

Organisation Reference Codes

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Overview

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Numeric and Text based data displayed in a report can be translated from values held in the database to more meaningful values by adding a reference code to a dimension. This should be used if:

1. You wish to **translate a value** held in the data source into business terminology. For example if male and female are stored as M and F you may want to translate these into 'Male' and 'Female'
2. If you wish to **apply customised sorting** to a field. For example: data returned in a query is usually displayed in Alpha / Numeric sort order. If your result set included: Admin Staff, Managers and Executive Management your report may look like this:

Admin Staff	500
Executive Management	10
Management	50

Hierarchically your data may actually need to be displayed in the following way:

Executive Management	10
Management	50
Admin Staff	500

This can be achieved by creating reference codes for the values and assigning a sort order to those codes.

Create Reference Code

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1. In the format tab the user must select Org Ref Code from the dropdown option; the other option is to choose to display the text which is stored in the database. Selecting to display the org reference code the user is able to create a new type or use an existing type.

The screenshot shows the 'Format' tab of a configuration window. It includes a 'Save' button in the top right. The configuration details are as follows:

Field Type:	Dimension
Converted Data Type:	Text
Format:	Org Ref Code
Reference Type:	<input checked="" type="radio"/> Use Existing Type <input type="radio"/> Create New Type
Reference Codes:	Country

Below the 'Reference Codes' field, a list of codes is displayed:

- AF: Afghanistan
- AL: Albania
- DZ: Algeria
- AS: American Samoa
- AD: Andorra
- AO: Angola
- AI: Anquilla

2. To use an existing reference code the user can simply select the code from a dropdown box once they have ticked the existing type option.

3. To create a new reference code the user must tick create a new type option and then select to pre-populate from the database or not. A pop up window will appear so the user can add their new reference code. In this window the user can also edit an existing reference code or delete an existing reference code.

The screenshot shows a software window with tabs: Definition, Data Conversion, **Format**, Access, Hierarchy, and Usage. The 'Format' tab is active. It contains the following fields and options:

- Field Type: Dimension
- Converted Data Type: Text
- Format: Org Ref Code (dropdown menu)
- Reference Type: ☐ Use Existing Type ☒ Create New Type
- Pre-populate from Database: ☒ Yes ☐ No [➤](#)

A blue 'Save' button is located in the top right corner of the window.

4. If you pre-populate from the database you will see values already in the code list. You will have to give the reference code you are defining a name. This is so that the set of translations can be re-used across multiple views.

The screenshot shows a web browser window titled 'Reference Codes - Google Chrome'. The address bar shows the URL: `localhost:6363/MICreateRefCode.i4.jsessionid=2383401BEB40BC44`. The main content area is titled 'Reference Type Details' and includes a 'Name:' label and an empty text input field.

Below this is a section titled 'Reference Type' containing a table with the following data:

	Code:	Name:	Sort Order:
<input type="checkbox"/>	AD	AD	0
<input type="checkbox"/>	AR	AR	0
<input type="checkbox"/>	AT	AT	0
<input type="checkbox"/>	AU	AU	0
<input type="checkbox"/>	BA	BA	0
<input type="checkbox"/>	BE	BE	0
<input type="checkbox"/>	BG	BG	0
<input type="checkbox"/>	BR	BR	0
<input type="checkbox"/>	CA	CA	0
<input type="checkbox"/>	CH	CH	0
<input type="checkbox"/>	CL	CL	0

At the bottom of the window are two buttons: 'Save' (blue) and 'Cancel' (grey).

Editing a reference code

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When editing a reference code you can change the values and the sort order of the codes stored in your database. Click on the code hyperlink to open the edit section in the lower section of the popup to change the name and sort order.

Reference Codes - Google Chrome

localhost:6363/OrgRefCodesEdit.i4;sessionId=2383401BEB40BC44

Reference Codes

Save

Cancel

Reference Type Details

Name:

Country

Reference Codes

<input type="checkbox"/>	AF	Afghanistan	0
<input type="checkbox"/>	AL	Albania	0
<input type="checkbox"/>	DZ	Algeria	0
<input type="checkbox"/>	AS	American Samoa	0
<input type="checkbox"/>	AD	Andorra	0
<input type="checkbox"/>	AO	Angola	0
<input type="checkbox"/>	AI	Anguilla	0
<input type="checkbox"/>	AQ	Antarctica	0
<input type="checkbox"/>	AG	Antigua and Barbuda	0
<input type="checkbox"/>	AR	Argentina	0
<input type="checkbox"/>	AM	Armenia	0
<input type="checkbox"/>	AW	Aruba	0

Add

Edit

Delete

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