

Making Changes to CoA Value Sets (Including Local Attributes)

What is a value set?

Value sets are lists of the codes used to validate attributes on CoA segment values.

Who can change a value set?

Tub Authorized Requestors (ARs) can submit requests to add, modify, or disable existing CoA local attribute values only. General Accounting personnel can request changes to all other value sets as noted in the following table:

Segment	Attribute #	Attribute Description	Value Set Owner
Tub	3	Local Attribute 1	Tub
Tub	5	Local Attribute 2	Tub
Tub	7	University Reporting Classification	OFS-Vicki Johnson or Jackie Welham
Object	4	Central-Only Feed Classification	OFS-Karen O'Rourke
Org	3	Local Attribute 1	Tub
Fund	3	Local Attribute 1	Tub
Fund	5	Fund Category	OFS-Vicki Johnson
Fund	6	Fund Type	OFS-Vicki Johnson
Fund	7	Endowment Type	RSO-Thomas Eastman - based on approval by Vicki Johnson
Fund	9	FAS 117 Restriction Status	OFS-Vicki Johnson
Fund	10	FASB Code	OFS-Thomas Eastman
Fund	20	Balance Forward Type	OFS-Vicki Johnson or Tom Spataro
Fund	23	Fund Purpose	RSO-Thomas Eastman
Fund	24	Local Attribute 2	Tub
Activity	3	Local Attribute 1	Tub
Activity	4	Activity Type	OFS-Vicki Johnson
Activity	5	A21 Classification	OSP
Activity	6	Interest Rate Type Code	OFAA-Devin Advani
Activity	9	Debt Terms	OTM-HRVD^CSMA^OTM^BSAct^Appr
Subactivity	3	Local Attribute 1	Tub
Root	3	Local Attribute 1	Tub
Root	4	Root Type	OFS-Vicki Johnson

Maintaining Value Sets

Adding or modifying value set codes

1. Tubs needing to add a new value to (or modify a value in) an existing local attribute value set should send an e-mail to chart@camail.harvard.edu with a completed **CoA Attribute Maintenance Request Form for Authorized Requestors**, available on the ABLÉ Forms page.
 2. Central units needing to add a new value to (or modify a value in) an existing, central-owned value set should send an e-mail to chart@camail.harvard.edu with a completed **Value_Set_Template_Central.xls** template, which they may obtain by contacting Applications Administration.
 3. Apps Admin will save the template locally and validate the request. (All validation requirements are listed on the “Instructions” tab of the template.)
 4. If any single code on the template fails validation, the entire template will be returned to the requestor along with an explanation of the error. The tub will then need to resubmit a corrected file to reinitiate the request.
 5. Once the template passes all validations, Apps Admin will add the new values to the value set and will “Reply All” to the original request e-mail (or the most recent if the original request was rejected) to let the requestor(s) know their request is complete.
 6. The new codes will be available for use in CSMA request screens and batch processing immediately after they have been loaded to Oracle.
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Disabling value set codes

1. Before submitting a request to disable codes in an existing value set, the tub should verify that the code is not populated in the attribute on any active segment value. If it is, the tub should submit modify requests to remove the code from the values prior to submitting the request to disable it.
 2. Tubs needing to disable a value in an existing local attribute value set should send an e-mail to chart@camail.harvard.edu with a completed **CoA Attribute Maintenance Request Form for Authorized Requestors**, available on the ABLÉ Forms page.
 3. Central units needing to disable a value in an existing, central-owned value set should send an e-mail to chart@camail.harvard.edu with a completed **Value_set_Template_Central.xls** template, which they may obtain by contacting Applications Administration.
 4. Apps Admin will save the template locally and validate the request. (All validation requirements are listed on the “Instructions” tab of the template.)
 5. If any single code on the template fails validation, the entire template will be returned to the requestor along with an explanation of the error. The tub will then need to resubmit a corrected file to reinitiate the request.
 6. Once the template passes all validations, Apps Admin will disable the values in Oracle and will “Reply All” to the original request e-mail (or the most recent if the original request was rejected) to let the requestor(s) know their request is complete.
 7. The codes will be eliminated from the picklists in CSMA request screens and will be disallowed by batch processing immediately after they have been disabled in Oracle.
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Adding New Value Sets

Add a new local attribute value set

Tubs wishing to add a new local attribute value set should send an e-mail to chart@camail.harvard.edu with a completed **CoA Attribute Maintenance Request Form for Authorized Requestors** attached, along with a brief statement of the business purpose the new local attribute will serve. The CoA Attribute Maintenance Request Form for Authorized Requestors is available on the ABL Forms page. The business purpose statement should include the following elements:

- a. How and why will the new value set be used?
 - b. What values are proposed and how will they be used?
 - c. If for reporting, do you intend to use the local attribute for Oracle Standard Reports?
 - d. How often do you foresee needing to update the value set?
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Add a new centrally owned value set

Central units wishing to add a new centrally owned value set (the request for which implies a new CoA segment attribute) should send an e-mail to chart@camail.harvard.edu with a completed **Value_Set_Template_Central.xls** template, along with a brief statement of the business purpose the new attribute will serve. Contact Applications Administration for a copy of the template. The business purpose statement should include the following elements:

- a. What values are proposed and how will they be used?
- b. What ranges of segment values will use the attribute codes?
- c. Will there be special restrictions for the codes' use? For example, are there ranges where the attribute should be left blank, derived with a constant value, or limited to a scaled list of the values?
- d. If for reporting, do you intend to use the attribute for Oracle Standard Reports?
- e. How often do you foresee needing to update the value set?

Because centrally owned attributes imply use and distribution across multiple tub segment ranges, the process of adding a new attribute to a chart segment will involve significant effort and will take up to 3-4 months or more to implement. Such an effort would include:

- a. Adding the new attribute to Oracle and populating the new value set;
 - b. Adding the new attribute to CSMA's screens and batch templates;
 - c. Adding any validation requirements to CSMA's validation tables;
 - d. Documenting the purpose and use of the new attribute and communicating it broadly to all Oracle users;
 - e. Updating all CSMA range validations for the segment;
 - f. Updating HDW ad hoc views and extracts to include the new attribute and value set; and
 - g. Evaluating what existing HDW reports (if any) need to be updated to include the attribute and add it to those reports.
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Adding New Value Sets, continued

Apps Admin steps to process requests for new value sets

1. Once Apps Admin receives the request, they will save the template locally and validate it.
2. If any issues are identified, the entire template will be returned to the requestor along with either a request for additional information or an explanation of the problem and a proposed solution. The tub will then need to resubmit a corrected file and/or additional documentation to reinitiate the request.
3. Once the template passes all validations, Apps Admin will make the necessary changes to Oracle and will “Reply All” to the original request e-mail (or the most recent if the original request was rejected) to let the requestor(s) know their request is complete.

When adding a tub-owned local attribute values set, the new codes will be available for use in CSMA request screens and batch processing immediately after they have been loaded to Oracle. Because they will require enhancements to the Oracle applications, new central attributes will likely be released during one of the University’s regularly scheduled Oracle system upgrades.

Disabling Value Sets

The process to disable value sets

1. Before submitting a request to disable a value set, the requestor should verify that none of the codes are populated in the attribute on any active segment value. If they are, the requestor should submit modify requests to remove the codes from the values prior to submitting the request to disable it.
2. Tubs wishing to disable a local attribute value set should send an e-mail to chart@camail.harvard.edu with a completed **CoA Attribute Maintenance Request Form for Authorized Requestors** attached, along with a brief statement as to why the attribute will no longer be used. The form is available on the ABL Forms page.
3. Central units wishing to disable a centrally owned value set (the request for which implies the removal of a CoA segment attribute) should send an e-mail to chart@camail.harvard.edu with a completed **Value_Set_Template_Central.xls** template, along with a brief statement of why the attribute is no longer required. The statement should include the following elements:
 - a. The original use intended for the attribute and why it no longer applies;
 - b. Planned steps to inform all Oracle users that the attribute will no longer be used; and
 - c. Planned steps to remove all attribute coding from the segment values.

Because centrally owned attributes imply use and distribution across multiple tub segment ranges, the process of removing an attribute from a chart segment will involve significant effort that will take up to 3-4 months or more to implement. Such an effort would include:

- a. Removing the attribute from CSMA's screens and batch templates;
- b. Removing any validation requirements from CSMA's validation tables;
- c. Documenting the plan to remove the attribute and communicating it broadly to all Oracle users;
- d. Updating all CSMA range validations for the segment;
- e. Updating HDW ad hoc views and extracts to exclude the attribute and value set;
- f. Evaluating what existing HDW reports (if any) need to be updated to exclude the attribute and remove it from those reports; and
- g. Removing the attribute from Oracle and deleting the value set.

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Disabling Value Sets, continued

**The process to
disable value
sets (continued)**

4. Once Apps Admin receives the request, they will save the template locally and validate it.
5. If any issues are identified, the entire template will be returned to the requestor along with either a request for additional information or an explanation of the problem and a proposed solution. The tub will then need to resubmit a corrected file and/or additional documentation to reinitiate the request.
6. Once the template passes all validations, Apps Admin will make the necessary changes to Oracle and will “Reply All” to the original request e-mail (or the most recent if the original request was rejected) to let the requestor(s) know their request is complete.

Once a local attribute value set has been eliminated, the CSMA field will be disabled for that segment. Elimination of centrally owned value sets will require the removal of fields from the CSMA screens and/or batch templates. Because they will require enhancements to the Oracle applications, these changes will likely be released during one of the University’s regularly scheduled Oracle system upgrades.
