

CCH[®] Tagetik | ACADEMY



Academy Course Catalogue Implementers

When you have to be right

Software version: 5.3.SP18

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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.

Learning Paths

We designed recommended Learning Path 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 Product Novice, Expert, Pro or Champion. These learning path can focus on Consolidation, Budgeting & Planning or Technical Knowledge.

After the learning path, you will find detailed information for each Course.

Course Delivery

All Academy 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.

All training courses are based on CCH® Tagetik 5.3 and include the following training material:

- Workshop guide with tips&tricks
- Interactive e-learning to review topics or see additional examples (for selected courses)
- Quick Reference cards.

The minimum number of attendees for a training course is specified on each specific class.

Course Registration

All our 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. Courses can be held at Tagetik offices or on-site at the customer location.



Planning Learning Path



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

Novice

- **Data Model:** standard class
- **Output Reporting:** standard class
- **Data Collection:** standard class
- **On-line Test:** final self assessment for Product Novice

Expert

- **Budgeting & Planning:** standard class
- **AIH Basics:** standard class
- **System Administration:** standard class
- **ETL Foundations:** Standard class
- **On-line Test:** final self assessment for Product Expert

Pro

- **Budget PRO:** Standard class
- **AIH PRO:** Standard class
- **On-line Test:** final self assessment for Product Pro

Champion

- **Solution Architect:** This training course covers the fundamentals to enable attendees to design a CCH Tagetik application. This design class contains both Planning and Consolidation business cases.
- **Champion Exam:** This 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 Planning Champion



Consolidation Learning Path



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

Novice

- **Data Model:** standard class
- **Output Reporting:** standard class
- **Data Collection:** standard class
- **On-line Test:** final self assessment for Product Novice

Expert

- **Consolidation:** standard class
- **Collaborative Office:** standard class
- **System Administration:** standard class
- **ETL Foundations:** Standard class
- **On-line Test:** final self assessment for Product Expert

Pro

- **Consolidation PRO:** Standard class
- **AIH Basics:** Standard class
- **On-line Test:** final self assessment for Product Pro

Champion

- **Solution Architect:** This training course covers the fundamentals to enable attendees to design a CCH Tagetik application. This design class contains both Planning and Consolidation business cases.
- **Champion Exam:** This 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



Technical Learning Path



To become a certified CCH Tagetik Technical Champion, you must complete the Technical Learning Path. The journey consists of 3 milestones, each complete with a set of courses that you must attend and pass, before moving onto the next milestone. For detailed information, have a look at each course page.

Novice

- **Data Model:** standard class (course or e-learning)
- **Output Reporting:** standard class (course or e-learning)
- **Data Collection:** standard class (course or e-learning)
- **On-line Test:** final self assessment for Technical Novice

Expert

- **System Administration:** standard class
- **ETL Foundations:** standard class
- **Technical Standard Operations:** standard class
- **Technical Troubleshooting:** standard class
- **On-line Test:** final self assessment for Technical Expert

Champion

- **Technical System Design:** standard class
- **Technical Advanced Operations:** standard class
- **Champion Exam:** This one 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 Technical Champion



Overview Training

Duration: 1 day

Audience: Project team members

Prerequisites: None

Objectives: The Overview Training course will provide attendees with the basic knowledge of CCH® Tagetik. The aim is to provide all involved team members, in a project, with the minimum skills necessary to cooperate efficiently. In addition another goal is to ensure that a high quality analysis phase takes place at the beginning of the project to create the conditions for an effective and productive project team awareness.

Topics:

1. Software architecture.
2. Dimensions.
3. Software interfaces.
4. Available methods for loading and processing Data.
5. High-level description of Reporting tool:
 - a. Main concepts of Forms design.
 - b. Navigation and Data Entry modes.
6. How Tagetik approaches the business processes.
7. General Tips & Techniques and Best Practices.



Upgrade to HTML 5

Duration: 1 day

Audience: Administrators and Implementers

Prerequisites: Experience with previous CCH Tagetik versions

Objectives: This training course is aimed at Administrators/Implementers, who are currently using or implementing a previous CCH Tagetik version (CCH Tagetik 4) and are wishing to upgrade to the 5 version, or for those who are currently using CCH Tagetik 5 but are still with the FLEX interface. Attendees are expected to understand and know the basics of CCH Tagetik database administration and reporting. The course focuses on the main innovations introduced within the HTML5 interface and other functions, leading to an improved user experience.

Topics:

1. Navigating through the HTML5 interface
2. Customizing your home page
3. Using the Process cockpit
4. Data model setup and maintenance
5. Process definition (including business workflow)
6. New functionalities in HTML5
7. Next steps

Additional info: Available also as Virtual Classroom Training (VCT).



Data model

Duration: 1 day

Audience: Administrators and Implementers

Prerequisites: None

Objectives: This training course covers the basics of system dimensionality: data model definition and maintenance, aggregation structures and relevant information for each dimension.

Topics:

1. CCH® Tagetik architecture
2. Familiarization
3. Aggregation Structures
4. Interface navigation
5. Data model design
 - a. Periods
 - b. Scenarios
 - c. Categories
 - d. Accounts
 - e. Entities
 - f. Custom dimensions

Additional info:

- Interactive E-learning as additional asset included



Output Reporting

Duration: 2 days

Audience: Administrators, Power user and Implementers

Prerequisites: Data Model course & basic knowledge of MS Excel functionalities

Objectives: This training course explains how to design reports, using CCH® Tagetikreporting features.

Topics:

1. CCH® Tagetik Reporting introduction
2. Excel Client overview
3. Usage of a Form (Design, Navigation and Data Entry)
4. Parametric Forms
5. Basic dynamic forms
6. Smart Insight
7. Formatting best practice
8. Maintenance best practice
9. Basic usage of CCH® Tagetik style
10. Tips & Tricks

Additional info:

- Interactive E-learning as additional asset included



Data Collection

Duration: 1 day

Audience: Administrators and Implementers

Prerequisites: Data Model and Output Reporting

Objectives: This training course covers the basics of the application process setup and the main features for collecting data.

Topics:

1. Usage of a Process cockpit
2. Application process design
 - a. Business workflow setup
 - b. Application process setup
3. Data collection
 - a. Data entry form design and usage
 - b. Predefined ETL usage
 - c. Custom ETL usage
 - d. Quick Data Loader usage
 - e. Journal creation
 - f. Data processing overview

Additional info:

- Interactive E-learning as additional asset included



Consolidation

Duration: 2 days

Audience: Administrators, Implementers and Consolidators

Prerequisites: Data Model, Output Reporting and Data Collection. Basic knowledge of Financial Consolidation is recommended.

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



Budgeting and Planning

Duration: 2 days

Audience: Administrator, Implementers IT Professional

Prerequisites: Data Model, Output Reporting, Data Collection, Database file management, basic SQL Scripting Language (recommended)

Objectives: This training course covers the skills necessary to follow the full budgeting process: from data loading to customization of specific calculation logics through the implementation of advanced calculations (MDX-like). The course will also provide the ability to implement Profitability model leveraging the CCH® Tagetik built-in Allocation Engine. In addition, all skills necessary to create advanced and powerful Excel forms are included.

Topics:

1. Budgeting Process setup
2. Spreading tools
3. Asset Depreciation tool
4. Allocation engine
5. Calculation logics
6. Copy tools
7. Editable category pool



Collaborative Office

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



Analytic Information Hub Basics

Duration: 2 days

Audience: Administrators, IT Professional and Implementers

Prerequisites: Data model, Output reporting, Database file management, SQL Scripting Language (recommended)

Objectives: This training course covers the skills necessary to implement an analytical solution using the Analytical Information Hub that extends beyond the standard data model. Attendees will be taught the difference between the Financial and Analytical Workspaces, how to create analytical dimensions and different types of Datasets including standard, virtual and reference datasets. The course will provide the ability to configure the AIH calculation engine, called Data Transformation Package, and the use of data integration tools within the business workflow. Furthermore, attendees will learn how to use the reporting capabilities with the analytical workspace datasets.

Topics:

1. Analytical Workspace and Financial Workspace
2. Analytical Dimensions and Datasets
3. Data Transformation Package
4. Data integration tools (QDL, Datasource Mapping)
5. Analytical Workspace on reporting side
6. Virtual Datasets
7. Import/Export



Analytic Information Hub Pro

Duration: 2 days

Audience: Administrators, IT Professional, Implementers with advanced Product knowledge.

Prerequisites: AIH basic training, expertise in use of AIH, SQL Scripting Language.

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. In the hands-on workshop all advanced configurations of datasets and DTP will be reviewed.

Topics:

1. General overview and specific consideration of design
2. Technical design guidelines
3. Solution design workshop and discussion
4. Datasource mapping
5. AIH tables and Dictionary use
6. Advanced use of Virtual Datasets
7. AIH Parameters
8. Special methods
9. DTP filtering methods
10. Reference dataset level type
11. Grouping function
12. Cell field on reporting
13. Drill-through to analytical detail



Predictive Intelligence Basic


Duration: 1 day

Audience: Administrators, Implementers.

Prerequisites: Novice Certification, Analytical Information Hub Basic and Analytical Information Hub Pro
OR

Novice Certification, Analytical Information Hub Basic and Knowledge of Datasources and Parameters on Analytical Information Hub.

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



Consolidation Pro

Duration: 2 days

Audience: Implementers

Prerequisites: Consolidation Expert courses (Data Model, Output Reporting and Data Collection, Consolidation, ETL)

Recommended: Project experience on Statutory Consolidation projects, practical experience with all the topics covered in the Basic Consolidation course

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



Budget Pro

Duration: 2 days

Audience: Administrators, Implementers and Consolidators

Prerequisites: Planning Expert courses (Data Model, Output Reporting and Data Collection, Budgeting & Planning, AIH Basics, ETL)

Recommended: Project experience on Planning projects, good experience with MDX scripting and Report design.

Objectives: This training course focuses on advanced design and optimization of the most common calculation tools used in Planning & Budgeting projects. In particular the focus is on advanced settings (reporting and Allocation) or boosting performances (MDX scripting and Form design).

Topics:

1. MDX Optimization
 - a. How to write a "clear" MDX
 - b. Common performance pitfalls
 - c. Dimensional matching
 - d. Time movements
2. Implementation Best practices
3. Allocation engine
 - a. Allocation vs other calculation Tools
 - b. Advanced options
4. Advanced Reporting
 - a. Data processing from form
 - b. Implementing "tricky" Data Entry Form
 - c. Advanced selection practical cases



Solvency II

Duration: 1 day

Audience: Administrators

Prerequisites: Data Model

Objectives: The CCH® Tagetik Solvency II training course will provide attendees with the knowledge of how to navigate within the CCH® Tagetik Solvency II Pre-Package Solution (PPS). Another goal is to learn how to extend the data model of the Solvency II template with customer specific information, such as entities and the organization hierarchy.

Topics:

1. Implementation scenarios for CCH® Tagetik Solvency II
2. Project approach, resourcing and attention points
3. Introduction CCH® Tagetik Solvency II PPS
4. QRT analysis
5. Data delivery methods
6. Data model additions (based on best practice)
7. Consolidation (solo vs. group)
8. Other (local) reporting requirements: Nationale Staten, ZIN (if applicable)



Lease Accounting Solution (IFRS 16 & ASC842)

Duration: 2 days

Audience: Administrators and/or key users and project team members, Implementers

Prerequisites: Basic knowledge of lease accounting regulation (IFRS16 & ASC842); Data Model and Output Reporting courses.

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® Tagetikterminology, 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



Account Reconciliation

Duration: 2 days

Audience: Administrator and Implementers

Prerequisites: Data Model, Output Reporting, Data Collection, ETL and 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. The Solution
 - a. End User point of view
 - b. Administrator/Implementer point of view
3. What's new?



IFRS 17 Basic

Duration: 2 days

Audience: Implementers and Implementer Partners (currently working on projects or with prior authorization)

Prerequisites: Data Model, Output Reporting, Data Collection, ETL Foundation, AIH Basic. 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



IFRS 17 Pro

Duration: 2 days

Audience: Implementers and Implementer Partners (currently working on projects or with prior authorization)

Prerequisites: IFRS17 Basic, AIH PRO. 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 its 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 off-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. Hand on workshop



ETL Foundation

Duration: 1 day

Audience: Administrators, Data integration specialists and Implementers

Prerequisites: Data Model (mandatory), Output Reporting & Data Collection (recommended) training, SQL programming language, understanding of ETL concept & processes.

Objectives: This training covers the basics of the CCH® Tagetik ETL module configuration and provides best practices. The attendees will configure an ETL with mapping functionality that can load financial data for a Tagetik implementation. With this knowledge you can also update existing ETL's with new functionality according to 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



Data Integration

Duration: 1 day

Audience: Administrators, AIH specialists and Implementers

Prerequisites: Data Model (mandatory), Output Reporting & Data Collection (recommended) training, AIH Basics (mandatory), understanding of ETL concept.

Objectives: This training teaches how to setup and use the RESTful API in CCH® Tagetik. With the concepts explained, the attendees will learn how to expose and consume data and metadata within AIH via RESTful API. As well the training will provide information on performances, typical OData connections and the available types of authentication.

Topics:

1. Data flow in CCH Tagetik
2. RESTful API in CCH Tagetik
3. How to configure CCH Tagetik to use RESTful API
4. Consuming and exposing via OData
5. Expose metadata and Analytical dimensions
6. Data Target
7. AIH components and OData service
8. Performances
9. Available authentication and OData typical connections
10. Audit data processing exposed via OData
11. Running MDM, Import/Export AW, Import/Export Repository, DTP and Data Source mapping via RESTful API



Functional Application Management

Duration: 1 day

Audience: Administrators and Implementers

Prerequisites : Data Model

Objectives: the Functional Application Management (FAM) course will give anybody who has an Administrator role the necessary skills to maintain the CCH® Tagetik application. During the course students will learn to get an application ready for the coming year. But also learn how to adjust the application in case of mergers, acquisitions, new accounts, new products or any other changes in the datamodel. In most companies changes to the datamodel will occur on regular basis. It's important that administrators are aware of the implications of these changes and when they need to run a deployment. This course aims to make Companies less dependent of their CCH Tagetik Implementation partner

Topics:

1. Maintain datamodel
2. Maintain workflow & process
3. Maintain consolidation
4. Other application management tools



End User Basics - Consolidation

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:

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



End User Basics - Budgeting & Planning

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:

- How to run a report via web
- How to collect Forecast 2 data
- How to collect Multiyear plan data
- How to collect Budget data



System Administration

Duration: 1 day

Audience: Implementers, Administrators

Prerequisites: 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



Technical Overview training

Duration: 1 day

Audience: IT Professional, Help Desk and Implementers

Prerequisites

- Knowledge of MS Office Excel, Word and PowerPoint usage and configuration
- General experience with Windows, Mac, or Linux-based computers

Objectives: The CCH® Tagetik Technical Overview course will provide attendees with the basic introduction to Tagetik applications from a technical perspective including an overview of the application architecture and the additional components that make up the CCH® Tagetik family of products. The course will also discuss basic maintenance, upgrading, and troubleshooting. The goal of this course is to provide anyone with minimal or no background in CCH® Tagetik and with any level of technical skills with the understanding of the technical architecture of CCH® Tagetik.

Topics:

1. Introduction to Core CCH® Tagetik Application Architecture and infrastructure
2. Important Aspects of Resource Estimation
3. Overview of Installation/Upgrade of the Application and Add-in
4. Introduction to Additional Tagetik Components and Integrations
5. Introduction to Basic Maintenance, Operations, and Troubleshooting



Technical Standard Operations

Duration: 3 days

Audience: Technical Consultants, IT professionals

Prerequisites

- Knowledge of Data Model, Output Reporting, Data Collection, System Administration, and ETL Foundations via Academy course participation or virtual materials.
- 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.

Objectives. The Technical Standard Operations Course (TSO) will provide participants with an in-depth and hands-on look at the application and infrastructure architecture, installation procedures and configuration. Through exercises students will learn the application technical architecture and the basics of installing, configuring, and maintaining the CCH Tagetik application. Both technical details and practical hands-on experience will be provided. 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 & Application System Properties and Configuration
8. SALES, PRESALES Technical Services such as sizing and compatibility



Technical Troubleshooting

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



Technical System Design

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



Technical Advanced Operations

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



Customized End-user Training (if applicable)

CCH® Tagetik don't usually provide STANDARD training for End Users. They are usually trained on customer's application by project team members.

The Academy offers the possibility to develop a Customized End-user Training.

Duration: to be determined based on training design session

Prices: Prices and timing to be discussed with the implementation team. Customized End-user training is quoted as a separate project, on a T&M approach.

Audience: End-Users

Prerequisites: none

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.)

IMPORTANT: Customized End-user training courses are developed on-demand for a specific Customer. Prices, availability, timing and other details should be discussed with your training representative. Please mind that this service might not be available in every region.



Solution Architect

Duration: 2 days

Audience: Implementers with advanced Product knowledge

Prerequisites: "Product Pro" Milestone or a background of at least 5 projects (either on Planning or Consolidation)

Objectives: This training course covers the fundamentals to enable attendees to design a CCH® Tagetik application. After introducing some of the main drivers to consider when designing a solution and discussing a business case, 4 workshops will allow the attendees to learn how to convert customer requirements into an effective design (# of applications, Data-model, Process workflow), discussing with the trainer and the class pro and cons of the design decisions.

Topics

For every business case analyzed, the focus will be on:

1. Data model choices pro and cons
2. Number of Application and impact on implementation
3. Process Design / Workflow (if applicable)
4. Peculiarities of the specific sect (if applicable)



Champion Exam - Planning

Duration: 2 days

Audience: Implementers with Product and Solution Design knowledge

Eligibility: Planning "Pro" certification and Solution Design Class

Exam Description: This two days exam, divided into 4 workshops, will test:

- Attendee's capability to face the most common challenges in a CCH® Tagetik project.
- Attendee's knowledge of the full Financial Performance Platform.

IN SCOPE Topics

1. Understanding the business requirements and providing a Solution Design
2. Hands-on:
 - a. Data-model
 - b. Process and Workflows
 - c. Data Entry & Reporting
 - d. Reporting
 - e. Calculation tools (such as MD Scripting, Allocation, Asset Depreciation, Forecast model, DTP,...)

OUT OF SCOPE Topics

1. Project Management skills
2. Project Documentation (status meeting notes, change requests,...)

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.**

Attendees who pass the exam will receive the **CCH® Tagetik CHAMPION CERTIFICATE**.

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



Novice On-boarding Bootcamp

The Novice Bootcamp is an intensive **2 week on-boarding program** designed to improve and speed up the on-boarding of new Implementers (either CCH® Tagetik new hires or Partners). **Recommended also for Developers and Pre-sales.**

Duration: 10 days

Audience: New Employee or Implementers with no experience with CCH® Tagetik

Prerequisites: We define as "Novice" a new implementer with little or no previous experiences in the CPM world. New hires fresh out from University or with experience in a completely different market

Objectives: This 2-weeks bootcamp is specifically design to bring a new resource up-to-speed with all the knowledge and skills required to work on a CCH® Tagetik implementation. The peculiarities of this bootcamp are:

- a. Mix between Product Skills and Soft Skills
- b. Team Building and Team working activities throughout the whole camp
- c. Simulation of an end-to-end PoC, where all the acquired knowledge and skills will be tested and used
- d. Overview of the whole Company structure, with dedicated sessions delivered by various Departments

Topics

1. Data Model Standard Course
2. Output Reporting Standard Course
3. Data Collection Standard Course
4. ETL Overview
5. Troubleshooting best practices
6. Overview on the Office of Finance
7. Presentation Skills + Presentation role-play
8. Additional Soft Skills
9. Meeting with Departments (Sales, Marketing, Support, Development, etc.)
10. Final Ent-to-end PoC
 - a. 2 days- Work in team project
 - b. NOT step-by-step approach, but simulation of the real PoC
 - c. Final Presentation with "customer questions" simulation



Self-paced Novice OnBoarding

Duration: Variable

Audience: Implementers and Internal

Prerequisites: None

Objectives: This training program is delivered via blended learning varying from e-learning, guided sessions with a certified CCH® Tagetik trainer to training at your own pace to know and learn the CCH® Tagetik basics to build and maintain an application.

Topics

Novice e-learning

Digital Assets regarding:

1. Data Model
2. Output Reporting
3. Data Collection

Strongly recommended 100% of completion

Hands-on Lab

One week of access to a standard CCH® Tagetik training environment for self-practice.

Assets available:

1. Workshops guide
2. Training documentation
3. Quick Reference cards
4. Mentoring/ Coaching on scheduled moments during the week

PLUS: Q&A Session with a live CCH® Tagetik trainer: ask questions about the Novice e-learning and discuss the next steps and hand-over of access to Hands-on Lab.

Business Case Lab

3 days of access to a Business Case application for an end-to-end PoC simulation to challenge the knowledge acquired from previous steps.

2h Webinar for final presentation of the business case results with your co-attendees and the CCH® Tagetik trainer.

Novice On-line Assessment

The online assessment concurs to the Individual certification to become a CCH® Tagetik Novice.

The assessment is automatically activated as conclusion of the Learning Path.



Train the Trainer

Duration: 3 days (Variable)

Audience: Implementers and Internal.

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

Prerequisites:

1. **Personal requirement:** Being highly motivated and passionate about education.
2. **Knowledge requirement:** CCH Tagetik Novice certification

Objectives

1. Provide all the information and skills necessary to become a professional trainer and deliver proficiently 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 Consolidation Expert:

1. CAN deliver Novice, Collaborative Office or Consolidation courses;
2. CANNOT deliver Consolidation Pro or Planning Expert courses.

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:

1. Verbal communication
2. Non-verbal communication
3. How to prepare / rehearse for a training
4. How to approach a CCH Tagetik Academy training course
5. How to deliver a remote training
6. How to deal with questions
7. How to deal with "peculiar" attendees
8. How to present a CCH Tagetik topic
9. Role play, gaming sessions and discussions

Additional info

As a certified trainer, the attendee will be able to access the training material on our LMS (Litmos).



Champion Exam - Consolidation

Duration: 2 days

Audience: Implementers with Product and Solution Design knowledge

Eligibility: Consolidation "Pro" certification and Solution Design Class

Exam Description: This two days exam, divided into 4 workshops, will test:

- Attendee's capability to face the most common challenges in a CCH® Tagetik project.
- Attendee's knowledge of the full Financial Performance Platform.

IN SCOPE Topics

- a. Data-model
- b. Process and Workflows
- c. Data Entry & Reporting (Financial Workspace and Analytic Workspace)
- d. Consolidation setup (Rules, Logics, Dedicated data processes)

OUT OF SCOPE Topics

1. Project Management skills
2. Project Documentation (status meeting notes, change requests,...)

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.**

Attendees who pass the exam will receive the **CCH® Tagetik CHAMPION CERTIFICATE**.

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

