

# Colorado State University

## Human Resource Management System User Guide

---

Unit 0: Introduction

---

Unit 1: HRMS Basics

---

### **Unit 2: DateTracking**

---

Unit 3: Hiring a New Employee

---

Unit 4: Electronic Approvals

---

Unit 5: Maintaining Existing Employees

---

Unit 6: Summer Session Appointments

---

Unit 7: Labor Scheduling

---

Unit 8: Time Entry and Timeclocks

---

Unit 9: Performance Evaluation Module

---

Unit 10: Leave Module

---

Unit 11: User Reports

---

Unit 12: Associates

---

Appendix

## Unit 2: DateTracking

<b>What is DateTracking? .....</b>	<b>2.1</b>
<b>Choosing Between Update and Correction .....</b>	<b>2.2</b>
<b>Setting the Effective Date .....</b>	<b>2.3</b>
<b>Viewing DateTracked Information and History .....</b>	<b>2.4</b>

---

### *What is DateTracking?*

Most employee information in the HR system is dated information. All dated information has From and To dates, which indicate the period during which the information is effective. This dynamic, dated information is DateTracked. DateTracking allows you to maintain a continuous history of employee information.

You can enter DateTracked information or make changes to it at any time. When reviewing, entering, changing, or deleting DateTracked data, your effective date can be in the past, present, or future. DateTrack ensures that only information effective on that day is used for any processing, validation, and reporting you carry out.

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. DateTrack History enables you to view a history of every update made to an employee record.

Certain fields (such as Organization, Job, Grade, Position, Salary, Appointment End Date, Assignment Status, Hours per Week, People Group Qualifier) require approval when a change is made. These changes must be made using the CSU Assignment Changes form (explained in Unit 5), rather than simply changing the data on the screen where it exists.

Each time you change a DateTracked field that does not require approval, you will be prompted to choose between making an Update or a Correction. If you choose Update, the HR system changes the record starting on your effective date and preserves the previous information. If you choose Correction, the HR system overrides the previous information with your new changes. The start and end dates of the record you have corrected remain the same.

---

### *Choosing Between Update and Correction*

After changing data in a DateTracked field (such as any field on the Assignment screen), you will be prompted to choose between Update and Correction.

If you are changing or entering information on a new assignment, **always** choose Correct. To change information on an approved assignment, you must use the CSU Assignment Changes Screen (see Unit 5).

If you are correcting data on the People screen that was entered incorrectly when the employee was hired, choose Correct. DateTrack History will not indicate that a different value existed for this field in the past.

If the information on the People screen has changed since the hire date (marital status, for example), DateTrack to the date of change before entering the new data and afterward, select Update. DateTrack History will keep a record of the old value, the new value, and the date that the information changed.

You cannot create a new record and Update it effective on the same date. DateTrack maintains records for a minimum of one day. If you try to do an Update on the same day, the HR system will alert you that the old record will be overwritten and will change your Update to a Correction.

You can make an unlimited number of Corrections on the effective start date of the record.

#### **Example of Correction**

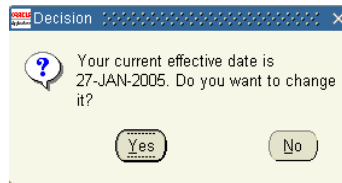
If you hired an employee named Simon Moe one week ago and today discover that you entered an incorrect marital status for him, you would **correct** Simon's status by entering the correct value and then choosing Correction. By choosing Correction, you're changing the record all the way back to the day of hire.

#### **Example of Update**

If existing employee Susan Kay got married last week, you **update** Susan's information by setting your effective date to the date of her wedding and entering her new marital status on the People screen. By choosing Update, you change her record to reflect her new marital status, but her previous personal information remains in her record.

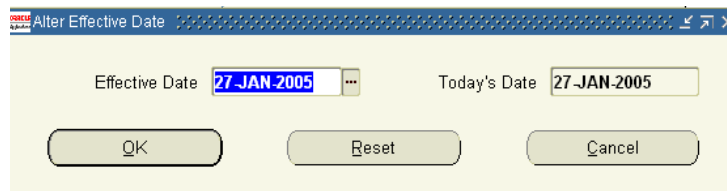
## Setting the Effective Date

When you log into HR, the effective date defaults to today's date. To view past- or future-dated changes, you must change your effective date. Upon entering most DateTracked screens, a decision box displays the current effective date and asks whether you want to change the effective date. If you choose No, the effective date will remain as it is displayed in the Decision box. If you choose Yes, the Alter Effective Date window displays.



To change the effective date:

1. Click **Yes** in the decision box above.
2. When the **Alter Effective Date** window displays, enter a new effective date and click **OK** (or press **Enter**).



When the effective date is different from today's date, it is displayed in the title bar of every window.



If the current window is a top-level window (one called directly from the Navigator menu), the new effective date remains in place until it is reset or until the HR system is closed. If the current window is not a top-level window (such as the Assignment window which is opened from the People screen), the new effective date applies only while working in the current window and any windows related to it. When you return to the top-level window, the effective date resets to its previous value.

You can also use the DateTrack icon in the toolbar to change the effective date:

1. **Save any outstanding changes.**

2. Click the DateTrack button on the toolbar.



3. When the Alter Effective Date window displays, enter a new effective date and click OK (or press Enter).

## Viewing DateTracked Information and History

DateTracking allows Oracle to maintain a continuous record of changes to data. You can view changes to records over time. When you view a record in a DateTracked window, you are looking at a snapshot of the information based on your effective date. The Effective Dates From and To fields on the DateTracked window indicate the dates between which the snapshot is valid.

Suppose you are viewing an assignment with an Effective From date of 01-JAN-1989 and no Effective To date. This means that the assignment was either created or last changed on January 1, 1989, and the snapshot information you are viewing is still valid. There have been no changes to the assignment since January 1, 1989, and there are no future-dated changes.

To find out whether the assignment existed prior to January 1, 1989, you can either change your effective date or use DateTrack History. If there is an Effective To date, it is understood that the record was either deleted or changed on the next day. To find out whether the record continues to exist, set your effective date to the day after the end date or use DateTrack History.

To see a summary of all the changes made to a DateTracked record over time, use DateTrack History:

1. Choose the DateTrack History icon from the Toolbar.



2. The DateTrack History Change Field Summary window displays. Each row shows which fields were changed on the From Date. (Not all fields, such as the beer mug fields, are included in the DateTrack History screens.)

From Date	To Date	Change Field Summary	Effective
27-JAN-2005		Marital Status	<input checked="" type="checkbox"/>
24-OCT-2001	26-JAN-2005		<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Full History

3. Click the **Full History** button to see the values of each field between each set of effective dates. The row for the current snapshot (corresponding to your effective date) is highlighted.

To view the screen and its data effective during one period:

1. Click the **Alter Effective Date** button on the **Toolbar**.



2. In the **Alter Effective Date** window, fill in the **Effective Date** field and click **OK**.
3. You will be returned to the previous screen which displays all the data that is valid for the **Effective Date** that you entered.