

# Coding Essentials

## Supplementary Session

<b>What is this session about?</b>	<p>This session is aimed at providing participants with knowledge and experience required to commence coding documents, ranging from a basic letter to more complex documents. This is achieved through expert knowledge, hands-on applications, interactive exercises and real-life scenarios.</p> <p>This session provides an overview of Coding template documents, enabling participants to effectively create new templates as well as making changes to existing templates.</p>
<b>Who should attend this session?</b>	<ul style="list-style-type: none"><li>• Administrators</li><li>• Paraplanners</li><li>• System Administrators</li></ul>
<b>Pre Requisite</b>	<ul style="list-style-type: none"><li>• Completion of an XPLAN New User session.</li><li>• Good knowledge of Financial Planning concepts</li><li>• Understanding of the basic workings of the different XPLAN modules especially IPS &amp; XTOOLS+, Risk Researcher and WealthSolver</li></ul>
<b>Time</b>	<ul style="list-style-type: none"><li>• 1 day</li></ul>
<b>Learning Outcome</b>	<p>After completing this session, participants will be able to:</p> <ul style="list-style-type: none"><li>• Understand the basis for XPLAN coding</li><li>• Know where to find the XPLAN Template Library in HELP</li><li>• Use the XWord toolbar</li><li>• Code a basic letter</li><li>• Incorporate tables into documents</li><li>• Include information using 'if' and 'else' statements</li><li>• Include output from IPS, XTOOLS/XTOOLS+, Risk Researcher and WealthSolver</li><li>• Include Document Library output</li><li>• Know how to test and merge out documents</li></ul>
<b>How do I register for this session?</b>	<p>Contact your Account Executive or view the XPLAN Training Listing on our website.</p>