

PEOPLESOFT CAMPUS SOLUTIONS 8.9

Using Effective Dates

This section provides an overview of effective dates and discusses page action options and effective dates.

Understanding Effective Dates

PeopleSoft's effective-dating logic enables you to maintain an accurate history of information in the database. Effective dating allows you to store historical data, see changes in your data over time, and enter future data. For example, you may want to track several events in the career of Tom Sawyer: when he was hired, transferred, and promoted. By inserting rows of data based on his employee ID, and significant dates, you can build a job history.

When you enter new information that is related to existing data (in this case about an employee), such as a transfer or pay rate change, you do not want to lose or overwrite the data already stored in the database. To retain history, add a data row identified by the date when the information goes into effect: the *effective date*. You can use the information to look at what has happened up to now and plan for the future. The PeopleSoft system categorizes effective-dated rows into the following basic types:

Current	The data row with the date closest to—but not greater than—the system date. Only one row can be the current row.
History	Data rows that have effective dates earlier than the current data row.
Future	Data rows that have effective dates later than the system date.

Describing Page Action Options and Effective Dates

The types of actions that you can perform on rows of data depend on the data row type. When you retrieve, modify, or insert rows in a table, the Update/Display, Include History, and Correct History actions apply specific rules based on the effective date:

Note. Not all tables are effective-dated. The Include History and Correct History options only appear on pages that access effective-dated tables.

Action	Rule
Update/Display	Retrieves only current and future rows. You can change future rows but not current rows. You can also add a new current row.
Include History	Retrieves all rows. However, you can modify future rows only. You can also add a new current row.

Action	Rule
Correct History	Retrieves all rows and allows you to change or correct any row and insert new rows regardless of the effective date or sequence number. Note. This option is available only to users with the proper permission.

To see how these actions work together, take a look at four possible events in the career of employee Tom Sawyer, listed by effective date. Assume that today is February 1, 2005:

Effective Date	History	Current	Future
Hired: January 1, 1994	X	–	–
Transferred: January 1, 1996	X	–	–
Promoted: August 1, 2001	–	X	–
Expected termination: January 1, 2006	–	–	X

The action type that you select dictates whether you can access certain fields and what you can do with each type of row:

Action Mode	View	Change	Insert New Rows
Update/Display	Current, Future	Future only	Effective date greater than or equal to current row.
Include History	History, Current, Future	Future only	Effective date greater than or equal to current row.
Correct History	History, Current, Future	All existing rows	No effective date restrictions.

The page action buttons appear in the toolbar in the lower-right corner of any relevant pages. A shaded button indicates that the page is currently in that mode. For example, the CTI Agent Configuration page is currently in Correct History mode.

Sample page in Correct History mode

CTI Agent Configuration Phone Book Personalization

User ID: PTPORTAL

Agent Information		Find View All	First	1 of 1	Last
Effective Date:	<input type="text" value="05/12/2004"/>				
*Agent ID:	<input type="text" value="PORTAL"/>				
Agent Password:	<input type="password" value="*****"/>				
Queue:	<input type="text"/>				
*Configuration ID:	<input type="text" value="001"/>				
*Application User Name:	<input type="text" value="CISCO"/>				
Application User Password:	<input type="password" value="*****"/>				
CTI Client Signature:	<input type="text"/>				
*Trace Level:	<input type="text" value="0 - None"/>				

Save Return to Search Notify Add Update/Display Correct History

[CTI Agent Configuration](#) | [Phone Book](#) | [Personalization](#)

Update/Display Mode

When you select Update/Display, you can access only current and future rows; you cannot access history. Using the example, you can view only the current data, which is effective-dated August 1, 2001, and the future data, which is effective-dated January 1, 2006 (the employee's promotion and then the employee's termination).

You can also:

- Insert new rows with an effective date later than the date on the current row—after August 1, 2001.
- Change the future-dated row, effective-dated January 1, 2006, and change any additional rows that you insert with a date later than today, February 1, 2005 (assumed to be today's date).

If you insert rows with effective dates between August 1, 2001, and February 1, 2005, you cannot change them if you return to the page in Update/Display mode.

Include History Mode

Select Include History to view any of Tom Sawyer's job data, from his hire date to the day on which he will be fired. However, as with Update/Display, you can update only future-dated rows, effective-dated February 2, 2005, and on. You can also insert new rows with an effective date later than the current row—that is, any date after August 1, 2001.

Correct History Mode

Select Correct History to access all data rows. This mode enables you to view, change, and insert rows of data, regardless of the effective date. You can view and edit any of Tom Sawyer's job data, from his hire date to the day on which he will be fired. You can also insert new rows with any effective date.

Note. As you move between the Update/Display, Include History, and Correct History modes, the system prompts you to save your changes if necessary.