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# Customer Training Catalogue

## Contributor (Data Entry or Report Design)

CCH® Tagetik | ACADEMY

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This learning path is designed to provide you the necessary knowledge, together with Tips and Best Practices, to make the most out of your application. You will be able to contribute and use CCH Tagetik as well design and maintain reports . 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 Contributor.

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## Welcome to the CCH® Tagetik Academy

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.

### Which Learning Paths are available?

We designed recommended Learning Paths 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, Contributor or System Administrator. Standard End-User training are available, while customized courses for End-Users can be developed on-demand. For more information about dedicated learning path, visit the [Customer-dedicated page](#)

### What is the Academy Training Approach?

The Academy provides 2 main training approaches:

- **ILT - Instructor Led.** 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.
- **Self-paced.** Self-paced courses are designed to be followed and completed at your own pace. Every self-paced course contains a theory part (from domain explanation to product technical details), a demonstration part with Videos or Simulation recorded on a training application and a dedicated time on a sand-box to practice with guided exercises.

The choice between ILT or Self-paced is done by the Academy according to the topic. You will find this information available for each course (Training Approach).

### How can I register to a Course?

All our Public Training Courses are published on our Global Calendar on our [Academy website](#).

- You can check **dates, language, location** and **availability** for each Training Course and register directly for the selected event.
- ILT Courses can be held remotely, at Tagetik offices or on-site at the customer location.
- Even if we try to run all our scheduled classes, we might need to insert a minimum number of attendees for a training course (usually 3).



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### **I'm interested in a Course, but I cannot find it in the Schedule. What should I do?**

We usually publish our schedule on a 6 month basis, to better adapt to the market needs. If you cannot find a public date that suits your needs, you can always ask your Academy representative about opportunities to have an on-demand class.

On-demand classes are subjected to trainer availability and should be discussed well in advance.

For additional information, please contact your local Academy representative, or write to [info.academy@wolterskluwer.com](mailto:info.academy@wolterskluwer.com)



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## Data Entry Contributor Learning Path

There are 2 main type of Contributors, with a significant different in training courses we recommend:

- Data Entry focused Contributors
- Data Entry + Report Design focused Contributors

This page focuses on the Data Entry Contributor.

### 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 perform all your Contributor duties, both from a Data Entry and from a Report design perspective (if required). Remember that you can follow this path at your own pace, even if we recommend to respect the content and order we provide.

Following this path is the best way to get the most out of your CCH® Tagetik and of your time investment in becoming a real skilled Contributor.

### Data Entry Contributor

The recommended courses below can fit your needs depending on the type of activities and the area you are in charge of. So for example if you are a Data Entry contributor for Consolidation, the "Consolidation End-user" training course is the one we recommend.

- Consolidation End-user
- BP&F End-user
- IFRS16 & ASC842
- IFRS17 101
- **"Customized" End User Training.** We can design and develop a specific End-user training tailored on your application. See the details in the dedicated page



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## Data Entry + Report Design Contributor Learning Path

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### Data Entry + Report Design Contributor

Data Entry recommended course will depend on the area of specialization, while the Report Design courses are common to all Contributors

#### Data Entry (area specific):

- Consolidation End-user
- BP&F End-user
- IFRS16 & ASC842
- IFRS17 101
- **"Customized" End User Training.** We can design and develop a specific End-user training tailored on your application. See the details in the dedicated page

#### Report Design (common):

- Data Modeling
- Output Reporting
- (Optional) Advanced Reporting



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## End User Training - Consolidation

**Training approach:** Self-paced

**Duration:** 1 day

**Audience:** Consolidation Contributors, Consolidation End users

**Prerequisites:** None

**Objectives:** This course will teach you how to collect original data, run consolidation-specific data processing and generate consolidated financial statements.

**Topics:**

- What it means to perform consolidation in CCH Tagetik
- How to predispose data, perform data entry and upload it via QDL
- How to detect errors and solve problems, including how to make data adjustment and manage IC declarations and matching
- How to reclassify data to make it compliant to IFRS regulations
- How to generate consolidable data and ultimately create consolidated financial statements





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## End User Training - Planning

**Training approach:** Self-paced

**Duration:** 1 day

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

**Prerequisites:** None

**Objectives:** This hands-on training course will teach you how to use various budgeting & planning functions and tools in a CCH Tagetik application.

**Topics:**

- How to set targets for the next three years
- How to apply multiple planning logics in CCH Tagetik, such as Zero budgeting, Incremental budgeting, and Driver-based budgeting
- How to perform data entry and upload data via QDL
- How to use Cash Flow Planning reporting tools
- How to pre-populate a forecast and create your own report in CCH Tagetik directly



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## Lease Accounting Solution (IFRS 16 & ASC842)

**Training approach:** ILT - (Instructor Led)

**Duration:** 2 days

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

**Prerequisites:** Basic knowledge of lease accounting regulation (IFRS16 & ASC842), Data Modeling, Output Reporting, Data Collection, Financial Modeling and Reporting, Process Governance & User Rights, Data Integration with DTP (or Data Model, Output Reporting)

**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® Tagetik terminology, 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



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## IFRS 17 101

**Training approach:** ILT - (Instructor Led)

**Duration:** 2 days

**Audience:** Consultants and Implementer Partners (currently working on projects or with prior authorization)

**Prerequisites:** Data Modeling, Output Reporting, Data Collection, Financial Modeling and Reporting, Process Governance & User Rights, Data Integration with DTP (or Data Model, Output Reporting). Knowledge of IFRS17 Regulation and CCH® Tagetik Administration.

**Objectives:** This training course provides consultants with a foundation in the use and configuration of the IFRS17 Starter Kit, in addition to an introduction to the main topics of the IFRS17 accounting Standards. During the course, participants will gain knowledge of the IFRS17 starter kit, its engine, the inputs which are required to the tool and configuration tables. As well as theoretical topics, the course includes an hands on workshops and a practical case study.

### Topics:

1. Introduction to the IFRS Solution
2. IFRS Solution Architecture and Engine
3. IFRS Input Data Model
4. IFRS Configuration and Reference Tables
5. Standard IFRS Workflow and Calculation Steps
6. IFRS Reporting
7. Case Study on BBA



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## Customized End-user Training

CCH® Tagetik Academy provides STANDARD training for End Users (both in Consolidation or Planning).

The Academy offers the additional possibility to develop and deliver a Customized End-user Training, tailored on your needs and designed on your application.

**Training Approach:** see below

**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.)

**Possible Deliverables (that can be mixed):**

- ILT classes with Customer exercises
- Train-the-trainer approach, training Customer trainers
- E-learning on customer application
- DAP (Digital Adoption Platform) guided click-through journeys on Customer application
- Change management material

### Duration and prices

The breadth and scope of a Customized End-user training depends on the Customer needs and requests. So duration, media, audience, approach and deliverables are a result of requirement discussion between Customer and Academy advisor.



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# Data Modeling

**Training approach:** ILT - (Instructor Led)

**Duration:** 1 day

**Audience:** Administrators and Consultants

**Prerequisites:** Basic knowledge of MS Excel

**Objectives:** This training course covers the basics of data modeling and dimensionality: dimensions, datasets, aggregation structures, their definition and maintenance.

**Topics:**

1. CCH Tagetik introduction
2. CCH Tagetik architecture
3. Data model concepts
4. Interface navigation
5. Dimensions
  - a. System dimensions
    - Period
    - Scenario
    - Currency
    - Entity
    - Account
    - Category
  - b. Custom dimensions
  - c. Analytical dimensions
6. Aggregation structure
7. Analytical workspace
  - a. Datasets



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## Output Reporting

**Training approach:** ILT - (Instructor Led)

**Duration:** 2 days

**Audience:** Administrators, Contributors and Consultants

**Prerequisites:** Data Modeling, basic knowledge of MS Excel

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

### Topics:

1. Reporting concepts
2. Excel client overview
3. Line by line form
4. Multidimensional form
5. Matrices
  - a. Filters
  - b. Parameters
6. Cell fields
7. Currency management
8. Time roll-up
9. Dynamic form design
10. Tagetik Style
11. Hyperlinks
12. Query
13. Smartinsight



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## Advanced Reporting

**Training approach:** ILT - (Instructor Led)

**Duration:** 2 days

**Audience:** Administrators, Contributors and Consultants

**Prerequisites:** Data Modeling, Output Reporting, Data Collection, Financial Modeling and Reporting. Knowledge of MS Excel.

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

### Topics:

1. Advanced dynamicity
2. Dependent parameters
3. Data validation
4. Override function
5. Data validation query
6. Form optimization
7. Performances
8. Design guidelines
9. Technical settings
10. Hide function
11. Conditional editability
12. Implementation of complex form
13. Managing dynamic form and complex formulas
14. Maintenance
15. Break back
16. Data processing from DE Form
17. Drill-through query
18. Form settings



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19. Advanced FST formulas
  20. Reference FX rates
  21. Report Bursting (e-learning)

