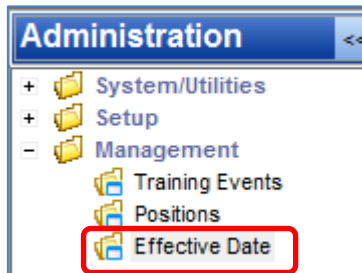


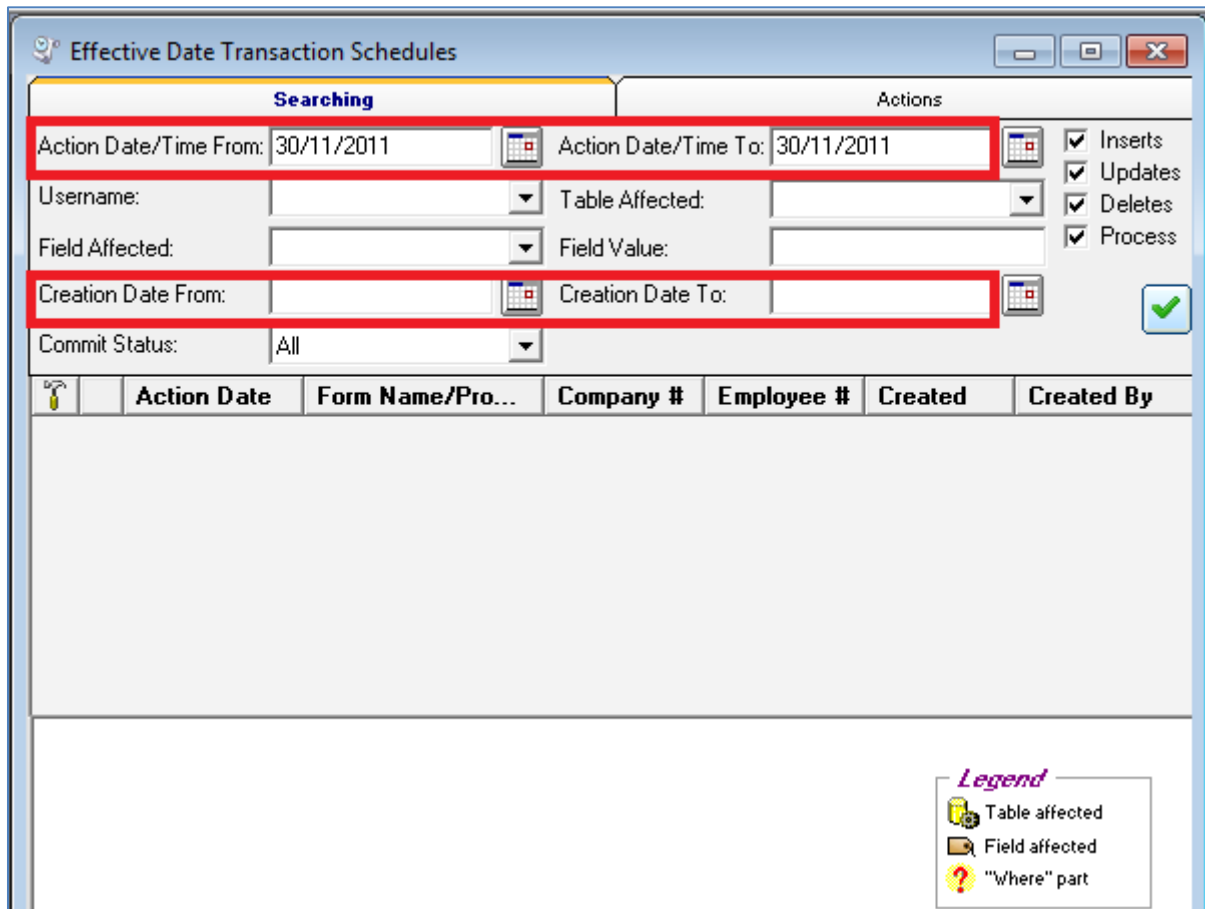
EFFECTIVE DATED ACTIONS (Managing)

Effective Dated Action can be tracked and managed by the SmartHR Administrator;

Go to



Click on Effective Date, the following screen will open

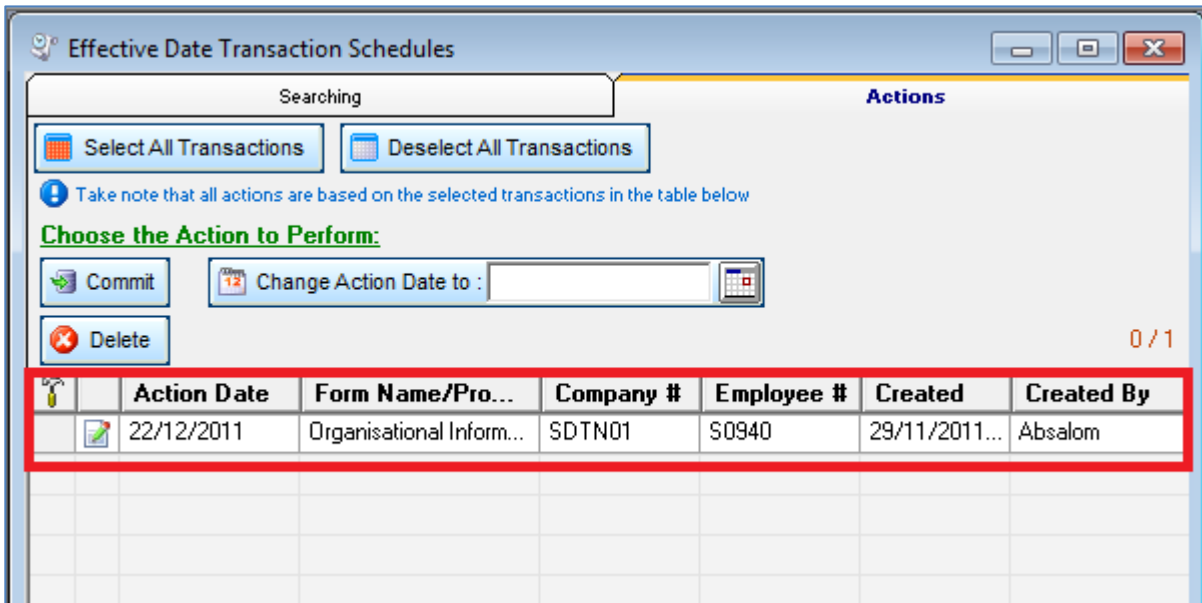



Enter the relevant information.

- Action Date: Refers to the date on which the change/update will take place in the system
- Username: Select the SmartHR user who actioned the Effective Date transaction
- Table Affected: (Optional) enter the SmartHR table/module on which the Effective Date was actioned
- Field Affected: The specific field within the selected SmartHR table
- Field Value: The lookup table option within the selected field
- Creation Date: Refers to the date on which the Effective Date transaction was created
- Commit Status: The current status of the Effective date Action

Select Insert / Updates / Deletes / Process and click on the Green Tick 

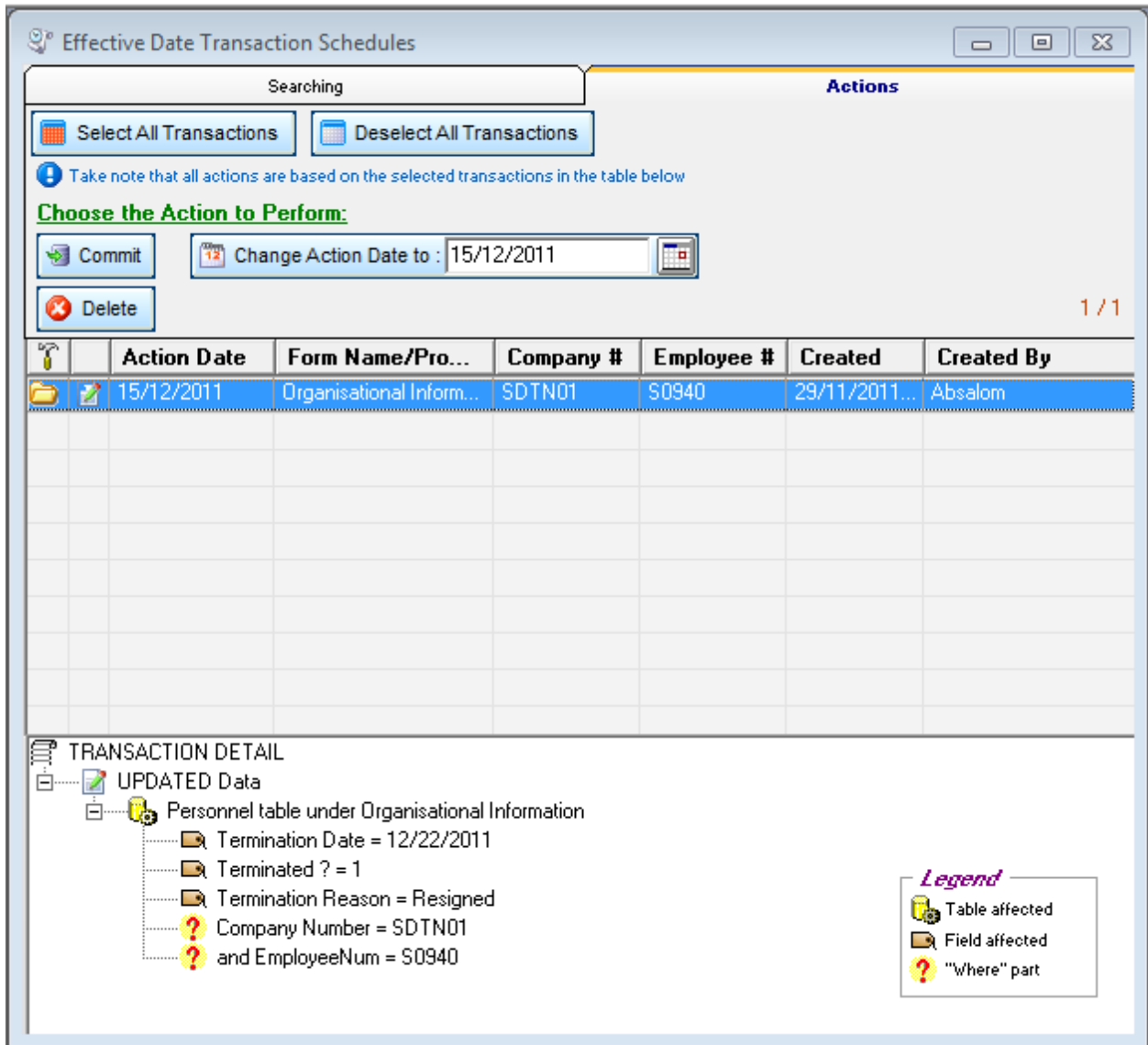
The screen will now change and display the following information

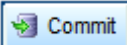


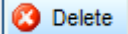
	Action Date	Form Name/Pro...	Company #	Employee #	Created	Created By
	22/12/2011	Organisational Inform...	SDTN01	S0940	29/11/2011...	Absalom

You will notice the Action Date for your Effective Date Action as well as the employee information of the person on who the change will take place.

By clicking on the selected line item you will also see a detailed summary of the information that will be added/changed on the Action Date



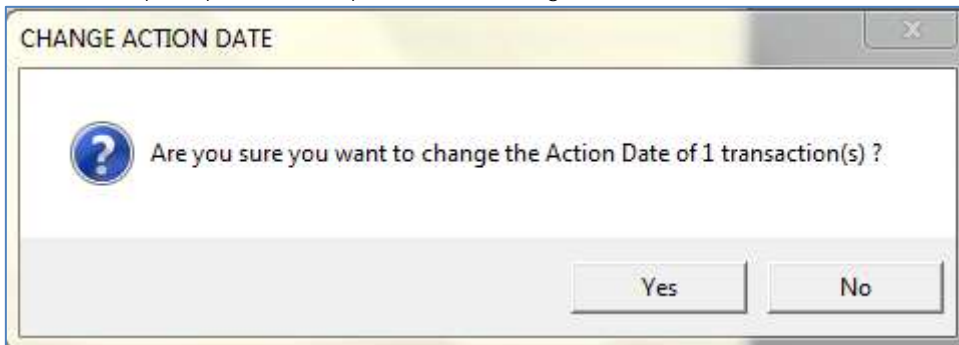
If you choose you can now commit the action – BEFORE the actual Action Date by clicking on 

You also have the opportunity to Delete the Action 

Action Dates can also be changed by entering a new Action Date 

To make date changes, click on Change Action Date to 

You will be prompted to accept the Date change



Please note: A change in Action Date will NOT change the Termination date in this example, it only effects the date on which the data will be changing.

Effective Date Scheduled Task

The effective dated transactions are committed as part of the scheduled task *Effective Date Transactions*.

Ensure that the Effective Date Transactions Scheduled task is running together with the User group and Leave Balance tasks

