Consultants Training Catalogue

ESG Expert

CCH® Tagetik | **ACADEMY**

To become a certified CCH Tagetik ESG Expert, you must complete the ESG Expert 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.

Wolters Kluwer

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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

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

Analytic Information Hub Pro

Duration: 2 days

Audience : Administrators, IT Professional, Consultants 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

ESG Solution Basic

Duration: Self paced eLearning + allotted practice time on a cloud sandbox

Audience: Consultants

Prerequisites : Novice, AIH Basics and AIH Pro. Basic theoretical knowledge regarding ESG and overview knowledge regarding our ESG Solution.

CCH Tagetik Excel Reporting AddIn pre-installed and ready to be configured.

Objectives:

In this self-paced course, you will learn how to set up our pre-package ESG & Sustainability Performance Management solution as an user of CCH Tagetik.

 Topics:

1. Usage of ESG Solution
   - Introduction of ESG (theory)
   - Overview of our ESG Solution
   - How to use our ESG Solution?

2. Set-up of ESG Solution
   - Recap of the first course
   - Overview of this course
       - How to install our ESG Solution?
       - How to customize our ESG Solution?
   - How to use our ESG Solution?
       - Collect (custom) ESG & Sustainability KPI's
       - Apply EU Taxonomy (for Banks as example Industry)
       - Report & disclose ESG & Sustainability results
   - How to set-up ESG Solution?
       - Apply (existing) pre-configured KPI (based on GRI)
       - Create (new) custom KPI
   - Hands-on practising in ESG Solution