Admin Training Progress Tracker

Effectively track the progression of your self-guided learning and associated tasks to be completed as part of your initial system set up.

Use this tracker to:

- Keep track of your self-guided learning progress
- Track completed tasks and those still requiring action
- Note anything you need to follow up internally
- Note questions you have for Xeppo Support or Onboarding

Xeppo

Phase 1 – Users and Security Groups

Self-Paced Learning – Articles

Topics	Articles	Complete
Topic 1: Security (20-25 mins)	Xeppo Security Module: Overview	☐
	Steps to set up Security	☐
	Creating and Modifying Users & Teams	☐
	Create or Modify a Security Group	☐
	Manage Permissions	☐
	Impersonation	☐
	Grant Client Access to Xeppo	☐
	Terminology	☐
Topic 2: Security Permissions (10-15 mins)	Managing Security Group Users & Teams	☐
	Managing Core Capabilities	☐
	Managing App Capabilities	☐
	Managing Direct Permissions	☐
	Inherited Permissions	☐
Topic 3: Two-factor Authentication (2-5 mins)	Setting up Two-factor Authentication (2FA)	☐
	Managing Two-factor Authentication (2FA)	☐

Self-Paced Learning – Video & Webinars

Duration	Video	Complete
23 minutes	Users & Security Groups	☐

Setup Tasks

Tasks	Complete
Review security requirements for your practice and assess how you will apply these principles in Xeppo	☐
Configure default settings for the Practice user and Client user Security Groups	☐
Create new users in Xeppo - please refer to the Xeppo website for user pricing	☐
Set up Teams for key groups of staff if you require (eg. Accounting, Financial Planning, Admin etc)	☐
All users have set up two-factor authentication (2FA) and recorded their 2FA recovery codes somewhere safe	☐

Notes

Phase 2 - Admin Settings, Themes & Power BI

Self-Paced Learning – Articles

Topics	Articles	Complete
Topic 1: Settings & Theme (20-25 mins)	Theming your Xeppo Portal	☐
	Admin Settings Menu	☐
Topic 2: Xeppo Insights Power BI (20-25 mins)	Xeppo Insights Template App Installation and Configuration	☐

Self-Paced Learning – Video & Webinars

Duration	Video	Complete
13 minutes	Settings	☐

Setup Tasks

Tasks	Complete
Review your Xeppo portal Theme in the Admin menu and update if required	☐
Review and update Client Data settings in the Admin Settings menu	☐
Review and update Notification settings in the Admin Settings menu (if you have the relevant staff added into Xeppo as users)	☐
Review and update Client and Insurance Lookup Fields in the Admin Settings menu (if you will be updating these fields directly in Xeppo)	☐
Review and update Partner Relationships mapping in the Admin Settings menu (you will also need to revisit this setting once all connectors are enabled)	☐
Check prerequisites to install the Xeppo Insights for Power BI (if applicable to your practice)	☐
Log in to Power BI and install Xeppo Insights from the app store (subject to meeting prerequisites)	☐

Notes

Phase 3 - Connectors

Self-Paced Learning – Articles

Topics	Articles	Complete
Topic 1: Connectors General (45-50 mins)	Available Connectors	☐
	Create New Connector	☐
	Manage Connectors	☐
	Connect Field Priorities	☐
	Connector Status Updating	☐
	SFTP File Delivery using FileZilla	☐
Topic 2: Monitor Connectors (5-10 mins)	Monitor Connectors	☐

Setup Tasks

Tasks	Complete
For Connectors you require that connect using an API, create a connector(s)	☐
Enable Connectors that have been created to start ingesting data into Xeppo for your practice	☐
Provide information and action requests from Xeppo Onboarding that relate to the set up of your connectors - for example, fact finds	☐
Build reports in your source systems for SFTP file transfers - follow instructions from the Onboarding Team	☐

Notes

Phase 4 - Client Matching

Self-Paced Learning – Articles

Topic	Articles	Complete
Topic 1: Client Matching (60-70 mins)	Client Matching Overview	☐
	Client Auto Matching	☐
	Client Wizard Matching	☐
	Manual Matching Basics	☐
	Processing Unmatched Clients	☐
	Client Review Page	☐
	Merge Xeppo Codes	☐
	Inactive Source Client Deletion	☐

Self-Paced Learning – Video & Webinars

Duration	Video	Complete
20 minutes	Matching & Grouping	☐

Setup Tasks

Tasks	Complete
Match Clients in Xeppo using the Matching Wizard and Manual Matching	☐
Process unmatched clients - ensure you have exhausted all possible matches prior to processing unmatched clients	☐
Repeat the above steps to match additional records as more information is ingested from your source systems and/or more connectors are added	☐
Use the Client Review page to review your matching before moving on to the next Phase of training on Grouping	☐

Notes

Phase 5 - Grouping & Primary Contacts

Self-Paced Learning – Articles

Topics	Articles	Complete
Topic 1: Grouping (30-35 mins)	Client Grouping Overview	☐
	Auto Grouping	☐
	Group Review	☐
	Group Verification	☐
Topic 2: Primary Contacts (5-10 mins)	Primary Contacts	☐

Self-Paced Learning – Video & Webinars

Duration	Video	Complete
20 minutes	Matching & Grouping	☐

Setup Tasks

Tasks	Complete
Review grouping and provide feedback to Xeppo Onboarding if required	☐
Verify groups in Group Review	☐
Review Primary Contacts and provide feedback to Xeppo Onboarding if required	☐
Identify groups that do not have a primary contact and assign a primary contact for those groups	☐

Notes

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Phase 6 - Fee Categories & Tags

Self-Paced Learning – Articles

Topics	Articles	Complete
Topic 1: Fee Categories (10-15 mins)	Ranking by Fee Categories Overview	☐
	Building Fee Categories	☐
Topic 2: Tags (10-15 mins)	Introduction to Tags	☐
	Create a Tag	☐
	System Tags for Custom Fields	☐

Self-Paced Learning – Video & Webinars

Duration	Videos	Complete
16 minutes	Fee Categories	☐
18 minutes	Tags	☐

Setup Tasks

Tasks	Complete
Configure fee categories to reflect how revenue is grouped for your practice - either using a template (Xeppo can apply one for you) or configure from scratch	☐
Map uncategorised revenue to Fee Categories	☐
If you require System tags for custom fields, discuss this with the Onboarding Team	☐
Explore within your practice when tags may be of use, for example, a review month tag	☐
For tags you know you will require, set up the tags in Admin > Tools & Features > Tags	☐
You may choose to start tagging clients individually or in bulk if sufficient client data is available in Xeppo - the Xeppo Onboarding team can assist you in deciding when may be appropriate to start this if you are using tags	☐

Notes

Phase 7 - Data Management

Self-Paced Learning – Articles

Topics	Articles	Complete
Topic 1: Data Discrepancies (65-75 mins)	Data Discrepancies Overview	☐
	Ignore Data Discrepancies - Settings	☐
	Data Comparison Fields	☐
	Compare Client Records	☐
	Client Data Discrepancies - Viewing	☐
Topic 2: Change Requests (10-15 mins)	Creating a Change Request	☐

Self-Paced Learning – Video & Webinars

Duration	Videos	Complete
21 minutes	Data Discrepancies	☐
19 minutes	Change Requests	☐

Setup Tasks

Tasks	Complete
Review and configure Data Discrepancy Settings in Admin > Settings > Data Discrepancy Processing - this will need to be reviewed each time new connectors are added	☐
Start to review and address data discrepancies by:	☐
Update client information in your source systems to resolve discrepancies	☐
Discuss best practice to address data discrepancies with Xeppo Onboarding	☐
Investigate if/where bulk data imports to resolve discrepancies in your source systems may be useful (if available and warranted)	☐
Ignore data discrepancies that do not require action in a source system	☐

Notes

Phase 8 - Regular Tasks, Xeppo Core & Beyond

Self-Paced Learning – Articles

Topics	Articles	Complete
Topic 1: Important Regular Admin Tasks (30-40 mins)	Admin Callouts	☐
	Monitor Connectors	☐
	Monitor Security	☐
	Change Requests	☐
Topic 2: Xeppo Core (15-20 mins)	My Account Menu	☐
	Searching	☐
	Group Page Overview	☐
	Client Page Overview	☐
	Introduction to Views	☐
	Dashboards	☐

Self-Paced Learning – Video & Webinars

Duration	Video	Complete
70 minutes	Xeppo Core	☐

Setup Tasks

Tasks	Complete
Allocate responsibility of regular Admin tasks within your practice - processing of unmatched clients, data discrepancies, fee categories, change requests and monitoring connectors	☐
Allocate responsibility of Admin tasks relating to security - regular reviews of users and user permissions, security groups and teams	☐
Check status of connectors and connector priorities and follow up with Xeppo if needed	☐
Follow up on any source systems that are not yet connected	☐
Review all settings in Admin > Settings to see if any changes are needed	☐
Get to know Xeppo along with the Xeppo Core video	☐

Notes