

Intermediate Monarch Learning Outcomes

Following are the performance objectives for participants in this training class. After successfully completing this class, you will be able to perform crucial fundamental operations and be able to:

Report View

- Know and use terminology necessary for working in Monarch at an intermediate level
- Be assured that you have a strong foundation of Monarch knowledge after reviewing key concepts
- Trap and extract data from non-standard reports containing a variety of inconsistencies. Understand how the clear field values feature can be one of the best solutions for a difficult report
- Apply Monarch's templates: *detail*, *append*, *header*, *footer*, effectively even in challenging situations. Recognize diverse layouts of report data in more complex reports and see the structure inherent in the data. Evaluate the structure and make appropriate decisions about constructing templates
- Use the *Auto Define Fields* feature as a diagnostic tool
- Use *Cleared By* to deal with intermittent data
- Use the advanced variable field option of *Preceding String* to capture intermittent data
- Combine the *Advanced Variable Field* options as needed to capture and extract "non-standard" data and data inconsistencies such as suppressed fields, multi-line sort levels, variable line addresses and wrapping fields
- Use the *Multi-Column Regions* feature to eliminate the problem of reports with side-by-side details
- Work around troublesome situations when there is no way to prevent unwanted data from being trapped
- Use the *Page Header* template in unexpected ways to correct page break problems
- Successfully complete several intermediate solo exercises
- Work with percentages both in the report and table view
- Recognize the need for and successfully employ advanced extraction traps such as *wild trap*, *postal trap*, *numeric/or trap*, *NOT trap*, and *floating traps*

Data View

- Work comfortably with functions and expressions to build *Calculated Fields*
- Perform custom sorting in the table by using *Lookup calculated fields*
- Better understand the importance of syntax ordering when creating a nested IF expression
- Create and apply *Compound filters* by selecting from a list of existing filters

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- Use *Value-based* filters
- Write complicated *nested expressions* to split, join and otherwise control table data
- Use a wide range of formula functions inherent in Monarch
- Create and apply custom *User-Defined* functions and make them available in other models
- Use multiple *Runtime calculated fields*
- Understand why filters must sometimes remain active at all times
- Work comfortably with dates and date conversions by adjusting the *Date Translation* Input Option
- Employ the *Test* feature to quickly check the accuracy and results of table expressions
- Split large complicated fields of data that could not be captured initially as separate fields
- Use *User Editable Fields* in unusual ways
- Make use of an unused blank area within a sample to extract a field using *preceding string*
- Demonstrate more expertise with the logical operators such as "AND", "OR" and "NOT", as well as parenthesis, brackets, quotes and braces into expressions
- Use the *Address Block* feature to split memo fields containing addresses into their individual components such as street, city, state, postal code
- Add documentation *Comments* to Objects
- Utilize advanced filter options to remove duplicate records from a table and to perform "top 10" analysis
- Perform a Project Export

Summary View

- Use *matching values* within a summary
- Use *Summary Design Preferences* to create and maintain consistent looks for existing and new summaries
- Utilize *wildcards* within a summary
- Incorporate table Filters into a Summary for targeted focus
- Use *Across Key* to achieve a different perspective
- Split summary exports by *distinct values of the first key*
- Use various summary tools such as *sorting*, *matching values*, and specifying ranges of summary data
- Maximize the effectiveness of summaries by using *exception coloring* to make value ranges "pop"

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Chart View

- Maximize the readability and effectiveness of Charts
- Float and Dock charts and other documents
- View multiple charts at one time
- Export Charts

Projects

- Create Projects that contain project exports, User Editable Fields, Import parameters and External Lookups.

Imports and External Lookups

- Perform an import to create a Monarch table populated by external data and then do an external lookup to link external fields to the table
- Combine two reports by exporting the first, opening the second and then linking the first to the second
- Select multiple linking values when one value is not adequate, and a combination of values is required to produce an sufficient degree of uniqueness in a one-to-many join

Object Linking

- Learn what Object Linking is and how to create links. Understand the three types of linking: weak link, strong link and no link

Lab Session

A lab session provided at the end of class is the time when learners' individual needs and questions can be addressed. Learners are encouraged to work on their own report data if they like, or to review lessons from the training manual. This reinforces the learning outcome in an individualized way for each student.