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Monarch Professional Version 11.x Self-Paced Course Curriculum.

When logged into the Course (via Digital Chalk) the tech support line is 877.321.2451 Option 2, 8:30-5:30 EST M-F.

Course Technical Specifications:

1. Course total time 140 minutes:
   a. Three minute Intro
   b. Eleven Modules, average length 13 minutes.
   c. Short Quiz after each Module.
   d. Short Survey at end of course.
   e. Certificate supplied upon course completion.
2. You have 48 hours to complete the course or go through it twice, whichever occurs first.
3. You have the ability to pause or stop the course and come back later as well as replay segments.
4. The course speed is moderate, slow enough for you to write notes and at a pace to keep your attention. You can also pause and rewind.
5. To take the course:
   a. Set up an account with the Learning System.
   b. Select your course.
   c. Pay for the course.
   d. Take the course!

Module Contents (detail of each Module follows):

1. Intro. (3 minutes)
2. Data Extraction Steps.
3. More Data Extraction Steps.
4. Creating Filters.
5. Creating Calculated Fields
6. Exporting Data.
7. Creating Summaries Basic.
8. Creating Summaries Advanced Techniques.

9. Opening Database files.
10. Using Floating Traps.
11. Opening PDF Files.
12. Options, Filters, Autotraps.

Module Descriptions:

1. Module One – Steps for Data Extraction:
   - Extracting data from a Classical Music Distributor Shipping Report
   - Opening a Report
   - What is a Detail Template
   - Shortcut #1, selecting a Sample Line
   - Selecting a Template Role
   - How to build a Numeric Trap
   - How to Select and name fields of the Table
   - How to Verify the width of your field selections
   - Viewing a Table
   - How to Save a Model File
   - How to Open a Report and apply the Model File
   - How to build a Literal Trap
   - How to use Auto Define as opposed to selecting fields individually
   - How to delete a selection in the Sample Line
   - Why to define a Numeric field as a Character

2. Module Two – More Data Extraction
   - How to pull up recently used Reports or Models.
   - How to fill in data that should be repeating in a table from the Field Properties Window
   - How to create an Append Template
   - How and why to define a Multi-Line Trap
   - How to change Template colors
   - When to click on the Template button and not the down arrow
   - How to select a line when using a Multi-Line trap.

3. Module Three – Creating and Using Filters
   - How to build a Formula Based Filter
   - How to use a shortcut to build a single criteria Formula Based Filter
   - How to test a Filter
   - When to use the Filter button

- How to build a two criteria Filter
- When to use quotes in a Filter
- How to use an .And. clause in a Filter
- When you need brackets around a field name
- How to know if a Filter is turned on
- How to use the Instr() function in a Filter
- How to know you supplied all arguments for a Function
- How and why to build a Compound Filter

4. Module Four – Creating and Using Calculated Fields
- What is a Calculated Field
- How to use an If() statement in a Calculated Field
- How to verify numbers are truly numbers
- How to strip off characters from a Field (the Right() Function)
- How to embed a Function within a Function and the order in which they are evaluated
- How to display the English name (month) of a date field

6. Module Five – Creating Basic Summaries
- What is a Summary
- How to use a Filter within a Summary only
- How to specify No Filter for a Summary
- How to change the Title Row style
- How to generate a Grand Total Row for a set of data.
- What are the parts of a Summary
- How to change the style of a Grand Total Row
- How to use and create the same Measure field but with different aggregate functions
- How to edit the formula of a Measure field
- How to create a Subtotal row within a Summary
- How to change the color of the Subtotal row
- How to choose a Summary to edit

7. Module Six – Creating Advanced Summaries
- How to use color limits in a Summary based upon Upper and Lower limits for numeric data
- How to create a consistent Header and Footer for all Summaries
- How to build a Quick Summary
- How to set Layout and preferences in a Summary that are applied to all new Summaries

- How to create a Crosstab Summary
- How to delete or modify "null" label for null fields
- How to drill up and drill down Summary data
- How to set a Filter within a Summary, not your standard Filter type.

8. Module Seven – How to Open a Database File
   - How to open a local database (Access) file type
   - How to view both Queries and Tables of an Access file
   - How to filter on the database side (Source filtering)
   - How to choose fields from the database you want to include
   - How and why to save it all as a Project
   - How to pull in an updated/refreshed database
   - How to link (join) a table to a database (External Lookup)

9. Module Eight – How to Create a Floating Trap for Trapping Inconsistent Data
   - How to turn on Floating Trap
   - When and how to use a Floating Trap
   - How to capture data that changes width
   - The shortcut to get to edit mode of a Template
   - How and why you define the start and end of fields in the trap line when you use a Floating Trap
   - How to use Count in a Summary to tabulate occurrences of a value
   - How to change the sort of a Summary to be based upon a Measure
   - How to see the Top X value of a Summary

10. Module Nine – How to Open a PDF File
    - What is "Dave's Trick" to opening a PDF file?
    - Why to open a Model File first.
    - How to save the Scaling
    - Why you save your data as a Project
    - How to use Autotrap.
    - How to tweak Autotrap if the first pass does not work entirely

11. Module Ten – Options, Value Based Filters, Summary Tips
    - How to set File Locations (Options)
    - How to change the input date format (Options)
    - How to clean up text and memo inputs (Options)
    - Where to note if traps are to be case sensitive
    - How to suppress Null values

- How to Export field names with data
- How to apply Excel options for data export
- How to modify clipboard options
- How to build a Value Based Filter (multiple .OR. conditions)
- How to duplicate a Filter, Calculated Field or Summary
- How to build a filter via Matching tab in a Summary Key field
- How to build a filter via the Matching tab based upon a Measure field.

You're Done!! Congratulations.