

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

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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 <u>after</u> completing the June 2017 payroll(s). Install this release <u>before</u> 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 <u>first</u>, and 2) Run the Advance Leave (F3, F4, F2, F10) <u>second</u>. 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) <u>first</u> in order to capture FY 2017 leave totals for CPI reporting, and 2) Run the Automatic Leave Update (F3, F5, F3) <u>second</u> in order to clear the FY 2017 Fiscal Year leave totals.

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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 <u>pcgenesis@list.doe.k12.ga.us</u> 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 <u>is completed</u> 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:\UNIACU\SHELL 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 <u>is now up to current levels</u>, and the entire PCG software deck has been recompiled to take advantage of the upgraded AcuCobol runtime software.

<u>NOTE</u>: 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:\UNIACU\SHELL_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.

A1.2. PCGenesis Compatibility Issues – Windows Server 2000

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.

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A2. Payroll System

A2.1. Support New GA Department of Labor .csv File Format for Web Portal Uploads

Support has been added for the new Georgia Department of Labor Quarterly Wage <u>File Upload</u> 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 <u>two</u> 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.

CG Dist=8991 Rel=17.02.00 06/14/2017 PCW 002 SV C:\DEVSYS C:\SECOND WHITE	
Department of Labor Quarterly Dauroll Depart & Wagor	QTRMERG2
bepartment of Labor Quarterly rayroll Report & Wayes	
NOTE: If the 'Yes' radio button is selected, the csv file can be uploaded uia the internet to the DOL nortal instead of mailing the electronic med	ia.
Otherwise, the following electronic media file can be mailed to the DOL:	101
C: \SECUND \GUSEND \W13003304.WGS Location of magnetic media file. This file is snail-mailed	
to DOL Create DOL wage report to Load in Evcel?	1
C Yes	
or F10 to Browse for File Location of Excel.csv file.	
This file may be uploaded	
NOTE: DIRECTORY Must Already Exist portal.	
Enter=continue, F10=Browse	
	17.02.00
F16 F17 EP F18 TH	

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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.

Fiscal Year 2018	
TRS	
Employer Rate:	16.81%
Employee Rate:	6.00%

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.

PCG Dist=8991 Rel=17.02.00 06	5/29/2017 PCW 0	01 SV C:\DEVSY	S C:\SECOND	WHITE	
	Setup Pa	ayroll for a	New Payroll	Run	PAYDATE
Pauroll Month: JUNE	Sele	ct TRS Mass (Change Uptio	n	
For the payroll month of . TRS Service Indicator and	JUNE , do yo the Pay Reas	ou want the p son Code for	payroll setu ALL active	p to mass upo employees as	late BOTH the shown below?
Valid values: Y = Enter 'Y' to have the	payroll set	ıp mass chang	ge ALL activ	e employees t	o the values shown below.
N = Enter 'N' to NOT have Selecting 'N' will rec for employees on the (the payroll quire manual: Gross Data se	setup mass o Ly performing creen.	change ALL e g the mass u	mployees to t pdate or ente	the values shown below. ring the correct values
	June	July	Aug	Sept – May	
	Svc Reas	Svc Reas	Svc Reas	Svc Reas	
12 month employe	1 00	1 00	1 00	1 00	
11 month employe	1 00	0 91	1 00	1 00	
10 month employe	0 91 0 04	0 91 0 01	0 91 0 04	1 00	
aa woncu embroge	0 91		0 91	1 88	
Update JUNE ? (Y or N)	N	N	Ν	N	
TRS Service Indicator (0 or 1): 0 = No TRS Service Credit 1 = TRS Service Credit					
Pay Reason Code: 91 = Summer Accrued Pay 00 = Regular Pay					
ENTER = Continue, F16	= Exit				
ENTER F1 ▶ \$ F2 ◀ \$ F3 F4 F4	57 F6 A F7	Fo 🖬 Fo 🖊	F10 F11 E F12		F15 Q 17.02.00
			H	elp	

Setup Payroll - Select TRS Mass Change Option Screen

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The *Select TRS Mass Change Option* screen allows the user to decide whether or not to <u>mass change</u> the **TRS Service Indicator** and the *Gross Data* **Pay Reason** codes according 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 <u>active</u> 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 <u>off</u>, 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 <u>on</u>, 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 <u>off</u>, 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 <u>off</u>, 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 <u>on</u>, 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 <u>on</u>, 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 <u>active</u> 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 <u>any mass change</u> 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 <u>import</u> 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.

CG Dist=8991 Rel=17.02.00 06/22/2017 PCW 002 SV C:\DEVSYS C:\SECOND WHITE	
Import Selected Payroll Information	PAY17IMP
Identify Import File from Excel	
Import CPI Assignment Data or Payroll Data? C Import payroll data Import CPI assignment data	
Enter the Import file Path and Name (e.g. C:\IMPORT\IMPORTCCYYMMDD.CSV) or F10 to Browse for File	
C:\IMPORT\PAYIMP20170622.CSU	
Enter=Continue, F16=Exit	47 00 00
F10	17.02.00

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.

Step	Action
1	Verify all users are logged out of PCGenesis.
2	Close Uspool at the server.
3	Perform a PCG Full Backup to CD or DVD or Tape.
4	When the PCGenesis backup completes, label the backup CD or DVD or tape "Full System Backup Prior to Release 17.02.00 ".
5	Proceed to B2. Install PCGenesis Release 17.02.00.

B2. Install PCGenesis Release 17.02.00

FROM THE PCGENESIS SERVER

Step	Action
1	Verify all users are logged out of PCGenesis.
2	Open Windows® Explorer.
3	Navigate to the K:\INSTAL directory.
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 <i>Run as administrator</i> 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:

M	PCG Dist=8991 Current Release 16.04.00 0 03/17/2	:017	5V 8991 K:\!	SECOND ((Not Respon	ding)	_ 🗆 🗵
	Insta	11 PCGe	nesis Releas	e			Inst1PCG
		17.nr	i. n n				
	Installation Action		St	atus			
	PCGOS		2K	2008	I		
	PCGTYPE		SU				
	Check Previous Install		Co	ntinue	Install	ation	
	PCGenesis Status	_	No	Activ	e User	1	
	PCGUnzip	WinZip S	elf-Extractor - PC	GUNZIP.	ехе	×	
	Copy Files	To unzip folder pr	all files in PCGUNZI ess the Unzip button.	P.exe to th	he specified	Unzip	
	Conversion	Unzip to	<u>f</u> older:			Run <u>W</u> inZip	
	Finish Installation	K:MNST	AL		Browse	Close	
		I ⊻ <u>U</u> ver	write files without pro	mpting		About	
						<u>H</u> elp	
			Unz	ipping LVI	0100		
	Installation in Process						17 . nn.nn

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🔟 PCG Dist=8991 Current Release 16.04.00 0	03/17/2017 SV 8991	K:\SECOND	
	Install PCGenesis Re	lease	Inst1PCG
	17 . nn.nn		
Installation Acti	on 	Status	
PCGOS		2K 2008	
PCGTYPE		SU	
Check Previous In	stall	Continue Installation	
PCGenesis Status		No Active User	
PCGUnzip		Files Unzipped	
Copy Files		Files Copied	
Conversion		Conversion Completed	
Finish Installati	on 🤇	Installation Successful	
_ Any Key to Continue			17.nn.nn

For PCGenesis Release 17.02.00 successful installations, the following message displays:

Step	Action
6	Select Enter to close the window.
7	If the installation was successful: Proceed to B3. Verify Release 17.02.00 Was Successfully Installed.
	If the installtion was unsuccessful: Proceed to Step 8.

A problem message displays if an error occurred:

PCG Dist-8991 Current Release 15/muon 8 11/17/2011 SV 89	H KSECOND
Install PCGene	sis Release
17 . nn.	nn
Installation Action	Status
PCGOS	2K 2083
PCGTYPE	su
Check Previous Install	Continue Installation
PCGenesis Status	No Active User
PCGUnzip	Problem with PCGUN2IP.EXE
Copy Files	
Conversion	
Finish Installation	
Problem with UN2IP Process!! Call Help	Desk
Installation in Process	17.nn.nn

Step	Action
8	Select F16 to close the window.
9	Return to the MyGaDOE Web portal, and detach the files again.
10	Contact the Technology Management Customer Support Center for additional assistance if needed. A description of the error will display with instructions to call the Help Desk.

A warning message will display if the release installation is repeated:



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:

	PCG Dist=8991	Current Release 17.01.00 0 03/17/2017	SV 8991	K:\SECOND	
		Install PC	Conocic Ro	10200	Inst1PCG
		Install To	denesis ne	ICASC	
		17.	nn.nn		
		Installation Action		Status	
		PCGOS		2K 2008	
		PCGTYPE		SN NS	
		Check Previous Install		Continue Installation	
		PCGenesis Status		No Active User	
		PCGUnzip		Files Unzipped	
		Copy Files		Files Copied	
		Conversion		Conversion Completed	
		Finish Installation	<	Installation Successful	>
		ble Alwerdy Undeted			
	Release la	Die Aireaug opuaceu			
-	Any Key to	Continue			17 . nn.nn

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Step	Action
11	Proceed to B3. Verify Release 17.02.00 Was Successfully Installed.

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B3. Verify Release 17.02.00 Was Successfully Installed

Step	Action
1	Log into PCGenesis.
2	From the <i>Business Applications Master Menu</i> , select 30 (F30 - System Utilities).
3	From the <i>System Utilities Menu</i> , select 17 (F17 - Display Current Release Number).

The following screen displays:

PCG Dist=8991	Rel=17.02.00 06/14/2017 PCW 001 SV C:\DEVSYS C:\SECOND WHITE	
		DEFNRELM
	The Following D.O.E. Releases Have Been Successfully Loaded:	
	DOE 15.01.00 03/31/2015	
	DOE 15.03.00 09/30/2015	
	DOE 15.03.01 12/01/2015	
	DOE 16.01.00 03/31/2016	
	DOE 16.01.01 05/11/2016	
	DOE 16.02.00 06/30/2016 DOE 16 03 00 09/30/2016	
	DOE 16.03.01 11/30/2016	
	DOE 16.04.00 12/30/2016	
	DUE 17.01.00 03/31/2017 DUE 17.02.00 06/30/2017	
	Press <enter> or F16 to Exit</enter>	
		12.03.00

Step	Action
4	Verify Release 17.02.00 displays.
	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.
5	Select Enter.
6	Log off the PCGenesis server.
7	Verify users remain logged out of PCGenesis.

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B4. Perform a PCGenesis Full Backup After Release 17.02.00 is Installed

Step	Action
1	Verify all users are logged out of PCGenesis.
2	Close Uspool at the server.
3	Perform a PCG Full Backup to CD or DVD or Tape.
4	When the PCGenesis backup completes, label the backup CD or DVD or tape "Full System Backup After Release 17.02.00 ".

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