Harris School Solutions has an issue tracking system, named JIRA, to monitor program enhancements and defects. You are 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

- **** Cash Receipts > Cash Receipts Details**: Added a read-only, "flattened" window that allows you to view receipt batches with the receipts included in each batch. The default view is grouped by batch description, and you can click on the Receipt Number link to view the receipt detail. APTAWEB-6329
- **** General Ledger > Comparative Financial Statements**: Added a report that compares total revenues and expenditures by fund, as well as changes in fund balance by fund. APTAWEB-7103

Improvements

- **Accounts Payable > Warrants**: The text entered in the Account Number field in Vendor Management now prints on the warrant if the AP Configuration setting Print Memo Line is set to Yes. APTAWEB-7574
- **Banking > Bank Account Register > Reconcile Account**
  - Once the reconciliation process is completed, the checkboxes are cleared for items that were selected to reconcile. APTAWEB-4308
  - Selecting more than 100 items and clicking Mark now actually marks all selected records. Also added the Result window to display the successes and failures. APTAWEB-7177
- **Budget Development**: Changed text color to improve readability for edited amounts in the Projected Amount column when the row has been selected to send to Budget Management. APTAWEB-7419
- **Payroll**
  - Manage Payroll > Register Details: Added the Designation field as a read-only column in the Job Batch Edit popup. APTAWEB-4682
  - Manage Payroll Vouchers: The text entered in the Account Number field in Vendor Management now prints on the liability check if the Payroll Configuration setting Print Memo Line is set to Yes. APTAWEB-7574

- **Payroll, continued**
  - ** State tax withholding for HSA deductions and contributions: APTAWEB-6750
    - Added the *Payroll Configuration* value, *Withhold State Tax on HSA Contributions*.
      If the Configuration value is set to *Yes*, you can set the Pre-SS HSA deduction to HSA Deduction, and any employer-side contributions will be included in the State Taxable Wages. If employee contributions will also be taxable, set the Affects State Taxable Income field on the deduction to No.
      If the Configuration value is set to *No*, no employer-side contributions will be added to State Taxable Wages. You can still make employee contributions taxable by setting Affects State Taxable Income on the deduction to No.
    - Added the column labeled HSA Deduction to Manage Deductions. This column is used for grid and screen reports.
- **State Specific**
  - Colorado > Reporting Improvements
    - CDE December Staff Report
      - Made the required changes for the 2017-2018 submission. APTAWEB-7093
      - Changed a label on the Staff Assignment tab from Grant/Project Fund Staff to Grant/Project Funding Source. APTAWEB-5969
      - Clicking on an Employee Name link on the Staff Assignment tab opens the Employee Assignment Edit popup window for correcting errors. APTAWEB-6019
      - Human Resources > Employee Assignments: Added a flattened data grid to display each employee with their assignment information. This view allows you to mass update assignment fields and is available only when the Assignment module is enabled. APTAWEB-7277, APTAWEB-7278
      - Human Resources > Manage Employee > Edit Employee > Assignments tab: Converted the Grade checkboxes on the Add Assignment popup to a multi-select field. APTAWEB-5980
    - Colorado December Financial Report
      - Added the Account Type and Account Description columns to the grids. These fields are hidden by default, but may be displayed using the Table Display Settings dialog. APTAWEB-6780
      - Added the mass results popup that opens displaying the changes made during the Mass Update process. APTAWEB-6322
- **User Interface**
  - Collapsible Panel: Made the arrow icons to collapse and expand sections much more visible by making them a lighter color. This improvement has been applied to all windows with the accordion feature. An example is in Human Resources > Manage Employees > Employee Details. APTAWEB-5000
  - Grid resizing: The grids in the following windows now automatically resize based on the number of rows to be displayed — Liability Vouchers; Payment Voucher Detail, both Payroll & AP; Register Details; and Actual - Journal Entry. This change allows you to scroll just the browser and not have to scroll the grid as well. APTAWEB-7465

- **User Interface, continued**
  - Informational messages: Success, warning, and error messages have an improved format. Success messages are displayed for a few seconds in green text and then disappear. Warning and error messages — yellow and red respectively — are displayed until the message is cleared, another message is displayed, or you move to a new window. APTAWEB-7377, APTAWEB-7378
  - Payroll > Payroll Register > Preview Net Pay
    - Added the Subject To Wages field in the Deductions grid. This field shows the actual wages on which the deduction amount is based. The field is hidden by default, but may be displayed using the Table Display Settings dialogue. APTAWEB-7170
  - Purchasing
    - My Purchase Requisition Approvals
      o Added the system grid setting called *Requiring my approval* to the My Purchase Requisition Approvals window. This grid setting can be applied by selecting it from the gear drop-down at the upper right corner of the grid. APTAWEB-7301, APTAWEB-7302
      o Set a system default to filter this window to show PRs *Requiring my attention*. You can still create your own private and shared filters. APTAWEB-7518
    - Purchase Requisition: The commands to add and edit a PR now open popup windows. You can approve, disapprove, withdraw, copy, submit, and unsubmit the PR from this window. You can also view the budget from the PR Details popup. APTAWEB-6810, APTAWEB-6811, APTAWEB-6812, APTAWEB-6813, APTAWEB-6818, APTAWEB-6820, APTAWEB-6821, APTAWEB-7533, APTAWEB-6822, APTAWEB-6823, APTAWEB-6840, APTAWEB-6842, APTAWEB-6910, APTAWEB-6968, APTAWEB-7032, APTAWEB-6824, APTAWEB-6857, APTAWEB-7245, APTAWEB-6825, APTAWEB-7576, APTAWEB-7653, APTAWEB-7521,APTAWEB-7758
- **Vendor Invoice**: Improved the performance so the last page of the grid loads much faster when there is a large number of invoices. APTAWEB-7604

Bugs Fixed

- **Accounts Payable > Vendor Invoice**: The pinned Ordering Vendor filter was empty, but now correctly includes vendors and employees. APTAWEB-6509
- **Administration > Data Import > AESOP Import**: Improved the import so you can import Column J (SubId) without information in Column M (Master Position Name), Column N (Account Code), and Column O (Pay Rate). As a result, the import doesn't add the substitute jobs to the Payroll Register; instead it will only add the leave detail record for the main employee and add the name of the sub in that record. This improvement will allow you to import subs separately when you use Aesop for sub tracking and Attendance On Demand for paying the subs. APTAWEB-7358

- **Human Resources**
  - Employee Certificates: Approved areas and endorsements added in HR Configuration now display correctly in the drop-down list in Employee Certificate Details and in the Employee Certificate grid when added to an employee certificate. APTAWEB-6622, APTAWEB-7545
  - Employee Contracts: Fixed contract printing so the Other Job Block no longer prints much bigger than it should when it's the only block on the contract. APTAWEB-7703
  - Manage Employees > Employee Details > Jobs: Fixed a bug that was causing an error when creating an assignment for an hourly employee. APTAWEB-7685
- **Payroll**
  - Employee Payroll Information: The number of periods is now correctly displayed for Evenly Over N Periods payment plans after the job type has been changed to Hourly Payment Plan, and the payment plan has been edited. APTAWEB-7609
  - Manage Deductions > Deduction Details: Restored the Save button when editing system deductions. APTAWEB-7641
  - Manage Payroll Vouchers: Fixed a bug preventing user from voiding a payroll liability check if a paycheck with the same internal ID had already been reconciled. APTAWEB-7525
  - Payroll Deduction Verification Report: This report now includes all employees when sorted by employee name. APTAWEB-7500
- **Purchasing**
  - Purchase Order: When a PO line item has multiple account allocations and there are multiple PO copies printed, each copy now prints the line item correctly, with correct quantity, unit price, total price, item description, and part number. APTAWEB-7621
  - Purchase Requisition: Fixed a bug caused by the conversion from 3.0 to 4.1 that allowed a PR to be closed in 4.1 while still having pending approvals left from 3.0. APTAWEB-7336
- **State Specific > California > EDD Quarterly Form DE9/DE9c XML Export**
  - Corrected the Total Tax Withheld amount on the DE9C Totals tab. It no longer rounds the amount to the nearest dollar. APTAWEB-7587
  - ZIP Code is now formatted correctly in the export file. APTAWEB-7603
- **User Interface**
  - Contact Management: Records selected in Addresses/Contacts in one of the following windows no longer affect the displayed number of records selected in Addresses/Contacts in any of the other windows. The affected windows are Bank Account Management, Customer Management, and Vendor Management. APTAWEB-7478
  - Grids: Data now loads correctly even if you haven't selected a column to sort the grid. If a default sort hasn't been selected, the grid will sort on the first visible column. APTAWEB-5894