IDEA® Training

Self-paced and conventional textbook learning can sometimes be difficult and time consuming whether you're mastering a language, new skill, or technology. Our instructor-led on-site and classroom training provides new and current IDEA® users with the momentum required to learn the basics, fine-tune existing skills, and master IDEA.

This document provides information on IDEA Training options and is intended for:

- Individuals seeking to start or advance a career using data analytics.
- Organizations looking to maximize their value by investing in world-class IDEA Training for their employees.

Why Invest in IDEA Training?

GET THE MOST FROM IDEA

We'll help you realize the full potential of IDEA and its application to real-world business challenges.

- Automate routine tasks and focus more effort on complex, high-value data analysis.
- Earn CPE credits.
- Identify trends in financial data.
- Profile customer data for improved sales and a reduction in bad debts.
- Identify breakdowns in communication between departments to eliminate waste and improve service.

IDEA Training for new hires and refresher training for veteran employees demonstrates a commitment to professional development. Many employees report that training leads to greater job satisfaction, productivity, and a strong intent to remain with an organization. It takes the best tools and skills to do any job well, but employees are often asked to use company software with little, if any, training. IDEA Training provides employees with the skills and confidence they need to make an impact organization-wide.

IDEA INSTRUCTOR-LED TRAINING IS EFFICIENT, EFFECTIVE, AND FOCUSED

The most diligent sole proprietors and contractors may find themselves inattentive and increasingly time-poor when they rely too heavily on textbook learning. Our instructor-led training is performance-based, learner-centric, and focuses on what you really need to know to be more productive.

IDEA TRAINING IS CONVENIENT AND FLEXIBLE

Training can be provided on-site at your location and offsite at training facilities across the globe. IDEA's applicability across a variety of disciplines and industries, including Internal and External Audit, Finance, Sales, and Information Technology, demonstrates a flexibility that benefits a diversity of roles and business objectives.

> IDEA training helps you realize IDEA's full potential and gain more value from your investment.

Our Instructors

> CaseWare courses are specifically designed to train data analytics professionals at all levels with tips and tricks, exercises, and case studies derived from real-life examples. I've developed extensive training material on a wide variety of topics and have experience instructing hundreds of auditors, and never before has my approach to training aligned so perfectly as with CaseWare's.
>
> - ***Sunder Gee**, CMA and CaseWare Certified Instructor*

Our CaseWare Certified Instructors are highly knowledgeable professionals in data analytics and workflow automation. Armed with real-world experience, they provide relevant and specific examples, tips, and tricks that help participants relate to the course material. New and experienced IDEA users typically tell us that they find our instructors very approachable and always on hand to answer any questions.

CaseWare ANALYTICS

Classroom Training

Although web-based training is becoming increasingly popular, most experts agree that classroom training provides a more dynamic and interactive experience for participants. We strive to provide the best learning environment for professional development and a practical classroom experience that is easily transferred to the office. Our courses are delivered in modern, centrally located training suites that provide a great learning environment. With access to social, cultural and recreational amenities, participants can network, unwind, and refresh following each training session.

Why consider classroom training?

- Eliminate the need to dedicate corporate space to training.
- Reduce or eliminate work-related distractions for participants.
- Provide participants the opportunity to share ideas and network with peers outside their professional circle.

CLASSROOM TRAINING IS A COST-EFFECTIVE OPTION FOR INDIVIDUALS AND SMALL GROUPS.

Confirmation of training, including a map of the location, will be faxed or emailed 10 business days in advance (upon receipt of payment).

On-site Training

On-site training at your location is a convenient, cost effective way of training a large group of employees or launching a company-wide training effort. Instruction can be customized to meet the needs of a team, department, or organization. A customized session based on your corporate data, for instance, makes training more relevant and retainable for staff.

Our goal is to foster consistency and cooperation while providing training that is both adaptable and economical. Instruction can be tailored to meet corporate needs and directly reflect the work environment.

Why consider on-site training?

- Train an entire team, department, or organization with one unified learning experience.
- Promote constructive team building and a strong sense of cooperation.
- Eliminate venue and employee travel costs.*
- Train more employees in less time.

ON-SITE TRAINING IS A COST-EFFECTIVE OPTION FOR MEDIUM TO LARGE GROUPS.

The engaging organization must provide an appropriate training venue, computers for all participants, a projector with connectivity, and a projector screen capable of delivering clear, undistorted viewing for the entire seating area. Training material, including manuals and course data files, will be shipped 10 business days in advance (upon receipt of payment). Installing IDEA Educational Edition on each participant's computer prior to the start date is recommended.

What We Offer

We offer three IDEA Data Analysis training courses and one preparatory course for IDEA users who are interested in becoming certified:

- CI101 - IDEA Data Analysis Level 1
- CI102 - IDEA Data Analysis Level 2
- CI104 - IDEAScript for Analysts Level 1
- CI105 - IDEAScript for Analysts Level 2
- CI201 - IDEA CIDA Exam Preparation
- CI203 - IDEA Advanced Sampling Techniques
- CI204 - IDEA Advanced Statistical Methods
- IS901 - IDEA Server Implementation

Each participant receives a training manual and the course data files.

For more information and to register, visit **www.casewareanalytics.com/training**

Get started.

CI101 **IDEA Data Analysis Level 1**
15 CPE Credits

The purpose of this two-day introductory course is to acquaint new users with the bulk of IDEA's basic functionality and breadth of tools. Training is immediately hands-on, so participants have the opportunity to quickly interact with the software by completing exercises and case studies using sample data.

After completing this training, participants will be able to:

- Understand the purpose and features of IDEA.
- Consider business objectives to which IDEA can be applied.
- Determine the data required and import the data.
- Use IDEA in Audit, Finance, and other industries to increase efficiency and effectiveness.
- Improve governance and controls, and reduce risk in their organization.

COURSE OUTLINE

Introducing IDEA	Auditing a General Ledger File
Managing Databases	Manipulating and Adding Fields
Obtaining and Importing Data	Building Equations
Reconciling and Examining Data	Using Multiple Databases
Isolating Specific Records	Working with Output
Profiling the Data	Recap Exercise
Identifying Irregularities	Documentation Standards
Sampling	Other Products
	Accessing Resources

PREREQUISITES

Working knowledge of Microsoft® Windows® desktop environment and Microsoft® Office® applications.

Advance your knowledge.

CI102 **IDEA Data Analysis Level 2**
15 CPE Credits

This two-day course is ideal for those who have completed the IDEA Data Analysis Level 1 training or have a sound understanding of IDEA functionality. Participants learn more advanced topics, such as creating complex equations or criteria, automating tasks and Benford's Law.

After completing this training, participants will be able to:

- Expand their use of data analytics in Audit, Finance, and other industries.
- Apply advanced data analytics techniques and best practices.
- Automate data analytics.
- Improve governance and controls, and reduce risk in their organization.

COURSE OUTLINE

Advanced Data Profiling using Benford's Law	Introduction to Automation in IDEA
Advanced Imports	Case Study – Independent Study
Advanced Extractions	
Connecting Multiple Databases	Case Study – Management Report
Advanced @Functions	
Custom Functions	

PREREQUISITES

Working knowledge of Microsoft® Windows® desktop environment and Microsoft® Office® applications. Familiarity with CI101 course topics. Completion of CI101 is recommended.

With completion of CI101 and CI102, you are eligible for CIDA certification. Visit **www.casewareanalytics.com/certification** for more information.

CaseWare ANALYTICS

Automate workflows.

CI104 **IDEAScript for Analysts Level 1**
15 CPE Credits

This two-day course introduces experienced users to the fundamentals of programming and more advanced topics devoted to workflow automation with IDEAScript macros. IDEAScript, the IDEA programming language behind IDEAScript macros, is similar to and compatible with Visual Basic for Applications, the macro language used in Excel®, PowerPoint®, Word®, Access® and other Microsoft® Office® applications.

After completing this training, participants will be able to:

- Read and understand the logic of IDEAScripts
- Automate repetitive tasks, such as importing files
- Create special tests and functions

COURSE OUTLINE

Introducing IDEAScript	Customizing a macro
Recording a macro	Using the language browser
Understanding IDEAScript syntax	Functions and sub-routines
Working with macro	Case study

PREREQUISITES

- Working knowledge of IDEA
- Familiarity with CI101 and CI102 course topics
- Completion of CI101 and CI102 is recommended

Gain recognition.

CI105 **IDEAScript for Analysts Level 2**
7.5 CPE Credits

This one-day course is ideal for those who have completed the IDEAScript for Analysts Level 1 training or who already have a sound understanding of programming principles. Participants learn more advanced features such as how to use arrays, create customized dialog boxes, and how to handle errors.

After completing this training, participants will be able to:

- Use arrays to populate controls
- Create customized dialog boxes
- Implement error handling

COURSE OUTLINE

Array handling	Error validation
Creating dialog boxes	Case study

PREREQUISITES

- Familiarity with CI101 course topics and understanding of programming control structures
- Completion of CI104 is recommended

With completion of CI104 and CI105, you are eligible for CISE certification. Visit **www.casewareanalytics.com/certification** for more information.

Gain recognition.

CI203 **IDEA Advanced Sampling Techniques**
3.5 CPE Credits

This half-day course is intended to give participants an overview of statistical sampling in IDEA. It will also provide an introduction to the tools used to run Attribute Sampling and Monetary Unit Sampling using the tools in IDEA.

After completing this training, participants will be able to:

- Understand the distinction between both sampling types
- Effectively run each type of sampling task

COURSE OUTLINE

Monetary unit sampling
Attribute sampling
Statistical (classical variable) sampling

PREREQUISITES

- Familiarity with CI101 course topics and an understanding of statistics
- Completion of CI101 is recommended

Gain recognition.

CI204 **IDEA Advanced Statistical Methods**
3.5 CPE Credits

This half-day course is intended to provide an overview of the tools in IDEA used to identify trends and project future values. These tools can be used as a component of a continuous monitoring set of routines.

After completing this training, participants will be able to:

- Understand the concept of grouping as applied to an audit unit
- Execute Correlation, Time Series and Trend Analysis

COURSE OUTLINE

Time series analysis
Trend analysis
Correlation analysis

PREREQUISITES

- Familiarity with CI101 course topics and an understanding of statistics
- Completion of CI101 is recommended

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Gain recognition.

CI201 **IDEA CIDA Exam Preparation**

This one-day course was developed to refresh long-time IDEA users and people that took the required training but want to be better prepared to write the Certified IDEA Data Analyst (CIDA) exam. This course was written using the concept of a case study to cover most of the core functionality of IDEA and focus on the content and the style of the CIDA exam.

After completing this training, participants will be able to:

- Use IDEA tasks in the context of their daily work.
- Write the CIDA exam.
- Apply data analytics in a real-life situations.

COURSE OUTLINE

Importing and Reconciling Project Data	Identifying Irregularities and Using Field Manipulation
Profiling and Isolating Payment Data	Summarizing Data and Working with Multiple Files

PREREQUISITES

Working knowledge of IDEA or completion of CI101 and CI102 training.

Gain recognition.

IS901 **IDEA Server Implementation** **7.5 CPE Credits**

This one-day course is intended to provide an overview of the features and tools available in IDEA Server. Participants will learn how IDEA Server can increase productivity, data security and collaboration.

After completing this training, participants will be able to:

- Describe IDEA Server and related components
- Configure and administer an IDEA Server installation
- Understand how IDEA Server manages projects and content
- Understand security measures

COURSE OUTLINE

Installation and configuration	Content management
Corporate license manager administration	IDEA Server security
IDEA Server administration	Configuring ODBC connectivity
	Case study

PREREQUISITES

- Working knowledge of IDEA

Cancellation Policy

CaseWare IDEA Inc. requires notice of cancellation no later than 10 business days before the training start date. If less than 10 business days' notice is given, 50% of the training fee will be refunded up to three business days before the training start date. No refund is possible if notice of cancellation is received less than three business days before the training start date. There is no charge for course substitutions.

CaseWare IDEA retains the right to cancel training courses when the minimum number of participants has not been reached. Full refunds will be made should such cancellation be required.

CaseWare Analytics is home to IDEA® Data Analysis and the CaseWare Monitor continuous monitoring platform. Our software solutions are built on a foundation of industry best practices and expertise, enabling audit, compliance and finance professionals to assess risk, gather audit evidence, uncover trends, identify issues and provide the intelligence needed to make informed decisions, ensure compliance and improve business processes. We offer solutions that meet the needs of auditors, analysts, purchasing card managers, compliance officers and more. With 40 distribution offices worldwide, CaseWare Analytics' products and solutions serve more than 400,000 professionals in 90 countries. To learn more visit casewareanalytics.com

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