

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.

Definition Data Conversion **Format** Access Usage

Save Activate

Field Type: Metric
Converted Data Type: Numeric
Format: Org Ref Code
Reference Type: ☒ Use Existing Type ☐ Create New Type
Reference Codes: Months
1: January
2: February
3: March
4: April
5: May
6: June

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.

Definition

Data Conversion

Format

Access

Usage

Save

Activate

Field Type:

Metric

Converted Data Type:

Numeric

Format:

Org Ref Code

Reference Type:

Use Existing Type

Create New Type

Pre-populate from Database:

Yes

No

Additive Type:

Additive

Semi-Additive

Default Aggregation:

-- N/A --

Colour

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.

Reference Type Details

Name:

Reference Type

	Code:	Name:	Sort Order:
<input type="checkbox"/>	1	1	0
<input type="checkbox"/>	10	10	0
<input type="checkbox"/>	11	11	0
<input type="checkbox"/>	12	12	0
<input type="checkbox"/>	2	2	0
<input type="checkbox"/>	3	3	0
<input type="checkbox"/>	4	4	0
<input type="checkbox"/>	5	5	0
<input type="checkbox"/>	6	6	0
<input type="checkbox"/>	7	7	0
<input type="checkbox"/>	8	8	0
<input type="checkbox"/>	9	9	0

Edit

Delete

Save

Cancel

Editing a reference code

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

Save

Cancel

Reference Type Details

Name:

Months

Reference Codes

<input type="checkbox"/>	1	January	1
<input type="checkbox"/>	2	February	2
<input type="checkbox"/>	3	March	3
<input type="checkbox"/>	4	April	4
<input type="checkbox"/>	5	May	5
<input type="checkbox"/>	6	June	6
<input type="checkbox"/>	7	July	7
<input type="checkbox"/>	8	August	8
<input type="checkbox"/>	9	September	9
<input type="checkbox"/>	10	October	10
<input type="checkbox"/>	11	November	11
<input type="checkbox"/>	12	December	12

Add

Edit

Delete