

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 ORDER BY fixVersion ASC, status DESC, issuetype DESC

Sorted by: Fix versions ascending, then Status descending, then Issue Type descending

1-53 of 53 as at: 17/Jun/26 11:33 AM

Key	Summary	Description	Status	MOSCOW Priority	Fix version
FMS-14172	Flux Analysis Dashboard: Add a Balance Sheet Tab	At a high level, the Dashboard is structured as follows: <ol style="list-style-type: none"> 1. Column A: OC code, with rollups at the Mega and Giga levels, as well as Tera-level totals for Assets and Liabilities. Equity accounts do not need to be included. 2. Column B: Current period balance 3. Column C: Prior-year balance, 12 months prior to the current period 4. Column D: Dollar change 5. Column E: Percent change 6. Column F: O/C responsibility, as currently defined in the attached file. FAR may refine this over the next month or two, and if so, we will share an updated mapping/request with you. 7. Column G: YoY notes, similar to the P&L template, with a text box for tubs to enter explanations for year-over-year fluxes.dd a modified version of the Balance Sheet to the dashboard to be used as part of the quarterly reporting process with FAR and Tubs 	REQUIREMENTS AN...	Should Have	HART 26.07
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.	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-10784	Salary and Wage Actual year over year rebuild	Need Salary and Wage rebuild to enable reporting on salary changes.	REQUIREMENTS AN...	Should Have	
FMS-13801	Align PO line No	Add PO LAdd PO Line Number into iProcurement Self Service areaine Number into iProcurement Self Service area	READY FOR DEVEL...	Could Have	
FMS-14039	Financial Rpt Stakeholder Mtgs June 2026	We have multiple financial reporting stakeholder meetings in June, list below. This epic is for internal meetings, presentation preparation, and work across the team to prepare. RPG 6/25 FRAWG 6/23	IN DEVELOPMENT	Must 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-14162	CAPS Fee Dashboard	Investigation on a couple of issues reported by user: <ol style="list-style-type: none"> 1. duplicate entry in April-26 and May-26 for three CIPs. 2. Approval date shows up differently compared to CPATH 	BACKLOG	Must Have	
FMS-14152	Data Issue in HART AP Spend	The issue is: "PO header id" column is blank. Rick also noticed the following:	BACKLOG	Must Have	

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	Analytics Dashboard	<p>"I also looked at the vendor count for that month and it looks wrong – says we paid only 725 unique vendors and that is far less than the amount of vendors we actually paid.</p> <p>I also do not understand report and what is supposed to show based on the confluence page – I mean just looking at it seems to be only businesses and not individuals and it is also missing a couple of pay groups like DIGITAL for people being paid electronically....."</p>			
FMS-14062	AI in DV Reporting	AI in DV Reporting	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	
FMS-14016	Duplicate information in TL dashboards	<p>AP-PCard Transaction Report ID (great enhancement and the AP-PCard Transaction Reviewer HUID for the Transaction Listing All, Summ Comp, and Limited Comp reports is pulling the same data details.</p> <p>(reported by Angel Velarde in FAS)</p>	BACKLOG	Should Have	
FMS-13747	Calculation Change related Enhancement on Eh&S Dashboard	<p>A couple of changes:</p> <ol style="list-style-type: none"> 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. <p>might include RPD change - will have more info once the business requirement is finalized.</p>	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)	<p>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.</p> <p>Wants to know if there is an opportunity for the current period to be displayed at the top?</p> <p>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.</p>	BACKLOG	Could Have	
FMS-11009	Self Service: Can Agents Run and Send/Run Specific Dashboard Pages	<p>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?</p> <p>/agents and dashboard prompts do not interact, but agents can print pages of a dashboard/</p> <p>Team Note: Needs investigation and research to find out how/if this can be done.</p>	BACKLOG	Could Have	
FMS-11008	Self Service: Use Amount Columns from Summary	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	

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	and TL Detail Together in an Analysis				
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	
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	<p>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?</p> <p>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:</p> <p>By Semester</p> <ul style="list-style-type: none"> Fall 20XX Semester: July 20XX through December 20XX Spring 20XY Semester: January 20XY through June 20XY <p>By Quarter</p> <ul style="list-style-type: none"> 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 <p>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.</p> <p>Team Note: This would need Database, RPD, and Dashboard design and implementation efforts. As well as more user outreach and communication.</p>	BACKLOG	Could 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	

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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																							
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: <ul style="list-style-type: none"> 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: <table border="1" style="margin-left: 20px;"> <tr><td>1</td><td>Line Desc.</td></tr> <tr><td>2</td><td>HUID</td></tr> <tr><td>3</td><td>HUID Name</td></tr> <tr><td>4</td><td>PYRL - Payroll-Department ID</td></tr> <tr><td>5</td><td>PYRL - Payroll-Earnings Type Code</td></tr> <tr><td>6</td><td>PYRL - Payroll-Employee Record</td></tr> <tr><td>7</td><td>PYRL-Payroll-Job Code</td></tr> <tr><td>8</td><td>PYRL - Payroll-Paycheck Date</td></tr> <tr><td>9</td><td>PYRL - Payroll-Paycheck Number</td></tr> <tr><td>10</td><td>PYRL - Payroll-Pay End Date</td></tr> <tr><td>11</td><td>PYRL - Payroll-Pay Group</td></tr> </table>	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	BACKLOG	Could Have	
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		<table border="1"> <tr> <td>12</td> <td>PYRL - Payroll-Position Number</td> </tr> <tr> <td>13</td> <td>PYRL - Period of Work Performed</td> </tr> </table> <ul style="list-style-type: none"> 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', '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 <p>See attached screenshots for illustrations/examples.</p> <p>Team Note: This work had begun but was put aside to implement Harvard Global. Possible for a AUG-27 release.</p>	12	PYRL - Payroll-Position Number	13	PYRL - Period of Work Performed									
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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-8057	Self Service: Additional "Position" Related Columns	Add following "Position" related columns to SS Basic Finance data model. <table border="1"> <tr> <td>Pos Business Title</td> <td>Position Number</td> <td>Empl Class</td> <td>Incum or Vacant Ind</td> <td>FIN Fund Category Desc</td> <td>Dist FTE</td> <td>Dist %</td> <td>Name-Last First Middle</td> <td>Org</td> <td>Position Status</td> </tr> </table> <p>These columns will be secured like the "Transaction Actuals Inclusive" folder.</p> <p>Team Note: This will require DI, RPD and Security Design.</p>	Pos Business Title	Position Number	Empl Class	Incum or Vacant Ind	FIN Fund Category Desc	Dist FTE	Dist %	Name-Last First Middle	Org	Position Status	BACKLOG	Must Have	
Pos Business Title	Position Number	Empl Class	Incum or Vacant Ind	FIN Fund Category Desc	Dist FTE	Dist %	Name-Last First Middle	Org	Position Status						
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	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	BACKLOG	Could Have											

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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 Hierarchy Values (Platform)	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" 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.	BACKLOG	Could Have	
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	
FMS-12901	ADMIRE Project FMS FY26	FMS Financials HART team to support ADMIRE project: connectivity testing, UAT testing, regression, and functional testing.	IN TESTING	Must Have	