

# Group Data and Site Modification

## Online Course

**What is this course about?** This course aims to providing site administrators with the knowledge of setting up and managing an XPLAN site.

Focus is on system settings of advice modules and managing bulk data. You will also gain a high-level understanding of these advice modules of how they are used.

**Who should attend this course?**

- XPLAN users who need to set up and manage XPLAN sites such as Site Administrators

**Pre- Requisite** n/a

### Learning Outcome

After completing this course, participants will be able to:

- Understand the system settings available for advice modules
- Have a high-level understanding of the advice modules to understand the effect of system settings options such as Engage, Risk Researcher, WealthSolver, IPS
- Import and Export client data
- Import and Export Wizards
- Using Modify All

**How do I register for this course?** n/a – available as self-paced learning via eLearning