

# CCH<sup>®</sup> Tagetik Collaborative Office

## Datasheet



### Connect narrative and numbers automatically

When you think of financial or management reporting, do you think about numbers or about communication? It's the narrative that communicates the real insight into what the numbers mean to the business, to its stakeholders and to its future. Our Collaborative Office solution adds unique workflow and collaboration capabilities to Microsoft Word™ and PowerPoint™ so you can connect the narrative to numbers across all your reports, including financial statements, management reports, earnings presentations and more.

Spend less time building and vetting reports and more time interpreting and communicating the current and future business impact when you use CCH Tagetik.

### CCH Tagetik Collaborative Office

#### Connected collaboration

Integrate the last mile of finance with the rest of the business. Finance and business users work together in the same Word or PowerPoint document at the same time, without risking data overlap. This way, all contributors can effectively analyze performance, identify trends, or write supporting narratives without losing any confidence in the numbers.

#### Complete transparency

Whether it's an earnings presentation, management performance review document or a financial statement, you have complete transparency across all reports and down into the source data whenever you need it.

#### Faster reporting

Reduce the time it takes to create and approve reports with automated data validation in a familiar Microsoft Office™ interface using a single version of the truth.

Speed up the monthly reporting process by rolling reports forward and with the administrative power to identify bottlenecks before they occur.

#### Consistency across all reports

When numbers change, there's no need to manually rekey numbers into multiple reports. The Collaborative Office dynamically refreshes data to reflect the most up-to-date information everywhere it appears, automatically.

#### Reduced risk of error

An extra zero here or a missed update there can jeopardize both CFO and stakeholder confidence. Remove the error risk behind manual changes and save time cross-checking information with automatic data validation, governance and a single source of the truth across all reports.

#### No learning curve

Word, PowerPoint, and Excel: native integration to the Microsoft Office™ tools that finance and business users already know and love allows you to confidently involve more contributors from finance and beyond for faster reporting with more accountability, while keeping finance in the driver's seat.

**“On top of the efficiencies and speeding up the process, Tagetik gives us a different perspective on how we look at our numbers.**

**I would recommend Tagetik to any company that is serious about taking reporting to the next level”**

**Paul Kim**

Portfolio Controller,  
Green Courte Partners



## Why CCH Tagetik

- **Finance Owned:** Purpose built to be maintained by Finance, reducing dependency on IT.
- **Unified CPM Solution:** Consolidation, Planning and Reporting in one solution provide confidence in your data.
- **Reliability:** Our implementation team and partners consistently deliver.
- **Cloud without Compromise:** On premise. On cloud. One solution. The choice is yours!

## About Wolters Kluwer

Wolters Kluwer (WKL) is a global leader in professional information, software solutions, and services for the healthcare; tax and accounting; governance, risk and compliance; and legal and regulatory sectors. We help our customers make critical decisions every day by providing expert solutions that combine deep domain knowledge with technology and services. Wolters Kluwer reported 2020 annual revenues of €4.6 billion. The group serves customers in over 180 countries, maintains operations in over 40 countries, and employs approximately 19,200 people worldwide. The company is headquartered in Alphen aan den Rijn, the Netherlands. Wolters Kluwer shares are listed on Euronext Amsterdam (WKL) and are included in the AEX and Euronext 100 indices. Wolters Kluwer has a sponsored Level 1 American Depositary Receipt (ADR) program. The ADRs are traded on the over-the-counter market in the U.S. (WTKWY).

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## Key Capabilities

- **Data governance and control:** With data governance and security, contributors can work in the same document at the same time, without overlap.
- **Communication tools:** Users collaborate via comments, instant messaging, or email while managers track progress via dashboard.
- **Dynamic numbers and narrative across reports:** When a number changes, numeric and narrative dynamically update across all the reports in which they appear. With built-in roll forward, load the latest data and reports and narratives update automatically.
- **Create standard reporting templates:** Package up formatting, fonts, logos and other standards into templates to ensure consistent usage across the organization. Formats include PDF, PPT, XLS, Word, XML, HTML and more.
- **Combine data from multiple sources:** Whether you're using one data source or twenty, Collaborative Office integrates easily with existing systems to incorporate all of the information you need to produce your reports.
- **Easy audits:** With CCH Tagetik's audit trail and audit log, track changes every step of the way, know the source of any number on a report and have full visibility into when a number was changed and by whom.

## For all your reporting needs

### Internal Reports

Board books, management reports, strategic plans, and budget books

### Financial Reports

Financial statements, proxy statements, press releases, annual and quarterly reports including associated narrative and footnotes

### Management Reports

Provide the business with decision-making reports, documents and presentations with complete confidence that the numbers used to drive decisions are the same ones used in approved financial statements and regulatory reports

### Regulatory Reports

Period reports such as Comprehensive Financial Reports (CAFR), Comprehensive Capital and Analysis Review (CCAR) and industry specific requirements (Solvency II, IFRS) according to the regulatory requirements (US GAAP, IFRS)