**BUSINESS OFFICE**

**TASKGROUP & TASK PROFILE**

**TRAINING GUIDE**

Revised: January 2020

# Table of Contents

# 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

| Favorites ▼ | Main Menu ▼ | > | Time and Labor ▼ | > | Vermont Taskgroup Maintenance ▼ | > | Maintain Time Reporter Data |

## ORACLE

### Maintain Time Reporter Data
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

▼ **Search Criteria**

| | | |
|---|---|---|
| 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 ▼ | |

☐ Include History   ☐ Correct History   ☐ Case Sensitive
Limit the number of results to (up to 300): 300

[ Search ]   [ Clear ]   Basic Search   Save Search Criteria

> **Enter Empl ID**
>
> *If you do not know the Employee ID, you can search by entering a few 1st letters of the name in the Name field.
>
> **Click Search**

| Favorites ▼ | Main Menu ▼ | > | Time and Labor ▼ | > | Vermont Taskgroup Maintenance ▼ | > | Maintain Time Reporter Data |

## ORACLE

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

🖫 Save   🔙 Return to Search   📧 Notify   🔄 Refresh   |   Update/Display   📄 Include History   📝 Correct History

## 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:          01/14/2020 📅          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

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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

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**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



Favorites ▾   Main Menu ▾   >   Time and Labor ▾   >   Vermont Taskgroup Maintenance ▾   >   Maintain Time Reporter Data

ORACLE

**Maintain Time Reporter Data**

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

Find an Existing Value

▼ Search Criteria

| | | |
|---|---|---|
| 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 ▾ | |

☐ Include History   ☐ Correct History   ☐ Case Sensitive
Limit the number of results to (up to 300): 300

Search    Clear    Basic Search 🔍 Save Search Criteria

**Enter Empl ID**

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

**Click Search**



Favorites ▾   Main Menu ▾   >   Time and Labor ▾   >   Vermont Taskgroup Maintenance ▾   >   Maintain Time Reporter Data

ORACLE

**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).

💾 Save   🔍 Return to Search   📋 Notify   🔄 Refresh   📄 Update/Display   📄 Include History   📄 Correct History

## 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:** | 01/15/2020 📅 | **Status:**   Inactive |
| **Elapsed Time Template:** | VT_COMBO 🔍 | Combination Code Reporting |
| **\*Taskgroup:** | PSNONTASK 🔍 | Non Task Taskgroup |
| **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

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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.

<u>Note</u>: 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

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





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

Enter the **Effective Date** of your Task Profile.  <u>Note</u>:  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

## ChartField Detail

Combination Code: [                    ] 🔍

**Search Options**
⦿ Combination Codes

[ Search ]

## ChartField Detail

| Account | Fund Code | Department | Program Code | Class Field | Project/Grant | Affiliate |
|---------|-----------|------------|--------------|-------------|---------------|-----------|
| 500000 | [ ] 🔍 | [ ] 🔍 | [ ] 🔍 | [ ] 🔍 | [ ] 🔍 | [ ] 🔍 |

[ 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**

## Task Profile

**Task Profile ID:**    DPS ADMIN

**Task Profile Information**        Find | View All        First ◀ 1 of 1 ▶ Last

\*Effective Date: 01/05/2020 📅        \*Status: [Active ▾]    ➕ ➖

\*Description: DPS Administrative Office        Short Description: DPS Admini

\*Task Template ID: VT_TSKPRF 🔍 Task Profile Creation Template

\*Allocation Type: [Allocation by Percentage ▾]        ☐ Send To TCD

▼ **Allocation Detail**        Personalize | Find | View All | 🗗 | 📊        First ◀ 1 of 1 ▶ Last

[ Allocation Information ] [ HR and TL Elements ] [ ChartFields ] 📇▶

| Combination Code | ChartFields | | |
|------------------|-------------|---|---|
| 000344941 🔍 | ChartFields | ➕ | ➖ |

[ 💾 Save ]        [ 📋 Add ] [ 📝 Update/Display ] [ 📄 Include History ] [ 📝 Correct 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

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

| Favorites ▼ | Main Menu ▼ | > | Set Up HRMS ▼ | > | Product Related ▼ | > | Time and Labor ▼ | > | Task Configurations ▼ | > | Task Profile |

**ORACLE**

### Task Profile

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

Find an Existing Value | Add a New Value

▼ Search Criteria

Task Profile ID: begins with ∨ [          ]
Description: begins with ∨ [          ]
☐ Include History  ☐ Correct History  ☐ Case Sensitive
Limit the number of results to (up to 300): 300

[ Search ]  [ Clear ]  Basic Search 🔍 Save Search Criteria

**Click on Add a New Value**

### Task Profile

Find an Existing Value | **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

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

## Allocation Detail

Personalize | Find | View All | ⬈ | 🔳     First ◀ 1 of 1 ▶ Last

| Allocation Information | HR and TL Elements | ChartFields | 📑▶ |
|---|---|---|---|

| Combination Code | ChartFields | | |
|---|---|---|---|
| [                    ] 🔍 | ChartFields | ➕ | ➖ |

---

### ChartField Detail

| Combination Code: | 000005321  🔍 | **Search Options** |
|---|---|---|

**Search Options**
◉ Combination Codes

[ Search ]

#### ChartField Detail

| Account | Fund Code | Department | Program Code | Class Field | Project/Grant | Affiliate |
|---|---|---|---|---|---|---|
| 500000 🔍 | 10000 🔍 | 2140012100 🔍 | [     ] 🔍 | [     ] 🔍 | 12833 🔍 | [     ] 🔍 |

[ Ok ]  [ Cancel ]

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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

Personalize | Find | View All | ⬈ | 🔳     First ◀ 1-2 of 2 ▶ Last

| Allocation Information | HR and TL Elements | ChartFields | 📑▶ |
|---|---|---|---|

| Combination Code | ChartFields | | |
|---|---|---|---|
| 000005321 🔍 | ChartFields | ➕ | ➖ |
| 000344409 🔍 | ChartFields | ➕ | ➖ |

💾 Save          📑 Add     📝 Update/Display     📝 Include History     📝 Correct History

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**:  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.  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
Find | View All   First ◀ 1 of 1 ▶ Last

| | | | | |
|---|---|---|---|---|
| *Effective Date: | 01/05/2020 📅 | *Status: | Active ⌄ | ➕ ➖ |
| *Description: | DPS TESTGROUP | Short Description: | DPS TESTGR | |
| *Task Template ID: | VT_TSKPRF 🔍 Task Profile Creation Template | ☐ Commitment Accounting | | |
| Default Task Profile: | DPSGENSUPP    DPS General Support | | | |

### Time Reporting Templates
| | |
|---|---|
| *Elapsed: | VT_TASKPRF 🔍 Task Profile Time Reporting |
| *Punch: | PSPCH_NONE 🔍 Punch Template - No Options |

Clear Task Profile Detail

### Valid Task Profiles
Personalize | Find | 🔗 | 📊   First ◀ 1 of 1 ▶ Last

| *Task Profile ID | Description | Status | Set As Default | |
|---|---|---|---|---|
| DPSGENSUPP 🔍 | DPS General Support | Active ⌄ | ☑ | ➕ ➖ |

💾 Save          📋 Add    ✏️ Update/Display    📑 Include History    📝 Correct History

Click the **Save** button.

**Creating a Taskgroup is complete**