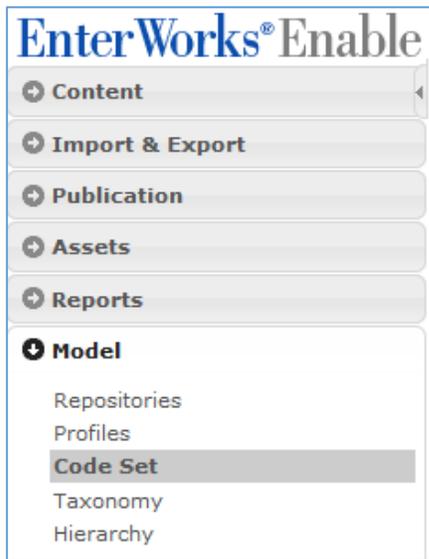# Maintaining Code Sets

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.
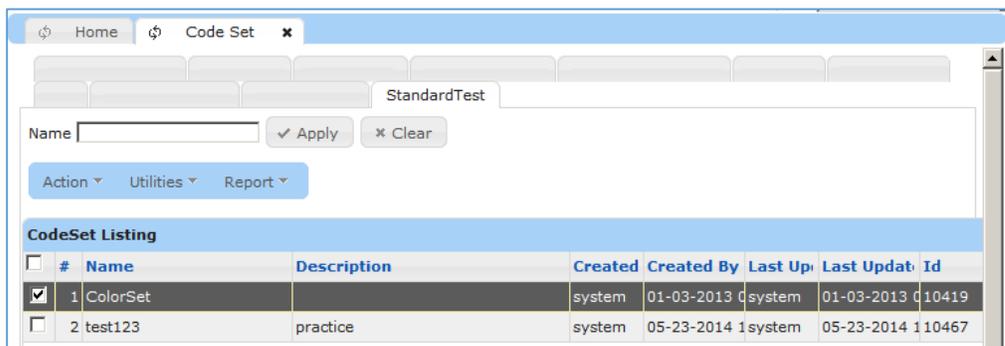
Maintaining Code Sets from the Model Feature option

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.

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

5. Click the **Next** button.

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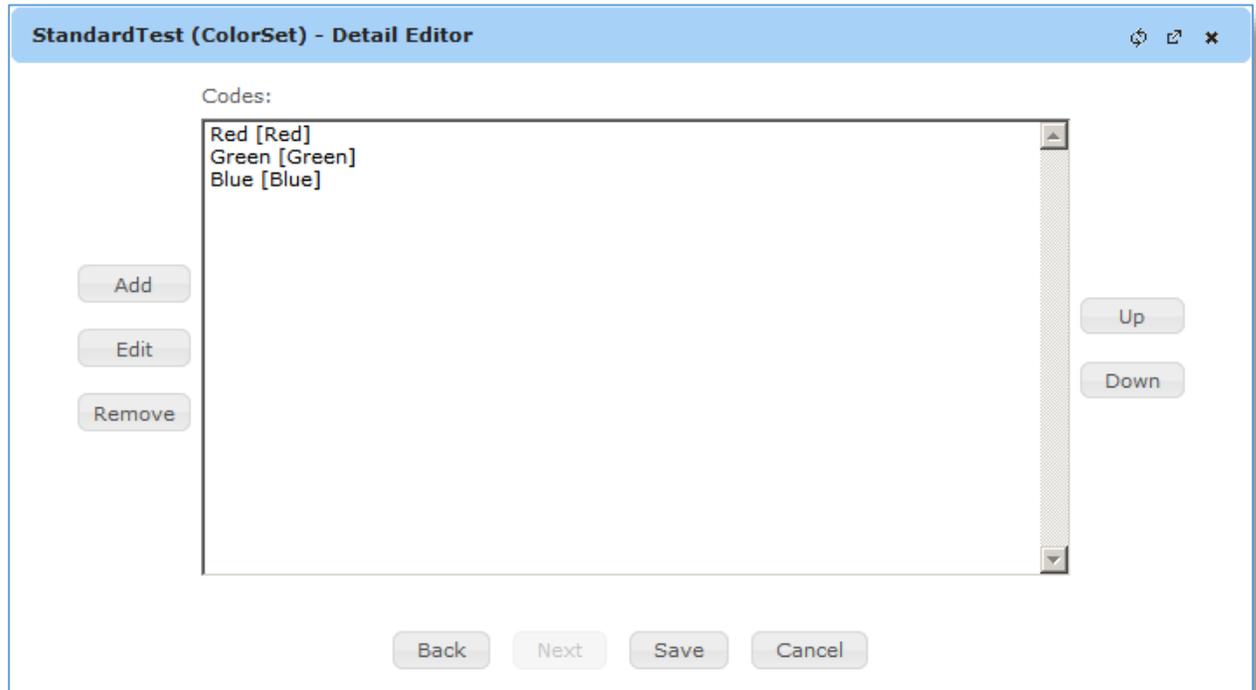
10. Click the **Save** button to save changes or **Cancel** button to cancel changes.

   **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.
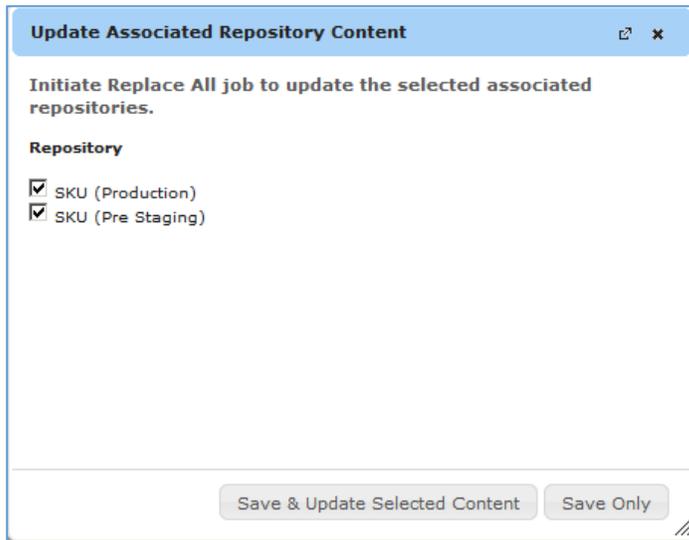
12. If you want all records that use this code to be changed, click the **Save and Update Selected Content** button and a job is submitted. The job can be accessed via the **Job Monitor**.

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.

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

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

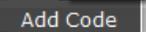Initiate Replace All job to update the selected associated repositories.

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

Add Code

Add Code

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 [   ]

Save   Cancel