Creation and Utilization of a Template Record

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:
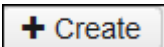
Employee

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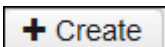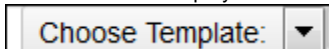
. You will type in the name of your template and then click .

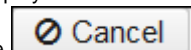## Utilization of an Employee Template Record

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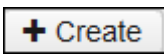
 to complete the creation of this record. If you do not want this record saved you can click the button.

Creating a Position Template Record

A Position template record can be created by clicking on the **+ 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 positions. 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** .
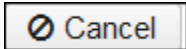
Utilization of a Position Template Record

To create a new Position record using the Position Templates click **+ Create** . Select the employee you are creating this Position 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 Position record you are creating. You can then add the remaining Position 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.

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

. 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.

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.

Deleting a Template Record

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

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