
Training registration guide

How to reserve your seat

CCH® Tagetik | ACADEMY

This small document is designed to guide you in choosing and registering to an Academy training course. The registration process will take care of gathering all the relevant information about the attendee, the Company, the invoice process all in one place.

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How to register to a CCH® Tagetik Academy course

This small document is designed to guide you in choosing and registering to a CCH® Tagetik Academy training course.

The registration process will take care of gathering all the relevant information about the attendee, the Company, the invoice process all in one place.

Choose your Course

1. Visit <https://www.wolterskluwer.com/en/solutions/cch-tagetik/services/academy> and scroll down to display the Academy Worldwide Schedule.

Filters

Hide unavailable events

Search: Date Range Field:

Country: Event Type: Delivered by (Provider):

Delivered in (Language):



Self-paced Novice Onboarding - Benelux

The Self-paced Novice onboarding learning path offers the chance to gain knowledge on CCH Tagetik Basics and become a certified CCH Tagetik Novice by training at your own pace.

Please note that the *registration close date* is 7 days before the training session start date, if not already stated.

Audience: Implementers and Internal
Delivered by (Provider): Academy Benelux
Delivered in (Language): English

Remote
 Available



Self-paced Novice Onboarding - North America

The Self-paced Novice onboarding learning path offers the chance to gain knowledge on CCH Tagetik Basics and become a certified CCH Tagetik Novice by training at your own pace.

Please note that the *registration close date* is 7 days before the training session start date, if not already stated.

Audience: Implementers and Internal
Delivered by (Provider): Academy North America
Delivered in (Language): English

Remote (New York)
 Available



Self-paced Account Reconciliation

The Self-Paced Account Reconciliation offers the chance 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.

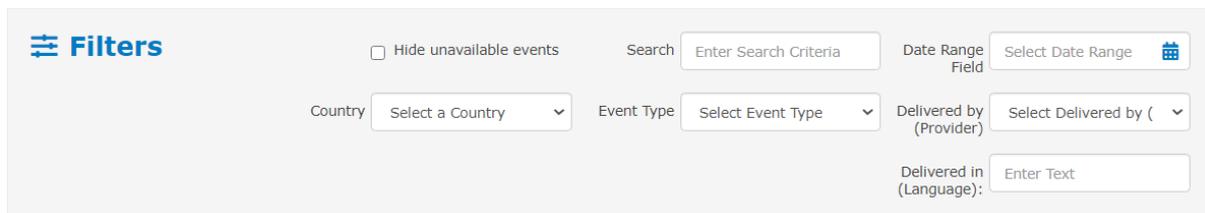
Please note that the *registration close date* is 7 days before the training course start date, if not already stated.

Delivered by (Provider): Corporate Academy
Delivered in (Language): English

Remote
 Available



2. Choose the training course you are looking for. You can ease your search using the Filters bar.



The screenshot shows a 'Filters' bar with the following elements:

- Filters** (header)
- Hide unavailable events
- Search: Enter Search Criteria
- Date Range Field: Select Date Range (with a calendar icon)
- Country: Select a Country (dropdown menu)
- Event Type: Select Event Type (dropdown menu)
- Delivered by (Provider): Select Delivered by (dropdown menu)
- Delivered in (Language): Enter Text (text input field)

3. You can filter on:
 - **Hide unavailable event:** Choose to hide training courses with no seats available;
 - **Event Type:** Choose Remote for online training / In-person for trainer-led courses that take place in a classroom setting;
 - **Country:** Select the area where the training should take place (for In-person training only);
 - **Date Range Field:** Select the period on which you would like to take part to a training;
 - **Delivered by (Provider):** Select the Provider (Legal Entity) that delivers the training course. This is the Legal Entity that will issue your invoice;
 - **Delivered in (Language):** Choose the language for your training;
 - **Search:** Free space to type the search criteria.
4. Each Training Event (course) includes a brief description of the program, information about the registration close date plus the event start/end date and time.
5. If the Course is the one your are looking for, simply click on the **Register** button to access the Registration Form.



Fill the Registration Form

1. The registration form includes several tabs, each focused on one aspect of the registration.



ETL Foundation

2. **Welcome:** This page is only a welcome page visible if:
 - you click on BACK on the new registration page (see later)
 - you have been provided with a direct link to the registration (instead of selecting one from our website). This can happen for instance in private training events. To continue from here, click on the NEW REGISTRATION button.

New Registration

3. **Welcome - New Registration Page:** Once you hit the new registration button, the Welcome page will change and the actual registration will begin. The top section displays general information about the training as the prerequisites required to attend the training course. The bottom one displays the very first information required to start your registration:
 - **Attendee Business Email:** The person attending the training course;
 - **Registrant Business Email:** The person filling and signing the registration form (it could differ from the Attendee. If not, type the same email address of the Attendee);
 - **Customer Representative Business Email:** The person authorizing the payment and the attendance. This person will receive the invoice
 - **Voucher Code:** here you can insert a **Voucher code**, if applicable. This code is used for managing special agreements such as training packages. If you don't have a voucher code, leave this field blank.
 - **Attendee Category:** Before clicking on continue, you must select the category you belong to. You can choose from:
 - **Partners:** this is reserved to Business Partner, Implementers and Resellers



- **Customers:** this is reserved to all our Customers
- **Internal:** this is reserved only to CCH® Tagetik Employees

⚠ Important: Upon registration approval, the Category will be evaluated together with all other information. If you are not sure about your category, please click on the correspondent [More info] link.



Note: Please note that fields marked with * are mandatory;

* = Required Field

Attendee business email*
 Business email address of the person attending the training course

Confirm attendee business email*

Registrant business email*
 Business email address of whom is filling and signing this form on behalf of customer

Customer Representative business email*
 Business email address of the person who authorizes the payment and will receive the invoice

Invoice business email*
 Business email address to which the invoice must be sent

Voucher Code
 If applicable

Please select from the following options: *

Partners €500.00 [More Info]
 Customers €500.00 [More Info]
 Internal [More Info]

Total Cost €500.00

4. **Attendee Information.** This page is divided into 3 smaller pages, all very important.

Attendee information	Prerequisites	Terms & Conditions
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- **Attendee Information:** You will be asked to insert your Personal information, your Company information (mandatory for the correct invoice issue) and, for in-person classes, your Dietary need. **All this information will be protected by your local Privacy Policy;**
- **Prerequisites:** you will be asked to read, verify and confirm that you possess all the prerequisites' necessary to enroll. If you have any doubt, you can contact your local Training Manager;
- **Terms & Conditions:** Finally, you will be asked to review and accept (with check-boxes) the training Terms & Conditions. The T&C file can be also downloaded.

5. **Agenda.** This page displays a brief recap of the training session (or sessions if more are available). By clicking on the trainer name, you will have the chance to see your trainer photo and bio.
6. **Additional Attendees.** If you wish to register 2 or more people to the same class, you can make a group registration simply selecting YES to the question shown below. This will trigger a new registration, so the system will ask the same information of all attendees, (as the acceptance of T&Cs for each of them) but the payment will be done only at the end, with the total amount of all registrants.

Please select "yes" if you would like to register another person for this training.

* = Required Field

Will you be registering any other attendees for this event?*

Yes No

Back

Continue

7. **Payment Page.** On this page, you can select the payment method by choosing from those available. The payment conditions are enclosed in the T&Cs.
 - The billing information section is filled automatically with the information already added in the Company section, at the beginning of the registration. You can, of course, change your data but remember that any missing billing information might delay your approval to the class.
 - Please note that, invoice payment is the only available method, by now.
 - The very last step, will be to click on **Finalize Registration** button to complete the registration.



⚠ Important: this page is not displayed in case the Fee = 0, for instance, for new CCH® Tagetik hires.

[Finalize Registration](#)

8. **Registration Record** . This page will display a summary for the whole registration. If you wish to print this page for future reference, you can use the print option on your browser.

⚠ Important: Please remind that the registration to a class is subject to **CCH Tagetik approval**. The next section of this guide will explain it in details.



Receive the Registration emails

1. **Registration Creation Email.** Once your registration is completed, the system will send an automatic email to confirm your request.
 - **Mind that this email is sent automatically ONLY to the Attendee** at the end of the registration.
 - If you registered someone else (for example a Manager enrolling a consultant, or an HR manager enrolling a user) we suggest to print out the summary registration as reference.

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Registration Creation

- The Registration Creation email contains:
 - **Privacy Policy:** To be downloaded and reviewed.
 - **Reference Number:** the attendee registration code needed to access your registration and make changes or cancel it.
 - **Registration link:** From here, you can access the registration by using your Reference Number.
2. **Registration Approved Email.** This is the most important email: it is sent to the Attendee upon **our approval** of their enrollment to a class.





Registration Approved

- This email contains:
 - **Calendar invitation:** you can download and include the session in your calendar
 - **Strigo Connection test :** Please check your system's connectivity and media devices as soon as possible (no later than 2 business days), otherwise you won't have the time to fix any possible issues.
 - **Strigo Troubleshooting guide:** a brief troubleshooting guide on Strigo training infrastructure. To maximize your value during the course, we recommend you to read it before the event;
 - **Reference Number and Registration link:** to modify/cancel the registration;
 - **Information about the training.**

3. **Registration Rejected Email.** In the unfortunate case in which your registration is rejected, you will receive this email.

- This can happen **if you don't have the prerequisites** required to attend the class (for instance you registered for a Consolidation course, but you haven't followed the Data Collection course first).
- Another reason for rejection could be that **you don't currently have a contract with CCH® Tagetik** (as a Partner or Customer). In this case you can refer to your local CCH® Tagetik representative to clarify your



position.

- So what to do next? This email includes your local Provider email address that can be reached for more information.

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Registration Rejected

4. **Other Emails** . Attendee might receive other specific emails for various reasons:
 - **Incomplete Registration:** You can start over the registration if it was not successfully completed;
 - **Attendance Diploma:** You can receive your attendance Diploma (only if applicable);
 - **Event Cancellation:** In the unfortunate case of an event cancellation;
 - **Event Update:** In case the event has been modified, for example a different hour or date;
 - **Registration modification :** To confirm that your changes were successfully saved.

Cancel or modify your registration

1. The registration modification or cancellation it is only allowed **until 7 days before the training course start date, as per T&Cs.**
2. To cancel or modify your registration, go to the Registration Creation or Approved email:
3. Find the registration link and the Reference Number:



If you wish to modify, cancel or simply view your registration, please click [here](#) and use your Reference Number: 219280294.

4. Click on the link and you will be redirected to the access page:

Please insert your email address and your reference number below to modify your registration.

* = Required Field

Attendee business email*

Reference Number*

Forgotten your Reference Number? [Click here to be emailed a reminder](#)

5. **Enter the email address used to register** and the **Reference Number**;
6. Once you are in, the system allows you to move from one page to another of the registration form for changing your information or to cancel your registration.
7. In the end, if you changed the information you will receive the Registration modification email to confirm that your changes were successfully saved; if you cancelled your registration, the system will delete your data and give you the warning directly on that page.

