
Complete Training Catalogue

For Consultants and Customers

CCH® Tagetik | ACADEMY

This catalogue contains all the training courses offered by the Academy. Some courses are more recommended for Customers and some for Consultants (you can refer to the dedicated catalogues by "role" in the academy page)

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Table of contents

Welcome to the CCH® Tagetik Academy	5
Available Learning Paths	5
Course Delivery	5
Course Registration	5
Overview Training	6
Data model	7
Output Reporting	8
Data Collection	9
ETL Foundation	10
System Administration	11
Data Integration	12
Consolidation Basic	13
Collaborative Office	14
Consolidation Pro	15
Champion Exam - Consolidation	16
Account Reconciliation	17
Transaction Matching	18
Analytic Information Hub Basics	19
Budgeting and Planning Basic	20
Analytic Information Hub Pro	21
Budgeting and Planning Pro	22
Champion Exam - Planning	23
SCP Demand Planning	24
SCP Supply Planning	25
SCP Administration	26
SCP Self-paced - Business Analyst Basics	27
SCP Self-paced - Implementation Engineer Basics	28
SCP Self-paced - Business Analyst Expert	29
SCP Self-paced - Implementation Engineer Expert	30
End User Basics - Budgeting & Planning	31
End User Basics - Consolidation	32
Customized End-user Training	33
Functional Application Management	34
ESG Solution Basic	35
Lease Accounting Solution (IFRS 16 & ASC842)	36
IFRS 17 Basic	37
IFRS 17 Pro	38
Predictive Intelligence Basic	39

Technical Advanced Operations 40
Technical System Design 41
Technical Overview training 42
Technical Standard Operations 43
Technical Troubleshooting 44
Solution Architect 45
Train the Trainer 46

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



Overview Training

Duration: 1 day

Audience: Project team members

Prerequisites: None

Objectives: The Overview Training course will provide attendees with the basic knowledge of CCH® Tagetik. The aim is to provide all involved team members, in a project, with the minimum skills necessary to cooperate efficiently. In addition another goal is to ensure that a high quality analysis phase takes place at the beginning of the project to create the conditions for an effective and productive project team awareness.

Topics:

1. Software architecture.
2. Dimensions.
3. Software interfaces.
4. Available methods for loading and processing Data.
5. High-level description of Reporting tool:
 - a. Main concepts of Forms design.
 - b. Navigation and Data Entry modes.
6. How Tagetik approaches the business processes.
7. General Tips & Techniques and Best Practices.



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



Data Integration

Duration: 1 day

Audience: Administrators, AIH specialists and Consultants

Prerequisites: Data Model (mandatory), Output Reporting & Data Collection (recommended) training, AIH Basics (mandatory), understanding of ETL concept.

Objectives: This training teaches how to setup and use the RESTful API in CCH® Tagetik. With the concepts explained, the attendees will learn how to expose and consume data and metadata within AIH via RESTful API. As well the training will provide information on performances, typical OData connections and the available types of authentication.

Topics:

1. Data flow in CCH Tagetik
2. RESTful API in CCH Tagetik
3. How to configure CCH Tagetik to use RESTful API
4. Consuming and exposing via OData
5. Expose metadata and Analytical dimensions
6. Data Target
7. AIH components and OData service
8. Performances
9. Available authentication and OData typical connections
10. Audit data processing exposed via OData
11. Running MDM, Import/Export AW, Import/Export Repository, DTP and Data Source mapping via RESTful API



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



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.



Account Reconciliation

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

Audience: Administrator and Consultants

Prerequisites: Data Model, Output Reporting, Data Collection, ETL and AIH basic.

Objectives: To gain the skills and knowledge necessary to tailor the prepackage solution offered by CCH Tagetik to the Account Reconciliation closing process of the customer.

Topics:

1. Introduction: what is Account Reconciliation
2. End user activities
3. Administrator activities:
 - a. Introduction and Rules
 - b. Upload
 - c. Final configurations
 - d. Checks
4. Additional info



Transaction Matching

Duration: 1 day

Audience: Administrator and Consultants

Prerequisites: Data Model, Output Reporting, Data Collection, ETL, AIH basic, Account Reconciliation. Consolidation Basic knowledge is recommended

Objectives: To gain the skills and knowledge necessary to tailor the prepackage solution offered by CCH Tagetik to the Account Reconciliation closing process of the customer.

Topics:

1. Introduction
2. Case 1: General Ledger/Bank Statement (e.g. Account Reconciliation)
3. Case 2: IC matching (e.g. Consolidation)
4. Inside the Solution



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



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



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



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.



SCP Demand Planning

Duration: 1.5 days (12 hours)

Audience: Demand planners, sales, marketing, forecasters

Prerequisites: Knowledge of demand or sales target planning

Objectives: This training course teaches navigation and demand planning functions in CCH Tagetik SCP.

Topics:

1. SCP System Navigation Training
2. SCP Collaboration Hub
3. SCP Forecast Methods
4. SCP Reports Training
5. SCP New Product Introductions
6. SCP Demand Workflow Management
7. Tips & Tricks

Additional info: Exercises are included



SCP Supply Planning

Duration: 1.5 days (12 hours)

Audience: Buyers, supply planners, procurement, production, and capacity planners

Prerequisites: Knowledge of supply planning

Objectives: This training course teaches navigation and inventory management functions in CCH Tagetik SCP.

Topics:

1. SCP System Navigation Training
2. SCP Collaboration Hub
3. SCP Inventory Strategies
4. SCP Reports Training
5. SCP Supply Workflow Management
6. SCP Procurement
7. SCP Production and Capacity
8. Tips & Tricks

Additional info: Exercises are included



SCP Administration

Duration: ½ Day (4 hours)

Audience: Administrator of the SCP system

Prerequisites: Identified by supply chain team to be the system administrator of the system.

Objectives: This training course teaches the administration functions in CCH Tagetik SCP.

Topics:

1. SCP System Navigation Training
2. SCP Collaboration Hub
3. SCP System Status
4. SCP Administration Workflow Management
5. SCP Setup Functions
6. SCP ABC Classifier
7. Tips & Tricks

Additional info: Exercises are included



SCP Self-paced - Business Analyst Basics

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

Audience: Consultants

Prerequisites: Basic understanding of the Supply Chain field is recommended.

Objectives:

You will learn how Sales, Demand, Production and Capacity topics are being covered inside the software. You will also be taught on how to leverage standard documentation to collect customers Functional Requirements. Finally, an introduction to the most common Use Cases is also given, and at how to map Process Flows.

Topics:

- **Module 1** - Intro to Supply Chain Terminology and Process
- **Module 2** - Intro to SCP modules
 - System Navigation, Sales, and Demand Plan
 - Supply Plan
 - Production and Capacity plan
- **Module 3** - Implementation and System Architecture
 - System Implementation Project and Team
 - System Architecture
 - Aspects of building an instance
- **Module 4** - Customer Requirements Gathering



SCP Self-paced - Implementation Engineer Basics

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

Audience: Consultants

Prerequisites: Basic understanding of the Supply Chain field is recommended.

Objectives:

You will learn how Sales, Demand, Production and Capacity topics are being covered inside the software. You will also be taught on how to work with JSON system files and how each single file interact with each other to make it feasible to build an instance. You will also get an understanding of how to import and export data from the system. Finally, there will be a Business Case and you will be able to build a Fast Track instance.

Topics:

- **Module 1** - Intro to Supply Chain Terminology and Process
- **Module 2** - Intro to SCP modules
 - System Navigation, Sales, and Demand Plan
 - Supply Plan
 - Production and Capacity plan
- **Module 3** - Implementation and System Architecture
 - System Implementation Project and Team
 - System Architecture
 - Aspects of building an instance
- **Module 4** – System File Structures
 - Explanation of System File Structures
- **Module 5** - System Imports and Exports from Admin
 - Data Imports from the System Administration Panel
 - Data Exports from the System Administration Panel
- **Module 6** - End-to-End FastTrack Build
 - Business Case – Build a FastTrack Instance



SCP Self-paced - Business Analyst Expert

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

Audience: Consultants

Prerequisites: SCP Self-Paced Business Analyst Basics

Objectives:

You will dive deeper into the potential of Demand, Supply and Production modules in the software. You will also be taught how data is structured and which are the most common planning horizons in SCP. Then, you will be given prompts on how to write a functional requirement document and a technical specification document. Lastly, you will learn how to map the customer processes into SCP workflows, with examples.

Topics:

- **Module 1** - Details of Demand Planning
- **Module 2** - Details of Supply Planning
- **Module 3** - Details of Production and Capacity Planning
- **Module 4** - Intro to Data Structures and Planning Horizons
- **Module 5** - How to Write an FRD and Tech Spec
- **Module 6** - How to Map Customer Process into Workflows



SCP Self-paced - Implementation Engineer Expert

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

Audience: Consultants

Prerequisites: SCP Self-Paced Implementation Engineers Basics

Objectives:

You will dive deeper into the potential of Demand, Supply and Production modules in the software. You will also be taught how to build portions of an instance starting from a Tech Spec, on how to access Advanced Configurations and how to Troubleshoot. Eventually, you will be provided access to the Advanced Settings information in the software.

Topics:

- **Module 1** - Details of Demand Planning
- **Module 2** - Details of Supply Planning
- **Module 3** - Details of Production and Capacity Planning
- **Module 4** - Building from a Tech Spec
- **Module 5** - Introduction to Advanced Configurations and Troubleshooting
- **Module 6** - Advanced Settings



End User Basics - Budgeting & Planning

Duration: 1 day

Audience: Budgeting & Planning Contributors, Budgeting & Planning End users

Prerequisites :None

Objectives: Learn how to use various budgeting & planning functions and tools in a CCH Tagetik application.

This hands-on training course provides knowledge of various budgeting & planning functions and tools in a CCH Tagetik application.

Topics:

- How to run a report via web
- How to collect Forecast 2 data
- How to collect Multiyear plan data
- How to collect Budget data



End User Basics - Consolidation

Duration: 1 day

Audience: Consolidation Contributors, Consolidation End users

Prerequisites : None

Objectives: Learn how to use the basic functions of navigating and running reports, contributing to consolidation process and finally running a (sub)consolidation in a CCH Tagetik environment.

This hands-on training course learns you how to use the basic functions of navigating and running reports, contributing to consolidation process and finally running a (sub)consolidation in a CCH Tagetik environment.

Topics:

- How to navigate & run a report via web
- How to contribute data
- How to consolidate data
- How to perform a Simulation: What-if Analysis with financial workspace of CCH® Tagetik



Customized End-user Training

CCH® Tagetik Academy provides STANDARD training for End Users (both in Consolidation or Planning).

The Academy offers the additional possibility to develop a Customized End-user Training, tailored on your need and designed on your application.

Duration: to be determined based on training design session

Prices: Prices and timing to be discussed with the implementation team. Customized End-user training is quoted as a separate project, on a T&M approach.

Audience: End-Users

Prerequisites: none

Objectives: This customized training focuses on End-user activities (cockpit, matching, data collection, submission etc.). It is Developed on the Customer's application and can follow different approaches (Train-the-trainer, class, e-learning, blended approach etc.)

IMPORTANT: Customized End-user training courses are developed on-demand for a specific Customer. Prices, availability, timing and other details should be discussed with your training representative. Please mind that this service might not be available in every region.



Functional Application Management

Duration: 1 day

Audience: Administrators and Consultants

Prerequisites : Data Model

Objectives: the Functional Application Management (FAM) course will give anybody who has an Administrator role the necessary skills to maintain the CCH® Tagetik application. During the course students will learn to get an application ready for the coming year. But also learn how to adjust the application in case of mergers, acquisitions, new accounts, new products or any other changes in the datamodel. In most companies changes to the datamodel will occur on regular basis. It's important that administrators are aware of the implications of these changes and when they need to run a deployment. This course aims to make Ccompanies less dependent of their CCH Tagetik Implementation partner

Topics:

1. Maintain datamodel
2. Maintain workflow & process
3. Maintain consolidation
4. Other application management tools



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



Lease Accounting Solution (IFRS 16 & ASC842)

Duration: 2 days

Audience: Administrators and/or key users and project team members, Consultants

Prerequisites: Basic knowledge of lease accounting regulation (IFRS16 & ASC842); Data Model and Output Reporting courses.

Objectives: This training gives insights in navigating within the CCH® Tagetik Lease Accounting Solution, both from an End User and Administrator perspective. Also an important part of this training is to get familiar with the CCH® Tagetikterminology, which is an important asset for successful meetings in the design phase. Moreover, this training will provide the ability to leverage all the prepackaged assets (e.g. data entry reports, ETL, carryforward functions, data model) thanks to different hands-on sessions performed throughout the course.

Topics:

1. Lease Accounting Solution overview
2. Behind the solution: Lease Accounting & AIH
3. Lease Accounting data model
4. Lease Accounting standard import ETL
5. Lease Accounting process configuration
6. Lease Accounting advanced functionalities



IFRS 17 Basic

Duration: 2 days

Audience: Consultants and Implementer Partners (currently working on projects or with prior authorization)

Prerequisites: Data Model, Output Reporting, Data Collection, ETL Foundation, AIH Basic. Knowledge of IFRS17 Regulation and CCH® Tagetik Administration.

Objectives: This training course provides consultants with a foundation in the use and configuration of the IFRS17 Starter Kit, in addition to an introduction to the main topics of the IFRS17 accounting Standards. During the course, participants will gain knowledge of the IFRS17 starter kit, its engine, the inputs which are required to the tool and configuration tables. As well as theoretical topics, the course includes an hands on workshops and a practical case study.

Topics:

1. Introduction to the IFRS Solution
2. IFRS Solution Architecture and Engine
3. IFRS Input Data Model
4. IFRS Configuration and Reference Tables
5. Standard IFRS Workflow and Calculation Steps
6. IFRS Reporting
7. Case Study on BBA



IFRS 17 Pro

Duration: 2 days

Audience: Consultants and Implementer Partners (currently working on projects or with prior authorization)

Prerequisites: IFRS17 Basic, AIH PRO. Knowledge of IFRS17 Regulation and CCH® Tagetik Administration.

Objectives: This training course provides consultants with a deeper analysis on the IFRS17 Tagetik Solution Analytical Workspace, giving a technical explanation and overview of his main components (Datasets, DTP, Special Methods). During the course, participants will gain knowledge of the specific configurations that are mostly used during the project implementation phase and will be provided with the guidelines on how to debug some of the most common issues. As well as theoretical topics, the course includes an of hand on workshop and a practical case study.

Topics:

1. Overview of IFRS17 Solution
2. IFRS17 Tagetik Solution Analytical Workspace
3. IFRS17 Solution Specific Configurations
4. Project implementation steps and Issues debug
5. Case study for advanced
6. Hand on workshop



Predictive Intelligence Basic

Duration: 1 day

Audience: Administrators, Consultants.

Prerequisites: Novice Certification, Analytical Information Hub Basic and Analytical Information Hub Pro

OR

Novice Certification, Analytical Information Hub Basic and Knowledge of Datasources and Parameters on Analytical Information Hub.

Objectives: This hands-on training course provides the necessary and sufficient knowledge to use the standard advanced analytics model in any CCH Tagetik environment, integrate data, run data processing and read the results.

⚠ Important: In this course the standard predictive model will be covered.

Topics:

1. Machine learning concepts
2. Time series terminology
3. Prerequisites and case study presentation
4. Analytical Workspace set up
5. Data preparation and normalization
6. Machine Learning tasks usage
7. How to read data
8. What if analysis – Comparison of different predictions



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



Technical Overview training

Duration: 1 day

Audience: IT Professional, Help Desk and Consultants

Prerequisites:

- Knowledge of MS Office Excel, Word and PowerPoint usage and configuration
- General experience with Windows, Mac, or Linux-based computers

Objectives: The CCH® Tagetik Technical Overview course will provide attendees with the basic introduction to Tagetik applications from a technical perspective including an overview of the application architecture and the additional components that make up the CCH® Tagetik family of products. The course will also discuss basic maintenance, upgrading, and troubleshooting. The goal of this course is to provide anyone with minimal or no background in CCH® Tagetik and with any level of technical skills with the understanding of the technical architecture of CCH® Tagetik.

Topics:

1. Introduction to Core CCH® Tagetik Application Architecture and infrastructure
2. Important Aspects of Resource Estimation
3. Overview of Installation/Upgrade of the Application and Add-in
4. Introduction to Additional Tagetik Components and Integrations
5. Introduction to Basic Maintenance, Operations, and Troubleshooting



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



Solution Architect

Duration: 2 days

Audience: Consultants with advanced Product knowledge

Prerequisites: "Product Pro" Milestone or a background of at least 5 projects (either on Planning or Consolidation)

Objectives: This training course covers the fundamentals to enable attendees to design a CCH® Tagetik application. After introducing some of the main drivers to consider when designing a solution and discussing a business case, 4 workshops will allow the attendees to learn how to convert customer requirements into an effective design (# of applications, Data-model, Process workflow), discussing with the trainer and the class pro and cons of the design decisions.

Topics

For every business case analyzed, the focus will be on:

1. Data model choices pro and cons
2. Number of Application and impact on implementation
3. Process Design / Workflow (if applicable)
4. Peculiarities of the specific sect (if applicable)

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Train the Trainer

Duration: 2 days

Audience: Consultants and Internal.

⚠ Important: The event is only accessible to Partners with an active Train The Trainer contract.

Prerequisites:

- **Personal requirement:** Being highly motivated and passionate about education.
- **Knowledge requirement:** CCH Tagetik Novice certification

Objectives

1. Provide all the information and skills necessary to become a professional trainer and deliver proficiently official CCH Tagetik training courses.
2. Provide the Trainer Certification of the CCH Tagetik Academy global network.

Please note that having a valid CCH Tagetik product certification:

1. Guarantees the necessary knowledge to deliver a successful class
2. Allows to easily understand the range of courses a trainer can deliver

E.g.: A Trainer certified as Consolidation Expert:

1. CAN deliver Novice, Collaborative Office or Consolidation courses;
2. CANNOT deliver Consolidation Pro or Planning Expert courses.

Topics

The training course focuses on the CCH Tagetik Academy internal processes, as well as, on a set of theoretical and practical topics about professional education. Some of the topics covered are:

1. Verbal communication
2. Non-verbal communication
3. How to prepare / rehearse for a training
4. How to approach a CCH Tagetik Academy training course
5. How to deliver a remote training
6. How to deal with questions
7. How to deal with "peculiar" attendees
8. How to present a CCH Tagetik topic
9. Role play, gaming sessions and discussions



Additional info

As a certified trainer, the attendee will be able to access the training material on our LMS (Litmos).

