
Consultants Training Catalogue

Consolidation Champion

CCH® Tagetik | ACADEMY

To become a certified CCH Tagetik Consolidation Champion, you must complete the Consolidation Learning Path. The journey consists of different milestones, each complete with a set of courses that you must attend and pass, before moving onto the next milestone.

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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 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.
- 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).



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



Overview of the Certification journey for Consultants

Our certification structure relies on 2 main concepts: **Platform** and **Solution**.

Below you will find information about the goals, structure and milestones dedicated to Consultants.

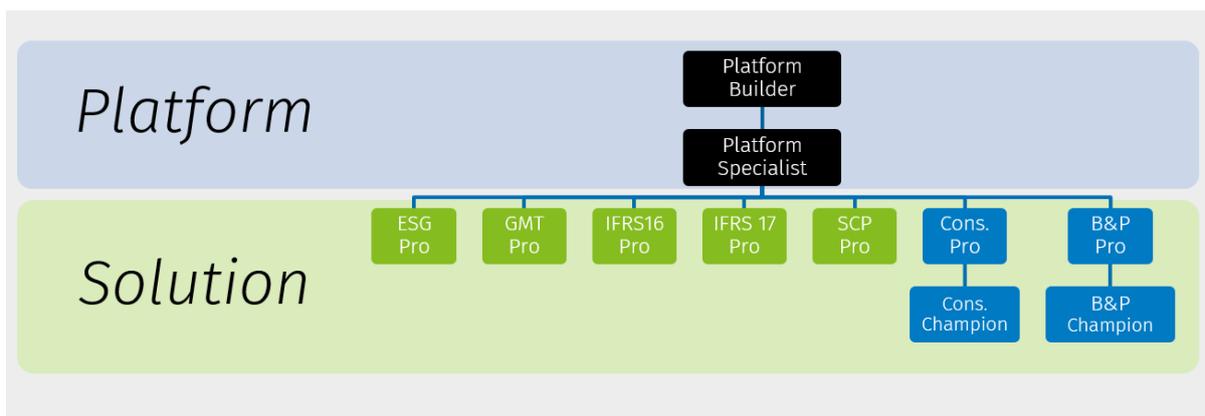
PLATFORM EXPERTISE

- Contains all the knowledge that represents the **foundation** of CCH® Tagetik knowledge
- All the courses in this area include features and functions shared with all the different processes/solutions

SOLUTION EXPERTISE

- At this level we analyze and discuss topics that are domain-specific
- The **platform expertise** is a pre-requisite to step in at this level, but all that knowledge will be enriched by specific setups and features that have been designed for a specific area/solution/vertical
- The "breadth" of solution expertise may vary according to the complexity of the domain (Consolidation, Supply Chain Planning, ESG, IFRS17) but also according to the CCH® Tagetik approach to the domain. For these reasons some domain might reach the CHAMPION level, others will stop at the PRO level

The image below shows the complementary structure of the certification path, highlighting that platform expertise provides common knowledge relevant for all solutions.



The certification path, and the related milestones, are naturally derived by this approach. Every milestone is composed by a variable number of courses in a mixed approach (ILT + Self-paced). To achieve a milestone you will have to pass all the online assessments associated with the milestone content. Here are the details of the different levels:

1. **PLATFORM BUILDER**

- Familiarization with software concepts and fully work with common functionalities.
- A Platform Builder can perform basic tasks in projects - data loading, data model setup, form design - under the supervision of senior people

2. **PLATFORM SPECIALIST**

- Comprehensive knowledge of tools that are not process specific, foundations for any verticals.
- A Platform Specialist can perform advanced tasks, focusing on Reporting, System administration and Data Integration
- Technical learning path will have a specific "Technical Specialist" level (smaller version of the full specialist)

3. **"SOLUTION" PRO**

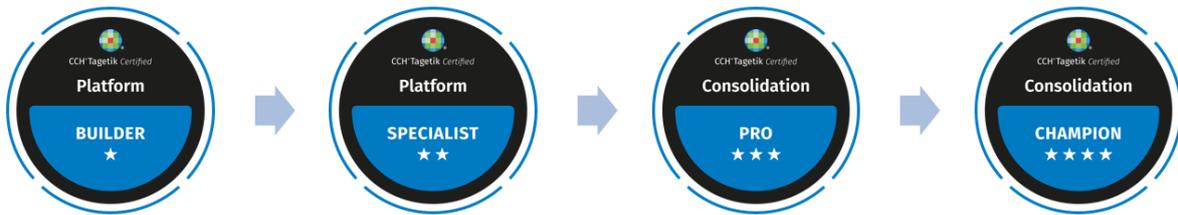
- Each solution has its own dedicated branch (Consolidation, BP&F, Supply Chain Planning, ESG, etc.)
- This milestone provides specialization within vertical domains and solutions for specific business contexts.
- A Solution Pro knows the peculiarities of a specific business process, and is able to choose and setup the relevant calculation rules to satisfy the Customer's Requirements

4. **"SOLUTION" CHAMPION**

- Each solution has its own dedicated branch. Not all branches has a Champion level
- Full supervision of a business process and ability to design and implement advanced solutions and best practices.
- A Solution Champion is the solution Architect that ensures the success of a Project. They drive the application blueprint that will be used by the Pros, Specialists and Builders involved in the project.



Consolidation Learning Path



To become a certified CCH Tagetik Consolidation Champion, you must complete the whole Learning Path. The journey consists of four milestones, each complete with a set of courses that you must attend and certification tests to pass, before moving onto the next milestone. For detailed information, have a look at each course page.

Platform Builder

- Data Modeling
- Output Reporting
- Data Collection
- Financial Modeling and Reporting
- **Platform Builder Online Certification:** you can ask access to single assessment (one per course) or do all of them at once, at your own pace.

Platform Specialist

- System administration
- Process governance and user rights
- Data integration with RESTful API
- Data integration with DTP
- Data integration with ETL
- Advanced Reporting
- **Platform Specialist Online Certification:** you can ask access to single assessment (one per course) or do all of them at once, at your own pace.



Consolidation Pro

- Consolidation
- Collaborative Office
- Consolidation Advanced
- Consolidation Pro Online certification: you can ask access to single assessment (one per course) or do all of them at once, at your own pace

Consolidation Champion

- **Champion Week/Exam:** This 4 days event will include a two day exam, will test the attendee's capability to face the most common challenges in a CCH® Tagetik project.
- Passing the Champion Exam will certify that you are a Consolidation Champion



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" on page 1](#))



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" on page 1](#))



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" on page 1](#))



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" on page 1](#))



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



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



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)



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



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



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



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



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



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.



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,...)



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.

