

Taxonomy extension creation and editing

- [Individual positions](#)
- [Taxonomy extension editor](#)
 - [General tab](#)
 - [Labels tab](#)
 - [Documentation tab](#)
 - [Anchoring tab](#)

If the library taxonomy that has been configured with the project doesn't fully cover the reporting needs, the **Tagging** tool allows for it to be extended quickly and easily. This is achieved via the **Taxonomy extension editor**, by creating additional positions that can (but don't necessarily need to) either refine or summarize the positions that are defined in the project configured taxonomy.

Note: The taxonomy extension that's created this way is automatically included in the report package that contains the **Tagging** tool results. For more details, please see the **Report package creation** chapter

Individual positions

The positions that extended the library taxonomy are displayed in the **Individual positions** grid, located in the **Individual positions** tab of the **Tagging** tab's **Taxonomy** panel. By default (i.e. if no extension positions exist), the grid is empty.

The **Individual positions** grid consists of the following columns:

- **Label**, visible by default, that displays the extension positions' standard label
- **Local part**, visible by default, that displays the extension positions' ID
- **Period**, hidden by default, that displays the extension positions' period type (i.e. instant or duration)
- **Type**, hidden by default, that displays the extension positions' data type
- **Balance**, hidden by default, that displays the extension positions' balance type (i.e. credit or debit) if applicable

Once the extension position has been created and its properties have been set up, it can be used for tagging in the same way as the library taxonomy positions are used – by dragging and dropping. As far as the **Tagging** tool is concerned, there are effectively no differences between the pre-existing library positions or these manually created individual ones.

Taxonomy extension editor

Individual positions can be created and modified via the **Taxonomy extension editor**; for creation, the tool can be invoked by clicking the **Add** button, located to the right of the **Individual positions** tab's taskbar; clicking the **Edit** icon that's aligned to the right of the row in the **Individual positions** grid where the extension position that is to be modified resides will invoke the tool for editing. Once the tool has been opened, the properties of the extension position can be set in one of the four tabs the editor consists of.

General tab

The basic properties of a position can be set in the **General** tab.

The extension position's ID (i.e. local part) can be provided in the **ID (Name)** text input. The provided ID must be unique within the already existing extension positions created for the document, can consist of alphanumeric characters only (i.e. cannot contain spaces or special characters), and cannot start with a number. Once the position's ID is provided and the changes are saved (i.e. the position is created) it cannot be modified further. This is a mandatory property.

The extension positions scope (i.e. namespace) is displayed in the **Scope (namespace)** menu. It's automatically derived from the scheme URI provided in the project configuration and it cannot be modified manually. This is a mandatory property.

The extension positions' period type can be set to instant or duration via the **Period** drop-down menu. This is a mandatory property.

The extension's position data type can be set in the **Data type** drop-down menu by selecting one of the supported data types:

- Monetary
- Decimal
- Percentage
- Text
- Text block
- Boolean
- Date

This is a mandatory property.

If the monetary data type is selected, the extension position's balance type (i.e. credit or debit) can be set in the **Balance** drop-down menu. This is a mandatory property for monetary positions.

Selecting the **Cannot be tagged** option will result in the extension position being created as an abstract position and as such, it could not be used for tagging. This option is not mandatory.

Selecting the **Null value not permitted** option will define the extension position as non-nullable (i.e. it will not be able to hold a null value). This option is not mandatory.

Labels tab

The extension position labels can be defined in the **Labels** tab by clicking the **Add** button, located in the top right corner of the tab, thus creating a new row in the **Labels** grid below. By default, the **Labels** grid is empty. Once at least one row exists, it can be modified by clicking the **Edit** icon aligned to its right and then providing the label type for the row by selecting it from the drop-down in the **Type** column, whereas the actual label for the selected type can be entered into the **Value** column.

Using the process described above, standard, verbose and terse labels can be set for the extension position, each of them in a separate grid row.

Multilingual labels are supported for each language that the library taxonomy is configured for. Translations for all three label types can be provided in by selecting one of the languages from the **Language** drop-down menu located in the **Individual positions** tab's taskbar and providing the label values in the manner described above; then selecting another language and repeating the process until all translations have been provided.

Once created, a label can be deleted by clicking the **Delete** icon aligned to the right of the row in which the label resides

Note: The label types across different languages are independent from one another; in other words, the same position can have a translation for a particular label type in one language but not have that label type defined in another language. In addition, only one row per one label type per selected language can exist in the **Labels** grid

Note: The standard label is required is required in at least one language; a position cannot be created or any change made to it saved unless a standard label exists for that extension position in at least one available language – all other label type and language combinations are optional

Documentation tab

The extension position labels can be defined in the **Documentation** tab by clicking the **Add** button, located in the top right corner of the tab, thus creating a new row in the **Documentation** grid below. By default, the **Documentation** grid is empty. Once at least one row exists, it can be modified by clicking the **Edit** icon aligned to its right and then providing the documentation type for the row by selecting it from the drop-down in the **Purpose** column, whereas the actual documentation for the selected type can be entered into the **Text** column.

Using the process described above, documentation, definition guidance, disclosure guidance, presentation guidance, measurement guidance, commentary guidance, and example guidance can be set for the extension position, each of them in a separate grid row.

Multilingual documentation is supported for each language that the library taxonomy is configured for. Translations for all documentation types can be provided by selecting one of the languages from the **Language** drop-down menu located in the **Individual positions** tab's taskbar and providing the documentation values in the manner described above; then selecting another language and repeating the process until all translations have been provided.

Once created, documentation can be deleted by clicking the **Delete** icon aligned to the right of the row in which the documentation resides

Note: The documentation types across different languages are independent of one another; in other words, the same position can have a translation for a particular documentation type in one language but not have that documentation type defined in another language. In addition, only one row per one documentation type per selected language can exist in the **Documentation** grid

Note: All documentation is completely optional

Anchoring tab

Anchoring allows to define relationships between the extension position and existing positions from the configured library taxonomy.

The extension position can be anchored to one or more positions from the library taxonomy in two ways:

- If the extension position represents a summary of two or more positions from the library taxonomy, the extension positions is anchored wider than the original positions
- If the extension position represents a refinement (i.e. only covers a part) of a position from the library taxonomy, the extension positions is anchored narrower than the original position

The extension position can be anchored by clicking the **Add** button, located in the top right corner of the tab, thus creating a new row in the **Anchoring** grid below. By default, the **Anchoring** grid is empty.

Once at least one row exists, the anchoring type (i.e. wider or narrower) for the entry can be set from the drop-down menu in the **Anchor type** column and the position from the library taxonomy the extension position is anchored to can be selected by clicking the **Edit** icon aligned to the right of the row, or by clicking the **Pick position from taxonomy panel** button in the **Position** column. This will open the library taxonomy browser in a new dialog, where the required anchored position can be specified.

This process can be repeated as many times as needed to allow for anchoring to multiple positions.

Once created, an anchoring entry can be deleted by clicking the **Delete** icon aligned to the right of the row in which the anchored position resides