



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.

Complete package „All-round View“ | Duration: 4 hours

After this module you will

- know the history and the ambition of the QPLIX software as well as its core functions,
- know all about the various support options and how you can effectively help yourself while working with QPLIX,
- be able to navigate through the software and find the information you are looking for,
- understand the importance of the Universe as the software's primary investment universe and be able to independently create assets, legal entities, and ownership structures there
- have an overview of how accounting works in QPLIX
- be familiar with the transaction entry process in QPLIX and able to execute it manually,
- understand the functionality of presets in asset analytics and reporting and be able to independently configure presets for analysis purposes,
- be able to modify analyses and create simple analyses,
- be able to generate reports in QPLIX, edit existing reports and create simple report templates,
- know the portal as an interactive dashboard for digital asset reporting.

Required QPLIX knowledge:

- None
- Note: This course is particularly suitable for new employees who are coming in contact with QPLIX for the first time and should get an as comprehensive overview of all sections and functionalities as possible



WORKSHOPS

Complete package „All-round View“ | Duration: 4 hours

Content:

- Introduction to QPLIX
- Navigation and information searching in the software
- Concept of legal entities, ownership structures and securities as basis for mapping assets in QPLIX
- Functionality of accounting
- Transaction recording and transaction control
- Concept of presets and usage in Analytics and Reporting
- View and create simple analyses
- Generate and configure simple reports
- Introduction of the Client Portal