

Reference Codes

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Overview

Reference codes allow for more meaningful values in reports with numeric- and text-based data by mapping a code to each field value. For example, a text field that contains 'Y' or 'N' could be mapped to display 'Yes' or 'No'.

The Reference Codes page lets administrators edit existing reference codes created through the [Model](#).

Reference code use examples

Reference code mapping can be used for all sorts of things. Some examples, are to:

- provide more descriptive text (like our 'Y' and 'N' example above);
- provide translated alternatives (only available for multi-language deployments), where values can be mapped to translated equivalents (like 'Oui' and 'Non' for the French versions of 'Yes' and 'No' in our example above);
- use customized sorting in your tables and charts (for example, if you wish to provide more weight to some results, as shown in the example below);
- add custom colors to each value; and,
- add custom images to each value.

Let's take the example of customized sorting. Data is typically returned from a query with an alpha-numeric sort order. If your result set were to include 'Admin Staff', 'Managers' and 'Executive Management', your report may look like this:


Admin Staff	500
Executive Management	10
Management	50

If you have a preferred sort order in mind, such as the order shown below, you can map each value to a sort order number to match your requirements. In the example below, that could be a number 1 for 'Executive Management', a number 2 for 'Management' and a number 3 for Admin Staff'.

Executive Management	10
Management	50
Admin Staff	500

Accessing reference codes

Reference codes are stored within the Admin Console of Yellowfin. To access the page, follow the steps below.

1. Click on the burger bun  in the top left corner of Yellowfin
2. From the menu that appears, click on **Administration**, then **Admin Console**

3. From the page that appears, click on the section called **Reference Codes**
A list of existing reference code lists will be displayed along with an **Add** button

The screenshot shows the Yellowfin Admin Console interface. The top navigation bar includes the Yellowfin logo, a user profile icon, and a 'Logout' button. The main content area is divided into several sections:

- Administration**: A sidebar on the left with links to 'Users', 'Data Sources', 'Roles', 'User Groups', 'Content Folders', 'Field Folders', and 'Reference Codes'.
- Users**: A section showing 'Yellowfin Users' with a 'Versus License' bar chart and a '25 / 25' status.
- Unique Logins**: A section showing 'Last 30 Days' with a bar chart and a value of '89'.
- Dashboards**: A section showing 'Accessed last 30 days' with a bar chart and a value of '7 / 30'.
- Reports**: A section showing 'Read last 30 days' with a bar chart and a value of '22 / 134'.
- Configuration**: A section on the right with links to 'Configuration', 'Content Settings', 'Images and Maps', and 'Email Template'.
- Administration**: A section on the right with links to 'Session Management', 'Schedule Management', 'Dashboard Management', 'License Management', 'Background Execution', 'Plugin Management', 'System Information', 'Content Translation', 'Mobile Access Management', 'Client Organizations', 'Export', and 'Import'.

The 'Reference Codes' section is highlighted in the sidebar and shows a list of reference codes with columns for 'Name', 'Bone Groups', 'Booking Method', 'Country', and 'Demographic'.

Using the Create Reference Code dialog box

The Create Reference Code dialog box contains four tabs — Details, Values, Translation (if enabled for your deployment) and Refresh — which each provide their own functionality. Each tab is described below.

Details tab

The Details tab shows which options are switched on and off for this reference code list. Changing the options here will affect what's available on the other tabs.

Reference Code

Details

Values

Translation

Refresh

Usage

Name

Demographic

Provide a name for this Reference Code.

Custom Sort:

Custom sorting is enabled for this Reference Code. You can assign the sort order for each value on the Values tab.

Custom Colors:

Custom colors are enabled for this Reference Code. You can assign colors for each value on the Values tab, which can then be used for charts and filters.

Custom Images:

Custom images are enabled for this Reference Code. You can assign images for each value on the Values tab, which can then be used for filters.

Trim Values

Values for this Reference Code will not have leading and trailing whitespace trimmed when matching to report values.

Delete

Save

Field Name	Description
Name	This field stores your preferred name for this reference code list.
Custom Sort	<div>When enabled, this toggle lets you change the default field value sort order to your own custom order. For example, you could sort months chronologically by setting January to '1', February to '2' and so on.</div> <div>This toggle is disabled by default.</div>
Custom Colors	<div>When enabled, this toggle lets you assign a color to each field list value. These can be used in charts and filter to ensure that values are easily identified and consistent across reports.</div> <div>This toggle is disabled by default.</div>
Custom Images	<div>When enabled, this toggle lets you assign an image to each field list value. These can be used within In List filters to help users select value. The image will appear next to the value in the list.</div> <div>This toggle is disabled by default.</div>
Trim Values	<div>When enabled, this toggle removes leading and trailing whitespace from field values.</div> <div>This toggle is enabled by default.</div>

Values tab

The Values tab is where you define any of the options that you enabled on the Details tab. If, for example, you didn't enable the Custom Sort option on the Defaults tab, the Sort column won't be available on the Values tab.

Reference Code

Details

Values

Translation

Refresh

Usage

This Reference Code currently has 6 values defined.

Code	Description	Sort	Color	Image
Adventure	<input type="text" value="Adventure"/>	<input type="text" value="1"/>	<div></div>	<div></div>
Relaxati...	<input type="text" value="Relaxation"/>	<input type="text" value="2"/>	<div></div>	<div></div>
Family	<input type="text" value="Family"/>	<input type="text" value="3"/>	<div></div>	<div></div>
Culture	<input type="text" value="Culture"/>	<input type="text" value="4"/>	<div></div>	<div></div>
Luxury	<input type="text" value="Luxury"/>	<input type="text" value="5"/>	<div></div>	<div></div>
Sport	<input type="text" value="Sport"/>	<input type="text" value="6"/>	<div></div>	<div></div>

Remove All

Add new values:

+

[Populate from CSV.](#)

Save

Field name	Description
Code	This is the value used in your database that will be replaced with your new text.
Description	This is the text that will be displayed in the report, filter and charts to replace the code.
Sort	Add a number to this field to create your own sort order. If you expect to add more values to your sort order later on, consider a numbering system that provides more flexibility. For example, instead of number your top three options 1, 2 and 3, you could use 10, 20, 30 so that any future values that you would like to add between existing values will be fast to implement.
Color	Click on this field to add a custom color for the value.
Image	Click on the image to display the Image Manager, where you can choose an existing image to associate with this value (or upload a new one if you have access to do so).
Plus sign	When you've entered all the details for this value, click on the plus sign to add it to your list. Make sure you click on this plus sign after entering your final list item.

Populate from CSV	If you already have a list containing some of these details, you can click on this link to upload a CSV file to quickly populate this tab. The CSV file can contain up to three fields — Code, Description and Sort. You will need to add any custom colors and images after uploading the CSV file containing the text fields.
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Translation tab

This tab will only be displayed if you're using a multi-language deployment of Yellowfin. Here, you can choose a language and provide a translation for each value, along with the name of the field.

Reference Code

Details

Values

Translation

Refresh

Usage

This is a multi-language installation. Add descriptions for the Reference Codes for different languages below.

Language:

French (France)

Name:

Démographique

Code	Default	Translation	Sort
Adventure	Adventure	Aventure	
Relaxati...	Relaxation	Relaxation	
Family	Family	Famille	
Culture	Culture	Culture	
Luxury	Luxury	Luxe	
Sport	Sport	Sport	

Save

Field name	Description
Language	Use this dropdown to select an alternative language from the list of available languages for your deployment.
Name	This field provides a place to enter the translation for the Name field from the Details tab. In our example, our field name is 'Demographic', which has been translated here to 'Démographique'.
Code	This field is the same as the Code field from the Values tab, so you can see each value you're translating.
Default	This field is the same as the Description field from the Values tab, so you can see how the code field has been mapped to the default language of your deployment.

Translation	This field provides a place to enter the translation for each value.
Sort	We recommend you leave the Sort field blank because it will default to whatever sort order you set on the Values tab, ensuring your content shows the same order regardless of what language your viewers are using.

Refresh tab

The Refresh tab provides three options for how to update code values that are mapped to your content.

Reference Code

Details

Values

Translation

Refresh

Usage

How should the Reference Code values be updated?

Manually

Scheduled Sync

Scheduled Query

Save


Option	Description
Manually	Use this option if you wish to continue to manually enter each value (or to manually import via the Populate from CSV link on the Values tab)
Scheduled Sync	Use this option if you would like to periodically synchronize values from a specific data source. You can schedule how often Yellowfin should perform this task. Note that this option is limited to updating only one field in your deployment.
Scheduled Query	Use this option if you would like to periodically update values using an SQL query. This is the easiest way to populate fields, but it requires SQL knowledge.

Follow these steps to set up a schedule to sync values from a data source.

1. Choose the Schedule Sync method for updating values.
2. Enable the Replace existing values toggle to replace the values with new ones. If this toggle is disabled then new values will be added, without removing or updating the existing ones.

Replace existing values?

New values will be added to this Reference Code. Existing values will not be modified or removed.




3. Specify the data source, view and field from where to fetch the values.

Select the source, view and field.

Reference Code values will be synchronized with the values in this field.


Data Source:

Ski Team




View:

Ski Team



Field:


Demographic




4. Set up a schedule for how frequently the values should be updated automatically. For example, you can schedule the system update the field weekly.

Schedule:


Weekly




Monday




Australia




Sydney (+10:0...



12 am




:00




5. You can also specify an admin user who should be notified when values are updated.


Admin Notification

Select an administrator user to be notified whenever new values are added to this Reference Code.

 System Administrator
admin@yellowfin.com.au



6. Click Save to perform the update.
7. Note that with this option, you're only limited to one field; in this case the code and description will be the same. You will then need to manually update the description in the [Values](#) tab.

 You could also run this update task through the Schedule Manager.

Here's what to do if you've chosen to add values to the reference code field using an SQL query.

1. Choose the Schedule Query method for updating values.
2. Enable the Replace existing values toggle to replace the values with new one. If this toggle is disabled then new values will be added, without removing or updating the existing ones.

Replace existing values?

New values will be added to this Reference Code. Existing values will not be modified or removed.



3. Select data source from where to import values.
4. Provide the SQL query.

Your query should return 3 columns: **Code**, **Description**, and **Sort Order**.

Data Source:

Ski Team



Query:

[Query Help](#)

```
select demographic_code, demographic_description, sort
from ref_code_testing
```



Note that the columns should be specified in the exact order in your query, e.g. code, language (if you have a multi-language system), description, and sort order. (The names of the column need not be exact.)

5. You can use Query Help for assistance in writing your query.

Query Help

Your query should return 3 columns:

Code
The code, for a matching value in the database, being added or updated.

Description
The description that will be applied to the value being added or updated.

Sort Order
The sort order that will be applied to the value being added or updated.

Here is an example of the result set that your query should return:

Code	Description	Sort Order
ADVENTURE	Adventure	1
CULTURE	Culture	2
FAMILY	Family	3
LUXURY	Luxury	4
RELAXATION	Relaxation	5
SPORT	Sport	6

6. Click the Test Query button at the bottom to validate your query. If the query is valid, a success message will appear with an example of its result. (The button will also change to Save.)

Query: `select demographic_code, language, demographic_description, sort from ref_code_testing`

[Query Help](#)


Query Successful

demographic_code	language	demographic_description	sort
LUX	EN	Luxury	1
SP	EN	Sport	1
ADD	EN	Adventure	1
New	EN	New Thing	1

7. Set up a schedule for how frequently the values should be updated automatically. For example, you can schedule the system to update values weekly.

Schedule:			
Weekly	▼	Monday	▼
Australia	▼	Sydney (+10:0...	▼
12 am	▼	:00	▼

8. You can also specify an admin user who should be notified when values are updated.

Admin Notification Select an administrator user to be notified whenever new values are added to this Reference Code. <hr/>	<div>System Administrator admin@yellowfin.com.au</div> 
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9. Click Save to perform the update. (In case of the query method, this can only be done if your query is valid.)

 You could also run this update task through the Schedule Manager.

Usage tab

This tab shows the current View usage of the code. This is ideal if you want to delete a code, but would first like to check where it is being used.

Reference Code

Details

Values

Translation

Refresh

Usage

View	Category	Field	Report Usage
Ski Team (Clone)	Athlete	Demographic	
Ski Team (Clone)		Demographic	
Ski Team		Demographic	
Ski Team	Agency	Agency Demographic	
Ski Team (Clone)	Agency	Agency Demographic	
Ski Team	Athlete	Demographic	

Save

[Top of page](#)

Create a new reference code list

If you'd like to create your own reference list, use the information above and follow the steps below.

1. Ensure you can still see the **Reference Codes** area of your Admin Console

2. Click the **Add** button under the list of any existing reference codes

Field Orders

Reference Codes

Name

Bone Groups

Booking Method

Country

Demographic

Gender Formatted

Media Category

Month

Add

Content Tags

3. Provide a name and toggle the settings you wish to use on the **Details** table (see the table under [Details tab](#) of this wiki page for more information)

Create Reference Code

Details

Values

Refresh

Create a new Reference Code.

Name

Media type

Provide a name for this Reference Code.

Custom Sort:

Custom sorting is enabled for this Reference Code. You can assign the sort order for each value on the Values tab.

Custom Colours:

Custom colours are enabled for this Reference Code. You can assign colours for each value on the Values tab, which can then be used for charts and filters.

Custom Images:

Custom images are enabled for this Reference Code. You can assign images for each value on the Values tab, which can then be used for filters.

Trim Values

Values for this Reference Code will have leading and trailing whitespace trimmed when matching to report values.











Define Values

4. Click on the **Values** tab to enter the mapped content (see the table under [Value tab](#) of this wiki page for more information)
As you add each row, the existing rows will be resorted according to the sort order, or if no sort order exists, they will be sorted alphabetically by the Description field

Create Reference Code


DetailsValuesTranslationRefresh


This Reference Code currently has 5 values defined.


Code	Description	Sort	Colour	Image
Broadcast	<input type="text" value="Paid broadcast"/>	<input type="text" value="1"/>		
Agent	<input type="text" value="Agent"/>	<input type="text" value="2"/>		
HardCopy	<input type="text" value="Hard copy"/>	<input type="text" value="3"/>		
WebView	<input type="text" value="Web view"/>	<input type="text" value="4"/>		
Referral	<input type="text" value="Personal referral"/>	<input type="text" value="5"/>		

Remove All

Add new values:







[Populate from CSV.](#)

Save

5. If you need to add any translations, click on the **Translation** tab to add them (see the table under [Translation tab](#) of this wiki page for more information)

Create Reference Code

Details

Values

Translation

Refresh

This is a multi-language installation. Add descriptions for the Reference Codes for different languages below.

Language:

French (France)

▼

Name:

Catégorie de média

Code	Default	Translation	Sort
Broadcast	Paid broadcast	Diffusion payée	
Agent	Agent	Agent	
HardCopy	Hard copy	Version papier	
WebView	Web view	Vue du site web	
Referral	Personal referral	Recommandation personnelle	

Save

6. Click on the **Refresh** tab to ensure **Manually** is selected as the update method (alternatively, if you wish to schedule updates from external sources, see the table under the [Refresh tab](#) of this wiki page for more information)

Reference Code

Details

Values

Translation

Refresh

Usage

How should the Reference Code values be updated?

Manually

Scheduled Sync

Scheduled Query

Save

7. Click on the **Save** button to save your new reference codes