
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.

Available 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.

Course Delivery

Most of 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.

For selected topic, we provide also self-serve modules (e-learning, e-learning + self-practice).

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.
- 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).

For additional information, please contact your local Academy representative, or write to info.academy@wolterskluwer.com



Data model

Duration: 1 day

Audience: Administrators and Consultants

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 Consultants

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 Consultants

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



ETL Foundation

Duration: 1 day

Audience: Administrators, Data integration specialists and Consultants

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



System Administration

Duration: 1 day

Audience: Consultants, 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



Consolidation Basic

Duration: 2 days

Audience: Administrators, Consultants 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



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



Consolidation Pro

Duration: 2 days

Audience: Consultants

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



Analytic Information Hub Basics

Duration: 2 days

Audience: Administrators, IT Professional and Consultants

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



Champion Exam - Consolidation

Duration: 2 days

Audience: Consultants with Product and Solution Design knowledge

Eligibility: Consolidation Pro certification

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.

