Customer Training Catalogue

Administrator - Planning

CCH® Tagetik | **ACADEMY**

This learning path is designed to provide you the core knowledge, together with Tips and Best Practices, to efficiently maintain and manage your application. Remember that you can follow this path at your own pace, even if we recommend to respect the content and order we provide. The full learning path is the only way to get the most out of your CCH® Tagetik and of your time investment in becoming a real Certified Administrator.

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 as a CCH® Tagetik Administrator, Power User or System Administrator. Customized courses for End-Users are available on-demand.

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

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 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