
Customer Training Catalogue

Standalone - Addons

CCH® Tagetik | **ACADEMY**

This learning path shows all the “add-on” single courses available to add skills and competencies on your existing CCH Tagetik knowledge. Remember that you can follow any course in this path at your own pace, even if we recommend to respect the content and order we provide. You can combine any add-on from this learning path to any other learning path

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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



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.



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



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



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).

