

AptaFund 4.1 Release Notes — 2016.06.17 Update

Harris School Solutions has implemented an issue tracking system, named JIRA, to help us monitor program enhancements and defects. In the future, you will be able to reference these issue numbers through Harris eSupport. The APTAWEB numbers refer to the issues in JIRA that were resolved in this release.

Note: Issues marked with two asterisks (**) will be described more completely in technical notes available on eSupport.

New Features

- **Payroll > Percentage Deductions:** Added a mass update feature for the following fields for Percentage deductions that have a status of New and the variable field set to Yes — deduction start & end dates, number of periods, employee & employer period %, employee monthly & yearly caps, period % cap, employer monthly & yearly caps, and comment. APTAWEB-3630

Improvements

- **Accounts Payable > Vendor Invoice**
 - The account code & description are now available to be displayed in the Vendor Invoice grid and are displayed by default in Vendor Invoice Detail. APTAWEB-5509
 - You're now able to delete line items from direct invoices, credit memos, and employee invoices. APTAWEB-4845
- **Affordable Care Act**
 - ACA district: Selecting ACA_Only from the database list now displays the list of ACA district databases available to the user. APTAWEB-5423
 - SSN: The SSN is no longer displayed by default on the ACA grids, but it can be displayed when needed. APTAWEB-5497
- **Budget Development:** Added the salary schedule, grade, and step columns to the Current Detail and Projected Detail tabs in the Budget Development report. APTAWEB-5439
- **** Capital Assets > Capital Assets Configuration:** Added the rollover capital assets feature. APTAWEB-5524
- **** Employee Self-Service > My Leave Requests:** Employees can now request leave for the next fiscal year, and those leave requests are attributed to the proper year. If the new fiscal year isn't set up, the employee will receive an explanatory message. APTAWEB-5506
- **Human Resources**
 - Employee Jobs > Increment Salary Schedule Step: Result window now lists the employee display name with the job name so you can see which employees have been updated. APTAWEB-5367
 - HR Configuration > Salary Schedules: Changes made to the rounding criteria without making any changes to grade or step are now carried through to employee jobs on the salary schedule. APTAWEB-5452
 - Manage Employees > Rollover Employee Jobs: This feature now provides correct and helpful error messages when the process encounters errors and/or fails. APTAWEB-5432
 - Reports > Employee Contracts: This report is now on the Reports menu and allows you to print a contract for individual employees. APTAWEB-5588
- **Payroll > Employee Payroll Information > Employee Payroll Detail > Payment Plan Distribution:** Editing a payment plan distribution is now done in a batch edit window with the running totals for Undistributed and Remaining Salary displayed. APTAWEB-5517

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- **User Interface**
 - Account codes: The account code description is now displayed along with the account code when the account code is not editable. APTAWEB-5496, APTAWEB-5582
 - Improved Performance
 - Faster loading of the popups for selecting database and fiscal year. APTAWEB-5421
 - Improved speed loading grids & page titles throughout program. APTAWEB-5400, APTAWEB-5468, APTAWEB-5471, APTAWEB-5480, APTAWEB-5481, APTAWEB-5547
 - Job queue notification is now displayed only when navigating away from a page after a job has started — not when a job hasn't been started. APTAWEB-5476
 - Purchase Order
 - Filter: Added a multi-list filter for Equal To and Not Equal To operations When filtering on status, ordering vendor, PO type, or ship to. When you choose one of these operations, you can begin typing to open a list of options. APTAWEB-5316
 - Performance: Faster loading times for the Purchase Order window. APTAWEB-5419
 - Purchase Order Details
 - This window now opens in a popup when adding, editing, or viewing a PO. APTAWEB-5319
 - Added standard shortcuts to this window. APTAWEB-5321
 - Users
 - A user whose account has been disabled now sees a message on login that the account has been disabled, and only the My AptaFund menu is available. APTAWEB-5424
 - A user now gets a clear message if email and login ID are different. APTAWEB-5420
- **Vendor Management > Vendor Detail:** You're now allowed to enter the vendor's tax ID in either SSN or EIN format by entering numbers and dashes — for example, xxx-xx-xxxx or xx-xxxxxxx. APTAWEB-5417

Bugs Fixed

- **Account Code Filter:** Fixed this filter in the Human Resources >Employee Job and Accounts Payable > Vendor Invoice windows. APTAWEB-5584
- **Accounts Payable > Vendor Invoice > Result window:** Corrected a bug causing blank results window when the action is successful. APTAWEB-5102
- **Administration**
 - Manage Requisitioners: Requisitioners no longer have duplicate records in this window. APTAWEB-5166
 - Manage Users > User Details: Email field now accepts an email address with a domain name consisting of a single letter, such as name@b.com. APTAWEB-5349
- **Budget Development:**
 - The report is no longer regenerating when you select Continue with Previous Editing command. APTAWEB-5442
 - Editing the report no longer gives invalid error. APTAWEB-5601

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- **Human Resources**
 - Employee Jobs > Job Details: User can now approve a job that exceeds budget when desired. APTAWEB-5574
 - Employee Leave Detail: Fixed the leave amount calculation & leave dates and added an action column. APTAWEB-5362
 - Manage Employees
 - Approve jobs: When the HR Configuration value, Do not allow the total FTE of all primary jobs to exceed 1.0, is set to Yes, you can now approve multi-year primary jobs as long as the primary jobs don't overlap, resulting in an FTE > 1.0. APTAWEB-5461 In Progress
 - Edit employees: Fixed a bug caused when viewing detail records while paging through a selected group of employees. APTAWEB-4381
 - Education History: Users are now able to add and edit education history records. APTAWEB-5575
 - Employee Details > Job Details: Adding a job from a master position no longer increases the job end date by one day. APTAWEB-5502
 - Error message: Users now get the error message, "Please select one or more records for this operation," if they click the Edit button without selecting any employees to edit. APTAWEB-5583
 - Mass Update Employee: Now able to close jobs when one or more of the jobs were encumbered at the time of approval. APTAWEB-5590
 - Master Position Management
 - Rollover Master Position
 - Master positions now rollover when the Rollover Linked Positions field is set to No. APTAWEB-5501
 - Master positions now rollover when they're not linked to a salary schedule. APTAWEB-5573
 - Salary Schedule link: The salary schedule field now retains its data when the master positions are rolled over. If the salary schedule has a new ID in the new fiscal year, the field will use the new ID. If the salary schedule doesn't exist in the new year, an error message will be displayed. APTAWEB-5500
 - Position Management
 - Filter: Saving a grid filter & applying it no longer causes an error. APTAWEB-5544
 - Mass Update Position Values: Account codes now update correctly. APTAWEB-5576
 - Salary Schedules window: Selecting all records, then de-selecting one record & clicking the Edit button no longer results in an invalid error message. APTAWEB-5463
- **Payroll**
 - Manage Payroll
 - Deduction Assignment > Preview Net Pay: Invalid actions now result in helpful error messages. APTAWEB-5473
 - Pinned Payroll Cycle filter: This filter now lists only the payroll cycles from the current accounting cycle. APTAWEB-5577
 - Register Details
 - Edit hours: Fixed a bug preventing users from adding or editing regular and OT hours. APTAWEB-5521
 - Select All: Checking the Select All box on a grid that has no records and selecting an action no longer results in the incorrect confirmation message. APTAWEB-5462
 - Select employees for editing: On a new register, if you select employees to edit in a different order than they appear in the grid, the Job Edit window now displays the correct information for each employee and handles the edits correctly. APTAWEB-5529
 - **Reports > Payroll > Gross Wages by Worker's Comp Report:** This report now uses the correct multiplier to calculate gross wages. APTAWEB-4835

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- **State Specific**
 - California
 - Human Resources > Employee Jobs: Procedures specific to California employees are now being correctly implemented when adding and updating jobs. APTAWEB-5513
 - Reports: The display option, Show report parameters on report, is now visible for all California databases. APTAWEB-4339
 - Kansas > KPERS Pay Period Export: Fixed this export so it no longer fails. APTAWEB-5511