

AptaFund 4.1 Release Notes — 2015.08.16 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.

New Feature

- A new Payroll report – the Multiple Worksite Report – can be used in ALL states to count the number of employees that were paid on the 12th for each month in the quarter. This report will also list the quarterly UI (unemployment insurance) wages for all eligible employees. APTAWEB-3681

Improvements

- **Human Resources**
 - Manage Employees: The Date of Last TB Test and Date of Last Fingerprint fields are now included in the Manage Employees list, the Employee Details window in the Employment section, and the Setup New Employee wizard. APTAWEB-3689
- **Payroll**
 - Payroll Configuration > Leave Type: Added the ability to set the accrual cap for an employee group based on years of service. APTAWEB-3450
 - The Payroll Register Payments report now has the option to include or exclude detail. This option makes it faster to run the report because it includes only the Deduction Summary and Fund Summary tabs. APTAWEB-3802
- **Purchasing & Payables**
 - Payment Management > Warrant Printing: When vouchers include more than 13 detail lines, the additional lines can now be printed on plain paper, not check forms. APTAWEB-3755
 - Purchase Order:
 - Clicking on the PO number now opens the Purchase Order Details window for POs in all states, not just new POs. This feature allows you to view the PO even when it's no longer editable. APTAWEB-3682
 - A new column displays the number of attachments to each PO, and an additional tab in the Purchase Order Details window allows you to view, add, edit, and delete attachments. APTAWEB-3690
 - Added the Requested By and Department columns to the Purchase Order grid. APTAWEB-3669
 - Improved the performance in this window so POs are loaded more quickly, and only POs from the selected accounting cycle are included. APTAWEB-3711
 - Requisitions: Added the ability for approvers to edit submitted requisitions. APTAWEB-2831
- **Enhanced Reporting**
 - Grid Reports
 - Manage Employees: Added the option to include user-saved grid settings with their filters in the Reports setup window. User-saved grid reports will be included in the Reports list under the Human Resources module. APTAWEB-3708_APTAWEB-3741_APTAWEB-3742_APTAWEB-3743_APTAWEB-3764
 - The Report Title in the Report Settings window defaults to the name of the grid in which you're working. APTAWEB-3757

Continued on next page

- Standard reports:
 - You now have the option to print these reports in either portrait or landscape orientation. APTAWEB-3739
 - Reports now print in 8pt Arial. APTAWEB-3740
- **User Interface Design**
 - Hyperlinks in the grids can now be used to open the content in a new window or new tab. For example, right-click on an employee name in Manage Employees, and select either **Open link in new tab** or **Open link in new window**. APTAWEB-3604
 - Pinning filter drop-downs: For filters that you use on a regular basis, you can now pin the filter drop-down to the top of grids and save them as part of grid settings & named filters. You can also unpin system default filter drop-downs if you don't use them. APTAWEB-3702_ APTAWEB-3829_ APTAWEB-3830
 - Action buttons:
 - The action buttons at the top of detail windows now stay at the top when you scroll down the window. APTAWEB-3731
 - Payroll: Action buttons for the following windows were moved to the top of the window: Employee Payroll Information > Mass Payment Plan, Mange Payroll Vouchers > Liability Check Printing & Voucher Detail > Adjustments, Employee W-2 Information > W-2 Box Subcodes & Edit Locality List. APTAWEB-3676
 - HR > New York customers: Action buttons have been moved to the top of the Longevity Schedules window. APTAWEB-3610
 - Tabs in browser windows will display the title of the AptaFund page. APTAWEB-2913
- **State Specific**
 - California:
 - The Independent Contractor Report/Export now presents all vendors with missing information in a single popup window. APTAWEB-3024
 - Created recap sheets for the LA County STRS/PERS reports. The recap sheets show the wage amount, the ER and EE Contribution amounts by PEPRA code. APTAWEB-3699
 - Colorado: The PERA Contribution has the correct alignment when the Fit to One Page Wide option is used. APTAWEB-1633
 - Nebraska: NSSRS report has Report to Grid feature so rows can be inserted. APTAWEB-2393

Continued on next page

Bugs Fixed

- **ESS & Human Resources**
 - Employee Self Service: W-2s are now correctly displayed for inactive fiscal years. APTAWEB-3927
 - Manage Employees > Employee Details, Employee Jobs > Job Details: Employee picture now loads and displays correctly. APTAWEB-3710
 - Position Management: Added the missing Delete button. APTAWEB-3688
- **General Ledger**
 - Journal Entry – Actual: Fixed a bug so clicking on a hyperlink in the top grid now populates the bottom grid. APTAWEB-3784
 - General Ledger – Aggregation: Grid is now aligned with the rest of the screen. APTAWEB-3804
- **Payroll**
 - Employee Payroll Information: Corrected the error message when attempting to submit a job to payroll when the employee hasn't been submitted. APTAWEB-3763
 - Fixed Amount Deductions, Percentage Deductions, & Direct Deposit Deductions: Added the status, department, paycheck site, and deduction group columns. APTAWEB-3796
 - Manage Deductions: W-2 sub codes are now being properly saved, and sub codes with spaces or dashes are not causing errors. APTAWEB-3700
 - Manage Payroll:
 - Register Details: Add Job To Register: Can now correctly add a regular job, but not a supplemental job, to all employees. APTAWEB-3762
 - Register Details: Batch Edit no longer displays a blank grid. APTAWEB-3836
 - Print Paychecks: Reinstalled the missing MICR font. APTAWEB-3883
 - The New Hire Report has been added to the Reports list so users can access it. APTAWEB-3799
- **Purchasing**
 - PO Item Details: Popup now displays line item total. APTAWEB-3680
 - PO Printing:
 - Issue Purchase Order command now correctly prints the PDF file. APTAWEB-3704
 - Purchase orders now correctly print page numbers and signatures. APTAWEB-3705
 - Purchase Order window: Edit All command no longer gives error. APTAWEB-3812
 - Purchase Requisition: Deleting a PO no longer leaves the reserve amount in View Budget in Requisitioning. APTAWEB-1996
- **User Interface Design**
 - In the Filter popup window, when you click on a column name to use it as filter, the column name remains visible — it no longer scrolls up out of sight. APTAWEB-3654
- **State Specific**
 - Colorado > CDE Staff Profile: No longer gives an incorrect error on the State code of Degree field. APTAWEB-3125
 - Pennsylvania > PSERS Export: The Work record export now has the correct report date. **Note:** You'll now need to run the Report to Grid command once before using the Continue with Previous Editing command in order to set the correct parameters. APTAWEB-3117