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## **IDEA Training Course Curriculum**

**Length:** 3 days, 21 total classroom hours

Each course can be taken separately

**Prerequisites:** none

### **Overall Goals:**

Gain experience and skills with both hands-on exercises and instructor lead discussions. Learn and practice key data elements such as, importing, reconciling, sampling, indexing/sorting, extracting, stratifying, summarizing, aging, gap detecting, relating databases, analyzing and scripting. Master key software features such as, Report Reader, Equation Editor, @functions, and analysis/reporting tools. By the end of this course, the novice user will return to the office and hit the ground running; the seasoned user will gain a deeper understanding of core competencies and maximize their daily performance.

### **MrIdea 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.

### **Day One: Mine Data using the Import Assistant and Report Reader**

Explore Working Folder benefits

Conquer Data Imports: Excel, Access, ASCII Delimited/Fixed, EBCDIC, dBase, Quickbooks, AS400

Learn time-saving Record Definition techniques

Demystify Report Reader

Apply and understand both simple and complex trapping: alpha, numeric, space, non-blank, floating

Unpeel layers: basic, append, floating and their components (anchor line, field editor, field anchor)

Tackle tricky data samples: wrapped text, multiple line, columns, headers, suppressed text, filters

Discover the importance of Field Order

Find out when to exclude lines, apply a filter and the purpose of using the previous value

### **Day Two: Import, Manipulate and Present Data**

#### **Prerequisite (knowledge of Day One material)**

Verify data integrity using Control Totals, Field Statistics, Summarizations and Sampling

Understand the Indexing and Sorting differences

Maneuver through data quickly with record grouping, go to, find, filtering, extracting, filtering

Merge disparate databases correctly choosing join, append or compare

Export data, reports and results

Utilize powerful and time-saving @ functions with Equation Editor

Assess data with summarizing, aging, detecting gaps/duplicates, stratifying, extracting and filtering

Change data types, appearances, orders, field manipulation including adding columns

Display results graphically: tables, charts, graphs

## **Day Three: Complex Project Skills and Equations**

### **Prerequisite (knowledge of Day One and Day Two material)**

- Construct editable fields
- Correct errors or test theories using re-run tasks
- Extract data with key values, indexed, direct and top records
- Explore summarizations and pivot tables
- Relate databases using multiple relationships, visual connectors, joins, cross-linking
- Use key values to create a secondary database series
- Unleash even more powerful and time-saving @ functions
- Analyze data using Benford's Law, Action Fields
- Record, run, define scripts/macros; add them to menus and toolbars
- Save time and processing power by utilizing process stacker
- Simplify and speed data location using search

### **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, such as: sales history, general ledger, aging, 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 you need resolved. Then, with the support of an expert craftsman at your fingertips, you apply your new knowledge and walk away empowered with answers.

## **Day 4: IDEAScript Level I**

### **Prerequisite (completion of Import, Manipulate and Present Data class (Day 2))**

IDEAScript is a VBA (Visual Basic for Applications) type language that is embedded with IDEA Version Seven. With this language you can write scripts to automate repetitive tasks and run other OLE enabled software and perform particular functions per your requirements. For this class you will learn:

- How to write, record, edit and run (playback) your own subroutines
- Create both message and input boxes asking the user for specific information that will be used in later stated functions.

## **Day 5: IDEAScript Level II**

### **Prerequisite (completion of IDEAScript Level I (Day 4))**

IDEAScript is a VBA (Visual Basic for Applications) type language that is embedded with IDEA Version Seven. With this language you can write scripts to automate repetitive tasks and run other OLE enabled software and perform particular functions per your requirements. For this class you will expand upon what you learned in IDEAScript Level 1 and learn:

- How to set up and use arrays
- Establishing control structures
- Create sub-routines and functions
- Create custom dialog boxes specifying user input and parameters