

CHRIS User Guide: Dated Information and Date Tracking

Introduction

Information in CHRIS is either “Dated” or “Date Tracked.” To use CHRIS you must understand these features, because you will use them with every action you process or record you view.

Glossary

Terms and Definitions	
Date Type	There are two date types: Dated and Date Tracked.
Date Type: <i>Dated</i>	Information about work structures is “Dated” information. All Dated information has <i>From</i> and <i>To</i> dates that identify when it is/was/will be in effect (the <i>To</i> date is always blank for current and future information). Previous versions are maintained in CHRIS history. Dated information includes the following: <ul style="list-style-type: none"> • Locations • Organizations • Jobs • Positions • Grades • Pay tables
Date Type: <i>Date Tracked</i>	Date Track is a feature that allows you to view, add, change, or delete information as of any particular date in time – past, present, or future. Through Date Track, a continuous history of information, and changes to records, are maintained. Date Tracked information includes the following: <ul style="list-style-type: none"> • Employees • Assignments • Compensation and Benefits
Date Track Effective Date: <i>Past Date</i>	Information Displayed and Used For Processing, Validation, and Reporting. This information is displayed as it was on that date.
Date Track Effective Date: <i>Current Date</i>	Information Displayed and Used For Processing, Validation, and Reporting. This information is displayed as it is today. If any action has already been input that has a future effective date, you will not see that action.
Date Track Effective Date: <i>Future Date</i>	Information Displayed and Used For Processing, Validation, and Reporting. This information includes any future dated actions (as of the Date Tracked date) that have already been input.
Effective Date	In CHRIS, <i>effective date</i> also refers to the point in time you identify for Date Tracking (the date of the snapshot of the record). To avoid confusion, this User Guide will generally use the term <i>Date Track</i>

	<i>Effective Date.</i>
Update	An <i>update</i> is a change to a record where the previous information was valid up until the date of the update. When you <i>update</i> a record, all <u>previous information is preserved</u> , and can be viewed using Date Track History.
Correction	A <i>correction</i> is a change to a record where the previous information was incorrect. When you <i>correct</i> a record, the new (correct) information <u>overrides previous information</u> that was incorrect (back to the date the error occurred). After the correction, if you view the record in Date Track History, the correct information will display even during the period of time where the incorrect information was displayed (and related data fields will have been adjusted accordingly).

Guide Contents

Information in this guide describes how associates can view, add, change, or delete information as of any particular date in time – past, present, or future. The way information is Dated and Date Tracked provides a powerful tool for maintaining a continuous history of information. This guide addresses both Dated and Date Tracked information.

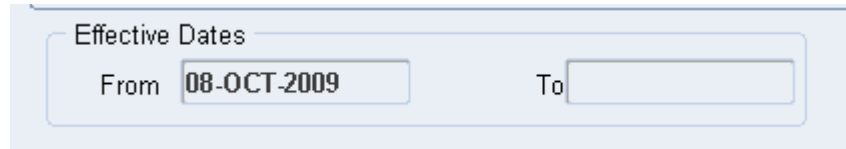
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DATED INFORMATION

Information about locations, organizations, jobs, positions, grades, pay tables, and other work structures is **Dated** information.

All Dated information has a **From** and **To** date that identifies when it was/is/will be in effect.

Example:



The image shows a screenshot of a web form titled "Effective Dates". It contains two input fields: "From" and "To". The "From" field is populated with the date "08-OCT-2009". The "To" field is currently empty.

From and To Dates

You enter the “**From**” date when you enter Dated information. It is the date when the information becomes effective or valid.

Example: When you build a position, you enter a “**From**” date to indicate the date that particular position starts.

The “**To**” date (end date) is entered when you no longer want the information to be used after that date. It is the date the information becomes ineffective or invalid.

Example: When you build a temporary position you would enter a “**To**” date (end date), after which, the position is no longer valid.

History

All dated information will be maintained in the database, to keep a history over time

UNDERSTANDING DATE TRACK – The information you see in CHRIS, and the information used for any processing, validation, and reporting is based on the Date Track Effective Date.

How It Works:

Information on employees, assignments, and compensation and benefits is **Date Tracked**. Date Track is a feature that allows you to view, add, change, or delete information as of any particular date in time – past, present, or future.

When you are in CHRIS, you can set a **Date Track Effective Date** in the past or future. You can then view or edit information as of that date. Date Track ensures that only information effective on that Date Track date is used for any processing, validation, and reporting actions.

Through Date Track, a continuous history of information, and changes to records, is maintained. You can use Date Track History to view a report of every update ever made to a record. When you make a change, you can choose whether it is a correction to the last update or a new update to be recorded in the history of the record

When you enter information in the Extra Information for Assignment, Position, and Person, the information is always a new update. The Date Track History report does not show a history of changes you've made to the information stored in these flex-fields. You can enter date tracked information or make changes to it at any time.

When you are new to Date Track, you may find it useful to be reminded of your effective date whenever you open a window that contains date tracked information. The reminder appears in a Decision window and asks whether you want to change your effective date. If you choose "Yes", the Alter Effective Date window opens.

Business Rule

It is important to understand the following CHRIS business rule related to Date Tracked information:

You cannot create a record and update it on the same day.

Example: You cannot hire an employee on the same day you accept him or her as an applicant, and you cannot hire an employee unless he or she has been first entered as an applicant.

This is because Date Track maintains records entered for a minimum of one day. A person can only be one person type a day (*applicant, employee, ex-employee*).

Work Around:

You can process both actions on the same workday if you alter the Date Track Effective Date so that the two events are effective in the system on different days.

Example: You can alter the Date Track Effective Date to a past date to enter the applicant; then alter the date again to the present date to hire the applicant.

Date Track Buttons and Menu Items

Below are the Date Track Toolbar buttons and the Main Menu Bar items related to the Date Track functions. Explanations of when and how you use these functions are contained in the pages that follow.



Toolbar Button: Alter Effective Date button:
Main Menu: Tools → Alter Effective Date



Toolbar Button: Date Track History button:
Main Menu: Tools → Date Track History

Date Security

Your ability to alter the effective date is based on your user responsibility and access privileges. There are four access levels for Date Track.

Access Level: *All*

Privileges: Can change to any other effective date.

Access Level: *Future*

Privileges: Can change between today's date and any future date.

Access Level: *Past*

Privileges: Can change between today's date and any past dates.

Access Level: *Present*

If you are altering the date to make retrospective or future-dated changes, you need to follow these steps before you enter the changes.

ALTERING THE DATE TRACK EFFECTIVE DATE

Step 1



Click the Alter Effective Date button on the Toolbar.

Or

Click **Tools** → **Alter Effective Date...** from the Main Menu Bar.



The **Alter Effective Date** Window opens:



Step 2

Type in the date manually in the **Effective Date** field

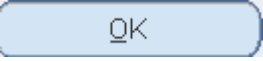
Or



Use the calendar by clicking the LOV to enter a new effective date.

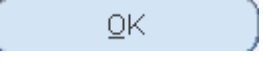


Step 3

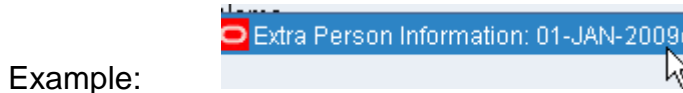
Click the OK  button.

Note: When you are operating in a Date Track Effective Date that is different from the current date, the Date Track Effective Date will be displayed in the Title Bar of every window.



Click the OK  button.

Note: When you are operating in a Date Track Effective Date that is different from the current date, the Date Track Effective Date will be displayed in the Title Bar of every window.



Cautions

When you alter the *Date Track Effective Date*, it is important to remain aware of the date in which you are working, and to reset it as appropriate. Below are some cautions.

- If your current window is a “top-level” window (one that is accessed directly from the **Navigation List**), the new Date Track Effective Date remains in place until you reset it or exit CHRIS.
- If your current window is not a “top-level” window, the new Date Track Effective Date only applies while you are working in the current window and any windows subsidiary to it. When you return to a top-level window, your Date Track Effective Date is reset to the previous value.
- In some cases, when you alter the effective date on a subsidiary window, CHRIS returns you to the previous window, and you may have to re-query the records you want to view or update.
- If you are Date Tracked in an RPA, once you leave the RPA your Date Track will reset to the current date.

VIEWING DATE TRACKED INFORMATION AND HISTORY

CHRIS maintains a continuous record of changes made to Date Tracked information. You can:

View record information for a particular date (snapshot in time).

Or

View all of the changes to a record over time (a full history).

Viewing Information as of a Particular Date

When you view a record in a window that contains Date Tracked information (e.g., the **People** → **Enter and Maintain** Window), you will see a snapshot of information as of the Date Track Effective Date in which you are operating. This is either the current date or the date you set by using the Alter Effective Date function.

The procedures below outline how to view information as of a particular date and explain the Effective Dates region

Step 1

To set your Date Track Effective date, use the current date,

Or

Follow the procedures in *Altering the Date Track Effective Date* to select a past or future date.

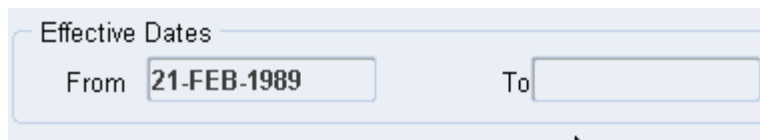
Step 2

Retrieve the record or records you wish to view.

Step 3

Review the Effective Date region in the window:

Example:



The image shows a screenshot of a software window titled "Effective Dates". It contains two input fields: "From" and "To". The "From" field is populated with the date "21-FEB-1989". The "To" field is empty. The entire region is enclosed in a light blue border.

This Effective Date region shows you the dates between which the information in the snapshot is valid.

If there is no **“To”** date (end date), then there have been no changes to the date since the **“From”** date and there are no future dated changes.

If there is a **“To”** date, then the record was either deleted or changed the next day. To find out if the record continues to exist, you can use Alter Effective Date to set the Date Track date to the day after the **“To”** date, or use Date Track History.

Viewing the Date Track History of a Record

To see a history of all of the changes to a Date Tracked record over time, follow the procedures below

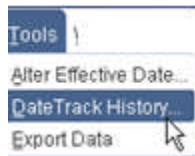
Step 1



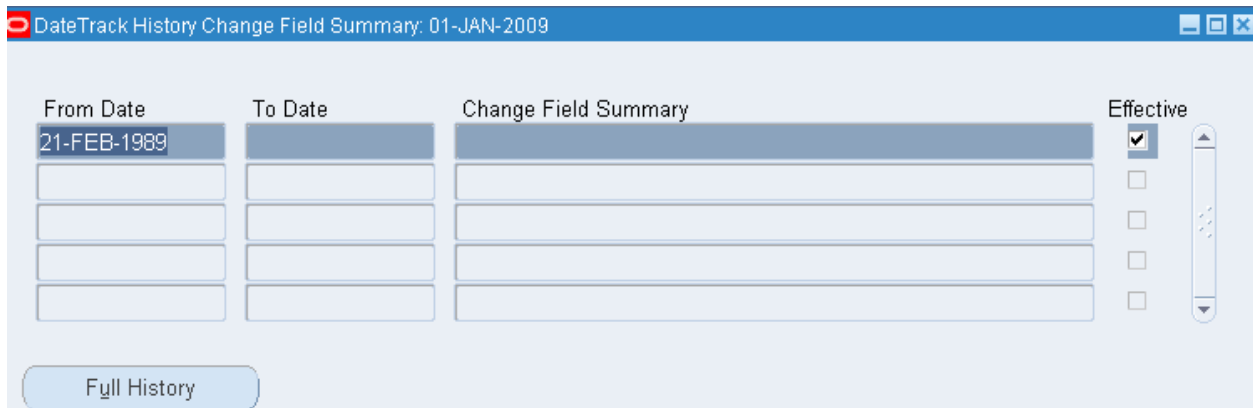
Click the Date Track History button on the Toolbar.

Or

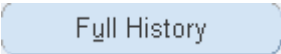
Click **Tools** → **Date Track History...** from the Main Menu Bar.

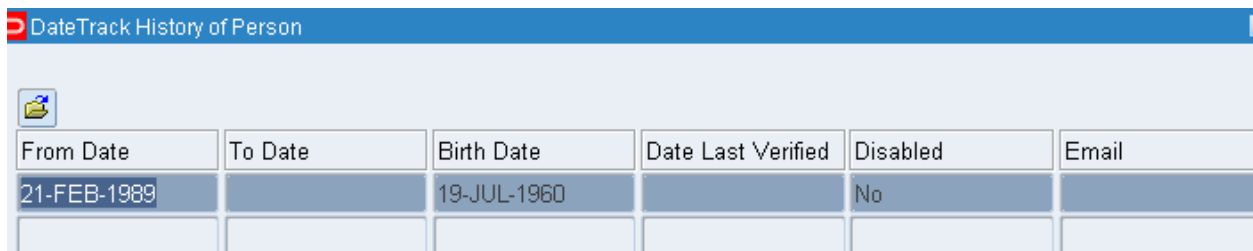


The **Date Track History Change Field Summary** Window opens. Each row shows which data fields were changed, and the corresponding **From Date**.



Step 2

Click the Full History  button if you want to open a Date Track History folder showing the value of each data field between the effective dates. The row for the current snapshot (corresponding to the effective date you are working in) is highlighted.



UPDATING AND CORRECTING DATE TRACKED INFORMATION

When a change to Date Tracked information has occurred, you are prompted to choose between **Update** and **Correction**

Term: *Update*

Definition:

An *update* is a change to a record where the previous information was valid up until the date of the update. When you *update* a record, all previous information is preserved, and can be viewed using Date Track History.

Term: *Correction*

Definition:

A *correction* is a change to a record where the previous information was incorrect.

Caution: When you *correct* a record, the new (correct) information overrides previous information that was incorrect (back to the date the error occurred). After the correction, if you view the record in Date Track History, the correct information will display even during the period of time when the information was incorrect (and related data fields will have been adjusted accordingly).

Updating and Correcting Information

You cannot create a record and then update it on the same day. If you try to do this, CHRIS warns you that the old record will be overridden, and then changes Update to Correction. This is because Date Track maintains records for a minimum of a day at a time.

Step 1



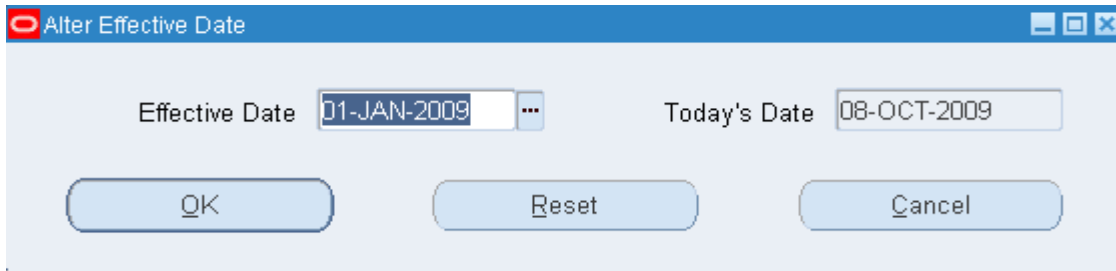
Click the Alter Effective Date button on the Toolbar.

Or

Click **Tools** → **Alter Effective Date...** from the Main Menu Bar.



The **Alter Effective Date** Window opens:



Step 2

Type in the date manually in the **Effective Date** field


Or



Use the calendar by clicking the LOV  to enter a new effective date.

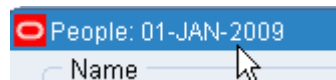


Step 3

Click the OK  button.

Note: When you are operating in a Date Track Effective Date that is different from the current date, the Date Track Effective Date will be displayed in the Title Bar of every window.

Example:



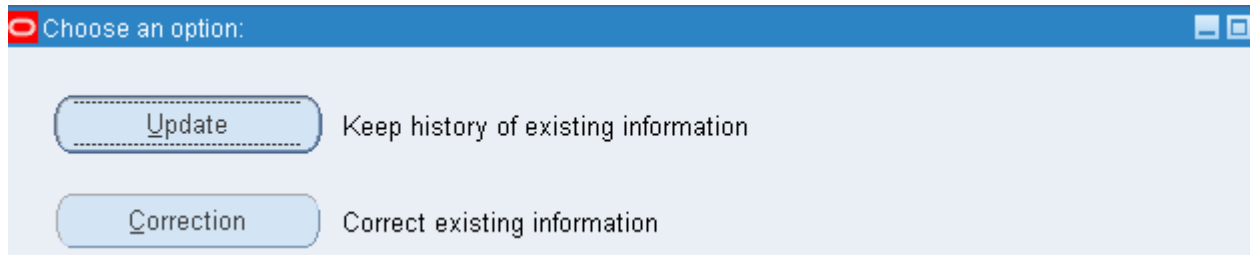
Step 4

Edit the data field(s) applicable to the update or correction:

Step 5



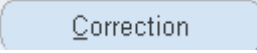
Click the Save button on the Toolbar. An option window opens:



Step 6

Click the Update  button.

Or

Click the Correction  button.

Step 7

If you are processing a correction, check to see if there is an end date in the Effective Date region of the record. **If there is an end date**, you have only updated the first snapshot of the record. So....

- Alter the Effective Date to the day after the end date and make the correction again.
- Repeat this procedure until the “**To**” data field is blank, indicating that you have reached the last snapshot of the record.