Customer Training Catalogue

Power Users

CCH® Tagetik | **ACADEMY**

This learning path is designed to provide you the necessary knowledge, together with Tips and Best Practices, to make the most out of your application. You will be able to contribute and use CCH Tagetik as well design and maintain reports . 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 Power User.

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