Consultants Training Catalogue

Technical Champion

CCH® Tagetik | ACADEMY

To become a certified CCH Tagetik Technical Champion, you must complete the Technical 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

Technical Standard Operations

Duration: 3 days

Audience: Technical Consultants, IT professionals

Prerequisites:

- Product Expert 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 procedures and configuration. The students will learn the application technical architecture and the basics of installing, configuring, and maintaining the CCH Tagetik application. For practical hands-on experience, participants will work on their own servers to install an AS server, configure a RDBMS (i.e. SQL Server, or PostgreSQL).

⚠️ 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 and Application System Properties and Configuration

8. SALES, PRESALES Technical Services such as sizing and compatibility

Technical Troubleshooting

Duration: 1 day

Audience: Technical Consultants, IT professionals

Prerequisites:

- Technical Standard Operations (TSO) participation.

- 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: This course will provide participants 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. Sources of Information within the application and on the servers, i.e. audit and server logs

2. Server side Troubleshooting

3. Client side Troubleshooting

4. Troubleshooting Other Problems such as networking, authentication, backups, performance.

5. Issue Management - Workflow, Customer Expectations, Interaction with Support

Technical Advanced Operations

Duration: 1 day

Audience: Technical Consultants, IT professionals

Prerequisites

- Technical Expert Certification Level

- Extensive experience with technical aspects of the application.

Objectives: This course will provide participants information and practical hands-on experience on operations and 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. Minor adjustments on the topics covered possible based on participant requests.

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

Topics:

1. Authentication Integrations

2. Qlik Integration

3. Application Security, Encryption & Privacy

4. Performance Tuning

5. Advanced Client Tier Configuration (Launcher, Citrix/TS for multiple users)

6. APIs and Endpoints for control and data integration

7. Network Troubleshooting

8. Notifications and Email

9. Additional Topics as time permits

Technical System Design

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: The goal of this course is to provide participants with an overview of the best practice application architecture as it relates to different requirements such as large and very large projects, projects with special infrastructure requirements, infrastructure with special limitations, and HA/DR/LB architecture.

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

Topics:

1. Overview of basic and complex infrastructure architecture

2. Sizing and Infrastructure

3. HA/DR architectures

4. Third Party Software Integrations for Reporting and Analytics

5. AIH Architecture

6. Small Projects and other Scenarios & Requirements