Using the Controls toolbar in MyTRS

In this Reference Guide, you will learn how to use:

- the Controls toolbar,
- the Add function,
- the Delete function,
- the Filter function,
- the Modify control,
- the Sort control,
- the View Row control,
- the # Records control,
- the Print control, and
- the Export control.

Understanding the Controls toolbar

Many screens in MyTRS contain data grids in which several records are stored as rows and columns, similar to a spreadsheet. These grids also come equipped with a toolbar called Controls, which allows a user to perform several tasks on the data grid and make use of the data contained within the grid.

Below is a quick description of all of the buttons in the Controls toolbar.



- Add Allows a user to add a row (record) to the data grid.
- **Delete** Allows the user to delete a row (or rows) from the data grid.
- Addons This control is not currently used.
- **Filter** Allows a user to select what record or records to display at any given time in the data grid. For instance, a grid can be filtered to show subgroups of rows or to only show a specific row, depending on the user's preference.
 - **Execute Filter** () Tells MyTRS to filter the grid as specified.
 - **Clear Filter (**) Clears the filter boxes.

- **Modify** Allows a user to make the same change to several selected records simultaneously. For example, a user can modify several pay dates in a report or maybe apply the same service correction code to a pool of employees. The Modify function is only available in Edit mode. Using the **Filter** button before using the Modify function may make using the Modify function more effective.
 - **Execute Modify** () Tells MyTRS to modify the specified rows.
 - **Clear Modify** () This clears modify row so new criteria can be entered.
- **Sort** Allows a user to sort a data grid. A green arrow will appear to signify if the grid is sorted in ascending order or descending order. (You can also sort a data grid by clicking on the desired column header.)
 - **Execute sort** () Tells MyTRS to sort your grid as specified.
 - **Cancel Sort** (**IX**) Closes the sort function without sorting.
 - **Reset Sort** (**S**) Clears the sort criteria so new criteria can be entered.
- **View Row** Allows a user to see a single row as a pop-up window rather than as a horizontal row in the grid.
- **#Records** Allows a user to change the viewable number of records per page. The MTRS generally recommends keeping the volume to 20-25 records per page for performance reasons. However, increasing the number per screen to use the modify function might be helpful. Expanding the selection to more than 70 records to use the modify function may cause performance issues. If you have expanded your selection to use the Modify function, it is recommended that you change it back to 25 before saving your progress.
 - **Execute #Records** () Changes the number of records in view
 - **Reset Sort** (**(**) Resets the sort criteria so new criteria can be entered.
- **Print** Allows the user to print the records displayed on a page without printing the rest of the screen information.
- **Export** Allows a user to export viewable records in multiple formats.

Opening the Controls toolbar

 Below is a screenshot of the top left corner of a MyTRS data grid. This image shows what the Controls toolbar looks like before it has been expanded. Note the plus sign on the left of the word "Controls." Expand the Controls toolbar by clicking on the + symbol next to Controls in the Report Details section.

🕀 Con												
Active	Select	Delete	SSN	Name	Reported Last Name	Reported First Name	Reported Middle Name	Reported Suffix				

Once you click **Controls**, the toolbar will expand to show the following options.

E C	ontrols	🖻 Add 🗖 💻 Delet	te 😵 Addons 🝸 Filter	😳 💊 b Modify 🛃 Sort 🔚 View	Row 🖽 Records 🖨 Print 🖗 Export
Activ	e E	Delete	SSN	Name	Reported Last Name

You have successfully opened the Controls toolbar.

Using the Add function to add a row to a grid

1) Expand the **Controls** toolbar in the Report Details section.

📄 Controls 🔍 🗣 Add 💻 Delet	:e 🕵 Addons 🝸 Filter	😳 💊 🇔 Modify 🛃 Sort 🧮 View F	Row 🎚 Records 🖨 Print 🖉 Export
Active Delete	SSN	Name	Reported Last Name

2) Click Add.

A new row appears in the records grid.

🖃 Con	📄 Controls 🔍 Add 😑 Delete 👹 Addons 🕎 Filter 🔯 Modify 🚰 Sort 🔚 View Row 🎚 Records 🖨 Print 🖉 Export											
Active	Select	Delete	SSN	Name 🛦	Reported Last Name	Reported First Name	Reported Middle Name	Reported Suffix				
\odot		×										

3) Enter the record's information in the primary field (in this case, the employee's Social Security number).

🗐 Con	trols 4	> Add =	- Delete 😽 Ad	dons 🕎 Filter 🗔	Modify 🛃 Sort 📔	🚦 View Row 🛄 R	.ecords 🗟 Prin	t 🕼 Export
Active	Select	Delete	SSN	Name 🛦	Reported Last Name	Reported First Name	Reported Middle Name	Reported Suffix
\odot		×	999080001					

Move your cursor to the next field. If the employee exists in MyTRS, MyTRS retrieves the member name based on the Social Security number you provided and populates the Name field.

ſ	📄 Controls 🔍 Add 😐 Delete 🞇 Addons 🕎 Filter 🔯 Modify 🚰 Sort 🔚 View Row 🆽 Records 🖨 Print 🖉 Export									
	Active	Select	Delete	SSN	Name 🔺	Reported Last Name	Reported First Name	Reported Middle Name	Reported Suffix	
	\odot		×	999-08-0001	APPLE, AMY	1				

4) Enter the remaining details in the editable fields of the grid.

901	ort											
	Rec Type	Pay Date	Period Date	Rate	Regular Deduction	2% Deduction	Installment	Service Correct Code	Base	Coach		
	A-Adjustment 💌 *	06/24/2010	06/01/2010		-50.00	0	0		1.0	0		

5) Click **Save** when finished.

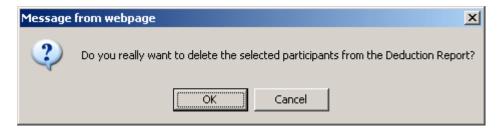
You have successfully used the Add button.

Using the Delete function

1) Select the row you would like to delete by clicking the radio button next to the desired row.

🖃 Con	🖂 Controls 🗢 Add 😑 Delete 😪 Addons 🝸 Filter 🔯 Modify 📴 Sort 🧮 View Row 🎚 Records 🖨 Print 🖗 Export											
Active	Select	Delete	SSN	Name 🛦	Reported Last Name	Reported First Name	Reported Middle Name	Reported Suffix	Rec Type			
•		×	999-08-0001	APPLE, AMY					A-Adjustment 💌	*		
0		🗙 🚹	999-08-0001	APPLE, AMY	APPLE	AMY			N-Normal 💌	*		
0		🗙 🛕	999-08-0001	APPLE, AMY	APPLE	AMY			N-Normal 💌	*		
0		🗵 🛕	999-11-0008	BIOLOGY, BETH	BIOLOGY	BETH			N-Normal 💌	*		

- 2) Click **Delete**.
- 3) A confirmation pop-up message will appear. Click **OK**.



4) Click Save.

You have successfully used the **Delete** function.

Using the Filter function

1) Click the **Filter** (**Filter**) button on the Controls toolbar.

-Report I	Details -									
🖃 Con	trols 📢	🖻 Add 😐	Delete 🞇 Ad	dons 🍸 Filter 🗔 I	Modify 🎦 Sort 📔	🚪 View Row 🛄 R	ecords 🖨 Prin	t 🕼 Expor	t	
Active	Select	Delete	SSN	Name 🔺	Reported Last Name	Reported First Name	Reported Middle Name	Reported Suffix	Rec Type	
•		🗵 🔬	999-08-0001	APPLE, AMY	APPLE	AMY			N-Normal 💌	*
0		🛛 🔨	999-08-0001	APPLE, AMY	APPLE	AMY			N-Normal 💌	*
0		🗵 🚹	999-11-0008	BIOLOGY, BETH	BIOLOGY	BETH			N-Normal 💌	*
0		🛛 🔨	999-11-0008	BIOLOGY, BETH	BIOLOGY	BETH			N-Normal 💌	*
0		🛛 🔨	999-09-0011	BOSS, BERNARD PHD	BOSS	BERNIE			N-Normal 💌	*
0		🛛 🔨	999-09-0011	BOSS, BERNARD PHD	BOSS	BERNIE			N-Normal 💌	*
0		×	999-11-0061	CALCULUS, CHRIS	CALCULUS	CHRIS			N-Normal 💌	*
0		×	999-11-0061	CALCULUS, CHRIS	CALCULUS	CHRIS			N-Normal 💌	*

The **Filter** control expands to show the **Execute filter** () and **Clear filter** () buttons and a blank row appears above the records in the grid.

	- Report Details											
E	Cont		• Add 😐 Delet	e 🕵 Addons 🍸 Filter	😳 💊 嫥 Modify 🛃 Sort 🧮 View F	Row 🎚 Records 🖨 Print 🖉 Export						
	Active	Select	Delete	SSN	Nan	Reported Last Name	Reported First Name					
	•		🗵 🚹	999-08-0001	APPLE, AMY	APPLE	AMY					
	0		🗵 🔨	999-08-0001	APPLE, AMY	APPLE	AMY					
	0		× 🔨	999-11-0008	BIOLOGY, BETH	BIOLOGY	BETH					
	0		🗵 🔨	999-11-0008	BIOLOGY, BETH	BIOLOGY	BETH					
	0		× 🔨	999-09-0011	BOSS, BERNARD PHD	BOSS	BERNIE					
	0		× 🔨	999-09-0011	BOSS, BERNARD PHD	BOSS	BERNIE					
	0		×	999-11-0061	CALCULUS, CHRIS	CALCULUS	CHRIS					
	0		×	999-11-0061	CALCULUS, CHRIS	CALCULUS	CHRIS					

2) Enter the filter criteria in the blank fields (e.g., enter an employee's name in the **Name** field to locate that employee's record.)

Μ	1ember (Count:	19 Row (Count: 37	uscu.		
	Release	Relea	ase Deductions		View Summary Excep	ot. Report Payment Details	Error Summary
Report	Details -						
Cor		🖻 Add 💻 Delet	te 📽 Addons 🝸 Filte	r 😳 💊 🍺 Modify 둘 Sort 🔚 View	Row 🎚 Records 🖨 Print 🖗 Export 🚽		
Active	Select	Delete	55N	Name 🛓	Reported Last Name	Reported First Name	Reported Middle Nam
		~		Math			
۲		🗵 🚹	999-08-0001	APPLE, AMY	APPLE	AMY	
0		× 🔥	999-08-0001	APPLE, AMY	APPLE	AMY	
0		×	999-11-0008	BIOLOGY, BETH	BIOLOGY	BETH	
C		× 🔥	999-09-0011	BOSS, BERNARD PHD	BOSS	BERNIE	
С		× 🔥	999-09-0011	BOSS, BERNARD PHD	BOSS	BERNIE	
C		×	999-11-0061	CALCULUS, CHRIS	CALCULUS	CHRIS	
0		×	999-11-0061	CALCULUS, CHRIS	CALCULUS	CHRIS	

3) Click **Execute** () to filter the data. The Report Details section refreshes and displays the narrowed results that match all of the criteria you entered.

N	1ember	Count:		19 Row	Count: 37	leaseu.		
	Release		Relea	ase Deductions		View Summary Exce	pt. Report Payment Details	Error Summary
Report	Details -							
🖃 Con	trols	🗣 Add 🗣	Delet	e 🕵 Addons 🝸 Filte	r 🤢 💊 🍺 Modify 🛃 Sort 🧮 View	v Row 🖽 Records 🖨 Print 🖗 Export 👘		
Active	Select	Delete		SSN	Name 🔺	Reported Last Name	Reported First Name	Reported Middle Name
			~		Math			
0		×		999-09-0003	MATH, MARY	MATH	MARY	Т.
С		×		999-09-0003	MATH, MARY	MATH	MARY	т.

- **Note** Users can filter based on multiple fields without clearing the filter between searches.
- 4) Click the **Clear Filter** () button to remove the criteria from the filter row.

	Member	Count:	19 Rov	v Count: 37	User Released:		
Report	Release	Rel	ease Deductions		View Summary	Except. Report Payment Detail	s Error Summary
Co	ntrols 4	🖻 Add 😐 Dele	ete 😵 Addons 🕎 Filt	er 🕄 💊 🗔 Modify 물 So	rt 🔚 View Row 🆽 Records 🖨 Print 🖨	Export	
Active	Select	Delete	SSN	Name 🔺	Reported Last Name	Reported First Name	Reported Middle Name
		~					
0		×	999-09-0003	MATH, MARY	MATH	MARY	Т.
0		×	999-09-0003	MATH, MARY	MATH	MARY	т.

Active	Select	Delete	SSN	Name 🔺	Reported Last Name	Reported First Name	Reported Middle Name	Reported Suffix	Rec Type	
•		🗵 🚹	999-08-0001	APPLE, AMY	APPLE	AMY			N-Normal	-
0		× 🔥	999-08-0001	APPLE, AMY	APPLE	AMY			N-Normal	•
0		×	999-11-0008	BIOLOGY, BETH	BIOLOGY	BETH			N-Normal	•
0		🗵 🛕	999-09-0011	BOSS, BERNARD PHD	BOSS	BERNIE			N-Normal	•
0		🗵 🛕	999-09-0011	BOSS, BERNARD PHD	BOSS	BERNIE			N-Normal	•
0		×	999-11-0061	CALCULUS, CHRIS	CALCULUS	CHRIS			N-Normal	•
0		×	999-11-0061	CALCULUS, CHRIS	CALCULUS	CHRIS			N-Normal	•
0		×	999-11-0064	DESK, DANIEL	DESK	DANIEL			N-Normal	•
0		×	999-11-0064	DESK, DANIEL	DESK	DANIEL			N-Normal	•
0		×	999-11-0010	EASEL, EMMA	EASEL	EMMA			N-Normal	•
0		×	999-11-0010	EASEL, EMMA	EASEL	EMMA			N-Normal	•
0		×	999-05-0002	GEBRA, AL	GEBRA	AL			N-Normal	•
0		×	999-05-0002	GEBRA, AL	GEBRA	AL			N-Normal	•
0		×	999-11-0060	GEOGRAPHY, GEOFF	GEOGRAPHY	GEOFF			N-Normal	•
0		×	999-11-0060	GEOGRAPHY, GEOFF	GEOGRAPHY	GEOFF			N-Normal	•
0		×	999-08-0013	GOODE, IMA	GOODE	IMA			N-Normal	•
0		×	999-08-0013	GOODE, IMA	GOODE	IMA			N-Normal	Ŧ
0		×	999-11-0016	LOCKER, LILY	LOCKER	LILY			N-Normal	•

5) Click **Execute** () to view all the records in the report.

You have successfully used the Filter function.

Using the Modify control

1) Click **Modify** (Modify) on the controls bar.

Release Release Deductions View Summary Except. Report Payment Details								
-Report	Report Details							
🖃 Con	😑 Controls 😔 Add 😑 Delete 😵 Addons 🍸 Filter 🤀 💊 🦝 Modify 🔀 Sort 🔚 View Row 🎩 Records 🖨 Print 🖨 Export							
Active	Select	Delete	SSN	Name 🛓	Reported Last Name	Reported First Name		
		~						
C		X	999-08-0001	APPLE, AMY	APPLE	AMY		

The **Modify** control expands to show the **Execute Filter** () and **Clear Filter** () buttons and a blank row with a checkbox and a value field for each column appears above the records in the grid.

F	Release		Release Deduc	tions		View Summary Except. Report P	ayment Details	
	Report Details							
Active	Select	Delete	SSN	Name 🔺	Reported Last Name	Reported First Name	Reported Middle Name	
C		🛛 🔨	999-08-0001	APPLE, AMY	APPLE	AMY		

2) Locate each column that you would like to modify and enter the needed correction in the value field.

Pay Date	Period Date	Rate	Regular Deduction	2% Deduction
06/11/2010				
06/10/2010	06/01/2010	11.0%	193.79	25.37

3) Check the column's checkbox.

Pay D	Period Date	Rate	Regular Deduction	2% Deduction
06/11/2010				
06/10/2010	06/01/2010	11.0%	193.79	25.37

Note In this example, all of the rows on the screen are being modified, but the user could choose to modify on select rows. To modify rows on other pages, you will need to navigate to the next page and repeat the steps.

Report Details 📄 Controls 🗣 Add 😑 Delete 🞇 Addons 🍸 Filter 🍺 Modify 🌐 🥸 💱 Sort 🔚 View Row 🎚 Records 🖨 Print 🖉 Export									
Active	Select	Delete	SSN	Name 🔺	Reported Last Name	Reported First Name			
0		🛛 🔨	999-08-0001	APPLE, AMY	APPLE	AMY			
۲	☑	🗵 🚹	999-11-0008	BIOLOGY, BETH	BIOLOGY	BETH			
0	◄	🗵 🔨	999-09-0011	BOSS, BERNARD PHD	BOSS	BERNIE			
0		×	999-11-0061	CALCULUS, CHRIS	CALCULUS	CHRIS			
0		×	999-11-0064	DESK, DANIEL	DESK	DANIEL			
0		×	999-11-0010	EASEL, EMMA	EASEL	EMMA			

4) Click the **Select** checkbox(es) to choose the record(s) to modify.

If you click the **Select** button on in the header, all of the records on the screen will be selected or deselected.

Re	-Report Details										
E	📄 Controls 🌈 dd 😐 Delete 🕺 Addons 🝸 Filter 뒗 Modify 🤀 🦠 🕎 Fart 🔚 View Row 🎚 Records 🖨 Print 🖉 Export										
A	ctive	Select	Delete	SSN	Name 🛦	Reported Last Name	Reported First Name				
0	0		🗵 🚹	999-08-0001	APPLE, AMY	APPLE	AMY				
¢	•		🗵 🚹	999-11-0008	BIOLOGY, BETH	BIOLOGY	BETH				
¢	0		🗵 🚹	999-09-0011	BOSS, BERNARD PHD	BOSS	BERNIE				
¢	0		×	999-11-0061	CALCULUS, CHRIS	CALCULUS	CHRIS				
6	0		×	999-11-0064	DESK, DANIEL	DESK	DANIEL				
6	0		×	999-11-0010	EASEL, EMMA	EASEL	EMMA				

5) Click **Execute** () to apply the correction to the selected records.

-Report Details			
📄 Controls 🔍 Add 💻 Delete	🛠 Addons 🝸 Filter 🗔 Modify	tiga 🍫 🛃	Sort 🔚 View Row
Active Select Delete SSN	Reported Last Name		Reported First Name

6) This box will appear. Click **OK**.



7) The selected records update and reflect the change.

Pay Date	Period Date	Rate	Regular Deduction	2% Deduction	Installment	Service Correct Code	Base
06/11/2010	06/01/2010	11.0%	193.79	25.37	0		2,422.38
06/11/2010	06/01/2010	11.0%	221.87	0	0	•	2,016.96
06/11/2010	06/01/2010	11.0%	519.23	92.31	0	•	5,769.23
06/11/2010	06/01/2010	11.0%	131.44	0	0	•	1,194.92
06/11/2010	06/01/2010	11.0%	131.44	0	0	•	1,194.92
06/11/2010	06/01/2010	11.0%	212.03	0	0		1,927.54

8) Click Save.

You have successfully used the **Modify** function.

Understanding the Sort Control

The MyTRS Controls toolbar provides users with a versatile sort function. The MyTRS **Sort** function allows a user to sort by multiple criteria, produce those results in ascending or descending order, and group your data by the sort criteria.

To sort by more than one column, select the columns (displayed as rows in the sort window) by dragging them into the appropriate order. For example, if you want to sort a deduction report by the **Date**, **Pay Frequency** and then **Pay Duration** columns, you will need to drag those three rows to the top and click the **Sort** checkboxes for each row.

Filter 🗔 Modif	y	🔽 Sort 🤢 💥 🕋 📴 View Row	표 Records	🖨 Print 🍺	Export
Name		Column - (Drag to sort)	Sort	Desc	Group Date
WHISTLE, LUTS	/	Pay Date			
-	W	Pay Freq			* Vb/10/2010
GEBRA, AL	G	Pay Dur			* 06/10/2010
GEOGRAPHY, GEOFF	G	Name			* 06/10/2010
GOODE, IMA	G	SSN			* 06/10/2010
LOCKER, LILY	L	Reported Last Name			* 06/10/2010
MATH, MARY	М	Reported First Name			* 06/10/2010
APPLE, AMY	A				* 06/10/2010
BIOLOGY, BETH	в	Reported Middle Name			
BOSS, BERNARD PHD		Reported Suffix			
	В	Rec Type			* 06/10/2010
CALCULUS, CHRIS	С	Period Date			* 06/10/2010
DESK, DANIEL	D	Rate			* 06/10/2010
PENCIL, PAUL	P	Regular Deduction			* 06/10/2010
PHYSICS, PHIL	P	2% Deduction			* 06/10/2010
RULER, RANDY	R	Installment			* 06/10/2010
SCIENCE, SARAH	5				* 06/10/2010
TENSION, DEE	Т	Service Correct Code			* 06/10/2010
NOTE, JUNE		Base			
	Т	Coach			* 06/10/2010
WHITE, C. HAUK	W	Retro			* * 06/10/2010
EASEL, EMMA	E	Long			* 06/10/2010
GEBRA, AL		Stipend			4/2010
GEOGRAPH .	, .	Premium			× vb/24/2010
	-	Premum	Г	Г	

By default, MyTRS sorts columns in ascending order. Click the **Desc** checkbox to place the results of your sorting in descending order on the level it is sorted by Pay frequency.

🛃 Sort 🤀 🗶 🕋 🔚 View Rov	v 进 Re📏	🖨 Print 💰	Export
Column - (Drag to sort)	Sort	Desc	Group
Pay Date			
Pay Freq			
SSN			
Pay Dur			
Name			

Click the **Group** checkbox to group the grid data based on a value in a specific column. For example, the grid above would sort the results into groups based on Pay Duration because that value is checked. When grouped, the grid collapses the data into the number of rows for each unique Member Type value.

🔽 Sort 🤃 🞇 🕋 🔚 Vi	ew Row 🔣 Recor	ds 🖨 Prin	Export
Column - (Drag to sort)	Sort	Desc	Group
Pay Date			
Pay Freq			
SSN			
Pay Dur	V		
Name			

When sorted by group, the groups will display under the Social Security number of the first qualified record with a plus sign in the column on the left. Click on the plus sign to expand the row and see the individual records for each group.

Ec	Controls 🕫 Add 🖙 Delete 🎇 Addons 🏆 Filter 🥵 Modify 🚾 Sort 🧮 View Row 🎚 Records 🚔 Prink 🖓 Export														
Đ		Select	Delete	SSN	Name	Reported Last Name	Reported First Name	Reported Middle Name	Reported Suffix	Rec Type		Pay Date 🔺	Period Date	Rate	Regular Deduction
Ð	>		×	999-05-0002	GEBRA, AL	GEBRA	AL			N-Normal	• *	06/10/2010	06/01/2010	5.0%	96.38
Ð	O		× \Lambda	999-09-0007	WHISTLE, DAVE	WHISTLE	DAVE			N-Normal	*	06/10/2010	06/01/2010	11.0%	550
															3,004.85
	8,531,54														
H 4	A 🖞 Page 2 of 2 🕨 🕅 Rows: 26 - 38 of 3														

In this instance, the second group was expanded to show two records. The first group of ten records is still closed.

	ontrols	🗢 Ad	d 😐 Del	ete 😵 Addons	ү Filter ឆ	Modify 📴 Sort [📑 View Row 🛄 F	Records 🖨 Pri	nt 🖗 Expo	rt					
Ŧ	Active	Select	Delete	SSN	Name	Reported Last Name	Reported First Name	Reported Middle Name	Reported Suffix	Rec Type		Pay Date 🛦	Period Date	Rate	Regular Deduction
+			×	999-05-0002	GEBRA, AL	GEBRA	AL			N-Normal 💌	8	06/10/2010	06/01/2010	5.0%	96.38
Ξ	0		× 🛕	999-09-0007	WHISTLE, DAVE	WHISTLE	DAVE			N-Normal 🔍	8	06/10/2010	06/01/2010	11.0%	550
	C 🔽 😹 🛕 999-09-0007 WHISTLE DAVE DAVE NHISTLE DAVE 06(24/2010 📰 06(01/2010 📰 11.0% 550)														
	3.004.85 8.53.154														
	8,531,54 Rows: 26 - 38 of 38														

Using the Sort function

1) Click the **Sort** (**Sort**) icon to expand the **Sort** control and open the *Sort Menu*.

The **Sort** control opens (**Sort W N**), and a menu with sort options appears in the middle of your screen.

lons 🝸 Filter 🗔 N	1odify	🔽 Sort 🤀 🗶 🕥 🔚 View Row) 🛄 Record	s 🖨 Print 💰	Export			
Name 🔺		Column - (Drag to sort) SSN	Sort	Desc	Group			Period Date
APPLE, AMY	APPLE	Name				*	06/10/2010	06/01/2010
APPLE, AMY	APPLE	Reported Last Name				*	06/24/2010	06/01/2010
BIOLOGY, BETH	BIOLO	Reported First Name				*	06/10/2010	06/01/2010
BIOLOGY, BETH	BIOLO	Reported Middle Name				*	06/24/2010	06/01/2010
BOSS, BERNARD PHD	0000	Reported Suffix				*	06/10/2010	06/01/2010
BOSS, BERNARD PHD	BOSS	Rec Type				*	06/24/2010	06/01/2010
CALCULUS, CHRIS	CALCU	Pay Date				*	06/10/2010	06/01/2010
CALCULUS, CHRIS	CALCU	Period Date				*	06/24/2010	06/01/2010
DESK, DANIEL	DESK	Rate				*	06/10/2010	06/01/2010
DESK, DANIEL	DESK	Regular Deduction				*	06/24/2010	06/01/2010
EASEL, EMMA	EASEL	2% Deduction				*	06/10/2010	06/01/2010
EASEL, EMMA	EASEL	Installment				*	06/24/2010	06/01/2010
GEBRA, AL	GEBRA	Service Correct Code				*	06/10/2010	06/01/2010
GEOGRAPHY, GEOFF	GEBRA	base				*	06/24/2010	06/01/2010
GEOGRAPHY, G	19-019	Coach				2	06/10/2010	06/01/2010
GOODE, IMA	-/	Retro						06/01/2010
COODE, INA	GOOD	Long				*	06/10/2010	06/01/2010

2) Select the columns (displayed as rows) that you would like to sort by clicking and dragging the row to the top of the grid.

lons 🍸 Filter 🗔 1	Modify	🔽 Sort 🤯 💥 🕋 🔚 View Row	📖 Records	🖨 Print 🧔	Export		
Name 🔺	Reporte	Column - (Drag to sort) Pay Dur	Sort	Desc	Group		Pay Date
APPLE, AMY	APPLE					*	06/10/2010
APPLE, AMY	APPLE					*	06/24/2010
BIOLOGY, BETH	BIOLO	SSN				*	06/10/2010
BIOLOGY, BETH	BIOLO	Name				*	06/24/2010
BOSS, BERNARD PHD	BOSS	Reported Last Name				*	06/10/2010

ons 🕎 Filter 🗔 I	vioaity	🔽 Sort 🤯 🞇 🕋 🧮	View Row 🛄 Recor	ds 🖨 🖨 Print	🕼 Export		
Name 🔺	Reporte	Column - (Drag to sort)	Sort	Desc	Group		Pay Date
		Pay Dur					
APPLE, AMY	APPLE	Pay Freq				*	06/10/2010
APPLE, AMY	APPLE	Pay Date				*	06/24/2010
BIOLOGY, BETH	BIOLO	SSN		Checkbox for	Pay Date field	*	06/10/2010
BIOLOGY, BETH	BIOLO	Name				*	06/24/2010
BOSS, BERNARD PHD	BOSS	Reported Last Name				*	06/10/2010
BOSS, BERNARD PHD	BOSS	Reported Last Name				*	06/24/2010

3) Click on the **Sort** checkbox(es) to set the sort column(s).

4) After creating your sort order, click **Execute** (1990) to sort the grid or **Cancel** (1990) to close the **Sort** control and leave the grid in its original form.

If you clicked **Execute**, the **Sort** menu will close and the grid will display as specified.

	Select						Reported Middle	Reported				
ctive		Delete	SSN	Name	Reported Last Name	Reported First Name	Name	Suffix	Rec Type		Pay Date 🛦	Period Date
•		🛛 🔨	999-09-0007	WHISTLE, DAVE	WHISTLE	DAVE			N-Normal	• *	06/10/2010	06/01/2010
2		🗵 🚹	999-09-0007	WHISTLE, DAVE	WHISTLE	DAVE			N-Normal	• *	06/24/2010	06/01/2010
)		×	999-05-0002	GEBRA, AL	GEBRA	AL			N-Normal	•	06/10/2010	06/01/2010
)		×	999-11-0060	GEOGRAPHY, GEOFF	GEOGRAPHY	GEOFF			N-Normal	•	06/10/2010	06/01/2010
)		×	999-08-0013	GOODE, IMA	GOODE	IMA			N-Normal	•	06/10/2010	06/01/2010
)		×	999-11-0016	LOCKER, LILY	LOCKER	LILY			N-Normal	•	06/10/2010	06/01/2010
)		×	999-09-0003	MATH, MARY	MATH	MARY	т.		N-Normal	•	06/10/2010	06/01/2010
2		🛛 🔥	999-08-0001	APPLE, AMY	APPLE	AMY			N-Normal	•	06/10/2010	06/01/2010
)		🗵 🚹	999-11-0008	BIOLOGY, BETH	BIOLOGY	BETH			N-Normal	*	06/10/2010	06/01/2010
0		×A	999-09-0011	BOSS, BERNARD PHD	BOSS	BERNIE			N-Normal	• •	06/10/2010	06/01/2010

- 5) Review the rows returned by the **Sort** function in their new order.
- 6) Click the **Reset** button () to return the grid to its original sorted order.

You have successfully used the Sort function.

Using the View Row button

1) If you want to view all the data from a single row in a vertical format, click the radio button next to the desired row.

Report	Details –									
🗁 Controls 🗢 Add 🛥 Delete 📽 Addons 🍸 Filter 🛞 💊 🕎 🌄 Sort 🧮 View Row 🎛 Records 🖨 Print 🖨 Export										
Active	Select	Delete	SSN	Name 🔺	Reported Last Name	Reported First Name				
		~		easel						
0		× 🔨	999-11-0010	EASEL, EMMA	EASEL	EMMA				
\odot		🗵 🚹	999-11-0010	EASEL, EMMA	EASEL	EMMA				

2) Click View Row (View Row).

	🖂 Controls 🗢 Add	😐 Delete 😽 Addons	🍸 Filter 😳 💊	🛃 Sort 🔚 View Row	🏥 Records 🖨 Print 🖗 Export
--	--------------------	-------------------	--------------	-------------------	----------------------------

3) The record will appear in a pop-up window.

	Record# 1 of 2
Active	0
SSN	999-11-0010
Name	EASEL, EMMA
Reported Last Name	EASEL
Reported First Name	EMMA
Reported Middle Name	
Reported Suffix	
Rec Type	N-Normal
Pay Date	05/13/2010
Period Date	05/01/2010
Rate	11.0%
Regular Deduction	212.03
2% Deduction	0
Installment	0
Service Correct Code	
Base	1,927.54
Coach	0
Retro	0
Long	0
Stipend	0
Premium	0
Ineligible	0
FTE%	100
FTE Code	
Salary	0
Position	Teacher
ContrTerm	10
Pay Freq	26
Pay Dur	12
Override	

- **Note** When in edit mode on certain screens, a user can make corrections in each field while in this view.

	Record# 1 of 2
	▶ 4 4 ▶ ▶
Active	0
SSN	999-11-0010
Name	EASEL, EMMA
Reported Last Name	EASEL
Reported First Name	EMMA
Reported Middle Name	

5) Click the gray **X** icon (**I**) to close the pop-up window.

	Record# 1 of 2	\mathbf{x}
	14 4 > >1	
Active	0	
SSN	999-11-0010	
Name	EASEL, EMMA	

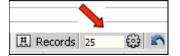
You have successfully used the View Row function.

Using the # Records button

1) Click the **# Records** icon (I Records) to expand the Records control.

📄 Controls | 🗢 Add | 😑 Delete | 🞇 Addons | 🍸 Filter | 🇔 Modify | 🕎 Sort | 🥁 View Row | 🎛 Records | 🖨 Print 🕼 Export

The **# Records** control will expand to show the **Execute** (🖾) and **Reset** (🛋) buttons.



2) Enter the desired number of rows in the text box.

🖽 Records 🔂	5 5
-------------	--------

3) Click **Execute** ().

The grid displays the number of rows indicated.

	eport Details Controls 🛛 Add = Delete 🎇 Addons 🍸 Filter 🌆 Modify 🌄 Sort 🧮 View Row 🎚 Records 🖨 Print 🖗 Export										
Active	Select	Delete	SSN	Name 🔺	Reported Last Name	Reported First Name	Reported Middle Name	Reported Suffix	Rec Type	Pay Date	Period Date
C		× 🔥	999-08-0001	APPLE, AMY	APPLE	AMY			N-Normal 💌 *	06/10/2010	06/01/2010
C		🛛 🛕	999-08-0001	APPLE, AMY	APPLE	AMY			N-Normal 💌 *	06/24/2010	06/01/2010
0		× \Lambda	999-11-0008	BIOLOGY, BETH	BIOLOGY	BETH			N-Normal 💌 *	06/10/2010	06/01/2010
0		× \Lambda	999-11-0008	BIOLOGY, BETH	BIOLOGY	BETH			N-Normal • *	06/24/2010	06/01/2010
0		× 🔥	999-09-0011	BOSS, BERNARD PHD	BOSS	BERNIE			N-Normal 💌 *	06/10/2010	06/01/2010
0		× \Lambda	999-09-0011	BOSS, BERNARD PHD	BOSS	BERNIE			N-Normal 💌 *	06/24/2010	06/01/2010
0		×	999-11-0061	CALCULUS, CHRIS	CALCULUS	CHRIS			N-Normal 💌 *	06/10/2010	06/01/2010
0		×	999-11-0061	CALCULUS, CHRIS	CALCULUS	CHRIS			N-Normal 💌 *	06/24/2010	06/01/2010
C		×	999-11-0064	DESK, DANIEL	DESK	DANIEL			N-Normal 💌 *	06/10/2010	06/01/2010
С		×	999-11-0064	DESK, DANIEL	DESK	DANIEL			N-Normal 💌 *	06/24/2010	06/01/2010
0		×	999-11-0010	EASEL, EMMA	EASEL	EMMA			N-Normal 💌 *	06/10/2010	06/01/2010

4) Click **Reset** () to return the grid to the default display number (25).

You have successfully used the # **Records** function.

Using the Print button

1) To print the grid, click the **Print** button (Print), which launches the *Print* pop-up window. Select the desired printer properties and click **OK** to print all of the records in the grid, or click **Cancel** to abort the print job.

Printer Name: \\mtrs-file\Employer_Services	Properties
Status: Ready	Comments and Forms:
Type: HP Universal Printing PCL 5	Document and Markups
Print Range ● All ○ Current view ○ Current page ○ Pages 1 - 8 Subset: All pages in range ○ Reverse pages Page Handling ○ copies: 1 = ○ ○ Collate Page Scaling: None ○ Auto-Rotate and Center ○ Choose paper source by PDF page size ○ Use custom paper size when needed	Preview: Composite
Print to file	Document: 11.0 × 8.5in Paper: 11.0 × 8.5in 1/8

You have successfully used the **Print** function.

Using the Export button

1) Click the **Export** (Export) button to expand the **Export** control.

The Export control opens (🖻 Export 📓 XLS 🎦 PDF).

2) Click the **XLS** (I button to export your grid to Excel.

The *File Download* box appears.

File Dowr	nload						
Do you want to open or save this file?							
×	Name:ges_WorkReportPage_WORK_HISTORY_GRID.xls Type: Microsoft Excel Worksheet, 23.0KB From: v3uat.trb.state.ma.us						
	<u>Open</u> <u>Save</u> Cancel						
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?							

3) Click **Open** to open the file in your default program; click **Save** to save the file to the location of your choice; or click **Cancel** to cancel the export, close the dialog box, and return to your report.

<u>O</u> pen	<u>S</u> ave	Cancel

4) If you clicked **Open**, your exported file appears in front of you in your default xls format program (likely Microsoft Excel).

🕱 Microsoft Excel - June.xls							
📳 File Edit View Insert Format Tools Data Window Help Type a question for help 🗸 🗗 🗙							
i 100% • 🙄 Arial • 10 • B I U ≣ ≣ 🗐 💲 % , 號 💯 🖽 • 🌺 • 🛓							
🗓 🔄 🖄 🖾 💁 🐚 🗇 🏷 🔮 🍢 📦 🕈 W Reply with Changes End Review 🥊							
	C28	▼)	PHYSICS, PHIL				
	A	В	С	D	E		
1	Delete	SSN	Name	Reported Last Name	Reported First Name		
2		999-08-0001	APPLE, AMY	APPLE	AMY		
3		999-08-0001	APPLE, AMY	APPLE	AMY		
4		999-11-0008	BIOLOGY, BETH	BIOLOGY	BETH		
5		999-11-0008	BIOLOGY, BETH	BIOLOGY	BETH		
6		999-09-0011	BOSS, BERNARD PHD	BOSS	BERNIE		
7		999-09-0011	BOSS, BERNARD PHD	BOSS	BERNIE		
8		999-11-0061	CALCULUS, CHRIS	CALCULUS	CHRIS		
9		999-11-0061	CALCULUS, CHRIS	CALCULUS	CHRIS		
10		999-11-0064	DESK, DANIEL	DESK	DANIEL		
11		999-11-0064	DESK, DANIEL	DESK	DANIEL		
12		999-11-0010	EASEL, EMMA	EASEL	EMMA		
13		999-11-0010	EASEL, EMMA	EASEL	EMMA		
14		999-05-0002	GEBRA, AL	GEBRA	AL		
15		999-05-0002	GEBRA, AL	GEBRA	AL		
16		999-11-0060	GEOGRAPHY, GEOFF	GEOGRAPHY	GEOFF		
17		999-11-0060	GEOGRAPHY, GEOFF	GEOGRAPHY	GEOFF		
18		999-08-0013	GOODE, IMA	GOODE	IMA		
19		999-08-0013	GOODE, IMA	GOODE	IMA		
20		999-11-0016	LOCKER, LILY	LOCKER	LILY		
21		999-11-0016	LOCKER, LILY	LOCKER	LILY		
• •	с в в∖	WORK_HISTORY	_GRID /	•	•		
Rea	dy				NUM		

Note If you clicked **PDF** (PDF) to export your file, the above process is the same, only the report will appear in Adobe Acrobat.

reate Adobe PDE Using Acrobat.com oilagorate ave <u>a</u> Copy Shift+Ctrl+S a <u>v</u> e as Text ttach to Email	C € 68.9%	Reportal First Name	Reported Middle Name	
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999-08-0013 GOODE, IMA	GOODE	IMA		
995-11-0016 LOCKER, LILY	LOCKER	LILY		
999-11-0016 LOCKER, LILY	LOCKER	LEY	-	
999-09-0003 MATH, MARY 999-09-0003 MATH, MARY	MATH	MARY	T.	
999-11-065 NOTE, JUNE	TUNE	JUNE		
999-11-0063 NOTE, JUNE	TUNE	JUNE		
995-08-0009 PENCE, PAUL	PENCIL	PAUL		
995-08-0009 PENCIL, PAUL	PENCIL.	PAUL.		
999-05-0006 PHYSICS, PHIL	PHYSICS	PHEL		

5) To save your open file (shown below in the PDF format), click **File** and **Save a Copy**.

A dialog box appears to inform the user that PDF files cannot be modified in Adobe Reader. Click **OK**.

Adobe R	eader X
1	This document does not allow you to save any changes you have made to it unless you are using Adobe Acrobat 9, Adobe Acrobat Pro 9, or Adobe Acrobat Pro Extended 9. You will only be saving a copy of the original document. Do you want to continue?
Do Do	not show this message again
	OK Cancel

The **Save a Copy...** browser window appears. Name and save the file to a location of your choice.

Save a Copy	<u>?</u> ×
Save in: 🛅 2011 Employer training files 💽 🔇 🌮 🖽 -	
Wig Recent Documents Desktop Wig Computer Wy Network Places File name: Save as type: Adobe PDF Files (*.pdf) Cancel	
	1.

6) After naming your file and choosing a save location, click **Save**.

You have successfully used the **Export** function.