# CCH Tagetik ACADEMY

Gain autonomy. Accelerate adoption. Maximize your investment.

Wolters Kluwer

Unleash the platform's full potential and transform your team into a CCH Tagetik Center of Excellence

Transformation brings about a monumental change for all stakeholders. CCH® Tagetik seamlessly integrates a vital component into this change management with continuous education. Through every twist and turn of the implementation lifecycle and beyond the exhilarating go-live moment, our Academy ensures your team is not just ready but absolutely thriving. Imagine the impact of learning paths tailored for every business profile, guiding your team from initiation to mastery. It's not just education - it's empowerment.
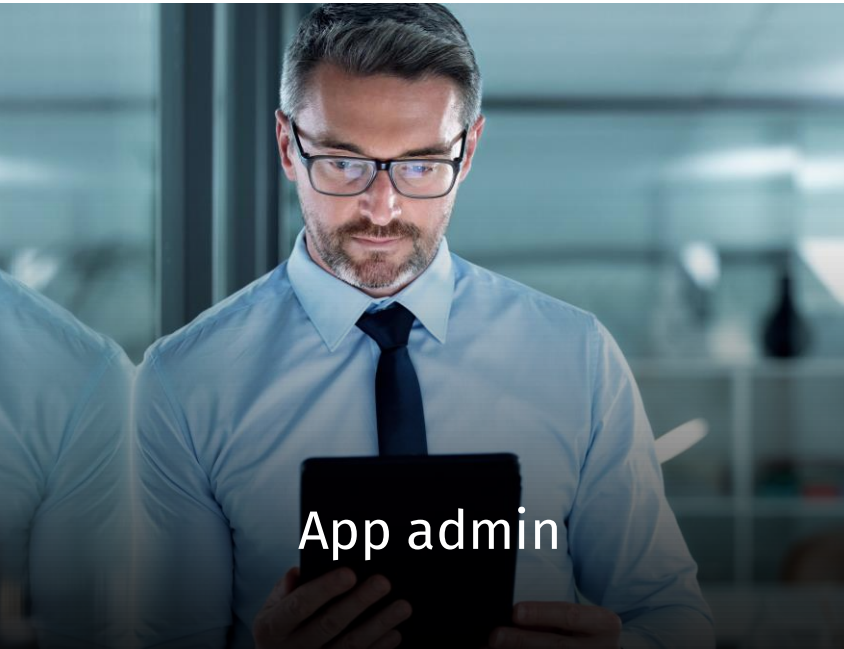
App admin

Customer developers willing to evolve CCH Tagetik knowledge from system foundation to business application expert, while configuring apps based on the specific company requirements.

Contributors
(business users)

End-users willing to make the most of their CCH Tagetik investment, interaction with the solution, reporting, data entry, validation.
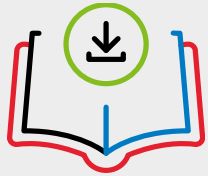
System & Tech admin

System administrators within the company that need to build the foundations of CCH Tagetik application architecture and mantain and secure business applications.

Why CCH Tagetik ACADEMY

Invest and get the most out of your new platform

Valuable educational resources

You'll find in each course a compilation of a robust set of materials:

- Course presentation slides for review and note taking
- Workbook complete with detailed instructions and hands-on challenges
- Quick reference card for at-a-glance learning and a process flowchart
- Expert CCH Tagetik Academy certified trainer

Trainers powered by passion

All trainers have successfully completed the Academy Trainer Certification, a program designed to provide trainers with a specific set of skills. They know how to:

- Engage a class
- Teach the ins and outs of every CCH Tagetik feature
- Accommodate different learning styles
- Help you make the most out of your CCH Tagetik application
- Transform a good (Italian!) coffee into energy for the class
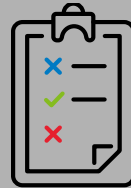
Specific CCH Tagetik sandbox to experiment

Every attendee is provided with a cloud sandbox application. Here, you'll get hands-on practice in every class. Each topic has its own workbook with detailed instructions and challenges that you must solve. Our philosophy is well summarized by Benjamin Franklin: "Tell me and I forget. Teach me and I remember. Involve me and I learn."
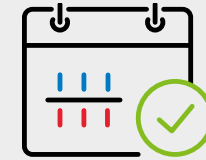
No-brainer learning paths to enhance adoption

Our customer learning path are designed for each specific role and need to:

- Optimize the daily work of administrators and end users through laminated quick reference cards and flowcharts
- Train new CCH Tagetik users using video tutorials, e-learning, custom manuals and slides for internal training
- We base all custom courses on your CCH Tagetik environment and comply with your branding guidelines
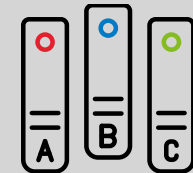
Cognitive learning best practices implemented

Tell me, show me, try me Academy training courses are designed according to cognitive learning best practices. For every topic, we follow a tell me, show me, try me approach. As an attendee, you'll understand why a topic is important, what it will help you achieve, and how to meet your goal. Through hands-on activities, our courses provide you with tip and tricks, challenges to solve, and detailed instructions if you need them.

Customer Learning paths

Enroll in our Academy customer learning paths today and propel your CCH Tagetik project to new heights.

Structured, in depth, step-by-step curriculum to secure success

Courses content in English and multi-language trainers

Flexible learning options: self-paced, virtual or in person

Certifications available after course completion

Customer learning paths

User	→	**BUILDER**	→	**SPECIALIST**	→	**PRO**	→

App Admin

Mandatory for all admin types

Designed exclusively for Admins with the aim to cover the essentials of creating effective data models that serve as the backbone of CCH Tagetik business applications

Curriculum

- CCH Tagetik introduction
- CCH Tagetik architecture
- Data model
- Interface and navigation
- Dimensions
- Analytical Information Hub
- Data collection
- Process and business workflow
- Data collection (tools and forms)
- Multidimensional matrix
- Financial workspace
- Data entry forms
- Submission
- Reporting
- Multidimensional and dynamic forms
- Style
- SmartInsight

System Admin

Tech Admin

Contributor

B&P — Budgeting & Planning specialist
Introduction to Planning and forecasting. Report design and usage of the data transformation package (DTP)

Budgeting & Planning PRO
Analytics model to predict and interpret data

FC&C — Financial Close & Consolidation specialist
Standard consolidation, standard and advanced report design, massive loading of consolidation information

Financial Close & Consolidation PRO
Advanced statutory consolidation process. Ownership management

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ExS — ESG, Regulatory or Tax
Introduction to CCH Tagetik expert solutions. Report design and usage of the data transformation package (DTP)

ESG PRO
Advanced usage of CCH Tagetik expert solutions

System — System specialist
User management and advanced reporting:
- User creation and configurations
- Data migration and utility tools
- Monitoring and auditing
- Advanced report design and optimization

System PRO
Advanced data integration accross different processes:
- Data integration with DTP
- Data integration with ETL
- Data integration via Restful API

Tech — Technical specialist
Infrastructure architecture, installation, configuration and troubleshooting

Technical PRO
Advanced functionalities on integration with external tools

Contributor Specialist
Contributors' standard actions in the business process (navigation and data entry)

Contributor PRO
Basic data modeling and dimensionality and advanced reporting

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CCH® Tagetik | ACADEMY
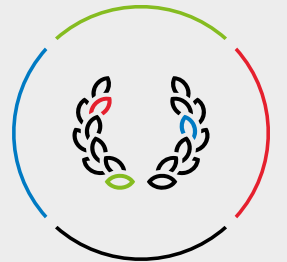
Who are you?

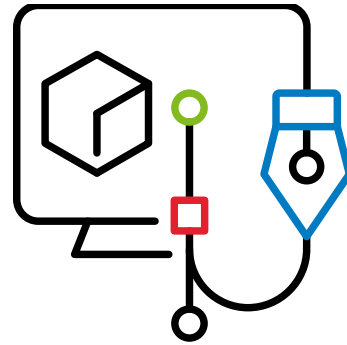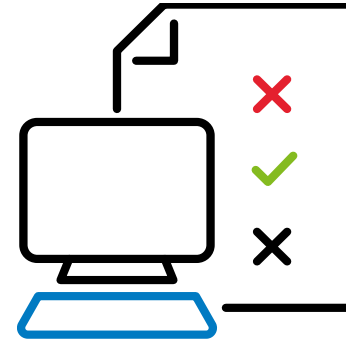*Let's find the right path for you*
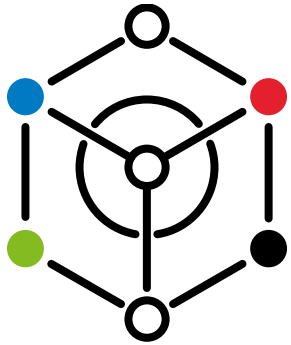
"I need to develop business applications in CCH Tagetik platform"

"I need to build CCH Tagetik's architecture and maintain the applications"

"I need to edit or build reports and work with CCH Tagetik on a daily basis"

Master in Budgeting & Planning

BUILDER

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- SmartInsight

6 days

- Data modeling (1 day)
- Data collection (1 day)
- Output reporting (2 days)
- Financial modeling and reporting (1 day)
- Process governance & user rights (1 day)

Budgeting & Planning

SPECIALIST

Introduction to Planning and forecasting. Report design and usage of the data transformation package (DTP)

Curriculum

- Intro to planning and forecasting
- Data model
- Virtual data set and data source
- Planning business case
- Advanced reporting functionalities (dynamicity, editability, drill down and drill through, form settings, report bursting, and BI)
- Analytic Information Hub data loading
- DTP management

5 days

- Planning & Forecasting (2 days)
- Advanced reporting (2 days)
- Data integration with DTP (1 day)

PRO

Analytics model to predict and interpret data

Curriculum

- Machine learning
- Time series
- Data preparation and normalization
- What is analysis
- Data interpretation
- Advanced usage of AIH
- Technical design guideline

4 days

- Planning & Forecasting Advanced (2 days)
- Analytical workspace designer (2 days)

Master in Financial Close & Consolidation

App Admin

BUILDER

Mandatory for all admin types

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Curriculum

- CCH Tagetik introduction
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- Data collection
- Process and business workflow
- Data collection (tools and forms)
- Multidimensional matrix
- Financial workspace
- Data entry forms
- Submission
- Reporting
- Multidimensional and dynamic forms
- Style
- SmartInsight

6 days

- Data modeling (1 day)
- Data collection (1 day)
- Output reporting (2 days)
- Financial modeling and reporting (1 day)
- Process governance & user rights (1 day)

Financial Close & Consolidation

SPECIALIST

Standard consolidation, standard and advanced report design, massive loading of consolidation information

Curriculum

- Contributors' day by day activities
- Consolidation data collection and workflow design
- Consolidation rules
- Data analysis
- Advanced reporting functionalities (dynamicity, editability, drill down and drill through, form settings, report bursting, and BI)
- Advanced report design and optimization
- Massive loading of consolidation data via ETL

5 days

- Consolidation (2 days)
- Advanced reporting (2 days)
- Data integration with ETL (1 day)

PRO

Advanced statutory consolidation process. Ownership management

Curriculum

- Ownership structure and management
- Acquisition and merger
- Deconsolidation
- Management vs statutory
- Subgroups

2 days

- Consolidation advanced (2 days)

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Master in Expert Solutions

App Admin

BUILDER

Mandatory for all admin types

Designed exclusively for Admins with the aim to cover the essentials of creating effective data models that serve as the backbone of CCH Tagetik business applications

Curriculum

- CCH Tagetik introduction
- CCH Tagetik architecture
- Data model
- Interface and navigation
- Dimensions
- Analytical Information Hub
- Data collection
- Process and business workflow
- Data collection (tools and forms)
- Multidimensional matrix
- Financial workspace
- Data entry forms
- Submission
- Reporting
- Multidimensional and dynamic forms
- Style
- SmartInsight

6 days

- Data modeling (1 day)
- Data collection (1 day)
- Output reporting (2 days)
- Financial modeling and reporting (1 day)
- Process governance & user rights (1 day)

Expert Solutions (ESG, Tax & Regulatory)

SPECIALIST

Introduction to CCH Tagetik expert solutions. Report design and usage of the data transformation package (DTP)

Curriculum

- Intro to CCH Tagetik expert solutions.
- Advanced reporting functionalities (dynamicity, editability, drill down and drill through, form settings, report bursting, and BI)
- Analytic Information Hub data loading
- DTP management

5 days

- ESG Solution 101
- Global Minimum Tax 101
- IFRS17 101
- Advanced reporting (2 days)
- Data integration with DTP (1 day)

PRO (only ESG)

Advanced usage of CCH Tagetik expert solutions

Curriculum

- Advanced functionalities in
- CCH Tagetik expert solutions
- Advanced usage of the Analytic Information Hub
- Technical design guideline

3 days

- ESG solution 201
- Analytical workspace designer (2 days)

Days might differ depending on the Expert Solution Course.
Please, reach out your Training Coordinator for further assistance.

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Master in System Admin

System Admin

Mandatory for all admin types

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Curriculum

- CCH Tagetik introduction
- CCH Tagetik architecture
- Data model
- Interface and navigation
- Dimensions
- Analytical Information Hub
- Data collection
- Process and business workflow
- Data collection (tools and forms)
- Multidimensional matrix
- Financial workspace
- Data entry forms
- Submission
- Reporting
- Multidimensional and dynamic forms
- Style
- SmartInsight

6 days

- Data modeling (1 day)
- Data collection (1 day)
- Output reporting (2 days)
- Financial modeling and reporting (1 day)
- Process governance & user rights (1 day)

System Admin

SPECIALIST

User management and advanced reporting

Curriculum

- User creation and configurations
- Data migration and utility tools
- Monitoring and auditing
- Advanced report design and optimization

3 days

- System admin (1 day)
- Advanced reporting (2 days)

PRO

Advanced data integration accross different processes

Curriculum

- Data integration with DTP
- Data integration with ETL
- Data integration via Restful API

3 days

- Data Integration (ETL) (1 day)
- Data integration with Restful API (1 day)
- Data integration with DTP (1 day)

CCH® Tagetik | **ACADEMY**

Master in Technical Expertise

Tech Admin

BUILDER

Mandatory for all admin types

Designed exclusively for Admins with the aim to cover the essentials of creating effective data models that serve as the backbone of CCH Tagetik business applications

Curriculum

- CCH Tagetik introduction
- CCH Tagetik architecture
- Data model
- Interface and navigation
- Dimensions
- Analytical Information Hub
- Data collection
- Process and business workflow
- Data collection (tools and forms)
- Multidimensional matrix
- Financial workspace
- Data entry forms
- Submission
- Reporting
- Multidimensional and dynamic forms
- Style
- SmartInsight

6 days

- Data modeling (1 day)
- Data collection (1 day)
- Output reporting (2 days)
- Financial modeling and reporting (1 day)
- Process governance & user rights (1 day)

Technical expertise (on-premise)

SPECIALIST

Infrastructure architecture, installation, configuration and troubleshooting

Curriculum

- Installation on Windows, WildFly/SQL Server
- Technical tools
- Server and client troubleshooting
- Issue management

4 days

- Tech standard ops (3 days)
- Technical troubleshooting (1 days)

PRO

Advanced functionalities on integration with external tools

Curriculum

- Authentication
- Qlick integration
- APIs
- Sizing and infrastructure
- Third part software

2 days

- Technical System design (1 day)
- Technical Advanced Operations (1 day)

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Master in Contributor

Contributor

Contributor

SPECIALIST	PRO
Contributors' standard actions in the business process (navigation and data entry)	*Basic data modeling and dimensionality and advanced reporting*

Curriculum

- Navigate reports
- Data entry
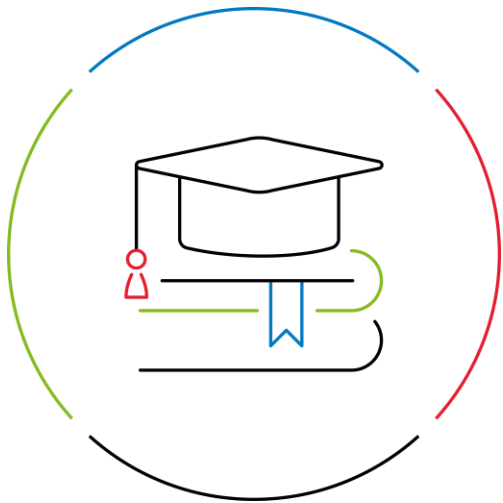- Run sub consolidation data processing

Curriculum

- CCH Tagetik architecture
- Data model
- Interface and navigation
- Dimensions
- Analytical
- Information Hub
- Reporting
- Multidimensional and dynamic forms
- Style
- SmartInsight

1 day

- End user Consolidation or Budgeting & Planning (1 day)

3 days

- Data modeling (1 day)
- Output reporting (2 days)
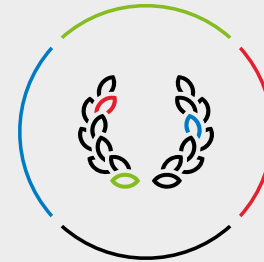
Frequently Asked Questions

Discovering Classes: How can I register for a class that interests me?

Discover a wealth of learning opportunities through our online classes, conveniently accessible from the comfort of your own space via our Academy homepage at https://www.wolterskluwer.com/en/solutions/cch-tagetik/services/academy. With just a few clicks, you can filter classes by location, language, day, and course type, streamlining your search for the perfect fit.

Upon finding your desired class, simply click "REGISTER" to begin the enrollment process. Should a class reach maximum capacity, fear not – you can still join the waiting list. In the event of an opening, you'll receive immediate notification.

It's important to note that attendance for CCH Tagetik classes is subject to approval. Our training experts will ensure that you meet the necessary criteria outlined in the registration form before confirming your participation. Upon approval, you'll receive an email containing all pertinent connection details.

For added convenience, a detailed guide is available directly on the webpage, providing comprehensive instructions every step of the way. Embark on your learning journey with ease and confidence through our accessible and informative online platform.

Content Updates: How frequently is the course content refreshed & updated?

Course updates depends on the maturity of the solution or process in CCH Tagetik and from the relevant new features coming up in each release. The minimum is once per year, the maximum (for new solutions) is quarterly. Each class will state the Tagetik SP it will be run on. Every certification assessment will be performed on the same version of the course.

Course Structure: Do I need to follow a specific order when taking the courses?

Yes, our learning paths are designed to guide you in deepening the knowledge of CCH Tagetik. In the Academy website the possible learning paths are highlighted and a recommended path is proposed. Then each class provides also a "knowledge pre-requisite" page explaining which classes should be followed first.

Customized Training Options: Can the courses be conducted at our company's location?

Depending on trainer and resources availability you can request an "on-demand" session at your location. In this case we will require a minimum number of people attending, and T&A cost will be added to the regular class fee.

Prerequisites of the Training: What are the prerequisites for the courses?

You will have 2 types of prerequisites:

- **Technical**: you will need to ensure all the technical requirements are satisfied (e.g. headset, high-quality internet connection, etc.)

- **Knowledge**: you will not be accepted in a class without the knowledge requirements. All our courses are built in building blocks and they leverage the knowledge of previous courses. So without that knowledge, the class will be not effective and the trainer will not be able to follow properly all other attendees.

Accessing Courses: Can I enroll in a course without being a CCH Tagetik user or customer?

To attend an Academy course you need to be a CCH Tagetik customer, partner or employee. This condition will be verified during the approval process performed at any registration.