Monarch Intermediate Course Curriculum
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Length: 2 days, 14 total classroom hours

Prerequisites: Successful completion of Mr. Monarch's Basic Course, or mastery of software fundamentals, like: model building, data trapping, data extraction and generating useful reports.

Goals: Expand your basic skill set to see multiple resolution possibilities then apply the most efficient solution the first time. Learn through hands-on exercises, instructor lead discussions and resolving your own real-world challenges.

MrMonarch Advantage:
I 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 my proven training techniques and lively, approachable, egos-at-the-door classroom environment simply means that you learn more material and software functionality.

Topics:
    Basic skills course tools and terms overview
    Learn the purpose and use of Project Files and Portable Reports; when and how they work for you
    Link Objects between models like: templates, fields, filters, calculated fields

Report Window
    Use Address Blocks and Postal Traps to extract different address types within the same report
    Skillfully maneuver report inconsistencies: Multiple Lines, Data and Field Irregularities
    Discover your Report Reading Zen for recognizing hidden report structures
    Adjust Date Ranges with data extraction
    Avoid double counting the total and subtotal lines
    Apply Advanced Field Options like specifying field extraction start and end points; intermittent data
    Know which Template to use: Detail, Append, Page Header and Footer Templates
    Extract non-standard report data by defining a Multi-Column Region
    Exploit Trapping to its fullest potential: Wild, Literal, Floating, Postal, Not, Numeric Or
    Grab data to immediately Export as a Bookmarked PDF
    Find out how Auto-Define Fields can work harder
    View Problematic Reports from different perspectives to capture only select data

Table Window
    Utilize Operators and Expressions to their fullest potential (learn 20+ Calculated Fields and Nesting)
    Simplify complicated data strings by separating or joining with Nested Expressions
    Set up Runtime Parameters to input variable data when opening a model (i.e. exchange rate)
    Explore Sorting, Hiding and Autosizing Column Widths
    Create Filters and apply Duplicate Handling options
    Understand and apply Filters and Compound Filters to: analyze top x data or remove data
    Utilize Multiple Lookup Fields as a simple way to reference and sort a list of pre-existing values
    Generate User-Defined Functions for custom resolutions to the current model and other models
    Unleash User-editable Fields for unexpected results
    Expand your current understanding of Address Blocks, Dates, Test Tab, Comments
    Make use of an unused blank are within a sample to extract a preceding string.

Summary Window
Harness Wild Cards to tame Summaries, Filters and Calculated Fields
Make Summaries do the work, like calculating subtotals/totals, averages and percentages
Change data display/perspective with the Across Key or CrossTab and Drilling Up/Down
Replicate your corporate image with Design Preferences
Learn Value Matching (Summary to Report) to efficiently narrow topics (like a Filter in a Summary)
Produce expressive, colorful and informative Charts (Area, Bar, Line, Pie, Point) for the greatest ROI
Employ Measure Expressions to perform calculations

Importing and External Lookups
Import Data from various sources
Import or Join Data that appends tables and/or generates new data columns
Formulate External Lookups to incorporate one ore more data sources
Export Data to other applications like MS Excel with multiple worksheets appended to one file
Link Multiple Fields

Project Files
Export Project Files in just a couple mouse clicks
Jumpstart new projects using Exports
Combine Table and Summary Data into one exported Excel file
Manage Project files that contain exports and imports, Lookups and User-editable Fields

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: customer history, general ledger, fees billed/paid, properties, family tree, database, logs, inventory, patient records.

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.