Session description Xplan Group Data & Site Modification

Online session

Sept 2019

iress

What is this session about?	This session aims to provide 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 session?	• Site Administrators – who need to set up and manage Xplan sites
Time	Self-paced
Learning Outcome	After completing this session, you should 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 and Portfolio • Import and Export client data and wizards • Using Modify All functionality
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.

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