

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, Persons of Interest (POI) 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?

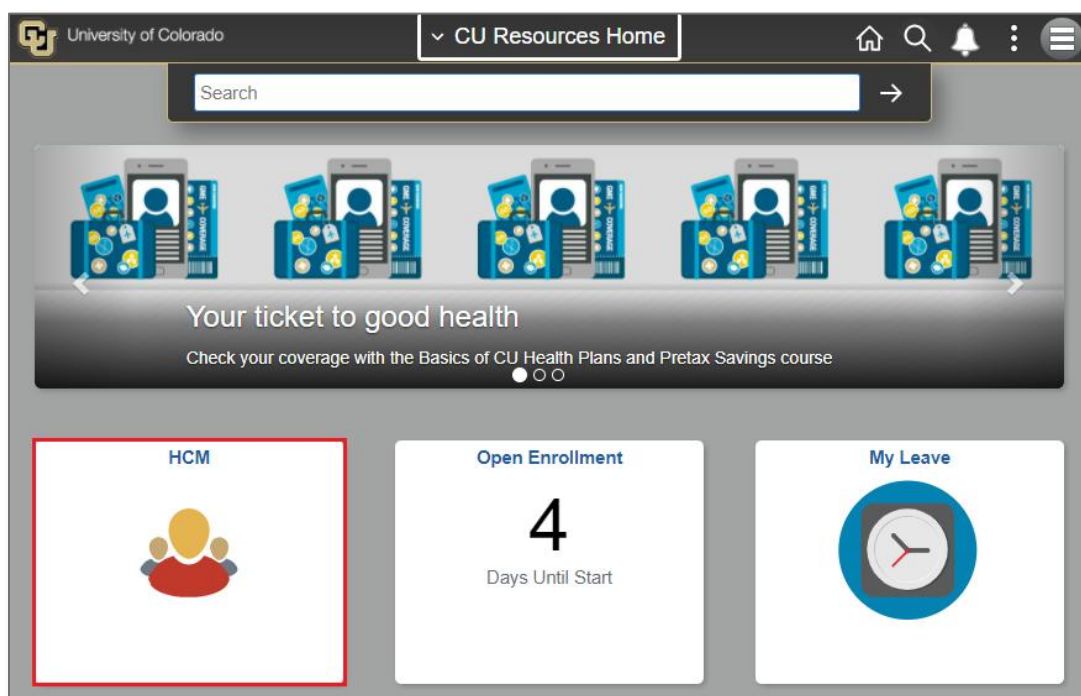
Any private reports in PeopleSoft Query or the CIW will need to be updated to include the PER_ORG field. Reports can be updated to display PER_ORG in the results, refined with filter criteria to limit the results to the correct population, or modified with a query prompt to allow the user to select the 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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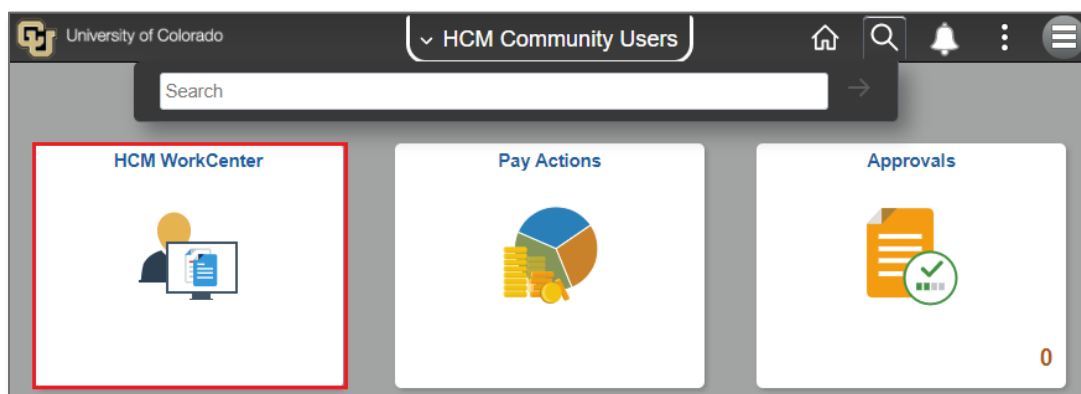
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Navigating and Searching PS Query

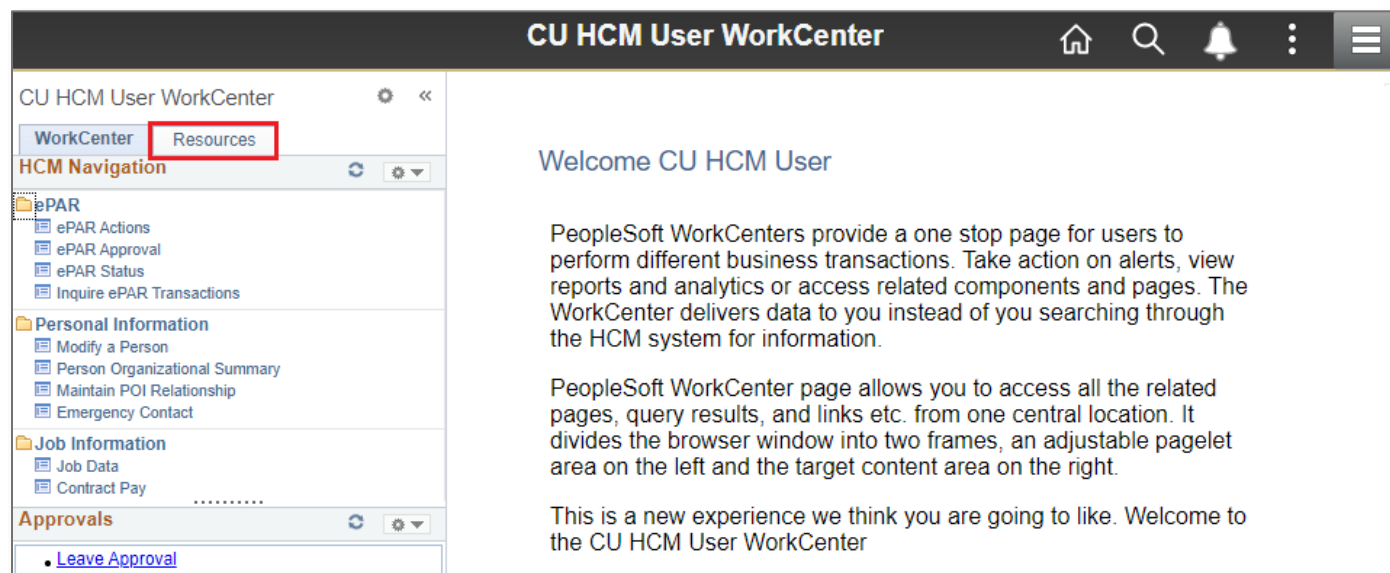
1. Log into the Employee Portal. Under the CU Resources Home drop-down menu, click on the **HCM** tile.



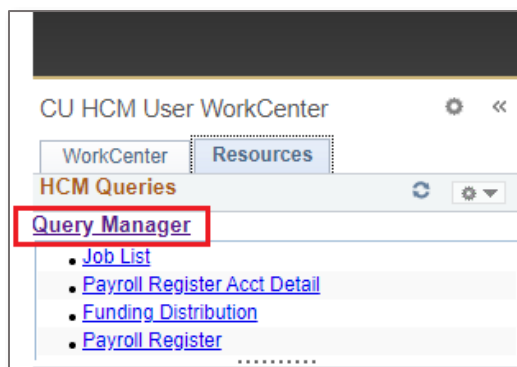
- Under the HCM Community Users drop-down menu, click on **HCM WorkCenter** tile. Your tile layout may be different than shown above/below.



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



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



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

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Query](#) | [Create New Query](#)

*Search By begins with

[Advanced Search](#)

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

Search Results

*Folder View

*Action

Query										Personalize	Find	View All	First	1 of 1	Last
Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References					
☐	CUES_HCM_EMPLOYEE_ADDR	Employee Address/Phone List	Public	CU_HCM	Edit	HTML	Excel	XML	Schedule	Lookup References					

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.

Records **Query** Expressions Prompts Fields Criteria Having Dependency Transformations View SQL Run

Query Name CUES_HCM_EMPLOYEE_ADDR Description Employee Address/Phone List

Working on selection Top Level of Query Subquery/Union Navigation

Click folder next to record to show fields. Check fields to add to query. Uncheck fields to remove from query. Add additional records by clicking the records tab. When finished click the fields tab.

Chosen Records

Alias	Record
 A	JOB - EE Job History

Check All Uncheck All

Fields Find | View 100 First 1-50 of 163 Last

☐	EMPLID - Empl ID	Join PERS_SRCH_GBL - Search - All Pers w/ an ERN	
☒	EMPL_RCD - Empl Record		
☒	EFFDT - Effective Date		
☐	EFFSEQ - Effective Sequence		
☒	PER_ORG - Organizational Relationship		
☒	DEPTID - Department	Join DEPT_TBL - Departments	
☒	JOBCODE - Job Code	Join JOBCODE_TBL - Job Codes	
☒	POSITION_NBR - Position Number		
☐	SUPERVISOR_ID - Supervisor ID		

Adding PER_ORG as a Filter in PS Query Reports

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

Records Query Expressions Prompts Fields **Criteria** Having Dependency Transformations View SQL Run

Query Name CUES_HCM_EMPLOYEE_ADDR Description Employee Address/Phone List Feed

Working on selection Top Level of Query Subquery/Union Navigation

Add Criteria Group Criteria Reorder Criteria

Logical	Expression1	Condition Type	Expression 2	Edit	Delete	Belongs to
	A.EFFDT - Effective Date	Eff Date <=	Current Date (EffSeq = Last)	Edit	-	
AND	B.EMPLID - Empl ID	equal to	A.EMPLID - Empl ID	Edit	-	
AND	C.DEPTID - Department	equal to	A.DEPTID - Department	Edit	-	
AND	C.EFFDT - Effective Date	Eff Date <=	Current Date	Edit	-	

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

Edit Criteria Properties

Choose Expression 1 Type

☒ Field
☐ Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname



*Condition Type equal to

Choose Expression 2 Type

☐ Field
☐ Expression
☒ Constant
☐ Prompt
☐ Subquery

Expression 2

Define Constant

Constant

This criteria belongs to

WHERE clause

OK Cancel

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.

Select a field

Select a record to show fields for

Personalize | Find |

First 1-8 of 8 Last

Alias	Record	Record Description	Show Fields
A	JOB	EE Job History	Show Fields
B	PERSONAL_DATA	PERSONAL_DATA for Rptng	Show Fields
C	DEPT_TBL	Departments	Show Fields
D	JOBCODE_TBL	Job Codes	Show Fields
E	ADDRESSES	Address Type	Show Fields
G	POSITION_DATA	Position Data	Show Fields
H	EMAIL_ADDRESSES	Email Addresses	Show Fields
F	PERSONAL_PHONE	Personal Data - Phone Numbers	Show Fields

Select a field

Personalize | Find | View 100 |

First 1-50 of 163 Last

A.EMPLID - Empl ID
A.EMPL_RCD - Empl Record
A.EFFDT - Effective Date
A.EFFSEQ - Effective Sequence
A.PER_ORG - Organizational Relationship
A.DEPTID - Department
A.JOBCODE - Job Code
A.POSITION_NBR - Position Number
A.SUPERVISOR_ID - Supervisor ID

- 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.

Edit Criteria Properties

Choose Expression 1 Type

☒ Field
☐ Expression

Expression 1

Choose Record and Field

Record Alias.FieldName

A.PER_ORG - Organizational Rel

*Condition Type equal to

Choose Expression 2 Type

☐ Field
☐ Expression
☒ Constant
☐ Prompt
☐ Subquery

Expression 2

Define Constant

Constant

This criteria belongs to

WHERE clause

OK

Cancel

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

Select A Constant

Values	Personalize	Find	View All	First	1-3 of 3	Last
Field Value	Translate Long Name	Translate Short Name	Select Constant			
CWR	Contingent Worker	Contingent	Select Constant			
EMP	Employee	Emp	Select Constant			
POI	Person of Interest	Person	Select Constant			

Cancel

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

Edit Criteria Properties

Choose Expression 1 Type

☒ Field
☐ Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname
A.PER_ORG - Organizational Rel

*Condition Type equal to

Choose Expression 2 Type

☐ Field
☐ Expression
☒ Constant
☐ Prompt
☐ Subquery

Expression 2

Define Constant

Constant EMP

This criteria belongs to

WHERE clause

OK **Cancel**

Adding PER_ORG as a Prompt in PS Query Reports

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

Records
Query
Expressions
Prompts
Fields
Criteria
Having
Dependency
Transformations
View SQL
Run

Query Name CUES_HCM_EMPLOYEE_ADDR
Description Employee Address/Phone List
Feed

Working on selection Top Level of Query
Subquery/Union Navigation

Add Prompt

Prompts List

Personalize | Find | |

First 1-11 of 11 Last

Prompt	Edit	Delete
:1 = DEPTID - Dept ID (Optional)	Edit	
:2 = JOBCODE - Job Code (Optional)	Edit	
:3 = ADDRESS_TYPE - Address Type	Edit	
:4 = PHONE_TYPE - Phone Type	Edit	
:5 = Active Employees ONLY	Edit	
:6 = PAY_END_DT - Pay Period Between	Edit	
:7 = PAY_END_DT - Pay Period End	Edit	
:8 = Student Employees ONLY	Edit	
:9 = Non-Student Employees ONLY	Edit	
:10 = Exclude Retirees?	Edit	
:11 = TREE_NODE - Node (Optional)	Edit	

Save

Save As

New Query

Preferences

Properties

Publish as Feed

Publish as Pivot Grid

New Union

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

Edit Prompt Properties

Field Name 

*Heading Type: Text

*Type: Character

*Format: Upper

Length: 11

Decimals:

*Unique Prompt Name: BIND12

*Edit Type: No Table Edit

Prompt Table 

☐ Optional

Default Value:

OK Cancel

3. Search Fieldname of **PER_ORG**.

Select a Prompt Field

Search by: Fieldname begins with

PER_ORG

Search Cancel No Value

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

Select a Prompt Field

Search by Fieldname begins with

Search Results

Select a Prompt Field	Personalize P
PER_ORG	
PER_ORG_BOX	
PER_ORG_DESCR	
PER_ORG_DESCRSHORT	
PER_ORG_EMP	
PER_ORG_FFO	
PER_ORG_POI	
PER_ORG_SEQ	
PER_ORG_VALID	
PER_ORG_CWR	
PER_ORG_SUMM	
PER_ORG_SUMM_LNK	

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.

Edit Prompt Properties

Field Name PER_ORG

*Type: Character

*Format: Upper

Length: 3

Decimals:

*Heading Type: Text

Heading Text: Org Relation (Optional)

*Unique Prompt Name: BIND12

*Edit Type: Translate Table

☒ Optional

Default Value:

OK Cancel

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

Records Query Expressions Prompts Fields **Criteria** Having Dependency Transformations View SQL Run

Query Name: CUES_HCM_EMPLOYEE_ADDR Description: Employee Address/Phone List

Working on selection: Top Level of Query

Add Criteria Group Criteria Reorder Criteria

Feed Subquery/Union Navigation

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

Edit Criteria Properties

Choose Expression 1 Type

☒ Field
☐ Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname



*Condition Type equal to

Choose Expression 2 Type

☐ Field
☐ Expression
☒ Constant
☐ Prompt
☐ Subquery

Expression 2

Define Constant

Constant 

This criteria belongs to

WHERE clause

OK

Cancel

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

Select a field

Help

Select a record to show fields for

Personalize

Find

First

1-8 of 8

Last

Alias	Record	Record Description	Show Fields
A	JOB	EE Job History	Show Fields
B	PERSONAL_DATA	PERSONAL_DATA for Rptng	Show Fields
C	DEPT_TBL	Departments	Show Fields
D	JOBCODE_TBL	Job Codes	Show Fields
E	ADDRESSES	Address Type	Show Fields
G	POSITION_DATA	Position Data	Show Fields
H	EMAIL_ADDRESSES	Email Addresses	Show Fields
F	PERSONAL_PHONE	Personal Data - Phone Numbers	Show Fields

Select a field

Personalize

Find

View 100

First

1-50 of 163

Last

A.EMPLID - Empl ID

A.EMPL_RCD - Empl Record

A.EFFDT - Effective Date

A.EFFSEQ - Effective Sequence

A.PER_ORG - Organizational Relationship

A.DEPTID - Department

A.JOBCODE - Job Code

A.POSITION_NBR - Position Number

A.SUPERVISOR_ID - Supervisor ID

A.HR_STATUS - HR Status

A.APPT_TYPE - Appointment Type

A.MAIN_APPT_NUM_JPN - Main Appointment Number

A.POSITION_OVERRIDE - Override Position Data

A.POSN_CHANGE_RECORD - Position Management Record

A.EMPL_STATUS - Payroll Status

A.ACTION - Action

A.ACTION_DT - Action Date

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

Edit Criteria Properties

Choose Expression 1 Type

☒ Field
☐ Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname

A.PER_ORG - Organizational Rel

*Condition Type equal to

Choose Expression 2 Type

☐ Field
☐ Expression
☐ Constant
☒ Prompt
☐ Subquery

Expression 2

Define Prompt

Prompt New Prompt Edit Prompt

OK Cancel

10. Select the **PER_ORG** prompt.

Select a Prompt

Help

Select a Prompt Personalize Find First 1-12 of 12 Last

:1 = DEPTID - Dept ID (Optional)
:2 = JOBCODE - Job Code (Optional)
:3 = ADDRESS_TYPE - Address Type
:4 = PHONE_TYPE - Phone Type
:5 = Active Employees ONLY
:6 = PAY_END_DT - Pay Period Between
:7 = PAY_END_DT - Pay Period End
:8 = Student Employees ONLY
:9 = Non-Student Employees ONLY
:10 = Exclude Retirees?
:11 = TREE_NODE - Node (Optional)
:12 = PER_ORG - Org Relation

Cancel

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

Edit Criteria Properties

Choose Expression 1 Type

☒ Field
 ☐ Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname

A.PER_ORG - Organizational Rel

*Condition Type

equal to

Choose Expression 2 Type

☐ Field
 ☐ Expression
 ☐ Constant
 ☒ Prompt
 ☐ Subquery

Expression 2

Define Prompt

Prompt :12

New Prompt
 Edit Prompt

This criteria belongs to

WHERE clause

OK

Cancel

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