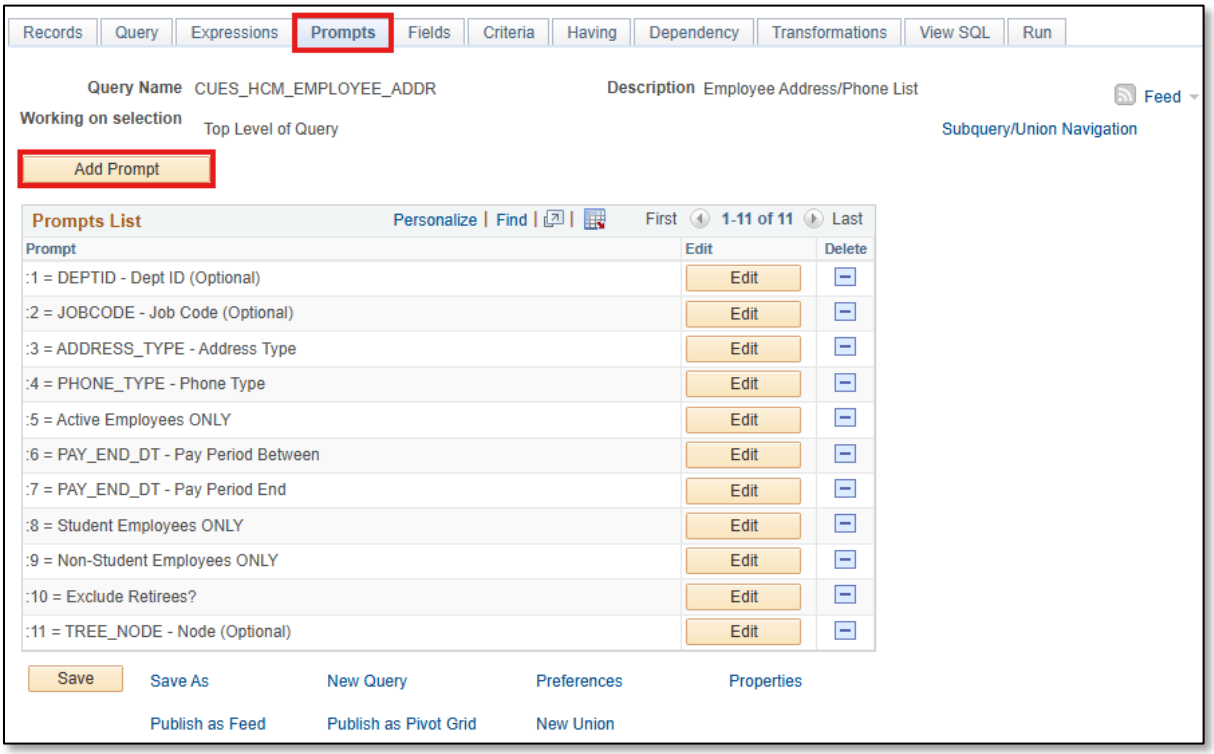


6. Select **OK** to add the report filter criteria.

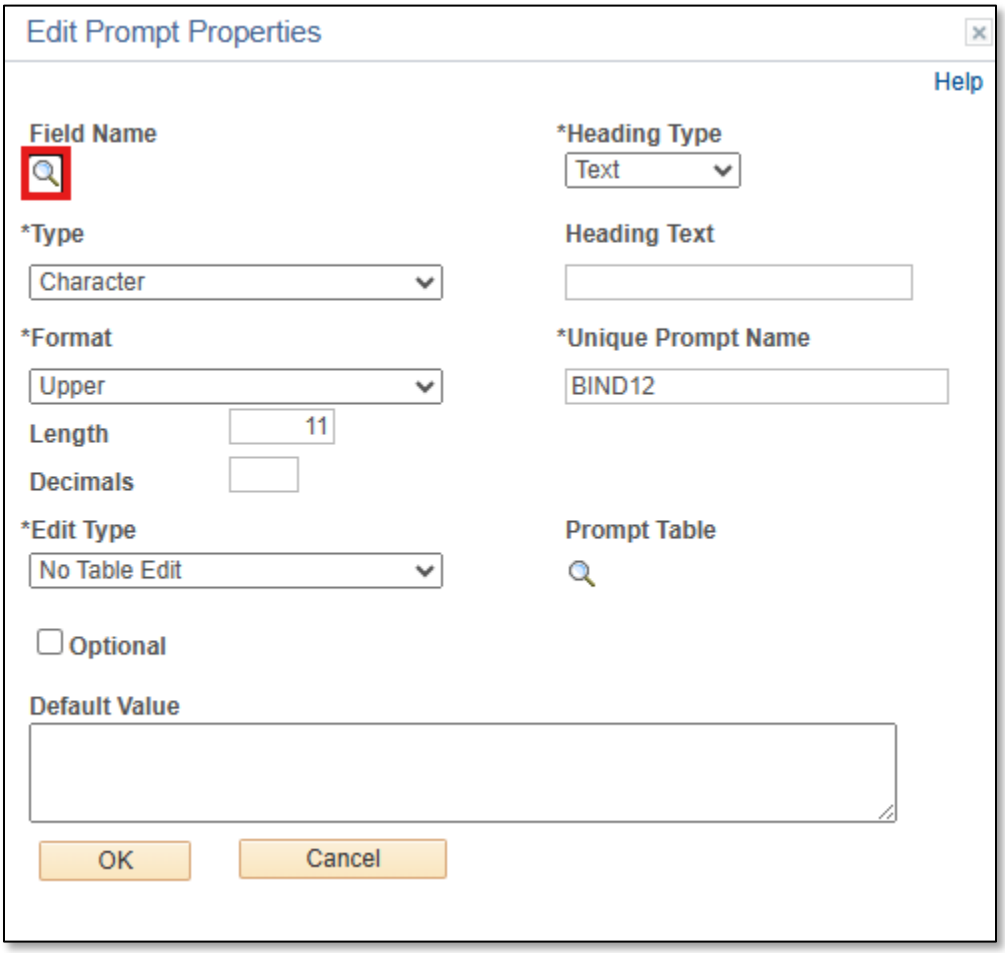


Adding PER_ORG as a Prompt in PS Query Reports

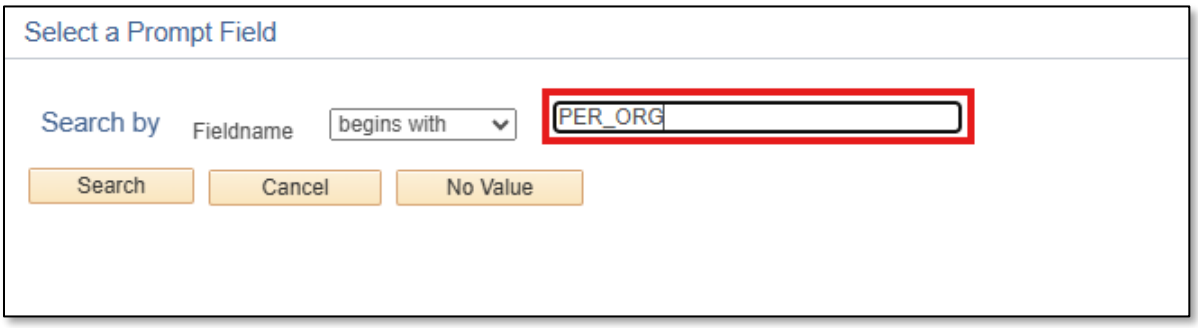
1. Click on the **Prompts** tab and click **Add Prompt**.



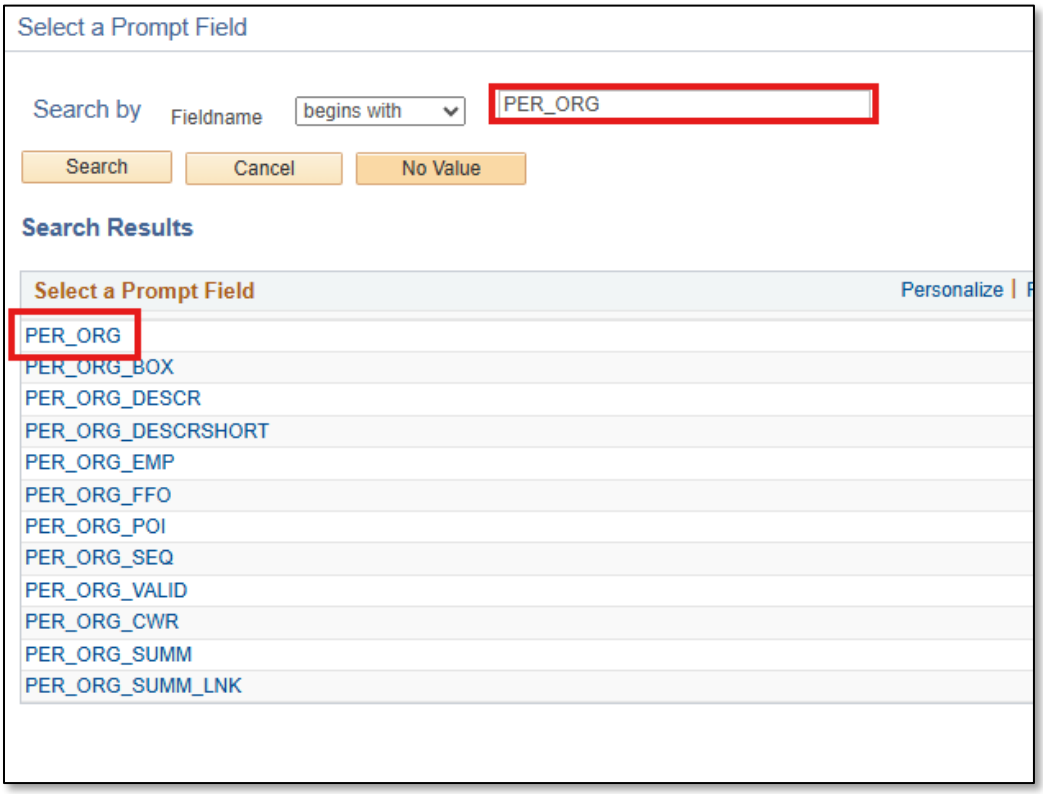
2. Click on the **magnifying glass** on the Edit Prompt Properties page.



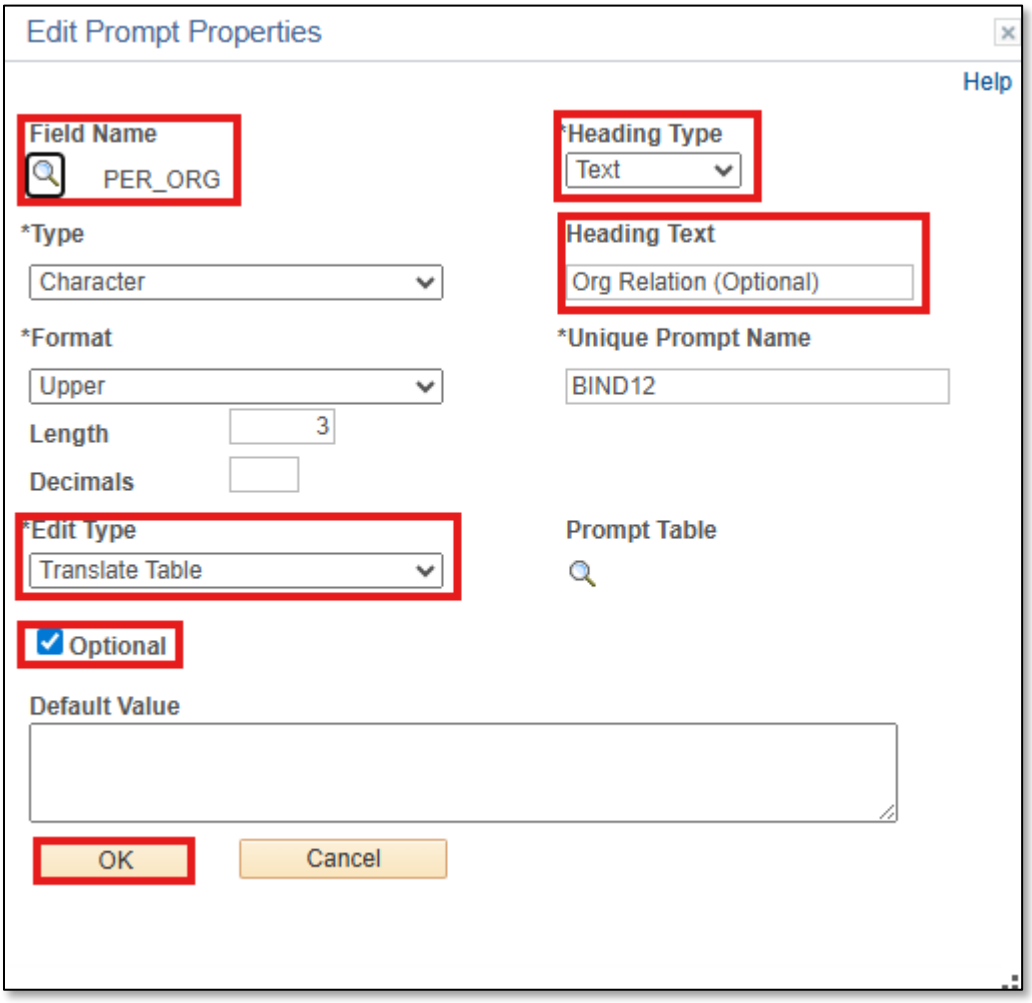
3. Search Fieldname of **PER_ORG.**



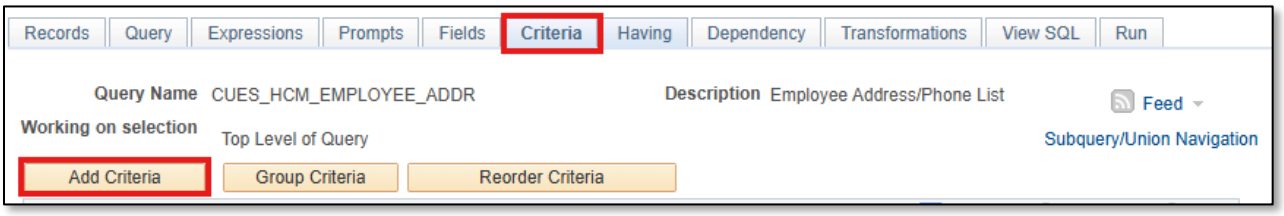
4. Click on **PER_ORG** in the Search Results.



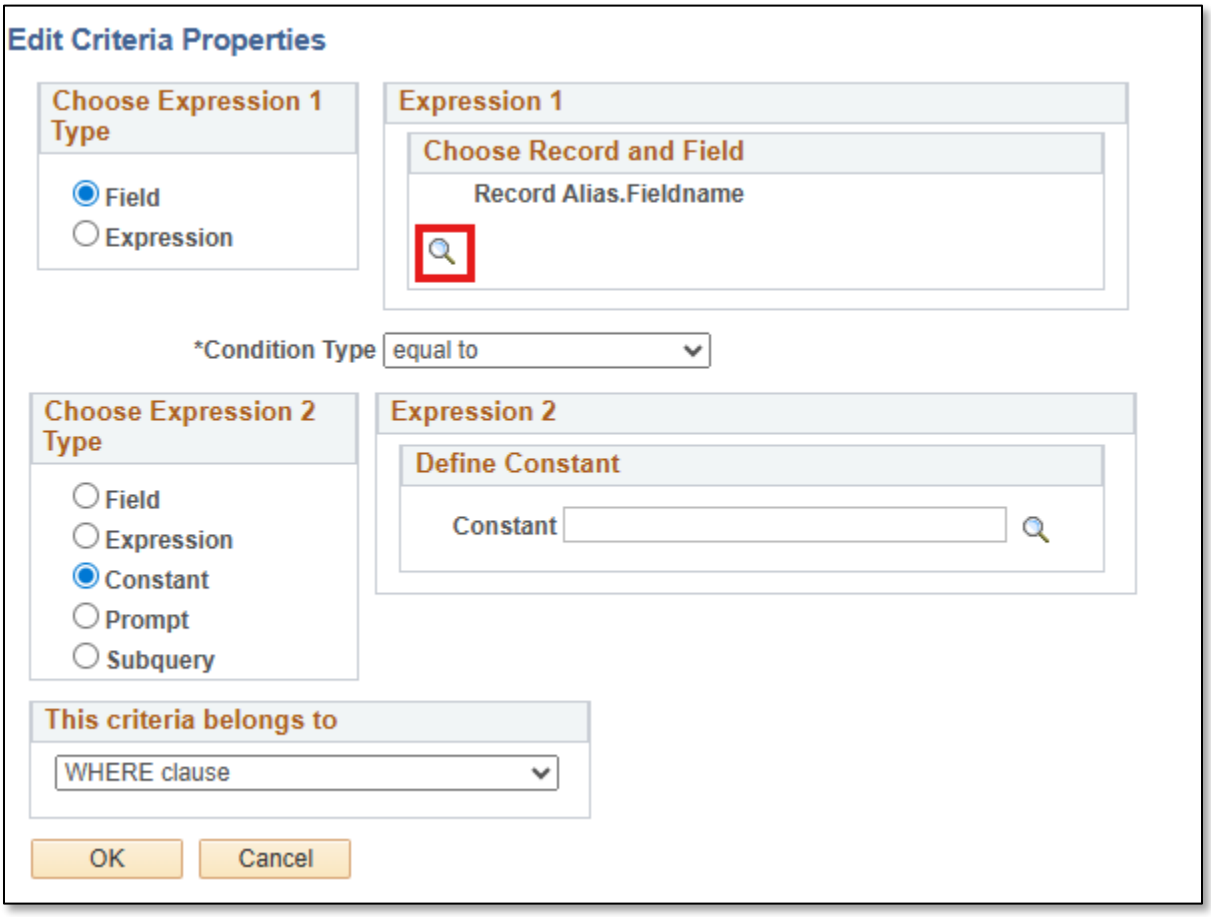
5. In the Edit Prompt Properties, using the **Heading Type** of **Text** will allow you to use a custom **Heading Text** for the report column. In the **Edit Type**, selecting Translate Table will display the translated values of Contingent Worker, Employee or Person of Interest instead of the PER_ORG code values of CWR, EMP, or POI. Selecting the **Optional** checkbox allows the report to run with or without a selection in this prompt.



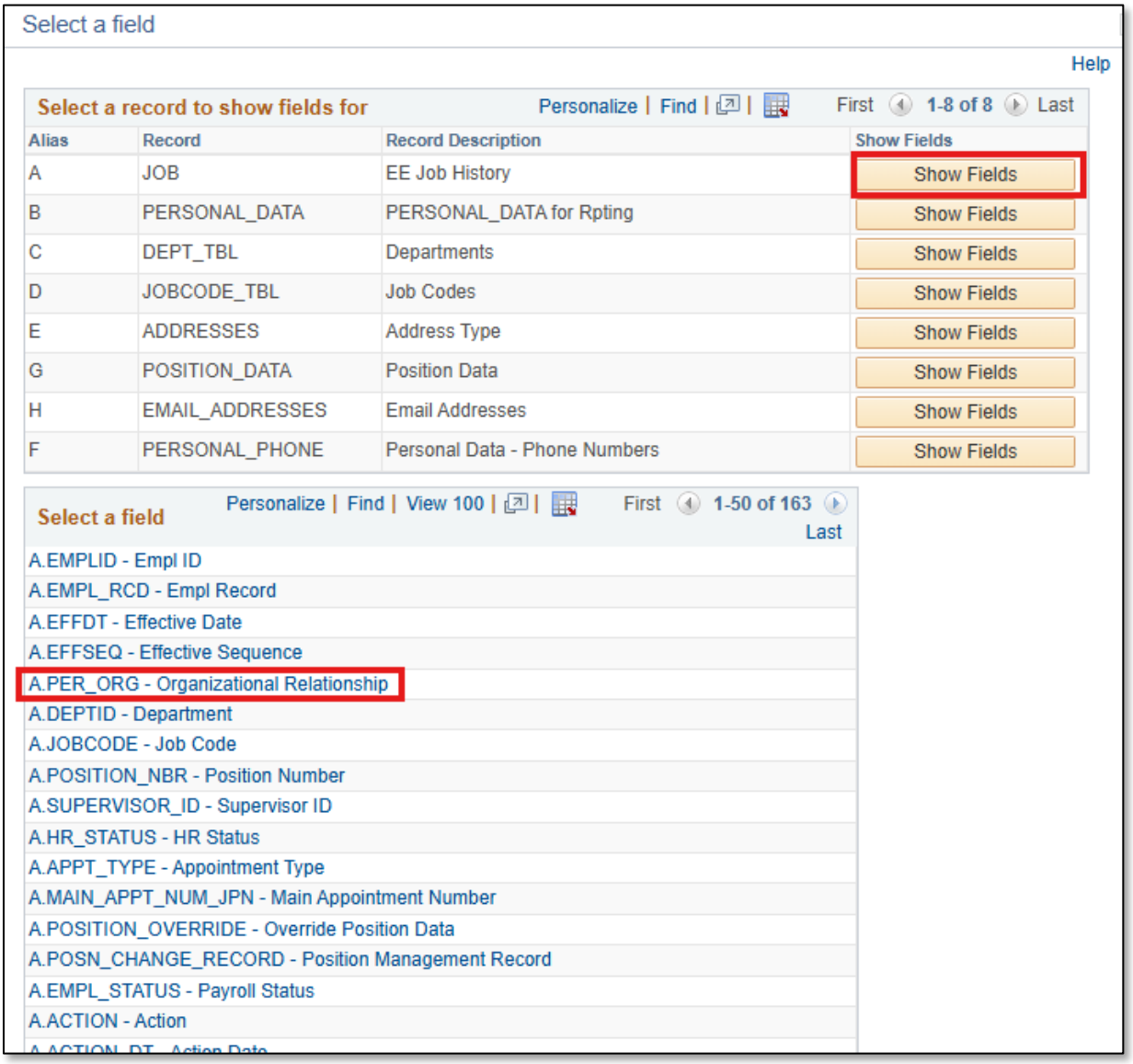
6. **Click Criteria** and **Add Criteria**.



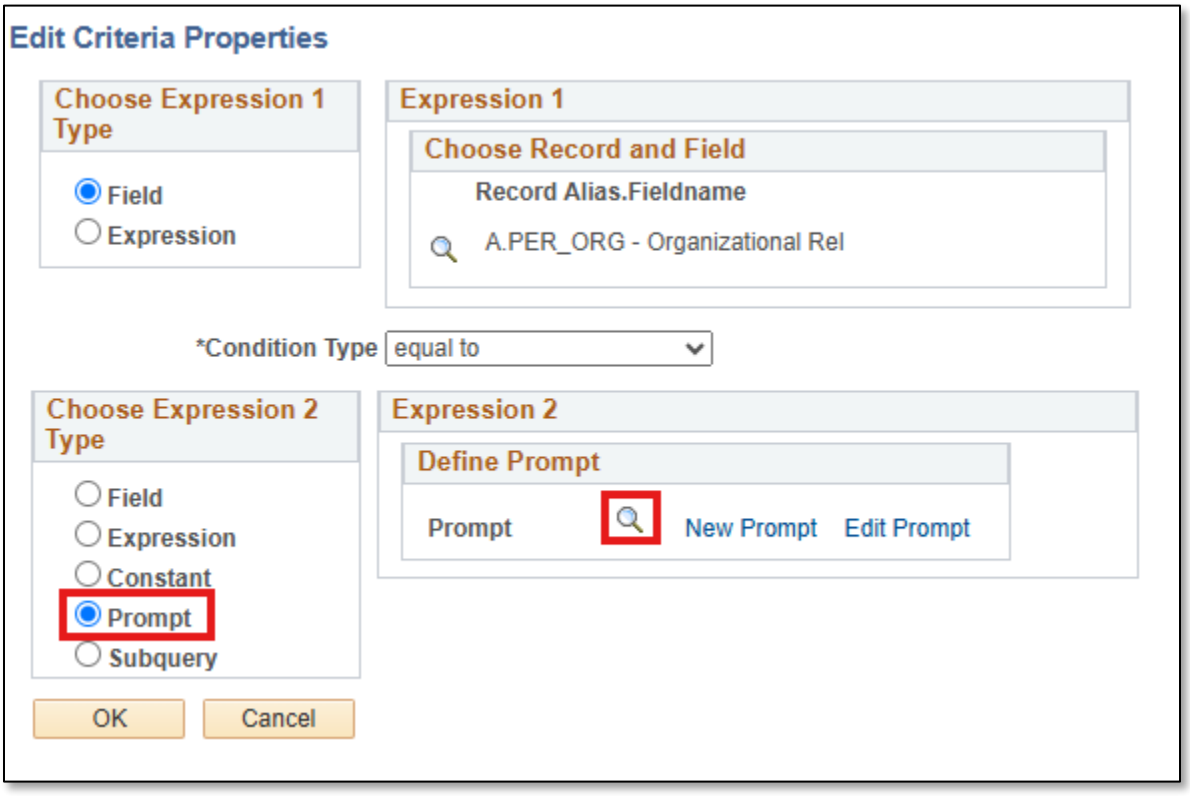
7. In the **Edit Criteria Properties** window, click the magnifying glass in Expression 1.



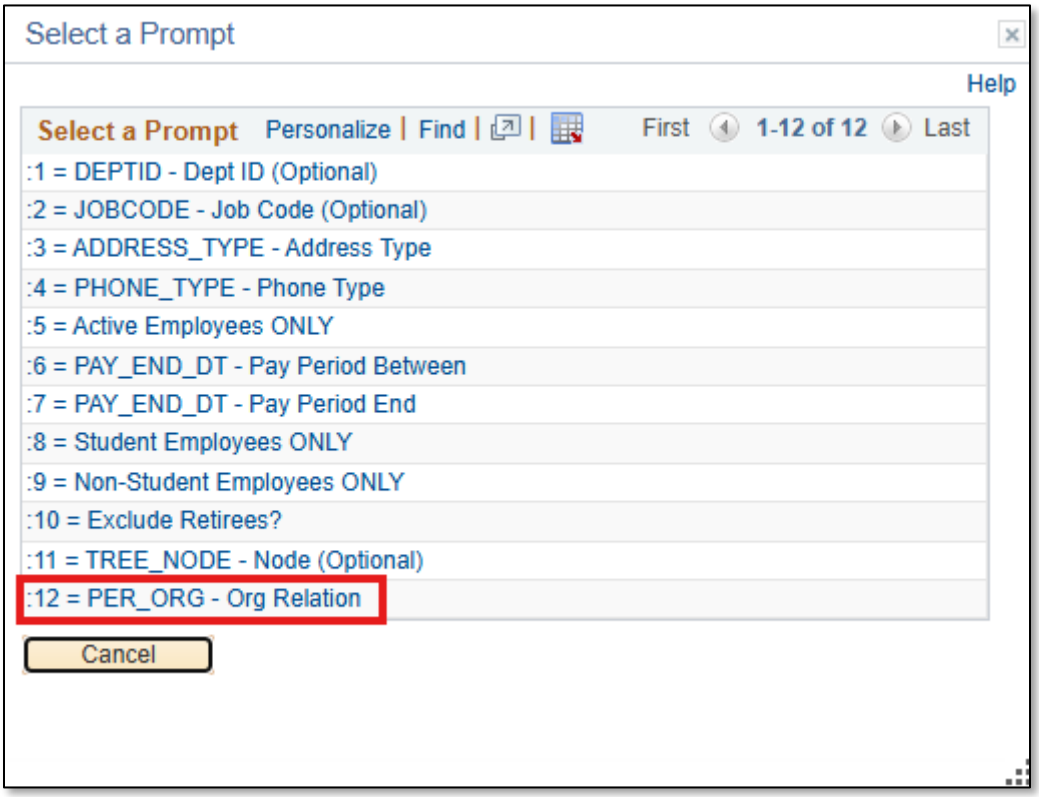
8. Select the **PER_ORG** field from the appropriate record.



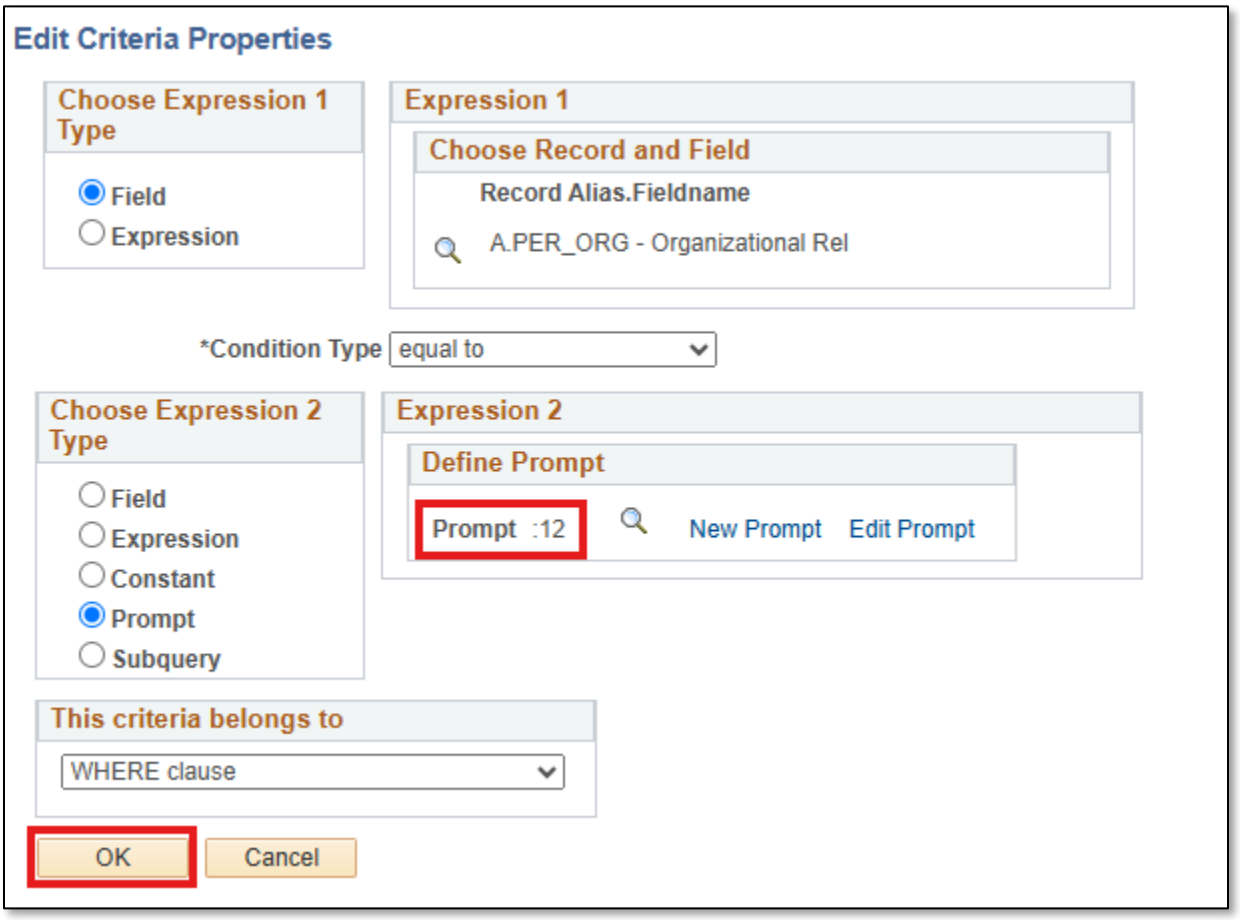
9. Ensure Condition Type is equal to. Select **Prompt** in Expression 2 and click the **magnifying glass** to select the PER_ORG prompt.



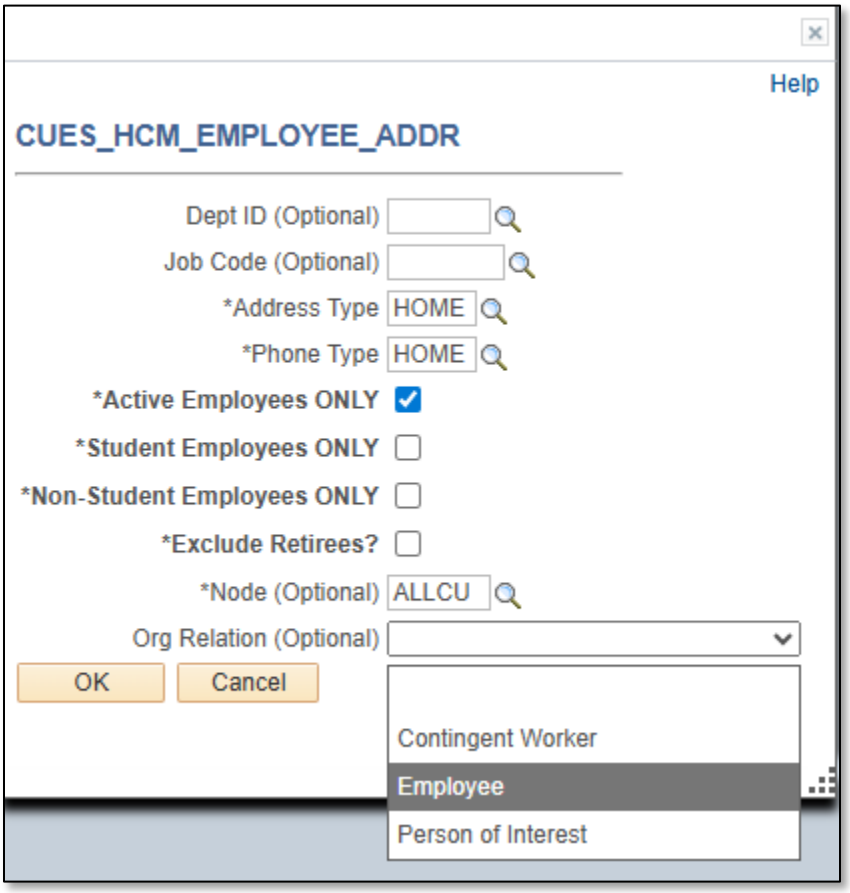
10. Select the **PER_ORG** prompt.



11. Once your prompt is defined in Expression 2, click **OK**.



12. When executing the query, the new prompt will display.


Help
CUES_HCM_EMPLOYEE_ADDR
Dept ID (Optional)
Job Code (Optional)
*Address Type
HOME
*Phone Type
HOME
*Active Employees ONLY
*Student Employees ONLY
*Non-Student Employees ONLY
*Exclude Retirees?
*Node (Optional)
ALLCU
Org Relation (Optional)
OK
Cancel
Contingent Worker
Employee
Person of Interest