Session description Xplan Client Online Access Management

Online session

Sept 2019

iress

What is this session about?	This session is aimed at providing participants with knowledge and experience of configuring system settings and interface for Client Online Access (COA) in Xplan, and looking at the setup and management of individual accesses for their clients.
Who should attend this session?	• Any new Xplan users requiring to set up Xplan portals for their clients such as Administrators and Advisers.
Time	Self-paced
Learning Outcome	After completing this session, you should be able to: • Set up COA • Configure the COA interface • Enable COA for clients • Manage COA • Use Digital Signatures to set a document to be digitally signed by your client
How do I register for this session?	This training requires no registration. Training is available on demand through the Iress Community as eLearning. Please note, registration is required to access the Community.

Iress Training

No-one knows our software better than we do, and we really understand the specialist needs of financial services businesses like yours. We'll work with you to ensure everyone within your business is able to use the system effectively. We offer a wide choice of training options to suit everybody including role-based and module-based training, and a variety of delivery methods.

iress.com/support/training