

Modify Records

The modify function allows you to update data in the deduction report for multiple employees all at once.

Before using the Modify features, you must click APPLY so that any prior changes are saved.

There are two modify options in MyTRS.

1. **Modify Selected** – this will modify only the records that have been checked on an individual page.
2. **Modify** – this function works in two ways:
 - a. **If no filter is engaged**, then using the Modify function will modify EVERY record in the report.
 - b. **If a filter is engaged**, then using the Modify function will modify every record within the filtered set of data (across multiple pages if applicable).

Modify Selected

1. Filter by the criteria that the employees have in common.

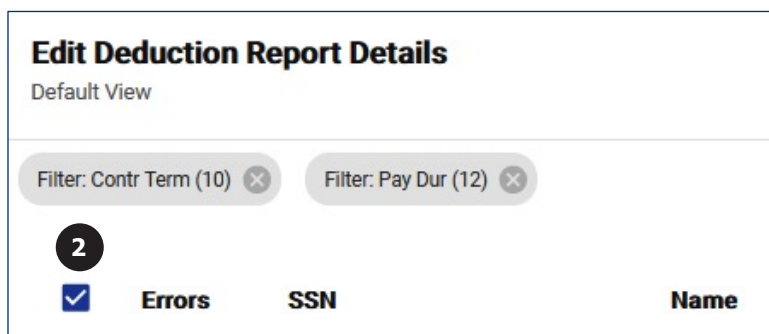
In this case, we're looking for employees who have a Contract Term of "10" and a Pay Duration of "12." These employees should really have a pay duration of LS since your school only offers a lump sum in June.



The screenshot shows a dialog box titled "Edit Deduction Report Details" with a "Default View" label. Below the title, there are two filter buttons, each marked with a circled "1". The first button is labeled "Filter: Contr Term (10)" and the second is labeled "Filter: Pay Dur (12)". Both buttons have a small 'X' icon to their right, indicating they can be removed.

This will bring up all employees in the deduction report who have a Contract Term of "10" and a Pay Dur of "12."

2. Check the box in the column header row.



The screenshot shows the same dialog box as before, but now with a table header row visible below the filter buttons. The first cell in this row contains a checkbox marked with a circled "2" and a checkmark. The subsequent cells in the row are labeled "Errors", "SSN", and "Name".

3. This will select every employee on **the current** page only. If you have multiple pages, you will need to modify and apply the changes one page at a time.

Edit Deduction Report Details
Default View

Filter: Contr Term (10) X Filter: Pay Dur (12) X

<input checked="" type="checkbox"/>	Errors	SSN	Name
<input checked="" type="checkbox"/>	1	XXX-XX-1998	BEDNAR, BRENDA
<input checked="" type="checkbox"/>	1	XXX-XX-1998	BEDNAR, BRENDA
<input checked="" type="checkbox"/>	1	XXX-XX-2011	BUSSEY, BRENDAN
<input checked="" type="checkbox"/>	1	XXX-XX-2011	BUSSEY, BRENDAN
<input checked="" type="checkbox"/>	1	XXX-XX-0064	DESK, DANNY
<input checked="" type="checkbox"/>	1	XXX-XX-0064	DESK, DANNY
<input checked="" type="checkbox"/>	1	XXX-XX-2009	ECONOMICS, ERIN
<input checked="" type="checkbox"/>	1	XXX-XX-0013	GOODE, IRENE
<input checked="" type="checkbox"/>	1	XXX-XX-0013	GOODE, IRENE
<input checked="" type="checkbox"/>	1	XXX-XX-2003	PENCIL, PATRICK

- a. If there is an employee on the list who should not be modified, simply uncheck the Select check box next to their record(s). In this example, Brendan Bussey should not be modified, so his two records have been unselected.

Edit Deduction Report Details
Customized View

Filter: Contr Term (10) X Filter: Pay Dur (12) X

<input type="checkbox"/>	Errors	SSN	Name
<input checked="" type="checkbox"/>	1	XXX-XX-1998	BEDNAR, BRENDA
<input checked="" type="checkbox"/>	1	XXX-XX-1998	BEDNAR, BRENDA
<input type="checkbox"/>	1	XXX-XX-2011	BUSSEY, BRENDAN
<input type="checkbox"/>	1	XXX-XX-2011	BUSSEY, BRENDAN
<input checked="" type="checkbox"/>	1	XXX-XX-0064	DESK, DANNY

- b. There is a call out above the select check box showing how many records will be updated.

Edit Deduction Report Details
Default View

Filter: Contract Term (10) X Filter: Pay Duration (12) X Sort: Name (Ascending) X

8 Errors SSN Name

4. Click **More**, then **Modify Selected**.

Edit Deduction Report Details
Default View

Filter: Contract Term (10) X Filter: Pay Duration (12) X Sort: Name (Ascending) X

Comments Copy Selected Add New Delete Export More Filters X

4 Modify Selected
Modify

	Errors	SSN	Name	Reported Last Name	Reported First Name	Reported Middle Initial	Reported Suffix	Rec Type	Pay Date
<input checked="" type="checkbox"/>		XXX-XX-1998	BEDNAR, BRENDA	BEDNAR	BRENDA			N-Normal	10/14/2022
<input checked="" type="checkbox"/>		XXX-XX-1998	BEDNAR, BRENDA	BEDNAR	BRENDA			N-Normal	10/28/2022
<input type="checkbox"/>		XXX-XX-2011	BUSSEY, BRENDAN	BUSSEY	BRENDAN			N-Normal	10/14/2022
<input type="checkbox"/>		XXX-XX-2011	BUSSEY, BRENDAN	BUSSEY	BRENDAN			N-Normal	10/28/2022
<input checked="" type="checkbox"/>		XXX-XX-0064	DESK, DANNY	DESK	DANNY			N-Normal	10/14/2022
<input checked="" type="checkbox"/>		XXX-XX-0064	DESK, DANNY	DESK	DANNY			N-Normal	10/28/2022

Be sure to click **Modify Selected** since the **Modify** option will modify ALL of the records in the report, not just the employees selected.

5. This message will be displayed.

Confirm

If you have unsaved changes on some records, bulk-modifying will overwrite all unsaved changes. Would you like to proceed?

Yes **No**

- If you have clicked Apply PRIOR to this step, click **Yes**.
- If you have NOT clicked Apply PRIOR to this step, click **No**.
 - Click **Apply** and then start the modify process over.

6. In the *Bulk Modify Selected* popup screen, go to the field that needs to be updated. In this example, we are updating the *Pay Duration* field.

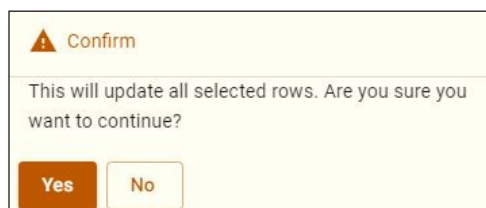
a. Check the box next to the field you need to update.

b. Enter the new value in this field. In this example, we are changing the *Pay Duration* field to “LS” for lump sum.

7. Click **Save**.

*Clicking Save will save the changes to the report. If you have multiple pages to update, you do **not** need to click Apply before moving to the next page.*

8. The following message will be displayed.



- a. If you are ready to modify the data, click **Yes**.
- b. If you need to make additional changes or want to cancel the change, click **No**.

Modify

This function works in two ways:

- If a filter is engaged**, then using the Modify function will modify every record within the filtered set of data (across multiple pages if applicable).
- If no filter is engaged**, then using the Modify function will modify EVERY record in the report.

Modify all records within a filtered subset of data

The Modify function can be used to update each record after a filter has been applied. This will allow you to update each record within the filtered data without having to apply the updates on each page individually.

- Filter by the value that each employee you need to update has in common. In this example, we are looking for any employee that has \$500 listed in the Premium field. 16 records meet this criterion, across two pages.

Edit Deduction Report Details
Customized View

Search: Premium (\$500) 1

	Errors	SSN	Name	Premium	Ineligible	Reported Last Name	Reported First Name	Reported Middle Initial	Reported Suffix	Rec Type	Pay Date	Period Date	Rate	Regular Deduction
<input type="checkbox"/>		XXX-XX-1998		BEDNAR, BRENDA	\$500.00	\$0.00	BEDNAR	BRENDA		N-Normal	10/14/2022	10/01/2022	11.0%	\$388.35
<input type="checkbox"/>		XXX-XX-0008		BIONDOLILLO, BETH	\$500.00	\$0.00	BIOLOGY	BETH		N-Normal	10/14/2022	10/01/2022	11.0%	\$131.13
<input type="checkbox"/>		XXX-XX-2011		BUSSER, BRENDAN	\$500.00	\$0.00	BUSSER	BRENDAN		N-Normal	10/14/2022	10/01/2022	11.0%	\$205.06
<input type="checkbox"/>		XXX-XX-0061		CALCULUS, CHRIS	\$500.00	\$0.00	CALCULUS	CHRIS		N-Normal	10/28/2022	10/01/2022	9.0%	\$382.76
<input type="checkbox"/>		XXX-XX-0064		DESK, DANNY	\$500.00	\$0.00	DESK	DANNY		N-Normal	10/14/2022	10/01/2022	7.0%	\$273.86
<input type="checkbox"/>		XXX-XX-0010		EASEL, EMMA	\$500.00	\$0.00	EASEL	EMMA		N-Normal	10/14/2022	10/01/2022	7.0%	\$210.00
<input type="checkbox"/>		XXX-XX-2009		ECONOMICS, ERIN	\$500.00	\$0.00	ECONOMICS	ERIN		N-Normal	10/28/2022	10/01/2022	11.0%	\$177.65
<input type="checkbox"/>		XXX-XX-0002		GEBRA, AL	\$500.00	\$0.00	GEBRA	AL		N-Normal	10/14/2022	10/01/2022	11.0%	\$275.95
<input type="checkbox"/>		XXX-XX-0013		GROVE, IGENE	\$500.00	\$0.00	GROVE	IGENE		N-Normal	10/14/2022	10/01/2022	11.0%	\$335.03

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Export Exception Report Export Summary Report Cancel Apply Save

- Click **More**, then **Modify**.

Edit Deduction Report Details
Customized View

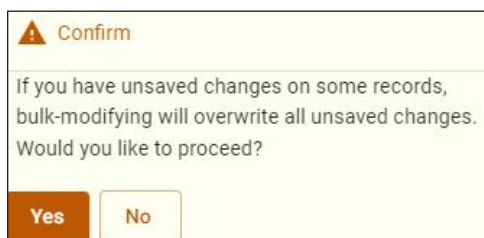
Search: Premium (\$500)

<input type="checkbox"/>		XXX-XX-0008		BIONDOLILLO, BETH	\$500.00	\$0.00	BIOLOGY	BETH		N-Normal	10/14/2022	10/01/2022	11.0%	\$131.13
<input type="checkbox"/>		XXX-XX-2011		BUSSER, BRENDAN	\$500.00	\$0.00	BUSSER	BRENDAN		N-Normal	10/14/2022	10/01/2022	11.0%	\$205.06
<input type="checkbox"/>		XXX-XX-0061		CALCULUS, CHRIS	\$500.00	\$0.00	CALCULUS	CHRIS		N-Normal	10/28/2022	10/01/2022	9.0%	\$382.76
<input type="checkbox"/>		XXX-XX-0064		DESK, DANNY	\$500.00	\$0.00	DESK	DANNY		N-Normal	10/14/2022	10/01/2022	7.0%	\$273.86

2

Modify Selected
Modify

3. This message will be displayed.



- a. If you have clicked Apply PRIOR to this step, click **Yes**.
 - b. If you have NOT clicked Apply PRIOR to this step, click **No**.
 - Click **Apply** and then start the modify process over.
4. In the *Modify Multiple Values* pop up screen that opens, go to the field that needs to be updated. In this example, the \$500 is an ineligible bonus and should be reported in the Ineligible field instead of the Premium field so we are updating the *Premium* and *Ineligible* fields.
- a. Check the box next to the field(s) you need to update.

A screenshot of the "Modify Multiple Values" pop-up screen. A black box with a white letter 'a' highlights the "Premium" and "Ineligible" fields, which are both checked. The "Premium" field shows "\$0.00" and the "Ineligible" field shows "\$500.00". Other fields include "Regular Deduction", "2% Deduction", "Installment", "Service Correct Code", "Base", "Coach", "Retro", "Long", "Stipend", "FTE%", "FTE Code", "Salary", "Position", "Contract Term", "Pay Frequency", "Pay Duration", "Override", "Reported Last Name", "Reported First Name", "Reported Middle Initial", "Reported Suffix", "Rec Type", "Pay Date", and "Period Date". The "SAVE" button is highlighted in blue at the bottom right.

- b. Enter the new values in the appropriate fields.
- c. Click Save.

5. The following message will be displayed.

- a. If you are ready to modify the data, click **Yes**.
- b. If you need to make additional changes or want to cancel the change, click **No**.

- When the modification completes, confirm that the data has been updated to the value you were expecting. In this example, we were updating the Premium field to \$0 and the Ineligible field to \$500 (essentially moving the \$500 that had been in the Premium field to the Ineligible field).

You can see below that the change has been completed.

Name	Premium	Ineligible
BEDNAR, BRENDA	\$0.00	\$500.00
BIONDOLILLO, BETH	\$0.00	\$500.00
BUSSER, BRENDAN	\$0.00	\$500.00
CALCULUS, CHRIS	\$0.00	\$500.00
DESK, DANNY	\$0.00	\$500.00
EASEL, EMMA	\$0.00	\$500.00
ECONOMICS, ERIN	\$0.00	\$500.00
GEBRA, AL	\$0.00	\$500.00

- Clicking Save in the Modify window will save the changes to the database. You do not need to click Apply.

Modify EVERY record in the report

It is very rare that you would need to modify **every** record in a report, but the capability is available if needed.

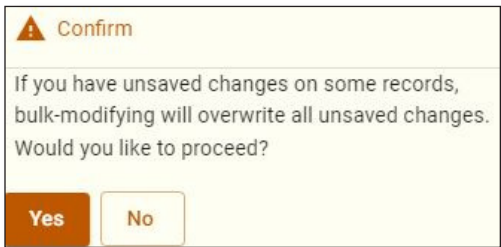
In this example, the base earnings are reported in the *Base* field (correct) and in the *Retro* field (incorrect). The earnings in the *Retro* field need to be changed to “\$0” on every record in the report.

- 1. Click **More**, then **Modify**.



The Base and Retro fields were moved to be next to the Name field for illustrative purposes for this guide.

- 2. This message will be displayed.



- a. If you have clicked Apply PRIOR to this step, click **Yes**.
- b. If you have NOT clicked Apply PRIOR to this step, click **No**.
 - Click **Apply** and then start the modify process over.

3. In the *Modify Multiple Values* pop up screen that opens, go to the field that needs to be updated. In this example, we are updating the *Retro* field.

a. Check the box next to the field you need to update.

Modify Multiple Values

<input type="checkbox"/> Base	<input type="checkbox"/> Regular Deduction	<input type="checkbox"/> FTE%
<input checked="" type="checkbox"/> Retro	<input type="checkbox"/> 2% Deduction	<input type="checkbox"/> FTE Code
<input type="checkbox"/> Reported Last Name	<input type="checkbox"/> Installment	<input type="checkbox"/> Salary
<input type="checkbox"/> Reported First Name	<input type="checkbox"/> Service Correct Code	<input type="checkbox"/> Position
<input type="checkbox"/> Reported Middle Initial	<input type="checkbox"/> Coach	<input type="checkbox"/> Contract Term
<input type="checkbox"/> Reported Suffix	<input type="checkbox"/> Long	<input type="checkbox"/> Pay Frequency
<input type="checkbox"/> Rec Type	<input type="checkbox"/> Stipend	<input type="checkbox"/> Pay Duration
<input type="checkbox"/> Pay Date	<input type="checkbox"/> Premium	<input type="checkbox"/> Override
<input type="checkbox"/> Period Date	<input type="checkbox"/> Ineligible	

SAVE Cancel

- b. Enter the new value in this field. In this example, we are changing the *Retro* field to "0."
- c. Click **Save**.

Modify Multiple Values

<input type="checkbox"/> Base	<input type="checkbox"/> Regular Deduction	<input type="checkbox"/> FTE%
<input checked="" type="checkbox"/> Retro 0.00	<input type="checkbox"/> 2% Deduction	<input type="checkbox"/> FTE Code
<input type="checkbox"/> Reported Last Name	<input type="checkbox"/> Installment	<input type="checkbox"/> Salary
<input type="checkbox"/> Reported First Name	<input type="checkbox"/> Service Correct Code	<input type="checkbox"/> Position
<input type="checkbox"/> Reported Middle Initial	<input type="checkbox"/> Coach	<input type="checkbox"/> Contract Term
<input type="checkbox"/> Reported Suffix	<input type="checkbox"/> Long	<input type="checkbox"/> Pay Frequency
<input type="checkbox"/> Rec Type	<input type="checkbox"/> Stipend	<input type="checkbox"/> Pay Duration
<input type="checkbox"/> Pay Date	<input type="checkbox"/> Premium	<input type="checkbox"/> Override
<input type="checkbox"/> Period Date	<input type="checkbox"/> Ineligible	

SAVE Cancel

4. The following message will be displayed.

Confirm

This will update all selected rows. Are you sure you want to continue?

Yes **No**

- a. If you are ready to modify the data, click **Yes**.
- b. If you need to make additional changes or want to cancel the change, click **No**.

- When the modification completes, confirm that the data has been updated to the value you were expecting. In this example, we were updating the *Retro* field to “0” for every employee in the report.

You can see below that the change has been completed.

Name	Base	Retro
BEDNAR, BRENDA	\$3,338.50	\$0.00
BIONDOLILLO, BETH	\$1,192.06	\$0.00
BOSS, BERNARD	\$4,615.38	\$0.00
BUSSER, BRENDAN	\$1,864.21	\$0.00
CALCULUS, CHRIS	\$3,479.68	\$0.00
DESK, DANNY	\$2,489.64	\$0.00
EASEL, EMMA	\$2,500.00	\$0.00
GEBRA, AL	\$2,508.63	\$0.00
GOODE, IRENE	\$3,045.77	\$0.00
HISTORY, HANK PHD	\$2,682.50	\$0.00

- Clicking Save in the Modify window will save the changes to the database. You do not need to click Apply.