

Client Online Access Online Session

What is this session about?

This session is aimed at providing participants with knowledge and experience of how to enable and maintain a client's access to COA, and also understand the functionality from a client's perspective.

Who should attend this session?

- XPLAN users who will require to assist their clients on how to use XPLAN portals.

Time

Self-paced

Learning Outcome

After completing this session, participants should be able to:

- Enable COA for clients
- Manage COA
- Use Digital Signatures to set a document to be digitally signed by your client
- Use Widgets and Management Reports to manage COA clients
- Understand the functionality of COA from a client's perspective.

How do I register for this session?

This training requires no registration. Training is available now through the [IRESS Insights Community](#) as self-paced learning (eLearning).

** registration is required to access the Community*