



PCGENESIS PERSONNEL SYSTEM OPERATIONS GUIDE

8/12/2019

Section A: Legacy Leave Processing,
V2.9

Revision History

Date	Version	Description	Author
8/12/2019	2.9	19.02.00 – Update the <i>Topic 3</i> with new screenshots.	D. Ochala
07/13/2015	2.8	15.02.00 – Update the <i>Personnel System Master Menu</i> .	D. Ochala
04/02/2015	2.7	15.01.00 – Moved documentation relating to the <i>Original Leave of Absence File</i> from this document to the <i>CPI Report and Data Transmission</i> menu.	D. Ochala
07/25/2013	2.6	13.02.00 – Updated <i>Topic 4: Creating the Original Leave of Absence File</i> with instructions for the <i>Enhanced Substitute Pay and Employee Leave System</i> .	D. Ochala
07/06/2012	2.5	12.02.00 – Updated the <i>Legacy Leave Menu</i> . Created <i>Import Employee Leave Data</i> section.	D. Ochala
01/21/2011	2.4	10.04.01 – Added new screen to <i>Update Employees' Job Code for CPI/Payroll/CSI</i> section.	D. Ochala
11/29/2010	2.3	10.03.01 – Updated <i>Printing the Employee Leave Data Report</i> section.	D. Ochala
10/04/2010	2.2	10.03.00 – Updated <i>Automatic Leave Update</i> section.	D. Ochala
07/06/2010	2.1	10.02.00 – Created <i>Overview</i> section.	D. Ochala
09/29/2008	2.0	08.03.00 – Updated screenshots, no procedural changes.	C. W. Jones

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Overview

The ***Automatic Leave Update - By Pay Class*** procedure allows employees' state or local leave to be added and deleted and increases the leave balances for specific pay classes. For example, PCGenesis users may use the procedure to increase the available sick leave for employees within the "Administrative" pay class.

Up to twenty (20) pay classes can be processed at the same time with the same leave parameters. This will allow users to save time if many pay classes use the same leave parameters.

The ***Automatic Leave Update - By Pay Class*** procedure also produces an ***Employee Leave Data Report***. The report will show the updated employee leave balances by type. Refer to ***1A. Employee Leave Data Report – Example*** for more information about the report.

NOTE: If the ***Enhanced Substitute Pay and Employee Leave System*** is in use, automatic leave updates using this procedure are NOT allowed.

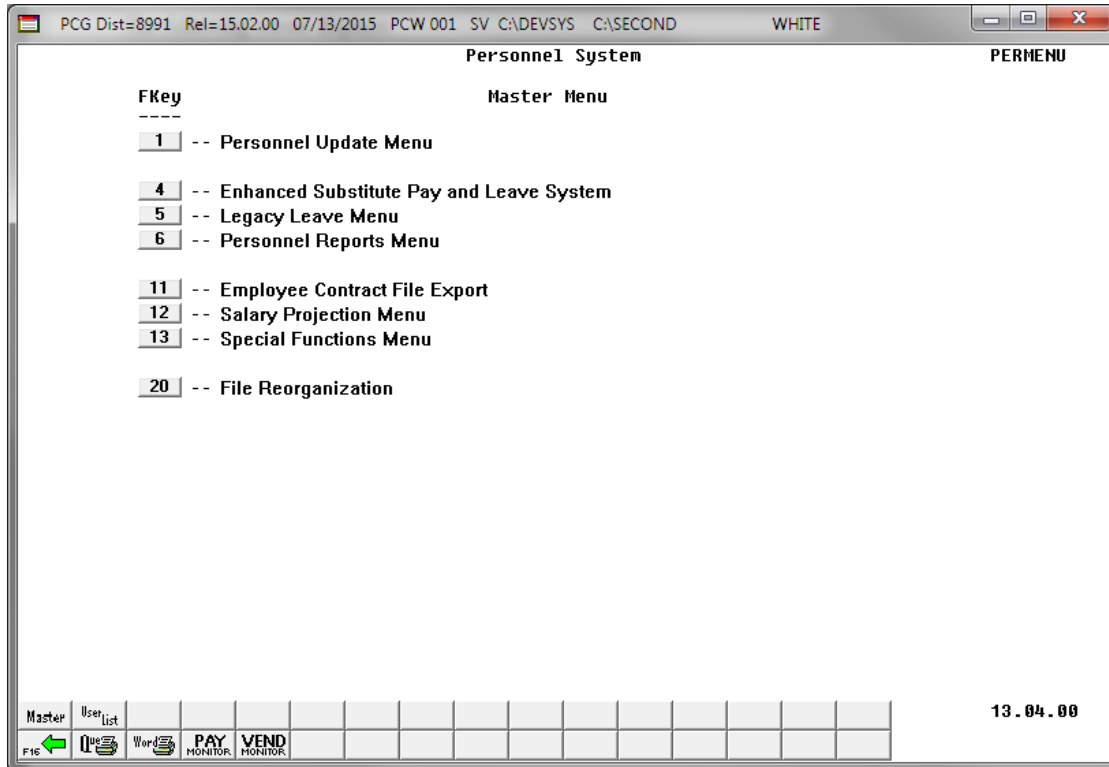
The ***Print Employee Leave Data*** report lists current and year-to-date leave balances for the ***State*** and ***Local*** leave categories, for all employees.

Topic 1: Printing the Employee Leave Data Report

The *Employee Leave Data Report* provides a listing of employee leave totals by type.

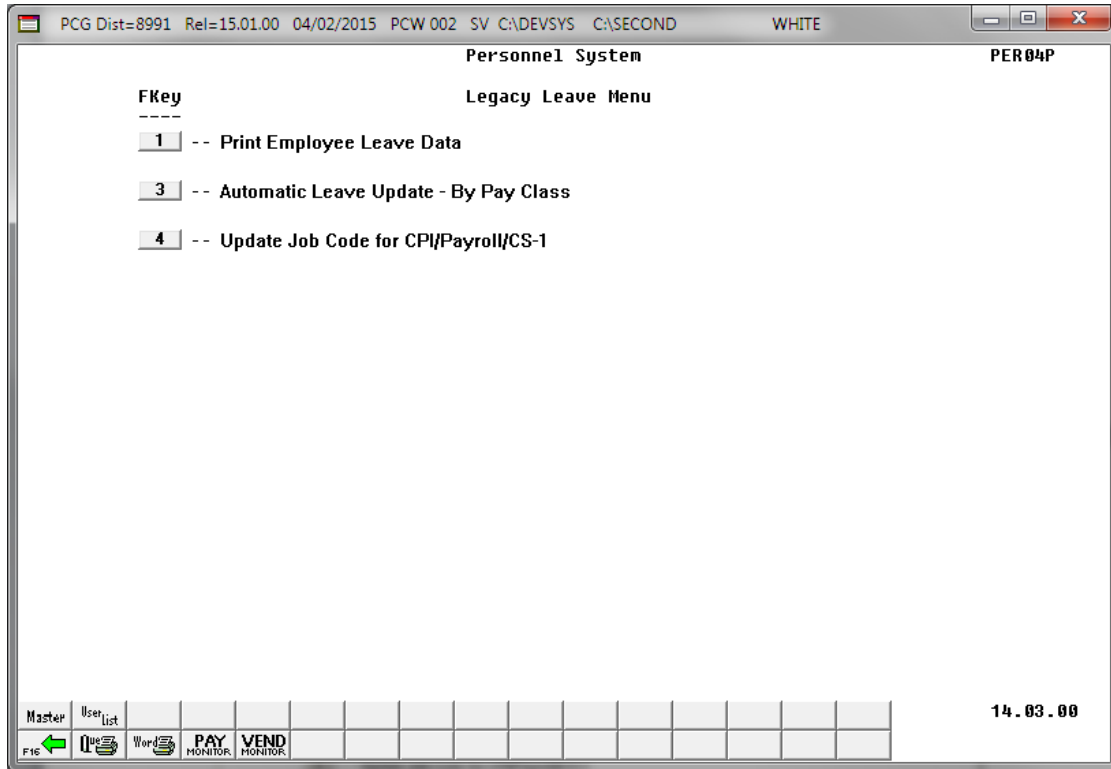
Step	Action
1	From the <i>Business Applications Master Menu</i> , select 3 (F3 - Personnel System).

The following screen displays:



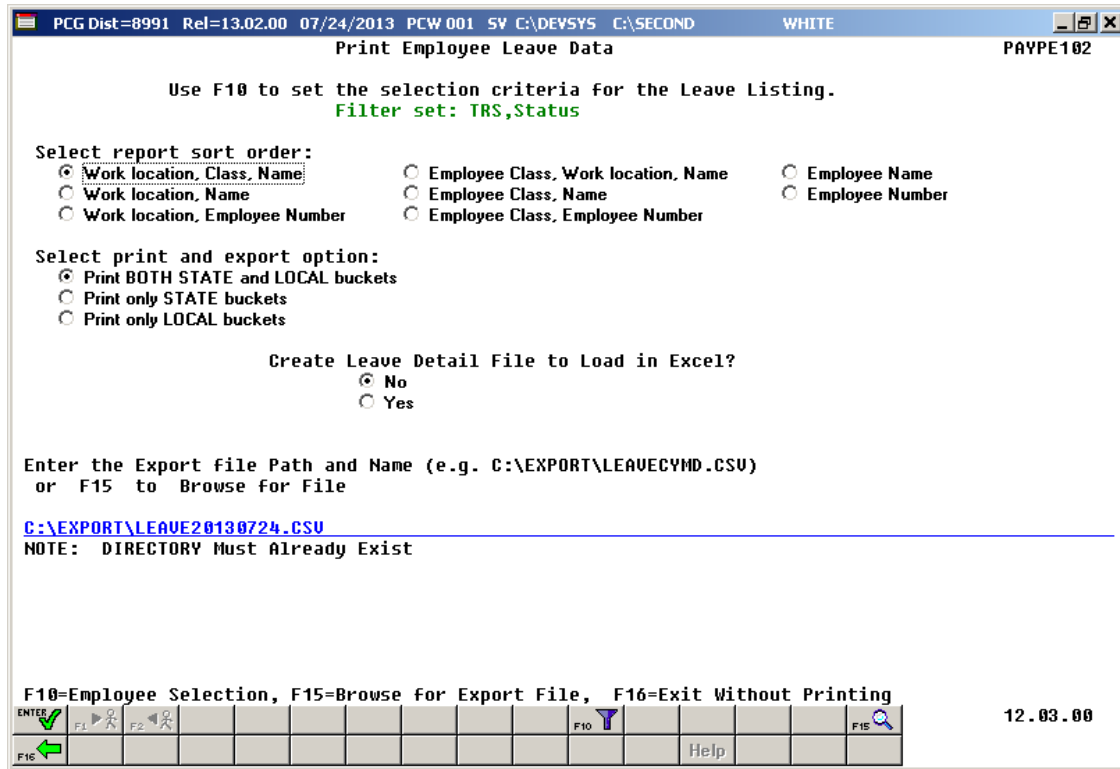
Step	Action
2	Select F5 (F5 – Legacy Leave Menu).





The following screen displays:





Step	Action
3	Select 1 (F1 - Print Employee Leave Data).

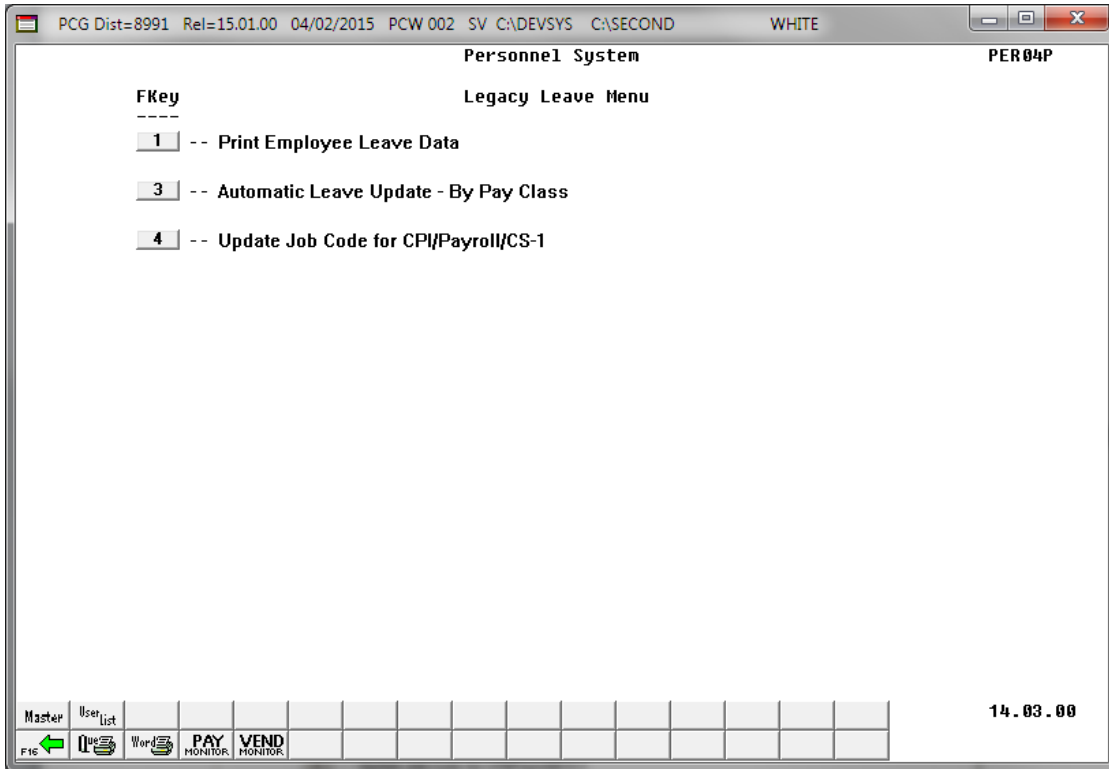
The following screen displays:







Step	Action
4	<p>To set specific search criteria: Select  (F10 – Set filter condition). On the <i>Print Employees’ Leave – Set Employee Selection Filter</i> screen, make the appropriate selections and entries. Verify “Filter conditions set.” displays.</p> <p>Refer to the <i>Payroll System Operations Guide, Section B: Payroll Update Processing, Topic 1: Set/Clear Employee Search Criteria</i> for the instructions on limiting the report results to specific search criteria.</p>
5	Select the radio button  to the left of the desired Select sort order option to identify the report’s sort order.
6	Select the radio button  to the left of the desired Select print and export options to identify the leave buckets (State and/or Local) to print and/or export.
7	Select the radio button  to left of the appropriate response in the Create Leave Detail File to Load in Excel? field. In order to produce a comma separated data file with the data from the report, select ‘Yes’. Otherwise, select ‘No’.
8	If creating an export file: Verify the C:\EXPORT folder exists, or create the folder where appropriate.

Step	Action
9	<p>If creating an export file: Enter C:\EXPORT\LEAVEccymmdd.csv in the Enter File Name and Path for Export File field, or select  (F15 to browse for export file) to locate the file manually.</p>
10	<p>Select  (Enter).</p> <p>If creating an export file: <i>If the filename from Step 9 is invalid, the “UNABLE TO OPEN LEAVE CSV FILE 35 = File Not Found” error message displays. In this instance, return to Step 9 to enter the correct information.</i></p> <p><i>“Processing Request” briefly displays where appropriate.</i></p>

The following screen displays:



Step	Action
11	Select  (F16 - Exit) to return to the <i>Personnel System Master Menu</i> , or select  (Master) to return to the <i>Business Applications Master Menu</i> .
12	<p>To print the report via the Uqueue Print Manager: Select  (Uqueue).</p> <p>To print the report via Microsoft® Word: Select  (MS WORD).</p> <p>Follow the instructions provided in the <i>Technical System Operations Guide, User Interface Procedures, Creating the Microsoft®-PCGenesis QWORD Macro for Report Printing</i> to create the macro necessary to use the feature where appropriate.</p>

1A. Employee Leave Data Report – Example

REPORT DATE: 07/05/2012		EMPLOYEE LEAVE DATA REPORT - STATE AND LOCAL BUCKETS										PAGE: 2		
REPORT TIME: 13:58		SORTED BY WORK LOCATION, NAME										PROGRAM: PAYPR102		
		Filter set: Status												
EMPNO	EMPLOYEE NAME	CLASS	WK	LOC	JOB	STAT	SICK	PERSONAL	VACATION	OTHER	W/O PAY	STAFF	SCK	BNK
87862	CH3RCHILL, HA3RISON	01	0100	003	A	8.75	0.00	0.00	0.00	0.00	0.00	0.00	0.00	STATE BAL
						0.00	0.00	0.00	0.00	0.00	0.00	0.00	STATE CUR	
						0.00	0.00	0.00	0.00	0.00	0.00	0.50	STATE YTD	
						0.00	0.00	0.00	0.00	0.00	0.00	0.00	LOCAL BAL	
						0.00	0.00	0.00	0.00	0.00	0.00	0.00	LOCAL CUR	
89412	CHSISTY, AL6A	08	0100	026	A	59.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	STATE BAL
						0.00	0.00	0.00	0.00	0.00	0.00	0.00	STATE CUR	
						5.75	1.00	0.00	0.00	0.00	0.00	5.00	STATE YTD	
						0.00	0.00	0.00	0.00	0.00	0.00	0.00	LOCAL BAL	
						0.00	0.00	0.00	0.00	0.00	0.00	0.00	LOCAL CUR	
87904	CH9ATE, CH9CK	01	0100	002	A	53.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	STATE BAL
						0.00	0.00	0.00	0.00	0.00	0.00	0.00	STATE CUR	
						12.00	0.00	0.00	0.00	0.00	0.00	0.00	STATE YTD	
						0.00	0.00	0.00	0.00	0.00	0.00	0.00	LOCAL BAL	
						0.00	0.00	0.00	0.00	0.00	0.00	0.00	LOCAL CUR	
88386	CR7SP, AU7USTINE	01	0100	003	A	14.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	STATE BAL
						0.00	0.00	0.00	0.00	0.00	0.00	0.00	STATE CUR	
						1.00	0.00	0.00	0.00	0.00	0.00	1.00	STATE YTD	
						0.00	0.00	0.00	0.00	0.00	0.00	0.00	LOCAL BAL	
						0.00	0.00	0.00	0.00	0.00	0.00	0.00	LOCAL CUR	
						0.00	0.00	0.00	0.00	0.00	0.00	LOCAL YTD		

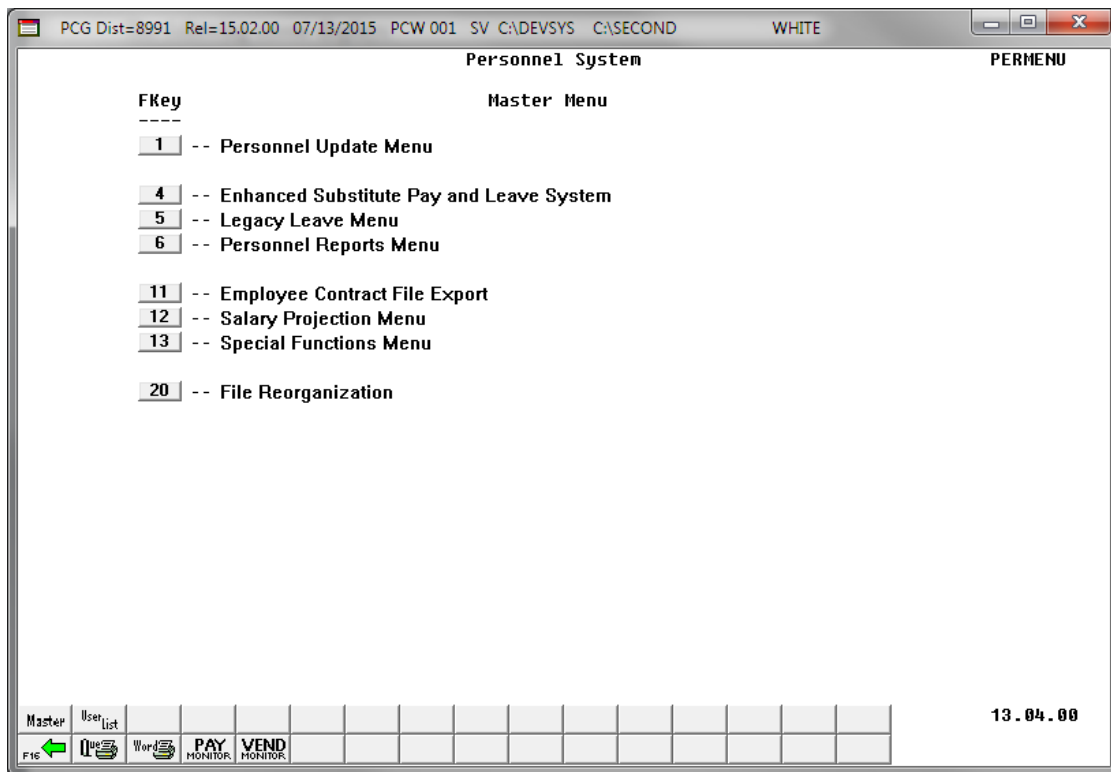
Topic 2: Automatic Leave Update – By Pay Class

The *Automatic Leave Update - By Pay Class* procedure allows employees’ state or local leave to be added and deleted and increases the leave balances for specific pay classes. For example, PCGenesis users may use the procedure to increase the available sick leave for employees within the “Administrative” pay class.

Up to twenty (20) pay classes can be processed at the same time with the same leave parameters. This will allow users to save time if many pay classes use the same leave parameters.

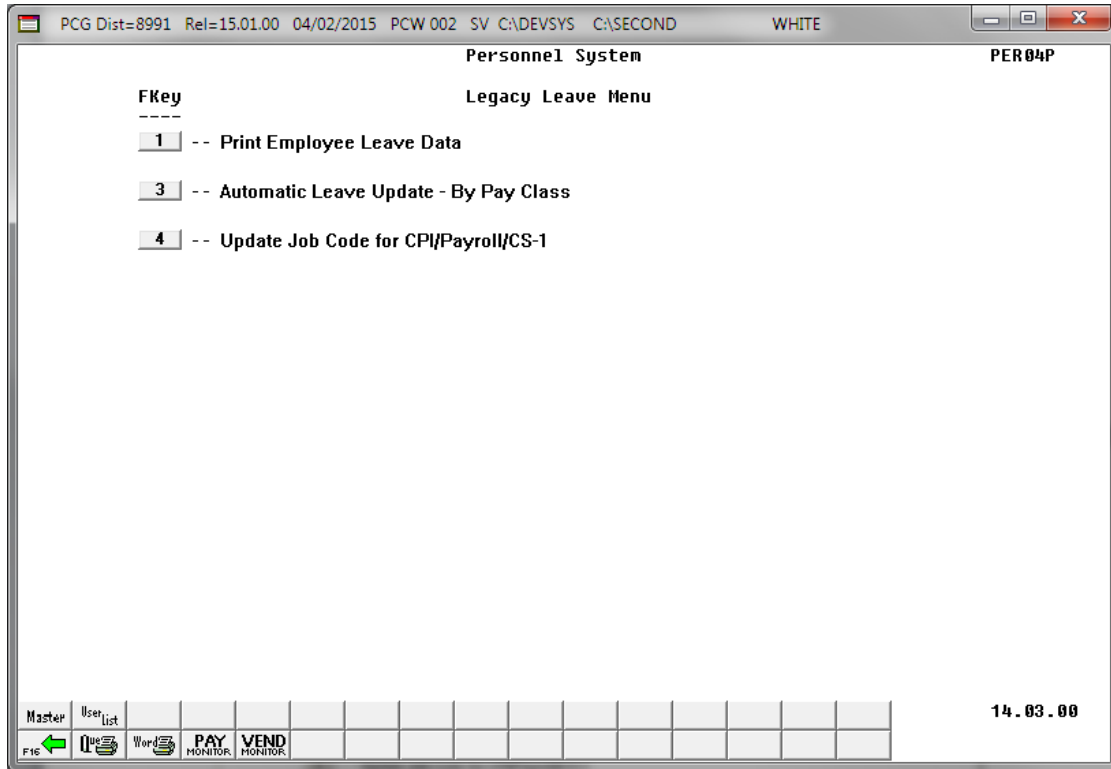
The *Automatic Leave Update - By Pay Class* procedure also produces an *Employee Leave Data Report*. The report will show the updated employee leave balances by type. Refer to *1A. Employee Leave Data Report – Example* for more information about the report.

NOTE: If the *Enhanced Substitute Pay and Employee Leave System* is in use, automatic leave updates using this procedure are NOT allowed.



Step	Action
1	Select F5 (F5 - Legacy Leave Menu).

The following screen displays:




Step	Action
2	Select F3 (F3 - Automatic Leave Update: By Pay Class).

The following screen displays:

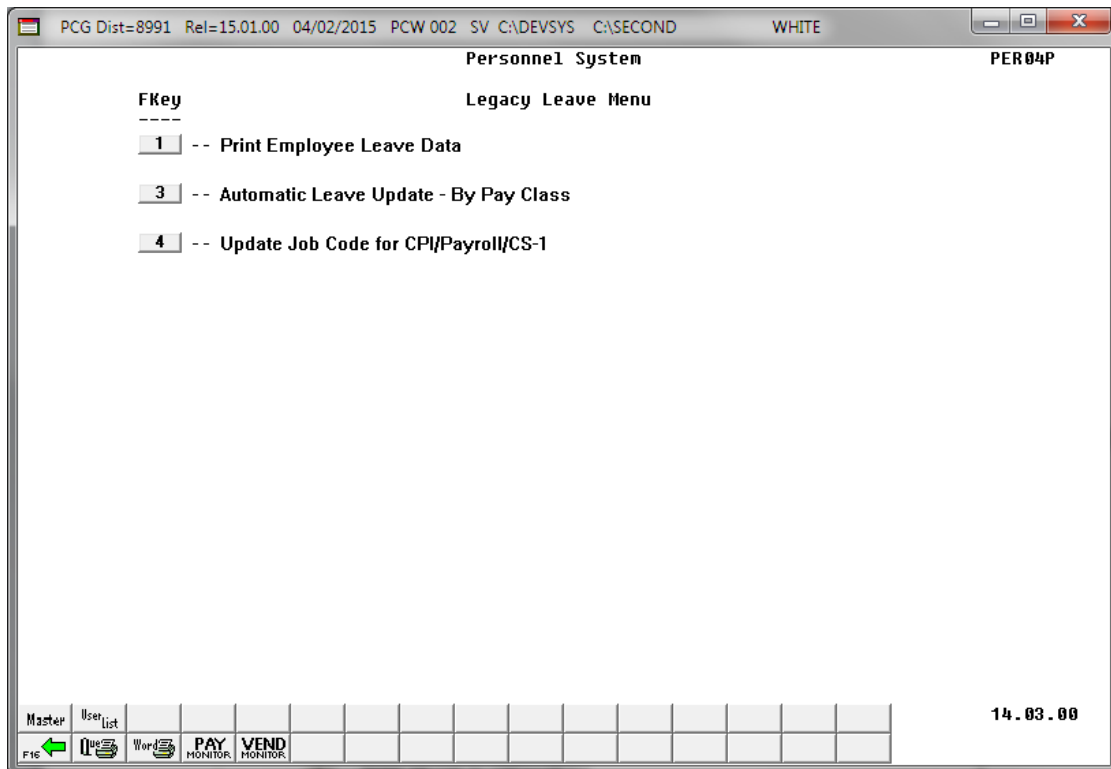
```






PCG Dist=8991 Rel=13.02.00 07/24/2013 PCW 001 SV C:\DEVSY5 C:\SECOND WHITE
Automatic Leave Update By Pay Class PER0050
This program will automatically update leave data for:
State or local (S or L)
Pay class(es):
Max Days to be Accumulated
Sick Leave days to be credited: .00 999.99
Other days to be credited: .00 999.99
Without Pay days to be credited: .00 999.99
Personal Business days to be credited: .00 999.99
Vacation days to be credited: .00 999.99
Staff Dev days to be credited: .00 999.99
Sick Bank days to be credited: .00 999.99
Should YTD leave totals be cleared? N (Y/N)
If yes, the following questions should be answered:
Drop unused days Add unused to sick bal
(Y/N) (Y/N)
Sick Leave N N
Other N N
Without Pay N N
Personal Business N N
Vacation N N
Staff Development N N
Sick Bank N N
ENTER = Continue, F16 = Exit without Updating 12.04.00
    
```

Step	Action
3	Enter S (State leave) or L (Local leave) in the State or Local (S or L) field.
4	Enter the code or select the drop-down selection icon  in the pay class fields to choose the pay class or classes to update. <i>Up to twenty (20) pay classes may be updated at the same time, provided the same leave parameters apply to each class.</i>
5	Enter the number of days <u>added to</u> the leave type in the appropriate days to be credited: fields.
6	Enter the maximum number of days allowed for accrual in the Max Days to be Accumulated (Maximum Days to be Accumulated) columns, where appropriate. A value of 999.99 indicates that the accumulation of days is unlimited for the corresponding leave type.
7	To delete the existing accumulated leave totals and to begin with the number of days entered in Step 5: Enter Y (Yes) in the Should YTD leave totals be cleared? field and proceed to <i>Step 8</i> . To add the number of days entered in Step 5 to the existing accumulated leave totals: Enter N (No) in the Should YTD leave totals be cleared? field, and proceed to <i>Step 9</i> .

Step	Action
8	<p>If Y (Yes) was entered in Step 7:</p> <p>To drop the <u>unused days</u> for the leave type: Enter Y (Yes) in the Drop unused days column and N (No) in the Add unused to sick bal column.</p> <p>To add the <u>unused days</u> for the leave type to the employee's Sick Leave balance: Enter N (No) in the Drop unused days column, and Y (Yes) in the Add unused to sick bal column</p>
9	<p>Verify the screen's entries are correct and select Enter <u>twice</u>.</p> <p>If the information is incorrect, make the necessary corrections, and select Enter twice.</p> <p>The "* * * Updating Leave Totals * * *" message will be displayed briefly.</p>

The following screen displays:



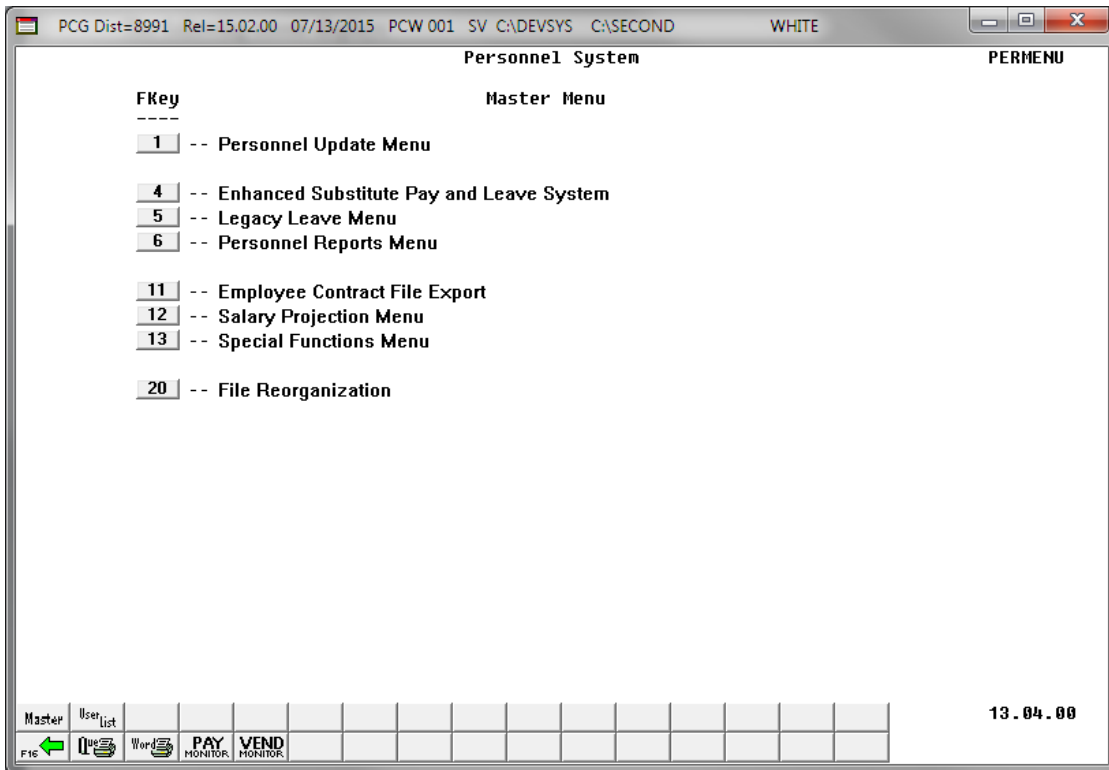
Step	Action
10	<p>To update an additional Pay Class(es): Select  (F3 - Automatic Leave Update: By Pay Class), and repeat this procedure beginning at <i>Step 3</i>.</p>
11	<p>Select  (F16 - Exit) to return to the <i>Personnel System Master Menu</i>, or select  (Master) to return to the <i>Business Applications Master Menu</i>.</p>
12	<p>The <i>Employee Leave Data Report</i> will be available in the print queue.</p> <p>To print the report via the Uqueue Print Manager: Select  (Uqueue).</p> <p>To print the report via Microsoft® Word: Select  (MS WORD).</p> <p>Follow the instructions provided in the <i>Technical System Operations Guide, User Interface Procedures, Creating the Microsoft®-PCGenesis QWORD Macro for Report Printing</i> to create the macro necessary to use the feature where appropriate.</p>

Topic 3: Update Employees' Job Code for CPI/Payroll/CS1

******* ATTENTION *******

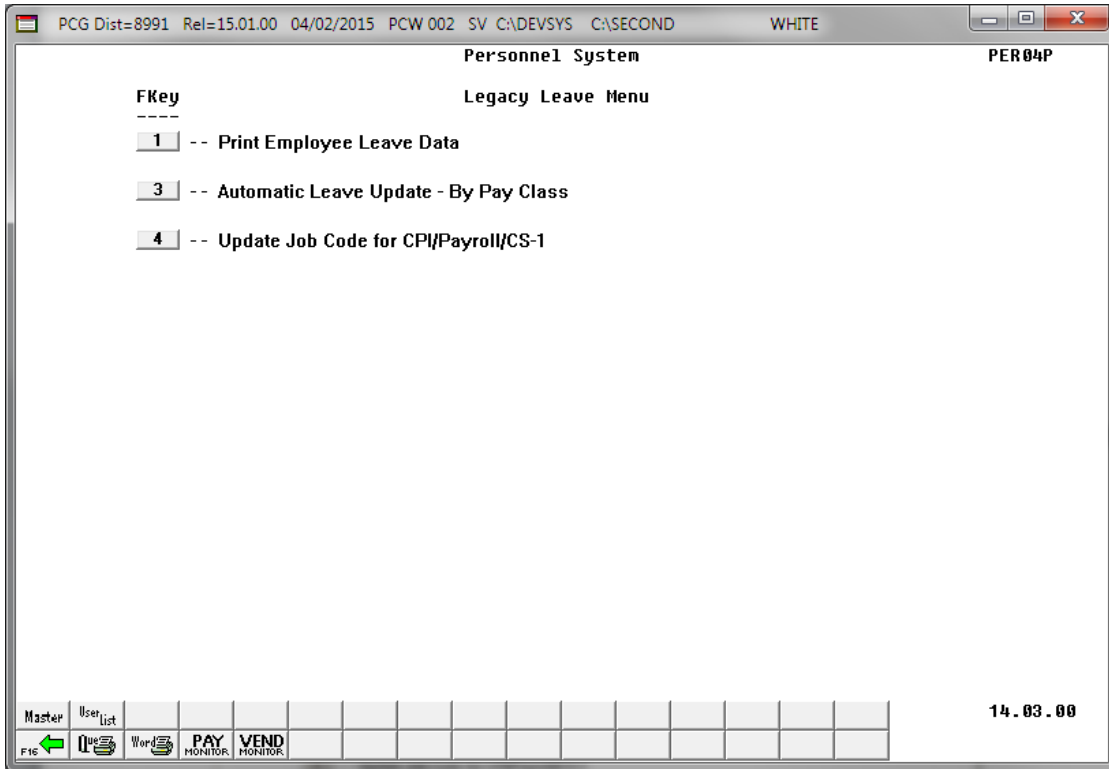
Perform this procedure after the June payroll and before changing Personnel assignments in CPI and Personnel Data for the new school year. The job code indicated as the first CPI assignment will be transferred to the **CS-1 Job (From CPI)** field on the employee's personnel record. PCGenesis transfers the **Current Year Contract Months** field's entry to the **Prior Year Contract Months** field on the employee's personnel record.

The completion of this procedure allows the *CS-1 Salary & Travel Expense Report* and the *Certified/Classified Personnel Information (CPI) Leave Data Transmission File* to be processed. After running this procedure, make further modifications to the employee's CS-1 job code on the employee's Personnel/Payroll Information screen, where appropriate.



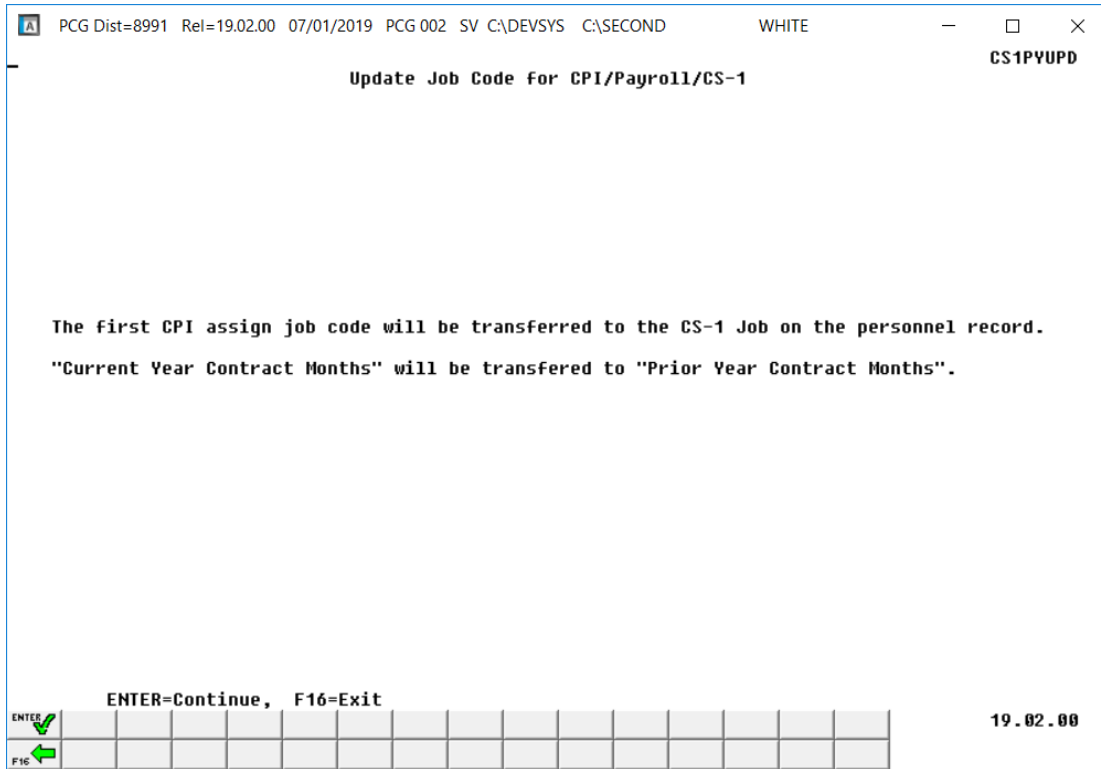
Step	Action
1	Select F5 (F5 - Legacy Leave Menu).




The following screen displays:



Step	Action
2	Select 4 (F4 - Update Job Code for CPI/Payroll/CS1).

The following screens displays:



Step	Action
3	<p>Select  (ENTER) to update the CS-1 Job (From CPI) field on the employee's personnel record, and to transfer the Current Year Contract Months field's entry to the Prior Year Contract Months field on the employee's personnel record.</p> <p><i>"Updating Payroll File with Job Code" briefly displays.</i></p> <p><i>The Personnel System Legacy Leave Menu redisplay.</i></p>
4	<p>Select  (F16 - Exit) to return to the <i>Personnel System Master Menu</i>, or select  (Master) to return to the <i>Business Applications Master Menu</i>.</p>