MEMORANDUM

TO: PCGenesis System Administrators

FROM: Steven Roache, Senior Information Systems Manager

SUBJECT: Release 17.02.00 – Fiscal Year 2017 (FY17) Year-End Updates and Miscellaneous Changes / Installation Instructions

This document contains the PCGenesis software release overview and installation instructions for Release 17.02.00.

PCGenesis supporting documentation is provided at:

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

June, 2017 Payroll Completion Instructions

Install this release after completing the June 2017 payroll(s). Install this release before executing F4 – Calculate Payroll and Update YTD for the July 2017 payroll.

Please import the FY 2018 CPI Salary Schedule into PCGenesis. The 2018 CPI Salary Schedule is available on the PCGenesis documentation web page.

The Fiscal Year End Checklist is available on the PCGenesis documentation web page. Please follow the instructions for completing the fiscal year end closing in the order provided.

For users of the new Enhanced Substitute Pay and Employee Leave System, to begin a new leave plan year, 1) Run the Plan Year Rollover Processing (F3, F4, F2, F11) for ALL Leave Types first, and 2) Run the Advance Leave (F3, F4, F2, F10) second. The Create Original Leave of Absence File (F4, F9, F6) step can be run at any time since the leave data is pulled from the Leave History File.

For users of the Legacy Leave System, to begin a new leave plan year, 1) Create the Original Leave of Absence File (F4, F9, F6) first in order to capture FY 2017 leave totals for CPI reporting, and 2) Run the Automatic Leave Update (F3, F5, F3) second in order to clear the FY 2017 Fiscal Year leave totals.
A PCGenesis E-mail User List Is Available

The Georgia Department of Education has created an e-mail user list for PCGenesis. PCGenesis users can join the list by sending a blank e-mail to:

join-pcgenesis@list.doe.k12.ga.us

After joining the PCGenesis user list, users can take advantage of discussion forums by sending e-mails to:

pcgenesis@list.doe.k12.ga.us

An e-mail sent to pcgenesis@list.doe.k12.ga.us will broadcast the e-mail to all PCGenesis users enrolled in the group. Those PCGenesis districts and RESAs that join the user list will be able to share ideas, discuss problems, and have many more resources available for gaining insight into PCGenesis operations. Join today!
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Section A: Overview of Release

A1. PCGenesis System Enhancements

A1.1. Major Upgrade of PCGenesis is Completed - Programs Recompiled Using Micro Focus® Runtime 10.0.1

The PCGenesis development team has been working on a number of fronts to bring PCGenesis software up to more modern standards. This effort includes upgrading the runtime software and was completed with Release 16.03.00 which was sent out on September 30th, 2016. This step replaced the directory K:\ACUCBL.

In this release, the next step in the modernization effort is completed and includes recompiling all PCGenesis programs. Most of these updates take place “behind the scenes” and users might not be aware of the changes, however a lot of effort was required to complete the upgrade. In this release all modules in K:\SYSTEM, K:\UTILITY, and K:\UNIACUSHELL have been replaced. Replacing these directories required extensive quality assurance testing to make sure all PCG processes continued to work as expected. Testing was completed on all old and new Windows Server operating system versions. With this release, PCGenesis system software is now up to current levels, and the entire PCG software deck has been recompiled to take advantage of the upgraded AcuCobol runtime software.

NOTE: During release installation, three backup directories are created by the system. These directories contain a backup of the original files which are being replaced with this release. After the release is applied, the following directories will be found on the PCGenesis server:

- K:\SYSTEM_JUNE_2017
- K:\UTILITY_JUNE_2017
- K:\UNIACUSHELL_JUNE_2017

Please note that these backup directories should remain on the PCGenesis server. The backup directories will be automatically deleted in a future PCGenesis release.

This is an important announcement concerning PCGenesis compatibility with the Windows Server operating system. As of March 31, 2017, PCGenesis will no longer support the Windows Server 2000 operating system, or any earlier operating systems. With this release, PCGenesis software will not run on Windows Server 2000.

With PCGenesis release 16.03.00 (delivered September 30, 2016) the PCGenesis Development Team announced a major upgrade of the Micro Focus® runtime software. The GaDOE purchased the latest Micro Focus® AcuCobol runtime software for all PCGenesis school districts and RESAs, spending approximately, $75,000 to obtain the new software, a significant investment into the future of PCGenesis.

The new AcuCobol Extend 10.0.1 runtime software allows PCG to run on the newest Microsoft operating systems, including Windows 10 for workstations and Windows Server 2012 and 2016 for servers. This upgrade will extend the life of PCG for at least the next 5 to 10 years, and PCG will now have access to the latest tools and features of Extend 10.0.1, including new and better graphical user interfaces.

NOTE: Windows Server 2012 and Windows Server 2016 are now supported!!!!!
NOTE: Workstation Windows 8 and Windows 10 are now supported!!!!!

PCGenesis will continue to support Windows Server 2003 and Windows Server 2008 until further notice. Server 2008 R2 64 bit and Windows 7 pro 64 bit have been successfully installed in a number of PCGenesis sites and are strongly recommended.

A1.3. PCGenesis Print Queue Upgrade – Work In Progress

The PCGenesis development team is also researching an upgrade of the PCGenesis Print Queue software. This will require another significant investment by the Georgia Department of Education and could cost between $15,000 and $25,000 to provide the latest, greatest print queue software for PCGenesis users.
A2. Payroll System


Support has been added for the new Georgia Department of Labor Quarterly Wage File Upload Specifications (F2, F5, F5). Now, PCGenesis will optionally create an Excel .csv spreadsheet to allow the upload of DOL data to the GA DOL portal. The new excel format may be uploaded to the GA Department of Labor via their web site. This feature will facilitate reporting data to the Georgia Department of Labor.

Now, the user has two choices for sending DOL data to the state. The user may either snail-mail the file created in the C:\SECOND\GOSEND directory to the Georgia Department of Labor, or the user may upload the csv file created in the C:\EXPORT directory via the internet to the DOL portal.
A2.2. New Teachers Retirement System (TRS) Rates for FY 2018

The TRS Board of Trustees has adopted the following changes to the employer and employee contribution rates effective July 1, 2017.

<table>
<thead>
<tr>
<th>Fiscal Year 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRS</td>
</tr>
<tr>
<td>Employer Rate: 16.81%</td>
</tr>
<tr>
<td>Employee Rate: 6.00%</td>
</tr>
</tbody>
</table>

This release automatically updates the TRS rates into PCGenesis.

A2.3. Payroll Setup - Prompt for TRS Service Indicator and Pay Reason

An enhancement has been made to the Payroll Setup process (F2, F1, F1) to facilitate TRS reporting in the calendar months of June, July, August, and September. Now, when a payroll is run in June, July, August, or September and TRS is selected for the payroll, the screen shown below will be displayed. The settings on the Payroll Setup screen for the TRS Mass Change Options have been verified as accurate by TRS personnel.

Setup Payroll – Select TRS Mass Change Option Screen
The **Select TRS Mass Change Option** screen allows the user to decide whether or not to **mass change** the **TRS Service Indicator** and the **Gross Data Pay Reason** codes according to the table displayed on the screen. To “opt out” of the mass updates, simply enter ‘N’ in the **Update** field. Otherwise, if ‘Y’ is entered in the **Update** field, all active TRS employees will be affected as described below.

On the **Select TRS Mass Change Option** screen shown above, if the user sets the **Update June?** switch to ‘Y’ in June, employees with a **Contract Months** field of 09 and 10 will have TRS service credit turned off, and will have their **Gross Data Pay Reason** codes set to 91 (Summer Accrued Pay). Employees with a **Contract Months** field of 11 will have TRS service credit turned on, and will have their **Gross Data Pay Reason** codes set to 00 (Regular Pay).

If the user sets the **Update July?** switch to ‘Y’ in July, employees with a **Contract Months** field of 09, 10 and 11 will have TRS service credit turned off, and 09, 10, and 11 month employees will have their **Gross Data Pay Reason** codes set to 91 (Summer Accrued Pay).

If the user sets the **Update August?** switch to ‘Y’ in August, employees with a **Contract Months** field of 09 and 10 will have TRS service credit turned off, and will have their **Gross Data Pay Reason** codes set to 91 (Summer Accrued Pay). Employees with a **Contract Months** field of 11 will have TRS service credit turned on, and will have their **Gross Data Pay Reason** codes set to 00 (Regular Pay).

If the user sets the **Update September?** switch to ‘Y’ in September, employees with a **Contract Months** field of 09, 10, or 11 will have TRS service credit turned on, and will have their **Gross Data Pay Reason** codes set to 00 (Regular Pay).

All **Gross Data Pay Reason** codes are automatically returned to 00 (Regular Pay) in calendar months September thru May.

All active TRS employees will be affected as described above. However, a new field has been added to the **Update/Display Gross Data** screen which will allow the user to “lock” an employee’s **TRS Service Indicator** for designated employees. The **TRS Service Lock** field indicates whether or not to lock the **TRS Service Indicator** so that TRS service is not changed during any **mass change** payroll procedure.
A3. Certified/Classified Personnel Information (CPI) System

A3.1. Upload the 2018 CPI State Salary Schedule

The PCGenesis documentation website provides the PCGenesis CPI Salary Schedule.csv File – 2018. Supporting documentation at that location provides the corresponding instructions to import the information into PCGenesis.

A3.2. New Import for CPI Assignments

The Export of Selected Payroll / Deduction / CPI Data (F2, F13, F8, F5) option has been enhanced to allow creation of a spreadsheet that can be used to import CPI assignment data. The CPI data spreadsheet can then be imported from the Import Selected Payroll Information or CPI Assignment Data menu option (F2, F13, F8, F6) as shown below.

![Image of spreadsheet import process](image)
Section B: Installation Instructions for Release 17.02.00 Software

B1. Perform a PCGenesis Full Backup

When the prior evening’s backup was successful, and when installing Release 17.02.00 before performing any work in PCGenesis for the day, proceed to B2. Install PCGenesis Release. In addition to its current labeling, also label the prior evening’s backup CD/DVD/tape as “Data Backup Prior to Release 17.02.00”. Continue to use the backup CD/DVD/tape in the normal backup rotation.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Verify all users are logged out of PCGenesis.</td>
</tr>
<tr>
<td>2</td>
<td>Close Uspool at the server.</td>
</tr>
<tr>
<td>3</td>
<td>Perform a PCG Full Backup to CD or DVD or Tape.</td>
</tr>
<tr>
<td>4</td>
<td>When the PCGenesis backup completes, label the backup CD or DVD or tape “Full System Backup Prior to Release 17.02.00”.</td>
</tr>
<tr>
<td>5</td>
<td>Proceed to B2. Install PCGenesis Release 17.02.00.</td>
</tr>
</tbody>
</table>
## B2. Install PCGenesis Release 17.02.00

**FROM THE PCGENESIS SERVER**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Verify all users are logged out of PCGenesis.</td>
</tr>
<tr>
<td>2</td>
<td>Open Windows® Explorer.</td>
</tr>
<tr>
<td>3</td>
<td>Navigate to the K:\INSTAL directory.</td>
</tr>
</tbody>
</table>
| 4    | Verify PCGUNZIP.EXE, RELINSTL.BAT, and INSTLPCG display.  
*If PCGUNZIP.EXE and RELINSTL.BAT and INSTLPCG do not display, return to the MyGaDOE Web portal, and detach the files from the Web portal again.* |
| 5    | Right-click RELINSTL.BAT and select **Run as administrator** to perform the installation.  
*A status screen will display showing the release steps as they are completed.* |

A screen will display showing the progress of the installation:
For PCGenesis Release 17.02.00 successful installations, the following message displays:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>Select <strong>Enter</strong> to close the window.</td>
</tr>
</tbody>
</table>
| 7    | **If the installation was successful:** Proceed to B3. **Verify Release 17.02.00 Was Successfully Installed.**  
**If the installation was unsuccessful:** Proceed to Step 8. |
A problem message displays if an error occurred:

![Error Message]

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>8</td>
<td>Select <strong>F16</strong> to close the window.</td>
</tr>
<tr>
<td>9</td>
<td>Return to the <em>MyGaDOE</em> Web portal, and detach the files again.</td>
</tr>
<tr>
<td>10</td>
<td><strong>Contact the Technology Management Customer Support Center for additional assistance if needed.</strong> A description of the error will display with instructions to call the Help Desk.</td>
</tr>
</tbody>
</table>
A warning message will display if the release installation is repeated, but in this case, the installation is considered successful. In this instance, select any key to continue:
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>Proceed to B3. Verify Release 17.02.00 Was Successfully Installed.</td>
</tr>
</tbody>
</table>
B3. Verify Release 17.02.00 Was Successfully Installed

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Log into PCGenesis.</td>
</tr>
<tr>
<td>2</td>
<td>From the Business Applications Master Menu, select F30 (System Utilities).</td>
</tr>
<tr>
<td>3</td>
<td>From the System Utilities Menu, select F17 (Display Current Release Number).</td>
</tr>
</tbody>
</table>

The following screen displays:

```
The Following D.O.E. Releases Have Been Successfully Loaded:
DOE 15.01.00 03/31/2015
DOE 15.02.00 07/07/2015
DOE 15.03.00 09/30/2015
DOE 15.03.01 12/01/2015
DOE 16.02.00 12/31/2015
DOE 16.01.00 02/28/2016
DOE 16.01.01 05/11/2016
DOE 16.03.00 06/30/2016
DOE 16.03.00 09/30/2016
DOE 16.03.01 11/30/2016
DOE 16.04.00 12/30/2016
DOE 17.01.00 02/28/2017
DOE 17.02.00 06/30/2017

Press <ENTER> or F16 to Exit
```

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>Verify Release 17.02.00 displays.</td>
</tr>
</tbody>
</table>

The number of releases and the release installation date displayed may not correspond with the preceding screenshot example. This is acceptable as long as DOE 17.02.00 displays.

If Release 17.02.00 does not display, contact the Technology Management Customer Support Center for assistance.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>Select Enter.</td>
</tr>
<tr>
<td>6</td>
<td>Log off the PCGenesis server.</td>
</tr>
<tr>
<td>7</td>
<td>Verify users remain logged out of PCGenesis.</td>
</tr>
</tbody>
</table>
## B4. Perform a PCGenesis Full Backup After Release 17.02.00 is Installed

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Verify all users are logged out of PCGenesis.</td>
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<td>2</td>
<td>Close Uspool at the server.</td>
</tr>
<tr>
<td>3</td>
<td>Perform a PCG Full Backup to CD or DVD or Tape.</td>
</tr>
<tr>
<td>4</td>
<td>When the PCGenesis backup completes, label the backup CD or DVD or tape “Full System Backup After Release 17.02.00”.</td>
</tr>
</tbody>
</table>