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Caseware IDEA Version 10.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.

Version 10.x Self-Paced Course Curriculum (live link to pdf)

Course Deliverables: (Main Topics)

- How to Import an Ascii file, both delimited and fixed length and create an IDEA database.
- How to Import an Excel file and create an IDEA database.
- How to Import an Access file and create an IDEA database.
- How to use Report Reader for Report Files and PDF files from simple to complex reports to extract data and create IDEA databases.
- How to build Standard Layer and Floating Layer and Append Layers for text based and PDF file reports for the creation of IDEA databases.
- What Field Statistics can tell you along with Control Totals.

Course Technical Specifications:

1. Course total time 80 minutes – IDEA Basics of Data Import and Report Reader:
   a. Four Modules, average length 20 minutes.
   b. Short Quiz after each Module.
   c. Short Survey at end of course.
   d. Certificate supplied upon course completion.
2. You have 96 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!

OPTION OF INDIVIDUAL MODULES:

1. You now have the option of taking this course one Module at a time. However, if you take the entire course there is cost savings. The entire course is IDEA Basics of Data Import and Report Reader, which contains all four modules. Otherwise you can take one Module at a time, titled below. They will be listed in the Course Catalog once you register.

Module Contents (detail of each Module follows):

1. Import different file types, including Excel, Access and Ascii.
2. Import/Acquire data via the Report Reader for PDF/Report Files.
3. Import/Acquire data via the Report Reader for PDF/Report Files with more than one layer.
4. Import/Acquire data via the Report Reader for PDF/Report files using the Floating Layer for non-consistent report layouts.

Module Descriptions:

1. Module One – Steps for Importing Excel, Access and Ascii file types.

- Learn the rules for how an Excel files has to be set up prior to Import.
- Accessing the Import Assistant and selecting the file to import.
- Choosing Fields Names or not.
- Importing an Excel File with multiple worksheets.
- When to use Value to Zero feature and its benefits for Excel Files.
- Key Option for importing an Access file for field size.
- What Field Stats for Dates means.
- How to Index a database and then revert back to its original order.
- For Ascii files, how to import a tab delimited files and create field names and field types.
- How to Import a fixed length Ascii file.
- When and how to use Control Totals.
- Cleaning up a database window of extraneous files.

2. Module Two – Using the Report Reader to Extract data from a PDF File.

- How to open a PDF file.
- Extracting data from a GL Report, identifying a Base Layer.
- How to create a Standard Layer.
- How to Trap and use the Field Editor and name a Layer.
- How to Validate Data, Scanning for Errors.

3. Module Three – Advanced Topics for Report Reader Usage

- Extracting data from a Vet report via the Report Reader.
- Extracting data from a print report.
- How to use and edit a Template file, saving yourself time and effort.
- How to add data to an already existing database via an Append Layer.
- What is and how to use a Literal Trap.
- When to Use Value from Previous Record and what it does.
- When to edit a Template.

4. Module Four – Creating a Floating Layer for Inconsistent Data.

- What is a Floating Layer?
- Extracting from a complex Legal Billing Report with Floating Layer
- Display Width for fields vs. Actual Width, why change one and not the other.
- How to pull in an Append Layer
- What is a max values hyperlink.
- When to use Repeating Values for records.
- How to use the Edit Layer Manager and just how powerful it is.

Congratulations! You're done!