




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

To submit an idea for product enhancements/improvements, click [Here](#).

Technical Documents

Issues with an asterisk (*) have a technical document available on Team Support and in the online help.

Issues with a  denotes this feature came from the idea portal.

Improvement

Capital Assets

APTA-1389

Capital Assets: Enhancements have been made to improve the asset acceptance process.

Required fields are now clearly marked with a blue asterisk, accompanied by a footnote to remind users of their significance.

Reports

APTAFUND-4123

403(b)/457(b) Plan Report: A new parameter, "Taxable Benefit to Employer Contribution," has been added. When set to "Yes," the report will now include employer contributions related to taxable benefits, providing greater visibility into total employer contributions.

AFD-483

Maine: Paid Family Leave Report: The report format has been updated to comply with the latest reporting standards set by the State of Maine, ensuring compatibility for successful upload.

AFD-497

New Hampshire Retirement Reporting: The report has been enhanced to use the Participation Start Date as the Participation Date, replacing the previously used Hire Date. This update ensures more accurate reporting in line with retirement plan requirements.

APTA-821

PA AFR Reporting: A new reporting format for the PA AFR is currently in development. As a first step, we are upgrading the legacy report to align with our modern grid report standards, paving the way for future enhancements.






New Feature

General Ledger


APTAFUND-4120

GL Normal Screen – Enhanced Account Code Drill-Down: Based on feedback from the Idea Portal, we have improved the review process for account codes, budgets, and transactions, new functionality has been added to the GL Normal screen. Account codes are now hyperlinked—clicking a hyperlink opens a pop-up displaying transactions and their associated sources. Users can further drill down into these sources, including Purchase Orders, Payroll Register, Payroll Liability Vouchers, and Cash Receipts, enabling detailed review of Revenue, Expenditure, and Payroll account codes. 

See Tech Doc

Human Resources

APTAFUND-3442

Employee Contacts – Relationship Field Added: Based on feedback from the Idea Portal, a new Relationship field has been introduced for employee contacts. This field is now available in the Employee Contacts tab, as well as in the My Information, Request for Changes, and Request for Changes Approval screens within ESS. 

APTA-57

Master Position Management: A new feature has been introduced that allows users to copy a master position. This enhancement is designed to streamline workflows and improve operational efficiency.

See Tech Doc


Payroll

APTAFUND-4012

Deduction Details: Previously, when Jobs/Addenda were set to "All," the system did not allow the OT selection to be set to "Yes (Straight Pay)." This functionality has now been added, enabling greater flexibility in configuration.

Purchasing

APTAFUND-4013

Purchase Orders – Email to Vendor Option: In response to an Idea Portal suggestion, a new feature has been added that allows users to automatically email a copy of the Purchase Order to the vendor upon printing. This enhancement supports improved workflow efficiency and communication. 

See Tech Doc





Reports


APTAFUND-4044

Account Summary Break Report – Budget Category Sorting Enhancements: Based on feedback from the Idea Portal, new parameters have been introduced to allow sorting by Budget Category. Users can now choose to group by All, None, or select specific categories. Additionally, the Break option can be configured to group by either Budget

Category or Element, offering more tailored reporting options  [See Tech Doc](#)

AFD-426


Proposed Budget Report – Enhanced Sorting Options: In response to an Idea Portal suggestion, new parameters have been added to the Proposed Budget Report to enable sorting by Budget Category. Users can now choose to group by All, None, or select specific categories. Additionally, the Top Subtotal option can now be set to group by

either Fund or Budget Category, offering greater flexibility in report organization. 

[See Tech Doc](#)

AFD-531

Account Summary Report and Account Summary by Elements Report: Budget Category Sorting Enhancements: Based on customer feedback, we've enhanced the Account Summary report by adding the option to subtotal by Budget Category. Additionally, the Account Summary by Elements report now allows you to choose between reporting on

All Accounts, All Budget Categories, or specific Budget Categories.  [See Tech Doc](#)

