




USER MANUAL

**SUPPLY, DESIGN, DEVELOPMENT,
INSTALLATION, TESTING,
COMMISSIONING AND MAINTENANCE OF
REGISTRATION SOFTWARE
FOR
FEDERATION OF INVESTMENT
MANAGERS MALAYSIA (FIMM)**

**MODULE: CONTINUING PROFESSIONAL
DEVELOPMENT (CPD)
(APPRENTICE PROGRAM)
GROUP: DISTRIBUTOR**


AGENCY NAME	:	FEDERATION OF INVESTMENT MANAGERS MALAYSIA (FIMM)
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DOCUMENT DESCRIPTION


This document is prepared to explain how to use the FCS system. This user manual explains the functions and step by step how to use the system completely to the users involved.

Document Information	
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ACRONYM

ACRONYM	DESCRIPTION
AAR	Alternate Authorized Representative
AMLCFT	Anti-Money Laundering/Combating the Financing of Terrorism
AMSF	Annual Membership Subscription Fee
AR	Authorized Representative
AUM	Asset Under Management
BOD	Board of Directors
CAS	Consultant Alert
CEILLI	Certificate Examination in Investment-Linked Life Insurance
CEO	Chief Executive Officer
CFP	Certified Financial Planner
ChFC	Chartered Financial Consultant
CMSRL	Capital Market Services Representative License
CPD	Continuing Professional Development
CPRA	Corporate Private Retirement Scheme Adviser
CPRE	Computerized Private Retirement Scheme Examination


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CSD	Corporate Services Division
CUTA	Corporate UTS Adviser
CUTE	Computerized Unit Trust Examination
DMS	Document Management Storage
FIMM	Federation of Investment Managers Malaysia
FMS	Funds Malaysia System
GM	General Manager

ACRONYM	DESCRIPTION
HOD	Head of Department
ID	Industry Development
IFP	Islamic Financial Planner
IPRA	Institutional Private Retirement Scheme Adviser
ISD	Industry Services Division
IUTA	Institutional Unit Trust Scheme Adviser
KYC	Know Your Customer
LRA	Legal and Regulatory Affairs
MOF	Ministry of Finance
NAV	Net Asset Value
NRIC	National Registration Identity Card


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OTP	One Time Password
PDS	Professional Development and Services
PRC	Private Retirement Scheme Consultant
PRP	Private Retirement Scheme Provider
PRS	Private Retirement Scheme
R&A	Research and Analytics
RD	Registration Department
RFP	Registered Financial Planner
RSD	Regulatory Services Division
SC	Security Commission Malaysia
SRFP	Shariah Registered Financial Planner
SRS	System Requirement Specification
ACRONYM	DESCRIPTION
SD	Supervision Department
UML	Unified Modelling Language
UTC	Unit Trust Consultant
UTMC	Unit Trust Management Company
UTS	Unit Trust Scheme
OR	Official Receipt

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CN	Credit Note
IDD	Integration Design Document


Table 1: Acronym Table

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ABBREVIATIONS ROLE

Abbreviation	DESCRIPTION
C-CON	Consultant
D-CPD-MKR	CPD - Maker
D-CPD-CHK	CPD - Approver
F-PDSU	FIMM PDS User

Table 2: Abbreviation Role Table

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CHAPTER 1: INTRODUCTION

The **FCS System User Manual** is designed to provide users with a comprehensive guide to effectively utilizing the **FCS system**. This manual serves as a reference document to help users understand the system's functionalities, features, and processes to ensure smooth operation and efficient task completion.

By following the instructions in this manual, users will be able to navigate the system with ease, perform necessary actions, and troubleshoot common issues. The manual is structured to accommodate both new and existing users, offering clear step-by-step guidance for system access and usage.

Purpose

The purpose of this manual is to equip users with the essential knowledge required to maximize the benefits of the **FCS system**. It provides:

- **A detailed overview of the system's functions and capabilities** to help users understand its key features.
- **Step-by-step instructions** on accessing and operating the system efficiently.
- **Guidelines on alternative modes of operation and contingencies** in case of system issues or errors.
- **Best practices and recommendations** for optimal system use.

This manual ensures that users can confidently navigate the system while maintaining security, accuracy, and efficiency in their tasks.


Contact Information

If users require further assistance or encounter any issues while using the **FCS system**, they can contact the **Federation of Investment Managers Malaysia (FIMM)** for support.

Support Contact Details:

Email: itsupport@fimm.com.my

Website: <http://www.fimm.com.my>

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CHAPTER 2: GENERAL SYSTEM INSTRUCTION

2.1 User Log in

The FCS system application is accessible only to registered users. Each user will be provided with a unique User ID and password to log in securely.

To access the system, users must navigate to the **main login page** ([Insert URL]) and enter their credentials. For first-time users, an initial login setup may be required to activate their accounts.

For security reasons:


- Users should keep their login credentials confidential.
- Passwords should be changed periodically to enhance security.
- In case of forgotten credentials, users can use the **"Forgot Password?"** option to reset their password.

Steps to Open the FCS System Website:

1. **Launch your web browser** (Google Chrome, Mozilla Firefox, Microsoft Edge, etc.)
2. **Enter the FCS System URL** in the address bar and press **Enter**.
3. The **login page** will appear, allowing users to enter their credentials.

2.1.1 Log in

Access the Login Page

1. On the homepage, locate the 'Log in'  button and click it.
2. In the **User ID** field, enter your registered **User ID**.
3. In the **Password** field, enter your **password**.

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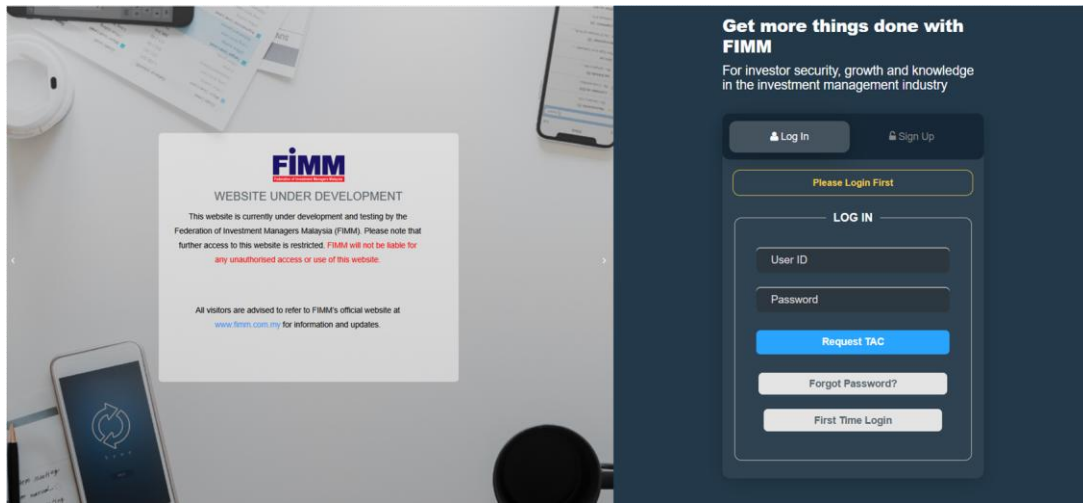


Diagram 1: FCS Homepage Display

Enter Your Credentials

- System will show sign in page, User need to insert this item
 - User ID
 - Password
 - TAC

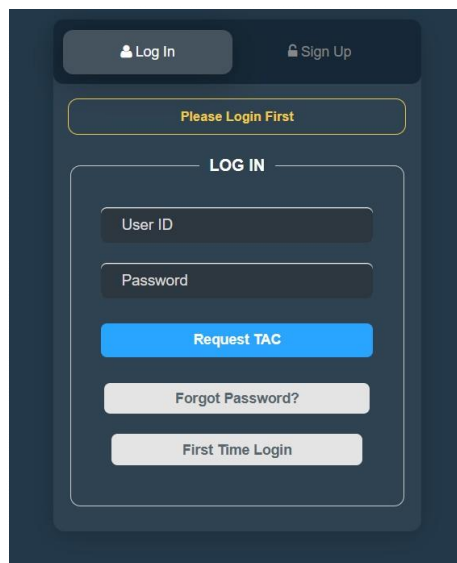



Diagram 2: Log in Display

Successful Login

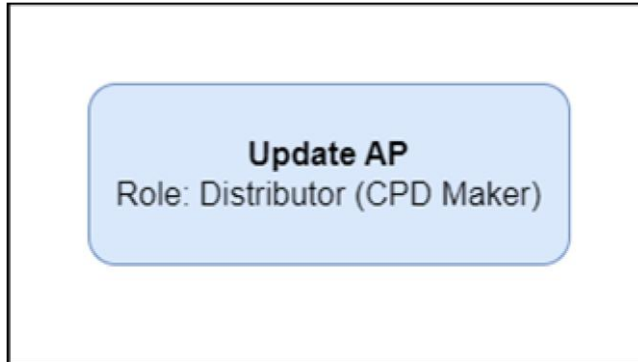
- Click **Login** button and the system will be redirected to the FCS System dashboard.


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3.6 Apprenticeship Program

3.6.1 Submit AP Training Report

3.6.1.1 Process Flow



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3.6.1.2 Manual Step

Update AP

1. Click menu Continuing Professional Development. System will display submenu under Continuing Professional Development.

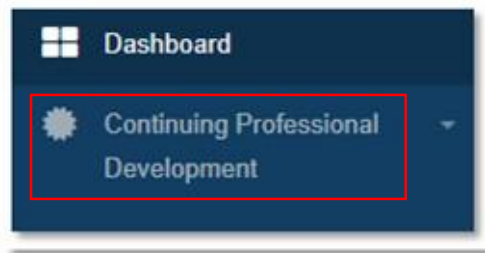


Diagram 138: Menu

2. Click submenu Apprentice Program.

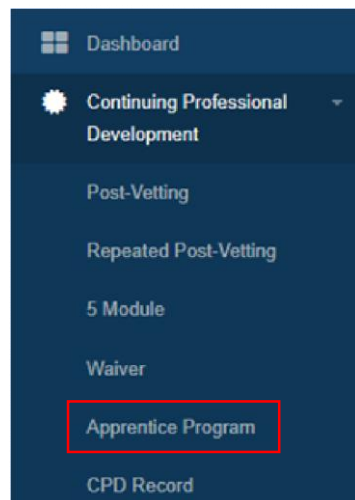


Diagram 139: Submenu


3. System will show List of Apprentice Program.

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The screenshot displays the FIMM Apprenticeship Program interface. On the left is a sidebar with navigation links: Dashboard, Continuing Professional Development, Post-Vetting, Repeated Post-Vetting, 5 Module, Waiver, Apprenticeship Program (selected), and CPD Record. Below these are links for Profile, Logout, and a copyright notice. The main content area is titled 'Apprentice Program' and includes a breadcrumb trail: FIMM > CPD > Apprentice Program. Below the breadcrumb is a search form with fields for Name, NRIC/Passport No, FIMM No, AP Status (a dropdown menu), and AP Expiry Date (a date picker). There are 'Reset' and 'Find' buttons. Below the search form is a table with 10 columns: NO., NAME, NRICPASSPORT NO, FIMM NO, AP STATUS, AP COMMENCEMENT DATE, AP EXPIRY DATE, CMSRL NO, and ACTION. The table contains 10 rows of data. At the bottom of the table, it says 'Showing 1 to 10 of 43 entries' and there are pagination controls: Previous, 1, 2, 3, 4, 5, Next.

NO.	NAME	NRICPASSPORT NO	FIMM NO	AP STATUS	AP COMMENCEMENT DATE	AP EXPIRY DATE	CMSRL NO	ACTION
1	Lim Ai Ching	Y2345678	F01001066				162815	
2	Ahmad Zaki	A11122201	F01001091				FIMM1231	
3	PROD CONS 4	801020010004	F01001123	Expired	23-Feb-2023	31-Dec-2024		
4	Karthik A/L Subramaniam (W)	910123456789	F01001079	Complete	17-Feb-2025	31-Dec-2026	020319	
5	PROD CONS 5	801020010005	F01001125	Active	23-Feb-2025	31-Dec-2026		
6	Siva Raj	Z3456789	F01001080	Active	15-Nov-2024	31-Dec-2026		
7	Dev Anand	L34567890	F01001206					
8	Hafsa binti Mohd	980303215678	F02001198	Active	23-Feb-2025	31-Dec-2026		
9	Harith bin Faiz	981210056789	F01001199	Active	19-Feb-2025	31-Dec-2026		
10	Priya Thiagarajan	F56789012	F02001200	Active	15-Nov-2024	31-Dec-2026	1214235	

Diagram 140: List of Apprentice Program

4. User can filter the list by either one or more of and click  :
- Name
 - NRIC/ Passport No
 - FIMM No
 - AP Status
 - AP Expiry Date

The screenshot shows the filter section of the FIMM Apprenticeship Program interface. It includes a search form with fields for Name, NRIC/Passport No, FIMM No, AP Status (a dropdown menu), and AP Expiry Date (a date picker). There are 'Reset' and 'Find' buttons. The entire filter section is highlighted with a red border.

Diagram 141: Filter

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5. User click  to clear the filter.

Apprentice Program

FIMM > CPD > Apprentice Program

Name NRIC/Passport No FIMM No

AP Status AP Expiry Date

-- Choose -- dd/mm/yyyy













 

Diagram 142: Reset

6. User can choose total entries to display per page.

Show entries

NO	NAME	NRIC/PASSPORT NO	FIMM NO	AP STATUS	AP COMMENCEMENT DATE	AP EXPIRY DATE	CMSRL NO	ACTION
1	Lim Ai Ching	Y2345678	F01001066				162815	
2	Ahmad Zaki	A11122201	F01001091				FIMM1231	
3	PROD CONS 4	801020010004	F01001123	Expired	23-Feb-2023	31-Dec-2024		
4	Karthik A/L Subramaniam (W)	910123456789	F01001079	Complete	17-Feb-2025	31-Dec-2026	020319	
5	PROD CONS 5	801020010005	F01001125	Active	23-Feb-2025	31-Dec-2026		
6	Siva Raj	Z3456789	F01001080	Active	15-Nov-2024	31-Dec-2026		
7	Dev Anand	L34567890	F01001206					
8	Hafsah binti Mohd	980303215678	F02001198	Active	23-Feb-2025	31-Dec-2026		
9	Harith bin Faiz	981210056789	F01001199	Active	19-Feb-2025	31-Dec-2026		
10	Priya Thiagarajan	F56789012	F02001200	Active	15-Nov-2024	31-Dec-2026	1214235	

Showing 1 to 10 of 43 entries

Previous [1](#) [2](#) [3](#) [4](#) [5](#) Next

Diagram 143: Filter Total Entries

7. System will show number of entries at the bottom of the list.

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Show entries

NO	NAME	NRIC/PASSPORT NO	FIMM NO	AP STATUS	AP COMMENCEMENT DATE	AP EXPIRY DATE	CMSRL NO	ACTION
1	Lim Ai Ching	Y2345678	F01001066				162815	
2	Ahmad Zaki	A11122201	F01001091				FIMM1231	
3	PROD CONS 4	801020010004	F01001123	Expired	23-Feb-2023	31-Dec-2024		
4	Karthik A/L Subramaniam (W)	910123456789	F01001079	Complete	17-Feb-2025	31-Dec-2026	020319	
5	PROD CONS 5	801020010005	F01001125	Active	23-Feb-2025	31-Dec-2026		
6	Siva Raj	Z3456789	F01001080	Active	15-Nov-2024	31-Dec-2026		
7	Dev Anand	L34567890	F01001206					
8	Hafsah binti Mohd	980303215678	F02001198	Active	23-Feb-2025	31-Dec-2026		
9	Harith bin Faiz	981210056789	F01001199	Active	19-Feb-2025	31-Dec-2026		
10	Priya Thiagarajan	F56789012	F02001200	Active	15-Nov-2024	31-Dec-2026	1214235	

Showing 1 to 10 of 43 entries

Previous **1** 2 3 4 5 Next

Diagram 144: Total Entries

8. System will show pagination at the bottom of the list. User click on the numbers and system will show the listing on the next page.

Show entries

NO	NAME	NRIC/PASSPORT NO	FIMM NO	AP STATUS	AP COMMENCEMENT DATE	AP EXPIRY DATE	CMSRL NO	ACTION
1	Lim Ai Ching	Y2345678	F01001066				162815	
2	Ahmad Zaki	A11122201	F01001091				FIMM1231	
3	PROD CONS 4	801020010004	F01001123	Expired	23-Feb-2023	31-Dec-2024		
4	Karthik A/L Subramaniam (W)	910123456789	F01001079	Complete	17-Feb-2025	31-Dec-2026	020319	
5	PROD CONS 5	801020010005	F01001125	Active	23-Feb-2025	31-Dec-2026		
6	Siva Raj	Z3456789	F01001080	Active	15-Nov-2024	31-Dec-2026		
7	Dev Anand	L34567890	F01001206					
8	Hafsah binti Mohd	980303215678	F02001198	Active	23-Feb-2025	31-Dec-2026		
9	Harith bin Faiz	981210056789	F01001199	Active	19-Feb-2025	31-Dec-2026		
10	Priya Thiagarajan	F56789012	F02001200	Active	15-Nov-2024	31-Dec-2026	1214235	


Showing 1 to 10 of 43 entries

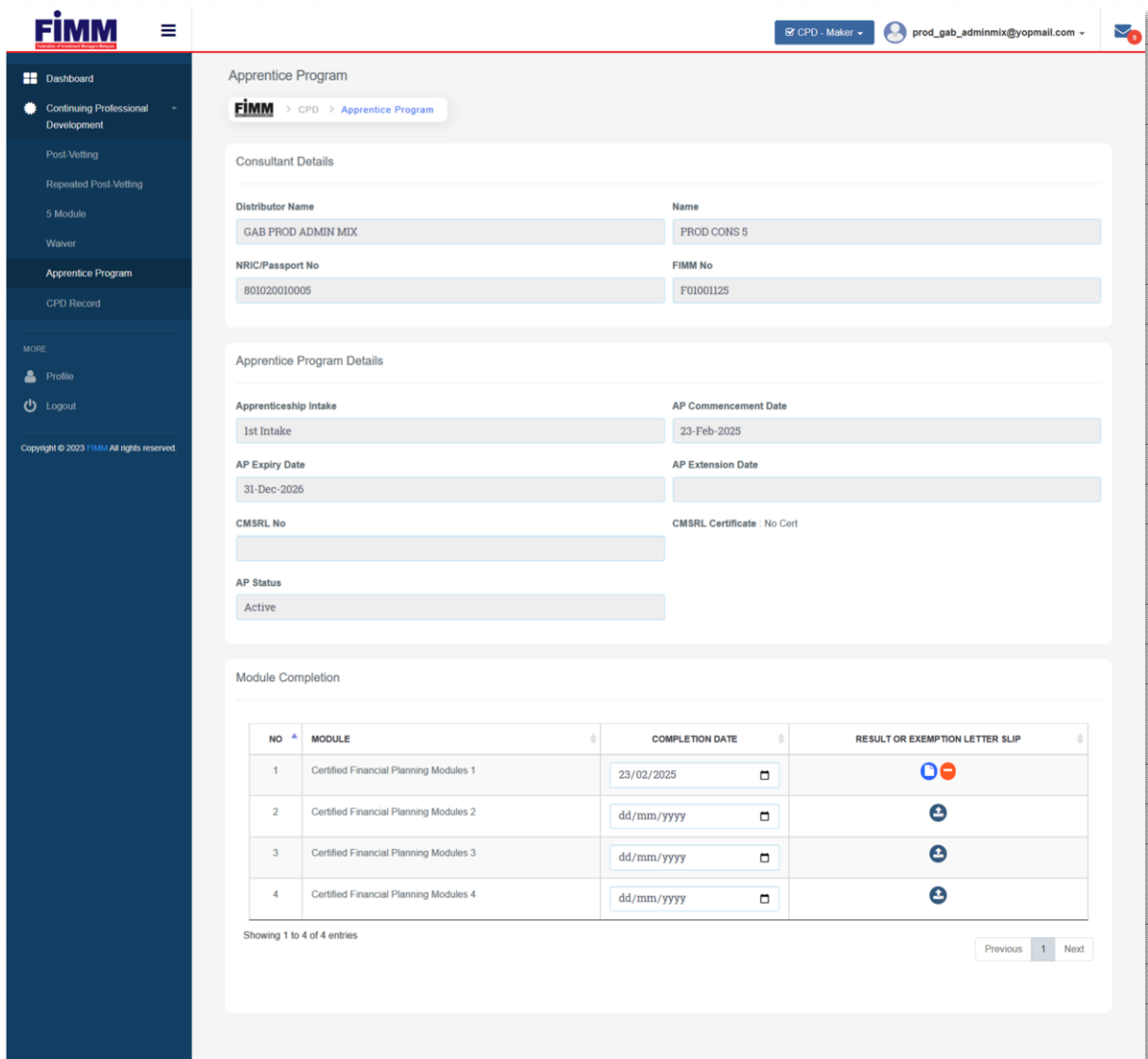
Previous **1** 2 3 4 5 Next

Diagram 145: Pagination

9. Under column Action, this button will be available if:

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- i. If the current date falls within June 30 – July 9 or December 31 – January 9 (a 10-day period) this button will only be visible for records with a Complete, Expired or - status.
10. Under column Action, this button  will be enabled if:
 - i. If the current date falls within June 30 – July 9 or December 31 – January 9 (a 10-day period) this button will only be visible for records with an Active status.
 - ii. For other periods, this button will not be displayed.
11. System will display the consultant AP details.



FIMM ≡ CPD - Maker prod_gab_adminmix@yopmail.com 1

Apprentice Program

Consultant Details

Distributor Name: GAB PROD ADMIN MIX Name: PROD CONS 5

NRIC/Passport No: 801020010005 FIMM No: F01001125

Apprentice Program Details






Apprenticeship Intake: 1st Intake AP Commencement Date: 23-Feb-2025

AP Expiry Date: 31-Dec-2026 AP Extension Date:

CMSRL No: CMSRL Certificate: No Cert

AP Status: Active

Module Completion

NO	MODULE	COMPLETION DATE	RESULT OR EXEMPTION LETTER SLIP
1	Certified Financial Planning Modules 1	23/02/2025	 
2	Certified Financial Planning Modules 2	dd/mm/yyyy	
3	Certified Financial Planning Modules 3	dd/mm/yyyy	
4	Certified Financial Planning Modules 4	dd/mm/yyyy	

Showing 1 to 4 of 4 entries Previous 1 Next

Diagram 146: Form Apprentice Program

- i. Consultant Details

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- a) Distributor Name
- b) Name
- c) NRIC/ Passport No
- d) FIMM No

ii. Apprentice Program Details

- a) Apprenticeship Intake
- b) AP Commencement Date
- c) AP Expiry Date
- d) AP Extension Date
- e) CMSRL No
- f) CMSRL Certificate
- g) AP Status

iii. Module Completion. User can update the details.






- a) Completion Date
- b) Result or Exemption Letter Slip

Notes:

- Distributor can only update if AP meet these conditions;
Status is Active and current date is 30 June or 31 Dec.
System will open for Distributor to update for 10 days.

- iv. User click  to upload file.

Module Completion

NO	MODULE	COMPLETION DATE	RESULT OR EXEMPTION LETTER SLIP
1	Certified Financial Planning Modules 1	23/02/2025	 
2	Certified Financial Planning Modules 2	dd/mm/yyyy	
3	Certified Financial Planning Modules 3	dd/mm/yyyy	
4	Certified Financial Planning Modules 4	dd/mm/yyyy	


Showing 1 to 4 of 4 entries

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Diagram 147: Form Apprentice Program

v. System will display a popup.

- a) Upload
 - Upload File

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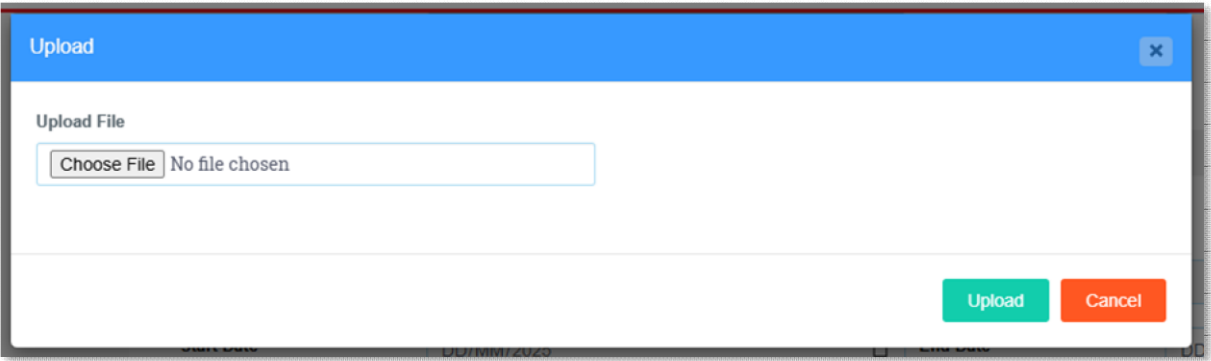


Diagram 148: Upload

- Cancel

Upload

vi. User

click to cancel upload and

close the

page.

vii. User click to

upload new file.

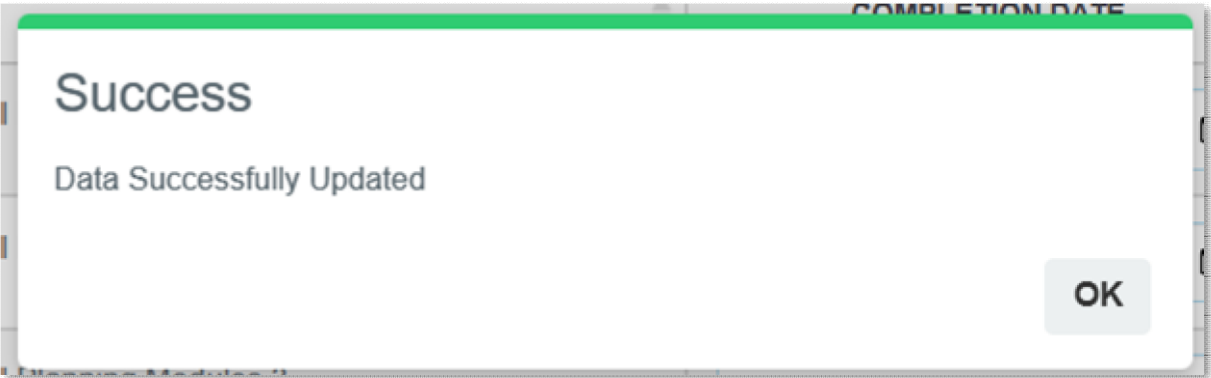


Diagram 149: Popup Message

- viii. System will display error message if the file exceeds 2 MB.

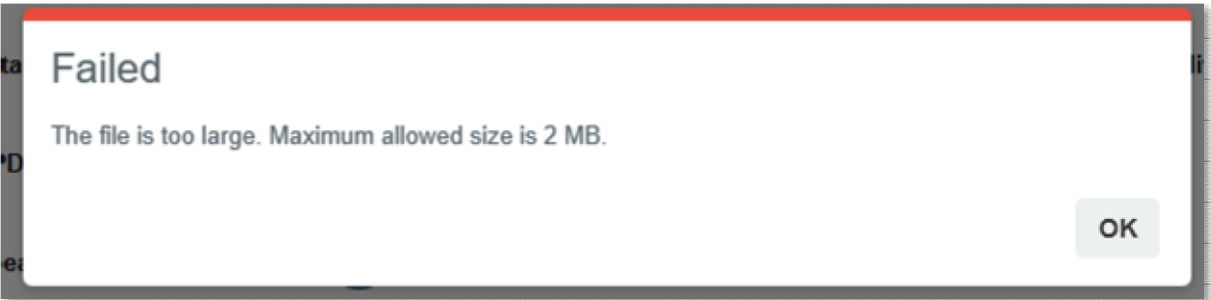


Diagram 150: Error Message