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E-LEARNING CATALOG

Charles River Global Education Services

An online curriculum designed to meet your needs and enhance productivity by developing solid, useful skills

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OVERVIEW

Charles River Development's Educational Services group provides high quality training to help you work more effectively with the Charles River Investment Management Solution (Charles River IMS). We offer an online curriculum designed to meet your needs and enhance productivity by developing solid, useful skills.

All courses provide extensive hands-on experience, and most allow participants to obtain Level 1 Certification in the topic. Your training investment allows you to develop a highly skilled workforce, while reducing technical support calls, increasing efficiencies, and achieving high ROI from your Charles River IMS investment.

ONLINE COURSES AT A GLANCE

<u>Course</u>	<u>Cost</u>	<u>Length (Hrs)</u>	<u>Exercise Hrs</u>
Privileging and Workflow Design: System Administration Part 1			
• Introduction to User Privileges	\$895	8.5	3
• Configuring the User Environment	\$795	7	2
• Workflows and Applying User Privileges	\$695	6	3
Batch Processing, Workflow Rules, DB Administration: System Administration Part 2			
• Batch Processes	\$595	4	3
• System Configuration	\$495	4.5	2
• Database Administration and Certification	\$495	4	1
General Courses			
Intro to the Charles River IMS	\$795	5	2
Charles River Compliance - Fundamentals	\$795	5	2

CERTIFICATION

Level 1 Certification is available to clients in the following core components of Charles River:

- Privileging and Workflow Design (System Administration Part 1)
- Batch Processing, Workflow Rules, Db Administration (System Administration Part 2)

WHY CERTIFY?

For the employer –

- Improve employee productivity and increase your ability to leverage the application
- Improve your team's ability to deliver successfully and satisfy end-users
- Provide a reliable validation of employee knowledge and training

For the employee –

- Gain practical skills you can use on the job
- Demonstrate in-depth skills
- Tangible recognition of your knowledge
- Become a more valuable member of your team

GENERAL COURSES

INTRODUCTION TO THE CHARLES RIVER IMS

Topics:

- **Getting Started**
 - *Log on to the Charles River Investment Management Solution*
 - *Search for and Retrieve Data in Windows*
 - *Preferences*
 - *Queries*
 - *Navigation*
- **Charles River Manager – Using Manager Workbench**
 - *Launching Manager Workbench*
 - *Manager Workbench Workspace*
 - *Profiles Navigation*
 - *Creating a Simple Order*
 - *Navigating the Manager Workbench*
 - *Entering a Basic Transaction for Fixed Income*
- **Charles River Trader – the Blotter**
 - *The Trading Blotter and Creating Orders*
 - *Order Status Codes*
 - *Trade Execution*
 - *Configuring the Blotter*
- **Charles River Anywhere**
 - *Creating Simple Orders Using Charles River Anywhere*
- **Account Setup**
- **Security Setup**
 - *Investment Classes and Security Types*
 - *Adding Equity Securities*
 - *Adding Fixed Income Securities*
- **Charles River Compliance**
 - *Navigating the Compliance Test Setup Window*
 - *Compliance Test Types*
 - *Writing Compliance Tests*
 - *Running Compliance*
 - *Managing Alerts, Warnings and Data Exceptions*

**APPROX.
DURATION**

5 HOURS

**CERTIFICATE OF
COMPLETION**

WHO SHOULD ATTEND: Technical Support, Operations and Project Team members

PRICE: \$795

SUGGESTED PREREQUISITES: None

CHARLES RIVER COMPLIANCE – FUNDAMENTALS

Topics:

- **About Compliance**
 - *Important Compliance Concepts*
 - *Navigating the Compliance Test Setup Window*
 - *Test Types*
- **Writing Compliance Tests**
 - *Test Expression*
 - *Writing Basic Compliance Tests*
 - *Validating Test Results*
 - *Test Options*
 - *Bulk Modify*
 - *Tracking Test Changes*
- **Running Charles River Compliance**
 - *Compliance Modes*
 - *Compliance Processing Example*
 - *Portfolio Compliance*
 - *Pre-trade, In-trade and Post-execution Compliance*
- **Alerts, Warnings and Data Exceptions**
 - *Overview of Alerts, Warnings and Data Exceptions*
 - *Processing Alerts*
 - *Using the Workflow Monitor in the Alert/Warning Workflow*
 - *Closing Privileges*
- **The Compliance Workspace**

WHO SHOULD ATTEND: Technical Support, Operations and Project Team members

PRICE: \$795

SUGGESTED PREREQUISITES:

- *Introduction to the Charles River IMS or*
- *Client Boot Camp or*
- *30 days experience with Charles River IMS*

**APPROX.
DURATION**

5 HOURS

**CERTIFICATE OF
COMPLETION**

SYSTEM ADMINISTRATION

PRIVILEGING AND WORKFLOW DESIGN: SYSTEM ADMINISTRATION PART 1

INTRODUCTION TO USER PRIVILEGES

Topics:

- System architecture
- The 5 privilege models
- Creating users
- Privilege concepts
- User groups
- Required privileges for Charles River Anywhere
- System parameters
- Login options

WHO SHOULD ATTEND: System administrators, project managers, project team members, and technical support staff

PRICE: \$895

SUGGESTED PREREQUISITES:

- *Introduction to the Charles River IMS or*
- *Client Boot Camp or*
- *30 days experience with Charles River IMS*

**APPROX.
DURATION**

8.5 HOURS

**CERTIFICATE OF
COMPLETION**

CONFIGURING THE USER ENVIRONMENT

Topics:

- Using queries
- Writing queries
- Layout Designer
- Blotter setup

WHO SHOULD ATTEND: System administrators, project managers, project team members, and technical support staff

PRICE: \$795

REQUIRED PREREQUISITES:

- *Introduction to User Privileges*

**APPROX
DURATION**

7 HOURS

**CERTIFICATE OF
COMPLETION**

WORKFLOWS AND APPLYING USER PRIVILEGES

Topics:

- Workflow design with extensive exercises
- Certification review
- System Administration Part 1 Certification Examination (80% to pass)

WHO SHOULD ATTEND: System administrators, project managers, project team members, and technical support staff

PRICE: \$695

REQUIRED PREREQUISITES:

- *Introduction to User Privileges and*
- *Configuring the User Environment*

**APPROX
DURATION**

6 HOURS

**LEVEL 1
CERTIFICATION**

BATCH PROCESSING, WORKFLOW RULES, DB ADMINISTRATION: SYSTEM ADMINISTRATION PART 2

BATCH PROCESSES

Topics:

- Batch Imports
- Batch Exports

WHO SHOULD ATTEND: System administrators, project managers, project team members, and technical support staff

PRICE: \$595

SUGGESTED PREREQUISITES:

- *Introduction to the Charles River IMS or*
- *Client Boot Camp or*
- *30 days experience with Charles River IMS*

AND

- *Introduction to User Privileges and*
- *Configuring the User Environment and*
- *Workflow and Applying User Privileges*

**APPROX
DURATION**

4 HOURS

**CERTIFICATE
OF
COMPLETION**

SYSTEM CONFIGURATION

Topics:

- Workflow rules
- Navigations
- Report configuration
- Extending your database

WHO SHOULD ATTEND: System administrators, project managers, project team members, and technical support staff

PRICE: \$495

SUGGESTED PREREQUISITES:

- *Introduction to the Charles River IMS or*
- *Client Boot Camp or*
- *30 days experience with Charles River IMS*

AND

- *Introduction to User Privileges and*
- *Configuring the User Environment and*
- *Workflow and Applying User Privileges*

**APPROX
DURATION**

4.5 HOURS

**CERTIFICATE
OF
COMPLETION**

DATABASE ADMINISTRATION AND CERTIFICATION

Topics:

- Database Administration
- Certification review
- System Administration Part 2 Certification Examination (80% to pass)

WHO SHOULD ATTEND: System administrators, project managers, project team members, and technical support staff

PRICE: \$495

REQUIRED PREREQUISITES:

- *Batch Processes and*
- *System Configuration*

**APPROX
DURATION**

4 HOURS

**LEVEL 1
CERTIFICATION**

GENERAL INFORMATION

TO ENROLL

You can enroll in any e-learning course by sending an email message to training@crd.com or by contacting the Charles River educational coordinator at 781-425-6924. Students may enroll for one course at a time.

Students will receive a confirmation email message. Charles River does not accept credit cards at this time. Billing will occur through normal invoicing procedure.

NOTES

- Course enrollment expires after 30 days from start date or course completion whichever occurs first
- Start date is determined by when the student begins the course
- Charles River monitors course progress and provides warning email messages as the expiration date nears
- Charles River online courses are available only to employees of Charles River clients

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