



Miami-Dade County

Create New Task Profile - Job Aid

DESCRIPTION

This job aid is for DPR, Central HR, and users with Task Profile Administrator role in INFORMS.

Tasks and Task Profile IDs are used within Time and Labor to further define and track areas of work. The purpose of this job aid is to help end users perform the steps needed to create a new task profile to charge labor to a Project and Activity.

CREATE NEW TASK PROFILE

Step	Action
1.	<ul style="list-style-type: none">• Log into INFORMS.• Navigate to Setup HCM > Common Definitions > ChartField Configuration > Combination Code Table.<ul style="list-style-type: none">• Select the Add a New Value tab.• Enter the Set ID to "MDC".• Enter in Process Group "AP_AF".• Enter GL Combination Code, it should start with your two-character Business Unit acronym followed by '_' and then a meaningful description.• Click Add. <div data-bbox="391 846 1349 1646"><h3>Combination Code Table</h3><p>Find an Existing Value Add a New Value</p><p>Set ID <input type="text" value="MDC"/> <input type="button" value="Q"/></p><p>Process Group <input type="text" value="AP_AF"/></p><p>GL Combination Code <input type="text" value="JOB AID"/></p><p>Add</p></div>

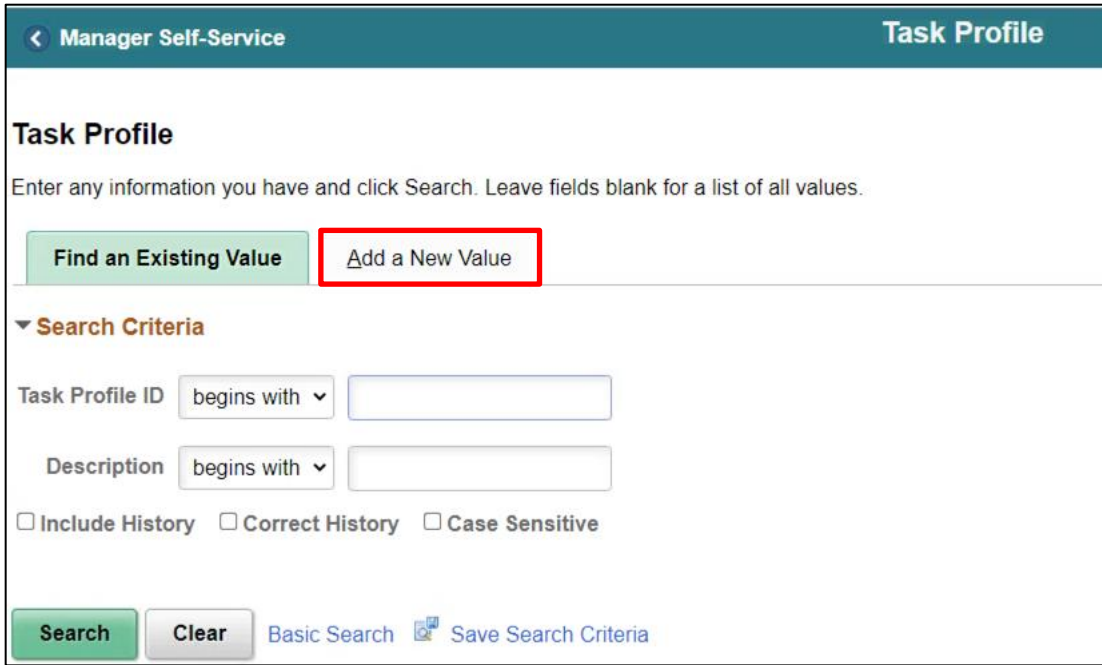
- In the **Combination Code Detail** section, complete the following fields:
 - **Effective Date:** Date which the combination code becomes effective to use.
 - **Status:** Active.
 - **Description** and **Short Desc:** According to your business decisions.
- In the **ChartField Detail** section, complete (at a minimum) the following fields:
 - **Fund Code,**
 - **Department,**
 - **Account,**
 - **Grant,**
 - **PC Business Unit,**
 - **Project, and**
 - **Activity.**

2.

3.

Navigate to **Setup HCM > Product Related > Time and Labor > Task Configuration > Task Profile.**


4. Click **Add a New Value**.



The screenshot shows the 'Task Profile' search interface. At the top, there is a navigation bar with a back arrow and 'Manager Self-Service' on the left, and 'Task Profile' on the right. Below this is a section titled 'Task Profile' with the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two buttons: 'Find an Existing Value' (green) and 'Add a New Value' (white with a red border). Below these is a 'Search Criteria' section with a dropdown arrow. It contains two search criteria: 'Task Profile ID' with a 'begins with' dropdown and an empty text box, and 'Description' with a 'begins with' dropdown and an empty text box. There are three checkboxes: 'Include History', 'Correct History', and 'Case Sensitive'. At the bottom, there are buttons for 'Search' (green), 'Clear' (grey), and links for 'Basic Search' and 'Save Search Criteria'.

5.

- Enter the **Task Profile ID** (10 AlphaNumeric) beginning with two-character Business Unit acronym.
- Click **Add**.



The screenshot shows a 'Task Profile' form. At the top, there is a navigation bar with 'Find an Existing Value' (grey) and 'Add a New Value' (green) buttons. Below this is a section titled 'Task Profile' with a text input field for 'Task Profile ID' containing the value 'MDC_123'. Below the input field is a green 'Add' button. At the bottom, there are links for 'Find an Existing Value' and 'Add a New Value'. The 'Add' button and the 'Task Profile ID' input field are highlighted with a red box.

6.

Enter the following fields under **Task Profile Information**:

- **Effective Date:** When the Task Profile is active.
- **Description:** Task description.
- **Task Template ID:** Choose Template. This controls what ChartFields and Combo Code are active in the Task Profile. Templates to choose from are:
 - a. PSNONCATASK: Used for Position Budget and is automatically assigned as default.
 - b. MDADTMPLT: Used for Aviation.
 - c. WASD TMPLT: Used by WASD.
 - d. MDCTEMP: Used for all other Miami Dade County Business Units when creating task profiles to charge a Project and Activity value.
- On **Allocation Information** tab enter 100 (defaulted to 0). Allocation reflects the percentage of time billed to this task.
- Verify **Status** as Active.

Task Profile
Task Profile ID: JOBAID

Task Profile Information

*Effective Date: 05/05/2022
*Description: JOBAID
*Task Template ID: MDCTEMP
*Allocation Type: Allocation by Percentage

*Status: Active
Short Description: JOBAID
 Send To TCD

Allocation Detail

Allocation Information | HR and TL Elements | ChartFields

Allocation Percent: 100.000000

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

7.

- Select **HR and TL Elements** tab.
- Select a **Business Unit**.

The screenshot shows the 'Task Profile' form for 'JOBBAID'. The 'Task Profile Information' section includes fields for Effective Date (05/05/2022), Status (Active), Description (JOBBAID), Short Description (JOBBAID), Task Template ID (MDCTEMP), and Allocation Type (Allocation by Percentage). The 'Allocation Detail' section has three tabs: 'Allocation Information', 'HR and TL Elements' (highlighted with a red box), and 'ChartFields'. Below the tabs is a 'Business Unit' search field, also highlighted with a red box. At the bottom are buttons for 'Save', 'Add', 'Update/Display', 'Include History', and 'Correct History'.

8.

- Select **ChartFields** tab.
- Click **ChartFields** link.

This screenshot shows the same 'Task Profile' form, but the 'ChartFields' tab is now selected and highlighted with a red box. The 'Business Unit' field is no longer visible. The 'ChartFields' link in the 'Allocation Detail' section is also highlighted with a red box. The 'Save' and other action buttons remain at the bottom.

9.	<ul style="list-style-type: none"> Enter the Combination Code. Click OK. Click Save. <div style="text-align: center; margin-top: 20px;"> </div>
10.	<p>Navigate to Set Up HCM > Product Related > Time and Labor > Task Configuration > Taskgroup.</p>
11.	<ul style="list-style-type: none"> Enter Effective Date. Verify Status is Active. Enter Description. Short Description should default. Enter Task Template ID: MDCTEMP. Enter Elapsed Template: MDCELAPSED. Enter Punch Template: MDCPUNCH. Select a Task Profile ID: You must have a least one default task profile ID. Click Save. <div style="text-align: center; margin-top: 20px;"> </div>

12.	<ul style="list-style-type: none">• Enter Taskgroup name.• Click Save. <div data-bbox="565 340 1175 856"><h3>Taskgroup</h3><p>Find an Existing Value Add a New Value</p><p>Taskgroup JOBAID</p><p>Add</p></div>
13.	<ul style="list-style-type: none">• Enter the Taskgroup name to associate it with a Task Profile ID. If the task profile is in the wrong Taskgroup, exception on the timecard will be generated and the time will not be approved.• Click Search. <div data-bbox="467 1062 1273 1591"><h3>Taskgroup</h3><p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p><p>Find an Existing Value Add a New Value</p><p>▼ Search Criteria</p><p>Taskgroup begins with </p><p>Description begins with </p><p><input type="checkbox"/> Include History <input type="checkbox"/> Correct History <input type="checkbox"/> Case Sensitive</p><p>Search Clear Basic Search Save Search Criteria</p></div>

14.

Click + button at the bottom of the page to add a new Task Profile.

The screenshot shows the 'Taskgroup' application window. At the bottom, there is a table titled 'Valid Task Profiles' with the following data:

*Task Profile ID	Description	Status	Default		
MDCNONTASK	MDC NON TASK PROFILE	Active	<input checked="" type="checkbox"/>	+	-

15.

- Click **Search**.
- Select the **Task Profile ID**.

The screenshot shows the 'Look Up Task Profile ID' dialog box. The 'Search' button is highlighted with a red box. Below it, the search results are displayed in a table:

Task Profile ID	Description
MDCNONTASK	MDC NON TASK PROFILE
PSNONTASK	Non Task Profile

16.

Valid Task Profiles: Use the grid to attach one or more task profiles to the taskgroup.

- **Task Profile ID:** Select the default task profile(s) you want to associate with this taskgroup. The prompt table lists only those task profiles created with the template you selected in the Task Template ID field.
- **Description:** The description of the taskgroup you selected in the Task Profile ID field automatically displays here.
- **Status:** When you add a task profile ID to the grid, the status automatically defaults to “Active”. The status changes to “Inactive” if you change the task template.
- **Set As Default:** You must select one task profile as the default for the taskgroup. This is the profile the system will use for any taskgroup members who don't have their own individual task profile defined on the Create Time Reporter Data page. Select this check box if you want this task profile to be the default profile.

Taskgroup
Taskgroup 09674025

Taskgroup Information

*Effective Date: 10/04/2021 *Status: Active

*Description: 740-PRESTON WATER LAB Short Description: 09674025

*Task Template ID: WASDTMPLT WASD TEMPLATE Commitment Accounting

Default Task Profile: 825492 74021_LabW Treat & P(WT),16003

Time Reporting Templates

*Elapsed: WASDTMPLT WASD Default Elapsed Template

*Punch: MDCPUNCH Miami Dade Punch Tmpl

Clear Task Profile Detail

Valid Task Profiles

*Task Profile ID	Description	Status	Default		
825492	74021_LabW Treat & P(WT),16003	Active	<input checked="" type="checkbox"/>	+	-
827136	72012_Repair & Maint(WD),13007	Active	<input type="checkbox"/>	+	-
837320	74021_XJK0251 MISCELLANEOUS	Active	<input type="checkbox"/>	+	-
837811	72012_Rep/Maint - Ma(WD),13007	Active	<input type="checkbox"/>	+	-
849596	74021_X000464,PROJECT MANAGEME	Active	<input type="checkbox"/>	+	-

17.

Click **Save**.