



WORKSHOPS

We would be happy to design a concept for an individual **workshop** together. Simply select your preferred focus from the following modules and create your own training package. Below you will find a list of the contents of the individual modules. The Asset Classes module, as well as all advanced modules, additionally offer you the possibility to select further content.

Good to know: Training materials (incl. tasks) are provided for each workshop.

Module Analytics Basic | Duration: 2 hours

After this module you will

- know the features of the software section Analytics,
- understand the role of presets in analyses and reports,
- you can make ad-hoc changes to existing analyses & add and remove metrics,
- you will be able to create simple analyses and understand basic concepts of creating correct analyses,
- you know how to share and manage presets in QPLIX.

Required QPLIX knowledge:

- Basic knowledge of basic functions and the structure of the software
- Basic knowledge of the Universe section

Content:

- Features of the analysis section
- Concept „Presets“
- Call up allocations and run live analyses
- Edit Presets
- Create new presets
- Share & manage presets



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Module Analytics Advanced | Duration: 3 hours

After this module you will

- know the connection between benchmarks, target allocations and performance attribution,
- be able create, configure and analyze your own benchmarks in the system,
- be able to create target allocations for individual legal entities,
- be able to independently perform analyses for strategic asset allocation and performance attribution.

Required QPLIX knowledge:

- Competent handling of presets (we offer basic seminars on this subject)
- Knowledge of "common properties"

Content:

- Creation, configuration and analysis of benchmarks
- Creation and analysis of target allocations
- Reproduction of report pages on Strategic Asset Allocation and Performance Attribution
- Using of the formula metric

Add-On: Analytics

- Analysis of common properties
- Working with grouping/linking (preset settings)
- Analysis of statements (mapping, chart of accounts)
- Analysis of transactions (Transaction Analytics)
- Working with time shifts and time periods



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Module Reporting Basic | Duration: 2 hours

After this module you will

- know all about the Reporting section and its key features,
- be able to generate reports from existing templates and share them via QPLIX,
- be able edit existing templates for reports,
- understand the importance of presets for report generation,
- be able to independently create simple report templates in QPLIX.

Required QPLIX knowledge:

- Basic knowledge of basic functions and the structure of the software
- Basic knowledge of the Universe section

Content:

- Introduction to QPLIX
- Features of the reporting section
- Understanding the concept of "preset"
- Generate reports based on existing report templates
- Creation and configuration of custom report pages

Add-On: Reporting Troubleshooting | Duration: Ca. 30 minutes

- Identify and resolve simple issues in reports



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Module Reporting Advanced | Duration: 3 hours

After this module you will

- have a deeper understanding of preset configuration possibilities,
- know about the usefulness of parameters in report generation,
- be able to create meaningful report pages,
- be able to independently create repeating page sequences ("iterations") and integrate them into your reports,
- be familiar with the application and configuration of matrices,
- know the possibilities of user-defined icons and further possibilities for visualization of outputs (e.g., performance, sustainability or others),
- know our best practice strategy for identifying errors in reports or configuring robust and low-maintenance reports.

Required QPLIX knowledge:

- Basic knowledge and application experience in the software section Reporting
- Competent handling of presets

Content:

- Introduction to QPLIX
- Useful features related to presets
- Iterator report element
- Content types matrix and rotated matrix
- Use of icons and visualization possibilities for columns / metrics
- Troubleshoot common issues in reports
- Best practice process for robust and easy-to-maintain reports