The purpose of this document is to provide some tips on using the Harvard Analytics Reporting Tool (HART) dashboards during fiscal year end.

System Availability

Nightly loads run from 8pm – 7am.

- Don’t run dashboards at this time!
- If dashboards are run, the data returned may be incomplete

Performance Tips for Faster Results

- Encourage use of the Transaction Listing All-Lite when possible.
- With all Transaction Listing dashboards, use the Period prompt either by itself or with any other date prompts.
- You may want to run the Transaction Listing against Tub first, over a small time period, to create system cache. Then you can add additional prompts/apply a customization to coax faster results.

Dates in HART Results

Effective Date is the transaction date and defaults into the results, but other dates are available on the Transaction Listing dashboards via right-click may be helpful.

- Posted Date: Date when entry successful posted to the GL
- Creation Date: Date when the entry was created in Oracle GL

Period to Period Prompt

Use the Period to Period prompt carefully! Two fiscal years will be open which will affect the results when used. After 7/1:

- Current fiscal year = FY19; Prior fiscal year = FY18
- Current Fiscal Year to Last Closed Period = no results for FY19 until after the 5th and final close.
- Current Fiscal Year to Current Open Period = transactions posted to the month of July

Closing Selection Prompt

This prompt works differently than in OBI than it did with the legacy reporting system.

- Use this in conjunction with the Period prompt for faster results.
- When one of the options is selected, results include anything posted during that time - both June and July data.
- Want just 1 month? Select the Closing Selection and the correct Period prompt.

Need Additional Help?

- Find out more about using OBI at our wiki site.
- Please send questions or concerns to huit-dms-obi-help@harvard.edu.
• Please send any dashboard enhancement requests to huit-dms-obi-request@harvard.edu.