PCGenesis
Current Status & Future Plans

GASBO
Augusta, GA
November 9, 2022
Agenda

• Introduction
• Migration to Database Technology
• What’s Next
• Full Transaction Processing
• PCGenesis Databases
• Getting Ready for 2023 GHI
• PCGenesis Broadcast E-mail List
PCGenesis
Sessions/Training at GASBO

- **Session 1 – 8:40**  
  - PCGenesis Current Status & Future Plans  
  *Wed 11/9/2022*

- **Session 2 – 10:00**  
  - Ransomware Attacks and Backing Up PCGenesis  
  *Wed 11/9/2022*

- **Session 3 – 11:00**  
  - PCGenesis and the CPI Process  
  *Wed 11/9/2022*

- **Session 4 – 2:10**  
  - Payroll for Beginners  
  *Wed 11/9/2022*

- **Session 5 – 3:30**  
  - PCGenesis Budget System Overview  
  *Wed 11/9/2022*

- **Session 6 – 9:00**  
  - PCGenesis Budget System Gross Data, Budget Flag, Salary Schedules  
  *Thur 11/10/2022*

- **Session 7– 10:20**  
  - PCGenesis Budget System Playing in the Sandbox  
  *Thur 11/10/2022*

- **Session 8 – 11:20**  
  - PCGenesis Budget System Create Final Budget  
  *Thur 11/10/2022*
PowerPoints Available on Documentation Website

2022 GASBO PowerPoints will be available on PCG documentation website

### Calendar Year 2022 Release Information
- Release 22.03.00 – Miscellaneous Changes / Conversion to PCGenasisDB Database / Installation Instructions
- Release 22.02.00 – 2022 Fiscal Year-End Updates / Conversion to PCGenasisDB Database / Installation Instructions
- Release 22.01.00 – Miscellaneous Updates / Conversion to PCGenasisDB Database / Installation Instructions

### Calendar Year 2021 Release Information
- Release 21.04.00 – Calendar Year 2021 Year-End Closing Procedures / Miscellaneous Updates / Installation Instructions
- 2022 SHBP Employee Premiums
- Release 21.03.00 – Miscellaneous Changes / Conversion to PCGenasisDB Database / Installation Instructions
- Release 21.02.00 – 2021 Fiscal Year-End Updates / Conversion to PCGenasisDB Database / Installation Instructions
- Release 21.01.00 – Miscellaneous Updates / Conversion to PCGenasisDB Database / Installation Instructions

### Calendar Year 2021 PowerPoints
- GASBO 2021 Session 1 - PCGenasis Current Status and Future Plans
- GASBO 2021 Session 2 - PCGenasis Future: Migration to a Relational Database
PCGenesis Current Status

The PCGenesis Development Team:

- Diane Ochala
- Angela Tennyson
- Karen McArthur
- Stephanie Smith
PCGenesis Current Status

The PCGenesis development team reports to:

- **Steve Roache**, Director, Applications Development
- Steve Roache reports to **Jay Heap**, Associate Superintendent for Enterprise Services and Applications
- Jay Heap reports to **Dr. Keith Osburn**, Chief Information Officer, Deputy Superintendent for Technology Services
PCGenesis Current Status

The PCGenesis development team provides updates to:

- **Amy Rowell**, Director, Financial Review.
- Amy Rowell reports to **Rusk Roam**, Chief Financial Officer.
PCGenesis Current Status

In addition to the three developers, we have two help desk personnel.

- Katie Green
- Stephanie Smith

The PCGenesis help desk reports to:

- Kathy Aspy, Data Collections & Reporting Manager
- Kathy Aspy reports to Nicholas L. Handville, Chief Data and Privacy Officer Technology Services
PCGenesis Webinars

• Coming soon!!!
• **Stephanie Smith** will start hosting short PCGenesis informational webinars
  • Short segments on various topics
  • Suggestions are welcome!
  • Announcements will come via the portal and broadcast e-mails
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PCGENESIS FUTURE
Migration to Database Technology

• We are moving all PCGenesis data to a SQL Server database.

• We are using a FREE version of SQL Server called Microsoft SQL Server Express.
Advantages of a Relational Database

Microsoft SQL server is one of the most robust DBMS software used globally.
PCGENESIS FUTURE Migration to Database Technology

• We started the FAR conversion in 2019

• And now….  
  ➢ The FAR conversion is basically complete!
PCGENESIS FUTURE
Migration to Database Technology

The major financial files have been converted into database tables

- Banks
- Vendors
- Sources
- Accounts
- Audit
- Journals

- Investments
- Claims
- Purchase orders
- Receipts
- Receivables
- Control
PCGENESIS FUTURE
Migration to Database Technology

• We started the **PAY** conversion in March 2022
• And now….  
  ➢ The PAY conversion is basically complete!
The major payroll files have been converted into database tables:

- Payroll File
- Gross Data
- Deductions
- Manual Checks
- Voided Checks
- SANDBOX Files

- Garnishment Data
- Direct Deposit
- Personnel
- Earnings History
- Payroll Check Master
- CPI File
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What’s Next?

• So, we have finished the major files for the FAR and PAY conversion…

• What’s next????
22.03.01
November Release

• 2023 SHBP Premiums

• For the November release, the development team will post a single file which contains the new SHBP health premiums

  GHIRATES2023.csv

• The 22.03.01 release document will provide instructions for uploading the csv file into PCGenesis
The December, 2022 release will focus on legislative changes:

• Federal tax withholding tables and FICA limits will change
• Affordable Care Act (ACA) changes
• PCGenesis supports both
  ➢ 1099-MISC
  ➢ 1099-NEC
The December, 2022 release will focus on legislative changes:

- We don’t see any significant changes for W-2’s
- PCGenesis will support any new requirements for ACA
22.04.00
December Release

Continue the migration to the **database**:

- Convert ACA data (ACA1095)
- Convert ACA dependent data (DEPENDS)
2023 and Beyond

Continue the migration to the database:

• Convert *Enhanced Substitute Pay and Employee Leave* system to the database
23.01.00
March Release

Enhanced Leave System database conversion:

- PERDATA\LVSYS System Parameters
- PERDATA\LVADV Advance Formulas
- PERDATA\LVCLASS Payroll Class Parameters
- PERDATA\LVHIST Enhanced Leave History
- PERDATA\LVINPUT Current Leave Input File
- PERDATA\LGROSDAT Current Leave Gross Data
23.02.00 – 23.04.00

• Start converting the “minor” system data files to the database
• Convert the miscellaneous files and supporting files to the database
• Migration of all PCGenesis data to SQL Server Database
23.02.00 – 23.04.00

CPI

• CPI Control File
• Salary Schedule File
23.02.00 – 23.04.00

Financial

• ASSET File
• Control Files
  • DE 0046
  • DE 0106
  • DE 0396
• Object File
• BANK Micr File
• Signature File
23.02.00 – 23.04.00

Payroll files

- SHBP Employee Change File (EMPCHG)
- System annuity definitions (ANNUITY)
- System deduction definitions (DEDS)
- GHI rates (BENEDED)
- Payroll setup files (DATEFL, DEDCTL)
- Description Files (DESC, DESCA)
- Payroll Schedule File (PAYS)
- TAXES File
PCGENESIS FUTURE
Converting PCGenesis to RDBMS

• Converting to a relational database is a very, very big project
• We’re getting close to completion!
• During the conversion, major enhancements to PCGenesis will be limited
• Legislative requirements will always be addressed even during the conversion process
PCGENESIS FUTURE
Migration to Database Technology

At least 80+ individual files today

Combined into 1 database file tomorrow
PCGENESIS FUTURE
Converting PCGenesis to RDBMS

This is all great news for PCGenesis!!
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PCGENESIS FUTURE
Migration to Database Technology

• Full financial transaction processing was completed with release 21.03.00!!!
• What does full transaction processing mean for you?
PCGENESIS FUTURE
Migration to Database Technology

Help desk statistics for Fiscal Year Closing 2021 versus 2022…

➢ Out of Balance
  • 2021 – 14 DTICKETS
  • 2022 – 3 DTICKETS
PCGENESIS FUTURE
Migration to Database Technology

Rhonda Metts in Financial Review

“I don’t think that I have had any out of balance issues since last year’s closing. Whatever y’all did seems to have eliminated the partial postings. Yay!!”
PCGENESIS FUTURE
Migration to Database Technology
Transaction Processing: (ACID)

- Atomicity: Transactions are all or nothing
- Consistency: Only valid data is saved
- Isolation: Transactions do not affect each other
- Durability: Written data will not be lost
What does this mean??

• Data repairs should be a thing of the past
• Posting a financial transaction is “all or nothing”
Transaction Processing

If a problem occurs during posting, for example, a power outage....

• All updates will roll back

• We won’t end up missing the individual claim, journal, or receipt on file, but having the entry on the General Ledger
### Transaction Processing

**UPDATE** Person set Name = 'BBB' where ID = 3;

- **Data is saved into ALL tables**
- **ALL tables revert to original data**

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>ABC</td>
<td>34</td>
</tr>
<tr>
<td>2</td>
<td>XYZ</td>
<td>42</td>
</tr>
<tr>
<td>3</td>
<td>BBB</td>
<td>30</td>
</tr>
</tbody>
</table>

Commit;
Single Threaded Financial Transactions

SQL Critical Deadlock errors

• Two users post at the same time
• Each user is waiting for a record the other user controls
• This may have been the root cause of the “corrupt file” errors in the old days
Single Threaded Financial Transactions
Single Threaded Financial Transactions

Transaction_Gatekeeper table

• One record which is used as a “gatekeeper” to allow only **ONE** PCGenesis session to post at a time.

• The gatekeeper record locks when the first session starts to post a financial transaction.

• If the gatekeeper record is already locked, the second posting process must wait, while the first posting process finishes.
**Single Threaded Financial Transactions**

-Waiting for another user’s update process to complete-
-Wait!
-Don’t ‘X’ out!
Single Threaded Financial Transactions

Transaction Tracking Tables:

PCGenesis keeps permanent records of all financial and payroll transactions

- The user ID
- The name of the process
- Starting time
- Ending time
- Employee number for payroll transactions
Transaction Processing

**Transaction_Gatekeeper_Log**

- Retains a record of **every financial** transaction executed in the system

<table>
<thead>
<tr>
<th>TranLogID</th>
<th>Transaction_Log_user</th>
<th>Transaction_Log_process</th>
<th>Transaction_Log_Start_Datetime</th>
<th>Transaction_Log_description</th>
<th>Transaction_Log_End_Datetime</th>
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</thead>
<tbody>
<tr>
<td>94</td>
<td>24244</td>
<td>JE_Post</td>
<td>2022-10-07 18:11:06.0628812</td>
<td>Completed Successfully.</td>
<td>2022-10-07 18:11:06.1566427</td>
</tr>
<tr>
<td>99</td>
<td>24239</td>
<td>JE_Post</td>
<td>2022-10-07 17:34:02.7979096</td>
<td>Completed Successfully.</td>
<td>2022-10-07 17:34:02.2510839</td>
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<td>100</td>
<td>24238</td>
<td>Rev_Acct_Add_or_Update</td>
<td>2022-10-07 17:33:49.3188472</td>
<td>Completed Successfully.</td>
<td>2022-10-07 17:33:49.3344748</td>
</tr>
<tr>
<td>101</td>
<td>24237</td>
<td>Rev_Acct_Add_or_Update</td>
<td>2022-10-07 17:33:34.9247591</td>
<td>Completed Successfully.</td>
<td>2022-10-07 17:33:34.9560130</td>
</tr>
<tr>
<td>102</td>
<td>24236</td>
<td>Add_Updt_GL_Acct_Post</td>
<td>2022-10-07 17:32:52.8411359</td>
<td>Completed Successfully.</td>
<td>2022-10-07 17:32:52.9192703</td>
</tr>
</tbody>
</table>
Transaction Processing

Transaction_EmpNo_Gatekeeper(Log)

- Retains a record of every payroll transaction executed in the system

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>2203</td>
<td>RSS</td>
<td>CPICM100_Update_Cert_Data 73156</td>
<td>2022-10-07 15:02:15.4382841</td>
<td>Completed Successfully.</td>
</tr>
<tr>
<td>11</td>
<td>2202</td>
<td>RSS</td>
<td>CPICM100_Update_Cert_Data 53108</td>
<td>2022-10-07 14:58:56.4791382</td>
<td>Completed Successfully.</td>
</tr>
<tr>
<td>12</td>
<td>2201</td>
<td>RSS</td>
<td>CPICM100_Update_Cert_Data 53108</td>
<td>2022-10-07 14:58:47.8756870</td>
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</tr>
<tr>
<td>13</td>
<td>2200</td>
<td>RSS</td>
<td>CPICM100_Update_Cert_Data 2543</td>
<td>2022-10-07 14:44:49.1854372</td>
<td>Completed Successfully.</td>
</tr>
<tr>
<td>14</td>
<td>2199</td>
<td>RSS</td>
<td>CPICM100_Update_Cert_Data 2543</td>
<td>2022-10-07 14:36:32.4666237</td>
<td>Completed Successfully.</td>
</tr>
<tr>
<td>15</td>
<td>2198</td>
<td>ARM</td>
<td>CPICM010_Update_Cert_Type</td>
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<td>Completed Successfully.</td>
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<tr>
<td>16</td>
<td>2197</td>
<td>ARM</td>
<td>CPICM300_CPL_Rollover</td>
<td>2022-10-07 07:18:30.4294938</td>
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</tr>
<tr>
<td>17</td>
<td>2196</td>
<td>JML</td>
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<td>2022-10-03 10:41:44.1575205</td>
<td>Completed Successfully.</td>
</tr>
<tr>
<td>18</td>
<td>2195</td>
<td>JML</td>
<td>Update_Earnings_History</td>
<td>2022-09-30 07:31:05.0218798</td>
<td>Completed Successfully.</td>
</tr>
</tbody>
</table>
Payroll Change Log Feature

All additions, changes and deletions to the payroll file will be recorded to a change log that can be reported on.

For example, say you had the following scenario:

1. A new employee 5007 is added to the payroll file by user HFF on 2021-10-22 at 12:48:42.403.

2. User GGG updates 4 fields: **Contract_Gross**, **Contract_BiWeekly_Amount**, **State_Annual_Amount** and **Local_Annual_Amount** on employee record 5007 on 2021-10-22 at 13:09:08.563.

### **SUMMARY REPORT**

<table>
<thead>
<tr>
<th>Last_updated_by</th>
<th>last_updated_date</th>
<th>Log_Type</th>
<th>empno</th>
<th>Emp_name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HFF</td>
<td>2021-10-22 12:48:42.360</td>
<td>Record added</td>
<td>5007</td>
<td>KEVIN JONESWORTH</td>
</tr>
<tr>
<td>GGG</td>
<td>2021-10-22 13:09:08.543</td>
<td>Record Updated</td>
<td>5007</td>
<td>KEVIN JONESWORTH</td>
</tr>
<tr>
<td>MMM</td>
<td>2021-10-25 13:10:28.377</td>
<td>Record Updated</td>
<td>5007</td>
<td>KEVIN JONESWORTH</td>
</tr>
<tr>
<td>MMM</td>
<td>2021-10-26 14:05:25.010</td>
<td>Record Updated</td>
<td>5007</td>
<td>KEVIN JONESWORTH</td>
</tr>
</tbody>
</table>

### **DETAIL REPORT**

<table>
<thead>
<tr>
<th>Action_Date_time</th>
<th>userID</th>
<th>EmpNo</th>
<th>Action_Type</th>
<th>Item</th>
<th>New_value</th>
<th>Old_value</th>
</tr>
</thead>
<tbody>
<tr>
<td>2021-10-22 12:48:42.403</td>
<td>HFF</td>
<td>5007</td>
<td>Record added</td>
<td>EmpNO</td>
<td>5007</td>
<td></td>
</tr>
<tr>
<td>2021-10-22 12:48:42.403</td>
<td>HFF</td>
<td>5007</td>
<td>Record added</td>
<td>Emp_Name</td>
<td>KEVIN JONESWORTH</td>
<td></td>
</tr>
<tr>
<td>2021-10-22 12:48:42.403</td>
<td>HFF</td>
<td>5007</td>
<td>Record added</td>
<td>Emp_Status</td>
<td>T</td>
<td></td>
</tr>
<tr>
<td>2021-10-22 12:48:42.403</td>
<td>HFF</td>
<td>5007</td>
<td>Record added</td>
<td>Social_Security_Number</td>
<td>777999444</td>
<td></td>
</tr>
<tr>
<td>2021-10-22 12:48:42.403</td>
<td>HFF</td>
<td>5007</td>
<td>Record added</td>
<td>Name_Last</td>
<td>JONESWORTH</td>
<td></td>
</tr>
<tr>
<td>2021-10-22 12:48:42.403</td>
<td>HFF</td>
<td>5007</td>
<td>Record added</td>
<td>Name_First</td>
<td>KEVIN</td>
<td></td>
</tr>
<tr>
<td>2021-10-22 12:48:42.403</td>
<td>HFF</td>
<td>5007</td>
<td>Record added</td>
<td>Pay_Location_Site</td>
<td>196</td>
<td></td>
</tr>
<tr>
<td>2021-10-22 12:48:42.403</td>
<td>HFF</td>
<td>5007</td>
<td>Record added</td>
<td>Primary_Work_Location_Site</td>
<td>8010</td>
<td></td>
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<td>2021-10-22 12:48:42.403</td>
<td>HFF</td>
<td>5007</td>
<td>Record added</td>
<td>Address_Line1</td>
<td>654 Kensington ST</td>
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<tr>
<td>2021-10-22 12:48:42.403</td>
<td>HFF</td>
<td>5007</td>
<td>Record added</td>
<td>Address_City_State</td>
<td>SMITH, GA</td>
<td></td>
</tr>
<tr>
<td>2021-10-22 12:48:42.403</td>
<td>HFF</td>
<td>5007</td>
<td>Record added</td>
<td>Address_City</td>
<td>BLUE CITY</td>
<td></td>
</tr>
<tr>
<td>2021-10-22 12:48:42.403</td>
<td>HFF</td>
<td>5007</td>
<td>Record added</td>
<td>Address_State</td>
<td>GA</td>
<td></td>
</tr>
<tr>
<td>2021-10-22 12:48:42.403</td>
<td>HFF</td>
<td>5007</td>
<td>Record added</td>
<td>Contract_Gross</td>
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<td></td>
</tr>
<tr>
<td>2021-10-22 12:48:42.403</td>
<td>HFF</td>
<td>5007</td>
<td>Record added</td>
<td>Contract_BiWeekly_Amount</td>
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<td></td>
</tr>
<tr>
<td>2021-10-22 12:48:42.403</td>
<td>HFF</td>
<td>5007</td>
<td>Record added</td>
<td>State_Annual_Amount</td>
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<td></td>
</tr>
<tr>
<td>2021-10-22 12:48:42.403</td>
<td>HFF</td>
<td>5007</td>
<td>Record added</td>
<td>Local_Annual_Amount</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>2021-10-22 12:48:42.403</td>
<td>HFF</td>
<td>5007</td>
<td>Record added</td>
<td>Other_Annual_Amount</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>2021-10-22 13:09:08.563</td>
<td>GGG</td>
<td>5007</td>
<td>Record Updated</td>
<td>Contract_Gross</td>
<td>70000.00</td>
<td>0.00</td>
</tr>
<tr>
<td>2021-10-22 13:09:08.563</td>
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<td>Record Updated</td>
<td>Contract_BiWeekly_Amount</td>
<td>7000.00</td>
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<tr>
<td>2021-10-22 13:09:08.563</td>
<td>GGG</td>
<td>5007</td>
<td>Record Updated</td>
<td>State_Annual_Amount</td>
<td>70000.00</td>
<td>0.00</td>
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<tr>
<td>2021-10-22 13:09:08.563</td>
<td>GGG</td>
<td>5007</td>
<td>Record Updated</td>
<td>Local_Annual_Amount</td>
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</tr>
<tr>
<td>2021-10-25 13:10:28.827</td>
<td>MMM</td>
<td>5007</td>
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<tr>
<td>2021-10-25 13:10:28.827</td>
<td>MMM</td>
<td>5007</td>
<td>Record Updated</td>
<td>Primary_Work_Location_Site</td>
<td>196</td>
<td>8010</td>
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<tr>
<td>2021-10-26 14:05:25.410</td>
<td>GGG</td>
<td>5007</td>
<td>Record Updated</td>
<td>Name_Middle</td>
<td>JAMES</td>
<td></td>
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<tr>
<td>2021-10-26 14:05:25.410</td>
<td>GGG</td>
<td>5007</td>
<td>Record Updated</td>
<td>Pay_Location_Site</td>
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<tr>
<td>2021-10-26 14:05:25.410</td>
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<td>5007</td>
<td>Record Updated</td>
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<tr>
<td>2021-10-26 14:05:25.410</td>
<td>GGG</td>
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<td>Record Updated</td>
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<tr>
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<td>5007</td>
<td>Record Updated</td>
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# Payroll Change Log Feature

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Login / Logout History

Did you know…

• On the first of each month, the scheduled reorganization task creates a recap report which is a listing of all user logon information for that month

• Creates the *Detail for USERLIST Files* report

• Lists the login and logout information for each user who accessed the PCGenesis system
Login / Logout History

Did you know...

• The *Detail for USERLIST Files* report is stored in the `K:\BACKUP\LI` directory for a period of one to two years.

• File name: `LIyyymm01.TXT`, where...
  - `yy` is the *year* the recap was created
  - `mm` is the *month* the recap was created
Login / Logout History

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<td>01:01:00</td>
<td>DOD 07</td>
<td>DOD</td>
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<td>11:41:25</td>
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<td>Not Properly Closed</td>
</tr>
<tr>
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<td>PCG 001</td>
<td>PCG</td>
<td>08/05/2021</td>
<td>12:23:42</td>
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<td>10:48:10</td>
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<tr>
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<td>10:48:33</td>
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<tr>
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<td>DOD</td>
<td>08/09/2021</td>
<td>12:34:35</td>
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<td>DOD</td>
<td>08/09/2021</td>
<td>12:48:26</td>
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<td>01:01:00</td>
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</tr>
</tbody>
</table>
PCGENESIS FUTURE
Migration to Database Technology

How is database performance?

• Good news – we have a database expert working with our team!

• We have worked diligently to keep PCGenesis performance comparable to the old file technology

• Also good news… Our team will continue making changes to improve performance even more!
PCGENESIS FUTURE
Migration to Database Technology

How is database performance?

• Prior to 22.03.00 we discovered we had a bug when restoring FARDATAQ and/or PAYDATAQ tables

• Prior to 22.03.00, the restore of FARQ/PAYQ schema did not recreate the indices on the database tables

• This caused very, very slow system performance going forward.
PCGENESIS FUTURE Migration to Database Technology

How is database performance?

• This issue only affected school districts that executed a restore of FARDATAQ and/or PAYDATAQ at some point prior to 22.03.00
• Those districts experienced extremely long processing times
  ▪ For example, it was taking an hour or more to do a month end close
• This problem has been fixed!
PCGENESIS FUTURE
Database Integrity

“Reference Constraint”

- Enforcement of consistency standards on the PCGenesis data
- It is **NOT** possible to delete a general ledger, expense, or revenue account which is used in any other table in the system
Database Integrity
“Reference Constraint”

• This means that an account cannot be deleted until all related data is archived.

• An in-out journal (JE) that zeroes an account balance means that the user will NOT be able to delete the account.

• Typically data is retained for at least 7 years.
Database Integrity
“Reference Constraint”

Account can’t be deleted, even though balance is zero
Database Integrity
“Reference Constraint”

• Constraints also exist for bank codes.

• As data is converted into the PCGenesis database, bank codes have been added.

• The banks are used somewhere in PCGenesis: in a claim, a receipt, a journal, a vendor check, or wire transfer.

• Bank codes with a reference constraint cannot be deleted until all related data is removed first, usually during an archive operation.
Agenda

- Introduction
- Migration to Database Technology
- What’s Next
- Full Transaction Processing
- PCGenesis Databases
- Getting Ready for 2023 GHI
- PCGenesis Broadcast E-mail List
PCGenesis Databases

View of databases from within Microsoft SQL Server Management Studio
PCGenesis Databases

K:\PCGSQLdb
• Location of database
PCGenesis Databases

1) PCGenesisDB

- PCGenesis financial and payroll production data
- All of the important PCG data is in this database!
PCGenesis Databases

2) PCG_Master

- PCGenesis backup and restore logs
- Log information
- Needed if help desk needs to troubleshoot problems with your IT staff
PCGenesis Databases

3) PCG_Q_DB

- Corresponds to PAYDATAQ or FARDATAQ
- Backup of PAYDATA just before Calculate Payroll & Update YTD (Final) (F4)
- Backup of FARDATA just before updating budget files with vendor check information (F5)
PCGenesis Databases

4) PCG_D_DB

– Corresponds to PAYDATAD
– Backup of PAYDATA after printing payroll checks, but before printing payroll direct deposits (F2, F3, F5)
PCGenesis Databases

• Think of these databases as restore points
• Think of these the same way you think of PAYDATAQ, FARDATAQ, PAYDATAD, etc
  – PGG_Q_DB
  – PCG_D_DB
PCGenesis Databases

5) PCG_LOG_DB

- Contains a log of changes to
  - FAR.Bank_File
  - PAY.PAYROLL
PCGenesis Databases

6) VQueueDB
   - Contains the VerraDyne Print Manager associated tables and data
PCGENESIS FUTURE

Questions?
Agenda

• Introduction
• Migration to Database Technology
• What’s Next
• Full Transaction Processing
• PCGenesis Databases
• Getting Ready for 2023 GHI
• PCGenesis Broadcast E-mail List
New GHI Fields

GHI E-mail Preference:

- Designates whether the employee prefers to send their work e-mail address or their personal e-mail address to the State Health Benefits Program (SHBP)
- Valid values: ‘P’ for personal e-mail ‘W’ for work e-mail

Personal E-mail Address:

- The employee’s personal e-mail address

Work E-mail Address:

- The employee’s work e-mail address
# New GHI Fields

## Add New Employee

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Active</td>
</tr>
<tr>
<td>Emp. no.</td>
<td>33333</td>
</tr>
<tr>
<td>Pay Loc</td>
<td>101</td>
</tr>
<tr>
<td>Location</td>
<td>00010</td>
</tr>
<tr>
<td>Class</td>
<td>10</td>
</tr>
<tr>
<td>Job</td>
<td>2</td>
</tr>
<tr>
<td>Job Description</td>
<td>STAFF DEVELOP-SUBS</td>
</tr>
<tr>
<td>Ethnic</td>
<td>WHITE</td>
</tr>
<tr>
<td>Race (Select all that apply)</td>
<td>Yes: Hispanic/Latino, No</td>
</tr>
<tr>
<td>Certificate Type</td>
<td></td>
</tr>
<tr>
<td>CS1 Job (from CPI)</td>
<td>000</td>
</tr>
<tr>
<td>Include on CPI</td>
<td>Y</td>
</tr>
<tr>
<td>Sick Bank</td>
<td>N</td>
</tr>
<tr>
<td>Substitute rank</td>
<td></td>
</tr>
<tr>
<td>Hours Per Day</td>
<td></td>
</tr>
<tr>
<td>Birth Date</td>
<td>11/01/1961</td>
</tr>
<tr>
<td>GHI Eligible</td>
<td>Y</td>
</tr>
<tr>
<td>GHI BOE Trans</td>
<td>Y</td>
</tr>
<tr>
<td>GHI Option</td>
<td>B6</td>
</tr>
<tr>
<td>ANTHEM HMO</td>
<td></td>
</tr>
<tr>
<td>GHI 1st Day Wrk</td>
<td>1/01/2012</td>
</tr>
<tr>
<td>GHI Tier</td>
<td>10</td>
</tr>
<tr>
<td>GHI Coverage Start</td>
<td>2/01/2012</td>
</tr>
<tr>
<td>GHI Ded Cd</td>
<td>8</td>
</tr>
<tr>
<td>GHI Change Code</td>
<td>NEMP</td>
</tr>
<tr>
<td>GHI Email Pref (W or P)</td>
<td>P</td>
</tr>
<tr>
<td>Employee work e-mail</td>
<td><a href="mailto:DHUDDLE@SMITHSCHOOLS.EDU">DHUDDLE@SMITHSCHOOLS.EDU</a></td>
</tr>
<tr>
<td>Employee personal e-mail</td>
<td><a href="mailto:DHUDDLE@GMAIL.COM">DHUDDLE@GMAIL.COM</a></td>
</tr>
</tbody>
</table>

Validations passed. Check screen 2 or save your changes.

22.03.00
New GHI Fields
Update/Display Emergency Data

Employee: 33333 HUDDLE, DEBRA H.
Spouse: __________________________

Next of kin: __________________________ Relationship __________
Phone: __________

Emergency: __________________________ Relationship __________
Phone: __________

Doctor: __________________________ Phone: __________

Comments: __________________________

Employee work e-mail: DHUDDLE@SMITHSCHOOLS.EDU
Employee personal e-mail: DHUDDLE@GMAIL.COM

Emergency Data is on the Personnel System Menu
F3, F1, F5

Mode changed to update

ENTER = Validate, F8 = Update Record, F16 = Exit without Changes
Getting Ready for 2023 GHI

• GHI options B1, B2, B3, B6, H1, H2, and K1 are the same
• GHI tiers 10, 40, 90, 91, 94 – 97 are the same.
• Many GHI premium rates have changed for 2023.
Getting Ready for 2023 GHI

<table>
<thead>
<tr>
<th>Opt Tier</th>
<th>Long Description</th>
<th>Short Desc</th>
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</thead>
<tbody>
<tr>
<td>B8</td>
<td>TRICARE SUPPLEMENT</td>
<td>TRISUP</td>
</tr>
<tr>
<td>B1</td>
<td>BCBS GOLD</td>
<td>BCBS GOLD</td>
</tr>
<tr>
<td>B2</td>
<td>BCBS SILVER</td>
<td>BCBS SILVER</td>
</tr>
<tr>
<td>B3</td>
<td>BCBS BRONZE</td>
<td>BCBS BRONZE</td>
</tr>
<tr>
<td>B6</td>
<td>BCBS HMO</td>
<td>BCBS HMO</td>
</tr>
<tr>
<td>H1</td>
<td>UHC HMO</td>
<td>UHC HMO</td>
</tr>
<tr>
<td>H2</td>
<td>UHC HDHP</td>
<td>UHC HDHP</td>
</tr>
<tr>
<td>K1</td>
<td>KAISER HMO</td>
<td>KAISER HMO</td>
</tr>
<tr>
<td>NC</td>
<td>NO COVERAGE or COVERAGE WAIVED</td>
<td>WAIVED</td>
</tr>
<tr>
<td>NE</td>
<td>NOT ELIGIBLE for COVERAGE</td>
<td>NOT ELIGIBLE</td>
</tr>
</tbody>
</table>

GHI Option from Benefit File
Getting Ready for 2023 GHI
Getting Ready for 2023 GHI
How to Install 2023 GHI

1) Install PCGenesis Release 22.03.01. There will be instructions on how to upload the new 2023 GHI premium amounts into the Benefit Plan/Option/Tier Maintenance File.

2) Download the DCH open enrollment file.

3) Import State Health Options & Tiers from DCH File.

4) Set State Health Deduction Amount For Active Employees.
Getting Ready for 2023 GHI
How to Install Release 22.03.01

[Diagram showing the Payroll System menu with FKey numbers and corresponding menu items]

- Payroll Setup Menu
- Payroll Update Menu
- Payroll Check & Direct Deposit Menu
- Annual Reports Menu
- Monthly/Quarterly/Fiscal/Biennial Reports Menu
- Employee Reports/Labels Menu
- Update/Display Description/Deduction/Annuity Menu
- Earnings History Menu
- Check Reconciliation Menu
- Update/Display Payroll Monitor
- Special Functions Menu
- File Reorganization
Getting Ready for 2023 GHI
How to Install Release 22.03.01

Payroll System

FKey Description/Deduction/Annuity Files Menu

---

Description File:
1 -- Maintain Description Records
2 -- Maintain Alpha Description Records
4 -- Print Description Records

Deduction File:
5 -- Maintain Deduction Records
6 -- Print Deduction Records
7 -- Maintain Benefit Plan/Option/Tier Records
8 -- Import Benefit Plan/Option/Tier Records
9 -- Print Benefit Plan/Option/Tier Records

Annuity File:
10 -- Display/Update Annuity Deduction Control Record
11 -- Maintain Annuity Records
12 -- Verify/Print Annuity Records
Getting Ready for 2023 GHI
How to Install Release 22.03.01

Identify Benefit Plan/Option/Tier Premium Data Import File from Excel

Enter the import file path and name (e.g. C:\BENEDAT\SHBPCCYYYYRATES.CSV)
or F10 to Browse for file

K:\INSTAL\GHRATES2023.CSV

Enter = continue    or    F16 = Exit

17.01.00
Getting Ready for 2023 GHI
How to Install Release 22.03.01

No errors in Benefit Plan/Option/Tier Premium Import File.

Press enter to load Benefit Plan/Option/Tier Premium Import File.

Press F16 to STOP Process

Press ENTER to process or F16 to exit program
Getting Ready for 2023 GHI
How to Install Release 22.03.01
Getting Ready for 2023 GHI
How to Install Release 22.03.01

Print Benefit Plan Option Tier File

Report option:
- Employee premium rates
- Employer contribution amounts

Print rates in effect from: 1/01/2023 To: 12/31/2023
Getting Ready for 2023 GHI

• Download the DCH open enrollment file
Getting Ready for 2023 GHI

• Download the DCH open enrollment file
Getting Ready for 2023 GHI

• Download the DCH open enrollment file
Getting Ready for 2023 GHI

• Download the DCH open enrollment file
Getting Ready for 2023 GHI

- Download the DCH open enrollment file

Do NOT edit the open enrollment file in Microsoft Excel®. Editing the file in Excel causes the formatting of the file to change.
Getting Ready for 2023 GHI

Open Enrollment – Import GHI Option and Tier Elections

• Personnel System (F3)
• Special Functions Menu (F13)
• Import State Health Option & Tier from DCH File (F6)
Getting Ready for 2023 GHI

Next step: Import the Option & Tier File
Getting Ready for 2023 GHI

Open Enrollment – Import GHI Option and Tier Elections

Import State Health Option And Tier From DCH File

This process will update the GHI Option and Tier for all employees included in the open enrollment or monthly change file provided by the Department of Community Health.

Select Optional Field to Update:

- County of Residence

Enter the import file path and name OR F10 to Browse for File

C:\TEMP\ARCHIVE.CSV

Enter=Continue or F16=Exit
Getting Ready for 2023 GHI

Set GHI Deduction Amounts

• Personnel System (F3)
• Special Functions Menu (F13)
• Set State Health Deduction Amount For Active Employees (F8)
Getting Ready for 2023 GHI

Don’t forget F8 - Set Deduction Amounts
Getting Ready for 2023 GHI
Set GHI Deduction Amounts

Make sure to set the date to 01/01/2023

After running in trial mode make sure to finish by running in FINAL mode by entering ‘N’
## Getting Ready for 2023 GHI

### Set GHI Deduction Amounts

- Personnel System (F3)
- Special Functions Menu (F13)
- Set State Health Deduction Amount For Active Employees (F8)

### Table: SHBP Deduction Update Report

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<thead>
<tr>
<th>Emp Num</th>
<th>Employee Name</th>
<th>Work Loc</th>
<th>Pay Class</th>
<th>Ded Periods</th>
<th>Code</th>
<th>Plan Option</th>
<th>Plan Tier</th>
<th>Old Deduction</th>
<th>Old Flg</th>
<th>New Deduction</th>
<th>New Flg</th>
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<tbody>
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<td>087909</td>
<td>0G4E, 0B4IS</td>
<td>0188</td>
<td>06</td>
<td>12</td>
<td>09</td>
<td>58</td>
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<td>8.60</td>
<td>Y</td>
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<tr>
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<td>0G4E, EM4RSON</td>
<td>0188</td>
<td>03</td>
<td>12</td>
<td>08</td>
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<td>088500</td>
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<td>66</td>
<td>12</td>
<td>08</td>
<td>58</td>
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<td>12</td>
<td>08</td>
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**ERROR** **SHBP Option/Tier 07/97 not found in Benefit deduction file**

- 087379 PI4T, CL4SSIE | 2850  | 28  | 12  | 09  | 55  | 10 | 0.00 | Y | 8.60 | Y
- 087941 PO2DER, TI2N | 0103  | 56  | 12  | 09  | 05  | 96 | 137.00 | Y | 159.30 | Y
Agenda

• Introduction
• Migration to Database Technology
• What’s Next
• Full Transaction Processing
• PCGenesis Databases
• Getting Ready for 2023 GHI
• PCGenesis Broadcast E-mail List
PCGenesis User List

• The Ga DOE has created an e-mail user list for PCGenesis
• This is a discussion forum
• Users can broadcast an e-mail to all PCGenesis users enrolled in the group
PCGenesis User List

• We already have 209 registered users
• Any user involved with PCGenesis can join:
  • Financial Directors
  • Payroll Administrators
  • IT Specialists
PCGenesis User List

Those PCGenesis districts and RESAs that join the user list will be able to:

• Share ideas
• Discuss problems
• Have many more resources available for gaining insight into PCGenesis operations
PCGenesis User List

• Join by sending a blank e-mail to:
  join-pcgenesis@list.doe.k12.ga.us

• After joining, users can take advantage of discussion forums by sending e-mails to:
  pcgenesis@list.doe.k12.ga.us
Future Plans
Help us focus our efforts

• What major feature/function do you need?
• We welcome your input/requests in writing
• Complete the ‘Comments and Requests’ today
• Provide your input during the discussions
Site Recommendations

• Upgrade any server > 3 to 5 years old
• Implement **Remote Desktop** access !!!!
• Weekly full system backup of K:\*.* (Retain 3 weeks)
• Daily backups of data (K:\SECOND and K:\PCGSQNLDB) to CD/DVD/USB (Retain for 1 month)
• Document restore procedures for emergencies
PCGenesis Documentation

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

PCGenesis

- Financial Accounting and Reporting System Operations Guide
- Payroll System Operations Guide
- Personnel System Operations Guide
- Certified/Classified Personnel Information (CPI) System Operations Guide
- Budget System Operations Guide
- LUAS Manual
- Technical System Operations Guide
- Release Information
Questions?
Thank you for attending!