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## Oracle Basics

This guide will provide you with a list of tools for navigating within the HR System, data entry standards, toolbar icons, keyboard shortcuts and DateTracking.

### Keyboard Shortcuts

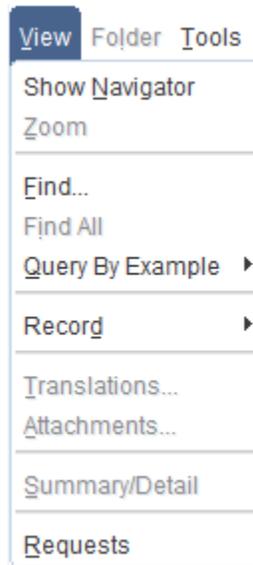
Many actions that can be performed with the mouse can also be accomplished using the function keys on the keyboard. The following is a list of keyboard shortcuts.

Key	Action
F4	Close Current Form
Ctrl-F4	Close Top Form
Shift-F5	Duplicate Field
F6	Delete Unsaved Record
Shift-F6	Duplicate Record
Shift-F7	Next Primary Key
F8	Clear Form
F11	Enter Query
Ctrl-F11	Execute Query
Tab	Next Field
Shift-Tab	Previous Field
Page Down	Scroll Down
Shift-Page Down	Next Block
Page Up	Scroll Up
Shift-Page Up	Previous Block
Down Arrow	Next Record
Ctrl-Down Arrow	Insert Blank Record
Up Arrow	Previous Record
Ctrl-Up Arrow	Delete Current Record
Shift-Ctrl-E	Display Error
Ctrl-K	Show Shortcut Keys
Ctrl-L	Display List of Values
Ctrl-P	Print Current Form
Ctrl-S	Save
Ctrl-U	Update Record

### Oracle Menu and Toolbar

At the top of the Oracle window is a list of pull-down menus called the Main Menu bar. You can use these menus to navigate around a form, edit or retrieve data, or perform various other actions such as exiting the Oracle application.

File Edit View Folder Tools Window Help



In addition to using keyboard shortcuts and the main menu bar, you can perform functions by choosing icons from the toolbar which appears below the main menu bar in the main window. Each button performs a specific function when you click on it.

Icon	Function	Description
	New Record	Inserts or creates a New Record
	Find	Displays Find window to allow you to query for a specific record
	Show Navigator	Shows Navigator Menu
	Save	Saves information
	Switch Responsibility	Allows you to change from one department responsibility to another department or to a specific function responsibility (i.e. Special Earnings)
	Print	Prints the record or form

	Close Form	Closes current form. Can also use the 'x' icon in the upper right corner of the form
	Cut	Moves the selected text to the clipboard for pasting to another location
	Copy	Copies the selected text to the clipboard for copying to another location
	Paste	Places the contents of the clipboard at the cursor position
	Clear Record	Clears information from current form
	Delete Record	Deletes current record from database
	Edit Field	Can be used to edit a text field. You can also click in the field and make changes
	Zoom	Allows you to send new hire records into the approval process or open the assignment change form to make assignment changes
	Attachments	Allows you to enter comments
	Alter Effective Date	Allows you to change the Effective Date
	DateTrack History	Displays changes made to a DateTracked record

## Data Entry Standards

Below is a list of formats and data entry standards that should be followed when entering information in Oracle.

Data	Format
Text	Text is case-sensitive; use upper- and lower-case letters
Name	Do not use any special characters except '-' and ' (O'Neill Jones-Doe). Do not use punctuation with Middle Name initials or after a Suffix such as Jr
Telephone Numbers	Enter telephone numbers as follows: (xxx) xxx-xxxx
Dates	Enter dates as follows: dd-mmm-yyyy (01-JAN-2021). Some fields permit an abbreviation: dmmmyy.
Social Security Numbers	Enter social security numbers as follows including dashes: xxx-xx-xxxx

### Selecting a Responsibility

A responsibility is equivalent to a department or college as well as a user role within the department or college. The [Oracle Access Levels](#) describes the user roles that can be requested. Responsibilities are used to restrict access to information by department or by specific functions. Each Oracle user has at least one responsibility, the CSU Employee Self-Service responsibility. A user can have many responsibilities.

After logging into the HR System, users will be given a list of responsibilities to select from.

Select the desired responsibility by clicking on its name. A specific set of forms that are associated with the responsibility will be displayed. You can minimize the initial Navigator window and Worklist, but it must remain open while you are using the HR System. Once you have selected an Oracle form associated with a responsibility, you can change responsibilities by clicking on the 'Switch Responsibility'  icon and select a new responsibility.

### Using the Navigator Menu

The Navigator window displays a list of forms that you will use to accomplish specific tasks. The window is always present during your Oracle session. The forms that you can navigate to are displayed in a list on the left side of the Navigator window.

The list is organized in a hierarchy system, where you can expand items preceded by a plus sign (+) to sub-levels until you find the form you wish to navigate to. Sub-levels appear indented below the items from which they are expanded. Items that are expanded are preceded by a minus (-).

To expand or collapse an entry to its next sub-level, choose one of the following methods:

- Double-click on the entry, or
- Select the entry and click Open from the File option in the main menu , or
- Select the entry and click one of the following buttons:



To expand or collapse several entries at once, click one of the following buttons:



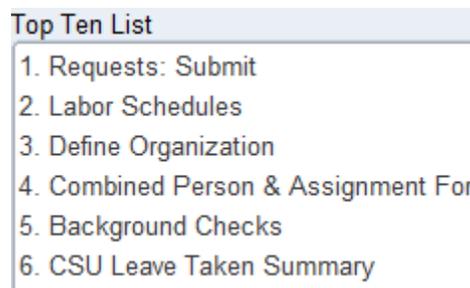
### Creating a Top Ten List

On the right side of the Navigator window is an area which can be customized with a list of up to ten forms that you use frequently.

To add a form to your Top Ten List, highlight the desired form in the list on the left side of the Navigator window and click the 'Add to List'  button.

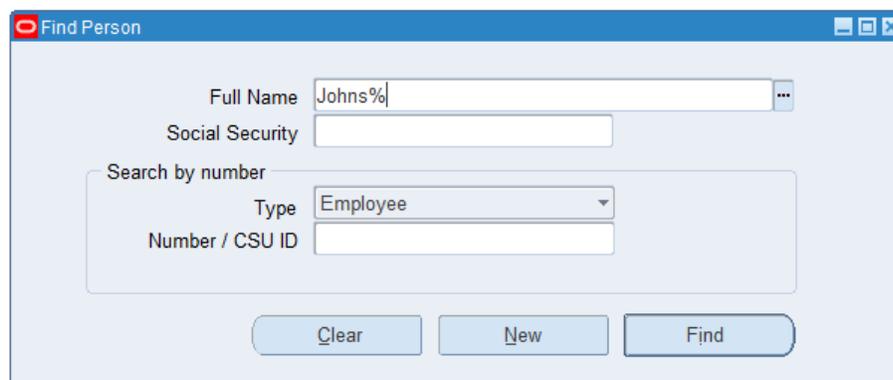
To remove a form from your Top Ten List, highlight the form in the customized list on the right side of the Navigator window and click the 'Remove from List'  button.

The Top Ten List displays your forms numerically to allow you to select them by typing the number of the entry. For example, to jump directly to your Labor Schedules form, type '2' on your keyboard.



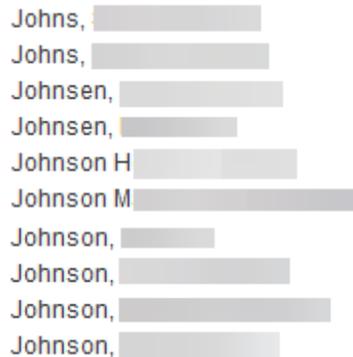
### Searching

The percent '%' sign is the wildcard used to assist in searching for information in the HR System. You might have an employee whose last name is Johnsen or Johnson but are not sure how they spell their name. You can search for the employee by entering the first part of their last name and include the percent sign '%' wildcard to find all employees who have a last name that starts with **Johns** as shown below.



The example above will provide a list of employees similar to the list shown below. The % after Johns will tell Oracle to find all records with a last name that starts with Johns with no regard for what comes after

Johns. The **Full Name** is stored in the Oracle database as Last Name, First Name Middle Name with a space after the comma such as Doe, John David. When searching for John Smith for example, you might assume there are several John Smith's in the database. To cut down on the number of records that are returned in a search, you could enter **Smith, J%** to find only records with a last name of Smith and those with a first name that starts with the letter J. You could also enter **Smith, Jo%** if you know the first part of the first name starts with **Jo** but not sure if the name is John or Jonathan or Jon.

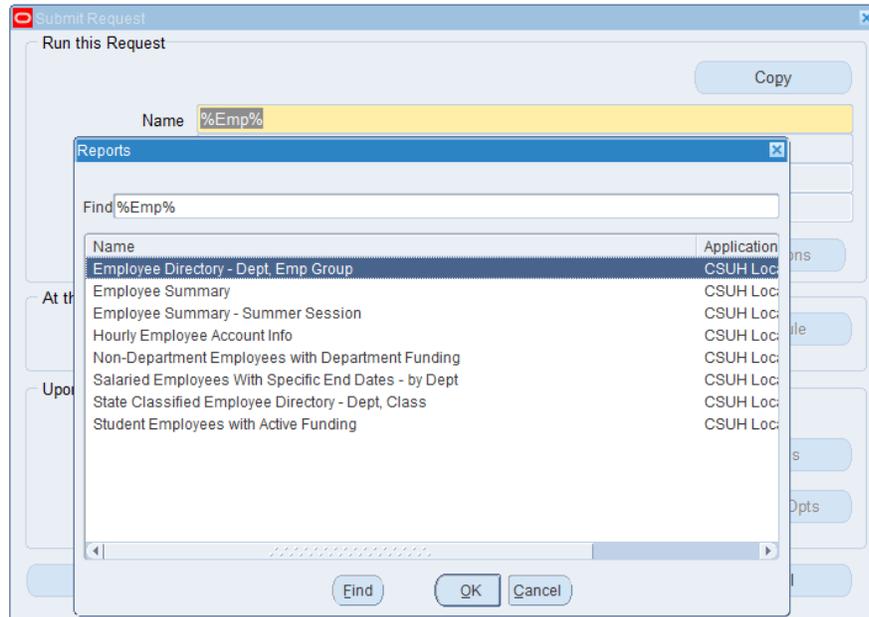


Johns, [REDACTED]  
Johns, [REDACTED]  
Johnsen, [REDACTED]  
Johnsen, [REDACTED]  
Johnson H [REDACTED]  
Johnson M [REDACTED]  
Johnson, [REDACTED]  
Johnson, [REDACTED]  
Johnson, [REDACTED]  
Johnson, [REDACTED]

A search such as **%liam%**, would find everyone in the database with a last name that contains the characters **liam** such as William, Gilliam, and McWilliams. The wildcard placed before and after the characters **liam** will search for anyone with a last name that contains the letters **liam**. The comma after **%liam%** tells the system to look for those characters in the last name field. If the comma was not entered in the search, the system would look for the characters **liam** in any part of the name including the first name and middle name.

**NOTE:** The suffix is included in the **Last Name** field. **Joseph Williams III** would have a last name of **Williams III**. When searching for someone by last name, you would want to search for **Williams%**, to find someone with a suffix included in the last name field. An employee listed as **Williams III, Joseph** for example would not be found if you searched for **Williams,%** as the comma right after the last name would not look for anyone other than someone with only a last name of Williams. If you search for **Williams%**, by inserting the % wildcard after the last name but before the comma, the search would look for anyone who has a last name that starts with Williams and find those with a suffix such as III or Jr included in the last name field.

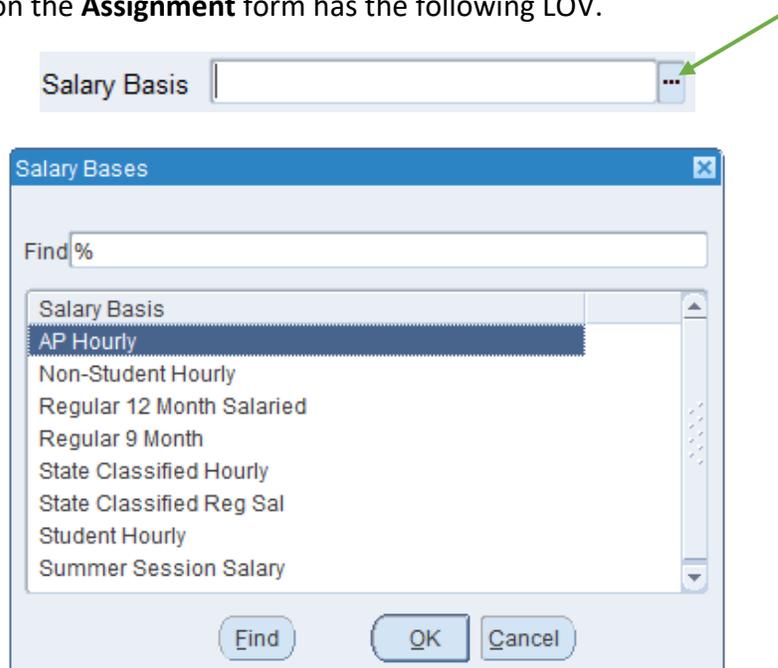
The wildcard is also helpful when searching for reports using the Process and Reports menu option. To search for an employee report, you could enter **%Emp%** which would search for any report that contains the characters **Emp** anywhere in the title of the report as shown below.



### Using a List of Values

A List of Values (LOV) exists for many fields in the HR System and lists the values that can be used to populate a particular field. To determine if an LOV exists, place the cursor in the field you wish to populate. A list of values is available for a field when the LOV button (an ellipsis "...") appears at the right side of the field. When you open or click on the LOV button, the values appear in a window with a title that describes the contents. You can select the appropriate value from the list.

The **Salary Basis** field on the **Assignment** form has the following LOV.



To quickly select the appropriate value for a field from the LOV, you can type the first few letters and press 'Tab'. If there is only one matching value, the field will automatically populate with that value. If there is more than one possible value, a list of those values will display.

For example, to enter 'Student Hourly' in the Salary Basis field above, you could type 'Stu' and press 'Tab'. If you typed only 'St' you would be given a choice of three options – 'State Classified Hourly', 'State Classified Reg Sal' and 'Student Hourly'.

## DateTracking

### What is DateTracking?

Most 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.

DateTrack ensures that only information effective on that day is used for any processing, validation, and reporting.

When you make a change, you can often 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 a 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 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 the **Supervisor** field on the **Assignment** form, you will often be prompted to choose between Update and Correction.

If you are changing or entering information for a new employee or a new assignment, always choose **Correction**. To change information on an approved assignment, you must use the **CSU Assignment Changes** form.

If you are correcting data on the **CSU Departmental Person/Assignment** form that was entered incorrectly when the employee was hired, choose **Correction**. DateTrack History will not show that a different value existed for the field in the past.

If the information on the **CSU Departmental Person/Assignment** form has changed since the hire date (marital status, for example), DateTrack to the effective date of the change before entering the new data and when you save the information, 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 then 'Update' the information using the same date as the start date of the record. 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.

### Example of a Correction

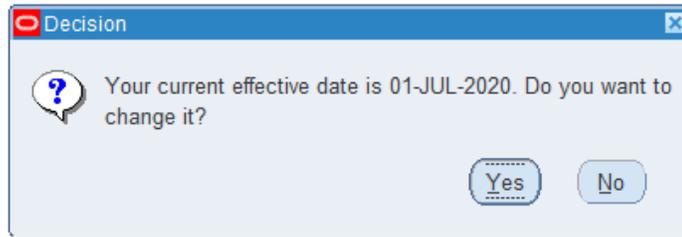
If you hired an employee a week ago and today discover that you entered an incorrect marital status for the employee, you would correct the marital status by entering the correct value and then choosing **Correction** when you save the information. By choosing **Correction**, you are changing the record all the way back to the day of the hire and no history of the original value will be saved.

### Example of an Update

If an employee was listed as Single and then got married, you would **Update** the information by setting your effective date to the date of the marriage and enter the new marital status on the **CSU Departmental Person/Assignment Form**. By choosing **Update**, you change the record to reflect the new marital status, while also preserving the previous historical information on the record. The above examples are using the **Marital Status** field on the **CSU Departmental Person/Assignment Form**. Employees can update this information through Employee Self-Service as well.

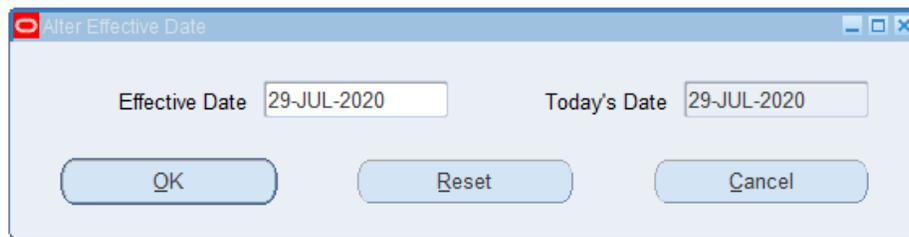
### Setting the Effective Date

The effective date defaults to today's date when you log into the HR System. To view past or future-dated information, you must change your current effective date. A **Decision** box will display with the current effective date and ask if you want to change the effective date when selecting a form that is DateTracked. 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.



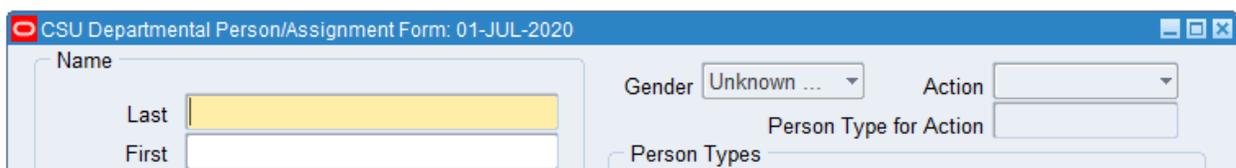
To change the effective date:

Click 'Yes' in the **Decision** window. When the **Alter Effective Date** window displays, enter or select a new effective date and click 'OK'.



You can use the 'Reset' button to reset your effective date to today's date if you had DateTracked to a date other than today's date.

When the effective date is different from today's date, it is displayed in the title bar of every form. If there is no date displayed in the title bar of the form, you are DateTracked to today's date. In the example below, we are DateTracked to 01-JUL-2020.



If the current effective date is set to today's date and you are on the **CSU Departmental Person/Assignment Form** and open the **Assignment** form, the **Assignment** form's effective date will also be today's date. You can change the current effective date while the **Assignment** form is open by clicking on the 'Alter Effective Date'  icon in the toolbar. The date you select as your effective date while on the **Assignment** form only applies to the **Assignment** form and forms related to the **Assignment** form. When you close the **Assignment** form, the date that was set when you opened the **CSU Departmental Person/Assignment Form** is reset to its previous value.

In the example below, the current effective date or DateTracked date is set to the current date. (No date listed in the title bar of the **CSU Departmental Person/Assignment Form** indicates you are DateTracked to today's date).

The **Assignment** form has a date listed as 08-AUG-2020. This indicates that the 'Alter Effective Date' icon was used to change the current effective date or the DateTracked date to 08-AUG-2020 while the **Assignment** form was open. The information displayed on the Assignment form is current as of 08-AUG-2020 while the information listed on the **CSU Departmental Person/Assignment Form** is information as of the current date.



You can use the 'Alter Effective Date' icon in the toolbar to change the effective date on all forms that are DateTracked.

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 dates. The Effective Dates **From** and **To** fields on the DateTracked form indicate the dates between which the information is valid.

Suppose you are viewing an assignment with an Effective Dates **From** date of 01-MAY-2019 and there is no Effective Dates **To** date, as shown below. This indicates that the assignment was either created or last changed on May 1<sup>st</sup> 2019 and the information you are viewing on the form is current. There have been no changes to the assignment since May 1<sup>st</sup>, 2019 and there are no future-dated changes.

A screenshot of the 'Effective Dates' section in an Oracle form. It features two text input fields: 'From' containing '01-MAY-2019' and 'To' which is empty and highlighted with a red border. To the right of the 'To' field is a small button with the number '25'. Below these fields is a horizontal toolbar with four buttons: 'Salary', 'Entries', 'Entry History', and 'Extra Information'.

To find out whether the assignment existed prior to May 1<sup>st</sup>, 2019, you can either change your effective date to a date prior to May 1<sup>st</sup> 2019 or use DateTrack History.

A date listed in the Effective Dates **To** field indicates that the record has been updated with an effective date one day after the Effective Dates **To** date. Using the example below, we have an Effective Dates **To** date listed as 15-MAY-2020. This indicates that there has been a change made to this record with an effective date of 16-MAY-2020. The information you are viewing would be effective or current from 01-SEP-2019 thru 15-MAY-2020. To find out what changes were made to the record as of 16-MAY-2020, you would set your effective date to the day after the **To** date, in our example, you would set your effective date to 16-MAY-2020 or use DateTrack History.

Effective Dates

From 01-SEP-2019 To 15-MAY-2020 [ 16 ]

Salary Entries Entry History Extra Information

You can use DateTrack History to see a summary of all the changes made to a DateTracked record over time.

The **DateTrack History Change Field Summary** window displays when you click on the 'DateTrack History' icon.  Each row shows which fields were changed as of the **From** date. Not all fields such as the Beer Mug fields are included in the **DateTrack History Change Field Summary** Window.

In the example below, the assignment was created on 25-SEP-2017 (initial **From Date** listed on the **DateTrack History Change Field Summary** window) and was changed with an effective date of 01-DEC-2017. You can see in the **Change Field Summary** field that the Supervisor was changed with an effective date of 01-DEC-2017. From the initial start date of the assignment (25-Sep-2017) thru 30-NOV-2017, this assignment might have had John Doe listed as the supervisor. You can click the 'Full History' button to see the supervisor field and the changes made to the supervisor field. The supervisor was changed again with an effective date of 08-JAN-2019. Between 01-DEC-2017 and 07-JAN-2019, this assignment might have a supervisor of Betty Williams (all names are examples only). The last change on this record was made with an effective date of 01-MAY-2019. Since the **To Date** in the **DateTrack History Change Field Summary** window does not contain a date or is 'blank', you can tell that the change that was made with an effective date of 01-MAY-2019 is the last change that was made and no changes have been made to this record since 01-MAY-2019.

From Date	To Date	Change Field Summary	Effective
01-MAY-2019		Supervisor	<input checked="" type="checkbox"/>
08-JAN-2019	30-APR-2019	Supervisor	<input type="checkbox"/>
01-DEC-2017	07-JAN-2019	Supervisor	<input type="checkbox"/>
25-SEP-2017	30-NOV-2017		<input type="checkbox"/>
			<input type="checkbox"/>

Full History

You can use the 'Full History' button to view several of the fields that are DateTracked to see what information was changed. If you clicked the 'Full History' button you would see the initial supervisor and all supervisor changes that have been made to this record.

**NOTE:** If you are searching for a new employee or an assignment and cannot find the record(s), make sure to check your current effective date. If the new employee's start date or the assignment start date is in the future, you will not see them in the HR System until you set your current effective date to a date equal to or greater than the effective start date of the new assignment or the effective start date of the employee's record. For example, if you are DateTracked to today's date which happens to be 1-JAN-2021 and your new employee has an effective start date of 15-JAN-2021, you will not be able to find the employee record until you use the 'Alter Effective Date' icon and set your effective date to 15-JAN-2021 or a date after 15-JAN-2021.