
Understanding Effective Dated Rows

Concept

PeopleSoft uses **effective-dated** rows to retain historical data, view data changes over time, and store future data. Three categories of effective-dated rows are used to accomplish this task:

- Current
 - Future
 - History
-

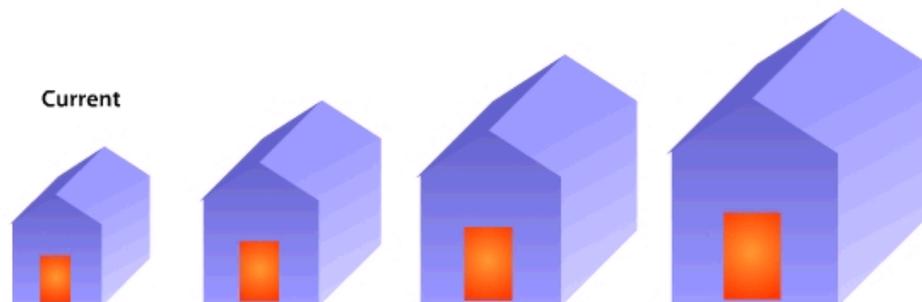
Additional information

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 John Smith: 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.

A **current** row of data within PeopleSoft displays the most up-to-date information available, or what is currently affecting a change to the data.

Current data row

John Smith got married on September 12, 1997. Human Resources inserted a data row in his record that indicated a change of status from single to married, effective September 12, 1997. If you were to access John's record today, the current row would show September 12, 1997. Unless John has a status change in the future, September 12, 1997 will remain his **current data row**.



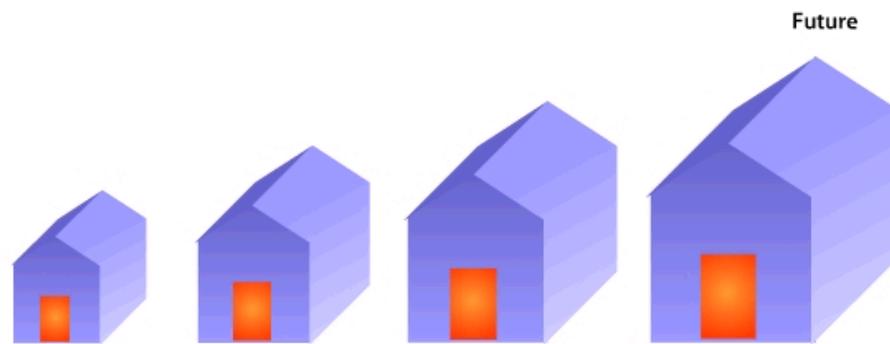
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Future data rows

Future rows of data are categorized as rows of data that have not yet taken effect. They are future transactions. If John had advised Human Resources of his wedding prior to the date of the event, a row could have been inserted with an effective date of September 12, 1997. Until the effective date passed, the row would remain in the system as future.

Future rows can eliminate paperwork stored for future transactions and avoid potential loss of records.



History data rows

The last category, **History**, is fairly self-explanatory. **History rows** are what current and future rows eventually become.

If John's marriage didn't work out and he got divorced, a row would be inserted to his status field indicating a divorce, with an effective date defined by John. The marriage date, which was the current row, would then become the history row.

History rows enable you to maintain an accurate online history of your data. This data can then be incorporated into reports or viewed online.



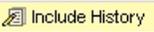
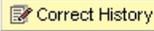
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Actions

Actions determine the rows of an effective-dated table that can be retrieved or modified. The table below displays the categories of effective-dated rows, along with the action types and associated page actions used online to retrieve, insert, or update effective-dated rows.

For example, you could click the **Update/Display** button to Retrieve the Current row and Insert a New Effective Date for the birth of John's new baby.

Page Action Symbol	Action Type	Rows to Retrieve	Rows to Insert	Rows to Update
 Add	Add	N/A	New high level key	N/A
 Update/Display	Update/Display	Current, Future	New EFFDT> Current Row EFFDT	Future only
 Include History	Update/ Display All	History, Current, Future	New EFFDT> Current Row EFFDT	Future only
 Correct History	Correction	History, Current, Future	Any EFFDT	All rows

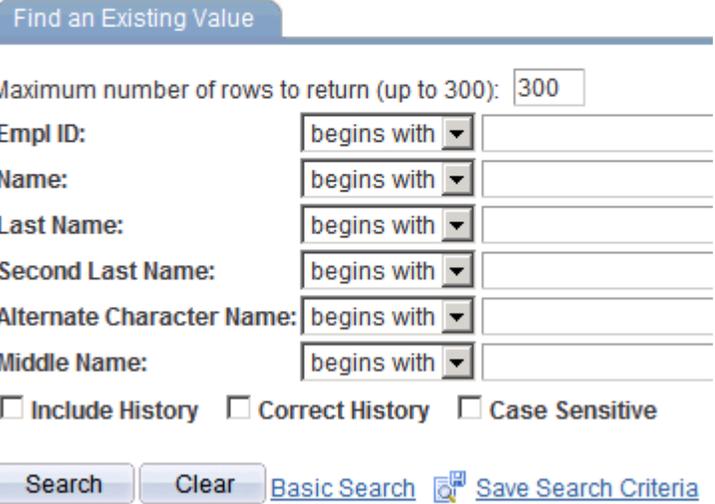
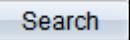
Example procedure

Now that you have an understanding of row categories, you can view some of them online using PeopleSoft.

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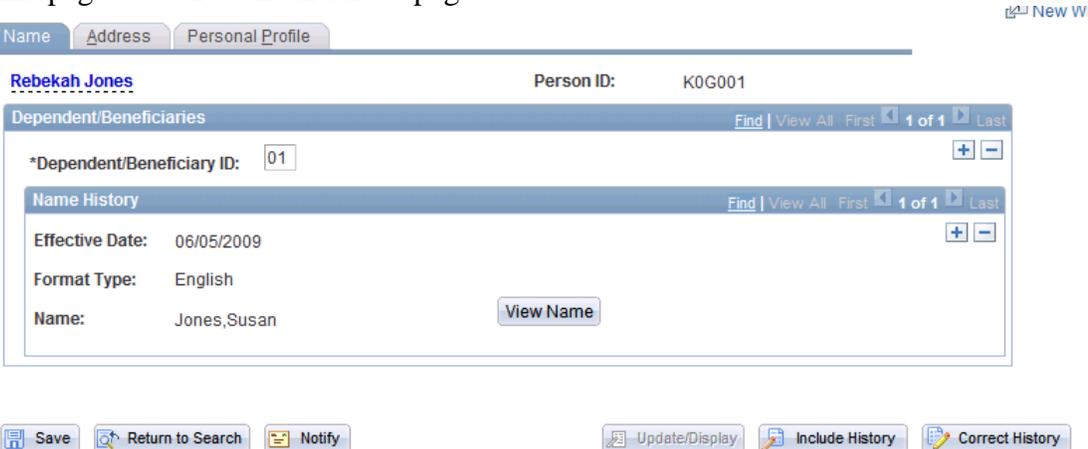
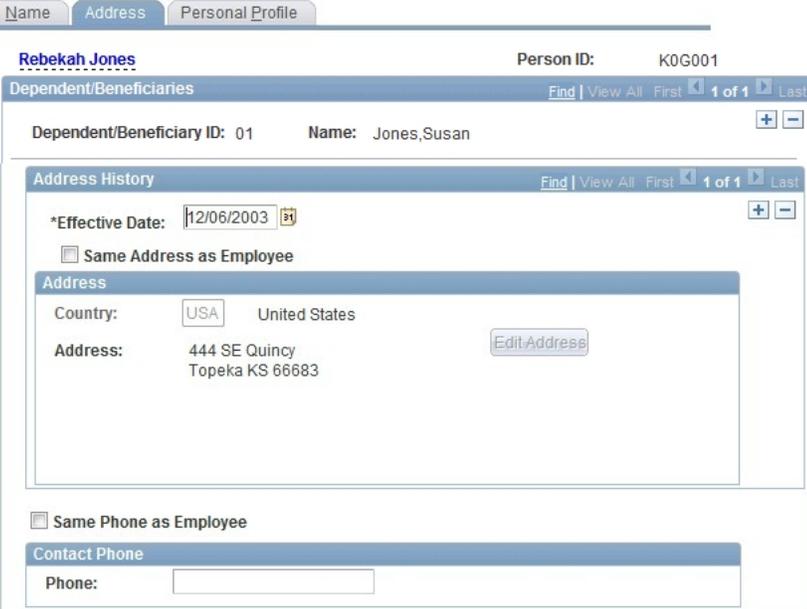
Example procedure (continued)

Step	Action
1	<p>Navigate to the Dependent Information page.</p> 
2	<p>The search page for the Dependent Information component is displayed. A search page with Include History and Correct History check boxes displayed indicates that you are accessing effective-dated data. You can access a history row from the search page or from within the page. If neither history box is selected, the Update/Display option is the default.</p> <p>Enter the desired information into the Empl ID field.</p> <p>Dependent Information</p> <p>Enter any information you have and click Search. Leave fields blank</p> 
3	<p>Click the Search button.</p> 

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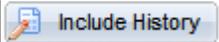
Example procedure (continued)

Step	Action
4	<p>The Name page of the component is displayed. There are effective-dated rows on this page as well as the Address page.</p> 
5	<p>Click the Address tab. Notice that there is one row listed for the Address History section. This is the current row of information.</p> 

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Example procedure (continued)

Step	Action
6	<p>This employee's dependent has moved several times in the past. In order to see this information, you need to look at the history rows of data.</p> <p>Click the Include History button.</p> 
7	<p>Notice that the scroll area now displays 1 of 3 between the scroll arrows.</p> 
8	<p>You are looking at the current address. When this information was entered in the table, the previous address information was stored as historic data. You want to view the previous addresses for this dependent.</p>  <p>Click the Next Row button.</p> 
9	<p>Notice the effective date on this page. This was the dependent's address in 1998.</p> 
10	<p>Click the Next Row button.</p> 

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Example procedure (continued)

Step	Action
11	<p>Now you can see where this dependent lived when the employee started with the organization in 1996.</p>  <p>In addition to using the scroll arrows to view multiple rows of data individually, you can use the View All function to view all of the rows together.</p>
12	<p>Click the View All link.</p> 

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Example procedure (continued)

Step	Action																
13	<p>View All displays the current row of data at the top of the page followed by the history rows. Also notice that View All has changed to View 1 in the scroll area. When displaying data using View All, you may need to use the vertical scroll bar to see multiple effective-dated rows.</p>  <p>The screenshot shows a table titled "Address History" with a navigation bar at the top right containing "Find View 1 First 1-3 of 3". The table contains three rows of data, each with an effective date, a checkbox for "Same Address as Employee", and an "Address" section with a country dropdown and an "Edit Address" button.</p> <table border="1"> <thead> <tr> <th>Effective Date</th> <th>Same Address as Employee</th> <th>Country</th> <th>Address</th> </tr> </thead> <tbody> <tr> <td>12/06/2003</td> <td><input type="checkbox"/></td> <td>USA United States</td> <td>444 SE Quincy Topeka KS 66683</td> </tr> <tr> <td>05/05/1998</td> <td><input type="checkbox"/></td> <td>USA United States</td> <td>555 Hill St. San Francisco CA 90841</td> </tr> <tr> <td>01/01/1996</td> <td><input type="checkbox"/></td> <td>USA United States</td> <td>123 NEW RD RANSOMVILLE NY 14001</td> </tr> </tbody> </table>	Effective Date	Same Address as Employee	Country	Address	12/06/2003	<input type="checkbox"/>	USA United States	444 SE Quincy Topeka KS 66683	05/05/1998	<input type="checkbox"/>	USA United States	555 Hill St. San Francisco CA 90841	01/01/1996	<input type="checkbox"/>	USA United States	123 NEW RD RANSOMVILLE NY 14001
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Example procedure (continued)

Step	Action
14	Click the View 1 link. 
15	You are returned to the last row that you were viewing before you clicked View All , in this case, the oldest address. You can scroll back, one page at a time, to the other data rows you were viewing by clicking the Previous Row arrow in the scroll area. However, if you wish to return to the current row immediately, you can simply click First in the scroll area. 
16	Click the First link. 
17	You have successfully practiced navigating through effective-dated rows and have seen how they are used within PeopleSoft. By using effective dates in relation to other fields, you can keep a chronological history of data within the system.