



## Query Studio – Define Custom Groups

For the purpose of this illustration, a report we will create a report that shows Accounted Amount by Department and School, then define custom groups based on Department Code.

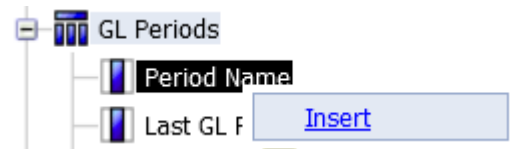
- Group 1 will include department codes AA, AB, AC
- Group 2 will include department codes BA, BY
- Group 3 will include department codes DA, DB, DC
- Group 4 will include department codes GA, GB, GC

**Log on to Cognos Analytics and launch Query Studio, then using the GL Transactions and Balances package**

### 1. Create the report

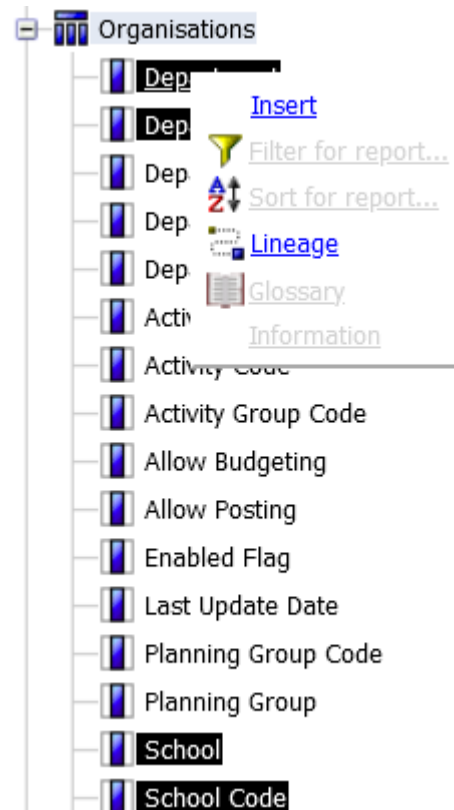
Expand the **GL Journal Transactions** name space.

Then from the **GL Periods** query subject, expand and insert Period Name,

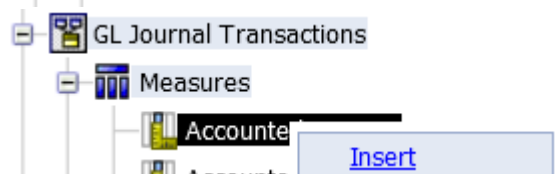


From **Organisations** query subject, insert:

- Department Code,
- Department,
- School Code,
- School



From **Measures** insert Accounted Amount





The initial report should look like this.

### **Define Custom Groups**

[Period Name: APR-20](#)

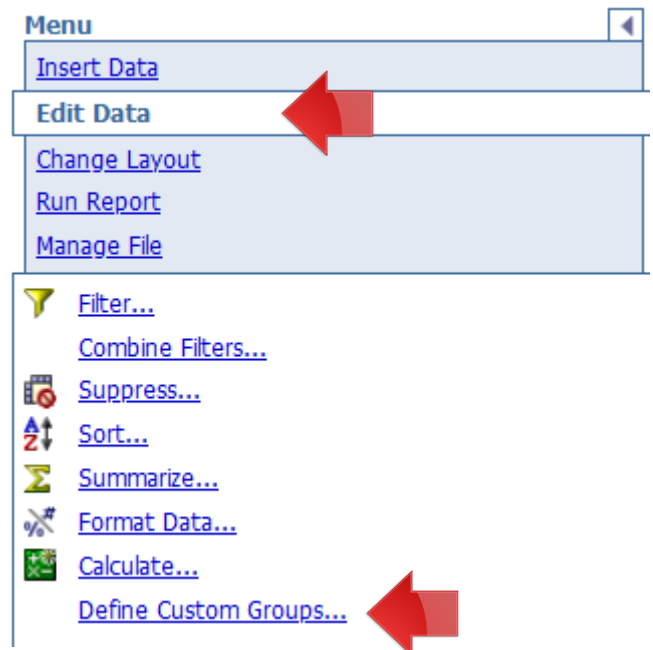
Period Name	Department Code	Department	School Code	School	Accounted Amount
APR-20	00	Balance Sheet	1100	Others	12,570,384.75
APR-20	AA	Central Admin	1100	Others	12,784,378.72
APR-20	AB	Student Registry: Student Funding	900	UAS	478,476.52
APR-20	AC	Student Registry: Operations	900	UAS	74,475.48
APR-20	AE	Vice Chancellor's Office	900	UAS	(7,398.86)
APR-20	AG	Finance	900	UAS	310,004.32
APR-20	AH	Human Resources	900	UAS	(86,037.21)
APR-20	AI	Postdoc Academy	900	UAS	43,018.55
APR-20	AJ	Governance and Compliance Division	900	UAS	33,669.13
APR-20	AK	Academic Division	900	UAS	(835,686.86)
APR-20	AN	Health, Safety, and Regulated Facilities Division	900	UAS	123,855.45
APR-20	AO	Security Office	900	UAS	(5,128.03)
APR-20	AP	BUILDINGS - FINANCE	1100	Others	(6,560,913.60)
APR-20	AQ	University Biomedical Services	900	UAS	(187,732.76)
APR-20	AR	Office of External Affairs and Communication	900	UAS	41,780.36
APR-20	AT	Cambridge Admissions Office	900	UAS	401,452.72
APR-20	AV	CFO Office	900	UAS	12,228.93
APR-20	AW	Disability Resource Centre	900	UAS	39,610.15
APR-20	AX	Administered Funds	1100	Others	915,197.15
APR-20	AY	Legal Services Division	900	UAS	120,065.56

## 2. Define Custom Groups

Select Depart Code

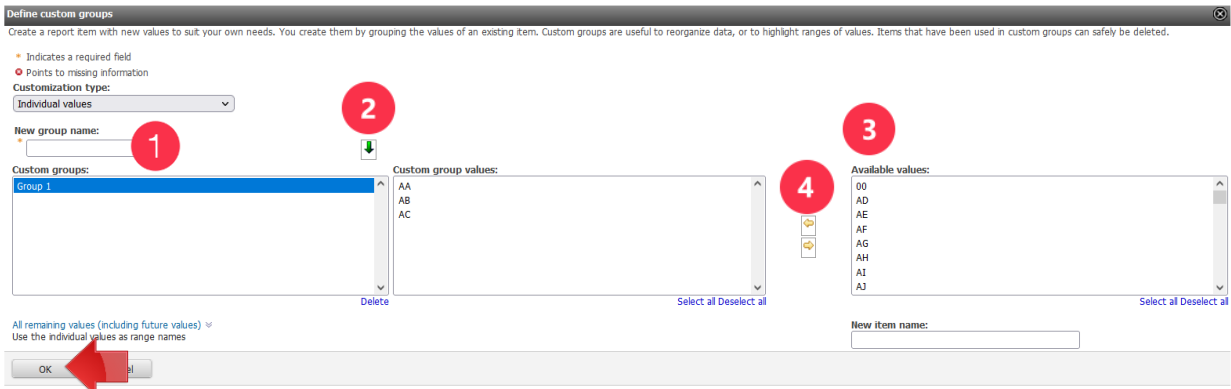
from the left hand menu pane, select **Edit Data**,

then from the results select **Define Custom Groups..**





- 1 In the Define custom groups dialogue box, enter a value in **New group name**, in this example – Group 1
- 2 Then select the **green down arrow** to populate the **Custom groups** box with the entry.
- 3 Next, in the **Available values** box, select the required values, in this example Group 1 will be AA, AB and AC.
- 4 Then select the **Add values arrow** to populate the **Custom group values** box with the selected department codes – as illustrated below.



Repeat steps 1 to 4 above as required for the custom groups.

Select **OK** to accept all entries and close the dialogue box.

The report should look as shown, with a newly added column based on the initially selected Department Code but suffixed with (Custom). This column can now be renamed appropriately.

### Define Custom Groups

Period Name: APR-20

Period Name	Department Code	Department Code (Custom)	Department	School Code	School	Accounted Amount
APR-20	00	00	Balance Sheet	1100	Others	12,570,384.75
APR-20	AA	Group 1	Central Admin	1100	Others	12,784,378.72
APR-20	AB	Group 1	Student Registry: Student Funding	900	UAS	478,476.52
APR-20	AC	Group 1	Student Registry: Operations	900	UAS	74,475.48
APR-20	BA	Group 2	Estates Division	1100	Others	8,626,352.99
APR-20	BY	Group 2	Estates Division - Administration	900	UAS	128,516.44
APR-20	DA	Group 3	Fitzwilliam Museum	1200	NSI	(49,113.86)
APR-20	DB	Group 3	Hamilton Kerr Institute	1200	NSI	1,660.88
APR-20	DC	Group 3	Kettle's Yard	1200	NSI	(84,214.20)
APR-20	GA	Group 4	School of Arts and Humanities	100	School of Arts and Humanities	87,433.63
APR-20	GB	Group 4	Architecture & History of Art	100	School of Arts and Humanities	(21,231.39)
APR-20	GC	Group 4	Architecture	100	School of Arts and Humanities	219,015.04