
Customer Training Catalogue

Reference Tech (on-prem installation)

CCH® Tagetik | ACADEMY

This learning path is designed to provide you the core knowledge, together with Tips and Best Practices, to efficiently support the application key users and end user community. Remember that you can follow this path at your own pace, even if we recommend to respect the content and order we provide. The full learning path is the only way to get the most out of your CCH® Tagetik and of your time investment in becoming a real Certified Reference Tech.

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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 as a CCH® Tagetik Administrator, Contributor or System Administrator. Standard End-User training are available, while customized courses for End-Users can be developed on-demand. For more information about dedicated learning path, visit the [Customer-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



Reference Tech (for on-premise) Learning Path

This learning path is addressed to the technical reference person mandatory for on-premises contracts.

Why should I follow this path?

This learning path is designed to provide you the core knowledge, together with Tips and Best Practices, to efficiently maintain and manage your application. Remember that you can follow this path at your own pace, even if we recommend to respect the content and order we provide.

The full learning path is the only way to get the most out of your CCH® Tagetik and of your time investment in becoming a real Certified Solution Pro.

Application Builder

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

Technical basics

- Tech Standard Operations
- Tech Troubleshooting

(Optional) Technical advanced

- Tech System Design
- Tech Advanced Operations



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



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



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



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



Technical Standard Operations

Training approach: ILT - (Instructor Led)

Duration: 3 days

Audience: Technical Consultants, IT professionals

Prerequisites:

- Technical Specialist certification
- 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.

Objective: This course will provide participants with an in-depth and hands-on look at the application and infrastructure architecture, installation and upgrade procedures, configuration and management. Through hands-on exercises students will learn the application technical architecture and the basics of installing, configuring, upgrading, and maintaining the CCH Tagetik application. Technical theory, details, and practical hands-on experience will be provided.

⚠ 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

Training approach: ILT - (Instructor Led)

Duration: 1 day

Audience: Technical Consultants, IT professionals

Prerequisites:

- Technical Standard Operations.
- 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: Participants will develop a better understanding about how to troubleshoot problems with the application 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. Overview and Survey of Troubleshooting Strategies
2. Application Infrastructure Architecture Review
3. General Classes of Tagetik Issues
4. Sources of Data
5. Application Tools for Troubleshooting
6. External Tools
7. Issue Management / CCH Tagetik Support Portal



Technical Advanced Operations

Training approach: ILT - (Instructor Led)

Duration: 1 day

Audience: Technical Consultants, IT professionals

Prerequisites:

- Technical Standard Operations, Technical Troubleshooting
- Extensive experience with the technical aspects of installation, upgrades and other infrastructure related aspects.

Objectives: This course will provide participants information and practical hands-on experience on multiple 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. The course contents will draw from the following topics and others based on participant requests.

⚠ Important: This course is relevant to on-premises or private cloud deployments of the application

Topics:

1. Application Security, Encryption & Privacy Configurations including Https configuration.
2. Advanced Client Add-in Configuration (Multiple users)
3. Installation with other AS/DB combinations (ex. Postgres and/or IBM Liberty)
4. Multiple application Instances on same server
5. APIs and Endpoints for control and data integration
6. TDL installation
7. Additional Topics as time permits



Technical System Design

Training approach: ILT - (Instructor Led)

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: Extensive experience with the technical aspects of installation, upgrades and other infrastructure related aspects.

⚠ Important: This course is relevant to on-premises or private cloud deployments of the application

Topics:

1. Technical Architecture of Application & Infrastructure
2. Factors Influencing System Design
3. Project Types
4. Project Characteristics such as number of users
5. Designing for Scalability
6. Multiple Environments
7. Designing for Security
8. High Availability/Disaster Recovery/Business Continuity
9. CCH Tagetik Responses to Factors

