

Site Administration Supplementary Course

What is this course about?

This course is aimed at providing site administrators with knowledge of the administrative settings within XPLAN.

You will understand how to customise your XPLAN site to better meet your needs, and how to manage system settings and assumptions.

The course has been structured in a way that will provide you with a good understanding of XPLAN customisation capabilities and how these can be applied to your site.

Who should attend this course?

System Administrators

Prerequisites

- Basic Microsoft skills
- Good knowledge of Financial Planning concepts

Time:

Half day

Learning Outcomes:

After completing this course, participants will be able to:

- Manage new users
- Manage licenses and capabilities
- Create and administer groups
- Manage system assumptions
- Manage system settings
- Site customisation

How do I register for this course?

Contact your Account Executive or view the XPLAN Training Listing schedule on our website.