Financial Enhancement GL-PCR Closed Epics (HUIT Jira)

Project: ATS - Financial Management Systems
Type: Epic
Status: Closed
Sorted by: Resolved descending, then Updated descending, then Key descending, then Status ascending, then Priority descending
1–**29** of **29** as at: **23/Nov/26 9:23 AM**

Key	Summary	Description	Status	Resolved
FMS-9605	GL-PCR Add Descriptions for all Fields in Reclassification	Goal is to add descriptions for all segment values in GL-PCR Reclassification if possible. Issue detail: When picking the source Org & the target Org when completing a Reclassification, the Org number & description appear. But when picking the source Fund or Activity & target fund or Activity only the account code appears.	CLOSED	12/ Nov/26
FMS-5941	GL-PCR Update Line Description in Adjustments	Line descriptions currently default to the batch description entered in the GL-PCR tool, a request has been made to use the original line description from the HART Report (Reg/OT/VAC)…. Could pull the description from the original transaction and default the line description to it.	CLOSED	10/ Nov/26
FMS-15208	GL-PCR Process Batch Fix	Currently when a user edits the GL Effective Date to the current open period and submits the batch without saving first, the batch will attempt to process with the previous GL effective date that is in a closed period. This fix will prevent users from submitting GL-PCR batches in previous closed months.	CLOSED	03/ Nov/26
FMS-14444	GL-PCR Disable Save Button after Clicking Once	Currently, when a user clicks the save button multiple times in a short time frame in GL-PCR, it can lead to the batch duplicating and not being able to submit. The goal is to have the Save button disable immediately after the first click. This will eliminate the possibility of multiple save requests being processed.	CLOSED	03/ Nov/26
FMS-13554	GL-PCR Effective Date Change	Currently, when a user sets a GL Effective Date that is different than the current date. The GL registers it as the current date in the following fields: Journal Date Created, Journal Effective Date, and Batch Date Created. The goal is to have the GL Effective Date save off as the date the user enters when creating and submitting a GL-PCR batch.	CLOSED	30/Oct/26

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FMS-14691	GL-PCR Mapping GL-PCR Source to Payroll Month	In GL-PCR, when reviewing the Payroll Month field, it appears to show the Payroll month for PYRL009-PS On-cycle Pyrl but not for GLJE010-ADJ Entries. The goal is to have the Payroll Month field carry over for the GL-PCR journal source GLJE010-ADJ Entries. This enhancement will need further assistance from the HART team to ensure the HDW does carry GLJE010-ADJ Entries through	CLOSED	29/ Sep/26
FMS-14141	Improve post-Qtrly-patching issue with materialized view	We currently have an issue with the HUGL Refresh Journal Adjustment Materialized Views in EBS that occurs after patching where DevOps has the rebuild the views manually. We want the changes made to be as automated as possible. Is this something we can do on our end or devops. Ravinder and Jasvinder to sync on it. Workaround, hold job ahead of patching would this eliminate this.	CLOSED	01/ Sep/26
FMS-13837	GL-PCR Mass Adjust Re-Calculate Dollar Amount	When a user completes a Mass Adjust within GL-PCR, if the Mass Adjust is completed with the dollar amount, it will not show the exact dollar amount as the user enters after completing the Mass Adjust. The goal is to have the logic in Mass Adjust to use the dollar amount entered by the user without shifting the amounts originally entered.	CLOSED	21/ Aug/26
FMS-14748	GL-PCR Add Reversal Batches to Submission Audit Report	With the new submission audit report apex page created to show GL-PCR batches, the output only shows submitted batches and does not include reversal batches. The goal is to add reversal batches to the audit report.	CLOSED	18/ Aug/26
FMS-14352	GL-PCR Post Audit Report	In GL-PCR there is no report that determines who creates and submits a batch but it is available in the GL-PCR apex page when a user searches a desired batch. The goal is to have a report on who is submitting GL-PCR batches along with the Batch Name, Batch ID and Batch Description Change Primary D	CLOSED	14/ Aug/26
FMS-14491	GL-PCR Entry Submission Summary	Currently, there is no summary report that tells which users have submitted a batch or journal based on HUID and tub affiliation. The goal is to have a report	CLOSED	30/Jul/26

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	Report	that can be ran to show a list of users that have submitted a batch or journal based on HUID, journal source, and tub affiliation. This allows communication with the Central Finance Department to post and ensure departments are not submitting GL-PCR entries.		
FMS-14495	GL-PCR - code change to check active edition first	GL-PCR views fail after quarterly Oracle patching due to the database edition variance. Met with Jasvinder and Ravinder, and decided to take two approaches: 1. In the short term, put the concurrent job that refreshes the views on hold during the Oracle patching period - Nan and the on-call developers with include it in the job-hold list. 2. In the long term, add code in the program to check the active edition first - Fujitsu team has the task.	CLOSED	21/Jul/26
FMS-13945	GL-PCR Duplicate Lines Fix	Currently in GL-PCR, when a user wants to add additional lines to a saved batch, the new lines along with the lines from the original saved batch will create a new batch. This is a major issue because lines should not be able to duplicate for possible double submission. The goal is to have the ability to add lines to the current batch along without creating a new separate batch.	CLOSED	08/ May/26
FMS-3898	GL-PCR Update title in Mass Adjust	In the Mass Adjust section 2, update the words “Acct Desc” to read “Accounts to use” or remove the words “Acct Desc” and any function next to it. Users can see the account description when choosing the segment values.	CLOSED	27/Apr/26
FMS-3666	GL-PCR Show Batch IDs Clearly in "Your Recent Batches"	As I user, I want to be able to see the batch IDs for my recent batches without having to enter the search page. Attached is a screenshot of how the batch IDs are currently being covered by long batch names. See attachment for example screen shot.	CLOSED	27/Apr/26
FMS-12379	GL-PCR Update link to User Guide	Since our web site migrated to Drupal, the link to the GL-PCR User Guide from within the GL-PCR tool needs to be updated.	CLOSED	27/Apr/26
FMS-13208	GL-PCR Reduce use of AOP report executions	In GL-PCR reduce the use of AOP report executions from APEX by converting the download report to Excel, if possible.	CLOSED	27/Apr/26

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	from APEX	We use APEX Office Print (AOP) in our Financials Apex Applications. This is used to created formatted Output from APEX in either Excel or PDF format. Some of the applications that use this report include • GL PCR (accounts for 95% of usage and spikes during quarterly close) • Fixed Asset Workbench Report • Oracle MC – to generate University Invoice • Credit Card Database • Bank Database Product Owner for the University subscription for AOP, which is finite number of report execution per month. For Financials system, the threshold kept is 75 reports per day. We should analyze ways to reduce our usage of AOP.		
FMS-1840	GL-PCR Add tabbing ability to search screen	Add the ability to hit "tab" to move between fields in the search screen.	CLOSED	21/Apr/26
FMS-12321	GL-PCR Add Payroll Month with adjustment to HART via the GL	Currently when adjusting a line in GL-PCR, the payroll month field is not included with the adjustment lines sent to the GL. The goal is to have the payroll month stay with the transaction to the GL once it has been adjusted so it will show in HART and come back into GL-PCR with the adjusted line.	CLOSED	19/ Mar/26
FMS-11759	GL-PCR Add Root Segment in Reclassification	Currently, Root is not available in the Reclassification Tab in GL-PCR. This is due to root being used for capital assets, but root can be used for faculty payroll purposes. The goal is to add root coding and limit it to only the faculty range within the Reclassification tool.	CLOSED	12/ Feb/26
FMS-11017	GL-PCR Remove Accrual Lines in Reclassification	When completing a Reclassification, do not allow accrual lines. Exclude where user_je_category_name like '%Accrual%'	CLOSED	08/ Dec/25
FMS-1846	GL-PCR High congestion search screen behavior	On the search screen (during high congestion) deselecting the subactivity is slow or not possible at all. To get around this, the clear button can be used and the fields must be re-filled.	CLOSED	26/ Sep/25

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FMS-3959	GL-PCR Allow the sections of an adjustment to expand in pop-up windows	Adjusters submitting multi-line adjustment batches currently have a difficult time sorting through the lines. Adding the ability to expand the *Selected Adjustment lines* and *GL Adjustment - Details* sections of an adjustment within a pop-up window would make navigating an adjustment easier for the adjuster.	CLOSED	25/ Sep/25
FMS-8143	GL-PCR Funding Change Reclassification- Prevent the user from reclassifying funds based on business rules	From the Demo with HBS for the new GL-PCR Funding Change Reclassification as part of the https://at-harvard.atlassian.net/browse/FMS-2040 project. This request isn't in scope for the S&W Flux project, but for backlog. User Story: As a staff who wants to reclassify funds, I want the system to prevent me from using object codes 6052 and 6072 in the GL-PCR Funding Change Reclassification. Those object codes are for vacation reimbursement. Data integrity, error prevention.	CLOSED	25/ Sep/25
FMS-9091	GL-PCR Export Lines Outside of Responsibility	Gain the ability to print/export a GL-PCR batch even with tubs that are not accessible to user to view line items outside of someones security and responsibility. Viewing of line items outside of someone's current security might not be plausible. GL-PCR is based upon HART and GL security, and not sure we can over-ride security to download. Currently, when the user selects the "download batch" button, based on the current responsibility, nearly-blank Excel file appears. The spreadsheet it shows the headers but not any of the actual rows that normally would show the original, reversal, and adjusted line.	CLOSED	25/ Sep/25
FMS-4190	GL-PCR Balance High Cost Mass Adjustments	The GL-PCR has a problem when large quantities are adjusted. IT appears as though (behind the scenes) the tool is taking the dollar value entered by the user and converting it into a percentage. This conversion is causing the dollar value entered by the user to be changed by the tool when the Mass Adjustment is actually applied. As a result the dollar values are not as expected and users that do not carefully review their adjusted lines are liable to submit an inaccurate adjustment.	CLOSED	25/ Sep/25
FMS-2240	GL-PCR Delete the batch Enhancement	Add option for users to delete the batch via a Batch Delete button. If there are lines in the batch, a pop-up will ask user to remove the lines from the batch. And	CLOSED	25/ Sep/25

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		if there are no lines left, the batch is deleted without a pop-up..		
FMS-4169	GL-PCR Block the deletion of lines from submitted batches	We are experiencing GL rejections from Oracle when a batch is submitted and all of it's selected lines are deleted prior to the batch being imported by the GL. This behavior is possible during a short timeframe, between when the batch is submitted in the GL-PCR and when the GL import runs. By deleting the lines, existing data from the GL-PCR tables is also cleared. Then when the GL import runs every 30 minutes, there is no data associated with the batch in the tables. The error we get is the import is rejected because it is "does not contain any lines, 2 or more lines".	CLOSED	22/ Sep/25
FMS-3958	GL-PCR Add line numbers to the Selected Adjustment lines section of the GL-PCR	Adjusters submitting multi-line adjustment batches currently have a difficult time sorting through the lines. Adding an Adjustment Line number column that correlates the lines in the two sections will make it easier for adjusters to navigate their batches.	CLOSED	22/ Sep/25