




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)
(PROGRAM CANCELLATION)
GROUP: DISTRIBUTOR**


AGENCY NAME	:	FEDERATION OF INVESTMENT MANAGERS MALAYSIA (FIMM)
DOCUMENT DATE	:	10/04/2025
DOCUMENT VERSION	:	V1.1

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	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	i

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

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Table 2: Abbreviation Role Table xvi


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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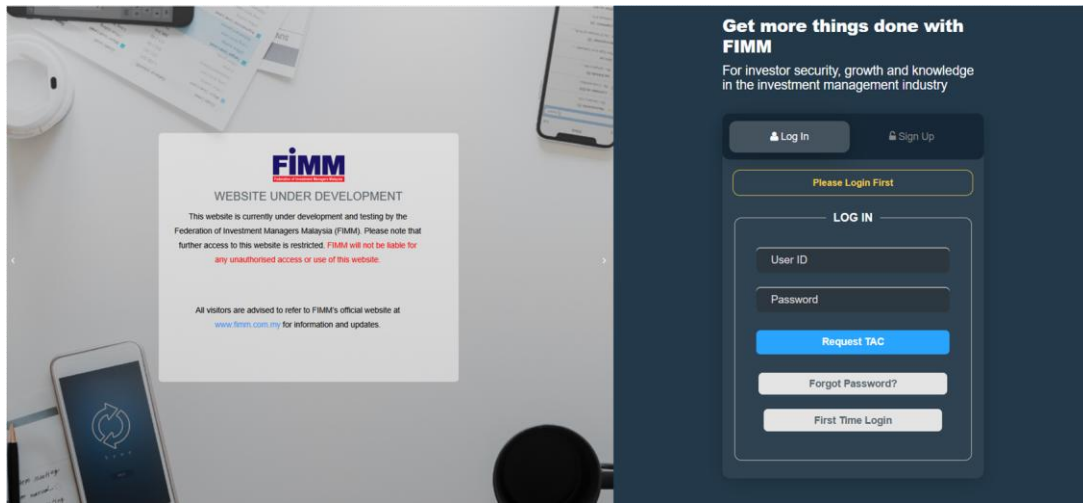


Diagram 1: FCS Homepage Display

Enter Your Credentials

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

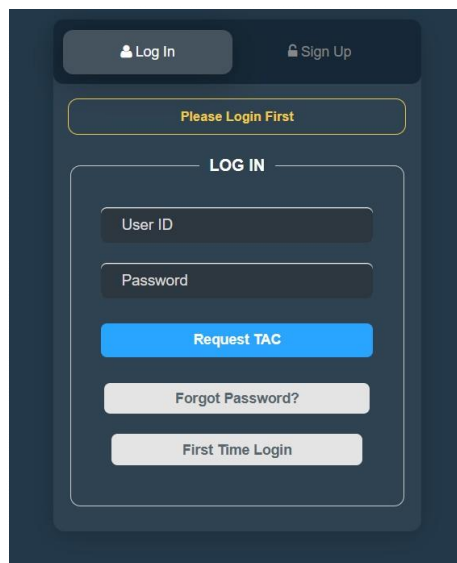



Diagram 2: Log in Display

Successful Login

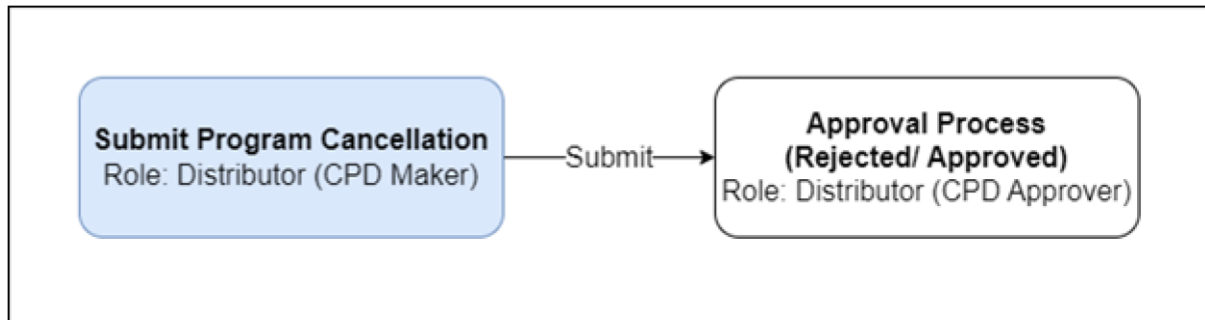
5. Click Login button and the system will be redirected to the FCS System dashboard.


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3.7 Program Cancellation

3.7.1 Submit Program Cancellation

3.7.1.1 Process Flow



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3.7.1.2 Manual Step

Cancel Program

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

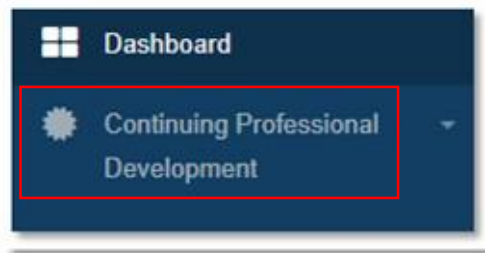


Diagram 151: Menu

2. Click submenu Post-Vetting.

Notes:

This manual covers cancellation process for Post-Vetting but it is also applicable to Repeated Post-Vetting.

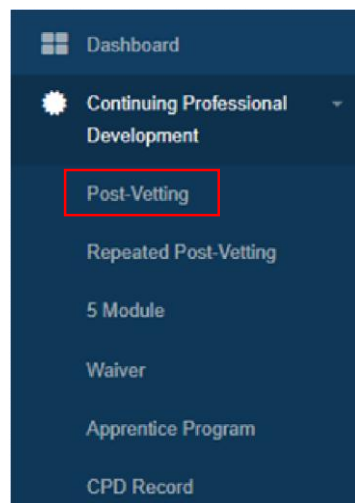


Diagram 152: Submenu

3. System will show List of Post-Vetting.

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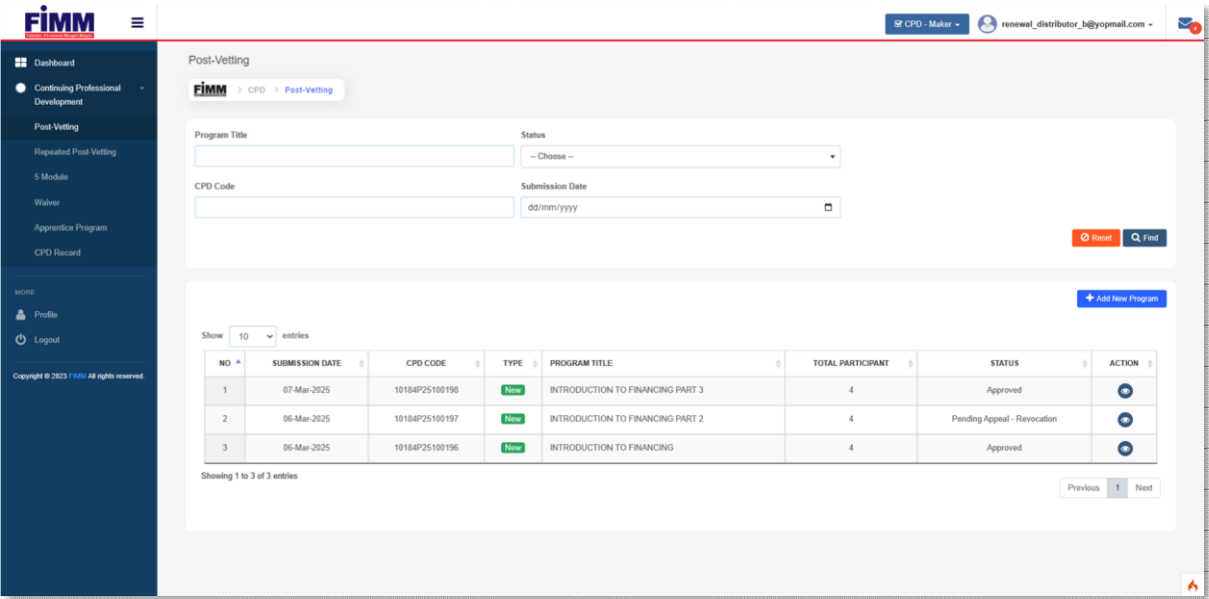


Diagram 153: List of Post-Vetting

4. Under column Action, user click .

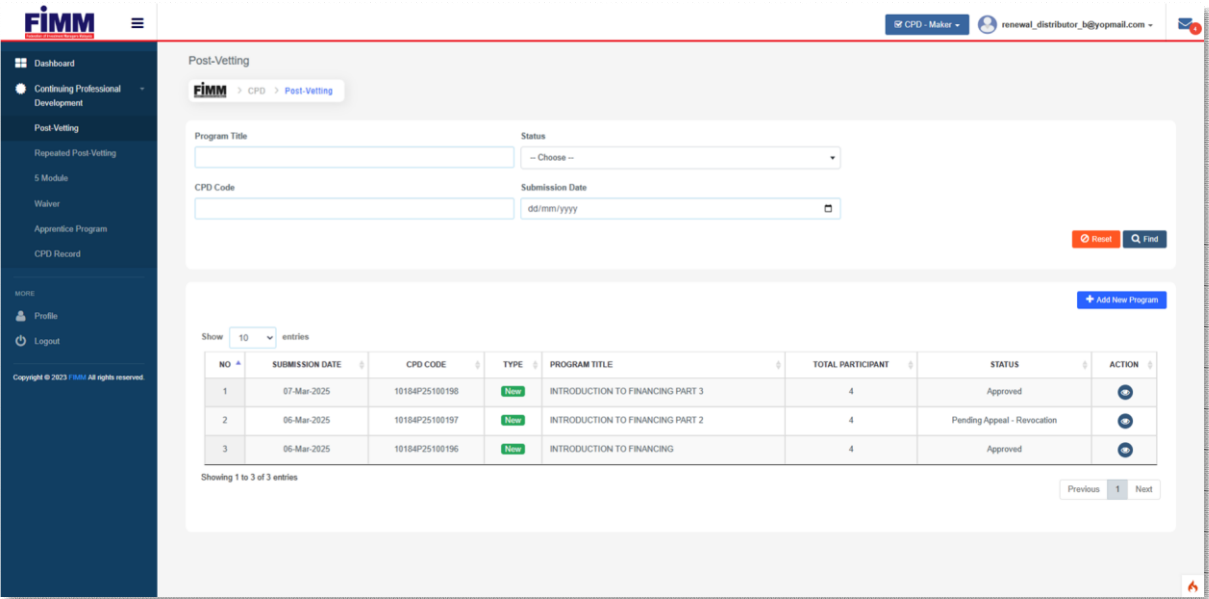



Diagram 154: List of Post-Vetting

5. System will display the program details.

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Dashboard

Continuing Professional Development

Post-Vetting

Repeated Post-Vetting

5 Module

Waiver

Apprentice Program

CPD Record

HOME

Profile

Logout

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Post-Vetting

FIMM

> CPD > Post-Vetting

Details

Log

1 Program Details

2 Participant Details

Distributor Details

Distributor Name

RENEWAL DISTRIBUTOR B

Email Address

RENEWAL_DISTRIBUTOR_B@YOPMAIL.COM

Distributor Code

10184

Contact Number

8975642

Submitted By

SITI MAISARAH BINTI MAHMUD

Program Details

New Program

Program Title

INTRODUCTION TO FINANCING PART 3

Start Date

06/03/2025

End Date

06/03/2025

Session

FULL DAY

Venue

KLCC

Total Hours

8.0

Mode of Delivery

PHYSICAL TRAINING PROGRAMMES (FACE TO FACE)...

CPD Point

8

Speakers

NO	NAME	PROFILE
1	FADZILAH	Module 1.pdf

Required Information

Upload File

NO	FILE	ACTION
1	Module 1.pdf	

Additional Information

NO	FILE	ACTION
1	Module 1.pdf	

Back

Cancel Program

Next >>

Diagram 155: Form Post-Vetting

6. User click


Cancel Program

 to cancel the program.

Confirm to proceed?

YES

NO

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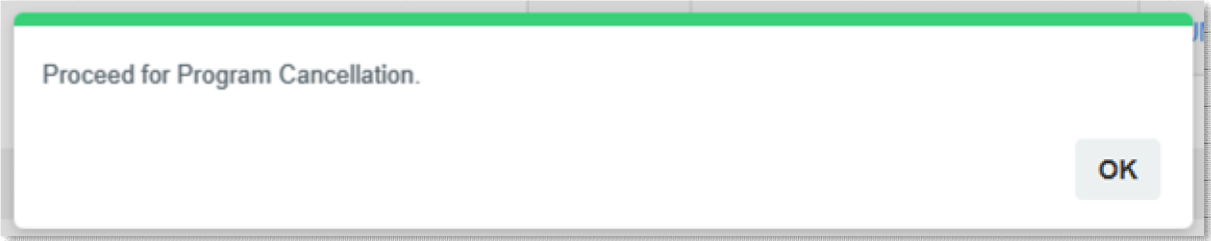


Diagram 156: Popup Message

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7. System will bring to another form. User fill in details:

i. Program Cancellation Details

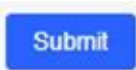
a) Reason


b) Upload Supporting Document

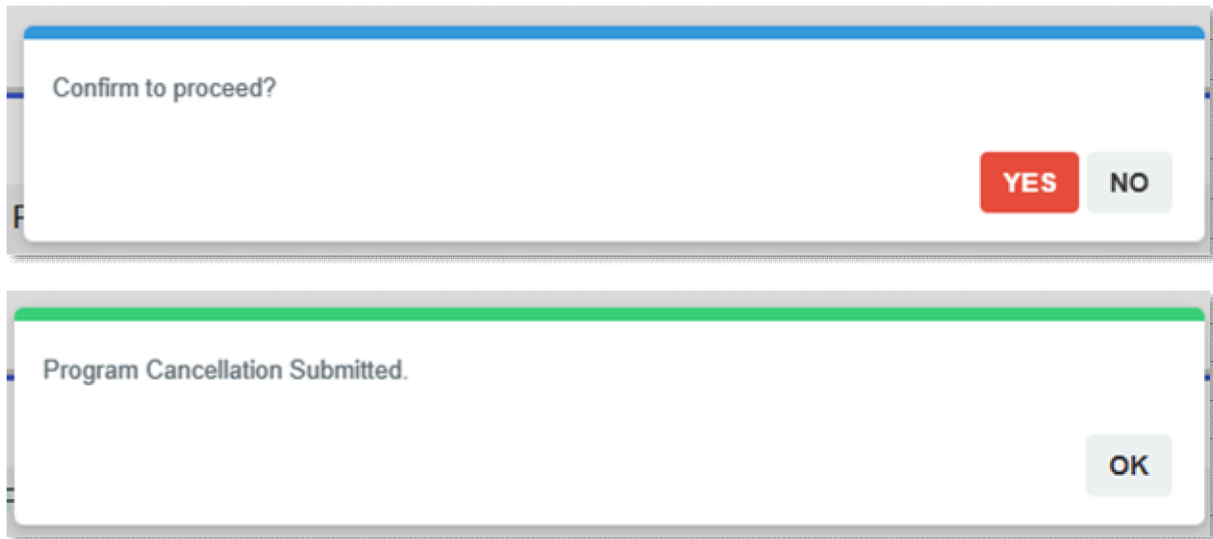
The screenshot shows the FIMM Post-Vetting interface. The left sidebar contains navigation links: Dashboard, Continuing Professional Development, Post-Vetting, Repeated Post-Vetting, 5 Module, Waiver, Apprentice Program, and CPD Record. The main content area is titled 'Post-Vetting' and includes a 'Details' tab and a 'Log' button. The form is divided into several sections:

- Distributor Details:** Includes fields for Distributor Name (RENEWAL DISTRIBUTOR B), Email Address (RENEWAL_DISTRIBUTOR_B@YOPMAIL.COM), Distributor Code (10184), Contact Number (8975642), and Submitted By (SITI MAISARAH BINTI MAHMUD).
- Program Details:** Includes a 'New Program' button, Program Title (INTRODUCTION TO FINANCING PART 3), Start Date (06/03/2025), End Date (06/03/2025), Session (FULL DAY), Venue (KLCC), Total Hours (8.0), Mode of Delivery (PHYSICAL TRAINING PROGRAMMES (FACE TO FACE)), and CPD Point (8).
- Speakers:** A table with columns NO, NAME, and PROFILE. It lists one speaker: 1, FADZILAH, with a link to 'Module 1.pdf'.
- Required Information:** A table with columns NO, FILE, and ACTION. It lists one file: 1, Module 1.pdf, with an 'ACTION' button.
- Program Cancellation Details:** This section is highlighted with a red box. It includes a 'Reason' text area and an 'Upload Supporting Document' button.

Diagram 157: Form Program Cancellation

ii. User click  to submit the application to Distributor Approver.

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Confirm to proceed?

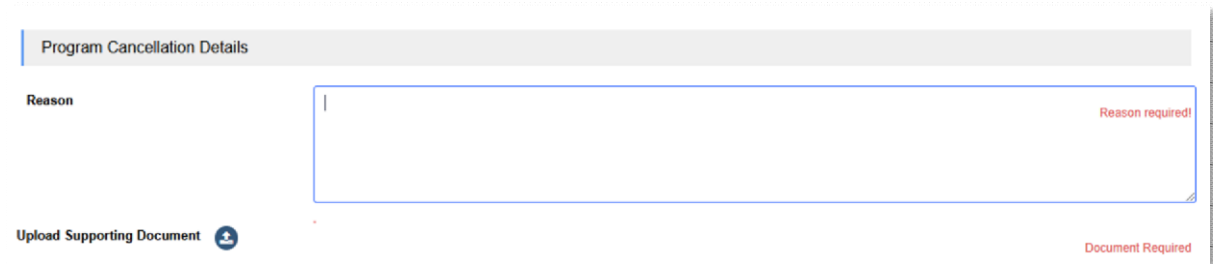
YES NO

Program Cancellation Submitted.

OK

Diagram 158: Popup Message

- iii. System will display validation if mandatory field is not fill in.



Program Cancellation Details

Reason


Reason required!

Upload Supporting Document

Document Required

Diagram 159: Form Program Cancellation

View Application and Log

8. In List of Post-Vetting, user can view application status. User click .

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The screenshot shows the FIMM Post-Vetting interface. On the left is a sidebar with navigation options: Dashboard, Continuing Professional Development, Post-Vetting, Repeated Post-Vetting, 5 Module, Waiver, Apprentice Program, and CPD Record. The main area is titled 'Post-Vetting' and contains a search form with fields for Program Title, Status (dropdown), CPD Code, and Submission Date (calendar icon). Below the form is a table with 3 entries. The table has columns: NO, SUBMISSION DATE, CPD CODE, TYPE, PROGRAM TITLE, TOTAL PARTICIPANT, STATUS, and ACTION. The entries are for 'INTRODUCTION TO FINANCING PART 3' and 'INTRODUCTION TO FINANCING PART 2'.

NO	SUBMISSION DATE	CPD CODE	TYPE	PROGRAM TITLE	TOTAL PARTICIPANT	STATUS	ACTION
1	07-Mar-2025	10184P25100198	New	INTRODUCTION TO FINANCING PART 3	4	Pending Approval - Cancellation	
2	06-Mar-2025	10184P25100197	New	INTRODUCTION TO FINANCING PART 2	4	Pending Appeal - Revocation	
3	06-Mar-2025	10184P25100196	New	INTRODUCTION TO FINANCING	4	Approved	

Diagram 160: List of Post-Vetting

9. System will display:
 - i. Tab Details
 - ii. Tab Log (Log history of the application):


The screenshot shows the FIMM Post-Vetting Log interface. At the top, there are two tabs: 'Details' and 'Log'. The 'Log' tab is selected and highlighted with a red box. Below the tabs is a table with 5 entries. The table has columns: Date, Process, From, Status, and Remarks. The entries show the history of the application, including steps like 'D-CPD-MKR', 'D-CPD-CHK', 'F-PDSU', and 'D-CPD-MKR'.

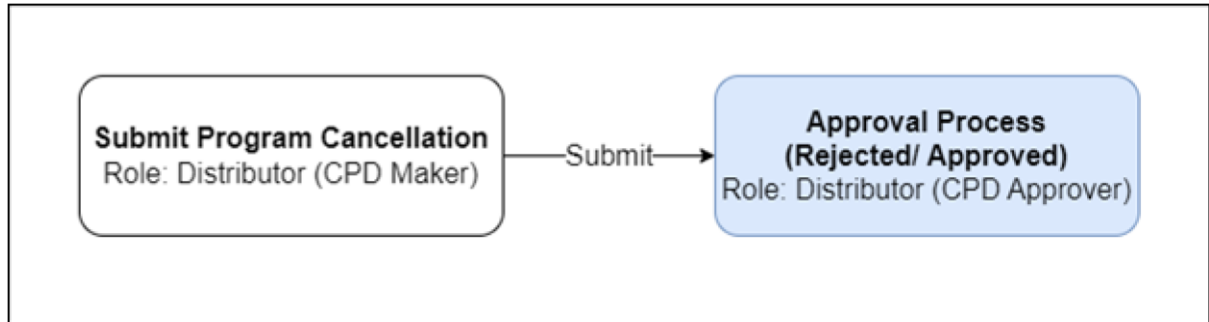
Date	Process	From	Status	Remarks
07-Mar-2025 08:25:34	D-CPD-MKR → D-CPD-CHK	SITI MAISARAH BINTI MAHMUD	Pending Approval - Cancellation	-
07-Mar-2025 08:24:56	D-CPD-MKR	SITI MAISARAH BINTI MAHMUD	Pending Program Cancellation	-
07-Mar-2025 08:23:49	F-PDSU → F-PDSU, D-CPD-MKR	Danial Tester Staging	Approved	ok
07-Mar-2025 08:23:14	D-CPD-MKR → F-PDSU	SITI MAISARAH BINTI MAHMUD	Pending Approval	-
07-Mar-2025 08:05:49	D-CPD-MKR	SITI MAISARAH BINTI MAHMUD	Draft	-


Diagram 161: Log

3.7.2 Approval Process by Distributor Approver

3.7.2.1 Process Flow

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3.7.2.2 Manual Step

Approval Process

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

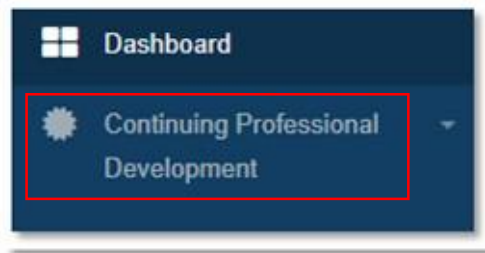


Diagram 162: Menu

2. Click submenu Post-Vetting.

Notes:

This manual covers cancellation process for Post-Vetting but it is also applicable to Repeated Post-Vetting.

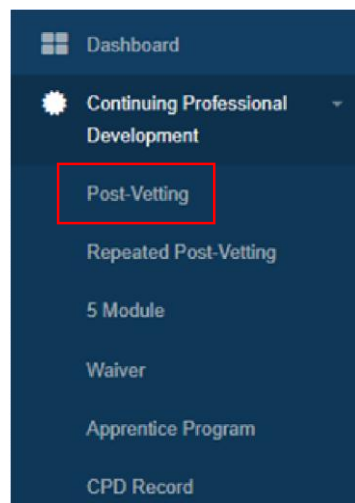


Diagram 163: Submenu

3. System will show List of Post-Vetting.

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The screenshot shows the FIMM Post-Vetting interface. On the left is a sidebar with navigation links: Dashboard, Continuing Professional Development, Post-Vetting, and Repeated Post-Vetting. The main content area is titled 'Post-Vetting' and includes a breadcrumb 'FIMM > CPD > Post-Vetting'. Below the breadcrumb are search filters for Program Title, Status, CPD Code, and Submission Date. A table displays a list of entries with columns: NO, SUBMISSION DATE, CPD CODE, TYPE, PROGRAM TITLE, TOTAL PARTICIPANT, STATUS, and ACTION. The first three entries are highlighted with a red border.

NO	SUBMISSION DATE	CPD CODE	TYPE	PROGRAM TITLE	TOTAL PARTICIPANT	STATUS	ACTION
1	07-Mar-2025	10154P25100198	New	INTRODUCTION TO FINANCING PART 3	4	Pending Approval - Cancellation	
2	06-Mar-2025	10154P25100197	New	INTRODUCTION TO FINANCING PART 2	4	Pending Appeal - Revocation	
3	06-Mar-2025	10154P25100196	New	INTRODUCTION TO FINANCING	4	Approved	

Diagram 164: List of Post-Vetting

4. In List of Post-Vetting under column Action, click



with approval status Pending Approval – Cancellation.

This screenshot is identical to the previous one, but the first entry in the table (row 1) is highlighted with a red border, indicating it is the selected item for the next step.

Diagram 165: List of Post-Vetting

5. System will display details that has been submitted.

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Post-Vetting

Details | Log

1 Program Details

2 Participant Details

Distributor Details

Distributor Name: RENEWAL DISTRIBUTOR B | Email Address: RENEWAL_DISTRIBUTOR_B@YOPMAIL.COM

Distributor Code: 10184 | Contact Number: 8975642

Submitted By: SITI MAISARAH BINTI MAHMOD

Program Details

New Program

Program Title: INTRODUCTION TO FINANCING PART 3

Start Date: 06/03/2025 | End Date: 06/03/2025

Session: FULL DAY | Venue: KLCC

Total Hours: 8.0 | Mode of Delivery: PHYSICAL TRAINING PROGRAMMES (FACE TO FACE/...)

CPD Point: 8

Speakers

NO	NAME	PROFILE
1	FADZILAH	Module 1.pdf

Required Information

Upload File

NO	FILE	ACTION
1	Module 1.pdf	

Additional Information

NO	FILE	ACTION
1	Module 1.pdf	

Program Cancellation Details

Reason: Request to cancel this program

Upload Supporting Document


NO	FILE	ACTION
1	Module 1.pdf	

Remark

Back | Reject | Approve | Next >>

Diagram 166: Form Program Cancellation

- i. Tab Details
 - a) Program Cancellation Details
- ii. Tab Log (Log History of the application)

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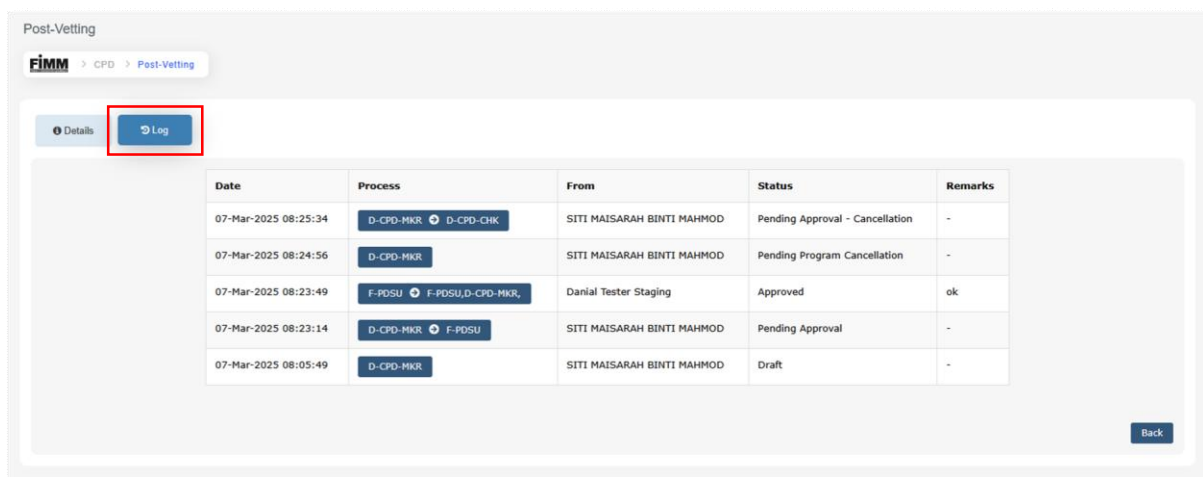


Diagram 167: Log

- iii. User click  to reject the cancellation.

Notes:

Field Remark is mandatory.

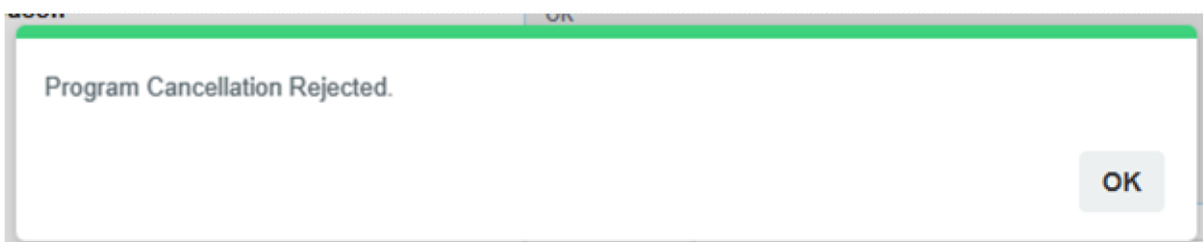
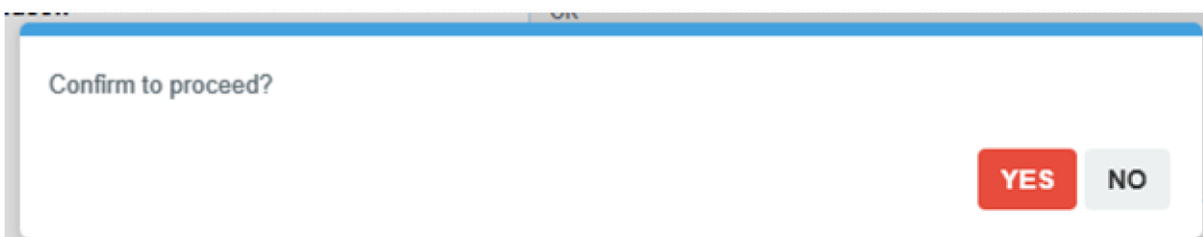
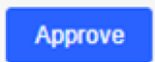



Diagram 168: Popup Message

- iv. User click  to approve the cancellation.

Notes:

Field Remark is mandatory.

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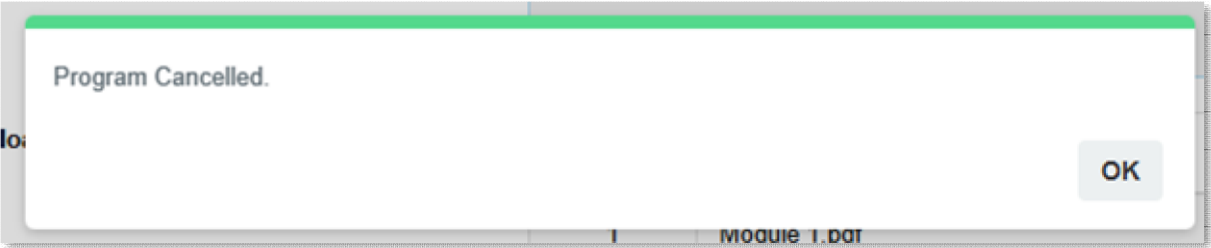
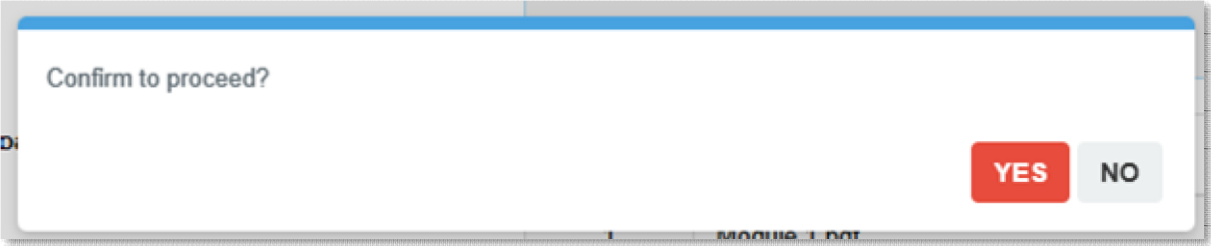


Diagram 169: Popup Message