How to Manage Value Lists

When completing dropdown and checkbox fields on Views, the user is asked to select from a list of items. This list of items is called a **Value List**. Administrators can create new value lists and edit the existing value lists that are used within their account. Users can also merge duplicate values and archive unwanted values. This guide will cover all of these processes.

How To Create a Value List

- Hover over **My Account** and select **Administration**

- Select **Value Lists** from the Configuration section on the left-hand side

- Choose the relevant section from the sub-menu on the left-hand side. 'Individuals' covers the value lists used in the 'Participants', 'Staff', 'Volunteers' and 'Professionals' areas of the Contacts section

- Click on the plus   <kbd>+</kbd>   icon

- Enter a **Name** for the Value List

- The **Extendable** field determines whether non-administrators are able to add new values to this list. The **Alphabetical** field determines whether the list should be automatically sorted A - Z

- Click **Save**

- To add a value to the list, click on the plus icon, **+** enter a value and click **Submit.** Repeat for all values that need to appear in the list

How to Edit a Value in the List

- Hover over **My Account** and select **Administration**

- Select **Value Lists** from the Configuration section on the left-hand side

- Choose the relevant section from the sub-menu on the left-hand side

- To the right of the list that you wish to edit, click on the pencil icon ✎

- To the right of the value that you wish to edit, click on the pencil icon ✎

- Make the required changes and click **Submit**. Please note, if the value has previously been used, all previous uses of this value will also be changed

How to Merge Values in the List

Administrators may sometimes find that an item in a list has been duplicated. In these cases, it's possible to merge two or more duplicate values, replacing all uses of the duplicates with a single 'destination' value. To do this:

- Hover over **My Account** and select **Administration**

- Select **Value Lists** from the Configuration section on the left-hand side

- Choose the relevant section from the sub-menu on the left-hand side

- To the right of the list that you wish to merge values for, click on the pencil icon ✎

- Click on the Merge icon ⛓

- Select a **Destination Value**

- In the **Values to merge** field, select the values that you wish to merge into the **Destination Value**

- In the **Preserve merged values** field, select whether the merged values should remain as options in the value list, or should be deleted after being merged

- Click **Save**

- Review the previous usage of the values to be merged. Click **Confirm** and then **OK** to proceed with the merger, or click **Cancel** to abandon the process

After completing the merger, all previous uses of the merged values will be replaced with the destination value.

How to Archive Items in the List

Over time, value lists may contain values that are no longer needed. Values can't be deleted if they have previously been used, but Administrators have the option to archive these. An archived value will display when viewing historic data and running reports but will no longer appear when creating new records. To archive a value:

- Hover over **My Account** and select **Administration**

- Select **Value Lists** from the Configuration section on the left-hand side

- Choose the relevant section from the sub-menu on the left-hand side

- To the right of the list that you wish to merge values for, click on the pencil icon

- Click on the Archive icon

- Select the items that you wish to archive and click **Submit**

The selected values will now be archived. To restore an archived value:

- Click on the Archive icon

- De-select the items that you wish to restore and click **Submit**

The de-selected values will now be restored to the list.