

# 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 Personnel System Master Menu.	D. Ochala
04/02/2015	2.7	15.01.00 – Moved documentation relating to the <i>Original Leave of Absence</i> <i>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/CS1</i> section.	D. Ochala
11/29/2010	2.3	10.03.01 – Updated Printing the Employee Leave Data Report section.	D. Ochala
10/04/2010	2.2	10.03.00 – Updated Automatic Leave Update section.	D. Ochala
07/06/2010	2.1	10.02.00 – Created Overview 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 <b>3</b> ( <b>F3</b> - Personnel System).

PCG Dist=899	1 Rel=15.02.00	07/13/2015 PCW 0	01 SV C:\DEVSYS	C:\SECOND	WHITE					
			Personnel	System		PERMENU				
FK	ey		Master M	enu						
1	Person	inel Update Menu								
4 5 6	Enhan Legacy Person	ced Substitute Pay ⁄ Lea∨e Menu inel Reports Menu	v and Leave Sys I	tem						
11 Employee Contract File Export12 Salary Projection Menu13 Special Functions Menu										
_2(	) File Re	organization								
Master <sup>User</sup> list						13.04.00				
F16 🕶 🖓 🖓 🖓	MONITOR MONITO									

Step	Action
2	Select <b>F5</b> ( <b>F5</b> – Legacy Leave Menu).

Personnel System     PER04P       FKey     Legacy Leave Menu       1     Print Employee Leave Data       3     Automatic Leave Update - By Pay Class       4     Update Job Code for CPI/Payroll/CS-1	PCG Dist=8991 Rel=15.01.00 04/02/	2015 PCW 002 SV C:\DEVSYS C:\SECOND	WHITE	
Fkey       Legacy Leave Menu         1       Print Employee Leave Data         3       Automatic Leave Update - By Pay Class         4       Update Job Code for CPU/Payroll/CS-1         Mater       Notice         Notice       Notice         Notice       Notice         Notice       Notice         Notice       Notice         Notice       Notice         Notice       Notice		Personnel System		PER04P
I Print Employee Leave Data     3 Automatic Leave Update - By Pay Class     4 Update Job Code for CPl/Payroll/CS-1      Netter	FKey 	Legacy Leave Menu		
3 Automatic Leave Update - By Pay Class 4 Update Job Code for CPI/PayrolI/CS-1 Matter Mention Mention Mention 14.83.80 14.83.80 tep Action	1 Print Employe	ee Leave Data		
4          Update Job Code for CPI/Payroll/CS-1           Master         Use         14.63.69	3 Automatic Lea	ave Update - By Pay Class		
Master       New List       14.03.00         Itep       Action	4 Update Job C	ode for CPI/Payroll/CS-1		
Master         Hereinst         14.63.60           tep         Action				
tep Action				
Master       Master       Master       Master       14.03.00         rec       Master       Master       Master       Master         tep       Action       Action       Action       Action				
Master     User     14.03.00       Tep     Action				
Master       User List       14.83.99         rsc       User Montrox       MONTROX         tep       Action				
Master     User     14.03.00       Master     User     Monitor       rt6     User     Monitor				
tep Action	Master UserList			14.03.00
tep Action				
	tep Action			
<b>3</b> Select <b>1</b> (F1 - Print Employee Leave Data).	3 Select 1 (F1 - Pri	nt Employee Leave Data).		

E PCG Dist=8991 Rel=13.02.00 07/24/2013 PCW 001 SV C:\DEVSYS C:\SECOND	WHITE	<u>_ 8 ×</u>
Print Employee Leave Data		PAYPE102
Use F10 to set the selection criteria for the Leave Filter set: TRS,Status	Listing.	
Select report sort order:       © Work location, Class, Name       © Employee Class, Work location, Name         © Work location, Name       © Employee Class, Name         © Work location, Employee Number       © Employee Class, Employee Number	© Employee Name © Employee Number	
Select print and export option: © Print BOTH STATE and LOCAL buckets C Print only STATE buckets C Print only LOCAL buckets		
Create Leave Detail File to Load in Excel? ⓒ No ○ Yes		
Enter the Export file Path and Name (e.g. C:\EXPORT\LEAVECYMD.CSV or F15 to Browse for File	)	
C:\EXPORT\LEAVE20130724.CSU		
NOTE: DIRECTORY Must Already Exist		
F10=Employee Selection, F15=Browse for Export File, F16=Exit Wit           F16=Exit W	hout Printing	12.03.00

Step	Action
4	To set specific search criteria: Select $\mathbf{F10}$ (F10 – Set filter condition). On the <i>Print Employees' Leave</i> – <i>Set Employee Selection Filter</i> screen, make the appropriate selections and entries. Verify <i>"Filter conditions set."</i> displays.
	Refer to the <u>Payroll System Operations Guide</u> , Section B: Payroll Update Processing, Topic 1: Set/Clear Employee Search Criteria for the instructions on limiting the report results to specific search criteria.
5	Select the radio button (•) to the left of the desired <b>Select sort order</b> option to identify the report's sort order.
6	Select the radio button (•) to the left of the desired <b>Select print and export options</b> to identify the leave buckets ( <b>State</b> and/or <b>Local</b> ) to print and/or export.
7	Select the radio button • to left of the appropriate response in the <b>Create Leave Detail File to Load in Excel?</b> 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	If creating an export file: Enter C:\EXPORT\LEAVEccyymmdd.csv in the Enter File Name and Path for Export File field, or select $F15 \otimes$ (F15 to browse for export file) to locate the file manually.				
10 Select (Enter).					
	<b>If creating an export file:</b> 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.				
	"Processing Request" briefly displays where appropriate.				

	PCG Dist=8991	Rel=15.01.00 04/02/2015 PCW 002 SV C:\DEVSYS C:\SECOND WHITE	- 0 ×
		Personnel System	PER04P
	FKey	Legacy Leave Menu	
	1	Print Employee Leave Nata	
	3	Automatic Leave Update - By Pay Class	
	4	Update Job Code for CPI/Payroll/CS-1	
Mast	Jap User <sub>11-4</sub>		14.03.00
F16	⊨ û®∋ Vord∋	PAY VEND	

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

## 1A. Employee Leave Data Report – Example

RE POR'	T DATE: 07/05/2012 T TIME: 13:58		EMPLO SORTE: Filte:	YEE I D BY r set	WORK	DATA RE LOCATIO atus	PORT - STAT N, NAME	E AND LOCAL	L BUCKETS			PAGE PROGRAM	1: 2 1: PAYPR10:
EMPNO	EMPLOYEE NAME	CLASS	WK LOC	JOB	STAT	SICK	PERSONAL	VACATION	OTHER	W/O PAY	STAFF	SCK BNK	
87862	CH3RCHILL, HA3RISON	01	0100	003	А	8.75	0.00	0.00	0.00	0.00	0.00	0.00	STATE BA
						0.00	0.00	0.00	0.00	0.00	0.00	0.00	STATE CU
						0.00	0.00	0.00	0.00	0.00	0.50	0.00	STATE YT
						0.00	0.00	0.00	0.00	0.00	0.00	0.00	LOCAL BA
						0.00	0.00	0.00	0.00	0.00	0.00	0.00	LOCAL CU
						0.00	0.00	0.00	0.00	0.00	0.00	0.00	LOCAL YT
9412	CH5ISTY, AL5A	08	0100	026	А	59.00	0.00	0.00	0.00	0.00	0.00	0.00	STATE BA
						0.00	0.00	0.00	0.00	0.00	0.00	0.00	STATE CU
						5.75	1.00	0.00	0.00	0.00	5.00	0.00	STATE YT
						0.00	0.00	0.00	0.00	0.00	0.00	0.00	LOCAL BA
						0.00	0.00	0.00	0.00	0.00	0.00	0.00	LOCAL CU
						0.00	0.00	0.00	0.00	0.00	0.00	0.00	LOCAL YT
7904	CH9ATE, CH9CK	01	0100	002	A	53.00	0.00	0.00	0.00	0.00	0.00	0.00	STATE BA
	,					0.00	0.00	0.00	0.00	0.00	0.00	0.00	STATE CU
						12.00	0.00	0.00	0.00	0.00	0.00	0.00	STATE YT
						0.00	0.00	0.00	0.00	0.00	0.00	0.00	LOCAL BA
						0.00	0.00	0.00	0.00	0.00	0.00	0.00	LOCAL CU
						0.00	0.00	0.00	0.00	0.00	0.00	0.00	LOCAL YT
8386	CR7SP AUGUSTINE	01	0100	00.3	А	14 00	0 00	0 00	0 00	0 00	0 00	0 00	STATE BA
	,					0 00	0 00	0 00	0.00	0 00	0.00	0.00	STATE CU
						1.00	0.00	0.00	0.00	0.00	1.00	0.00	STATE VT
						0 00	0 00	0 00	0 00	0 00	0.00	0.00	LOCAL BA
						0 00	0.00	0 00	0.00	0.00	0.00	0.00	LOCAL CU
						0 00	0.00	0.00	0.00	0.00	0.00	0.00	LOCAL VT

# 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.

PCG Dist=8991 Rel=15.02.00 07/13/2	2015 PCW 001 SV C:\DEVSYS C:\SECOND	WHITE	
	Personnel System		PERMENU
FKey 	Master Menu		
1 Personnel Upd	late Menu		
4 Enhanced Sub	stitute Pay and Leave System		
5 Legacy Leave	Menu		
<u>6</u> Personnel Rep	oorts Menu		
11 Employee Con	tract File Export		
12 Salary Projecti 13 Special Euroti	ion Menu		
	DIIS MICHU		
20 File Reorganiz	ation		
aster UserList			13.04.00
Action			

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PCG Dist=8991	Rel=15.01.00 04/02/2015 PCW 00	02 SV C:\DEVSYS C:\SECOND	WHITE	
		Personnel System		PER04P
FKe	у -	Legacy Leave Menu		
1	📕 Print Employee Leave Da	ta		
3	Automatic Leave Update	- By Pay Class		
4	Undate Job Code for CPU	Payroll/CS-1		
		ayronyca-r		
Master <sup>User</sup> List				14.03.00
				]
Action				
Select	F3 (F3 - Automatic	Leave Undate: Ry Day	(Class)	
Select	F3 (F3 - Automatic	: Leave Update: By Pay	r Class).	

📒 PCG Dist=8991 Rel=13.02.00	07/24/2013 PCW 0	01 SV C:\DEVSYS C:\SECOM	ND WHITE	_ 8
A A	utomatic Leave	Update By Pay Class		PER 005 0
inis p	rogram will aut	comatically update le	ave data for:	
State or lo	ical (Sort	.)		
Pay class(e	s):			_
				_
			May Daus to be	
			Accumulated	
Sick Leave	daus to	be credited: .00	999.99	
Other	daus to	be credited: .00	999.99	
Without Pay	ı daysto	be credited: .00	999.99	
Personal Bu	siness 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	
	Drop unused day	s Add unused to	sick bal	
Sick Leave	(1711)	(174	')	
Other	N N	N		
Without Pau	Ň	Ň		
Personal Business	; <u>N</u>	N		
Vacation	Ň	Ň		
Staff Development	: <u>N</u>	N		
Sick Bank	N	N		
	ENTER = Cor	itinue, F16 = Exit w	vithout Updating	12.04.00
p 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 <b>pay class</b> fields to choose the pay class or classes to update. Up to twenty (20) pay classes may be updated at the same time, provided the same leave parameters apply to each class.
5	Enter the number of days <u>added</u> to the leave type in the appropriate <b>days to be credited:</b> fields.
6	Enter the maximum number of days allowed for accrual in the <b>Max Days to be</b> <b>Accumulated</b> (Maximum Days to be Accumulated) columns, where appropriate. A value of <b>999.99</b> indicates that the accumulation of days is unlimited for the corresponding leave type.
7	<ul> <li>To <u>delete</u> the existing accumulated leave totals and to begin with the number of days entered in <i>Step 5</i>: Enter Y (Yes) in the Should YTD leave totals be cleared? field and proceed to <i>Step 8</i>.</li> <li>To <u>add</u> the number of days entered in <i>Step 5</i> 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>.</li> </ul>

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

	PCG Dist=8991	Rel=15.01	.00 04/02/2	2015 PCW	002 SV (	C:\DEVS1	/S C:\S	ECOND	)	v	VHITE		_ 0	x
					Pers	sonnel	Syst	em					PER04P	
	FKey	,			Lega	acy Le	ave M	enu						
	1	Prin	t Employe	e Leave D	ata									
	3	Auto	matic Lea	ve Update	: - By Pa	y Clas	S							
	4	] Upd	ate Job Co	de for CP	l/Payroll	/CS-1								
Mas	ter <sup>User</sup> list												14.03.	00
F16	⊨ (P3 Vog	PAY MONITOR	END											

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

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

## \* \* \* \* \* ATTENTION \* \* \* \* \*

Perform this procedure <u>after</u> the June payroll and before changing Personnel assignments in CPI and Personnel Data for the new school year. The job code indicated as the <u>first</u> 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.

PCG Dist=8991	Rel=15.02.00 07/13/2015 PCW 001 SV C:\DEVSYS C:\SECOND WHITE	
	Personnel System	PERMENU
FKe	y Master Menu -	
_1	Personnel Update Menu	
4 5 6	<ul> <li> Enhanced Substitute Pay and Leave System</li> <li> Legacy Leave Menu</li> <li> Personnel Reports Menu</li> </ul>	
11 12 13	Employee Contract File Export Salary Projection Menu Special Functions Menu	
20	File Reorganization	
Master <sup>User</sup> list F16 12 12 Word	PACY MONTOR         MONTOR         Image: Control of the second se	13.04.00
Action		
Select	<b>F5</b> ( <b>F5</b> - Legacy Leave Menu).	

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E F	CG Dist=8991 Rel=15.01.00 04/02/	/2015 PCW 002 SV C:\DEVSYS C:\SECOND	WHITE	
		Personnel System		PER04P
	FKey 	Legacy Leave Menu		
	1 Print Employe	ee Leave Data		
	3 Automatic Lea	ave Update - By Pay Class		
	4 Update Job C	ode for CPI/Payroll/CS-1		1
	Hen.			14 63 66
Master				14.03.00
		· · · · · · ·		
	Action			

2	PCG Dist=8991 Rel=19.02.00 07/01/2019 PCG 002 SV C:\DEVSYS C:\SECOND WHITE - □ ×
-	CC1DUIDD
	Update Job Code for CPI/Payroll/CS-1
	The first CPI assign job code will be transferred to the CS-1 Job on the personnel record.
	"Current Year Contract Months" will be transfered to "Prior Year Contract Months".
ENT	ENTER=Continue, F16=Exit
ENT	ENTER=Continue, F16=Exit
ENTI F16	ENTER=Continue, F16=Exit 19.02.00
ENTI F16	ENTER=Continue, F16=Exit 19.02.00 Action
ENTI F16	ENTER=Continue, F16=Exit 19.02.00 Action
ENTI F16	ENTER=Continue, F16=Exit       19.02.00         Image: Select       Image: Select         Image:
ENT F16	ENTER=Continue, F16=Exit       19.02.00         Image: Select interval       Image: Select interval         Image: Select interval       (ENTER) to update the CS-1 Job (From CPI) field on the employed personnel record, and to transfer the Current Year Contract Months field's entremplated in the interval
ENT F16	ENTER=Continue,       F16=Exit       19.02.00         Action       Select       Image: Select       Image: Select       Image: Select       Image: Select       Select       Image: Select       Image: Select       Select       Image: Select       Image: Select       Image: Select       Select       Image: Select       Select       Image: Select
ENT F16	ENTER=Continue,       F16=Exit       19.02.00         Image: Select       Ima
ENT F16	ENTER=Continue,       F16=Exit       19.82.88         Action       Action       Select       Image: Select       Image: Select       Image: Select       Image: Select       Select       Image: Select       Im
ENT F16	ENTER=Continue,       F16=Exit       19.82.88         Image: Select       Ima
ENT F16	ENTER-Continue, F16-Exit       19.02.00         Action       Select IMEN (ENTER) to update the CS-1 Job (From CPI) field on the employed personnel record, and to transfer the Current Year Contract Months field's entre Prior Year Contract Months field on the employee's personnel record.         "Updating Payroll File with Job Code" briefly displays.         The Personnel System Legacy Leave Menu redisplays.
ENT F16	ENTER-Continue, F16=Exit       19.82.88         Action       Select Internet (ENTER) to update the CS-1 Job (From CPI) field on the employed personnel record, and to transfer the Current Year Contract Months field's entre Prior Year Contract Months field on the employee's personnel record.         "Updating Payroll File with Job Code" briefly displays.         The Personnel System Legacy Leave Menu redisplays.         Select Internet (F16 - Exit) to return to the Personnel System Master Menu, or select)