ALASKA DATA ENTERPRISE REPORTING (ALDER)

ALDER 101 AKPAY FOR INTERACTIVE USERS

Revision: 5/2/2011

TABLE OF CONTENTS

CHAPTER 1
KEY POINTS OF EMPHASIS

- Error Messages
- System Security
  - User Id's and Passwords
  - Role-Based Security
- Microsoft Internet Explorer
- Secure Web-Site
- Windows Like Environment
- Cautions
- Key Terminology

Error message prompts:

You may see error messages if you do not have security access for a feature or data, or if there is a problem with the report or application. If you need to send a message to your Agency Advocate include the error message number and text or a screenshot of the error message and an explanation of what happened.

System Security:

User ID's and Passwords – When you log into ALDER, your User ID and password are authenticated using LDAP credentials. Do NOT share your User ID or password with anyone. These are the same User ID's and passwords that you use for the State of Alaska computer network system.

Role-Based Security – Your security has been established based on the level necessary to perform your job duties, which means ALDER will not display data on a report that exceeds your security level. Keep in mind that this security feature only works on ALDER (Web Intelligence) reports, and if a report is saved as an Excel or CSV file, all data will be displayed, regardless of security level. Users are responsible for the security and privacy of the data they access in ALDER. (AS 39.52.140)

Microsoft Internet Explorer:

ALDER and Knowledge Accelerator can only be accessed using Microsoft Internet Explorer v6.0 or greater. Many functions in ALDER will not work properly if another internet browser, such as Mozilla, is used.

Secure Website:

ALDER is located on a secure website and is protected by the state's firewall. Consequently, the ALDER system cannot be accessed from outside the state enterprise system.

Windows-Like Environment

ALDER is formatted into a Windows-like environment, particularly the folder structure where reports are housed. Folders may contain subfolders, and each folder can be expanded or collapsed by clicking on the " ⊞ " or " ⊟ " buttons next to each folder.

Cautions

- No Trash or Recycle Bins in ALDER There is no "trash" or "recycle" bin in ALDER, so **once the delete function for folders or reports has been chosen and confirmed, that action cannot be undone**. Use caution when deleting items in ALDER.

- System Timeouts System has a 60 minute timeout with automatic logout. This is measured from the last time you downloaded data from server (e.g., refreshed). If working on a report, save often.

Key Terminology

A list of Key Terminology can be found in the APPENDIX

CHAPTER 2

LOGGING INTO ALDER AND SETTING PREFERENCES

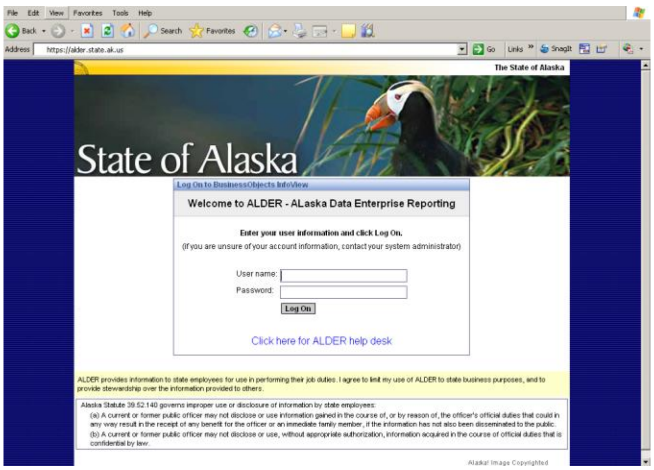
Goals and Objectives:

After you complete this chapter, you will be able to:

- Access the ALDER Web-Page
- Sign into ALDER
- Change your preferences

Access the ALDER Web-Page:

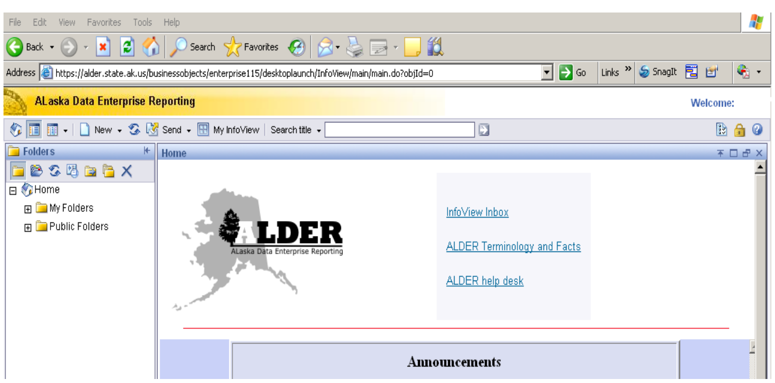
1. To use ALDER, you must first open the Microsoft Internet Explorer Web Browser.
2. Type in the web-address (URL) for ALDER
    - https://alder.state.ak.us



Note: By logging on to ALDER, you are agreeing to the principles of data stewardship and Alaska Statute 39.52.140

Signing into ALDER:

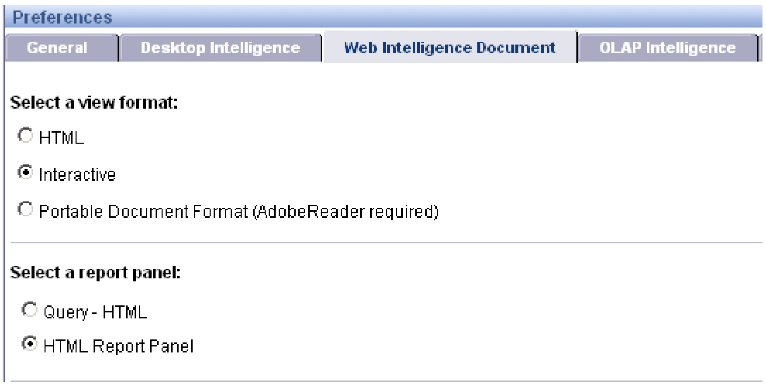
3. Enter your ALDER username and password
4. Click the Log On Button
5. If you have successfully logged in, your screen should look similar to the picture below.



Setting your Preferences to Interactive User:

As an Interactive User, you will want to verify that your ***preferences*** have been properly set.

- Click on the preference button located in the ALDER Header panel on the right. 
- Click on the Web Intelligence Document Tab
- Select a view format – Click Interactive
- Select a Report Panel – Click HTML Report Panel
- Verify that the options **selected** are the same as the picture below



- Scroll to bottom of screen and click Apply
- Scroll to bottom of screen and click OK

Setting your General Preferences:

- Click on the preference button located in the ALDER Header panel on the right. 
- Click on the General Tab
    a. My initial view is
        - Allows you to set up how your initial view of your folder structure looks when you open ALDER.

    b. On my desktop
        - Allows you to set the number of reports that are listed on each page for you to view. Recommendation is between 20 and 100 reports (default is 10)

    c. For each document, show me…
        - Allows you to change how the reports are displayed within the folders. (e.g. You may not want to see the description of every report. By unchecking the box, the report description will not automatically be shown for every report.)

    d. View my documents…
        - If you have multiple monitors, you may want to change this setting. It allows you to have multiple reports open in different windows within the single session.

    e. When I close my browser window…
        - Allows you to not be prompted every time you close your internet browser.

- When you have made all of the changes that you want to your General Preferences
    - f. Click Apply
    - g. Click OK

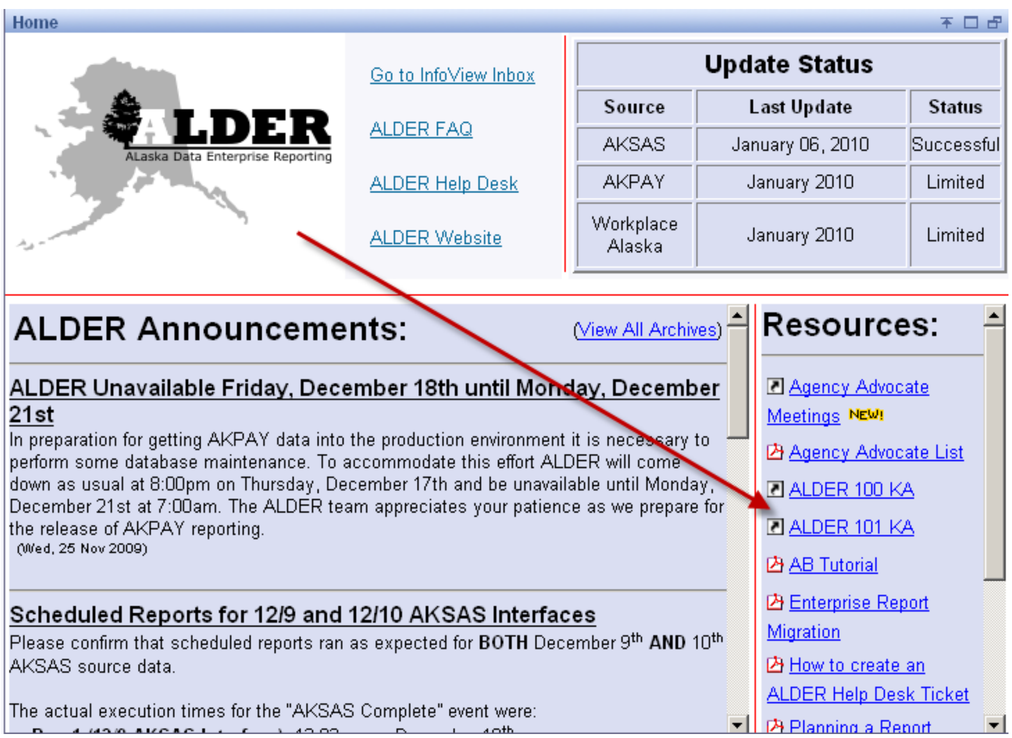
CAUTION: Do not change any other preferences other than the ones discussed here. All other preferences are system specific and any changes that you make can affect your ability to use ALDER

Summary:

After completing this section you are now able to:

- Access the ALDER Web-Site
- Change preference settings

Knowledge Accelerator (KA):



Lessons in "Try It!" mode:

- Designing Reports
- Enhancing Presentation in Reports
- Formatting Information
- Creating Custom Calculations and Variables

CHAPTER 3

Creating New Folders, Copying and Scheduling Reports

Goals and Objectives:

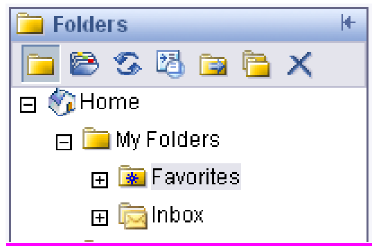
After you complete this chapter, you will be able to:

- Create a New Folder from the ALDER Header Panel
- Copy an Enterprise Report to a New Folder
- Create a New Folder while copying a report
- Move report to a new folder
- Delete a folder

Creating a New Folder:

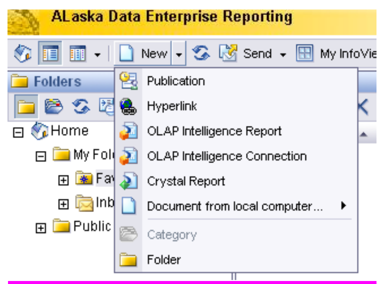
In the Navigation Panel:

- Click on the "+" next to My Folders
- Click on the Favorites Folder



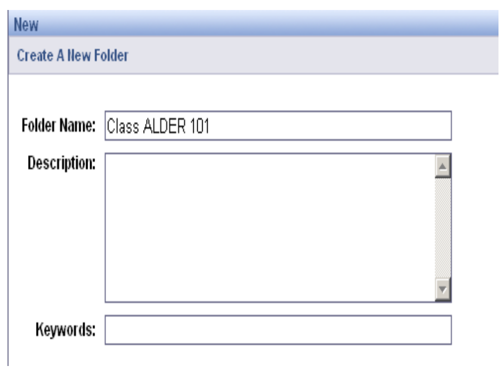
In the toolbar below the Header Panel:

- Click on the drop down arrow on the "New" Button
- Select Folder



In the Workspace Panel:

- Type in "Class ALDER 101" for the Folder Name
- You can assign a Description and Keywords to the folder.
- Click OK

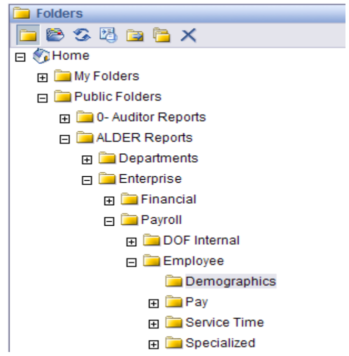


- Verify that your *Class ALDER 101* folder was created within your Favorites folder

Copy a Report and Create a New Folder:

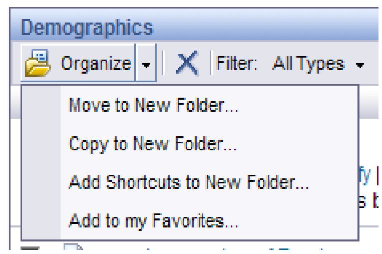
In the Navigation Panel:

- Click on the “+” next to Public Folders
- Click on the “+” next to ALDER Reports
- Click on the “+” next to Enterprise
- Click on the “+” next to Payroll
- Click on the “+” next to Employee
- Click on Demographics so that it is highlighted



In the Workspace Panel:

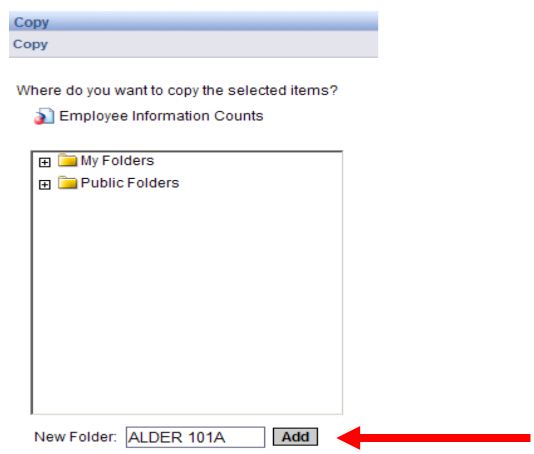
- Check the box next to **Employee Information Counts**
- Click on the drop down arrow next to the Organize Button
- Select Copy to New Folder



You should notice that a new window opened in the Workspace Panel

In the Workspace Panel:

- Click the “+” next to My Folders
- Click on the Favorites folder to highlight it
- In the New Folder box type ALDER 101A
- Click the **Add** Button

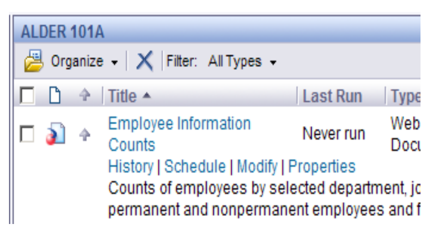


You should notice that the new ALDER 101A folder is highlighted

- Click the OK button

In the Navigation Panel:

- Expand My Folders (click the “+” next to the folder)
- Expand Favorites
- Select ALDER 101A
- Verify that the report has been copied to this folder



Move a Report and Delete a Folder:

After you copied **Employee Information Count**s report and created a new folder, you realized that this report really should be filed in the Class ALDER 101 folder and that you do not need the ALDER 101A folder. You will move the report and delete the unnecessary folder.

In the Workspace Panel:

- Check the box next to **Employee Information Counts**
- Click on the drop down arrow next to the Organize Button
- Select Move to New Folder
- Expand My Folders
- Expand Favorites
- Select Class ALDER 101
- Click the OK button
- Verify that the ALDER 101A folder is empty
- Verify that the report was moved to Class ALDER 101

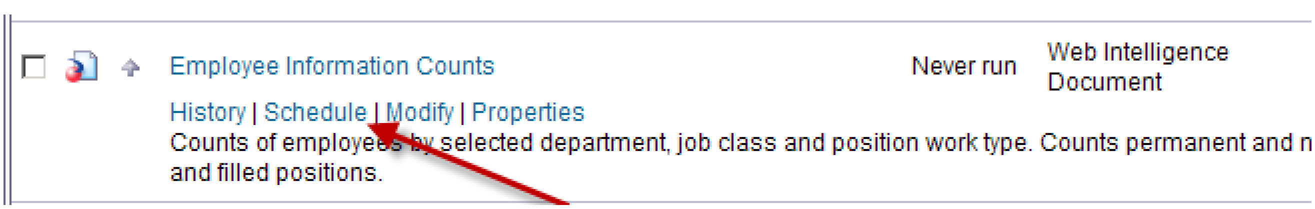
In the Navigation Panel:

- Verify that the ALDER 101A folder is highlighted
- Click the “X” button on the Navigation Panel toolbar
- Select the OK button to delete the folder
- Verify that the folder has been deleted

  CAUTION: A folder and its entire contents can be deleted using this method and there is no trash or recycle bin in ALDER

Scheduling a Report:

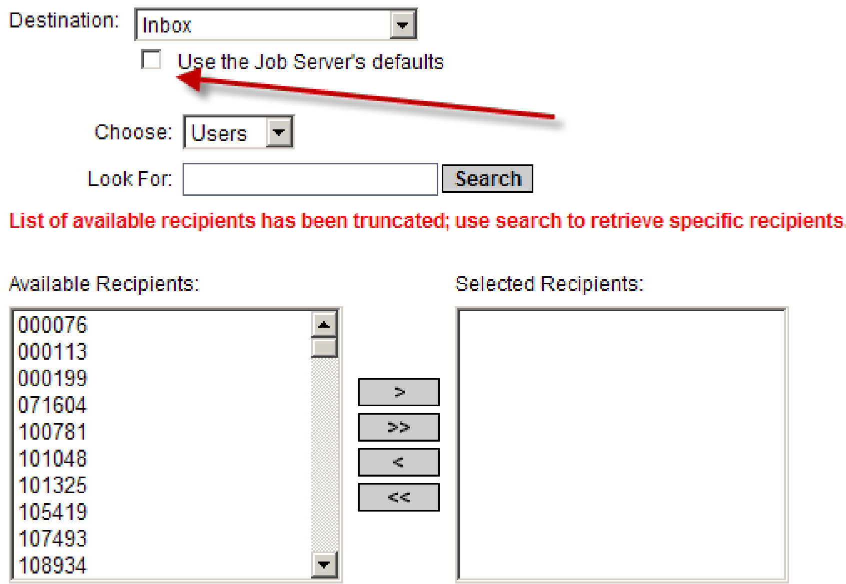
Scheduling reports allows you to run reports on your timeframe. In your Favorites folder under Class ALDER 101 in **Employee Information Count**s report and click on Schedule under the report title.



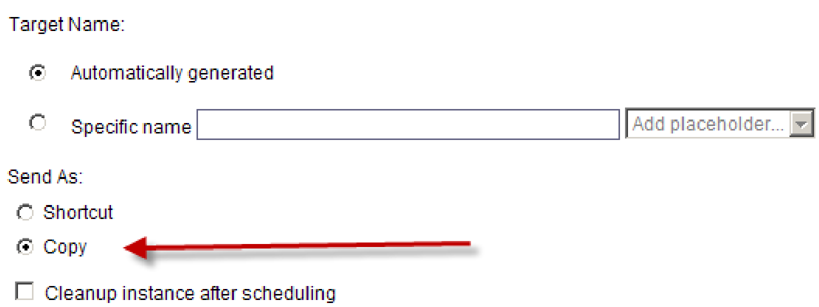
The Scheduling work area will open with the report title in the Instance Title.

- Open the dropdown box under **<u>When</u>** and notice the options of scheduling reports. We will select “Now”.
  - Notice if you choose Once you can choose at date and a time, you will need to choose an “Event” if the date is not today.
  - Also notice that you can choose other options such as weekly or monthly. These can be chosen once we have relative object as available for AKPAY data.
  - When you choose these you will be able to choose a day and time.
  - If you choose any of these options be sure to choose an Event (below).

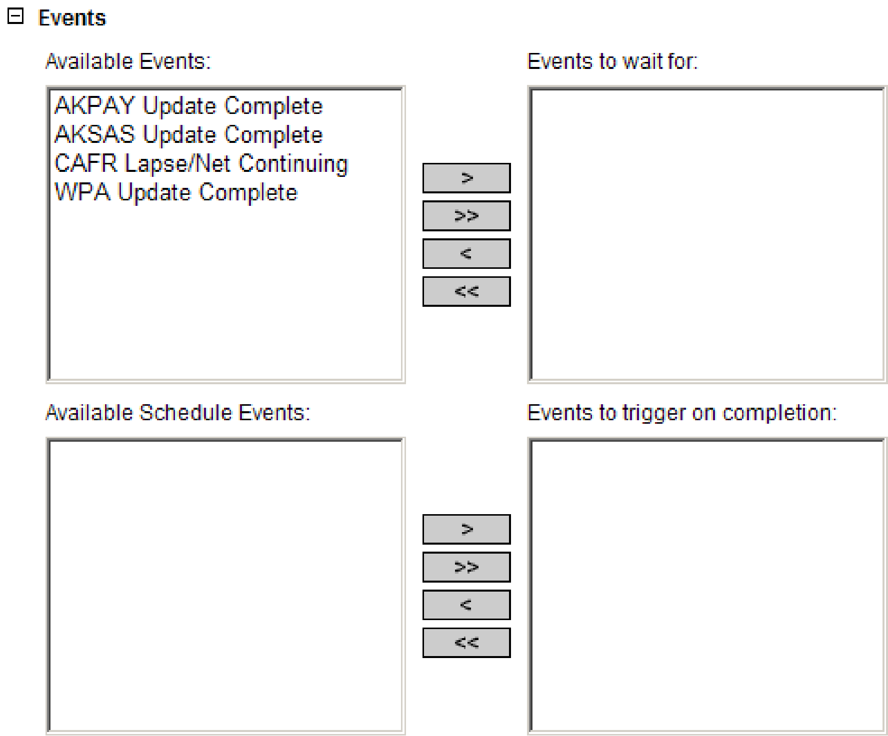
- The **Destination** area gives three options
  - Default Enterprise Location will place the instance under the report name. We will choose this for our report.
  - Inbox – Inboxes for ALDER Users are identified by Employee ID; because the Available list is truncated it is best to know the Employee ID of the person you need to send it to. Make sure the “Use Job Server’s defaults” is unchecked so you can enter the recipient’s ID.



And send as a Copy



  - Email – Allows entry of any email address
- **Format** has three options Web Intelligence, Microsoft Excel and Adobe Acrobat.
  - Web Intelligence is for those who receive the report in their Business Objects Inbox
  - Excel and Adobe are for those who receive the report in their email.
- Caching Options and Server Groups are left alone to go to pre-set defaults
- **Events** are very important to use if you are scheduling anything other than “Now”. This allows the scheduled report to wait until the chosen Event runs before the scheduled report starts to run. This is especially important for reports where you expect the data in ALDER to be updated before your scheduled reports run. In our case because we are scheduling Now we do not want to choose an Event.



- **<u>Prompts</u>** can be updated here and we will input this information

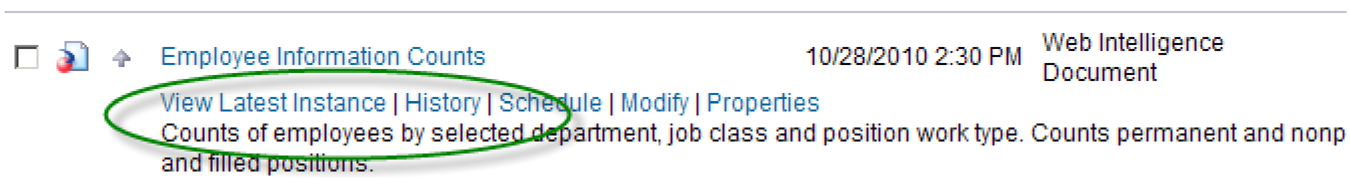
  Report Effective Date: Today

  Report Point in Time: Today

  Dept Num: 7

  Calendar Year Begin Date: 1/1/2010

Click Schedule and go back into your Class ALDER 101 folder. Notice the change to your screen.



If you click of View Latest Instance you will see the report as you scheduled it to run. If you choose history you will see the instance(s) and status of your report.

<u>Summary:</u>

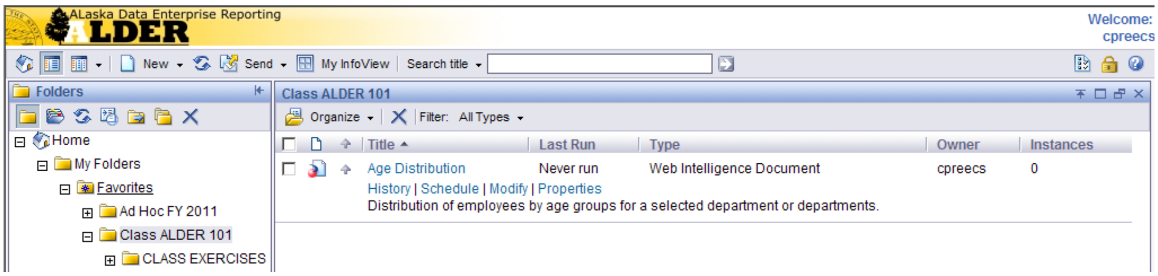
After completing this chapter, you are now able to:

- Create a New Folder
- Copy a Report
- Move a Report
- Delete a Folder
- Schedule a Report

Exercise:

Instructions:

1. From the *Enterprise/Payroll/Employee/Demographics* folder locate the report titled **Age Distribution**
2. Copy this report to a new folder
3. Add a New Folder under your *Class ALDER 101* folder titled *Class Exercises*
4. Verify that your new folder has been added
5. Verify that the report was copied to your new folder



6. How many ways are there to create a new folder in ALDER?

7. Describe the different ways to create a new folder.

CHAPTER 4

Workspace Panel Toolbar within a Report

Goals and Objectives

Open a Report

Maximize Real Estate

Definition of Buttons

Toolbars

Standard Elements of an ALDER Report

Goals and Objectives:

After you complete this chapter, you will be able to:

- Open and View a report
- Maximize your Real Estate
- Define buttons on the toolbar
- Define the Standard Elements of an ALDER Report
- Activate/Inactivate toolbars

Open a Report:

In the Navigation Panel:

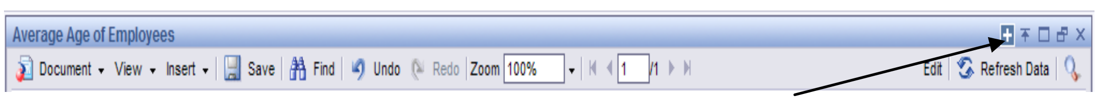
- In the *Enterprise/Payroll/Employee/Demographics* folder locate the report titled **Average Age of Employees** and copy to your *Class ALDER 101* folder

Note: Find the document in your *Class ALDER 101* folder, click on the document name.

Maximize the Workspace Panel:

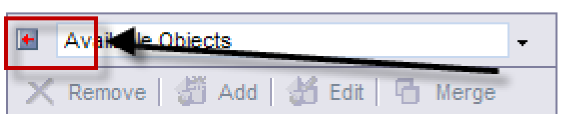
In the Workspace Panel:

- There are 2 ways to maximize the Workspace Panel – also called “Maximizing your Real Estate”
  - This can be done by clicking the single SQUARE box on the blue bar in the Workspace Panel and press F11 to hide the internet toolbar (to get the internet toolbar back press F11 again)



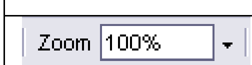
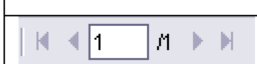
Single Square Box

  - The second method is to close the Report Panel.



Definition of Buttons:

Button/Drop Down List	Options	Function in ALDER
Document ▾	Close	Closes the report
	Edit	Not allowed for Interactive Users
	Save	Opens the Save Document Panel
	Save as	Opens the Save Document Panel (See directions to disable Pop-up Blocker)
	Save to my computer as	Allows the User to extract the data to Excel, Adobe, or a CSV File
	Properties	**Opens the property pane for the current report**

	Page mode Draft mode PDF mode Left panel Status Bar **Toolbars** **Preferences**	Shows how the report looks with headers and footers and the number of pages in the report Shows the report with no headers or footers and is one continuous page Shows how the report will look in Adobe and allows the user to print the report from inside of ALDER Opens and Closes the "Report" Panel Opens and Closes the status bar at the bottom of the Workspace Panel **Opens and Closes individual toolbars within the Workspace Panel** **Sets User Preferences for all reports**
 **For this button to work, the report, chart, or table must be selected**	**New row** **New column** **Break** **Filter** **Sort** **Calculation**	**In Table – Inserts a New row above or below the current row selected** **In Table – Inserts a New column to the left or right of current column** **In Table – Adds or Removes a break to the data** **On the report or in a table, applies a user defined filter** **In Table – Applies or removes ascending, descending, or custom sorts** **In Table – Applies a calculation at the Break in the data**
		This button is only available when the user has opened a report within their My Folders structure
		Page Mode – Only searches for information on the current page Draft Mode – Searches the entire report
		Allows User to Undo or Redo previous actions
		Allows User to Zoom in or out of data for viewing purposes
		When User is in Page Mode, tells you which page of the report you are on. To find total number of pages, the User must go to the final page
		Allows the User to refresh data or change the prompts for the report to get different data.
		For reports that have this ability, allows user to drill through a report to get to greater detail; for instance, a report of summarized information such as appropriation expenditures could be drilled down to get collocation code detail information. This is available in Financial Reports only

In the table above, the differences between ALDER 100 (Report Viewer) and ALDER 101 (Interactive User) have been **bolded**.

Insert New Row:

- Click on the last row of the Selections Box
- Click on the Insert button
- Select New Row
- Select Below

Insert New Column:

- In the data table, in the Blue Box titled **All Employees**, right click on the Blue Box titles **Average Age** (2nd column of the data table)
- Click on the 2nd column of the Gray area
- Click on the Insert button
- Select New column
- Select Left

Notice that the Blue Header Row is now 1 column longer.   NOTE: Some reports in ALDER do not have the Blue Header Row connected to the Gray data area. This is more prevalent in financial reports. When inserting new columns, you need to make sure that the column formatting lines up between the Blue Header Row and the Gray data area

Another way to accomplish this is

- Right click on the 2nd column of the Gray area
- Select Insert
- Select New column
- Select Left
- Scroll to the end of the data table

To add text in the blue header box click on the box, go to the formula toolbar and type the information in and press enter.

Delete Row:

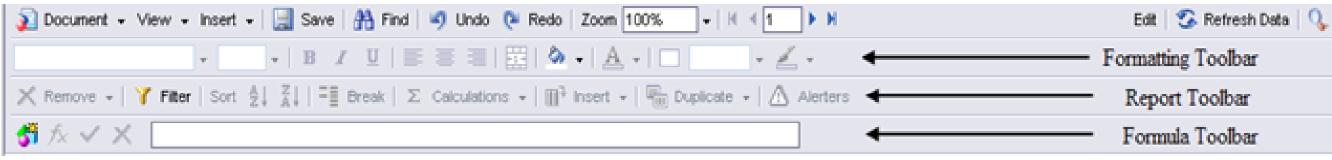
- Click on the last row of the Selections Box
- Right Click
- Select Remove
- Select Row

Delete Column:

- In the data table, click on the Blue Box titled **EE Dept** (2nd column of the data table)
- Click on the column
- Right Click
- Select Remove
- Select column

Activate Toolbars:

- Using the View Button, activate all toolbars
- Once all of the toolbars are activated, the top of your Workspace Panel should look like this:



Note: You can also activate the toolbars by right clicking with your mouse in the GRAY area of the toolbars

Standard Elements of an ALDER Report:

- HEADER:
  - ALDER Logo – Upper Left Hand corner on all pages of a report
  - Title – Top of all pages for the report
  - Last Refreshed Date – Upper Right Hand corner on all pages of a report
- FOOTER:
  - Report Name – Bottom Left Hand corner of all pages
  - Page Number – Page X of Y on all pages of report

Summary:

After completing this chapter, you are now able to:

- Open and View a report
- Maximize your Real Estate
- Define buttons on the toolbar
- Define the Standard Elements of an ALDER Report
- Activate/Inactivate toolbars

Review:

1. How do you open a report to view it?

2. What is the difference between viewing a report in Page Mode vs. Draft Mode?

3. In ALDER, how can you print a report?

4. Identify the 3 different ways that you can save your report to your computer.

5. What are the 2 different ways to maximize your real estate?

6. What are the standard report elements?

7. What are the 2 ways that you can activate/inactivate your toolbars?

8. When is the only time that you have a “SAVE” button?

CHAPTER 5

Report Panel

- Goals and Objectives
- Document Summary
- Data Summary
- Available Objects
    - Dimensions
    - Measures
    - Detail
    - Drag and Drop Objects on to the report
    - Remove Objects from the data table
- Charts and Table Types
- Document Structures and Filters
- Navigation Map
- User Prompt Input

Goals and Objectives:

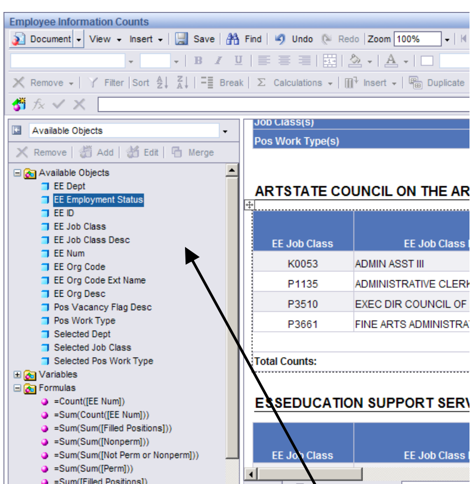
After you complete this chapter, you will be able to:

- Identify the Report Panel
- Move between the Report Panel menu items
- Identify and Define Available Objects
- Add or Remove Available Objects
- Add Charts, Tables, and Cells
    - To the Report
    - To Sections
- Use the Navigation Map to find information within the Report
- Identify the report outline using Document Structures and Filters
- Input data into User Prompt

Introduction:

We are going to review the various drop down menus within the Report Panel

- Open **Employee Information Counts** from your *Class ALDER 101* folder
- Maximize your real estate
- Click the Refresh Data button and use these prompts
    - Report Effective Date: 1/12/2009
    - Report Point in Time Date: 1/12/2009
    - Dept Num(s): 5
    - Pos Work Type(s): ALL
    - Job Class Code(s): ALL
- Click Run Query
- The Report Panel is located on the left side of your report



Report Panel

Document Summary

- Displays the property-type information of the report
- Displays the prompts that were selected
- Print button in this panel only prints the information located in the document summary

Data Summary

- Displays all of the objects (data fields), the description of the objects, Document Variables, and Formulas used on the report
- Print button in this panel only prints the information located in the data summary

Available Objects

There are 3 distinct folders under the Available Objects Menu.

1. Available Objects
2. Variables
3. Formulas

Available Objects

- Represents information that is available to be displayed on the report. The information is categorized in 3 different types of objects:
  - Dimensions (Blue cube)
    - These objects contain data that we can count. (e.g. Employee's Name, Department, Contact Code, Job Class, etc.)
  - Measures (Pink ball)
    - These objects contain data that we can calculate on. (e.g. Employee Count, Length of Service in a Job Class, etc.)
  - Details (Green pyramid)
    - At this time only the AKSAS data is using this object with EP Warrants. These Details contain data that we would not aggregate or calculate on.
- Not all listed Available Objects are displayed on a report.
- Objects are listed in Alphabetic order by object type.

Variables

Variables can be:

- Dimensions, Measures, or Details
- Formulas that you have assigned a name
- Formulas from the universe
- Objects that can be filtered on

Formulas 

- Calculation that you can create to display data that is not retrieved by existing objects
- The actual formula is displayed as the object
- Becomes an object that can be placed on the report

Dragging and Dropping Available Objects onto the Report:

Any time that you drag an object to be displayed on the data table, you want to make sure that you do not drag it into the BLUE header row. For some of the reports in ALDER, the Blue header row and the data table are not connected. (Often in financial reports) When the header row and data table are not connected, you place the object in the data table and insert a column in the header row.

- From the Available Objects list, find the object "**EE Employment Status**"
- Click on the object and hold the mouse button down while dragging the object onto the report
- Drag it into the 3rd column of the data table between **EE Job Class Desc** and **Permanent Employees**
- Shorten the column with as you would in Excel by hovering over the column line, clicking on the line once it becomes a double arrow, hold the mouse key and slide the column to the left.

Note:

- Make sure that you have a skinny red line to the side of the column that you want to place the object.
- A thick red block replaces the existing data in the column
- A skinny red line at the bottom or top of the row will try to insert the new data in a different row causing your report to have blank lines.

- If you were successful, your columns should look like:

ARTSTATE COUNCIL ON THE ARTS

EE Job Class	EE Job Class Desc	EE Employ ment	Permanent Employees	Nonperm Employees	Employees - not Permanent or Nonperm	Total Employ
K0053	ADMIN ASST III	PR	1	0	0	1
P1135	ADMINISTRATIVE CLERK III	PE	1	0	0	1
P3510	EXEC DIR COUNCIL OF ARTS	PX	1	0	0	1
P3661	FINE ARTS ADMINISTRATOR II	PE	2	0	0	2
Total Counts:			5	0	0	5

ESSEDUCATION SUPPORT SERVICES

		EE			Employees - not	

Removing Objects from the Data Table:

You can remove objects or columns from your data table that are not needed for your report

- Right Click on the column **EE Job Class** Make sure that the area behind the data is gray
- From the menu that pops up, select Remove
- Select Column
- Remove the column
- If you were successful, your columns should look like:

ARTSTATE COUNCIL ON THE ARTS

EE Job Class Desc	EE Employ ment	Permanent Employees	Nonperm Employees	Employees - not Permanent or Nonperm	Total Employees	Filled Positions
ADMIN ASST III	PR	1	0	0	1	1
ADMINISTRATIVE CLERK III	PE	1	0	0	1	1
EXEC DIR COUNCIL OF ARTS	PX	1	0	0	1	1
FINE ARTS ADMINISTRATOR II	PE	2	0	0	2	2
Total Counts:		**5**	**0**	**0**	**5**	**5**

ESSEDUCATION SUPPORT SERVICES

EE Job Class Desc	EE Employ ment	Permanent Employees	Nonperm Employees	Employees - not Permanent or Nonperm	Total Employees	Filled Positions
ACCOUNTING SPVR II	TT	0	1	0	1	1
ACCOUNTING TECH I	PE	1	0	0	1	1
ACCOUNTING TECH II	PE	1	0	0	1	1

- Save the document as **Employee Information Counts New Object** in your *Class Exercises* folder.

Review:

1. What is an Available Object?
2. Are all Available Objects Displayed on the report?
3. What are the different types of Available Objects?
4. What is the difference between a variable and a formula?

Exercise:

1. From the *Enterprise/Payroll/Position/Statistics Reports* folder, copy the report **Position Detail by Org Code, Position Work Type and Job Class** to your *Class ALDER 101* folder.
2. Go to your *Class ALDER 101* folder and open the report.
3. Maximize your real estate
4. Refresh Data:
    - Report Effective Date: 7/6/2010
    - Report Point in Time Date: 7/6/2010
    - Report Range Begin Date: 7/6/2010
    - Report Range End Date: 7/6/2010
    - Pos Work Type: ALL
    - Dept Num(s): 10
    - Region(s): 10
    - Division(s): 4
    - Section(s): 999
    - Job Class Code(s): ALL
5. Remove the columns **EE MAD, EE R/O,EE Acting, EE Range, EE Step, EE SS, EE OT Exempt**
6. Insert the object **EE ID** in the data table between the columns for **Pos BU** and **Employee Name**

Your report should look like:

Position Detail by Org Code, Position Work Type and Job Class

Report Effective Date	7/6/2010
Report Point in Time Date	7/6/2010
Report Range Date	7/6/2010 - 7/6/2010
Department(s)	10
Region(s)	10
Division(s)	4
Section(s)	999
Position Work Type(s)	ALL
Job Class(es)	ALL

NATURAL RESOURCES

PCN	Pos Type	Pos Reg	Pos Div	Pos Sec	Pos Location	Pos BU	EE ID	Employee Name	Pos Class Code	Pos Class Description
100216	FACL	10	04	99	ANCHORAGE	SS	219089	HAGEN,MARLYS K	P1334	PROCUREMENT SPEC IV
100225	FACL	10	04	99	ANCHORAGE	GG	229448	JOHNSON,DONNA A	P1212	ACCOUNTING TECH III
100229	FACL	10	04	99	ANCHORAGE	GG		VACANT	P1211	ACCOUNTING TECH II
100232	FACL	10	04	99	ANCHORAGE	GG	231646	GRUNZA,DEBRA A	P1211	ACCOUNTING TECH II
100235	FACL	10	04	99	ANCHORAGE	GG	314805	WILLIAMS,KENNETH M	P1331	PROCUREMENT SPEC I
100236	FACL	10	04	99	ANCHORAGE	GG	309206	QUERIPEL,STACIE M	P1203	ACCOUNTING CLERK
100237	FACL	10	04	99	ANCHORAGE	GG	305185	ZIEMER,KRISTEN J	P1132	MAIL SVCS COURIER
100241	FACL	10	04	99	ANCHORAGE	GG		VACANT	P1210	ACCOUNTING TECH I
100243	FACL	10	04	99	ANCHORAGE	GG	308134	PARKER,KATHLEEN A	P1210	ACCOUNTING TECH I
100245	FACL	10	04	99	ANCHORAGE	GG	226442	DENNY,DEBRA L	P1331	PROCUREMENT SPEC I
100248	FACL	10	04	99	ANCHORAGE	SS	218491	COWLES-BRUNTON,CRISTIN M	P1207	ACCOUNTANT IV
100249	FACL	10	04	99	ANCHORAGE	SS	308543	LOTOSH,OLGA	P1205	ACCOUNTANT II
100260	FACL	10	04	99	ANCHORAGE	GG	281102	KARJALA,DONNA A	P1210	ACCOUNTING TECH I
100261	FACL	10	04	99	ANCHORAGE	GG	313160	KENDALL,JODY L	P1203	ACCOUNTING CLERK
100293	FACL	10	04	99	ANCHORAGE	GG	289539	WELLS,WARD W	P1332	PROCUREMENT SPEC II
100298	FACL	10	04	99	ANCHORAGE	GG	305354	O'FARRELL,MICHELLE L	P1135	OFFICE ASSISTANT II

7. Save the report as: **Position Detail with Current Incumbent** in your *Class Exercises* folder

Charts and Table Types:

- *Enterprise/Payroll/Employee/Demographics* folder and copy **Employee Count by Ethnicity and Sex** to your Class ALDER 101 folder
- From your *Class ALDER 101* folder, open the report **Employee Count by Ethnicity and Sex**
- Change the prompts to the following and run the query
    - Report Effective Date: 1/11/2009
    - Report Point in Time Date: 1/11/2009
    - Department(s): 4
    - Region(s): 999
    - Division(s): 999
    - Section(s): 999

- In the Report Panel, select Chart and Table Types

All Enterprise Reports in ALDER have at least 2 existing tables on them.

1. Horizontal Table is the Selections Box, which displays the user prompts
2. Vertical Table displays the data results

ALDER has the ability to display data in 3 different formats

1. Tables are used to display summary or detail information such as account number, document numbers, amounts, date processed, etc.

2. Charts are used to graphically display the business information based on the user prompts

3. Cells are used to display information that adds meaning to your report such as:
   - Text Comments
   - Formulas or calculations
   - Page Numbers
   - Document Name

There are 2 areas on the report that charts, tables, or cells can be placed.

1. The page body will display your chart, table, or cell at the top of the report and will compile data based on the entire report.

Report Effective Date	1/11/2009
Report Point in Time Date	1/11/2009
Department(s)	4
Region(s)	999
Division(s)	999
Section(s)	999

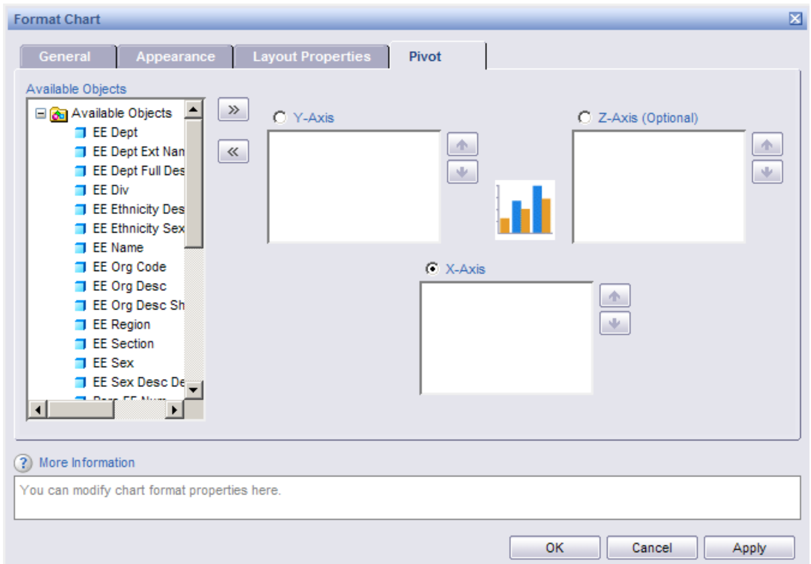
2. Placing a chart, table, or cell next to an existing data table will compile your data based on the sectioning of a report. HINT: You will need to shorten the last 4 columns.

Department: 04 - REVENUE

EE Region	EE Div	EE Section	EE Ethnicity De	Male	Female	Totals
01	01	02	WHITE	1	3	4
01	01	05	WHITE	1	2	3
01	01	06	WHITE		1	1
01	01	07	WHITE	4		4
01	02	01	WHITE	1	1	2
01	03	01	WHITE		1	1
01	03	02	AMERICAN IND		1	1
01	03	02	HISPANIC		1	1
01	03	02	WHITE	7	6	13
01	03	03	ASIAN		1	1
01	03	03	WHITE	2	5	7
01	03	04	WHITE	1		1

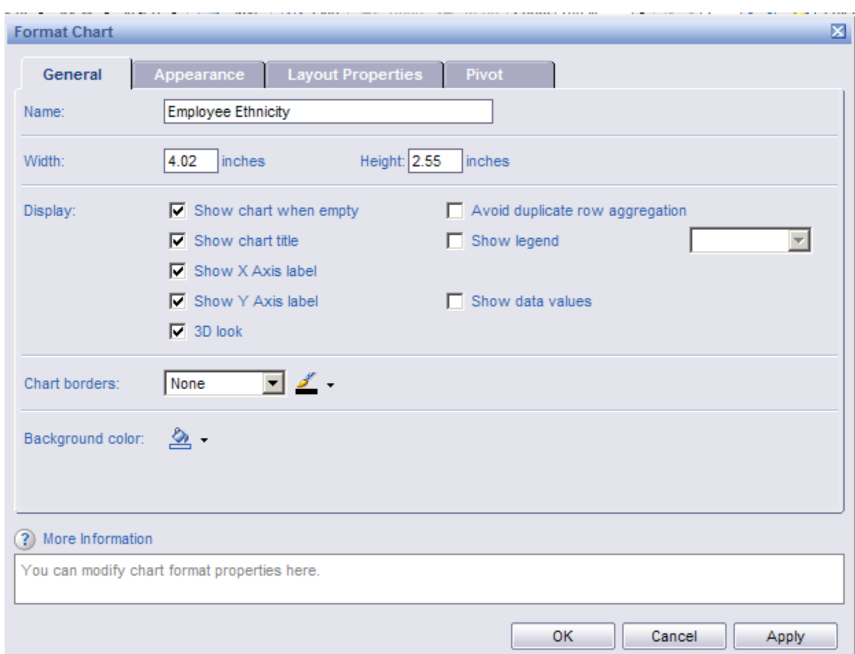
Note: When you drag a chart, table, or cell onto the report, make sure that where you are placing the object has a gray background.

1. Adding a chart, table or cell to the entire report
    - On the Report Panel under Chart Elements, click on the + in front of Bar Charts. Drag a **Vertical Grouped** bar chart onto the report next to the Selections Box
    - A box for formatting the chart will automatically pop-up on your screen

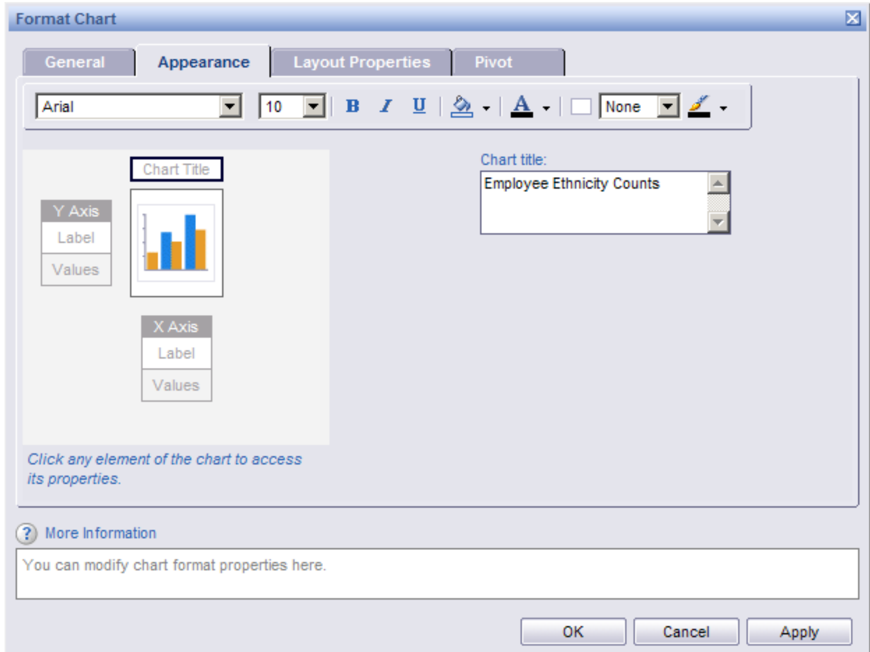


    - For the X-Axis select the object **EE Ethnicity Desc**
    - For the Y-Axis select the object **Count([Pers EE Num])**
    - Click Apply
    - Click on the General tab
    - Change the Name of the chart to **Employee Ethnicity**
    - Check the box to Show chart title

    Note: Having this box checked allows you to put a title on the chart

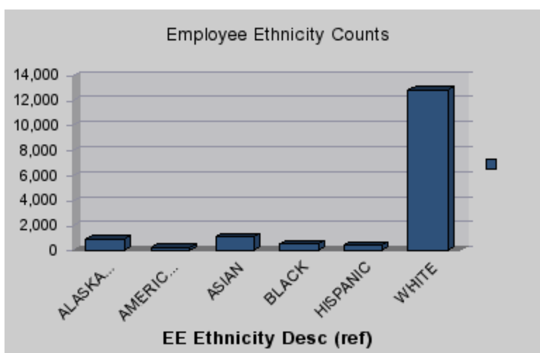


- Click Apply
- Select the Appearance tab
- Click on Chart Title and type in **Employee Ethnicity Counts**



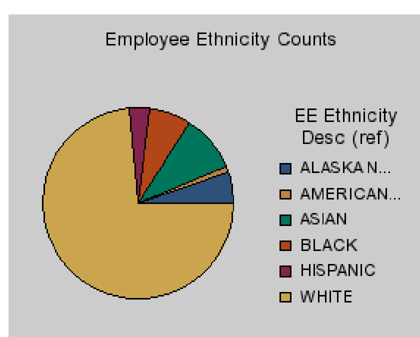
- Click Apply
- Click OK

Your report with a vertical table should look like this:



- You can easily change this to a Pie Chart by dragging the Pie Chart object onto the Vertical table. The vertical table must turn gray before you let go of the Pie Chart object.
- Your pie chart should look like this:

Report Effective Date	1/11/2009
Report Point in Time Date	1/11/2009
Department(s)	4
Region(s)	999
Division(s)	999
Section(s)	999



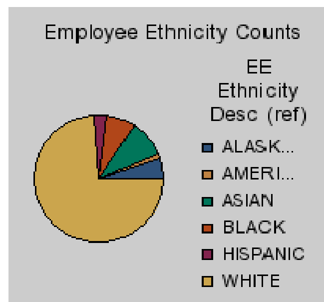
2. Adding a chart, table or cell beside the data table (sections)
    - Drag a Vertical Grouped bar chart onto the report next to the data table

Note: Do not try to drag the chart closer to the data table. We will format the chart to change the location within the report!

- For the X-Axis select **EE Sex Desc (Default)**
- For the Y-Axis select **Count([Pers EE Num])**
- Click Apply
- Click on the Layout Properties tab
    - The left of this chart is .25 inches to Right Side of Data
    - The top of this chart is .5 inches to Top Side of Data
- Click Apply
- Click OK

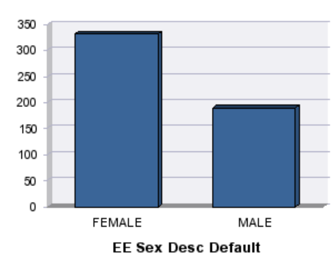
You should now have 2 charts on the first page your report should look similar to this:

Report Effective Date	1/11/2009
Report Point in Time Date	1/11/2009
Department(s)	4
Region(s)	999
Division(s)	999
Section(s)	999



Department: 04 - REVENUE

EE Region	EE Div	EE Section	EE Ethnicity Des	Male	Female	Totals
01	01	02	WHITE	1	3	4
01	01	05	WHITE	1	2	3
01	01	06	WHITE		1	1
01	01	07	WHITE	4		4
01	02	01	WHITE	1	1	2
01	03	01	WHITE		1	1
01	03	02	AMERICAN INDI/		1	1
01	03	02	HISPANIC		1	1
01	03	02	WHITE	7	6	13
01	03	03	ASIAN		1	1



Save and name the report **EE Counts by Sex & Ethnicity Charts** in you *Class Exercises* folder

Review:

1. What type of chart, table, or cells exists on all ALDER Enterprise Reports?

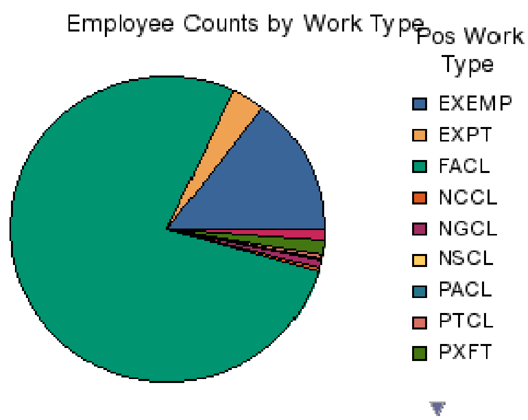
2. What are the 3 different formats to display data and what are the differences?

3. What are the 2 area's that you can display charts, tables, or cells?

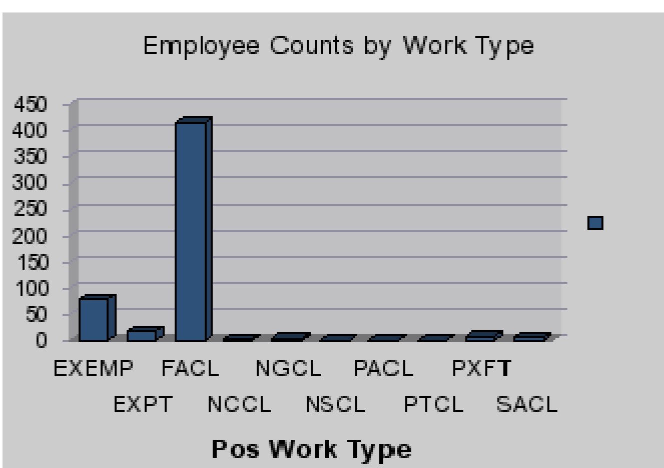
4. How do you display a chart title?

Exercise:

1. Open **Employee Information Counts** in your *Class ALDER 101* folder.
2. Maximize your real estate
3. Refresh Data:
    - Report Effective Date: 1/15/2010
    - Report Point in Time Date: 1/1/2010
    - Department(s): 4
    - Pos Work Type: ALL
    - Job Class Code: ALL
4. Drag a Pie Chart onto your report next to the Selections Box
    - For the X-Axis select **Pos Work Type**
    - For the Y-Axis select **Count([EE Num])**
5. Change the chart name to **Employee by Work Type**
6. Add the Chart Title **Employee Counts by Work Type**
7. Your chart should look like this: (DO NOT TRY TO MOVE THIS CHART WITH YOUR CURSOR)



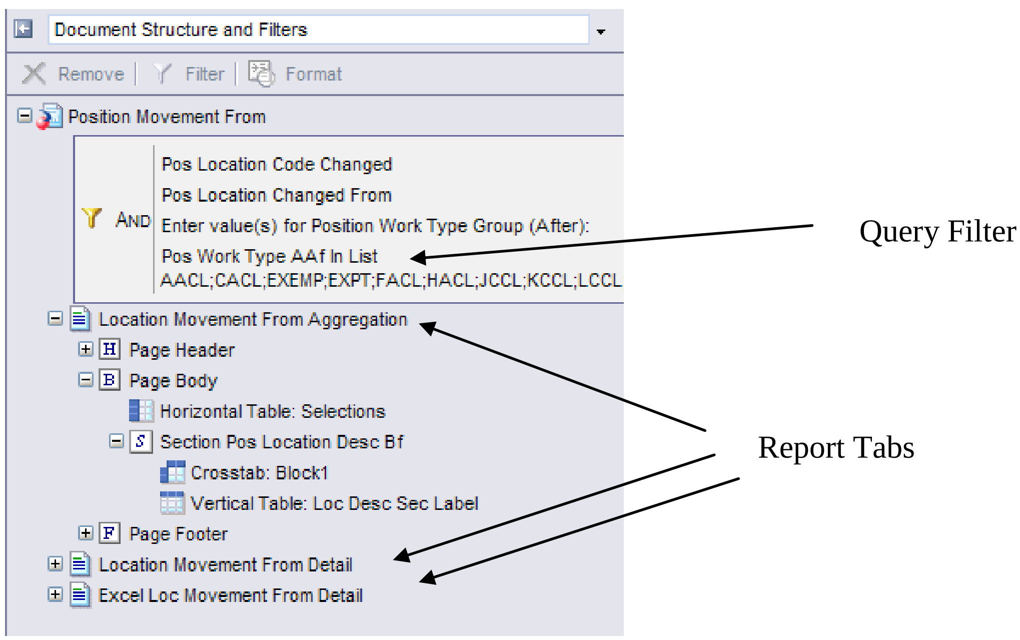
8. Change the chart from a pie to a Vertical Grouped Bar Chart
9. Your chart should look like this:



10. Save your report as **Employee Information Counts Chart** in your *Class Exercises* folder.

Document Structures and Filters:

- Find the **Position Movement From** report from *Payroll/Positions/Statistics* folder. Copy it to your *Class ALDER 101* folder
- Open the **Position Movement From** report from your *Class ALDER 10*1 folder
- Refresh with these parameters
  - Location Codes: AWA;EBA;JBA;ACA
  - Report Effective Date: 6/30/2010
  - Position Work Type Group: Classified;Partially Exempt
  - Date Range Begin: 7/1/2009
  - Date Range End: 6/30/2010
  - Position Location Change From: AWA;EBA;JBA;ACA
- In the Report Panel, select Document Structures and Filters
- This menu item is like an outline for your entire report
- Your Report Panel should look like this:

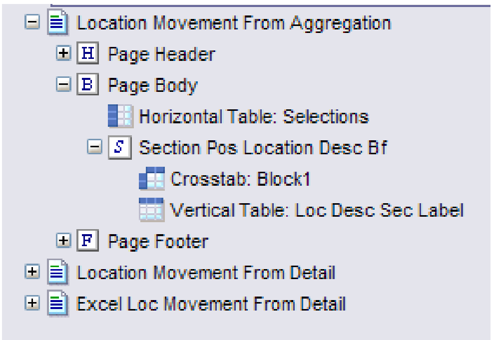


- Notice in the workspace panel, there is 1 query that is used to make this report and there are 3 tabs that correspond with the Report Tab names.

- In the Report Panel, when you click on a report tab name, ALDER automatically expands the outline of the report page.
- Click on **Location Movement from Aggregation** if there is a "+" click on it
- Click on the "+" next to report name **Page Body**.

- Click on the "+" next to Section Location Desc Bf

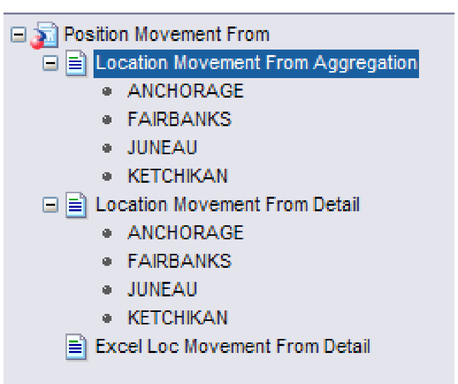
- Your Report Panel should look like this:



- As we click on each item within the outline, ALDER takes us to that item within the workspace panel.
- Click on the "+" next to Page Header under Location Movement From Detail and click on Cell: =DocumentName() and see where it takes you.
- Click on Crosstab: Block 1 in the Page Body under Location Movement From Aggregation and Section Pos Location Desc Bf
- This is how you can locate each item within your report.
- If we had charts in this report the chart name will show up in our outline.
- We will go over this again during the formatting portion of training. At that time, we will be renaming the charts and tables so that the names make more sense.
- We will be back into this menu item during the filter and section portions of the training.

Navigation Map:

- In the Report Panel, select Navigation Map
- The Navigation Map is a way to quickly find data within your report.
- Expand the Location Movement From Aggregation report
- Expand Location Movement From Detail
- Your Report Panel should look like this



- Now click on Ketchikan under Location Movement From Detail
- You have now navigated to the data for positions that have moved out of Ketchikan

- Click on Fairbanks under Location Movement From Aggregation
- You have now navigated to the first tab of the report and you should see the counts of positions that moved from Fairbanks.

User Prompt Input:

- In the Report Panel, select User Prompt Input
- This is a second way to refresh your data.
- You can type in your new prompt and click the Run button

OR

- You can click the advanced button 

in the top left corner of the Report Panel. It is the same as the Refresh Data button

Find:

- In the Report Panel, select Find
- This has the same functionality as the Find button on the workspace panel toolbar
- Using the Navigation Map is often an easier way to find data within your report

Summary:

After completing this chapter, you are now able to:

- Identify the Report Panel
- Move between the Report Panel menu items
- Identify and Define Available Objects
- Add or Remove Available Objects
- Add Charts, Tables, and Cells
  - To the Report
  - To Sections
- Use the Navigation Map to find information within the Report
- Identify the report outline using Document Structures and Filters
- Input Data into User Prompt

CHAPTER 6

Using Dates in ALDER

Goals and Objectives

Report Effective Date and Point in Time Date

Report Date Ranges

Change View Date Range

Goals and Objectives:

After you complete this chapter, you will be able to:

- Use correct dates on a report
- Understand Report Effective Dates
- Understand Point in Time Dates

Introduction to Dates in ALDER:

- ALDER uses several date fields
  - Dates as prompts
    1. Report Effective Date; this is the date is when ALDER received the data from AKPAY. We also call it the snapshot date. These downloads began April 20, 2008 and continue to be received daily at the end of the day. This means that any Report Effective Date before April 20, 2008 will bring back nothing because ALDER was "empty" until then. If there are multiple actions on a field in AKPAY ALDER will only know about the final action.
    2. Report Point in Time Date; this date is when data was effective in AKPAY on the selected date. This date must be on or before the Report Effective Date. The PIT date will include any reversals or changes to the data that were effective up to that date. To see what AKPAY looked like on a given day the Report Effective Date must be after 4/19/2008 and the PIT date must be the same as the Report Effective Date.

ALDER	AKPAY
Report Effective Date	Download Date
Point in Time Date	AKPAY Effective Date

    3. Report Range Begin Date and Report Range End Date; when looking at a report that uses a date range rather than a single date the prompt will ask for beginning and ending effective dates to pull the data. This type of dating is generally used for data that is accumulated such as earnings, deductions, gross pay and taxes.
    4. Change Date Range Begin and End; change reporting must use a date range not a single day. This type of dating is used when we are looking for changes over time like the movement reports or changes for bargaining unit seniority.
  - Dates with List of Values; when a list of values is available the list will be current as of the date entered. This is an optional field and like the report effective date cannot be before 4/20/2008.
  - Dates as data; these dates will be an available object on your report. Examples of this kind of date are birth date, merit anniversary date or separation date.

Report Effective Dates and Point in Time Dates

- Copy **Employee Counts by Location, Department or Sex** from *Enterprise/Payroll/Employee Demographics* into your *Class ALDER 101* folder
- Open the report from your *Class ALDER 101* folder

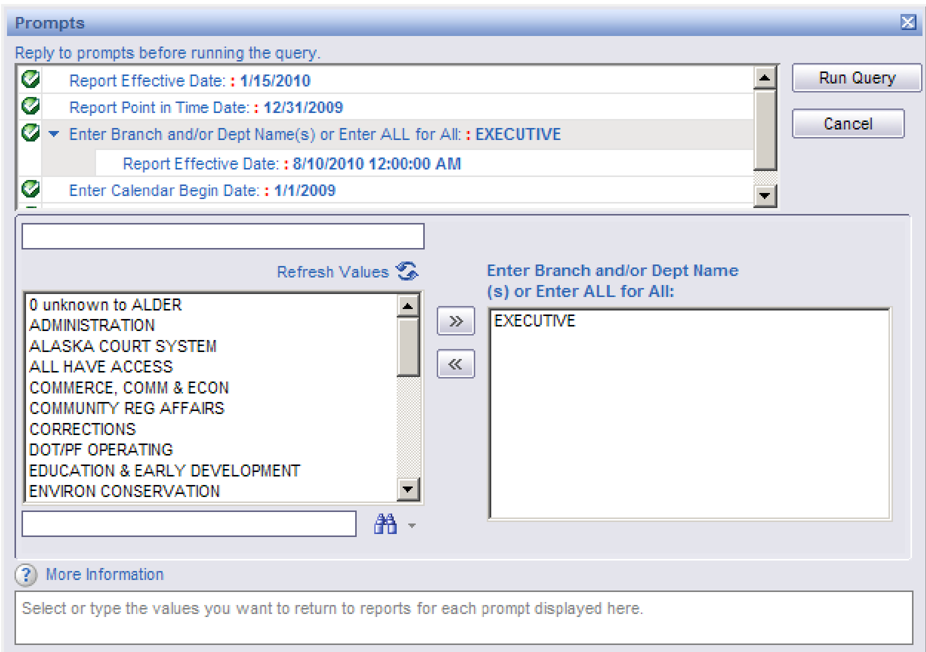
This is a straightforward report that will look at data from a single day. We want to look at employee counts at the end of the calendar year.

Report Effective Date: 1/14/2010 This date is the date that ALDER received the data. It is also called the Snapshot date. Using 1/14/2010 will allow payroll to have run and most reversals to have processed.

Note: ALDER started receiving data on April 20, 2008. If a Report Effective date is entered before that date ALDER had no data so the report will return without any information.

Report Point in Time Date: The Point in Time date uses the effective date from the AKPAY screens to pull data back. In this report we will use 12/31/2009

Branch and/or Dept Name: We will need to look at the List of Values to know how to put the prompt in correctly. Click on Report Effective Date just below this prompt and enter TODAY by clicking on the calendar next to the prompt entry cell. [We can use TODAY this because we know that there have been no changes to Branches or Departments from the time we need our data up to now.] Now click on the prompt for Branch and/or Dept Name. In a few microseconds the box on the left will be filled with the List Of Values for this field. Make sure "EXECUTIVE" is entered for the prompt.



Calendar Year Begin Date: 1/1/2009 This prompt is on this report because the second tab is reporting on the number of New Hires that starting within the calendar year.

Calendar Year End Date: 12/31/2009 This prompt is on this report because the second tab is reporting on the number of New Hires that starting within the calendar year

Report Range Dates

- Find **Earnings Code Report by RD Department** from *Enterprise/Payroll/Employee/Pay* and save in *Class ALDER 101* in your favorites.
- Open the report from your *Class ALDER 101* folder.
- We want a report that gives us 110 pay for department 12 for calendar year 2009 and we want to make sure that payroll had processed for the calendar year end. We also want to include any and all reversals or adjustments that have occurred.

  Report Effective Date: **Today** will give us any adjustments or reversals that have occurred to this data up to current as long as the effective dates of these fields are in our date range.

Report Point in Time Date: **1/1/2010** This date can be anytime after 12/31/2009 because the data is for the full calendar year; however, the further away from the date range you look, the more likely other conditions will affect the data. In this example someone might have left department 12 to another department and the data will not be returned for that employee if the Report PIT is after that date.

Report Range Date Begin: **1/1/2009** We are asking for data that was effective in calendar year 2009. This is the first day of the year

Report Range Date End: **12/31/2009** We are asking for data that was effective in calendar year 2009. This is the last day of the year

RD Dept Num: 12 We could use the List Of Values if we were not sure of the formatting required.

Earnings Num: 110 We could use the List Of Values if we didn't know the Earnings Number.

PCN: ALL

To save time here is a copy of the beginning of the report that was run on August 6, 2010

Report Effective Date	8/6/2010
Report Point in Time Date	1/1/2010
Report Range Dates	1/1/2009 - 12/31/2009
Earnings Num(s)	110
RD Department(s)	12
PCN(s)	ALL

Earnings Num Description: 110 SEADUTY - 7.5 HR. EE

EE Name	EE PCN	EE Org Code	EE QT1 Earnings Hrs	EE QT1 Earnings Amt	EE QT2 Earnings Hrs	EE QT2 Earnings Amt	EE QT3 Earnings Hrs	EE QT3 Earnings Amt	EE QT4 Earnings Hrs	EE QT4 Earnings Amt	EE Total Hrs	EE Total Amt
ANTHONY,THOMAS N	121920	99999999	237.78	1,602.40	-10.25	-69.08	0.00	0.00	0.00	0.00	227.53	1,533.32
BEAR,STEVE H	121087	12012002	0.00	0.00	0.00	0.00	227.53	4,304.09	0.00	0.00	227.53	4,304.09
BOOTH,DALE A	121429	12012401	61.50	583.48	360.78	3,422.90	774.84	7,514.28	299.28	2,924.87	1,496.4	14,445.5
BOTTS,BENJAMIN	121940	99999999	0.00	0.00	0.00	0.00	20.50	133.07	0.00	0.00	20.5	133.07
CAMPBELL,DOUGLAS A	123167	12012401	305.42	2,791.57	560.63	5,124.22	927.55	8,994.12	278.78	2,724.52	2,072.38	19,634.4
CROFTS,JOHN P	123133	12011401	0.00	0.00	299.28	2,083.77	927.55	6,600.72	591.38	4,306.93	1,818.21	12,991.4
ELLIS,WILLARD S	123077	12011401	193.71	3,734.91	0.00	0.00	152.71	3,032.73	0.00	0.00	346.42	6,767.64

- Save in your *Class Exercise* folder and call it **Earnings Code Report by RD Dept Dates V.1**

- Now we want to look at the same data at a different point in time. We will look at data only through the payroll third quarter end of 2009. In this case if we do not want to include any Quarter 4 data we will also need to choose the Report Effective date back in time when the fourth quarter bucket had not been filled.

Report Effective Date: **9/22/2009** In this case we choose the date when ALDER receives the payroll after it has processed. We could choose any time between 9/22/2009 and 10/6/2009 (the day before the next payroll run); that will work if you don't have to worry about when Biweekly runs or quarter or year end processing. And we have to balance getting all the reversals and adjustments with losing lines of data if someone's transfer is processed between the payroll run and the Report Effective Date

Report Point in Time: **9/15/2009** This is the effective date of the quarter three end. We could actually use any date until we know that the accumulators are adjusted to a payroll run.

Report Range Begin Date: **1/1/2009**

Report Range End Date: **9/15/2009** This date could be any time in the future for this particular report because the snapshot date set by the Report Effective Date will only see what was in AKPAY on that date.

Department: 12

Earnings Num: 110

PCN: ALL

Also notice that David Craig has been added to the list. He transferred from Dept 12 to Dept 6 effective 10/1/2009 but that action did not occur in AKPAY until 11/5/2009.

Earnings Num Description: 110 SEADUTY - 7.5 HR. EE

EE Name	EE PCN	EE Org Code	EE QT1 Earnings Hrs	EE QT1 Earning s Amt	EE QT2 Earnings Hrs	EE QT2 Earnings Amt	EE QT3 Earnings Hrs	EE QT3 Earnings Amt	EE QT4 Earnings Hrs	EE QT4 Earnings Amt	EE Total Hrs	EE Total Amt
ANTHONY,THOMAS N	121920	99999999	237.78	1,602.40	-10.25	-69.08	0.00	0.00	0.00	0.00	227.53	1,533.32
BEAR,STEVE H	121087	12012002	0.00	0.00	0.00	0.00	227.53	4,304.09	0.00	0.00	227.53	4,304.09
BOOTH,DALE A	121429	12012401	61.50	583.48	360.78	3,422.90	774.84	7,514.28	0.00	0.00	1,197.12	11,520.6
BOTTS,BENJAMIN	121940	99999999	0.00	0.00	0.00	0.00	20.50	133.07	0.00	0.00	20.5	133.07
CAMPBELL,DOUGLAS A	123167	12012401	305.42	2,791.57	560.63	5,124.22	927.55	8,994.12	0.00	0.00	1,793.6	16,909.9
CRAIG,DAVID R	123819	12011501	0.00	0.00	82.00	423.68	177.32	943.64	0.00	0.00	259.32	1,367.32
CROFTS,JOHN P	123133	12011401	0.00	0.00	299.28	2,083.77	927.55	6,600.72	0.00	0.00	1,226.83	8,684.49
ELLIS,WILLARD S	123077	12011401	193.71	3,734.91	0.00	0.00	152.71	3,032.73	0.00	0.00	346.42	6,767.64
ENSIGN,NEIL E	123155	12011401	526.81	5,824.52	856.84	9,473.39	890.66	10,404.51	0.00	0.00	2,274.31	25,702.4
FORST,BRANDEN E	123851	12011002	0.00	0.00	85.07	426.38	129.14	647.26	0.00	0.00	214.21	1,073.64
FOX,DANIEL C	121921	12012002	0.00	0.00	108.64	802.75	720.52	5,419.00	0.00	0.00	829.16	6,221.75
HAGUE,WILLIAM O	121941	12012002	0.00	0.00	197.82	1,303.16	105.57	710.13	0.00	0.00	303.39	2,013.29
HANSON,MICHAEL J,,JR	123831	12011501	0.00	0.00	268.53	1,493.70	434.56	2,467.66	0.00	0.00	703.09	3,961.36

- Save in your *Class Exercise* folder and call it **Earnings Code Report by RD Dept Dates V.2**

Change View Date Range

- Open **Position Movement From** for you *Class ALDER 101* folder.

We want to look at Classified and Partially Exempt positions that have moved from Fairbanks in Calendar Year 2009.

Change Views is a way that ALDER looks for changes that have occurred to AKPAY data. In the case of this report it is looking at the location code field on the 62 screen in AKPAY. When that change happens ALDER will take the date of the change and use it for reports like this. We are also able to count these changes. Another report that uses Change Views is the Employee Movement Outgoing and Incoming reports. These reports watch the PCN on the 10P screen and gathers data for us to use. We are able to put formulas in to differentiate the types of movement such as transfers or promotions within the department.

Location Code: **JBA** This is the prompt that will show in the Selections box

Report Effective Date: **7/1/2010** This is the same as the previous report; the snapshot date or the date the data was received by ALDER.

Position Work Type Group (After): **Classified;Partially Exempt**

Change Date Range Begin**: 1/1/2009** This is different from the example above. This is asking for dates that changes occurred. This is the beginning of the date range that will be looked for the changes. ALDER will pick up any location changes between the begin and end date inclusively.

Change Date Range End: **12/31/2009** This is the end of the date range that ALDER will look for the changes.

Position Location changed from: **JBA** This is the code that will be filtered in the report. It should match the

This report has two tabs. The first is the counts by location in pivot or crosstab format.

Report Effective Date	8/6/2010
Report Date Range	1/1/2009 - 12/31/2009
Location Code "From"	JBA
Position Work Type Group(s)	Classified;Partially Exempt

From: FAIRBANKS

	ANCHORAG	ANIAK	ANVIK	BIRCH LAKE	DILLINGHAM	EAGLE	EMMONAK	FORT YUKO	JUNEAU	NOME	F
DOT/PF OPERATING	2			1					1	3	
ENVIRON CONSERVATION									1		
FISH AND GAME	2	1	1		1	1	2	2			
HEALTH/SOCIAL SERVICES	1										
LAW	2										
STATEWIDE	7	1	1	1	1	1	2	2	2	3	

The second tab is the detail of positions that have moved from Fairbanks sorted by location.

Location to:	Pos Dept Full Desc Af	PCN	Pos Job Class Af	Pos Job Class Desc Af	Range
ANIAK	FISH AND GAME	111317	P6161	FISHERY BIOLOGIST II	16
	TOTAL COUNT:	1			

Location to:	Pos Dept Full Desc Af	PCN	Pos Job Class Af	Pos Job Class Desc Af	Range
ANVIK	FISH AND GAME	111641	P6160	FISHERY BIOLOGIST I	14
	TOTAL COUNT:	1			

Location to:	Pos Dept Full Desc Af	PCN	Pos Job Class Af	Pos Job Class Desc Af	Range
BIRCH LAKE	DOT/PF OPERATING	253522	P9511	EQUIP OPERATOR (F/LJ/J/SJ)	53
	TOTAL COUNT:	1			

Location to:	Pos Dept Full Desc Af	PCN	Pos Job Class Af	Pos Job Class Desc Af	Range
DILLINGHAM	FISH AND GAME	111606	P6113	F&W TECHNICIAN II	09

- Save it in *Class Exercises* and call it **Position Movement From Dates**

CHAPTER 7

Report and Table Filters

Goals and Objectives:

After you complete this chapter, you will be able to:

- Place a Filter on a Report
- Place a Filter on a Table
- Place a Filter on a Chart
- Know the affects of Filters on calculations within the report
- Know how to find Filters within the Document Structure and Filters menu
- Know how to remove Filters
- Know how to nest a filter

Introduction to Filters:

- In ALDER, there are 3 different types of filters:
  1. Query Filters

     Allow the user to limit the amount of data retrieved from the data warehouse. These types of filters are built by report developers.
  2. Report Filters

     Allow the user to restrict the data displayed on the entire report. These types of filters are applied to all tables and charts within a report.
  3. Table/Chart Filters

     Allow the user to limit the data displayed on individual tables or charts.

- Filters are defined on dimensions, measures, details and variables that are listed within the Available Objects menu in the Report Panel.

Scenario:

You have been asked to create a report of employees who had worked as an Office Assistant I for the Public Protection Service Center in positions other than Anchorage, Fairbanks and Juneau and graph the number of days in the job class for fiscal year 2010 by location. You know of an existing Enterprise Report that will work, but it will need to have filters applied to it.

Creating Report Filters:

- In your Inbox, find **Employees in a Given Job Class and Location Revised** and copy to *CLASS ALDER 101*
- Open the report from your *CLASS ALDER 101* folder
- Maximize your real estate

- Refresh Data
    - Report Effective Date: 8/2/2010
    - Change Date Range Begin: 7/1/2009
    - Change Date Range End: 6/30/2010
    - Job Class Code: P1134
    - Location: ALL
    - Org Code: ALL
- Before passing this report on, you see that all departments are included in this report. The first few rows and columns of the report should look similar to:

EE ID	Employee Name	PCN	Job Class	Job Class Desc	Range	Job Class Start Date	Job Class End Date	Region	Div	Sect	RD Code	Lo
102627	ERICKSON,LINDA A	027593	P1134	OFFICE ASSISTANT I	08	09/02/2009	03/15/2010	02	08	50	06550	EB
102627	ERICKSON,LINDA A	027593	P1134	OFFICE ASSISTANT I	08	03/16/2010	12/31/2499	02	08	50	06550	EB
107268	MIECZYNSKI,KAREN J	04N1000	P1134	OFFICE ASSISTANT I	08	04/05/2010	12/31/2499	30	05	02	04305	EB
120747	STEWART,CYNTHIA A	077005	P1134	OFFICE ASSISTANT I	08	10/29/2009	04/30/2010	20	03	31	07934	EB
120747	STEWART,CYNTHIA A	077005	P1134	OFFICE ASSISTANT I	08	05/01/2010	06/15/2010	20	03	31	07934	EB
137882	SCHEEL,DIANNA M	08N0802	P1134	OFFICE ASSISTANT I	08	07/01/2009	04/19/2010	01	40	01	08401	AW
137882	SCHEEL,DIANNA M	08N0802	P1134	OFFICE ASSISTANT I	08	04/20/2010	04/20/2010	01	40	01	08401	AW
148393	GRUBER,JAMES D	043084	P1134	OFFICE ASSISTANT I	08	07/01/2009	12/31/2499	01	05	09	04015	AW
153420	ASK,JOHANNE SANDRA	063011	P1134	OFFICE ASSISTANT I	08	07/01/2009	12/30/2009	01	03	01	06301	AW
153420	ASK,JOHANNE SANDRA	063011	P1134	OFFICE ASSISTANT I	08	12/31/2009	12/31/2009	01	03	01	06301	AW
159850	LOWN,JODY A	03N1000	P1134	OFFICE ASSISTANT I	08	12/02/2009	02/19/2010	40	65	62	03406	JB
182152	DONNELLY,BERNICE M	051703	P1134	OFFICE ASSISTANT I	08	07/01/2009	12/31/2499	00	02	03	05021	AW
187700	HAMEL,LINDA M	06N0910	P1134	OFFICE ASSISTANT I	08	09/17/2009	01/14/2010	02	04	11	06453	EB
190108	BENNETT,JANICE A	046083	P1134	OFFICE ASSISTANT I	08	07/01/2009	07/16/2009	01	06	06	04016	AW

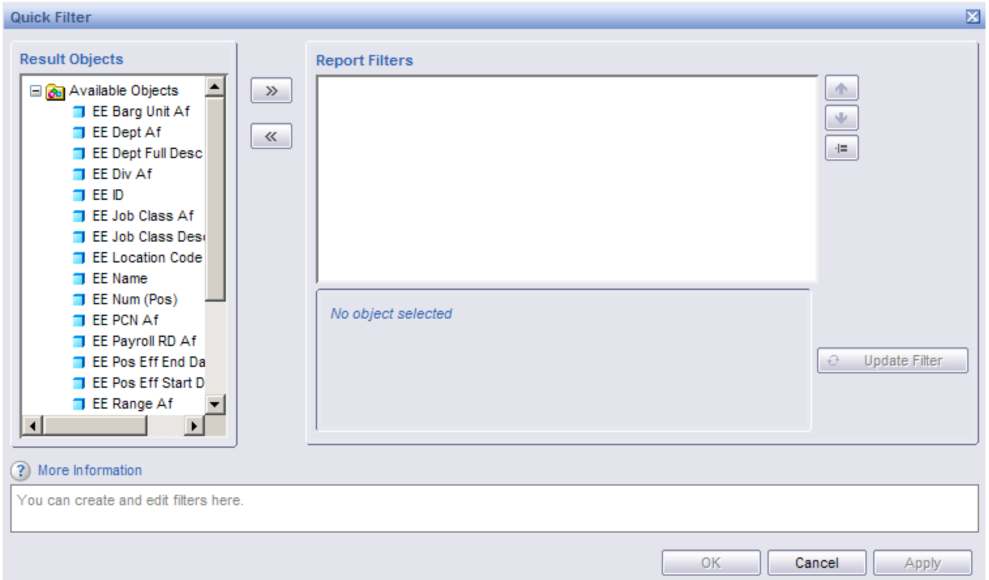
- You will want to apply a filter to the entire report to limit the data to show only Public Protection Departments.
- In the Document Structure and Filters menu, Click on the report name **EEs in JC and Location**.
- Verify that the background behind the Selections Box is still gray.

Employees in a Given Job Class a

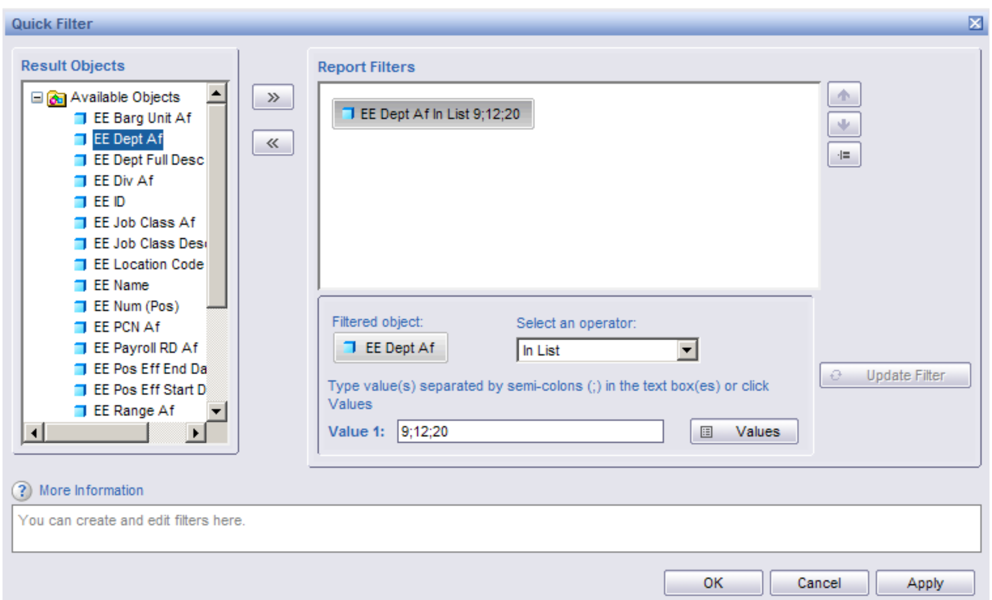
Report Effective Date	8/2/2010
Report Date Range	7/1/2009 - 6/30/2010
Org Code(s)	ALL
Job Class Code(s)	P1134
Location Code(s)	ALL

- You can apply a filter to the report 4 different ways.
    1. Click the Filter button on the Workspace Panel toolbar
    2. Click the Filter button in the Report Panel
    3. Right click on the Report Name **EEs in JC and Location** in the Report Panel
    4. Right click next to the Selections Box
        - This method will highlight Page Body in the Document Structure and Filters menu, but will apply the filter to the entire report.

- Once you have selected a method for applying a filter, the Quick Filter box will pop-up on your screen.



- Select the Result Object EE Dept Af and place it in the Report Filters panel
- Select the operator **In List**
- Click the Values button and Select 9, 12 and 20 or type into the Value 1 box
- If you typed the value into the box, you will need to click the Update Filter button
- Your Quick Filter box should now look like this:



- Click OK and verify that your first page now displays Military and Veterans' Affairs and Public Safety.
- Look at your Document Structure and Filters menu and verify that the filter was applied directly under the report name **EEs in JC and Location**.
- Update the Selections Box to let the end user know that a filter has been placed on this report
- Click on the last row in the Selections Box
- Right Click and Select Insert, New Row, Below
- In blank Blue Cell, type in Report Filtered By
- In blank Gray Cell, type in Dept=9;12; 20

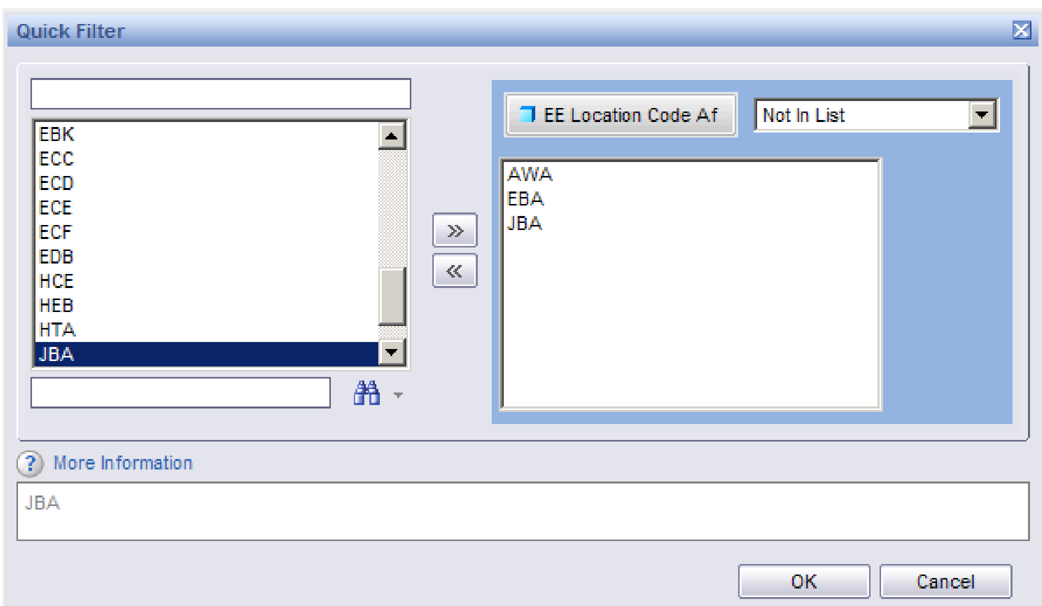
- Your Selections Box should now look like:

Report Effective Date	8/2/2010
Report Date Range	7/1/2009 - 6/30/2010
Org Code(s)	ALL
Job Class Code(s)	P1134
Location Code(s)	ALL
Report Filtered By	Dept = 9;12; 20

- Save your report as **Employees in a Given Job Class & Location Report Filter** in your *Class Exercises* folder.

Creating Table Filters:

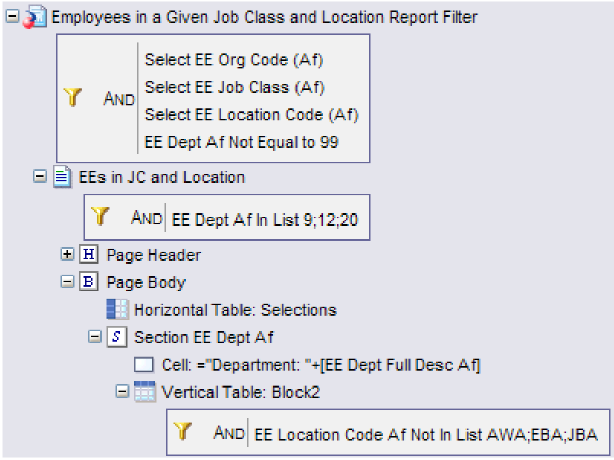
- Continue using **Employees in a Given Job Class & Location Report Filter**
- You will now want to apply a filter to the table data to filter out the locations Anchorage, Fairbanks and Juneau.
- Click on the column called Loc, then click on the Filter button
- In the Quick Filter pop-up, select AWA (Juneau), EBA(Anchorage) and JBA(Fairbanks) from the down arrow on the right choose **Not in List**



- Click OK
- Scroll through the report and verify that you do not see any of the codes you eliminated

If there is a data table that is not connected to the report total table or section total tables, you will need to find those tables and apply the same filter to them. This is typical of financial reports.

- Once you are done, your Document Structure and Filters should look like this:



- Update your Selections Box to look like this:

Report Effective Date	8/2/2010
Report Date Range	7/1/2009 - 6/30/2010
Org Code(s)	ALL
Job Class Code(s)	P1134
Location Code(s)	ALL
Report Filtered by	Dept = 9;12;20
Table filtered by	Loc <> AWA;EBA;JBA

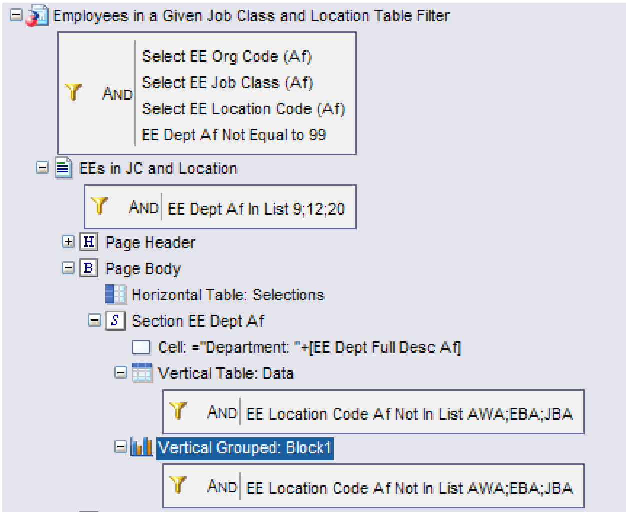
Save your report as **Employees in a Given Job Class and Location Table Filter** in your *Class Exercises* folder.

Creating Report/Chart Filters:

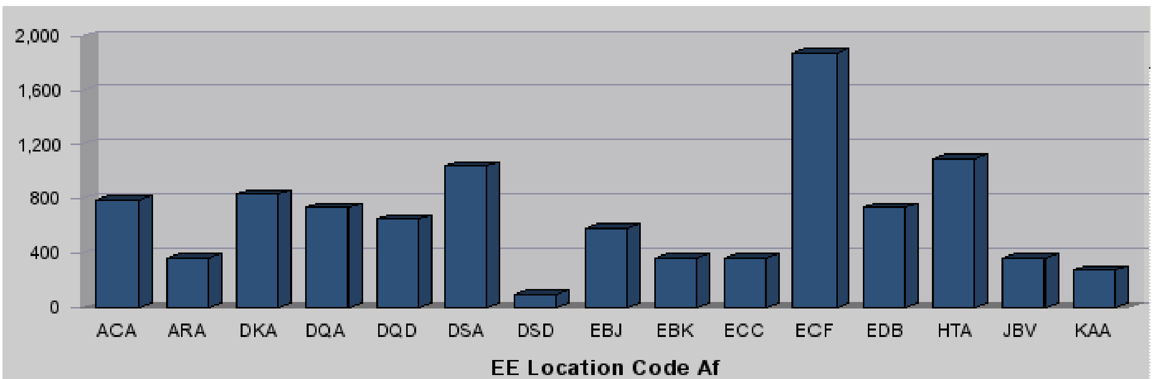
Note: Based on your scenario, you did not want to apply this filter to the entire report. You still need to display a chart that shows counts of positions in locations other than Juneau, Anchorage or Fairbanks,

- Go to Chart and Table Types in the Report Panel
- Drag a Vertical Grouped Bar Chart onto the report next to the Vertical Table: Data
  - X-Axis = EE Location Code Af
  - Y-Axis = Sum(Time in Job Class)
- Click OK
- Notice that the charts have not been filtered by the Table Filter
- Right click on the chart and select Quick Filter
- When the Quick Filter box pops-up, select Location Code Af
- Select the operator **Not in List**
- Type in the Values of AWA;EBA;JBA
- Click Update Filter
- Click OK
- Review your chart, notice the chart in the Public Safety Section not longer includes the locations that were excluded
- Go to Document Structure and Filters in the Report Panel

- Review the Document Structure and Filters; it should look like:



- Your location chart for Public Safety should look like this. You might have to expand the side a bit.



- You have now completed a report with charts for the requested scenario
- Update your Selections Box to look like this:

Report Effective Date	6/30/2010
Report Date Range	7/1/2009 - 6/30/2010
Org Code(s)	ALL
Job Class Code(s)	P1134
Location Code(s)	ALL
Report Filtered by	Dept=9;12;20
Table Filtered by	Loc <>AWA;EBA;JBA
Location Chart Filtered by	Loc <>AWA;EBA;JBA

- Save your document again in you *Class Exercises* folder as **Employees in a Given Job Class and Location Table & Chart Filters**

Nested Filters:

The purpose of a Nested Filter is to limit or define the data being displayed on a report based on multiple sets of criteria.

- Continue to use **Employees in a Given Job Class and Location Table & Chart Filter**

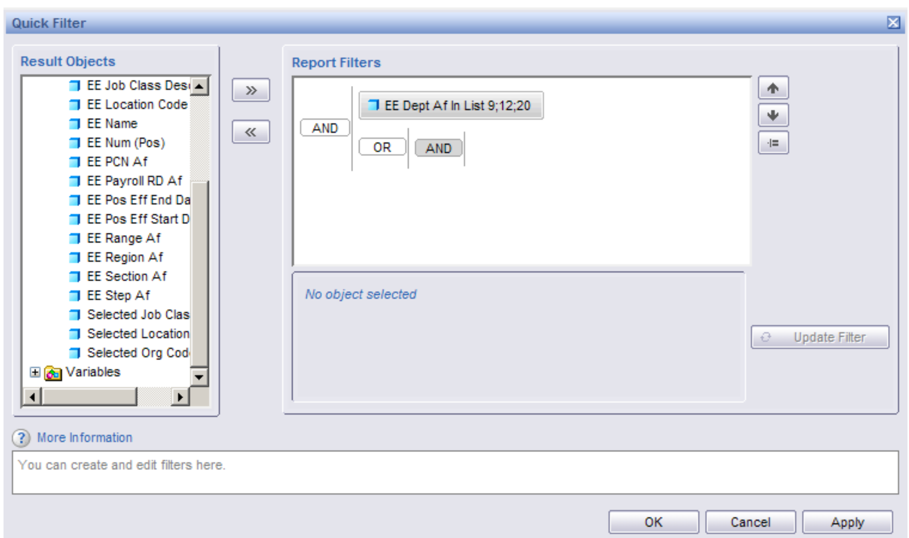
Scenario:

Another manager found out about the report you created with Job Class and Location for the Public Protection group and has asked to look at the same data but wants it for only employees with more than 200 days of service unless the employee is in step A, in that case show the data if they have more than 100 days of service.

- Right -click next to your Selections Box
- Select Quick Filter. Notice that there is already a report filter for departments 9, 12 and 20.

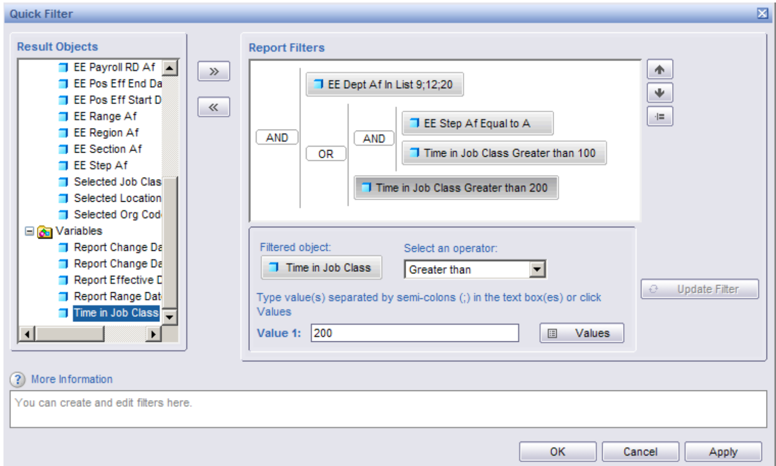
- The data is set up to be all employees with A Step over 100 hours or all employees over 200 hours. These are the two parts of our filter. You will probably need to play around with nesting filters to get the results you want. Don't get discouraged. It took a while for the ALDER Team to get this to work but this is what we finally came up with.

- First we will create a filter for Employees in Step A over 100 days by clicking on the Nested Filter button to the right of your Report Filters panel . You will see another level of filtering that says OR click again and you will get another level that says AND. Make sure that AND is gray.



- Select the object **EE Step Af**, the operator will be **Equal to**. From the Values list choose **A.** This should be in the last AND level
- Select the variable **Time in Class** the operator will be **Greater than** and type **100** in the Value 1 b**o**x. Click on Update Filter. This also should be in the last AND level
- Click on the "OR" level and **Time in Job Class**, the operator will be Greater than and type 200 in the Value 1 box. Click on Update Filter
- You can change ANDs and ORs by double clicking on them.

- Your Quick Filter box should look like:



- You can also see your nested filter in the Report Panel under Document Structure and Filters.
- Add a row to your Selections Box to include another Report filter, it should look similar to this:

Report Effective Date	6/30/2010
Report Date Range	7/1/2009 - 6/30/2010
Org Code(s)	ALL
Job Class Code(s)	P1134
Location Code(s)	ALL
Report Filtered by	Dept=9;12;20
Report Fitlered by	Time in Job Class>200; If Step A >100
Table Filtered by	Loc <>AWA;EBA;JBA
Location Chart Filtered by	Loc <>AWA;EBA;JBA

You may need to wrap text (Ch 8 p. 58) or extend the table.

- The beginning of the report should look like this:

Department: MILITARY VETS AFFAIRS

EE ID	Employee Name	PCN	Job Class	Job Class Desc	Range	Job Class Start Date	Job Class End Date	Region	Div	Sect	RD Code
311195	BIRCH,MELVIN D	090212	P1134	OFFICE ASSISTANT I	08	07/01/2009	03/31/2010	50	00	03	09301
311207	JONES,ALYSSIA M	090354	P1134	OFFICE ASSISTANT I	08	09/23/2009	12/31/2499	65	00	01	09500
311830	MCINTYRE,HOPEMARIE A	090357	P1134	OFFICE ASSISTANT I	08	07/01/2009	06/15/2010	60	00	01	09500
313750	DELONG,BARBARA K	090059	P1134	OFFICE ASSISTANT I	08	08/24/2009	02/28/2010	10	00	01	09201
313766	WRIGHT,MELANIE M	090154	P1134	OFFICE ASSISTANT I	08	08/19/2009	02/28/2010	15	00	02	09201

- Save this report as **Employees in a Given Job Class and Location Nested Filters** in your *Class Exercises* folder
- **SEE APPENDIX for definitions of OPERATORS and additional examples of Nested Filters**

Deleting Filters:

- Go to Document Structure and Filters in the Report Panel
- Click on the nested report filter (the filter should be blue with a red boarder)
- There are 3 ways to remove a filter
    - Right Click on the filter and Select Remove Filter
    - Select the Remove button in the Report Panel
    - Press the delete button on your keyboard
- Click Yes
- Review the effects on data table within the report.
- Do not save the report with the report filter removed

Summary:

After completing this chapter, you are now able to:

- Place a Filter on a Report
- Place a Filter on a Table
- Place a Filter on a Chart
- Know the affects of Filters on calculations within the report
- Know how to find Filters within the Document Structure and Filters menu
- Know how to remove Filters
- Know how to nest a filter

Review:

1. How are Filters defined?

2. Why would you apply a filter to a table or chart instead of the entire report?

3. What are the different types of filters?

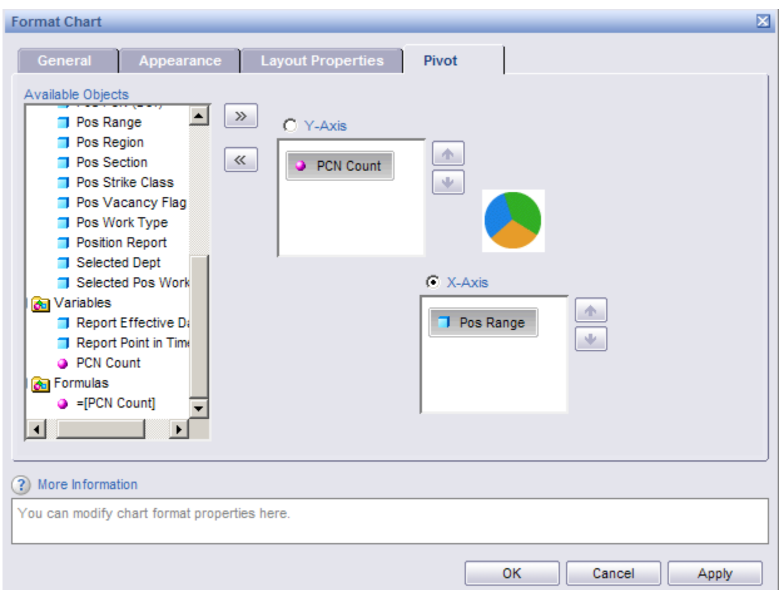
Exercise:

You work for the Department of Labor. The management team would like to compare classified employees in Anchorage and Juneau in A step. You decide to use charts for comparison and to show detail.

1. From your Inbox find **Positions by Position Work Type Revised** and copy it to your *Class ALDER 101* folder.
2. Open the report from your *Class ALDER 101* folder.
3. Refresh Data:
   - Report Effective Date: 6/30/2010
   - Report Point in Time Date: 6/30/2010
   - Dept Num: 7
   - Position Work Type: FACL;SACL;PACL
4. Create a report filter for employees in Step A. Add a row to your Selections Box

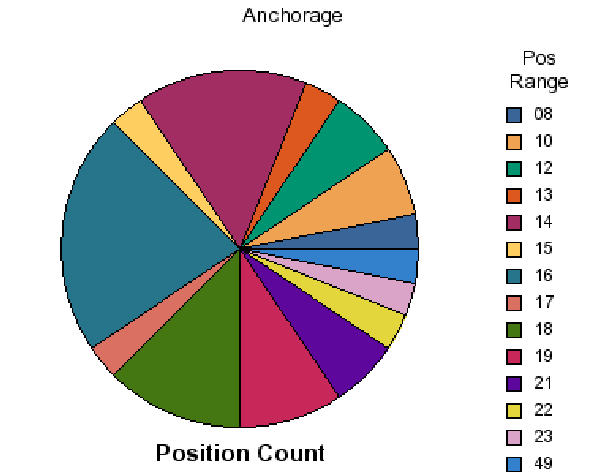
Report Filtered by	Step = A

5. You want the table to include both Juneau (AWA) and Anchorage (EBA) employees so create a table filter on the **Pos Location** Column.
6. Place a pie chart to the right of the data table and graph by **Range** and **Position Count**. Make it large enough to see all the ranges (about 4 by 3)

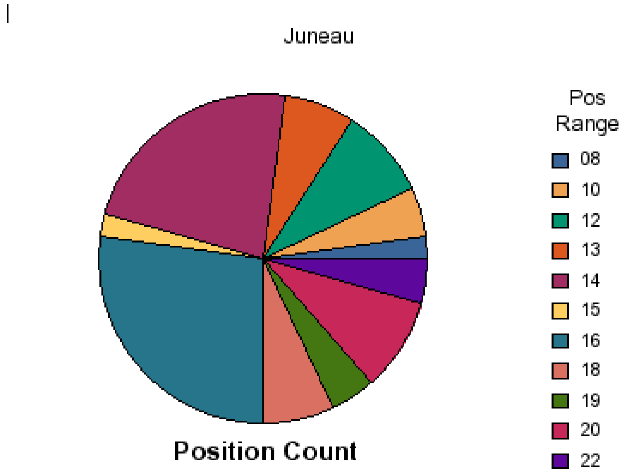


7. Copy the chart and place it below the first pie chart. To do this make sure you have selected the pie chart so that the background is gray. Copy (Crtl + C). Move your cursor below the pie chart and paste (Ctrl + V).
8. In the top chart, filter to show Anchorage (EBA) data only. Name and show the chart title “Anchorage”.
9. Add a row to the Selections box. Add information to show that the Charts were filtered by location.

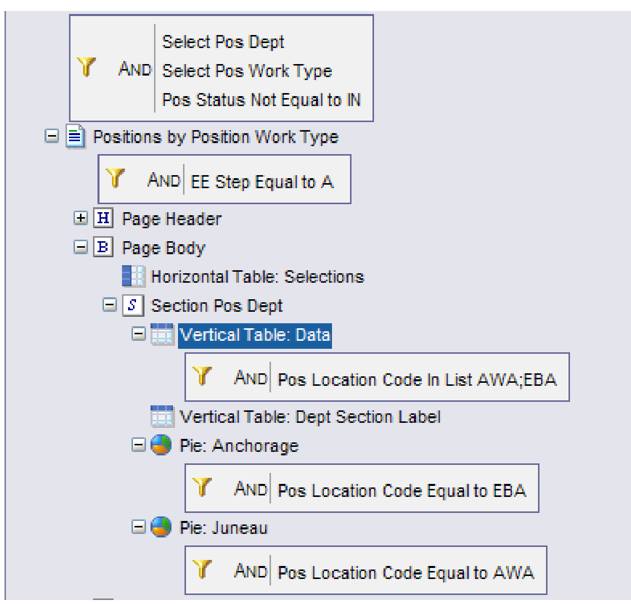
Charts Filtered by	Anchorage Chart: Loc = EBA; Juneau Chart: Loc=AWA



10. In the second chart, filter to show Juneau (AWA) data only. Name and show the Chart Title "Juneau".



11. Your Report Panel under Document Structure and Filters should look like this:



12. Save your report in your Class Exercises folder as **Positions by Position Type Filters Exercise**

CHAPTER 8

Formatting

Goals and Objectives

Cells

All table cells

Table

Report

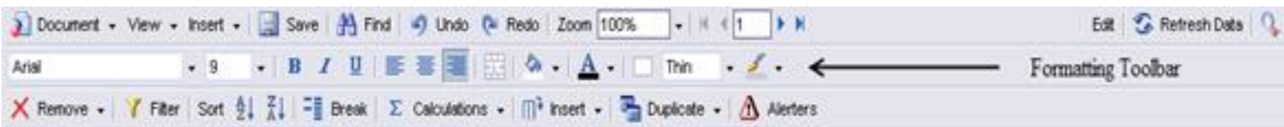
Goals and Objectives:

After you complete this chapter, you will be able to:

- Format Individual Cells or Columns
- Apply consistent formatting to an entire table
- Format a table
- Format the report

Introduction:

- From the *Enterprise/Payroll/Employee/Specialized* folder, copy the report **Employee Directory** to your *Class ALDER 101* folder. Then open the report from your *Class ALDER* folder
- Maximize your real estate.
- Before we begin, verify that your Formatting Toolbar is active.



- If it is not, activate the toolbar by either:
  - Right clicking in the gray area of the toolbars
  - Click the View menu button
- We have already covered formatting a chart in Chapter 5 and Chapter 7.
- See the **Appendix** for formatting a section.
- Enter these parameters before we begin
  - Report Effective Date: Today
  - Report Point in Time Date: Today
  - Address Type: 1(See Special Note below)
  - Department: 5
  - Region: 999
  - Division: 02;03
  - Section: 999
  - Location: ALL

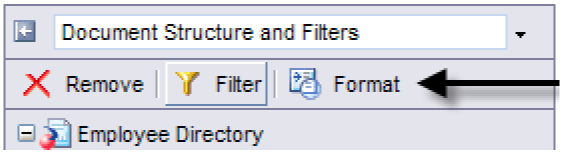
*SPECIAL NOTE: Because of the way address information is put together an address type must be entered every time any address information is used in a report. In this case the address type of 1 (Home Address) is used but home address information is not on this report.

Formatting a Cell:

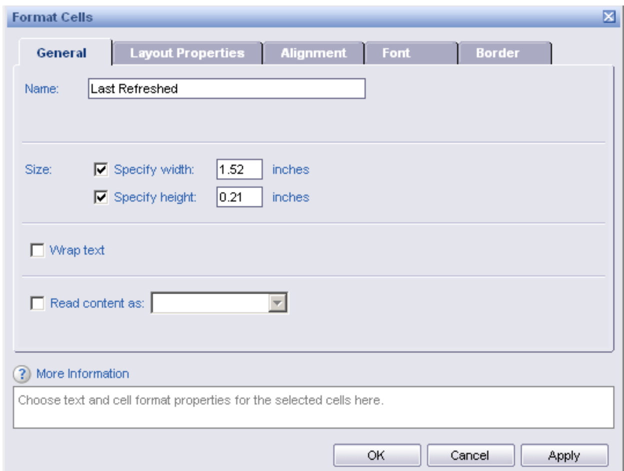
- There are 5 ways to format a cell:

1. Click on the cell in the report and use the formatting toolbar.
2. Right click on the cell and select Format Cell.
3. Right click on the cell in the Report Panel and select Format Cell.
4. Click on the cell in the Report Panel and use the formatting toolbar.

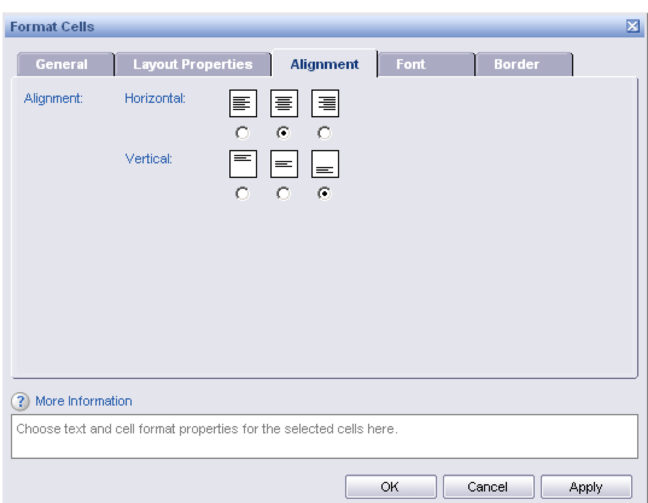
5. Click on the cell in the Report Panel and click on the Format button at the top of the Report Panel.



- In the report header, locate the cell that displays **Last Refreshed**. This cell is located in the Page Header.
- Right Click on the cell and select Format Cell.
- A Format Cells box should pop-up.
- Select the General Tab.



- On the General Tab, you can:
  a. Change the name of the cell (if applicable)
  b. Change the width of the cell (if unchecked, ALDER will try to auto fit the cell to the content)
  c. Change the height of the cell (if unchecked, ALDER will try to auto fit the cell to the content)
  d. Wrap the text within the cell
- **Note**: We will go over the Layout Properties Tab for Cells, Tables, and Charts in Chapter 10. Layout Properties relate to how you position a Cell, Table, or Chart within the report.
- Select the Alignment Tab

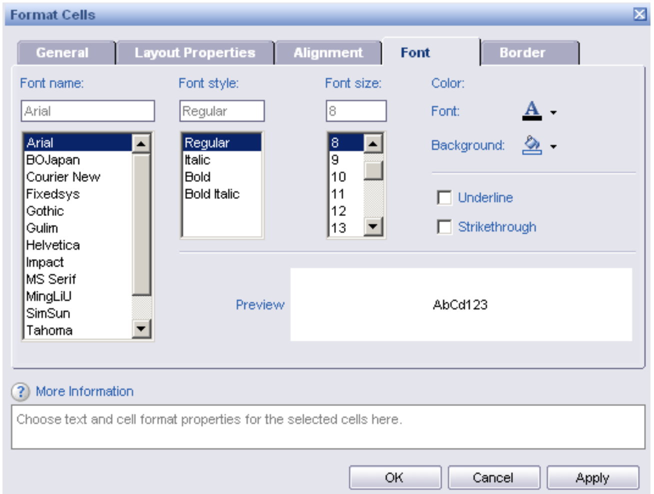


- On the Alignment Tab, you can position the text of the cell by changing the:

a. Horizontal Alignment

b. Vertical Alignment

- Select the Font Tab



- On the Font Tab, you can:

a. Change the Font name: Arial, Times New Roman, Tahoma, etc.

b. Change the Font style: Regular, Italic, Bold, Bold Italic

c. Change the Font size

d. Change the Font Color (click the down arrow next to the color)

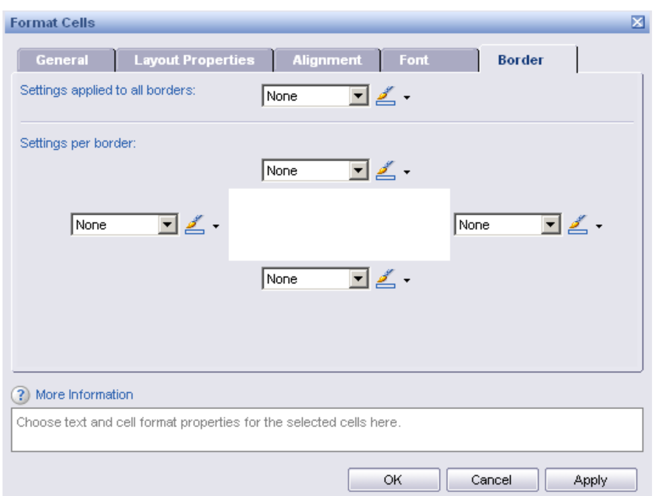
e. Change the Background Color of the cell (click the down arrow next to the fill button)

f. Underline your text

g. Strikethrough your text

h. Preview what the cell will look like

- Select the Border Tab



- On the Border Tab, you can:

a. Change all of the borders at once (includes color)

b. Change one border at a time (includes color)

Note: If you make a change to a tab, you must click **Apply** before moving to another tab. Once you are done making all of your changes, click **OK**.

Formatting a Column:

- There are 2 ways to format a column:
  1. Click on a column in the data table and use the formatting toolbar.
  2. Right click on the column and select Format Cell.
- The formatting options for a column are similar to formatting an individual cell. The differences are:
  a. No Layout Property Tab
  b. If the column has a number or date, there is a tab for formatting the number or date.

Note: If you make a change to a tab, you must click **Apply** before moving to another tab. Once you are done making all of your changes, click **OK**.

Formatting All Table Cells:

- There are 4 ways to format all table cells:
  1. Hover over the table until dotted border and "+" sign appears in the upper left hand corner of the table, Click on the "+" and use the formatting toolbar. (some of the formatting options will be grayed out and unavailable through this method)

  2. Right click on the table and select Format All Table Cells.
  3. Right click on the table in the Report Panel and select Format All Table Cells.
  4. Click on the table in the Report Panel and use the formatting toolbar. (some of the formatting options will be grayed out and unavailable through this method)

- The formatting options for All Table Cells are similar to formatting an individual cell. The differences are:
  a. No Layout Property Tab
  b. Formatting applies to the entire table and will undo or overwrite any formatting applied to individual columns.

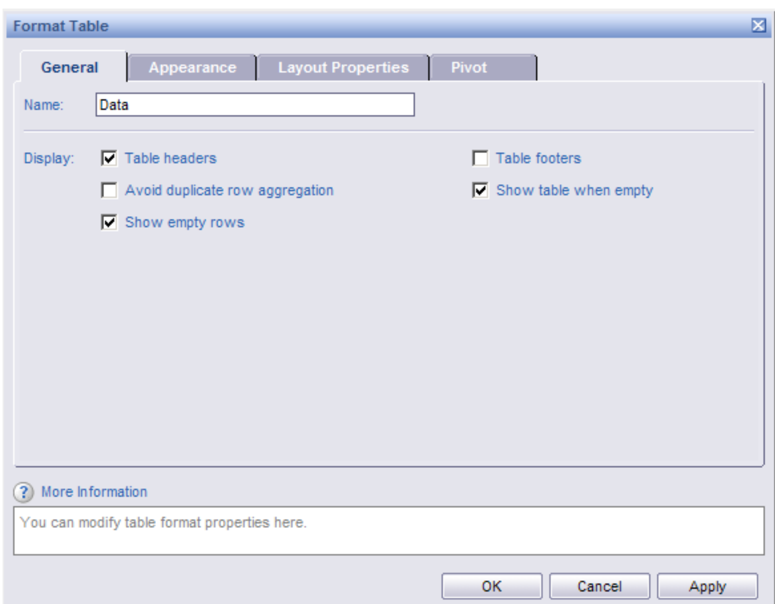
Note: If you make a change to a tab, you must click **Apply** before moving to another tab. Once you are done making all of your changes, click **OK**.

Formatting a Table:

- There are 5 ways to format a table:
  1. Hover over the table until dotted border and "+" sign appears in the upper left hand corner of the table, Click on the "+" and use the formatting toolbar.

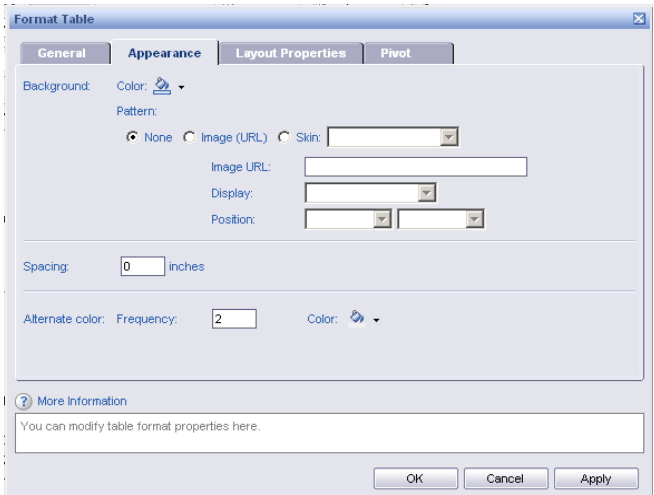
  2. Right click on the table and select Format Table.
  3. Right click on the table in the Report Panel and select Format Table.
  4. Click on the table in the Report Panel and use the formatting toolbar.
  5. Click on the table in the Report Panel and click on the Format button at the top of the Report Panel.

- Right Click on the data table (this is the table with all the detailed information by row)
- Select Format Table
- Select the General Tab



- In the General Tab, you are able to:
  a. Change the Table Name (this is ***strongly*** encouraged. By changing the table name, it becomes easier to know what you are clicking on in the Document Structure and Filters)
  b. Show Table headers (this is the Blue Header Row at the top of your table)
  c. Avoid duplicate row aggregation (if more than 1 data row exists for the displayed detail, each data row will be displayed if this box is checked, if the box is unchecked, the data will be combined into 1 row.)
  d. Show empty rows
  e. Show Table footers (this puts a blank row at the bottom of the table within each section)
  f. Show Table when empty
- Change the Table Name from **Data** to say **Employee Contact Info**
- Click Apply

- Select the Appearance Tab



- In the Appearance Tab, you should only change the Alternate color:
  a. Frequency (currently set at 2 for every other line)
  b. Color (currently set at gray)
- Change the color to RED
- Change the frequency to 3
- Click Apply
- Your table should now look like:

Organization: 05000305 - ARTSTATE COUNCIL ON THE ARTS

Employee Name	Class Description	Phone Num	Fax Num	Address I
BROWN,GINA S	ADMIN ASST III	269-6608	269-6601	411 W 4RD AVE STI
FOX,CHARLOTTE A	EXEC DIR COUNCIL OF ARTS	269-6610	269-6601	411 W 4RD AVE STI
MCNEILL,LESLIE S	FINE ARTS ADMINISTRATOR II	269-6610	269-6601	411 W 4RD AVE STI
NOBLE,ANDREA L	FINE ARTS ADMINISTRATOR II	269-6610	269-6601	411 W 4RD AVE STI
RAYL,CHRISTA A	OFFICE ASSISTANT II	269-6597	269-6601	411 W 4RD AVE STI

- Spacing creates a space or gap between your columns.
  - Change the spacing to .05
  - Click Apply

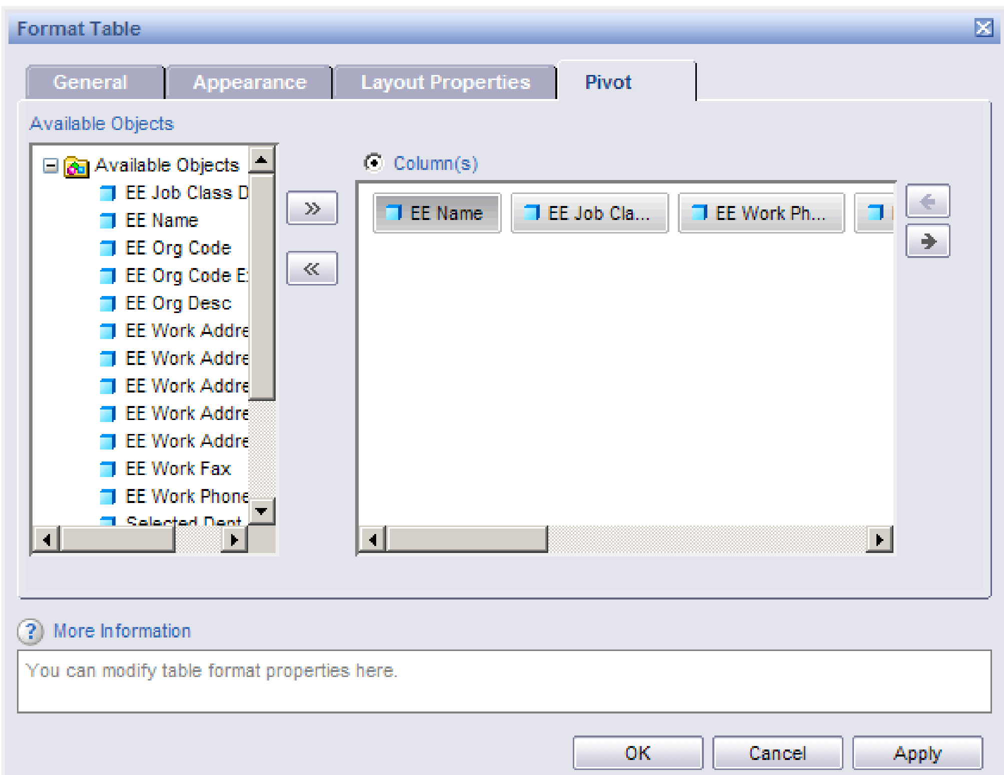
- Your table should now look like:

Organization: 05000305 - ARTSTATE COUNCIL ON THE ARTS

Employee Name	Class Description	Phone Num	Fax Num	Addre
BROWN,GINA S	ADMIN ASST III	269-6608	269-6601	411 W 4RD AVE
FOX,CHARLOTTE A	EXEC DIR COUNCIL OF ARTS	269-6610	269-6601	411 W 4RD AVE
MCNEILL,LESLIE S	FINE ARTS ADMINISTRATOR II	269-6610	269-6601	411 W 4RD AVE
NOBLE,ANDREA L	FINE ARTS ADMINISTRATOR II	269-6610	269-6601	411 W 4RD AVE
RAYL,CHRISTA A	OFFICE ASSISTANT II	269-6597	269-6601	411 W 4RD AVE

- Go back into Format Table and select the Pivot Tab

Note: We will go over the Layout Properties Tab for Cells, Tables, and Charts in Chapter 10. Layout Properties relate to how you position a Cell, Table, or Chart within the report.



- In the Pivot Tab, you can:
  - Add Available Objects to your table
    i. Use the drag and drop method
    ii. Use the double arrow (>>) to the left of the Columns panel
  - Arrange the Columns in the order that you want
    i. Use the drag and drop method
    ii. Use the left and right arrows to the right of the Columns panel
  - Remove Available Objects from you table
    i. Use the drag and drop method
    ii. Use the double arrow (<<) to the left of the Columns panel

- In the Column(s) panel, move the object **EE Job Class Desc** and place it in the 4th column (to the right side of EE Work Fax)
- In the Column(s) panel, remove the object **EE Work Address Zip**
- From the Available Objects panel, add the object **EE Org Code** in the 2nd column
- Click Apply
- Click OK

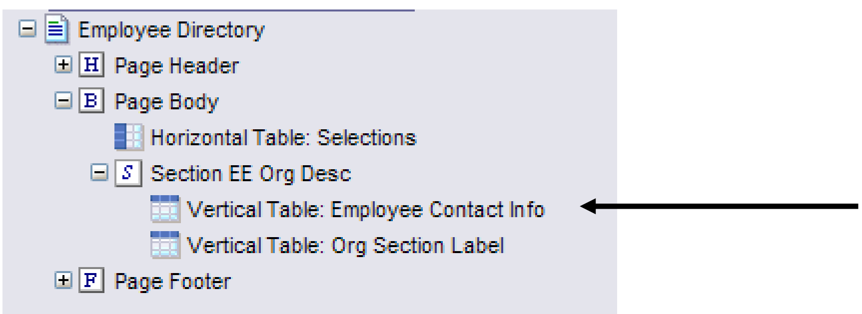
- Remove the extra row created by adding **EE Org Code**. Note that the Header for that column was typed in so that header will need to be corrected to say **Org Code**. Delete the empty column called **Zip**.

- Your table should look similar to this:

Organization: 05000305 - ARTSTATE COUNCIL ON THE ARTS

Employee Name	Org Code	Phone Num	Fax Num	EE Job Class Desc	Address Line 1	Address Line 2	
BROWN,GINA S	05000305	269-6608	269-6601	ADMIN ASST	411 W 4RD AVE STE 1E		ANC
FOX,CHARLOTTE A	05000305	269-6610	269-6601	EXEC DIR C	411 W 4RD AVE STE 1E		ANC
MCNEILL,LESLIE S	05000305	269-6610	269-6601	FINE ARTS /	411 W 4RD AVE STE 1E		ANC
NOBLE,ANDREA L	05000305	269-6610	269-6601	FINE ARTS /	411 W 4RD AVE STE 1E		ANC
RAYL,CHRISTA A	05000305	269-6597	269-6601	OFFICE ASS	411 W 4RD AVE STE 1E		ANC

- Go to Document Structure and Filters

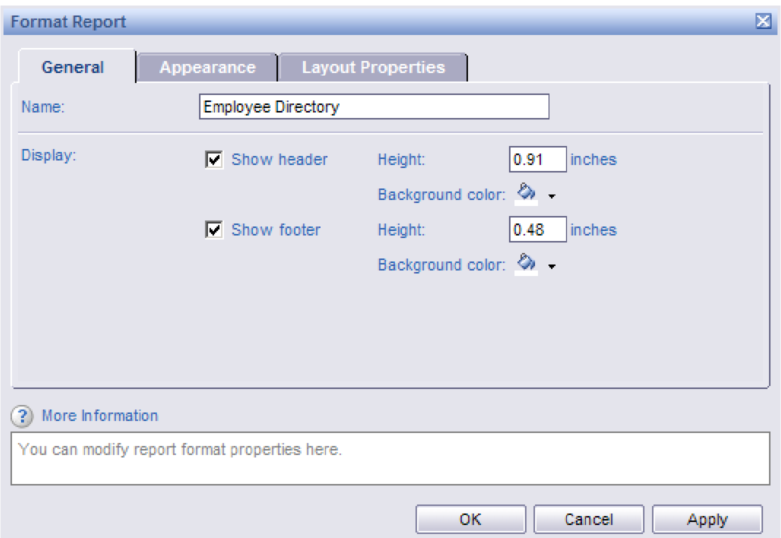


- Notice that we have a table titled: **Vertical Table: Employee Contact Info**
  - This is the table that we just formatted

Formatting a Report:

- There are 9 ways to format a report:
  1. Click on the report tab name in the Report Panel and click on the Format button at the top of the Report Panel.
  2. Right Click on the report tab name in the Report Panel and select Format Report.
  3. Double Click on the report tab name in the Report Panel in Document Structure and Filters.
  4. Click on the page body in the Report Panel and click on the Format button at the top of the Report Panel.
  5. Right Click on the page body in the Report Panel and select Format Report.
  6. Double Click on the page body in the Report Panel.
  7. Click next to the Selections Box and select Format from the Report Panel.
  8. Right Click next to the Header Box and select Format Report
  9. Right Click on the tab name at the bottom of the workspace panel and select Properties

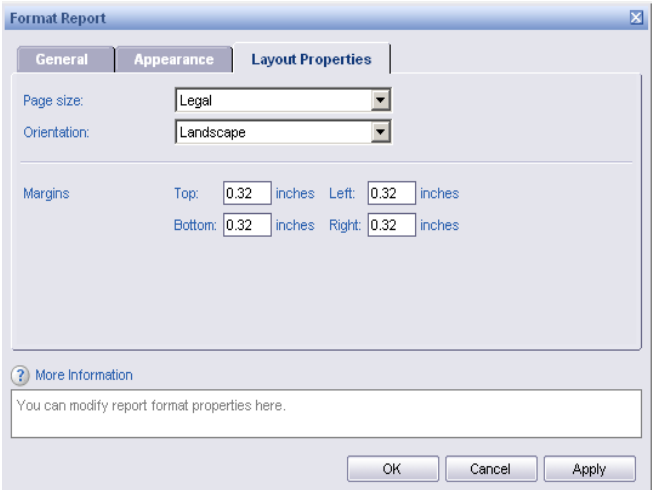
- All of the above options format the report within the same pop-up screen
- Click next to the Selections Box and select Format from the Report Panel
- Click on the General Tab



- In the General Tab, you can:
  - Change the report tab name (How it displays in the Document Structure and Filters).
  - Show the default header and change the position on the page.
  - Show the default footer and change the position on the page.
- For the report tab name, change it from **Employee Directory** to **EE Contact Info**
- Click Apply

Note: You can also change just the report tab name by double clicking on the tab at the bottom of the workspace panel.

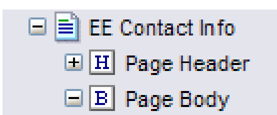
- You should not need to change anything in the Appearance Tab
- Click on the Layout Properties Tab



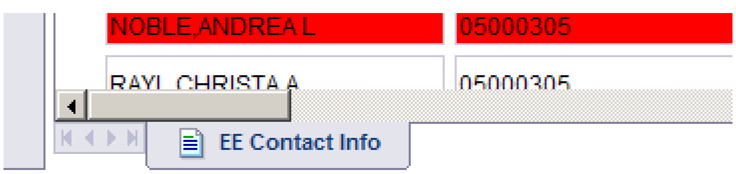
- In the Layout Properties Tab, you can;
  - Change the Page size (legal vs. letter)
  - Change the page Orientation (landscape vs. portrait)
  - Change the page margins
  - Once you have made the changes you need, Click OK

Note: All of the changes to the report MUST be made prior to printing your report or exporting the report to a PDF file. You cannot change the page/report layout in the PDF format. You will have to go back to ALDER and make these changes, and then convert the report to PDF again.

- Go to Document Structure and Filters to view the change to the report tab name.



- In the workspace panel, view how the tab name changed.



Save the report as **Employee Contact Information Formatting** in your *Class Exercises* folder

Summary:

After completing this chapter, you are now able to:

- Format Individual Cells or Columns
- Apply consistent formatting to an entire table
- Format a table
- Format the report

Exercise:

1. Find **Commercial Driver's License for Vendor** from the *Enterprise/Payroll/Employee/Specialized* folder**.** Copy to your *ALDER Class 101* folder and open the report from your folder.
2. Maximize your real estate
3. Refresh Data:
   - Report Effective Date: 12/24/2008
   - Report Point in Time Date: 12/24/2008
   - Service Center: General
4. Format the cell titled Cell:=DocumentName()
   - Change the Alignment to be to the Left and Top of the cell
   - Change the Font to be Helvetica, Bold Italic, 16, Blue with Yellow Background
   - Place a Thick Red border around the entire cell
5. Format the column Pos Location
   - Change the width to be 1.25
   - Change the Font to be Red Italic
   - Make the Top and Bottom border to be Medium and Green
6. Format the data table
   - Change the name to CDL Data
   - Change the alternating line color to Blue
   - Remove the columns Pos Org Code, Pos Region and EE Seasonal Indicator
   - Move EE Name to be in the 2nd column
   - Remove the blank columns
7. Format the report
   - Change the name to CDL for Vendor
   - Change orientation to Portrait
8. View the report in PDF Mode

9. This first page of the view in PDF should look like this:

Commercial Driver's License for V

Report Effective Date	12/24/2008
Report Point in Time Date	12/24/2008
Service Center(s)	GENERAL

Pos Dept Name	EE Name	PCN	EE ID	Pos Location	Pos Class Desc
COMMERCE	FORD-ROBERTS,JESSIE L	080523	309285	CAA	MECHANICAL TECHNICIAN
COMMERCE	MORIN,KEITH A	08X009	305720	CAA	KLC FACILITY MAINT SUPERVISO
COMMERCE	MORTON,MICHAEL J	080510	293525	CAA	DIR HEALTH, SAFETY & TRAININ
COMMERCE	WOOD,JASON A	08X015	307308	CAA	MAINT TECH (CORROSION CONT
COMMERCE	ZBITNOFF,JOHN A	080509	306684	CAA	KLC FACILITY ENGINEER
EDUCATION	ARNOLD,JOSHUA S	056526	290358	ARC	TEACHER, MT. EDGECUMBE HS
EDUCATION	BLACKHURST,CARL E	056034	308426	ARA	SOCIAL SERVICES SPECIALIST I
EDUCATION	BUCK,EMILY R	056033	310945	ARA	RECREATION ASSISTANT
EDUCATION	DAVIS,MARK J	056031	304961	ARC	MAINT GEN (F/L/J/SJ)
EDUCATION	MUDRY,JOSEPH,,JR	056016	310443	ARC	MAINT GEN (F/L/J/SJ)
EDUCATION	STRAIN,BRETT S	056018	308737	ARC	DORMITORY ATTENDANT
LABOR	ATKINSON-ELDE,JULIE A	058654	120545	DSA	ENVIRO SERVICES (F/L/J)
LABOR	BAILEY,CHRISTOPHER J	058550	300283	DSA	ENVIRO SERVICES (F/L/J)

10. Save in your *Class Exercises* folder as **CDL for Vendor Formatting.**

CHAPTER 9

Formulas and Variables

Goals and Objectives:

After you complete this chapter, you will be able to:

- Identify and use the Formula Toolbar
- Identify and use the Formula Editor
- Identify the Variable button and create a Variable
- Know the difference between a Formula and Variable

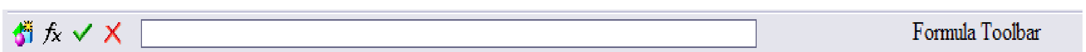
Introduction:

ALDER has the ability to:

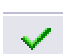
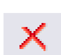
- Calculate simple formulas ([ObjectA] /[ObjectB])
- Concatenate words with numbers or objects ("Your available balance is " + [ObjectA])
- Calculate conditional functions If([ObjectA] = XX; then display this; otherwise display that)

- Go to your *Inbox* folder, find **CDL for Vendor Revised** and copy it to your *Class ALDER 101 folder*
- Open the report from your *Class ALDER 101*
- Maximize your real estate
- Click the Refresh Data button
- Change the Prompts
  - Report Effective Date: 1/1/2010
  - Report Point in Time Date: 1/1/2010
  - Service Center: GENERAL
- Click Run Query

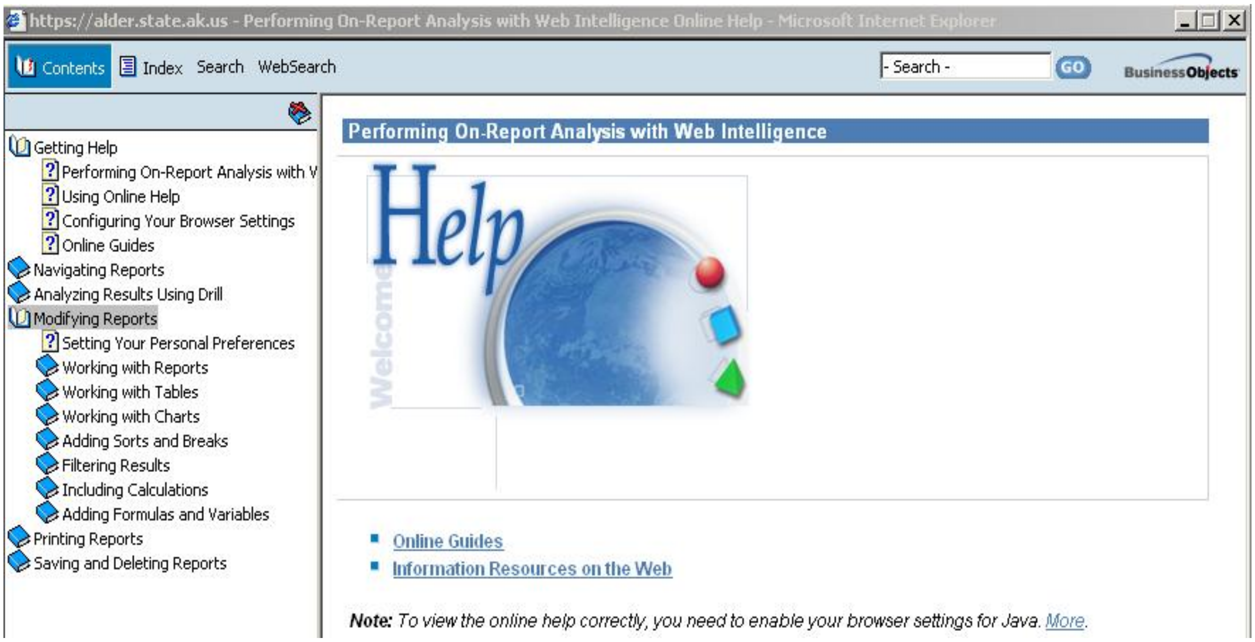
The Formula Toolbar looks like:



On the toolbar, you have the ability to:

- Create a Variable Button 
- Formula Editor Button 
- Validate Formula Button 
- Cancel Formula Button 
- Formula Box 

Note: For additional assistance in using specific functions, you can go to the Business Objects Help Page. Business Objects has examples of how to create formulas and functions, and what the syntax for each function is. Since ALDER has been customized for the State of Alaska, this is the *ONLY* topic that you should use the Business Objects Help Page for.



- *To access the Business Objects Help Page for formulas, you **must** be in an ALDER Report.*

Formulas:

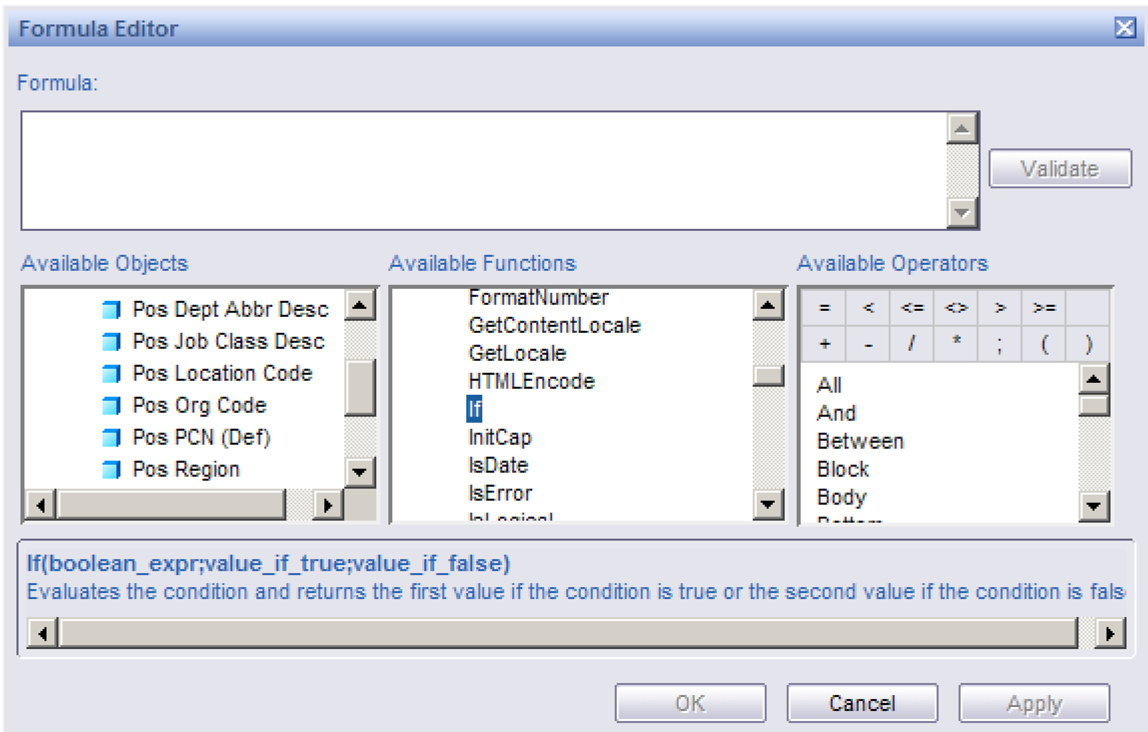
- ALDER does several calculations for you without having to use formulas. Using the Calculation button on the reporting toolbar you can:
  - Sum
  - Count
  - Average
  - Minimum
  - Maximum
  - Percentage

- Formulas are a way for you to calculate data that is not being retrieved with existing objects within the Universe. There are 2 ways to create a formula in ALDER.
  1. Use the Formula Box – If you are not familiar with the formula or function that you want to use, you should use the Formula Editor.
  2. Formula Editor – Allows you to view the different components (operators, objects, functions) of your formula as you add them. It also provides a brief description and the syntax of the function or object that you are trying to calculate on.

- **Simple Formula**

We are going to create a simple formula that calculates an amount based on 2 objects within the universe

- From the Report Panel, select Chart and Table Types
- Pull a Blank Cell onto the report next to the Selections Box
- Click on the Blank Cell
- Notice how the Formula Toolbar has been activated when you clicked on the Blank Cell
- Click on the Formula Editor Button 
- Notice, that in the pop-up box, we have 4 area's available to us:
    1. A formula box
    2. List of Available Objects
    3. List of Available Functions
    4. List of Available Operators



- In the formula box, we want to calculate the average number of employees in a location.
- From the Available Operators list, click on the = sign (or type it into the formula box)
- From the Available Objects list, scroll through the list and click on the measure EE Count.
- In the Available Operators list, click on the / (divide) sign
- From the Available Objects list, double click on the measure Location Count
- Before you can apply a formula, you will need to make sure that it has been defined correctly.
- Click on the Validate button
- If it is defined correctly, click the OK button twice
- If it is not defined correctly, you will need to fix the error
- Your answer should be **4.8**
- In the Report Panel, go to Available Objects
- Scroll to the bottom of the list and locate the formula

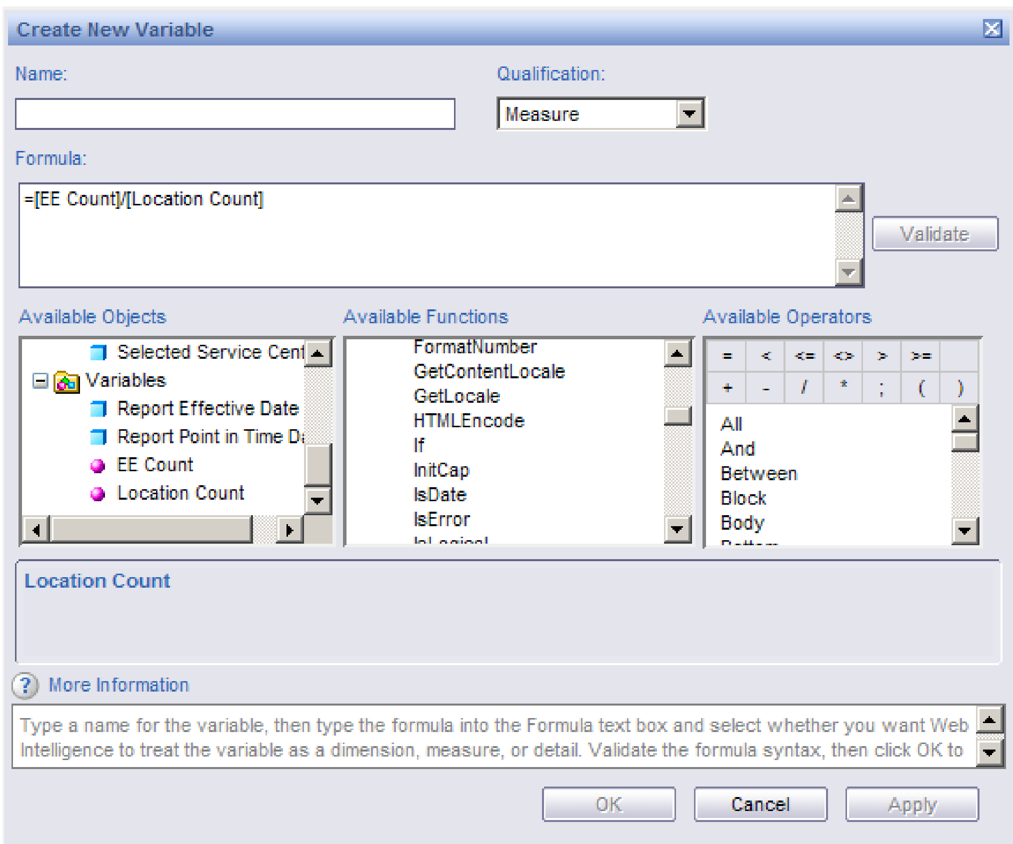
Variables:

- **Converting a Formula to a Variable**

Now that you have a simple formula, you decide that you want to be able to easily identify what the formula is for and that you will want to use it as a part of other formulas or as a filter within this report. To make things easier on yourself, you want to convert the formula that you just created into a variable. You cannot use formulas in other formulas but variables can be used in formulas. A variable is a way to name a formula.

- Click on the cell that we just created the formula in.
- See the formula on the toolbar

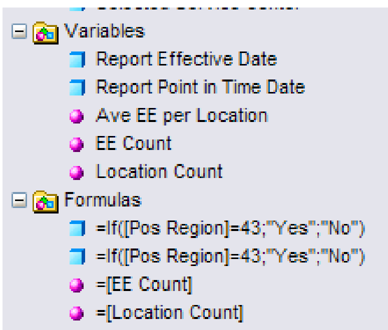
- Click on the Create Variable  button on the toolbar



- Notice, that in the pop-up box, we have 6 areas available to us:
    1. A Name box
    2. A Qualification Drop-Down list
    3. A formula box
    4. List of Available Objects
    5. List of Available Functions
    6. List of Available Operators

- Since we are converting a formula to a variable, we only need to assign a name to the formula and verify that the qualification is correct.
- In the Name box, type in **Ave EE per Location**
- Since we are not changing the formula, we do not need to validate the formula.
- Click OK
- Notice the formula has changed in the cell

- In the Report Panel, go to Available Objects
- Scroll to the bottom of the list and notice that the formula is no longer in the list
- Open the Variables folder
- See that you now have a measure object called Ave EE per Location

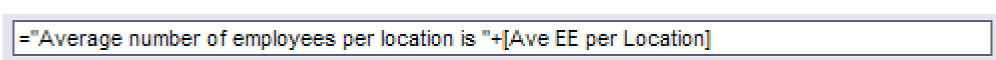


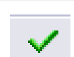
- **Concatenating a Formula using a Variable**

RULES:

- When you use words or characters in your formula, you must have double quotes at the beginning and ending of the character string.
- Use additional spaces either at the beginning or ending of the double quotes when adding to an object to allow for spaces to be displayed in the cell.

- Click on the cell that the Variable is in
- Click in the Formula Box on the toolbar between the = and the object [Ave EE per Location]
- Type in "Average number of employee per location is "+
- Your formula should look like



- Validate the formula by clicking on the green validate button 
- If the formula is defined correctly, it will automatically update your cell
- If it is not defined correctly, you will need to fix the formula
- Your cell should look like:

- **Creating a new Variable using a conditional function**

There are several functions available in ALDER. The Business Objects help button provides assistance on how to use or define each of the functions that are available.

Scenario:

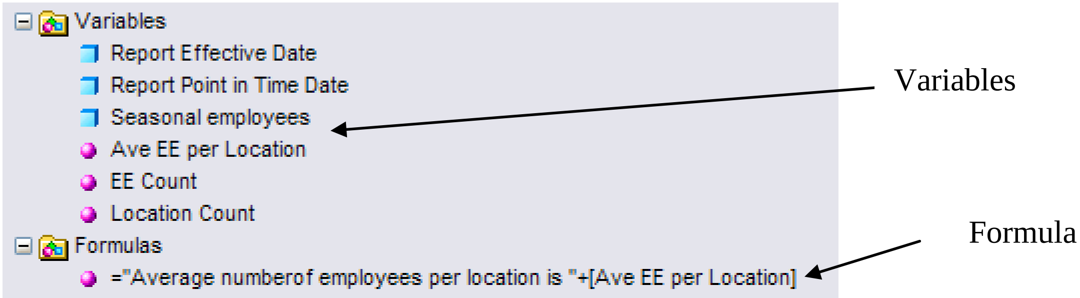
You want to point out those employees on the list that work full time seasonally.

- Right click on the first column in the data table
- Select Insert New Column to the Right
- Click on the new column (it should be empty)
- Click on the Create Variable Button in the format toolbar  .
- Name your variable Seasonal Employees
- Leave the Qualification as a Dimension
- In the Formula Box, input the following formula
- =If([EE Seasonal Indicator]="FS";"Seasonal";"")
- Validate the variable
- If it is defined correctly, click ok
- If the variable has an error, fix it and revalidate
- Scroll through your report and find any row that says FT **Seasonal**
- Click on the blank Blue Header Row box at the top of the column
- Click in the formula box on the toolbar
- Type in Seasonal Employees
- Your report should look similar to:

Pos Dept Name	Seasonal Employees	PCN	Emp Name	EE ID	Pos Org Code	Pos Location	Pos Region	Pos Class Desc
COMMERCE		080509	ZBITNOFF,JOHN A	306684	08010501	CAA	01	KLC FACILITY ENGINEER
COMMERCE		080510	MORTON,MICHAEL J	293525	08010501	CAA	01	DIR HEALTH, SAFETY & TRAINING
COMMERCE		080523	FORD-ROBERTS,JESSIE L	309285	08010501	CAA	01	MECHANICAL TECHNICIAN
COMMERCE		080533	MANUES,TRAVIS E	312389	08010501	CAA	01	MAINT TECHNICIAN - FACILITIES
COMMERCE		08X009	MORIN,KEITH A	305720	08010501	CAA	01	MAINTENANCE TECHNICIAN - HVAC
COMMERCE		08X014	SCHMIDT,DERIC A	307309	08010501	CAA	01	MAINT TECH (CORROSION CONTROI
COMMERCE		08X015	WOOD,JASON A	307308	08010501	CAA	01	MAINT TECH (CORROSION CONTROI
EDUCATION		056016	MUDRY,JOSEPH,,JR	310443	05000602	ARC	00	MAINT GEN (F/L/J/SJ)
EDUCATION		056031	DAVIS,MARK J	304961	05000602	ARC	00	MAINT GEN (F/L/J/SJ)
EDUCATION		056526	ARNOLD,JOSHUA S	290358	05000601	ARC	00	TEACHER, MT. EDGECUMBE HS
EDUCATION	Seasonal	056018	PERKINS,SHIRLEY C	293757	05000602	ARC	00	DORMITORY ATTENDANT
EDUCATION	Seasonal	056033	BUCK,EMILY R	310945	05000602	ARA	00	RECREATION ASSISTANT
EDUCATION	Seasonal	056034	BLACKHURST,CARL E	308426	05000602	ARA	00	SOCIAL SERVICES SPECIALIST III
LABOR		058435	MICHAUD,DANIEL P	215606	07437162	DSA	43	MAINT SPEC BFC (F/LJ/J)

- In the Report Panel, scroll through your available objects list.

- You have added 2 variables and 1 formula that you created for this report.



- You can now drag your variables or formulas onto any tab within this report document.
- Save your report as **CDL for Vendor Formulas & Variables** in your *Class Exercises* folder.

Summary:

After completing this chapter, you are now able to:

- Identify and use the Formula Toolbar
- Identify and use the Formula Editor
- Identify the Variable button and create a Variable
- Now the difference between a Formula and Variable

Review:

1. Where can you find help to define and use functions?

2. What is the difference between a formula and a variable?

3. What are the 4 areas in the Formula Editor and what are they used for?

4. Why would you create a variable?

Exercise:

1. From your Inbox, open the report **Current Vacant Position Detail Revised**
2. Maximize your real estate
3. Refresh Data:
    a. Report Effective Date: 7/15/2010
    b. Report Point in Time Date: 6/30/2010
    c. Department(s): 5
    d. Region(s): 0
    e. Division(s): 9
    f. Section(s): 999
    g. Job Class Code: ALL
    h. Location Code: ALL

4. You want to calculate average number of days a position is vacant for the entire report
    a. Create a variable called **PCN Count**
        i. Click on the data in the column Pos PCN
        ii. Using the Calculations Button choose Count
        iii. At the bottom of the report table put your cursor in the a cell that shows the count of PCNs
        iv. Click on the Variable Button and name this variable **PCN Count**
    b. Create a variable called **Days Vacant**
        i. Click on the data in the **Pos Days Vacant** Column
        ii. Using the Calculations Button choose Sum
        iii. At the bottom of the report table put your cursor in the cell that shows the sum of days vacant
        iv. Click on the Variable Button and name this variable **Days Vacant**
5. Pull a Blank Cell onto the report next to the Selections Box
6. In the Blank Cell, create the average days vacant by using the formula [**Days Vacant**] **/** [**PCN Count**]
        i. HINT: you must use the variables you created
7. Your answer should be **1133.79**
8. Create a variable called Average Days Vacant from the formula [**Days Vacant**] **/** [**PCN Count**] Add the words **Average Days Vacant** to the cell so the is looks like this:
    a. Average Days Vacant 1,133.79
9. Save your report as **Current Vacant Positions Revised Formula & Variable** in your *Class Exercises* folder

CHAPTER 10

Sections, Breaks, and Table Sorts

- Goals and Objectives
- Table Sorts
  - Ascending
  - Descending
  - Custom Sorts
  - Updating Selections Box for Table Sorts
  - Removing Table Sorts
- Breaks
  - Setting data breaks
  - Adding calculations to breaks
  - Break Properties
  - Removing breaks
- Sections
  - Setting data as a section
  - Adding tables for section headers and footers
  - Effects in Document Structures and Filters
  - Effects in Navigation Map

Goals and Objectives:

After you complete this chapter, you will be able to:

- Apply and remove table sorts to a table
- Apply and remove breaks to data in a table
  - Insert calculations to breaks (sum, count, etc.)
- Apply and remove sections to your report
  - Add Section Headers
  - Add Section Footers/Totals

Introduction:

ALDER inherently sorts data from the left to the right in a table. You can change how the data is sorted and displayed. There are 3 different types of sorts:

1. Table Sorts
2. Breaks
3. Sections

Sorts are applied first by section, then by breaks, and finally by table sorts.

Table sorts apply ascending, descending, or custom sorts to specific columns within a data table. The data is then sorted based on the 1st column that you applied a sort to. In the example below, the first table is not sorted. The second table is sorted based on Pos PCN (Def) column.

Emp ID	Pos Work Type	Pos PCN (Def)	Pos Job Class	Pos Job Class Desc	Pos Range	Pos Location Code
107586	FACL	031252	P7109	VICTIM/WITNESS PARALEGAL II	16	DKA
117727	FACL	030011	K0051	DIVISION OPERATIONS MANAGE	24	AWA
119036	FACL	030335	P7106	PARALEGAL II	16	EBA
150723	FACL	030020	P7505	LAW OFFICE MANAGER I	15	JBA
159761	FACL	030036	P7503	LAW OFFICE ASSISTANT II	13	EBA

Emp ID	Pos Work Type	Pos PCN (Def)	Pos Job Class	Pos Job Class Desc	Pos Range	Pos Location Code
117727	FACL	030011	K0051	DIVISION OPERATIONS MANAGE	24	AWA
293633	FACL	030013	P7503	LAW OFFICE ASSISTANT II	13	AWA
285014	FACL	030014	P7503	LAW OFFICE ASSISTANT II	13	JBA
309273	FACL	030016	K0003	INTERNET SPECIALIST I	16	EBA
205516	FACL	030017	P1134	ADMINISTRATIVE CLERK II	08	AWA

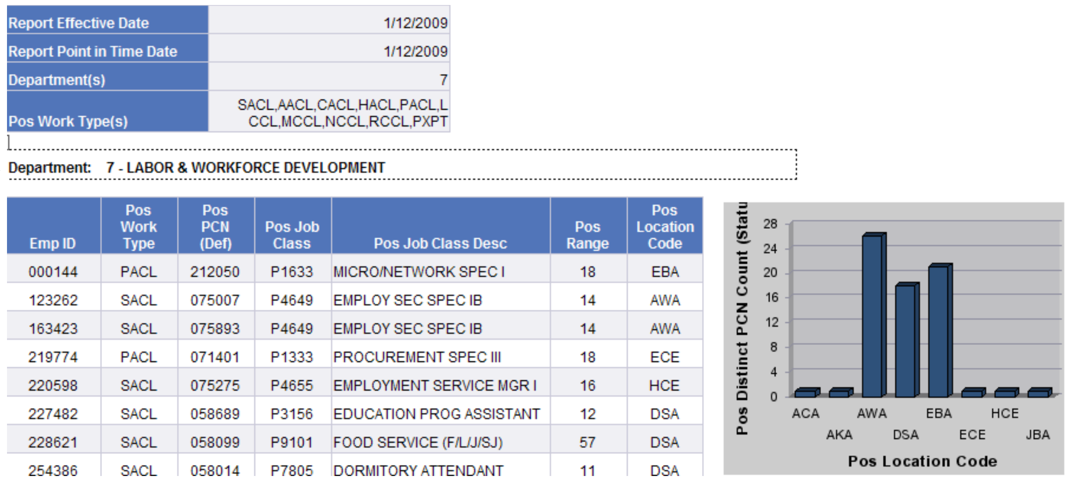
Breaks separate all of the data based on the unique value that you selected. Breaks allow the end user to read the data in a table easier. It is an easy visual aid for viewing the data. Along with breaking up the data, ALDER inserts a blank row at the bottom of each break in data so that you can insert a calculation. (e.g., Sum, Count, etc.) Breaks group data within a table. In the example below, the first table does not have a break; the second table has a break on Pos Job Class.

Emp ID	Pos Work Type	Pos PCN (Def)	Pos Job Class	Pos Job Class Desc	Pos Range	Pos Location Code
107586	FACL	031252	P7109	VICTIM/WITNESS PARALEGAL II	16	DKA
117727	FACL	030011	K0051	DIVISION OPERATIONS MANAGE	24	AWA
119036	FACL	030335	P7106	PARALEGAL II	16	EBA
150723	FACL	030020	P7505	LAW OFFICE MANAGER I	15	JBA
159761	FACL	030036	P7503	LAW OFFICE ASSISTANT II	13	EBA

Emp ID	Pos Work Type	Pos PCN (Def)	Pos Job Class	Pos Job Class Desc	Pos Range	Pos Location Code
296594	FACL	086028	K0006	PUB ADVOCATE UTIL ANALYST I	22	EBA
	FACL	086065		PUB ADVOCATE UTIL ANALYST I	22	EBA
268642	FACL	086071		PUB ADVOCATE UTIL ANALYST I	22	EBA
253977	FACL	086073		PUB ADVOCATE UTIL ANALYST I	22	EBA
			K0006			

Sections allow you to group data for the entire report. A report includes any tables or charts that are sitting next to each other within a report tab. When the data is set as a section, the unique value is removed from the data table and placed in a cell at the top of the section. In the example below, the report is sectioned by Position Department Extended name. The section is applied to both the data table and the chart to the right of it.

SECTION



Report Effective Date	1/12/2009
Report Point in Time Date	1/12/2009
Department(s)	7
Pos Work Type(s)	SACL,AACL,CACL,HACL,PACL,LCCL,MCCL,NCCL,RCCL,PXPT

Department: 7 - LABOR & WORKFORCE DEVELOPMENT

Emp ID	Pos Work Type	Pos PCN (Def)	Pos Job Class	Pos Job Class Desc	Pos Range	Pos Location Code
000144	PACL	212050	P1633	MICRO/NETWORK SPEC I	18	EBA
123262	SACL	075007	P4649	EMPLOY SEC SPEC IB	14	AWA
163423	SACL	075893	P4649	EMPLOY SEC SPEC IB	14	AWA
219774	PACL	071401	P1333	PROCUREMENT SPEC III	18	ECE
220598	SACL	075275	P4655	EMPLOYMENT SERVICE MGR I	16	HCE
227482	SACL	058689	P3156	EDUCATION PROG ASSISTANT	12	DSA
228621	SACL	058099	P9101	FOOD SERVICE (F/L/J/SJ)	57	DSA
254386	SACL	058014	P7805	DORMITORY ATTENDANT	11	DSA

Applying Table Sorts:

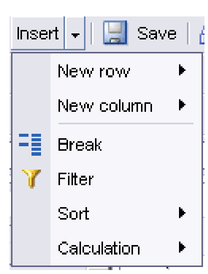
Note: All Enterprise Reports may have Sections and Breaks applied to them, but they do not have any Table Sorts pre-applied to them. In ALDER, Table Sorts are applied after Sections and Breaks. Table Sorts will not over-ride Section and Breaks.

There are 3 different types of table sorts:

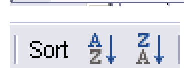
1. Ascending – sorts data in alpha/numeric order
2. Descending – sorts data in reverse alpha/numeric order
3. Custom – sorts data on a custom sort order defined by the user

Sorts can be applied in 3 ways:

1. Menu button



2. Report Toolbar Button



3. Right Click on the column

- Copy **Positions by Position Work Type** from *Enterprise/Payroll/Position/Statistics* to your *Class ALDER 101* folder
- From your *Class ALDER 101* find and open the report **Positions by Position Work Type**
- Refresh Data
    - Report Effective Date: 1/12/2009
    - Report Point in Time Date: 1/12/2009
    - Department(s): 7
    - Pos Work Type(s): AACL;CACL;FACL;HACL;PACL;SACL
- Run Query
- Remove the columns EE Name (Vacant) , EE Acting Stat, Pos Barg Unit and EE Step if you want the results to match
- Notice that this report is already sectioned by Department and that everything is currently being sorted from left to right in ascending order, in this case by Emp ID

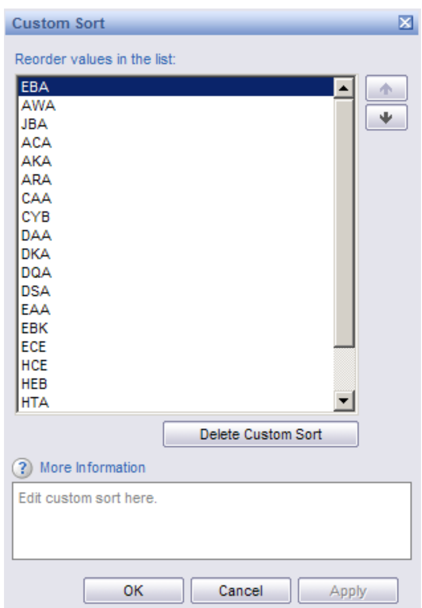
Emp ID	Pos Work Type	Pos PCN (Def)	Pos Job Class	Pos Job Class Desc	Pos Range	Pos Location Code
000120	FACL	052088	P3332	VOC REHAB ASSIST II	12	EBA
000144	PACL	212050	P1633	MICRO/NETWORK SPEC I	18	EBA
102569	FACL	075635	P1642	DATA PROCESSING MGR II	23	AWA
102626	FACL	052141	P3342	VOC REHAB MANAGER	21	EBA
103561	FACL	075005	P4633	SUPVR, UNEMPL INS TAX	23	AWA
103603	FACL	213106	P2270	GRANTS ADMINISTRATOR II	17	EBA
107704	FACL	213050	P4678	PROG COORDINATOR	20	EBA
109567	FACL	075545	P2208	ECONOMIST III	20	EBA
110538	FACL	075068	P2208	ECONOMIST III	20	AWA
110612	FACL	075654	P4661	EMPLOY SEC ANALYST III	18	AWA
111352	FACL	073058	P4694	WORKER COMP TECHNICIAN	12	EBA
111717	FACL	075841	P4661	EMPLOY SEC ANALYST III	18	AWA
112730	FACL	075317	P4612	UNEMPLOYMENT INS SPEC II	14	AWA
114350	FACL	071717	P2211	STATE DEMOGRAPHER	22	AWA
115707	FACL	075850	P4649	EMPLOY SEC SPEC IB	14	EBA
116089	FACL	075351	P4667	ASST DIR EMPLOY SECURITY	22	AWA
117139	FACL	075695	P4661	EMPLOY SEC ANALYST III	18	AWA
117502	FACL	052100	P4678	PROG COORDINATOR	20	EBA
119854	FACL	075460	P1793	RESEARCH ANALYST II	16	AWA

- To sort by Position Work Type right click on the column Pos Work Type
- Select Sort
- Notice that the sort option Remove Sorts is grayed out. This means that there currently are no sorts applied to this table.
- Select **Descending**

- Notice that now everything is being sorted from left to right based on the data in the Pos Work Type column.

Emp ID	Pos Work Type	Pos PCN (Def)	Pos Job Class	Pos Job Class Desc	Pos Range	Pos Location Code
123262	SACL	075007	P4649	EMPLOY SEC SPEC IB	14	AWA
163423	SACL	075893	P4649	EMPLOY SEC SPEC IB	14	AWA
220598	SACL	075275	P4655	EMPLOYMENT SERVICE MGR I	16	HCE
227482	SACL	058689	P3156	EDUCATION PROG ASSISTANT	12	DSA
228621	SACL	058099	P9101	FOOD SERVICE (F/L/J/SJ)	57	DSA
254386	SACL	058014	P7805	DORMITORY ATTENDANT	11	DSA
267223	SACL	058608	P9101	FOOD SERVICE (F/L/J/SJ)	57	DSA
269580	SACL	058670	P9171	ENVIRO SERVICES (F/L/J)	60	DSA
270593	SACL	075776	P4649	EMPLOY SEC SPEC IB	14	EBA
271918	SACL	075720	P4649	EMPLOY SEC SPEC IB	14	AWA
272740	SACL	058436	P3220	RECREATION ASSISTANT	11	DSA
276676	SACL	075632	P4649	EMPLOY SEC SPEC IB	14	EBA
277262	SACL	075838	P4649	EMPLOY SEC SPEC IB	14	AWA

- Now you want to apply a custom sort for the Location Code. For each Job Class, you want to see all locations for EBA (Anchorage) first, then AWA (Juneau) then JBA (Fairbanks) then all other codes
- Right click on the column for Pos Location code
- Select Sort; Custom Sort
- In the pop-up window, click on the location code EBA and move it to the top of the list. You must use the up arrow at the top right of the pop-up box.
- Repeat the process for Pos Location Codes AWA and JBA. Your pop-up box should look like this:



- Click OK
- At this point the Custom Sort is now defined but to apply it you must click on the Pos Location Code column, right click, choose **Sort** then **Ascending.**

- Your data should now show all the positions in location EBA at the beginning of the report.

Emp ID	Pos Work Type	Pos PCN (Def)	Pos Job Class	Pos Job Class Desc	Pos Range	Pos Location Code
270593	SACL	075776	P4649	EMPLOY SEC SPEC IB	14	EBA
276676	SACL	075632	P4649	EMPLOY SEC SPEC IB	14	EBA
279796	SACL	075589	P4649	EMPLOY SEC SPEC IB	14	EBA
279985	SACL	075863	P4649	EMPLOY SEC SPEC IB	14	EBA
285939	SACL	075466	P4649	EMPLOY SEC SPEC IB	14	EBA
300349	SACL	075557	P4649	EMPLOY SEC SPEC IB	14	EBA
307474	SACL	072078	P7767	INVESTIGATOR II	16	EBA
308619	SACL	075869	P4649	EMPLOY SEC SPEC IB	14	EBA
309845	SACL	075718	P4649	EMPLOY SEC SPEC IB	14	EBA
309846	SACL	075725	P4649	EMPLOY SEC SPEC IB	14	EBA
310773	SACL	075665	P4649	EMPLOY SEC SPEC IB	14	EBA
310775	SACL	075051	P4649	EMPLOY SEC SPEC IB	14	EBA
310776	SACL	075124	P4649	EMPLOY SEC SPEC IB	14	EBA
310781	SACL	075878	P4649	EMPLOY SEC SPEC IB	14	EBA
310782	SACL	075187	P4649	EMPLOY SEC SPEC IB	14	EBA
310783	SACL	075824	P4649	EMPLOY SEC SPEC IB	14	EBA

- Once you have applied your sorts, you will want to update the Selections Box. This will help the end user know in what order sorts have been applied.
- Insert 2 rows to the bottom of the Selections Box
- Update the Selections Box to look like:

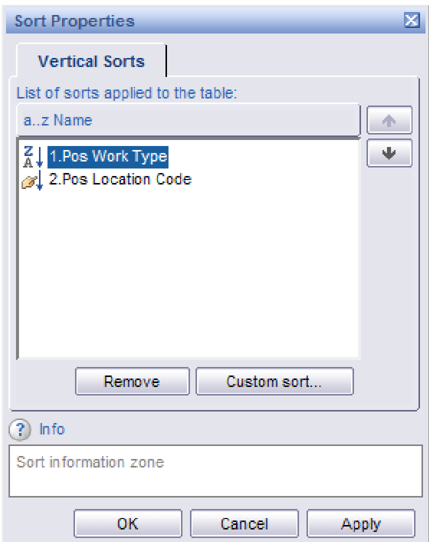
Report Effective Date	1/12/2009
Report Point in Time Date	1/12/2009
Department(s)	7
Pos Work Type(s)	SACL,AACL,CACL,HACL,PACL,FACL
Sorted by	Pos Work Type
	EBA,AWA,JBA,Alphabetic

- Save the report as **Positions by Position Work Type with Custom Sort** in your *Class Exercises* folder

Sort Properties:

Once you've finished applying Sorts to your report, you decide that you want to change the order of the Sorts. In the example above, the sorts are being applied in the order that you set them. You can change the Sort order through Sort Properties.

- Right click on the column Emp ID
- Select Sort Properties
- The pop-up window looks like:



- You can also re-order Sort by. If you wanted the first sort to be **Pos Location Code**, you can click on the title and use the up-arrow to move it. This would make **Pos Location Code** the primary sort.
- You can redefine your custom sort. Click on the Custom Sort button to allow you to re-order your values.
- Also you can remove the sorts from the table.
- Click Cancel.

Removing Table Sorts:

- To remove 1 column sort at a time, right click on the column that you want to remove the sort for.
- Select Sort; None

- To remove all sorts applied to the table, right click on any column within the table
- Select Sort; Remove Sorts

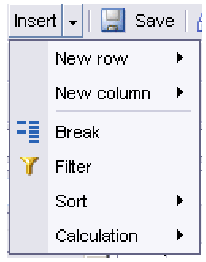
  If you remove the table sorts, don't forget to update your Selections Box

- **Remove all of the table sorts**
- **Update the Selections Box**

Breaks:

Breaks can be applied in 3 ways:

1. Menu button



2. Report Toolbar Button

3. Right Click on the column

Breaks separate all of the data based on the unique value that you selected. It is a visual aid to make reading the data table easier. The unique value is only displayed once in the data table within a Section.

- Choose the column **Pos Job Class** and click on the Break button of the Report Toolbar.
- Notice how the data is now grouped by **Pos Job Class** and that a blank row has been place at the bottom of each Pos Job Class
- Click on the column Pos PCN (make sure the data cells have turned gray)
- From the Report Toolbar, click on the down arrow next to the Calculation button
- Select Count
- Now there is a count of the number of PCNs in each job class

- The beginning of your data table should now look like this:

Emp ID	Pos Work Type	Pos PCN (Def)	Pos Job Class	Pos Job Class Desc	Pos Range	Pos Location Code
189137	FACL	075821	K0017	ADMINISTRATIVE ASSISTANT I	12	AWA
230732	FACL	071222		ADMINISTRATIVE ASSISTANT I	12	AWA
276671	FACL	213115		ADMINISTRATIVE ASSISTANT I	12	JBA
	FACL	075040		ADMINISTRATIVE ASSISTANT I	12	DQA
	Count	4	K0017			

Emp ID	Pos Work Type	Pos PCN (Def)	Pos Job Class	Pos Job Class Desc	Pos Range	Pos Location Code
220711	FACL	052205	K0018	ADMINISTRATIVE ASSISTANT II	14	EBA
230816	FACL	075128		ADMINISTRATIVE ASSISTANT II	14	EBA
260858	FACL	075044		ADMINISTRATIVE ASSISTANT II	14	AWA
270023	FACL	071703		ADMINISTRATIVE ASSISTANT II	14	AWA
279635	FACL	075327		ADMINISTRATIVE ASSISTANT II	14	AWA
290968	FACL	213121		ADMINISTRATIVE ASSISTANT II	14	EBA
291621	FACL	058395		ADMINISTRATIVE ASSISTANT II	14	DSA
292925	FACL	052004		ADMINISTRATIVE ASSISTANT II	14	AWA
294252	FACL	075624		ADMINISTRATIVE ASSISTANT II	14	AWA

- You can apply Breaks to more than 1 column within the data table.
- Add another break to the column **Pos Location Code**
- The beginning of your report should look like this

Emp ID	Pos Work Type	Pos PCN (Def)	Pos Job Class	Pos Job Class Desc	Pos Range	Pos Location Code
189137	FACL	075821	K0017	ADMINISTRATIVE ASSISTANT I	12	AWA
230732	FACL	071222		ADMINISTRATIVE ASSISTANT I	12	
						AWA
Emp ID	**Pos Work Type**	**Pos PCN (Def)**	**Pos Job Class**	**Pos Job Class Desc**	**Pos Range**	**Pos Location Code**
276671	FACL	213115		ADMINISTRATIVE ASSISTANT I	12	JBA
						JBA
Emp ID	**Pos Work Type**	**Pos PCN (Def)**	**Pos Job Class**	**Pos Job Class Desc**	**Pos Range**	**Pos Location Code**
	FACL	075040		ADMINISTRATIVE ASSISTANT I	12	DQA
						DQA

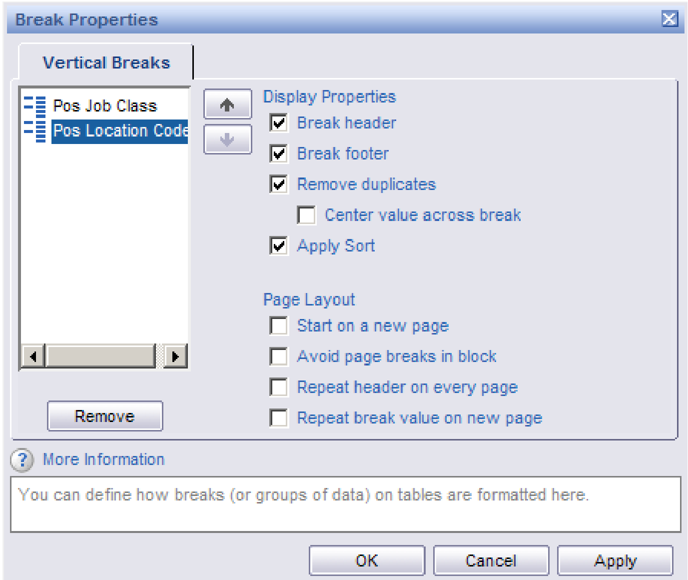
- Save the report as **Positions by Position Work Type with Breaks** in your *Class Exercise* folder.

Break Properties:

Once you've finished applying Breaks to your report, you decide that you want to change the order of the Break Sort. In the example above, the Breaks are being applied in the order that you set them. You can change the Break order through Break Properties.

- Right click on the column **Pos Location Code**
- Select Break then Properties

- The pop-up window looks like:

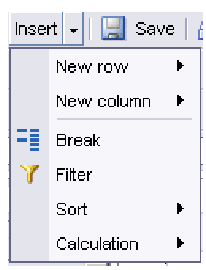


- From this window, you can add headers, footers, remove duplicates (headers or footers), apply sort, etc.
- This is a way to format your Breaks
- You can also re-order the sequencing of your Breaks. If you wanted the first Break to be Pos Location Code, you can click on the title and use the up-arrow to move it. This would make Pos Location Code the primary Break.
- Click Cancel

Removing Breaks:

You can remove Breaks 4 ways:

- Menu button



- Report Toolbar Button

- Right Click on the column, Select Break; Remove
- Right Click on the column, Select Break, Properties; Remove

Remove the break on Pos Location Code but <u>not</u> from Pos Job Class Code.

Sections:

Sections allow you to group data for the entire report. When the data is set as a section, the unique value is removed from the data table and placed in a cell at the top of the section. You can place summary totals anywhere within a section.

In the report we are working on, notice that there is the word "Department" then the department number and full name.

Department: 7 - LABOR & WORKFORCE DEVELOPMENT

Emp ID	Pos Work Type	Pos PCN (Def)	Pos Job Class	Pos Job Class Desc	Pos Range	Pos Location Code	Pos Barg Unit
189137	FACL	075821	K0017	ADMINISTRATIVE ASSISTANT I	12	AWA	GG
230732	FACL	071222		ADMINISTRATIVE ASSISTANT I	12	AWA	GG
276671	FACL	213115		ADMINISTRATIVE ASSISTANT I	12	JBA	GG
	FACL	075040		ADMINISTRATIVE ASSISTANT I	12	DQA	GG
	Count:	4	K0017				

Emp ID	Pos Work Type	Pos PCN (Def)	Pos Job Class	Pos Job Class Desc	Pos Range	Pos Location Code	Pos Barg Unit
220711	FACL	052205	K0018	ADMINISTRATIVE ASSISTANT II	14	EBA	GG

There are two ways to set a section:

- Drag & Drop
- Use object that exists within the table (preferred method)

- We are going to set a section for the column Pos Work Type
- In the Report Panel, select Document Structures and Filters
- Notice that we currently have a section for Pos Dept

BEFORE we set anything as a section, we will want to "Purge" our data and then walk through the Document Structure and Filters outline to name our tables. Later when we set a section often tables will "jump" to the wrong section and this will be very helpful when we set a section and need to format the report.

To **"Purge"** the data currently being displayed, we will select an account that does not have data posted to it.

- Click Refresh Data
- Change the prompt "Enter Department Num(s) or Enter 999 for All" from 7 to 0 (zero)
- Click Run Query
- Since this department does not have data posted to it, ALDER will display an error "NO DATA RETRIEVED"
- Click OK

In Document Structure and Filters, we need to name our tables to make them easier to find in the report.

Page Body

- Click on Page Body; notice that there are 2 tables under the page body.
- Under Page Body, click on the Horizontal Table

- In the Report Panel, click the Format button just below the Document Structure and Filters box.
- In the General Tab for the pop-up box Format Table, verify that the name is **"Selections"**
- Click OK

Section Department

- Click on the Section Dept Section Label
- In the report, you should see a broken gray area:

Report Effective Date	1/12/2009
Report Point in Time Date	1/12/2009
Department(s)	
Pos Work Type(s)	

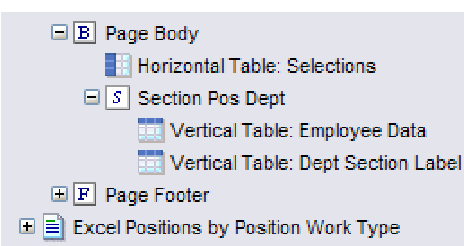
Department:

Emp ID	Pos Work Type	Pos PCN (Def)	Pos Job Class	Pos Job Class Desc	Pos Range	Pos Location Code	Pos Barg Unit

- Notice that this table has two parts. The first is Department: and the second is the object Pos Dept Ext Name which stands for Position Department Extended Name
- In the Report Panel, click the Format button
- In the General Tab for the pop-up box Format Table, verify that the name is **Dept Section Label**. Change it if it is not.
- Click OK
- Click on the other table under Section Pos Dept that has not been named

- Verify in the report that the table highlighted is the data table
- In the Report Panel, click the Format button
- In the General Tab for the pop-up box Format Table, change the name to **Employee Data**.
- Click OK

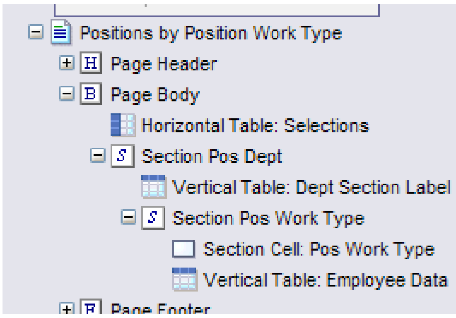
Your Document Structure and Filters out-line should now look like this:



- Save the report as **Positions by Position Type Section V.1**

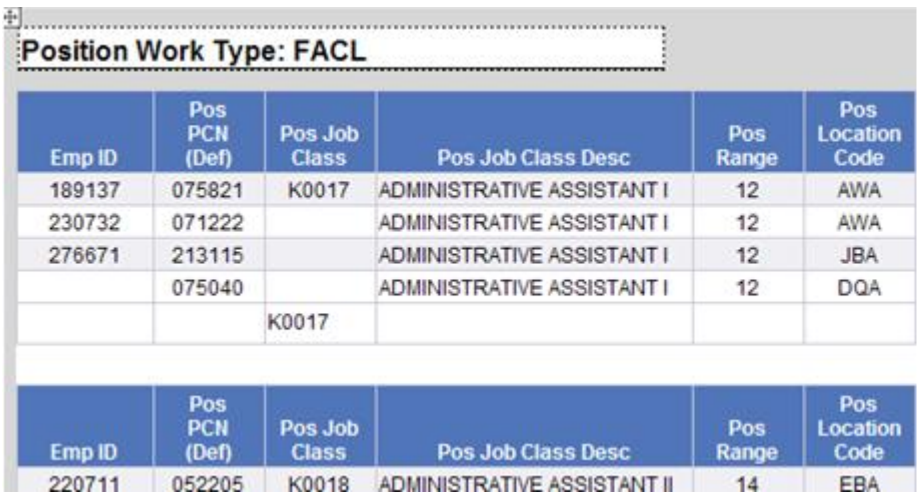
We are now ready to set Pos Work Type as a Section. Occasionally our data tables will try to jump to the new section. Naming our tables helps us know what tables we are looking at.

- Refresh the data using the previous settings.(Use department = 7)
- Right click on the column **Pos Work Type**, on the data rather than the header.
- Select Set as Section
- In Document Structures and Filters, notice that we now have a section for **Pos Work Type**
- We also have a Section Cell Pos Work Type



Notice that our data table is now in the Section **Pos Work Type**. This is the correct location for our Employee Data table; however, there are times when a table is not in the correct positions. Click on our new section and in the formula bar type **="Position Work Type: "+[Pos Work Type**]. Notice the space between **:** and **"**

- Extend the field to the end of the Selections Box and delete the blank column
- Your section should begin like this.



Position Work Type: FACL

Emp ID	Pos PCN (Def)	Pos Job Class	Pos Job Class Desc	Pos Range	Pos Location Code
189137	075821	K0017	ADMINISTRATIVE ASSISTANT I	12	AWA
230732	071222		ADMINISTRATIVE ASSISTANT I	12	AWA
276671	213115		ADMINISTRATIVE ASSISTANT I	12	JBA
	075040		ADMINISTRATIVE ASSISTANT I	12	DQA
		K0017			

Emp ID	Pos PCN (Def)	Pos Job Class	Pos Job Class Desc	Pos Range	Pos Location Code
220711	052205	K0018	ADMINISTRATIVE ASSISTANT II	14	EBA

- Save the report as **Positions by Position Type Section V.2**

Now that we have our existing tables placed in the correct sections, we want to add 2 tables to this report. Both Tables will count the number of positions but one will count in the Department Section and the other in the Pos Work Type Section

- From the Report Panel, select Chart and Table Types
- Drag 1 horizontal tables onto the report directly to the left of the Dept Section
- From the Report Panel, select Document Structure and Filters
- Select Document Structures and Filters in the Report Panel. Click on the new table in the Section Pos Dept called Horizontal Table: Block1 then choose format. Under the General table name the Table **Dept Position Count** and in Layout Properties set The left side of this table is **.1 inches** to the Left edge of the section. The top of this table is **.1 inches to the Bottom side of Dept Section Label**. Click OK

- In the Table Dept Position Count Header type **Position Count**. In the body of the table type the formula =**Count([Pos PCN (Def)]).**
- Click on the Dept Position Count table and copy (Ctl+C) and move your cursor to the left of the **Pos Work Type** cell and paste (Ctrl+V).
- Name the table **Work Type Position Count**. In the format for in layout properties set The left of this table is **.2 inches to the Left edge of the Section** and The top of this table is **.1 inches to Bottom side of Position Work Type…** Click OK
- You will need to set the Employee Data table format so it does not interfere with the Work Type Position Count. Set the left of this table is .2 inches to Left edge of section and The top of this table is **.5 inches to Bottom side of =”Position Work Type: “+**

- The beginning of your report should begin like this:

Department: 7 - LABOR & WORKFORCE DEVELOPMENT

Position Count	902

Position Work Type: FACL

Position Count	832

Emp ID	Pos PCN (Def)	Pos Job Class	Pos Job Class Desc	Pos Range	Pos Location Code
189137	075821	K0017	ADMINISTRATIVE ASSISTANT I	12	AWA
230732	071222		ADMINISTRATIVE ASSISTANT I	12	AWA
276671	213115		ADMINISTRATIVE ASSISTANT I	12	JBA
	075040		ADMINISTRATIVE ASSISTANT I	12	DQA
		K0017			

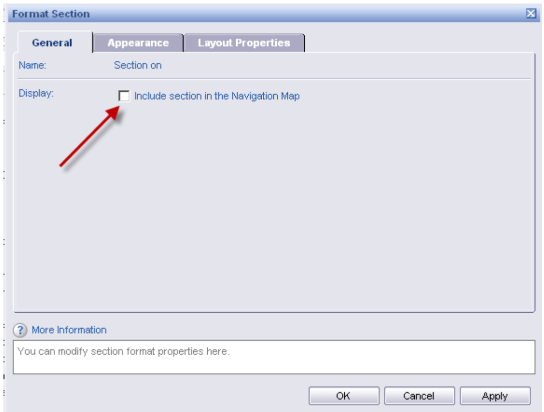
- Notice that the Position Count in the Department Section is not the same as the Position Count in the Position Work Type Section. That is because the Position Work Type count is only for those positions with a Work Type of FACL. If you page through the report you will find other work type sections that have their own work type counts. They will all add up to 902 for Department 7.
- In Document Structures and Filters, your section should now look like:

- Positions by Position Work Type
  - Page Header
  - Page Body
    - Horizontal Table: Selections
    - Section Pos Dept
      - Vertical Table: Dept Section Label
      - Horizontal Table: Dept Position Count
      - Section Pos Work Type
        - Cell: ="Position Work Type: "+[Pos Work Type]
        - Vertical Table: Data Table
        - Horizontal Table: Work Type Position Count

- Save this report as **Positions by Position Work Type Section V.3**

Hide Sections from the Navigation Map:

- In the Report Panel select Navigation Map and expand the first + sign and expand the + sign at 07. Notice that three work types are listed for this report.
- To remove those from the navigation map in the Report Panel, select Document Structures and Filters
- Select section Pos Dept
- Select Format
- Select the General Tab
- Uncheck box include section in the Navigation Map



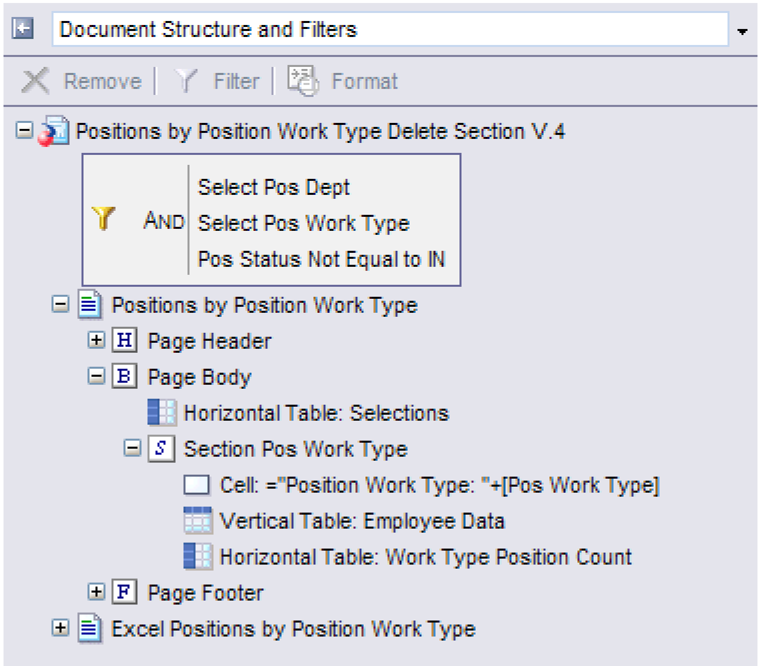
- Click OK
- In the Report Panel, select Navigation Map
- Expand and you will notice that the hidden section with the three work types are no longer displays in the Navigation Map

Remove Sections:

The only place to remove a section is through Document Structure and Filters.

- Click on the Section Pos Dept
- Select Remove from the Report Panel (or right click on the section header)
- Be sure that you want to remove the section
- Click Yes
- Notice that it only removed the section; it did not remove the tables that we added.
- In Document Structure and Filters, right click on the table Dept Position Count
- Select Remove Table
- In Document Structure and Filters, right click on the table Dept Section Label
- Select Remove Table

- Your Report Panel for Document Structure and Filters should look like:



Formatting Sections:

Formatting Sections is extremely handy if you have excess **"White Space"** at the top of the report or between sections. Click on the name of the section in Document Structures and Filters then choose the format button at the top of the panel. From here choose the Layout Properties tab and choose a small fraction of inches to **The Bottom Side of… Selections** and the size of the white space should decrease.

Save the report in your *Class Exercises* as **Positions by Position Work Type Section Delete V.4**

Review:

1. What are the 3 different types of sorts?

2. How are they applied?

3. What are 3 ways that you can apply a break?

4. What are 3 ways that you can apply a table sort?

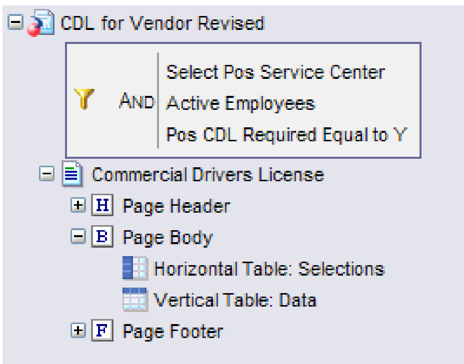
5. What do you have to do AFTER you define a custom sort?

6. How can you easily identify that a Break has been applied to the data table?

7. What is the benefit of setting a section?

Exercise:

1. Find **CDL for Vendor Revised** in your Inbox, copy it to your *Class ALDER 101* folder and open it from there.
2. Maximize your real estate
3. Refresh Data:
   - Report Effective Date: 7/1/2010
   - Report Point in Time Date: 7/1/2010
   - Service Center: 0
4. You will get a pop up display that says there is no data. Click OK. You will want to rename tables and sections with no data
5. Go to Document Structure and Filters
6. Your Document Structure and Filters should look like:



7. Identify and rename the vertical data table to **CDL Detail**. Be sure that you visually identify each table within the report.
8. Refresh Data:
   - Report Effective Date: 7/1/2010
   - Report Point in Time Date: 7/1/2010
   - Service Center: PUBLIC PROTECTION

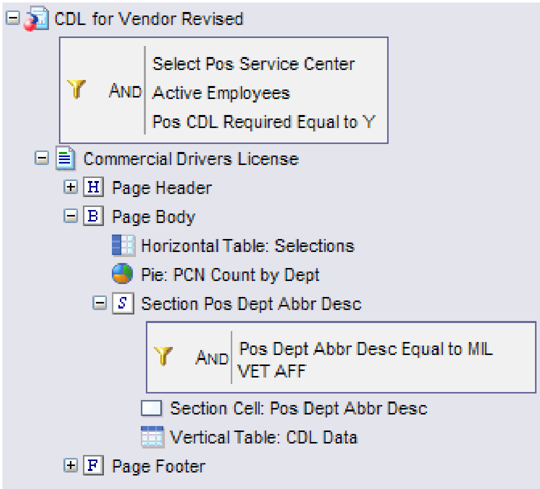
   (NOTE: Recommend to use List of Values for the Service Center)

9. Click on the department name (1st column) and set it as a section.
10. Move the org code to the first column and insert a break and center the footer in the cell.
11. Count the PCNs in each break and center the count in the cell.
12. Make a variable from PCN Count in each section and name it Position Count
13. Create a pie chart to show PCN Count by Dept for the entire report.

    Hint: Use your new variable PCN Count.
14. Filter the section called Pos Dept Abbr Desc for only Military and Veterans' Affairs

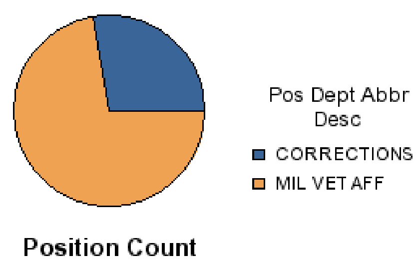
    Hint Click on the section label and apply the filter
15. Under Document Structure and Filters rename the Pie chart PCN Count by Dept
16. Add a row to the Selection Box to show that a table filter for Mil Vet Aff

17. Your Document Structure and Filter should look like:



18. Verify that the report begins like:

Report Effective Date	12/24/2008
Report Point in Time Date	12/24/2008
Service Center(s)	PUBLIC PROTECTION
Section Filtered by	Dept = Mil Vet Aff



MIL VET AFF

Pos Org Code	PCN	Emp Name	EE ID	Pos Location	Pos Region	Pos Class Desc	Emp Season Ind
09500002	090016	STASER,GREGORY J	256072	EBG	50	MAINT GEN (F/L/J/SJ)	FR
	090019	FERGUSON,DAVID B	292486	EBG	50	MAINT GEN (F/L/J/SJ)	FR
	090028	PEPLOW,TODD A	273956	EBG	50	MAINT SPEC ETRICIAN	FR
	090029	MILLER,CHARLES R,,JR	299388	EBG	50	MAINT SPEC BFC (F/L/J/J)	FR
	090099	MCMILLAN,PATRICK L	268256	EBG	50	EQUIP OPERATOR (F/L/J/J/SJ)	FR
	090119	HARRELL,TRAVIS	294904	EBG	50	MAINT GEN (F/L/J/SJ)	FR
	090191	BURR,JOHN E	286819	EBG	50	STOCK & PARTS SVCS (L/J/SJ)	FR
09500002	7						

Pos Org Code	PCN	Emp Name	EE ID	Pos Location	Pos Region	Pos Class Desc	Emp Season Ind
09500003	090364	DUVAL,BRYAN B	100262	JBV	50	EQUIP OPERATOR (F/L/J/J/SJ)	FR
	090365	LEFFINGWELL,BRIAN J	265436	JBV	50	EQUIP OPERATOR (F/L/J/J/SJ)	FR
09500003	2						

19. Save to you *Class Exercise* folder as **CDL for Vendor Revised Final Exercise**

APPENDIX:

Chapter 4 – Review Question Answers

1. **How do you open a report to view it?**

   In the Workspace Panel click on the name of the report to open it.

2. **What is the difference between viewing a report in Page Mode vs. Draft Mode?**

   When you are in Page Mode, you can see headers and footers, and data is displayed by page. When you are in Draft Mode, you cannot see the headers and footers, and all the data is displayed continuously - there are no pages. Draft mode is best for using the Find function, as you can find the item throughout the entire document. Page Mode only allows you to find data on the page you are currently on.

3. **In ALDER, how can you print a report?**

   You can print a report from ALDER two different ways:
   a. In the Workspace Panel, Select Document, Save to My Computer As and select PDF, or
   b. In the Workspace Panel, Select View, and select PDF mode

4. **Identify the 3 different ways that you can Save to My Computer As and why you would use each.**

   The following are three different ways you can save a report to your computer and why you would use them:

   - PDF – This provides a snapshot of the report in Adobe Acrobat that cannot be altered. This is also the only way a report can be printed.
   - Excel – This downloads the report into Excel and it looks like a Web Intelligence report, with headers, footers, and formatting. However, since it is formatted it would be difficult to do additional sorting and formatting.
   - CSV – This is comma separated values. Every available object is downloaded into a column in Excel. This not only downloads the objects that are on the face of the Web Intelligence report, but it includes all available objects. This format would be ideal for sorting and new formatting.

5. **What are the 2 different ways to maximize your real estate?**

   Option 1:
   - The maximize and minimize button on the blue workspace toolbar
   - F11 to minimize the Internet Explorer Toolbars

   Option 2:
   - Toggle the Navigation Panel closed
   - Select the up-arrow to Hide the Header Panel in the blue workspace toolbar
   - F11 to minimize the Internet Explorer Toolbars

6. **What are the standard report elements?**

   Standard report elements include: ALDER logo, title of the report on the top and bottom of the report, last refreshed date, and page numbering.

7. **What are the 2 ways that you can activate/inactivate your toolbars?**

   There are two ways to inactive or activate toolbars in the workspace:
   - From the workspace toolbar click on View, Toolbars, and select the toolbars needed
   - From the workspace toolbar right-click in the gray space and then select the needed toolbars

8. **When is the only time that you have a "SAVE" button?**

   The Save button appears on the workspace toolbar when you have opened a report from your My Folders.

Chapter 5 – Review Questions Available Objects

1. **What is an Available Object?**

   Listing of information that is available to be displayed on the report. Information is categorized in 3 different types of objects.

2. **Are all Available Objects Displayed on the report?**

   Not all Available Objects are displayed on the report.

3. **What are the different types of available objects?**

   There are three different types of objects:
   - Dimensions
   - Details
   - Measures

4. **What is the difference between a variable and a formula?**

   A formula is a calculation that is created to display data that is not retrieved by existing objects. A variable is an available object created from a formula that exists only for the report you are in. A variable can be dragged onto the report and used multiple times and within other formulas.

Chapter 5 – Review Questions Charts and Table Types

1. **What type of chart, table, or cells exist on all ALDER Reports?**

   All Alder reports include a Horizontal Table for the (also called the Selection Box) information and a Vertical Table to house the data. Additionally, Cells are used for information such as headers and footers.

2. **What are the 3 different formats to display data and what are the differences?**

   Tables –displays summary or detail information

   Cells – adds meaning to the report through text, formulas or calculations, page numbers, etc

   Charts – graphically displays business information based on the chart criteria

3. **What are the 2 area's that you can display charts, tables, or cells?**

   Reports are made up of two main areas: the Page Body (or also called the Report) and Sections within a report. Charts, tables, and cells can be housed in either area.

4. **How do you display a chart title?**

   To display a chart title you need to format the chart: right-click on the chart, format, and in the General Tab, check the box "Show chart title." Then in the Appearance tab you can place a title on the chart.

Chapter 6 – Review Questions

1. **How are Filters defined?**

   Filters are defined on dimensions, details, measures, and variables.

2. **Why would you apply a filter to a table or chart instead of the entire report?**

   It's preferred to apply a filter on the entire report; however, if you only wanted a chart on data within a certain table, then you'd apply a table filter. Be cautious, if you are including totals in the report, it will not take into consideration the filtering on the single table.

3. **What are the different types of filters?**

   There are three different types of filters:
   - Query Filters, which are applied by a Report Developer. These are your prompts.
   - Report Filters, which are applied to the entire report.
   - Table Filters, which are applied only to a table.

Chapter 9 – Review Questions

1. **Where can you find help to define and use functions?**

   Functions are used within a formula. The Formula Editor lists all functions that are available in ALDER. Information can be found in three places:
   - In the Formula Editor, click on the function and read the description that is populated.
   - Excel help resources. ALDER uses formulas the same as with Excel, with the exception of replacing the comma with a semi-colon. You can use the internet, excel books and software.
   - ALDER Help from the Home page.

2. **What is the difference between a formula and a variable?**

   A formula is a calculation that is created to display data that is not retrieved by existing objects. A variable is an available object created from a formula that exists only for the report you are in. A variable can be dragged onto the report and used multiple times and within other formula.

3. **What are the 4 areas in the Formula Editor and what are they used for?**

   There are four areas to the Formula Editor as follows:
   - Formula: This houses the actual formula
   - Available Objects: This houses all objects that are available in the report
   - Available Functions: This houses all functions that are available in ALDER
   - Available Operators: This houses all operators that are available in ALDER

4. **Why would you create a variable?**

   You would want to create a variable, rather than continue to type a long formula multiple times making it easier for you. Variables can easily be dragged onto a report for use. Additionally, you may want to use a formula within a formula and by utilizing a variable the formula would be smaller.

Chapter 10 – Review Questions

1. What are the 3 different types of sorts?

Sorts are applied in three different ways, by Table, Break, and Sections

2. How are they applied?

Sorts are applied as follows:

- Sections are applied first to a group of data (objects) for the entire report. Sections remove data (an object) from the tables and place it at the top of a section.
- Breaks are applied second to all the data in a report. In addition to sorting the data, a Break also provides a visual aid to make data easier to read.
- Table sorts are applied last to columns in a data table. The data is sorted in the order in which you applied the first sort.

3. What are 3 ways that you can apply a break?

There are three ways to apply a Break:

- Right-click on the data column, select Break, Insert
- On the Report toolbar, select Break
- On the Workspace toolbar, select Insert, Break

4. What are 3 ways that you can apply a sort?

There are three ways to apply a Table Sort:

- R-click on the data column, select Sort, then select the order in which you would like it sorted
- On the Report toolbar, select Sort and the order in which you would like it sorted
- On the Workspace toolbar, select Insert, Sort, then select the order in which you would like it sorted

5. What do you have to do AFTER you define a custom sort?

After you define a custom sort, in order to use it you must apply it.

6. How can you easily identify that a Break has been applied to the data table?

You can easily identify that a Break has been applied, as it also applies a visual aid – the data is not repeated within a break. It leads with the data, and then subtotals at the end.

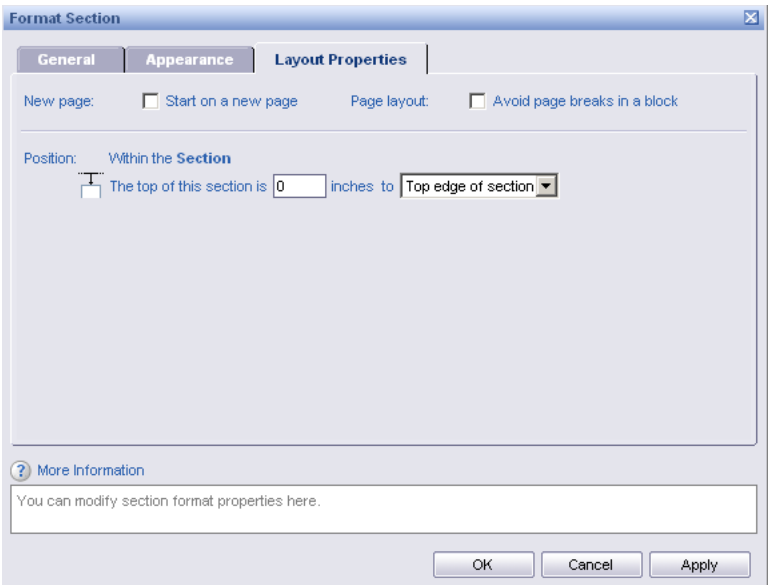
7. What is the benefit of setting a section?

A benefit of setting a section allows the use of the Navigation Map in your Report Panel. You can easily navigate through your report. Additionally, it is also very helpful visually on the face of the report.

Section Formatting

When Formatting Sections, always start with the bottom most section within the Report Outline in Document Structures and Filters. Make sure that all of the tables within each section are placed where you want them.

- Select Format
- Select Section
- Select the Layout Properties tab in the pop-up box
- Make the Top of this section 0 (zero) inches to Top edge of section



- Click OK
- Repeat this formatting for each section as you "walk-up" the Document Structures & Filters report outline.

NOTE: **You may need to re-position tables within each section to remove all excess white space. The steps listed above may need to be repeated after you re-position tables.**

Available Functions

Often users need to build additional calculations or objects into a report beyond the report's base objects or calculations.

Web Intelligence has seven categories of Available Functions:

Category	Description
All	All the functions for all the categories listed below in this table.
Aggregate	Aggregates data (for example by summing or averaging a set of values)
Character	Manipulates character strings
Date and Time	Returns date or time data
Document	Returns data about a document
Data Provider	Returns data about a document's data Provider
Logical	Returns TRUE or FALSE.
Numeric	Returns numeric data
Misc	Functions that do not fit into the above Categories

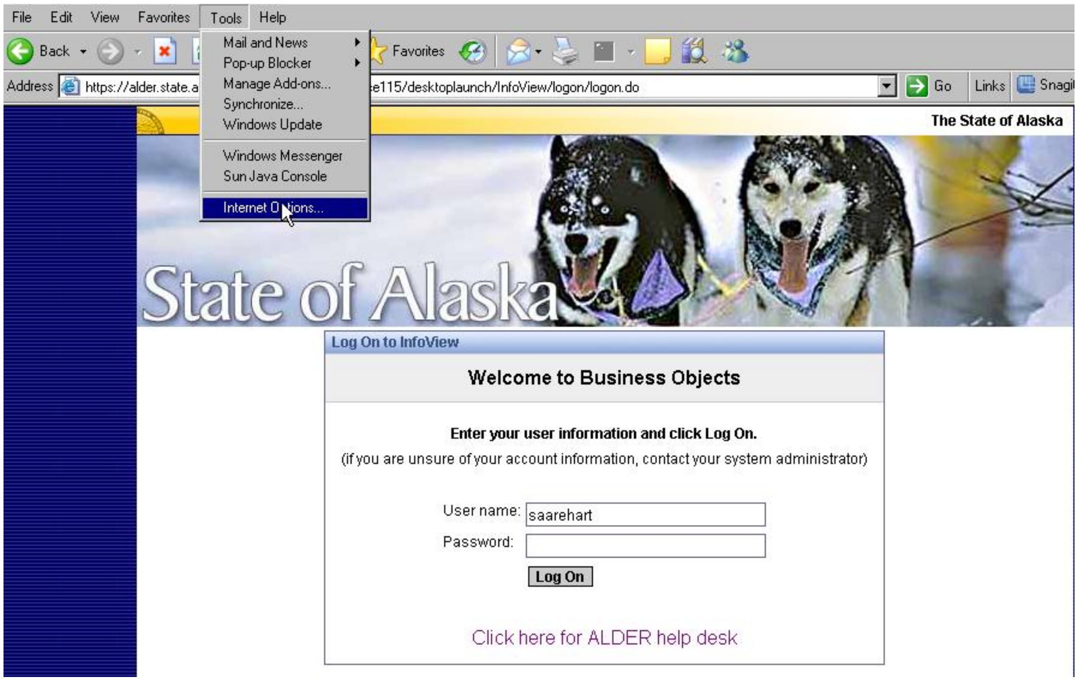
Setup IE Browser Internet Options - Overview

The browser supported by ALDER is Microsoft Internet Explorer (IE) Version 6.0 SP2 and requires a number of internet options to be set in order for it to function properly. Internet Options that should be verified and/or set are:

1) https://alder.state.ak.us should be a trusted site.
2) Enable file download to allow reports to be saved to the desktop for use with MS Excel.
3) Allow pop-ups from *.state.ak.us domain.
4) Adobe must be set to display a PDF within the browser.

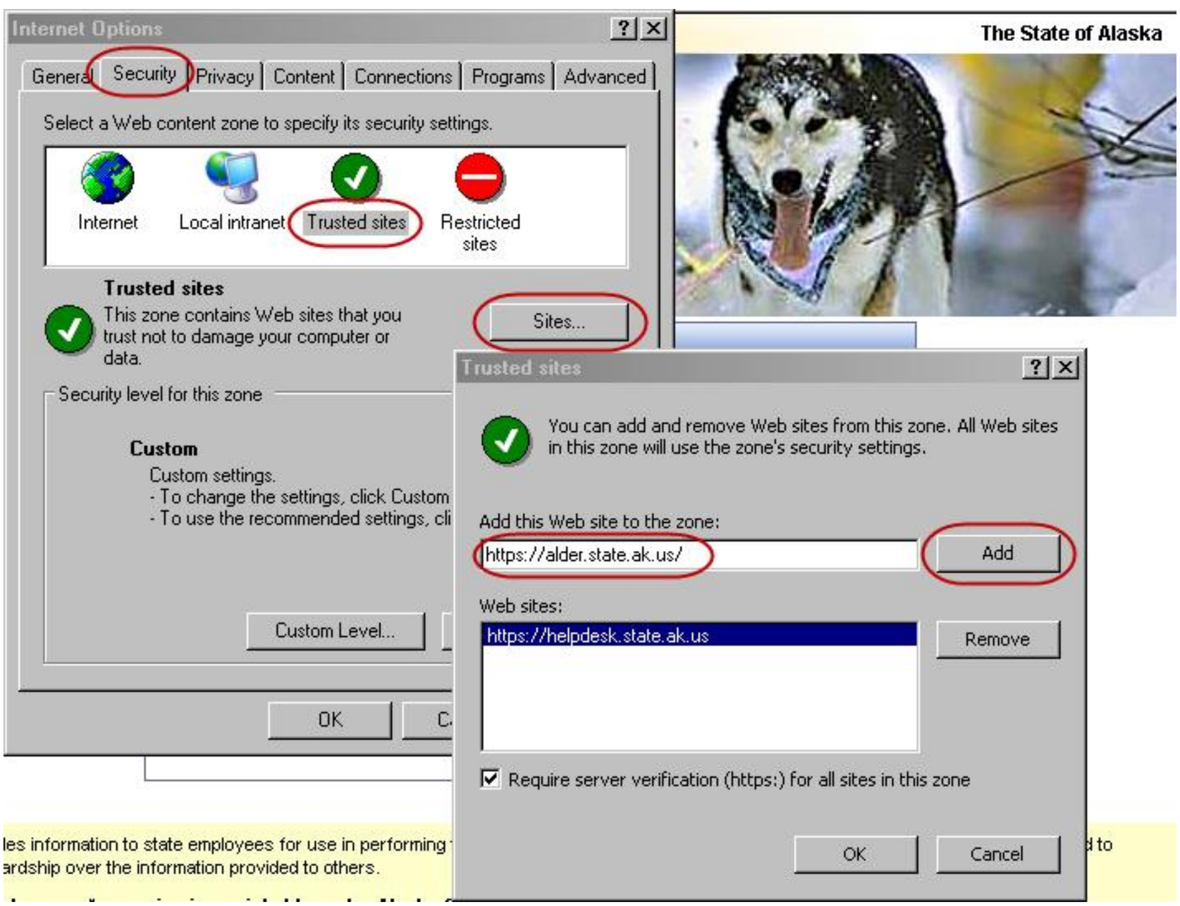
Note: Although later version of IE (version 7.0 and/or 8.0) and other browsers may function properly they are not currently certified with the underlying application that is installed for the ALDER data warehouse. Similar internet option settings should be required for the later versions, however the ALDER team is unable to support or troubleshoot any browser functional problems that may arise with non-certified browser versions.

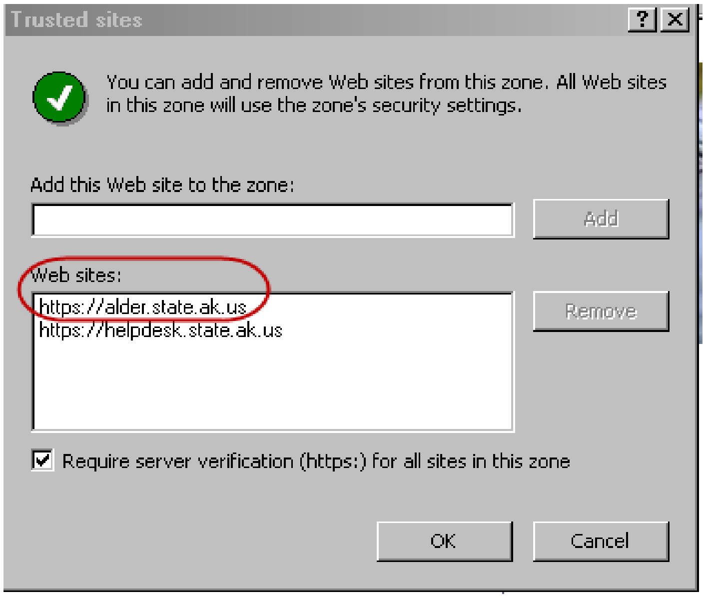
Start by selecting Tools – Internet Options to confirm that each of these parameters is set correctly.



Trusted Site

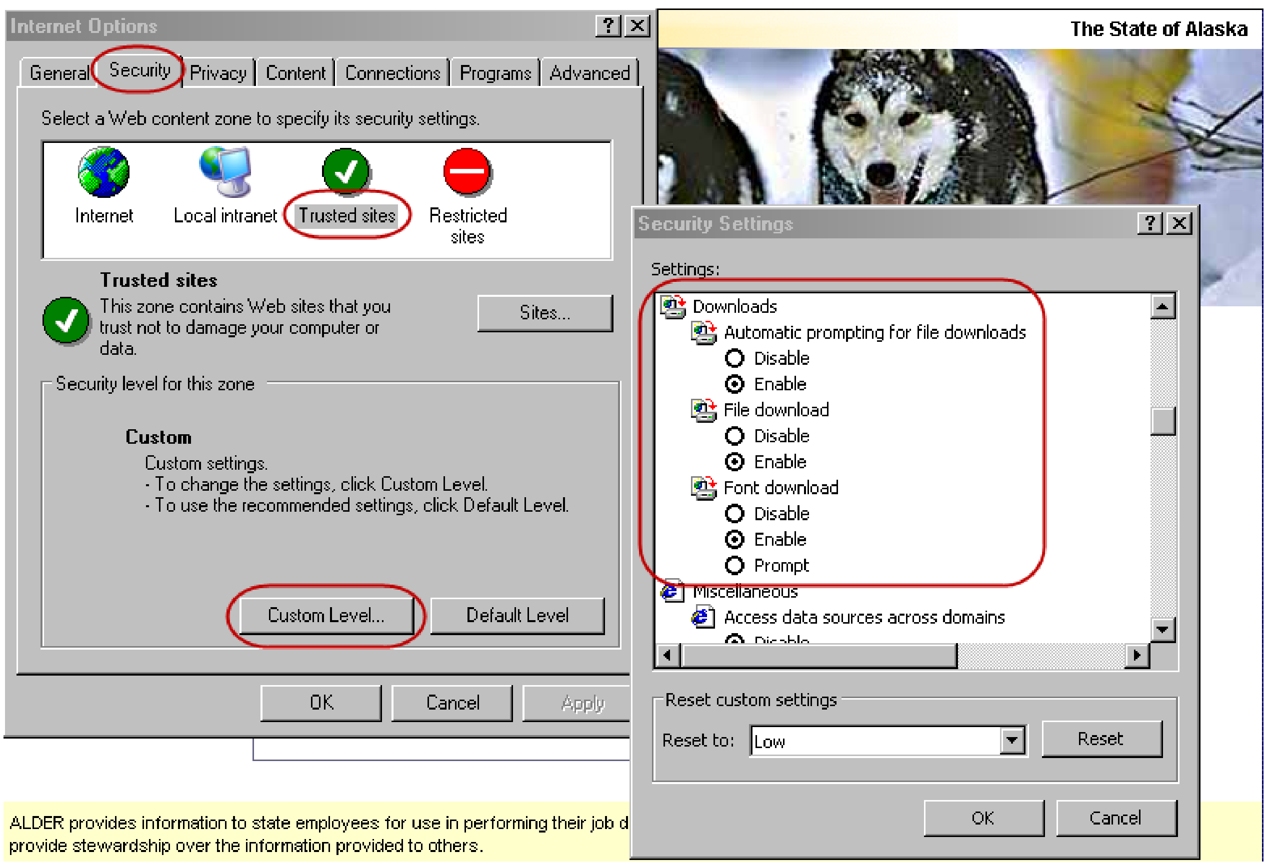
Select Security tab – Trusted Sites – Sites and determine if https://alder.state.ak.us is a trusted site. If ALDER is not a trusted site then type https:/alder.state.ak.us and add it to the zone.





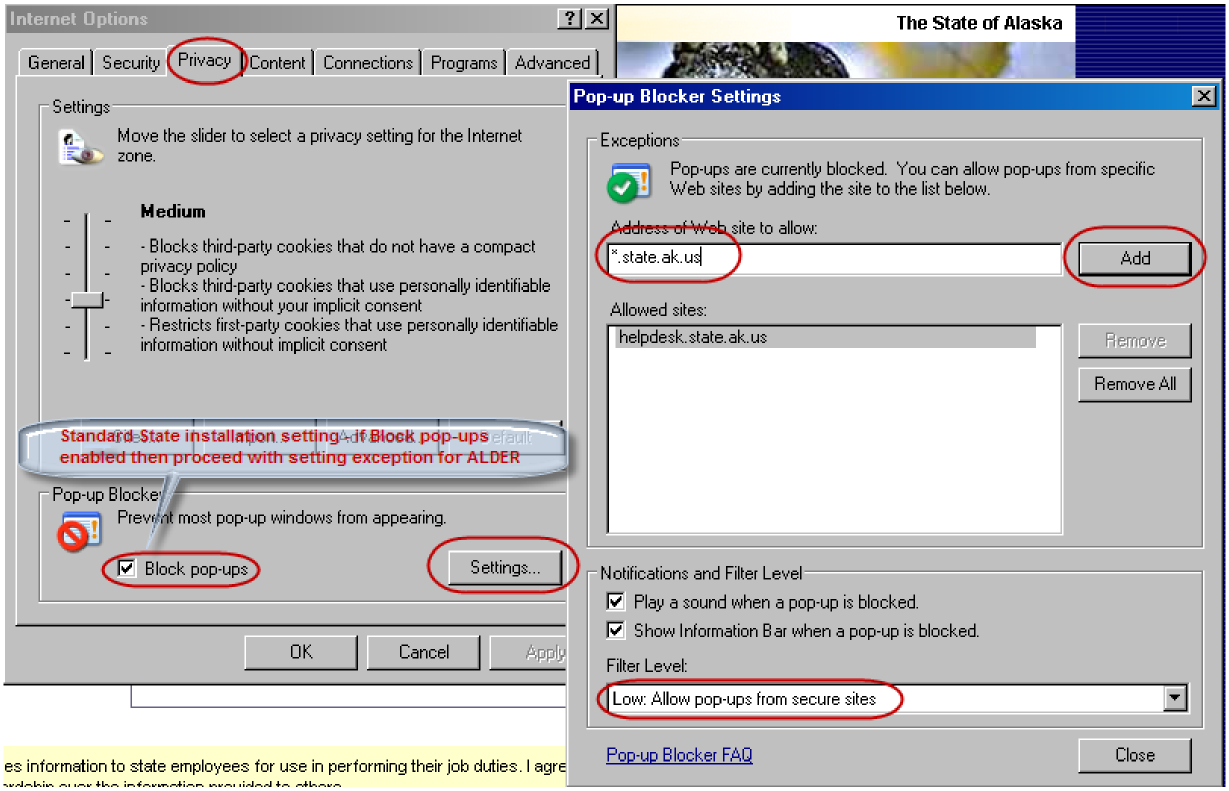
Allow Download to the Desktop

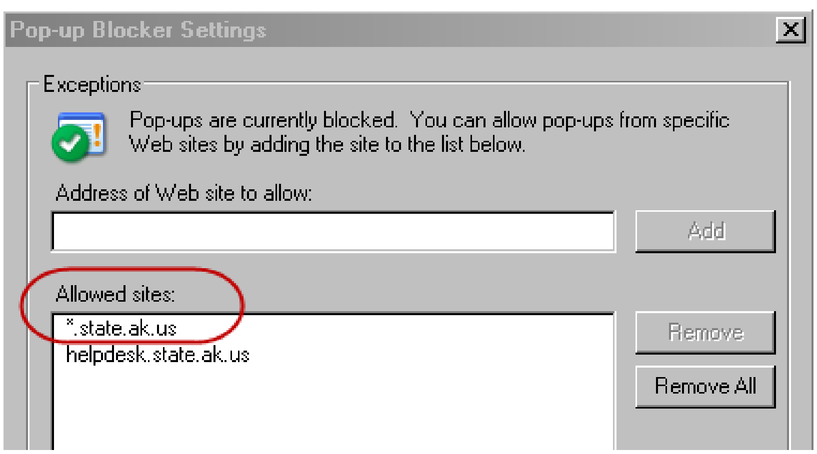
Select Security tab – Trusted sites - Custom Level and scroll down to the Downloads setting. Verify and/or set the Enable setting for the three options.



Allow Pop-ups from *.state.ak.us

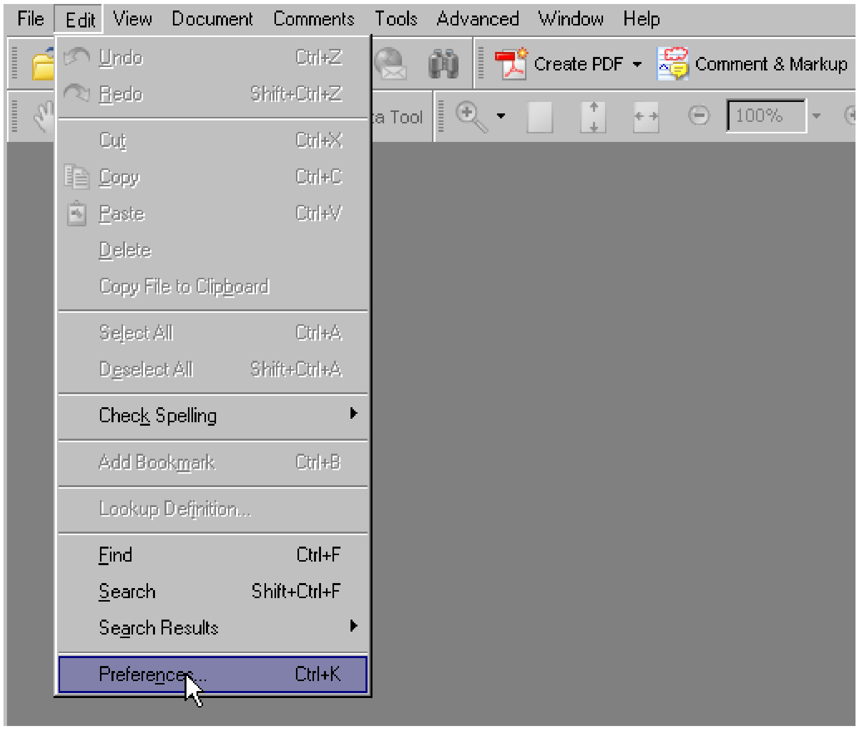
Select Privacy tab and determine if Pop-up Blocker is active. If it is active, enterprise default installation, then an exception must be added so that ALDER functions normally. Proceed by selecting Settings and adding *.state.ak.us as a site that pop-ups are allowed.

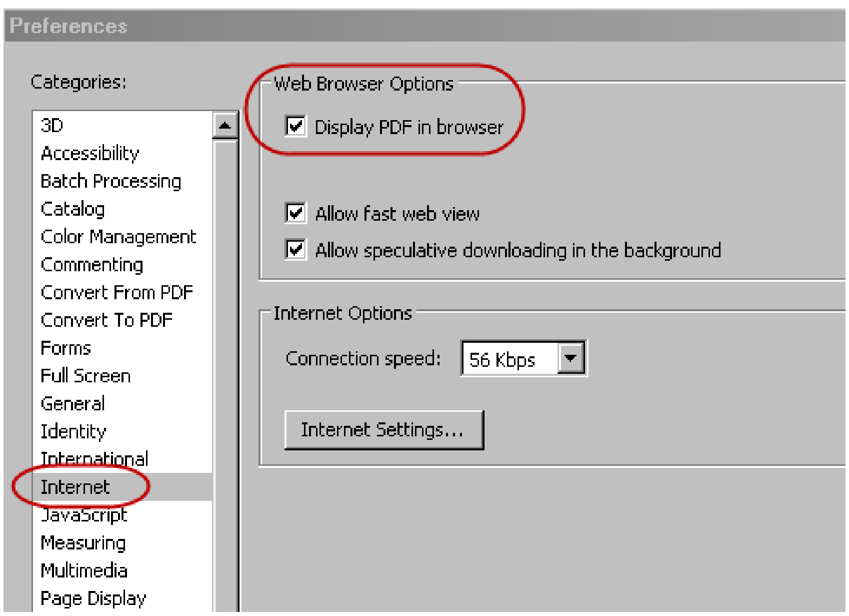




Display PDF within Browser

After starting the Adobe application select Edit – Preferences – Internet category to verify that the Web Browser Option ‘Display PDF in browser’ is enabled.





Available Operators

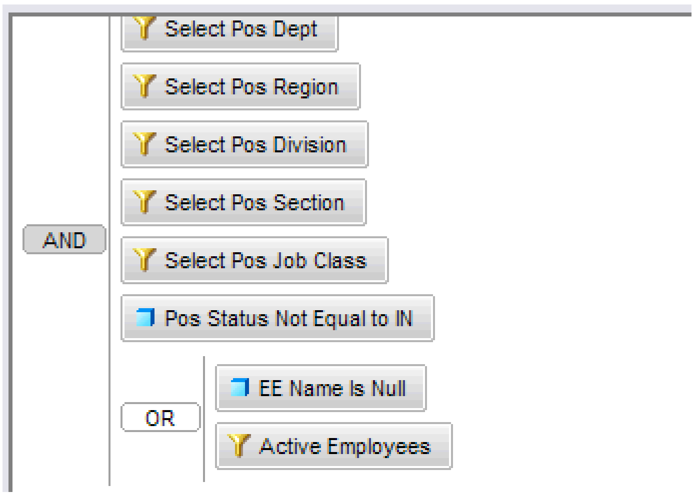
The tool provides the use of operators for both query and report filters, calculations and formulas during the creation or modification of a report. The table below lists the operators available and provides an example of each operator in the context of a business question:

To obtain data...	For example...	Select...	To create the filter...

equal to a value a user specifies,	retrieve data for the US only,	**=**	**Equal to**	[Country] Equal to US.
not equal to a value a user specifies,	retrieve data for all countries other than the US	**!=**	**Not equal to**	[Country] Not Equal to US
greater than a value a user specifies,	retrieve data for customers aged over 60,	**>**	**Greater than**	[Customer Age] Greater than 60
greater than or equal to a value a user specifies,	retrieve data for revenue starting from $1.5M upward,	**>=**	**Greater than or equal to**	[Revenue] Greater than or equal to 1000500
lower than a value a user specifies,	retrieve data for exam grades below 40,	**<**	**Less than**	[Exam Grade] Less than 40
lower than or equal to a value a user specifies,	customers whose age is 30 or less,	**<=**	**Less than or equal to**	[Age] Less than or equal to 30
that falls between two values a user specifies and includes those two values,	weeks starting at week 25 and finishing at 36 (including week 25 and week 36),		**Between**	[Weeks] Between 25 and 36
that falls outside two given values a user specifies,	all the weeks of the year, except for weeks 25 through 36 (week 25 and week 36 are not included),		**Not Between**	[Weeks] Not Between 25 and 36
the same as several values a user specifies,	user only wants to retrieve data for the following countries: the US, Japan, and the UK,		**In List**	[Country] In list 'US; Japan; UK'
different from the multiple values a user specifies,	user does not want to retrieve data for the following countries: the US, Japan, and the UK,		**Not in list**	[Country] Not in list 'US; Japan; UK'
that includes a specific string,	customers whose date of birth is March 1972,		**Matches Pattern**	[DOB] Matches pattern, '72'
that doesn't include a specific string,	customers whose names do not begin with S,		**Different from Pattern**	[DOB] Different from pattern, 's'
that corresponds to two values a user specifies,	customers who have both a fixed telephone and a mobile phone,		**Both**	[Account Type] Both "fixed" and "mobile"
that corresponds to all values a user specifies	customers who have a fixed telephone, mobile phone, and fax phone		**** AND**	[Account Type] "fixed" AND "mobile" AND "fax"
that corresponds to a value a user specifies	customers who have a fixed telephone, mobile phone, or fax phone		**** OR**	[Account Type] "fixed" OR "mobile" OR "fax"
that corresponds to one value a user specifies and does not correspond to another value a user specifies	customers who have a fixed telephone, but don't have a mobile phone,		**Except**	[Account Type] "fixed" Except "mobile"

**** AND** – Returns data ONLY when ALL of the criteria is TRUE
**** OR** – Returns data when ANY of the criteria is TRUE

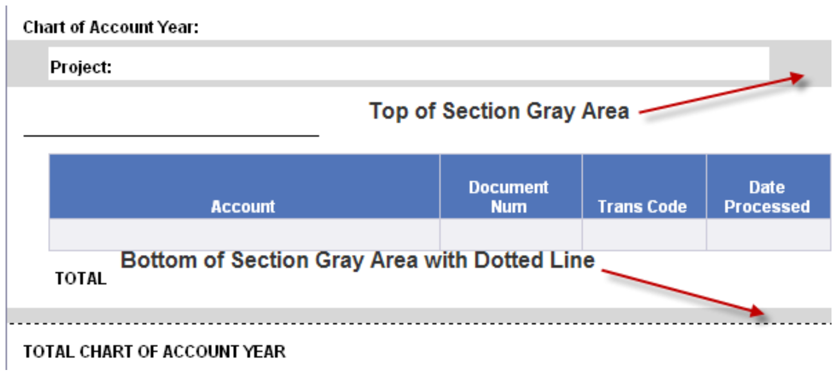
Additional Example of Nested Filters:

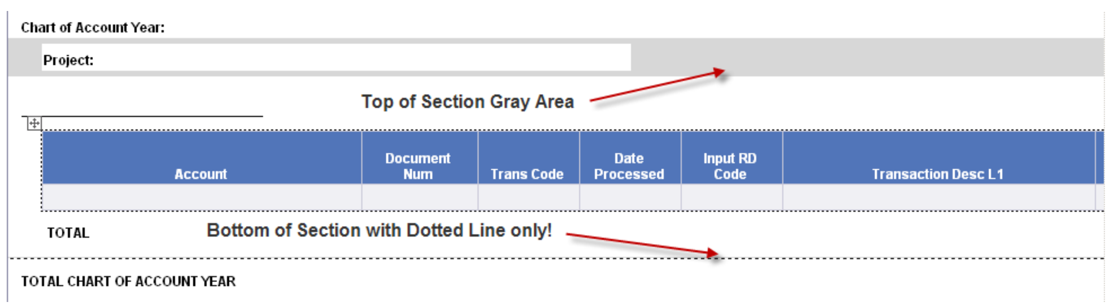


Moving a Table

The directions below will help you move a table. This information is from the Accounting ALDER 101 User Guide

Moving a Table

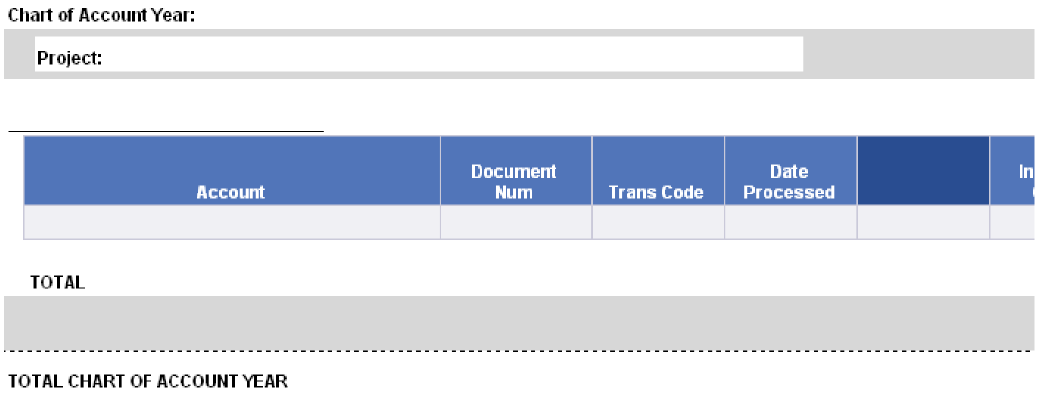
- In Document Structure and Filters, click on the Section Project Extended Name
- Notice in the report the area behind the table Project Header is highlighted as gray and above the table COA Yr Total is highlighted gray.
- Also, notice that there is a dotted line that goes across the report between the tables Project Total and Chart of Account Year Total.
- 

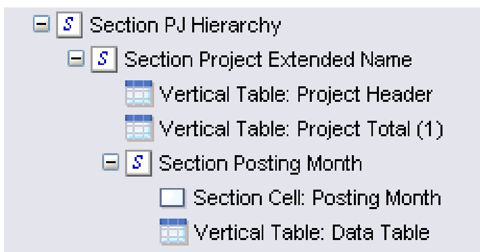
- If the **"Bottom Section"** does not have a Gray Area, we will need to drag the dotted line down to show the bottom of the section which is "hidden".
- 

- **WARNING: ONLY drag the dotted line down if you do NOT have a gray area. Be very careful to only drag the line down about quarter of an inch. You just want to make a little bit of space. If you drag the dotted line down to far, formatting becomes very difficult!!! (you may spill the section onto the second page of the report)**

- **When you click on the dotted line, you need to make sure that the area behind the data table does not turn gray!**

- Click on the dotted line, hold your mouse button down and drag the line down just a little bit.
- Let go of your mouse.
- You should now have 2 gray areas on your report

- 

- In Document Structure and Filters, click on the table named "Project Total"
- Locate the table in your report
- Hover over the table until it is outlined
- Click and hold on the cross box in the upper left-hand corner of the table
- Drag the table down to the bottom gray area
- Release the table
- Your Document Structure and Filters should now look like:
- 

- Drag the dotted line up to be directly beneath the Project Total table

Available Operators to AVOID

Some operators can create confusion when used in a report and should not be used!

- Section
- Block
- Body
- Report
- Row
- Column
- User Response

Standard Calculations:

Standard calculation functions can be used to make quick or standard business calculations on the data in Web Intelligence reports. These calculations are available from the Calculations list on the Report toolbar. Customized functions and formulas can be applied to more advanced calculations on the data as well. Users can utilize the following standard calculations:

Calculation Type	Icon	Use to…
Sum	Σ	Calculate the sum of the selected data.
Count	n	Count all rows for a measure object or count distinct rows for a dimension or detail object.
Average	$\bar{x}$	Calculate the average of the selected data.
Minimum	>x	Display the minimum value of the selected data.
Maximum	<x	Display the maximum value of the selected data.
Percentage	%Σ	Display the selected data as a percentage of the total. The results of the percentage are displayed in an additional column or row of the table.

ALDER Key Terminology

Available Objects Data elements that are available to use in a report but do not require re-executing or refreshing the report.

Business Objects Business Objects is the manufacturer of InfoView and Web Intelligence software which ALDER uses.

Enterprise Reports Reports developed for statewide use. They can be copied and customized to meet your agency's needs.

InfoView The portal for ALDER that collects, consolidates, and presents data and reports.

Measure Retrieves numeric data that is the result of calculations on data in the database.

Objects An element in the universe that corresponds to a selection of data in the database. The name of an object is usually derived from the business terms.

Prompt A prompt is a dynamic filter that displays a question every time data is refreshed in a report. The prompts are answered by either typing or selecting the value(s) to be viewed. Web Intelligence retrieves only the values specified.

Query A query is a request for data from a database or other source. A user builds a query containing "objects" from a "universe". If the data is available, the requested data is returned usually in the form of a table or a chart.

Refresh Refreshing reports ensures that you are viewing the most recent data available in the database.

Report A report is the data output from a query that has been executed or refreshed. It includes data returned from the query, as well as formatting applied to the data to make the data more readable for end users.

Report Filter Report filters are applied to the data retrieved by a query that limit the values displayed in the report. Each report can be filtered to display a different subset of the same data depending on the user requirements.

Schedule Scheduling a report allows the report to run automatically at specified times. When a scheduled report runs successfully, an "instance" is created.

Template Reports Blank reports which include the standard report elements (logo, page numbers, last refresh date, etc.).

Universe A universe is a logical group of data tables used for reporting. Universes provide an easy to use and understand interface for non-technical Web Intelligence users to run queries against a database to create reports and perform data analysis.

Web Intelligence A Business Objects tool that allows users to create queries and reports to analyze data.

Definitions of User Roles and Capabilities

Group	Course	Capabilities	Prerequisites
Report Recipients	None	• Receive an Excel or PDF report (file)	None
Report Viewers	ALDER 100 Online	• Run, refresh and schedule reports in enterprise, department internal, public, favorites, and user's inbox folders • Receive sections of scheduled reports • Change prompt values for a report to limit the results displayed, but cannot change report layout	Increment 1: Some knowledge of structures and financial data. Increment 2: Some knowledge of payroll data
Interactive Users	ALDER 101 (1 1/2 – 2 days)	Same capabilities as Report Viewers, **plus** the ability to: • Drag and drop fields onto a report from a list of objects • Change the sort, filter, and add new sections and breaks to a report • Create different views of data (e.g., charts)	ALDER 100 AND Good working knowledge of payroll data Incr 1: ALDER 100 AND Intro to AKSAS, OR Good working knowledge of structures and financial data
Report Developers	ALDER 201 (2 days)	Same capabilities as Interactive Users, **plus** the ability to: • Create new reports • Perform quality assurance and certify developed reporting prior to being deployed • Develop agency-specific ad-hoc reports	ALDER 101
Agency Advocates	ALDER 201 (2 days)	Same capabilities as Report Developers, **plus** the ability to: • Responsible for the two-way communications between the department and the ALDER Project Team • Serve as the first line of help desk support for department ALDER users • Responsible for maintaining department folder structure within ALDER	ALDER 101