

Dated Information and DateTracking

Introduction

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

You can view, add, change, or delete information as of any particular date in time – past, present, or future. The way information is dated and DateTracked provides a powerful tool for maintaining a continuous history of information.

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Terms

This chapter addresses both Dated and DateTracked information

Date Type: *Dated*

Definition:

Information about work structures is “Dated” information. All Dated information has **From** and **To** dates that identify when it is/was/will be in effect (the **To** date is always blank for current and future information). Previous versions are maintained in CHRIS history. Dated information includes the following:

- Locations
- Organizations
- Jobs
- Positions
- Grades
- Pay tables

Date Type: *DateTracked*

Definition:

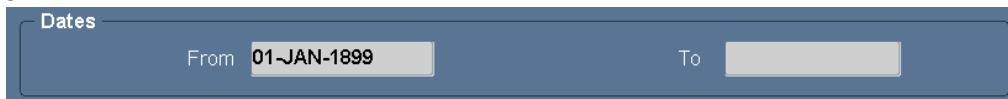
DateTrack is a feature that allows you to view, add, change, or delete information as of any particular date in time – past, present, or future. Through DateTrack, a continuous history of information, and changes to records, are maintained.

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 software interface for selecting date ranges. It features a blue header bar with the word "Dates" on the left. Below the header, there are two input fields. The first field is labeled "From" and contains the text "01-JAN-1899". The second field is labeled "To" and 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 DATETRACK

How It Works:

Information on employees, assignments, and compensation and benefits is ***DateTracked***. DateTrack 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 ***DateTrack Effective Date*** in the past or future. You can then view or edit information as of that date. DateTrack ensures that only information effective on that DateTrack date is used for any processing, validation, and reporting actions.

Through DateTrack, a continuous history of information, and changes to records, is maintained. You can use DateTrack 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 DateTrack History report does not show a history of changes you've made to the information stored in these flexfields. You can enter datetracked information or make changes to it at any time.

When you are new to DateTrack, you may find it useful to be reminded of your effective date whenever you open a window that contains datetracked 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.

Terms

To understand DateTracking, you need to understand the following terms:

Effective Date - In CHRIS, *effective date* **also** refers to the point in time you identify for DateTracking (the date of the snapshot of the record). To avoid confusion, this Users Guide will generally use the term *DateTrack Effective Date*.

Update - 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 DateTrack History.

Correction - A *correction* is a change to a record where the previous information was incorrect. 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 DateTrack 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).

Data Display and Use in DateTrack

The information you see in CHRIS, and the information used for any processing, validation, and reporting, is based on the DateTrack Effective Date you are working in:

DateTrack Effective Date: *Past Date*

Information Displayed and Used For Processing, Validation, and Reporting:

Information as it was on that date.

DateTrack Effective Date: *Current Date*

Information Displayed and Used For Processing, Validation, and Reporting:

Information as it is today. If any action has already been input that has a future effective date, you will not see it.

DateTrack Effective Date: *Future Date*

Information Displayed and Used For Processing, Validation, and Reporting:

Information that includes any future dated actions (as of the DateTracked date) that have already been input.

DateTrack Buttons and Menu Items

Below are the DateTrack Toolbar buttons and the Main Menu Bar items related to the DateTrack 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: DateTrack History button:
Main Menu: **Tools** → **DateTrack History**



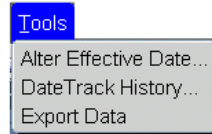
ALTERING THE DATETRACK EFFECTIVE DATE

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  button.

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

Example: 

Click the  button.

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

Example: 

Cautions

When you alter the *DateTrack 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.

Cautions:

- If your current window is a “top-level” window (one that is accessed directly from the **Navigation List**), the new DateTrack Effective Date remains in place until you reset it or exit CHRIS.
- If your current window is not a “top-level” window, the new DateTrack 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 DateTrack 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 DateTracked in an RPA, once you leave the RPA your DateTrack will reset to the current date.

VIEWING DATETRACKED INFORMATION AND HISTORY

CHRIS maintains a continuous record of changes made to DateTracked 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 DateTracked information (e.g., the **People** → **Enter and Maintain** Window), you will see a snapshot of information as of the DateTrack 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

Set your DateTrack Effective date. Use the current date,

Or

Follow the procedures in *Altering the DateTrack 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:



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 DateTrack date to the day after the **To** date, or use DateTrack History.

Viewing the DateTrack History of a Record

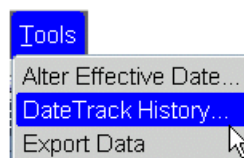
To see a history of all of the changes to a DateTracked record over time, follow the procedures below

Step 1

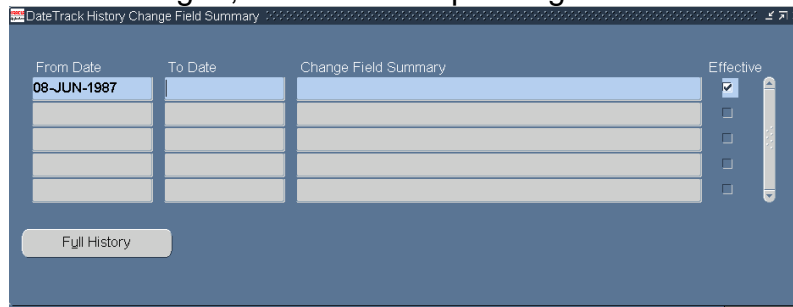
Click the DateTrack History button  on the Toolbar.

Or


Click **Tools** → **DateTrack History...** from the Main Menu Bar.

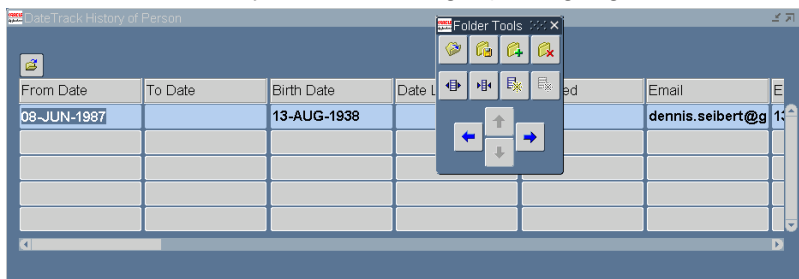


The **DateTrack History Change Field Summary** Window opens. Each row shows which data fields were changed, and the corresponding **From Date**.



Step 2

Click the  button if you want to open a DateTrack 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.



You can use the **Folder Tools** to select and arrange the data fields to view the DateTrack History in a Person folder. (for more information on Folders see Chapter 8).

UPDATING AND CORRECTING DATETRACKED INFORMATION

When a change to DateTracked 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 DateTrack 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 DateTrack 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

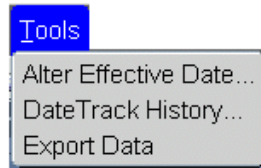
You cannot create a record and then update it on the same day. If you try to do this, CHRIS warns you that the old record will be overridden, and then changes Update to Correction. This is because DateTrack maintains records for a minimum of a day at a time.

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  button.

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

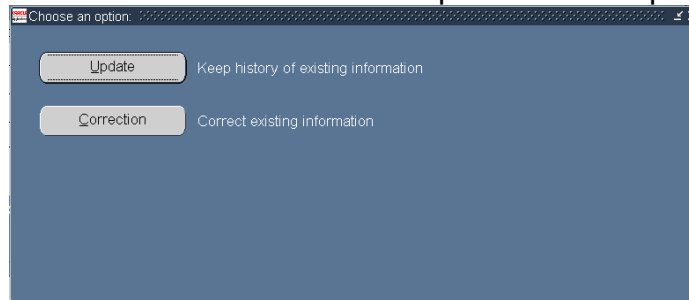
Example: 

Step 4

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

Step 5

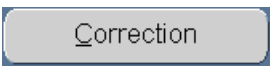
Click the Save button  on the Toolbar. An option window opens:



Step 6

Click the  button.

Or

Click the  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.

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