**STEP 1**

**Do not proceed with completing this task if your agency has not made the decision on whether or not to use Project Costing.   If you have decided to use Project Costing, your agency must complete tasks PC001 (Project Setup) and PC002 (Source Type, Category, and SubCategory) before beginning the attached task.**

**TL004: COMBO CODE/TASK PROFILE CREATION**

**In order to prepare for the system test phase, all Time and Leave agencies are asked to review the following task and submit the spreadsheet noted in the instructions below no later than January 25, 2012.** The submitted spreadsheet will be used to populate the appropriate system tables for testing. Agencies will be asked to validate/update the spreadsheet prior to the spreadsheet being used to load the tables for go-live.

**PART #1: COMBO CODE CREATION – Due Jan. 25, 2012**

**If you are an agency who is not adding project costing and does not need to add any additional combo codes, this task can be ignored.**

This task is required for agencies that are adding Project Costing. If you are not intending to use the Project Costing module but have interest in using task profiles, please contact Heather DeBusk to get more information.

The excel spreadsheet upload process will continue to be used to update the Combination Code Table. The required spreadsheet layout is attached. Please note that the spreadsheet layout has changed and will be the new template used after the upgrade has been completed.

**The following fields are all part of the Combo Code. Please take notice that the project costing chartfields are now considered part of the combo code. (NOTE: The task profile section of the attached spreadsheet is only required for those agencies that want to use task profiles):**

* Combo Code\*
* Effective Date\*
* Status\*
* Description\*
* Short Description
* DeptID\_CF (Department)\*
* Fund\*
* Budget Unit\*
* Program Code\*
* Account\*
* PC Business Unit (PCBU)\*\*
* Project ID\*\*
* Activity ID\*\*
* Source Type
* Category
* Subcategory
* Service Location
* Agency Use
* ChartField 2

\***Required Fields**

**\*\*Required Fields if you are using Project Costing**

**Please note that all individual chart field values MUST exist in SMART before they can be used in the ComboCode in SHARP. Any time one of the chartfields in the list above changes, a new, unique, combo code must be established.**

**Recommended Naming Convention:**

The Office of General Services **requires** that the first 3 digits of your ComboCode be your 3 digit agency number. Going forward, that is the only naming convention requirement other than the name for each of your combo codes **must** be unique.

**PART #2: TASK PROFILE CREATION – Due Jan. 25, 2012**

The following are instructions on how to populate the Task Profile portion of the combination code spreadsheet. (Columns S through Y)

The task profiles are loaded in the same spreadsheet as the combination codes. The first portion of the spreadsheet covers the Combo Code. The second portion covers the task profiles that are related to the Combo Codes. **NOTE: This task does not pertain to the Interface agencies unless the Interface agencies choose to use Task Profiles.**

Things to keep in mind as you fill out the Combo Code and Task Profiles spreadsheet:

1. The Combo Code will be the funding source for the corresponding task profile on the same line.
2. If all of your employees record task profiles on the timesheet, you still need to create a default funding source on the Department Budget Table for each Department. The default funding source will be used for any expenses that are recorded in Payroll directly without going through Time and Labor. There will be a task released giving more details on the department budget table.
3. For the employees that do not record task profiles on the timesheet, the system will use the funding source on the department budget table.
4. These profiles will also be used on TL004, Taskgroup Task, where you will group your profiles into like groups.

**Required fields for the Task Profile portion are:**

* **Task Profile ID (Task ProfID)**: The Office of General Services **requires** that the first 3 digits of your Task Profile be your 3 digit agency number. Please keep in mind that this is what the employees will see on their timesheets. Make the Task Profile IDs as descriptive and meaningful as possible.
* **Effective Date (Eff Date):** This effective date must be equal or greater than the effective date for the Combo Code (yes, it can be different from the Combo Code effective date)
* **Status:** During the initial upload the Status should always be ‘A’ for Active
* **Description**
* **Allocation Type:** We will be using two allocation types: Percentage “C” and Equally “E”
* **Percent:** (only required if Allocation Type is C) For the percentage allocation type “C”, all the percents for a specific task profile must add up to 1. If the Allocation Type is to be allocated Equally “E” among all tasks, leave the Percent column blank.

**STEPS FOR SUBMISSION OF COMBO CODE/TASK PROFILE FILE:**

1. File must be in Excel format with all columns set to TEXT format and the file saved in .xls format
2. File Name is XXX.TL004 where XXX is the three digit agency code
3. Please contact Heather DeBusk at Heather.DeBusk@da.ks.gov or via phone at 785.296.2434 for questions related to the Combo Code/Task Profile file.
4. Completed files must be submitted via e-mail no later than January 25, 2012 to Heather.DeBusk@da.ks.gov .