About insightsoftware

insightsoftware is a leading provider of financial reporting and enterprise performance management software. We enable the Office of the CFO to connect to and make sense of their enterprise data in real time so they can proactively drive greater financial intelligence across their organization, which is how best-in-class finance teams operate. Over 25,000 organizations worldwide rely on insightsoftware’s portfolio of best-in-class reporting, analytics, budgeting, forecasting, consolidation, and tax solutions to provide them with increased productivity, visibility, accuracy, and compliance.

Visit insightsoftware.com for more information.

The contents of this document and the associated software are the property of Longview and are copyrighted. No part of this document may be reproduced in whole or in part or by any means, for any purpose without the express written permission of Longview.

Longview makes no representations or warranties as to the software, expressed or implied, including, without limitation, the implied warranties and conditions of title, non-infringement, merchantability and fitness for any particular purpose and those arising by statute or otherwise in law or from a course of dealing or usage of trade. Further, Longview reserves the right to revise this publication and to make changes from time to time in the content thereof without obligation to notify any person or organization of such revision or change. In no event shall Longview, its directors, officers, employees or agents be liable for any special, direct, indirect or consequential damages (including damages for loss of business profits, business interruption, loss of business information or reduction of expenses, actual or anticipated, and the like) arising out of the use or inability to use the software whether based on contract, tort or any other legal theory.

Longview is a registered trademark of Longview Software Limited and Longview US Holdings Inc. All other company and product names are trademarks or registered trademarks of their respective companies.

©Copyright 2022
Longview
All rights reserved.
Published and printed in Canada.
# TABLE OF CONTENTS

**Introduction** ................................................................................................................. 5
Accreditation ......................................................................................................................... 5
Refund/Cancellation Policy ................................................................................................. 5
Complaint Resolution Policy ............................................................................................... 5
Delivery Methods .................................................................................................................. 6
Courses by Training Path ..................................................................................................... 6

**TAX COURSES**

Longview Tax Analyst ......................................................................................................... 7
Longview Tax Administrator ................................................................................................. 8
Creating Input Apps Using Longview Designer .................................................................... 9
Creating Data Table Apps Using Longview Designer .......................................................... 10
Creating Designer Input Apps for the Advanced User ......................................................... 11
Advanced Configuration ...................................................................................................... 12
Longview Add-In for Office ................................................................................................. 13
Building Reports with Analysis & Reporting ........................................................................ 14
Longview Tax Data Import and Export ............................................................................... 15
Longview Tax Implementer I ............................................................................................... 16

**CLOSE COURSES**

Longview Close Fundamentals ......................................................................................... 17
Data Load and Balancing ................................................................................................. 19
Building Reports with Analysis & Reporting ...................................................................... 20
Administering Longview Close ......................................................................................... 21
Longview Analyst ............................................................................................................... 22
Longview Application Administrator .................................................................................. 23
Creating Input Apps Using Longview Designer ................................................................. 25
Creating Data Table Apps Using Longview Designer ....................................................... 26
Creating Designer Input Apps for the Advanced User ...................................................... 27
Advanced Configuration .................................................................................................... 28
Longview Add-In for Office ............................................................................................... 29
Longview Application Framework with Smart Client ......................................................... 30
LVIS for Longview: Administration .................................................................................. 31
PLAN COURSES

Data Load and Balancing.................................................................................................................................................. 32
Building Reports with Analysis & Reporting.......................................................................................................................... 33
Longview Analyst ........................................................................................................................................................................ 34
Longview Application Administrator ........................................................................................................................................ 35
Creating Input Apps Using Longview Designer .......................................................................................................................... 37
Creating Data Table Apps Using Longview Designer .................................................................................................................. 38
Creating Designer Input Apps for the Advanced User .................................................................................................................. 39
Advanced Configuration ................................................................................................................................................................. 40
Longview Add-In for Office ............................................................................................................................................................. 41
Longview Application Framework with Smart Client .................................................................................................................... 42
LVIS for Longview: Administration .............................................................................................................................................. 43

ANALYTICS COURSES

Longview Analytics Fundamentals .................................................................................................................................................. 44
Longview Analytics Introduction ....................................................................................................................................................... 45
Longview Analytics Report Design I .................................................................................................................................................. 46
Longview Analytics Report Design II .............................................................................................................................................. 47
Longview Analytics Information Design ....................................................................................................................................... 48
Longview Analytics Application Design I ......................................................................................................................................... 49
Longview Analytics Certification ...................................................................................................................................................... 50
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: https://insightsoftware.com/support/education-services/

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: https://insightsoftware.com/support/education-services/

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:

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.

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: https://insightsoftware.com/support/education-services/
DELIVERY METHODS
There are multiple methods of delivery for many of the courses:

Group Live Workshop

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

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

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 TRAINING PATH
Courses are listed by the four (4) Longview training paths: Longview Close, Longview Tax, Longview Analytics, and Longview Plan (Tidemark).

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

Course Code: LVTAXANALYST
Program Level: Basic
Field of Study: Specialized knowledge

Who should take this course?
This course is designed for users 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 Monitoring
• Tax Provision Process – Federal
  o Reviewing Chart of Accounts data and Tax Rates
  o Entering Current Provision data
  o Entering Return to Provision data
  o Entering Deferred Rollforward data
  o Entering Tax Account Rollforward data
  o Reviewing Provision Reports (Current, Deferred, ETR)
• Overview of the Tax Provision Process - State
  o Entering Provision data
  o Reviewing State reports
• Using Scenarios (What If)
• Working with Reports
• Introduction to Longview Add-In for Office

Course Details
Duration
One day (9am - 5pm)

Materials Provided
Resource and Task Guide

Pre-Requisites
• None

Fees

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Cost (local currency)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Live</td>
<td>900 per person or 3,600 for up to 10 people, plus expenses</td>
</tr>
<tr>
<td>Group Internet Based - Instructor Led</td>
<td>900 per person or 3,600 for up to 6 people</td>
</tr>
</tbody>
</table>

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
- Process Maps
- Entity Maintenance
- Currency Maintenance
- Updating the Chart of Accounts
- Tax Provision Accounts Maintenance
- Regional Provision Considerations
- Automation Groups
- Tax Account Rollforward Maintenance
- Tax Rates and Trial Balance Data

Day 2
- Monitoring Submissions and Tax Calculations
- User and Group Maintenance
- Rollover and Scenario Setup
- Recalculating the System
- Interim Maintenance
- Monitoring Longview Tax Server
- Backing up Longview Tax
- Managing Log Files
- Report Modification and Publishing (A&R)

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

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Cost (local currency)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Live</td>
<td>1,600 per person or 6,400 for up to 10 people, plus expenses</td>
</tr>
<tr>
<td>Group Internet Based - Instructor Led</td>
<td>1,600 per person or 6,400 for up to 6 people</td>
</tr>
</tbody>
</table>

CPE Credits: 14.5
Hands-on: 60%
CREATING INPUT APPS USING LONGVIEW DESIGNER

Course Code: LVINPAPPSS
Program Level: Intermediate
Field of Study: Specialized knowledge

Who should take this course?
This course is designed for 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 - Half Day
- Adding User Selections
- Adding Dynamic Symbol Selections Using Variables
- Adding a Simple Model
- Adding a Transfer Model

Course Details

Duration
1.5 days (Day 1: 9am - 5pm, Day 2: 9am - 1pm)

Materials Provided
Task Guide

Pre-Requisites
- Successful completion of the Tax Analyst course

Fees

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Cost (local currency)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Live</td>
<td>1,800 per person or 7,200 for up to 10 people, plus expenses</td>
</tr>
<tr>
<td>Group Internet Based - Instructor Led</td>
<td>1,800 per person or 7,200 for up to 6 people</td>
</tr>
</tbody>
</table>

CPE Credits: 11
Hands-on: 60%
CREATING DATA TABLE APPS USING LONGVIEW DESIGNER

Course Code: LVDTAPPS
Program Level: Intermediate
Field of Study: Specialized knowledge

Who should take this course?
This course is designed for Application Framework experienced users who wish to gain exposure to developing Longview Data Table Apps using Longview Designer. 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
• Understanding the calculation capability of a Data Table Input App

Agenda

Day 1 - Half Day
• Setting up app tables within SQL Server
• Creating a Data Table Input App
• Adding Formatting to your App
• Importing Data into your App
• Demo of a Simple Calculation
• Other Formatting

Course Details
Duration
Half day (4 hours)

Materials Provided
Task Guide

Pre-Requisites
• Successful completion of the Tax Analyst course, and Creating Input Apps Using Longview Designer courses

Fees

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Cost (local currency)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Live</td>
<td>700 per person or 2,800 for up to 10 people, plus expenses</td>
</tr>
<tr>
<td>Group Internet Based - Instructor Led</td>
<td>700 per person or 2,800 for up to 6 people</td>
</tr>
</tbody>
</table>

CPE Credits: 4
Hands-on: 60%
CREATING DESIGNER INPUT APPS FOR THE ADVANCED USER

Course Code: LVINPADV
Program Level: Advanced
Field of Study: Specialized knowledge

Who should take this course?
This course is designed for Application Framework experienced users 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
- Enhancing Data View Input Apps with Validations

Course Details

Duration
One day (9am - 5pm)

Materials Provided
Resource and Task Guide

Pre-Requisites
- Prior training and experience with Longview Application Framework

Fees

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Cost (local currency)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Live</td>
<td>1,175 per person or 4,700 for up to 10 people, plus expenses</td>
</tr>
<tr>
<td>Group Internet Based - Instructor Led</td>
<td>1,175 per person or 4,700 for up to 6 people</td>
</tr>
</tbody>
</table>

CPE Credits: 7
Hands-on: 60%
ADVANCED CONFIGURATION

Course Code: LVADVCONFIG
Program Level: Advanced
Field of Study: Specialized knowledge

Who should take this course?
This course is designed for users who are responsible for the development of advanced Longview applications and processes. This course teaches Longview’s Application Framework language, as well as various other templates using Longview Designer technology.

Learning Objectives
Application Framework
- Application Framework syntax through various hands-on programming exercises
- Coding customized procedure documents, given a set of logic requirements
- Commands and functions (such as looping, conditions), best practices and debugging

Designer
- Building and using a Free Form App
- Enhancing Data View Input Apps with Longview Forms
- Creating forms to accept user input that interact with the app
- Creating a simple Free Form App that will retrieve a basic data audit trail
- Creating and defining Data Events
- Setting up and running manual triggers for Data Events
- Building and using a shared code library

Agenda

Day 1
- Configuration and Formatting Standards
- Procedure Commands and Functions
- Enhancing Data View Input Apps with Longview Forms

Day 2
- Creating a simple Free Form App that will retrieve a basic data audit trail
- Enhancing Data View Input Apps with Validations
- Data Events and Triggers
- Additional Configuration Library

Course Details
Duration
Two days (9am - 5pm)

Materials Provided
Task Guide

Pre-Requisites
- Successful completion of the Creating Input Apps Using Longview Designer 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 users 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
- Data Queries
- Longview Cell Styles
- Symbol Queries
- Attribute Queries
- Longview Add-In for Office Functions
- Building a custom workbook with Longview data
- Cell-Triggered Symbol Selectors
- Submitting Data
- Excel Combo Boxes
- Longview Add-In for Office Projects

Course Details

Duration
One day (9am - 5pm)

Materials Provided
Resource and Task Guide

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

Fees

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Cost (local currency)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Live</td>
<td>1,175 per person or 4,700 for up to 10 people, plus expenses</td>
</tr>
<tr>
<td>Group Internet Based – Instructor Led</td>
<td>1,175 per person or 4,700 for up to 6 people</td>
</tr>
</tbody>
</table>

CPE Credits: 7
Hands-on: 60%
BUILDING REPORTS WITH ANALYSIS & REPORTING

Course Code: LVARREPORTS
Program Level: Basic
Field of Study: Specialized knowledge

Who should take this course?
This course is designed for users who will be responsible for building reports during the implementation project or on an on-going basis.

Learning Objectives
• How to create and run a Longview Analysis and Reporting query
• How to manipulate a Longview Analysis and Reporting query
• How to insert, edit, and delete calculated rows and columns
• How to save and open Longview Analysis and Reporting reports
• How to print Longview Analysis and Reporting reports
• How to run a Longview Analysis and Reporting report as a user
• How to modify a Longview Analysis and Reporting report
• How to create and run a Longview Analysis and Reporting report batch
• How to create and publish report templates

Agenda

Half Day
• Creating Data Queries in A&R
• Formatting data queries
• Creating Calculated symbols
• Creating A&R reports
• Formatting A&R reports
• Using report batches
• Creating and publishing report templates

Course Details
Duration
Half day (4 hours)

Materials Provided
Resource and Task Guide

Pre-Requisites
• None

Fees

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Cost (local currency)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Live</td>
<td>700 per person or 2,800 for up to 10 people, plus expenses</td>
</tr>
<tr>
<td>Group Internet Based – Instructor Led</td>
<td>700 per person or 2,800 for up to 6 people</td>
</tr>
</tbody>
</table>

CPE Credits: 4 credits
Hands-on: 60%
LONGVIEW TAX DATA IMPORT AND EXPORT

Course Code: LV TAXIMPORTEXPORT
Program Level: Intermediate
Field of Study: Specialized knowledge

Who should take this course?
This course is designed for users who will be responsible for importing data into Longview Tax and exporting data from Longview Tax.

Learning Objectives
- Create data imports to allow for the importing of flat files
- Create data exports to allow for the exporting of flat files

Agenda

Half Day
- Using the Mappings editor to create Maps and Mappings
- Creating a Data Import app
- Importing data
- Publishing and unpublishing apps
- Creating a Data Area Export
- Exporting data

Course Details

Duration
Half day (4 hours)

Materials Provided
Resource and Task Guide

Pre-Requisites
- Successful completion of the Tax Administrator course

Fees
<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Cost (local currency)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Live</td>
<td>700 per person or 2,800 for up to 10 people, plus expenses</td>
</tr>
<tr>
<td>Group Internet Based – Instructor Led</td>
<td>700 per person or 2,800 for up to 6 people</td>
</tr>
</tbody>
</table>

CPE Credits: 4 credits
Hands-on: 60%
LONGVIEW TAX IMPLEMENTER I

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
• Gain a better understanding of Longview Tax
• Taking a post-launch database and building an application
• Setting up a Customer’s Tax provision

Agenda

Day 1
• Longview Tax Overview
• Key Concepts
• Annual Provision Process
• Data Flow and Calculation Summary
• Longview Tax Events and Triggers
• Loader Files and Editors
• Items to Consider
• System Setup Group Exercise

Day 2
• System Setup Group Exercise continued

Day 3
• Process Maps
• Standard Configuration Tasks
• Application Administrator
• Event Messaging and Diagnosing Issues
• Upgrade Process
• User and User Groups

Course Details
Duration
Three days (9am - 5pm)

Materials Provided
Resource and Task Guide

Pre-Requisites
• Successful completion of the Tax Analyst, Tax Administrator, Add-In for Office, Building Reports with A&R in Longview Tax, and Longview Tax Data Import and Export courses

Fees
<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Cost (local currency)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Live</td>
<td>2,500 per person or 10,000 for up to 10 people, plus expenses</td>
</tr>
<tr>
<td>Group Internet Based – Instructor Led</td>
<td>2,500 per person or 10,000 for up to 6 people</td>
</tr>
</tbody>
</table>

CPE Credits: 22
Hands-on: 75%

©Longview. All rights reserved. Proprietary and Strictly Confidential.
LONGVIEW CLOSE FUNDAMENTALS

Course Code: LVCLOSEFUND
Program Level: Basic
Field of Study: Specialized knowledge

Who should take this course?
This course is designed for users who will be participating in the implementation project and performing/maintaining the Close process using the Longview solution. Users will learn about using and managing the components of the Longview Close application.

Learning Objectives
- The features and capabilities of the software, and the procedures required to perform standard tasks
- Using process maps to navigate applications via their defined business processes
- The impacts to reports and input apps from the rollover process
- Adding and updating currencies and entities
- Running the trial balance import process and validating the data
- Using Attribute-Based reports
- Importing intercompany data
- Intercompany Analysis app is used to analyze intercompany detail that has been input into the Longview system
- Configuring Foreign Exchange and maintaining translation settings
- Managing Cash Flow accounts
- Managing Roll Forward accounts
- Creating symbols
- Working with out of box reports
- Posting journal entries and running journal entry reports
- Using the workflow process for approval processes
- Maintaining intercompany elimination settings
- Using the Show Audit Trail app to analyze an intersection in a report or app in order to view the underlying data changes

Agenda

Day 1
- Introduction to Longview
- Using Longview Close
- Process Maps
- Rollover Process
- Managing Currencies, Entities, and Translations
- Import trial balance data
- Validation Reports
- Attribute-Based Reports
- Import intercompany data
- Intercompany Analysis app
- Dynamic Calculations
- Foreign Exchange

Course Details

Duration
1.5 days

Materials Provided
Resource and Task Guide

Pre-Requisites
- Familiarity with Finance Principles

Fees

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Cost (local currency)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Live</td>
<td>1,800 per person or 7,200 for up to 10 people, plus expenses</td>
</tr>
<tr>
<td>Group Internet Based – Instructor Led</td>
<td>1,800 per person or 7,200 for up to 6 people</td>
</tr>
</tbody>
</table>

CPE Credits: 11
Hands-on: 60%
Day 2

- Cash Flow Processing
- Roll Forward Processing
- Creating symbols
- Reports
- Journal Entries
- Approval Workflow
- Intercompany Eliminations
- Data Audit Trail
DATA LOAD AND BALANCING

Course Code: LVDLANDB
Program Level: Basic
Field of Study: Specialized knowledge

Who should take this course?
This course is designed for Longview users who will be participating in the implementation project specifically responsible for managing the historical data.

Learning Objectives
- Creating data import apps to import data into Longview
- Creating ad hoc queries using Longview Analysis and Reporting
- Using Longview Validations
- Using Longview Add-In for Office to create data queries and export data
- Using Longview Add-In for Office to submit data from worksheet cells to the Longview data server repository

Agenda

Day 1
- Data Import Apps
- Mappings
- Introduction to building queries with Longview Analysis and Reporting
- Longview Add-In for Office
- Data Submission

Course Details

Duration
One day (9am - 5pm)

Materials Provided
Resource and Task Guide

Pre-Requisites
- Successful completion of the Longview Close Fundamentals course

Fees

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Cost (local currency)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Live</td>
<td>1,175 per person or 4,700 for up to 10 people, plus expenses</td>
</tr>
<tr>
<td>Group Internet Based – Instructor Led</td>
<td>1,175 per person or 4,700 for up to 6 people</td>
</tr>
</tbody>
</table>

CPE Credits: 7
Hands-on: 60%
BUILDING REPORTS WITH ANALYSIS & REPORTING

Course Code: LVARREPORTS  
Program Level: Basic  
Field of Study: Specialized knowledge

Who should take this course?  
This course is designed for users who will be responsible for building reports during the implementation project or on an on-going basis.

Learning Objectives
• How to create and run a Longview Analysis and Reporting query  
• How to manipulate a Longview Analysis and Reporting query  
• How to insert, edit, and delete calculated rows and columns  
• How to save and open Longview Analysis and Reporting reports  
• How to print Longview Analysis and Reporting reports  
• How to run a Longview Analysis and Reporting report as a user  
• How to modify a Longview Analysis and Reporting report  
• How to create and run a Longview Analysis and Reporting report batch  
• How to create and publish report templates

Agenda

Half Day
• Creating Data Queries in A&R  
• Formatting data queries  
• Creating Calculated symbols  
• Creating A&R reports  
• Formatting A&R reports  
• Using report batches  
• Creating and publishing report templates

Course Details

Duration  
Half day (4 hours)

Materials Provided  
Resource and Task Guide

Pre-Requisites
• None

Fees

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Cost (local currency)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Live</td>
<td>700 per person or 2,800 for up to 10 people, plus expenses</td>
</tr>
<tr>
<td>Group Internet Based – Instructor Led</td>
<td>700 per person or 2,800 for up to 6 people</td>
</tr>
</tbody>
</table>

CPE Credits: 4 credits  
Hands-on: 60%
ADMINISTERING LONGVIEW CLOSE

Course Code: LVADMINISTERINGCLOSE
Program Level: Intermediate
Field of Study: Specialized knowledge

Who should take this course?
This course is designed for Longview users who will be participating in the implementation project or administering the system on an ongoing basis.

Learning Objectives
- How to maintain users and groups
- How to create process maps to allow users to navigate applications via their defined business processes
- How to set up and run a simple input app
- Building Attribute-Based Reports
- How to add both simple and advanced formatting to an input app
- How to view and delete locks
- How to view user submissions
- Building Approval Workflow processes by defining data areas, and assigning owners and approvers

Agenda

Half Day
- User and Group Maintenance
- Creating and Editing Process Maps
- Creating a Simple Data View Input App
- Adding Simple Formatting to your Input App
- Attribute-based reports
- Data locks and user submissions
- Approval Workflow

Pre-Requisites
- Successful completion of the Longview Close Fundamentals course

Course Details

Duration
Half day (4 hours)

Materials Provided
Resource and Task Guide

Fees
Delivery Method | Cost (local currency)
--- | ---
Group Live | 700 per person or 2,800 for up to 10 people, plus expenses
Group Internet Based – Instructor Led | 700 per person or 2,800 for up to 6 people

CPE Credits: 4 credits
Hands-on: 60%
LONGVIEW ANALYST

Course Code: LVCPMANALYST
Program Level: Basic
Field of Study: Specialized knowledge

Who should take this course?
This course is designed for those 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
• Introduction to Longview
• Using Longview Close
• Running Reports
• Using Attribute-based reports
• Running Data Import Apps
• Using Input Apps
• Using Data Tables

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 users 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 maintaining user and system security settings
- Creating attributes
- Configuring journal entries
- Maintaining intercompany elimination settings
- Configuring Foreign Exchange and maintaining translation settings
- Creating and publishing process maps
- Creating data imports to allow for the importing of flat files
- Creating single value data area export apps
- Creating input apps to allow for manual entry of data
- Building and publishing report templates
- Creating Attribute-based reports
- Using Longview server rules
- 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
- Attribute Maintenance
- Intercompany Eliminations
- Journal Entries Configuration
- Foreign Exchange Maintenance
- Process Maps
Day 2

- Apps Publisher
- Data Imports
- Data Exports
- Data View Input Apps
- Creating and Publishing Reports in Analysis & Reporting
- Attribute-based reporting apps
- Server Rules
- Server Manager
- Approval Workflow
CREATING INPUT APPS USING LONGVIEW DESIGNER

Course Code: LVINPAPPS
Program Level: Intermediate
Field of Study: Specialized knowledge

Who should take this course?
This course is designed for 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 - Half Day
- Adding User Selections
- Adding Dynamic Symbol Selections Using Variables
- Adding a Simple Model
- Adding a Transfer Model

Course Details

Duration
1.5 days (Day 1: 9am - 5pm, Day 2: 9am - 1pm)

Materials Provided
Task Guide

Pre-Requisites
- Successful completion of the Longview Close
- Fundamentals or Longview Analyst course

Fees
Delivery Method | Cost (local currency)
--- | ---
Group Live | 1,800 per person or 7,200 for up to 10 people, plus expenses
Group Internet Based - Instructor Led | 1,800 per person or 7,200 for up to 6 people

CPE Credits: 11
Hands-on: 60%
CREATING DATA TABLE APPS USING LONGVIEW DESIGNER

Course Code: LVDTAPPS
Program Level: Intermediate
Field of Study: Specialized knowledge

Who should take this course?
This course is designed for Application Framework experienced users who wish to gain exposure to developing Longview Data Table Apps using Longview Designer. 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
- Understanding the calculation capability of a Data Table Input App

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
- Demo of a Simple Calculation
- Other Formatting

Course Details

Duration
Half day (4 hours)

Materials Provided
Task Guide

Pre-Requisites
- Successful completion of the Longview Close Fundamentals or Longview Analyst course, and the Creating Input Apps Using Longview Designer course

Fees

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Cost (local currency)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Live</td>
<td>700 per person or 2,800 for up to 10 people, plus expenses</td>
</tr>
<tr>
<td>Group Internet Based – Instructor Led</td>
<td>700 per person or 2,800 for up to 6 people</td>
</tr>
</tbody>
</table>

CPE Credits: 4
Hands-on: 60%

©Longview. All rights reserved. Proprietary and Strictly Confidential.
CREATING DESIGNER INPUT APPS FOR THE ADVANCED USER

Course Code: LVINPADV
Program Level: Advanced
Field of Study: Specialized knowledge

Who should take this course?
This course is designed for Application Framework experienced users 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
- Enhancing Data View Input Apps with Validations

Course Details

Duration
One day (9am - 5pm)

Materials Provided
Task Guide

Pre-Requisites
- Prior training and experience with Longview Application Framework

Fees

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Cost (local currency)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Live</td>
<td>1,175 per person or 4,700 for up to 10 people, plus expenses</td>
</tr>
<tr>
<td>Group Internet Based – Instructor Led</td>
<td>1,175 per person or 4,700 for up to 6 people</td>
</tr>
</tbody>
</table>

CPE Credits: 7
Hands-on: 60%
ADVANCED CONFIGURATION
Course Code: LVADVCONFIG
Program Level: Advanced
Field of Study: Specialized knowledge

Who should take this course?
This course is designed for users who are responsible for the development of advanced Longview applications and processes. This course teaches Longview’s Application Framework language, as well as various other templates using Longview Designer technology.

Learning Objectives
Application Framework
- Application Framework syntax through various hands-on programming exercises
- Coding customized procedure documents, given a set of logic requirements
- Commands and functions (such as looping, conditions), best practices and debugging

Designer
- Building and using a Free Form App
- Enhancing Data View Input Apps with Longview Forms
- Creating forms to accept user input that interact with the app
- Creating a simple Free Form App that will retrieve a basic data audit trail
- Creating and defining Data Events
- Setting up and running manual triggers for Data Events
- Building and using a shared code library

Agenda
Day 1
- Configuration and Formatting Standards
- Procedure Commands and Functions
- Enhancing Data View Input Apps with Longview Forms

Day 2
- Creating a simple Free Form App that will retrieve a basic data audit trail
- Enhancing Data View Input Apps with Validations
- Data Events and Triggers
- Additional Configuration Library

Course Details
Duration
Two days (9am - 5pm)

Materials Provided
Task Guide

Pre-Requisites
- Successful completion of the Creating Input Apps Using Longview Designer course

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

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 users 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
- Data Queries
- Longview Cell Styles
- Symbol Queries
- Attribute Queries
- Longview Add-In for Office Functions
- Building a custom workbook with Longview data
- Cell-Triggered Symbol Selectors
- Submitting Data
- Excel Combo Boxes
- Longview Add-In for Office Projects

Course Details

Duration
One day (9am - 5pm)

Materials Provided
Resource and Task Guide

Pre-Requisites
- Successful completion of the Longview Close Fundamentals or Longview Analyst course
- Basic knowledge of Microsoft Excel

Fees

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Cost (local currency)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Live</td>
<td>1,175 per person or 4,700 for up to 10 people, plus expenses</td>
</tr>
<tr>
<td>Group Internet Based – Instructor Led</td>
<td>1,175 per person or 4,700 for up to 6 people</td>
</tr>
</tbody>
</table>

CPE Credits: 7
Hands-on: 60%
LONGVIEW APPLICATION FRAMEWORK WITH SMART CLIENT

This course is no longer being offered for the current release of Longview. The following three courses have replaced this course, and can be taken all together, or separately:

- Creating Input Apps Using Longview Designer
- Creating Data Table Apps Using Longview Designer
- Advanced Configuration

For questions or training on prior releases, please contact https://insightsoftware.com/support/education-services/
LVIS FOR LONGVIEW: ADMINISTRATION

Course Code: LVLVIS
Program Level: Intermediate
Field of Study: Specialized knowledge

Who should take this course?
This course is designed for users who are administrators of LVIS, those who monitor or design LVIS integrations, as well as end-users.

Learning Objectives
- 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 the Longview Application Administrator course
- Coding experience is recommended but not required

Fees

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

CPE Credits: 14.5
Hands-on: 50%
DATA LOAD AND BALANCING

Course Code: LVDLANDB
Program Level: Basic
Field of Study: Specialized knowledge

Who should take this course?
This course is designed for Longview users who will be participating in the implementation project specifically responsible for managing the historical data.

Learning Objectives
• Creating data import apps to import data into Longview
• Creating ad hoc queries using Longview Analysis and Reporting
• Using Longview Validations
• Using Longview Add-In for Office to create data queries and export data
• Using Longview Add-In for Office to submit data from worksheet cells to the Longview data server repository

Agenda

Day 1
• Data Import Apps
• Mappings
• Introduction to building queries with Longview Analysis and Reporting
• Longview Add-In for Office
• Data Submission

Course Details

Duration
One day (9am - 5pm)

Materials Provided
Resource and Task Guide

Pre-Requisites
• Successful completion of the Longview Close Fundamentals course

Fees

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Cost (local currency)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Live</td>
<td>1,175 per person or 4,700 for up to 10 people, plus expenses</td>
</tr>
<tr>
<td>Group Internet Based – Instructor Led</td>
<td>1,175 per person or 4,700 for up to 6 people</td>
</tr>
</tbody>
</table>

CPE Credits: 7
Hands-on: 60%
BUILDING REPORTS WITH ANALYSIS & REPORTING

Course Code: LVARREPORTS
Program Level: Basic
Field of Study: Specialized knowledge

Who should take this course?
This course is designed for users who will be responsible for building reports during the implementation project or on an on-going basis.

Learning Objectives
- How to create and run a Longview Analysis and Reporting query
- How to manipulate a Longview Analysis and Reporting query
- How to insert, edit, and delete calculated rows and columns
- How to save and open Longview Analysis and Reporting reports
- How to print Longview Analysis and Reporting reports
- How to run a Longview Analysis and Reporting report as a user
- How to modify a Longview Analysis and Reporting report
- How to create and run a Longview Analysis and Reporting report batch
- How to create and publish report templates

Agenda

Half Day
- Creating Data Queries in A&R
- Formatting data queries
- Creating Calculated symbols
- Creating A&R reports
- Formatting A&R reports
- Using report batches
- Creating and publishing report templates

Course Details

Duration
Half day (4 hours)

Materials Provided
Resource and Task Guide

Pre-Requisites
- None

Fees

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Cost (local currency)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Live</td>
<td>700 per person or 2,800 for up to 10 people, plus expenses</td>
</tr>
<tr>
<td>Group Internet Based - Instructor Led</td>
<td>700 per person or 2,800 for up to 6 people</td>
</tr>
</tbody>
</table>

CPE Credits: 4 credits
Hands-on: 60%
LONGVIEW ANALYST

Course Code: LVCPMANALYST
Program Level: Basic
Field of Study: Specialized knowledge

Who should take this course?
This course is designed for those 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
- Introduction to Longview
- Using Longview Close
- Running Reports
- Using Attribute-based reports
- Running Data Import Apps
- Using Input Apps
- Using Data Tables

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

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

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 users 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 maintaining user and system security settings
- Creating attributes
- Configuring journal entries
- Maintaining intercompany elimination settings
- Configuring Foreign Exchange and maintaining translation settings
- Creating and publishing process maps
- Creating data imports to allow for the importing of flat files
- Creating single value data area export apps
- Creating input apps to allow for manual entry of data
- Building and publishing report templates
- Creating Attribute-based reports
- Using Longview server rules
- 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
- Attribute Maintenance
- Intercompany Eliminations
- Journal Entries Configuration
- Foreign Exchange Maintenance
- Process Maps
Day 2

- Apps Publisher
- Data Imports
- Data Exports
- Data View Input Apps
- Creating and Publishing Reports in Analysis & Reporting
- Attribute-based reporting apps
- Server Rules
- Server Manager
- Approval Workflow
CREATING INPUT APPS USING LONGVIEW DESIGNER

Course Code: LVINPAPPS
Program Level: Intermediate
Field of Study: Specialized knowledge

Who should take this course?
This course is designed for 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 – Half Day
• Adding User Selections
• Adding Dynamic Symbol Selections Using Variables
• Adding a Simple Model
• Adding a Transfer Model

Course Details
Duration
1.5 days (Day 1: 9am - 5pm, Day 2: 9am - 1pm)

Materials Provided
Task Guide

Pre-Requisites
• Successful completion of the Longview Close
• Fundamentals or Longview Analyst course

Fees
Delivery Method | Cost (local currency)
--- | ---
Group Live | 1,800 per person or 7,200 for up to 10 people, plus expenses
Group Internet Based – Instructor Led | 1,800 per person or 7,200 for up to 6 people

CPE Credits: 11
Hands-on: 60%
CREATING DATA TABLE APPS USING LONGVIEW DESIGNER

Course Code: LVDTAPPS
Program Level: Intermediate
Field of Study: Specialized knowledge

Who should take this course?
This course is designed for Application Framework experienced users who wish to gain exposure to developing Longview Data Table Apps using Longview Designer. 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
- Understanding the calculation capability of a Data Table Input App

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
- Demo of a Simple Calculation
- Other Formatting

Course Details

Duration
Half day (4 hours)

Materials Provided
Task Guide

Pre-Requisites
- Successful completion of the Longview Close Fundamentals or Longview Analyst course, and the Creating Input Apps Using Longview Designer course

Fees

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Cost (local currency)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Live</td>
<td>700 per person or 2,800 for up to 10 people, plus expenses</td>
</tr>
<tr>
<td>Group Internet Based – Instructor Led</td>
<td>700 per person or 2,800 for up to 6 people</td>
</tr>
</tbody>
</table>

CPE Credits: 4
Hands-on: 60%

Plan
CREATING DESIGNER INPUT APPS FOR THE ADVANCED USER

Course Code: LVINPADV
Program Level: Advanced
Field of Study: Specialized knowledge

Who should take this course?
This course is designed for Application Framework experienced users 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
- Enhancing Data View Input Apps with Validations

Course Details

<table>
<thead>
<tr>
<th>Duration</th>
<th>One day (9am - 5pm)</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Materials Provided</th>
<th>Task Guide</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Pre-Requisites</th>
<th>Prior training and experience with Longview Application Framework</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Fees</th>
<th>Cost (local currency)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery Method</td>
<td>Cost (local currency)</td>
</tr>
<tr>
<td>Group Live</td>
<td>1,175 per person or 4,700 for up to 10 people, plus expenses</td>
</tr>
<tr>
<td>Group Internet Based - Instructor Led</td>
<td>1,175 per person or 4,700 for up to 6 people</td>
</tr>
</tbody>
</table>

CPE Credits: 7
Hands-on: 60%
ADVANCED CONFIGURATION

Course Code: LVADVCONFIG  
Program Level: Advanced  
Field of Study: Specialized knowledge

Who should take this course? 
This course is designed for users who are responsible for the development of advanced Longview applications and processes. This course teaches Longview’s Application Framework language, as well as various other templates using Longview Designer technology.

Learning Objectives

Application Framework
- Application Framework syntax through various hands-on programming exercises
- Coding customized procedure documents, given a set of logic requirements
- Commands and functions (such as looping, conditions), best practices and debugging

Designer
- Building and using a Free Form App
- Enhancing Data View Input Apps with Longview Forms
- Creating forms to accept user input that interact with the app
- Creating a simple Free Form App that will retrieve a basic data audit trail
- Creating and defining Data Events
- Setting up and running manual triggers for Data Events
- Building and using a shared code library

Agenda

Day 1
- Configuration and Formatting Standards
- Procedure Commands and Functions
- Enhancing Data View Input Apps with Longview Forms

Day 2
- Creating a simple Free Form App that will retrieve a basic data audit trail
- Enhancing Data View Input Apps with Validations
- Data Events and Triggers
- Additional Configuration Library

Course Details

Duration
Two days (9am - 5pm)

Materials Provided
Task Guide

Pre-Requisites
- Successful completion of the Creating Input Apps Using Longview Designer 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 users 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
- Data Queries
- Longview Cell Styles
- Symbol Queries
- Attribute Queries
- Longview Add-In for Office Functions
- Building a custom workbook with Longview data
- Cell-Triggered Symbol Selectors
- Submitting Data
- Excel Combo Boxes
- Longview Add-In for Office Projects

Course Details

Duration
One day (9am - 5pm)

Materials Provided
Resource and Task Guide

Pre-Requisites
- Successful completion of the Longview Close Fundamentals or Longview Analyst course
- Basic knowledge of Microsoft Excel

Fees

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Cost (local currency)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Live</td>
<td>1,175 per person or 4,700 for up to 10 people, plus expenses</td>
</tr>
<tr>
<td>Group Internet Based - Instructor Led</td>
<td>1,175 per person or 4,700 for up to 6 people</td>
</tr>
</tbody>
</table>

CPE Credits: 7
Hands-on: 60%
LONGVIEW APPLICATION FRAMEWORK WITH SMART CLIENT

This course is no longer being offered for the current release of Longview. The following three courses have replaced this course, and can be taken all together, or separately:

- Creating Input Apps Using Longview Designer
- Creating Data Table Apps Using Longview Designer
- Advanced Configuration

For questions or training on prior releases, please contact https://insightsoftware.com/support/education-services/
LVIS FOR LONGVIEW: ADMINISTRATION

Course Code: LVLVIS
Program Level: Intermediate
Field of Study: Specialized knowledge

Who should take this course?
This course is designed for users who are administrators of LVIS, those who monitor or design LVIS integrations, as well as end-users.

Learning Objectives
- 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

Course Details

Duration
Two days (9am - 5pm)

Materials Provided
Resource and Task Guide

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

Fees

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Cost (local currency)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Live</td>
<td>2,350 per person or 9,400 for up to 10 people, plus expenses</td>
</tr>
<tr>
<td>Group Internet Based – Instructor Led</td>
<td>2,350 per person or 9,400 for up to 6 people</td>
</tr>
</tbody>
</table>

CPE Credits: 14.5
Hands-on: 50%
**LONGVIEW ANALYTICS FUNDAMENTALS**

**Course Code:** LVANALYTICSFUND  
**Program Level:** Basic  
**Field of Study:** Specialized knowledge

**Who should take this course?**  
This course is designed for users who will be participating in the development of Analytics applications and reports. Users will learn the basics of using the Longview Analytics solution, and take part in building a fully functioning application.

**Learning Objectives**
- The fundamental features and capabilities of Longview Analytics
- Building applications and reports in the Longview Analytics Designer
- Connecting to various data sources and querying data in a report
- Manipulating data using formulas and functions
- Building graphical charts
- Publishing applications in the Longview Analytics Administration Console

**Agenda**

**Day 1**
- Introduction to Longview Analytics  
- User Interface  
- Creating a New Application  
- Creating a New Dashboard  
- Connecting to a Data Source  
- Querying Data  
- Adding Calculations and Control Functions  
- Creating Charts  
- Working with Quicksteps

**Day 2**
- Formatting  
- Sorting Tables  
- Working with Layers  
- Introduction to the Analytics Framework  
- Querying Longview Sources  
- Building Reports with Repeated Blocks  
- Enabling PDF, Excel, and PowerPoint Exports  
- Publishing Applications

**Course Details**

<table>
<thead>
<tr>
<th>Duration</th>
<th>Two days (9am - 5pm)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Materials Provided</td>
<td>Task Guide</td>
</tr>
<tr>
<td>Pre-Requisites</td>
<td>None</td>
</tr>
<tr>
<td>Fees</td>
<td></td>
</tr>
<tr>
<td>Delivery Method</td>
<td>Cost (local currency)</td>
</tr>
<tr>
<td>Group Live</td>
<td>2,350 per person or</td>
</tr>
<tr>
<td></td>
<td>9,400 for up to 10</td>
</tr>
<tr>
<td></td>
<td>people, plus expenses</td>
</tr>
<tr>
<td>Group Internet</td>
<td>2,350 per person or</td>
</tr>
<tr>
<td>Based - Instructor</td>
<td>9,400 for up to 6</td>
</tr>
<tr>
<td></td>
<td>people</td>
</tr>
</tbody>
</table>

**CPE Credits:** 14.5  
**Hands-on:** 60%
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)
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 Analytics eLearning Library

Fees

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Cost (local currency)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Live</td>
<td>2,350 per person or 9,400 for up to 10 people, plus expenses</td>
</tr>
<tr>
<td>Group Internet Based – Instructor Led</td>
<td>2,350 per person or 9,400 for up to 6 people</td>
</tr>
</tbody>
</table>

CPE Credits: 14.5
Hands-on: 60%

©Longview. All rights reserved. Proprietary and Strictly Confidential.
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 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, 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
LONGVIEW ANALYTICS INFORMATION DESIGN

Course Code: LVANALYTICSID
Program Level: Intermediate
Field of Study: Specialized knowledge

Who should take this course?
This course is designed for users who wish to create informative applications for different 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 Analytics eLearning Library

Fees

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Cost (local currency)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Live</td>
<td>2,350 per person or 9,400 for up to 10 people, plus expenses</td>
</tr>
<tr>
<td>Group Internet Based – Instructor Led</td>
<td>2,350 per person or 9,400 for up to 6 people</td>
</tr>
</tbody>
</table>

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 users 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 Analytics eLearning Library

Fees

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Cost (local currency)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Live</td>
<td>1,175 per person or 4,700 for up to 10 people, plus expenses</td>
</tr>
<tr>
<td>Group Internet Based – Instructor Led</td>
<td>1,175 per person or 4,700 for up to 6 people</td>
</tr>
</tbody>
</table>

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”.

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

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Cost (local currency)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Live</td>
<td>700 per person or 2,800 for up to 10 people, plus expenses</td>
</tr>
<tr>
<td>Group Internet Based – Instructor Led</td>
<td>700 per person or 2,800 for up to 6 people</td>
</tr>
</tbody>
</table>