



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

Revised: January 2020

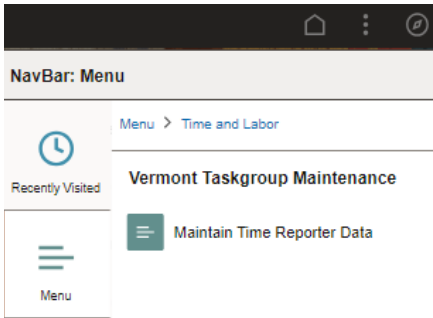
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Enrolling an Employee in an existing Taskgroup

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: Main Menu > Time and Labor > Enroll Time Reporters > Vermont Taskgroup Maintenance > Maintain Time Reporter Data

A screenshot of the 'Maintain Time Reporter Data' search interface. The page title is 'Maintain Time Reporter Data' and there are links for 'New Window' and 'Help'. Under the heading 'Find an Existing Value', there is a 'Search Criteria' section with instructions: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' The search form includes 'Recent Searches' and 'Saved Searches' dropdowns. The main search fields are: 'Empl ID' (dropdown: 'begins with'), 'Empl Record' (dropdown: '='), 'Name' (dropdown: 'begins with'), 'Last Name' (dropdown: 'begins with'), 'Second Last Name' (dropdown: 'begins with'), 'Alternate Character Name' (dropdown: 'begins with'), and 'Middle Name' (dropdown: 'begins with'). There is a 'Show fewer options' link. Below the fields are checkboxes for 'Case Sensitive', 'Include History', and 'Correct History'. At the bottom are 'Search' and 'Clear' buttons. A callout box on the right contains the text: '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".'

Maintain Time Reporter Data

Organizational Relationship: Employee ID: Empl Record: 0

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 button to add a new record (row).

Maintain Time Reporter Data

Organizational Relationship: Employee ID: Empl Record: 0

Badge Detail Group Membership

Time Reporter Data Find | View All First 1 of 2 Last

*Effective Date: 06/04/2024 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.

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

Maintain Time Reporter Data New Window | Help

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 1st letters of the name in the Name field.

Click "Search"

Maintain Time Reporter Data New Window | Help | Personalize Page

Organizational Relationship: Employee ID: Badge Detail Empl Record: 0 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 + - button to add a new record (row).

Maintain Time Reporter Data

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

Time Reporter Data Find | View All First 1 of 2 Last

*Effective Date:	06/05/2024	Status:	Inactive
Elapsed Time Template:	VT_COMBO	Combination Code Reporting	
*Taskgroup:	PSNONTASK	Non Task Taskgroup	
Task Profile ID:			
Time Reporter Group:	28AGR23		
Workgroup:	P11EX840P		

By adding a new row, you are adding a new effective dated row, which auto-populates with the current date. Effective dates should be future dated.

Save Return to Search Notify Refresh Update/Display Include History

1. Click on the Effective Date field and enter the **start date of the pay period** you want the change to take effect.
2. Enter VT_COMBO in the Elapsed Time Template field.
3. Enter PSNONTASK in the Taskgroup field.
4. **Note:** PSNONTASK must be used when Combo Codes are used on the timesheet.
5. Task Profile ID is left blank.
6. 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 HCM > Product Related > Time and Labor > Task Configurations > Task Profile

Task Profile

[New Window](#) | [Help](#)

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

Click on Add a New Value

Task Profile

[New Window](#) | [Help](#)

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 conventions 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 limited to 10 characters

Click Add

Task Profile

Task Profile ID DPS ADMIN

Task Profile Information

Search | < < 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 ||>

Allocation Percent		
<input type="text" value="0.000000"/>	<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 and future dated.

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 ||>

Allocation Percent		
<input type="text" value="0.000000"/>	<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	
Business Unit			
<input type="text" value="02140"/>		<input data-bbox="1356 367 1404 420" type="button" value="+"/>	<input data-bbox="1421 367 1469 420" type="button" value="-"/>

Save

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

▼ **Allocation Detail**

 		1-1 of 1	View All
Allocation Information	HR and TL Elements	ChartFields	
Combination Code	ChartFields		
<input type="text"/>	ChartFields	<input data-bbox="1356 823 1404 875" type="button" value="+"/>	<input data-bbox="1421 823 1469 875" type="button" value="-"/>

Save

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

Look Up Combination Code

Business Unit	<input type="text" value="02140"/>
Combination Code	<input type="text" value="begins with"/>
Description	<input type="text" value="begins with"/>
Account	<input type="text" value="begins with"/>
Department	<input type="text" value="begins with"/>
Project/Grant	<input type="text" value="begins with"/>
Product	<input type="text" value="begins with"/>
Fund Code	<input type="text" value="begins with"/>
Program Code	<input type="text" value="begins with"/>
Class Field	<input type="text" value="begins with"/>
Affiliate	<input type="text" value="begins with"/>
Operating Unit	<input type="text" value="begins with"/>
Alternate Account	<input type="text" value="begins with"/>
Budget Reference	<input type="text" value="begins with"/>
Chartfield 1	<input type="text" value="begins with"/>
Chartfield 2	<input type="text" value="begins with"/>
Chartfield 3	<input type="text" value="begins with"/>

[Basic Lookup](#)


Click OK

Task Profile


Task Profile ID DPS ADMIN

Task Profile Information

Search | < < 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"/> 	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: Main Menu > Set Up HCM > Product Related > Time and Labor > Task Configurations > Task Profile

Task Profile New Window | Help

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 Saved Searches Click on **Add a New Value**

Task Profile ID

Description

^ Show fewer options

Case Sensitive Include History

Task Profile New Window | Help

Add a New Value Find an Existing Value

*Task Profile ID

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

Consistency in naming conventions 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 limited to 10 characters

Click Add

Task Profile

Task Profile ID DPS ADMIN

Task Profile Information

*Effective Date: 06/07/2024 | *Status: Active | + | -

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

*Task Template ID: VT_TSKPRF | Task Profile Creation Template

*Allocation Type: Allocation by Percentage | Send To TCD

Allocation Detail

Allocation Information		HR and TL Elements	ChartFields	
	Allocation Percent			
	50.000000			+ -
	50.000000			+ -


Buttons: Save, Add, Update/Display, Include 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

<input type="text"/> <input type="text"/>		1-2 of 2	View All
Allocation Information		HR and TL Elements	
ChartFields			
Business Unit			
<input type="text" value="02140"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="02140"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Save

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

▼ Allocation Detail

<input type="text"/> <input type="text"/>		1-2 of 2	View All
Allocation Information		HR and TL Elements	
ChartFields			
Combination Code		ChartFields	
<input type="text" value="000344941"/>	<input type="text"/>	ChartFields	<input type="button" value="+"/>
<input type="text"/>	<input type="text"/>	ChartFields	<input type="button" value="+"/>

Save

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

Look Up Combination Code	
Business Unit	02140
Combination Code	<input type="text"/>
Description	<input type="text"/>
Account	<input type="text"/>
Department	<input type="text"/>
Project/Grant	<input type="text"/>
Product	<input type="text"/>
Fund Code	<input type="text"/>
Program Code	<input type="text"/>
Class Field	<input type="text"/>
Affiliate	<input type="text"/>
Operating Unit	<input type="text"/>
Alternate Account	<input type="text"/>
Budget Reference	<input type="text"/>
Chartfield 1	<input type="text"/>
Chartfield 2	<input type="text"/>
Chartfield 3	<input type="text"/>
<input type="button" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Cancel"/>	Basic Lookup

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			
<input type="text" value="000344941"/>	<input type="button" value="Q"/>	ChartFields		<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="000344409"/>	<input type="button" value="Q"/>	ChartFields		<input type="button" value="+"/>	<input type="button" value="-"/>

Save

Add

Update/Display

Include 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 HCM > Product Related > Time and Labor > Task Configurations > Taskgroup

Taskgroup [New Window](#) | [Help](#)

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 ✎ Saved Searches Click on **Add a New Value**

Taskgroup

Description

^ Show fewer options

Case Sensitive Include History

Taskgroup [New Window](#) | [Help](#)

Add a New Value 🔍 Find an Existing Value

*Taskgroup

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

Consistency in naming conventions is important as while your Taskgroups are for use by your department, all Taskgroups can be seen by all business offices statewide.

Note: the field is limited to 10 characters

Click Add

Taskgroup TESTGROUP

| < < 1 of 1 > > | View All

*Effective Date

*Description

*Task Template ID

*Status

Short Description

Commitment Accounting

Default Task Profile

Time Reporting Templates

*Elapsed

*Punch

Valid Task Profiles

< < 1-1 of 1 > >

*Task Profile ID	Description	Status	Default		
<input type="text"/> <input type="button" value="Q"/>		<input type="text" value="Active"/> <input type="button" value="v"/>	<input type="checkbox"/>	<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 and future dated.

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

Search | < > 1 of 1 | View All

*Effective Date: 06/07/2024

*Status: Active

*Description: DPS TESTGROUP

Short Description: DPS TESTGR

*Task Template ID: VT_TSKPRF Task Profile Creation Template

Commitment Accounting

Default Task Profile

Time Reporting Templates

*Elapsed: VT_TASKPRF Task Profile Time Reporting

*Punch: PSPCH_NONE Punch Template - No Options

Valid Task Profiles

< > 1-1 of 1 | > >|

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

Click the **Save** button.

Creating a Taskgroup is complete