Partner Training Catalogue

Budgeting and Planning Champion

CCH® Tagetik | **ACADEMY**

To become a certified CCH Tagetik Budgeting and Planning Champion, you must complete the Budgeting and Planning 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

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

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

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

Budgeting and Planning Basic

Duration: 2 days

Audience: Administrator, Consultants IT Professional

Prerequisites: Data Model, Output Reporting, Data Collection, Database file management, basic SQL Scripting Language (recommended)

Objectives: This training course covers the skills necessary to follow the full budgeting process: from data loading to customization of specific calculation logics through the implementation of advanced calculations (MDX-like). The course will also provide the ability to implement Profitability model leveraging the CCH® Tagetik built-in Allocation Engine. In addition, all skills necessary to create advanced and powerful Excel forms are included.

Topics:

1. Budgeting Process setup

2. Spreading tools

3. Asset Depreciation tool

4. Allocation engine

5. Calculation logics

6. Copy tools

7. Editable category pool

Budgeting and Planning Pro

Duration: 2 days

Audience: Administrators, Consultants and Consolidators

Prerequisites: Planning Expert courses (Data Model, Output Reporting and Data Collection, Budgeting & Planning, AIH Basics, ETL)

Recommended : Project experience on Planning projects, good experience with MDX scripting and Report design.

Objectives: This training course focuses on advanced design and optimization of the most common calculation tools used in Planning & Budgeting projects. In particular the focus is on advanced settings (reporting and Allocation) or boosting performances (MDX scripting and Form design).

Topics:

1. MDX Optimization
   a. How to write a "clear" MDX
   b. Common performance pitfalls
   c. Dimensional matching
   d. Time movements
2. Implementation Best practices
3. Allocation engine
   a. Allocation vs other calculation Tools
   b. Advanced options
4. Advanced Reporting
   a. Data processing from form
   b. Implementing "tricky" Data Entry Form
   c. Advanced selection practical cases

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

Champion Exam - Planning

Duration: 2 days

Audience: Consultants with Product and Solution Design knowledge

Eligibility: Planning Pro

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

1. Understanding the business requirements and providing a Solution Design
2. Hands-on:
    a. Data-model
    b. Process and Workflows
    c. Data Entry & Reporting
    d. Reporting
    e. Calculation tools (such as MD Scripting, Allocation, Asset Depreciation, Forecast model, DTP,…)

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.