

Software version: 5.3.SP18

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This document contains the CCH® Tagetik Academy courses catalogue, with detailed information about optimal learning paths, duration, audience, prerequisites and topics covered in each course.

Learning Paths

We designed recommended Learning Path to maximize your investment in the Academy, according to your Role. Each Learning Path shows the recommended classes and actions for an efficient on-boarding as a CCH® Tagetik Administrator, Power User or System Administrator. Customized courses for End-Users are available on-demand.

After the learning path, you will find detailed information for each Course.

Course Delivery

All Academy courses are run as 'Live' classroom training, either in person or remotely. Instructor's explanations are conducted on a training environment and supported by PowerPoint slides. In order to make the training more efficient and interactive as possible, every attendee is asked to perform a series of hands-on workshops on a standard remote application.

All training courses are based on CCH® Tagetik 5.3 and include the following training material:

- Workshop guide with tips&tricks
- Interactive e-learning to review topics or see additional examples (for selected courses)
- · Quick Reference cards.

The minimum number of attendees for a training course is specified on each specific class.

Course Registration

All our Training Courses are published on our Global Calendar on our <u>Academy</u> website.

You can check dates, language, location and availability for each Training Course and register directly for the selected event. Courses can be held at Tagetik offices or onsite at the customer location.

Administrator Learning Path



- **Data Model**: data model definition and maintenance, aggregation structures, and relevant information for each Dimension.
- Output Reporting: basic reporting features for data browsing and data entry which represent the pillars for any CCH® Tagetik implementation.
- Data Collection: basics of the application process setup and all features for collecting data.
- Consolidation/Planning/Collaborative Office: setup and maintenance of a specific Process
- On-line test: optional on-line test that covers the previous 4 steps. The test can be used to self-evaluate your skills on CCH® Tagetik and help you understand the areas where you can improve. Passing the test will unlock a "Certified Administrator" Diploma.

Project deep dive: this last step is <u>not</u> an actual course, but a recommendation from the Academy on how to complete your learning path. it is vital to study your <u>own project documentation</u> to link the best practices, tips and features studied in the standard courses with your actual application. It is also a great chance to review your knowledge and to understand if some areas need additional practice.

Why should I follow this path?

This learning path is designed to provide you the core knowledge, together with Tips and Best Practices, to efficiently maintain and manage your application. Remember that you can follow this path at your own pace, even if we recommend to respect the content and order we provide.

The full learning path is the only way to get the most out of your CCH® Tagetik and of your time investment in becoming a real Certified Administrator.



Power User Learning Path



- **Data Model**: data model definition and maintenance, aggregation structures, and relevant information for each Dimension. This module can be studied as e-learning or as a full class (optional)
- Output Reporting: basic reporting features for data browsing and data entry which represent the pillars for any CCH® Tagetik implementation.
- Vertical Topics: you can add to your path any Vertical topics that will be part of your daily job. ETL, FAM
 or Data Entry Design are only examples.
- On-line test: optional on-line test that covers the first 2 steps. The test can be used to self-evaluate your skills on CCH® Tagetik and help you understand the areas where you can improve. Passing the test will unlock a "Certified Power User" Diploma.

Project deep dive: this last step is <u>not</u> an actual course, but a recommendation from the Academy on how to complete your learning path. it is vital to study your <u>own project documentation</u> to link the best practices, tips and features studied in the standard courses with your actual application. It is also a great chance to review your knowledge and to understand if some areas need additional practice.

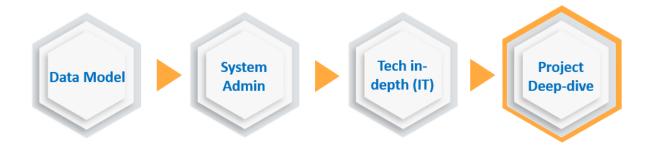
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IT/Sysadmin Learning Path



- **Data Model**: data model definition and maintenance, aggregation structures, and relevant information for each Dimension. This module can be studies as e-learning or as a full class (optional)
- System Administration: setup and maintenance of the CCH® Tagetik Repository
- **Tech in-depth**: in-depth and hands-on look at Tagetik architecture, installation procedures and configuration. This step is reserved for IT specialists

Project deep dive: this last step is <u>not</u> an actual course, but a recommendation from the Academy on how to complete your learning path. it is vital to study your <u>own project documentation</u> to link the best practices, tips and features studied in the standard courses with your actual application. It is also a great chance to review your knowledge and to understand if some areas need additional practice.

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• Technical Advanced Operations: standard class



Overview Training

Duration: 1 day

Audience: Project team members

Prerequisites: None

Objectives: The Overview Training course will provide attendees with the basic knowledge of CCH® Tagetik. The aim is to provide all involved team members, in a project, with the minimum skills necessary to cooperate efficiently. In addition another goal is to ensure that a high quality analysis phase takes place at the beginning of the project to create the conditions for an effective and productive project team awareness.

- 1. Software architecture.
- 2. Dimensions.
- 3. Software interfaces.
- 4. Available methods for loading and processing Data.
- 5. High-level description of Reporting tool:
 - a. Main concepts of Forms design.
 - b. Navigation and Data Entry modes.
- 6. How Tagetik approaches the business processes.
- 7. General Tips & Techniques and Best Practices.



Upgrade to HTML 5

Duration: 1 day

Audience: Administrators and Implementers

Prerequisites: Experience with previous CCH Tagetik versions

Objectives: This training course is aimed at Administrators/Implementers, who are currently using or implementing a previous CCH Tagetik version (CCH Tagetik 4) and are wishing to upgrade to the 5 version, or for those who are currently using CCH Tagetik 5 but are still with the FLEX interface. Attendees are expected to understand and know the basics of CCH Tagetik database administration and reporting. The course focuses on the main innovations introduced within the HTML5 interface and other functions, leading to an improved user experience.

Topics:

- 1. Navigating through the HTML5 interface
- 2. Customizing your home page
- 3. Using the Process cockpit
- 4. Data model setup and maintenance
- 5. Process definition (including business workflow)
- 6. New functionalities in HTML5
- 7. Next steps

Additional info: Available also as Virtual Classroom Training (VCT).



Data model

Duration: 1 day

Audience: Administrators and Implementers

Prerequisites: None

Objectives: This training course covers the basics of system dimensionality: data model definition and maintenance, aggregation structures and relevant information for each dimension.

Topics:

1. CCH® Tagetik architecture

- 2. Familiarization
- 3. Aggregation Structures
- 4. Interface navigation
- 5. Data model design
 - a. Periods
 - b. Scenarios
 - c. Categories
 - d. Accounts
 - e. Entities
 - f. Custom dimensions

Additional info:

• Interactive E-learning as additional asset included



Output Reporting

Duration: 2 days

Audience: Administrators, Power user and Implementers

Prerequisites: Data Model course & basic knowledge of MS Excel functionalities

Objectives: This training course explains how to design reports, using CCH® Tagetikreporting features.

Topics:

1. CCH® Tagetik Reporting introduction

2. Excel Client overview

3. Usage of a Form (Design, Navigation and Data Entry)

4. Parametric Forms

5. Basic dynamic forms

6. Smart Insight

7. Formatting best practice

8. Maintenance best practice

9. Basic usage of CCH® Tagetik style

10. Tips & Tricks

Additional info:

• Interactive E-learning as additional asset included



Data Collection

Duration: 1 day

Audience: Administrators and Implementers

Prerequisites: Data Model and Output Reporting

Objectives: This training course covers the basics of the application process setup and the main features

for collecting data.

Topics:

1. Usage of a Process cockpit

- 2. Application process design
 - a. Business workflow setup
 - b. Application process setup
- 3. Data collection
 - a. Data entry form design and usage
 - b. Predefined ETL usage
 - c. Custom ETL usage
 - d. Quick Data Loader usage
 - e. Journal creation
 - f. Data processing overview

Additional info:

• Interactive E-learning as additional asset included



Consolidation

Duration: 2 days

Audience: Administrators, Implementers and Consolidators

Prerequisites: Data Model, Output Reporting and Data Collection. Basic knowledge of Financial Consolidation is recommended.

Objectives: This training course provides the skills necessary to implement a basic consolidation process. It covers standard consolidation-related features such as Intercompany Reconciliation, Accounting Standard Principles and typical consolidation methods.

- 1. Contributor Overview:
 - a. Original data collection
 - b. Entity Journals
 - c. Submission/Approval process
- 2. Basic Administration overview:
 - a. Data Model configuration
 - b. Data collection/Consolidation Process configuration
 - c. Consolidation Scenario and Consolidation scope
- 3. Consolidator data processing setup:
 - a. Automated Elimination Logics
 - b. Ownership structure register management
 - c. Minorities Interests calculation
 - d. Currency Conversion
 - e. Equity Evaluation
 - f. Validation Rules
- 4. Consolidator duties:
 - a. Consolidator duties on Original Scenario
 - b. Consolidator duties on Consolidation Scenario
 - c. Data Analysis.
- 5. Tips & Techniques and Best Practices



Budgeting and Planning

Duration: 2 days

Audience: Administrator, Implementers IT Professional

Prerequisites: Data Model, Output Reporting, Data Collection, Database file management, basic SQL

Scripting Language (recommended)

Objectives: This training course covers the skills necessary to follow the full budgeting process: from data loading to customization of specific calculation logics through the implementation of advanced calculations (MDX-like). The course will also provide the ability to implement Profitability model leveraging the CCH® Tagetik built-in Allocation Engine. In addition, all skills necessary to create advanced and powerful Excel forms are included.

Topics:

1. Budgeting Process setup

- 2. Spreading tools
- 3. Asset Depreciation tool
- 4. Allocation engine
- 5. Calculation logics
- 6. Copy tools
- 7. Editable category pool



Collaborative Office

Duration: 1 day

Audience: Administrators and disclosure Contributors

Prerequisites: Data Model and Output Reporting (only for CCH® Tagetik integrated implementation)

Objectives: This training provides a basic overall knowledge of the set of processes available with CCH® Tagetik Collaborative Office. The attendees learn how to design collaborative documents, distribute the duties among the contributors and retrieve data from CCH® Tagetik or external attachments.

- 1. Uses of CCH® Tagetik Collaborative Office
- 2. General overview
- 3. Explanation of the most commonly used Front Ends (Web & Word)
- 4. Administrator's duties:
 - a. Document Type
 - b. Document Activity
 - c. Workflow Definition
 - d. User Rights
 - e. Collaborative Office Document creation
- 5. End-user's duties:
 - a. Overview of available functionality
 - b. Editing a Document Section
 - c. Compare multiple documents & track changes
 - d. Submission/Approval of Document and Sections
 - e. Create a complete Document
- 6. Tips & Techniques and Best Practices



Analytic Information Hub Basics

Duration: 2 days

Audience: Administrators, IT Professional and Implementers

Prerequisites: Data model, Output reporting, Database file management, SQL Scripting Language

(recommended)

Objectives: This training course covers the skills necessary to implement an analytical solution using the Analytical Information Hub that extends beyond the standard data model. Attendees will be taught the difference between the Financial and Analytical Workspaces, how to create analytical dimensions and different types of Datasets including standard, virtual and reference datasets. The course will provide the ability to configure the AIH calculation engine, called Data Transformation Package, and the use of data integration tools within the business workflow. Furthermore, attendees will learn how to use the reporting capabilities with the analytical workspace datasets.

Topics:

1. Analytical Workspace and Financial Workspace

- 2. Analytical Dimensions and Datasets
- 3. Data Transformation Package
- 4. Data integration tools (QDL, Datasource Mapping)
- 5. Analytical Workspace on reporting side
- 6. Virtual Datasets
- 7. Import/Export



Predictive Intelligence Basic

Duration: 1 day

Audience: Administrators, Implementers.

Prerequisites: Novice Certification, Analytical Information Hub Basic and Analytical Information Hub Pro

OR

Novice Certification, Analytical Information Hub Basic and Knowledge of Datasources and Parameters on Analytical Information Hub.

Objectives: This hands-on training course provides the necessary and sufficient knowledge to use the standard advanced analytics model in any CCH Tagetik environment, integrate data, run data processing and read the results.

Important:In this course the standard predictive model will be covered.

- 1. Machine learning concepts
- 2. Time series terminology
- 3. Prerequisites and case study presentation
- 4. Analytical Workspace set up
- 5. Data preparation and normalization
- 6. Machine Learning tasks usage
- 7. How to read data
- 8. What if analysis Comparison of different predictions



Solvency II

Duration: 1 day

Audience: Administrators

Prerequisites: Data Model

Objectives: The CCH® Tagetik Solvency II training course will provide attendees with the knowledge of how to navigate within the CCH® Tagetik Solvency II Pre-Package Solution (PPS). Another goal is to learn how to extend the data model of the Solvency II template with customer specific information, such as entities and the organization hierarchy.

- 1. Implementation scenarios for CCH® Tagetik Solvency II
- 2. Project approach, resourcing and attention points
- 3. Introduction CCH® Tagetik Solvency II PPS
- 4. QRT analysis
- 5. Data delivery methods
- 6. Data model additions (based on best practice)
- 7. Consolidation (solo vs. group)
- 8. Other (local) reporting requirements: Nationale Staten, ZIN (if applicable)



Lease Accounting Solution (IFRS 16 & ASC842)

Duration: 2 days

Audience: Administrators and/or key users and project team members, Implementers

Prerequisites: Basic knowledge of lease accounting regulation (IFRS16 & ASC842); Data Model and

Output Reporting courses.

Objectives: This training gives insights in navigating within the CCH® Tagetik Lease Accounting Solution, both from an End User and Administrator perspective. Also an important part of this training is to get familiar with the CCH® Tagetikterminology, which is an important asset for successful meetings in the design phase. Moreover, this training will provide the ability to leverage all the prepackaged assets (e.g. data entry reports, ETL, carryforward functions, data model) thanks to different hands-on sessions performed throughout the course.

Topics:

1. Lease Accounting Solution overview

2. Behind the solution: Lease Accounting & AIH

3. Lease Accounting data model

4. Lease Accounting standard import ETL

5. Lease Accounting process configuration

6. Lease Accounting advanced functionalities



Account Reconciliation

Duration: 2 days

Audience: Administrator and Implementers

Prerequisites: Data Model, Output Reporting, Data Collection, ETL and AIH basic.

Objectives: To gain the skills and knowledge necessary to tailor the prepackage solution offered by CCH

Tagetik to the Account Reconciliation closing process of the customer.

Topics:

1. Introduction: what is Account Reconciliation

2. The Solution

a. End User point of view

b. Administrator/Implementer point of view

3. What's new?



ETL Foundation

Duration: 1 day

Audience: Administrators, Data integration specialists and Implementers

Prerequisites: Data Model (mandatory), Output Reporting & Data Collection (recommended) training, SQL programming language, understanding of ETL concept & processes.

Objectives: This training covers the basics of the CCH® Tagetik ETL module configuration and provides best practices. The attendees will configure an ETL with mapping functionality that can load financial data for a Tagetik implementation. With this knowledge you can also update existing ETL's with new functionality according to changes and/or new requirements.

- 1. Introduction
- 2. ETL Overview
- 3. ETL Definition
- 4. Structure (ETL Domain)
- 5. E Extraction
- 6. T Transformation
- 7. L Loading
- 8. Definition and Execution (data processing)
- 9. Troubleshooting and data analysis
- 10. Utilities



Data Integration

Audience: Administrators, AIH specialists and Implementers

Prerequisites: Data Model (mandatory), Output Reporting & Data Collection (recommended) training, AIH Basics (mandatory), understanding of ETL concept.

Objectives: This training teaches how to setup and use the RESTful API in CCH® Tagetik. With the concepts explained, the attendees will learn how to expose and consume data and metadata within AIH via RESTful API. As well the training will provide information on performances, typical OData connections and the available types of authentication.

- 1. Data flow in CCH Tagetik
- 2. RESTful API in CCH Tagetik
- 3. How to configure CCH Tagetik to use RESTful API
- 4. Consuming and exposing via OData
- 5. Expose metadata and Analytical dimensions
- 6. Data Target
- 7. AIH components and OData service
- 8. Performances
- 9. Available authentication and OData typical connections
- 10. Audit data processing exposed via OData
- 11. Running MDM, Import/Export AW, Import/Export Repository, DTP and Data Source mapping via RESTful API



Functional Application Management

Duration: 1 day

Audience: Administrators and Implementers

Prerequisites: Data Model

Objectives: the Functional Application Management (FAM) course will give anybody who has an Administrator role the necessary skills to maintain the CCH® Tagetik application. During the course students will learn to get an application ready for the coming year. But also learn how to adjust the application in case of mergers, acquisitions, new accounts, new products or any other changes in the datamodel. In most companies changes to the datamodel will occur on regular basis. It's important that administrators are aware of the implications of these changes and when they need to run a deployment. This course aims to make Ccompanies less dependent of their CCH Tagetik Implementation partner

Topics:

1. Maintain datamodel

2. Maintain workflow & process

3. Maintain consolidation

4. Other application management tools



End User Basics - Consolidation

Duration: 1 day

Audience: Consolidation Contributors, Consolidation End users

Prerequisites: None

Objectives: Learn how to use the basic functions of navigating and running reports, contributing to consolidation process and finally running a (sub)consolidation in a CCH Tagetik environment.

This hands-on training course learns you how to use the basic functions of navigating and running reports, contributing to consolidation process and finally running a (sub)consolidation in a CCH Tagetik environment.

- How to navigate & run a report via web
- · How to contribute data
- How to consolidate data
- How to perform a Simulation: What-if Analysis with financial workspace of CCH® Tagetik



End User Basics - Budgeting & Planning

Duration: 1 day

Audience: Budgeting & Planning Contributors, Budgeting & Planning End users

Prerequisites: None

Objectives: Learn how to use various budgeting & planning functions and tools in a CCH Tagetik

application.

This hands-on training course provides knowledge of various budgeting & planning functions and tools in a CCH Tagetik application.

Topics:

• How to run a report via web

- How to collect Forecast 2 data
- How to collect Multiyear plan data
- How to collect Budget data



System Administration

Duration: 1 day

Audience: Implementers, Administrators

Prerequisites: Data Model, Output Reporting and Data Collection courses, as well as experience in project development which is recommended.

Objectives: This hands-on training course provides a overall basic knowledge of the configurations, functions and tools that are available in the Repository, with a focus on application administration.

- 1. General Overview of Repository
- 2. Configuration
 - a. User & Roles Creation/Configuration
 - b. Security Configuration
 - c. Database Configuration
 - d. General Application Configuration
- 3. Data Migration
 - a. Import/Export (Moving Data between Environments)
 - b. MDM
- 4. Utilities & Tool
 - a. Scheduler
 - b. Query Analyzer & Database Objects
- 5. Monitoring & Logging
 - a. User Activities: Audit and Monitoring
 - b. System Resource Monitoring
 - c. Data Processing Monitoring
- 6. Tips & Techniques and Best Practices



Technical Overview training

Duration: 1 day

Audience: IT Professional, Help Desk and Implementers

Prerequisites

• Knowledge of MS Office Excel, Word and PowerPoint usage and configuration

• General experience with Windows, Mac, or Linux-based computers

Objectives: The CCH® Tagetik Technical Overview course will provide attendees with the basic introduction to Tagetik applications from a technical perspective including an overview of the application architecture and the additional components that make up the CCH® Tagetik family of products. The course will also discuss basic maintenance, upgrading, and troubleshooting. The goal of this course is to provide anyone with minimal or no background in CCH® Tagetik and with any level of technical skills with the understanding of the technical architecture of CCH® Tagetik.

- 1. Introduction to Core CCH® Tagetik Application Architecture and infrastructure
- 2. Important Aspects of Resource Estimation
- 3. Overview of Installation/Upgrade of the Application and Add-in
- 4. Introduction to Additional Tagetik Components and Integrations
- 5. Introduction to Basic Maintenance, Operations, and Troubleshooting



Technical Standard Operations

Duration: 3 days

Audience: Technical Consultants, IT professionals

Prerequisites

• Knowledge of Data Model, Output Reporting, Data Collection, System Administration, and ETL Foundations via Academy course participation or virtual materials.

Practical Experience in the following areas:

Database Management,

• Usage and management of any JEE compliant application server and/or with a JDK/JVM/Java,

 Microsoft Office and .Net Add-ins, Basic OS administration and configuration of Windows and/or Linux.

Objectives. The Technical Standard Operations Course (TSO) will provide participants with an in-depth and hands- on look at the application and infrastructure architecture, installation procedures and configuration. Through exercises students will learn the application technical architecture and the basics of installing, configuring, and maintaining the CCH Tagetik application. Both technical details and practical hands-on experience will be provided. For practical hands-on experience, participants will work on their own servers to install an AS server, configure a RDBMS (i.e. SQL Server, or PostgreSQL).

⚠ Important:This course is relevant to on-premises or private cloud deployments of the application

- 1. Overview of Application & Infrastructure Architecture
- 2. Installation on Windows/WildFly/SQL Server
- 3. Installation of .Net client(s)
- 4. Upgrade of the application on server and end-user PC
- 5. Basic IT Maintenance and Operations
- 6. Overview of available Technical Tools
- 7. AS & Application System Properties and Configuration
- 8. SALES, PRESALES Technical Services such as sizing and compatibility



Technical Troubleshooting

Duration: 1 day

Audience: Technical Consultants, IT professionals

Prerequisites

• Technical Standard Operations (TSO) participation.

• Experience with the CCH Tagetik application in the following areas:

• installation, upgrades, usage and management of a JEE compliant application server and RDBMS,

Basic Windows and/or Linux OS administration and configuration.

Objectives: This course will provide participants with an in-depth and hands-on look at the tools and knowledge to successfully troubleshoot basic technical problems related to application and infrastructure configuration and usage.

A Important: This course is relevant to on-premises or private cloud deployments of the application

- 1. Sources of Information within the application and on the servers, i.e. audit and server logs
- 2. Server side Troubleshooting
- 3. Client side Troubleshooting
- 4. Troubleshooting Other Problems such as networking, authentication, backups, performance.
- 5. Issue Management Workflow, Customer Expectations, Interaction with Support



Technical System Design

Duration: 1 day

Audience: Technical Consultants, IT professionals

Prerequisites

• Technical Expert Certification Level

• and/or equivalent experience with the application in the following areas:

· Design of customer infrastructure architecture, application installation, upgrade procedures, Usage and management of a JEE compliant application server and RDBMS,

• Basic Windows and/or Linux OS administration and configuration.

Objectives: The goal of this course is to provide participants with an overview of the best practice application architecture as it relates to different requirements such as large and very large projects, projects with special infrastructure requirements, infrastructure with special limitations, and HA/DR/LB architecture.



⚠ Important:: This course is relevant to on-premises or private cloud deployments of the application

Topics:

1. Overview of basic and complex infrastructure architecture

2. Sizing and Infrastructure

3. HA/DR architectures

4. Third Party Software Integrations for Reporting and Analytics

5. AIH Architecture

6. Small Projects and other Scenarios & Requirements



Technical Advanced Operations

Duration: 1 day

Audience: Technical Consultants, IT professionals

Prerequisites

• Technical Expert Certification Level

• Extensive experience with technical aspects of the application.

Objectives: This course will provide participants information and practical hands-on experience on operations and topics not covered in other courses and often not covered in documentation including integration with external authentication via LDAP, SAML and others, integration with third party software such as Qlik, application security and encryption, etc. Minor adjustments on the topics covered possible based on participant requests.

A Important: This course is relevant to on-premises or private cloud deployments of the application

- 1. Authentication Integrations
- 2. Qlik Integration
- 3. Application Security, Encryption & Privacy
- 4. Performance Tuning
- 5. Advanced Client Tier Configuration (Launcher, Citrix/TS for multiple users)
- 6. APIs and Endpoints for control and data integration
- 7. Network Troubleshooting
- 8. Notifications and Email
- 9. Additional Topics as time permits



Customized End-user Training (if applicable)

CCH® Tagetik don't usually provide STANDARD training for End Users. They are usually trained on customer's application by project team members.

The Academy offers the possibility to develop a Customized End-user Training.

Duration: to be determined based on training design session

Prices: Prices and timing to be discussed with the implementation team. Customized End-user training is quoted as a separate project, on a T&M approach.

Audience: End-Users

Prerequisites: none

Objectives: This customized training focuses on End-user activities (cockpit, matching, data collection, submission etc.). It is Developed on the Customer's application and can follow different approaches (Train-the-trainer, class, e-learning, blended approach etc.)

IMPORTANT: Customized End-user training courses are developed on-demand for a specific Customer.

Prices, availability, timing and other details should be discussed with your training representative. Please mind that this service might not be available in every region.

