



Wolters
Kluwer

CCH® Tagetik

Datasheet

Intelligent Analytics

Get answers faster with GenAI-powered analytics and Excel 365 reporting

CCH Tagetik Intelligent Analytics is a powerful self-service reporting and analytics engine that uses AI-based modeling, reporting, and visualization tools to present strategic intelligence in seconds.

Just Ask AI — your GenAI assistant — a question by voice or chat, and it instantly delivers answers in the best format: chart, table, report, dashboard, or graph. Whether you're working in dashboards, visualizations or Excel 365, all you need to do is ask.

CCH Tagetik democratizes analytics and reporting for the finance team and beyond unlocking insights hidden in your high volumes of data.

CCH® Tagetik Intelligent Analytics

Get quick answers to complex performance questions

Intelligent Analytics uses Ask AI, your GenAI assistant, to enhance data exploration. Simply Ask AI a question in your natural language — via voice or text — and it instantly produces the answer by exploring your performance management data in real-time.

Create clear visualizations in a flash

Visualizations foster understanding and influence, but illustrating data trends has always been a slow process. Intelligent Analytics instantly generates charts, tables, dashboards, and graphs that bring performance to life. Prefer a different format? Just Ask AI, and it will deliver an alternative.

Instantly generate reports

Give your Excel 365 spreadsheets the power of Ask AI. Simply ask your question, and it instantly transforms raw data from large, complex spreadsheets into clear, visual, and actionable insights.

Mine analytics from enormous data volumes

Ask and you shall receive. No more scouring CPM reports, filings, presentations, and records to find answers for executives. Just Ask AI, and it instantly locates the information within large volumes of granular performance data and delivers it in a presentation-ready visual.

Transform Excel 365 spreadsheets into insight machines

The Intelligent Analytics Excel Add-in lets you use Ask AI directly in Excel to turn raw spreadsheet data into actionable insights. Ask questions, get instant answers, generate reports on demand, and transform tables into clear, compelling visualizations.

Democratize performance insights for everyone

Deep performance insights aren't just useful to finance teams. Give colleagues from sales, HR, supply chain, and operations the data discovery power of Ask AI so they too can access superior analytics. Bonus: your integrated business planning has never been more insightful.

Intelligent Analytics democratizes insights and reporting for finance and business lines

Financial Close & Consolidation:

- Trial Balance Variance reporting
- Intercompany Reconciliation Analysis
- Currency translation checks and adjustments

Enterprise Planning:

- Budget vs. Actual Variance Analysis
- Rolling Forecast Model
- KPI Dashboard Creation

ESG and Regulatory:

- Carbon Emissions Tracking
- Regulatory Compliance Checklist Monitoring
- ESG Scorecard Reporting



Why CCH Tagetik

- Single source of trusted data
- Familiar Microsoft 365 tools for finance
- AI-powered CCH Tagetik Intelligent Platform to increase accuracy, efficiency, and productivity

CCH® Tagetik Intelligent Analytics

Dashboards and Visualizations

Turn questions into insights instantly with Intelligent Analytics. Just Ask AI by voice or chat.

Instant visualizations: Generate report-ready tables, pie charts, waterfall charts, and graphs in seconds.

Dynamic dashboards: Create drillable, interactive dashboards on-the-fly to explore data from every angle.

Deep data discovery: Break through dimensions, hierarchies, and departmental silos to uncover insights hidden across your enterprise.

Excel 365 Add-In

Bring the power of Ask AI directly into Excel 365 and turn raw data into instant insights.

Query and analyze at lightning speed: Ask AI generates reports, summarizes large spreadsheets, and analyzes multiple tables and datasets in seconds.

Collaborate seamlessly: Share insights and reports with decision-makers via Microsoft SharePoint, keeping your team aligned and informed.

Boost accuracy with CCH Tagetik: Connect Excel directly to CCH Tagetik for advanced reporting and reliable, real-time data analysis within the tools you already know.

Ask AI

Your GenAI assistant turns natural language questions into instant insights.

Smart data discovery and analysis: Ask AI explores any reporting view and delivers instant answers, including no-code dashboards and visualizations.

Voice or chat: Get answers your way. Type your question in the chatbox or speak it aloud for immediate results.

Multi-language: Ask AI is available in many languages, including English, Chinese, German, Italian, Japanese, Spanish and more.

CCH® Tagetik Intelligent Analytics

The screenshot shows the CCH Tagetik Intelligent Analytics Excel 365 Add-In. It displays a large data table with multiple columns and rows. A chat window on the right is titled 'Ask AI' and contains a conversation about revenue data. The table appears to be a detailed financial report, possibly a P&L statement, with columns for various entities and metrics.

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



CCH® Tagetik
by Wolters Kluwer