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# Complete Training Catalogue

## For Consultants and Customers

CCH® Tagetik | ACADEMY

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This catalogue contains all the training courses offered by the Academy. Some courses are more recommended for Customers and some for Consultants (you can refer to the dedicated catalogues by "role" in the Academy page)

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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](#)

Each Learning Path shows the recommended classes and actions for an efficient on-boarding and fast enablement as a CCH® Tagetik Platform Builder, Platform Specialist, Solution Pro or Solution Champion. These learning paths are focusing on Consolidation, Budgeting Planning & Forecasting, Technical Knowledge or Regulatory Solutions such as ESG, Pillar 2, Lease Accounting (IFRS16) and IFRS17. For more information about dedicated learning path, visit the [Consultant-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.



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- 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 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

**Additional info:**

- Also as part of a Self-paced package (see [Self-paced Platform Builder](#))



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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

## Additional info:

- Also as part of a Self-paced package ([Self-paced Platform Builder](#))



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# Data Collection

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

**Duration:** 1 day

**Audience:** Administrators, Contributors and Consultants

**Prerequisites:** Data Modeling and Output Reporting

**Objectives:** This training course reviews the main data collection tools, and it shows participants how to run them. It also teaches attendees how to create and use data entry forms.

## Topics:

1. Concept of
  - a. Data collection
  - b. CCH Tagetik process
  - c. Business workflow
2. Introduction of data collection tools
  - a. Predefined ETL
  - b. Quick data loader
  - c. Data transformation package
3. Data entry form design
  - a. Editability
  - b. Line by line
  - c. Multidimensional matrices

## Additional info:

- Also as part of a Self-paced package (see [Self-paced Platform Builder](#))



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# Financial Modeling and Reporting

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

**Duration:** 1 days

**Audience:** Administrators, Contributors, Consultants.

**Prerequisites:** Data Modeling, Output Reporting, Data Collection.

**Objectives:** This training course introduces the use of Financial workspace, the specific features of the system dimension, the basics of financial data collection tools and how to design report and data entry forms to collect financial data.

## Topics:

1. Introduction to Financial workspace
2. Overview on built-in data processing
3. FW Data model features
  - a. Tables
  - b. Accounts and signs
  - c. Period length
  - d. Variation and details
4. FW Data collection tools
  - a. Predefined ETL
  - b. Financial workspace mapping
5. Output reporting, Financial statements templates and KPI
6. Data entry forms
  - a. In local and transactional currency
  - b. With control groups
7. Drill down
8. Data Submission

## Additional info:

- Also as part of a Self-paced package (see [Self-paced Platform Builder](#))



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# Self-paced Platform Builder

**Training approach:** Self-paced

**Duration:** Self-paced e-learning + allotted practice time on a cloud sandbox. Equivalent to 5 days worth of training

**Audience:** Administrators and Consultants

**Prerequisites:** Basic knowledge of MS Excel

**Objectives:** This training course covers the foundation knowledge for a Platform Builder into 1 package. The content is equivalent of the 4 courses:

- Data Modeling
- Output Reporting
- Data Collection
- Financial Modeling and Reporting

## Topics:

1. The topics covered are the same as the Platform builder courses:
  - a. Data Modeling
  - b. Output Reporting
  - c. Data Collection
  - d. Financial Modeling and Reporting
2. The package includes:
  - a. E-learning with Theory and Demos
  - b. Sandbox with guided exercises for practice
  - c. Touch points with a Tutor (frequency and date can change by country)
  - d. End-to-end Business case (frequency and date can change by country)

## Additional info:

- If you prefer the ILT version, look in this catalogue for the equivalent courses.



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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)
  22. Power BI (e-learning)



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## Process Governance and User Rights

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

**Duration:** 1 day

**Audience:** Consultants, Administrators, Contributors

**Prerequisites:** Data Modeling, Output Reporting, Data Collection, Financial Modeling and Reporting

**Objectives:** This training course enables to define the setup of the data collection components: starting from requirements, you will be able to create the business workflow, to configure all the process ingredients and to define the user rights of an application.

### Topics

1. Business workflow
  - a. Step
  - b. Task list
2. Processes
  - a. Business cycle
  - b. Organizational hierarchy
  - c. Workflow mapping
  - d. Process data model
  - e. Rules and data processing
3. User rights
  - a. User rights on dimensions
  - b. Reference user
4. Application deployment



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## Data Integration with DTP

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

**Duration:** 1 day

**Audience:** Administrators, Consultants

**Prerequisites:** Data Modeling, Output Reporting, Data Collection, Financial Modeling and Reporting and SQL basic knowledge.

**Objectives:** Attendees will be taught the different types of Datasets including standard, virtual and reference datasets. The course will teach participants how to configure the AIH calculation engine, called Data Transformation Package, and to use data integration tools in the business workflow. Furthermore, attendees will learn to use filters, parameters and dictionaries to enhance the capabilities of DTP and other data integration tools.

### Topics:

1. Methods for loading data to Analytical workspace
1. Datasources
2. Use of dictionaries in AW
3. DTP with multiple steps of calculation
4. Aggregation functions
5. Main DTP operations (Insert, Enrichment, Join, Check)
6. Unpivoting data by DTP operations
7. Deploying data by DTP operations
8. Typical DTP filters
9. AW Parameters
10. Virtual dataset



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## Data Integration with ETL

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

**Duration:** 1 day

**Audience:** Administrators, Consultants

**Prerequisites:** Data Modeling, Output Reporting, Data Collection, Financial Modeling and Reporting and SQL basic knowledge.

**Objectives:** This training course covers the basics of the CCH® Tagetik ETL configuration module and provides best practices. Attendees will configure an ETL with mapping functionality that can load financial data for a Tagetik implementation. With this knowledge, they will also be able to update existing ETLs with new functionalities based on changes and/or new requirements.

### Topics:

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



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# Data Integration with RESTful API

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

**Duration:** 1 day

**Audience:** Administrators, Consultants

**Prerequisites:** Data Modeling, Output Reporting, Data Collection, Financial Modeling and Reporting. Understanding of CCH® Tagetik ETL concepts.

**Objectives:** With the concepts explained, participants will learn how to expose and consume data as well as metadata within AIH via RESTful API. In addition, the training will provide information on performance, typical OData connections and the available types of authentication. Data orchestration concepts are also included. Attendees will be taught to use an API client to run workflows with AIH and maintenance data processing.

## Topics:

1. RESTful API in CCH® Tagetik
2. How to configure CCH® Tagetik to use RESTful API
3. Consuming and exposing via OData
4. Expose metadata and Analytical dimensions
5. Data Target
6. Concepts of Data orchestration
7. Running Typical AW Data Processing using an API client
8. Performance
9. Available authentication and OData typical connections



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# System Administration

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

**Duration:** 1 day

**Audience:** Consultants, Administrators

**Prerequisites:** Data Modeling recommended (or 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.

## Topics:

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



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# Consolidation

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

**Duration:** 2 days

**Audience:** Administrators, Consultants and Consolidators

**Prerequisites:** Data Modeling, Output Reporting, Data Collection, Financial Modeling and Reporting, Process Governance and User Rights. Basic knowledge of Financial Consolidation recommended (or Data Model, Output Reporting and Data Collection).

**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.

## Topics:

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



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# Collaborative Office

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

**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.

## Topics:

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



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# Account Reconciliation

**Training approach:** Self-paced

**Duration:** Self-paced e-learning + allotted practice time on a cloud sandbox

**Audience:** Administrator and Consultants

**Prerequisites:** Data Modeling, Output Reporting, Data Collection, Financial Modeling and Reporting, Data Integration with ETL (or Data Model, Output Reporting, Data Collection, ETL , 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. End user activities
3. Administrator activities:
  - a. Introduction and Rules
  - b. Upload
  - c. Final configurations
  - d. Checks
4. Additional info



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# Transaction Matching

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

**Duration:** 1 day

**Audience:** Administrator and Consultants

**Prerequisites:** Data Modeling, Output Reporting, Data Collection, Financial Modeling and Reporting, Data Integration with ETL, Account Reconciliation. Consolidation basic knowledge is recommended (or Data Model, Output Reporting, Data Collection, ETL , AIH basic, Account Reconciliation).

**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
2. Case 1: General Ledger/Bank Statement (e.g. Account Reconciliation)
3. Case 2: IC matching (e.g. Consolidation)
4. Inside the Solution



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# Consolidation Advanced

**Training approach:** E-learning + ILT (Instructor Led)

**Duration:** 2 days

**Audience:** Consultants

**Prerequisites:** Data Modeling, Output Reporting, Data Collection, Financial Modeling and Reporting, Data Integration with ETL , Consolidation.

**E-learning Prerequisite:** The course includes an e-learning module (about 2 hours and 45 minutes) that provides the base knowledge necessary to attend the class. It must be finalized before the class and we strictly suggest to complete it at least 2 days before the class.

**Recommended:** Project experience on Statutory Consolidation projects, practical experience with all the topics covered in the Consolidation course (or Data Model, Output Reporting and Data Collection, Consolidation, ETL).

**Objectives:** This training course covers 4 of the most common topics of a standard Statutory consolidation project, such as Restatement and management of advanced event in the Ownership Structure Register and provides guidelines and best practices on how to approach to them.

## Topics:

1. First Consolidation:
  - a. Reason of a first consolidation
  - b. How to manage data from customers
  - c. Focus on the activities to perform on customers' data;
2. Common "events" of the year:
  - a. Acquisition
  - b. Change in ownership %
  - c. Increase/Decrease of Share Capital
  - d. Deconsolidation
  - e. Merger
3. Management vs Statutory consolidation: considerations about eventual different approaches;
4. Subgroups: Consolidation scenario or Segment reporting? Considerations on segment analysis and when to use consolidation scenarios or segment reporting

**Note:** Please note that the completion of the e-learning module is mandatory to the Consolidation Advanced assessment.



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## Champion Week/Exam - Consolidation

The Champion Week/Exam is an event that combines a dedicated session with CCH® Tagetik superstars of the Global Excellence Team with the Academy Champion Exam.

The event is organized in 2 main sessions:

1. **Excellence Session** (2 days) where best practices and challenging examples from the field are presented and discussed with the audience.
2. **Consolidation Champion exam** (2 days) where the candidate will be able to achieve the highest CCH® Tagetik certification.

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

**Duration:** 4 days

**Audience:** Consultants

**Prerequisites:** Consolidation Pro certification and Solution Design knowledge

### Excellence Session content

- Consolidation topics will be selected by the Excellence team and discussed depending on what's hot and new from the field
- The content of each session might be different

### Champion Exam content

- **In Scope**
  1. Understanding the business requirements and providing a Solution Design
  2. Hands-on:
    - a. Data modeling
    - b. Process and Workflows
    - c. Data Entry & Reporting (Financial Workspace and Analytical Workspace)
    - d. Consolidation setup (Rules, Logics, Dedicated data processes)
- **Out of Scope**
  1. Project Management skills
  2. Project Documentation (status meeting notes, change requests,...)



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## Exam Evaluation

- An evaluation framework assigns a score to each workshop.
- The final score will determine if the attendee has passed or failed the exam.
- **The evaluation criteria will be shared with the attendees during the exam.**
- Once your exam is passed, you will be able to download your Champion certificate.

Important: Evaluation of the Champion exam will be done with the final decision of the Academy Committee.



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# Planning and Forecasting

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

**Duration:** 2 days

**Audience:** Administrator, Consultants

**Prerequisites:** Data Modeling, Output Reporting, Data Collection, Data Integration with DTP, SQL Basic Knowledge.

**Objectives:** This training course introduces different concepts of planning and forecasting and shows the solutions to common planning and planning problems implemented with the tools of the Analytic information hub.

## Topics:

1. Introduction to planning and forecasting
2. Data model trends
3. DTP operations to:
  - a. Split data across dimensions and time
  - b. Copy data
  - c. Pivot/unpivot table
4. Reference datasets for:
  - a. Configuration
  - b. Transformation
  - c. Assumptions
5. Virtual dataset and datasource to:
  - a. Retrieve and prepare data to process
6. Business cases on:
  - a. Top-down planning
  - b. Bottom-up planning
  - c. Driver based planning
  - d. Assumptions
  - e. Reporting



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f. Versioning/Snapshot

g. Forecasting



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# Predictive Intelligence Basic

**Training approach:** E-learning + ILT (Instructor Led)

**Duration:** 1 day

**Audience:** Administrators, Consultants.

**Prerequisites:** Data Modeling, Output Reporting, Data Collection, Data integration with DTP (or Data Model, Output Reporting and Data Collection, Analytical Information Hub Basic).

**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.

## Topics:

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



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# Analytical Workspace Designer

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

**Duration:** 2 days

**Audience:** Administrators, IT Professional, Consultants with advanced Product knowledge.

**Prerequisites:** Data Modeling, Output Reporting, Data Collection, Financial Modeling and Reporting, Data integration with DTP.

**Objectives:** This training course covers the skills necessary to discuss, evaluate and choose among different design solution for AIH, including also technical considerations and advanced features to apply in project implementation.

## Topics:

1. General overview and specific consideration of design
2. Dataset design
  - a. Use of different datasets
  - b. Naming conventions
3. DTP design
4. Solution design workshop and discussion
5. Technical aspects of Analytic information hub
6. Technical design guidelines



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## Champion Week/Exam - Budgeting and Planning

The Champion Week/Exam is an event that combines a dedicated session with CCH® Tagetik superstars of the Global Excellence Team with the Academy Champion Exam.

The event is organized in 2 main sessions:

1. **Excellence Session** (2 days) where best practices and challenging examples from the field are presented and discussed with the audience.
2. **Budgeting & Planning Champion exam** (2 days) where the candidate will be able to achieve the highest CCH® Tagetik certification.

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

**Duration:** 4 days

**Audience:** Consultants

**Prerequisites:** Budgeting and PlanningPro certification and Solution Design knowledge

### Excellence Session Content

- Budgeting & Planning topics will be selected by the Excellence team and discussed depending on what's hot and new from the field
- The content of each session might be different

### Champion Exam content

- **In Scope**
  1. Understanding the business requirements and providing a Solution Design
  2. Hands-on:
    - a. Data modeling
    - b. Process and Workflows
    - c. Data Entry & Reporting (Financial Workspace and Analytical Workspace)
    - d. Calculation tools (such as MD Scripting, Allocation, Asset Depreciation, Forecast model, DTP,...)
- **Out of Scope**
  1. Project Management skills
  2. Project Documentation (status meeting notes, change requests,...)



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## Exam Evaluation

- An evaluation framework assigns a score to each workshop.
- The final score will determine if the attendee has passed or failed the exam.
- The evaluation criteria will be shared with the attendees during the exam.
- Once your exam is passed, you will be able to download your Champion certificate.

Important: Evaluation of the Champion exam will be done with the final decision of the Academy Committee.



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## ESG Solution 101

**Training approach:** Self-paced

**Duration:** Self-paced e-learning + allotted practice time on a cloud sandbox

**Audience:** Consultants

**Prerequisites:** Data Modeling, Output Reporting, Data Collection, Financial Modeling and Reporting, Process Governance & User Rights, Data Integration with DTP (or Data Model, Output Reporting, Data Collection, AIH Basics).

**Objectives:** In this self-paced course, you will learn how to set up our ESG & Sustainability Performance Management solution as a CCH Tagetik user.

**Topics:**

1. Usage of ESG Solution
  - a. Introduction of ESG (theory)
  - b. Overview of our ESG Solution
  - c. How to use our ESG Solution?
2. Set-up of ESG Solution
  - a. Recap of the first course
  - b. Overview of this course
  - c. How to use our ESG Solution?
  - d. How to set-up ESG Solution?
  - e. Hands-on practising in ESG Solution



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# ESG Solution 201

**Training approach:** Self-paced

**Duration:** Self-paced e-learning + allotted practice time on a cloud sandbox

**Audience:** Consultants

**Prerequisites:** ESG 101.

CCH Tagetik Excel Reporting AddIn pre-installed and ready to be configured.

**Objectives:** This hands-on self-paced training course provides an overall knowledge of the configurations, functionalities and modules tools that are available in the CCH Tagetik ESG & Sustainability Solution with a focus on application set-up and application usage from both administrator and end-user perspective.

**Topics:**

1. Introduction
  - a. Recap of ESG Basic Course
  - b. Overview of this ESG Pro Learning Path
2. How to start an ESG project?
  - a. How to scope an ESG project?
  - b. How to install and update CCH Tagetik ESG & Sustainability Solution?
3. Use cases of ESG Metrics & KPIs
  - a. How to set-up pre-configured GRI KPI?
  - b. How to set-up custom KPI?
  - c. How to collect & calculate GRI KPI data?
  - d. How to report GRI KPI data?
  - e. Learn from the field
4. Final steps
  - a. Q&A
  - b. Time to practice!



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## Global Minimum Tax - Pillar 2 101

**Training approach:** Self-paced

**Duration:** Self-paced e-learning + allotted practice time on a cloud sandbox

**Audience:** Consultants

**Prerequisites:**

- Data Modeling, Output Reporting, Data Collection, Financial Modeling and Reporting, Process Governance and User Rights, Data Integration with DTP (or Data Model, Output Reporting, Data Collection, AIH Basics).
- Basic knowledge of Financial accounting and Corporate Direct Tax.

**Objectives:**

Getting an understanding of the GMT Pillar 2 rules and how this is incorporated in the CCH® Tagetik GMT Pillar 2 solution.

**Topics:**

1. Introduction in Global Minimum Tax
2. Pillar 2 solution
3. Pillar 2, Initialization
4. Pillar 2, Safe Harbour
5. Pillar 2, GloBE full
6. Pillar 2, Output & Review



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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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## IFRS 17 201

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

**Duration:** 2 days

**Audience:** Consultants currently working on projects or with prior authorization

**Prerequisites:** IFRS17 Basic, Analytic Workspace Designer. Knowledge of IFRS17 Regulation and CCH® Tagetik Administration.

**Objectives:** This training course provides consultants with a deeper analysis on the IFRS17 Tagetik Solution Analytical Workspace, giving a technical explanation and overview of his main components (Datasets, DTP, Special Methods). During the course, participants will gain knowledge of the specific configurations that are mostly used during the project implementation phase and will be provided with the guidelines on how to debug some of the most common issues. As well as theoretical topics, the course includes an of hand on workshop and a practical case study.

### Topics:

1. Overview of IFRS17 Solution
2. IFRS17 Tagetik Solution Analytical Workspace
3. IFRS17 Solution Specific Configurations
4. Project implementation steps and Issues debug
5. Case study for advanced
6. Hands-on workshop



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# SCP Self-paced - Business Analyst 101

**Training approach:** Self-paced

**Duration:** Self-paced e-learning + allotted practice time on a cloud sandbox

**Audience:** Consultants

**Prerequisites:** Basic understanding of the Supply Chain field is recommended.

**Objectives:**

You will learn how Sales, Demand, Production and Capacity topics are being covered inside the software. You will also be taught on how to leverage standard documentation to collect customers Functional Requirements. Finally, an introduction to the most common Use Cases is also given, and at how to map Process Flows.

**Topics:**

1. Intro to Supply Chain Terminology and Process
2. Intro to SCP modules
  - a. System Navigation, Sales, and Demand Plan
  - b. Supply Plan
  - c. Production and Capacity plan
3. Implementation and System Architecture
  - a. System Implementation Project and Team
  - b. System Architecture
  - c. Aspects of building an instance
4. Customer Requirements Gathering



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## SCP Self-paced - Business Analyst 201

**Training approach:** Self-paced

**Duration:** Self-paced e-learning + allotted practice time on a cloud sandbox

**Audience:** Consultants

**Prerequisites:** SCP Self-paced Business Analyst 101

**Objectives:**

You will dive deeper into the potential of Demand, Supply and Production modules in the software. You will also be taught how data is structured and which are the most common planning horizons in SCP. Then, you will be given prompts on how to write a functional requirement document and a technical specification document. Lastly, you will learn how to map the customer processes into SCP workflows, with examples.

**Topics:**

1. Details of Demand Planning
2. Details of Supply Planning
3. Details of Production and Capacity Planning
4. Intro to Data Structures and Planning Horizons
5. How to Write an FRD and Tech Spec
6. How to Map Customer Process into Workflows



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## SCP Demand Planning

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

**Duration:** 1.5 days (12 hours)

**Audience:** Demand planners, sales, marketing, forecasters

**Prerequisites:** Knowledge of demand or sales target planning

**Objectives:** This training course teaches navigation and demand planning functions in CCH Tagetik SCP.

**Topics:**

1. SCP System Navigation Training
2. SCP Collaboration Hub
3. SCP Forecast Methods
4. SCP Reports Training
5. SCP New Product Introductions
6. SCP Demand Workflow Management
7. Tips & Tricks

**Additional info:** Exercises are included



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## SCP Supply Planning

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

**Duration:** 1.5 days (12 hours)

**Audience:** Buyers, supply planners, procurement, production, and capacity planners

**Prerequisites:** Knowledge of supply planning

**Objectives:** This training course teaches navigation and inventory management functions in CCH Tagetik SCP.

**Topics:**

1. SCP System Navigation Training
2. SCP Collaboration Hub
3. SCP Inventory Strategies
4. SCP Reports Training
5. SCP Supply Workflow Management
6. SCP Procurement
7. SCP Production and Capacity
8. Tips & Tricks

**Additional info:** Exercises are included



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## SCP Administration

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

**Duration:** ½ Day (4 hours)

**Audience:** Administrator of the SCP system

**Prerequisites:** Identified by supply chain team to be the system administrator of the system.

**Objectives:** This training course teaches the administration functions in CCH Tagetik SCP.

Topics:

1. SCP System Navigation Training
2. SCP Collaboration Hub
3. SCP System Status
4. SCP Administration Workflow Management
5. SCP Setup Functions
6. SCP ABC Classifier
7. Tips & Tricks

**Additional info:** Exercises are included



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## Supply Chain Planning Self-paced - 101

**Training approach:** Self-paced

**Duration:** Self-paced e-learning + allotted practice time on a cloud sandbox

**Audience:** Consultants

**Prerequisites:** Basic understanding of the Supply Chain field is recommended.

**Objectives:**

You will learn how Sales, Demand, Production and Capacity topics are being covered inside the software. You will also be taught on how to work with JSON system files and how each single file interact with each other to make it feasible to build an instance. You will also get an understanding of how to import and export data from the system. Finally, there will be a Business Case and you will be able to build a Fast Track instance.

**Topics:**

1. Intro to Supply Chain Terminology and Process
2. Intro to SCP modules
  - a. System Navigation, Sales, and Demand Plan
  - b. Supply Plan
  - c. Production and Capacity plan
3. Implementation and System Architecture
  - a. System Implementation Project and Team
  - b. System Architecture
  - c. Aspects of building an instance
4. System File Structures
  - a. Explanation of System File Structures
5. System Imports and Exports from Admin
  - a. Data Imports from the System Administration Panel
  - b. Data Exports from the System Administration Panel
6. End-to-End FastTrack Build
  - a. Business Case – Build a FastTrack Instance



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# Supply Chain Planning Self-paced - 201

**Training approach:** Self-paced

**Duration:** Self-paced e-learning + allotted practice time on a cloud sandbox

**Audience:** Consultants

**Prerequisites:** Supply Chain Planning Self-paced 101

**Objectives:**

You will dive deeper into the potential of Demand, Supply and Production modules in the software. You will also be taught how to build portions of an instance starting from a Tech Spec, on how to access Advanced Configurations and how to Troubleshoot. Eventually, you will be provided access to the Advanced Settings information in the software.

**Topics:**

1. Details of Demand Planning
2. Details of Supply Planning
3. Details of Production and Capacity Planning
4. Building from a Tech Spec
5. Introduction to Advanced Configurations and Troubleshooting
6. Advanced Settings



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## Supply Chain Planning Self-paced - 301

**Duration:** Self paced eLearning + allotted practice time on a cloud sandbox

**Audience:** Consultants

**Prerequisites:** Supply Chain Planning Self-Paced 201

**Objectives:**

This overview of the CCH Tagetik Supply Chain Planning software for Implementation Engineers will provide you with professional knowledge on highly technical content, use cases on common customer requests and best practices.

This course will let you dive deep in the CCH Tagetik Supply Chain Planning software. A Pro Implementation Engineer will find advanced topics in this training.

**Topics:**

1. Record Type Implementation Strategies and Use Cases
2. Advanced Configurations
3. Advanced Database Troubleshooting
4. SCP System Integrations



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# Technical Standard Operations

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

**Duration:** 3 days

**Audience:** Technical Consultants, IT professionals

**Prerequisites:**

- Product Expert certification
- 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.

**Objective:** This course will provide participants with an in-depth and hands-on look at the application and infrastructure architecture, installation procedures and configuration. The students will learn the application technical architecture and the basics of installing, configuring, and maintaining the CCH Tagetik application. 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

**Topics:**

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 and Application System Properties and Configuration
8. SALES, PRESALES Technical Services such as sizing and compatibility



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# Technical Troubleshooting

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

**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.

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

## Topics

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



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# Technical Advanced Operations

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

**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.

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

**Topics:**

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



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# Technical System Design

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

**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



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## End User Standard Training - Budgeting & Planning

**Training approach:** Self-paced

**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:**

1. How to run a report via web
2. How to collect Forecast 2 data
3. How to collect Multiyear plan data
4. How to collect Budget data



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## End User Standard Training - Consolidation

**Training approach:** Self-paced

**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.

**Topics:**

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



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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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# Academy Certified Trainer

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

**Duration:** 2 days

**Audience:** Consultants and Internal.

**⚠ Important:** The event is only accessible to Partners with an active Academy Certified Trainer contract.

## Prerequisites:

- **Personal requirement:** Being highly motivated and passionate about education.
- **Knowledge requirement:** CCH Tagetik Platform builder certification

## Objectives

1. Provide all the information and skills necessary to become a professional trainer and deliver professionally official CCH Tagetik training courses.
2. Provide the Trainer Certification of the CCH Tagetik Academy global network.

Please note that having a valid CCH Tagetik product certification:

1. Guarantees the necessary knowledge to deliver a successful class
2. Allows to easily understand the range of courses a trainer can deliver

E.g.: A Trainer certified as Platform Specialist:

1. CAN deliver Platform Builder and Platform Specialist courses;
2. CANNOT deliver Consolidation or Planning and Forecasting courses.

## Course Structure

The attendance is subject to the eLearning module completion named "Academy Trainer Certification - Theory". After the registration, you will receive an approval email containing instructions to self-enroll to this part.

The training is structured as follow:

1. Academy Trainer Certification - Theory (about 4 self-paced hours): provides the base knowledge necessary to attend the live practice class. A final assessment has to be successfully completed to move forward. We strictly suggest to complete the eLearning at least 2 days before the live class.
2. Live Class (2-days):



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- Day 1: Full-day, a mix of trainer-led, interactive sessions
  - Day 2: Attendees will be asked to work on two presentations (1x an assigned topic to manage a class and 1x product-related topic to be chosen among a list of options):
    - The first part of the day is a mix of trainer-led, interactive session with a final assignment leading up to the exam;
    - Second part of the day is the exam, the attendees need to present a CCH Tagetik topic in a didactical manner.

## Topics

The training course focuses on the CCH Tagetik Academy internal processes, as well as, on a set of theoretical and practical topics about professional education. Some of the topics covered are:

- Being confident in public speaking.
- Communicate effectively.
- Practice active listening
- Ensure participation.
- Organizing your thoughts
- Effective Storytelling.
- Managing your class
- Role play, gaming sessions and discussions
- Tips & Techniques and Best Practices
- Dry run exam Tagetik Product presentation

## Additional info

As a certified trainer, the attendee will be able to access the training material on our eLearning platform.

