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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
Accessing ALDER Web-Page
Sign into ALDER
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

<table>
<thead>
<tr>
<th>Preferences</th>
<th>General</th>
<th>Desktop Intelligence</th>
<th>Web Intelligence Document</th>
<th>OLAP Intelligence</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Select a view format:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HTML</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interactive</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Portable Document Format (Adobe Reader required)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Select a report panel:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Query - HTML</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HTML Report Panel</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- 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

Creating a New Folder

Copying Reports while creating a New Folder

Move a Report and Delete a Folder
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 Counts 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 Counts 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 When and notice the options of scheduling reports. We will select “Now”.
  o 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.
  o 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.
  o When you choose these you will be able to choose a day and time.
  o 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.
  - 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.

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.
• **Prompts** 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.

  **Summary:**

  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](image)

- The second method is to close the Report Panel.

**Definition of Buttons:**

<table>
<thead>
<tr>
<th>Button/Drop Down List</th>
<th>Options</th>
<th>Function in ALDER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document</td>
<td>Close</td>
<td>Closes the report</td>
</tr>
<tr>
<td></td>
<td>Edit</td>
<td>Not allowed for Interactive Users</td>
</tr>
<tr>
<td></td>
<td>Save</td>
<td>Opens the Save Document Panel</td>
</tr>
<tr>
<td></td>
<td>Save as</td>
<td>Opens the Save Document Panel (See directions to disable Pop-up Blocker)</td>
</tr>
<tr>
<td></td>
<td>Save to my computer as</td>
<td>Allows the User to extract the data to Excel, Adobe, or a CSV File</td>
</tr>
<tr>
<td></td>
<td>Properties</td>
<td>Opens the property pane for the current report</td>
</tr>
<tr>
<td>View</td>
<td>Page mode</td>
<td>Shows how the report looks with headers and footers and the number of pages in the report</td>
</tr>
<tr>
<td>------</td>
<td>-----------</td>
<td>---------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>Draft mode</td>
<td>Shows the report with no headers or footers and is one continuous page</td>
</tr>
<tr>
<td></td>
<td>PDF mode</td>
<td>Shows how the report will look in Adobe and allows the user to print the report from inside of ALDER</td>
</tr>
<tr>
<td>Left panel</td>
<td>Opens and Closes the “Report” Panel</td>
<td></td>
</tr>
<tr>
<td>Status Bar</td>
<td>Opens and Closes the status bar at the bottom of the Workspace Panel</td>
<td></td>
</tr>
<tr>
<td>Toolbars</td>
<td>Opens and Closes individual toolbars within the Workspace Panel</td>
<td></td>
</tr>
<tr>
<td>Preferences</td>
<td>Sets User Preferences for all reports</td>
<td></td>
</tr>
<tr>
<td>Insert</td>
<td>New row</td>
<td>In Table – Inserts a New row above or below the current row selected</td>
</tr>
<tr>
<td></td>
<td>New column</td>
<td>In Table – Inserts a New column to the left or right of current column</td>
</tr>
<tr>
<td></td>
<td>Break</td>
<td>In Table – Adds or Removes a break to the data</td>
</tr>
<tr>
<td></td>
<td>Filter</td>
<td>On the report or in a table, applies a user defined filter</td>
</tr>
<tr>
<td></td>
<td>Sort</td>
<td>In Table – Applies or removes ascending, descending, or custom sorts</td>
</tr>
<tr>
<td></td>
<td>Calculation</td>
<td>In Table – Applies a calculation at the Break in the data</td>
</tr>
<tr>
<td><img src="save.png" alt="Save" /></td>
<td></td>
<td>This button is only available when the user has opened a report within their My Folders structure</td>
</tr>
<tr>
<td><img src="find.png" alt="Find" /></td>
<td></td>
<td>Page Mode – Only searches for information on the current page</td>
</tr>
<tr>
<td></td>
<td>Draft Mode – Searches the entire report</td>
<td></td>
</tr>
<tr>
<td><img src="undo.png" alt="Undo" /> <img src="redo.png" alt="Redo" /></td>
<td></td>
<td>Allows User to Undo or Redo previous actions</td>
</tr>
<tr>
<td><img src="zoom.png" alt="Zoom" /></td>
<td></td>
<td>Allows User to Zoom in or out of data for viewing purposes</td>
</tr>
<tr>
<td><img src="refresh.png" alt="Refresh Data" /></td>
<td></td>
<td>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</td>
</tr>
<tr>
<td><img src="refresh.png" alt="Refresh Data" /></td>
<td></td>
<td>Allows the User to refresh data or change the prompts for the report to get different data.</td>
</tr>
<tr>
<td><img src="refresh.png" alt="Refresh Data" /></td>
<td></td>
<td>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</td>
</tr>
</tbody>
</table>
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:

![Toolbars Image]

**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
**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:
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:

<table>
<thead>
<tr>
<th>ARTSTATE COUNCIL ON THE ARTS</th>
<th>PER</th>
<th>Permanent Employees</th>
<th>Nonperm Employees</th>
<th>Employees - not Permanent or Nonperm</th>
<th>Total Employees</th>
<th>Filled Positions</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADMIN ASS'T II</td>
<td>PE</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>ADMINISTRATIVE CLERK III</td>
<td>PE</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>EXEC DIR COUNCIL OF ARTS</td>
<td>PE</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>FINE ARTS ADMINISTRATOR II</td>
<td>PE</td>
<td>2</td>
<td>0</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EDUCATION SUPPORT SERVICES</th>
<th>PER</th>
<th>Permanent Employees</th>
<th>Nonperm Employees</th>
<th>Employees - not Permanent or Nonperm</th>
<th>Total Employees</th>
<th>Filled Positions</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACCOUNTING SRV  II</td>
<td>TT</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>ACCOUNTING TECH  I</td>
<td>PE</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>ACCOUNTING TECH  II</td>
<td>PE</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

- 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:

<table>
<thead>
<tr>
<th>Report Effective Date</th>
<th>7/1/2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Point in Time Date</td>
<td>7/1/2010</td>
</tr>
<tr>
<td>Report Range Date</td>
<td>7/1/2010 - 7/1/2010</td>
</tr>
<tr>
<td>Department(s)</td>
<td>10</td>
</tr>
<tr>
<td>Region(s)</td>
<td>10</td>
</tr>
<tr>
<td>Division(s)</td>
<td>4</td>
</tr>
<tr>
<td>Section(s)</td>
<td>999</td>
</tr>
<tr>
<td>Position Work Type(s)</td>
<td>ALL</td>
</tr>
<tr>
<td>Job Class(es)</td>
<td>ALL</td>
</tr>
</tbody>
</table>

### 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: 1/1/2009
  - Report Point in Time Date: 1/1/2009
  - 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.

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.
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

   ![Vertical Grouped Bar Chart](image)

   • 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**

![Chart Image]

• Click Apply
• Click OK

Your report with a vertical table should look like this:

![Vertical Table Image]

• 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:

![Pie Chart Image]
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:

Save and name the report **EE Counts by Sex & Ethnicity Charts** in your 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)

![Employee Counts by Work Type Pie Chart]

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

![Employee Counts by Work Type Bar Chart]

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 101* 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:

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.

- 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:

![Navigation Map](image)

• 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

![Navigation Map](image)

• 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
  o Dates as prompts

  1. **Report Effective Date**: this is the date 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.

  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.

    o 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.

    o 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

- 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.

• 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.

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

- Save it in Class Exercises and call it Position Movement From Dates
CHAPTER 7

Report and Table Filters

- Goals and Objectives
- Report Filters
- Table Filters
- Chart Filters
- Nested Filters
- Updating Selections Box for Filters
- Effects in Document Structures and 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:

<table>
<thead>
<tr>
<th>EE ID</th>
<th>Employee Name</th>
<th>PCN</th>
<th>Job Class</th>
<th>Job Class Desc</th>
<th>Range</th>
<th>Job Class Start Date</th>
<th>Job Class End Date</th>
<th>Region</th>
<th>Div</th>
<th>Sect</th>
<th>RD Code</th>
<th>Exp</th>
</tr>
</thead>
<tbody>
<tr>
<td>102527</td>
<td>ERICKSON, LINDA A</td>
<td>027593</td>
<td>P1134</td>
<td>OFFICE ASSISTANT I</td>
<td>68</td>
<td>09/02/2009</td>
<td>03/15/2010</td>
<td>02</td>
<td>08</td>
<td>59</td>
<td>00550</td>
<td>EB</td>
</tr>
<tr>
<td>102527</td>
<td>ERICKSON, LINDA A</td>
<td>027593</td>
<td>P1134</td>
<td>OFFICE ASSISTANT I</td>
<td>68</td>
<td>03/15/2010</td>
<td>12/31/2009</td>
<td>02</td>
<td>08</td>
<td>59</td>
<td>00550</td>
<td>EB</td>
</tr>
<tr>
<td>107268</td>
<td>MIECZYNISKI, KAREN J</td>
<td>04N1060</td>
<td>P1134</td>
<td>OFFICE ASSISTANT I</td>
<td>68</td>
<td>04/05/2010</td>
<td>12/31/2009</td>
<td>30</td>
<td>05</td>
<td>02</td>
<td>04305</td>
<td>EB</td>
</tr>
<tr>
<td>120747</td>
<td>STEWART, CYNTHIA A</td>
<td>077005</td>
<td>P1134</td>
<td>OFFICE ASSISTANT I</td>
<td>68</td>
<td>10/29/2009</td>
<td>04/30/2010</td>
<td>20</td>
<td>03</td>
<td>31</td>
<td>07934</td>
<td>EB</td>
</tr>
<tr>
<td>120747</td>
<td>STEWART, CYNTHIA A</td>
<td>077005</td>
<td>P1134</td>
<td>OFFICE ASSISTANT I</td>
<td>68</td>
<td>05/01/2010</td>
<td>06/15/2010</td>
<td>20</td>
<td>03</td>
<td>31</td>
<td>07934</td>
<td>EB</td>
</tr>
<tr>
<td>137982</td>
<td>SCHELDINNAN, M</td>
<td>06N0862</td>
<td>P1134</td>
<td>OFFICE ASSISTANT I</td>
<td>68</td>
<td>07/01/2009</td>
<td>04/19/2010</td>
<td>01</td>
<td>49</td>
<td>01</td>
<td>08401</td>
<td>AW</td>
</tr>
<tr>
<td>137982</td>
<td>SCHELDINNAN, M</td>
<td>06N0862</td>
<td>P1134</td>
<td>OFFICE ASSISTANT I</td>
<td>68</td>
<td>04/20/2010</td>
<td>04/20/2010</td>
<td>01</td>
<td>49</td>
<td>01</td>
<td>08401</td>
<td>AW</td>
</tr>
<tr>
<td>142033</td>
<td>GRUBER, JAMES D</td>
<td>043004</td>
<td>P1134</td>
<td>OFFICE ASSISTANT I</td>
<td>68</td>
<td>07/01/2009</td>
<td>12/31/2009</td>
<td>01</td>
<td>05</td>
<td>09</td>
<td>04015</td>
<td>AW</td>
</tr>
<tr>
<td>153420</td>
<td>ASK, JOHANNE SANDRA</td>
<td>053011</td>
<td>P1134</td>
<td>OFFICE ASSISTANT I</td>
<td>68</td>
<td>07/01/2009</td>
<td>12/30/2009</td>
<td>01</td>
<td>03</td>
<td>01</td>
<td>05301</td>
<td>AW</td>
</tr>
<tr>
<td>153420</td>
<td>ASK, JOHANNE SANDRA</td>
<td>053011</td>
<td>P1134</td>
<td>OFFICE ASSISTANT I</td>
<td>68</td>
<td>12/31/2009</td>
<td>12/31/2009</td>
<td>01</td>
<td>03</td>
<td>01</td>
<td>05301</td>
<td>AW</td>
</tr>
<tr>
<td>158950</td>
<td>LOWN, JODY A</td>
<td>03N1060</td>
<td>P1134</td>
<td>OFFICE ASSISTANT I</td>
<td>68</td>
<td>12/03/2009</td>
<td>02/19/2010</td>
<td>40</td>
<td>55</td>
<td>52</td>
<td>034056</td>
<td>JB</td>
</tr>
<tr>
<td>182512</td>
<td>DONNELLY, BERNICE M</td>
<td>051703</td>
<td>P1134</td>
<td>OFFICE ASSISTANT I</td>
<td>68</td>
<td>07/01/2009</td>
<td>12/31/2009</td>
<td>00</td>
<td>02</td>
<td>03</td>
<td>05021</td>
<td>AW</td>
</tr>
<tr>
<td>187700</td>
<td>HAMIL, LINDA M</td>
<td>06N0910</td>
<td>P1134</td>
<td>OFFICE ASSISTANT I</td>
<td>68</td>
<td>09/17/2009</td>
<td>01/14/2010</td>
<td>02</td>
<td>04</td>
<td>11</td>
<td>05453</td>
<td>EB</td>
</tr>
<tr>
<td>190108</td>
<td>BENNETT, JANCE A</td>
<td>040083</td>
<td>P1134</td>
<td>OFFICE ASSISTANT I</td>
<td>68</td>
<td>07/10/2009</td>
<td>07/10/2009</td>
<td>01</td>
<td>05</td>
<td>06</td>
<td>04016</td>
<td>AW</td>
</tr>
</tbody>
</table>

• 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.

• 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:

<table>
<thead>
<tr>
<th>Report Effective Date</th>
<th>8/2/2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Date Range</td>
<td>7/1/2009 - 6/30/2010</td>
</tr>
<tr>
<td>Org Code(s)</td>
<td>ALL</td>
</tr>
<tr>
<td>Job Class Code(s)</td>
<td>P1134</td>
</tr>
<tr>
<td>Location Code(s)</td>
<td>ALL</td>
</tr>
<tr>
<td>Report Filtered By</td>
<td>Dept = 9:12:20</td>
</tr>
</tbody>
</table>

- 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

![Quick Filter Pop-up](image)

- 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:

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

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:

![Employee Filter Example](image)

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

![Location Chart Example](image)

• You have now completed a report with charts for the requested scenario.

• Update your Selections Box to look like this:

![Selections Box Example](image)

• Save your document again in your 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:**

---

Chapter 7
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 box. 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:

![Quick Filter Example](image)

• 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:

![Selections Box Example](image)

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
```

<table>
<thead>
<tr>
<th>EE ID</th>
<th>Employee Name</th>
<th>PCN</th>
<th>Job Class</th>
<th>Job Class Desc</th>
<th>Range</th>
<th>Job Class Start Date</th>
<th>Job Class End Date</th>
<th>Region</th>
<th>Div</th>
<th>Sect</th>
<th>RD Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>311198</td>
<td>BIRCH,MELVIN D</td>
<td>09622</td>
<td>P1134</td>
<td>OFFICE ASSISTANT I</td>
<td>08</td>
<td>07/01/2009</td>
<td>02/28/2010</td>
<td>50</td>
<td>00</td>
<td>03</td>
<td>09301</td>
</tr>
<tr>
<td>311207</td>
<td>JONES,LYNN H</td>
<td>09654</td>
<td>P1134</td>
<td>OFFICE ASSISTANT I</td>
<td>08</td>
<td>09/23/2009</td>
<td>12/31/2499</td>
<td>85</td>
<td>00</td>
<td>01</td>
<td>09500</td>
</tr>
<tr>
<td>311930</td>
<td>MCDONALD,HOPEMARIE A</td>
<td>09697</td>
<td>P1134</td>
<td>OFFICE ASSISTANT I</td>
<td>08</td>
<td>07/01/2009</td>
<td>05/15/2010</td>
<td>50</td>
<td>00</td>
<td>01</td>
<td>09500</td>
</tr>
<tr>
<td>311758</td>
<td>DELONG,BARBARA K</td>
<td>09669</td>
<td>P1134</td>
<td>OFFICE ASSISTANT I</td>
<td>08</td>
<td>06/24/2009</td>
<td>02/28/2010</td>
<td>10</td>
<td>00</td>
<td>01</td>
<td>09201</td>
</tr>
<tr>
<td>313705</td>
<td>WRIGHT,MELANIE M</td>
<td>09192</td>
<td>P1134</td>
<td>OFFICE ASSISTANT I</td>
<td>08</td>
<td>08/19/2009</td>
<td></td>
<td>15</td>
<td>02</td>
<td>01</td>
<td>09201</td>
</tr>
</tbody>
</table>

• 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 border)
- 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

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 (Ctrl + 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.
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.

![Format Cells](image)

- 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

![Alignment Tab](image)

- 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

![Format Table](image)

- 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

![Appearance Tab](image)

  • 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:

```
<table>
<thead>
<tr>
<th>Organization: 05000305 - ART STATE COUNCIL ON THE ARTS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee Name</strong></td>
</tr>
<tr>
<td>-------------------</td>
</tr>
<tr>
<td>BROWN, GINA S</td>
</tr>
<tr>
<td>FOX, CHARLOTTE A</td>
</tr>
<tr>
<td>MCNEILL, LESLIE S</td>
</tr>
<tr>
<td>NOBLE, ANDREAL</td>
</tr>
<tr>
<td>RAYL, CHRISTA A</td>
</tr>
</tbody>
</table>
```

• Spacing creates a space or gap between your columns.
  • Change the spacing to .05
  • Click Apply
• Your table should now look like:

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Class Description</th>
<th>Phone Num</th>
<th>Fax Num</th>
<th>Addr</th>
</tr>
</thead>
<tbody>
<tr>
<td>BROWN, GINA S</td>
<td>ADMIN ASST III</td>
<td>269-6500</td>
<td>259-6501</td>
<td>411 W 4RD AVE</td>
</tr>
<tr>
<td>FOX, CHARLOTTE A</td>
<td>EXEC DIR COUNCIL OF ARTS</td>
<td>269-6510</td>
<td>259-6501</td>
<td>411 W 4RD AVE</td>
</tr>
<tr>
<td>MONEILL, LESLIE S</td>
<td>FINE ARTS ADMINISTRATOR II</td>
<td>269-6510</td>
<td>259-6501</td>
<td>411 W 4RD AVE</td>
</tr>
<tr>
<td>NOBLE, ANDREA L</td>
<td>FINE ARTS ADMINISTRATOR II</td>
<td>269-6810</td>
<td>259-6801</td>
<td>411 W 4RD AVE</td>
</tr>
<tr>
<td>RAYL, CHRISTA A</td>
<td>OFFICE ASSISTANT II</td>
<td>269-6597</td>
<td>259-6601</td>
<td>411 W 4RD AVE</td>
</tr>
</tbody>
</table>

• 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:

- 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:

- 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.

  ![Format Report Window]

- 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:

![Image of Commercial Driver's License for V]

<table>
<thead>
<tr>
<th>Pos Dept Name</th>
<th>EE Name</th>
<th>PCN</th>
<th>EE ID</th>
<th>Pos Location</th>
<th>Pos Class Desc</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMMERCE</td>
<td>FORD, ROBERT JESSIE J</td>
<td>080523</td>
<td>309325</td>
<td>CAA</td>
<td>MECHANICAL TECHNICIAN</td>
</tr>
<tr>
<td>COMMERCE</td>
<td>MORIN, KEITH A</td>
<td>08X09</td>
<td>306720</td>
<td>CAA</td>
<td>KLC FACILITY MAINT SUPERVISOR</td>
</tr>
<tr>
<td>COMMERCE</td>
<td>MORTON, MICHAEL J</td>
<td>089510</td>
<td>293325</td>
<td>CAA</td>
<td>DIR HEALTH, SAFETY &amp; TRAINING</td>
</tr>
<tr>
<td>COMMERCE</td>
<td>WOOD, JASON A</td>
<td>08X015</td>
<td>307308</td>
<td>CAA</td>
<td>MAINT TECH (CORROSION CONTROL)</td>
</tr>
<tr>
<td>COMMERCE</td>
<td>ZEITNOFF, JOHN A</td>
<td>080500</td>
<td>306552</td>
<td>CAA</td>
<td>KLC FACILITY ENGINEER</td>
</tr>
<tr>
<td>EDUCATION</td>
<td>ARNOLD, JOSHUA S</td>
<td>065626</td>
<td>290358</td>
<td>ARC</td>
<td>TEACHER, MT. EDGECUMBE HS</td>
</tr>
<tr>
<td>EDUCATION</td>
<td>BLACKHORST, CARLE E</td>
<td>066034</td>
<td>308426</td>
<td>ARA</td>
<td>SOCIAL SERVICES SPECIALIST III</td>
</tr>
<tr>
<td>EDUCATION</td>
<td>BUCK, EMILY R</td>
<td>056033</td>
<td>310815</td>
<td>ARA</td>
<td>RECREATION ASSISTANT</td>
</tr>
<tr>
<td>EDUCATION</td>
<td>DAVIS, MARK J</td>
<td>056031</td>
<td>304953</td>
<td>ARC</td>
<td>MAINT GEN (F/L/J/SU)</td>
</tr>
<tr>
<td>EDUCATION</td>
<td>MUDRY, JOSEPH, JR</td>
<td>056016</td>
<td>310443</td>
<td>ARC</td>
<td>MAINT GEN (F/L/J/SU)</td>
</tr>
<tr>
<td>EDUCATION</td>
<td>STRAIN, BRETT S</td>
<td>056018</td>
<td>308737</td>
<td>ARC</td>
<td>DORMITORY ATTENDANT</td>
</tr>
<tr>
<td>LABOR</td>
<td>ATKINSON, ELDE, JULIE</td>
<td>068654</td>
<td>120545</td>
<td>DSA</td>
<td>ENVIRO SERVICES (F/L/J)</td>
</tr>
<tr>
<td>LABOR</td>
<td>BAILEY, CHRISTOPHER J</td>
<td>068550</td>
<td>300263</td>
<td>DSA</td>
<td>ENVIRO SERVICES (F/L/J)</td>
</tr>
</tbody>
</table>

10. Save in your Class Exercises folder as CDL for Vendor Formatting.
CHAPTER 9

Formulas and Variables

Goals and Objectives
Formulas
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:

![Formula Toolbar Image]

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.

![Create Variable button](image)

- Click on the Create Variable button on the toolbar.

![Create New Variable dialog](image)

- 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

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

=“Average number of employees per location is “+[Ave EE per Location]

• 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:

**Average number of employees per location is 4.8**

• 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
  
  \[
  \text{If}([\text{EE Seasonal Indicator}] = "FS", "Seasonal","")
  \]
- 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:

<table>
<thead>
<tr>
<th>Pos Dept Name</th>
<th>Seasonal Employees</th>
<th>PCN</th>
<th>Emp Name</th>
<th>EE ID</th>
<th>Pos Org Code</th>
<th>Pos Location</th>
<th>Pos Region</th>
<th>Pos Class Desc</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMMERCE</td>
<td></td>
<td>080509</td>
<td>ZBENOFF JOHN A</td>
<td>390684</td>
<td>08010591</td>
<td>CAA</td>
<td>01</td>
<td>KLC FACILITY ENGINEER</td>
</tr>
<tr>
<td>COMMERCE</td>
<td></td>
<td>080510</td>
<td>MORTON MICHAEL J</td>
<td>293525</td>
<td>08010591</td>
<td>CAA</td>
<td>01</td>
<td>DIR HEALTH SAFETY &amp; TRAINING</td>
</tr>
<tr>
<td>COMMERCE</td>
<td></td>
<td>080523</td>
<td>FORROBERTS JESSIE L</td>
<td>390265</td>
<td>08010591</td>
<td>CAA</td>
<td>01</td>
<td>MECHANICAL TECHNICIAN</td>
</tr>
<tr>
<td>COMMERCE</td>
<td></td>
<td>080533</td>
<td>MANUEL TRAVIS E</td>
<td>312389</td>
<td>08010591</td>
<td>CAA</td>
<td>01</td>
<td>MAINT TECHNICIAN - FACILITIES</td>
</tr>
<tr>
<td>COMMERCE</td>
<td></td>
<td>080009</td>
<td>MORIN KEITH A</td>
<td>395720</td>
<td>08010591</td>
<td>CAA</td>
<td>01</td>
<td>MAINTENANCE TECHNICIAN - HVAC</td>
</tr>
<tr>
<td>COMMERCE</td>
<td></td>
<td>080014</td>
<td>SCHMIDT TRAVIS A</td>
<td>397309</td>
<td>08010591</td>
<td>CAA</td>
<td>01</td>
<td>MAINT TECH (CORROSION CONTROL)</td>
</tr>
<tr>
<td>COMMERCE</td>
<td></td>
<td>080015</td>
<td>WOOD JASON A</td>
<td>397306</td>
<td>08010591</td>
<td>CAA</td>
<td>01</td>
<td>MAINT TECH (CORROSION CONTROL)</td>
</tr>
<tr>
<td>EDUCATION</td>
<td></td>
<td>056016</td>
<td>LUCRY JOSEPH JR</td>
<td>310443</td>
<td>65000602</td>
<td>ARC</td>
<td>00</td>
<td>MAINT GEN (FILJIS)</td>
</tr>
<tr>
<td>EDUCATION</td>
<td></td>
<td>056021</td>
<td>DAVID MARK J</td>
<td>394961</td>
<td>65000602</td>
<td>ARC</td>
<td>00</td>
<td>MAINT GEN (FILJIS)</td>
</tr>
<tr>
<td>EDUCATION</td>
<td></td>
<td>056026</td>
<td>ARNOLD JOSHUA S</td>
<td>390365</td>
<td>65000601</td>
<td>ARC</td>
<td>00</td>
<td>TEACHER, MT, EDGECOMBE HS</td>
</tr>
<tr>
<td>EDUCATION</td>
<td>Seasonal</td>
<td>056018</td>
<td>PERKINS SHIRLEY C</td>
<td>293757</td>
<td>65000602</td>
<td>ARC</td>
<td>00</td>
<td>DORMITORY ATTENDANT</td>
</tr>
<tr>
<td>EDUCATION</td>
<td>Seasonal</td>
<td>056033</td>
<td>BUCK EMILY R</td>
<td>310945</td>
<td>65000602</td>
<td>ARC</td>
<td>00</td>
<td>RECREATION ASSISTANT</td>
</tr>
<tr>
<td>EDUCATION</td>
<td>Seasonal</td>
<td>056034</td>
<td>BLACKHURST CARLE</td>
<td>396428</td>
<td>65000602</td>
<td>ARA</td>
<td>00</td>
<td>SOCIAL SERVICES SPECIALIST III</td>
</tr>
<tr>
<td>LABOR</td>
<td></td>
<td>056405</td>
<td>MICHAUD DANIEL P</td>
<td>216606</td>
<td>67497182</td>
<td>DSA</td>
<td>43</td>
<td>MAINT SPEC RFC (FILJU)</td>
</tr>
</tbody>
</table>

- 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 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 \[ \frac{\text{Days Vacant}}{\text{PCN Count}} \]
   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 \[ \frac{\text{Days Vacant}}{\text{PCN Count}} \] Add the words **Average Days Vacant** to the cell so the is looks like this:
   
   **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.

<table>
<thead>
<tr>
<th>Emp ID</th>
<th>Pos Work Type</th>
<th>Pos PCN (Def)</th>
<th>Pos Job Class</th>
<th>Pos Job Class Desc</th>
<th>Pos Range</th>
<th>Pos Location Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>107727</td>
<td>FACL</td>
<td>031225</td>
<td>P7109</td>
<td>VICTIM WITNESS PARALEGAL II</td>
<td>15</td>
<td>DKA</td>
</tr>
<tr>
<td>119847</td>
<td>FACL</td>
<td>030011</td>
<td>K0051</td>
<td>DIVISION OPERATIONS MANAGER</td>
<td>24</td>
<td>AYA</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Emp ID</th>
<th>Pos Work Type</th>
<th>Pos PCN (Def)</th>
<th>Pos Job Class</th>
<th>Pos Job Class Desc</th>
<th>Pos Range</th>
<th>Pos Location Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>205516</td>
<td>FACL</td>
<td>030017</td>
<td>P1134</td>
<td>ADMINISTRATIVE CLERK II</td>
<td>08</td>
<td>AYA</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Emp ID</th>
<th>Pos Work Type</th>
<th>Pos PCN (Def)</th>
<th>Pos Job Class</th>
<th>Pos Job Class Desc</th>
<th>Pos Range</th>
<th>Pos Location Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>205516</td>
<td>FACL</td>
<td>030017</td>
<td>P1134</td>
<td>ADMINISTRATIVE CLERK II</td>
<td>08</td>
<td>AYA</td>
</tr>
</tbody>
</table>
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.

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;CAACL;FAACL;HAACL;PAACL;SAACL

• **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

<table>
<thead>
<tr>
<th>Emp ID</th>
<th>Pos Work Type</th>
<th>Pos PCN (Dw)</th>
<th>Pos Job Class</th>
<th>Pos Job Class Desc</th>
<th>Pos Range</th>
<th>Pos Location Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>000120</td>
<td>FACL</td>
<td>052688</td>
<td>P3332</td>
<td>VOC REHAB ASSIST II</td>
<td>12</td>
<td>EBA</td>
</tr>
<tr>
<td>000144</td>
<td>FACL</td>
<td>212659</td>
<td>P1033</td>
<td>MICRONETWORK SPEC I</td>
<td>18</td>
<td>EBA</td>
</tr>
<tr>
<td>102559</td>
<td>FACL</td>
<td>075635</td>
<td>P1642</td>
<td>DATA PROCESSING MGR II</td>
<td>23</td>
<td>AWA</td>
</tr>
<tr>
<td>102625</td>
<td>FACL</td>
<td>052141</td>
<td>P3342</td>
<td>VOC REHAB MANAGER</td>
<td>21</td>
<td>EBA</td>
</tr>
<tr>
<td>103551</td>
<td>FACL</td>
<td>075006</td>
<td>P4633</td>
<td>SUPVR. UNEMPL INS TAX</td>
<td>23</td>
<td>AWA</td>
</tr>
<tr>
<td>103603</td>
<td>FACL</td>
<td>213108</td>
<td>P2270</td>
<td>GRANTS ADMINISTRATOR II</td>
<td>17</td>
<td>EBA</td>
</tr>
<tr>
<td>107704</td>
<td>FACL</td>
<td>213659</td>
<td>P4678</td>
<td>PROG COORDINATOR</td>
<td>20</td>
<td>EBA</td>
</tr>
<tr>
<td>109557</td>
<td>FACL</td>
<td>075855</td>
<td>P2208</td>
<td>ECONOMIST III</td>
<td>20</td>
<td>AWA</td>
</tr>
<tr>
<td>110558</td>
<td>FACL</td>
<td>075068</td>
<td>P2208</td>
<td>ECONOMIST III</td>
<td>20</td>
<td>AWA</td>
</tr>
<tr>
<td>110612</td>
<td>FACL</td>
<td>074654</td>
<td>P4661</td>
<td>EMPLOY SEC ANALYST III</td>
<td>18</td>
<td>AWA</td>
</tr>
<tr>
<td>111352</td>
<td>FACL</td>
<td>073658</td>
<td>P4694</td>
<td>WORKER COMP TECHNICIAN</td>
<td>12</td>
<td>EBA</td>
</tr>
<tr>
<td>111717</td>
<td>FACL</td>
<td>075841</td>
<td>P4651</td>
<td>EMPLOY SEC ANALYST III</td>
<td>18</td>
<td>AWA</td>
</tr>
<tr>
<td>112730</td>
<td>FACL</td>
<td>075317</td>
<td>P4612</td>
<td>UNEMPLOYMENT INS SPEC II</td>
<td>14</td>
<td>AWA</td>
</tr>
<tr>
<td>114350</td>
<td>FACL</td>
<td>071717</td>
<td>P2211</td>
<td>STATE DEMOGRAPHER</td>
<td>22</td>
<td>AWA</td>
</tr>
<tr>
<td>115707</td>
<td>FACL</td>
<td>075859</td>
<td>P4649</td>
<td>EMPLOY SEC SPEC III</td>
<td>14</td>
<td>EBA</td>
</tr>
<tr>
<td>116689</td>
<td>FACL</td>
<td>073531</td>
<td>P4678</td>
<td>ASSIST DIR EMPLOY SECURITY</td>
<td>22</td>
<td>AWA</td>
</tr>
<tr>
<td>117739</td>
<td>FACL</td>
<td>074666</td>
<td>P4661</td>
<td>EMPLOY SEC ANALYST III</td>
<td>18</td>
<td>AWA</td>
</tr>
<tr>
<td>117802</td>
<td>FACL</td>
<td>052109</td>
<td>P4678</td>
<td>PROG COORDINATOR</td>
<td>20</td>
<td>EBA</td>
</tr>
<tr>
<td>119884</td>
<td>FACL</td>
<td>074689</td>
<td>P1790</td>
<td>RESEARCH ANALYST II</td>
<td>16</td>
<td>AWA</td>
</tr>
</tbody>
</table>

• 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.

<table>
<thead>
<tr>
<th>Emp ID</th>
<th>Pos Work Type</th>
<th>Pos PCN (Did)</th>
<th>Pos Job Class</th>
<th>Pos Job Class Desc</th>
<th>Pos Range</th>
<th>Pos Location Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>123262</td>
<td>SA SL</td>
<td>075007</td>
<td>P4649</td>
<td>EMPLOY SEC SPEC IB</td>
<td>14</td>
<td>AWA</td>
</tr>
<tr>
<td>163423</td>
<td>SA SL</td>
<td>075933</td>
<td>P4649</td>
<td>EMPLOY SEC SPEC IB</td>
<td>14</td>
<td>AWA</td>
</tr>
<tr>
<td>225988</td>
<td>SA SL</td>
<td>075275</td>
<td>P4655</td>
<td>EMPLYMNT SERVICE MGR</td>
<td>16</td>
<td>HCE</td>
</tr>
<tr>
<td>227442</td>
<td>SA SL</td>
<td>058689</td>
<td>P3150</td>
<td>EDUCATION PROG ASSISTANT</td>
<td>12</td>
<td>DSA</td>
</tr>
<tr>
<td>228621</td>
<td>SA SL</td>
<td>050000</td>
<td>P0101</td>
<td>FOOD SERVICE (FLU/SU)</td>
<td>57</td>
<td>DSA</td>
</tr>
<tr>
<td>254336</td>
<td>SA SL</td>
<td>050800</td>
<td>P7805</td>
<td>DORMITORY ATTENDANT</td>
<td>11</td>
<td>DSA</td>
</tr>
<tr>
<td>267233</td>
<td>SA SL</td>
<td>058608</td>
<td>P9101</td>
<td>FOOD SERVICE (FLU/SU)</td>
<td>57</td>
<td>DSA</td>
</tr>
<tr>
<td>268580</td>
<td>SA SL</td>
<td>058670</td>
<td>P9171</td>
<td>ENVIR0 SERVICES (FLU)</td>
<td>60</td>
<td>DSA</td>
</tr>
<tr>
<td>270593</td>
<td>SA SL</td>
<td>075776</td>
<td>P4649</td>
<td>EMPLOY SEC SPEC IB</td>
<td>14</td>
<td>EBA</td>
</tr>
<tr>
<td>271918</td>
<td>SA SL</td>
<td>075720</td>
<td>P4649</td>
<td>EMPLOY SEC SPEC IB</td>
<td>14</td>
<td>AWA</td>
</tr>
<tr>
<td>272740</td>
<td>SA SL</td>
<td>058438</td>
<td>P3220</td>
<td>RECREATION ASSISTANT</td>
<td>11</td>
<td>DSA</td>
</tr>
<tr>
<td>276676</td>
<td>SA SL</td>
<td>058632</td>
<td>P4649</td>
<td>EMPLOY SEC SPEC IB</td>
<td>14</td>
<td>EBA</td>
</tr>
<tr>
<td>277262</td>
<td>SA SL</td>
<td>075838</td>
<td>P4649</td>
<td>EMPLOY SEC SPEC IB</td>
<td>14</td>
<td>AWA</td>
</tr>
</tbody>
</table>

• 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.

<table>
<thead>
<tr>
<th>Emp ID</th>
<th>Pos Work Type</th>
<th>Pos PCN</th>
<th>Pos Job Class</th>
<th>Pos Job Class Desc</th>
<th>Pos Range</th>
<th>Pos Location Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>270593</td>
<td>SAACL</td>
<td>075776</td>
<td>P4649</td>
<td>EMPLOY SEC SPEC IB</td>
<td>14</td>
<td>EBA</td>
</tr>
<tr>
<td>276676</td>
<td>SAACL</td>
<td>075632</td>
<td>P4649</td>
<td>EMPLOY SEC SPEC IB</td>
<td>14</td>
<td>EBA</td>
</tr>
<tr>
<td>279796</td>
<td>SAACL</td>
<td>075589</td>
<td>P4649</td>
<td>EMPLOY SEC SPEC IB</td>
<td>14</td>
<td>EBA</td>
</tr>
<tr>
<td>279995</td>
<td>SAACL</td>
<td>075683</td>
<td>P4649</td>
<td>EMPLOY SEC SPEC IB</td>
<td>14</td>
<td>EBA</td>
</tr>
<tr>
<td>285939</td>
<td>SAACL</td>
<td>075466</td>
<td>P4649</td>
<td>EMPLOY SEC SPEC IB</td>
<td>14</td>
<td>EBA</td>
</tr>
<tr>
<td>300349</td>
<td>SAACL</td>
<td>075557</td>
<td>P4649</td>
<td>EMPLOY SEC SPEC IB</td>
<td>14</td>
<td>EBA</td>
</tr>
<tr>
<td>307474</td>
<td>SAACL</td>
<td>072078</td>
<td>P7767</td>
<td>INVESTIGATOR II</td>
<td>15</td>
<td>EBA</td>
</tr>
<tr>
<td>308619</td>
<td>SAACL</td>
<td>075868</td>
<td>P4649</td>
<td>EMPLOY SEC SPEC IB</td>
<td>14</td>
<td>EBA</td>
</tr>
<tr>
<td>309845</td>
<td>SAACL</td>
<td>075716</td>
<td>P4649</td>
<td>EMPLOY SEC SPEC IB</td>
<td>14</td>
<td>EBA</td>
</tr>
<tr>
<td>309846</td>
<td>SAACL</td>
<td>075725</td>
<td>P4649</td>
<td>EMPLOY SEC SPEC IB</td>
<td>14</td>
<td>EBA</td>
</tr>
<tr>
<td>310773</td>
<td>SAACL</td>
<td>075665</td>
<td>P4649</td>
<td>EMPLOY SEC SPEC IB</td>
<td>14</td>
<td>EBA</td>
</tr>
<tr>
<td>310775</td>
<td>SAACL</td>
<td>075051</td>
<td>P4649</td>
<td>EMPLOY SEC SPEC IB</td>
<td>14</td>
<td>EBA</td>
</tr>
<tr>
<td>310776</td>
<td>SAACL</td>
<td>075124</td>
<td>P4649</td>
<td>EMPLOY SEC SPEC IB</td>
<td>14</td>
<td>EBA</td>
</tr>
<tr>
<td>310781</td>
<td>SAACL</td>
<td>075076</td>
<td>P4649</td>
<td>EMPLOY SEC SPEC IB</td>
<td>14</td>
<td>EBA</td>
</tr>
<tr>
<td>310782</td>
<td>SAACL</td>
<td>075187</td>
<td>P4649</td>
<td>EMPLOY SEC SPEC IB</td>
<td>14</td>
<td>EBA</td>
</tr>
<tr>
<td>310783</td>
<td>SAACL</td>
<td>075824</td>
<td>P4649</td>
<td>EMPLOY SEC SPEC IB</td>
<td>14</td>
<td>EBA</td>
</tr>
</tbody>
</table>

• 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:

- 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:

![Sort Properties Window]

- 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

   ![Menu button image](image)

2. Report Toolbar Button

   ![Report Toolbar Button image](image)

3. Right Click on the column

   ![Right Click image](image)

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:

<table>
<thead>
<tr>
<th>Emp ID</th>
<th>Pos Work Type</th>
<th>Pos PCN (Def)</th>
<th>Pos Job Class</th>
<th>Pos Job Class Desc</th>
<th>Pos Range</th>
<th>Pos Location Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>189137</td>
<td>FACL</td>
<td>075821</td>
<td>K0017</td>
<td>ADMINISTRATIVE ASSISTANT I</td>
<td>12</td>
<td>AWA</td>
</tr>
<tr>
<td>230732</td>
<td>FACL</td>
<td>071222</td>
<td>K0017</td>
<td>ADMINISTRATIVE ASSISTANT I</td>
<td>12</td>
<td>AWA</td>
</tr>
<tr>
<td>276671</td>
<td>FACL</td>
<td>213115</td>
<td>K0017</td>
<td>ADMINISTRATIVE ASSISTANT I</td>
<td>12</td>
<td>JBA</td>
</tr>
<tr>
<td></td>
<td>FACL</td>
<td>075040</td>
<td></td>
<td>ADMINISTRATIVE ASSISTANT I</td>
<td>12</td>
<td>DGA</td>
</tr>
</tbody>
</table>

| Count |               | K0017         |

- 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:

<table>
<thead>
<tr>
<th>Emp ID</th>
<th>Pos Work Type</th>
<th>Pos PCN (Def)</th>
<th>Pos Job Class</th>
<th>Pos Job Class Desc</th>
<th>Pos Range</th>
<th>Pos Location Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>220711</td>
<td>FACL</td>
<td>052205</td>
<td>K0018</td>
<td>ADMINISTRATIVE ASSISTANT II</td>
<td>14</td>
<td>EBA</td>
</tr>
<tr>
<td>230816</td>
<td>FACL</td>
<td>075128</td>
<td>K0018</td>
<td>ADMINISTRATIVE ASSISTANT II</td>
<td>14</td>
<td>EBA</td>
</tr>
<tr>
<td>260858</td>
<td>FACL</td>
<td>075044</td>
<td>K0018</td>
<td>ADMINISTRATIVE ASSISTANT II</td>
<td>14</td>
<td>AWA</td>
</tr>
<tr>
<td>270023</td>
<td>FACL</td>
<td>071703</td>
<td>K0018</td>
<td>ADMINISTRATIVE ASSISTANT II</td>
<td>14</td>
<td>AWA</td>
</tr>
<tr>
<td>279635</td>
<td>FACL</td>
<td>075327</td>
<td>K0018</td>
<td>ADMINISTRATIVE ASSISTANT II</td>
<td>14</td>
<td>AWA</td>
</tr>
<tr>
<td>290968</td>
<td>FACL</td>
<td>213121</td>
<td>K0018</td>
<td>ADMINISTRATIVE ASSISTANT II</td>
<td>14</td>
<td>EBA</td>
</tr>
<tr>
<td>281521</td>
<td>FACL</td>
<td>058395</td>
<td>K0018</td>
<td>ADMINISTRATIVE ASSISTANT II</td>
<td>14</td>
<td>DGA</td>
</tr>
<tr>
<td>292925</td>
<td>FACL</td>
<td>052004</td>
<td>K0018</td>
<td>ADMINISTRATIVE ASSISTANT II</td>
<td>14</td>
<td>AWA</td>
</tr>
<tr>
<td>294252</td>
<td>FACL</td>
<td>075624</td>
<td>K0018</td>
<td>ADMINISTRATIVE ASSISTANT II</td>
<td>14</td>
<td>AWA</td>
</tr>
</tbody>
</table>

- 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 not 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.

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:

<table>
<thead>
<tr>
<th>Department:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emp ID</td>
</tr>
<tr>
<td>Pos Work Type</td>
</tr>
<tr>
<td>Pos PB1 (Left)</td>
</tr>
<tr>
<td>Pos Job Class</td>
</tr>
<tr>
<td>Pos Job Class Desc</td>
</tr>
<tr>
<td>Pos Range</td>
</tr>
<tr>
<td>Pos Location Code</td>
</tr>
<tr>
<td>Pos Barg Unit</td>
</tr>
</tbody>
</table>

• 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.

• 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 Dep 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**

<table>
<thead>
<tr>
<th>Position Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>902</td>
</tr>
</tbody>
</table>

  **Position Work Type: FACL**

<table>
<thead>
<tr>
<th>Emp ID</th>
<th>Pos PCN (Def)</th>
<th>Pos Job Class</th>
<th>Pos Job Class Desc</th>
<th>Pos Range</th>
<th>Pos Location Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>189137</td>
<td>075821</td>
<td>K0017</td>
<td>ADMINISTRATIVE ASSISTANT I</td>
<td>12</td>
<td>AWA</td>
</tr>
<tr>
<td>230732</td>
<td>071222</td>
<td>K0017</td>
<td>ADMINISTRATIVE ASSISTANT I</td>
<td>12</td>
<td>AWA</td>
</tr>
<tr>
<td>276871</td>
<td>213115</td>
<td>K0017</td>
<td>ADMINISTRATIVE ASSISTANT I</td>
<td>12</td>
<td>DQA</td>
</tr>
<tr>
<td>189137</td>
<td>075040</td>
<td>K0017</td>
<td>ADMINISTRATIVE ASSISTANT I</td>
<td>12</td>
<td></td>
</tr>
</tbody>
</table>

• 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:

• 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

![Image of General tab](image)

- 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:

![Diagram of Report Panel](image)

**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:

![Image of CDL for Vendor Revised]

18. Verify that the report begins like:

<table>
<thead>
<tr>
<th>Report Effective Date</th>
<th>12/24/2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Point in Time Date</td>
<td>12/24/2008</td>
</tr>
<tr>
<td>Service Center(s)</td>
<td>PUBLIC PROTECTION</td>
</tr>
<tr>
<td>Section Filtered by</td>
<td>Dept = Mil Vet Aff</td>
</tr>
</tbody>
</table>

### MIL VET AFF

<table>
<thead>
<tr>
<th>Pos Org Code</th>
<th>PCN</th>
<th>Emp Name</th>
<th>EE ID</th>
<th>Pos Location</th>
<th>Pos Region</th>
<th>Pos Class Desc</th>
<th>Emp Season Ind</th>
</tr>
</thead>
<tbody>
<tr>
<td>09500002</td>
<td>090015</td>
<td>STASER GREGORY J</td>
<td>256072</td>
<td>EBG</td>
<td>50</td>
<td>MAINT GEN (FLJUSJ)</td>
<td>FR</td>
</tr>
<tr>
<td>090019</td>
<td>FERGUSON DAVID B</td>
<td>292408</td>
<td>EBG</td>
<td>50</td>
<td>MAINT GEN (FLJUSJ)</td>
<td>FR</td>
<td></td>
</tr>
<tr>
<td>090620</td>
<td>PEPLOW TODD A</td>
<td>273958</td>
<td>EBG</td>
<td>50</td>
<td>MAINT SPEC ETRIAN</td>
<td>FR</td>
<td></td>
</tr>
<tr>
<td>090020</td>
<td>MILLER CHARLES R JR</td>
<td>299388</td>
<td>EBG</td>
<td>50</td>
<td>MAINT SPEC BFC (FLJU)</td>
<td>FR</td>
<td></td>
</tr>
<tr>
<td>090099</td>
<td>MCCULLON PATRICK L</td>
<td>268265</td>
<td>EBG</td>
<td>50</td>
<td>EQUIP OPERATOR (FLJUSJ)</td>
<td>FR</td>
<td></td>
</tr>
<tr>
<td>090119</td>
<td>HARRELL TRAVIS</td>
<td>294904</td>
<td>EBG</td>
<td>50</td>
<td>MAINT GEN (FLJUSJ)</td>
<td>FR</td>
<td></td>
</tr>
<tr>
<td>090191</td>
<td>BURR JOHN E</td>
<td>238010</td>
<td>EBG</td>
<td>50</td>
<td>STOCK &amp; PARTS SVCS (FLJUSJ)</td>
<td>FR</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Pos Org Code</th>
<th>PCN</th>
<th>Emp Name</th>
<th>EE ID</th>
<th>Pos Location</th>
<th>Pos Region</th>
<th>Pos Class Desc</th>
<th>Emp Season Ind</th>
</tr>
</thead>
<tbody>
<tr>
<td>09500003</td>
<td>090364</td>
<td>DUVAY ABERYAN B</td>
<td>100262</td>
<td>JBY</td>
<td>50</td>
<td>EQUIP OPERATOR (FLJUSJ)</td>
<td>FR</td>
</tr>
<tr>
<td>090385</td>
<td>LEFFINGWELL BRIAN J</td>
<td>265435</td>
<td>JBY</td>
<td>50</td>
<td>EQUIP OPERATOR (FLJUSJ)</td>
<td>FR</td>
<td></td>
</tr>
<tr>
<td>09500003</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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:
   - Right-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

![Format Section dialog box]

- 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:

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

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.

![Adobe Preferences](image)

**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:

<table>
<thead>
<tr>
<th>To obtain data...</th>
<th>For example...</th>
<th>Select...</th>
<th>To create the filter...</th>
</tr>
</thead>
</table>

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

**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 too far, formatting becomes very difficult!!! (you may spill the section onto the second page of the report)

- 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”.

- 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”.

1. Locate the table in your report.
2. Hover over the table until it is outlined.
3. Click and hold on the cross box in the upper left-hand corner of the table.
4. Drag the table down to the bottom gray area.
5. 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:
<table>
<thead>
<tr>
<th>Calculation Type</th>
<th>Icon</th>
<th>Use to…</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sum</td>
<td>Σ</td>
<td>Calculate the sum of the selected data.</td>
</tr>
<tr>
<td>Count</td>
<td>n</td>
<td>Count all rows for a measure object or count distinct rows for a dimension or detail object.</td>
</tr>
<tr>
<td>Average</td>
<td>̅x̅</td>
<td>Calculate the average of the selected data.</td>
</tr>
<tr>
<td>Minimum</td>
<td>∞</td>
<td>Display the minimum value of the selected data.</td>
</tr>
<tr>
<td>Maximum</td>
<td>∞</td>
<td>Display the maximum value of the selected data.</td>
</tr>
<tr>
<td>Percentage</td>
<td>Σ</td>
<td>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.</td>
</tr>
</tbody>
</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...
Web Intelligence

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

### Definitions of User Roles and Capabilities

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