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

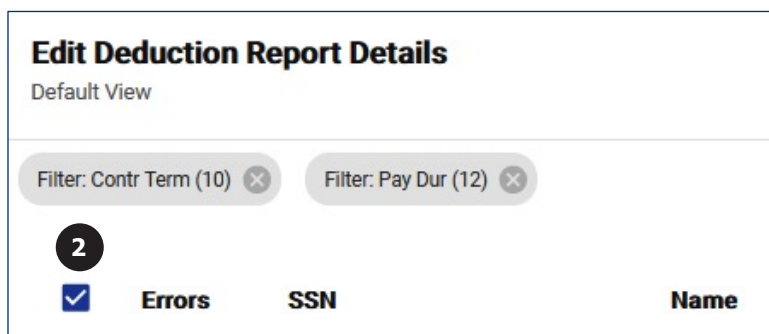1. Filter by the criteria that the employees have in common.

    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.

    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.

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.

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 Busser should not be modified, so his two records have been unselected.

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

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

*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.

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.

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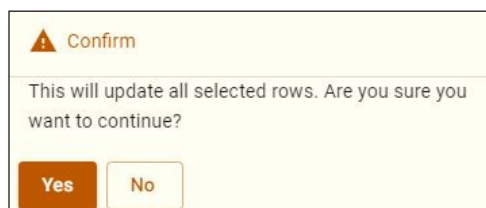
    a. Check the box next to the field you need to update.

    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:

a. **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).

b. **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.

1. 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.

2. Click **More**, then **Modify**.

3. This message will be displayed.
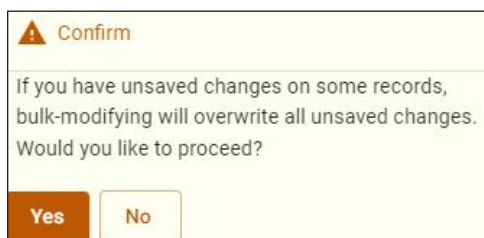
a. If you have clicked Apply PRIOR to this step, click **Yes**.

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.

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**.

6. 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

7. 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.
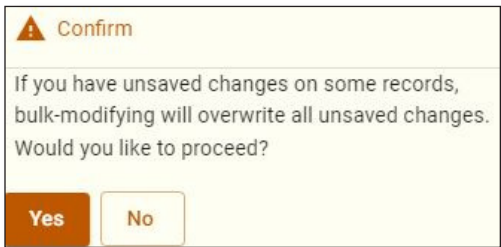
In this example, the base earnings are reported in the *Base* field (correct) and in the *Retro* field (incorrect). The earnings in the *Retro* field need to be changed to "$0" on every record in the report.

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.

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

c. Click **Save**.

4. 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**.

5. 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

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