CCH® Tagetik

Datasheet

Intelligent Disclosure

Report with clarity. Publish with confidence.

The question finance is being asked has changed — and reporting no longer ends at the close. Financial, ESG, tax and sustainability content has to reach boards, investors and regulators faster than ever, and to more stakeholders. Yet the last mile is still manual: numbers are approved and governed in the platform, then exported, copy/pasted, reformatted and re-checked by hand — where one late adjustment leaves the system correct and the document wrong.

CCH Tagetik Intelligent Disclosure extends the unified finance platform all the way to the published output. Built natively into Microsoft 365 and reaching into Adobe InDesign and iXBRL filing, it keeps numbers and narratives linked to source data while teams co-author in real time. Expert AI, with a Finance Brain™, works inside the document to validate consistency and accelerate tagging — so disclosure runs on the same governed foundation as close and planning.

Trusted foundation for disclosure, powered by Expert AI

Numbers & narrative, linked

Every figure, table, and chart in a document or presentation stays linked to governed CCH Tagetik data. When a number changes at source it updates in the report, so the last-minute adjustment that used to break the board deck no longer does — and finance stops re-checking by hand.

Result: Eliminate up to 90% of manual reporting errors.

Validation before publication

AI-powered validations run inside Word as content is written, flagging inconsistencies between narrative and data before anyone reviews. Expert AI, with a Finance Brain™, extends this to full-report review, so mismatches are caught while the document is being built, not discovered at sign-off.

Result: Accelerate report generation and validation by up to 70%.

Collaboration without hand-offs

Finance, tax, ESG, and investor relations co-author in real time in Microsoft 365, in the tools they already use. Threaded comments and version control replace emailed drafts, so contributors work in parallel on one document instead of merging conflicting copies at the end.

Result: Cut reporting cycle time by up to 40%.

One foundation, every output

Board presentations in PowerPoint, annual reports designed in Adobe InDesign, and regulatory filings in iXBRL all draw on the same governed data as the close and the plan. One set of numbers flows to every final output, so the story stays consistent across formats and audiences without re-keying.

Result: 100% consistency across every published output.

Filing-ready from the start

XBRL and iXBRL tagging is powered by an integration with CoreFiling, the industry-leading provider, covering local and global taxonomies. Tagging begins at the start of document preparation, AI-assisted suggestions cut manual effort, and tags roll forward across cycles.

Result: 50% less effort preparing the annual iXBRL filing.

No learning curve

Teams work in Word, Excel, and PowerPoint, so there is no new interface to learn. Certified by Microsoft and available in the Microsoft Marketplace, deployment takes seconds rather than an IT project — and existing Collaborative Office customers migrate automatically, with no rebuild.

Result: 85% of Collaborative Office content migrates automatically.

*"The biggest shift for us during our tests with the new Intelligent Disclosure PPT solution was **moving from rebuilding reports to refreshing reports**.*

*Thanks to the automated table and graph population prompted by a simple change in the scenario/period parameterization, **reporting updates are fast and consistent – with reliable and traceable data** flowing directly from our CCH Tagetik database into our reporting templates."*

- KELVION

*"Switching to CCH Tagetik Intelligent Disclosure has opened new possibilities for us. **Collaboration is now simpler** with MS Office 365 integration, **allowing us to work together in real-time and pull from all databases**."*

- DE GOUDSE



Why CCH Tagetik

- Buit for Finance, in the tools finance uses
- Regulatory intelligence embedded in every workflow
- One source of truth from close to disclosure

Key capabilities

Create with confidence

- **Word, Excel & PowerPoint Add-ins:** Author narrative and financial content in Microsoft 365, with vetted numbers, tables, and charts inserted directly from CCH Tagetik.
- **Data-linked documents & presentations:** Every figure, table, and chart keeps a live connection to its source, so reports are updated rather than rebuilt each cycle.
- **Real-time co-authoring:** Finance, tax, ESG, and Investor Relations contribute to the same document simultaneously, with threaded comments in place of emailed drafts.
- **+300 data sources:** Consolidate financial and non-financial data from across the business once, then reuse it across every report and every period.
- **AI-supported narrative drafting:** Draft and refine narrative on top of governed numbers, so the commentary and the data never drift apart.
- **Roll-forward reporting:** Carry documents, validation rules, and structures into the next cycle, so each period starts from the last rather than from scratch.

Publish with control

- **AI-powered validations:** Checks run inside Word as content is written, flagging inconsistencies between narrative and data before review begins.
- **Consistency Controller agent:** Expert AI extends validation to a full-report review, catching mismatches across the whole document before publication.
- **Governed approval workflow:** Track documents through submission, review, approval, and rejection, with threaded comments, automatic email notifications, and automatic version history at every step.
- **Full lineage & audit trail:** Trace any published figure back to its source, so an auditor can be walked from the report to the trial balance in one system.
- **XBRL and iXBRL via CoreFiling:** Local and global taxonomies through an integration with CoreFiling , the industry-leading provider, with AI-assisted tagging and tags that roll forward each year.
- **Responsible AI, governed by Wolters Kluwer:** Models are approved through Wolters Kluwer AI governance and are never trained on customer data.

Open by design

- **One governed model:** Disclosure runs on the same foundation as close and consolidation — no separate reporting database, no reconciliation between systems.
- **Adobe InDesign integration:** Design teams build the investor-ready report in InDesign while content stays connected to trusted CCH Tagetik data.
- **Microsoft-certified & Marketplace-ready:** Certified by Microsoft and deployable from the Marketplace, so users are running in seconds without manual rollout.
- **Automatic migration:** Collaborative Office customers migrate in two clicks, with the majority of existing content carried over automatically.
- **Multiple output formats:** Publish to PDF, HTML, Word, PowerPoint, InDesign, and XBRL/iXBRL from one governed set of content.
- **Open API ecosystem:** Connect to any ERP, source system, or output tool through open APIs, so nothing else in your IT landscape needs to change.

About Wolters Kluwer

Wolters Kluwer (EURONEXT: WKL) is a global leader in professional information, software solutions, and services for the healthcare, tax and accounting, financial and corporate compliance, legal and regulatory , and corporate performance and ESG sectors. We help our customers make critical decisions every day by providing expert solutions that combine deep domain knowledge with specialized technology and services. Wolters Kluwer reported 2022 annual revenues of €5.5 billion. The group serves customers in over 180 countries, maintains operations in over 40 countries, and employs approximately 20,000 people worldwide. The company is headquartered in Alphen aan den Rijn, the Netherlands.

For more information, visit **www.wolterskluwer.com**, follow us on **LinkedIn**, **Facebook**, and **YouTube**.

Visit CCH® Tagetik website

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by Wolters Kluwer