

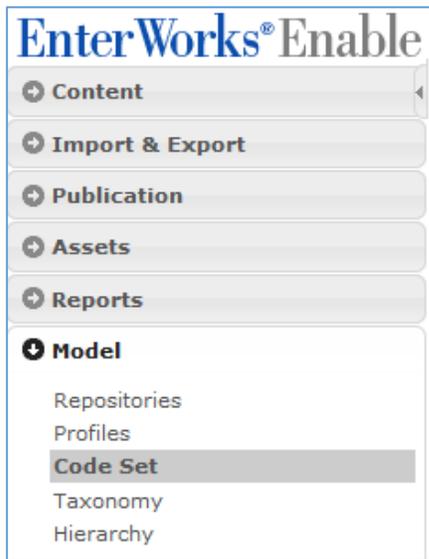
Maintaining Code Sets

See your System Administrator if a new code set needs to be defined or if you need to be given the authority to maintain code sets. There are two ways to maintain code set data, one is from the Model feature and one is from the field attached to a code set. If you need to delete values or add/change multiple code set values, the first option below is recommended. The two options for maintaining a code set are described below.

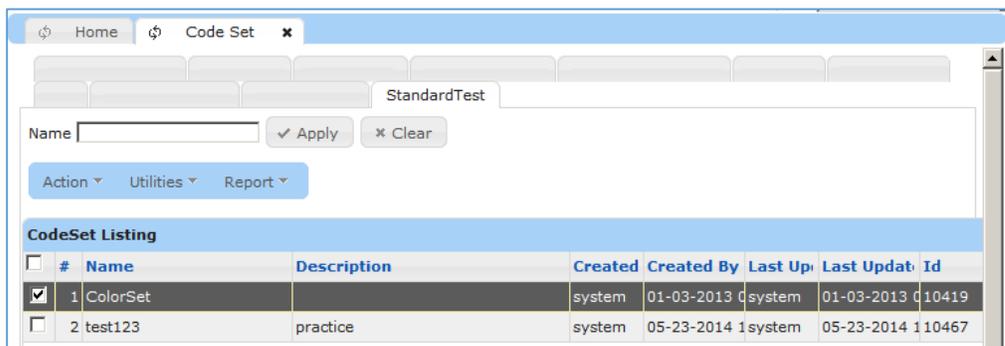
Maintaining Code Sets from the Model Feature option

Perform the following steps to maintain a Code Set's data from the Model Feature:

1. Click on the Model feature in the left feature bar.
2. Click on the Code Set function under the Model feature to show all the defined code sets.



3. Highlight the code set to be updated.



The screenshot shows the 'CodeSet Listing' table in the application interface. The table has columns for selection, ID, Name, Description, Created, Created By, Last Up, Last Updat, and Id. Two rows are visible: '1 ColorSet' and '2 test123'. The first row is selected with a checkmark.

<input type="checkbox"/>	#	Name	Description	Created	Created By	Last Up	Last Updat	Id
<input checked="" type="checkbox"/>	1	ColorSet		system	01-03-2013	system	01-03-2013	110419
<input type="checkbox"/>	2	test123	practice	system	05-23-2014	system	05-23-2014	110467

4. Select **Edit** from the **Action** drop-down list or double-click to open the editor.

Description	Created	Created By	Last Update	Last Updated	Id
	system	01-03-2013	system	01-03-2013	110419
practice	system	05-23-2014	system	05-23-2014	110467

5. Click the **Next** button.

Name: ColorSet
Group: StandardTest - Code Set
Description:
Description in Other Languages:
Include Owner: Yes No
Source: Detail Editor Import from a file

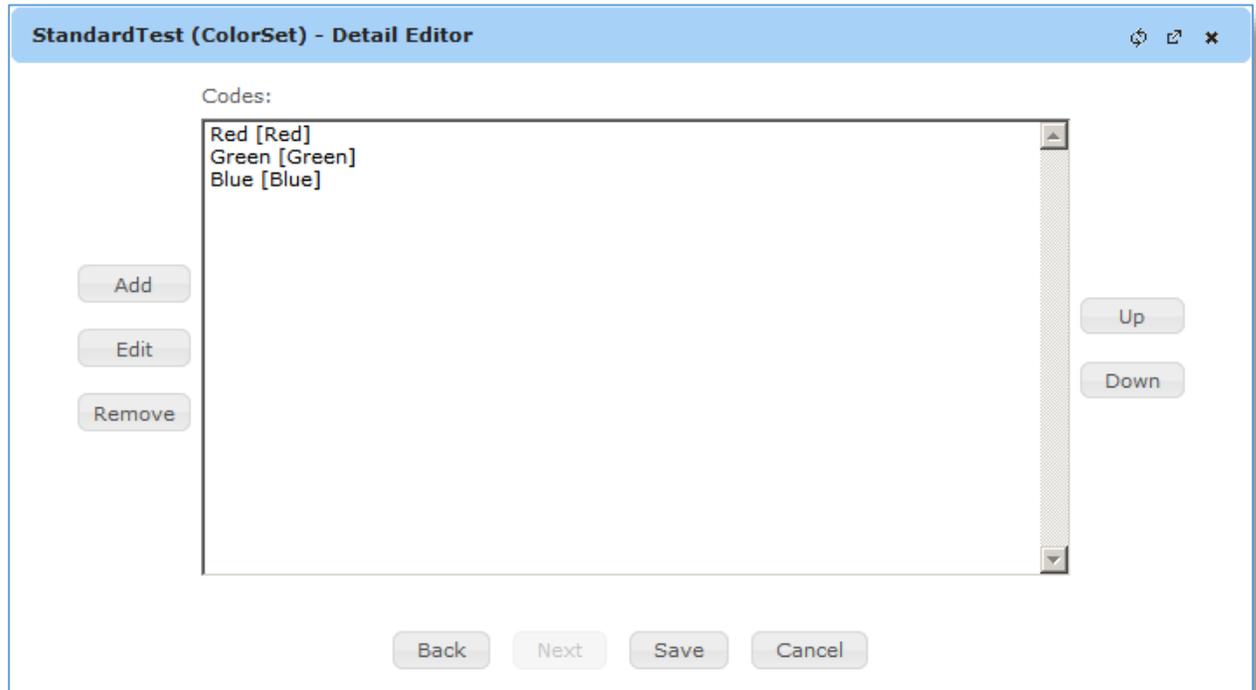
Properties | Property Rules

Action ▾

Name	Data Type	Default Value	Code Set	Display Order
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Back Next Save Cancel

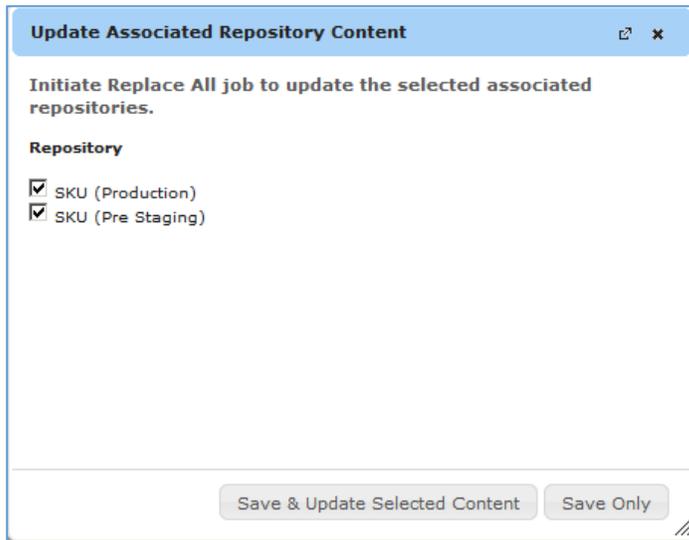
6. To modify a code, select the code and click the **Edit** button.
7. To remove a code, select the code and click the **Delete** button.
8. To add a code, click the **Add** button.
9. To re-sequence a code, select the code and click the **Up** or **Down** button to move it in the list.



10. Click the **Save** button to save changes or **Cancel** button to cancel changes.

Note: If only the code description is changed, a "Work in progress, please wait" message appears on the top of the window above and the change is made to the description code set. Since the description is not saved on each record that uses the code set, no changes are made to the records that use that code set.

11. If the code of the code set is changed, and the code set is linked to any repositories, the following window is shown.



12. If you want all records that use this code to be changed, click the **Save and Update Selected Content** button and a job is submitted. The job can be accessed via the **Job Monitor**.
13. If you only want the code to change and all the records to keep the old code, click the **Save Only** button.
- Important Note:** If the **Save Only** button is clicked, the repository records still using the old code will be invalid because the field no longer contains a valid code.

Editing & Adding Codes from a Code Set attached field

Perform the following steps to maintain a Code Set's data from a field attached to a code set.

Note: A code cannot be deleted using this method, only added or changed.

1. Open the repository that contains the record with the field attached to the code set. For example, the Office's Item repository below shows an Order Unit field that is attached to the "Unit Code" code set.

The screenshot shows a software interface for editing a record. The window title is "Edit 1 record(s)". On the left, there is a list of items: BICBHP11BK, 50324, PEN,HIGHLIGHTER, and COMBO,BK. Below this is an "Error Levels" section. The main area is a form with several tabs: Summary, Marketing System, Category Specific States, Relationships, Cross Reference, Digital Assets, Standards, and Facility. The "Summary" tab is active. The form contains various fields: "Product Number", "Test_Sub" (Fixed Value), "testattr", "newattr1", "UOM" (Unit of Measure) section with "UOM from Inventory Unit Code", "Selling Unit" (EA -- [EACH]), "Retail Unit" (EA -- [EACH]), "Purchasing Unit" (EA -- [EACH]), "Order Unit" (EA -- [EACH]), "UPC Retail" (070330168817), "UPC Carton" (20070330168811), "Item Height" (7.800), and "Item Depth" (0.800). At the bottom right, there are "Save" and "Cancel" buttons.

2. Click the pencil  icon to the right of the field to change the code displayed in the field.

This is a close-up view of the "Order Unit" field from the previous screenshot. The field contains the text "EA -- [EACH]". To the right of the field is a pencil icon and a plus sign. Below the field, there are two "Edit Code" buttons, one of which is highlighted with a mouse cursor.

3. Make the changes to the code and click the **Save** button. The changes will apply to all records using this code.

Unit Code EA [1227937]

Code Detail Id 1227937

Code EA

Description EACH

Active Date 12/07/1984

Unit Value Quantity 1.00

Active Indicator Active

Sequence 13

Save Cancel

4. If the code itself is changed, the system will find all the repositories that uses the code set and shows the following window. If the **Save & Update Selected Content** button is clicked, a job will be created for each repository to update the code on all the records that use it. If the **Save Only** button is clicked, only new selections will get the new code and all the other records will be identified as invalid because there is no longer a code set record that matches the value.

Update Associated Repository Content

Initiate Replace All job to update the selected associated repositories.

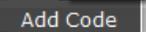
Repository

- Facility
- Item Prod (Production)
- Item
- Item (Pre Staging)
- Items (Pre Staging)
- List

Save & Update Selected Content Save Only

5. To add a new code, click on the **plus** sign  icon to the right of the field.

Order Unit	
EA -- [EACH]	  
UPC Retail	
070330168817	
UPC Carton	
20070330168811	

6. Add the new code and click the **Save** button.

Unit Code (New) [-1421186331518]   

Code Detail Id -1421186331518

 Code

 Description

Active Date

Unit Value Quantity

 Active Indicator **Active** 

Sequence