

## How To Create A Group of Composites

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Two of the reports in CSSI's Free Downloads area (see Free Downloads on [www.cssi.org](http://www.cssi.org)) display information about composites – the Composite Group Listing report and the Composite Validation report.

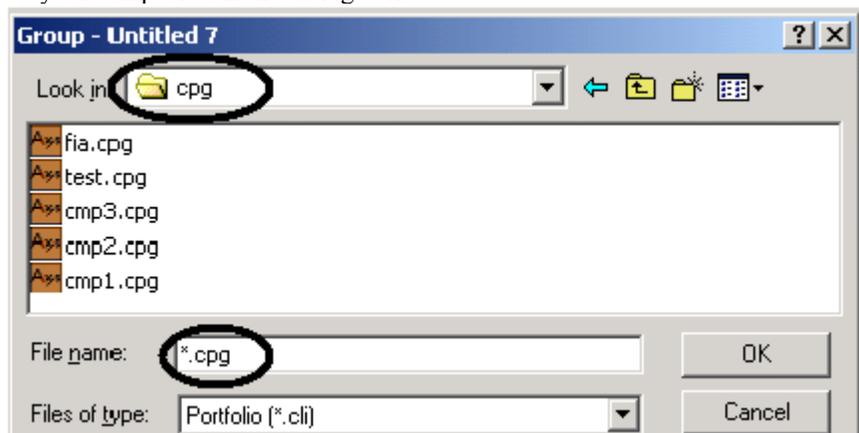
The Composite Group Listing report (`_cpgtree.rep`) allows the user to enter a group of composites, such as `@cmpgroup`). The report will display all members of each composite, along with the entry/exit date for each member.

Composite	Portfolio	Name	Entry Date	Exit Date
<b>GROUP: @cmpgroup</b> &cmp1	eb	BOROUGH	12-31-03	05-01-04
	bb	CUSTODY ACCOUNT	04-12-96	08-01-01
	in	ASSOCIATION INVESTMENT ACCOUNT	11-12-98	
&cmp2	1st	FIRST INSTITUTE	09-30-03	
	end	ENDOWMENT FUND	09-30-03	
&cmp3	perm	PERMANENT FUND	08-31-96	
	bb	CUSTODY ACCOUNT	07-31-01	02-01-05

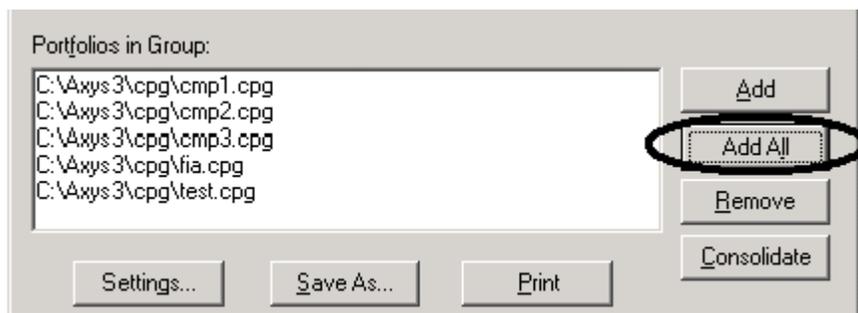
The Composite Validation report (`_cpglist.rep`) allows the user to enter any client group (such as all fee paying, discretionary clients) followed by a group of all composites (`@cmpgroup`). The report will display all members of the client group, listing all composites containing each cli (and identifying those cli not in any composite).

Shortly after we put these two reports in the Free Downloads area, the emails started coming in... "How do I create `@cmpgroup`, a Group of Composites?" In this article, I'll walk you through the process of creating just such a group. If you're ready, start AxyS and follow along.

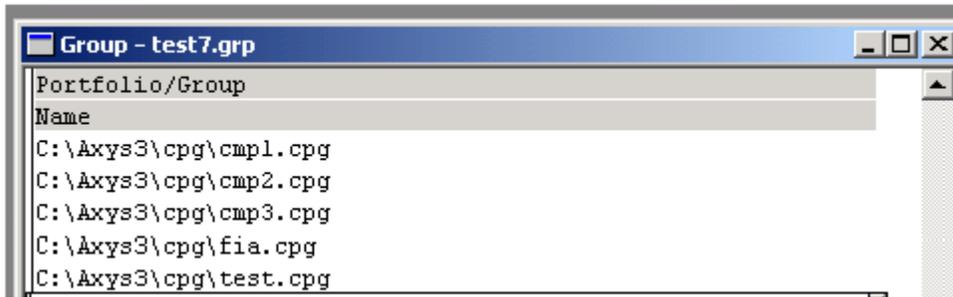
1. Create a new group in AxyS (File → New → Group)
2. Within the dialog box, navigate to your `cpg` folder AND tell it to show files named `*.cpg`. You should now see all of your composites in the dialog box.



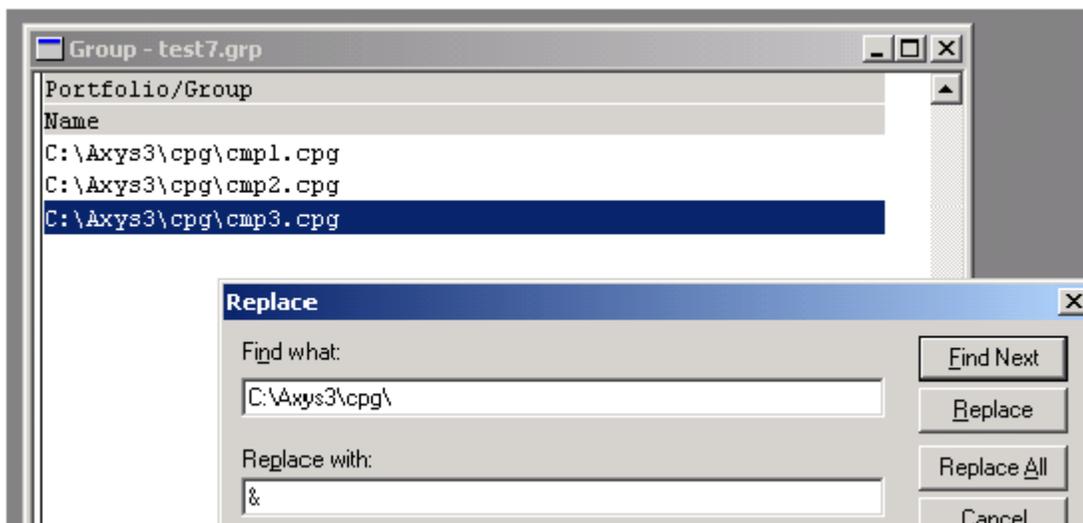
3. Click the Add All button. This is important. The process does not work unless you select Add All.



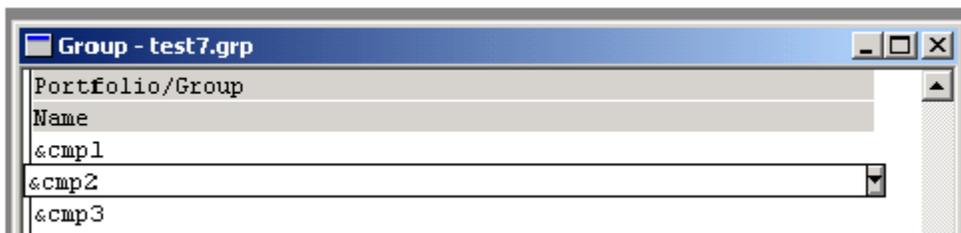
4. Save your group and give it a name (such as cmpgroup.grp)
5. Open the group. Notice that all your composites are listed, along with the full path name.



6. Since you add to Add All in step 3, this is your chance to delete any composites you do not want in this group.
7. Finally, select Edit → Replace. Replace the path name (shown above as c:\axys3\cpg\) with &, choosing Replace All.



8. Save and close. All done.



Now you have a group of composites. As always, send me an email if you get stuck!

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**About the Author:** Diane Herrera is president of CSSI, a software and consulting firm. Founded in 1995, CSSI helps firms customize and automate their Axys systems. CSSI specializes in getting data into and out of Axys with projects such as building custom interfaces, writing custom reports, creating report packages, and assisting with scripts and macros. CSSI can also assist with, or take over, back office and reconciliation functions – temporarily or permanently. Many custom reports, white papers, and other materials are available at no charge in the Free Download section of the CSSI website, [www.cssi.org](http://www.cssi.org)