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Assignments: DateTracking

Overview

In this learning cycle, we will discuss the **Oracle DateTracking** function. This function allows users to alter the **Effective Date** when viewing information in employee records. A record has DateTrack capabilities if it has an Effective Dates region.

Some HRMS **data entry** responsibilities used by the Department of Human Resources allow the user to utilize DateTrack capabilities to update and correct records. When a record is DateTracked and a change is made and saved, the previous record is automatically end dated by the system.

The SIUC HRMS Department View responsibility does NOT allow the user to update or change records; however, it does allow you to use the DateTrack tool to VIEW changes made to a record.

Objectives

Upon completion of this Learning Cycle, you will be able to:

- Determine whether or not a form is DateTracked.

- Alter an Effective Date to view a change in an employee's record.

- Utilize the **DateTrack History Change Field Summary** window to view DateTrack History for an employee.

Navigation

- This learning cycle begins at the Assignment window. To display this window from the Navigator, select:
  SIU HRMS Department View → View Assignment

- Once in the application, use the **Find Person** window to query the needed employee's Assignment record. For training purposes, we queried on Employee #8138; the demonstration that follows illustrates some of the DateTrack tools available to review an employee record. We'll begin the review with the Effective Dates region.

Effective Dates Region

- If you used the demonstration employee ID, the Effective Dates region of this window, displays the **From** date as 01-AUG-2007.

- The **To** field appears to be blank; but, it is not. By default, on an Active Assignment, it is set to non-display, which Oracle refers to as the "End of Time" or "Infinity". If you could see the date here, it would be 31-DEC-4712. If there is an END date besides 31-DEC-4712, it will be displayed in the "To" field.

Invoking the DateTrack Function

- There are two ways to invoke DateTrack functions.
  - You can use the Tools menu to select a function or the corresponding icon on the Toolbar.
  - Two functions are available:
    Alter Effective Date...
    DateTrack History...

Alter Effective Date…

- When Alter Effective Date… is selected from the menu or using the Toolbar icon, a popup window displays that allows you to change the Effective Date for the Assignment record.

- Click the Alter Effective Date icon on the Toolbar; the Alter Effective Date window opens.

- Both fields, **Effective Date** and **Today's Date**, default to today's session date.

- Suppose we want to review the Assignment that was in effect on January 1, 2007.

- Click in the Effective Date field and manually enter the date; it must be entered in Oracle date format (DD-MMM-YYYY). This field is not case sensitive. Or, use the LOV indicator and Oracle's calendar to enter the date.
    - No changes are required for Today's Date field.

- Click **OK** to close the window; you will return to the Assignment window.

- Both the "From" and "To" fields are now populated; the assignment BEGAN on 26-JUL-2006 and was END dated on 18-MAY-2007.

- Notice the Window Title Bar; the DateTracked Effective Date is displayed there, as part of the title.
    - The date in the title bar serves as a reminder that all viewing in the system will reflect this date from this point, until we end today's session -- unless it is changed.

- At this time, we could continue to review other records using the 01-Jan-2007 Effective Date, or enter a different Effective Date, or return the system to today's session date.

Resetting DateTrack

- To return the system to today's session date, click the Alter Effective Date icon on the Toolbar.

- Click the **Reset** button

- Click **OK** to close the window.
    - Notice the DateTracked Effective Date is no longer displayed in the Window Title Bar.

DateTrack History...

During your review, it may become necessary to look at both past and future assignments for an employee. The DateTrack History function is useful for this purpose.

- When DateTrack History… is selected from the menu or using the toolbar icon, a window opens that allows you to see all the changes made to a datetracked record over time.

- Click the DateTrack History icon; the **DateTrack History Change Field Summary** window opens.

- All existing records are displayed showing which fields were changed.

- Each record contains:
    - The effective start date is displayed in the From Date field.
    - The end date is displayed in the To Date field.
        - If this field is blank, you can assume that is the latest Assignment.
    - Change Field Summary provides a description of the information and fields changed.
        - Use the Vertical Scroll Bar to the right of the record block to scroll through all the records displayed; just click and drag it.

Full History

- Clicking this button opens the **DateTrack History of Assignments** window.

- Each field is displayed as it exists in the various records for the Effective Dates shown; click and drag the Vertical Scroll Bar to view additional records in the folder.

- Select an Assignment record; use the Horizontal Scroll Bar to view all field values.

- If you review this window frequently, you may want to customize the layout of the Folder Block.
    - For instructions, refer to Unit 2 - Navigation, Module 7, Folders.

- This completes the DateTrack review. Close the DateTrack History of Assignments and the DateTrack History Change Field Summary windows using the **X** in the upper right corner of each window. Then click the **Close Form** icon on the Toolbar to return to the Application Navigator.