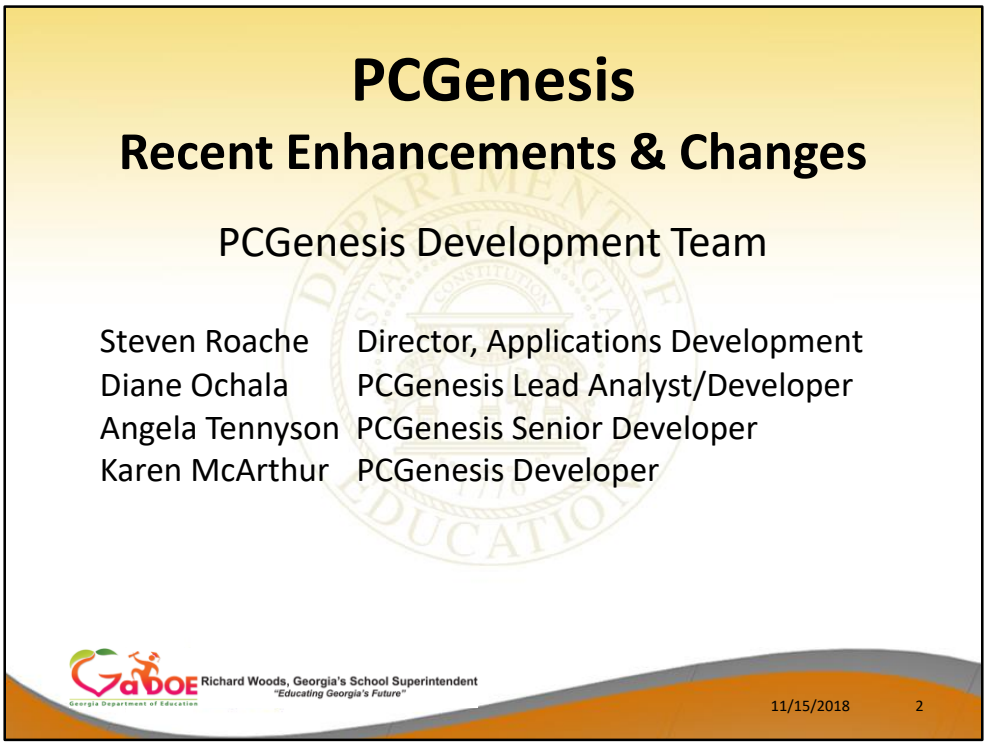
PCGenesis

Recent Enhancements & Changes

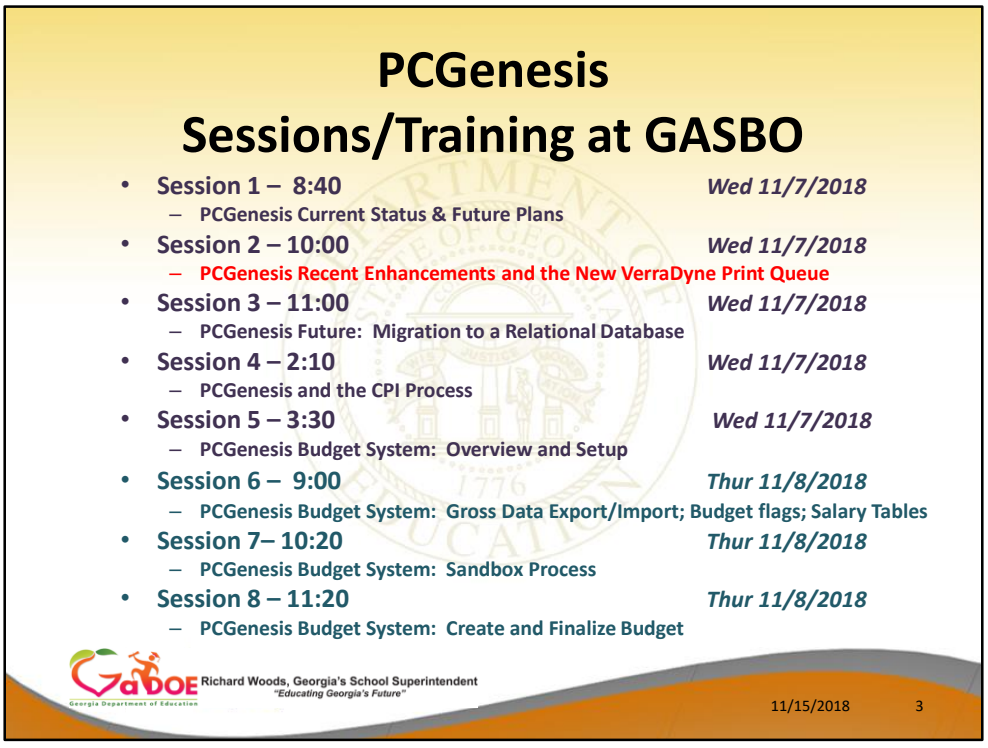
GASBO

Augusta, GA

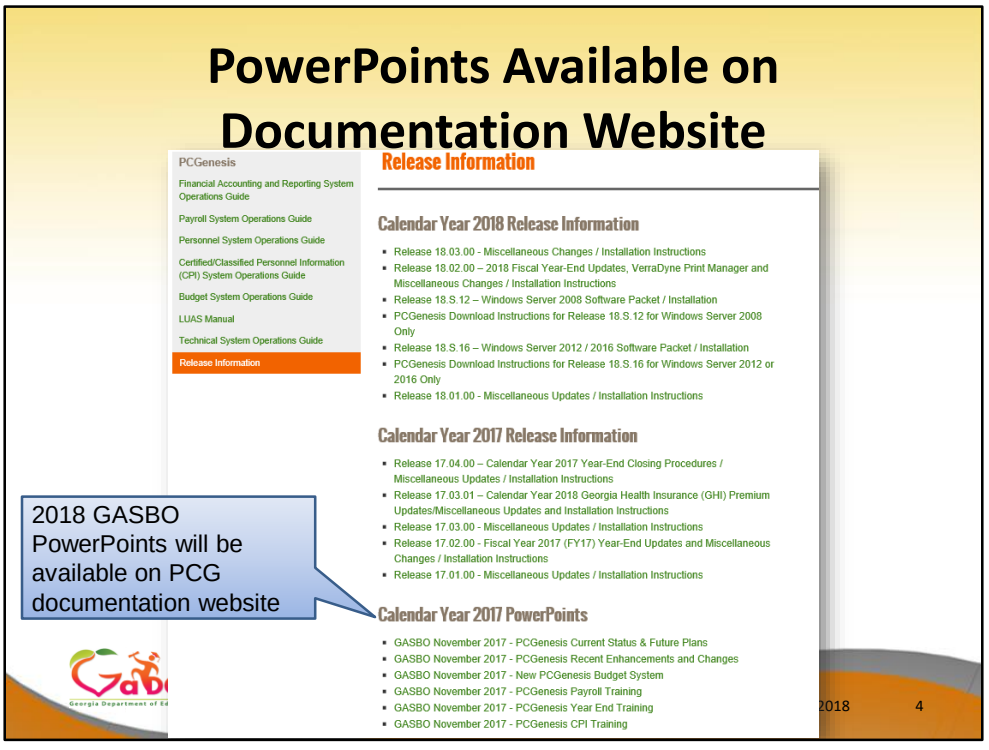
November 7, 2018



- Good morning & welcome to the PCGenesis **Recent Enhancements & Changes** Session. Steve, Angela & I thank you for coming today. I would also like to introduce our manager, Steven Roache, who is attending GASBO this year as well.
- Please feel free to make comments or ask questions during the presentation. We need your input to help us focus on your needs. So all of you, please join in the discussion.



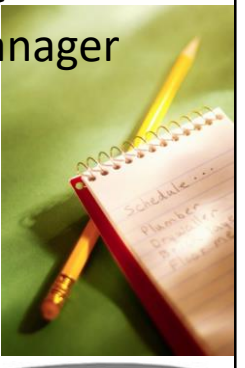
- We have a full schedule here at GASBO this year. We have 4 presenters, including myself
- We have our two standard PCG sessions this morning.
- Angela Tennyson will be the presenter for Session 3 and Katie Green will be the presenter for Session 4.
- We also have our good friend Gary Jenkins of Jasper County offering four sessions related to the PCGenesis Budget System.
- We are looking forward to all of these sessions!



All of today's PowerPoint presentations will be available on our documentation website under 'Release Information'. We will publish the PowerPoint along with the presenter's notes for future viewing.

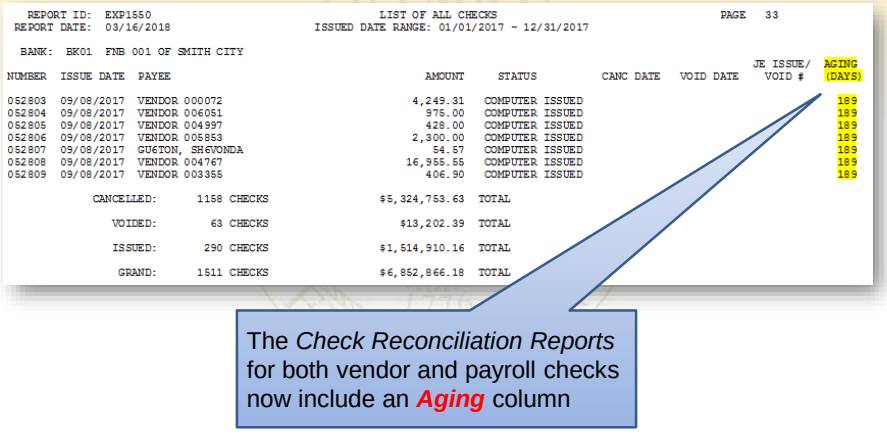
Agenda

- **Recent FAR Enhancements**
- Recent Payroll Enhancements
- Upgrade of PCGenesis Print Queue
- Demo of the VerraDyne Queue Manager



- Although the **VerraDyne Print Queue** upgrade was our major enhancement this year, the PCG development team has also had time for some big financial and payroll enhancements.
- Many of these enhancements came about because of the Comments we receive here at GASBO!

Check Reconciliation Reports



REPORT ID: EXP1550 — LIST OF ALL CHECKS — PAGE 33
REPORT DATE: 03/16/2018 — ISSUED DATE RANGE: 01/01/2017 - 12/31/2017

BANK: BK01 FNB 001 OF SMITH CITY

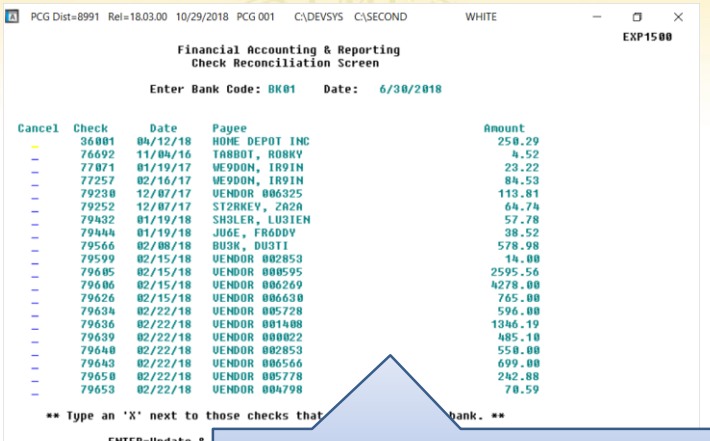
NUMBER	ISSUE DATE	PAYEE	AMOUNT	STATUS	CANC DATE	VOID DATE	JE ISSUE/ VOID #	AGING (DAYS)
052803	09/08/2017	VENDOR 000072	4,249.31	COMPUTER ISSUED				189
052804	09/08/2017	VENDOR 006051	975.00	COMPUTER ISSUED				189
052805	09/08/2017	VENDOR 004997	428.00	COMPUTER ISSUED				189
052806	09/08/2017	VENDOR 005853	2,300.00	COMPUTER ISSUED				189
052807	09/08/2017	GU6TON, SH6VONDA	54.57	COMPUTER ISSUED				189
052808	09/08/2017	VENDOR 004767	16,955.55	COMPUTER ISSUED				189
052809	09/08/2017	VENDOR 003355	406.90	COMPUTER ISSUED				189

CANCELLED:	1158 CHECKS	$5,324,753.63	TOTAL
VOIDED:	63 CHECKS	$13,202.39	TOTAL
ISSUED:	290 CHECKS	$1,514,910.16	TOTAL
GRAND:	1511 CHECKS	$6,852,866.18	TOTAL

The *Check Reconciliation Reports* for both vendor and payroll checks now include an ***Aging*** column

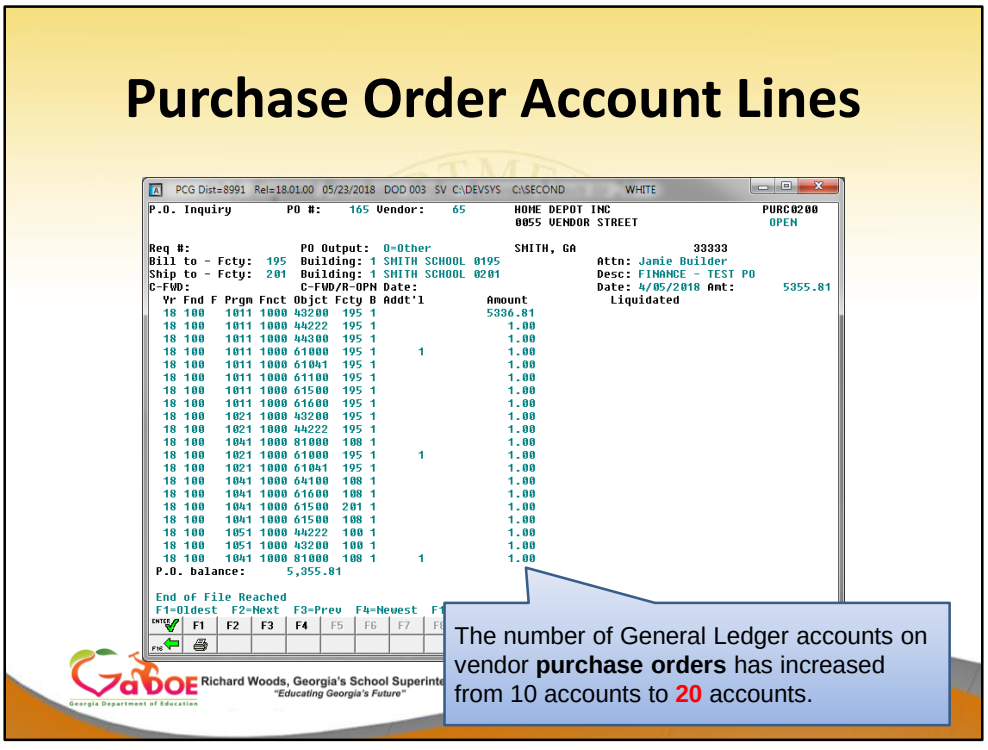
- The *Check Reconciliation Listing* for '**ALL**' or '**ISS**' (Issued) checks will now print an *Aging* column on the report to reflect how many days a payroll or vendor check has been outstanding.
- This feature facilitates tracking outstanding payroll/vendor checks.

Check and Wire Transfer Reconciliation

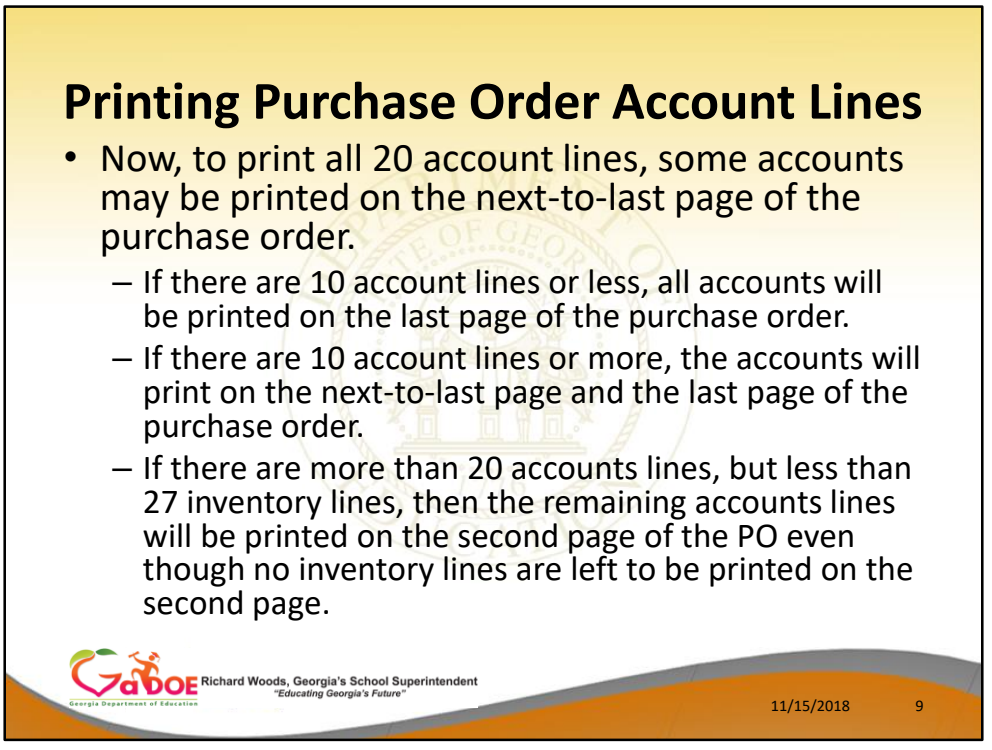


- The *Check Reconciliation* (F1, F4, F11, F1) and the *Wire Transfer Reconciliation* (F1, F4, F12, F1) procedures have been enhanced so that 20 items are displayed on the screen at a time.
- Before, only 12 items were displayed on a page.
- This makes selecting items for cancellation easier because it is not necessary to browse through so many pages of data.
- The vendor check and wire transfer reconciliation procedures allow the user to compare the vendor checks and wire transfers to the bank statement, and cancel the bank-processed items from PCGenesis.

Purchase Order Account Lines



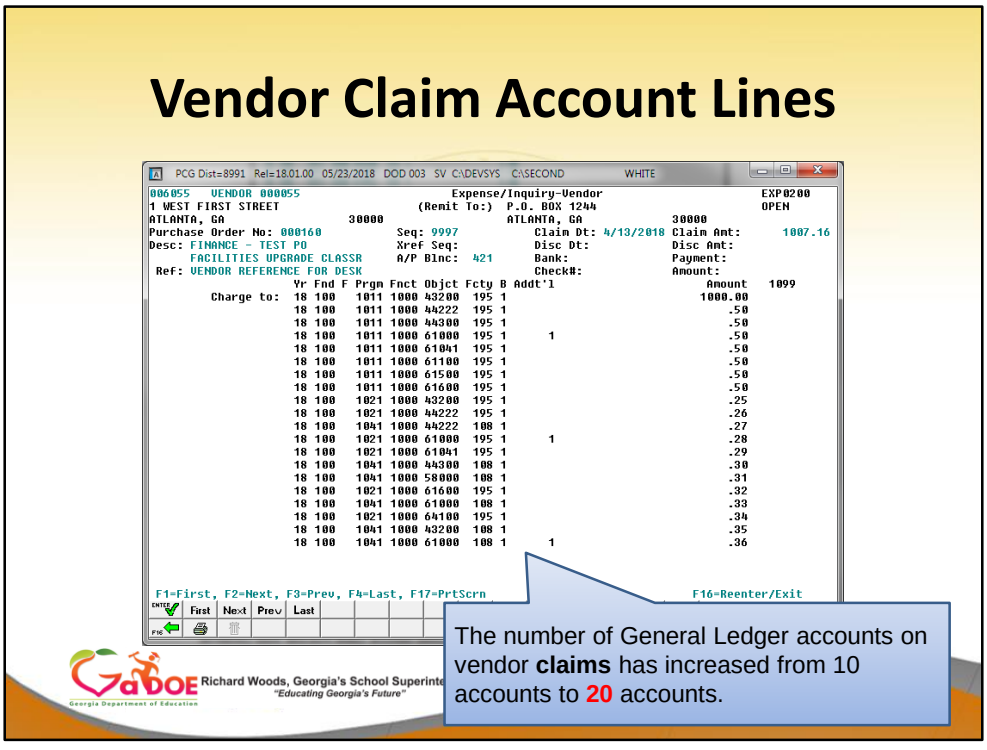
- The number of General Ledger accounts on vendor purchase orders has been increased from 10 accounts to 20 accounts.
- This facilitates entering vendor purchase orders by allowing more general ledger data to be entered per purchase order.



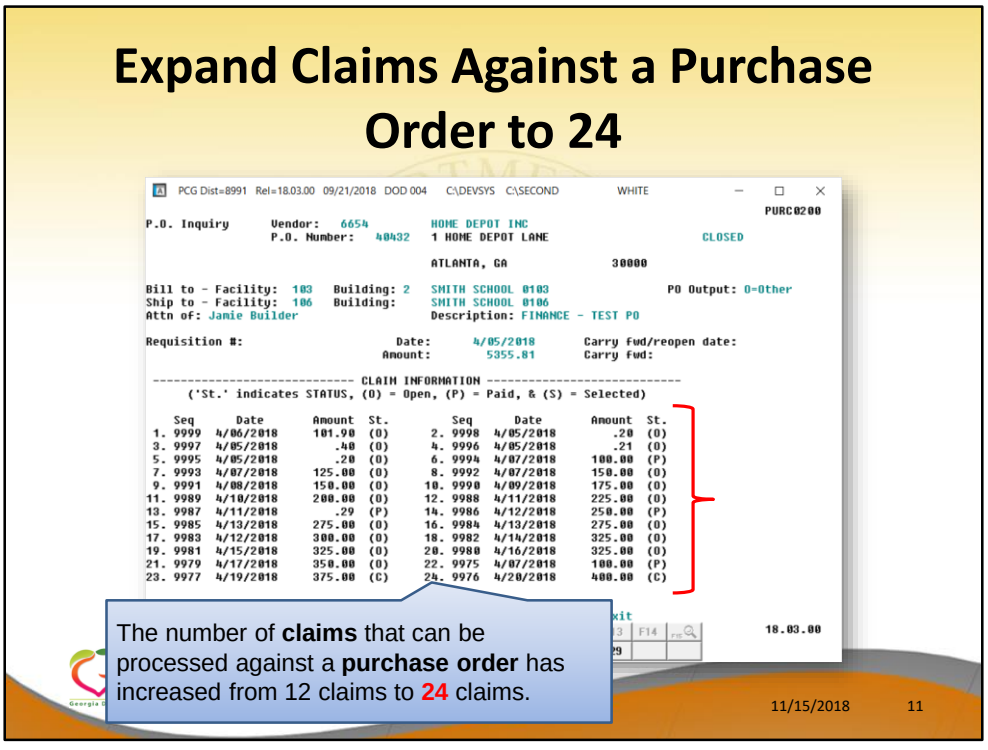
Today, PCGenesis always prints the general ledger account lines on the last page of the purchase order. Now, to include all 20 account lines, some accounts may be printed on the next-to-last page of the purchase order. The way the purchase order prints depends on the number of inventory lines and the number of account lines as detailed below:

- If there are 10 account lines or less, all accounts will be printed on the last page of the purchase order.
- If there are 10 account lines or more, the accounts will print on the next-to-last page and the last page of the purchase order.
- If there are more than 20 accounts lines, but less than 27 inventory lines, then the remaining accounts lines will be printed on the second page of the purchase order even though no inventory lines are left to be printed on the second page.

Vendor Claim Account Lines

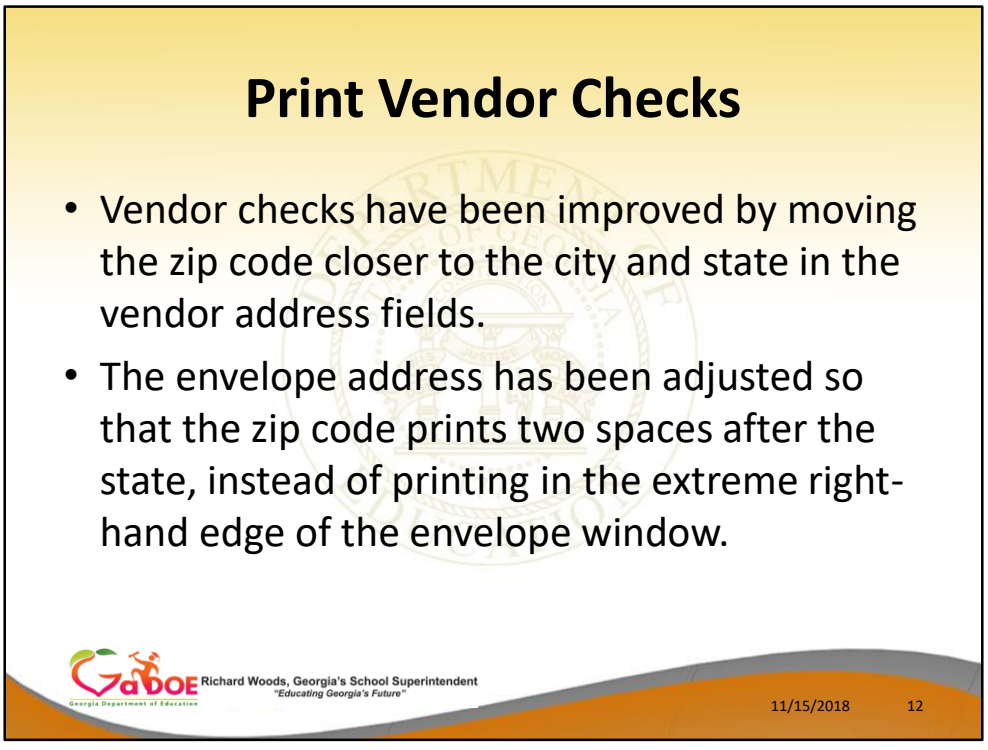


- The number of General Ledger accounts on vendor claims has been increased from 10 accounts to 20 accounts.
- This facilitates entering vendor claims by allowing more general ledger data to be entered per claim.



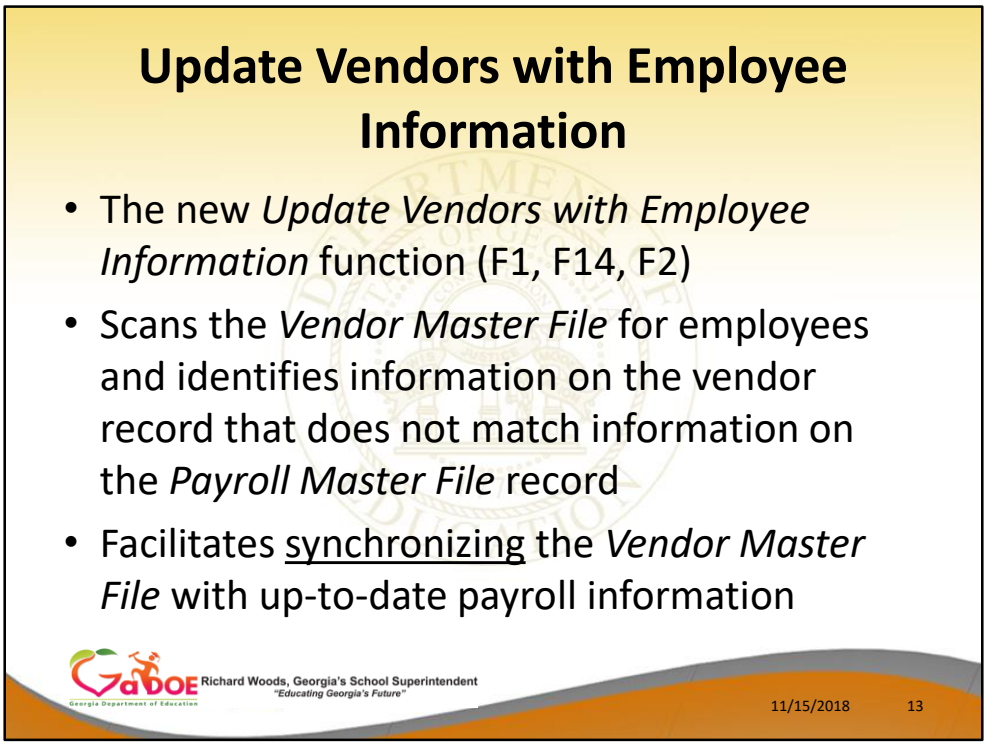
Expand Claims Against a Purchase Order to 24

- The number of claims that can be processed against a purchase order has been increased from 12 claims to 24 claims.
- This enhancement reduces the number of purchase orders that need to be entered when more than 12 claims must be processed against the same purchase order.
- This saves data entry time and effort and improves reliability by not requiring duplicate entry of purchase order information.
- This was a request we have received numerous times at GASBO!



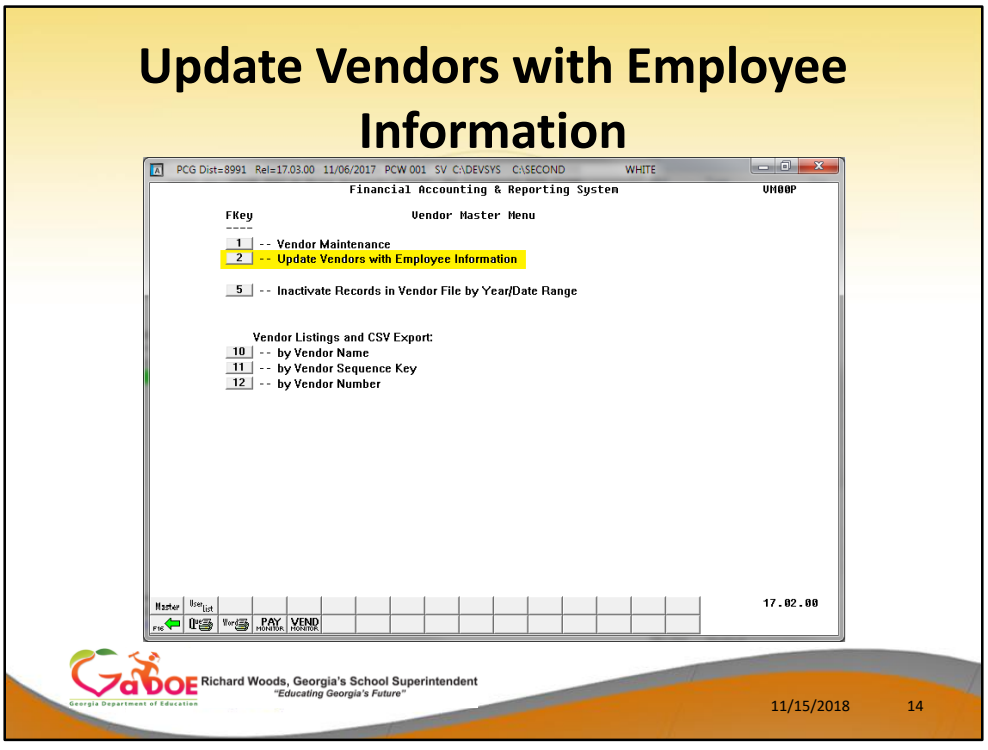
A3.3. Print Vendor Checks

- The *Print Vendor Checks* ((F1, F4, F5, F4) option has been improved by moving the zip code closer to the city and state in the vendor address fields on the vendor check.
- The envelope address has been adjusted so that the zip code prints two spaces after the state, instead of printing in the extreme right-hand edge of the envelope window.



Update Vendors with Employee Information

- A new function *Update Vendors with Employee Information* (F1, F14, F2) has been added to the *Vendor Master Menu*
- This program scans the *Vendor Master File* for employees and identifies information on the vendor record that does not match information on the *Payroll Master File* record
- The purpose of this program is to synchronize the *Vendor Master File* with up-to-date payroll information



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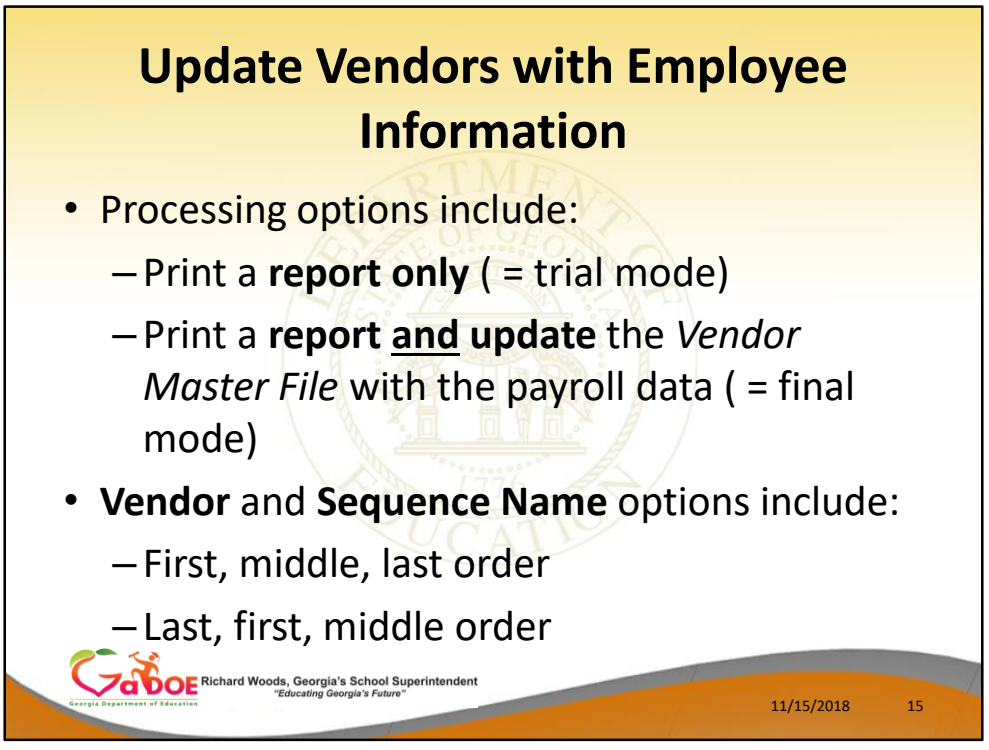


Update Vendors with Employee Information

Processing options include:

- Print a report only
- Print a report and update the *Vendor Master File* with the payroll data

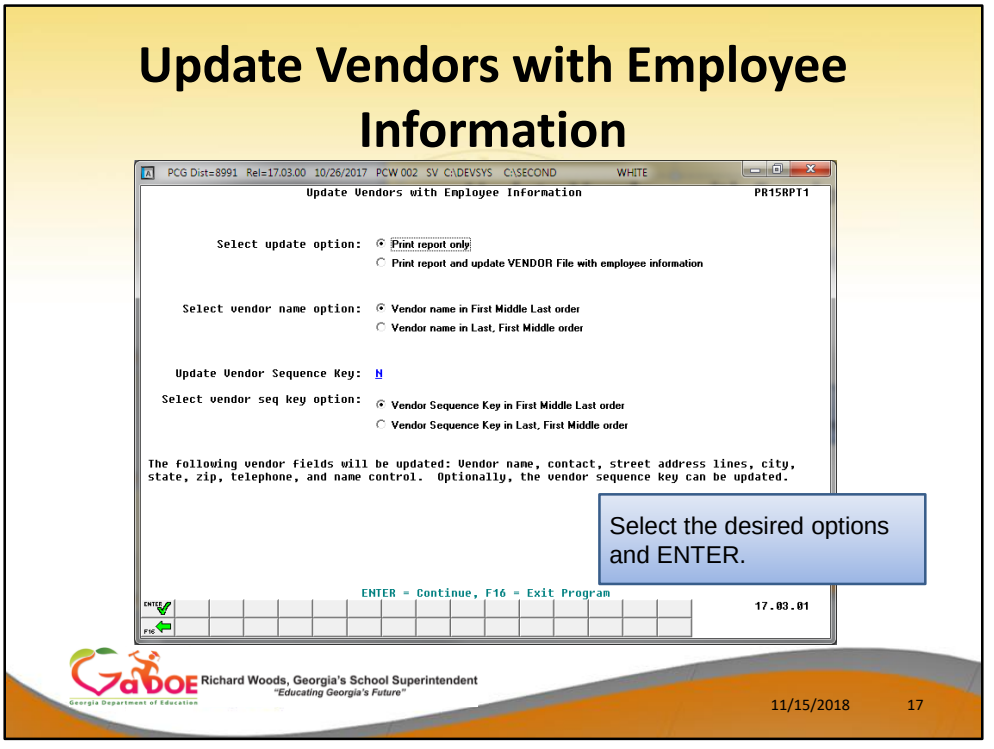
The **Vendor Name** and **Sequence Name** can be updated in

- First, middle, last order
- Last, first, middle order

Update Vendors with Employee Information

The following fields will be updated on the *Vendor Master File* :

- Vendor name – The vendor name field will be updated !
- Contact name
- Street address lines, city, state, and zip
- Telephone number
- Name control field
- Vendor sequence key (optional)



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The **Vendor Name** and **Sequence Name** can be updated in

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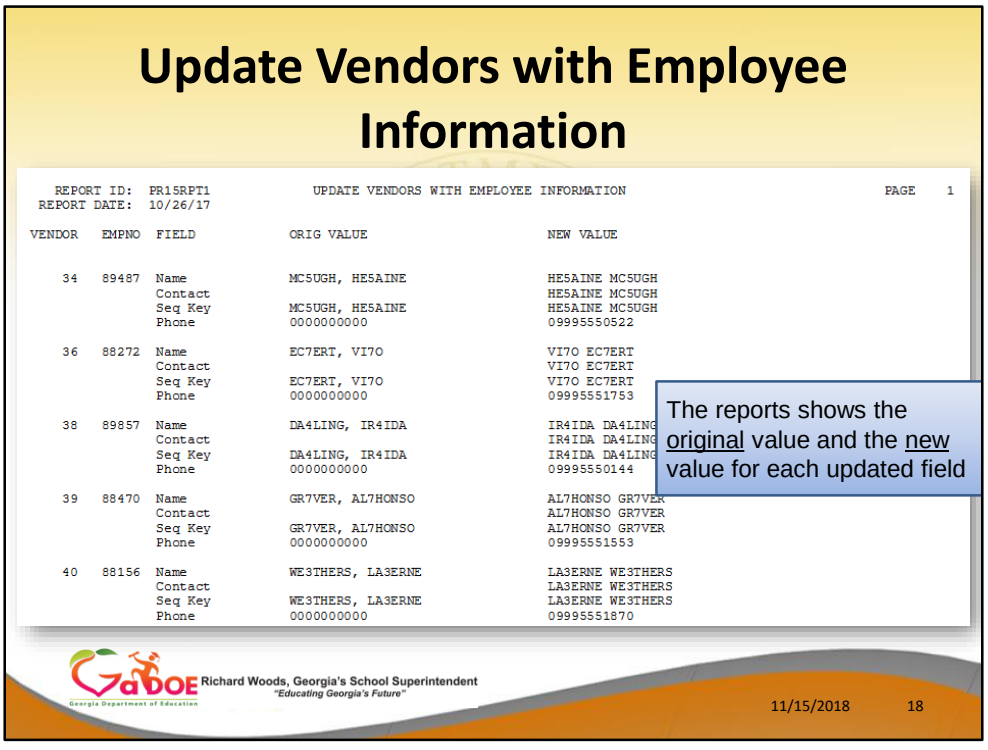
Updating the **Vendor Sequence Key** is optional



Update Vendors with Employee Information

- The reports shows the original value and the new value for each updated field

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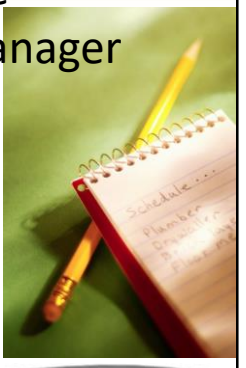
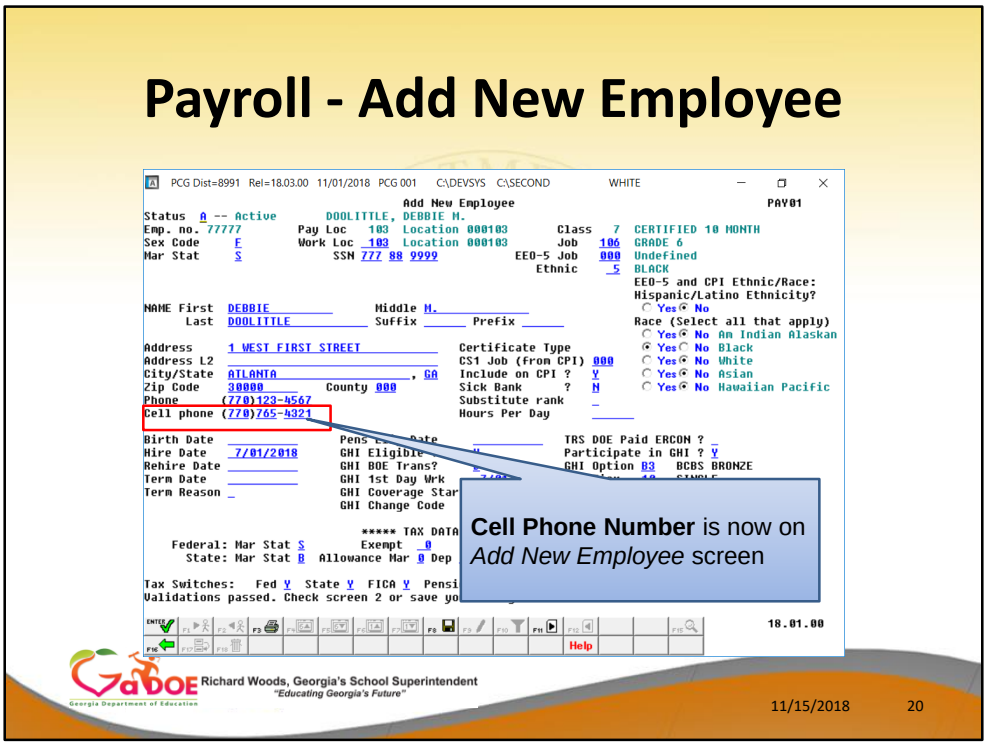
- **Recent Payroll Enhancements**
- Upgrade of PCGenesis Print Queue
- Demo of the VerraDyne Queue Manager

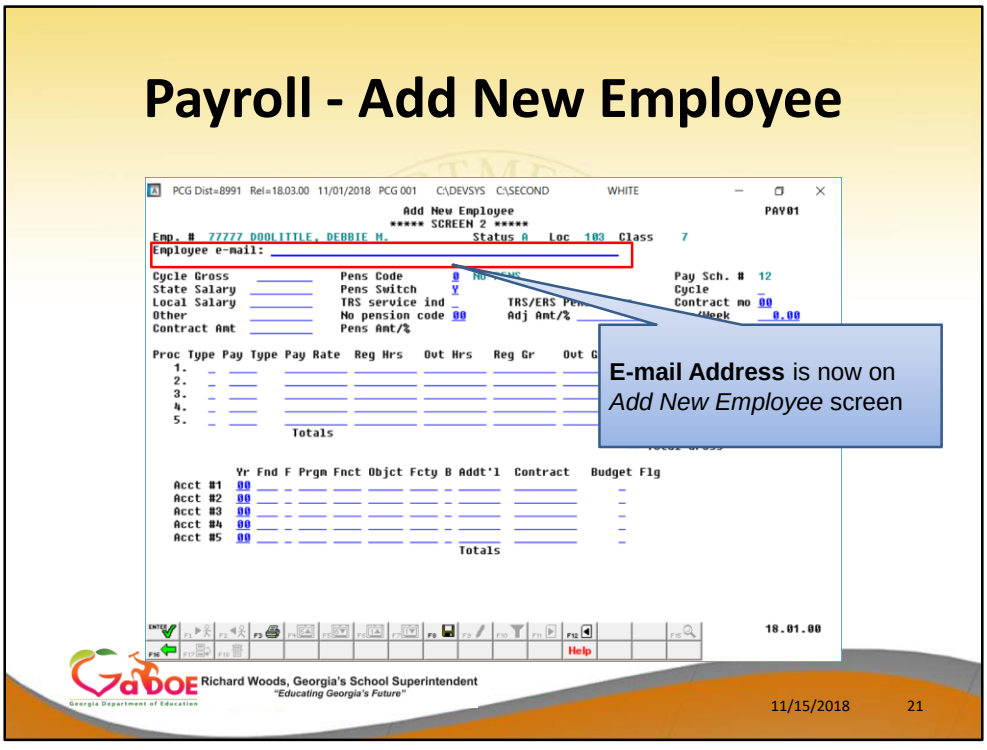




A2.4. Add New Employee

- Enhancements are being made to the *Add New Employee* (F2, F2, F1) screen to facilitate SHBP AUF File processing.
- Two new fields have been added to the *Add New Employee* screen, the **cell phone number** and the **e-mail address**. The first screen shows the **cell phone number**.
- Having the employee e-mail address field available on the *Add New Employee* screen will allow the **NEMP** (new employee) change transaction to be created with the correct e-mail address for the employee on the SHBP AUF File.
- This will help to get information on the AUF file for SHBP as a **NEMP** (new employee) transaction and not as a **MISC** (miscellaneous) transaction.
- The payroll administrator will no longer be required to go to the *Update/Display Emergency Data* screen (F3, F1, F5) to enter the employee's e-mail address after adding a new

employee.



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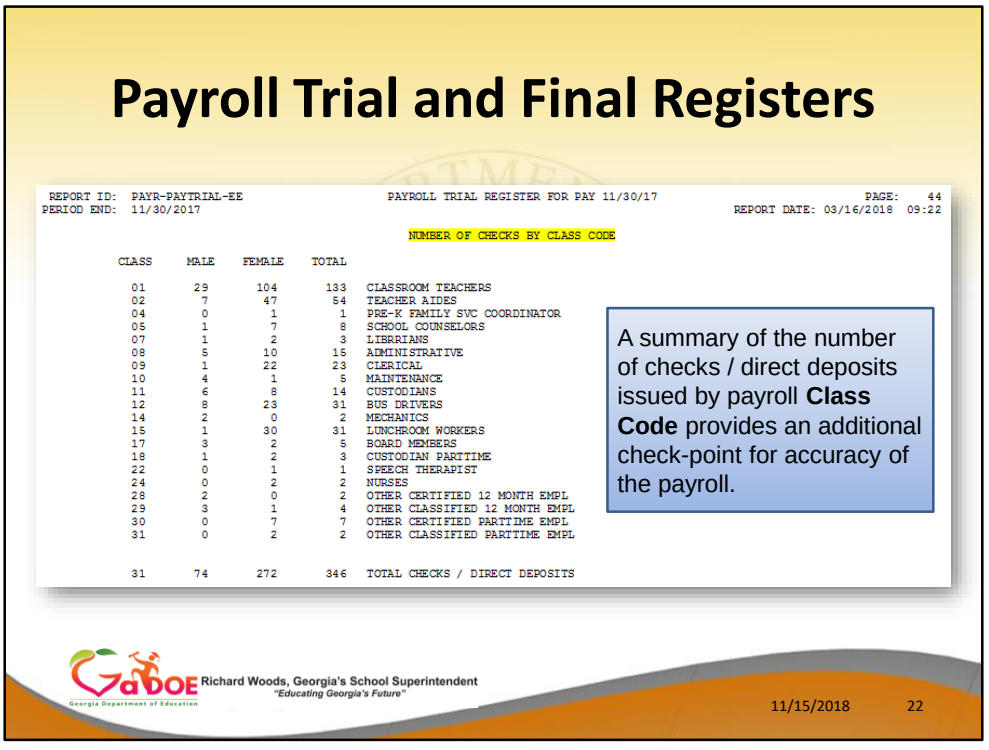

A2.10. Payroll Trial Register and Final Register

- The *Payroll Trial Register* (F2, F3, F3) and the *Payroll Final Register* (F2, F3, F7) reports have been enhanced.
- The reports now include a summary of the number of checks / direct deposits issued by payroll **Class Code** at the end of the reports.
- This feature provides another check-point for ensuring the accuracy of the payroll by allowing the payroll administrator to quickly identify the total number of checks / direct deposits for each class code.

Agenda

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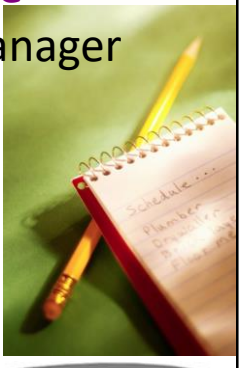
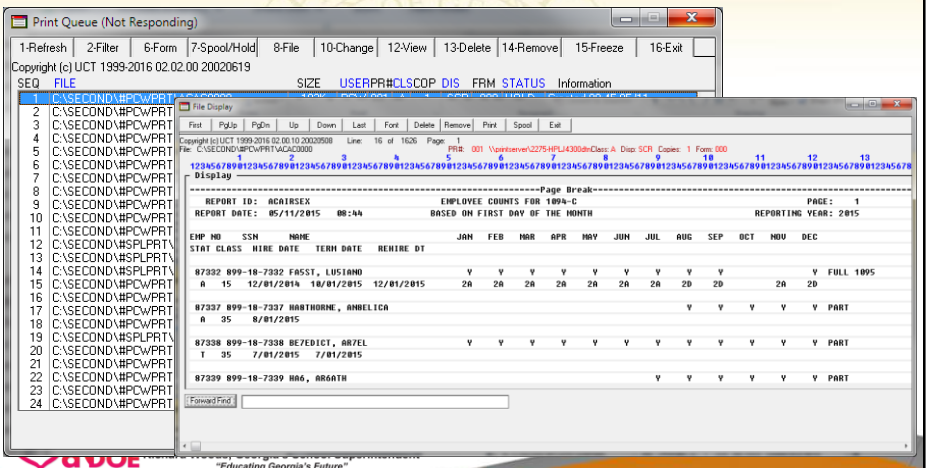
- Recent Payroll Enhancements
- **Upgrade of PCGenesis Print Queue**
- Demo of the VerraDyne Queue Manager



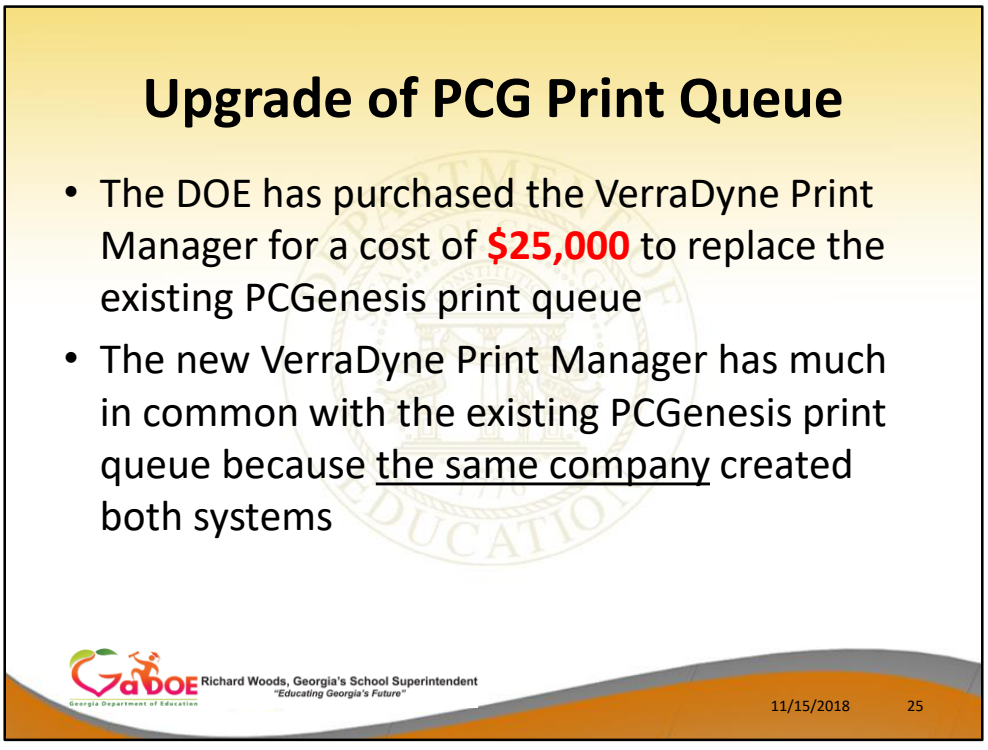
The major enhancement this year was the new **VerraDyne Print Queue Manager**.

Upgrade of PCG Print Queue

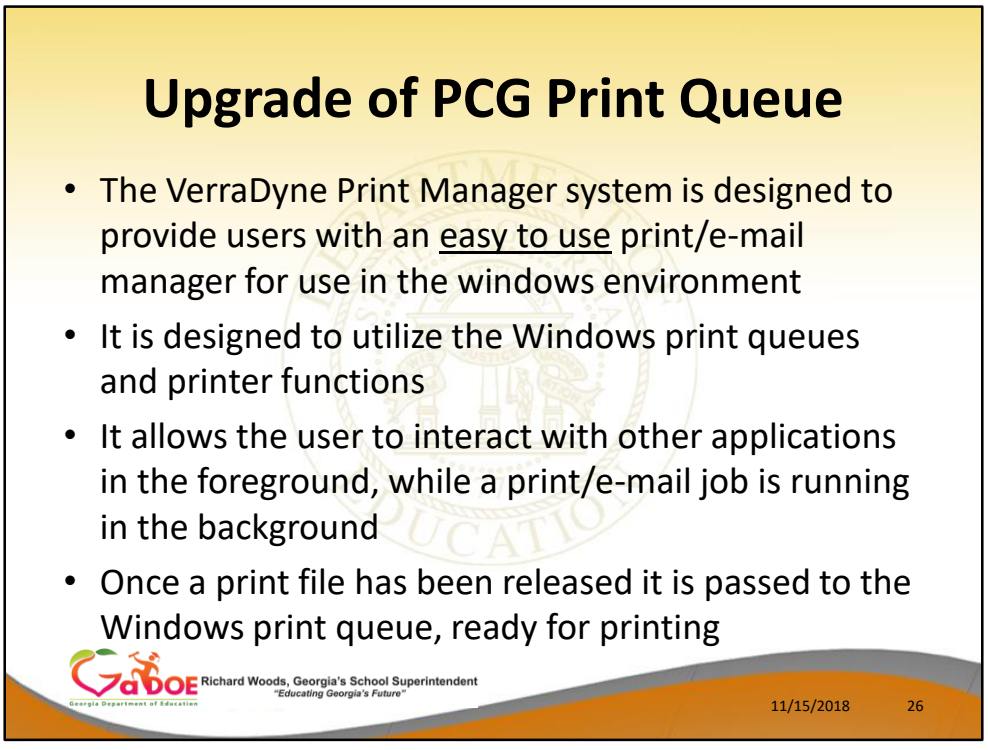
- The **old** PCGenesis print queue:



- The DOE rolled out a major upgrade of the PCGenesis Print Queue!
- Recently, school districts upgrading to Windows Server 2012 and Windows Server 2016 have experienced problems using the old version of the print queue in printing their reports.
- Specifically, quite a few sites have problems with the reports printing in portrait and with a large font instead of landscape.
- Since the DOE didn't own the source code for the existing print queue, we couldn't correct the issues.



- The DOE purchased the VerraDyne Print Manager for a cost of $25,000 to replace the existing PCGenesis print queue
- The new VerraDyne Print Manager has much in common with the existing PCGenesis print queue because the same company created both systems

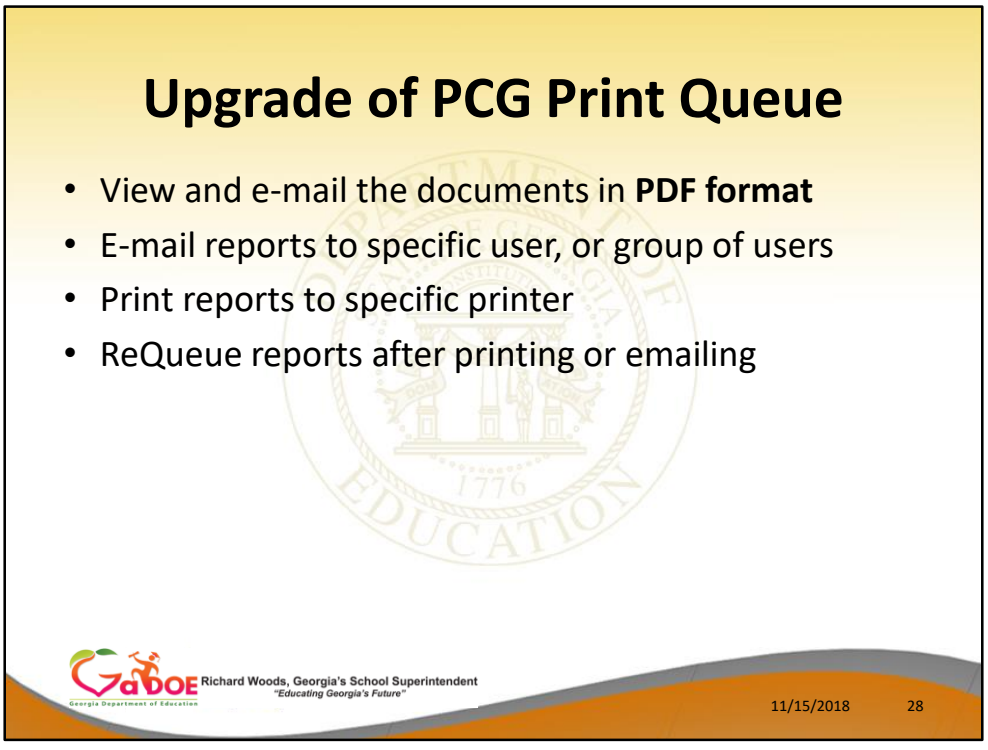


- The VerraDyne Print Manager system is designed to provide users with an easy to use print/e-mail manager for use in the windows environment
- Just like our existing PCGenesis print queue, it is designed to utilize the Windows print queues and printer functions
- Just like our existing PCGenesis print queue, it allows the user to interact with other applications in the foreground, while a print/e-mail job is running in the background
- Once a print file has been released it is passed to the Windows print queue, ready for printing

Upgrade of PCG Print Queue

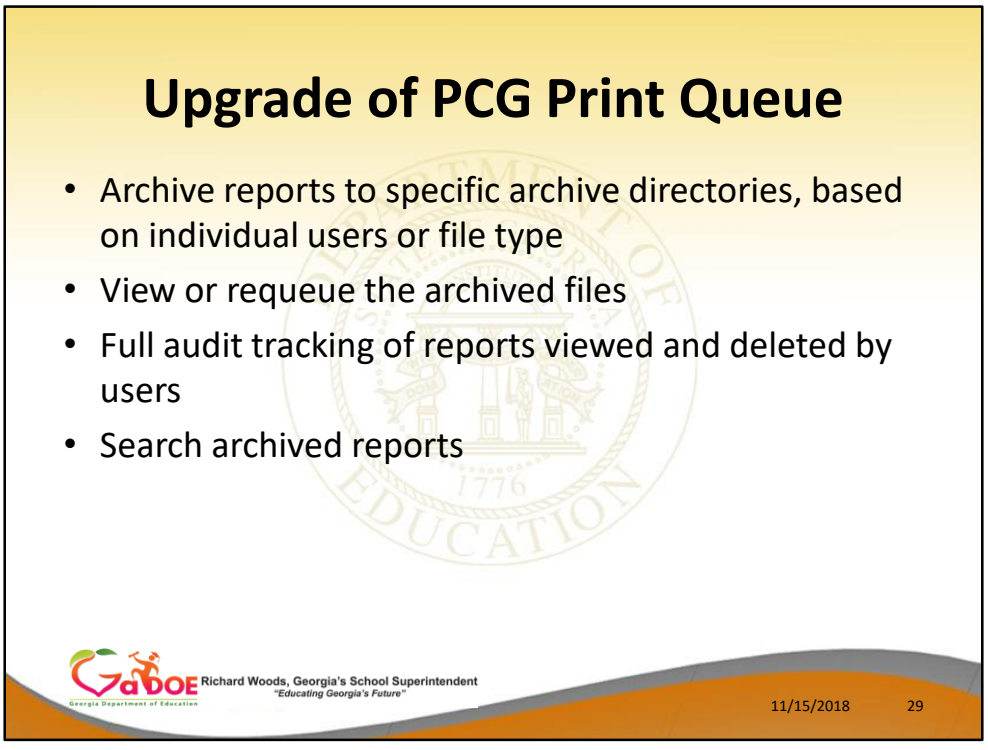
- The VerraDyne Print Manager stores data in the FREE version of **Microsoft SQL Server**.
- PCGenesis connects to **SQL Server Database** using windows security.

- Unlike our existing PCGenesis print queue, the VerraDyne Print Manager (UCTQUEUE) stores its data in **SQL Server Tables** to which it connects using **windows authentication**
- The VerraDyne Print Manager uses the FREE version of **Microsoft SQL Server** called **SQL Server Express**



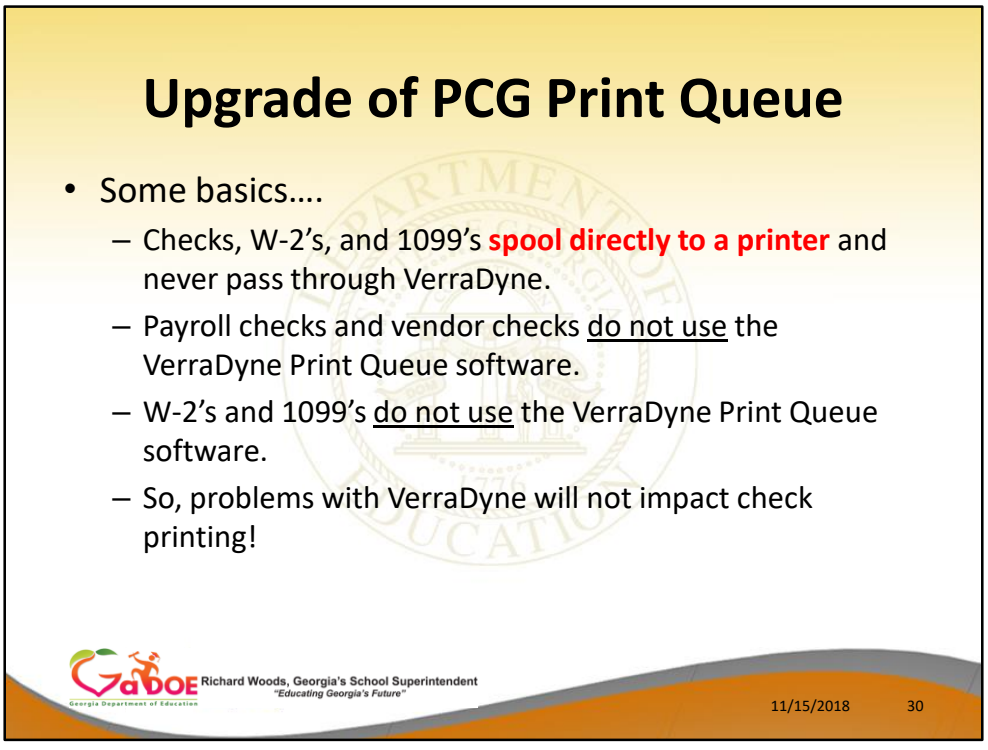
Some of the features of the new VerraDyne Print Manager system:

- You can view and e-mail the documents in **PDF format**
- You can e-mail reports to specific user, or group of users
- You can print reports to specific printer
- Just like our existing PCGenesis print queue, you can re-queue reports after printing or emailing



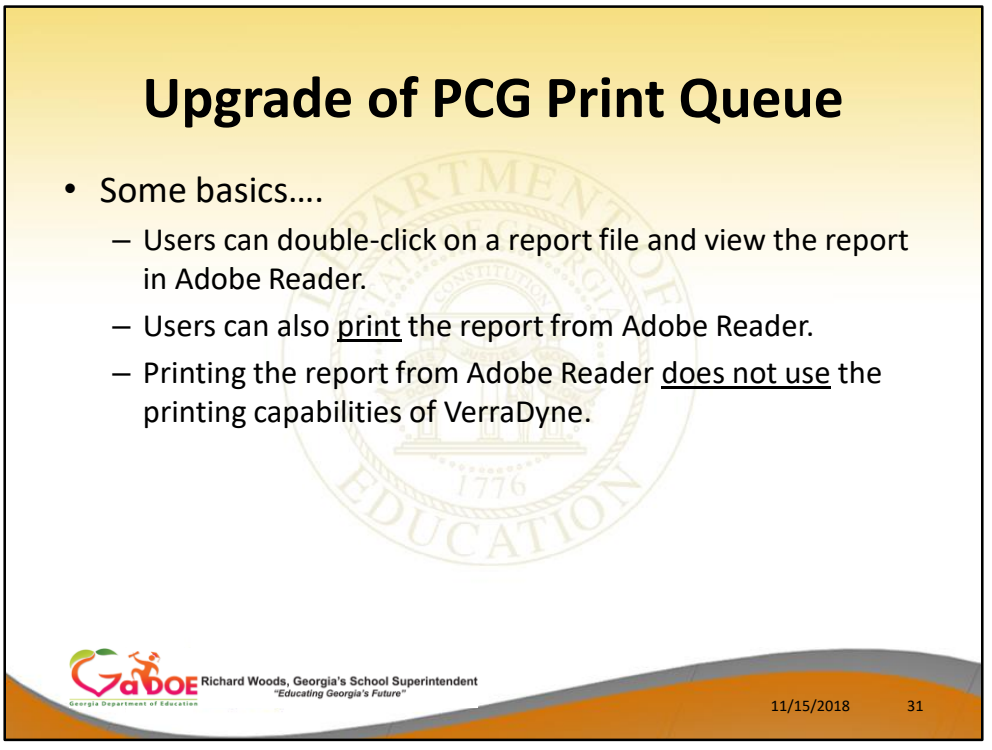
Some of the features of the new VerraDyne Print Manager system:

- You can archive reports to specific archive directories, based on individual users or file type
- You can view or requeue the archived files
- Full audit tracking of reports viewed and deleted by users is available
- You can search archived reports using specific parameters



Some basics….

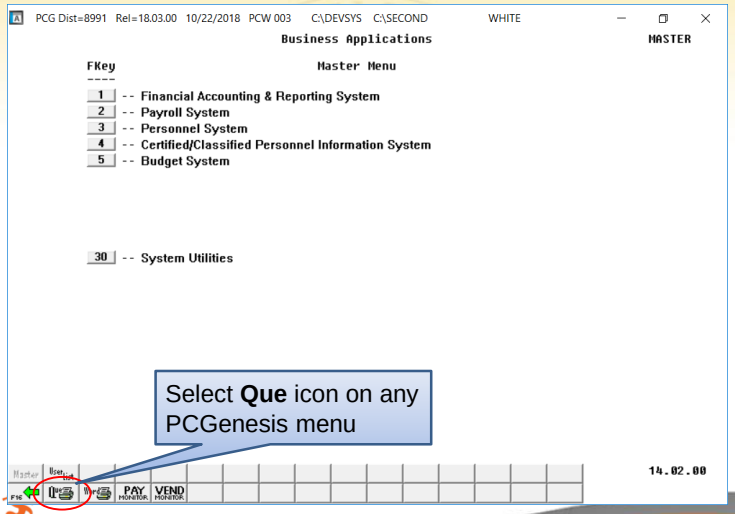
- Checks, W-2's, and 1099's **spool directly to a printer** and never pass through VerraDyne.
- Payroll checks and vendor checks do not use the VerraDyne Print Queue software.
- W-2's and 1099's do not use the VerraDyne Print Queue software.
- So, problems with VerraDyne will not impact check printing!



Some basics….

- Users can double-click on a report file and view the report in **Adobe Reader**.
- **Users can also print the report from Adobe Reader**.
- Printing the report from Adobe Reader does not use the printing capabilities of VerraDyne.

Upgrade of PCG Print Queue



To access the new VerraDyne Print Manager system:

- Select the **Que** icon on any PCGenesis menu.
- The is the recommended way to view PCGenesis reports.

Upgrade of PCG Print Queue

- The user can also access the *VerraDyne Queue Manager* from the desktop icon.
- From the user's workstation double-click the **PCGVQUE** icon

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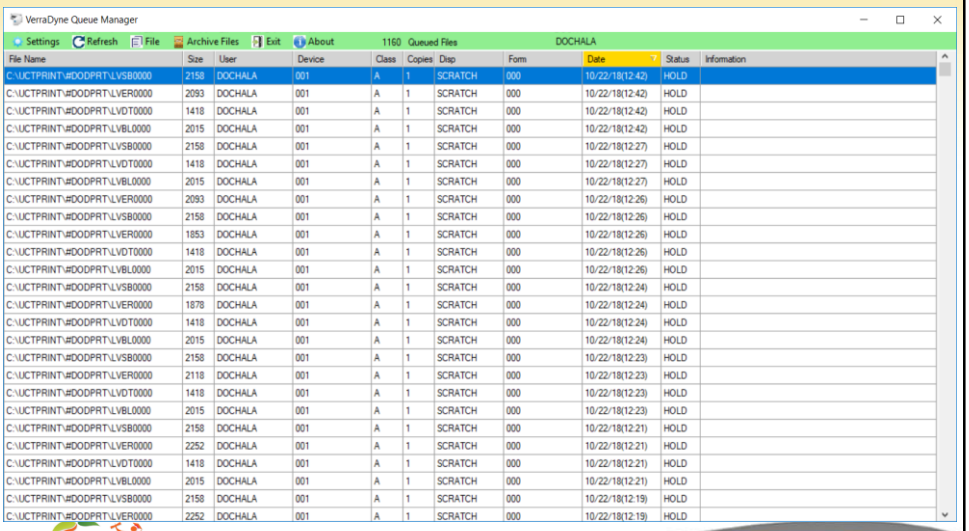
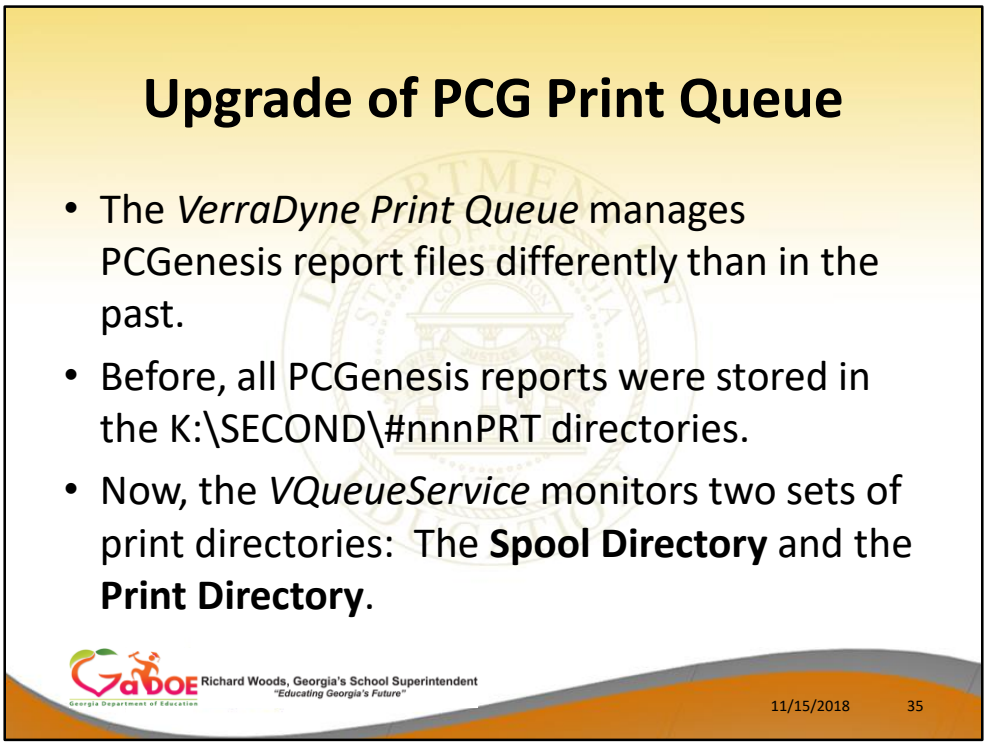
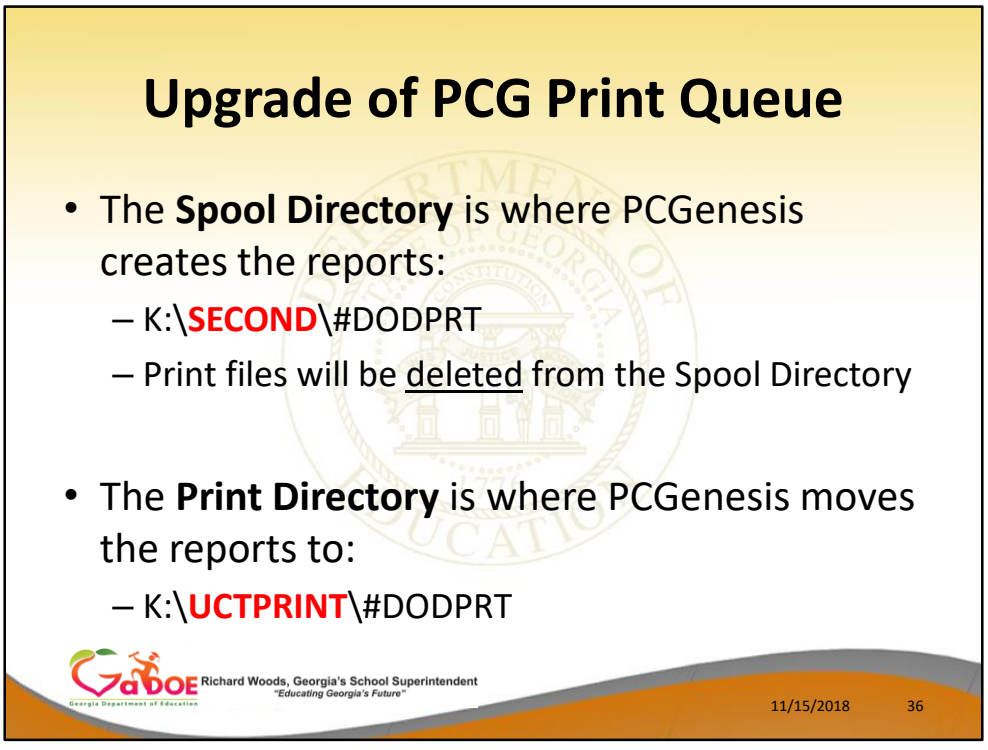
Upgrade of PCG Print Queue



- This is the ***VerraDyne Print Manager*** system
- It is very similar to the old PCGenesis Print Queue



- The *VerraDyne Print Queue* manages PCGenesis report files differently than in the past.
- Before, all PCGenesis reports were stored in the **K:\SECOND\#nnnPRT** directories.
- Now, the *VQueueService* monitors two sets of print directories: The **Spool Directory** and the **Print Directory**.



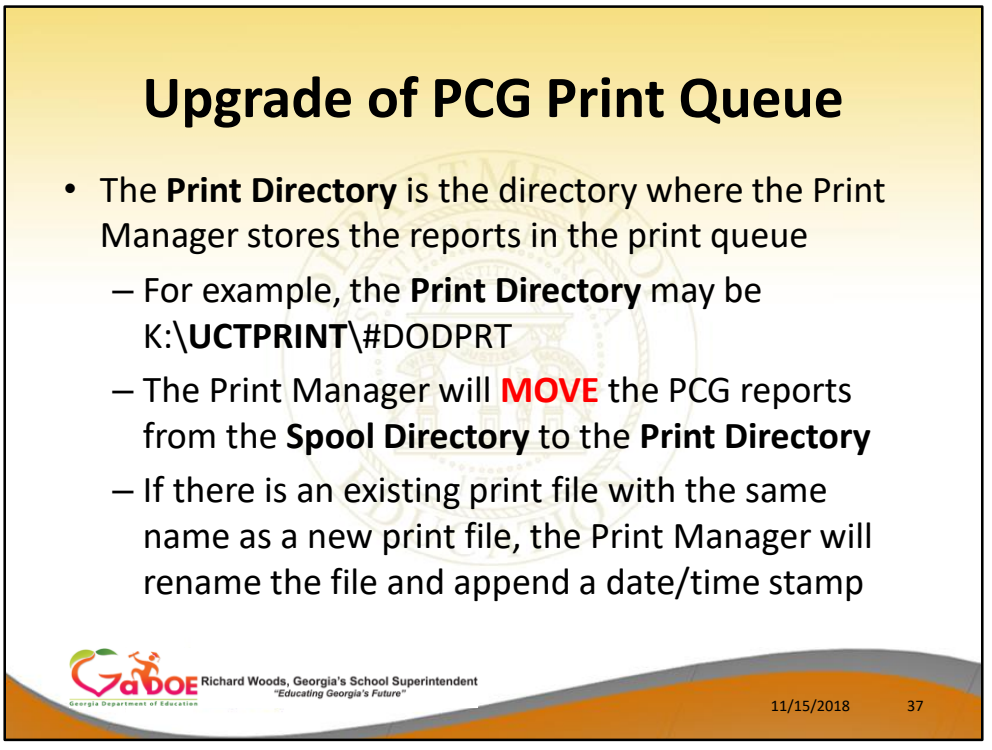
The **Spool Directory** is where PCGenesis creates the reports:

K:**SECOND**\#DODPRT

Print files will be **deleted** from the Spool Directory

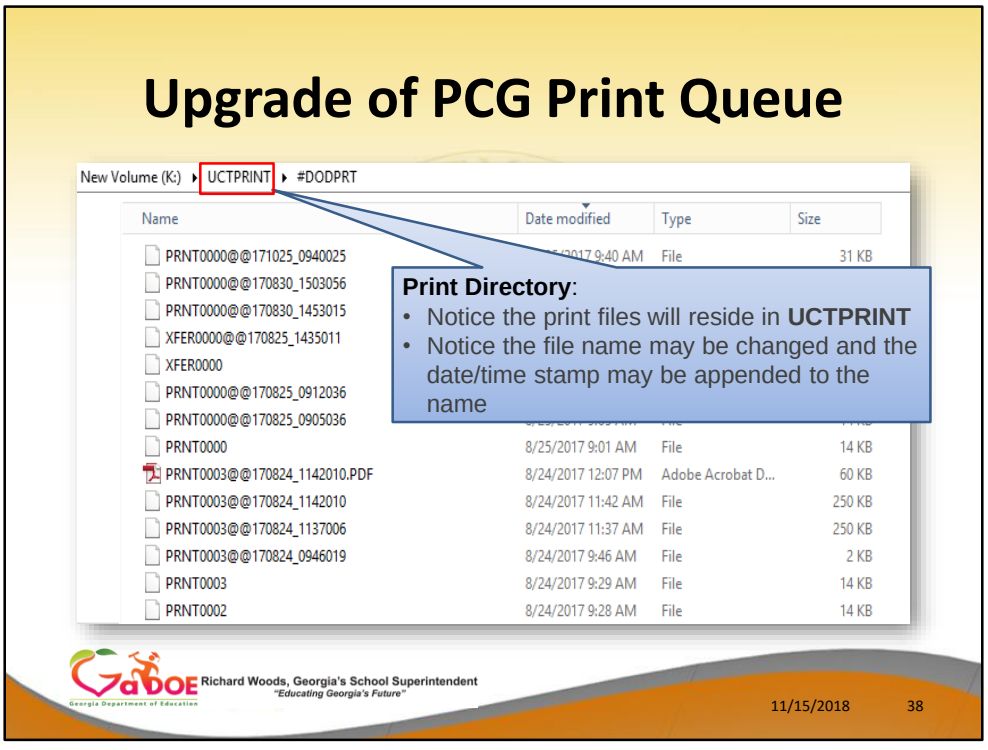
The **Print Directory** is where PCGenesis **moves** the reports to:

K:**UCTPRINT**\#DODPRT



The **Print Directory** is the directory where the Print Manager stores the reports in the print queue

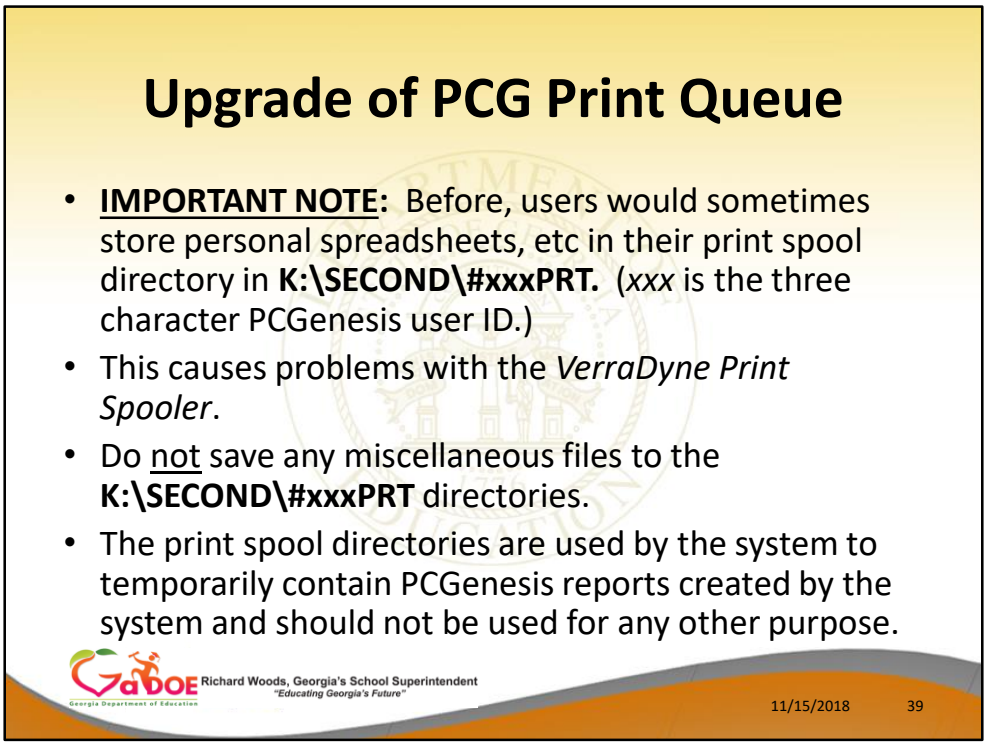
- For example, the **Print Directory** may be K:**UCTPRINT**\#DODPRT
- The Print Manager will **MOVE** the PCG reports from the **Spool Directory** to the **Print Directory**
- If there is an existing print file with the same name as a new print file, the Print Manager will **rename the file and append a date/time stamp**



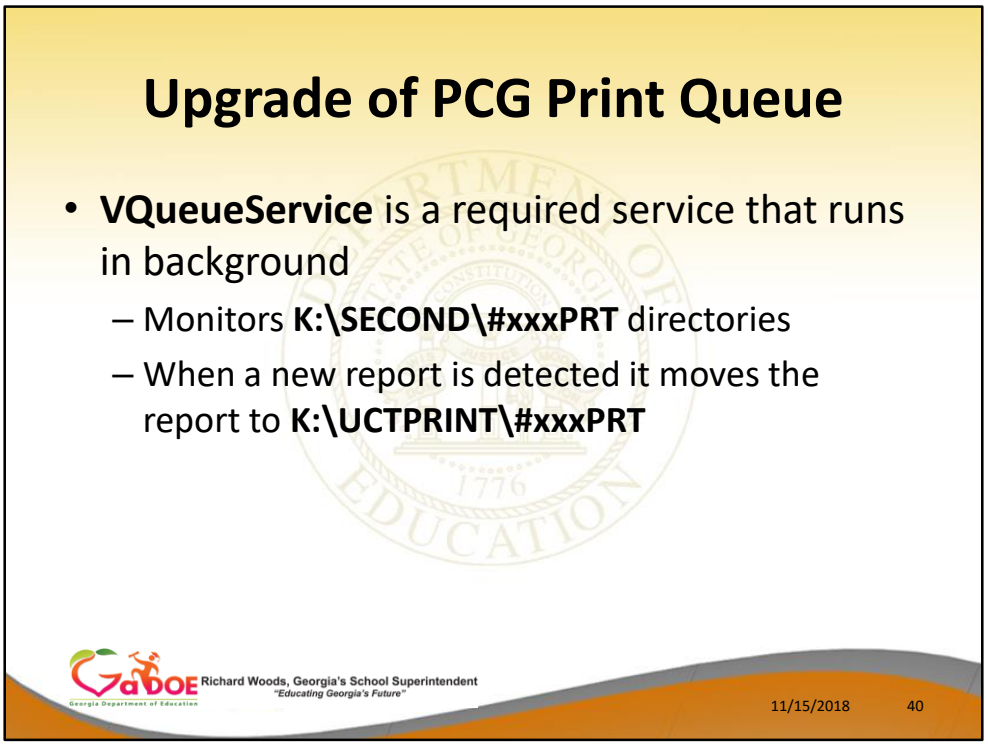
- The **Print Directory** is where PCGenesis **moves** the reports to:

  K:**UCTPRINT**\#DODPRT

- Notice the **file name may be changed and the date/time stamp may be appended** to the name

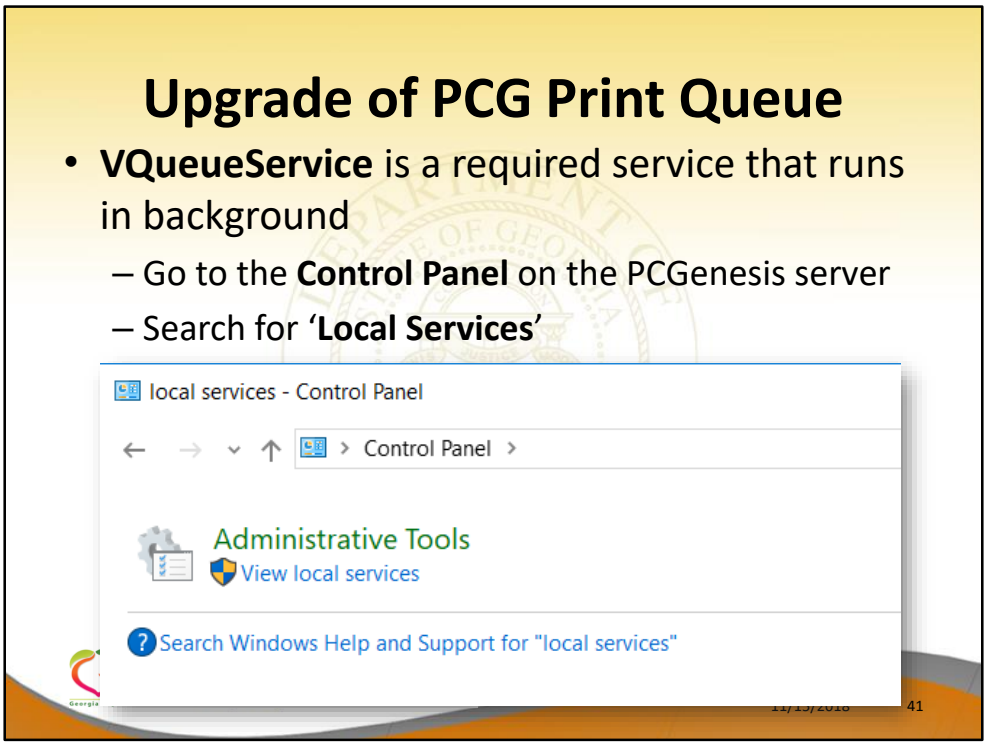


- Before, users would sometimes store personal spreadsheets, etc in their print spool directory in **K:\SECOND\#xxxPRT.** (*xxx* is the three character PCGenesis user ID.)
- This causes problems with the *VerraDyne Print Spooler*.
- **Do not save any miscellaneous files** to the **K:\SECOND\#xxxPRT** directories.
- The print spool directories are used by the system to temporarily contain PCGenesis reports created by the system and should not be used for any other purpose.



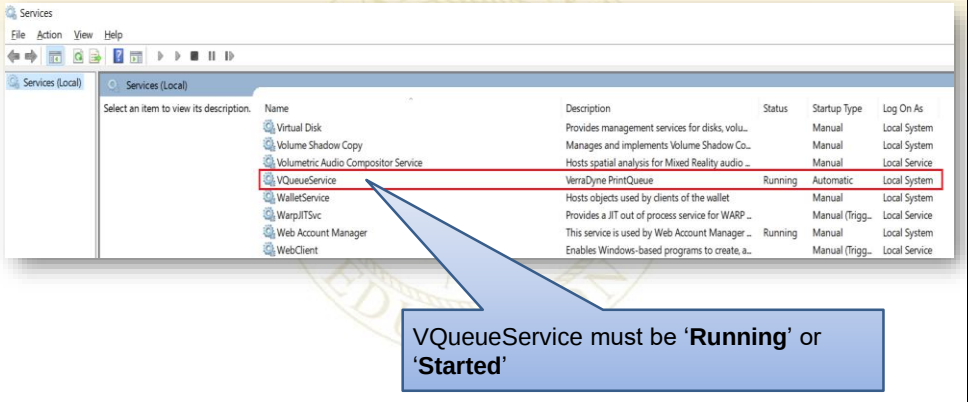
VQueueService is a required service that runs in background

- Monitors **K:\SECOND\#xxxPRT** directories
- When a new report is detected it moves the report to **K:\UCTPRINT\#xxxPRT**



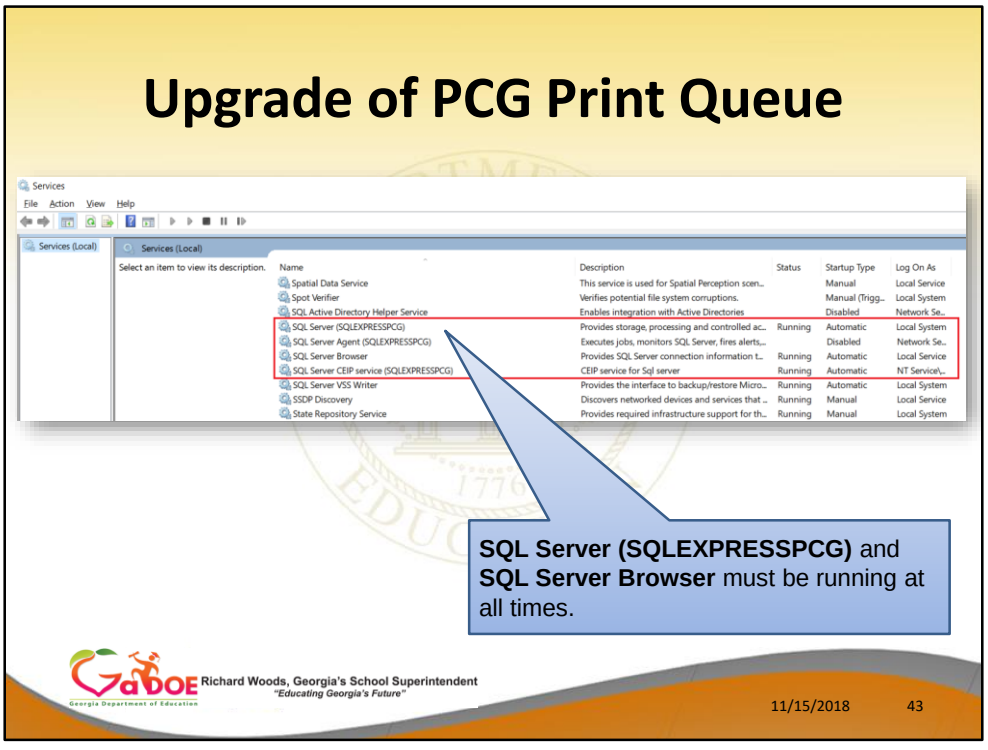
- **VQueueService** is a required service that runs in background
- To see the **VQueueService**…
  - Go to the **Control Panel** on the PCGenesis server
  - Search for '**Local Services**'

Upgrade of PCG Print Queue



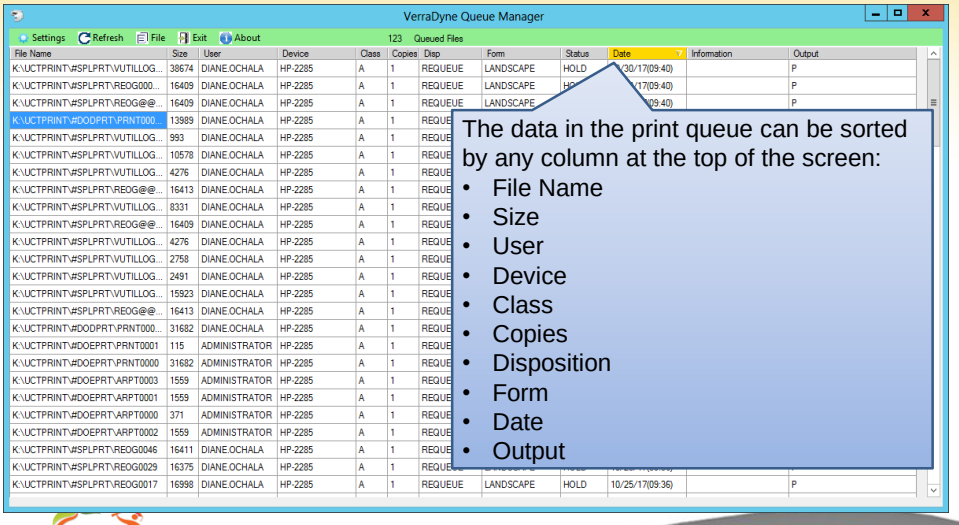
VQueueService must be '**Running**' or '**Started**'

- **VQueueService** is a required service that runs in background
- To see the **VQueueService**…
  - Go to the **Control Panel** on the PCGenesis server
  - Search for '**Local Services**'
  - The **VQueueService** must be '**Running**' or '**Started**'

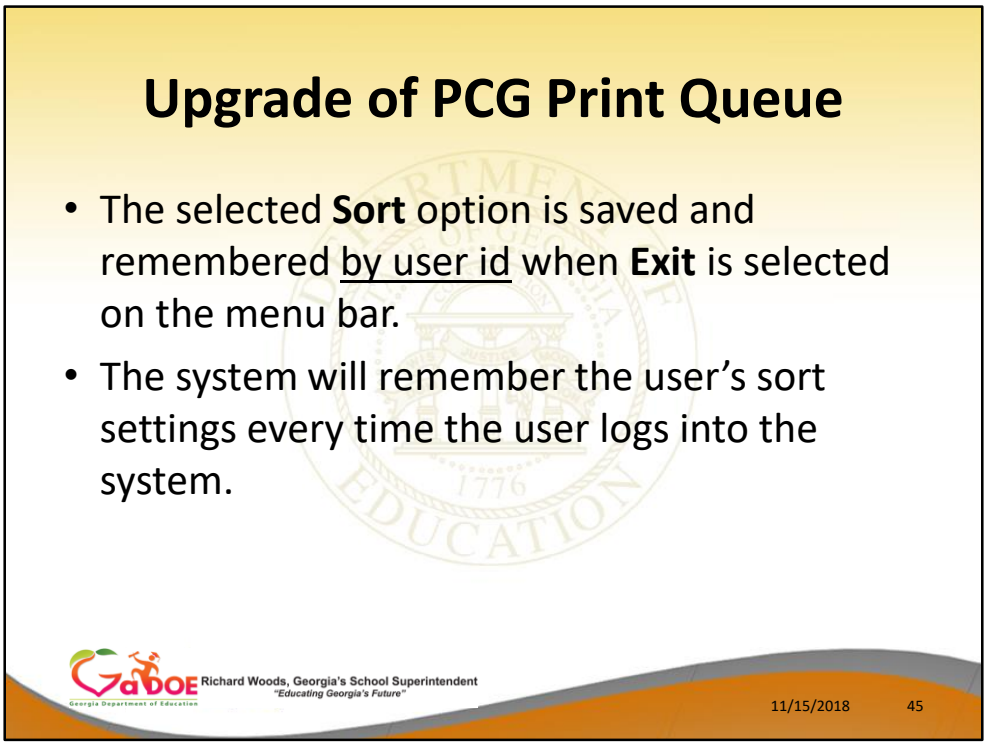


- **VQueueService** is a required service that runs in background
- VQueueService runs using **SQL Server Express**
- To see the **VQueueService** and **SQL Server Express**…
  - Go to the **Control Panel** on the PCGenesis server
  - Search for '**Local Services**'
  - **SQL Server (SQLEXPRESSPCG)** and **SQL Server Browser** must be running at all times.

Upgrade of PCG Print Queue



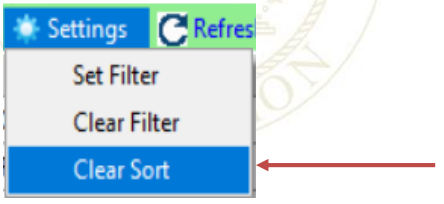
- The data in the print queue can be sorted by any column at the top of the screen:
  - File Name, Size, User, Device, Class, Copies, Disposition, Form, Date, Output



- The selected **Sort** option is saved and remembered by user id when **Exit** is selected on the menu bar.
- The system will remember the user's sort settings every time the user logs into the system.

Upgrade of PCG Print Queue

- If the PCGenesis reports do not appear to be sorted correctly, start by selecting the **Clear Sort** option before clicking on a column heading to sort the entries.



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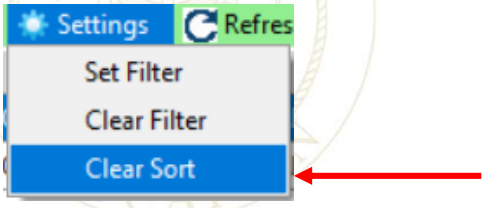
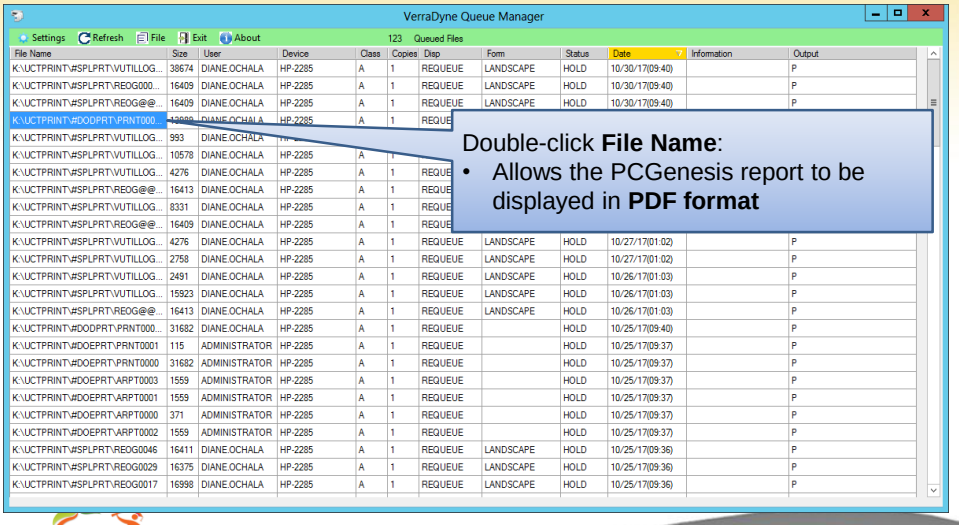
Upgrade of PCG Print Queue

- If you wish to reset the column sort, click **Settings** on menu bar, and select the **Clear Sort** option



If you wish to reset the column sort, click **Settings** on menu bar, and select the **Clear Sort** option

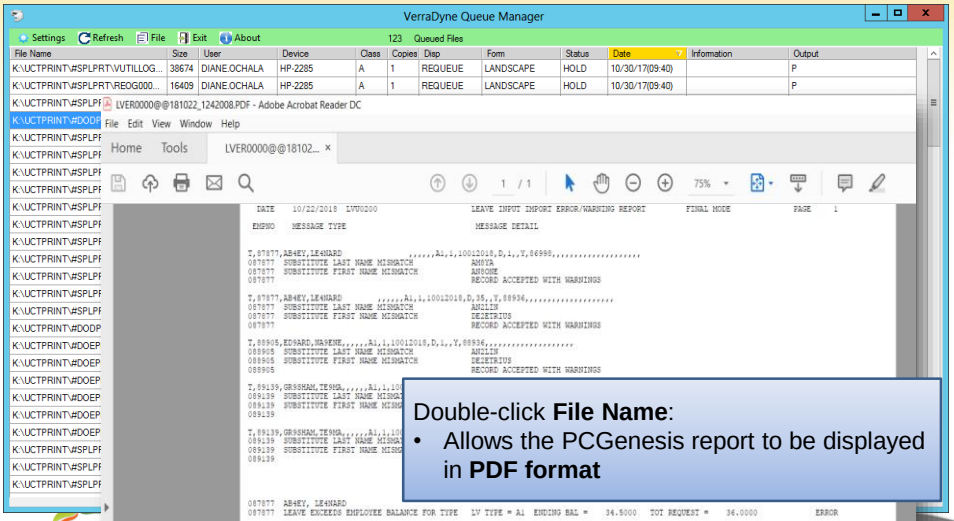
Upgrade of PCG Print Queue



Richard Woods, Georgia's School Superintendent
"Educating Georgia's Future"

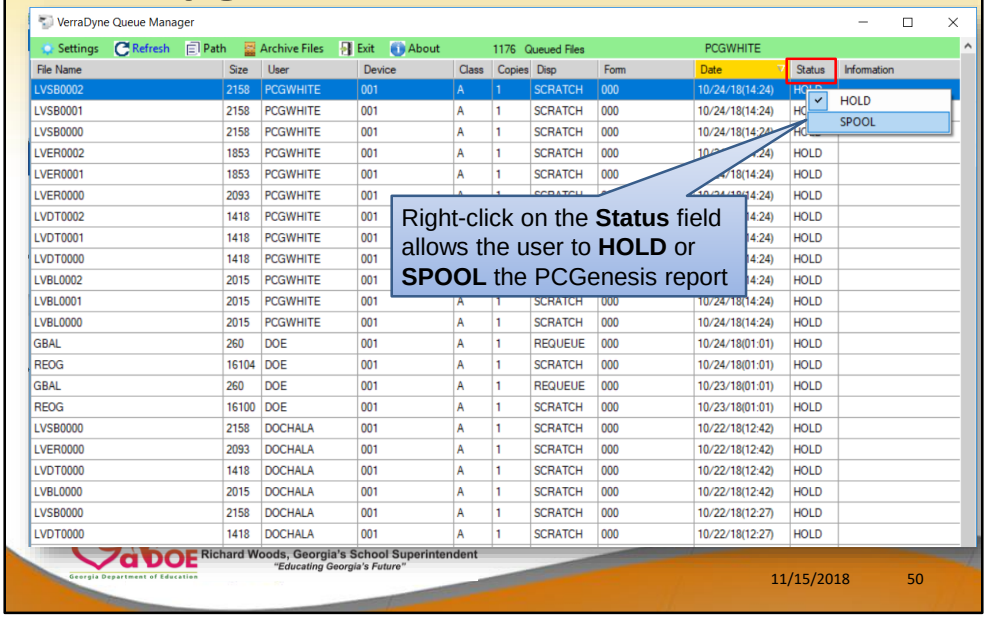
- Double-click **File Name**: Allows the PCGenesis report to be displayed in **PDF format**

Upgrade of PCG Print Queue



- Double-click **File Name**: Allows the PCGenesis report to be displayed in **PDF format**

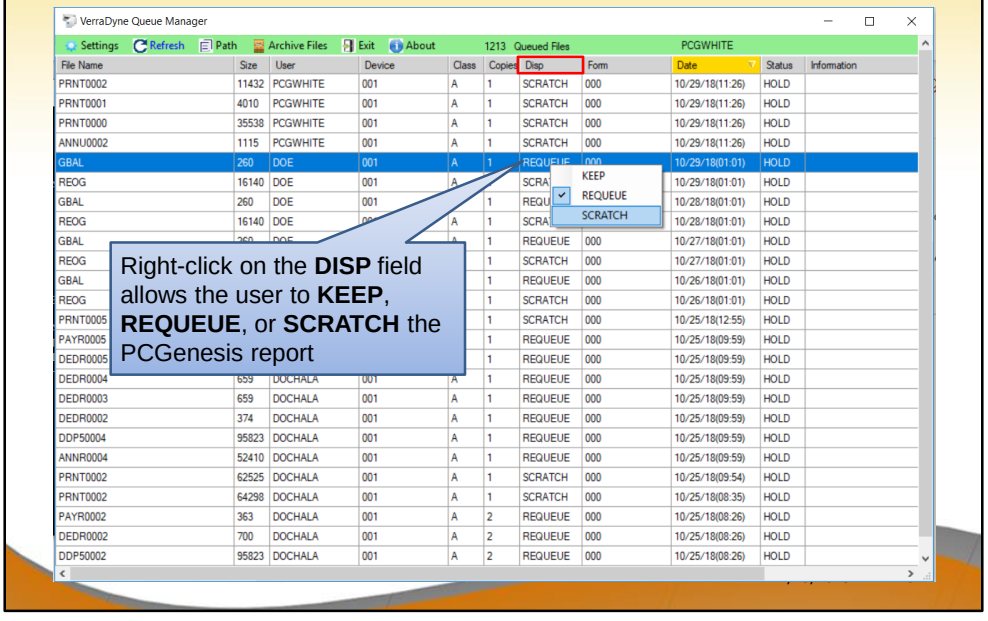
Upgrade of PCG Print Queue



File Name	Size	User	Device	Class	Copies	Disp	Form	Date	Status	Information
LVSB0002	2158	PCGWHITE	001	A	1	SCRATCH	000	10/24/18(14:24)	HOLD	
LVSB0001	2158	PCGWHITE	001	A	1	SCRATCH	000	10/24/18(14:24)	HOLD	
LVSB0000	2158	PCGWHITE	001	A	1	SCRATCH	000	10/24/18(14:24)	HOLD	
LVER0002	1853	PCGWHITE	001	A	1	SCRATCH	000	10/24/18(14:24)	HOLD	
LVER0001	1853	PCGWHITE	001	A	1	SCRATCH	000	10/24/18(14:24)	HOLD	
LVER0000	2093	PCGWHITE	001	A	1	SCRATCH	000	10/24/18(14:24)	HOLD	
LVDT0002	1418	PCGWHITE	001	A	1	SCRATCH	000	10/24/18(14:24)	HOLD	
LVDT0001	1418	PCGWHITE	001	A	1	SCRATCH	000	10/24/18(14:24)	HOLD	
LVDT0000	1418	PCGWHITE	001	A	1	SCRATCH	000	10/24/18(14:24)	HOLD	
LVBL0002	2015	PCGWHITE	001	A	1	SCRATCH	000	10/24/18(14:24)	HOLD	
LVBL0001	2015	PCGWHITE	001	A	1	SCRATCH	000	10/24/18(14:24)	HOLD	
LVBL0000	2015	PCGWHITE	001	A	1	SCRATCH	000	10/24/18(14:24)	HOLD	
GBAL	260	DOE	001	A	1	REQUEUE	000	10/24/18(01:01)	HOLD	
REOG	16104	DOE	001	A	1	SCRATCH	000	10/24/18(01:01)	HOLD	
GBAL	260	DOE	001	A	1	REQUEUE	000	10/23/18(01:01)	HOLD	
REOG	16100	DOE	001	A	1	SCRATCH	000	10/23/18(01:01)	HOLD	
LVSB0000	2158	DOCHALA	001	A	1	SCRATCH	000	10/22/18(12:42)	HOLD	
LVER0000	2093	DOCHALA	001	A	1	SCRATCH	000	10/22/18(12:42)	HOLD	
LVDT0000	1418	DOCHALA	001	A	1	SCRATCH	000	10/22/18(12:42)	HOLD	
LVBL0000	2015	DOCHALA	001	A	1	SCRATCH	000	10/22/18(12:42)	HOLD	
LVSB0000	2158	DOCHALA	001	A	1	SCRATCH	000	10/22/18(12:27)	HOLD	
LVDT0000	1418	DOCHALA	001	A	1	SCRATCH	000	10/22/18(12:27)	HOLD	

- Right-click on the **Status** field allows the user to **HOLD** or **SPOOL** the PCGenesis report

Upgrade of PCG Print Queue

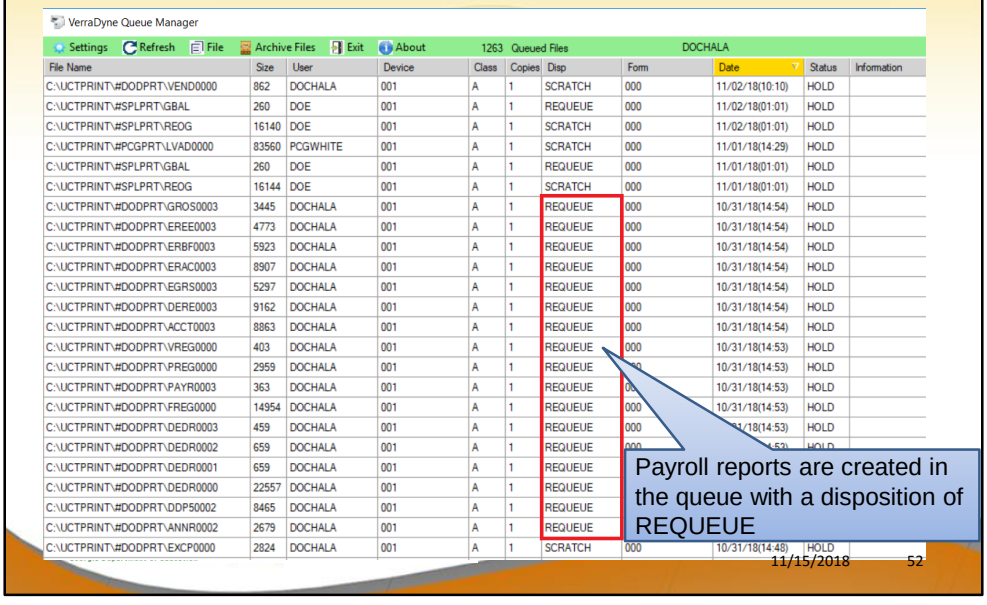


File Name	Size	User	Device	Class	Copies	Disp	Form	Date	Status	Information
PRNT0002	11432	PCGWHITE	001	A	1	SCRATCH	000	10/29/18(11:26)	HOLD	
PRNT0001	4010	PCGWHITE	001	A	1	SCRATCH	000	10/29/18(11:26)	HOLD	
PRNT0000	35538	PCGWHITE	001	A	1	SCRATCH	000	10/29/18(11:26)	HOLD	
ANNU0002	1115	PCGWHITE	001	A	1	SCRATCH	000	10/29/18(11:26)	HOLD	
GBAL	260	DOE	001	A	1	REQUEUE	000	10/29/18(01:01)	HOLD	
REOG	16140	DOE	001	A		SCRA		10/29/18(01:01)	HOLD	
GBAL	260	DOE	001		1	REQU		10/28/18(01:01)	HOLD	
REOG	16140	DOE		A	1	SCRA		10/28/18(01:01)	HOLD	
GBAL				A	1	REQUEUE	000	10/27/18(01:01)	HOLD	
REOG					1	SCRATCH	000	10/27/18(01:01)	HOLD	
GBAL					1	REQUEUE	000	10/26/18(01:01)	HOLD	
REOG					1	SCRATCH	000	10/26/18(01:01)	HOLD	
PRNT0005					1	SCRATCH	000	10/25/18(12:55)	HOLD	
PAYR0005					1	REQUEUE	000	10/25/18(09:59)	HOLD	
DEDR0005					1	REQUEUE	000	10/25/18(09:59)	HOLD	
DEDR0004	659	DOCHALA	001	A	1	REQUEUE	000	10/25/18(09:59)	HOLD	
DEDR0003	659	DOCHALA	001	A	1	REQUEUE	000	10/25/18(09:59)	HOLD	
DEDR0002	374	DOCHALA	001	A	1	REQUEUE	000	10/25/18(09:59)	HOLD	
DDP50004	95823	DOCHALA	001	A	1	REQUEUE	000	10/25/18(09:59)	HOLD	
ANNR0004	52410	DOCHALA	001	A	1	REQUEUE	000	10/25/18(09:59)	HOLD	
PRNT0002	62525	DOCHALA	001	A	1	SCRATCH	000	10/25/18(09:54)	HOLD	
PRNT0002	64298	DOCHALA	001	A	1	SCRATCH	000	10/25/18(08:35)	HOLD	
PAYR0002	363	DOCHALA	001	A	2	REQUEUE	000	10/25/18(08:26)	HOLD	
DEDR0002	700	DOCHALA	001	A	2	REQUEUE	000	10/25/18(08:26)	HOLD	
DDP50002	95823	DOCHALA	001	A	2	REQUEUE	000	10/25/18(08:26)	HOLD	

<u>To change the Disposition of a print file</u>:
The disposition of a print file can be changed by **right clicking** on the disposition (**Disp**) field for the print file and selecting the desired option.
Disposition, valid values are:

- ***SCRATCH* -** After printing or emailing, the document entry will be removed from the print queue and the file on the disk will be <u>scratched</u>.
- ***KEEP* -** After printing or emailing, the document entry will be removed from the print queue. The document on the disk will <u>not be scratched</u>.
- ***REQUEUE* -** After printing or emailing, the document entry will <u>remain</u> in the print queue in HOLD status and the file on the disk will be <u>not be scratched</u>. The entry status will be set back to HOLD after printing or emailing.

Upgrade of PCG Print Queue



File Name	Size	User	Device	Class	Copies	Disp	Form	Date	Status	Information
C:\UCTPRINT\#DODPRT\VEND0000	862	DOCHALA	001	A	1	SCRATCH	000	11/02/18(10:10)	HOLD	
C:\UCTPRINT\#SPLPRT\GBAL	260	DOE	001	A	1	REQUEUE	000	11/02/18(01:01)	HOLD	
C:\UCTPRINT\#SPLPRT\REOG	16140	DOE	001	A	1	SCRATCH	000	11/02/18(01:01)	HOLD	
C:\UCTPRINT\#PCGPRT\LVAD0000	83560	PCGWHITE	001	A	1	SCRATCH	000	11/01/18(14:29)	HOLD	
C:\UCTPRINT\#SPLPRT\GBAL	260	DOE	001	A	1	REQUEUE	000	11/01/18(01:01)	HOLD	
C:\UCTPRINT\#SPLPRT\REOG	16144	DOE	001	A	1	SCRATCH	000	11/01/18(01:01)	HOLD	
C:\UCTPRINT\#DODPRT\GROS0003	3445	DOCHALA	001	A	1	REQUEUE	000	10/31/18(14:54)	HOLD	
C:\UCTPRINT\#DODPRT\EREE0003	4773	DOCHALA	001	A	1	REQUEUE	000	10/31/18(14:54)	HOLD	
C:\UCTPRINT\#DODPRT\ERBF0003	5923	DOCHALA	001	A	1	REQUEUE	000	10/31/18(14:54)	HOLD	
C:\UCTPRINT\#DODPRT\ERAC0003	8907	DOCHALA	001	A	1	REQUEUE	000	10/31/18(14:54)	HOLD	
C:\UCTPRINT\#DODPRT\EGRS0003	5297	DOCHALA	001	A	1	REQUEUE	000	10/31/18(14:54)	HOLD	
C:\UCTPRINT\#DODPRT\DERE0003	9162	DOCHALA	001	A	1	REQUEUE	000	10/31/18(14:54)	HOLD	
C:\UCTPRINT\#DODPRT\ACCT0003	8863	DOCHALA	001	A	1	REQUEUE	000	10/31/18(14:54)	HOLD	
C:\UCTPRINT\#DODPRT\VREG0000	403	DOCHALA	001	A	1	REQUEUE	000	10/31/18(14:53)	HOLD	
C:\UCTPRINT\#DODPRT\PREG0000	2959	DOCHALA	001	A	1	REQUEUE	000	10/31/18(14:53)	HOLD	
C:\UCTPRINT\#DODPRT\PAYR0003	363	DOCHALA	001	A	1	REQUEUE	000	10/31/18(14:53)	HOLD	
C:\UCTPRINT\#DODPRT\FREG0000	14954	DOCHALA	001	A	1	REQUEUE	000	10/31/18(14:53)	HOLD	
C:\UCTPRINT\#DODPRT\DEDR0003	459	DOCHALA	001	A	1	REQUEUE	000	10/31/18(14:53)	HOLD	
C:\UCTPRINT\#DODPRT\DEDR0002	659	DOCHALA	001	A	1	REQUEUE	000			
C:\UCTPRINT\#DODPRT\DEDR0001	659	DOCHALA	001	A	1	REQUEUE				
C:\UCTPRINT\#DODPRT\DEDR0000	22557	DOCHALA	001	A	1	REQUEUE				
C:\UCTPRINT\#DODPRT\DDP50002	8465	DOCHALA	001	A	1	REQUEUE				
C:\UCTPRINT\#DODPRT\ANNR0002	2679	DOCHALA	001	A	1	REQUEUE				
C:\UCTPRINT\#DODPRT\EXCP0000	2824	DOCHALA	001	A	1	SCRATCH	000	10/31/18(14:48)	HOLD	

- An enhancement has been made to payroll reports, vendor check reports, and financial monthly reports so that these reports are <u>not</u> automatically deleted from the print queue after being spooled to the printer.
- Now, these important reports are sent to the print queue with a disposition of **REQUEUE**

Upgrade of PCG Print Queue

- Successful printing of payroll reports and financial monthly reports is very important
- Before, these reports were created with a disposition of '**SCRATCH**'
- They were automatically deleted from the print queue after printing
- Before, if there was a network hiccup and the reports were spooled but never printed for some reason, the reports couldn't be recovered

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- Before, these reports were created with a disposition of '**SCRATCH**'
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Upgrade of PCG Print Queue

- With the *VerraDyne Print Queue*, these reports are not automatically deleted from the print queue after being spooled to the printer.
- These reports will be created in the *VerraDyne Print Queue* with the disposition '**REQUEUE**'
- This allows the reports to be spooled and respooled numerous times, if necessary

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- These reports will be created in the *VerraDyne Print Queue* with the disposition '**REQUEUE**'
- This allows the reports to be spooled and respooled numerous times, if necessary
- **Most PCGenesis reports will still be queued with a disposition of SCRATCH.**

Upgrade of PCG Print Queue

- **NOTE:** Even with a disposition of '**REQUEUE**', the reports will only remain in the print queue for **30 days** before being permanently deleted.
- The *VerraDyne Queue Manager* constantly cleans up old files and will delete files from the print queue after 30 days regardless of the disposition of the file.

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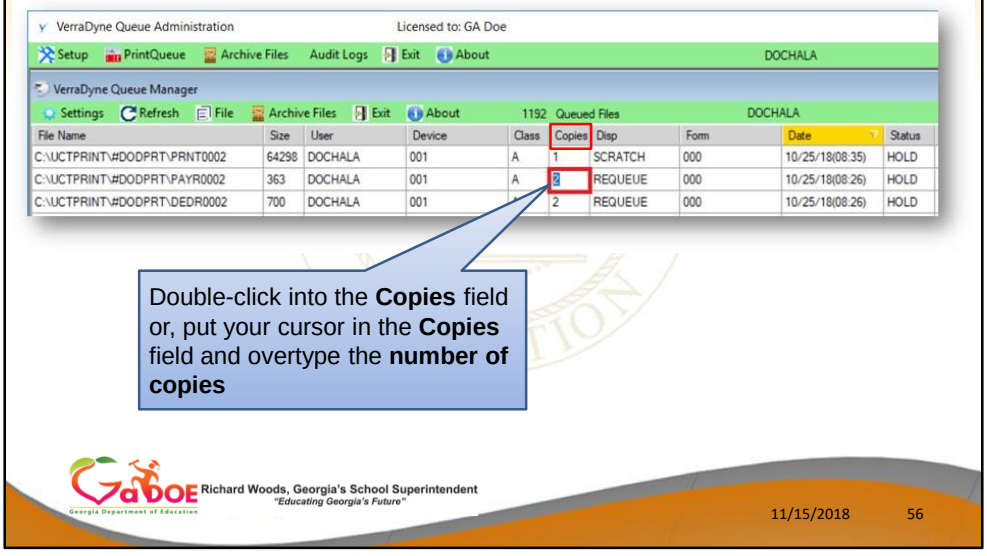
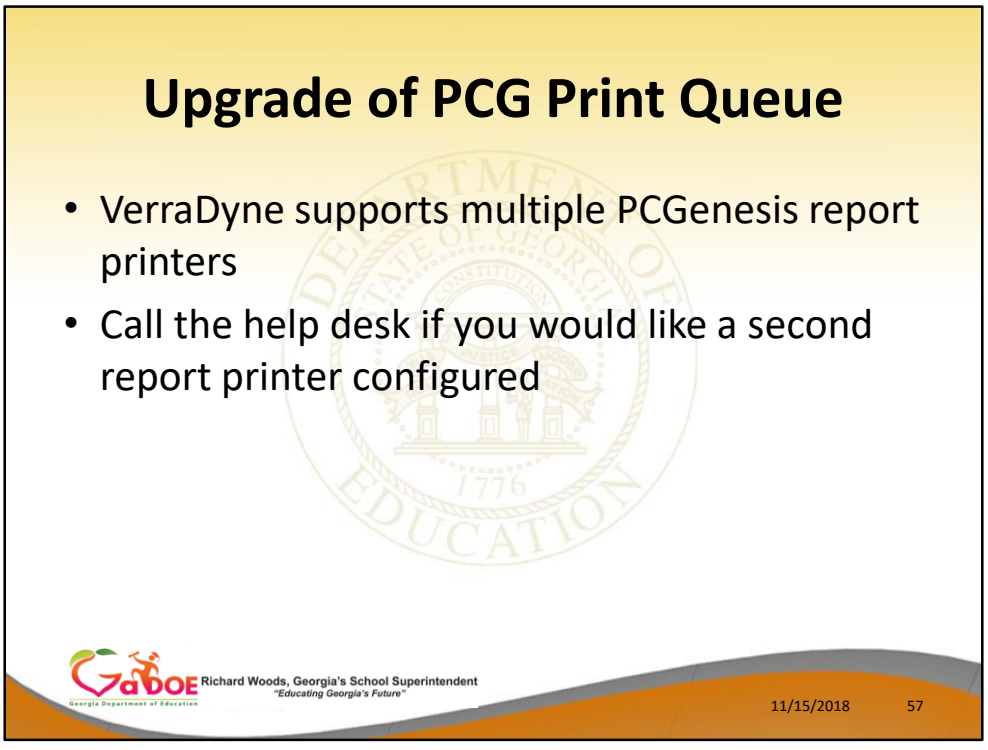
Upgrade of PCG Print Queue

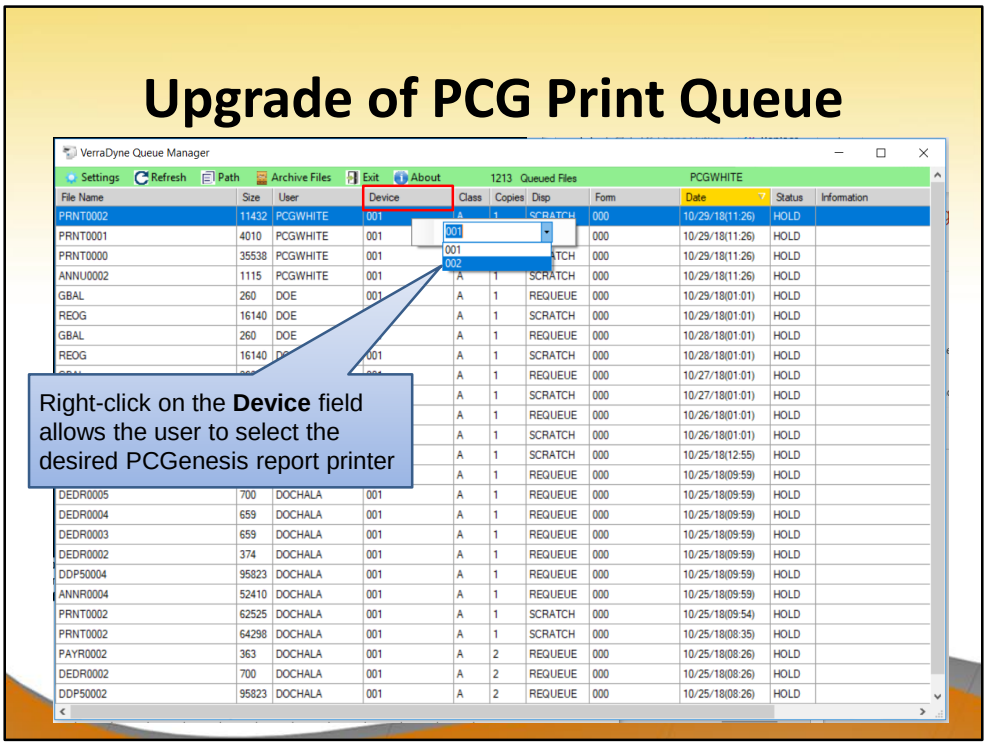


- The user can change the number of copies requested
- Double-click into the **Copies** field or, put your cursor in the **Copies** field and overtype the **number of copies**

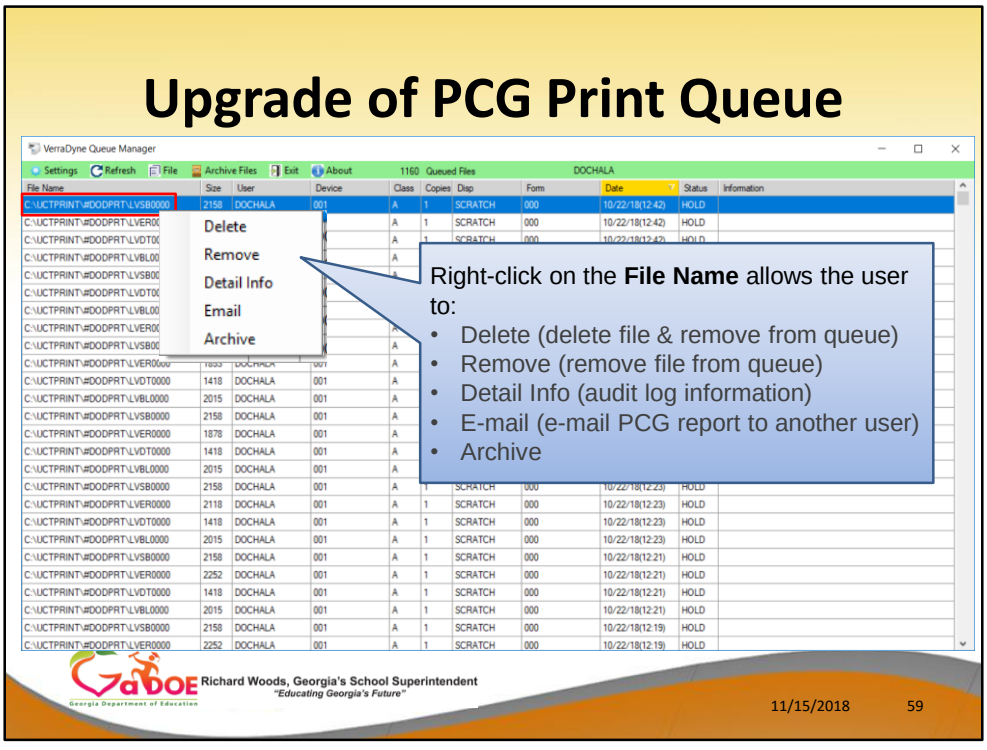


- VerraDyne supports **multiple PCGenesis report printers**
- Call the help desk if you would like a second report printer configured

Upgrade of PCG Print Queue

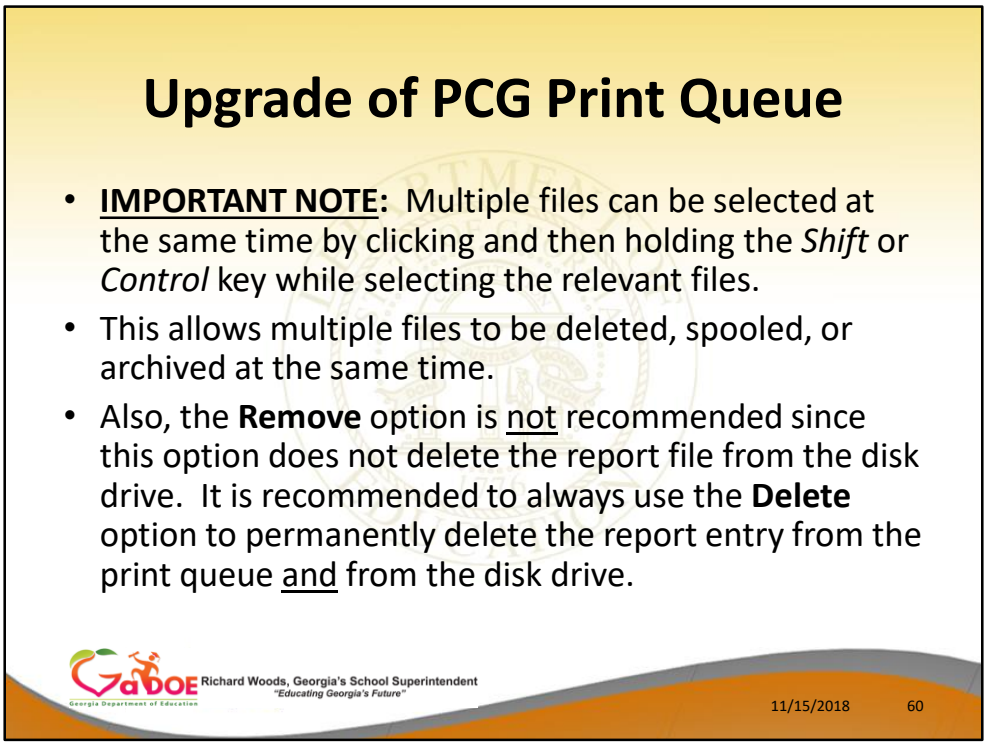


Right-click on the **Device** field allows the user to select the desired PCGenesis report printer

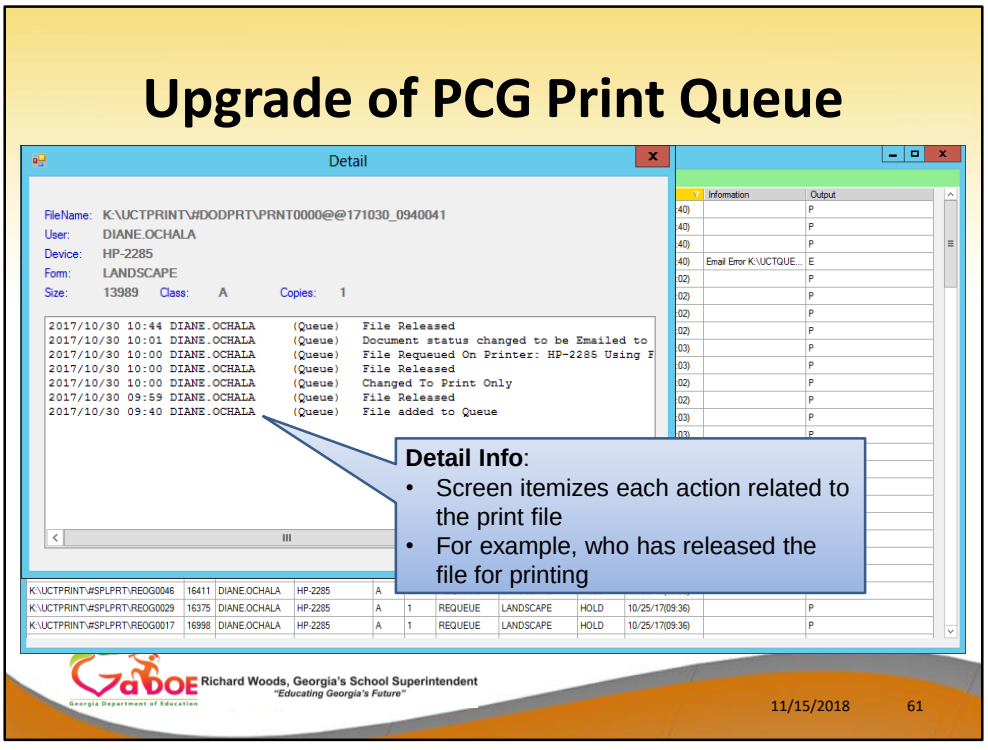


Right-click on the **File Name** allows the user to:

- **Delete** (delete file & remove from queue)
- **Remove** (remove file from queue)
- **Detail Info** (audit log information)
- **E-mail** (e-mail PCG report to another user)
- **Archive**



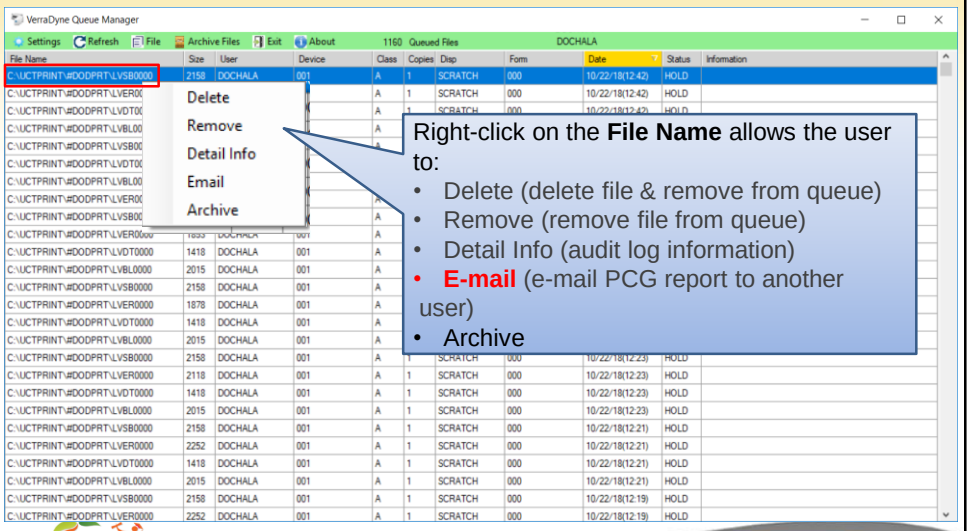
- Multiple files can be selected at the same time by clicking and then holding the *Shift* or *Control* key while selecting the relevant files.
- This allows multiple files to be deleted, spooled, or archived at the same time.
- Also, the **Remove** option is not recommended since this option does not delete the report file from the disk drive. It is recommended to always use the **Delete** option to permanently delete the report entry from the print queue and from the disk drive.



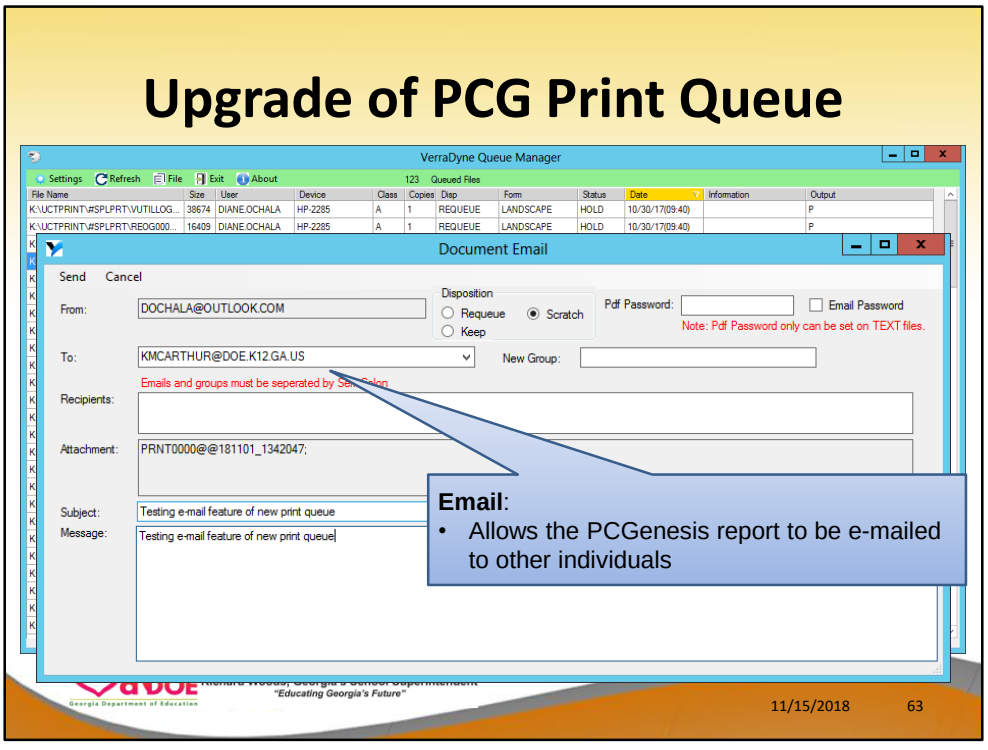
Detail Info:

- The Detail Info displays a screen which itemizes each action related to the print file
- For example, who has released the file for printing

Upgrade of PCG Print Queue

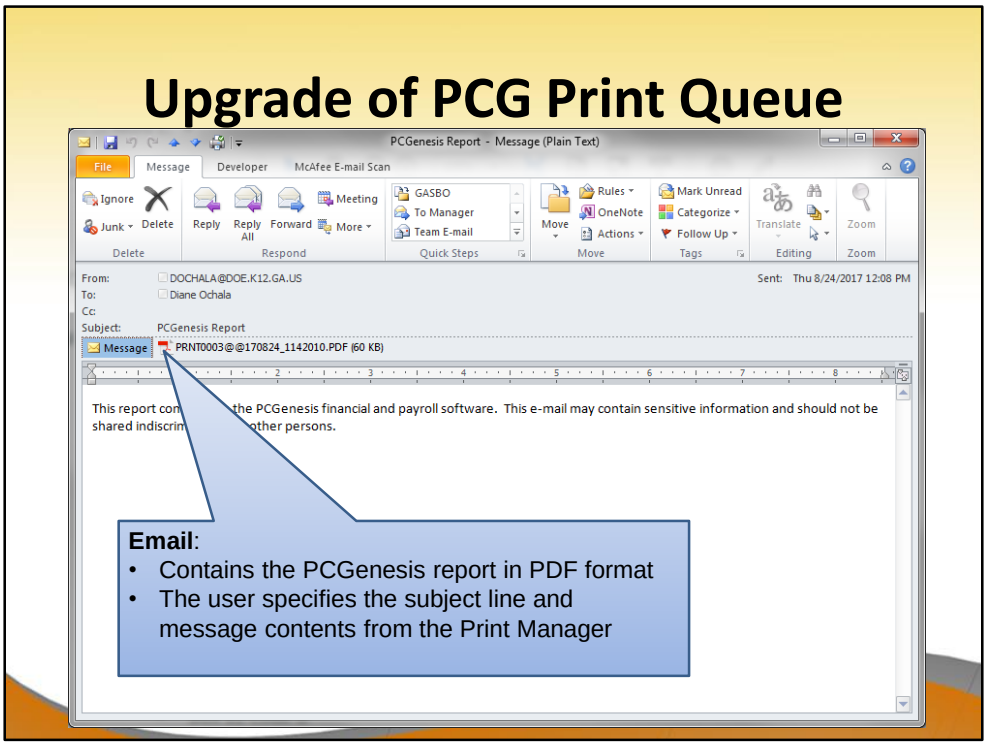


- PCGenesis reports can be **e-mailed** from the VerraDyne Print Manager.



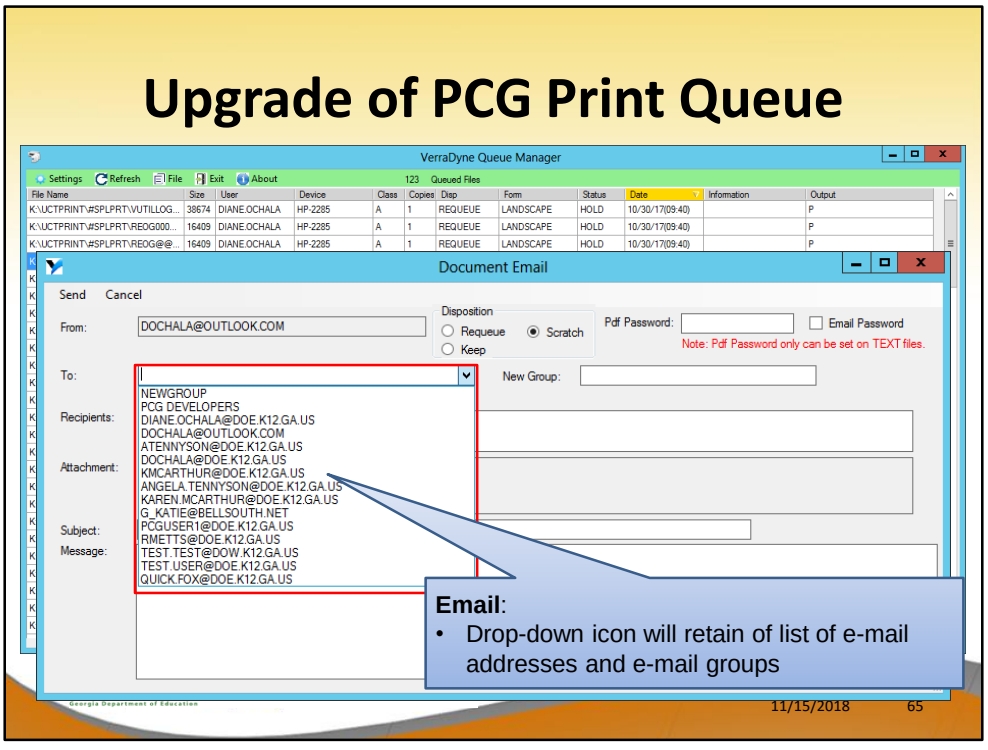
Email:

- Allows the PCGenesis report to be e-mailed to other individuals



Email:

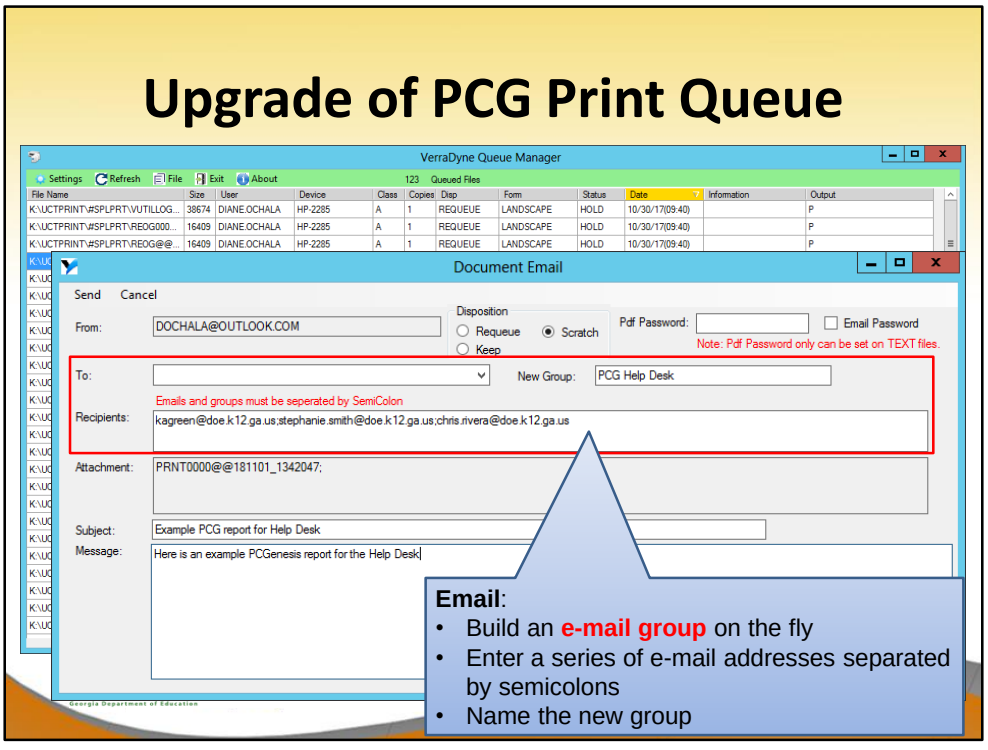
- This screen shows an e-mail generated by the VerraDyne Print Manager
- The e-mail contains the PCGenesis report in PDF format
- The user specifies the subject line and message contents from the Print Manager



Email:

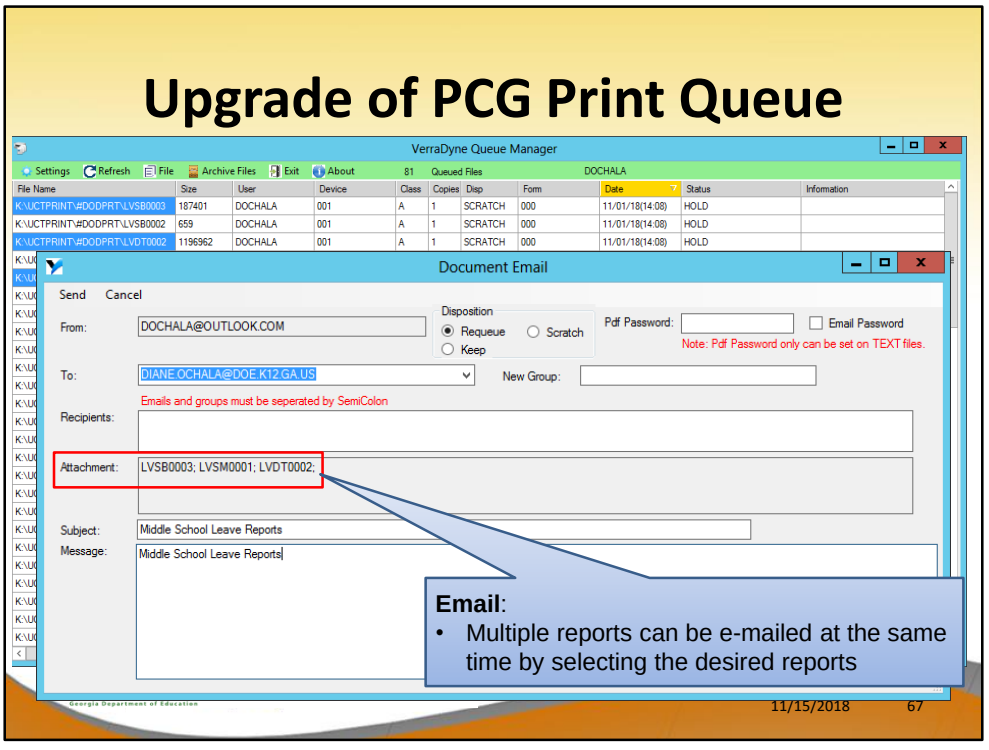
- Drop-down icon will retain of list of e-mail addresses and e-mail groups to make entering e-mail addresses easier

Upgrade of PCG Print Queue



Email:

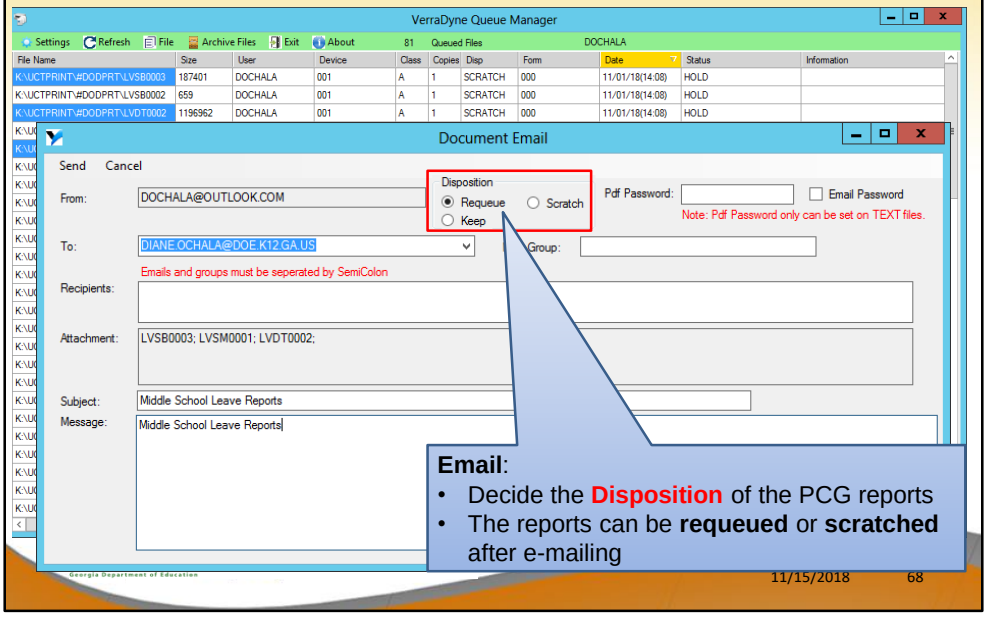
- Build an **e-mail group** on the fly
- Enter a series of e-mail addresses separated by semicolons
- Name the **New Group Name**



Email:

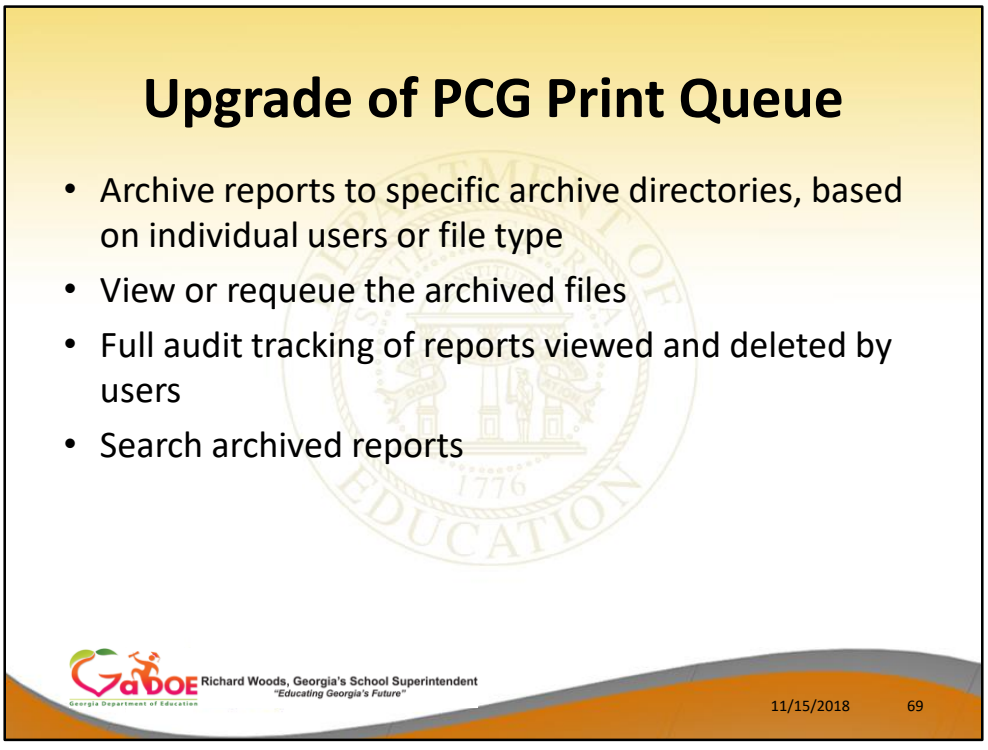
- Multiple reports can be e-mailed at the same time by selecting the desired reports

Upgrade of PCG Print Queue



After the report is Emailed:

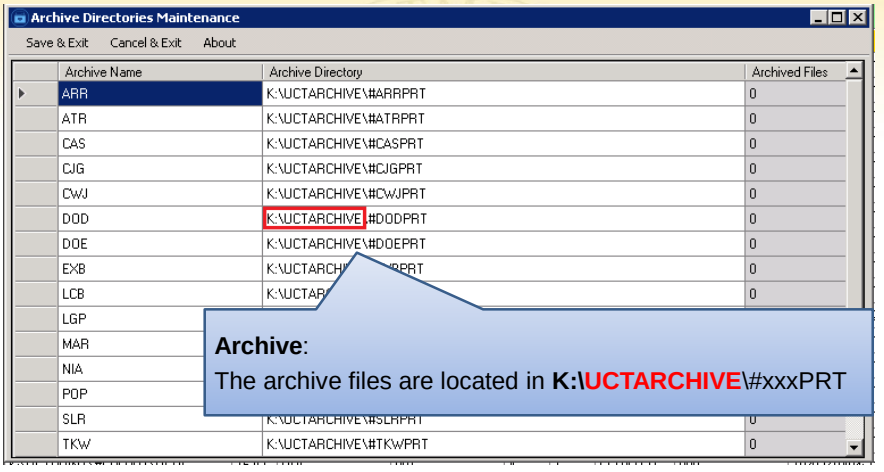
- Decide the **Disposition** of the PCG reports
- The reports can be **requeued** or **scratched** after e-mailing



Some of the features of the new VerraDyne Print Manager system:

- You will be able to archive reports to specific archive directories, based on individual users or file type
- You will be able to view or requeue the archived files
- Full audit tracking of reports viewed and deleted by users will be available
- You will be able to search archived reports using specific parameters

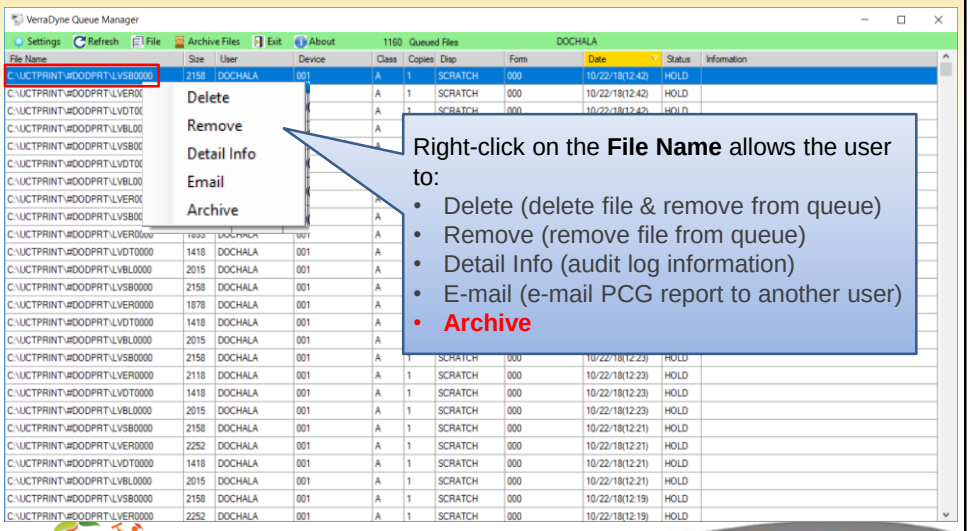
Upgrade of PCG Print Queue



Some of the features of the new VerraDyne Print Manager system:

- The archive files are located in **K:\UCTARCHIVE\#xxxPRT**

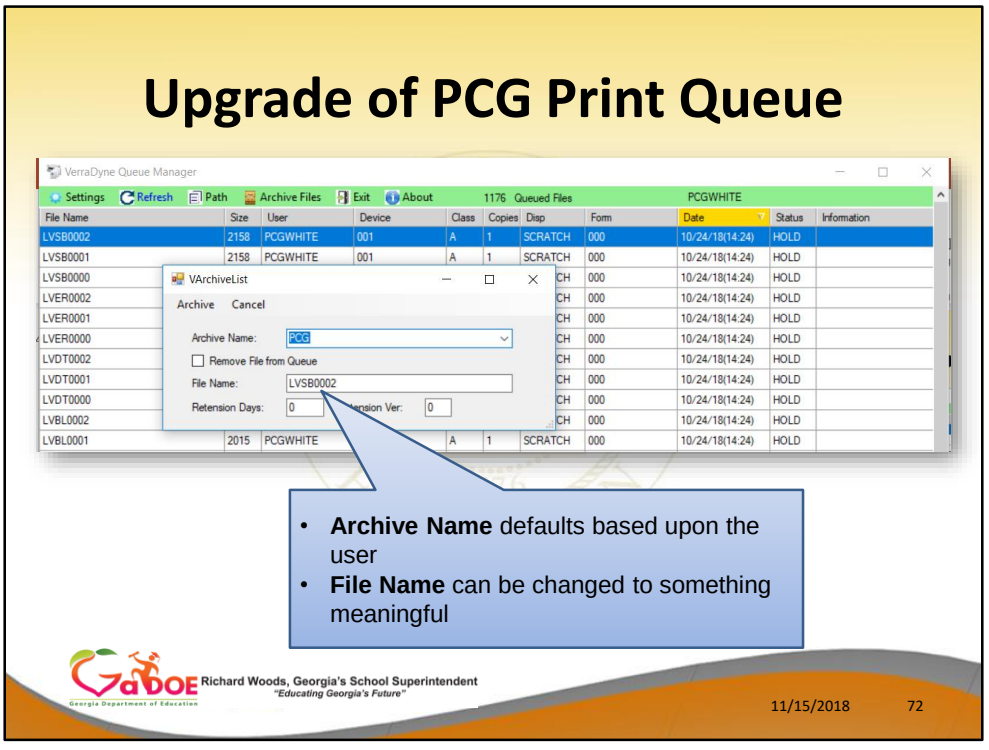
Upgrade of PCG Print Queue



This is the VerraDyne Print Manager system

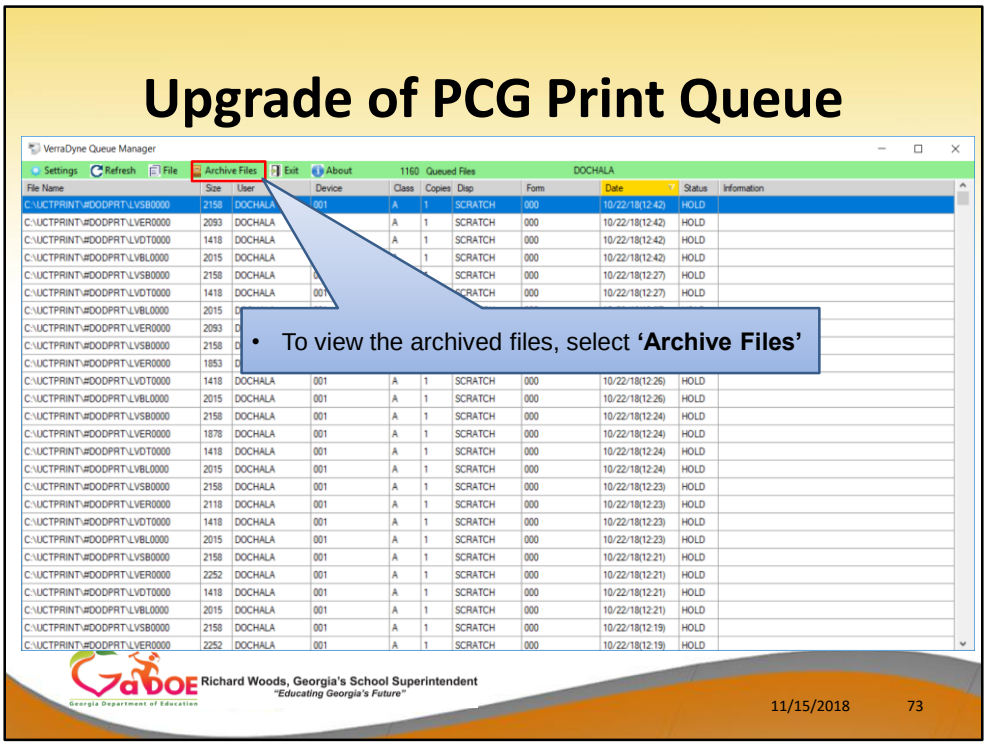
Right-click on the **File Name** allows the user to:

- **Archive**



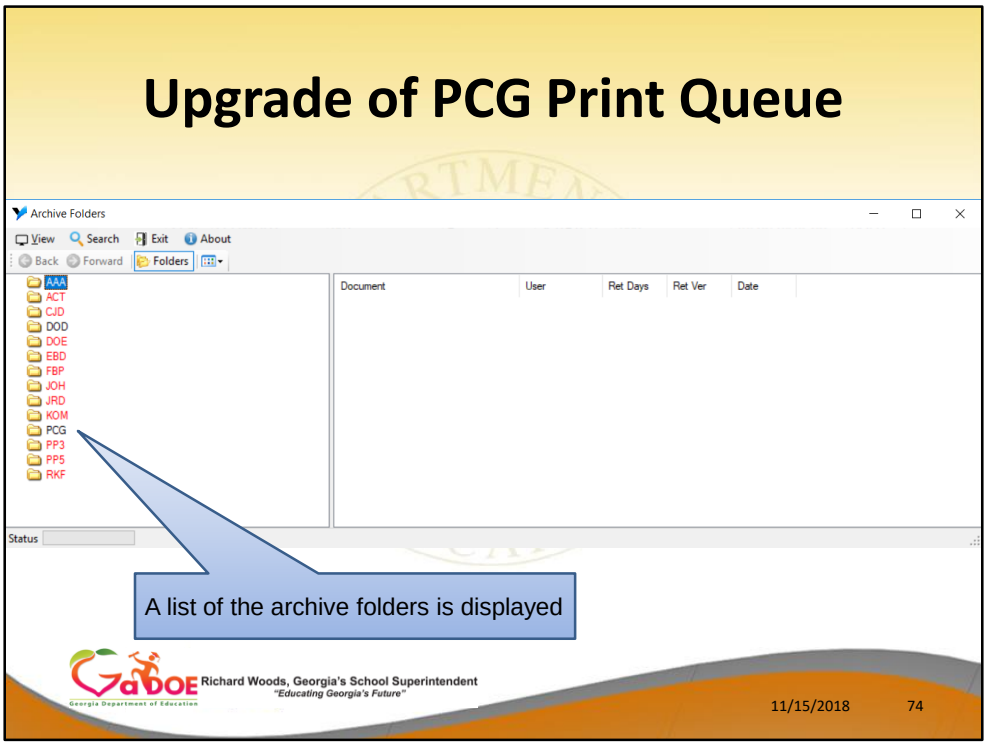
This is the VerraDyne Print Manager system

- **Archive Name** defaults based upon the user
- **File Name** can be changed to something meaningful

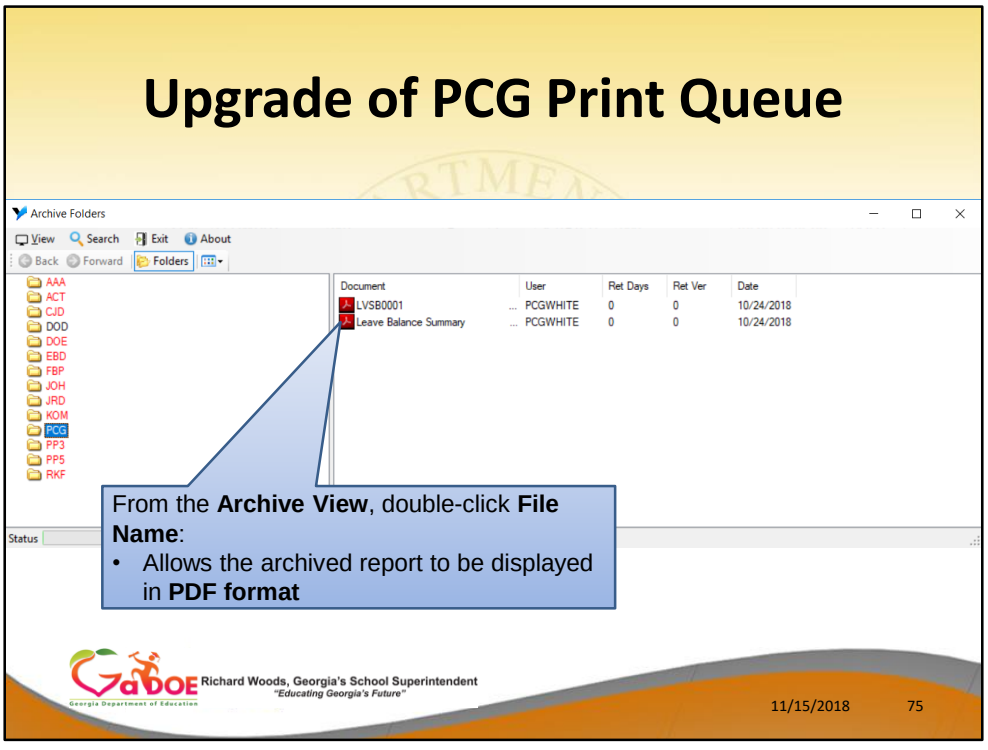


This is the VerraDyne Print Manager system

- To view the archived files, select **'Archive Files'**

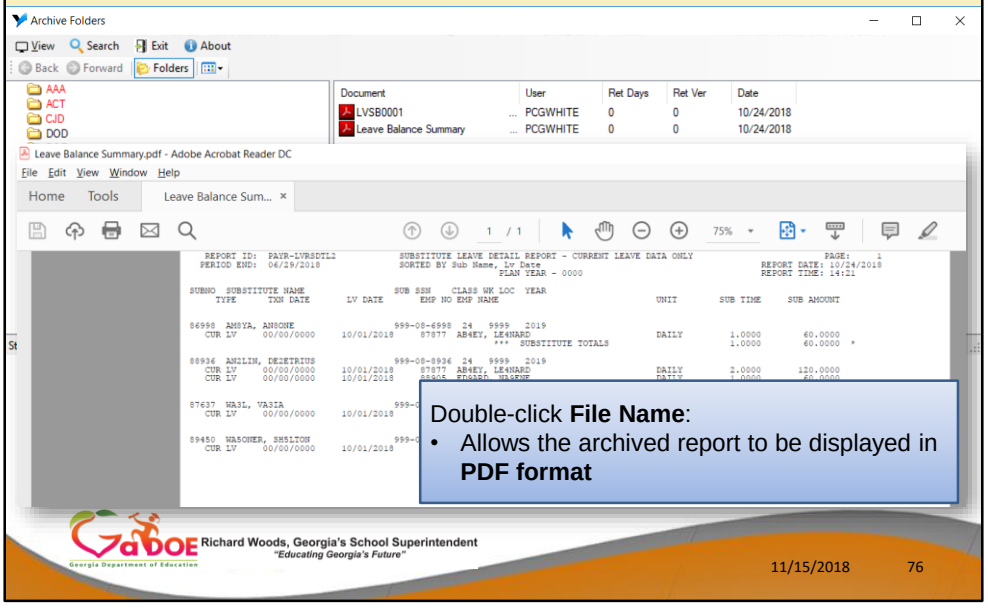


A list of the **archive folders** is displayed

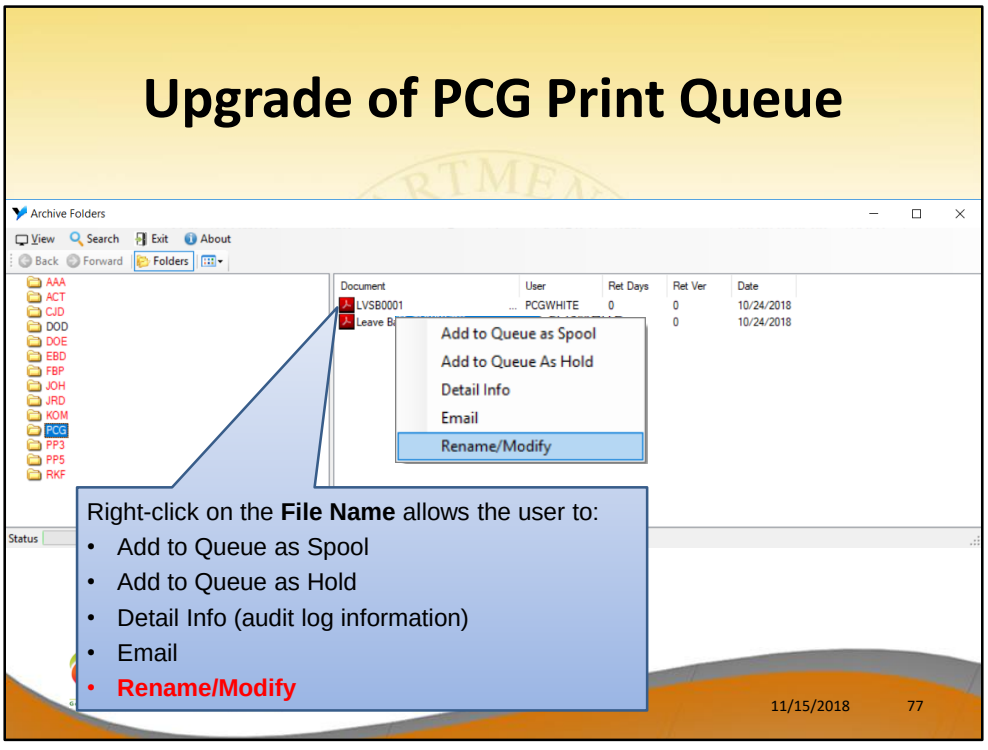


From the **Archive View**, double-click **File Name**: The archived report to be displayed in **PDF format**

Upgrade of PCG Print Queue



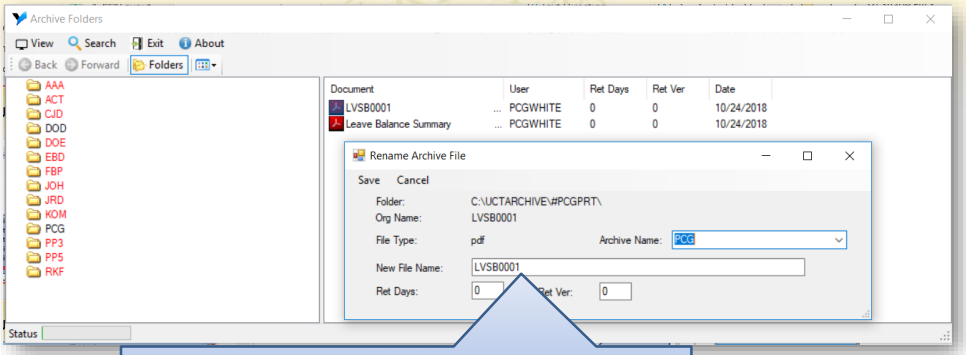
From the **Archive View**, double-click **File Name**: The archived report to be displayed in **PDF format**



Right-click on the **File Name** allows the user to:

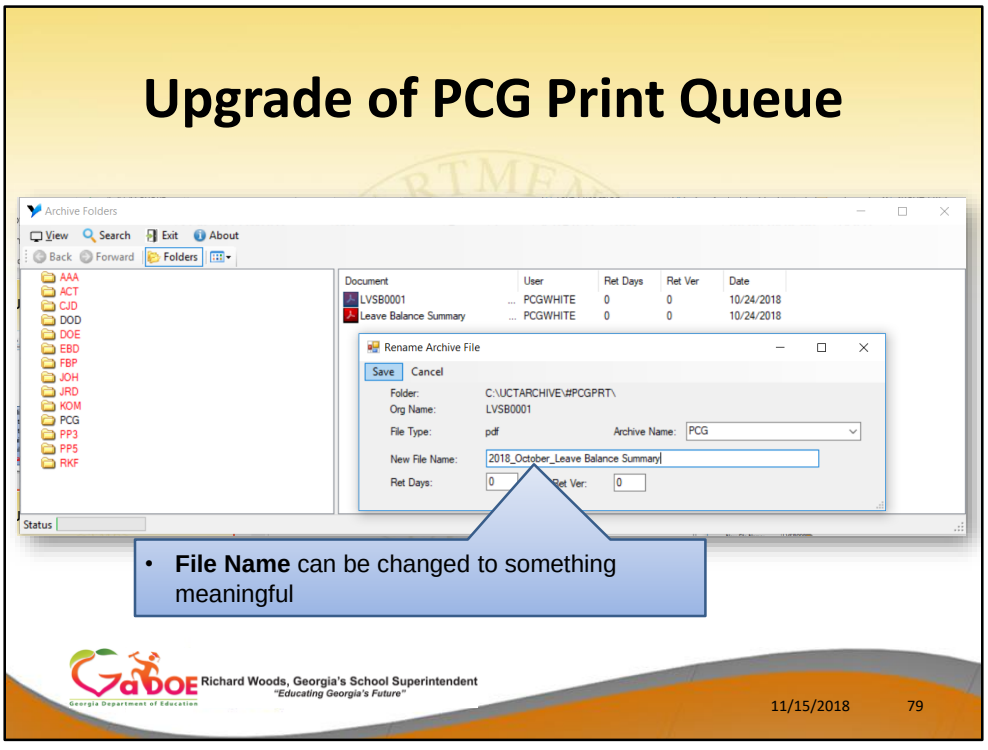
- **Add to Queue as Spool** – add the report back to the print queue in SPOOL mode
- **Add to Queue as Hold** – add the report back to the print queue in HOLD mode
- **Detail Info** (audit log information)
- **Email**
- **Rename/Modify**

Upgrade of PCG Print Queue



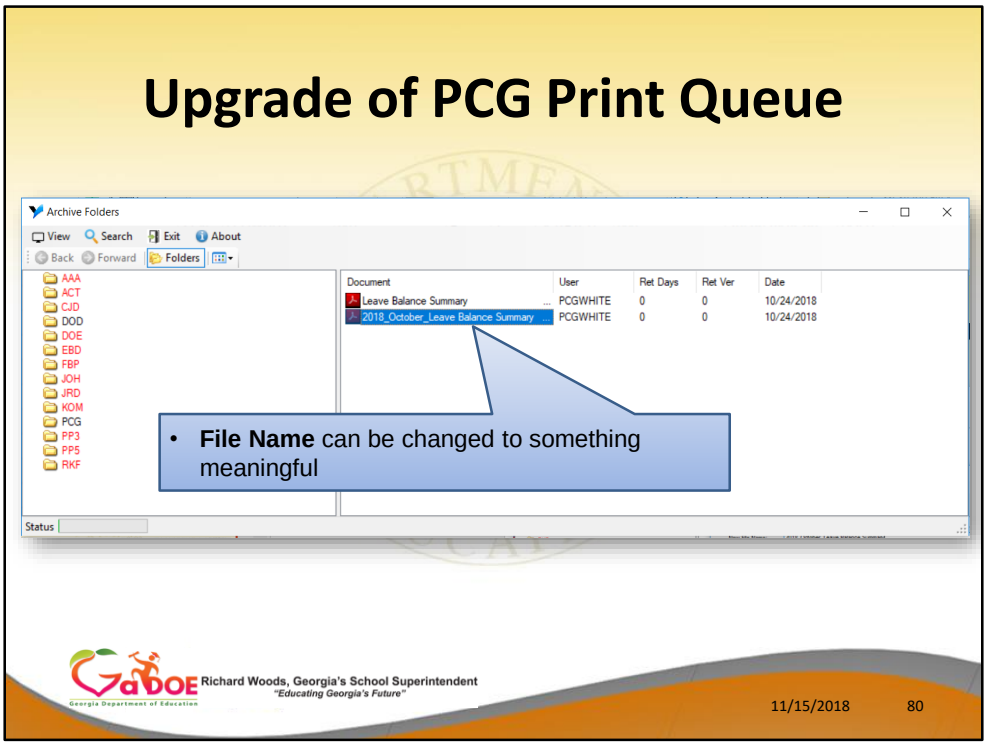
- **File Name** can be changed to something meaningful

The **Archive File Name** can be changed to something more meaningful



The **Archive File Name** can be changed to something more meaningful

- For example, this archive report name has been changed to '*2018_October_Leave_Balance_Summary*'.



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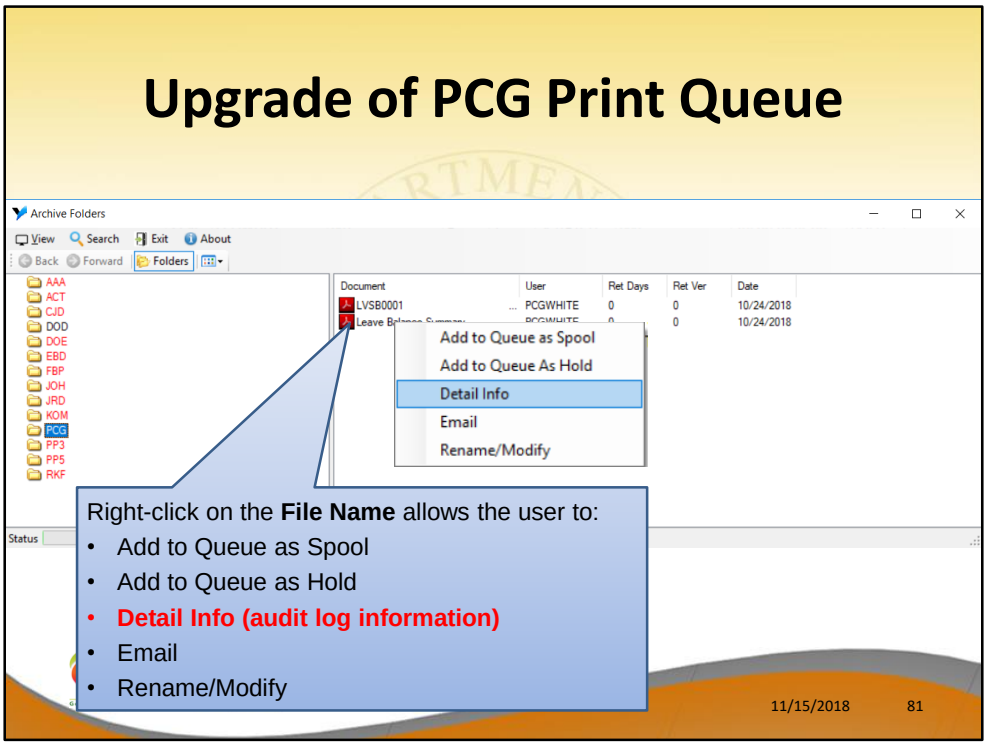

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- **Detail Info** (audit log information)
- Email
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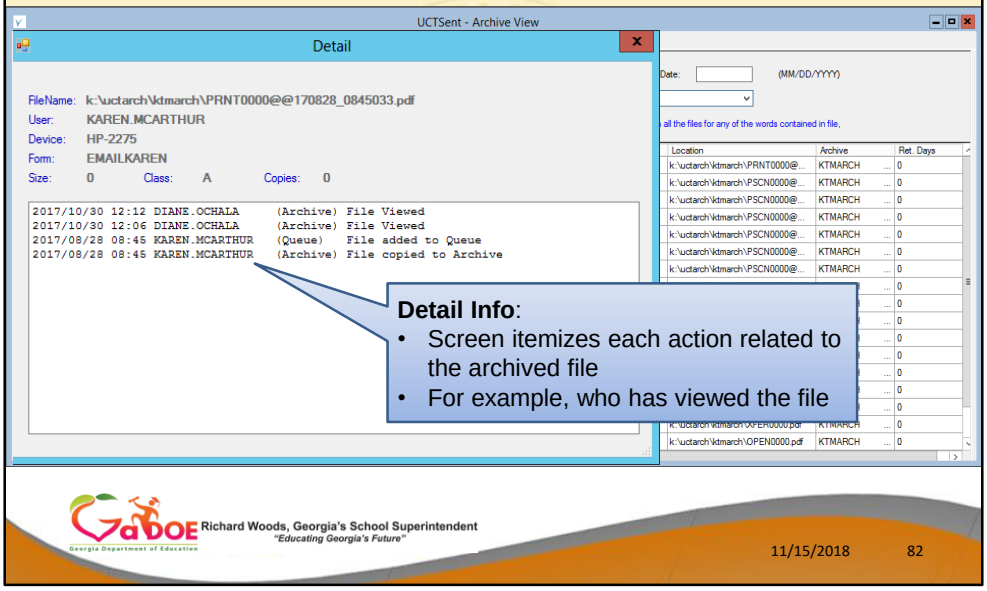
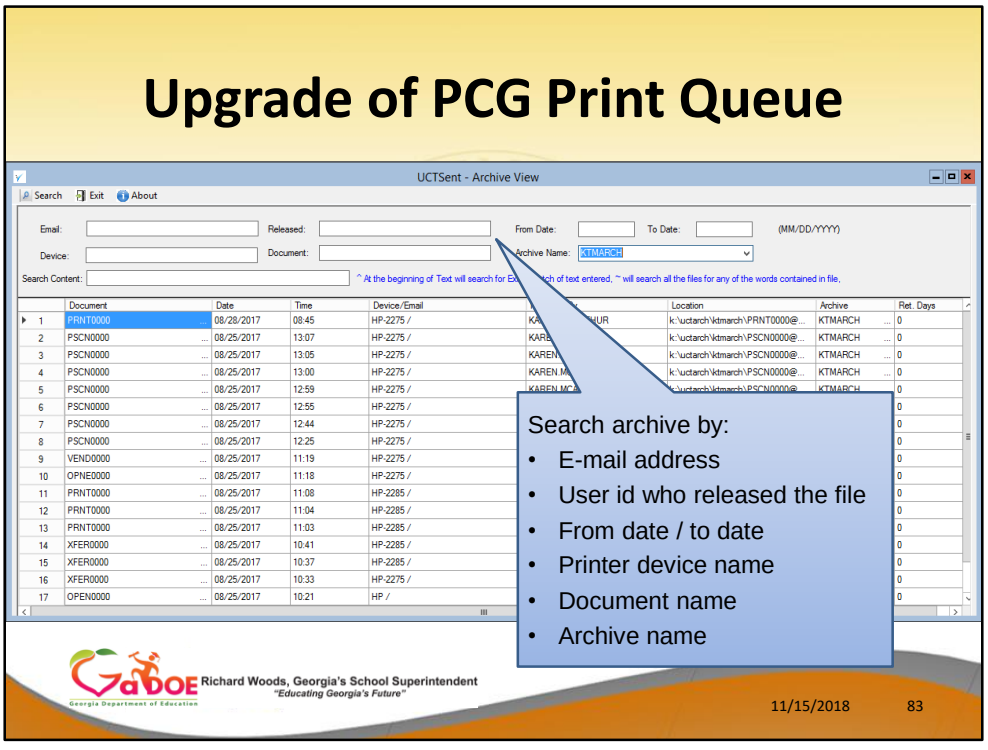
Upgrade of PCG Print Queue



This is Archive View

Detail Info:

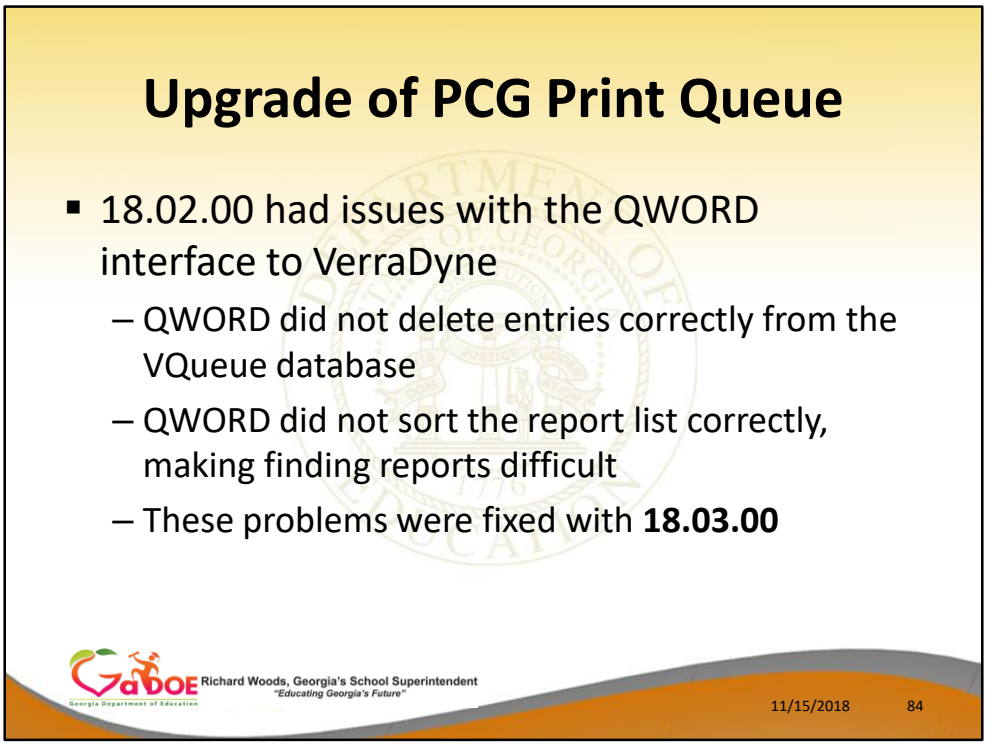
- The Detail Info displays a screen which itemizes each action related to the archived file
- For example, who has viewed the file in the archive



This is Archive View

You will be able to search the archive by:

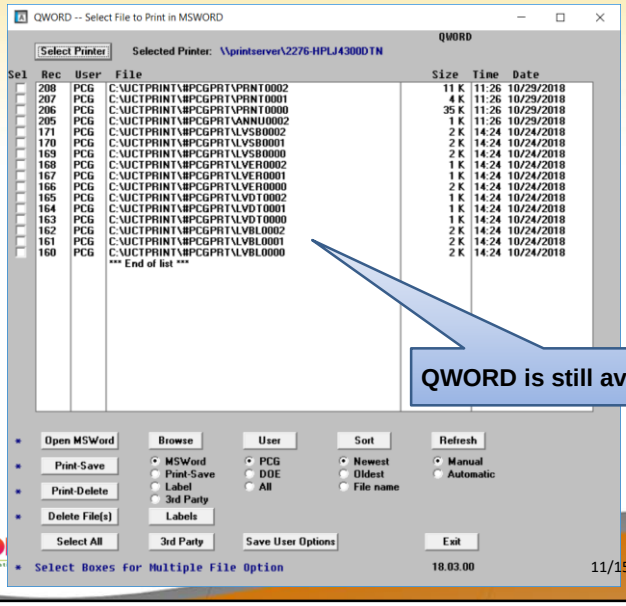
- E-mail address
- User id who released the file
- From date / to date
- Printer device name
- Document name
- Archive name



We did have issues with the QWORD interface to the VerraDyne print queue

- QWORD did not delete entries correctly from the VQueue database
  - This caused problems with print file names being duplicated in the WORD queue
- QWORD did not sort the report list correctly, making finding reports difficult
- These problems were fixed with **18.03.00**

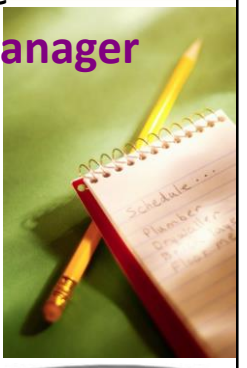
Upgrade of PCG Print Queue



QWORD is still available although we recommend using the **VerraDyne Print Queue Manager** instead.

Agenda

- Recent FAR Enhancements
- Recent Payroll Enhancements
- Upgrade of PCGenesis Print Queue
- **Demo of the VerraDyne Queue Manager**

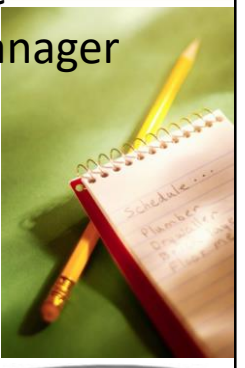


Demo of the VerraDyne Queue Manager

DEMO !!!

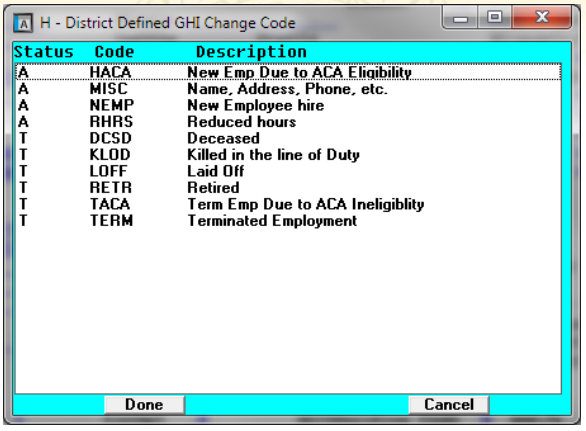
Agenda

- Recent FAR Enhancements
- Recent Payroll Enhancements
- Upgrade of PCGenesis Print Queue
- Demo of the VerraDyne Queue Manager
- **SHBP AUF Transmission File**
- User Input



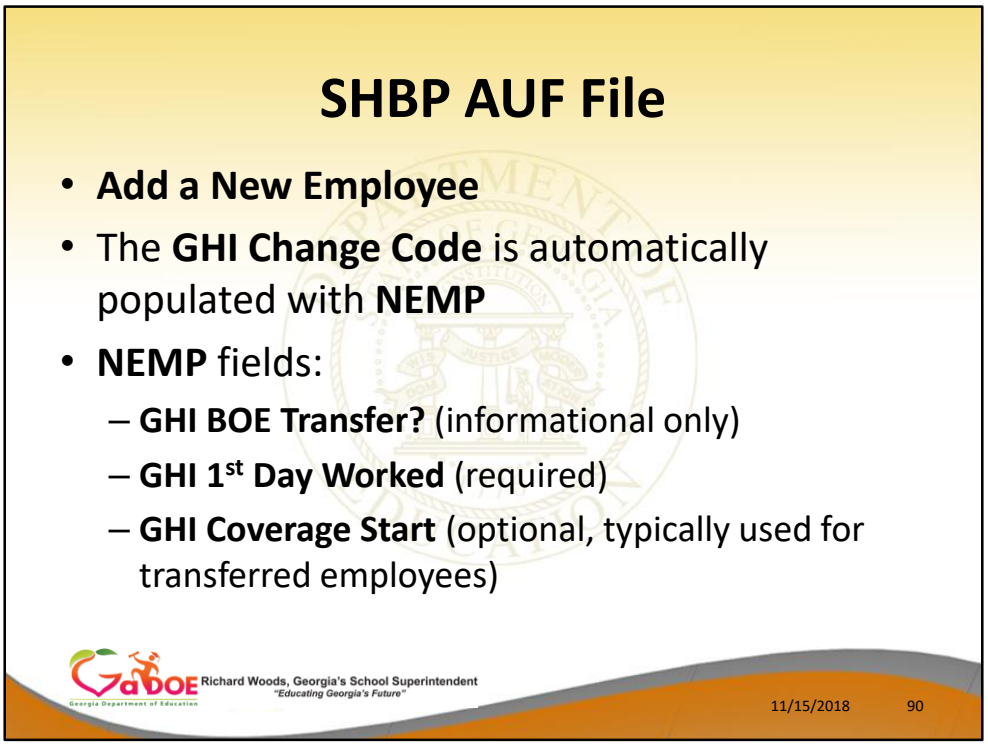
SHBP AUF File

- These are the SHBP AUF File accepted codes:



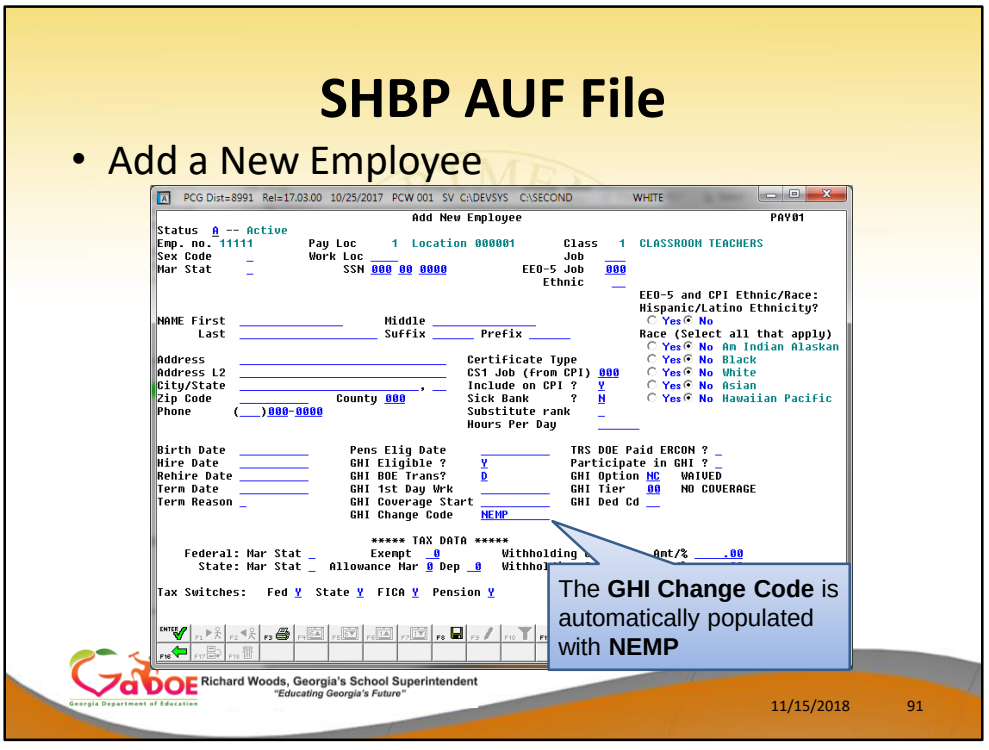
SHBP AUF File

- I want to talk about State Health reporting today. Steve, Angela and I were able to attend the 2nd annual BenPro conference held in Jekyll Island Georgia in August.
- Last year, SHBP rolled out numerous changes intended to address the very difficult situation of employees transferring between school districts so that the transfer of state health benefits is handled correctly.
- I would like to go over some of the changes made to PCG to address these changes.



SHBP AUF File – Add a New Employee

- First we will discuss what happens when a new employee is added in PCGenesis.
- On the *Add New Employee* screen, the **GHI Change Code** is automatically populated with **NEMP**, for a new employee hire
- For SHBP, the NEMP fields include:
  GHI BOE Transfer? (This is a new field in PCGenesis and is informational only)
  GHI 1st Day Worked (This is a required field and should represent the date the employee was hired by the school system)
  GHI Coverage Start (this field is optional and is typically used for transferred employees)



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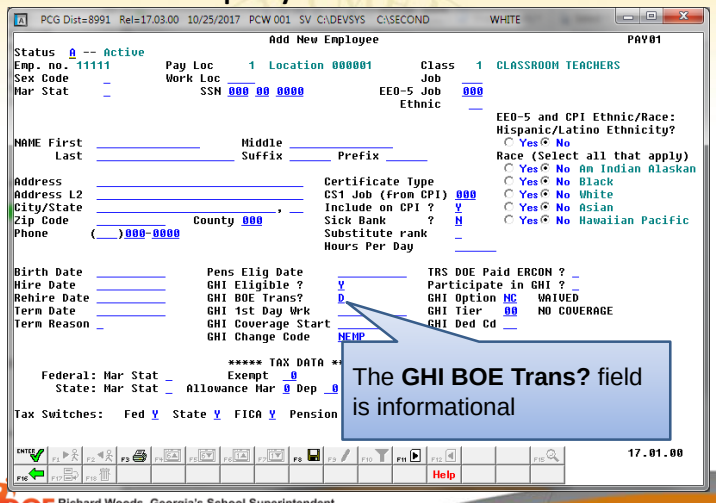
SHBP AUF File

- Add a New Employee

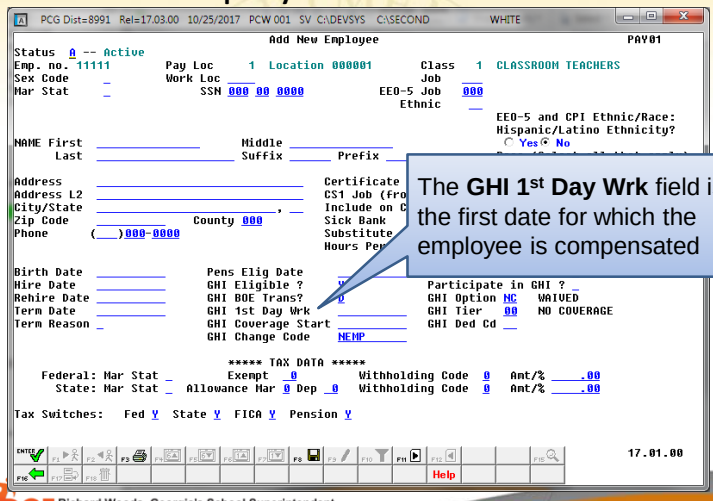


SHBP AUF File – Add a New Employee

- **GHI BOE Transfer?** (This is a new field in PCGenesis and is informational only)
- However, this data should be discovered from the employee so that SHBP benefits are transferred to the new school district correctly.
- Valid values are No = '**N**', Yes = '**Y**', and Don't know = '**D**'
- If the **GHI BOE Transfer** field is set to '**Y**', but a **GHI Coverage Start Date** has not been entered, a warning message will be displayed.
- This field is intended as a reminder that special processing may be required for the AUF file to be generated correctly.

SHBP AUF File

- Add a New Employee

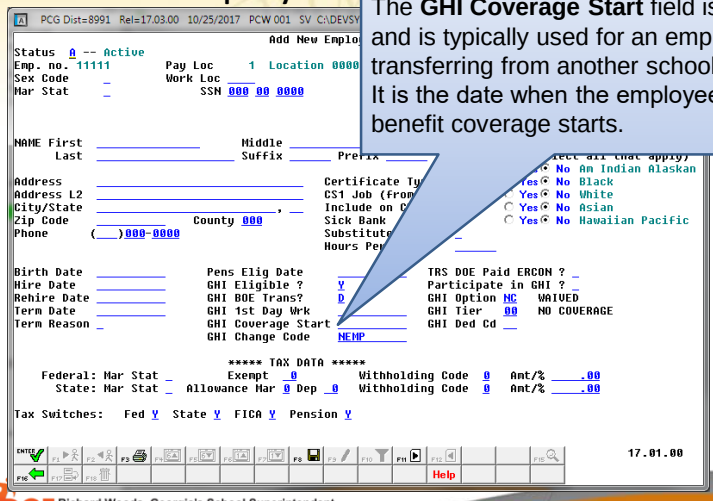


SHBP AUF File – Add a New Employee

GHI 1st Day Worked - This is a required field and should represent the date the employee was hired by the school system

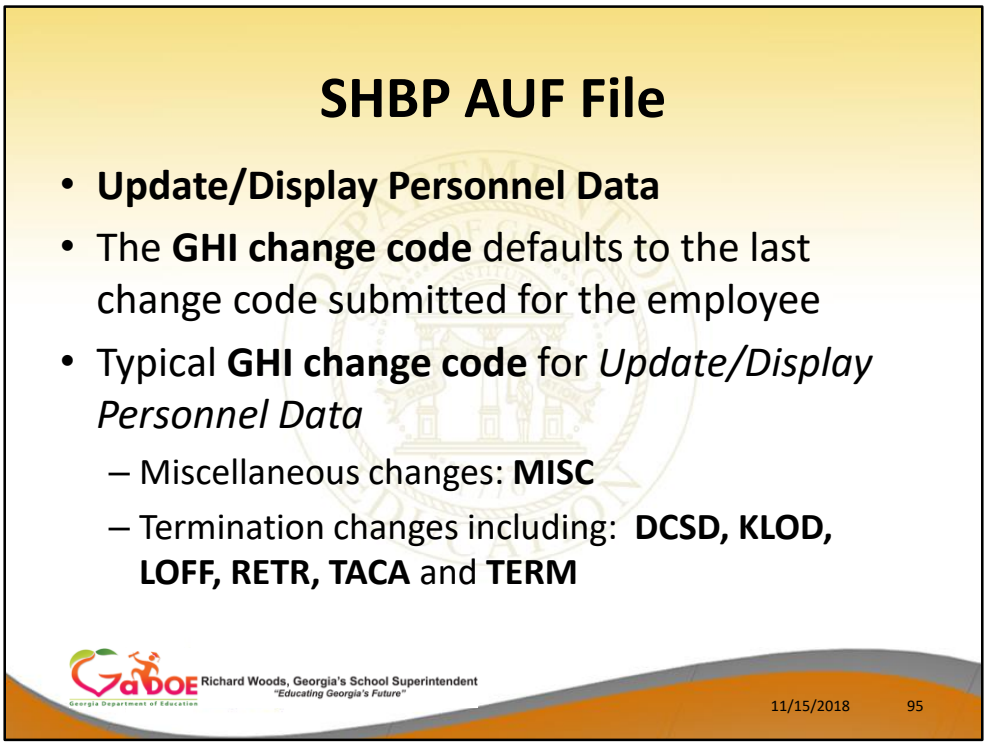
SHBP AUF File

- Add a New Employee



- Whether or not an employee is transferring from another district should be discovered from the employee so that SHBP benefits are transferred to the new school district correctly.
- The **GHI Coverage Start** field is an optional field on the *Add New Employee* screen. Per instructions from the Georgia State Health Agency, the **GHI Coverage Start** field should only be **used for summer transfers from May 1 through October 31**. During this timeframe, the date provided in this field will be used to replace the hire date when determining the benefit start date in the ADP system. According to the Georgia State Health Agency, the **BOE Coverage Start Date** field will allow payroll locations to start a transferring employee's coverage on the exact date selected by the BOE without the date rolling forward an additional month.

NOTE: If the **GHI BOE Transfer** field is set to '**Y**', but a **GHI Coverage Start Date** has not been entered, a warning message will be displayed.



SHBP AUF File – Update/Display Personnel Data Screen

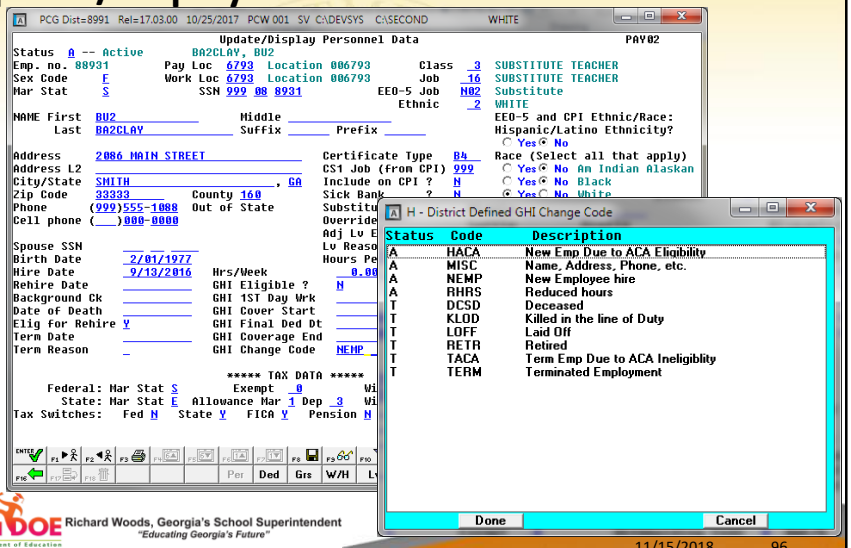
- The **GHI change code** defaults to the last change code submitted for the employee
- Typical **GHI change code** for *Update/Display Personnel Data*

  Miscellaneous changes: **MISC**

  Termination changes including: **DCSD, KLOD, LOFF, RETR, TACA** and **TERM**

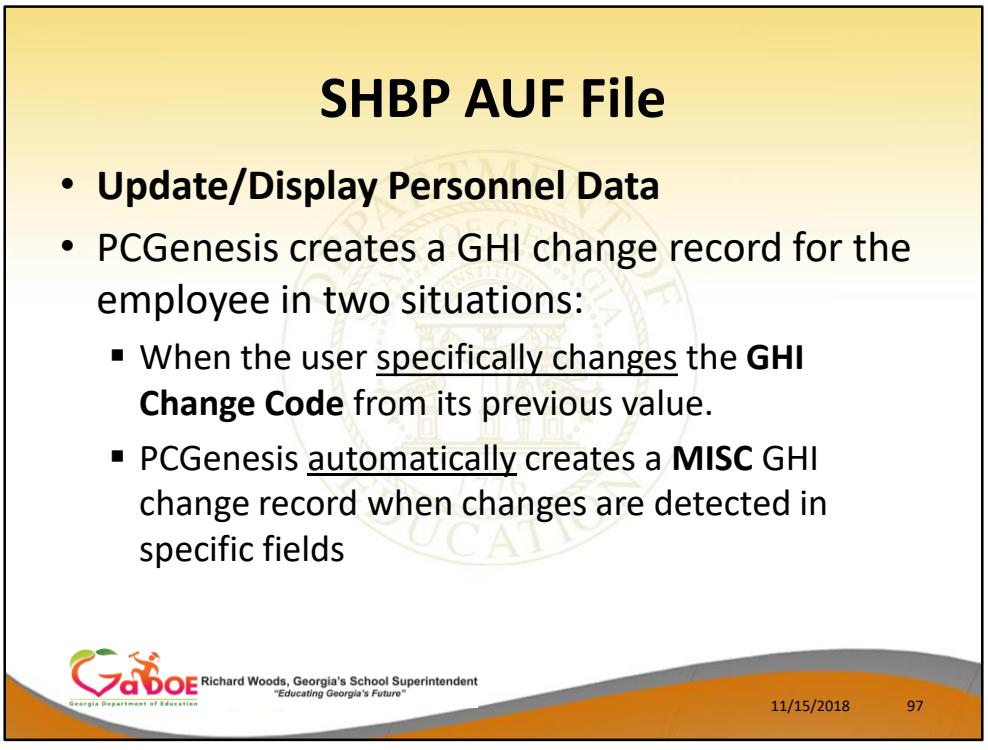
SHBP AUF File

- **Update/Display Personnel Data**



SHBP AUF File – Update/Display Personnel Data Screen

- This screen indicates the valid values for the **GHI Change Code**.
- These codes are determined by SHBP. PCG does not have a say in what codes are supported.
- The codes valid for active employees are HACA, MISC, NEMP, RHRS
- The codes valid for terminating employees are DCSD, KLOD, LOFF, RETR, TACA, and TERM

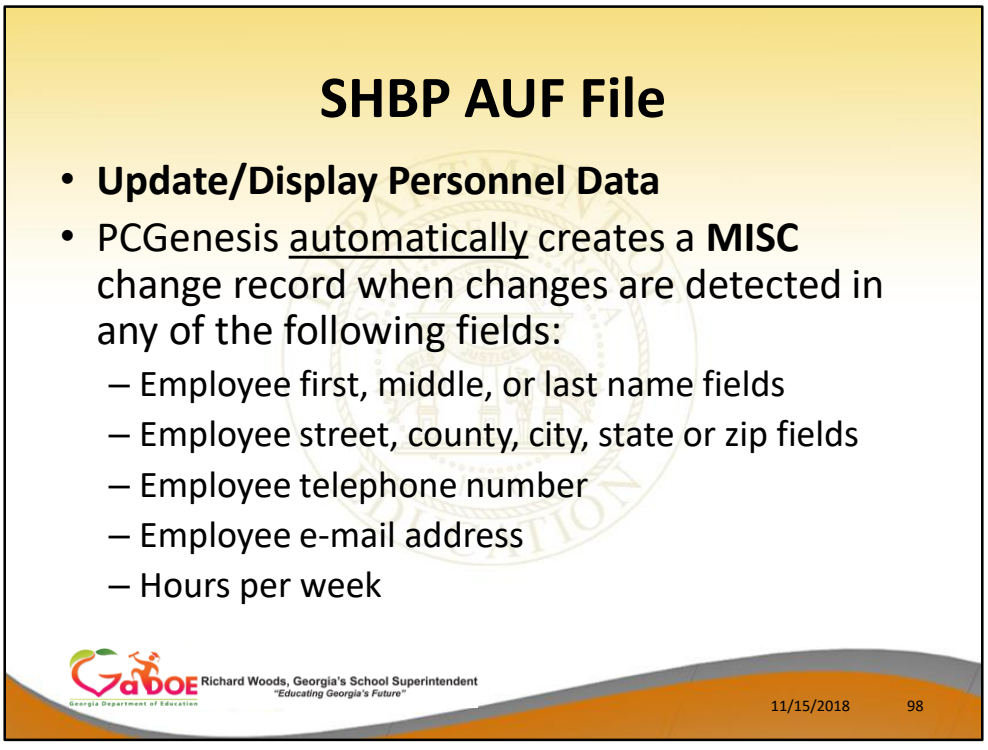


SHBP AUF File – Update/Display Personnel Data Screen

- The information on this slide is very important and identifies exactly how PCG generates change records for the AUF file!
- PCGenesis creates a GHI change record for the employee in two situations:

  When the user specifically changes the **GHI Change Code** from its previous value.

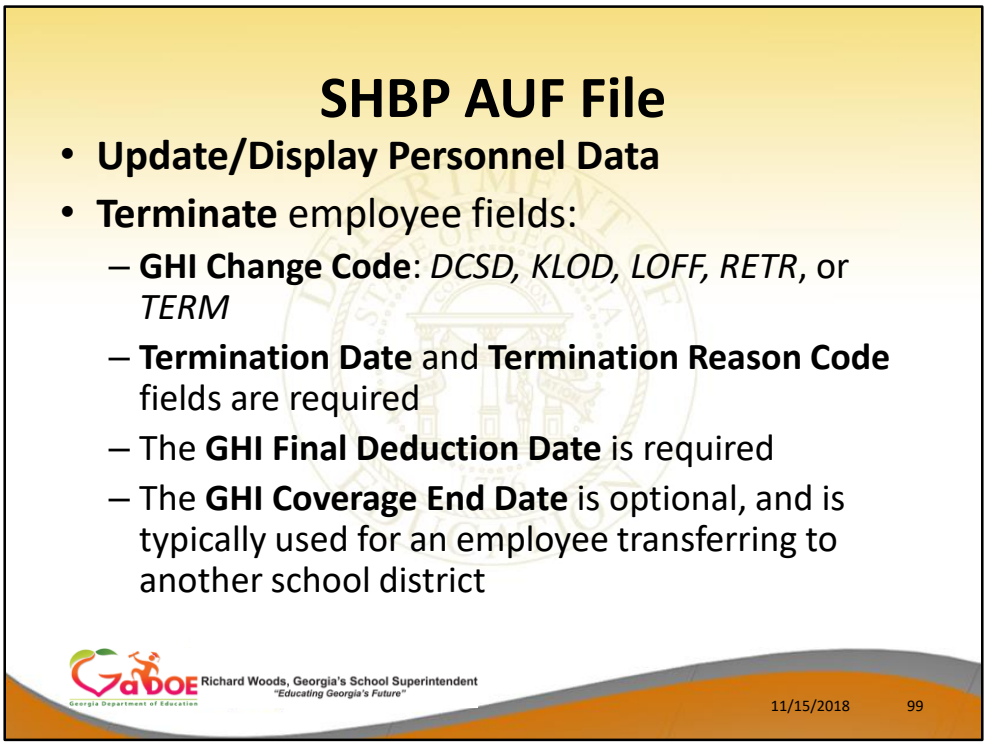
  PCGenesis automatically creates a **MISC** GHI change record when changes are detected in specific fields



SHBP AUF File – Update/Display Personnel Data Screen

PCGenesis automatically creates a **MISC** change record when changes are detected in any of the following fields:

Employee first, middle, or last name fields
Employee street, county, city, state or zip fields
Employee telephone number
Employee e-mail address
Hours per week



SHBP AUF File – Update/Display Personnel Data Screen

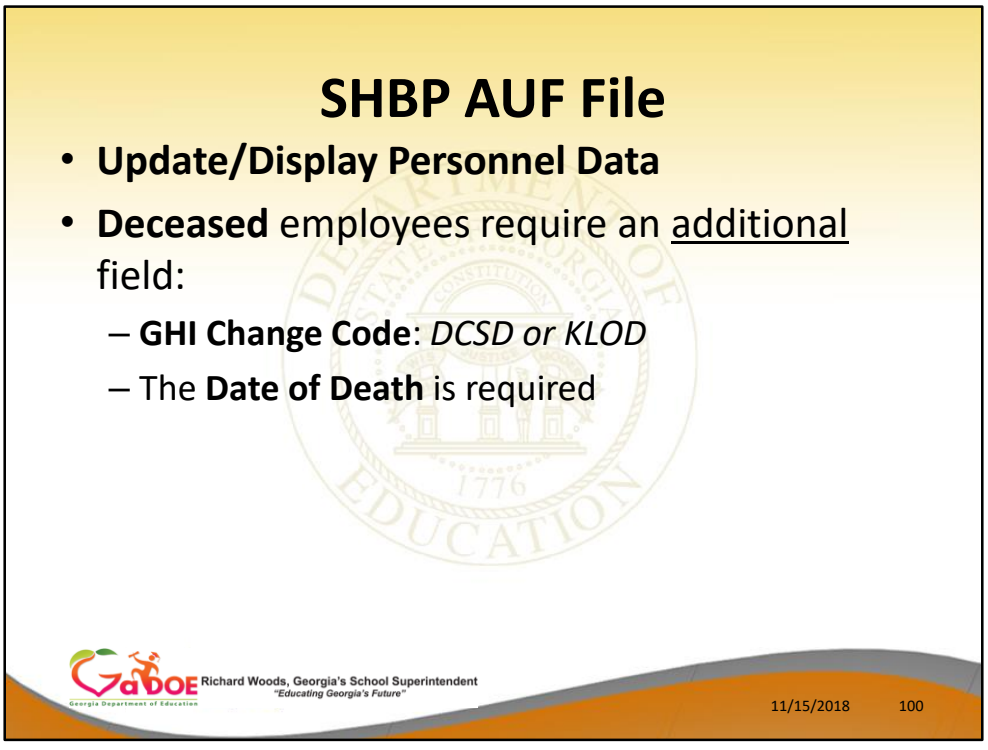
Terminate employee fields:

GHI Change Code: *DCSD, KLOD, LOFF, RETR*, or *TERM*

Termination Date and **Termination Reason Code** fields are required

The **GHI Final Deduction Date** is required

The **GHI Coverage End Date** is optional, and is typically used for an employee transferring to another school district

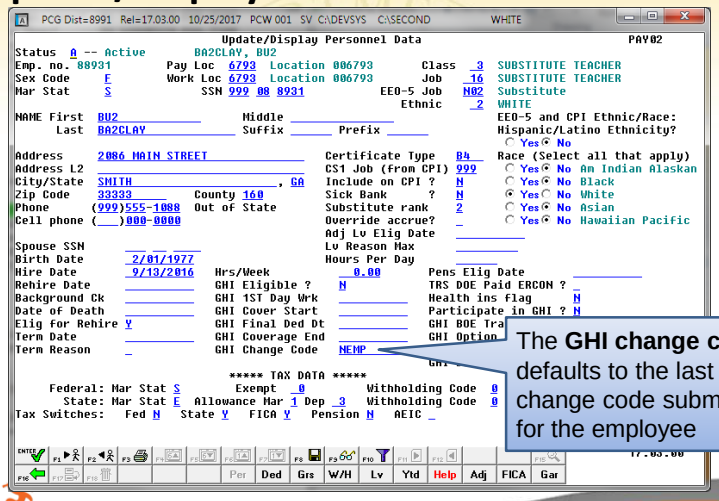


SHBP AUF File – Update/Display Personnel Data Screen

- When an employee is deceased, the Date of Death is also a required field

SHBP AUF File

- **Update/Display Personnel Data**

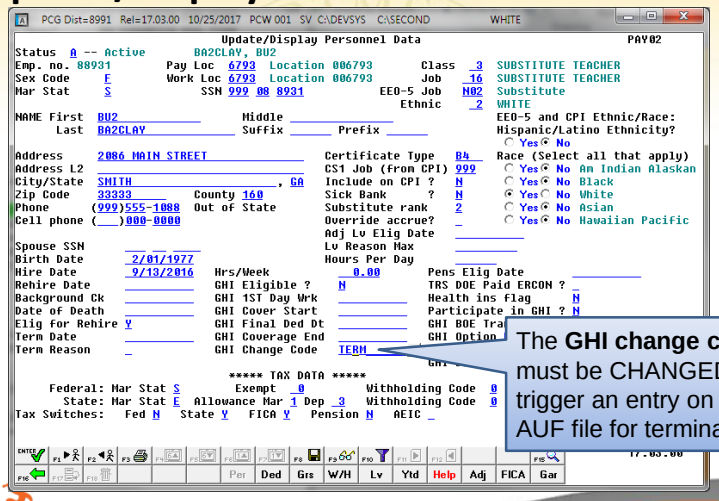


SHBP AUF File – Update/Display Personnel Data Screen

- The **GHI change code** defaults to the last change code submitted for the employee

SHBP AUF File

- **Update/Display Personnel Data**

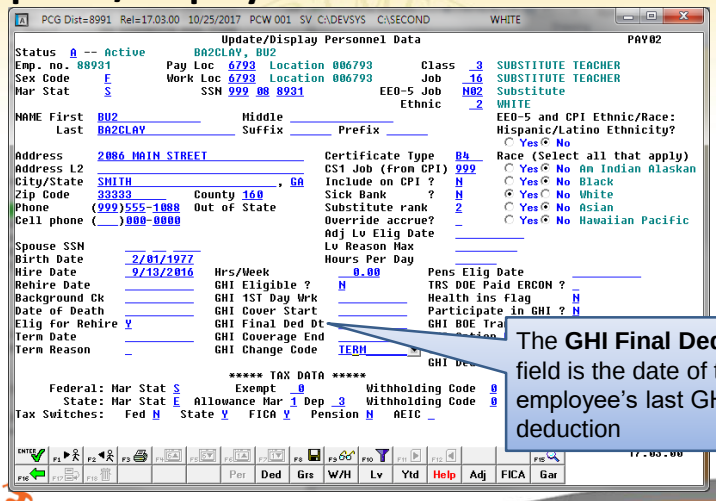


SHBP AUF File – Update/Display Personnel Data Screen

- The **GHI change code** must be CHANGED to trigger an entry on the AUF file for terminations

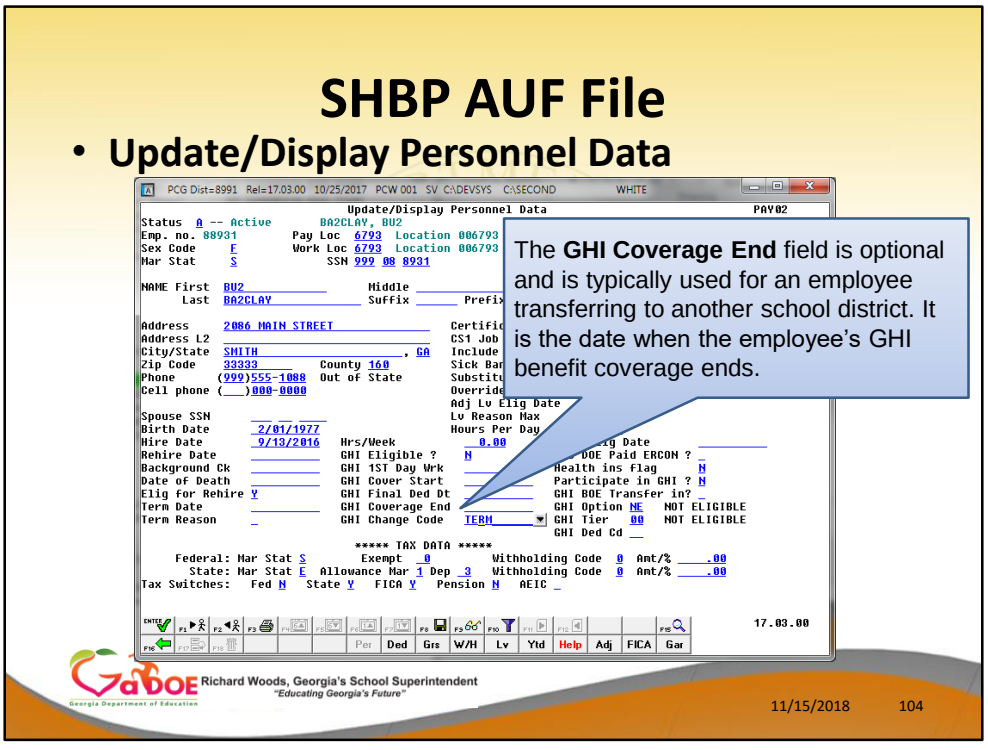
SHBP AUF File

- **Update/Display Personnel Data**



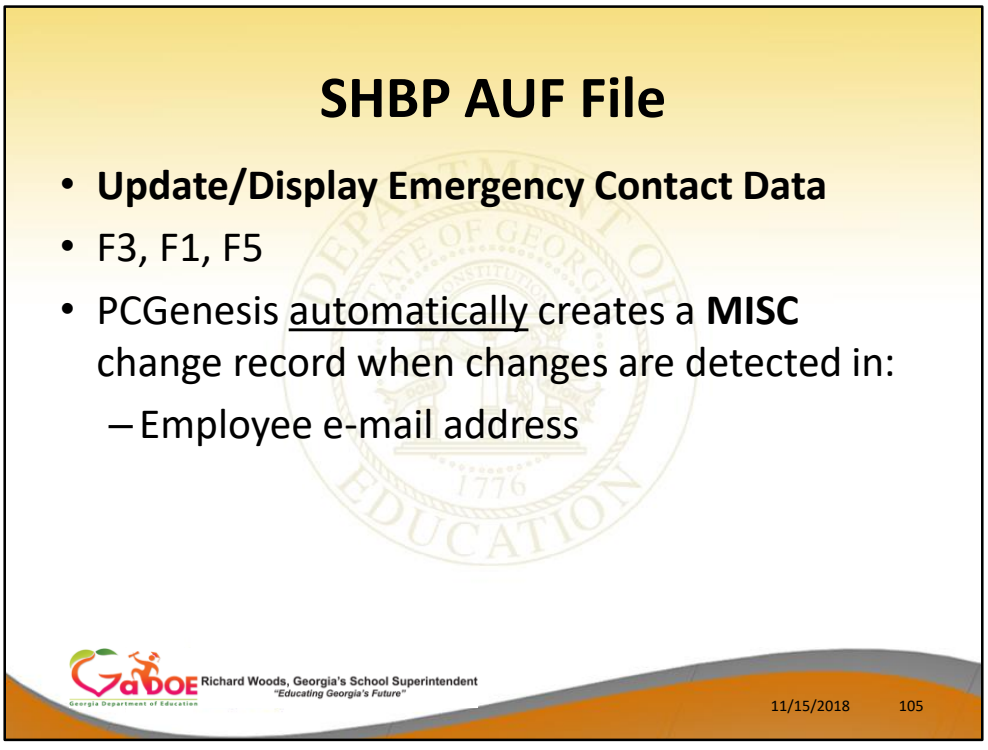
SHBP AUF File – Update/Display Personnel Data Screen

- The **GHI Final Deduction Date** field is the date of the employee's last GHI deduction



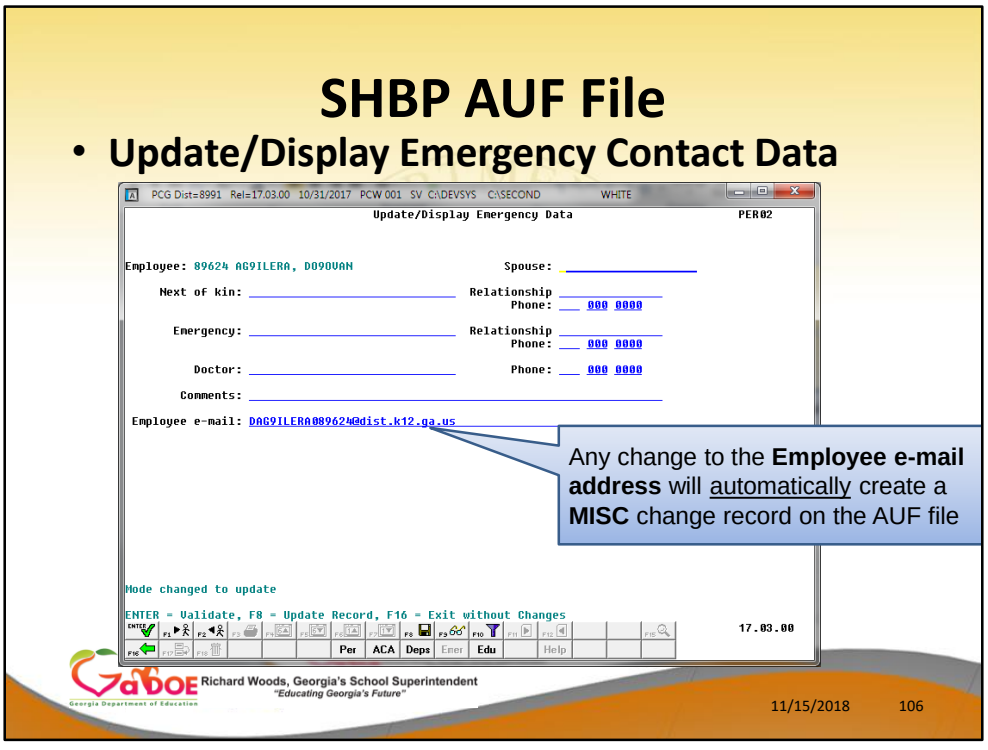
SHBP AUF File – Update/Display Personnel Data Screen

- The **GHI Coverage End** field is optional and is typically used for an employee transferring to another school district.
- The date provided in the **BOE Coverage End Date** field will allow payroll locations to end a transferring employee's coverage on the last day of the month selected by a BOE without the date rolling forward an additional month, regardless of the **Date of Last Deduction.**
- The date provided in this field will be used to replace the **Last Deduction Date** when determining the benefit end date in the ADP system.



SHBP AUF File – Update/Display Emergency Data Screen

- The *Update/Display Emergency Contact Data* screen contains the employee's e-mail address (F3, F1, F5)
- Any change to the **Employee e-mail address** will automatically create a **MISC** change record on the AUF file



SHBP AUF File – Update/Display Emergency Data Screen

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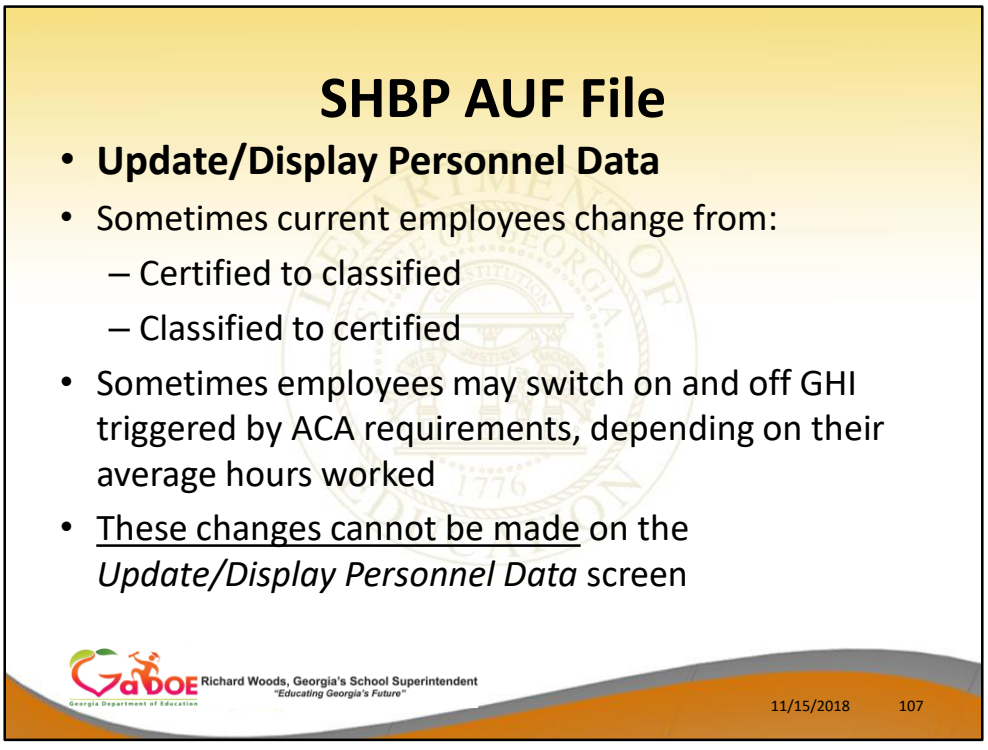


SHBP AUF File – Update/Display Personnel Data Screen

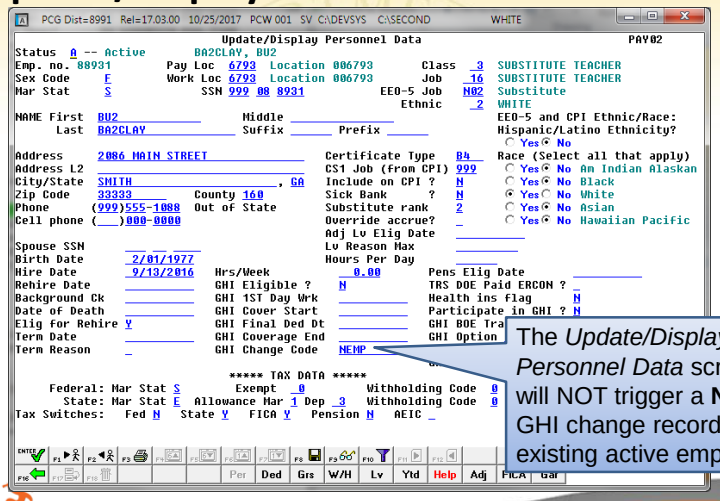
Sometimes current employees change from:

- Certified to classified
- Classified to certified
- Sometimes employees may switch on and off GHI triggered by ACA requirements, depending on their average hours worked

<u>These changes cannot be made</u> on the *Update/Display Personnel Data* screen

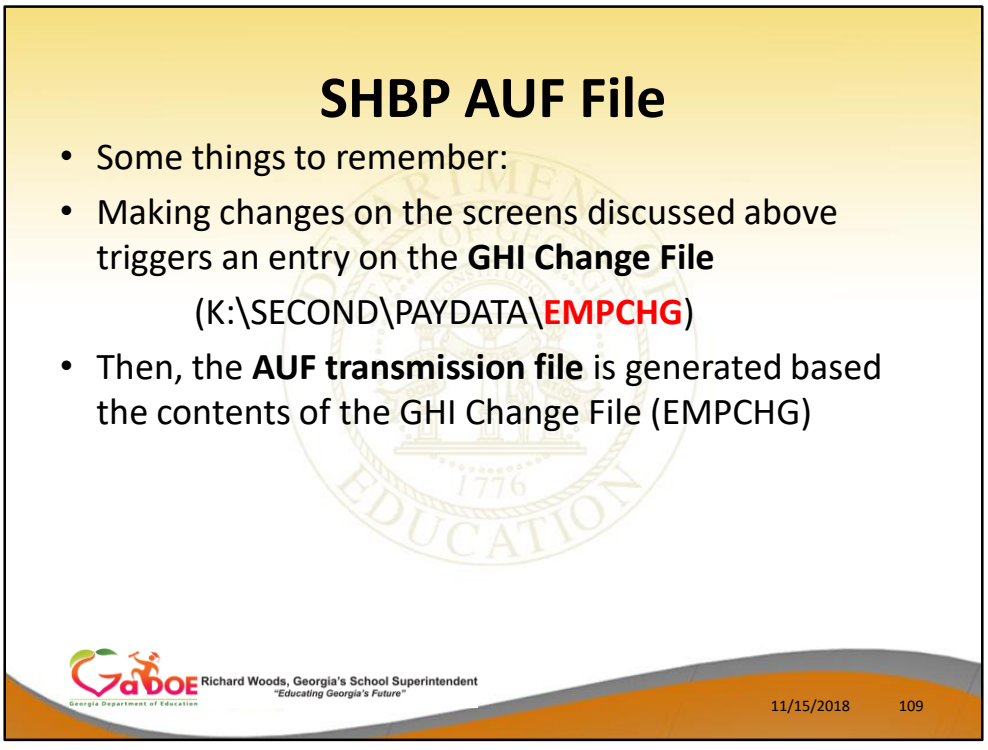
SHBP AUF File

- **Update/Display Personnel Data**



SHBP AUF File – Update/Display Personnel Data Screen

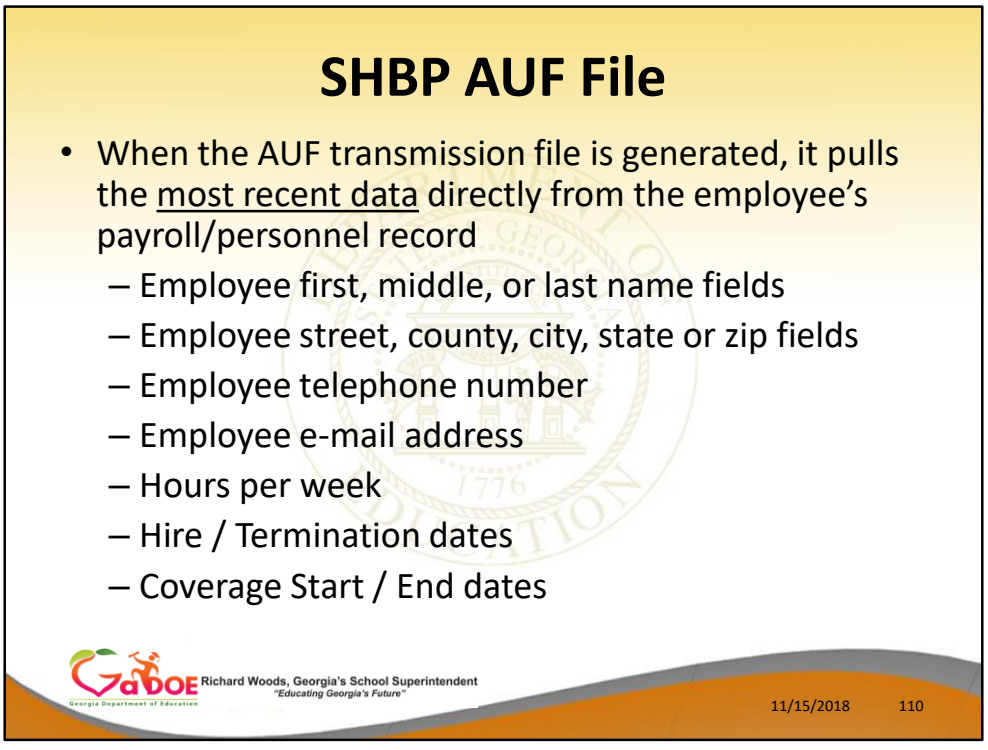
- When an active employee switches status or goes on/off ACA, these changes cannot be made on the *Update/Display Personnel Data* screen
- The *Update/Display Personnel Data* screen will NOT trigger a **NEMP** GHI change record for an existing active employee



SHBP AUF File – Update GHI Change File for State Health Benefits

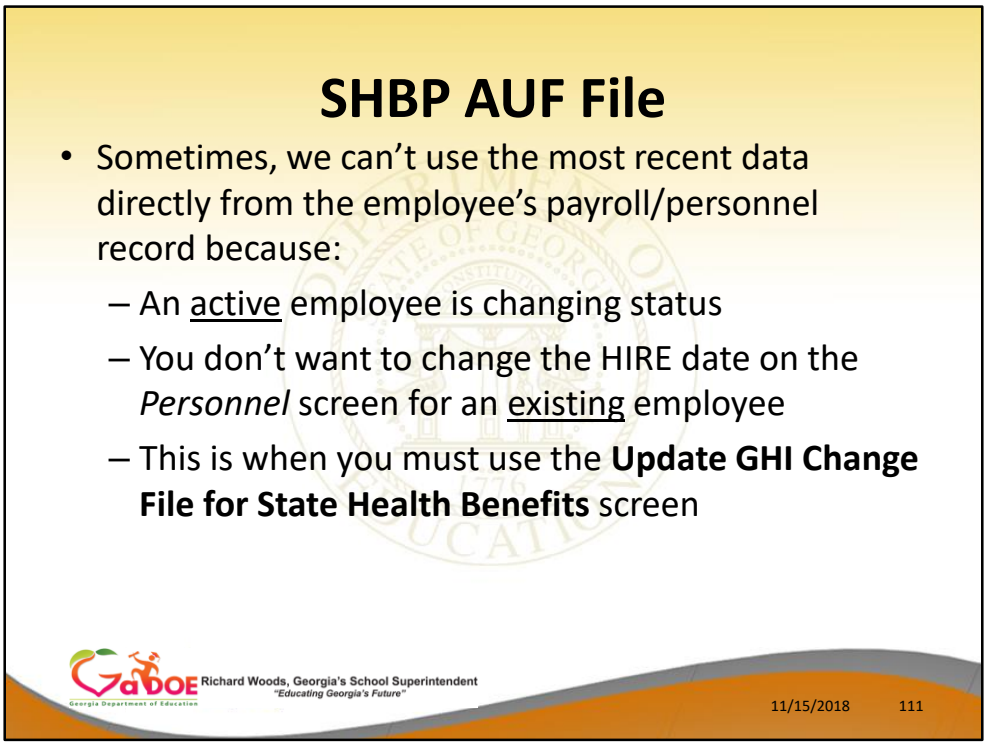
Some things to remember:

- Making changes on the screens discussed above triggers an entry on the **GHI Change File**
  (K:\SECOND\PAYDATA**EMPCHG**)
- Then, the **AUF transmission file** is generated based the contents of the GHI Change File (EMPCHG)



SHBP AUF File – Update GHI Change File for State Health Benefits

- When the AUF transmission file is generated, it pulls the most recent data directly from the employee's payroll/personnel record.
- This ensures that if multiple changes are made on the same day, PCG will send the most accurate and recent data to SHBP.
  - Employee first, middle, or last name fields
  - Employee street, county, city, state or zip fields
  - Employee telephone number
  - Employee e-mail address
  - Hours per week
  - Hire / Termination dates
  - Coverage Start / End dates



SHBP AUF File – Update GHI Change File for State Health Benefits

- Sometimes, we can't use the most recent data directly from the employee's payroll/personnel record because:

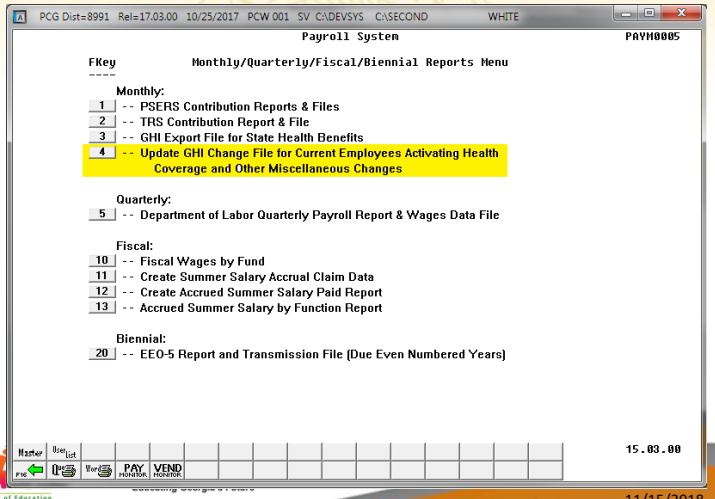
  An active employee is changing status

  You don't want to change the HIRE date on the *Personnel* screen for an existing employee

  This is when you must use the **Update GHI Change File for State Health Benefits** screen

SHBP AUF File

- **Update GHI Change File for State Health Benefits**



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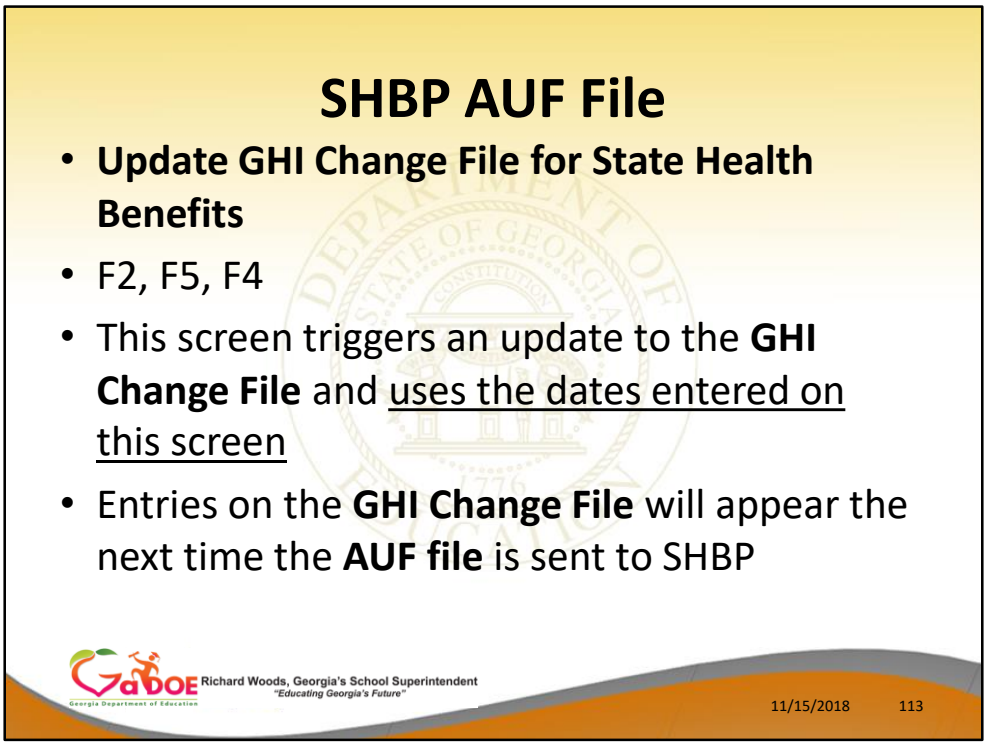
SHBP AUF File – Update/Display Personnel Data Screen

Update GHI Change File for State Health Benefits

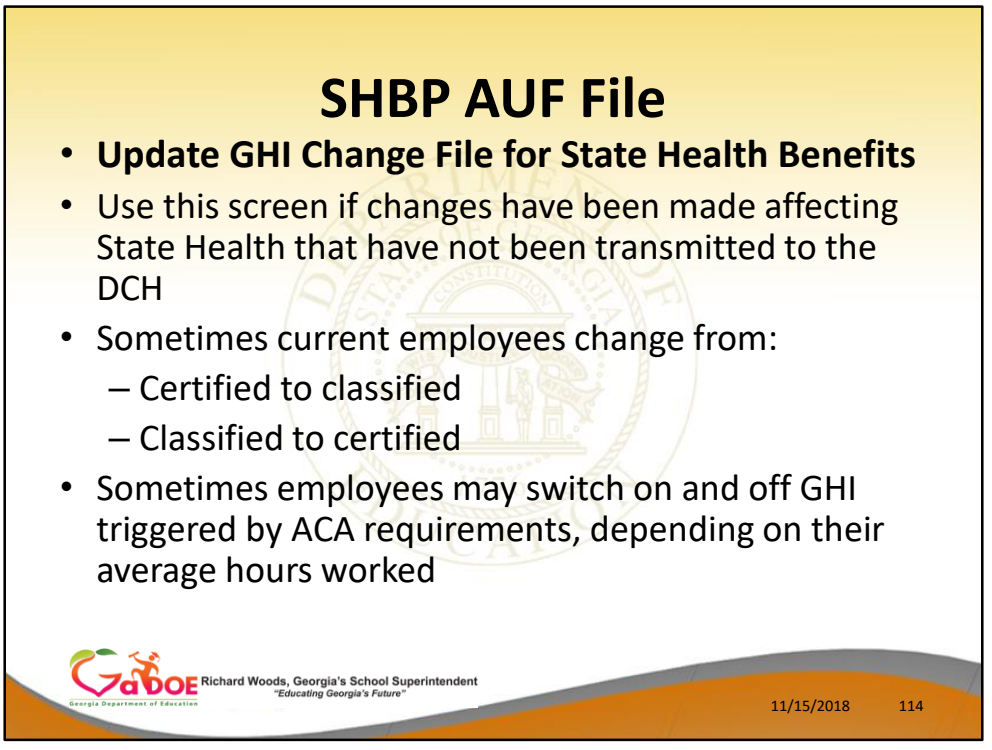
- F2, F5, F4
- In the next release (17.04.00), I am changing the name of this menu option, shown above, to hopefully clarify exactly what this option is used for



SHBP AUF File – Update GHI Change File for State Health Benefits

Update GHI Change File for State Health Benefits

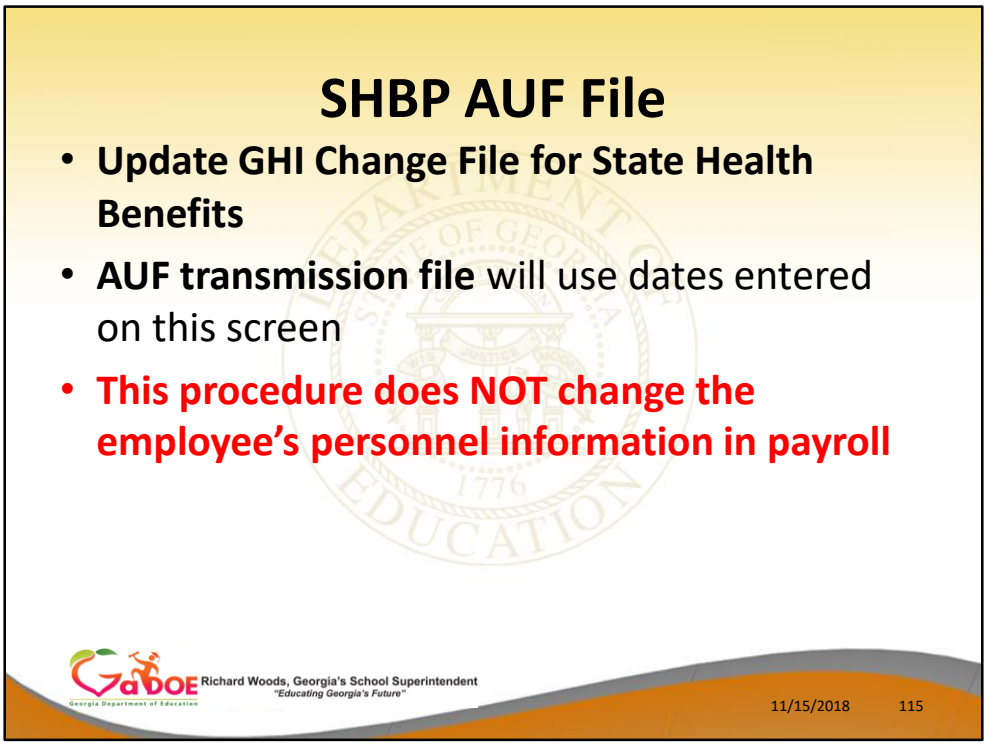
- F2, F5, F4
- This screen triggers an update to the **GHI Change File** and uses the dates entered on this screen.
- Entries on the **GHI Change File** will appear the next time the **AUF transmission file** is sent to SHBP



SHBP AUF File – Update GHI Change File for State Health Benefits

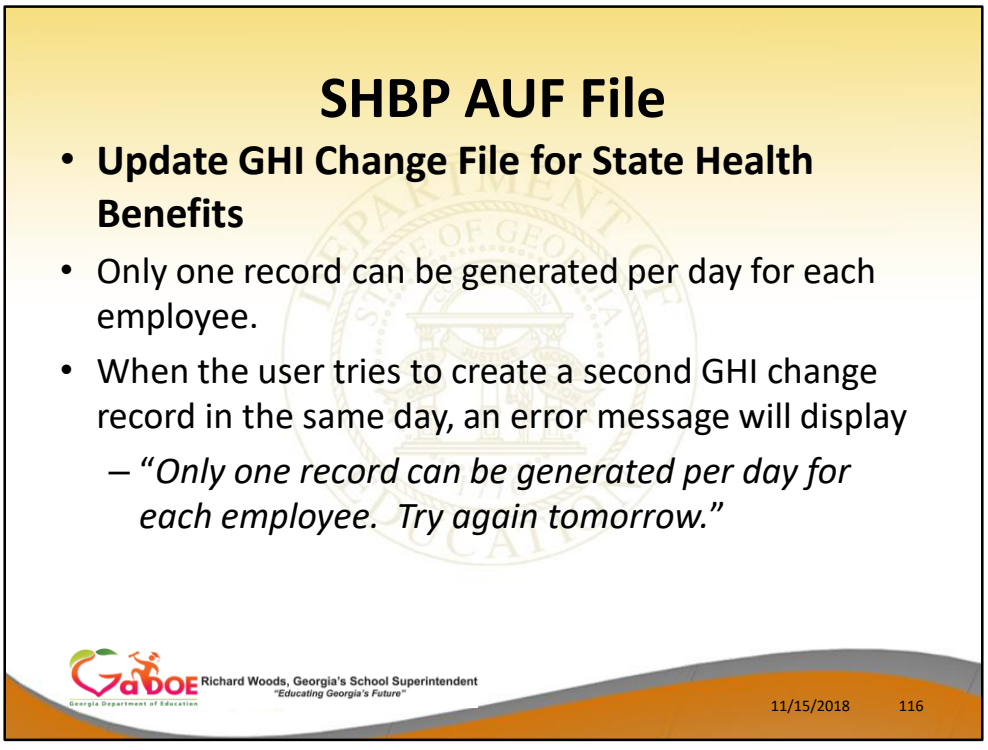
Use this screen if changes have been made affecting State Health that have not been transmitted to the DCH

- Sometimes current employees change from:
  - Certified to classified
  - Classified to certified
- Sometimes employees may switch on and off GHI triggered by ACA requirements, depending on their average hours worked



SHBP AUF File – Update GHI Change File for State Health Benefits

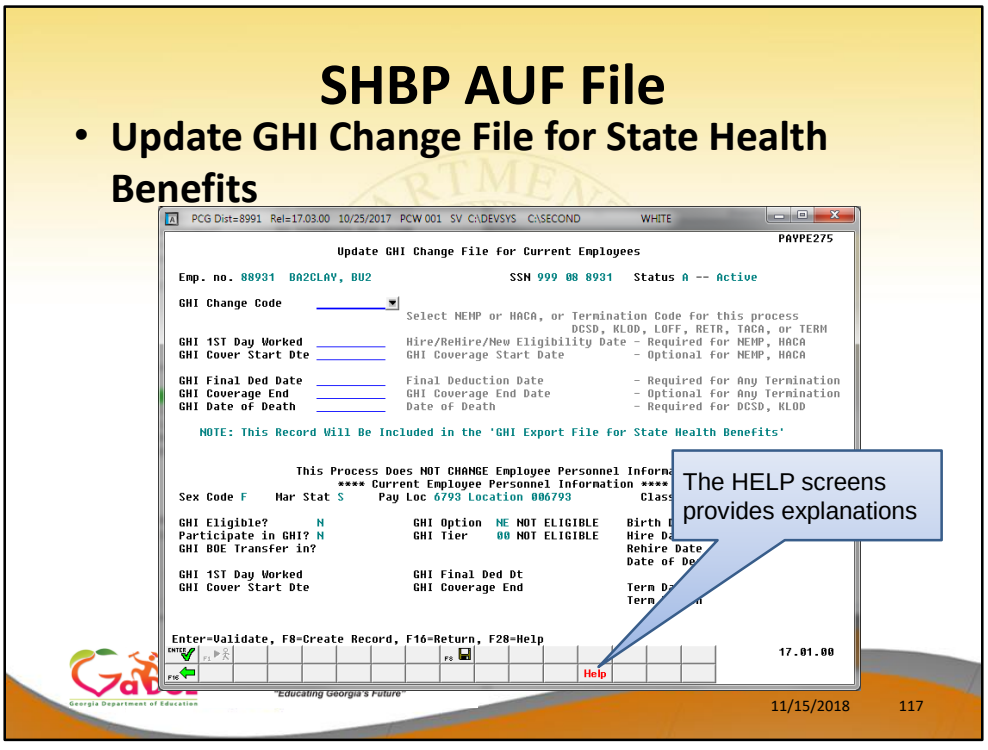
- **This procedure does NOT change the employee's personnel information in payroll.**
- The only purpose is to generate an entry on the GHI Change File, not to change any data on the *Update/Display Personnel Data* screen.



SHBP AUF File – Update GHI Change File for State Health Benefits

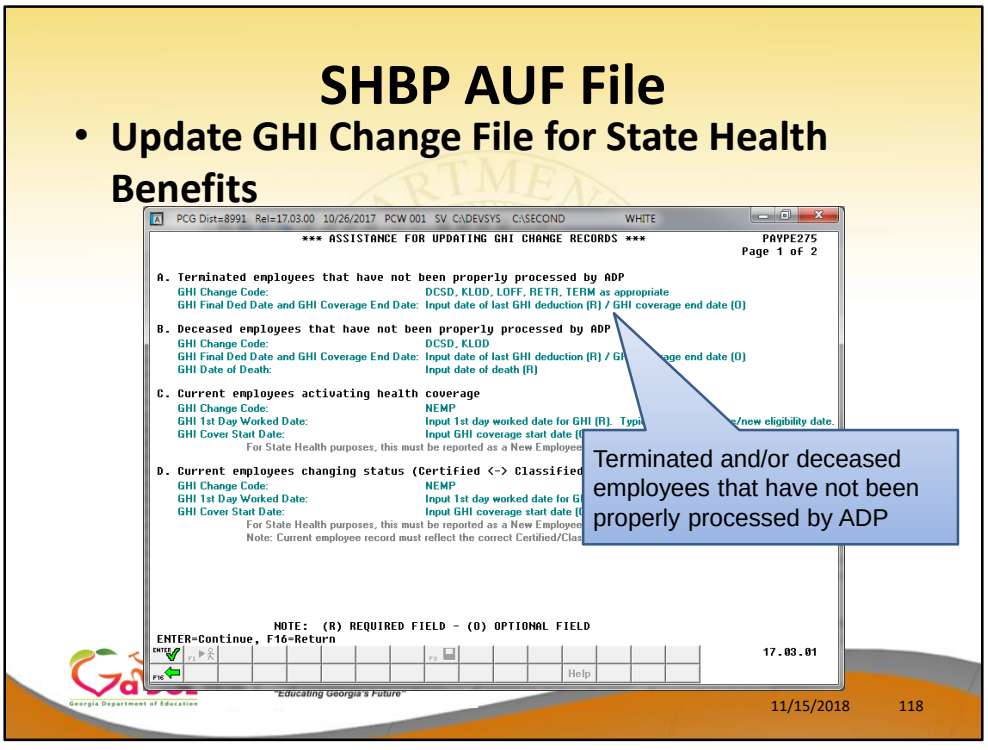
- Only one record can be generated per day for each employee.
- When the user tries to create a second GHI change record in the same day, an error message will display

  "Only one record can be generated per day for each employee. Try again tomorrow."
- **This is really true across the board from any PCG screen. SHBP will only handle ONE employee change record per day.**



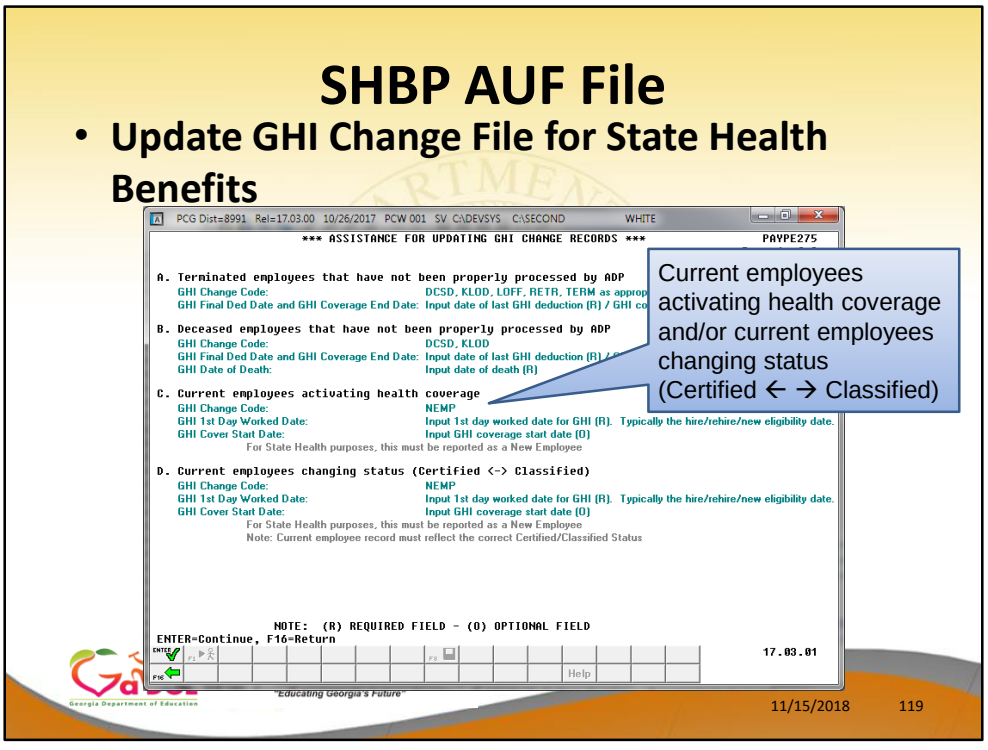
SHBP AUF File – Update GHI Change File for State Health Benefits

- On the *Update GHI Change File for Current Employees* screen, I think you will find the **HELP** screen very informative
- The **HELP** screens tell exactly what this screen should be used for.



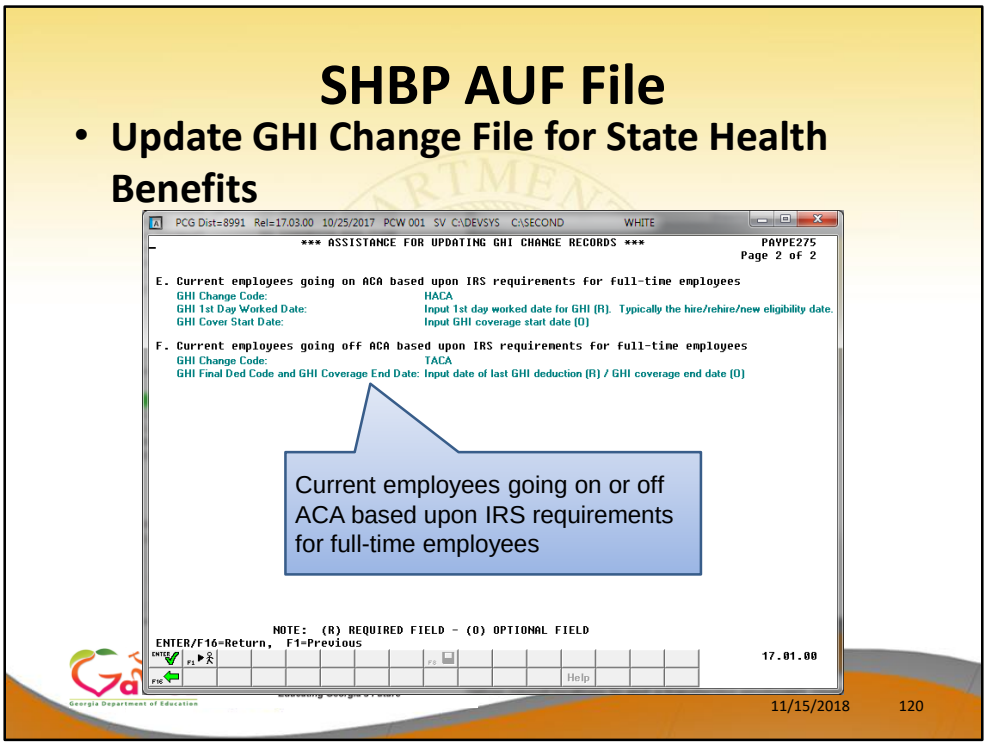
SHBP AUF File – Update GHI Change File for State Health Benefits

- The **HELP** screens tell exactly what this screen should be used for.
- This screen is used when terminated employees have not been properly processed by ADP
- The help screen tells you exactly what fields are required for the selected **Change Code** entered



SHBP AUF File – Update GHI Change File for State Health Benefits

- The **HELP** screens tell exactly what this screen should be used for.
- This screen is used for current employees activating health coverage
- This screen is used for current employees who are changing status. For example, an active employee who is changing from certified to classified or visa versa.
- The help screen tells you exactly what fields are required for the selected **Change Code** entered

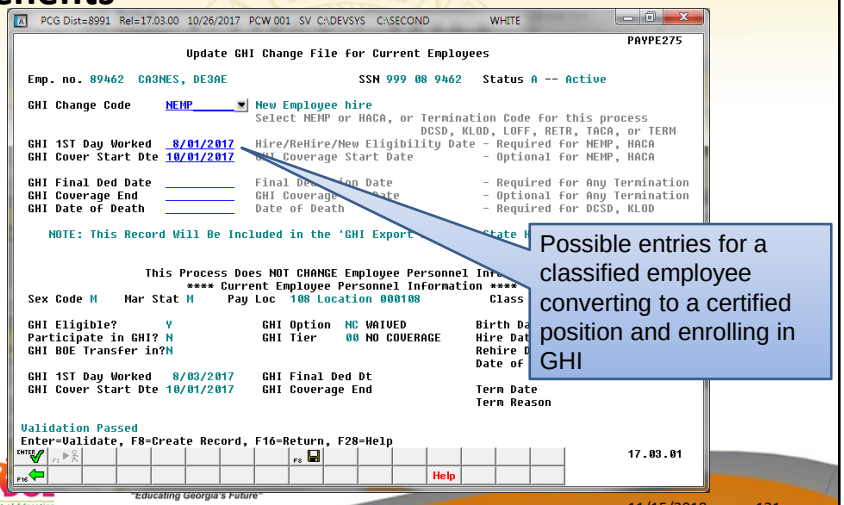


SHBP AUF File – Update GHI Change File for State Health Benefits

- The **HELP** screens tell exactly what this screen should be used for.
- This screen is used for current employees going on or off ACA based upon IRS requirements for full-time employees
- The **HACA** and **TACA** change codes.
- The help screen tells you exactly what fields are required for the selected **Change Code** entered

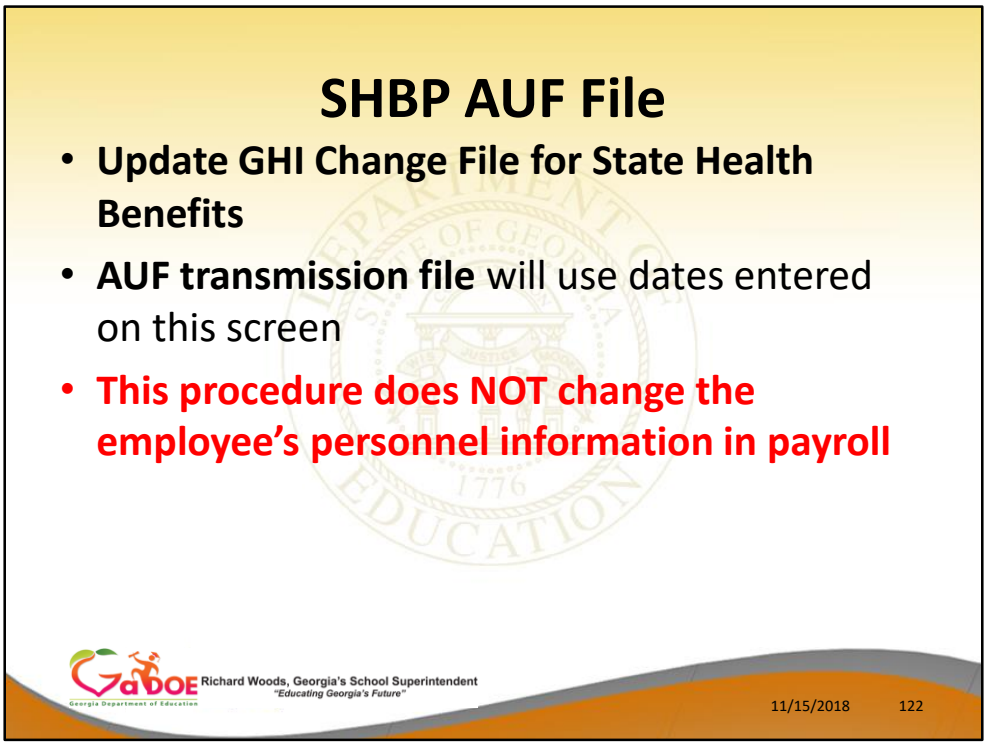
SHBP AUF File

- **Update GHI Change File for State Health Benefits**



SHBP AUF File – Update GHI Change File for State Health Benefits

- For example, here are possible entries for a classified employee converting to a certified position and enrolling in GHI
- Keep in mind…
- The **GHI Coverage Start** field and the **GHI Coverage End** field are optional fields and are typically used for an employee transferring to another school district.
- Per instructions from the Georgia State Health Agency, the **GHI Coverage Start** field should only be **used for summer transfers from May 1 through October 31**. During this timeframe, the date provided in this field will be used to replace the hire date when determining the benefit start date in the ADP system. According to the Georgia State Health Agency, the **BOE Coverage Start Date** field will allow payroll locations to start a transferring employee's coverage on the exact date selected by the BOE without the date rolling forward an additional month.
- The date provided in the **BOE Coverage End Date** field will allow payroll locations to end a transferring employee's coverage on the last day of the month selected by a BOE without the date rolling forward an additional month, regardless of the **Date of Last Deduction.**
- The date provided in this field will be used to replace the **Last Deduction Date** when determining the benefit end date in the ADP system.



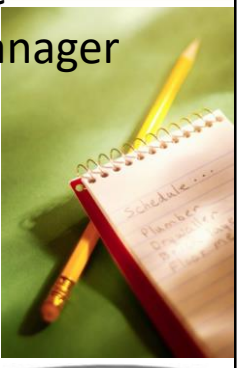
SHBP AUF File – Update GHI Change File for State Health Benefits

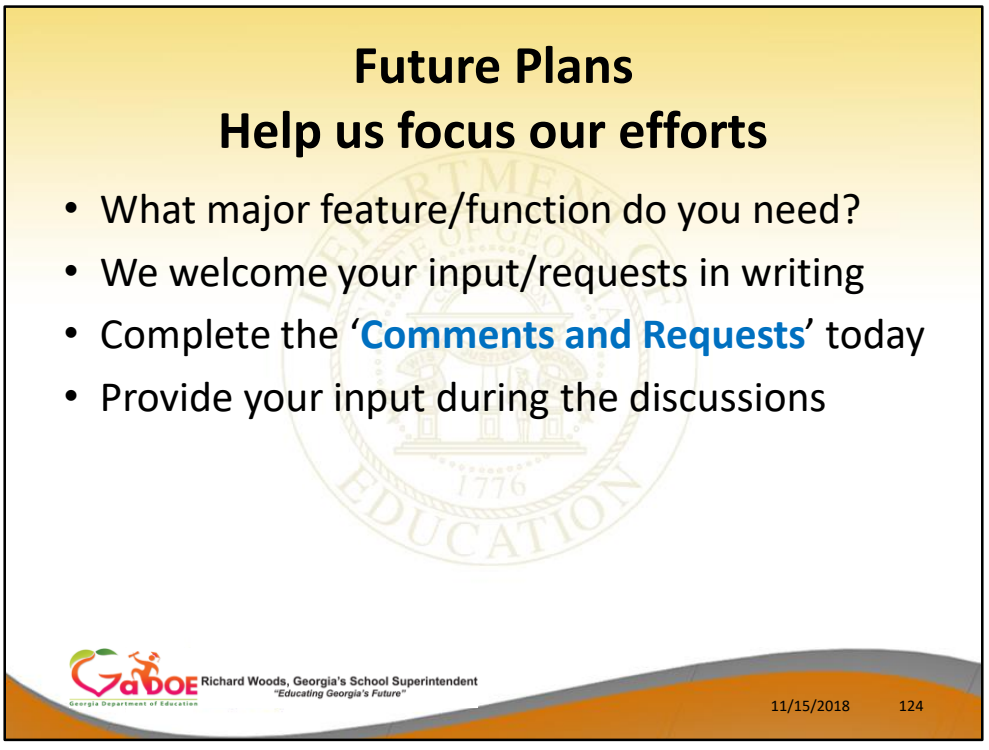
To reiterate…

- **This procedure does NOT change the employee's personnel information in payroll.**
- The only purpose is to generate an entry on the GHI Change File, not to change any data on the Update/Display Personnel Data screen.

Agenda

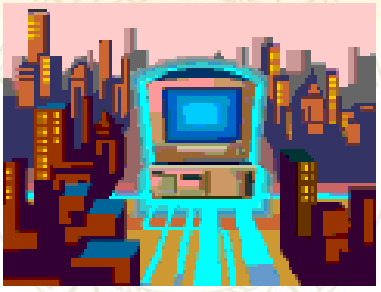
- Recent FAR Enhancements
- Recent Payroll Enhancements
- Upgrade of PCGenesis Print Queue
- Demo of the VerraDyne Queue Manager
- SHBP AUF Transmission File
- **User Input**





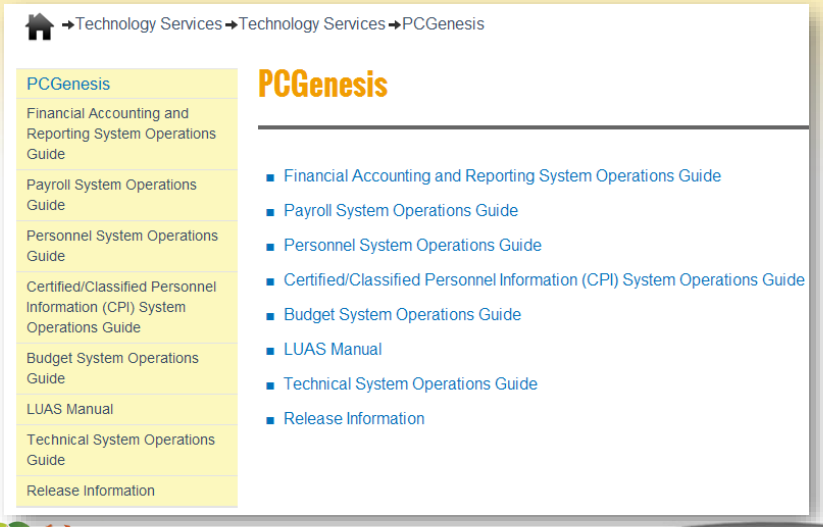
- In order for the PCGenesis development team to focus our efforts, we would greatly appreciate your input.
- We welcome your requests in writing – you can complete the 'Comments and Requests' forms today.
- We also welcome your input during the roundtable discussions which are on the GASO schedule.

PCGenesis Documentation

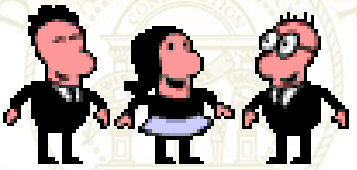


http://www.gadoe.org/Technology-Services/PCGenesis/Pages/default.aspx

PCGenesis Documentation



Questions?



Thank you for attending!