

Monarch Advanced Course Curriculum

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Length:

2 days, 14 total classroom hours – live instructor based.

14 CPE credits.

Prerequisites:

Successful completion of MrMonarch's Intermediate Course, or software mastery beyond fundamentals for model building, data manipulation through both the table and summary windows and generating useful reports. If you have not attended any classes, speak with an instructor prior to registration.

Goals:

Take your skill set to the next level by learning new tools, discovering new uses for old tools, finding data trends, performing exception reporting. This course challenges your current skills and assumptions to release your inner master craftsman. Learn through hands-on exercises, instructor lead discussions and resolving your own real-world challenges.

MrMonarch Advantage:

We can use your data to form part of (or all of) the curriculum – send file(s) in advance or provide them at training time. Constructing your current business models in class creates a real-time work-while-learn environment. This not only jump-starts your ROI, it enables you to take solutions back to the office that you built and understand fully. Combining your data with our proven training techniques and lively, approachable, egos-at-the-door classroom environment simply means that you learn more material and software functionality.

Topics:

- Master data Imports and Exports (including the OpenXML spreadsheets)
- Master maximizing export software Interpretation (i.e. Excel AutoFilter/Formulas, Tree View/Bookmarks)
- Master multiple source Data Joining and Multiple Field Linking
- Master Project Export features like exporting several views in the same file
- Master Adding and Replacing Data in files and tables
- Master Linking between models, templates, calculated fields, filters
- Master the new enhanced Database Filter features for Imports and External Lookups

Report Window

- Master the toughest Report Inconsistencies
- Master processing Multiple Detail Levels for a single report
- Master Multi-Column Regions
- Master all Traps: wild, literal, floating, postal, not, numeric or
- Master Date recognition, multiple formats and interpretation
- Master extraneous Data Collection like double counting total lines
- Master Advanced Field Options (i.e., preceding string, last defined field)
- Master Templates (detail, append, header or footer)
- Master alternative Trapping to avoid gathering disparate data
- Master using various File Types (prn/txt, pdf, html)
- Master Multi-Pass to join information from several reports and locations

Table Window

- Master Calculated Fields (20+ New functions), Lookups, Multiple Runtime Parameters and Operators
- Master buffering and leading zeros
- Master the art of creatively Applying old functions New Responsibilities (i.e., Instr)
- Master adjusting for non-standard fiscal quarters using Qtr
- Master Filters for techniques like Duplicate Handling Options
- Master User-Defined Functions for custom resolutions to the current model and other models

Master Expressions by unleashing their power to work for you (including the new Test feature)

Summary Window

Master merging current Filters with Summary data for targeted results
Master Specified Values (ad hoc Filtering)
Master Upper Limit Values for aging reports
Master Multiple Report record comparison using Count for focus and Filtering
Master Wild Cards to tame Summaries, Filters and Calculated Fields
Master Chart and Color Selection to create graphical stories
Master Exception highlighting
Master new Hiding features for Keys, Measure and Items (hide for exports too)

Class Exercises:

Frequent exercises engage you in challenging missions that solidify learning in an open, easy and fun environment. We include more file types so our students understand the big picture, gain valuable experience, identify alternative resolutions and can then apply their knowledge to any situation, like: sales history, general ledger, vendors/terms of sale, fees billed/paid, properties, sales and profit, database, error logs.

Lab Session:

The class ends with a lab session during which we resolve your current challenges, play out potential scenarios and answer general questions. We encourage you to bring your data and/or a scenario or three. Then, with the support of an expert craftsman at your fingertips, you apply your new knowledge and walk away empowered with answers.

To Register for a class:

Either:

1. Call David M. Gross, 440.646.0332 to schedule a class.
2. Email david.gross@MrMonarch.com to set up a class date.

CPE Credits:

Software Conquest Inc, (dba MrMonarch) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417. Web site: www.nasba.org.

Refund and Complaint Policy:

For questions about refunds, cancellations, or complaints, please contact David M. Gross at 440.646.0332 or david.gross@MrMonarch.com. _