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"Making Education Work for All Georgians"

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MEMORANDUM

TO: PCGenesis System Administrators

FROM: Steven Roache, Senior Information Systems Manager

SUBJECT: Release 13.01.00 – Miscellaneous Updates / Installation Instructions

This document contains the PCGenesis software release overview and installation instructions for *Release 13.01.00*.

PCGenesis supporting documentation is provided at:

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

==March, 2013 Payroll Completion Instructions==

*Install this release **after** completing the March 2013 payroll(s). Install this release **before** executing F4 – Calculate Payroll and Update YTD for the April 2013 payroll.*

Contents

Section A: Overview of Release

A1. Payroll System

A1.1. New Georgia Health Insurance (GHI) Premium for Certified Employees for March 2013 (for April 2013 Coverage)

The Board of Community Health has approved an increase in the flat monthly employer contribution rate beginning in March 2013 (for April coverage) for certificated personnel. The new flat rate is set at **$937.34** per covered member. This increase was approved based on the Governor's Amended Fiscal Year 2013 Budget Recommendation, which calls for increasing the employer contribution rate to $937.34, effective March 2013. This release <u>automatically</u> updates the GHI rates into PCGenesis, if the rate hasn't been updated already.

A1.2. SHBP File Layout Changes

The State Health Benefit Plan (SHBP) has partnered with Automatic Data Processing, Inc. (ADP) for an outsourced year round enrollment solution and call center to be available 8/1/2013. Through this partnership, State of Georgia employees and agencies will benefit from having a paperless 24/7 rules based enrollment portal and fully staffed call center for employee questions.

Therefore, PCGenesis has been updated to support the required changes to the MPPI file layout. A brief summary of the changes are outlined below.

- AUF and PLEE files now contain address and e-mail fields.
- AUF file now contains a new record type of '**MISC**' to capture miscellaneous changes including updates to the employee name, address, city, state, zip code, phone #, e-mail address, salary, and hours scheduled per week.
- All file lengths have been extended to include additional information: employee's e-mail address, ethnicity and primary language.

Currently, SHBP receives from payroll support systems the PLEE, AUF, and PUF but not on a consistent or accurate basis. Going forward, timely submissions in the proper format will be required. In order to prepare for this transition, districts will need to:

- Begin sending PLEE File (monthly)
- Begin sending AUF File (daily)
- Continue sending PUF File (monthly)

The SHBP is requesting all vendors to update their file program and make available to payroll locations by 4/1/2013. With release 13.01.00, PCGenesis supports the **"FILES"** method of data entry for SHBP.

A1.3. Print Manual Checks

The *Print Manual Check* (F2, F3, F9, F13) feature has been added to the *Manual/Void Check and Direct Deposit Menu*. It is now possible to print a manual check.   The *Print Manual Check* feature displays a list of all manual checks and direct deposits which have been keyed into the system. The procedure does not allow direct deposits to be printed, but will allow the user to print <u>one</u> manual check at a time. A manual check can be printed by simply entering a ☑ (check mark) in the box next to the manual check. The normal check printing process then proceeds and includes the ability to enter a message to print on the check.

A1.4. Allow the Pension Code Entry on Manual Payroll Checks/Direct Deposits

It is now possible to enter a **Pension Code** on a manual check or direct deposit on the *Enter Manual Check/Direct Deposit* screen (F2, F3, F9, F9). Before, it was NOT possible to override the **Pension Code** on the manual check, and the system always used the **Pension Code** defined for the employee on the employee's *Gross Data* screen. This restriction made it very difficult to correct pension mistakes made in prior payrolls. Now, even if the employee's *Gross Data* screen has been updated with a new **Pension Code**, but the user needs to refund a pension amount taken for a different **Pension Code** in a prior payroll, this can be accomplished in one payroll run.

A1.5. Add E-Mail Address, Cell Phone Number, Background-Check Date, and Leave Reason Maximum to Export/Import Selected Payroll / Deduction / CPI Information

Support has been added to the *Export Selected Payroll/Deduction/CPI Information* (F2, F13, F8, F5) and the *Import Selected Payroll Information* (F2, F13, F8, F6) features for the export/import of additional payroll fields. The user is now allowed to select the **Leave Reason Max**, **Background-Chk Date**, **Employee E-mail**, and the **Cell Phone** fields for export from the *Payroll File*.

Selecting the **Export File Type** of '**I**' (Create File to Modify and Import) during the export process allows the user to create an export file which, after user modifications to the data have been made, can then be imported back into the *Payroll File* data. This process will facilitate loading employee e-mail addresses, cell phone numbers and background-check date fields. It will also facilitate loading the **Leave Reason Maximum** field which is needed for the *Enhanced Substitute Pay and Employee Leave System*.

A1.6. Update the Detailed Pay Check Stub to Include the LOCAL Leave Amounts

The detailed pay check stub has been updated to include LOCAL leave amounts on the check. Before, two columns were available under the *Paid Time Off* section which were designated as '*Future 1*' and '*Future 2*'. Now, the *Paid Time Off* section includes room for additional leave categories. See the illustration of the *Paid Time Off* section below:

| Paid Time Off | | | | | | | | Employer Paid Benefits | | |
Lv Type 1	Cur 1	YTD 1	Bal 1	Lv Type 2	Cur 2	YTD 2	Bal 2	Description	Current	YTD
XXXXXXXXXXX	999.99	999.99	999.99	XXXXXXXXXXX	999.99	999.99	999.99	XXXXXXXXXXXX	99999.99	99999.99
XXXXXXXXXXX	999.99	999.99	999.99	XXXXXXXXXXX	999.99	999.99	999.99	XXXXXXXXXXXX	99999.99	99999.99
XXXXXXXXXXX	999.99	999.99	999.99	XXXXXXXXXXX	999.99	999.99	999.99	XXXXXXXXXXXX	99999.99	99999.99
XXXXXXXXXXX	999.99	999.99	999.99	XXXXXXXXXXX	999.99	999.99	999.99	XXXXXXXXXXXX	99999.99	99999.99
XXXXXXXXXXX	999.99	999.99	999.99	XXXXXXXXXXX	999.99	999.99	999.99	XXXXXXXXXXXX	99999.99	99999.99

A1.7. Employee Direct Deposit Listing – New Export Option

The *Employee Direct Deposit Listing* (F2, F8, F13) has been updated to allow the user to create a .csv file export. The *Employee Direct Deposit Listing* now allows the option of producing a comma separated export file (.csv file) in addition to the printed report. The export file contains the same information that prints on the report, but puts the data into a data file. This allows users to perform data analysis on the employee direct deposit data by using spreadsheet capabilities. Producing the export file is optional, but the report will always be produced.

A1.8. Employer Copy of W2's

The *Print Employer's Copy of W-2's* (F2, F5, F6) has been updated to allow grand total amounts of up to $99 million to print. Previously, there was not enough space to print all the figures for the health insurance cost on the totals page of the employer's W-2's. For example, when the total was over $15 million, only $1+ million was displayed on the totals page. This problem has been corrected, and the employer W-2's will now allow printing of amounts up to $99 million.

A1.9. Gross Data Import

A problem has been fixed with the *Gross Data Import* (F2, F13, F8, F2). Before, if an employee's name was very long, the *Gross Data Import* procedure would incorrectly give an "*EMPLOYEE NAME MISMATCH*" error. This problem has been corrected.

A1.10. PSERS Contribution Report and File

A problem has been fixed with the *PSERS Contribution Report and File* (F2, F5, F10). Before, a voided check was not picked up for the report if the check date was from a prior period. Now, the program checks the transaction date instead of the check date when determining whether or not the voided payment should be included on the monthly report.

Also, a problem has been corrected with the *PSERS Contribution Report* page totals. Before, the page totals were not correct. This problem has been fixed.

A2. Personnel System

A2.1. Enhance the Substitute Pay & Employee Leave System to Allow Entry of Substitute Data When There is No Absent Employee

The new *Enhanced Substitute Pay and Employee Leave System* has been enhanced so that substitute pay can be entered using the new system, even when there is <u>not</u> an absent employee. Before, if a substitute was used by the district, but the substitute did not replace an employee who was on leave, the substitute's pay had to be entered in payroll using the *Update/Display Gross Data* screen. This made it difficult to run substitute pay reports in the *Enhanced Substitute Pay and Employee Leave System* which included ALL substitute pay.

Now, users are able to enter the substitute pay, even when there is no absent employee on the *Input Employee Leave and Substitute Pay* screen (F3, F4, F2, F1). This will facilitate verifying the substitute pay reports since <u>all</u> substitute pay can now be entered into the new system. An example of the updated leave entry screen is shown below:

A2.2. Leave Import for the Substitute Pay & Employee Leave System

The new *Enhanced Substitute Pay and Employee Leave System* has been enhanced so that substitute pay can be entered using the new system, even when there is <u>not</u> an absent employee. Now, users are able to <u>import</u> the substitute pay, even when there is no absent employee on the import file when using the *Import Leave Input Data* (F3, F4, F2, F2) process. This will facilitate verifying the substitute pay reports since <u>all</u> substitute pay can now be entered into the new system.

Several fields have been added to the import file layout for 'Substitute Only' records. The **Process Type** field, the **Pay Type** field, and the **Pay Rate** field have been added at the end of the import file layout. When the absent employee number is <u>zeroes</u> in the import file, the system will use the **Process Type**, **Pay Type**, and **Pay Rate** fields, in addition to the **Override General Ledger Account Number**, on the import file to populate the substitute's gross data lines.

A2.3. Provide Employee-Specific Maximum for Leave Reason Codes in the Enhanced Substitute Pay & Employee Leave System

The *Enhanced Substitute Pay and Employee Leave System* has been enhanced so that when defining a leave reason code, the user is able to specify <u>variable</u> maximum allotments, depending on the employee. For example, a district leave policy may provide that some employees are allotted a maximum of 3 days of personal leave, other employees may be allowed 4 days of personal leave, and still other employees may be allowed 5 days of personal leave. In order to accommodate this situation, a new option has been added to the *Maintain Leave Reason Code* screen (F3, F4, F1, F2). For the parameter, **Maximum Days to Take for Leave Reason?**, three options are possible:
- Yes, one maximum defined below
- Yes, employee maximum defined on PERSONNEL rec
- No, no maximum

A new field has been added to the *Update/Display Personnel* screen (F2, F2, F2) to define the employee maximum. The **Leave Reason Max** has been added to the *Update/Display Personnel* screen for use with the **Maximum Days to Take for Leave Reason?**. When the **Maximum Days to Take for Leave Reason?** is set to '*Yes, employee maximum defined on PERSONNEL rec*', the system will check the value in the employee's **Leave Reason Max** field to determine how much time they are allowed to take.

A2.4. Substitute Leave Detail Reports

A problem with the *Substitute Leave Detail Report – Current Leave Input File Only* (F3, F4, F3, F3) has been corrected. Before, incorrect leave history data was printed on the report when a specific date range was requested. This problem has been fixed.

A2.5. Employee Leave Detail Reports

The *Employee Leave Detail Report* (F3, F4, F3, F2 or F6 or F10) has been enhanced to offer an additional option. An option has been added which will allow the user to print the memo field on the report. This will provide users with additional information about the leave request on the *Employee Leave Detail Report*.

A2.6. Add Cell Phone Number, Background Check Date, and Leave Reason Maximum to Personnel Screen

Several new fields have been added to the *Update/Display Personnel* screen (F2, F2, F2). The user is now allowed to enter the employee's **Background-Check Date** and the employee's **Cell Phone Number** fields into the *Payroll File*. Also, the **Leave Reason Max** has also been added to the *Update/Display Personnel* screen for use with the new *Enhanced Substitute Pay and Employee Leave System*.

A2.7. Add Employee E-mail Address to Emergency Contact Data Screen

A new field has been added to the *Update/Display Emergency Data* screen (F3, F2). The user is now allowed to enter the employee's e-mail address (**Employee e-mail)** into the *Personnel File*. This field will be extracted for the updated SHBP file layouts.

A3. Certified/Classified Personnel Information (CPI) System

A3.1. Add E-mail Address, Cell Phone Number and Background Check Date to Third Party Contractor Screen

Several new fields have been added to the *Update/Display Third Party Contractors* screen (F4, F2). The user is now allowed to enter the third party contractor's e-mail address, background-check date, and cell phone number fields into the *Payroll File*.

```
PCG Dist=8991  Rel=13.01.00  03/13/2013 PCW 001   C:\DEVSYS  C:\SECOND        WHITE                      _|&|X|
                         Display/Update Third Party Contractors                              PAY3RD
Status  A -- Active        AR9STEAD, TA9HINA
Emp. no. 88944        Pay Loc  8010  Location 008010      Class  19   THIRD-PARTY CONTRA
Sex Code     F        Work Loc 8010  Location 008010      Job    119  THIRD-PARTY CONTRA
Mar Stat     M            SSN 999 08 8944

NAME First  TA9HINA_____      Middle _____
     Last  AR9STEAD_____  Suffix _____  Prefix _____

Address     2070 MAIN STREET_____          Certificate Type    B0
Address L2  _____         CS1 Job (from CPI)  482
City/State  SMITH_____, GA           Include on CPI ?    Y
Zip Code    33333_____   County 160             EEO-5 Ethnic code   _2  WHITE
Phone      (999)555-1056  Out of State
Cell phone (___)000-0000                        Hispanic/Latino Ethnicity?
                                                  ○ Yes ◉ No
Birth Date    12/01/1970
Hire Date      8/01/2006                        Race (Select all that apply)
Rehire Date  _____                           ○ Yes ◉ No Am Indian Alaskan
Background Ck _____                           ○ Yes ◉ No Black
Term Date    _____                           ◉ Yes ○ No White
Term Reason   _                                   ○ Yes ◉ No Asian
                                                  ○ Yes ◉ No Hawaiian Pacific

E-mail addr   TAR9STEAD@DISTRICT.K12.GA.US_____

   NOTE:  To HIRE a third party contractor as an employee, use 'Add New Employee' in Payroll.
          Enter the contractor employee number, and then change the class code to a payroll class.
          Otherwise, third party contractors CANNOT be accessed from Payroll.


ENTER✓  F1➡ F2⬅ F3🖨 F4 F5 F6 F7 F8💾 F9 F10 F11 F12 CREATE F13      F15🔍      13.01.00
F16⬅ F17 F18🗑                                          Help
```

A3.2. CPI Certificate Assignment Summary Screen

The *CPI Certificate Assignment Summary Screen* (F4, F1 or F4, F11) now requires that the **Assignment Percentages** for each of the six assignments add up to <u>exactly</u> 100 percent. Before, PCGenesis would round the total up to 100 percent, when the actual percentages totaled 99 or above. This would cause an error when uploading the assignment data to the MyGaDOE portal. This problem has been corrected.

A4. Financial Accounting and Reporting (FAR) System

A4.1. Vendor Maintenance

A new field has been added to the *Vendor Maintenance* screen (F1, F14, F1) which allows third party vendors, such as SoftDocs, to deliver purchase orders by either fax or e-mail instead of printing the purchase orders from within PCGenesis. The **PO Output** field defines the vendor's preferred method for receiving purchase orders.

Valid options are:

> **E** – E-mail, only valid when using a 3rd party to deliver purchase orders
> **F** – Fax, only valid when using a 3rd party to deliver purchase orders
> **O** – Other, valid when PCGenesis is used to print purchase orders

A4.2. Enter Purchase Order

A new field has been added to the *Enter Purchase Order* screen (F1, F2, F2) which, when this feature is implemented in a future release, will allow third party vendors, such as SoftDocs, to deliver purchase orders by either fax or e-mail instead of printing the purchase orders from within PCGenesis. The **PO Output** field defines the vendor's preferred method for receiving purchase orders. PCGenesis release 13.01.00 updates the *Enter Purchase Order* screen with the **PO Output** field, but this field will be implemented in a future release and is not currently utilized.

Valid options are:

> **E** – E-mail, only valid when using a 3rd party to deliver purchase orders
> **F** – Fax, only valid when using a 3rd party to deliver purchase orders
> **O** – Other, valid when PCGenesis is used to print purchase orders

The **PO Output** value on the purchase order defaults to the value defined on the vendor's record in *Vendor Maintenance*, but the value can be overridden on the purchase order, if desired.

Also, another new field has been added to the *Enter Purchase Order* screen (F1, F2, F2) which allows the user to enter a "ship to" facility and building which is different from the "bill to" facility and building. This allows the purchase order items to be shipped to one location, such as a school, but allows the billing to go to another location, such as the central office. Whereas the "ship to" facility and building information is required information, the "bill to" information is optional. The **Bill To Facility** and **Building** field entries must be valid entries in the *Facility/Building File*. PCGenesis release 13.01.00 updates the *Enter Purchase Order* screen with the **Bill To Facility** and **Building** fields, but these fields will be implemented in a future release and are not currently utilized.

A4.3. Import Purchase Order

A new field has been added to the import process of the *Enter Purchase Order* screen (F1, F2, F2) which allows the user to enter a "ship to" facility and building which is different from the "bill to" facility and building. This allows the purchase order items to be shipped to one location, such as a school, but allows the billing to go to another location, such as the central office. The purchase order entry .csv import file format has been updated to include a '**B**' line for the **Bill To Facility** and **Building** fields. Whereas the "ship to" facility and building information is required information, the "bill to" information is optional. The **Bill To Facility** and **Building** field entries must be valid entries in the *Facility/Building File*. PCGenesis release 13.01.00 updates the import process with the **Bill To Facility** and **Building** fields, but these fields will be implemented in a future release and are not currently utilized.

Also, the import process will now load the **Vendor Fax Number** from the '**N**' line of the .csv import file. The vendor fields are loaded into the system if a <u>new</u> vendor number is requested by entering the keyword '**NEW**' in the **Vendor Number** field in the .csv import file. The **Vendor Fax Number** is a new field available on the VENDOR record and can now be populated when creating a new vendor during the *PO Import* process.

A4.4. Add Selection Options to Allow Include and Exclude Range of Accounts

In order to facilitate printing vendor payment reports, many menu options on the *Vendor Payments for Any Period Menu* (F1, F9, F1, F1) have been updated with new print options. Now, the user will be able to specify include and exclude ranges for each piece of the GL account number so that a subset of the entire report can be printed. This will make it easier for users to review the reports, and will also save paper by generating shorter reports. The following options have been updated on the *Vendor Payments for Any Period Menu* (F1, F9, F1, F1):

- *By Fund, Detail and Summary* (F1 and F2)
- *By Account, Detail and Summary* (F5 and F6)
- *By Facility, Detail and Summary* (F9 and F10)
- *By Fund and Program, Detail and Summary* (F11 and F12)
- *By Vendor, Detail and Summary* (F13 and F14)

An example of the new range options is shown below:

```
PCG Dist=8991  Rel=13.01.00  02/28/2013  PCW 001    C:\DEVSYS  C:\SECOND        WHITE                _|_|X|
                                                                                          VEND0130
                              Vendor Detail by Account

                        Enter period of vendor payments to be printed:

                          _____  thru  _____

          Enter Account Nbr or Part of Account Nbr:

                                                 Optional   Optional   Optional
                                         Include - Range    Exclude - Range
              (00     = All Years    )    00    -  00        00    -  00
              (000    = All Funds    )    000   -  000       000   -  000
              (0      = All Fiscal   )    0     -  0         0     -  0
              (0000   = All Programs )    0000  -  0000      0000  -  0000
              (0000   = All Functions)    0000  -  0000      0000  -  0000
              (00000  = All Objects  )    00000 -  00000     00000 -  00000
              (0000   = All Facilities)   0000  -  0000      0000  -  0000
              (0      = All Buildings )   0     -  0         0     -  0
              (000000 = All Additional)   000000 - 000000    000000 - 000000

                        (Leave All ZEROS to Print All)

                  Enter vendor #, if only 1 vendor is to be printed:

                      999999   (999999 = All vendors)




                          ENTER = Continue, F16 = Exit
  ENTER                                                              F15          13.01.00
  F16
```

A4.5. Vendor Payments for Any Period – New Export Options

All menu options on the *Vendor Payments for Any Period Menu* (F1, F9, F1, F1) have been updated to allow the user to create a .csv file export. All options on the *Vendor Payments for Any Period Menu* (F1, F9, F1, F1) now allow the option of producing a comma separated export file (.csv file) in addition to the printed report. The export file contains the same information that prints on the report, but puts the data into a data file. This allows users to perform data analysis on the vendor payments data by using spreadsheet capabilities. Producing the export file is optional, but the report will always be produced.

A4.6. Budget and Revenue Account Activity Detail – New Export Options

Two menu options on the *Budget and Revenue Account Master Reports Menu* (F1, F9, F3) have been updated to allow the user to create a .csv file export. The *Budget Master: Account Activity Detail List* function (F1) and the *Revenue Master: Account Activity Detail List* function (F8) now allows the option of producing a comma separated export file (.csv file) in addition to the printed report. The export file contains the same information that prints on the report, but puts the data into a data file. This allows users to perform data analysis on the budget and revenue account activity data by using spreadsheet capabilities. Producing the export file is optional, but the report will always be produced.

A4.7. Print Facility/Building File – New Export Option

The *Print Facility/Building File* (F1, F2, F12, F5) has been updated to allow the user to create a .csv file export. The *Facility/Building Report* now allows the option of producing a comma separated export file (.csv file) in addition to the printed report. The export file contains the same information that prints on the report, but puts the data into a data file. This allows users to perform data analysis on the facility/building data by using spreadsheet capabilities. Producing the export file is optional, but the report will always be produced.

A5. PCGenesis System Enhancements
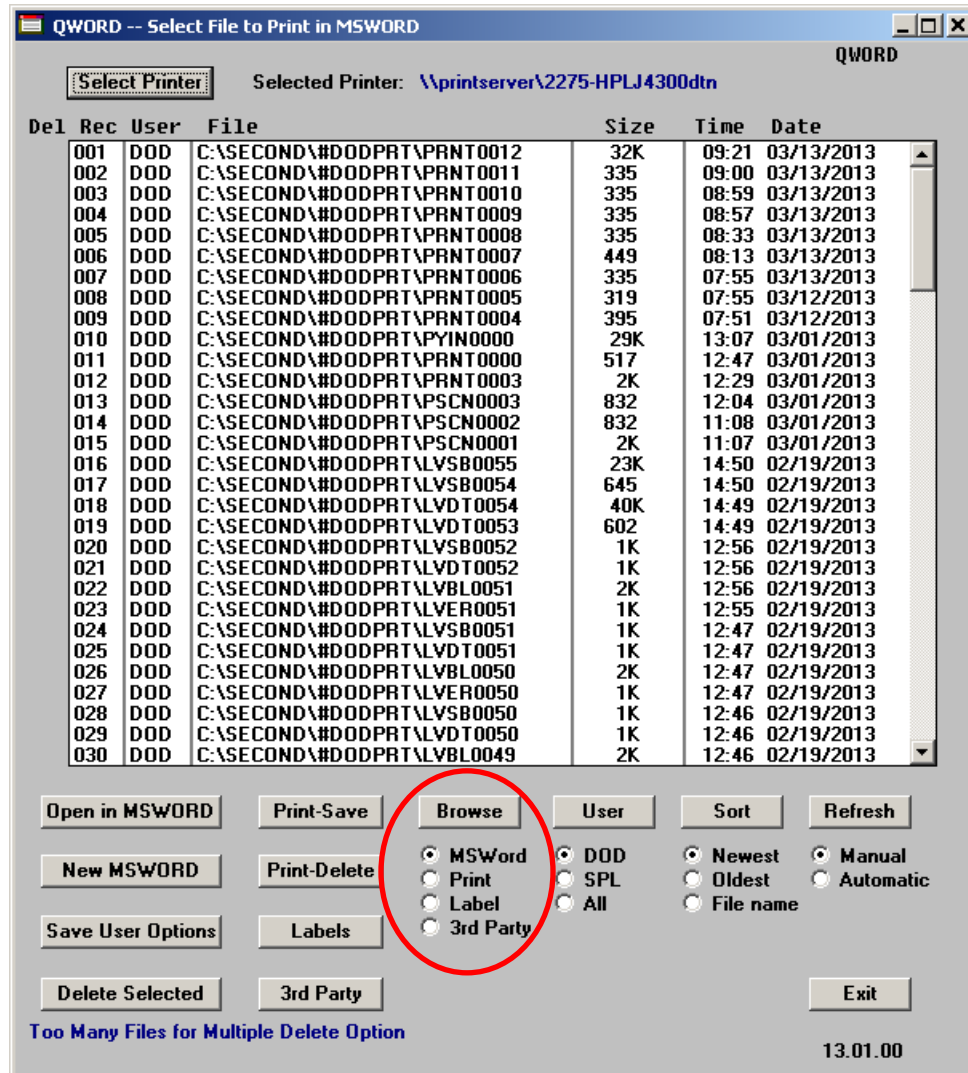
A5.1. New Features for the Microsoft® Word Print Queue

The *Browse* feature has been enhanced in the *PCGenesis Microsoft® Word Print Queue* (accessed via the [Word] button from any PCGenesis menu).

```
QWORD -- Select File to Print in MSWORD                                    _ □ ×
                                                                       QWORD
      Select Printer     Selected Printer:  \\printserver\2275-HPLJ4300dtn

Del Rec User  File                              Size   Time   Date
    001  DOD   C:\SECOND\#DODPRT\PRNT0012        32K   09:21  03/13/2013
    002  DOD   C:\SECOND\#DODPRT\PRNT0011        335   09:00  03/13/2013
    003  DOD   C:\SECOND\#DODPRT\PRNT0010        335   08:59  03/13/2013
    004  DOD   C:\SECOND\#DODPRT\PRNT0009        335   08:57  03/13/2013
    005  DOD   C:\SECOND\#DODPRT\PRNT0008        335   08:33  03/13/2013
    006  DOD   C:\SECOND\#DODPRT\PRNT0007        449   08:13  03/13/2013
    007  DOD   C:\SECOND\#DODPRT\PRNT0006        335   07:55  03/13/2013
    008  DOD   C:\SECOND\#DODPRT\PRNT0005        319   07:55  03/12/2013
    009  DOD   C:\SECOND\#DODPRT\PRNT0004        395   07:51  03/12/2013
    010  DOD   C:\SECOND\#DODPRT\PYIN0000        29K   13:07  03/01/2013
    011  DOD   C:\SECOND\#DODPRT\PRNT0000        517   12:47  03/01/2013
    012  DOD   C:\SECOND\#DODPRT\PRNT0003        2K    12:29  03/01/2013
    013  DOD   C:\SECOND\#DODPRT\PSCN0003        832   12:04  03/01/2013
    014  DOD   C:\SECOND\#DODPRT\PSCN0002        832   11:08  03/01/2013
    015  DOD   C:\SECOND\#DODPRT\PSCN0001        2K    11:07  03/01/2013
    016  DOD   C:\SECOND\#DODPRT\LVSB0055        23K   14:50  02/19/2013
    017  DOD   C:\SECOND\#DODPRT\LVSB0054        645   14:50  02/19/2013
    018  DOD   C:\SECOND\#DODPRT\LVDT0054        40K   14:49  02/19/2013
    019  DOD   C:\SECOND\#DODPRT\LVDT0053        602   14:49  02/19/2013
    020  DOD   C:\SECOND\#DODPRT\LVSB0052        1K    12:56  02/19/2013
    021  DOD   C:\SECOND\#DODPRT\LVDT0052        1K    12:56  02/19/2013
    022  DOD   C:\SECOND\#DODPRT\LVBL0051        2K    12:56  02/19/2013
    023  DOD   C:\SECOND\#DODPRT\LVER0051        1K    12:55  02/19/2013
    024  DOD   C:\SECOND\#DODPRT\LVSB0051        1K    12:47  02/19/2013
    025  DOD   C:\SECOND\#DODPRT\LVDT0051        1K    12:47  02/19/2013
    026  DOD   C:\SECOND\#DODPRT\LVBL0050        2K    12:47  02/19/2013
    027  DOD   C:\SECOND\#DODPRT\LVER0050        1K    12:47  02/19/2013
    028  DOD   C:\SECOND\#DODPRT\LVSB0050        1K    12:46  02/19/2013
    029  DOD   C:\SECOND\#DODPRT\LVDT0050        1K    12:46  02/19/2013
    030  DOD   C:\SECOND\#DODPRT\LVBL0049        2K    12:46  02/19/2013

  Open in MSWORD    Print-Save      Browse       User        Sort      Refresh

                                   ● MSWord   ● DOD    ● Newest    ● Manual
  New MSWORD       Print-Delete    ○ Print    ○ SPL    ○ Oldest    ○ Automatic
                                   ○ Label    ○ All    ○ File name
  Save User Options    Labels      ○ 3rd Party

  Delete Selected     3rd Party                                    Exit
Too Many Files for Multiple Delete Option
                                                              13.01.00
```

The *Browse* button (**Browse**) allows the user to use the *Windows* interface to browse for a file which is located somewhere other than the PCGenesis spool directories. Before, the *Browse* button (**Browse**) could be utilized only to <u>view</u> a PCGenesis report within *Microsoft® Word*.

Now, the *Browse* button (**Browse**) can also be used in conjunction with the following, depending on which option is selected:

- Viewing a PCGenesis report (**⊙ MSWord**).

- Printing a PCGenesis report (**⊙ Print**).

- Printing mailing labels (**⊙ Label**) on AVERY 5162 label stock.

- Using a 3rd party to print a PCGenesis report (**⊙ 3rd Party**) without any PCL (printer control language) codes.

The *PCGenesis Microsoft® Word Print Queue* is a powerful feature which allows users to quickly display and view PCGenesis reports in a readable format in Microsoft® Word.   For users who have not implemented the *PCGenesis Word Print Queue*, Microsoft® Word macros must be installed on each user's individual computer. In order to access the instructions necessary for installing the Microsoft® Word macros, users may access the following link or contact Technology Management Customer Support for instructions:

http://www.gadoe.org/Technology-Services/PCGenesis/Documents/A1_QWordMacro2010.pdf

Section B: Installation Instructions for Release 13.01.00 Software

B1. Perform a PCGenesis Full Backup

When the prior evening's backup was successful, and when installing *Release 13.01.00* 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 13.01.00"**. Continue to use the backup CD/DVD/tape in the normal backup rotation.
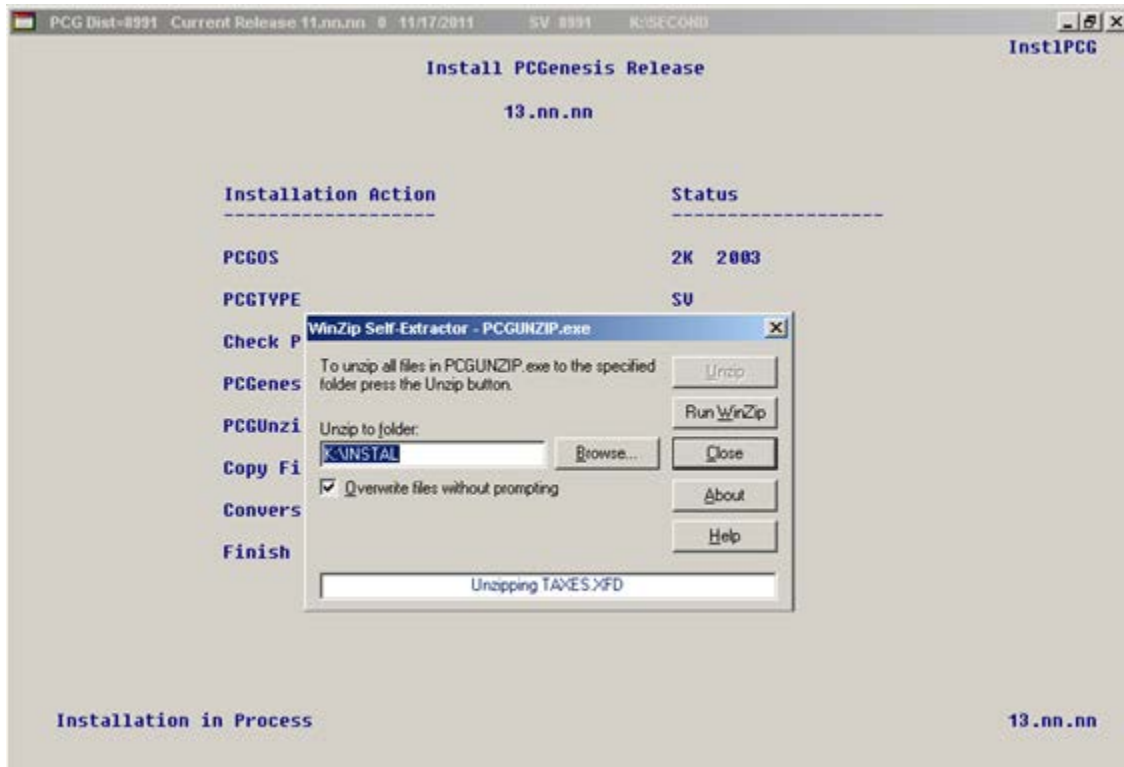
Step	Action
1	**Verify all users are logged out of PCGenesis**.
2	Close *Uspool* at the server.
3	Perform a **PCG Full Backup** to CD or DVD or Tape.
4	When the PCGenesis backup completes, label the backup CD or DVD or tape **"Full System Backup Prior to Release 13.01.00"**.
5	Proceed to *B2. Install PCGenesis Release 13.01.00.*

# *B2. Install PCGenesis Release 13.01.00*

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	Double-click **RELINSTL.BAT** 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 13.01.00* successful installations, the following message displays:
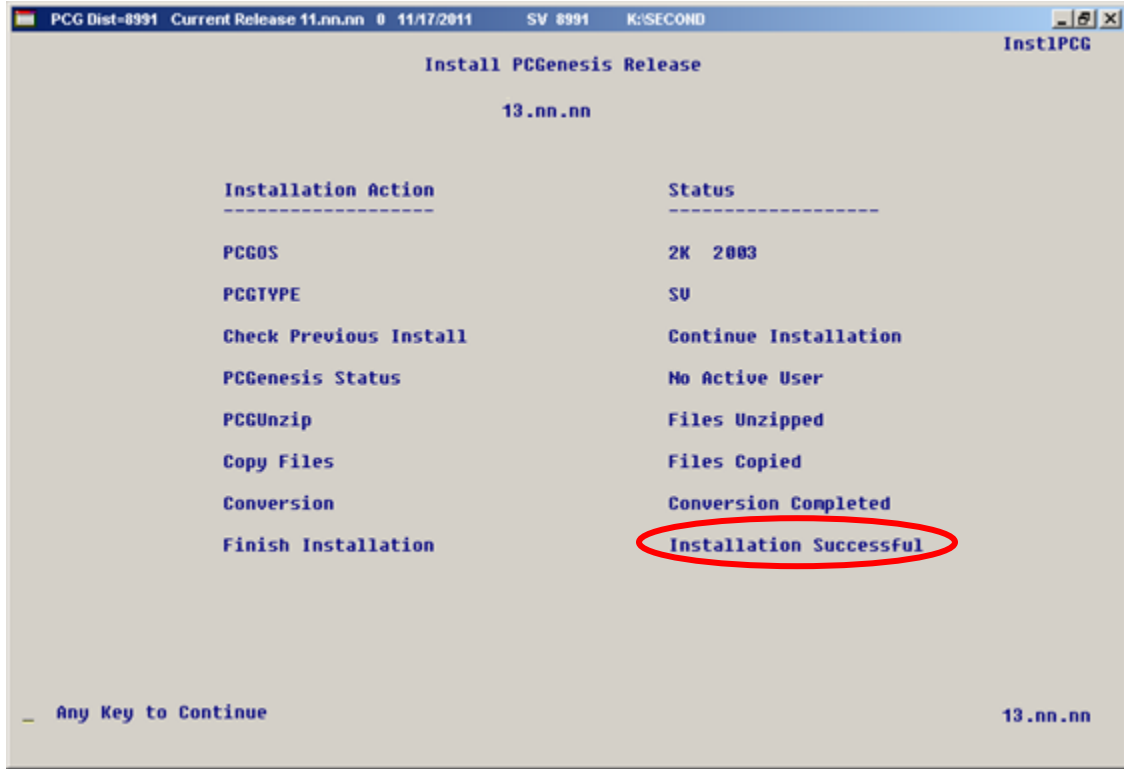
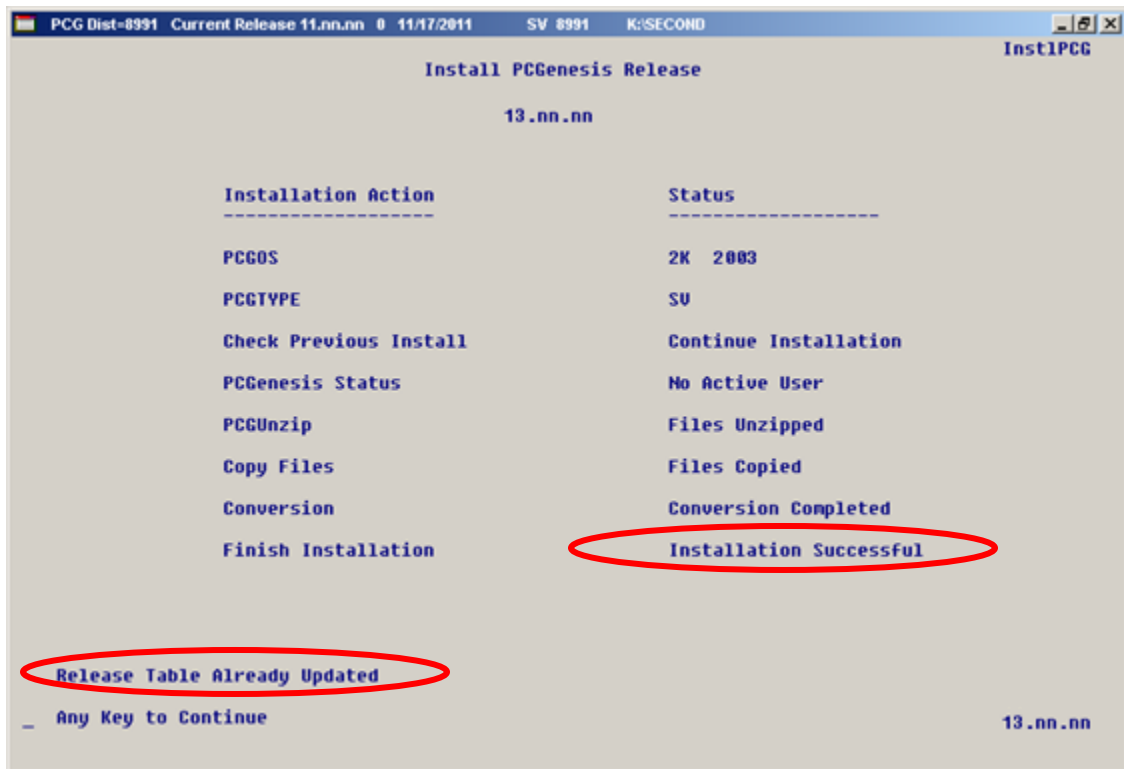| Step	Action
6	Select **Enter** to close the window.
7	**If the installation was successful:** Proceed to *B3. Verify Release 13.01.00 Was Successfully Installed.* **If the installtion was unsuccessful:** Proceed to *Step 8.*

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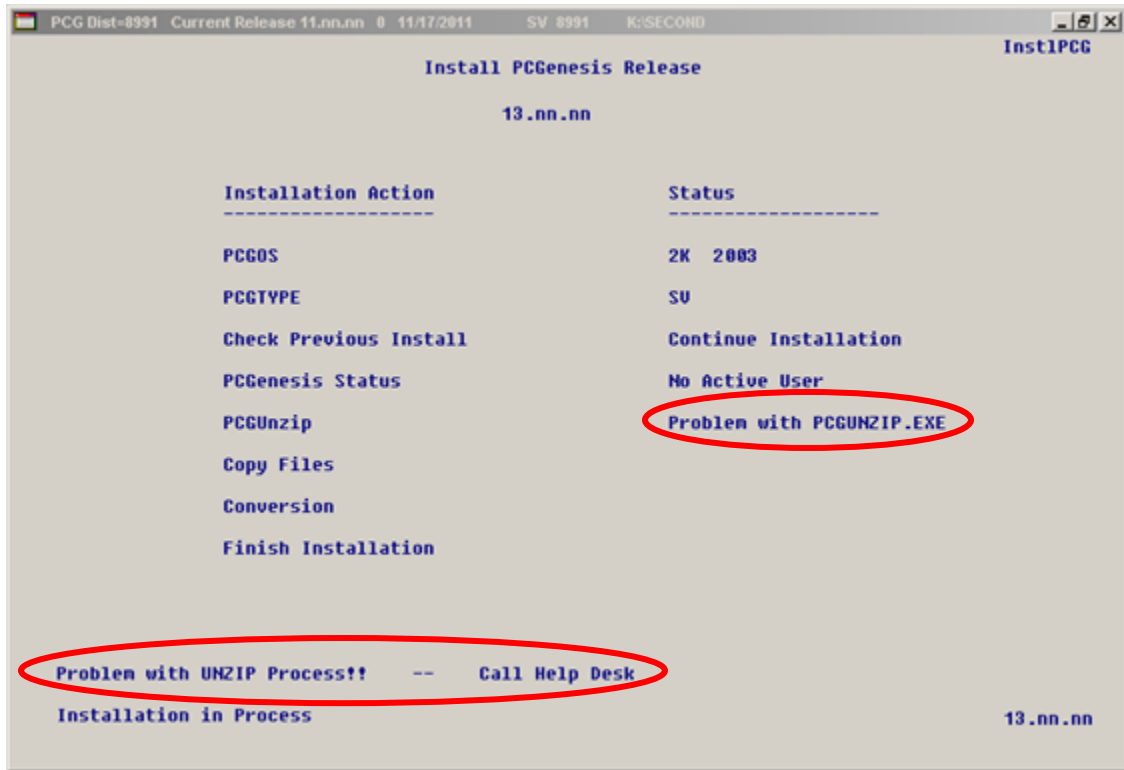
Step	Action
8	Select **F16** to close the window.
9	Return to the *MyGaDOE* Web portal, and detach the files again.
10	*Contact the Technology Management Customer Support Center for additional assistance if needed. A description of the error will display with instructions to call the Help Desk.*

A warning message will display if the release installation is repeated:
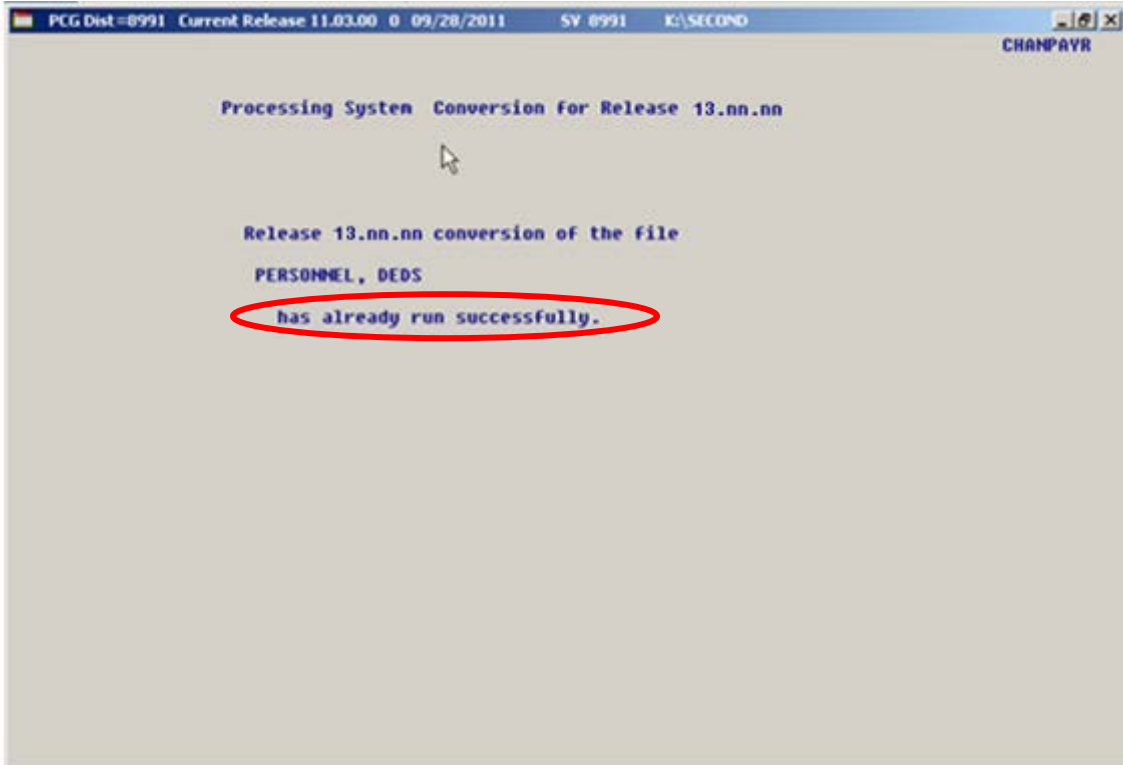
A warning message will display if the release installation is repeated, but in this case, the installation is considered successful.   In this instance, select any key to continue:
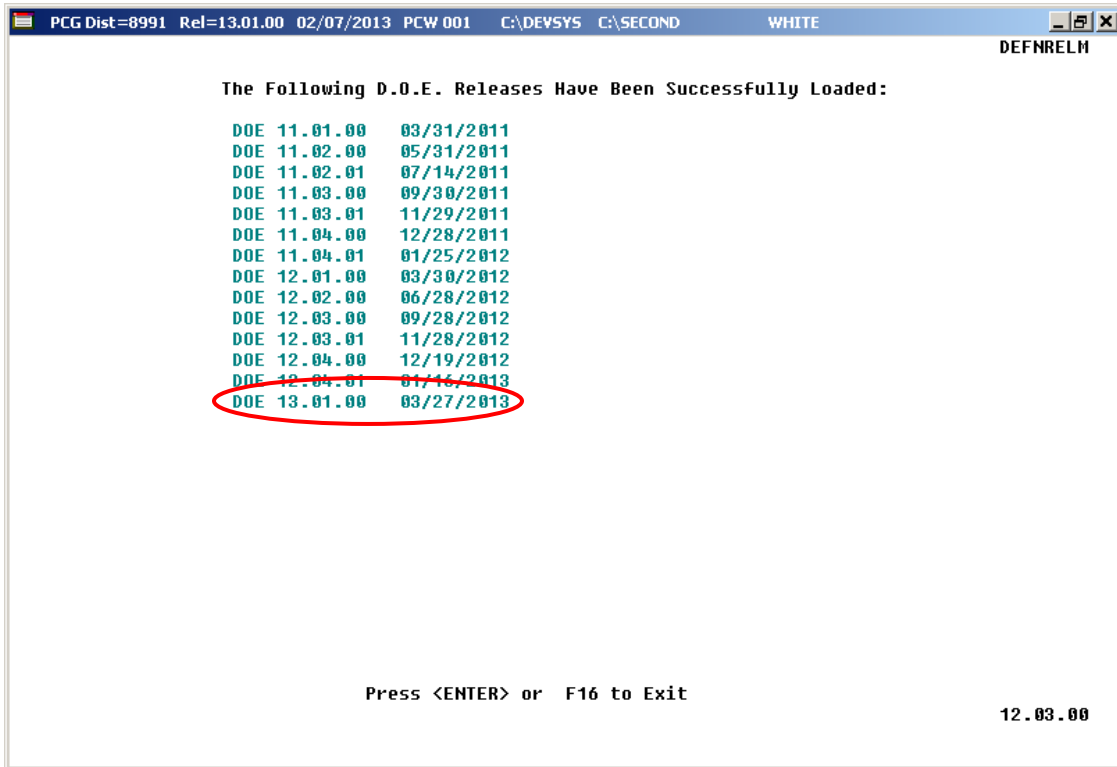
Step	Action
11	Proceed to *B3. Verify Release 13.01.00 Was Successfully Installed.*

B3. Verify Release 13.01.00 Was Successfully Installed

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

The following screen displays:

Step	Action
4	Verify **Release 13.01.00** 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 13.01.00** displays.*
	If Release 13.01.00 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.

B4. Perform a PCGenesis Full Backup after Release 13.01.00 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 13.01.00"**.