1Q Adm Rpt Analytics Backlog PUBLIC (HUIT Jira)

JQL Query: project = FMS AND component = "1Q: Adm Reporting & Analytics" AND issuetype = Epic AND status NOT IN (Closed, "Validate in Production") and "Requester Group[Dropdown]" IS not EMPTY and "Requester Group[Dropdown]" IS NOT EMPTY ORDER BY fixVersion ASC, status DESC, issuetype DESC
Sorted by: Fix versions ascending, then Status descending, then Issue Type descending
1–**52** of **52** as at: **08/Sep/26 2:40 PM**

Key	Summary	Description	Status	MOSCOW Priority	Fix version
FMS-14979	Candex Vendor Name Reporting	Candex Vendor Name Reporting	REQUIREMENTS AN...	Must Have	
FMS-13772	HR/Finance Data Governance	Efforts and engagement related to the HR/Finance Data Governance initiative	REQUIREMENTS AN...	Should Have	
FMS-13700	Finance Self Service Data Model Improvements	Improvements to enhance the model's usability by being more user-friendly and intuitive and business oriented. Need to enhance self-service, dashboards, and rollups for University leaders and managers; enhancing self-service usability across the finance community	REQUIREMENTS AN...	Must Have	
FMS-12360	S&W Flux Report	Create a S&W Flux report that compares salary costs year over year. Not including budget data.	REQUIREMENTS AN...	Should Have	
FMS-11460	IPIT (Integrated Planning of IT) Report	Create a Data Visualization Dashboard to look back at IT spending to understand how much the schools / units spend on IT, and to understand what portion of that is under CIO control vs. not and how it maps to the mission.	REQUIREMENTS AN...	Must Have	
FMS-14717	HART MC Dashboard – Bug Fix Sprint	Resolve the identified defects in the HART MC Dashboard that were discovered during testing. This epic encompasses the investigation, validation, and deployment of fixes for the reported issues to ensure the dashboard functions as expected and meets quality standards.	READY FOR DEVEL...	Must Have	
FMS-14692	Carry GL-PCR Payroll Source to HART	Map Journal Source "GLJE010-ADJ Entries" to show "Payroll Month" in the Transaction Listings reports. The data is located in the Local Attribute 1 field, after the caret. Example of fiscal month data for GLJE010-ADJ Entries in HUDW.Dw_Transaction_Details_F_Sv.FEEDER_SYSTEM_RF1: 1 ^05 Currently, payroll journal sources are mapped in the Transaction Listings report to display Payroll Month from Local Attribute 1 field, after the first caret. It is desired for the GL-PCR journals be mapped in a similar way.	READY FOR DEVEL...	Should Have	
FMS-14781	Duplicate Vendor Name in SS iProcurement	When pulling Vendor Name from Dim-AP Checks, duplicate vendor names show up for the same vendor.	IN DEVELOPMENT	Should Have	
FMS-14038	RPD Learning, Practice, and Implementation	Epic focuses on developing knowledge and practical expertise in Oracle RPD (Repository Development) through structured learning, hands-on practice, mentorship sessions, and self-study. Activities include understanding RPD architecture, metadata modeling, physical/business/presentation layers, repository development, validations, and implementation	IN DEVELOPMENT	Should Have	
FMS-14032	HART Report Training & Knowledge Sharing	(1) Meet with Meng for cross training on supporting the HART CAPS reports, building reports net new, and troubleshooting/enhancing existing reports. (2) Attend Harvard Training Portal Classes	IN DEVELOPMENT	Must Have	
FMS-13801	Align PO line No	Add PO LAdd PO Line Number into iProcurement Self Service areaine Number into iProcurement Self Service area	IN DEVELOPMENT	Could Have	
FMS-12901	ADMIRE Project FMS FY26	FMS Financials HART team to support ADMIRE project: connectivity testing, UAT testing, regression, and functional testing.	IN DEVELOPMENT	Must Have	
FMS-14062	AI in DV Reporting	AI in DV Reporting, investigate how we can use it, make efficiencies.	BACKLOG	Should Have	
FMS-14021	SS Basic Finance - Plan Working Column Performance	The Plan Working column is much slower to return results than columns from the Period Balances, like Actuals.	BACKLOG	Should Have	

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FMS-14016	Duplicate information in TL dashboards	**AP-PCard Transaction Report ID (great enhacement** and the **AP-PCard Transaction Reviewer HUID** for the Transaction Listing All, Summ Comp, and Limited Comp reports is pulling the same data details.	BACKLOG	Should Have	
FMS-13747	Calculation Change related Enhancement on Eh&S Dashboard	A couple of changes: 1. % column will not be calculated on the dashboard but coming from CPATH instead. 2. add a concatenated field to help user to reference to GL data. might include RPD change - will have more info once the business requirement is finalized.	BACKLOG	Should Have	
FMS-13543	Enhancement on Eh&S fee dashboard	Add a page that allows user to see the history of selected CIP(s).	BACKLOG	Should Have	
FMS-12790	Build Self Service Area for CAPS	To allow dynamic reporting needs for CAPS data.	BACKLOG	Should Have	
FMS-12789	Label nondescript fields in iProcurement Self Service for clarity	To label nondescript fields for clarity	BACKLOG	Should Have	
FMS-12359	Add Fund Terms to the Fund Management Report	Want to include Fund Terms as a column inside of the Fund Management Report.	BACKLOG	Should Have	
FMS-11464	Self Service: Create Glossary of Columns and their Definitions	Create a glossary page with definitions for self service area.	BACKLOG	Could Have	
FMS-11295	Budget and Actuals Comparison: Make the End Period Prompt default to Most Recent Opened Period (via INC05890362)	User was running the Budget and Actual report in FIN-Core and noticed that the period begins with JUN-97 and then the last selection is JUN-26, so selecting the current period was burdensome. Wants to know if there is an opportunity for the current period to be displayed at the top? **Team Note**: In many of the Finance dashboards, we default the Prompt to display either the Most Current Open Period or the Last Closed Period. This also means if a user wants a different period, when they click to select, they will be in the range of the list of current year Periods for less scrolling.	BACKLOG	Could Have	
FMS-11009	Self Service: Can Agents Run and Send/Run Specific Dashboard Pages	Can an Agent print the results on the second page of a dashboard to PDF based on prompts that go into the first page of a dashboard? /agents and dashboard prompts do not interact, but agents can print pages of a dashboard/ **Team Note:** Needs investigation and research to find out how/if this can be done.	BACKLOG	Could Have	
FMS-11008	Self Service: Use Amount Columns from Summary and TL Detail Together in an Analysis	We'd like to be able to use columns like "Actual Net For Period" and "Transaction Amount Sum" in the same Analysis, however, it will give an error. Currently, have to use a lot of convoluted "tool tricks" to drill from Summary to Detail.	BACKLOG	Could Have	
FMS-11000	Detail about Concur Expense and PCard transactions in process	Detail about Concur Expense and PCard transactions in process	BACKLOG	Could Have	
FMS-10995	Include description and rollup consistently for chart values across HART	Cross-Dashboard: Anywhere there is a chart value, have its description and rollup	BACKLOG	Could Have	

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FMS-10994	Cross-Dashboard: Allow all values and then remove 1 or more (Similar to a Pivot Table in MS Excel)	Cross-Dashboard: Allow all values and then remove 1 or more (Similar to a Pivot Table in MS Excel)	BACKLOG	Could Have	
FMS-10993	Limit Tubs in Drop Down list to the Tubs the user has access to (e.g. Committed Funds report)	Limit Tubs in Drop Down list to the Tubs the user has access to (e.g. Committed Funds report)	BACKLOG	Must Have	
FMS-10828	Transaction Listings: Add Semester and Quarter Time Period Columns	From Tim Loftus: I was talking with a colleague today about HART Transaction Listing reports, when she mentioned it would be awesome if there was a way to group the data for fall vs. spring semesters. I thought it was a pretty cool idea and it got me thinking if this, or something similar could be added as a data point to HART transactions to further segment the time periods. I was wondering if there was a way to assign the semester, or even the quarter to transactions using the existing “Period” HART column? I would envision this to function by looking at the data already in the “Period” columns and then assigning new columns for Semester and Quarter as described below: **By Semester** • Fall 20XX Semester: July 20XX through December 20XX • Spring 20XY Semester: January 20XY through June 20XY **By Quarter** • FYXX – Q1: July 20XX through September 20XX • FYXX - Q2: October 20XX through December 20XX • FYXX – Q3: January 20XY through March 20XY • FYXX – Q4: April 20XY through June 20XY I think there are a number of reporting advantages to having the Semester and Quarter labels for each transaction, so I figured it was worth mentioning. I have no idea from a technical standpoint how feasible this would be and want to share that this is definitely a “nice to have” request, and in no way a necessity. Interested to get your thoughts on if you think this is an idea worth pursuing. **Team Note:** This would need Database, RPD, and Dashboard design and implementation efforts. As well as more user outreach and communication.	BACKLOG	Could Have	
FMS-10784	Labor Variance Reporting (Salary and Wage Flux)	Need Salary and Wage rebuild to enable reporting on salary changes.	BACKLOG	Should Have	
FMS-10696	Include Federal Grants in the Fund Management Dashboard	Fund Management dashboard currently does not include Federal Grants (FG) funds. User would like to have FG funds available on this dashboard.	BACKLOG	Could Have	
FMS-10477	Self Service: Having Variance and Business Purpose Columns available in SS Procurement area	To add Variance columns and Business Purpose to the SS Procurement area.	BACKLOG	Should Have	
FMS-10279	Self Service: HMS Vendor Invoice Detail Dashboard	HMS wants to create a the Vendor Invoice Detail report and wants to know which HDW views and tables it uses and any logic or calculations are used to create columns, such as Discount Amount.	BACKLOG	Could Have	
FMS-10264	Self Service: Add Vendor Site Dimension for Transaction Actuals	Add Vendor Site dimension to TL Actuals so that users can filter and/or include Vendor info.	BACKLOG	Should Have	

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FMS-10242	Self Service: Create self-service for HART MC for Harvard Global	Users want the ability to create their own Customize reports. SS Tool for HART MC will enable finance analysts and managers or any other User who wants to generate, customize, and share reports on demand can use this tool and can create reports by their own which help in increasing visibility into key performance metrics. Launch (HART release schedule here: https://at-harvard.atlassian.net/wiki/spaces/ARAP/pages/11960558/Release+Management+Process)	BACKLOG	Could Have	
FMS-10236	Monthly HURA Reports for External Party	Monthly HURA Reports for External Party	BACKLOG	Must Have	
FMS-10136	Enhance Finance Self Service Security Model to Broaden Usage/Sharing of the reports	Enhance Finance Self Service Security Model to Broaden Usage/Sharing of the reports	BACKLOG	Must Have	
FMS-10007	Self Service: Share Alternate Hierarchies between HUBS and HART	There are many hierarchies in HUBS that could be used by Finance Self Service users creating their own custom dashboards.	BACKLOG	Could Have	
FMS-10005	Self Service: Add Page Breaks in Analysis	**Team Note:** Needs investigation and research to find out how/if this can be done.	BACKLOG	Could Have	
FMS-9696	Self Service: Enable self-service model to be used with the limited comp and summary comp detail without payroll	Allow for more granular security for SS Basic Finance Data model so that more users can access it and share with others. Blank out 13 TA Inclusive columns containing sensitive payroll related detail info using existing HART DAC Roles: • DTL-All - Display all column detail content including in payroll object codes (G601, G624) • Summ Comp - Blank out all 13 column detail contents in payroll object codes (G601, G624) • LTD Comp - Display column detail content for certain payroll object codes ('6100', '6110', '6120', '6129', '6140', '6150', '6152', '6260', '6261', '6262', '6300'), otherwise, blank out Payroll Related Columns: 1 Line Desc. 2 HUID 3 HUID Name 4 PYRL - Payroll-Department ID 5 PYRL - Payroll-Earnings Type Code 6 PYRL - Payroll-Employee Record 7 PYRL-Payroll-Job Code 8 PYRL - Payroll-Paycheck Date 9 PYRL - Payroll-Paycheck Number 10 PYRL - Payroll-Pay End Date 11 PYRL - Payroll-Pay Group 12 PYRL - Payroll-Position Number 13 PYRL - Period of Work Performed • Example dashboard illustration can be found at: SS Finance Shared > ATS-FMS > TL Test > TL Transactions Demo 2 • Example columns pseudo code: CASE WHEN "TL Transactions"."Giga Num Name" IN ('G601 Salaries+Wages', 'G624 Employee Benefits') AND "TL Transactions"."USER CR" = 'DTL' THEN "TL Transactions"."Huid" WHEN "TL Transactions"."Giga Num Name" IN ('G601 Salaries+Wages', 'G624 Employee Benefits') AND "TL Transactions"."USER CR" = 'LTD' AND "TL Transactions"."Object Code" IN ('6100',	BACKLOG	Could Have	

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		'6110', '6120', '6129', '6140', '6150', '6152', '6260', '6261', '6262', '6300') THEN "TL Transactions"."Huid" WHEN "TL Transactions"."Giga Num Name" IN ('G601 Salaries+Wages', 'G624 Employee Benefits') THEN 'No Access' ELSE "TL Transactions"."Huid" END See attached screenshots for illustrations/examples. **Team Note:** This work had begun but was put aside to implement Harvard Global. Possible for a AUG-27 release.			
FMS-9633	Self Service: Add a "Actual Net Fiscal Quarter End Column"	To simplify Quarterly reporting/calculations, add a “Actual Net Fiscal Quarter End” fact column in the “Hierarchical” section that presently already includes “Actual Net for Fiscal Quarter”. And to be consistent with the Period Begin, Net, End convention, we can create a “Actual Net Fiscal Quarter Begin” column.	BACKLOG	Could Have	
FMS-8672	Self Service: Include Concur and PCARD data in Data Model	Add PCARD and Concur data inside of Financial Self Service reporting.	BACKLOG	Could Have	
FMS-8669	Self Service: Add Fiscal Year close dates	Add the DWGL.DGL_FY_CLOSINGS_D close dates to SS Basic Finance so users can use with Transaction Actuals and report on each of the five closes.	BACKLOG	Could Have	
FMS-7124	Self Service: Create New Budget Facts for Plan.Draft 1, Q1 and Q2 Forecast	Users want the ability to have additional Budget Facts to use in Self-Service. Similar to the creation of **“Budget Final”** (Scenario = “Budget”, Version = “Final”), create **“Plan Q2 Forecast”** (Scenario = “Plan”, Version = “Q2 Forecast”) and **“Plan Q3 Forecast”** (Scenario = “Plan”, Version = “Q3 Forecast”) facts.	BACKLOG	Could Have	
FMS-6760	Self Service: Ability to Export to SharePoint	User has created a Dashboard with multiple Analysis that he wants to share with members of his Team. He’d like the ability to Export the results to a local SharePoint directory. Similarly explained here: https://community.oracle.com/products/oracleanalytics/discussion/10247/oac-export-report-to-sharepoint-onedrive-ms-teams-with-password-protection **Team Note:** Needs investigation and research to find out how/if this can be done.	BACKLOG	Could Have	
FMS-6603	Self Service: Dashboards Using Relative vs Absolute Paths for Objects	When a user creates a dashboard in one folder, say My Folders, and moves/copies it to a new folder, say SS Basic Finance Shared, the objects within the dashboard continue to point to those in the original folder. When sharing the dashboard with others, they will not see any objects as they do not have access to the authors My Folder. In order to have the dashboard to point to the right objects, the author has to replace all of them from those in the new folder. If moving from other Shared folders the users do have access to, it will be very unclear to all the actual source of the objects. Here is a link to Oracle with the same issue which does not appear to be answered: https://community.oracle.com/products/oracleanalytics/discussion/686/obiee-12c-relative-path-to-the-objects-in-the-dashboard **Team Note:** Needs investigation and research to find out how/if this can be done.	BACKLOG	Could Have	
FMS-6586	Self Service: Ability to Filter Multiple Objects Independently of one another	Users have multiple views in their analysis and he wants to filter each view differently. Currently, if a filter is placed on a dimension in one view, it cascades across all of the views. Explored workaround is to create duplicate dimensions, for instance Object 1, and Object 2, but this gets too hard to handle when needing to do it for more than one dimension (needs it for Fund, Activity, etc.)	BACKLOG	Could Have	
FMS-5943	Self Service: Point in Time reporting including investments	Add Concur and PCARD data for Self Service reporting.	BACKLOG	Must Have	
FMS-5908	Self Service: Activity-SubActivity Dim - Column Change	Replicate a SmartView report which uses a column that concatenates existing Activity and Subactivity columns: "Dim - Activities"."Activity"|| '-' || "Dim - Subactivities"."Subactivity" || ' ' ||"Dim - Activities"."Activity Description" || '^' || "Dim - Subactivities"."Subactivity Description". Creating this column in the RPD/Data Model would save a lot of user time and effort vs creating in the multiple Analysis.	BACKLOG	Could Have	
FMS-5893	DV Calculation "Unresolved Level" Error with	In DV, Custom Calculations have a problem using hierarchy values, like with our Periods Dimension using AGO Function. This is a known Oracle issue (apparently, they say by design). The same calculations using hierarchy values work fine in Analysis/Analytics. The workaround they provide is to use the full dimension name: “Dim-Periods”-”Period Name”	BACKLOG	Could Have	

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	Hierarchy Values (Platform)	vs just Period Name. This workaround does work but want to track as a possible fix since this is pretty anti-intuitive and will also cause errors when opening an Analysis in DV and their ability to talk back and forth. **Team Note:** Needs investigation and research to find out how/if this can be done.			
FMS-3673	Transaction Listing Dashboards: Add Vendor Name for transaction from Concur Travel and Expense Journal Source	As a user the AP department requests transactions coming in from Journal Source AP 016-Concur Entries have the AP Vendor Name populated on the Transaction Listing dashboards. This is found in HUGL.HUGL_CONCUR_SAE_LINES.RPT_ETY_VENDOR_DESCRIPTION	BACKLOG	Could Have	
FMS-2048	Transaction Listing - Add Business Purpose from B2Pay	Add "business purpose" field from Buy2Pay be added to the Transaction Listing report	BACKLOG	Could Have	