



**BUSINESS OFFICE  
TASKGROUP & TASK PROFILE  
TRAINING GUIDE**

# Table of Contents

<b>Enrolling an Employee in an existing Taskgroup .....</b>	<b>3</b>
<b>Changing an Employee from Task Profile to a Combo Code Reporter .....</b>	<b>5</b>
<b>Task Profile(s) &amp; Taskgroups.....</b>	<b>7</b>
<b>Creating a Task Profile .....</b>	<b>7</b>
<b>Creating a Split Task Profile .....</b>	<b>10</b>
<b>Creating a Taskgroup .....</b>	<b>13</b>

## Enrolling an Employee in an existing Taskgroup

**Note:** 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

### Maintain Time Reporter Data

**Find an Existing Value**

▼ **Search Criteria**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches  Saved Searches

Empl ID    
Empl Record    
Name    
Last Name    
Second Last Name    
Alternate Character Name    
Middle Name    
[Show fewer options](#)

Case Sensitive    Include History    Correct History

**Enter Empl ID**

\*If you do not know the Employee ID, you can search by entering a few 1<sup>st</sup> letters of the name in the Name field.

**Click Search**

### Maintain Time Reporter Data

[Charlene Flinn](#)   ID: 12326   Empl Record: 0  
Organizational Relationship: Employee   [Badge Detail](#)   [Group Membership](#)

**Time Reporter Data**   [Find](#) | [View All](#)   First 1 of 1 Last

\*Effective Date:     Status: Inactive

Elapsed Time Template:     Task Profile Time Reporting

\*Taskgroup:     AFM-Administration

Task Profile ID:

Time Reporter Group: 28AGR23

Workgroup: P11EX840P

To enroll an Employee in a new Taskgroup, click the  to add a new record (row).

### Maintain Time Reporter Data

Charlene Flinn ID: 12326 Empl Record: 0  
 Organizational Relationship: Employee Badge Detail Group Membership

**Time Reporter Data** Find | View 1 First 1-2 of 2 Last

*Effective Date:	07/15/2024	Status:	Inactive
Elapsed Time Template:	VT_TASKPRF	Task Profile Time Reporting	
*Taskgroup:	AFM-ADMIN	AFM-Administration	
Task Profile ID:			
Time Reporter Group:	28AGR23		
Workgroup:	P11EX840P		


By adding a new row, you are adding a new effective dated row, which auto-populates with the current date.

*Effective Date:	05/01/2014	Status:	Inactive
Elapsed Time Template:	VT_TASKPRF	Task Profile Time Reporting	
*Taskgroup:	AFM-ADMIN	AFM-Administration	
Task Profile ID:			
Time Reporter Group:	28AGR23		
Workgroup:	P11EX840P		

Save Return to Search Notify Refresh Update/Display Include History Correct History

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 1<sup>st</sup> 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

### Maintain Time Reporter Data

**Find an Existing Value**

**Search Criteria**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches: Choose from recent searches  Saved Searches: Choose from saved searches

Empl ID: begins with   
Empl Record: =   
Name: begins with   
Last Name: begins with   
Second Last Name: begins with   
Alternate Character Name: begins with   
Middle Name: begins with   
[Show fewer options](#)

Case Sensitive    Include History    Correct History

**Enter Empl ID**

\*If you do not know the Employee ID, you can search by entering a few 1<sup>st</sup> letters of the name in the Name field.

**Click Search**

### Maintain Time Reporter Data

[Charlene Flinn](#)   ID: 12326   Empl Record: 0  
Organizational Relationship: Employee   [Badge Detail](#)   [Group Membership](#)

**Time Reporter Data**   Find | View All   First 1 of 1 Last

\*Effective Date: 05/01/2014   Status: Inactive

Elapsed Time Template: VT\_TASKPRF   Task Profile Time Reporting

\*Taskgroup: AFM-ADMIN   AFM-Administration

Task Profile ID:

Time Reporter Group: 28AGR23

Workgroup: P11EX840P

To change an Employee from Task Profile to Combo Code, click the  to add a new record (row).

## Maintain Time Reporter Data

Charlene Flinn  
Organizational Relationship: Employee

ID: 12326  
Badge Detail

Empl Record: 0  
Group Membership

**Time Reporter Data** Find | View 1 First 1-2 of 2 Last

*Effective Date:	07/15/2024	Status:	Inactive
Elapsed Time Template:	VT_COMBO	Combination Code Reporting	
*Taskgroup:	PSNONTASK	Non Task Taskgroup	
Task Profile ID:			
Time Reporter Group:	28AGR23		
Workgroup:	P11EX840P		

\*Effective Date: 05/01/2014 Status: Inactive

Elapsed Time Template:	VT_TASKPRF	Task Profile Time Reporting	
*Taskgroup:	AFM-ADMIN	AFM-Administration	
Task Profile ID:			
Time Reporter Group:	28AGR23		
Workgroup:	P11EX840P		

Save Return to Search Notify Refresh Update/Display Include History Correct History

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

By adding a new row, you are adding a new effective dated row, which auto-populates with the current date.

**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

**Note:** 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

### Task Profile

#### Find an Existing Value

⊕ Add a New Value

▼ Search Criteria  
Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches Choose from recent searches  Saved Searches Choose from saved searches

Task Profile ID begins with

Description begins with

^ Show fewer options

Case Sensitive  Include History  Correct History

Click on **Add a New Value**

### Task Profile

#### Add a New Value

\*Task Profile ID

It is recommended that the Task Profile ID use a unique naming convention specific to your department.

Consistency in naming convention is important as this is the way to identify your department's or Agency's Task Profiles. For example, the Department of Public Safety may choose to use; **DPS\_ADMIN**.

Note: the field is limit to 10 characters

Click Add

**Task Profile**

Task Profile ID DPS\_ADMIN

**Task Profile Information** 1 of 1 [View All](#)

\*Effective Date 07/15/2024   \*Status Active

\*Description DPS Administrative Office Short Description DPS Admini

\*Task Template ID VT\_TSKPRF   Task Profile Creation Template

\*Allocation Type Allocation by Percentage

▼ **Allocation Detail** 1-1 of 1 [View All](#)

Allocation Information HR and TL Elements ChartFields

Allocation Percent		
100.000000	<input type="button" value="+"/>	<input type="button" value="-"/>

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.

▼ **Allocation Detail** 1-1 of 1 [View All](#)

Allocation Information **HR and TL Elements** ChartFields

Business Unit		
02140 <input type="button" value="Search"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

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

▼ **Allocation Detail** 1-1 of 1 [View All](#)

Allocation Information HR and TL Elements **ChartFields**

Combination Code	ChartFields		
<input type="text"/> <input type="button" value="Search"/>	ChartFields	<input type="button" value="+"/>	<input type="button" value="-"/>

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



**ChartField Common Component**

[Help](#)

**ChartField Detail**

Combination Code

**Search Options**

Combination Codes

**ChartField Detail**

Account	Fund Code	Department	Program Code	Class Field	Project/Grant	Affiliate
500000	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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**  | < < 1 of 1 > > | View All

\*Effective Date   \*Status

\*Description  Short Description

\*Task Template ID   Task Profile Creation Template

\*Allocation Type   Send To TCD

**Allocation Detail**

< < 1-1 of 1 > > | View All

Allocation Information HR and TL Elements **ChartFields**

Combination Code	ChartFields		
<input type="text" value="000344941"/> <input type="button" value="Q"/>	ChartFields	<input type="button" value="+"/>	<input type="button" value="-"/>

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

Note: 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

### Task Profile

#### Find an Existing Value

**⊕ Add a New Value**

▼ **Search Criteria**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Recent Searches** Choose from recent searches ▼ **Saved Searches** Choose from saved searches ▼

Task Profile ID begins with ▼

Description begins with ▼

^ Show fewer options

Case Sensitive  Include History  Correct History

**Search**

Click on **Add a New Value**

### Task Profile

#### Add a New Value

**\*Task Profile ID**

**Add**

It is recommended that the Task Profile ID use a unique naming convention specific to your department.

Consistency in naming convention is important as this is the way to identify your department's or Agency's Task Profiles. For example, the Department of Public Safety may choose to use; **DPSADMSPLT**

Note: the field is limit to 10 characters

Click Add

**Task Profile**

Task Profile ID DPSADMSPLT

**Task Profile Information** Q | ⏪ < 1 of 1 > ⏩ | View All

\*Effective Date 07/18/2024 📅 \*Status Active ⌵ + -

\*Description DPS Admin Split Short Description DPS Admin

\*Task Template ID VT\_TSKPRF Q Task Profile Creation Template

\*Allocation Type Allocation by Percentage ⌵  Send To TCD

∨ **Allocation Detail**

📄 Q ⏪ < 1-2 of 2 > ⏩ | View All

**Allocation Information** **HR and TL Elements** **ChartFields** ▶▶

	Allocation Percent		
	50.000000	+	-
	50.000000	+	-

**Save** Add Update/Display Include History Correct History

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.

Allocation Detail

Allocation Information | **HR and TL Elements** | ChartFields

Business Unit		
02140	+	-
02140	+	-

Save Add Update/Display Include History Correct History

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

Allocation Detail

Allocation Information | HR and TL Elements | **ChartFields**

Combination Code	ChartFields		
	ChartFields	+	-
	ChartFields	+	-

ChartField Detail

Combination Code: 000005321

Search Options  
 Combination Codes  
 Search

Account	Fund Code	Department	Program Code	Class Field	Project/Grant	Affiliate
500000	10000	2140012100			12833	

Ok Cancel

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.)

Allocation Detail

Allocation Information | HR and TL Elements | **ChartFields**

Combination Code	ChartFields		
000005321	ChartFields	+	-
000344409	ChartFields	+	-

Once complete, **Click Save**.

### Creating a Split Task Profile is complete

## Creating a Taskgroup

**Note:** 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

### Taskgroup

#### Find an Existing Value

**+ Add a New Value**

**Search Criteria**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches Choose from recent searches Saved Searches Choose from saved searches

Taskgroup begins with  
Description begins with

^ Show fewer options  
 Case Sensitive  Include History  Correct History

Search Clear

Click on **Add a New Value**

### Taskgroup

#### Add a New Value

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**





\*Taskgroup  
Add

Find an Existing Value


**Taskgroup**

Taskgroup TESTGROUP

**Taskgroup Information** Q | < > 1 of 1 > | View All


\*Effective Date   \*Status    


\*Description  Short Description

\*Task Template ID    Commitment Accounting

Default Task Profile



**Time Reporting Templates**





\*Elapsed  

\*Punch  

[Clear Task Profile Detail](#)

**Valid Task Profiles**

  < > 1-1 of 1 > | > |


*Task Profile ID↑	Description	Status	Default		
<input type="text"/> 		<input type="text" value="Active"/> 	<input type="checkbox"/>		

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  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.

**Taskgroup**

Taskgroup TESTGROUP

**Taskgroup Information** 1 of 1 [View All](#)

\*Effective Date: 07/14/2024    
\*Description: DPS TESTGROUP   
\*Task Template ID: VT\_TSKPRF  Task Profile Creation Template  
Default Task Profile: DPSEGENSUPP DPS General Support  
\*Status: Active     
Short Description: DPS TESTGR   
 Commitment Accounting

**Time Reporting Templates**

\*Elapsed: VT\_TASKPRF  Task Profile Time Reporting  
\*Punch: PSPCH\_NONE  Punch Template - No Options

**Valid Task Profiles** 1-1 of 1 [View All](#)

*Task Profile ID↑	Description	Status	Default		
DPSEGENSUPP <input type="text"/>	DPS General Support	Active <input type="text"/>	<input checked="" type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Click the **Save** button.

**Creating a Taskgroup is complete**