

## Advanced Monarch Data Extraction Learning Outcomes

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

### Report View

- Work within the Report View to review a source report and create the necessary *templates*
- Logically review and evaluate a source report and determine a *plan for data extraction*
- Successfully extract data from a variety of complex reports
- Input from *HTML* source files
- Input from *XPS* source files
- Open and work with *PDF source files* – customizing and adjusting PDF import options
- Set a variety of traps and apply them in combination
- Use the *auto-define fields* feature as a diagnostic tool to help identify incorrect traps
- Applying the *cleared-by* feature
- Work with reports containing *various date formats* such as MDY and YMD all within the same report
- Work with *various currency types* within one report
- Determine scenarios when the *NOT trap* should be used to pinpoint targeted data
- Know the importance of *page header templates* and their role in controlling inappropriate field and line breaks.
- Locate and select a *Multiline sample* to be used with a multi-line template
- Use Advanced Field Properties to build *Multiline fields*
- Deal with problematic report inconsistencies such as *variable line records*, *variable line fields* and *intermittent fields*
- Know what to try when the source report contains append fields that are needed in the Monarch table even though some of the append data may have no detail to append to.
- Perform an *External lookup* to bring external data into the Monarch table and use that data as a filter component
- Activate the *Floating Trap* setting to extract floating data and to parse that data into individual fields
- Know what to do when there appears to be no way to avoid trapping unwanted data
- Have general familiarity with the *Monarch Utility* and its uses
- Solve complex problems by working on solo class exercises

### Lab Session

A short 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 outcomes in an individualized way for each student.

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