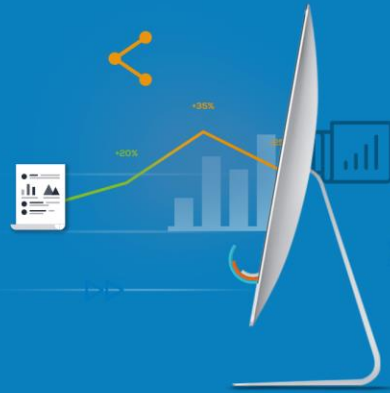


# CCH Tagetik Collaborative Office



## CONNECT NARRATIVE AND NUMBERS AUTOMATICALLY

When you think of financial or management reporting, do you think about numbers or about communication? It's the narrative that communicates the real insight into what the numbers mean to the business, to its stakeholders and to its future. Our Collaborative Office solution adds unique workflow and collaboration capabilities to Microsoft Word™ and PowerPoint™ so you can connect the narrative to numbers across all your reports, including financial statements, management reports, earnings presentations and more.

Spend less time building and vetting reports and more time interpreting and communicating the current and future business impact when you use CCH Tagetik.

## CCH TAGETIK COLLABORATIVE OFFICE

### Connected Collaboration

Integrate the last mile of finance with the rest of the business. Finance and business users work together in the same Word or PowerPoint document at the same time, without risking data overlap. This way, all contributors can effectively analyze performance, identify trends, or write supporting narratives without losing any confidence in the numbers.

### Complete Transparency

Whether it's an earnings presentation, management performance review document or a financial statement, you have complete transparency across all reports and down into the source data whenever you need it.

### Faster Reporting

Reduce the time it takes to create and approve reports with automated data validation in a familiar Microsoft Office™ interface using a single version of the truth.

Speed up the monthly reporting process by rolling reports forward and with the administrative power to identify bottlenecks before they occur.

### Consistency Across All Reports

When numbers change, there's no need to manually rekey numbers into multiple reports. The Collaborative Office dynamically refreshes data to reflect the most up-to-date information everywhere it appears, automatically.

### Reduced Risk of Error

An extra zero here or a missed update there can jeopardize both CFO and stakeholder confidence. Remove the error risk behind manual changes and save time cross-checking information with automatic data validation, governance and a single source of the truth across all reports.

### No Learning Curve

Word, PowerPoint, and Excel: native integration to the Microsoft Office™ tools that finance and business users already know and love allows you to confidently involve more contributors from finance and beyond for faster reporting with more accountability, while keeping finance in the driver's seat.

*“On top of the efficiencies and speeding up the process, Tagetik gives us a different perspective on how we look at our numbers.*”

*I would recommend Tagetik to any company that is serious about taking reporting to the next level.”*

**Paul Kim**

Portfolio Controller,  
Green Courte Partners

## Key Capabilities

- **Data governance and control:** With data governance and security, contributors can work in the same document at the same time, without overlap.
- **Communication tools:** Users collaborate via comments, instant messaging, or email while managers track progress via dashboard.
- **Dynamic numbers and narrative across reports:** When a number changes, numeric and narrative dynamically update across all the reports in which they appear. With built-in roll forward, load the latest data and reports and narratives update automatically.
- **Create standard reporting templates:** Package up formatting, fonts, logos and other standards into templates to ensure consistent usage across the organization. Formats include PDF, PPT, XLS, Word, XML, HTML and more.
- **Combine data from multiple sources:** Whether you’re using one data source or twenty, Collaborative Office integrates easily with existing systems to incorporate all of the information you need to produce your reports.
- **Easy audits:** With CCH Tagetik’s audit trail and audit log, track changes every step of the way, know the source of any number on a report and have full visibility into when a number was changed and by whom.

## For all your reporting needs:

### Internal Reports:

Board books, management reports, strategic plans, and budget books

### Financial Reports:

Financial statements, proxy statements, press releases, annual and quarterly reports including associated narrative and footnotes

### Management Reports:

Provide the business with decision-making reports, documents and presentations with complete confidence that the numbers used to drive decisions are the same ones used in approved financial statements and regulatory reports

### Regulatory Reports:

Period reports such as Comprehensive Financial Reports (CAFR), Comprehensive Capital and Analysis Review (CCAR) and industry specific requirements (Solvency II, IFRS) according to the regulatory requirements (US GAAP, IFRS)

## Why CCH Tagetik?

- **Finance Owned:** Purpose built to be maintained by Finance, reducing TCO and dependency on IT.
- **Unified CPM Solution:** Consolidation, Planning, Reporting and Disclosure in one solution.
- **Reliability:** Our implementation team consistently delivers.
- **Cloud without Compromise:** On premises. On cloud. One solution. The choice is yours.

Learn more about CCH Tagetik Collaborative Office

Sign up for a personalized demo at:

[www.tagetik.com/software/disclosure/collaborative-office](http://www.tagetik.com/software/disclosure/collaborative-office)

## About Wolters Kluwer | CCH Tagetik

Wolters Kluwer enables finance, legal, tax, and healthcare professionals to be more effective and efficient. We provide information, software, and services that deliver vital insights, intelligent tools, and the guidance of subject-matter experts. We understand the complex challenges that face the Office of the CFO and translate that knowledge into intuitive, enterprise-scale CCH® Tagetik performance management software solutions that drive business results. With over 180 years’ experience in the markets we serve, Wolters Kluwer is lifting the standard in software, knowledge, tools and education.