



2018 Longview Course Curriculum

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Introduction

This Longview course curriculum has been designed to provide an overview of our course offerings, content, delivery timing, and structure. This guide is intended to enable customers to select the appropriate Longview courses to meet their operational needs. Please register for courses and see upcoming dates by visiting:

<http://www.longview.com/services/learning/>

If you'd like to discuss the following options:

- *Customized courses versus generic courses*
- *On-site at your location*
- *Course scheduling*
- *Participant numbers identified by course/role*

or if you have any questions or comments regarding this course curriculum or other learning material, please contact:

Maria Chace

Manager, Learning Services

mchace@longview.com

1-905-940-1510

Accreditation

Longview is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org



Refund/Cancellation Policy

If you wish to cancel, you must inform Longview Learning at least 14 days in advance of the start date, and we will gladly re-schedule or refund your training. If you cancel within less than 14 days prior to the training start date, you must reschedule and attend a training class within 6 months of the original class date or the funds will be forfeited. If you fail to attend without informing Longview Learning in advance, the full course fee will be charged (i.e. no credits and no re-scheduling).

If Longview Learning cancels or reschedules a class, we will provide at least 1-week notice to students and will not invoice fees for the original class and/or work with students to schedule the class for a mutually acceptable date.

All training services are subject to the Longview Training Services Agreement at <http://www.longview.com/services/learning/longview-training-services-agreement>.

Complaint Resolution Policy

If you have concerns or complaints regarding a learning session, please feel free to express yourself with the course evaluation forms, which will be provided at the end of the training session. If you wish to escalate further, please contact Maria Chace, Manager of Learning Services: mchace@longview.com.

Delivery Methods

There are multiple methods of delivery for many of the courses:

GROUP LIVE WORKSHOP

! Look for this symbol



An instructor leads a class using methods such as lecture, demonstration, and guided demonstration. Students perform tasks on a live Longview application in a classroom setting.

GROUP INTERNET BASED – INSTRUCTOR LED CLASSROOM

! Look for this symbol



An instructor leads a class using the same methods as a classroom workshop, but students are remote. Students perform tasks on a live Longview application remotely. The primary difference is that students connect to the virtual classroom through an internet browser and a toll-free conference call.

SELF STUDY

! Look for this symbol

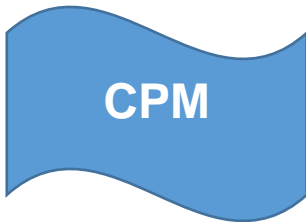


A student completes self-paced eLearning during the term of a subscription. Students are provided an individualized login and password to the Longview eLearning website. Content is available for their review for the entire span of their subscription.

Courses by Solution Area

Courses are listed by the four (4) Longview areas: Corporate Performance Management (CPM), Tax, Longview Analytics (Analytics), and Tidemark.

Courses are color coded in this guide to identify the Longview area:



Longview eLearning Library

Who should take this course?

This on-demand, interactive collection of hundreds of targeted learning modules is designed for Longview System Administrators, Analysts, and other users of the Longview system.

Learning Objectives

- Introduction to Longview
- Consolidation
- Expanding and Collapsing Symbols
- Home Page
- Longview Performance Manager
- Queries in A&R
- Creating Reports
- Running Templates and Batches
- Report Viewer
- Workflow
- Input for Contributors
- Web Input
- Input Apps in Longview 7.3
- Data Tables in Longview 7.3
- Longview for Excel
- Foreign Exchange
- Intercompany
- Journal Entries
- Symbol Selector
- Longview Add-In for Office
- Longview Component Manager
- Longview Application Administrator
- User and Group Maintenance
- Symbols
- Symbol Access Maintenance
- Attribute Maintenance
- Schedule Maintenance
- Intercompany
- Foreign Exchange
- Importing Data (in Desktop)
- Longview Server Manager
- Longview Server Rules
- Longview Analysis & Reporting
- Longview Input
- Input Apps for Longview 7.3 (for System Administrators)
- Longview Dashboard Designer
- Longview Workflow Designer
- Longview Designer
- Longview Mappings
- Longview Data Imports
- Longview Performance Manager (for System Administrators)

Course Details

Duration

1 year access

Materials Provided

Access to eLearning modules

Delivery Method



Annual Subscription

Users (Up to)	Cost (local currency)
10	3,500
25	6,000
50	8,500
100	12,500
200	20,000

Hands-on: 60%

For additional user subscription pricing, contact: learning@longview.com

Longview Analyst

Course Code: LVCPMANALYST

Program Level: Basic

Field of Study: Specialized knowledge

Who should take this course?

This course is designed for individuals who will be end users working with the Longview application.

Learning Objectives

- The features and capabilities of the software, and the procedures required to perform standard end user tasks
- Navigating and launching web reports and input apps from Longview Close
- Inputting, submitting, and importing data
- Creating and formatting reports
- Creating data queries and reports using Longview Add-in-for Office
- Posting journal entries and running journal entry reports
- Using the workflow process for approval processes

Agenda

Day 1

- Intro to Longview
- Using Longview Close
- Running Reports
- Running Data Import Apps
- Using Input Apps

Day 2

- Longview Analysis & Reporting
- Using Batches with Analysis & Reporting
- Longview Add-in for Office
- Journal Entries
- Approval Workflow

Course Details

Duration

Two days (9am - 5pm)



Materials Provided

Resource and Task Guide

Pre-Requisites

- Familiarity with Finance Principles
- Basic knowledge of Microsoft Excel

Fees

Delivery Method	Cost (local currency)
 Group Live	2,350 per person or 9,400 for up to 10 people, plus expenses
 Group Internet Based - Instructor Led	2,350 per person or 9,400 for up to 6 people

CPE Credits: 14.5

Hands-on: 60%

Longview Application Administrator

Course Code: LVCPMADMIN

Program Level: Intermediate

Field of Study: Specialized knowledge

Who should take this course?

This course is designed for individuals who will be functional administrators of the Longview application.

Learning Objectives

- Adding or editing symbols within the various dimensions
- Creating users, assigning users to groups, and maintain user and system security settings
- Maintaining intercompany elimination settings
- Configuring Foreign Exchange and maintaining translation settings
- Creating data imports to allow for the importing of flat files
- Creating input apps to allow for manual entry of data
- Building and publishing report templates
- Running restatements, retrieving monitor files, stopping and starting servers
- Building Approval Workflow processes by defining data areas, and assigning owners and approvers

Agenda

Day 1

- Longview Application Administrator
- Hierarchy Maintenance
- User and Group Maintenance
- Symbol Access Maintenance
- Intercompany Eliminations

Day 2

- Foreign Exchange Maintenance
- Data Imports
- Data View Input Apps
- Creating and Publishing Reports in Analysis & Reporting
- Approval Workflow
- Server Manager

Course Details

Duration

Two days (9am - 5pm)



Materials Provided

Resource and Task Guide

Pre-Requisites

- Successful completion of the Longview Analyst course
- Familiarity with Finance Principles
- Basic knowledge of Microsoft Excel

Fees

Delivery Method	Cost (local currency)
 Group Live	2,350 per person or 9,400 for up to 10 people, plus expenses
 Group Internet Based - Instructor Led	2,350 per person or 9,400 for up to 6 people

CPE Credits: 14.5

Hands-on: 60%

Creating Input Apps Using Longview Designer

Course Code: LVCPMDVIINT

Program Level: Intermediate

Field of Study: Specialized knowledge

Who should take this course?

This course is designed for Finance users who wish to gain exposure to developing Longview Data View Input Apps using the Longview Designer technology.

Learning Objectives

- Setting up and running a simple Longview App
- Adding both simple and advanced formatting
- Importing data via a file into the App
- Introducing the concept of variables to add flexibility
- Running simple models to manipulate data within the App
- Introducing basic Application Framework syntax to enhance the App

Agenda

Day 1

- Creating a Simple Data View Input App
- Adding Simple Formatting to your App
- Symbol Specifications
- Adding Advanced Formatting to your App
- Creating Tabs in your App
- Importing Data into your App
- Adding Instructions
- Using Variables

Day 2

- Adding User Selections
- Adding Dynamic Symbol Selections Using Variables
- Adding a Simple Model
- Adding a Transfer Model

Course Details

Duration

Two days (9am - 5pm)



Materials Provided

Task Guide

Pre-Requisites

- Successful completion of the Longview Analyst course

Fees

Delivery Method	Cost (local currency)
 Group Live	2,350 per person or 9,400 for up to 10 people, plus expenses
 Group Internet Based - Instructor Led	2,350 per person or 9,400 for up to 6 people

CPE Credits: 14.5

Hands-on: 60%

Longview Add-In for Office

Course Code: LVXL

Program Level: Intermediate

Field of Study: Specialized knowledge

Who should take this course?

This course is designed for individuals who want to work with their Longview data within Microsoft Excel.

Learning Objectives

- The different types of queries in the Longview database and how to perform them
- Improving the formatting of your data queries by using built-in Longview cell styling
- Using the various Longview functions to facilitate the building of custom workbooks within Excel
- Submitting data from an Excel workbook
- Using features like symbol selectors and combo boxes with Longview data to improve usability of your Excel workbooks

Agenda

Day 1 – Half Day

- Data Queries
- Longview Cell Styles
- Symbol Queries
- Attribute Queries

Day 2 – Half Day

- Longview Add-In for Office Functions
- Building a custom workbook with Longview data
- Cell-Triggered Symbol Selectors
- Submitting Data

Day 3 – Half Day

- Excel Combo Boxes
- Longview Add-In for Office Projects

Course Details

Duration

Three half days (10am – 2pm)


Materials Provided

Resource and Task Guide

Pre-Requisites

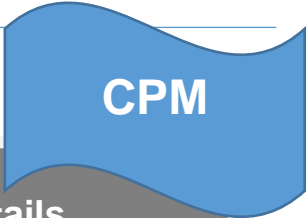
- Successful completion of the Longview Analyst course
- Basic knowledge of Microsoft Excel

Fees

Delivery Method	Cost (local currency)
 Group Internet Based – Instructor Led	1,500 per person or 6,000 for up to 6 people

CPE Credits: 11

Hands-on: 60%



Longview Application Framework with Smart Client

Course Code: LVCPMAFD

Program Level: Advanced

Field of Study: Specialized knowledge

Who should take this course?

This course is designed for individuals who are responsible for the development of advanced Longview applications and processes. This course teaches Longview's Application Framework language using Longview Designer technology.

Learning Objectives

Application Framework

- The Application Framework syntax through various hands-on programming exercises
- Defining and utilizing Symbol Specifications to improve flexibility and maintenance efforts in logic codes
- Coding customized Procedure documents, given a set of logic requirements
- Data Area Definition and Model documents – invoked by Procedure documents
- Importing data using a data import App
- Creating and defining Data Event Rules
- Advanced commands and debugging practices

Designer

- Setting up and running a simple Longview App
- Adding both simple and advanced formatting
- Making use of variables in the App to add flexibility
- Importing data via a file into the App
- Running models to manipulate data within the App
- Utilizing forms to accept user input and pass these into the App
- Creating a Data Table App

Course Details

Duration

Five days (9am - 5pm)


Materials Provided

Task Guide

Pre-Requisites

- Successful completion of the Longview Application Administrator course
- Coding experience is recommended but not required

Fees

Delivery Method	Cost (local currency)
 Group Live	Onsite: 4,000 per person or 16,000 for up to 10 people, plus expenses
	At Longview: 4,000 per person or 16,000 for up to 10 people

CPE Credits: 40

Hands-on: 60%

Agenda

Day 1

- Intro to Application Framework
- Syntax Formatting Standards
- Longview Symbol Specifications
- Variables
- Procedure Commands and Functions

Day 2

- Data Area Definitions and Data Areas
- Building Models

Day 3

- Creating Data Import Apps
- Creating Mapping Tables
- Data Event Rules

Day 4

- Creating a Simple Data View Input App
- Adding Formatting to your App
- Creating Tabs in your App
- Importing Data into your App
- Adding Instructions
- Adding User Selections

Day 5

- Adding a Simple Model
- Creating a Form
- Creating a Data Table App

Creating Designer Input Apps for the Advanced User

Course Code: LVCPMDVIADV

Program Level: Advanced

Field of Study: Specialized knowledge

Who should take this course?

This course is designed for Application Framework experienced individuals who wish to gain exposure to Longview Data View Input Apps using the Longview Designer technology. This course utilizes Application Framework to add enhancements.

Learning Objectives

- Setting up and running a simple Longview App
- Adding both simple and advanced formatting
- Importing data via a file into the App
- Making use of variables in the App to add flexibility
- Running models to manipulate data within the App
- Utilizing forms to accept user input and pass these into the App

Agenda

Day 1

- Creating a Simple Data View Input App
- Adding Formatting to your App
- Creating Tabs in your App
- Importing Data into your App
- Adding Instructions
- Adding User Selections
- Adding Symbol Selections using Variables
- Adding a Simple Model
- Creating a Form

Course Details

Duration

One day (9am - 5pm)


Materials Provided

Task Guide

Pre-Requisites

- Successful completion of the Longview Application Framework course
- Longview Application Framework experience

Fees

Delivery Method	Cost (local currency)
 Group Internet Based – Instructor Led	1,350 per person or 5,400 for up to 6 people

CPE Credits: 7

Hands-on: 60%

Creating Data Table Apps Using Longview Designer

Course Code: LVCPMDTI

Program Level: Advanced

Field of Study: Specialized knowledge

Who should take this course?

This course is designed for Application Framework experienced individuals who wish to gain exposure to developing Longview Data Table Input Apps using the Longview Designer technology. This course utilizes Application Framework to add enhancements.

Learning Objectives

- Setting up and running a simple Data Table Input App
- Adding both simple and advanced formatting
- Importing data via a file into the data table
- Adding calculations to manipulate data within the data table

Agenda

Day 1 – Half Day

- Setting up app tables within SQL Server
- Creating a Simple Data Table Input App
- Adding Formatting to your App
- Importing Data into your App
- Adding a Simple Calculation
- Other Formatting

Course Details

Duration

Half day (4 hours)


Materials Provided

Task Guide

Pre-Requisites

- Successful completion of the Longview Application Framework course
- Successful completion of Creating Input Apps for the Advanced User or Creating Input Apps Using Longview Designer
- Longview Application Framework experience

Fees

Delivery Method	Cost (local currency)
 Group Internet Based – Instructor Led	700 per person or 2,800 for up to 6 people

CPE Credits: 4

Hands-on: 60%

Designer for the Advanced User

Course Code: LVCPMDAFADV

Program Level: Advanced

Field of Study: Specialized knowledge

Who should take this course?

This course is designed for individuals who wish to gain exposure to the capabilities of Longview Designer. This course heavily relies upon Longview's Application Framework configuration language.

Learning Objectives

- Creating, formatting, and running a Data View Input App
- Creating, formatting, and running a Data Table Input App
- Creating and triggering a Data Driven Event
- Manually running an Event
- Creating and running a Free Form App
- Utilizing an Additional Configuration Library
- Understanding the capabilities of Longview Designer
- Understanding the use of the templates provided with Longview Designer

Agenda

Day 1

- Data Input Apps:
 - Creating a Simple Data View Input App
 - Adding Formatting to your App
 - Creating Tabs in your App
 - Importing Data into your App
 - Adding Dynamic User Selections
 - Adding a Simple Model
 - Creating a Form

Day 2

- Data Table Apps:
 - Setting up app tables
 - Creating a Simple Data Table Input App
 - Adding Formatting to your App
 - Importing Data into your App
 - Adding a Simple Calculation
 - Other Data Table Formatting

Course Details

Duration

Three days (9am - 5pm)



Materials Provided

Task Guide

Pre-Requisites

- Successful completion of the Longview Application Framework course
- Longview Application Framework experience

Fees

Delivery Method	Cost (local currency)
 Group Live	3,500 per person or 14,000 for up to 10 people, plus expenses
 Group Internet Based - Instructor Led	3,500 per person or 14,000 for up to 6 people

CPE Credits: 22

Hands-on: 60%

- Data Events:
 - Creating a Manually Run App
 - Converting the App into a Data Event
 - Creating an Event Rule

Day 3

- Data Events:
 - Setting up and running a manual trigger for the Data Event
- Creating a Free Form App
- Utilizing the Additional Configuration Library to Create a Flexible App

LVIS for Longview: Administration

Course Code: LVLVIS

Program Level: Intermediate

Who should take this course?

This course is designed for individuals who are administrators of LVIS, those who monitor or design LVIS integrations, as well as end-users.

You will learn about...

- Artifacts – the building blocks of an Integration
- Monitoring Integrations
- Deployment of Integrations
- The administration of Actian
- Macros

Agenda

- Using Actian Data Integrator
- Software Development Life Cycle
- Manager Application
- Integrations
- Scheduling
- Monitoring
- Logging and Reporting
- Macros and Macrosets
- User Maintenance
- Web Services
- Troubleshooting

Course Details

Duration

Two days (9am - 5pm)



Materials Provided

Resource and Task Guide

Pre-Requisites

- Successful completion of Longview Application Administrator course
- Coding experience is recommended but not required

Fees

Delivery Method	Cost (local currency)
 Group Live	2,350 per person or 9,400 for up to 10 people, plus expenses
 Group Internet Based – Instructor Led	2,350 per person or 9,400 for up to 6 people

CPE Credits: 14.5

Hands-on: 50%

Analytics for Longview Close

Course Code: LVANALYTICSCLOSE

Program Level: Intermediate

Field of Study: Specialized knowledge

Who should take this course?

This course is designed for Longview Close users who will be responsible to create, modify, and publish Analytics reports.

Learning Objectives

- Creating new reports and modifying existing reports
- Including calculations in reports
- Creating charts
- Publishing reports
- Performing user administration related to report navigation

Agenda

Day 1

- Administration – roles and navigation hierarchies
- Assign properties and functionality to a report
- Create reports
- Include objects in a report
- Create calculations in a report
- Connect multiple reports

Day 2

- Modify reports
- Create versions of a report
- Add items to an existing report
- Remove or modify items in an existing report
- Publish reports

Day 3 and 4 - Optional Workshop

- Attend this optional workshop to work with customer specific reports using your own data and hierarchies

Course Details

Duration

Two days (9am - 5pm)



Materials Provided

Resource and Task Guide



Pre-Requisites

- Working knowledge of the Longview Close application

Fees

Delivery Method	Cost (local currency)
 Group Live	2,350 per person or 9,400 for up to 10 people, plus expenses
 Group Internet Based – Instructor Led	2,350 per person or 9,400 for up to 6 people

Optional workshop fee:

Delivery Method	Cost (local currency)
 Group Live	2,350 per person or 9,400 for up to 10 people, plus expenses
 Group Internet Based – Instructor Led	2,350 per person or 9,400 for up to 6 people

CPE Credits: 14.5

Hands-on: 60%

Longview Tax eLearning Library

Who should take this course?

This on-demand, interactive collection of hundreds of targeted learning modules is designed for Longview Tax System Administrators, End Users, and other users of the Longview Tax system.

Learning Objectives

- Longview Tax Introduction
- Modifying Display Details in Input Apps and Reports
- Longview Input Apps
- Longview Analysis and Reporting
- Administrative Settings Reports
- Calculation Reference Reports
- National Annual Provision Process
- Regional Actual Provision Process
- National Interim Provision Process
- Regional Interim Provision Process
- Longview for Excel
- Longview Add-In for Office
- Longview Tax Admin Introduction
- System Settings
- The Entities Editor
- The Net Income before Tax Editor
- The Book-Tax Difference Editor
- The Current and Deferred Tax Editor
- The Tax Account Roll Forward Data Transfer Editor
- The Interim Accounts Editor
- Entity and Account Settings
- Currencies Editor and Foreign Exchange
- Longview Tax Information Distribution
- Locks and User Submissions
- Users and Groups
- Loader Files
- Loading Trial Balance Data
- NIBT Adjustment Accounts
- Tax Calculations
- Events
- Events Status
- Log, History, and Error Files
- Symbol Maintenance
- Longview Analysis and Reporting
- Creating Reports
- System Rollover
- Server Manager

Course Details

Duration

1 year access

Materials Provided

Access to eLearning modules

Delivery Method



Annual Subscription

Users (Up to)	Cost (local currency)
1-2	1,500
3-5	3,000
6-10	4,000

Hands-on: 60%

For additional user subscription pricing, contact: learning@longview.com

Longview Tax Analyst

Course Code: LVTAXANALYST

Program Level: Basic

Field of Study: Specialized knowledge

Who should take this course?

This course is designed for individuals who will be performing a Tax Provision using the Longview Tax solution.

Learning Objectives

- The features and capabilities of Longview Tax
- The functionality included in the standard "out of the box" product
- About ABC Company's Annual Provision from A to Z
- How to prepare the system for next year's tax provision

Agenda

Day 1

- Longview Basics and Navigation
- Data Input and Review
- Tax Provision Process (Federal and State)
- Interim Provision Process
- Using Scenario
- Introduction to Longview Add-In for Office

Course Details

Duration

One day (9am - 5pm)



Materials Provided

Resource and Task Guide

Pre-Requisites

- None

Fees

Delivery Method	Cost (local currency)
 Group Live	900 per person or 3,600 for up to 10 people, plus expenses
 Group Internet Based - Instructor Led	900 per person or 3,600 for up to 6 people

CPE Credits: 7

Hands-on: 60%

Longview Tax Administrator

Course Code: LVTAXADMIN

Program Level: Intermediate

Field of Study: Specialized knowledge

Who should take this course?

This course is designed for Longview Tax users who will be participating in a Longview Tax implementation project and/or maintaining the Tax application.

Learning Objectives

- The administrative features and capabilities of Longview Tax
- Using the Longview Tax Client
- Maintaining your Longview Tax application
- How to prepare the system for next year's Tax provision

Agenda

Day 1

- Longview Basics and Navigation
- Entity Maintenance
- Currency Maintenance
- Updating the Chart of Accounts
- Tax Provision Accounts Maintenance
- Automation Groups
- Tax Account Rollforward maintenance

Day 2

- Load Data
- Monitoring Submissions and Tax Calculations
- Regional Provision Considerations
- User and Group Maintenance
- Rollover and Scenario Setup
- Report Publishing
- Recalculating the system
- Monitoring Longview Tax Server
- Backing up Longview Tax
- Managing Log Files

Course Details

Duration

Two days (9am - 5pm)



Materials Provided

Resource and Task Guide

Pre-Requisites

- Successful completion of the Tax Analyst course
- Familiarity with Tax Principles
- Basic knowledge of Microsoft Excel

Fees

Delivery Method	Cost (local currency)
 Group Live	1,600 per person or 6,400 for up to 10 people, plus expenses
 Group Internet Based - Instructor Led	1,600 per person or 6,400 for up to 6 people

CPE Credits: 14.5

Hands-on: 60%

Longview Add-In for Office for Tax

Course Code: LVXLTAX

Program Level: Intermediate

Field of Study: Specialized knowledge

Who should take this course?

This course is designed for individuals who want to work with their Longview data within Microsoft Excel.

Learning Objectives

- The different types of queries in the Longview database and how to perform them
- Improving the formatting of your data queries by using built-in Longview cell styling
- Using the various Longview functions to facilitate the building of custom workbooks within Excel
- Submitting data from an Excel workbook
- Using features like symbol selectors and combo boxes with Longview data to improve usability of your Excel workbooks

Agenda

Day 1 – Half Day

- Data Queries
- Longview Cell Styles
- Symbol Queries
- Attribute Queries

Day 2 – Half Day

- Longview Add-In for Office Functions
- Building a custom workbook with Longview data
- Cell-Triggered Symbol Selectors
- Submitting Data

Day 3 – Half Day

- Excel Combo Boxes
- Longview Add-In for Office Projects

Course Details

Duration

Three half days (10am - 2pm)


Materials Provided

Resource and Task Guide

Pre-Requisites

- Successful completion of the Tax Analyst course
- Basic knowledge of Microsoft Excel

Fees

Delivery Method	Cost (local currency)
 Group Internet Based – Instructor Led	1,500 per person or 6,000 for up to 6 people

CPE Credits: 11

Hands-on: 60%

Implementing Longview Tax

Course Code: LVTAXIMP

Program Level: Intermediate

Field of Study: Specialized knowledge

Who should take this course?

This course is designed for Tax Service Providers who will be participating in or leading a Longview Tax implementation project.

Learning Objectives

- Taking a post-launch database and building an application
- Building and publishing Longview Reports
- Setting up your Tax provision
- Creating entities, currencies, and users

Agenda

Day 1

- Basic Concepts
- Provision Process and Data Flow
- New Longview Homepage and Longview Tax
- System Setup Group Exercise
- Database setup
- Pre-design package
- System Settings Editor, Currency Editor, User Editor
- Create Hierarchies, Jurisdictions
- Entity Parameters
- Create Partnership and Corporate Owners
- Entities Editor
- Chart of Accounts Structure
- NIBT Editor
- Book-Tax Difference Structure, Parameters, Editor
- Current and Deferred Tax Editor
- National and Regional Tax Rates
- Chart of Accounts Data

Day 2

- System Setup Group Exercise continued
- Results of Automation
- Complete Income Tax Provision
- Review and Discussion of Interim Provision
- Considerations
- Features and Options

Course Details

Duration

Three days (9am - 5pm)



Materials Provided

Resource and Task Guide

Pre-Requisites

- Successful completion of the Tax Administrator course

Fees

Delivery Method	Cost (local currency)
 <p>Group Live</p>	3,000 per person or 12,000 for up to 10 people, plus expenses
 <p>Group Internet Based - Instructor Led</p>	3,000 per person or 12,000 for up to 6 people

CPE Credits: 22

Hands-on: 60%

- System Settings
- Entity Level Settings
- Interim Accounts Editor
- Interim Provision Process
- Building Longview Input Apps

Day 3

- Building and Publishing Longview Reports
- User and System Security
- Scenarios and Roll Over
- Excel Add-In
- Standard Configuration Tasks

Analytics for Longview Tax

Course Code: LVANALYTICSTAX

Program Level: Intermediate

Field of Study: Specialized knowledge

Who should take this course?

This course is designed for Longview Tax users who will be responsible to create, modify, and publish Analytics reports.

Learning Objectives

- Creating new reports and modifying existing reports
- Including calculations in reports
- Creating charts
- Publishing reports
- Performing user administration related to report navigation

Agenda

Day 1

- Administration – roles and navigation hierarchies
- Assign properties and functionality to a report
- Create reports
- Include objects in a report
- Create calculations in a report
- Connect multiple reports

Day 2

- Modify reports
- Create versions of a report
- Add items to an existing report
- Remove or modify items in an existing report
- Publish reports

Day 3 and 4 - Optional Workshop

- Attend this optional workshop to work with customer specific reports using your own data and hierarchies.

Course Details

Duration

Two days (9am - 5pm)



Materials Provided

Resource and Task Guide



Pre-Requisites

- Working knowledge of the Longview Tax application

Fees

Delivery Method	Cost (local currency)
 Group Live	2,350 per person or 9,400 for up to 10 people, plus expenses
 Group Internet Based – Instructor Led	2,350 per person or 9,400 for up to 6 people

Optional workshop fee:

Delivery Method	Cost (local currency)
 Group Live	2,350 per person or 9,400 for up to 10 people, plus expenses
 Group Internet Based – Instructor Led	2,350 per person or 9,400 for up to 6 people

CPE Credits: 14.5

Hands-on: 60%

Longview Analytics eLearning Library

Who should take this course?

This on-demand, interactive collection of targeted learning modules is designed for all users on the use of Longview Analytics software for business intelligence, analysis, and planning applications. These learning modules are applicable for Power Users, project managers, application designers, and technical users.

Learning Objectives

- Company and product presentation
- Analytical requirements and the corresponding solutions
- Business analytics options
- Mobile and the DORA concept (“Design once, Run anywhere”)
- Components of the Enterprise Architecture and 3rd Party Integration
- Application Server
- Administration Console
- Application Designer
- Introduction of the Enterprise Help
- Creating a new application
- Working with toolbars
- Options for formatting and visualization
- Graphic design
- Use of administration and calculation formulas
- Creating new database connections for OLAP and ODBC databases
- Creating customized applications meeting individual company requirements.
- Specific exercises to create dynamic, easy to maintain Enterprise applications based on OLAP and ODBC databases
- Designing customized reports meeting individual company requirements
- Specific exercises based on OLAP and ODBC databases
- Designing customized reports meeting individual company requirements
- Specific exercises based on OLAP and ODBC databases
- How to create informative applications for different devices in a comprehensive, efficient, and target group driven manner
- An introduction in the HICHERT@SUCCESS design rules and HICHERT@IBCS Standards

Course Details

Duration

1 year access

Materials Provided

Access to eLearning modules

Delivery Method



Annual Subscription

Users (up to)	Cost (local currency)
10	3,500
25	6,000
50	8,500
100	12,500
200	20,000

Hands-on: 60%

For additional user subscription pricing, contact: learning@longview.com

Longview Analytics Introduction

Course Code: LVANALYTICSINTRO

Program Level: Basic

Field of Study: Specialized knowledge

Who should take this course?

This Introduction training course introduces you to Longview Analytics and how it can be used for business intelligence, analysis and planning applications. This course is applicable for Power Users, Project managers, Application Designers, and Technical Users.

Learning Objectives

- The Longview Analytics product offerings, including the Enterprise solution
- How to create new database connections for OLAP and ODBC databases
- Application Designer, Longview Analytics' development environment, which will help you build your applications and given an overview of the implementation requirements

Agenda

Day 1

- Analytical requirements and the corresponding solutions
- Business analytics options
- Longview Analytics Mobile and the DORA concept (“Design once, Run anywhere”)
- Longview Analytics Edge (Budgeting and Planning)
- Longview Analytics Engage (Self-service Longview Analytics platform)
- Longview Analytics Excel Analytics (Self-service Analytics)
- Application Framework
- Interfaces and Standards
- Requirements for the implementation of an enterprise-wide information system
- Components of Longview Analytics Enterprise
- Application Designer (Development environment)

Course Details

Duration

One day (9am - 5pm)



Materials Provided

Student Guide

Pre-Requisites

- None

Fees

Delivery Method	Cost (local currency)
 Group Live	1,175 per person or 4,700 for up to 10 people, plus expenses
 Group Internet Based – Instructor Led	1,175 per person or 4,700 for up to 6 people

CPE Credits: 7

Hands-on: 60%

Longview Analytics Report Design I

Course Code: LVANALYTICSRD1

Program Level: Basic

Field of Study: Specialized knowledge

Who should take this course?

This course is designed for users who wish to design reports, such as Power Users, project managers, application designers, and technical users.

Learning Objectives

- Designing customized reports meeting individual company requirements
- Specific exercises based on OLAP and ODBC databases

Agenda

Day 1

- Creating a new application (application.apa)
- Advanced functionalities, e. g. time attributes, conditions, and hierarchies
- Use of central layout concepts and visual formatting
- Conceptions, development, provision, maintenance, and documentation of comprehensive Enterprise applications
- Use of administration and calculation formulas, libraries, internal database, and central documents

Day 2

- Excursion: Documentation options in documents and formulas
- Use of central functions such as Printing, bookmarking, e-mailing, commenting, Excel export
- Best Practice
- Documentation options in documents and formulas
- Filter options
- Multiple graphical types
- Entering menu administered comments

Course Details

Duration

Two days (9am - 5pm)



Materials Provided

Student Guide

Pre-Requisites

- Completion of Introduction to Longview Analytics course or Introduction modules in the eLearning Library

Fees

Delivery Method	Cost (local currency)
 Group Live	2,350 per person or 9,400 for up to 10 people, plus expenses
 Group Internet Based – Instructor Led	2,350 per person or 9,400 for up to 6 people

CPE Credits: 14.5

Hands-on: 60%

Longview Analytics Report Design II

Course Code: LVANALYTICSRD2

Program Level: Intermediate

Field of Study: Specialized knowledge

Who should take this course?

This course is designed for user who wish to design reports, such as Power Users, project managers, application designers and technical users.

Learning Objectives

- Designing customized reports meeting individual company requirements
- Specific exercises based on OLAP and ODBC databases

Agenda

Day 1

- Creating a new application (application.apa)
- Advanced functionalities, e.g. time attributes, conditions, and hierarchies
- Use of central layout concepts and visual formatting
- Conceptions, development, provision, maintenance, and documentation of comprehensive Enterprise applications
- Use of administration and calculation formulas, libraries, the internal database, and central documents
- Use of central functions such as Printing, bookmarking, e-mailing, commenting, and Excel export
- Best Practices
- Documentation options in documents and formulas
- Filter options
- Multiple graphical types

Day 2

- Checkboxes with advanced graphic functionalities to select data sets
- Drill-down documents
- Dynamic color setting in graphics and other Enterprise objects
- Entering menu administered comments
- Combining portfolio charts
- KPI variables in portfolio charts
- Drill-down in charts
- Data validation after entering data
- Combining multiple data sources
- Traffic light functions

Course Details

Duration

Two days (9am - 5pm)



Materials Provided

Student Guide

Pre-Requisites

- Completion of Introduction to Longview Analytics course or Introduction modules in the eLearning Library

Fees

Delivery Method	Cost (local currency)
 <p>Group Live</p>	2,350 per person or 9,400 for up to 10 people, plus expenses
 <p>Group Internet Based - Instructor Led</p>	2,350 per person or 9,400 for up to 6 people

CPE Credits: 14.5

Hands-on: 60%

Longview Analytics Information Design

Course Code: LVANALYTICSID

Program Level: Advanced

Field of Study: Specialized knowledge

Who should take this course?

This course is designed for users who wish to create informative applications for difference devices, such as Power Users, project managers, application designers, and technical users.

Learning Objectives

- How to create informative applications for different devices in a comprehensive, efficient, and target group driven manner
- An introduction in the HICHERT@SUCCESS design rules and HICHERT@IBCS Standards

Agenda

Day 1

- Creating a new application (application.apa)
- Advanced functionalities, e. g. time attributes, conditions, and hierarchies
- Usage of central layout conceptions and visual formattings
- Conceptions, development, provision, maintenance, and documentation of comprehensive Enterprise applications
- Use of administration and calculation formulas
- Use of libraries
- Use of the internal database
- Use of central documents
- Use of central functions such as printing, bookmarking, e-mailing, commenting, and Excel export

Day 2

- Best Practice
- Documentation options in documents and formulas
- Filter options
- Multiple graphical types
- Entering menu administered comments
- Advanced reporting
- Visualization of a project progress
- *Responsive Design* with the *DORA* conception (Design Once, Run Anywhere)
- HICHERT@SUCCESS design rules
- HICHERT@IBCS standards

Course Details

Duration

Two days (9am - 5pm)



Materials Provided

Student Guide

Pre-Requisites

- Completion of Introduction to Longview Analytics course or Introduction modules in the eLearning Library

Fees

Delivery Method	Cost (local currency)
 <p>Group Live</p>	3,000 per person or 12,000 for up to 10 people, plus expenses
 <p>Group Internet Based - Instructor Led</p>	3,000 per person or 12,000 for up to 6 people

CPE Credits: 14.5

Hands-on: 60%

Longview Analytics Application Design I

Course Code: LVANALYTICSAD1

Program Level: Intermediate

Field of Study: Specialized knowledge

Who should take this course?

This course is designed for individuals who work with and support the Longview Analytics application. This course is applicable for Power Users, Project managers, Application Designers, and Technical Users.

Learning Objectives

- The skills to work with predefined applications and functions
- How to support your applications to leverage information and work flows

Agenda

Day 1

- General Operator elements
- The application administration
- The Application Framework
- Planning Design
- Engage (Self-service Longview Analytics platform)
- Spotlight (Self-service)
- Excel Analytics

Course Details

Duration

One day (9am - 5pm)



Materials Provided

Student Guide

Pre-Requisites

- Completion of Introduction to Longview Analytics course or Introduction modules in the eLearning Library

Fees

Delivery Method	Cost (local currency)
 Group Live	1,175 per person or 4,700 for up to 10 people, plus expenses
 Group Internet Based - Instructor Led	1,175 per person or 4,700 for up to 6 people

CPE Credits: 7

Hands-on: 60%

Longview Analytics Certification

Course Code: LVANALYTICSCERT

Program Level: Advanced

Who should take this course?

Whether you are a partner or customer, after passing the exam, you can acquire the title “Certified Longview Analytics Consultant”. Through this certification, you can make sure that your developed solutions are always qualified, operated, and supervised.

The certification is valid until the next major release, at which point you will be required to pass another certification exam to maintain the title “Certified Longview Analytics Consultant”.

The passing grade is 60%.

Agenda

- In the certification exam, participants apply the acquired knowledge from the training in a practical exercise.

Course Details



Duration

Half day (4 to 5 hours)

Pre-Requisites

- Knowledge about the content from each course

Fees

Delivery Method	Cost (local currency)
 Group Live	1,175 per person or 4,700 for up to 10 people, plus expenses
 Group Internet Based – Instructor Led	1,175 per person or 4,700 for up to 6 people

Analytics for Longview Close

Course Code: LVANALYTICSCLOSE

Program Level: Intermediate

Field of Study: Specialized knowledge

Who should take this course?

This course is designed for Longview Close users who will be responsible to create, modify, and publish Analytics reports.

Learning Objectives

- Creating new reports and modifying existing reports
- Including calculations in reports
- Creating charts
- Publishing reports
- Performing user administration related to report navigation

Agenda

Day 1

- Administration – roles and navigation hierarchies
- Assign properties and functionality to a report
- Create reports
- Include objects in a report
- Create calculations in a report
- Connect multiple reports

Day 2

- Modify reports
- Create versions of a report
- Add items to an existing report
- Remove or modify items in an existing report
- Publish reports

Day 3 and 4 - Optional Workshop

- Attend this optional workshop to work with customer specific reports using your own data and hierarchies.

Course Details

Duration

Two days (9am - 5pm)



Materials Provided

Resource and Task Guide



Pre-Requisites

- Working knowledge of the Longview Close application

Fees

Delivery Method	Cost (local currency)
 Group Live	2,350 per person or 9,400 for up to 10 people, plus expenses
 Group Internet Based – Instructor Led	2,350 per person or 9,400 for up to 6 people

Optional workshop fee:

Delivery Method	Cost (local currency)
 Group Live	2,350 per person or 9,400 for up to 10 people, plus expenses
 Group Internet Based – Instructor Led	2,350 per person or 9,400 for up to 6 people

CPE Credits: 14.5

Hands-on: 60%

Analytics for Longview Tax

Course Code: LVANALYTICSTAX

Program Level: Intermediate

Field of Study: Specialized knowledge

Who should take this course?

This course is designed for Longview Tax users who will be responsible to create, modify, and publish Analytics reports.

Learning Objectives

- Creating new reports and modifying existing reports
- Including calculations in reports
- Creating charts
- Publishing reports
- Performing user administration related to report navigation

Agenda

Day 1

- Administration – roles and navigation hierarchies
- Assign properties and functionality to a report
- Create reports
- Include objects in a report
- Create calculations in a report
- Connect multiple reports

Day 2

- Modify reports
- Create versions of a report
- Add items to an existing report
- Remove or modify items in an existing report
- Publish reports

Day 3 and 4 - Optional Workshop

- Attend this optional workshop to work with customer specific reports using your own data and hierarchies.

Course Details

Duration

Two days (9am - 5pm)



Materials Provided

Resource and Task Guide



Pre-Requisites

- Working knowledge of the Longview Tax application

Fees

Delivery Method	Cost (local currency)
 Group Live	2,350 per person or 9,400 for up to 10 people, plus expenses
 Group Internet Based – Instructor Led	2,350 per person or 9,400 for up to 6 people

Optional workshop fee:

Delivery Method	Cost (local currency)
 Group Live	2,350 per person or 9,400 for up to 10 people, plus expenses
 Group Internet Based – Instructor Led	2,350 per person or 9,400 for up to 6 people

CPE Credits: 14.5

Hands-on: 60%

T100 Online – Tidemark Fundamentals

Course Code: LVT100

Program Level: Basic

Field of Study: Specialized knowledge

Who should take this course?

This course is designed for business users who will administer, build, and configure processes and associated content within the Tidemark application.

Learning Objectives

- Creating and managing performance management analytic applications using the Tidemark cloud-based technology platform
- Automating financial & operational planning, budgeting and forecasting processes

Student Requirements

- **Internet Access:** Each student will need a PC or Mac with internet access, and will need to use a web browser.
- **Browser:** Each student must have a web browser that will be used to access Tidemark training tenants.
Note: Google Chrome is the preferred web browser for Tidemark Academy training, but any supported browser will work.
- **VOIP with microphone or phone (online only):** Students should have access to VOIP on their computer with a microphone, in order to participate in discussions and ask questions during class. If VOIP and a microphone are not available, students will have the ability to call into the training conference using their phone and will be able to listen and ask questions through the conference call.

Agenda

Day 1

- Tidemark Overview
- Building a Tidemark Process
- Adding Steps to a Process

Day 2

- Creating Storylines
- Using Initiatives
- Administering a Process

Day 3

- Using a Process
- Working with Business Methods
- Analytics and Playbooks

Course Details

Duration

Three days (9am - 5pm)



Materials Provided

Resource and Task Guide

Pre-Requisites

- Working knowledge of performance management and financial processes & applications
- Familiarity with multidimensional data analysis and modeling terminology is recommended

Fees

Delivery Method	Cost (local currency)
 Group Live	3,500 per person or 14,000 for up to 10 people, plus expenses
 Group Internet Based – Instructor Led	3,500 per person or 14,000 for up to 6 people

CPE Credits: 22

Hands-on: 75%

ACT – Advanced Configuration Training

Course Code: LVACT

Program Level: Advanced

Field of Study: Specialized knowledge

Who should take this course?

This course is designed for business users who will administer, build, and configure processes and associated content within the Tidemark application.

Learning Objectives

- Advanced configuration techniques to promote customer self-reliance of their Tidemark solutions
- Optimizing the create and management of Tidemark performance management analytical applications
- Building Tidemark solutions for various business scenarios
- Real-world situation and solutions
- Best practices
- Transforming FP&A through Tidemark’s best-in-class performance management platform

Student Requirements

- **Internet Access:** Each student will need a PC or Mac with internet access, and will need to use a web browser.
- **Browser:** Each student must have a web browser that will be used to access Tidemark training tenants.
Note: Google Chrome is the preferred web browser for Tidemark Academy training, but any supported browser will work
- **VOIP with microphone or phone (online only):** Students should have access to VOIP on their computer with a microphone, in order to participate in discussions and ask questions during class. If VOIP and a microphone are not available, students will have the ability to call into the training conference using their phone and will be able to listen and ask questions through the conference call.

Agenda

Day 1

- Setting up Dimensions and Hierarchies
- Configuring and Loading Metrics
- Advanced Storylines

Course Details

Duration

Three days (9am - 5pm)



Materials Provided

Resource and Task Guide

Pre-Requisites

- Successful completion of the T100 Tidemark Fundamentals training class
- Ability to create Tidemark processes and panels including understanding of cycle dimensions and building of grids

Fees

Delivery Method	Cost (local currency)
 Group Live	4,000 per person or 16,000 for up to 8 people, plus expenses
 Group Internet Based – Instructor Led	4,000 per person or 16,000 for up to 6 people

CPE Credits: 22

Hands-on: 90%

Day 2

- Working with Memberset Definitions
- Creating Calculations Using Metric Math
- Tidemark Business Methods (TBMs)

Day 3

- Configuring Initiatives
- Multi Step Approval Process
- Security

SnapLogic4 Fundamentals Course

Course Code: LVSNAPLOGIC4

Program Level: Advanced

Field of Study: Specialized knowledge

Who should take this course?

The target audience for this course is a technical user who has some past project experience using an ETL tool. SQLite script a plus or general scripting knowledge for data transformations in line with data integrations. Tidemark Experience a plus but not required.

Learning Objectives

- How Tidemark uses SnapLogic4 to assist in ETL Requirements for Tidemark Projects
- The designer, manager and dashboard
- The common snaps, common components, Tidemark examples, and transformation techniques via scripting.

Student Requirements

- **Internet Access:** High Speed Wireless (WI-FI) or Wired Internet access with guest user account(s) for instructor(s) to be able to access Internet directly (bypass any Intranet imposed restrictions)
- **Seating:** Classroom or Conference room setup
- **AV Equipment:** LCD Projector & Projection Screen, or TV connection for a small group
- A laptop PC or Mac with WI-FI/wireless connectivity is required to complete the workshops designed for the training
- Google Chrome Web browser needs to be installed on your laptop PC/Mac

Agenda

Day 1

- Overview
- Introduction to Pipelines
- Building Pipelines

Day 2

- Managing and Troubleshooting
- Tidemark Use Cases - Includes use cases the customers propose within the class
- Best Practices

Course Details

Duration

- Group Live: Three days (9am - 5pm)
- Group Internet Based – Instructor Led: Four days (4-5 hours each day)



Materials Provided

Resource and Task Guide

Pre-Requisites

- Successful completion of the T100 Tidemark Fundamentals training class
- Ability to create Tidemark processes and panels including understanding of cycle dimensions and building of grids

Fees

Delivery Method	Cost (local currency)
 Group Live	4,000 per person or 16,000 for up to 8 people, plus expenses
 Group Internet Based – Instructor Led	4,000 per person or 16,000 for up to 6 people

CPE Credits: 22

Hands-on: 90%