

Creation and Utilization of a Template Record

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Template records can be created in the USPS-R system and these records will hold recurring data in specific fields that will appear in the record when the template is chosen for record creation.

Available USPS-R Template Objects

The following are objects that are setup with the capability to have template utilization available:

Employee

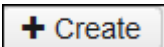
Leaves

Payroll Items

Positions

Multiple template records can be created within one object.

Creating an Employee Template Record

An Employee template record can be created by clicking on the  button. You will then populate any recurring field that may be needed on the record. You can setup multiple template records for different types of employees. Once these fields have been populated you can

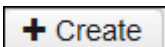
then click on the  button. You will then receive a prompt to

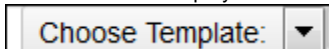


. You will type in the name of your template and then click



Utilization of an Employee Template Record

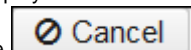
To create a new Employee record using the Employee Templates click . You can then click on



which will allow you to select from the template(s) you created. The data that was previously stored when you created this template will populate on the Employee record you are creating. You can then add the remaining Employee data needed and click

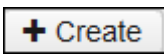


to complete the creation of this record. If you do not want this record saved you can click the



button.

Creating a Position Template Record

A Position template record can be created by clicking on the  button. You will then populate any recurring field that may be needed on the record. You can setup multiple template records for different types of positions. Once these fields have been populated you can

then click on the  button. You will then receive a prompt to





. You will type in the name of your template and then click

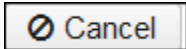


Utilization of a Position Template Record

To create a new Position record using the Position Templates click . Select the employee you are creating this Position record

for. You can then click on  which will allow you to select from the template(s) you created. The data that was previously stored when you created this template will populate on the Position record you are creating. You can then add the remaining Position

data needed and click  to complete the creation of this record. If you do not want this record saved you can click the



button.

Position

Save Cancel Choose Template: Save As Template

Employee:

Position Number Position Description Job Status Appointment Type Assignment Area Building Code Building IRN

Contract Amount Contract Work Days Department Code Eligible For Person Leave Eligible For Sick Leave Eligible For Vacation Experience Current Class

Extended Service Fte Full Time Equivalence Funding Source Code1 Funding Source Code2 Funding Source Code3 High Grade

High Quality Professional Development Hire Date Hours In The Day Low Grade Paraprofessional Paraprofessional Hire Date Percent1

Percent2 Percent3 Position Code Start Date Stop Date Position Status Position Type

Raise Date Reportable to EMIS Retirement Code Separation Date Separation Reason Special Education Full Time Equivalence State Reporting Appointment

Sub Appointment Type Termination Date

Standard Payroll

Payroll Code 1 Payroll Code 2 Payroll Code 3 Payroll Code 4 Payroll Date 1 Payroll Date 2 Payroll Money 1

Payroll Money 2 Payroll Money 3 Payroll Money 4 Payroll Text 1 Payroll Text 2

Standard Personnel

Personnel Code 1 Personnel Code 2 Personnel Code 3 Personnel Code 4 Personnel Date 1 Personnel Date 2 Personnel Money 1

Creating a Leaves Template Record

A Leaves template record can be created by clicking on the **+ Create** button. You will then populate any recurring field that may be needed on the record. You can setup multiple template records for different types of leave. Once these fields have been populated you can then click on the **Save As Template** button. You will then receive a prompt to

Save

You will type in the name of your template and then click **Save**.

Utilization of a Leaves Template Record

To create a new Leaves record using the Leaves Templates click **+ Create**. Select the employee you are creating this Leaves record for. You can then click on **Choose Template:** which will allow you to select from the template(s) you created. The data that was previously stored when you created this template will populate on the Leaves record you are creating. You can then add the remaining Leaves data if needed and click **Save** to complete the creation of this record. If you do not want this record saved you can click the **Cancel** button.

Leaves

Save Cancel Choose Template: Save As Template

Employee *

Sick	Personal	Vacation
Type: SICK	Type: PERSONAL	Type: VACATION
Accum Per Month: 1.250	Accum Per Month:	Accum Per Month: 1.000
Leave Unit: Daily	Leave Unit: Daily	Leave Unit: Daily
Max Leave Amount: 999.990	Max Leave Amount:	Max Leave Amount: 20.000
Reset Value:	Reset Value: 3.000	Reset Value:
Balance:	Balance:	Balance:
<input type="checkbox"/> Accumulate Based On Hour	Begin Balance:	Date Last Accrued:
Advanced Units Used:	Date Last Accrued:	Leave 100 Percent Accrue:
Current Service Hours:	Leave 100 Percent Accrue:	Leave Adjustment:
Date Last Accrued:	Leave Adjustment:	Leave Units Accum Last Pay:
Leave 100 Percent Accrue:	Leave Units Accum Last Pay:	Pending Leave Adjust:
Leave Adjustment:	Pending Leave Adjust:	Units Work Full Accum:
Leave Units Accum Last Pay:	Personal Leave Accum:	User Defined Leave Acc:
Max Advance Leave:	Units Work Full Accum:	
Pending Leave Adjust:	User Defined Leave Acc:	
Service Hours Accumulator:		
Units Work Full Accum:		
User Defined Leave Acc:		

Creating a Payroll Item Template Record

A Payroll Item template record can be created by clicking on the **+ Create** button. You will then populate any recurring field that may be needed on the record. You can setup multiple template records for different types of payroll items. Once these fields have been populated you

can then click on the **Save As Template** button. You will then receive a prompt to



. You will type in the name of your template and then click **Save**.

Utilization of a Payroll Item Template Record

To create a new Payroll Item record using the Payroll Item Templates click **+ Create**. Select the employee and the Payroll Item you are creating this record for. You can then click on **Choose Template:** which will allow you to select from the template(s) you created. The data that was previously stored when you created this template will populate on the Payroll Item record you are creating. You can then add

the remaining Payroll Item data needed and click **Save** to complete the creation of this record. If you do not want this record saved

you can click the **Cancel** button.

Payroll Item

Save
Cancel


Choose Template:
Save As Template

Configuration Annuity, 505, Mickey Mouse Artistry	Employee TAYLOR, ELIZABETH S - 232323232	Position
Type Annuity	Rate Type 	Rate 0.0000
Pay Cycle 	Start Date 	Stop Date
Employer Rate 	Account Number 	Deduct Max Start Date
Max Amount 	Specific Date 	Deduct Max Start Date
Max Amount 	Specific Date 	Last Modified Date

Standard CF

Date 	Code 1 	Code 2
Money 1 	Money 2 	Text

Deleting a Template Record

To delete a Template Record that is no longer needed, click on  next to the Saved Template wanting to delete

temp

trash icon
Save As Template

Position

Save
Cancel

temp
Save As Template

Employee Number: ANON101
Employee Name: Stein, Kay Francis

Position Number 1 	Position Description Temp	Job Status Active	Pay Group 01 - Tan 3	Appointment Type Classified	Building Code 	Department Code
Extended Service 	FTE 	Hire Date 	Start Date 	Stop Date 	Raise Date 	Retirement Code SERS
Sub Appointment Type 	Termination Date 					

Eligibility Flags

☐ Eligible For Personal Leave
☐ Eligible For Sick Leave
☐ Eligible For Vacation Leave

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