

BUSINESS OFFICE TASKGROUP & TASK PROFILE TRAINING GUIDE

Revised: January 2020

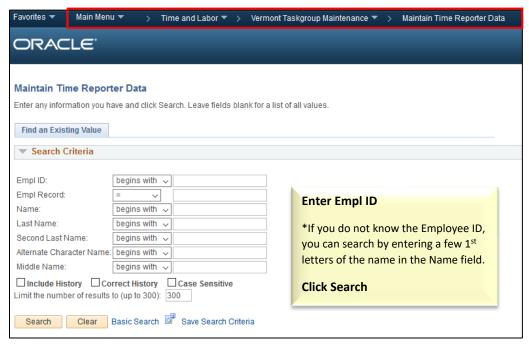
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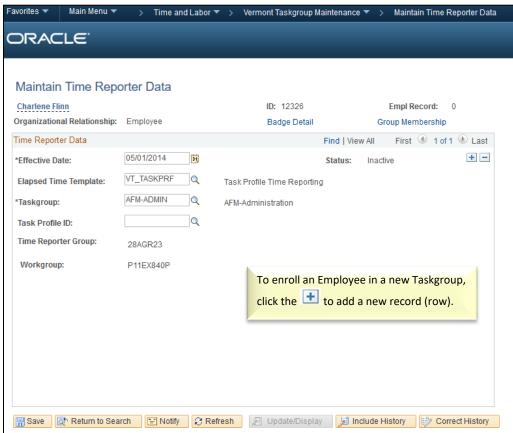
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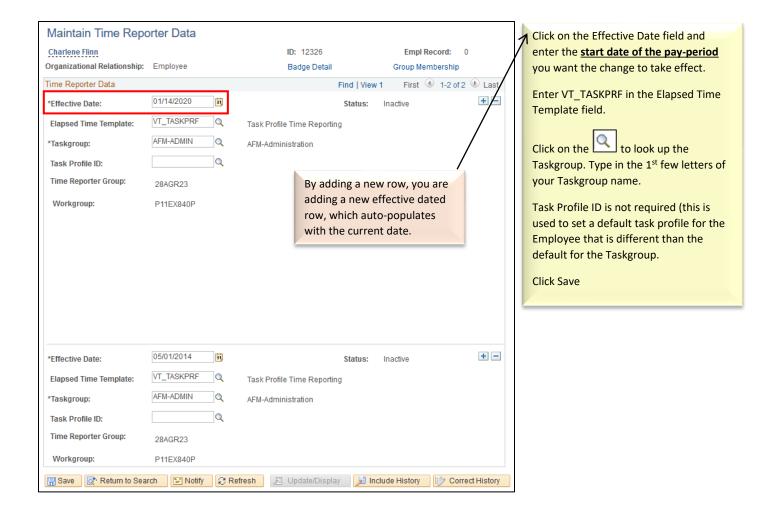
Enrolling an Employee in an existing Taskgroup

<u>Note</u>: This guide is for enrolling an employee in a Taskgroup. This lesson assumes the Taskgroup already exists and has Task Profiles assigned. This procedure is required for an employee to report time using a Task Profile.

Navigate to: Main Menu > Time and Labor > Vermont Taskgroup Maintenance > Maintain Time Reporter Data





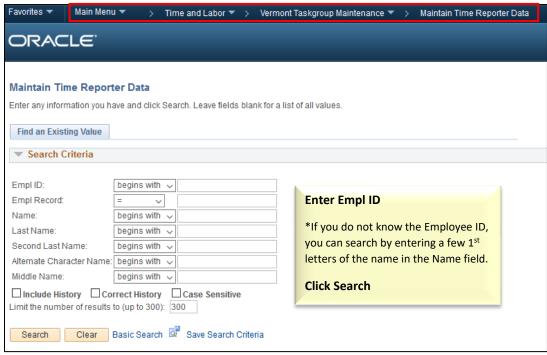


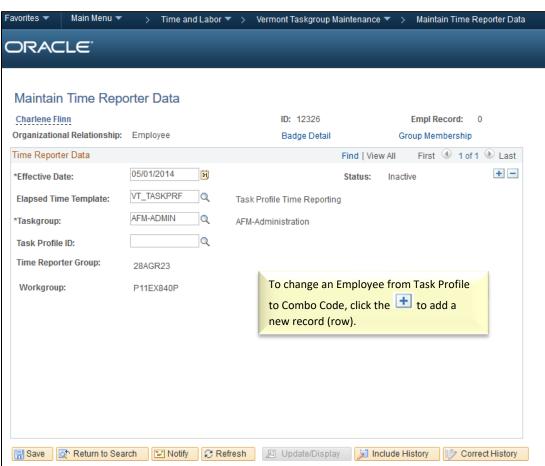
This Employee is now Successfully Enrolled into a Taskgroup.

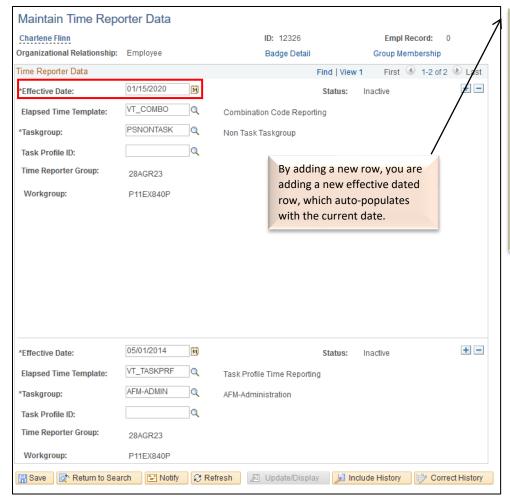
Changing an Employee from Task Profile to a Combo Code Reporter

Note: This guide is used to change an employee who currently uses Task Profiles to use Combo Codes when reporting time.

Navigate to: Main Menu > Time and Labor > Vermont Taskgroup Maintenance > Maintain Time Reporter Data







Click on the Effective Date field and enter the start date of the pay-period you want the change to take effect.

Enter VT_COMBO in the Elapsed Time Template field.

Enter PSNONTASK in the Taskgroup field.

Note: PSNONTASK must be used when Combo Codes are used on the timesheet.

Task Profile ID is left blank.

Click Save

This Employee is now changed from Task Profile Reporter to Combo Code Reporter.

Task Profile(s) & Taskgroups

This section describes the steps necessary to create and maintain Task Profiles and Taskgroups.

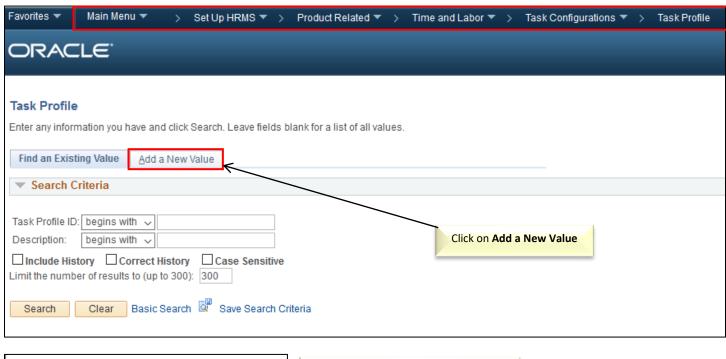
Creating a Task Profile

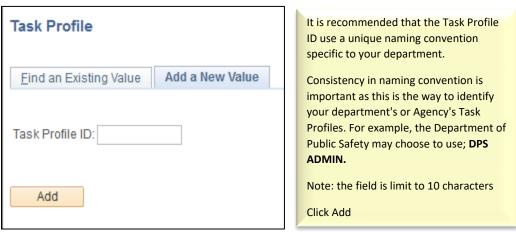
<u>Note</u>: With this guide you will learn how to create a Task Profile. Task Profiles are maintained by departments, specifically by the Business Office security role. A Task Profile is an alphanumeric value that is tied to one or more combo codes (one task profile may represent a fund split). Task Profiles are assigned to Taskgroups. One Task Profile can be used in several Taskgroups.

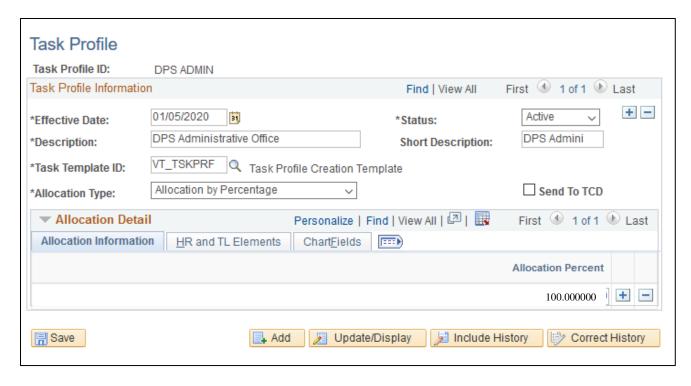
Each Taskgroup has one default Task Profile, additionally a default Task Profile can be set at the employee level. Time is charged to the Task Profile selected with the Taskgroup if (1) the employee does not select a Task Profile on the timesheet and (2) the employee does not have a default Task Profile on his/her Maintain Time Reporter page.

*If you need to change the name of an already existing Task Profile, it is best to follow this lesson to create a new one rather than change an existing one.

Navigate to: Main Menu > Set Up HRMS > Product Related > Time and Labor > Task Configurations > Task Profile







Enter the Effective Date of your Task Profile. Note: This must be the first date of pay period.

Enter a description of the Task Profile in the **Description** field.

Enter VT_TSKPRF in the Task Template ID field

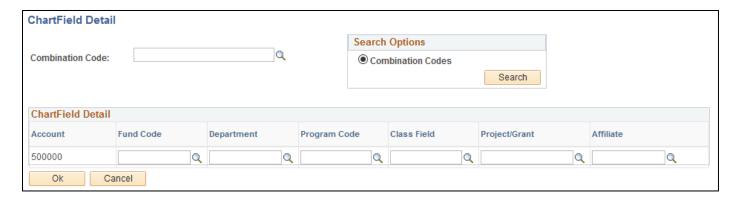
Allocation Type should be Allocation by Percentage, then enter your Allocation Percent under the Allocation Information tab.



Under the HR and TL Elements tab, Enter your GL Business Unit



Go to the **Chartfields** tab and link on the **ChartFields** hyperlink



Enter the Combination Code (if you know it), otherwise enter the appropriate information in the ChartField detail section to retrieve it.

Click OK

Task Profile				
Task Profile ID:	DPS ADMIN			
Task Profile Information	n		Find View All	First 1 of 1 Last
*Effective Date: *Description:	01/05/2020 III		*Status: Short Description:	Active DPS Admini
*Task Template ID:	VT_TSKPRF Q Task Pro	ofile Creation	Template	
*Allocation Type:	Allocation by Percentage	~		☐ Send To TCD
▼ Allocation Deta	il	Personalize	Find View All 💷 🏢	First 🕚 1 of 1 🕑 Last
Allocation Information	HR and TL Elements	ChartFields		
Combination Code			ChartFields	
000344941		Q	ChartFields	+ -
Save	Add	J Upda	ate/Display 🗾 Include H	listory Ocrrect History

The **Send to TCD** is not used by the SOV, **DO NOT** check this box.

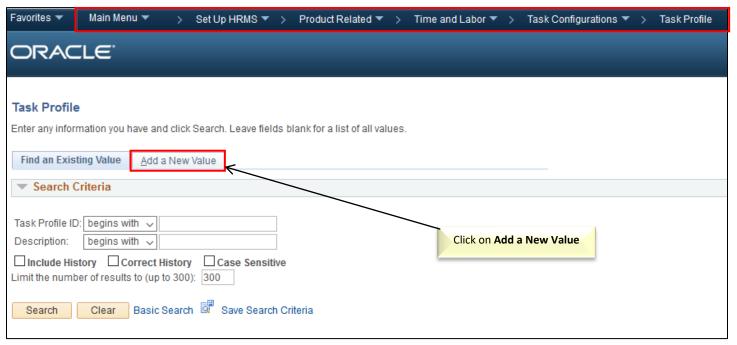
Click Save.

Creating a Task Profile is complete

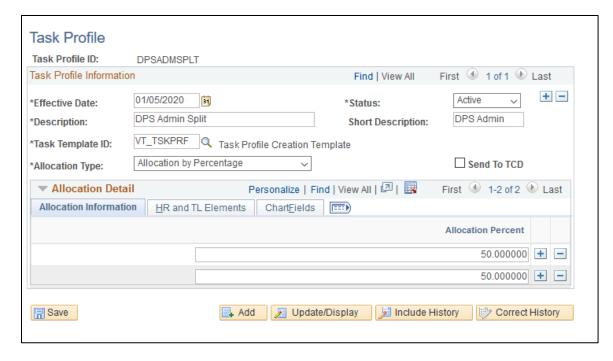
Creating a Split Task Profile

<u>Note</u>: This guide is used to create a Split Task Profile for time reporting, this allows you to use a combination of chartfield and percentages.

Navigate to: Main Menu > Set Up HRMS > Product Related > Time and Labor > Task Configurations > Task Profile







Enter the Effective Date of your Task Profile. Note: This must be the first date of pay period.

To make a change to a Task Profile, you must add an effective dated row! Changes include:

- Adding or deleting a Task Profile ID
 - Inactivating or activating a Task Group
 - Modifying the description (for this we recommend just creating a new Task Profile)

Add the row by clicking on 🛨 the button in the Task Profile Information box.

Enter a description of the Task Profile in the **Description** field.

Enter VT_TSKPRF in the Task Template ID field

Allocation Type should be Allocation by Percentage, enter the Allocation Percentage(s) under the Allocation Information tab.

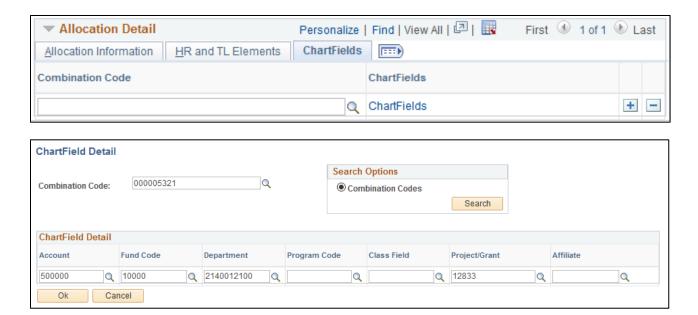
Add additional lines for the needed number of splits. You can add however many you need as long as they total 100%

The **Send to TCD** is not used by the SOV, **DO NOT** check this box.

Under the HR and TL Elements tab, Enter your GL Business Unit under each allocation.

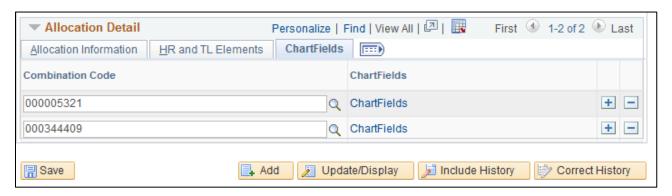


Go to the **Chartfields** tab and link on the **ChartFields** hyperlink



Enter the Combination Code (if you know it), otherwise enter the appropriate information in the ChartField detail section to retrieve it. **Click OK**

Note: You will need to go through this process for each Allocation Percentage line.



Once complete, Click Save.

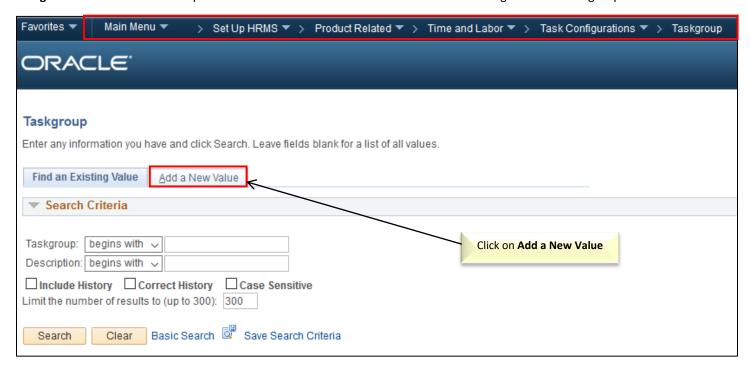
Creating a Split Task Profile is complete

Creating a Taskgroup

<u>Note</u>: A Taskgroup is created when one or more Task Profiles need to be assigned to an Employee. Only one Taskgroup can be assigned to an Employee.

*If you need to change the name of an already existing Taskgroup, it is best to follow this lesson to create a new one rather than change an existing one.

Navigate to: Main Menu > Set Up HRMS > Product Related > Time and Labor > Task Configurations > Taskgroup



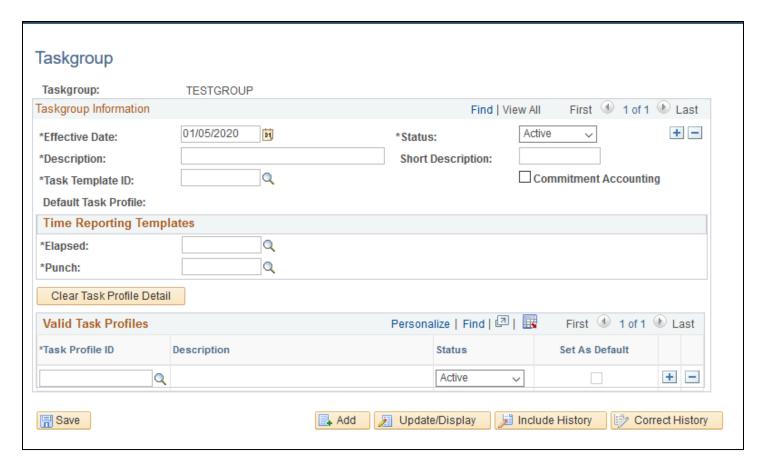


It is recommended that the Taskgroup name use a unique naming convention specific to your department.

Consistency in naming convention is important as while your Taskgroups are for use by your department, all Taskgroups can be seen by all Business office's, statewide.

Note: the field is limit to 10 characters

Click Add



Enter the **Effective Date** of your Task Profile. <u>Note</u>: This must be the first date of pay period.

To make a change to a Task Group, you must add an effective dated row!

Changes include:

- Adding or deleting a Task Profile ID
- Inactivating or activating a Task Group
- Modifying the description (for this we recommend just creating a new Taskgroup)

Add the row by clicking on the 🛅 button in the Taskgroup Information box.

Enter a description of the Taskgroup in the **Description** field. It is recommended you use a description that identifies your Business Office.

Enter VT_TSKPRF in the Task Template ID field

Enter VT_TASKPRF in the Elapsed field

Enter PSPCH_NONE in the Punch field

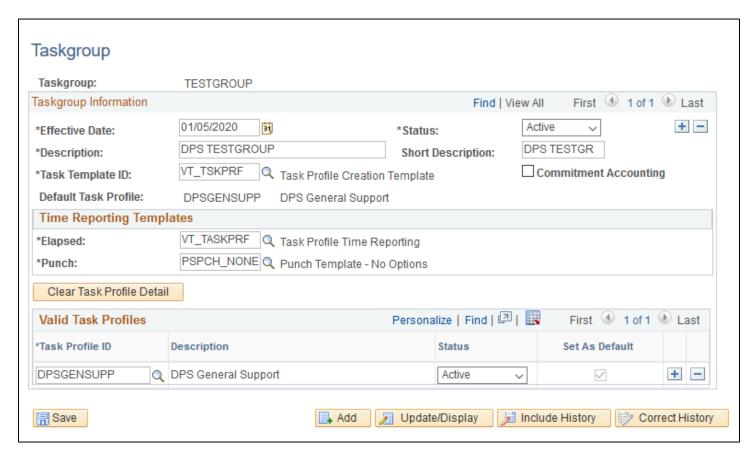
Click the to look up **Task Profile ID** or enter the ID if you know it.

Click the **Set As Default** option.

• Note: One Task Profile must be selected as the default. This default task profile is where the time will be charged if the employee leaves the task profile field blank on a time sheet row or if there isn't a default task profile assigned to the employee on the Maintain Time Reporter Page.

Multiple **Task Profile IDs** can be assigned to a Taskgroup. To add another Task Profile, click the button in the Valid Task Profiles box.

Note: Do not use the Clear Task Profile Detail button and the Commitment Accounting option is not used so, do not check this box.



Click the Save button.

Creating a Taskgroup is complete