Harris School Solutions has an issue tracking system, named JIRA, to monitor program enhancements and defects. The APTAWEB numbers refer to the issues in JIRA that were resolved in this release.

To submit an idea for product enhancements/improvements, click here.

Release webinar & technical documents

Issues marked with two asterisks (**) are included in the Release Webinar AND a technical document available on Team Support and in the online help.

Click the **Play recording** link below to open the webinar. Registration with your name & email address is required, but no password is required.

Play recording (40 min)

New Feature

- **** Leave Request Attachments:** Leave request can now have attachments added. There is a new Attachment tab on the Leave Request pop-up that will show the attachments on the request. Here users can add, edit, and delete attachments. The main Leave grid has a new column labeled "Attachment(s)" which will show the number of attachments on the Leave Request. APTAWEB-10973

- **** My Signature:** Users can now upload their signatures using a .jpg, .jpeg, or .png file. This is under My AptaFund > ESS > My Signature. Future updates will allow users to digitally sign contracts or tax forms using this uploaded signature. APTAWEB-12045

Improvements

- **Employee Contracts:**
  - Publish to ESS pop-up has been updated to include a drop-down list of employees eligible for the selected type of contract. This pop-up includes the field "Replace documents with matching Category and Description" which when set to "Yes", will remove previously published documents with matching Document Category and Description. APTAWEB-6843
  - ** When editing Employee Contracts, the new "Data Format" button appears for Job Block Columns & Other Job Block Columns. This will open a new pop-up that offers a better variety of customization. Users can now customize fields shown, order, size, alignment, summation, or how many decimals to display. APTAWEB-3855, APTAWEB-12070, APTAWEB-12071
  - ** AptaFund has added the ability to create contract bookmarks out of employee, employee job, or master position custom fields. APTAWEB-10550, APTAFUND-12095
- Employee Jobs – Mass Update: Mass Update pop-up has been updated to include the option for changing job designation. When selecting two or more jobs with different master positions, the Designation drop down will initially be blank and update when a user selects another Job Name (master position) to change for the jobs selected. APTAWEB-11803

- **ESS – Manage Employee Documents**
  - Adding/Editing Employee Document now shows Employee field with a multi-select box instead of the previous Employee ID dropdown. This field defaults to "All" when no specific employee name is selected for the document. APTAWEB-5005, APTAWEB-6306
  - With the new multi-select box, users can Mass Assign a single document to multiple employees. Simply selecting more than one employee name from the multi-select box will add a new separate document record for each selected employee. Mass Adding will result in a Mass Operation Results pop-up. If there is an error, no document record is created, and the error will be displayed. APTAWEB-9909
- **Leave**
  - **AESOP Import:** All records that succeed the import show up as Taken records on Leave Details. They also correctly pull in the Substitute name and is editable to change the substitute. The Import also now has validation to make sure the imported leave does not exceed what is currently available. APTAWEB-11479
  - **** Leave Types – Include on Register:** Leave Types can now be configured so they can be approved but **not** imported into the register when using the "Update Leave to Register" command in the Register Details screen. The new field "Include On Register" can be found in the Edit Group Leave Type pop-up in Manage Leave > Leave Type > Employee Group. The default is "Yes" which will include the Leave Type on the Register. Changing this to "No" will not include the Leave Type on the Register when importing leave. APTAWEB-11916
  - **Leave Balance Grid:** Added "Hire Date" as a column in the Leave Balance grid and is included in the Leave Balance grid reports. APTAWEB-12103
- **My AptaFund**
  - **My Documents:** My Documents screen on ESS has been updated with "Acknowledgement Date" added to the grid. When the document is acknowledged, the column will display the date of acknowledgement. If it is not acknowledged yet, it will remain blank. APTAWEB-8357
  - **** Reports – Bank Reconciliation Report:** The parameter Accounting Cycle is now a multi-select box that will allow up to two cycles, selecting more will result in an error. The report will create multiple GL Detail Tabs, one for each cycle that has data to display. The "Actual GL Detail" tab will now be named "Actual GL Detail [Accounting Cycle]" to show the different cycles. In addition, the "GL Reconciliation" tab will include a column for both fiscal years if more than one fiscal year is chosen. APTAWEB-10999
- **State Specific**
  - **Nebraska**
    - **** NPERS Report**: When the "Use Default Hours" parameter is set to NO, this report will check to see if there are hours available from AptaFund Timekeeping and if there are, use those hours. If no hours are available, it will run just like before. **NOTE:** This is only implemented for Hourly/Daily job types. APTAWEB-12022
    - **** NPERS Report**: New parameter added to report "Salaried Jobs Based On". AptaFund defaults this to *Payable Days* which uses the payroll period's Payable Days * Hours Per Day for the Hours. User also has the option to select *Contract Days,* which uses the job's Contract days * Hours Per Day for the Hours. **NOTE:** This is only implemented for Salary job types. APTAWEB-12093

- **** NE Unemployment Insurance Tax Report**: Updated format and fields to meet current standards. For the report: APTAWEB-7125
    - Employee Name is expanded to First Name, Middle Initial, and Last Name.
    - Added "Hours Paid" field which has the sum of Regular, OT, Leave and Holiday hours from the paid registers during the quarter. This includes all jobs for the employee.
    - Added "Job Title" field which uses the Primary Job of the employee during the quarter.
- **** NE Unemployment Insurance Tax Export**: CSV export file updated to meet new specifications include the following: APTAWEB-7125
    - Required: EAN Employer Account Number – This has a new parameter in *Payroll Configuration* that is **required** to set up. This parameter is not cycle specific and should be 10 digits long. If this is left blank, an error message will pop up saying it must be set up.
    - Required: Filing Quarter Year YYYY and Quarter Q
    - Required: Social Security Number
    - Required: First Name
    - Required: Middle Initial
    - Required: Last Name
    - Required: Gross Wages
    - Required: 1st Monthly Employee Count
    - Required: 2nd Monthly Employee Count
    - Required: 3rd Monthly Employee Count
    - Optional: Hours Paid
    - Optional: Job Title
- **Transaction Journal:** When adding a transaction to the Transaction Journal, the Temp Transaction Number has been removed from the comment for current and future uses. APTAWEB-9826

Bugs Fixed

- **Accounts Payable – Payment Management:** Fixed an issue which resulted in a mismatch of number of selected records shown in the counter. APTAWEB-8555
- **AptaFund Timekeeping:**
    - Importing Leave Hours into the payroll register no longer overwrites Holiday Hours after importing the hours from AptaFund Timekeeping. APTAWEB-12036
    - Fixed an issue where hours imported from AptaFund Timekeeping were sometimes doubled for all employees. APTAWEB-12061
- **Create Leave Accruals:** This action was incorrectly prorating leave for new employees when creating leave accrual records. AptaFund no longer uses hire date to prorate, and only looks at FTE to prorate if the "Prorate by FTE" setting is YES in the Edit Group Leave Type screen. APTAWEB-11766
- **Employee Contracts Report:** Fixed an issue where Designation, Employees, and Job Comment parameters were not displayed correctly for certain Contract Types. The dropdown for Designation was also fixed to make sure the options "All" or "None" were always on top. APTAWEB-10070

- **Leave Details:** The Request pop-up now includes all days in the "Leave Dates" field. Previously half days or greater than a single day would result in error. APTAWEB-11956
- **Leave Reports:** The New Leave reports have been removed from My AptaFund > Reports and are available in their respective Leave Details and Leave Balance screens. The pertaining reports are Leave Taken Details by Type, Leave Taken Details by Employee, Leave Accrual Details by Type, Leave Accrual Details by Employee, Day of The Week Leave Details, Employee Substitute Report, Leave Liability, Leave Balance by Type, Leave Balance by Employee, and FYE Employee Leave Balance Rollover. APTAWEB-11053
- **** Leave – Employee Substitute Report:** Leave requests with a substitute attached that are cancelled, will no longer show up on the Employee Substitute report. This is done by removing the substitute attached to the leave request. **Note:** This will only affect requests cancelled after this change. Also, once the sub is removed there will be no record of the sub tied to the cancelled request. APTAWEB-11637
- **Master Position:** Fixed an error when attempting to create a new Master Position with all the required fields and no Designation, which would result in no Master Position being created after clicking "Save". APTAWEB-12038
- **My AptaFund – Reports**
  - **SSN Verification Report**: No longer has an error when an employee has either First Name, Last Name, DoB, or Employee Number blank. APTAWEB-12078
  - **Payroll Register Payments Report**: Under the Paycheck Detail section of this report, rows for Holiday Hours and Leave Hours are now shown with the Rate and Hours only. APTAWEB-12081
  - **Paycheck Stub Report**: Updated to display leave taken during pay period to pull in records that fall within the Payroll Period Timesheet Start and End Date instead of the Payroll Period Start and End Date. Column titles in the Leave Block have been changed to "Leave Type", "Period Accrued", and "Period Taken". APTAWEB-11894
- **Payroll – Deduction Assignment**: Users can now delete/copy more than one deduction set at a time on the screen. APTAWEB-6814
- **Payroll – Paystubs:** Hourly Paystubs that include Holiday Hours have had various calculations corrected. APTAWEB-12074
- **Payroll – Manage Payroll:** Fixed an issue which resulted in a mismatch of number of selected records shown in the counter. APTAWEB-8555
- **Payroll – Payroll Voucher Management:** Fixed an issue which resulted in a mismatch of number of selected records shown in the counter. APTAWEB-8555

New & Revised Topics in the Online Help

New topics

Payroll > Pay Employees – Manage Payroll > Process a Payroll > Adjust pay when necessary > Import Leave Hours Into Register

General > Navigation > Shortcut Keys

AptaFund Timekeeping > Set Up AptaFund Timekeeping

AptaFund Timekeeping > Importing Hours to Payroll Register

Revised topics

Payroll > Pay Employees – Manage Payroll > Process Payroll > Adjust pay when necessary > Enter Employee Time Overtime - Overview