

# PCGenesis

## Future Features & Strategy

GASBO

Augusta, GA

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# PCGenesis

## Introduction

Alan Rees      PCGenesis Lead Analyst/Developer

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# Agenda

- PCGenesis Steering Committee
- PCGenesis Recent Enhancements
- PCGenesis Requested Features
- PCGenesis Plans
- PCGenesis Future
- Discussion



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# PCGenesis Steering Committee

- Provide a Format for User Input
- Help Establish the Future of PCGenesis:
  - Priorities
  - Direction
  - Enhancements
  - New Feature Design
- Preview State Mandated Changes
- Provide Resource for Testing Changes
- Review & Recommend PCG Funding Options
- Meet Monthly via Elluminate

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# PCGenesis Steering Committee Members

- Ben Hill County      **Nonie Cobb**
- Berrien County      **Julie Wiley**
- Brantley County      **Betsy Purcell**
- Brooks County      **Wanda Thompson**
- Dawson County      **Jamie Ulrich**
- Elbert County      **Phil Pitts**
- Greene County      **Dean Ware**
- Jefferson County      **Renee Weeks**
- Montgomery County      **Lynda Greene**
- Murray County      **Charlotte Roberts**
- Oglethorpe County      **Vicky Matthews**
- West Ga RESA      **Joyce Lovvorn**

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# PCGenesis Recent Enhancements

- New Payroll Statement
- Allow up to 5 Direct Deposit (ACH)
- Allow up to 5 Annuities per Employee
- New Export/Import for Pay Data
- Ethnic Code Change for CPI
- Enhanced I/O Error Screen

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# 2007 Survey Rank New Features

- 1 Leave System
- 2 Budget Forecast
- 3 School Access
- 4 Substitute Tracking
- 5 Fixed Asset
- 6 Web Access
- 7 Field Level Help Processing
- 8 Limit Access by Location
- 9 Ad-hoc Reporting
- 10 Employee Self-service

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# 2007 Survey Rank New Features

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# PCGenesis Requested Features

- Leave System/Substitute Tracking
- School Level Input
- Financial Reporting Options
- Budget Forecast
- GUI Screens
- Database

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# PCGenesis Planned Enhancements

- Leave System/Substitute Tracking
  - Identify Initial Features
  - Identify Full Features
  - Include Substitute Pay & Tracking
- School Level Input
  - Identify Desired Functions
- Budget Forecasting
  - Identify Desired Functions
- Financial Reporting
  - Improved Account Selection

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# Leave Survey

	Name and Description	Accrual	Taking Time
Leave Type 1	Name:	Accrue differently based on class code (Y or N)?	Allow negative balance (Y or N)?
	Description:	Accrue time on: Annual basis? ____ Monthly basis? ____ Other? ____	Unit of time allowed to take: Days? ____ Hours? ____ Fraction of hours? ____ Other?
	How is time tracked: By days? ____ By hours? ____ By fractions of hours? ____ Other? ____	Is the accrual capped? If so, maximum time allowed (specify unit):	
	Default GL account number:	What is the basis for leave accrual? Seniority (date of hire)? ____ Years of experience? ____ Other? _____	
	Anything else we should know?	Are separate accrual buckets needed for: State bucket? ____ Local bucket? ____	Anything else we should know?

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# Leave Survey

Paying Time for the Teacher	Paying Time for the Substitute	Year End Process
Do GL account entries in <i>Gross Data</i> screen change for the person taking the time off (eg, the teacher) (Y or N)?	How are the GL account entries in Gross Data screen generated? Are the entries based on the teacher's GL account codes (Y or N)?	Are YTD balances for January thru Dec? ___ July thru June? ___ Other? _____
If so, how?	Is there a default GL account or object code based upon the leave type (Y or N)? ___	When are unused balances cleared?
How are adjustments made for leave without pay for the teacher?	How is the substitute pay distributed over the GL accounts? Based on percentage? ___ No distribution? ___	Are unused balances dropped at year end (Y or N)?
Pay out unused time (Y or N)? ___ At end of year? ___ At end of job? ___	How frequently are substitutes paid? Weekly? ___ Bi-weekly? ___ Monthly? ___ Other? ___	Is this unused balance added to the sick leave balance (Y or N)?
Anything else we should know?	Anything else we should know?	Anything else we should know?

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# Leave System

- Define Leave Types
  - Vacation
  - Sick
  - Personal
  - Professional
  - Jury Duty
  - Sick Bank
  - Unpaid
  - Other ??

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# Leave System

- Track Leave
  - Add Days Available
    - Annual
    - Accrue Monthly
    - Adjustments
  - Post Days Used
    - Retain History
    - Maintain Current Balance
    - Limit Maximum Days Carried Forward

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# Leave System

- Report Leave
  - Report Current Days Available
  - Report Leave Used
  - Report ??
    - 
    - 
    - 
    -
  - Display on Pay Statement

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# Current Leave System

```
PCG Dist=8991  Rel=09.03.00  10/20/2009  ARD 005  C:\DEVSY S  C:\SECOND
Personnel System  PER04P

FKey          Leave Menu
-----
 1  -- Print Employee Leave Data
 5  -- Automatic Leave Update - By Pay Class
 6  -- Create Original Leave of Absence File
 7  -- Leave of Absence File Maintenance
 8  -- Leave of Absence File Print
 9  -- Delete Leave of Absence File
10  -- Update Job Code for CPI/Payroll/CS-1
```

- Who Uses the Current Leave System?
- Which functions are Used?
- What Other Leave Functions are Used?
  - F2-2-6 Update/Display Current Leave Data
  - F2-2-17 Update/Display Leave YTD Balance Data
  - F2-3-24 Import Leave Data for Paystubs from Leave Management System
  - F2-8-10 Print Employee Current Leave Edit Listing

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# Current Leave System

```
PCG Dist=8991 Rel=09.03.00 10/20/2009 ARD 005 C:\DEVSY S C:\SECOND
Automatic Leave Update By Pay Class PER0050

This program will automatically update leave data for:

State or local      (S or L)
Pay class          _

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

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
Other                 N
Without Pay           N
Personal Business     N
Vacation              N
```

- Who Uses Separate State & Local Buckets?
- Does This Screen Do What You Need?
- Where Do Most Sites Perform Accruals Or Postings?
  - In PCGenesis ??
  - In 3<sup>rd</sup> Party ??
  - Other ??
- When Is This Process Run?
  - Annual
  - Monthly
  - Other ??

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# Current Leave System

- Questions?
  - When Are Leave Totals Cleared?
  - Why 2 Different Leave Buckets?
    - State
    - Local
  - What Number of Pay Accounts for Substitutes
    - 1-40 ??

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# Leave Employee/Substitute Payroll

- Employee Payroll
- Substitute Payroll
- Payroll Account Distribution
- Earnings History
- Leave History

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# Leave

## Employee Payroll

- Payroll Options

- Paid
- Unpaid
- Substitute
- No Substitute
- Other ??

- History

- Tie Employee to Substitute History Record
- Tie Substitute to Employee History Record
- Other ??

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# Leave Substitute Payroll

- Payroll Account Distribution
  - Single Account
  - Spread by % Across Employee Accounts
  - Manual Change Option
  - Other ??
- Rate
  - Default Rate(s) (by Class?)
  - Manual Change Option
  - Other ??

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# Leave Input Example

**NewLeave** Employee - Substitute Leave Posting - Payroll Setup

**Employee**  
 EmpNo: 88925 Smith, John R.  
 SSN: 999-55-8888

**Leave Type**: Vacation  
**First Date Absent**: October 19, 2009  
**Days/Hrs**: 5 Days

**Leave Used YTD**: 8.5 Days  
**Available Leave**: 46.5 Days  
**Available Vacation**: 5.5 Days  
**Available Sick**: 25 Days  
**Available Personal**: 15 Days

**Substitute**  
 EmpNo: 87555 Jones, John Q.  
 SSN: 998-25-8455

**Proc Type**: Daily  
**Pay Rate Hrly/Daly**: 40.00  
**Days/Hrs**: 5  
**Substitute Gross**: 200.00

	Proc Type	Pay Type	Substitute GrossDat	Yr	Fnd	F	Prgm	Funct	Objct	Fcty	B	Add'l	Employee GrossDat	Emp %		
01	D		145.75	10	100		3011	1000	11000	205			5445.25	74.4		
02	D		4.02	10	100		3013	1000	11000	205			147.08	2.0		
03	D		19.10	10	100		3553	1000	11500	205			699.04	9.5		
04	D		28.14	10	100		3529	1000	11700	205			1030.17	14.1		
05																
06																
07																
08																
09																
10																
<b>Total Substitute GrossDat</b>			200.00										<b>Total Employee GrossDat</b>		7321.54	100

Enter 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15  
 Exit 17 18 19 20 21 22 23 24 25 26 27 28 29 Exit 31

Verify Cancel  
 Save Exit

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# Leave Input Example

**NewLeave** Employee - Substitute Leave Posting - Payroll Setup

**Employee Information**

Employee: EmpNo 88925 Smith, John R. Leave Type: Vacation First Date Absent: October 19, 2009 Days/Hrs: 5 Days  
 SSN: 999-55-8888

Leave Used YTD: 8.5 Days  
 Available Leave: 46.5 Days  
 Available Vacation: 5.5 Days  
 Available Sick: 25 Days  
 Available Personal: 15 Days

**Substitute**

EmpNo 87555 Jones, John Q. Proc Type: Daily Pay Rate: 40.00 Hrly/Daly Days/Hrs: 5 Subst Gross: 200.00  
 SSN: 998-25-8455

	Proc Type	Pay Type	Subst GrossDat	Account								Employee GrossDat	Emp %
				Yr	Fnd	F	Prgm	Funct	Objct	Fcty	B		
01	D		145.75	10	100		3011	1000	11000	205		5445.25	74.4
02	D		4.02	10	100		3013	1000	11000	205		147.08	2.0
03	D		19.10	10	100		3553	1000	11500	205		699.04	9.5
04	D		28.14	10	100		3529	1000	11700	205		1030.17	14.1
05													
06													
07													
08													
09													
10													
<b>Total Substitute GrossDat</b>			200.00	<b>Total Employee GrossDat</b>								7321.54	100

**Substitute Information**

Enter	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Verify	Cancel
Exit	17	18	19	20	21	22	23	24	25	26	27	28	29	Exit	31	Save	Exit

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# Leave Design Team

- Volunteers
- 3-5 Members
- Meet via:
  - emails
  - Elluminate
  - Teleconference

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# School Access Survey

<b>School Level Access</b>	<b>School Input</b>
<p>Which type of school level access do you most desire? Check one, or rank with #1 as most important.</p> <ul style="list-style-type: none"><li><input type="checkbox"/> School data input</li><li><input type="checkbox"/> Financial account query</li><li><input type="checkbox"/> Employee record query</li><li><input type="checkbox"/> Leave balance query</li><li><input type="checkbox"/> P.O query</li><li><input type="checkbox"/> Separate school financial data</li><li><input type="checkbox"/> Other request</li></ul>	<p>What processes would make your job easier if the input data could be generated directly at the schools? Check one, or rank with #1 as most important.</p> <ul style="list-style-type: none"><li><input type="checkbox"/> Teacher leave data</li><li><input type="checkbox"/> Substitute tracking</li><li><input type="checkbox"/> Time card entry for hourly payroll</li><li><input type="checkbox"/> New employee hire data</li><li><input type="checkbox"/> Purchase order request</li><li><input type="checkbox"/> Other request</li></ul>

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# School Level Access

- Initial Data Input
- Account Query
- Employee Query
- Leave Balance
- P O Query
- School Accounts
- Other ??

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# School Level Access

- Initial Data Input
  - Purchase Order Request
  - Leave Information
  - Substitute Payroll
  - Hourly Payroll
  - New Employee
  - Other ??

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# School Level Access

- Other Function??



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# PCGenesis Financial Reporting

- Consistent Account Selection for Reports
- Selective Account Selection for Reports

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# Employee Self-Service

- 3<sup>rd</sup> Party Service Provider
  - PCGenesis Will Provide Database
  - 3<sup>rd</sup> Party Provides Browser Interface
  - 3<sup>rd</sup> Party Provides Security
  - Employee Data View Only
  - Other Option ??
- Have Any Vendors Offered This Service?
- What Are Your Thoughts?

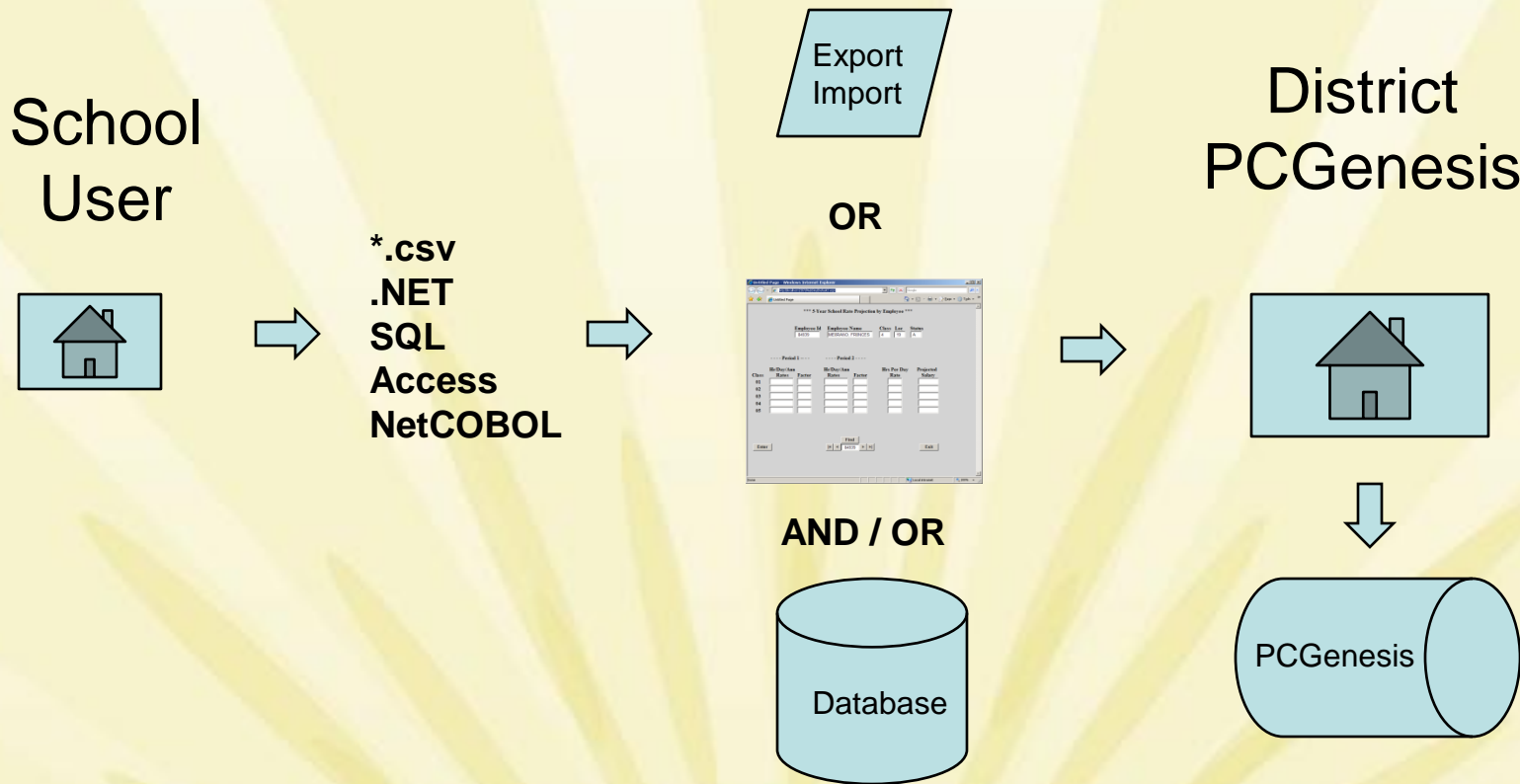
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# PCGenesis Future

- **Functionality**
  - Budget Forecast
  - Fixed Asset ??
  - Field Level Help Processing
  - Ad-hoc Reporting
- **Technology**
  - GUI
  - Database

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# New Functions, Blend of Technology at Site



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# PCGenesis Enhancements Survey

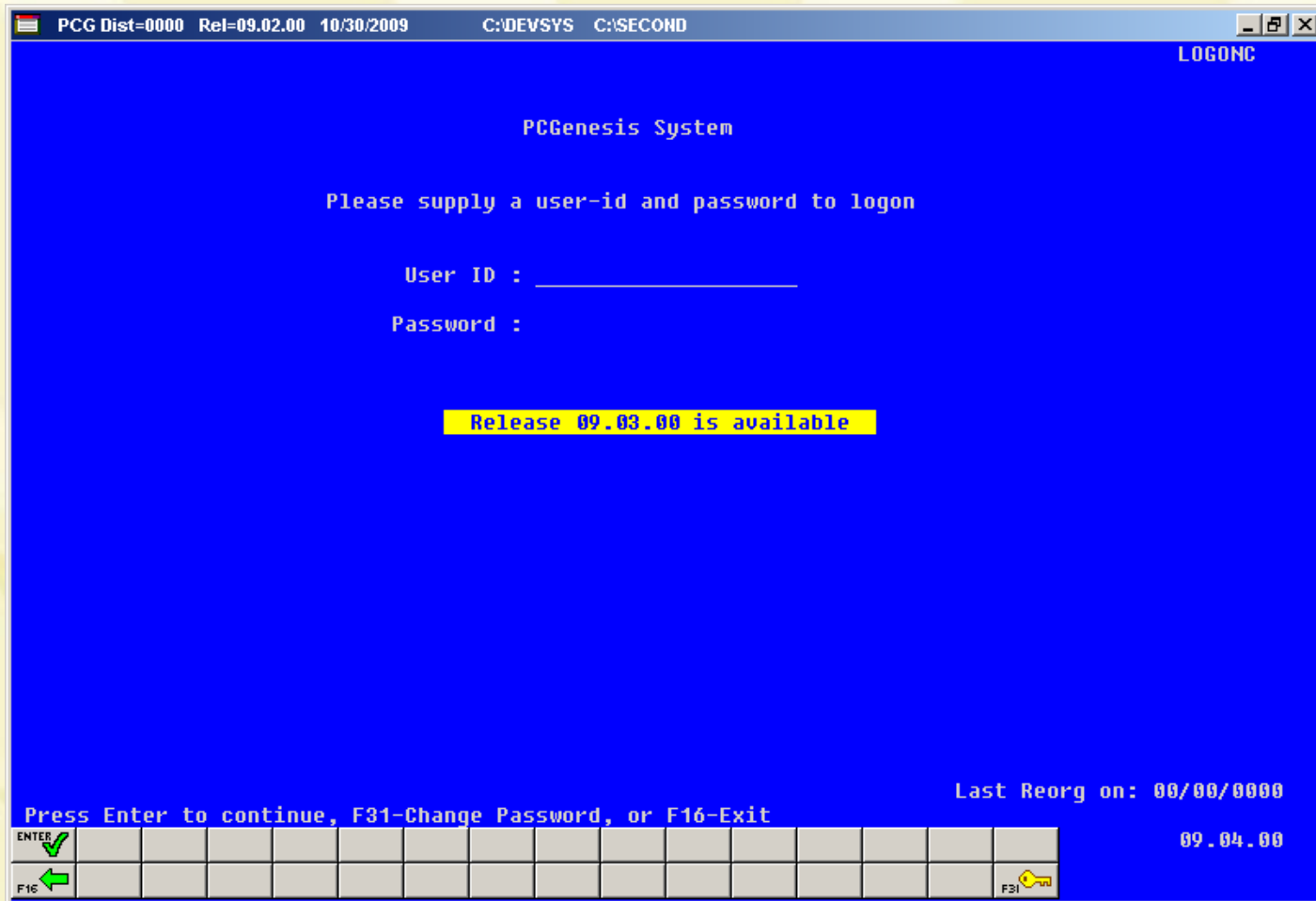
## **Top 8 Enhancement Requests**

After a new leave system, what are the top 8 enhancements you would like to see in PCGenesis? (Make #1 your top priority.)

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.

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# PCGenesis Release Notification



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# PCGenesis

## Site Recommendations

- **Upgrade** any Server > 3 years old
- Implement **Terminal Server** Access
- **Backup** Data to CD/DVD Nightly
- **Backup** K:\\*.\* in Full Site Backup  
(Retain 3 weeks)
- Add **ReorgX.bat** to Scheduled Tasks
- **2008 Server** (64 bit) OK

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A stylized sunburst background with a semi-circle at the bottom and rays extending upwards. The rays are in shades of yellow and white.

# Open Discussion

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