

# BUSINESS OFFICE TASKGROUP & TASK PROFILE TRAINING GUIDE

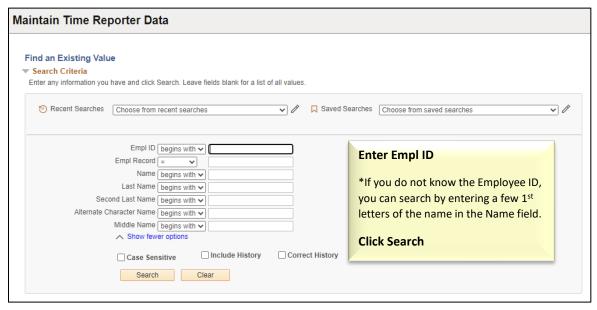
# **Table of Contents**

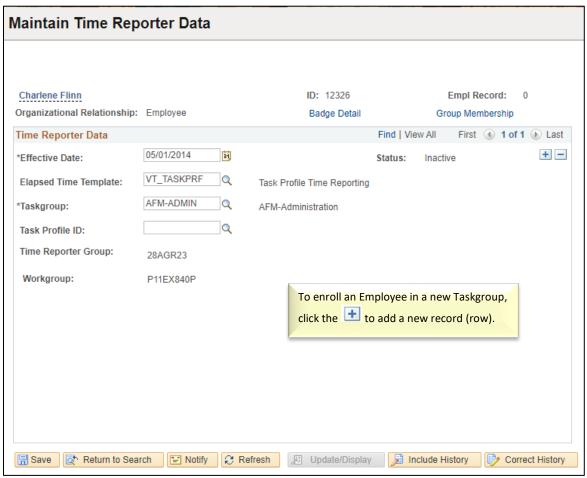
Enrolling an Employee in an existing Taskgroup	3
Changing an Employee from Task Profile to a Combo Code Reporter	5
Task Profile(s) & Taskgroups	7
Creating a Task Profile	7
Creating a Split Task Profile	10
Creating a Taskgroup	13

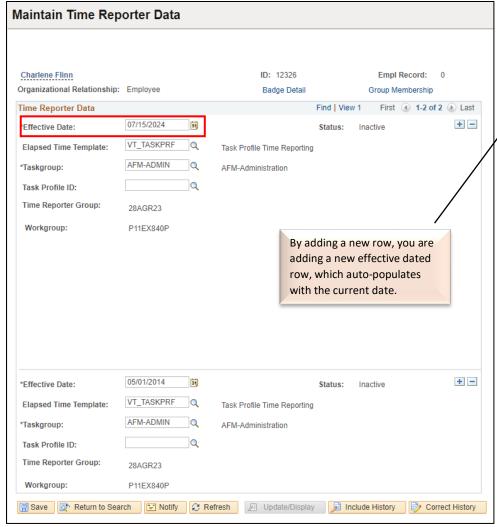
# Enrolling an Employee in an existing Taskgroup

<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: NavBar: 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\_TASKPRF in the Elapsed Time Template field.

Click on the to look up the Taskgroup. Type in the 1st few letters of your Taskgroup name.

Task Profile ID is not required (this is used to set a default task profile for the Employee that is different than the default for the Taskgroup.

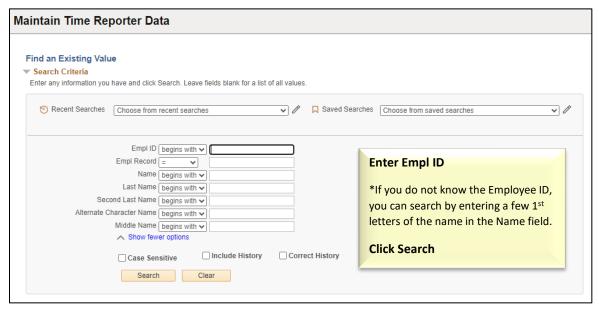
Click Save

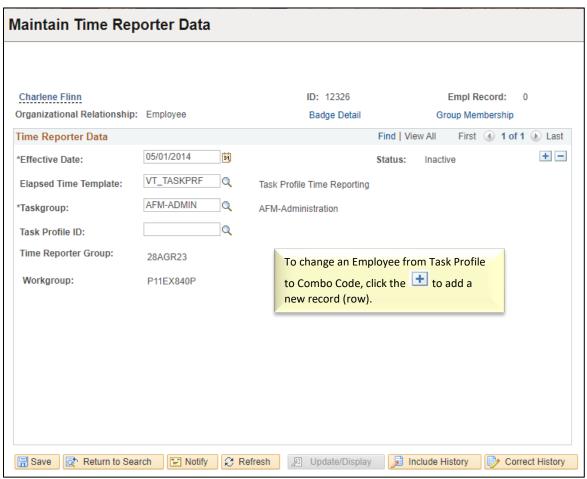
This Employee is now Successfully Enrolled into a Taskgroup.

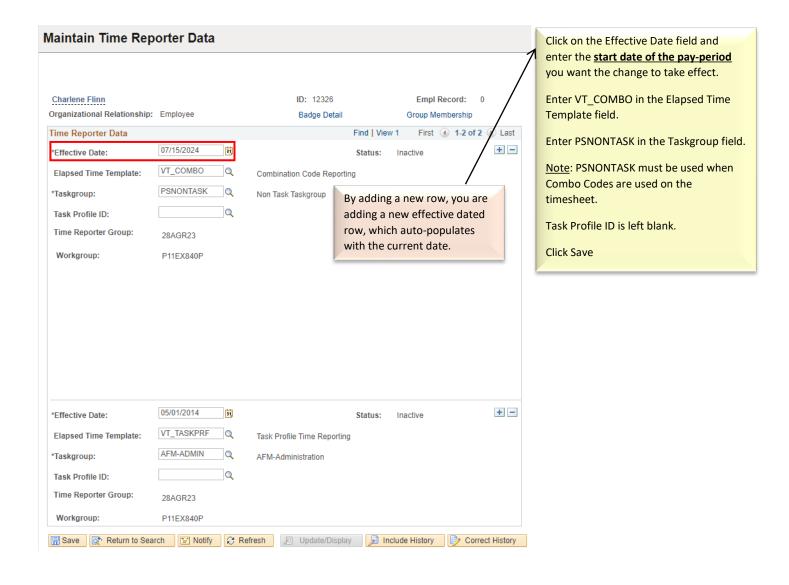
# Changing an Employee from Task Profile to a Combo Code Reporter

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

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







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.

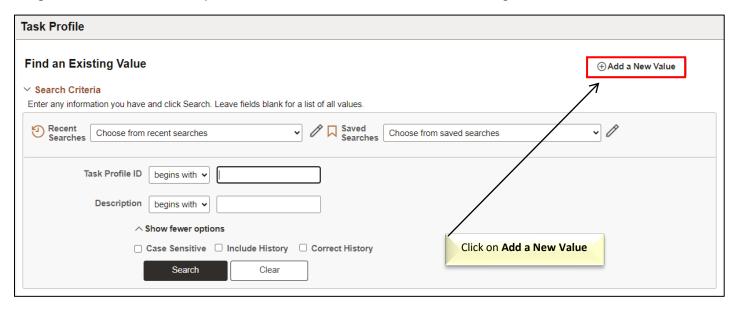
#### Creating a Task Profile

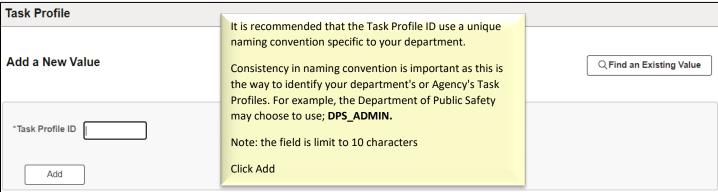
<u>Note</u>: With this guide you will learn how to create a Task Profile. Task Profiles are maintained by departments, specifically by the Business Office security role. A Task Profile is an alphanumeric value that is tied to one or more combo codes (one task profile may represent a fund split). Task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

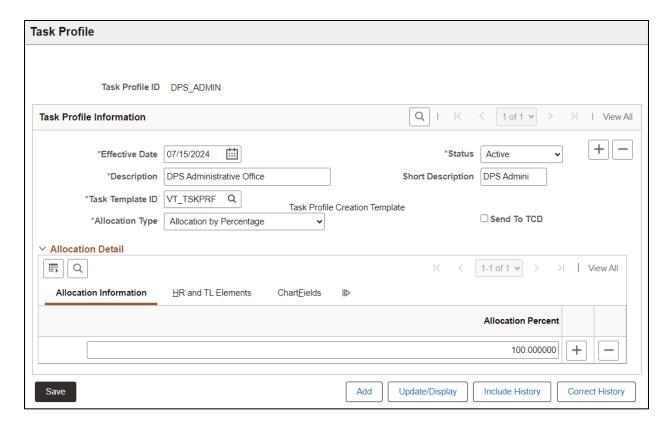
Each Taskgroup has one default Task Profile, additionally a default Task Profile can be set at the employee level. Time is charged to the Task Profile selected with the Taskgroup if (1) the employee does not select a Task Profile on the timesheet and (2) the employee does not have a default Task Profile 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: NavBar: Menu > Set Up HCM > Product Related > Time and Labor > Task Configurations > Task Profile





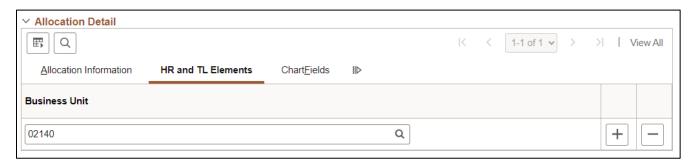


Enter the Effective Date of your Task Profile. Note: This must be the first date of pay period.

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

Enter VT\_TSKPRF in the Task Template ID field

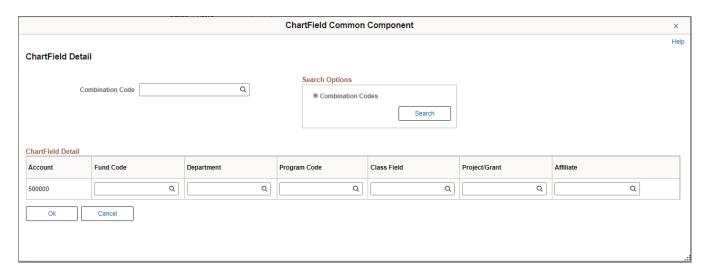
Allocation Type should be Allocation by Percentage, then enter your Allocation Percent under the Allocation Information tab.



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

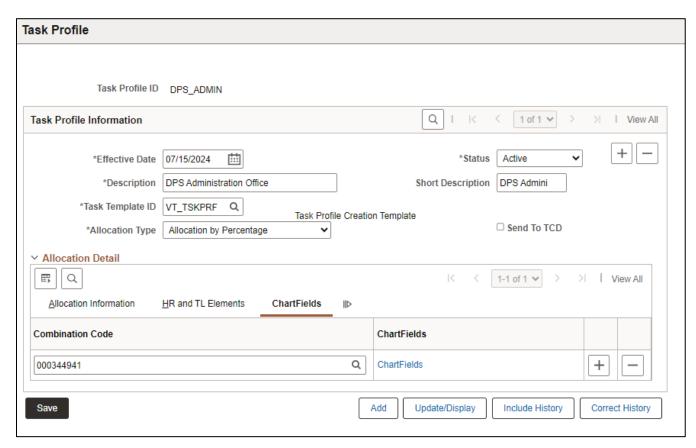


Go to the Chartfields tab and link on the ChartFields hyperlink



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

#### Click OK



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

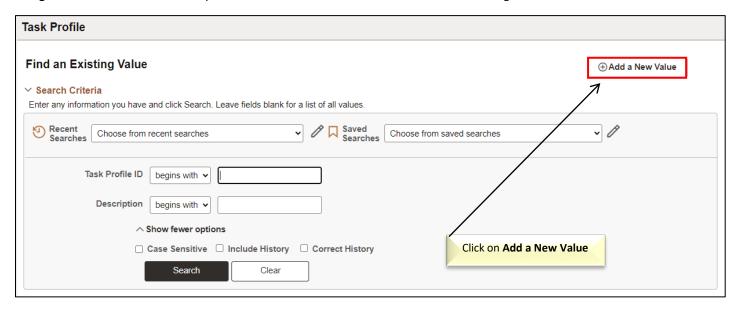
Click Save.

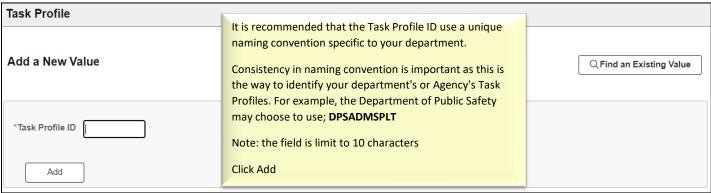
**Creating a Task Profile is complete** 

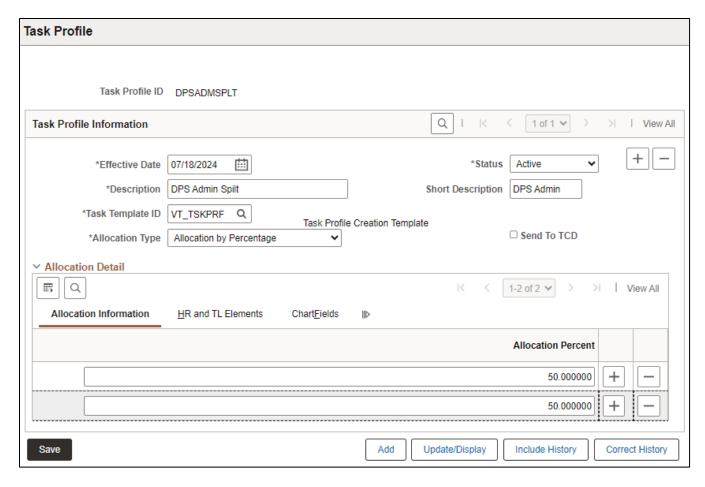
## Creating a Split Task Profile

<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: NavBar: Menu > Set Up HCM > 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.

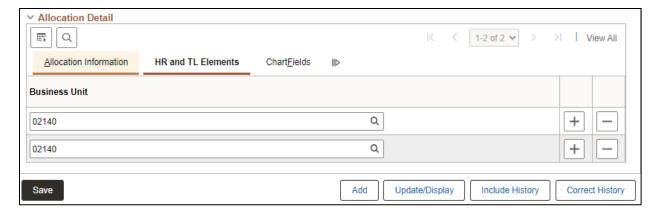
Enter VT\_TSKPRF in the Task Template ID field

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%

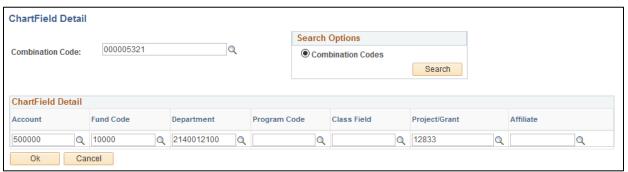
The **Send to TCD** is not used by the SOV, **DO NOT** check this box.

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.

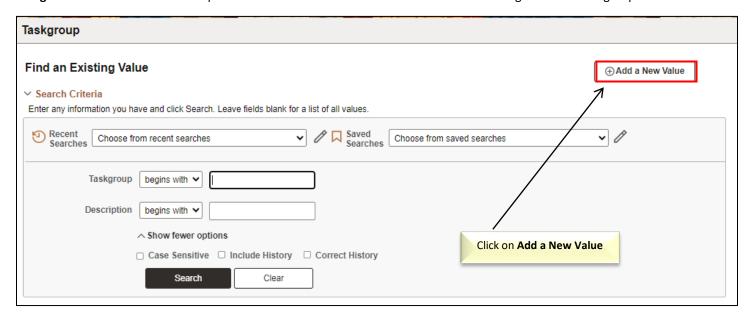
**Creating a Split Task Profile is complete** 

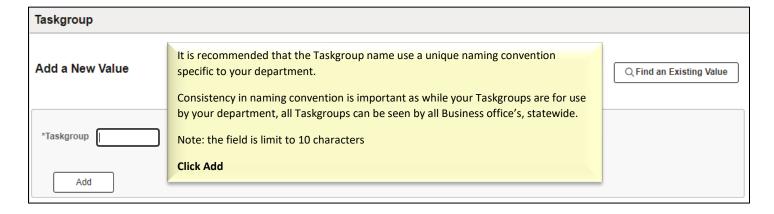
## Creating a Taskgroup

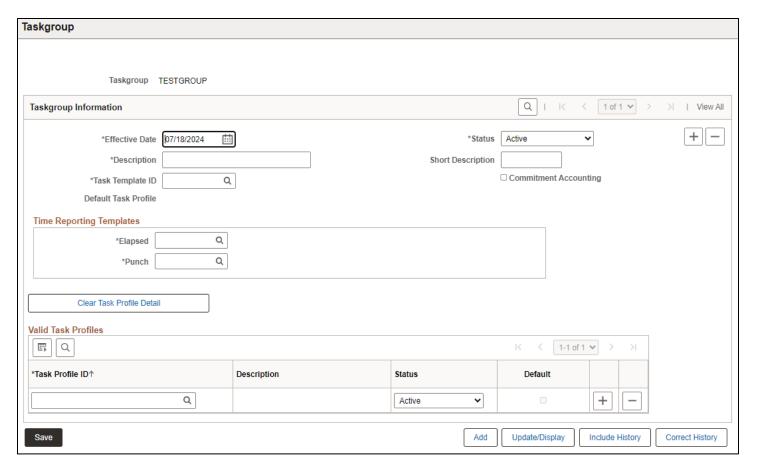
<u>Note</u>: A Taskgroup is created when one or more Task Profiles need to be assigned to an Employee. Only one Taskgroup can be assigned to an Employee.

\*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: NavBar: Menu > Set Up HRMS > Product Related > Time and Labor > Task Configurations > Taskgroup







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 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

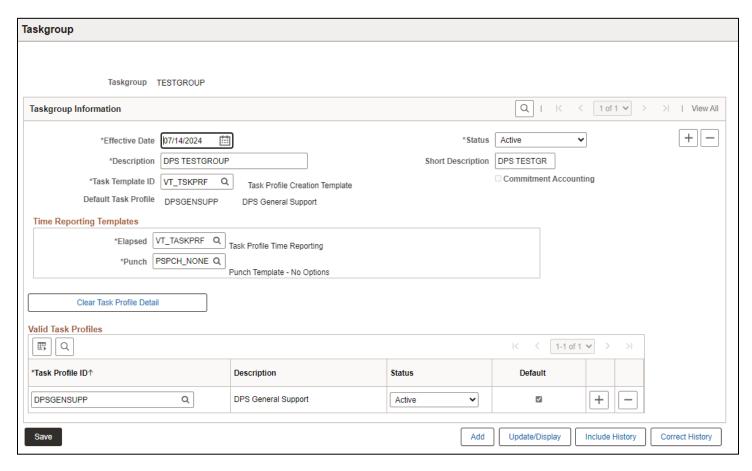
Click the \( \bigcirc \) to look up **Task Profile ID** or enter the ID if you know it.

#### 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