SAM Corporate CCH Tagetik Budgeting Training Plan

Topics	Module	Descriptions
Onboarding process - Introduction from HR, PMO		
Overview of CCH Tagetik and Induction to training plan		
Understanding the financial basics from other training materials and CFI (Balance Sheet & Income Statement)		
Introduction to CCH Tagetik		
Introduction to CCH Tagetik		Overview of CCH Tagetik Data Model(Briefing by Training Manager)
		Overview of CCH Tagetik Architecture
CCH Tagetik Interface		
	Admin & User Interface	Overview of CCH Tagetik Admin and User interface with relevant tiles
Metadata		
Scenario	Elements	Scenario dimension - Adding of new scenarios and mapping periods to the scenarios
	Grouping	Scenario grouping creation and mapping of the scenario elements to grouping
Accounts	Elements	Account creation, defining nature, type and conversion
	Hierarchy	Account hierarchy creation and mapping of Account elements
	Dimension restriction	Restricting custom dimension for each accounts
	Financial Structure Template (FST)	Overview on FST, Definition of FST item, Formulas and mapping of each accounts to the FST items
Category	Elements & Grouping	Category creation and category types, Category grouping and mapping of category to the group
Currency	Elements	Currency creation and defining the attributes
Entity	Elements & Hierarchy	Entity creation, Entity currency definition, Entity hierarchy creation and mapping of Entity elements
	Dimension restriction	Restricting the custom dimension for each entity
Variation & detail type	Elements	Variation/ detail type creation
	Grouping	Creation of grouping and mapping of each elements
Control Group	Control Groups	Mapping of variation/ detail type groups in the Account element dimension and verification of parent-child relationship in control group
Custom Dimension	Elements & Hierarchy	Custom dimension element creation, hierarchy creation and mapping of elements
Grouping vs Hierarchy	Grouping	Grouping Definition and its usage
	Hierarchy	Hierarchy Definition and its usage
Discussion		Doubt Clarification on Queries and workshop discussion

Data Model Workshop1		
Workshop Briefing by Training Manager		

Workshop 1 Review and Workshop 2 Briefing		
Data Model Workshop 2		
Review & Presentation		
SQL & Excel Briefing by Training Manager		
SQL & Excel		

ETL (Extraction, Transformation & Loading)		
ETL Briefing by Training Manager		
Predefined ETL		Overview on predefined ETL
Custom ETL		Overview on custom ETL, how to define Extraction, Transformation and Loading
Discussion		Doubt Clarification on Queries and workshop discussion
ETL workshop	Basic	
	Medium	
	Advanced	
Review & Presentation		

Reporting		
Reporting Briefing by Training Manager		
Output report		Overview of Output report, mandatory dimensions, matrix creation
Data entry report		Overview of Data Entry report, mandatory dimensions, matrix creation, Editability definition
CCH Tagetik style		Creation of CCH Tagetik styles and how to apply it to the matrix
Period length		Period Length and its different modes
Amount type		Amount types
Discussion		Doubt Clarification on Queries and workshop discussion
Workshop	Output report	
	Data entry report	
Review & Presentation		

Advanced Reporting		
Advanced Reporting Briefing by Training Manager		
MDX (Multi dimensional script)		Overview of calculation logic and different types of calculation logic
Dynamicity		Overview of Dynamicity and different Selection types
Query report		Query report overview with different types
Filters		Overview on Filters
Discussion		Doubt Clarification on Queries and workshop discussion
Workshop		
Review & Presentation		
Data Collection		
Data Collection Briefing by Training Manager		
Workflow		Workflow overview and mapping of the workflow to the process
Process Setup		Overview on Setting up of the Process
Process cockpit		Overview on Process Cockpit
QDL		Overview of QDL
Discussion		Doubt Clarification on Queries and workshop and final workshop discussion
Workshop		
Review & Presentation		
Workshop Briefing by Training Manager		
Final Workshop		
Final Review & Presentation		