

Course : IPS SQL Advanced Administrator

- 9:30 **Registration & Introduction**
- 9:45 Advanced Case Admin Features
- **Trading**
 - Invoices posting
 - Cash & Allocations
 - Purchase Orders
 - Entry, Printing, Converting to Invoice
 - **Progress Report Production**
 - Note templates used
 - How to get accrued costs entered
 - How to deal with consigned funds
 - **Debt Recovery**
 - Entry of debtors using Excel
 - Capturing open item sales ledger
 - Using Adjust/Write off facility
 - Flagging invoices with debt collection tags
 - Report generation
 - **Using Excel to update contacts in IPS**
 - Capture initial data
 - Update at later stage
- 11:30 **Coffee Break**
- 11:45 Use of Excel in Reporting
- Saving reports as Excel files
 - Exporting data to Excel
 - Linking Excel & IPS together to produce bespoke reports
- 12:30 Grid Manipulation
- Adding/Removing columns
 - Resizing Grid
 - Sorting
 - Filtering Data
 - Creating column totals
 - Saving layouts

- 13:00 **Lunch**
- 14:00 IPS Security Basics
- IPS Users, groups and membership
 - Security policies
 - Action log
 - Adding/Amending policies
 - Change/Action Log
- 14:30 Teams
- Creation of Teams
- Team dashboard
- Adding teams to cases
- Effect of teams on diary entries
- 15:00 Lookup Data
- Lookup list
 - IP's link with security system
 - Bonding date based premiums
 - Ordering
 - Bank Branches
 - Note Templates
- 15:30 **Break**
- 15:45 Diary Templates
- Amending existing templates
 - Creating new templates
 - Copying existing
 - Modifying
 - Date calculations
 - Adding months and years
 - Using the working day function
 - Assigning actions to diary lines
- 16:45 Q&A
- 17:00 **Finish**