



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) GROUP: TRAINING PROVIDER

AGENCY NAME	:	FEDERATION OF INVESTMENT MANAGERS MALAYSIA (FIMM)
DOCUMENT DATE	:	10/03/2025
DOCUMENT VERSION	:	V1.1

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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	
Project Name	SUPPLY, DESIGN, DEVELOPMENT, INSTALLATION, TESTING, COMMISSIONING AND MAINTENANCE OF REGISTRATION SOFTWARE FOR FEDERATION OF INVESTMENT MANAGERS MALAYSIA (FIMM)
Document Name	User Manual
Document Reference No	ZANKO/FIMM/UM/v0.1
Property	Zanko Sdn Bhd
Document Date	24/03/2025

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DOCUMENT CONTROL

Version History			
Version No	Version Date	Summary	Writer
0.1	24/02/2025		1. Nur Hidayah Bt Azirid 2. Norfadzilah Bt Mohd Radzi
1.0	24/03/2025	Final Document	1. Nur Hidayah Bt Azirid 2. Norfadzilah Bt Mohd Radzi
1.1	10/04/2025	Update to Document	1. Muzahar Mohd Mukhtar

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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
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

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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
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

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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
CN	Credit Note
IDD	Integration Design Document

Table 1: Acronym Table

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ABBREVIATIONS ROLE

Abbreviation	DESCRIPTION
F-PDSU	FIMM PDS User
F-PDSA	FIMM PDS Approver
T-TPU	TP - User
T-ADM	TP - Administrator

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** (<https://fcs.fimm.com.my>) 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.

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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**.

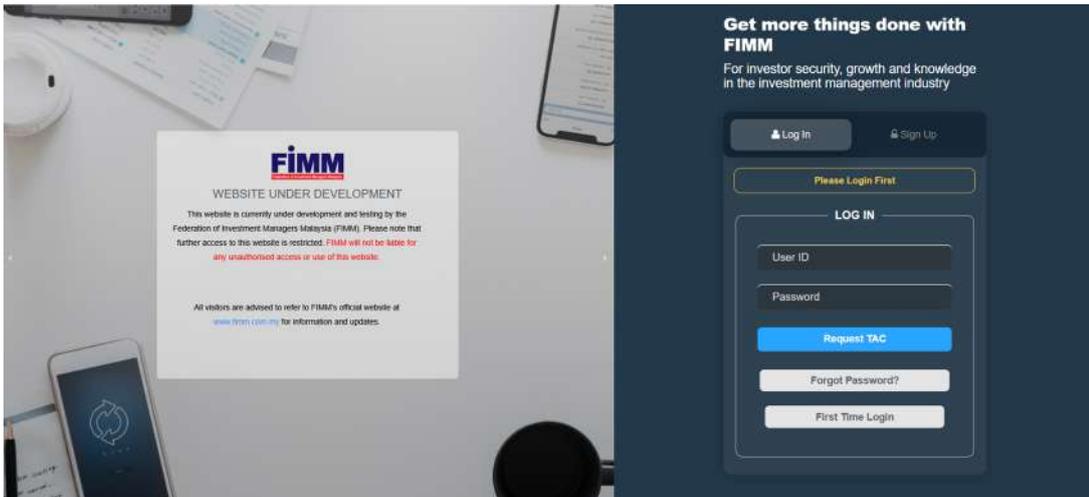


Diagram 1: FCS Homepage Display

Enter Your Credentials

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

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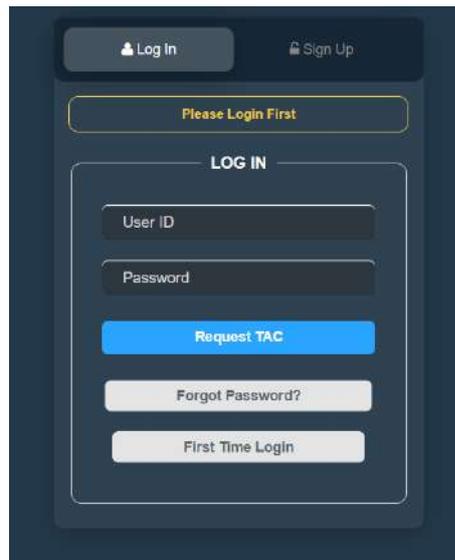


Diagram 2: Log in Display

Successful Login

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



Diagram 3: User Dashboard

- If log in not successful, the system will display an error message.

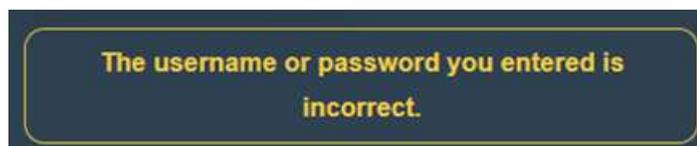


Diagram 4: Incorrect User Id and Password Message Display

- User need to re-enter id, password or verification and click  button.
- If user still cannot log in to the system. Please call system administrator.

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2.1.2 Update Account and Password

Update Account

1. Click icon at the far right of the system. The system will display Profile update submenu.

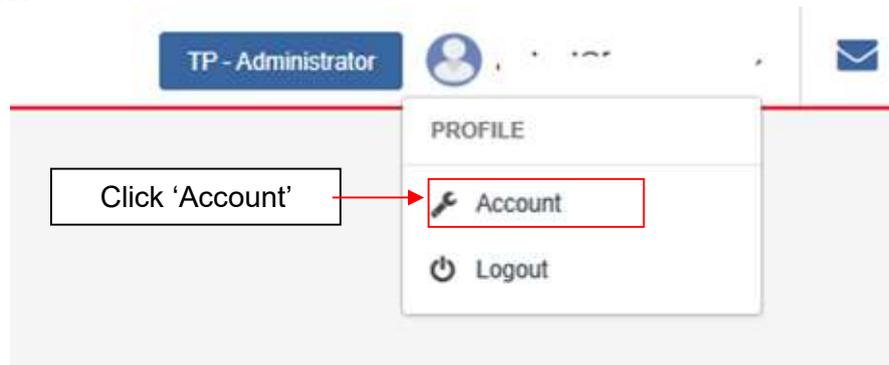
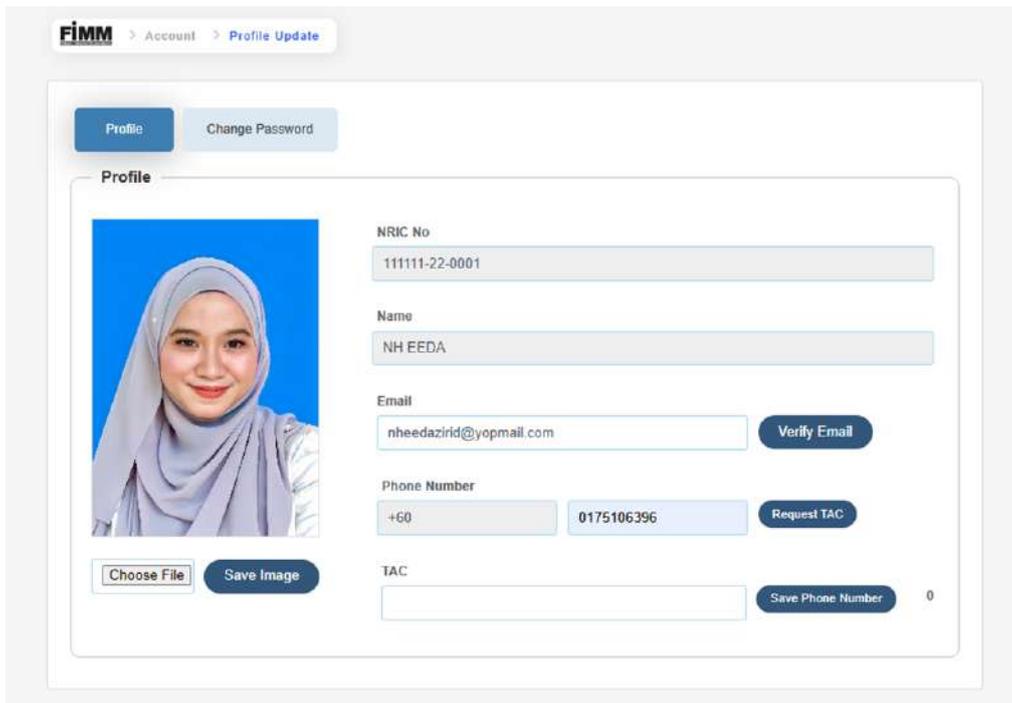


Diagram 5: Profile Submenu

2. Click 'Account' and system will show profile update page.
 - i. User can update the following information
 - Profile Picture
 - Email
 - Phone Number (Request TAC)
 - TAC number
 - ii. Click **Save Image** button and system will update profile picture.
 - iii. Click **Verify Email** button and system will send email verification to your email.
 - iv. Click **Save Phone Number** button and system will update the phone number.

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The screenshot shows the 'Profile Update' page with the 'Profile' tab selected. The user's profile information is displayed as follows:

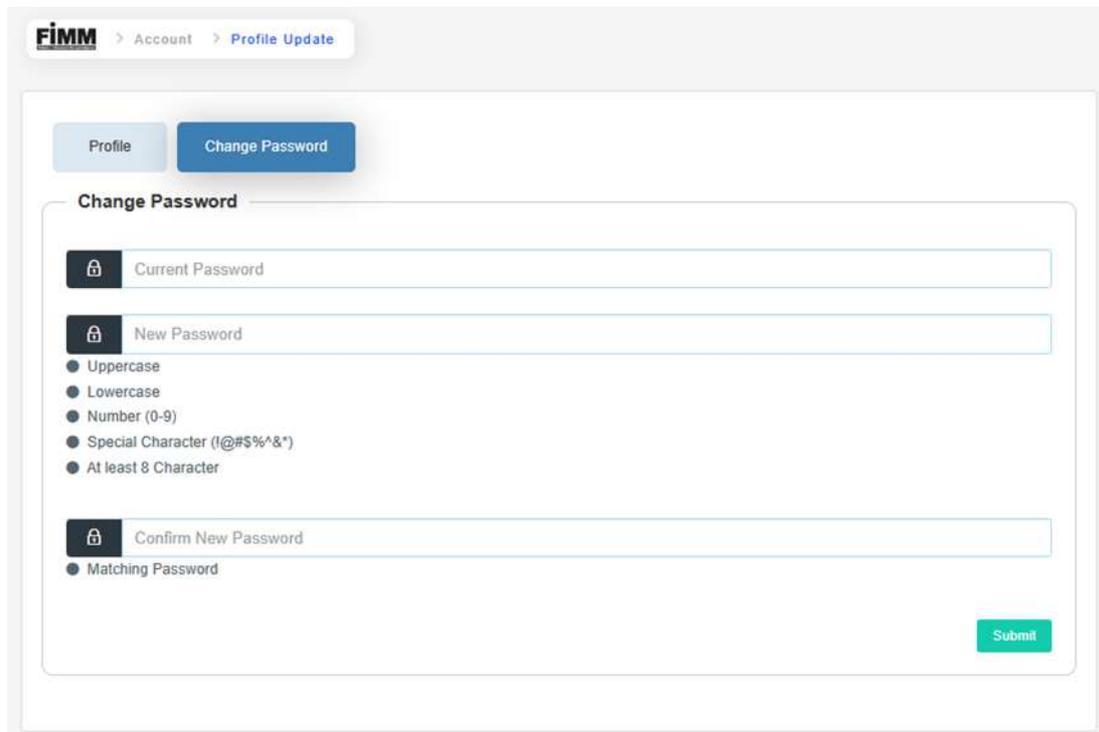
- Profile:** A photo of a woman wearing a hijab.
- NRIC No:** 111111-22-0001
- Name:** NH EEDA
- Email:** nheedazird@yopmail.com (with a 'Verify Email' button)
- Phone Number:** +60 0175106396 (with a 'Request TAC' button)
- TAC:** (with a 'Save Phone Number' button)

Additional buttons include 'Choose File' and 'Save Image' for the profile picture.

Diagram 6: My Profile Display

Update Password

3. Click 'Change Password' at account page. System will display Change Password page.



The screenshot shows the 'Change Password' page with the 'Change Password' tab selected. The form contains the following fields and requirements:

- Current Password:** A text input field with a lock icon.
- New Password:** A text input field with a lock icon. Requirements:
 - Uppercase
 - Lowercase
 - Number (0-9)
 - Special Character (!@#%*&')
 - At least 8 Character
- Confirm New Password:** A text input field with a lock icon. Requirement: Matching Password.

A green 'Submit' button is located at the bottom right of the form.

Diagram 7: Reset Password Page

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a. User can insert information

- Current Password
- New Password
- Confirmation New Password

b. Click  button to update new password.

- i. If the entered password does not meet the format, the system will display error message.



Diagram 8: Error Message Display

- ii. If the current password entered is not the same, the system displays an error message.

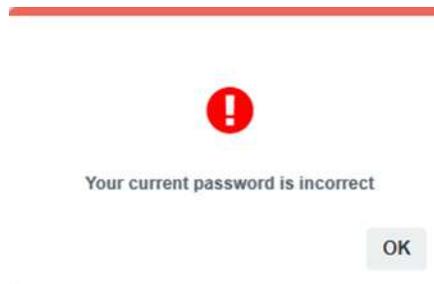


Diagram 9: Error Message Display

- iii. If the password is successfully updated, the system displays a notification message.

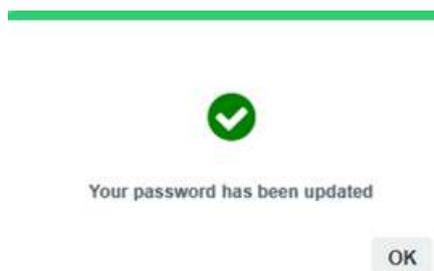


Diagram 10: Successful Message Display

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2.1.3 Forgot Password

1. Click 'Forgot Password'



Diagram 11: Log In Display

2. The system will display the 'Forgot Password' page. The user needs to enter their User ID and click  button.



The screenshot shows a 'Forgot Password' page with a title bar and a close button. It features a 'User ID' label above an input field containing the placeholder text 'Please enter your user ID'. Below the input field is a small note: 'Please enter the NRIC/Passport number without any dashes or spaces for consultant'. At the bottom right of the page is a blue 'Submit' button.

Diagram 12: Forgot Password Page

3. If the User ID exists, the system will display a notification message and send an email verification link to the registered email

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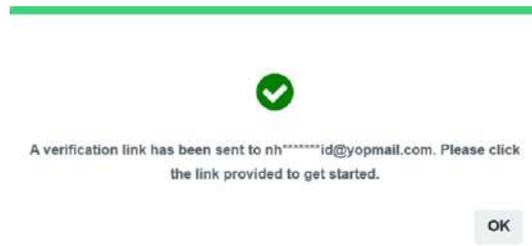


Diagram 13: Notification Message Display

4. User will receive a password reset email and needs to click on 'Here' to proceed.



Diagram 14: Email Reset Password

5. The system will display the 'Reset Password' page. The user needs to enter:

- New Password
- Confirm Password

6. Click button and the user will be logged in with the new password.

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Please reset your password

Reset Password

🔒 Password
👁️

- ✖ Uppercase
- ✖ Lowercase
- ✖ Number (0-9)
- ✖ Special Character (!@#%*&*)
- ✖ At least 8 Character

🔒 Confirm Password
👁️

- ✖ Matching Password

Submit

Back

Diagram 15: Reset Password Page

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2.1.4 Multiple Role

1. Click the role icon at the far right of the system. If the user has multiple roles, the system will display a list of available roles. The user can select the preferred role.



Diagram 16: Change Role

2.1.5 Log Out

1. Click the icon at the far right of the system. The system will display the Profile submenu.
2. Click 'Logout'. The system will redirect the user to the portal.

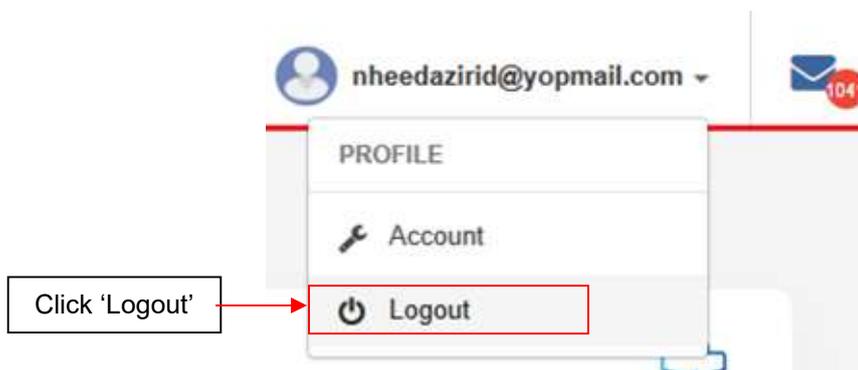


Diagram 17: Logout

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2.2 Dashboard

2.2.1 Pending Task

1. Click the 'Dashboard' menu. The system will display the Dashboard page.
2. Dashboard will show the user's Pending Tasks. User clicks the Action button, and the system will display the Pending Application Task page.

The screenshot shows the FIMM Dashboard with several task cards and a 'TO DO LIST' table. The task cards include: Post-Vetting (0), Repeated Post-Vetting (0), 5 Module (0), Waiver (0), Update Distributor Details (0), Cessation / Withdrawal (0), Suspension / Revocation (0), Divestment (3), Extension of Time (0), Request Exemption (1), and Appeal for Suspension / Revocation (0).

TO DO LIST

Show 10 entries

NO	APPLICATION DATE	APPLICATION TYPE	STATUS	ACTION
1	19-Sep-2024	Request Exemption	Draft	

Showing 1 to 1 of 1 entries

Previous 1 Next

Diagram 18: Dashboard

2.2.2 Dashboard Notification

1. Click the notification icon at the far right of the system. The system will display the list of notification message.

The screenshot shows a notification icon in the top right corner, highlighted with a red box and a callout box that says 'Click 'Notification icon''. Below the icon is a 'Notifications' dropdown menu with three notifications:

- D-MKR** 19-Feb-2025
Coverage Period Expired
Divestment_UTMTC (100074). Your indemnity insurance coverage period has expired. Please renew or contact your representative to proceed.
- D-MKR** 18-Feb-2025
Coverage Period Expired
Divestment_UTMTC (100074). Your indemnity insurance coverage period has expired. Please renew or contact your representative to proceed.
- D-MKR** 18-Feb-2025
Coverage Period Expired
Divestment_UTMTC (100074). Your indemnity insurance coverage period has expired. Please renew or contact your representative to proceed.

Diagram 19: Dashboard Notification

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CHAPTER 3: Continuing Professional Development (CPD) MODULE

The **CPD Management Module (M05)** is part of the **Federation of Investment Managers Malaysia (FIMM) Registration System** and is designed to facilitate and regulate the **Continuing Professional Development (CPD)** activities for industry professionals. It ensures compliance with training requirements, manages program approvals, and tracks CPD points.

Sub-Modules of the CPD Management Module :

1. Pre-Vetting

- Approves CPD programs before they are conducted.
- Evaluates program content, speakers, and supporting documents.

2. Repeated Pre-Vetting

- Enables training providers to update and resubmit pre-approved programs.
- Supports modifications to training dates, speakers, and participant listings.

3. Program Cancellation

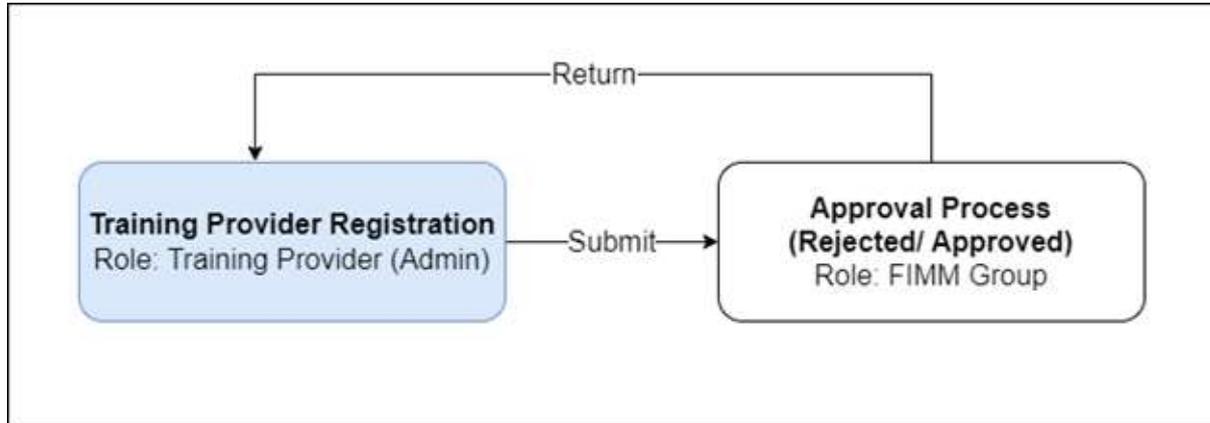
- Manages the cancellation of CPD programs.
- Requires re-submission of participant listings for compliance tracking..

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	29

3.1 Training Provider Management

3.1.1 Create Application

3.1.1.1 Process Flow



	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	30	

3.1.1.2 Manual Step

Sign Up

1. User sign up to FIMM Core System and select role
 - Role: Training Provider
 - Email

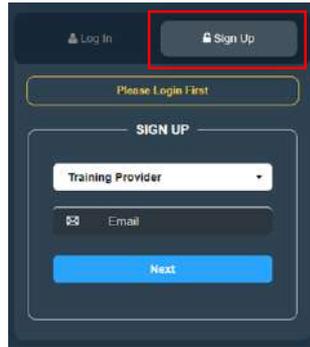
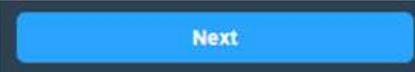


Diagram 20: Sign Up

2. User click :
 - i. Password
 - ii. Confirm Password
 - iii. Tickbox

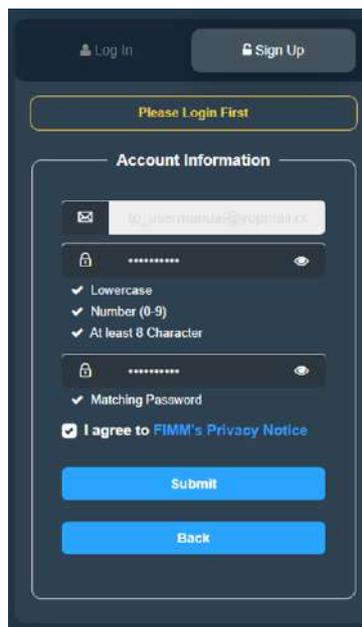
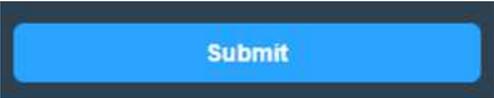


Diagram 21: Sign Up

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	31



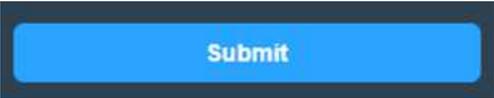
3. User click . System will send email verification and message.



Diagram 22: Sign Up

4. User receive email and click Verification Link.

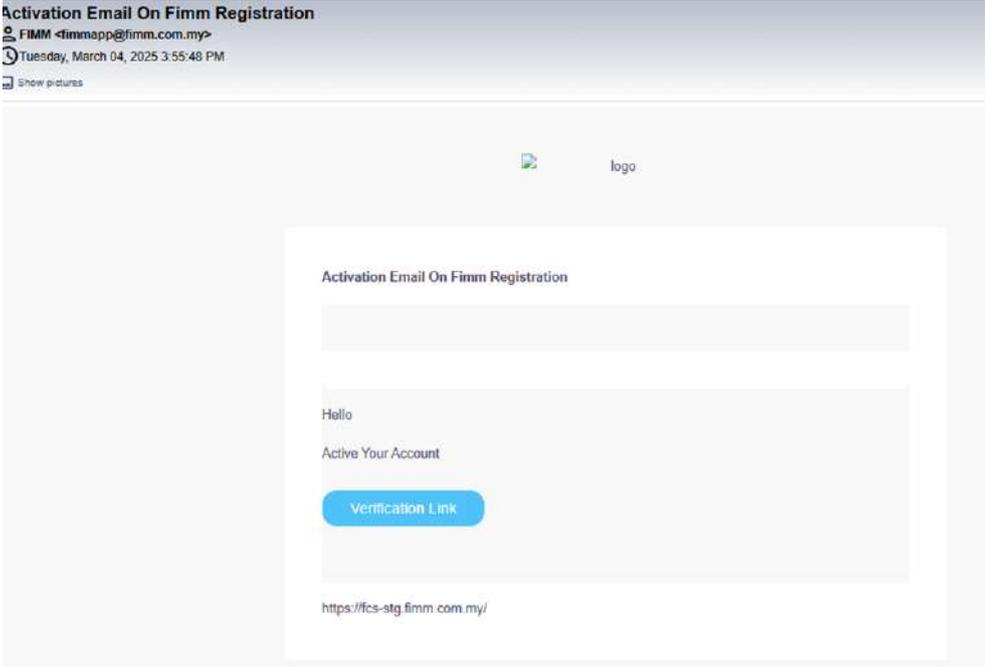


Diagram 23: Email

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	32

5. User login to system using the registered Email and Password.

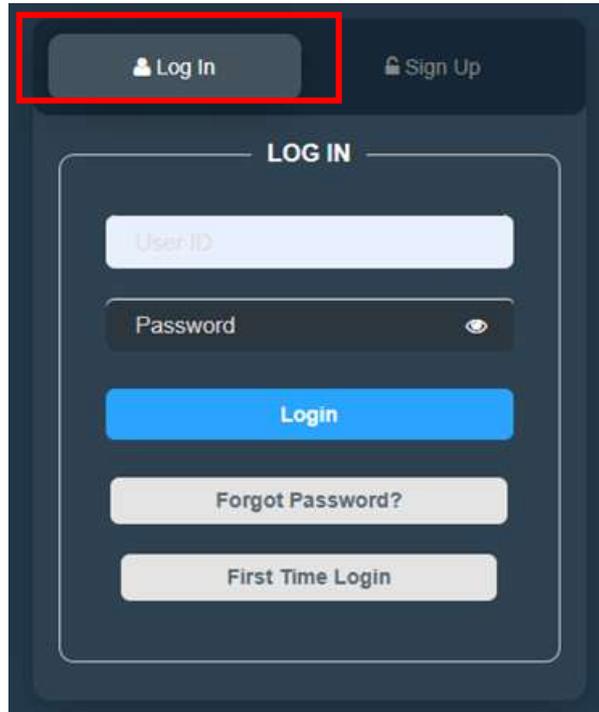


Diagram 24: Login

Register as ESC

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

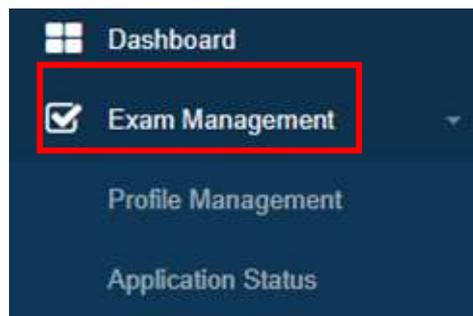


Diagram 25: Menu

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	33

2. Click submenu Training Provider.

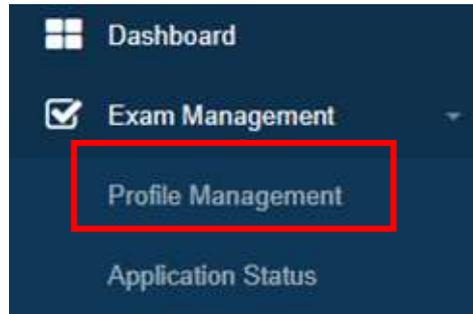


Diagram 26: Submenu

3. Click  to register.

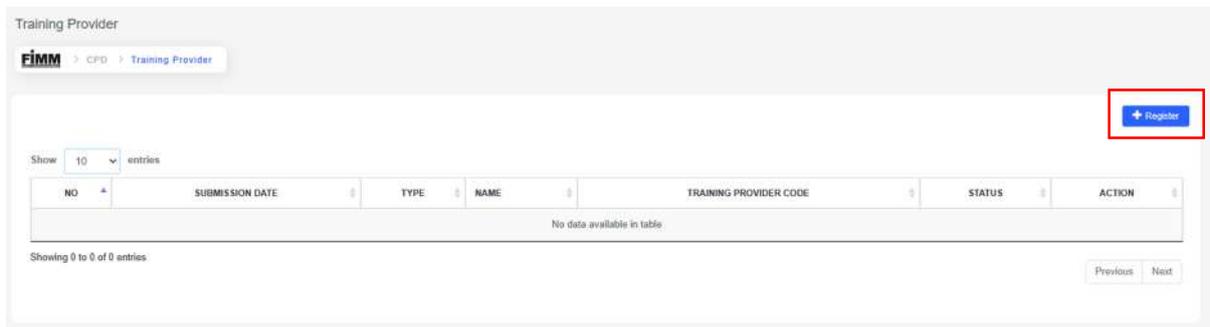


Diagram 27: Register

4. System will display the form. User fill in the detail.

- i. Training Provider Profile
 - a) Training Provider Name

ii. User click .



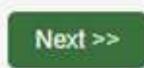
Diagram 28: Form Training Provider

FIMM	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia (FIMM)	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	34

5. System will show the form. User fill in the details (Section Profile)

Diagram 29: Form Training Provider

- i. Training Provider Profile
 - a) Training Provider Name
 - b) Registration No (New)
 - c) Registration No (Old)
 - d) Training Provider Type
 - e) Business Address
 - f) Country
 - g) Postcode
 - h) State
 - i) City
 - j) Postcode
 - k) Phone Number
 - l) Website
 - m) Email
- ii. Admin profile
 - a) Email Address
 - b) Name
 - c) Phone Number

- iii. User click  to go to the next page.

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	35

6. System will show the form. User fill in the details (Section CEO Profile)

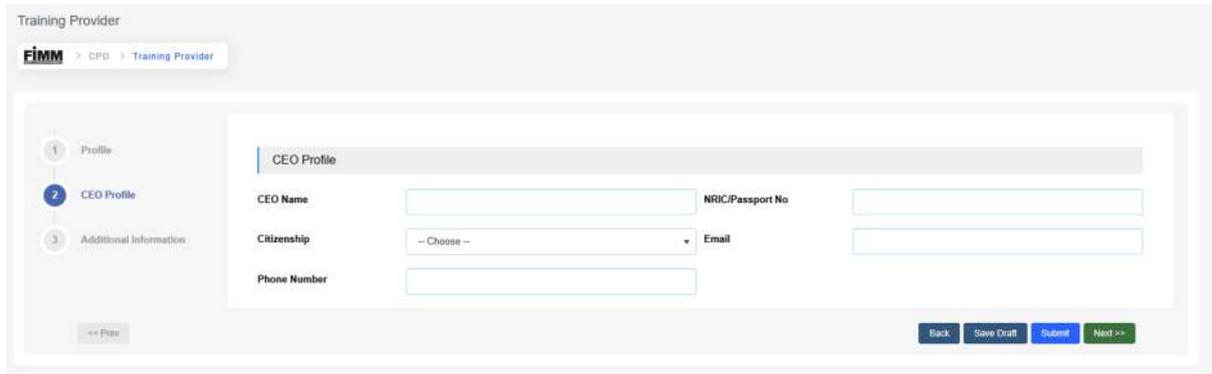


Diagram 30: Form Training Provider

- i. CEO Profile
 - a) CEO Name
 - b) NRIC/ Passport No
 - c) Citizenship
 - d) Email
 - e) Phone Number

- ii. User click  to go to the next page.

7. System will show the form. User fill in the details (Section Additional Information)

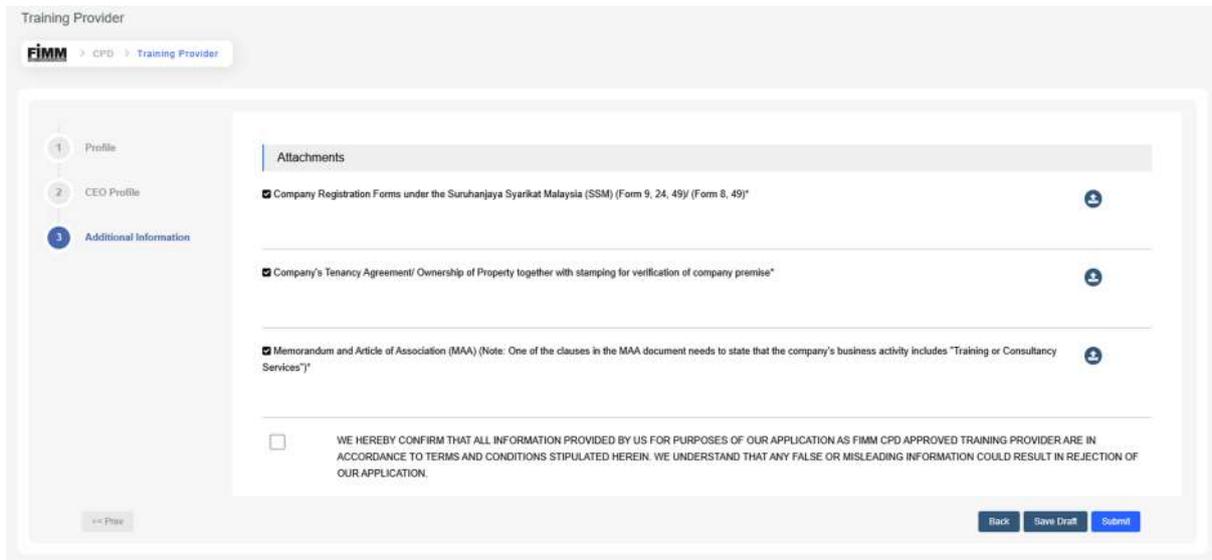


Diagram 31: Form Training Provider

- i. Attachments

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	36

ii. User click  to upload file.

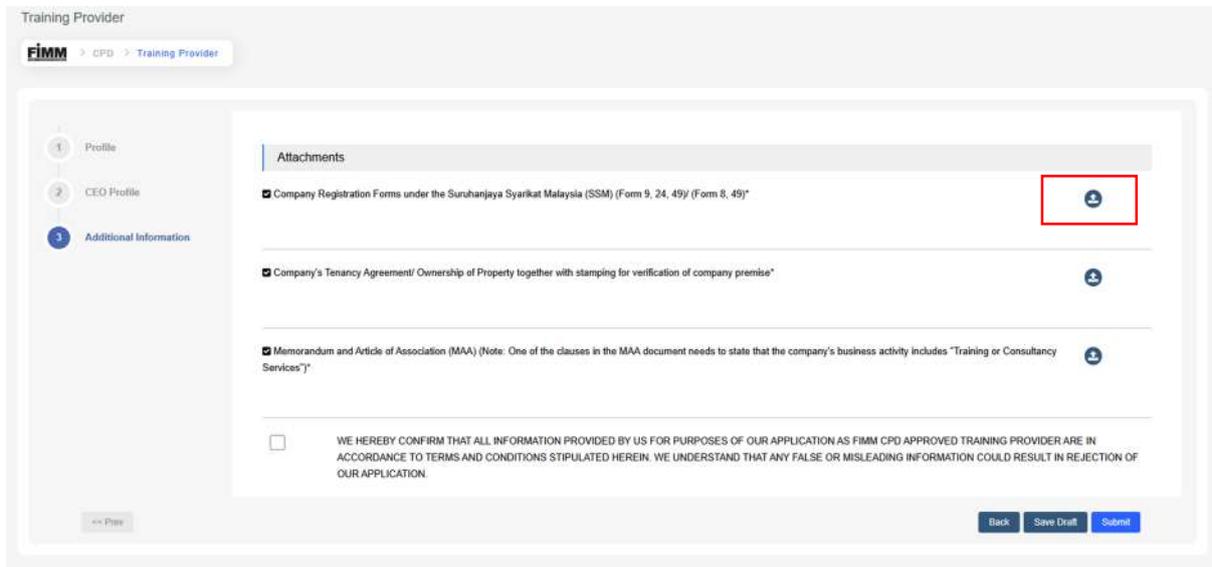


Diagram 32: Upload

iii. System will display a popup.
a) Upload

- Upload File

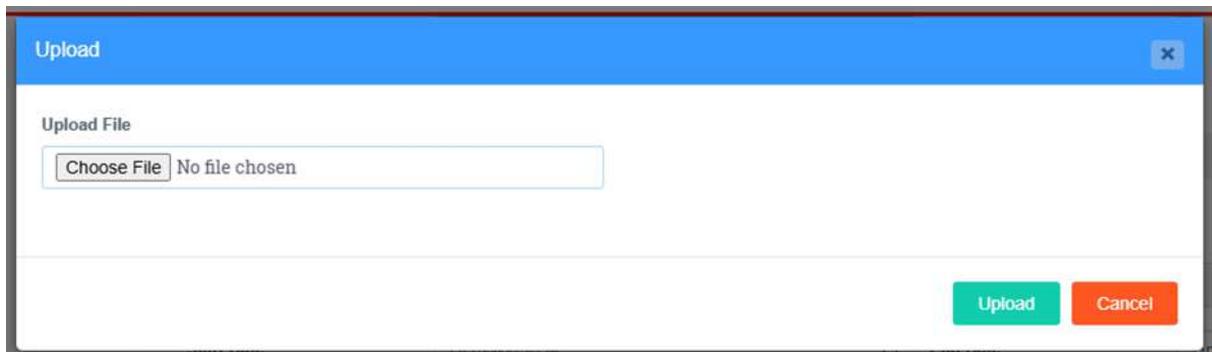


Diagram 33: Upload

iv. User click  to cancel upload and close the page.

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	37

v. User click  to upload new file.



Diagram 34: Popup Message

vi. User click  to save the application as draft.

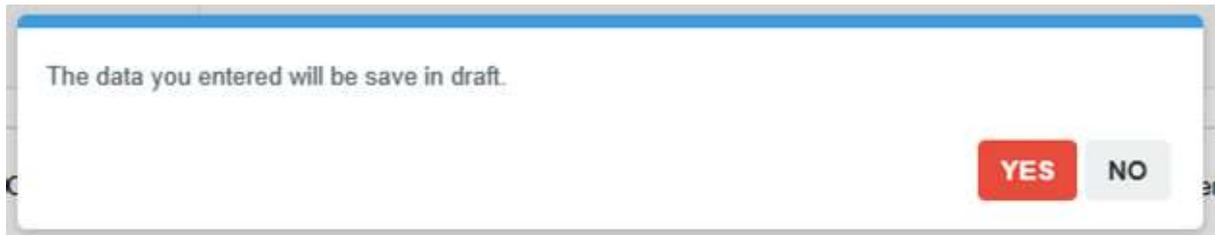


Diagram 35: Popup Message

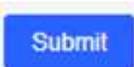
vii. User click  to submit the application to FIMM.



Diagram 36: Popup Message

FIMM	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia (FIMM)	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	38

View Application

8. Click submenu Training Provider.

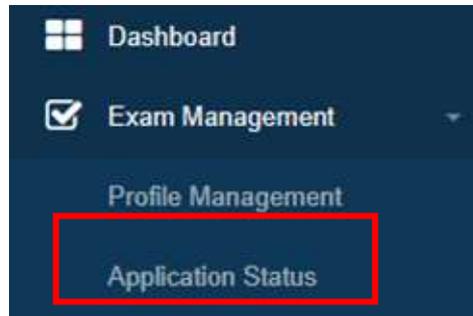


Diagram 37: Submenu

9. User click tab Log. System will display the log history.

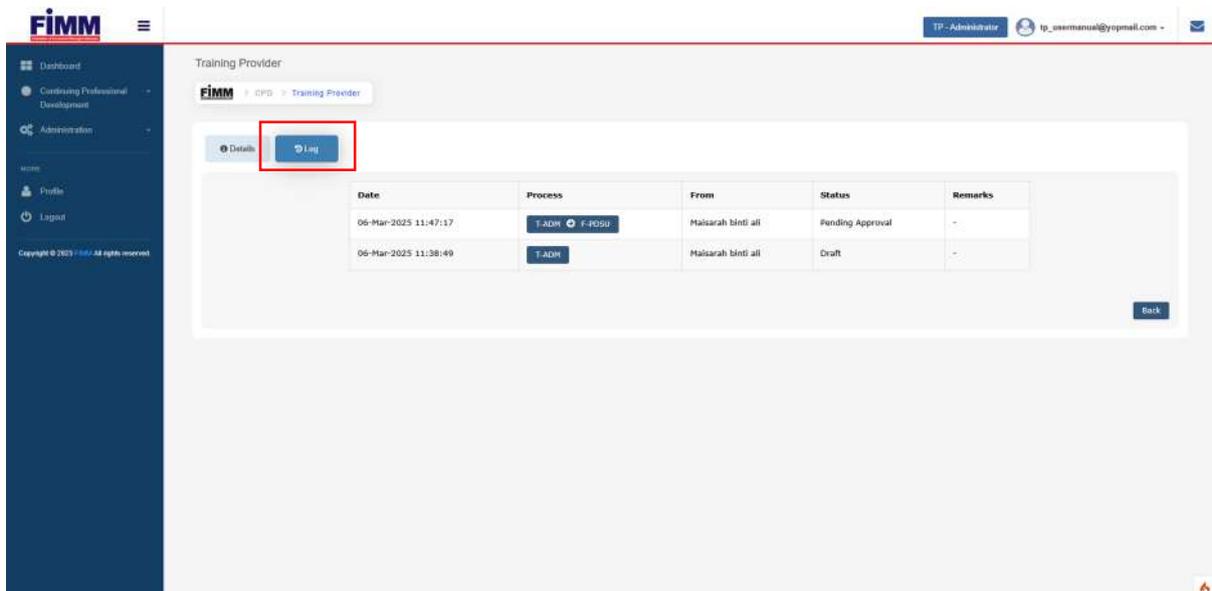


Diagram 38: Log

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	39

Add Company User

10. Click menu Administration. System will display submenu under Administration.

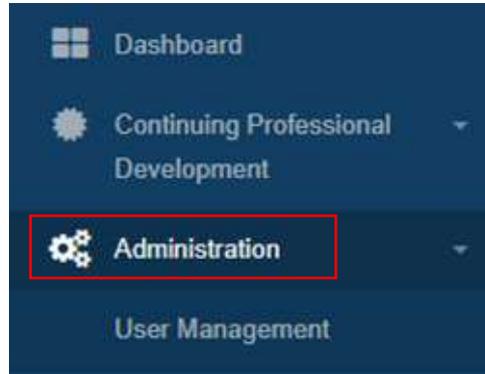


Diagram 39: Menu

11. Click submenu User Management.

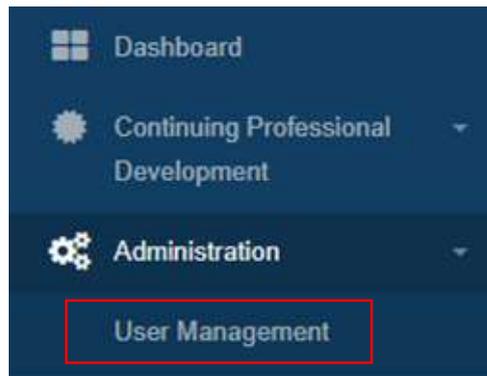


Diagram 40: Submenu

FIMM	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia (FIMM)	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	40

12. System will display List of User Management.

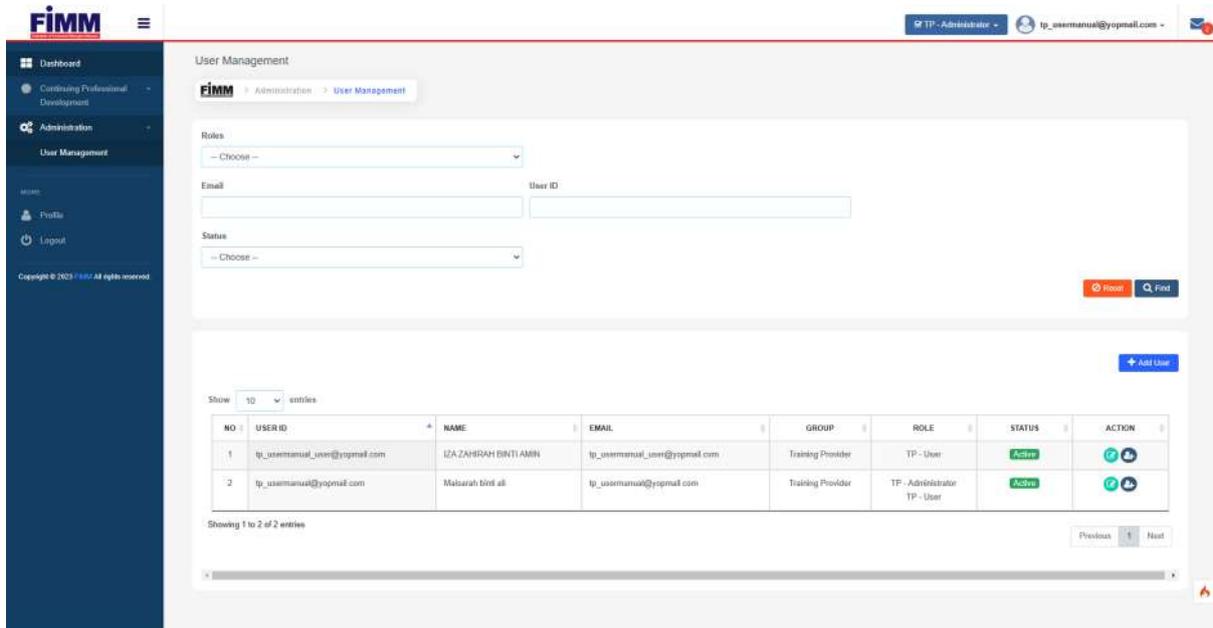
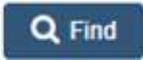


Diagram 41: List of User Management

13. User can filter the list by either one or more of and click  :

- Roles
- Email
- User ID
- Status



Diagram 42: Filter

FIMM	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	41

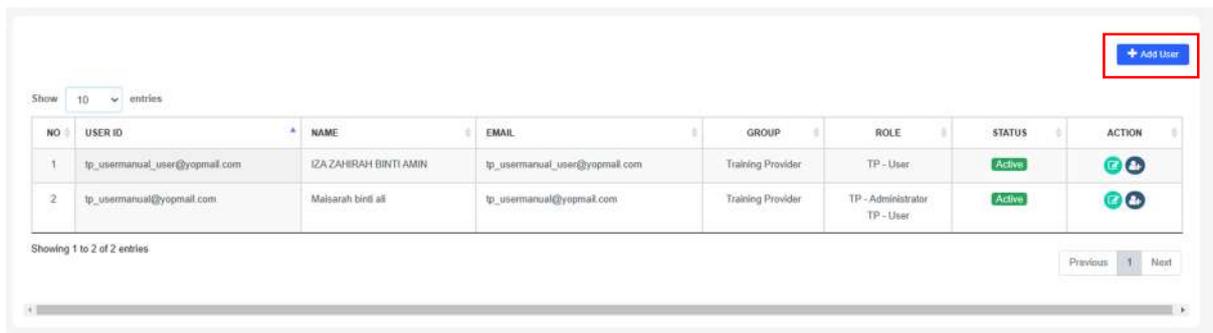
14. User click  to clear the filter.



The screenshot shows the 'User Management' page with a search filter area. A red box highlights the 'Reset' button located at the bottom right of the filter area, next to a 'Find' button.

Diagram 43: Reset

15. Click  to create new company user.



The screenshot shows the 'User Management' page with a table of users. A red box highlights the '+ Add User' button in the top right corner. The table below shows two existing users.

NO	USER ID	NAME	EMAIL	GROUP	ROLE	STATUS	ACTION
1	tp_usermanual_user@yopmail.com	IZA ZAHIRAH BINTI AMIN	tp_usermanual_user@yopmail.com	Training Provider	TP - User	Active	 
2	tp_usermanual@yopmail.com	Maisarah binti aii	tp_usermanual@yopmail.com	Training Provider	TP - Administrator TP - User	Active	 

Diagram 44: Add New Company User

FIMM	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	42	

16. System will display this form. User fill in the details:

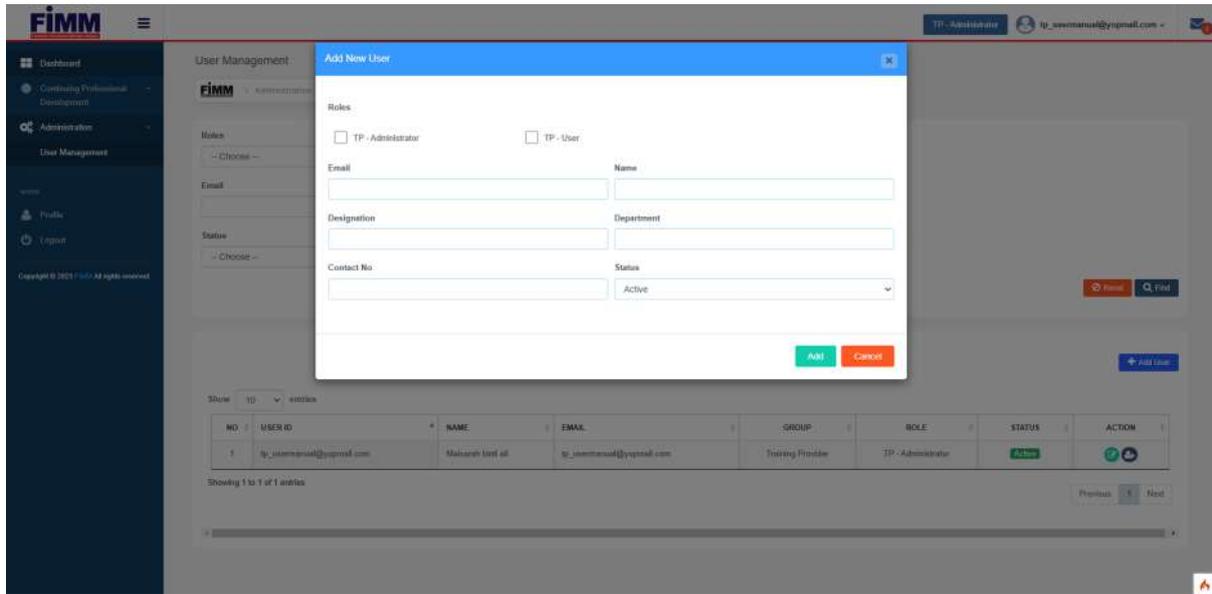
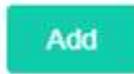


Diagram 45: Add New Company User

- i. Add New User
 - a) Roles
 - b) Email
 - c) Name
 - d) Designation
 - e) Department
 - f) Contact No.
 - g) Status



- ii. User click .

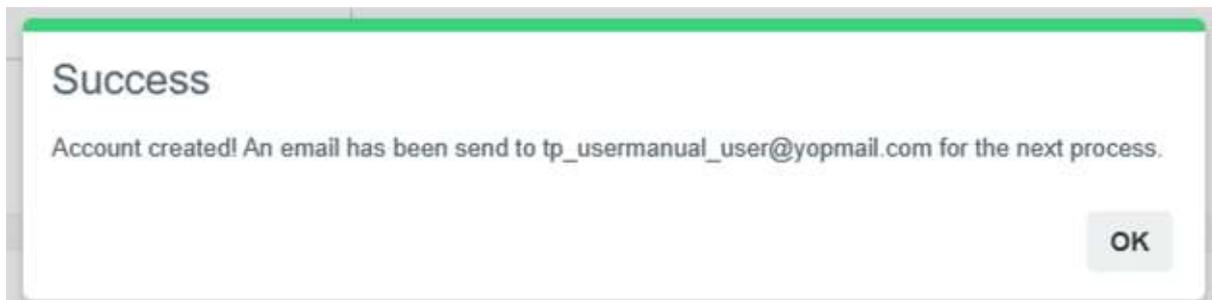


Diagram 46: Popup Message

FIMM	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia (FIMM)	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	43

iii. User receive email and login using the credentials.

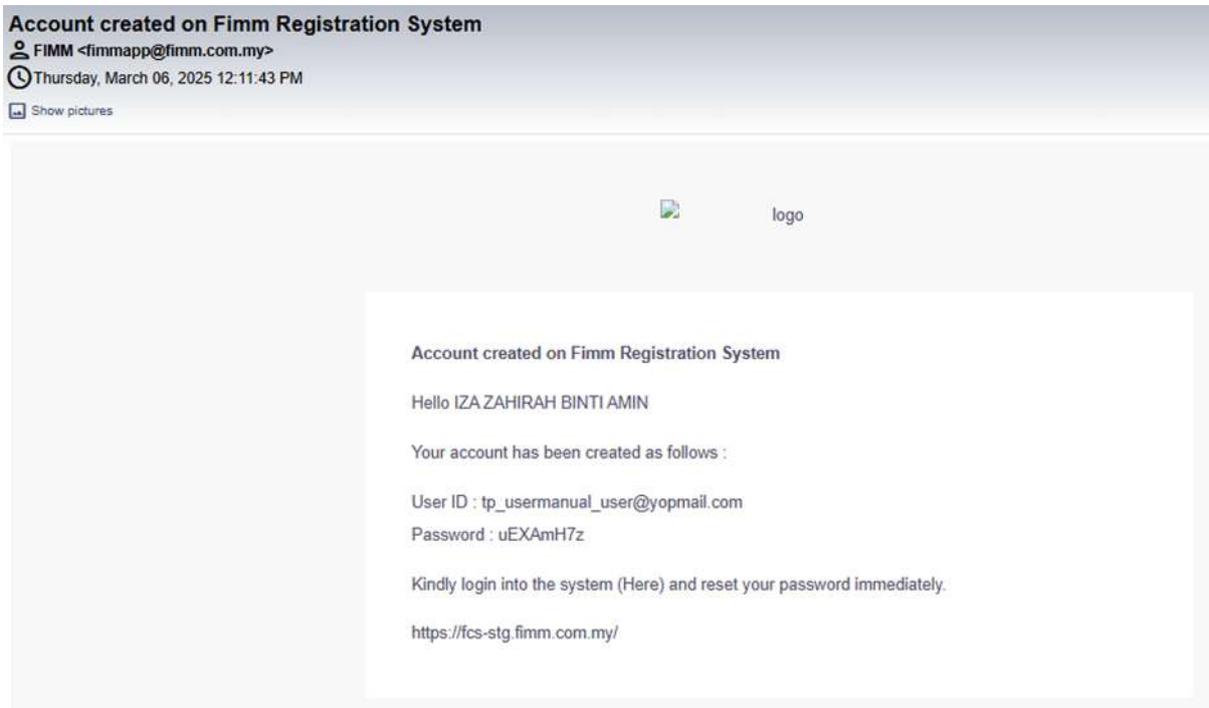


Diagram 47: Email

Update Roles to Existing User

17. In List of User Management, under column Action user click  .

NO	USER ID	NAME	EMAIL	GROUP	ROLE	STATUS	ACTION
1	tp_usermanual_user@yopmail.com	IZA ZAHIRAH BINTI AMIN	tp_usermanual_user@yopmail.com	Training Provider	TP - User	Active	 
2	tp_usermanual@yopmail.com	Maisarah binti aii	tp_usermanual@yopmail.com	Training Provider	TP - Administrator	Active	 

Diagram 48: List of User Management

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	44

18. System will display the form.

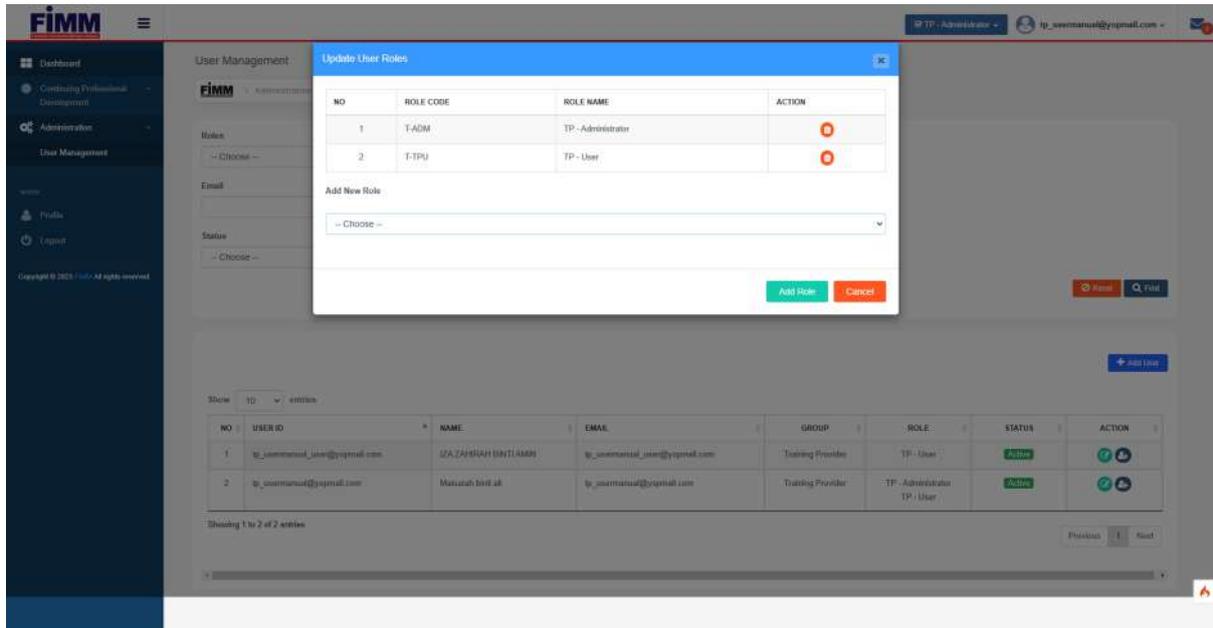


Diagram 49: Update Roles

- i. Update User Roles
 - a) Add New Role
- ii. User click  to remove existing role.

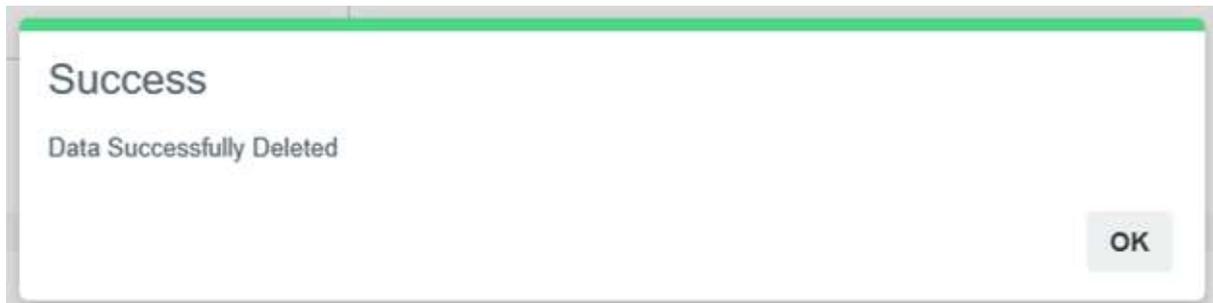
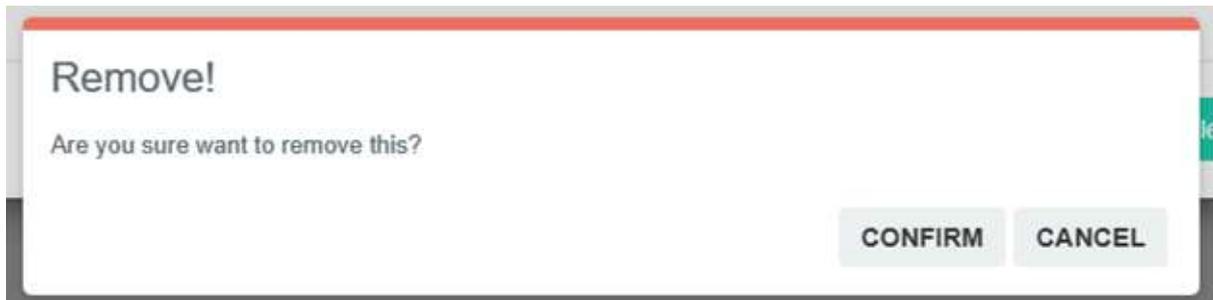


Diagram 50: Popup Message

 FIMM <small>Federation of Investment Managers Malaysia</small>	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	45

iii. User click  to add new role.

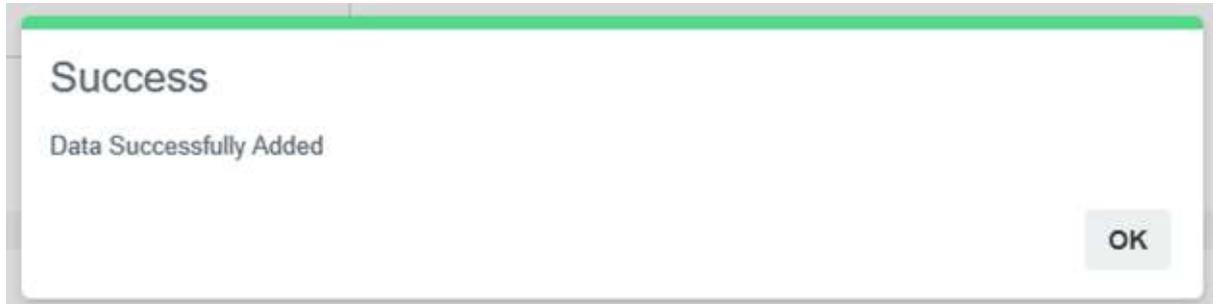


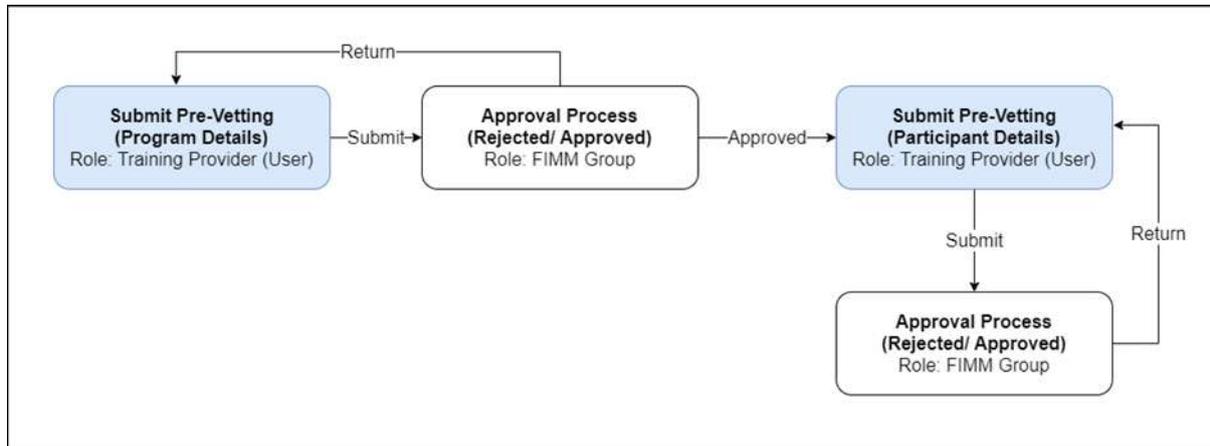
Diagram 51: Popup Message

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	46

3.2 Pre-Vetting

3.2.1 Create Application

3.2.1.1 Process Flow



	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	47

3.2.1.2 Manual Step

Submit Program Details

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

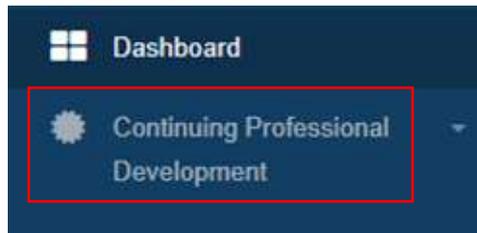


Diagram 52: Menu

2. Click submenu Pre-Vetting.

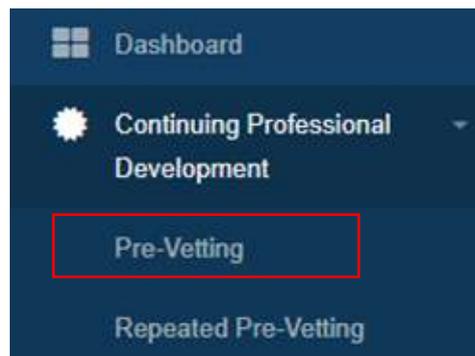


Diagram 53: Submenu

FIMM	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	48

3. System will show List of Pre -Vetting.

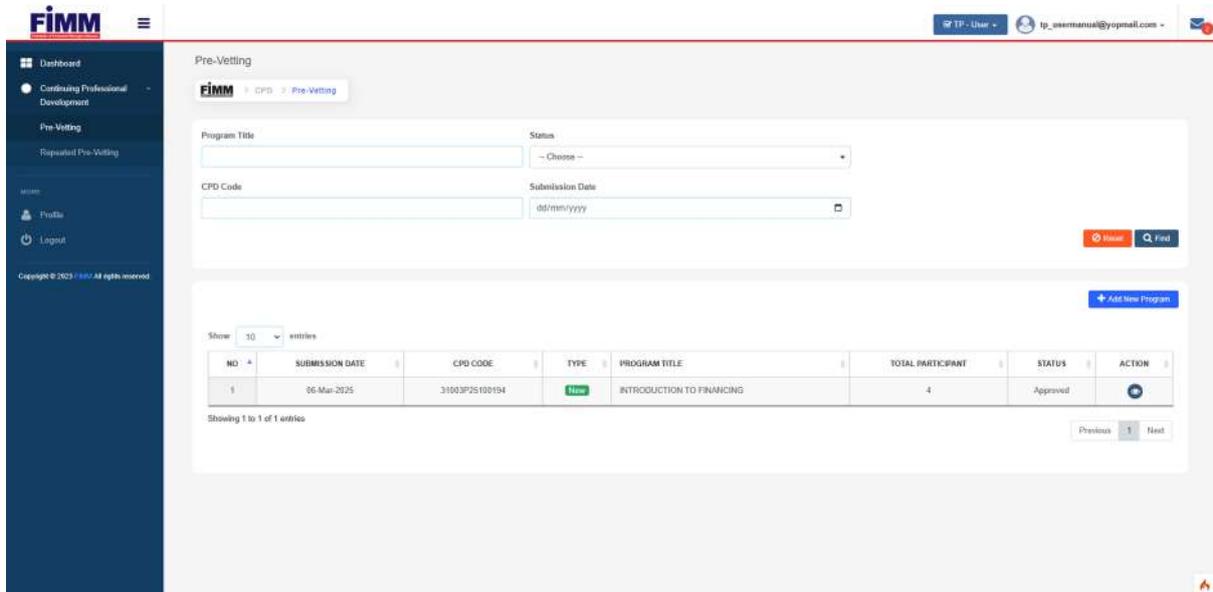
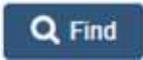


Diagram 54: List of Pre-Vetting

4. User can filter the list by either one or more of and click  :
- i. Program Title
 - ii. Status
 - iii. CPD Code
 - iv. Submission Date

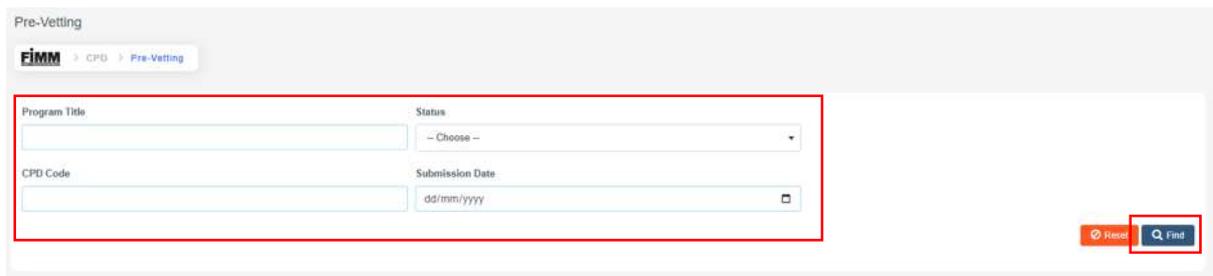
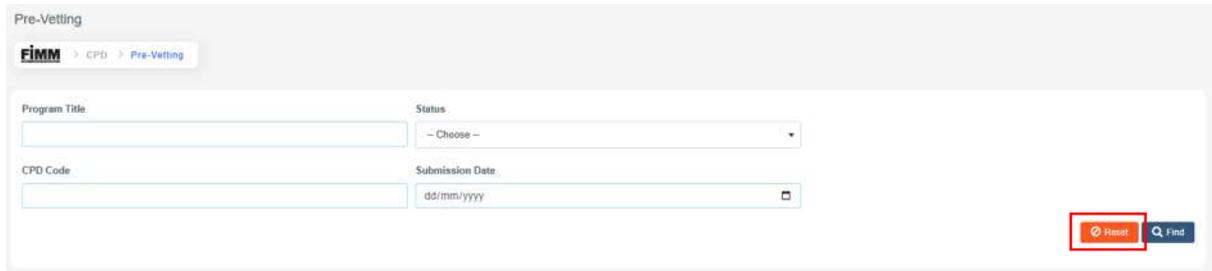


Diagram 55: Filter

FIMM	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia (FIMM)	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	49

5. User click  to clear the filter.



Pre-Vetting

FIMM > CPD > Pre-Vetting

Program Title:

Status: -- Choose --

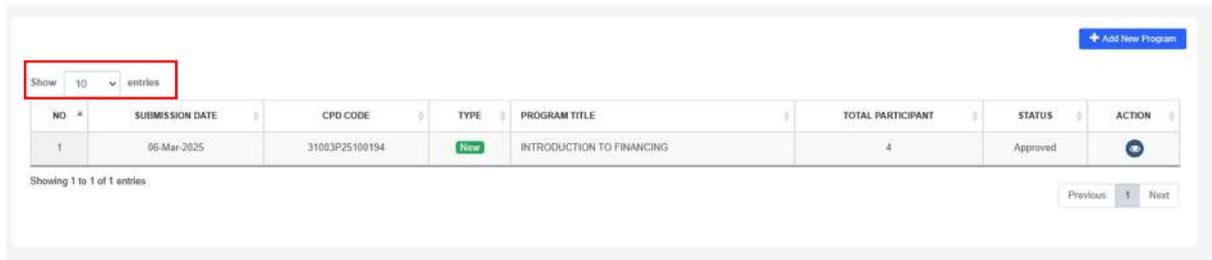
CPD Code:

Submission Date: dd/mm/yyyy

[Reset](#) [Find](#)

Diagram 56: Reset

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



[+ Add New Program](#)

Show 10 entries

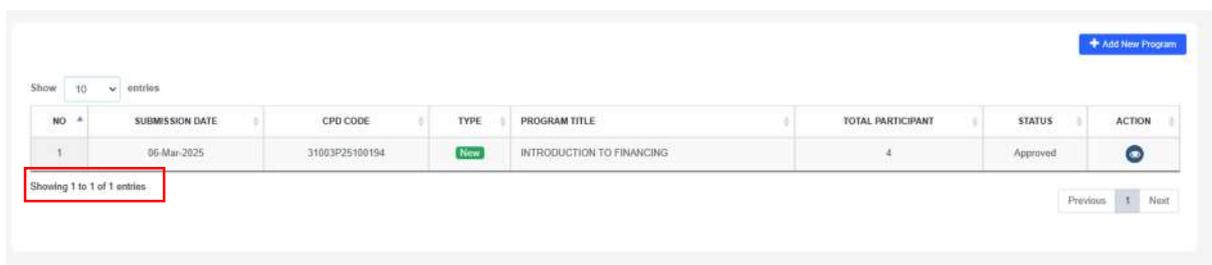
NO	SUBMISSION DATE	CPD CODE	TYPE	PROGRAM TITLE	TOTAL PARTICIPANT	STATUS	ACTION
1	06-Mar-2025	31083P25100194	New	INTRODUCTION TO FINANCING	4	Approved	ⓘ

Showing 1 to 1 of 1 entries

Previous 1 Next

Diagram 57: Filter Total Entries

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



[+ Add New Program](#)

Show 10 entries

NO	SUBMISSION DATE	CPD CODE	TYPE	PROGRAM TITLE	TOTAL PARTICIPANT	STATUS	ACTION
1	06-Mar-2025	31083P25100194	New	INTRODUCTION TO FINANCING	4	Approved	ⓘ

Showing 1 to 1 of 1 entries

Previous 1 Next

Diagram 58: Total Entries

FIMM	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia (FIMM)	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V.1.0	User Manual Document	1.1	10/04/25	50

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.

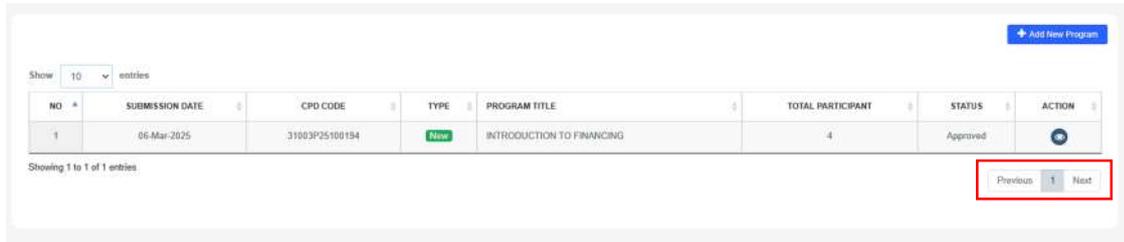


Diagram 59: Pagination

9. Click  to submit new program.

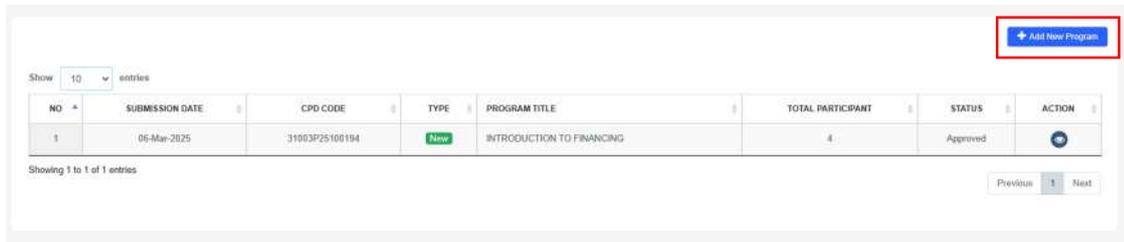


Diagram 60: Submit Pre-Vetting

10. System will display this form. User fill in the details:

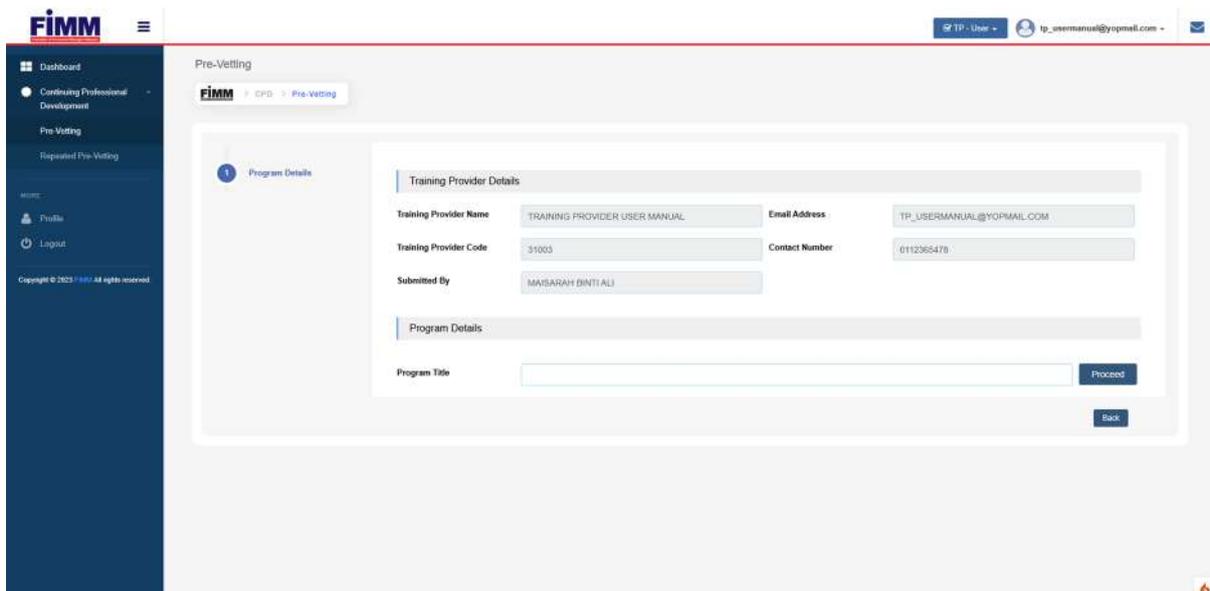
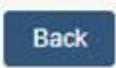


Diagram 61: Form Pre-Vetting

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	51

- i. Training Provider Details
- ii. Program Details
 - a) Program Title

- iii. User click  to go back to List of Pre-Vetting.

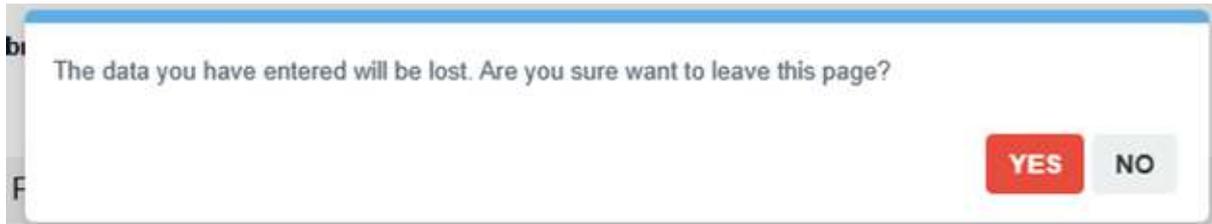


Diagram 62: Popup Message

- iv. User click  to go to the next form.

11. System will display this form. User fill in the detail in section Program Details.

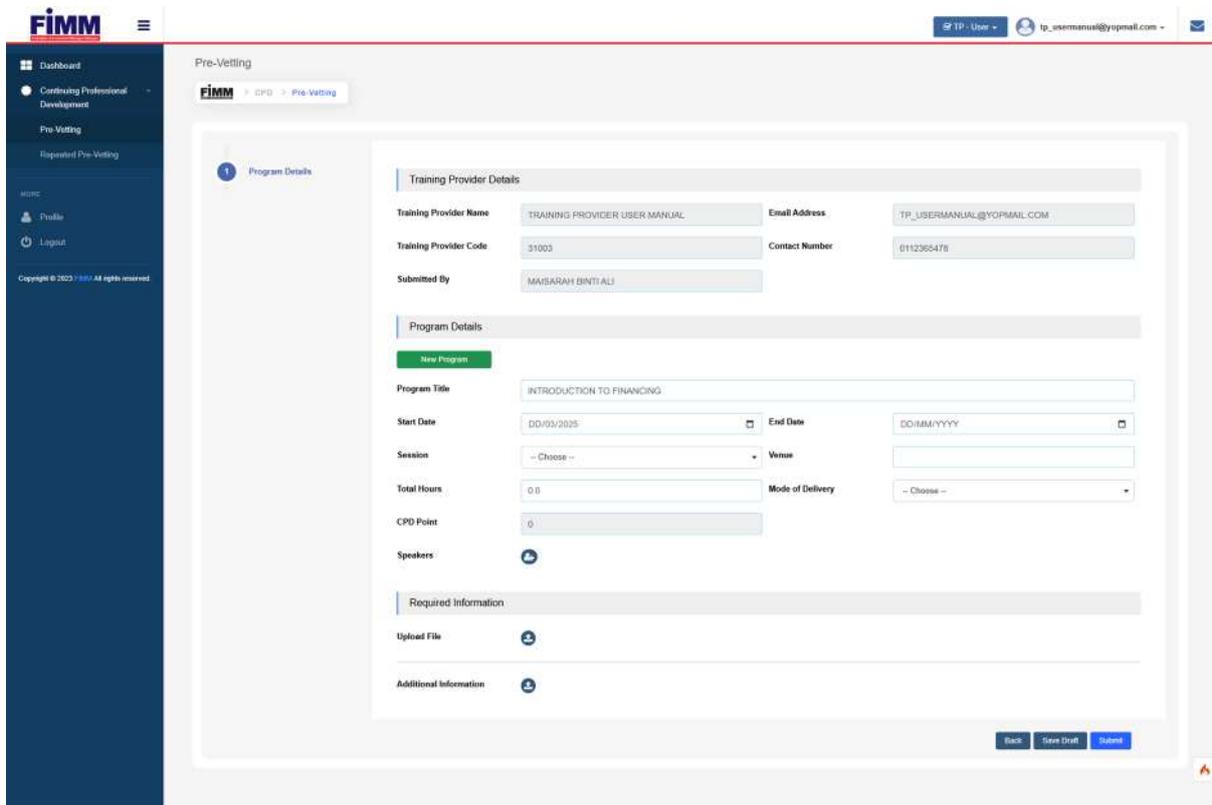


Diagram 63: Form Pre-Vetting

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	52

- i. Training Provider Details
 - a) Training Provider Name
 - b) Training Provider Code
 - c) Submitted By
 - d) Email Address
 - e) Contact Number

- ii. Program Details
 - a) Program Title
 - b) Start Date
 - c) End Date
 - d) Session
 - e) Venue
 - f) Total Hours
 - g) Mode of Delivery
 - h) CPD Point
 - i) Speakers

iii. User click  to add speaker.

Program Details

[New Program](#)

Program Title

Start Date **End Date**

Session **Venue**

Total Hours **Mode of Delivery**

CPD Point

Speakers 

Diagram 64: Form Pre-Vetting

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	53

- iv. System will display a popup.
 - a) Add Program Speaker
 - Name
 - Profile

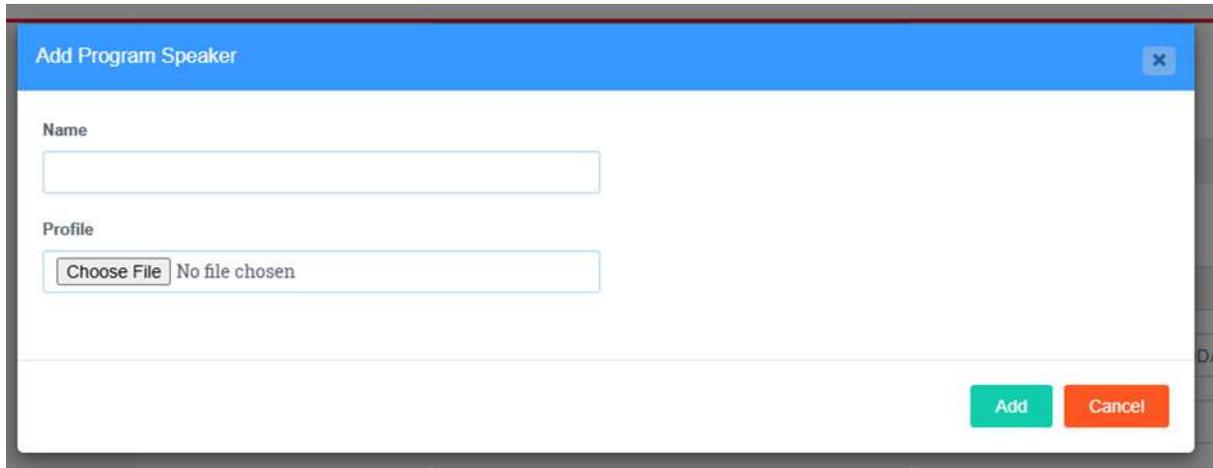
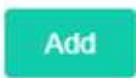


Diagram 65: Upload

- v. User click  to cancel add speaker and close the page.
- vi. User click  to add new speaker.

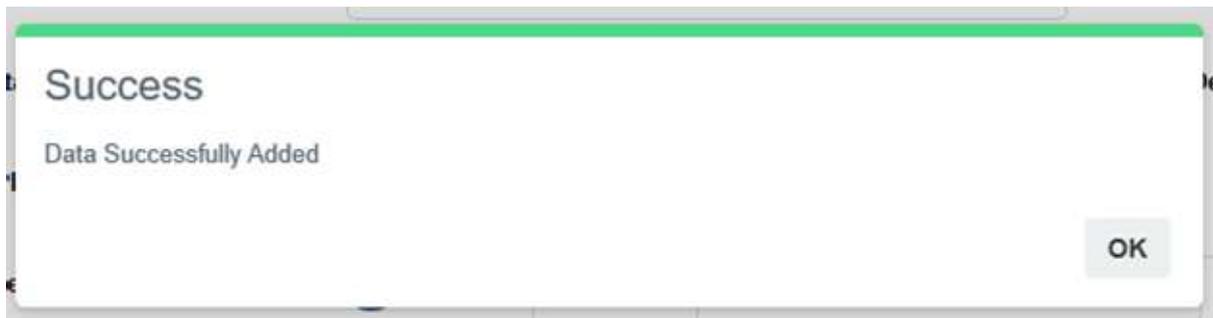


Diagram 66: Popup Message

- vii. Required Information
 - a) Upload File
 - b) Additional Information

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	54	

viii. User click  to upload file.



Diagram 67: Upload

- ix. System will display a popup.
- a) Upload
 - Upload File

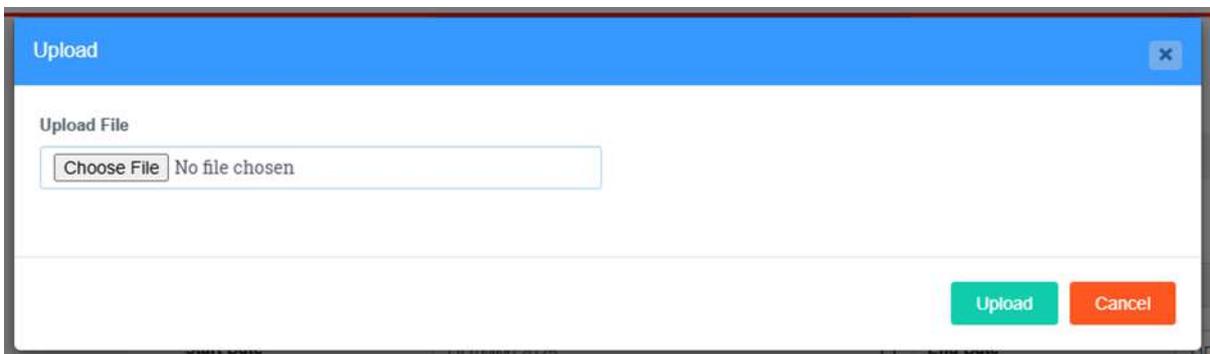


Diagram 68: Upload

- x. User click  to cancel upload and close the page.
- xi. User click  to upload new file.

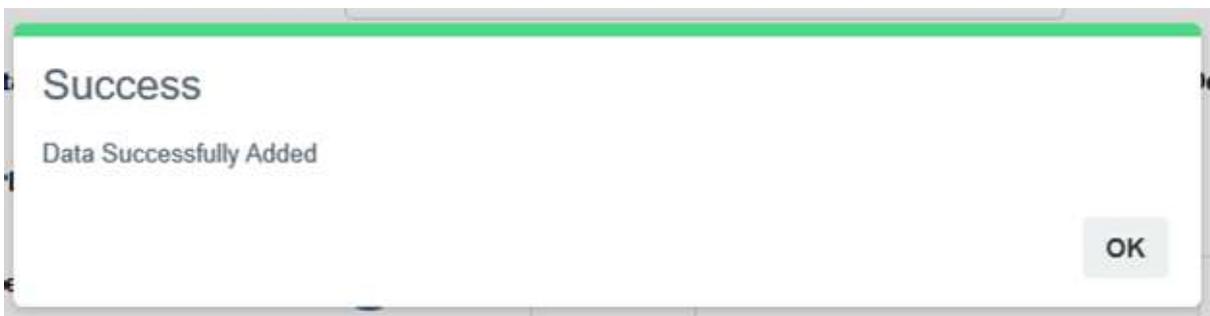


Diagram 69: Popup Message

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	55

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

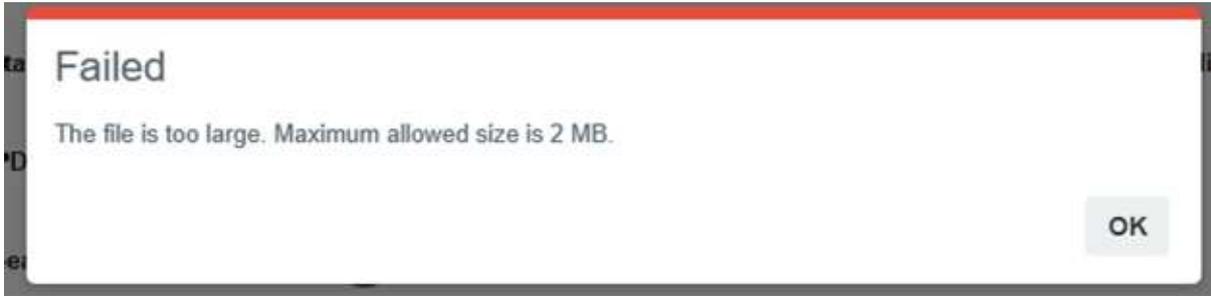


Diagram 70: Error Message

xiii. User click **Back** to go back to List of Pre-Vetting.

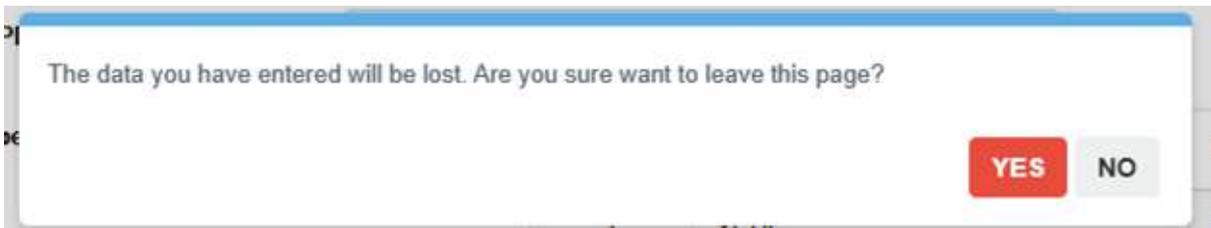


Diagram 71: Popup Message

xiv. User click **Save Draft** to save the application as draft.

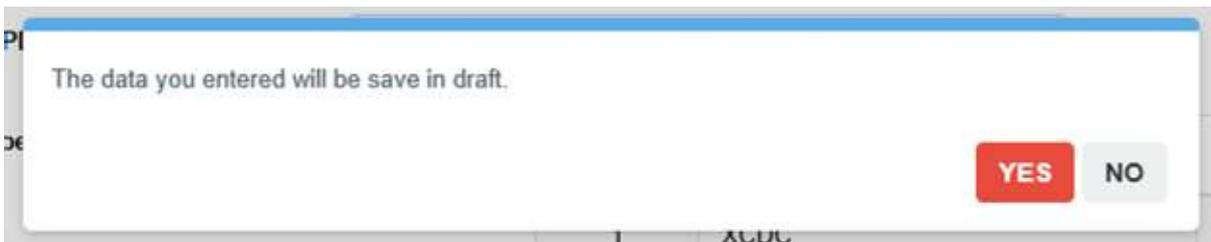


Diagram 72: Popup Message

FIMM	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia (FIMM)	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	56

xv. User click  to submit the application to FIMM.

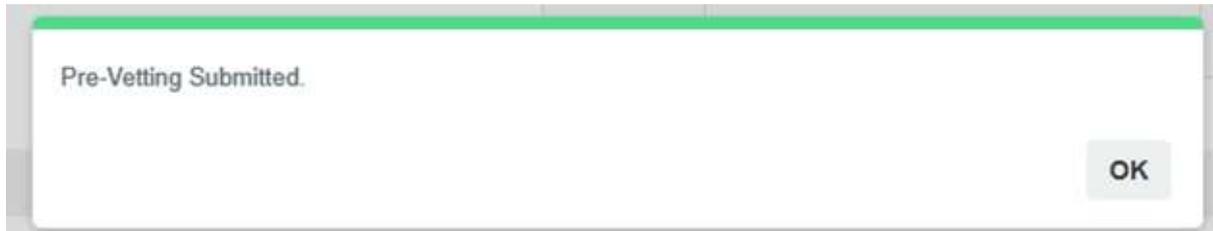
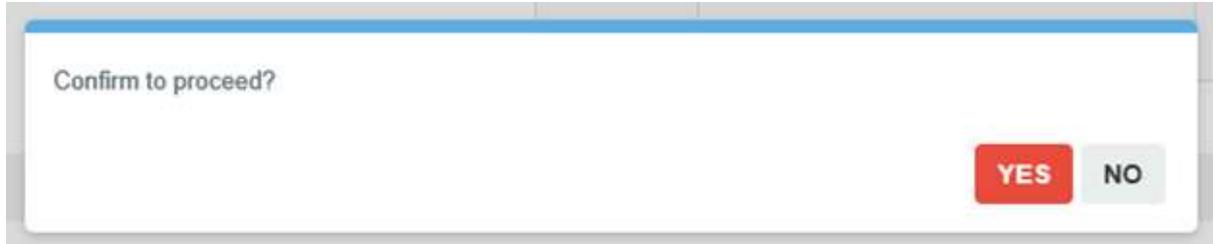


Diagram 73: Popup Message

Submit Feedback and Participant Details

12. In List of Pre-Vetting under column Action, click  with approval status Pending Update.

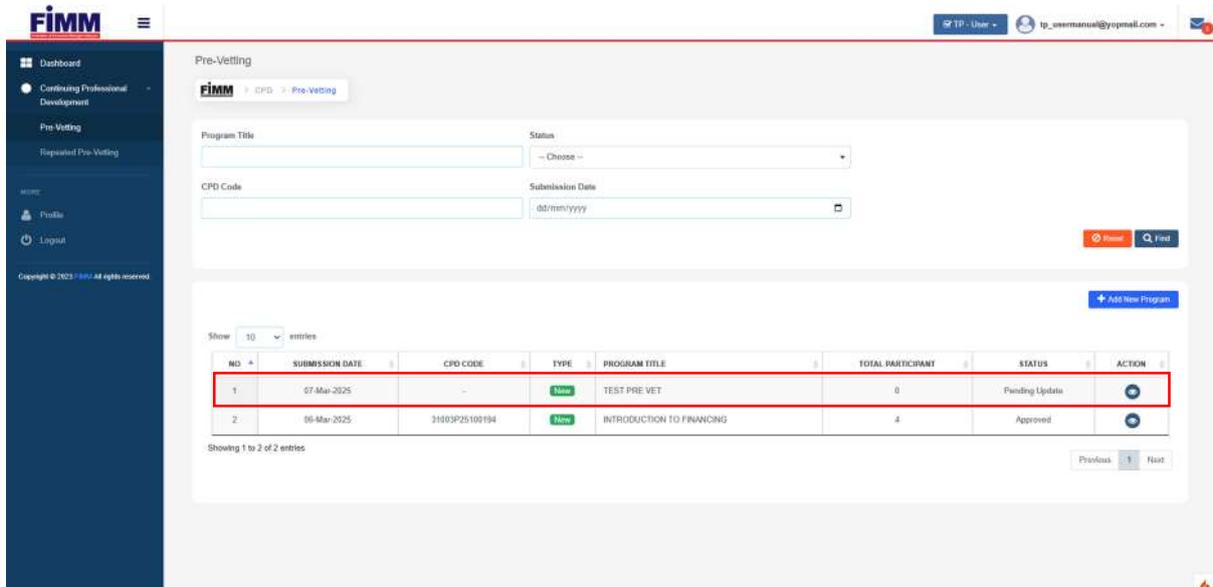
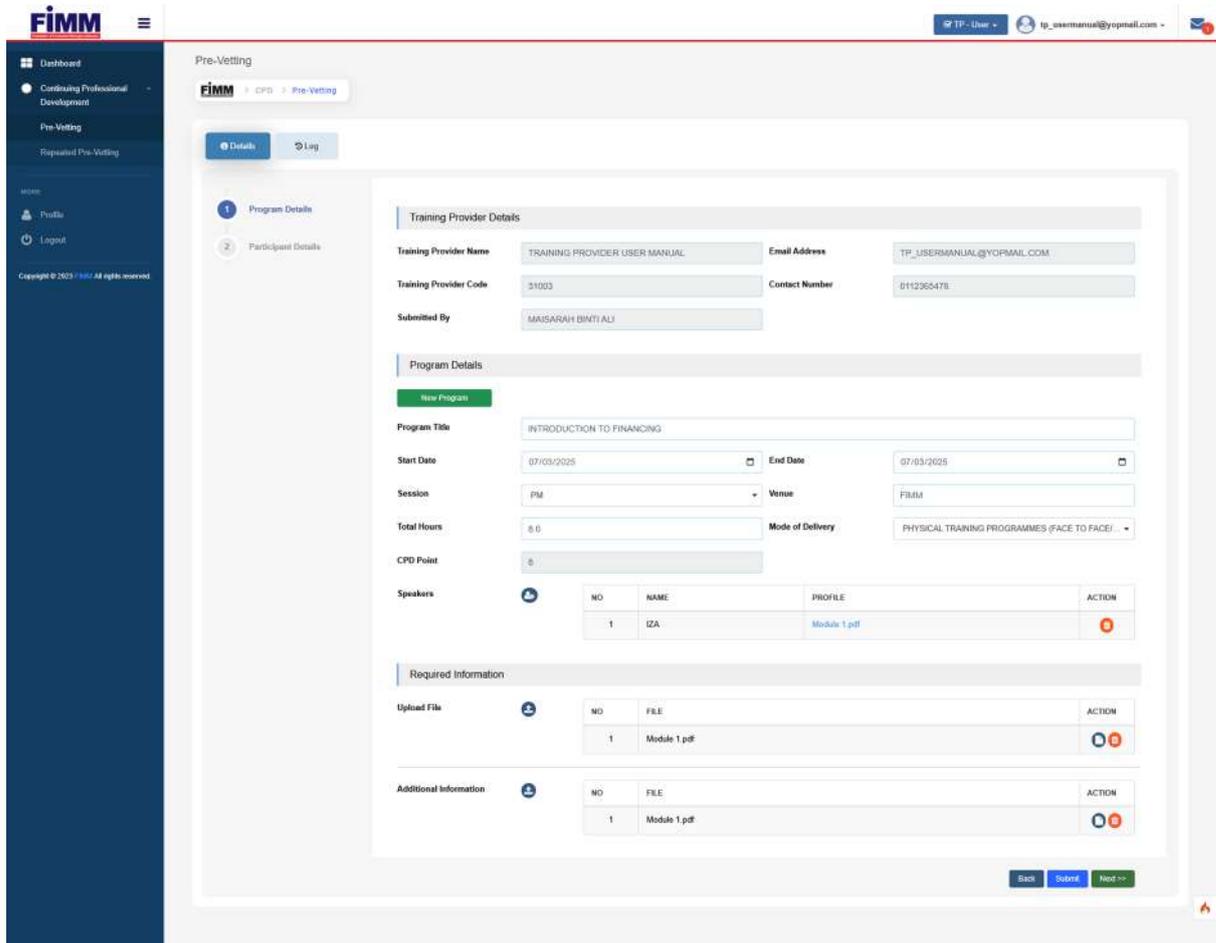


Diagram 74: List of Pre-Vetting

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	57

13. System will display the form.



The screenshot shows the 'Pre-Vetting' form in the FIMM system. The form is divided into several sections:

- Training Provider Details:**
 - Training Provider Name: TRAINING PROVIDER USER MANUAL
 - Email Address: TP_USERMANUAL@YOPMAIL.COM
 - Training Provider Code: 34003
 - Contact Number: 0112355478
 - Submitted By: MAISARAH BIMTI ALI
- Program Details:**
 - Program Title: INTRODUCTION TO FINANCING
 - Start Date: 07/03/2025
 - End Date: 07/03/2025
 - Session: PM
 - Venue: FIMM
 - Total Hours: 8.0
 - Mode of Delivery: PHYSICAL TRAINING PROGRAMMES (FACE TO FACE)
 - CPD Point: 8
- Speakers:**

NO	NAME	PROFILE	ACTION
1	IZA	Module 1.pdf	
- Required Information:**

NO	FILE	ACTION
1	Module 1.pdf	
- Additional Information:**

NO	FILE	ACTION
1	Module 1.pdf	

At the bottom right of the form, there are three buttons: 'Back', 'Submit', and 'Next >>'. The 'Next >>' button is highlighted in green.

Diagram 75: Form Pre-Vetting

14. User click  to go to the next section.

FIMM	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia (FIMM)	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	58

15. System will display the form. User fill in the details.

Diagram 76: Form Pre-Vetting

- i. Participant Details
 - a) Upload Feedback
 - b) Upload Participant List
 - c) Tickbox
- ii. User click **Participant list template (Excel)** to download Participant List Template.

Diagram 77: Form Pre-Vetting

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	59

iii. User fill in the participants list.

	A	B	C	D	E	F
1		SYSTEM NAME: FIMM CORE SYSTEM (FCS)				
2		FORM NO: FCS.CPD001				
3		FORM NAME: CPD - CONSULTANT LIST				
4		VERSION: V24.001				
5						
6	No	Name	NRIC/ Passport No.	FIMM No.		
7						
8						
9						
10						
11						
12						
13						
14						
15						

Diagram 78: Upload Excel

iv. System will display error if wrong file type is uploaded for participant list.

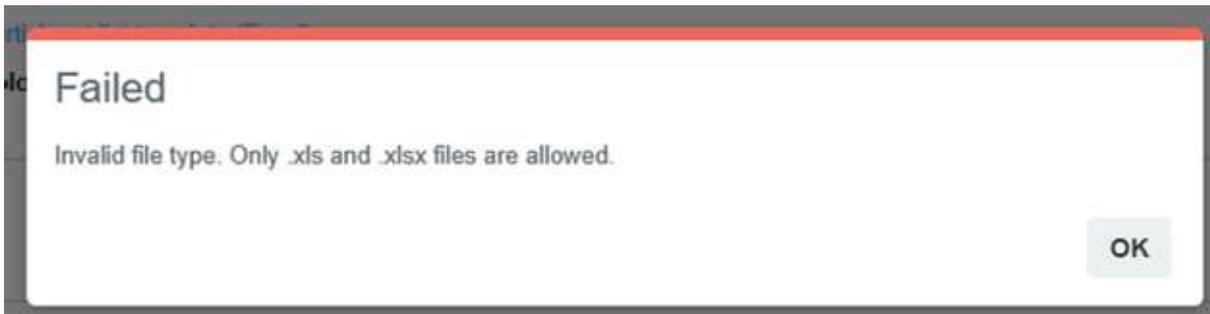


Diagram 79: Error Message

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	60

v. System will display the summary if the file is successfully uploaded.

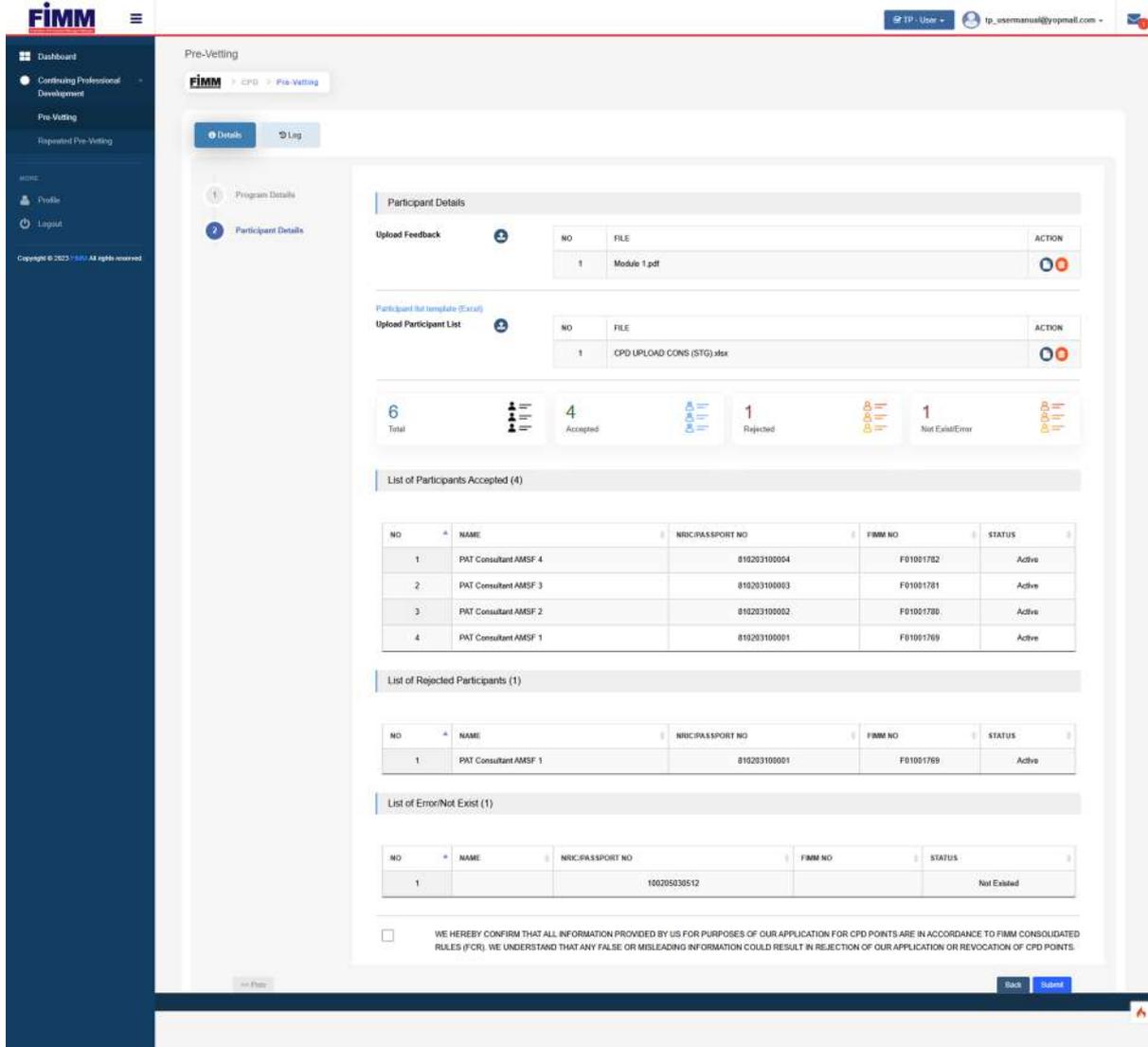
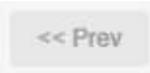


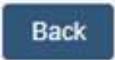
Diagram 80: Form Pre-Vetting

Notes:

- List of Participants Accepted – Consultant is registered with FIMM.
- List of Rejected Participants – Duplicate consultant
- List of Error/ Not Exist – Consultant is not registered with FIMM.

vi. User click  to go to previous section.

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	61

vii. User click  to go back to List of Pre-Vetting.

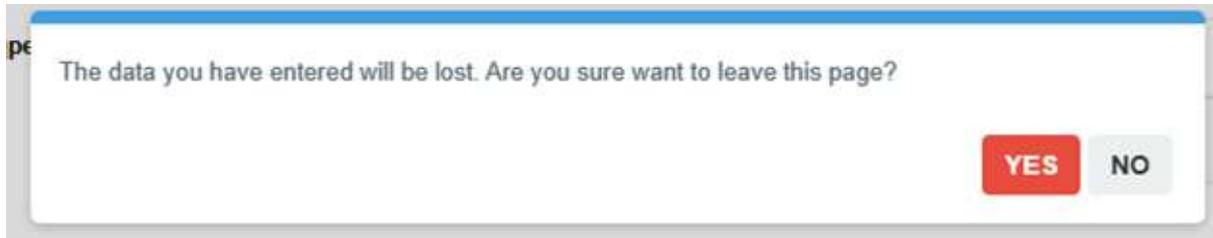
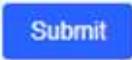


Diagram 81: Popup Message

viii. User click  to submit the application to FIMM.

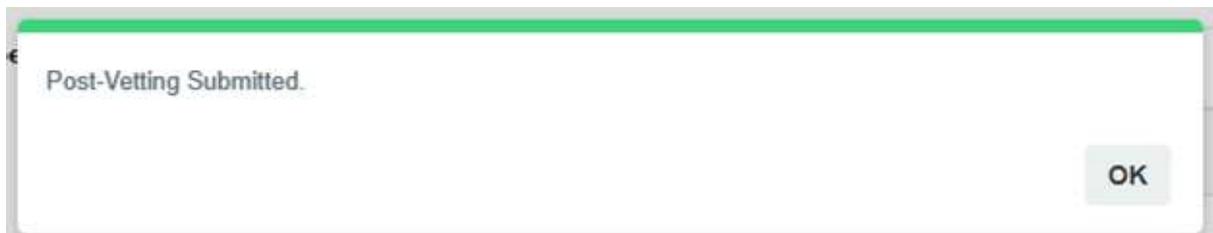
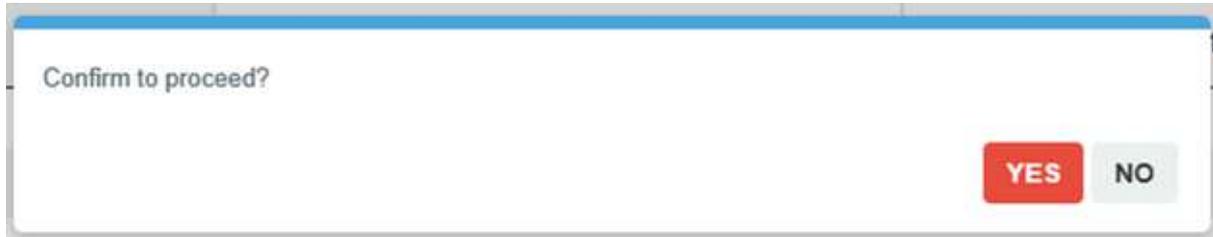


Diagram 82: Popup Message

FIMM	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia (FIMM)	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V.1.0	User Manual Document	1.1	10/04/25	62

View Application and Log

16. In List of Pre-Vetting, user can view applications for all statuses. User click .

The screenshot displays the 'Pre-Vetting' section of the FIMM system. It includes a search form with the following fields:

- Program Title:
- Status:
- CPD Code:
- Submission Date:

Below the search form is a table with the following data:

NO	SUBMISSION DATE	CPD CODE	TYPE	PROGRAM TITLE	TOTAL PARTICIPANT	STATUS	ACTION
1	07-Mai-2025	--	New	TEST PRE VET	4	Pending Approval - Update	
2	06-Mar-2025	31503/25100154	New	INTRODUCTION TO FINANCING	4	Approved	

The table also includes pagination controls: 'Showing 1 to 2 of 2 entries', 'Previous', '1', and 'Next'.

Diagram 83: List of Pre-Vetting

FIMM	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	63	

17. System will display:

i. Tab Details

The screenshot displays the 'Pre-Vetting' form in the FIMM system. The interface includes a sidebar with navigation options like 'Dashboard', 'Continuing Professional Development', 'Pre-Vetting', and 'Repeated Pre-Vetting'. The main content area is titled 'Pre-Vetting' and contains a 'Details' tab (highlighted with a red box) and a 'Log' button. The form is divided into several sections:

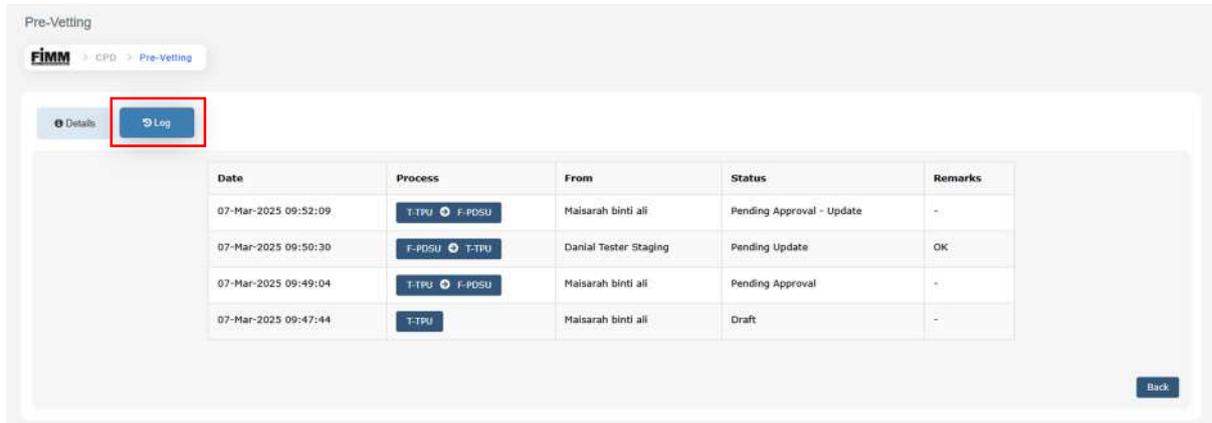
- Training Provider Details:** Includes fields for Training Provider Name (TRAINING PROVIDER USER MANUAL), Email Address (TP_USERMANUAL@YOPMAIL.COM), Training Provider Code (31003), Contact Number (0112365478), and Submitted By (MAISARAH BIMTALI).
- Program Details:** Features a 'New Program' button and fields for Program Title (TEST PRE VET), Start Date (08/03/2025), End Date (08/03/2025), Session (FULL DAY), Venue (KJCC), Total Hours (8.0), Mode of Delivery (PHYSICAL TRAINING PROGRAMMES (FACE TO FACE)), and CPD Point (5).
- Speakers:** A table listing speakers with columns for NO, NAME, and PROFILE. One entry is shown: NO 1, NAME XCDC, PROFILE [Module 1.pdf](#).
- Required Information:** A table for uploading files with columns for NO, FILE, and ACTION. One entry is shown: NO 1, FILE [Module 1.pdf](#), ACTION
- Additional Information:** A table for additional file uploads, identical in structure to the Required Information section, with one entry: NO 1, FILE [Module 1.pdf](#), ACTION

At the bottom right of the form, there are 'Back' and 'Next' buttons.

Diagram 84: Form Pre-Vetting

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	64

- ii. Tab Log (Log history of the application):
 - a) Date
 - b) Process
 - c) From
 - d) Status
 - e) Remarks



The screenshot shows the 'Pre-Vetting' interface with a breadcrumb trail: FIMM > CPD > Pre-Vetting. Below the breadcrumb, there are two tabs: 'Details' and 'Log'. The 'Log' tab is selected and highlighted with a red box. The main content area displays a table with the following data:

Date	Process	From	Status	Remarks
07-Mar-2025 09:52:09	T-TPU → F-POSU	Maisarah binti ali	Pending Approval - Update	-
07-Mar-2025 09:50:30	F-POSU → T-TPU	Danial Tester Staging	Pending Update	OK
07-Mar-2025 09:49:04	T-TPU → F-POSU	Maisarah binti ali	Pending Approval	-
07-Mar-2025 09:47:44	T-TPU	Maisarah binti ali	Draft	-

A 'Back' button is visible in the bottom right corner of the interface.

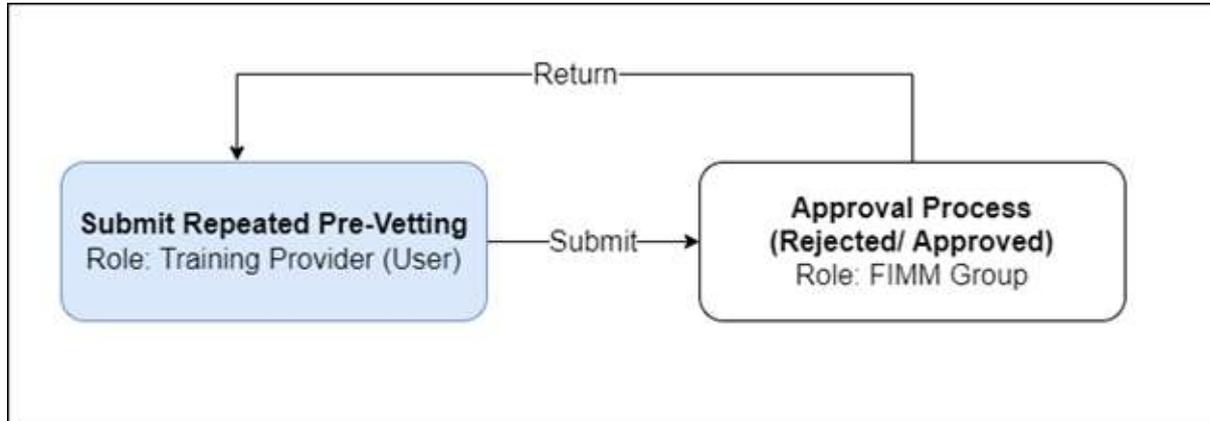
Diagram 85: Log

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	65

3.3 Repeated Pre-Vetting

3.3.1 Create Application

3.3.1.1 Process Flow



	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	66

3.3.1.2 Manual Step

Submit Program

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

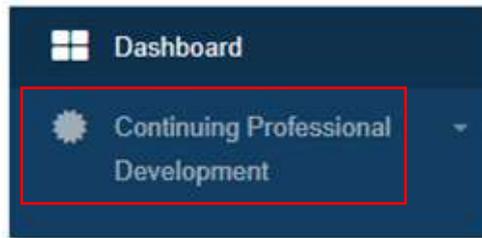


Diagram 86: Menu

2. Click submenu Repeated Pre-Vetting.

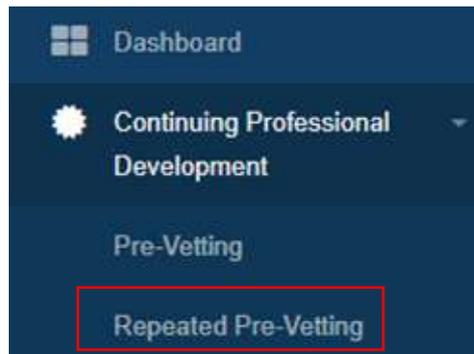


Diagram 87: Submenu

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	67

3. System will show List of Repeated Pre -Vetting.

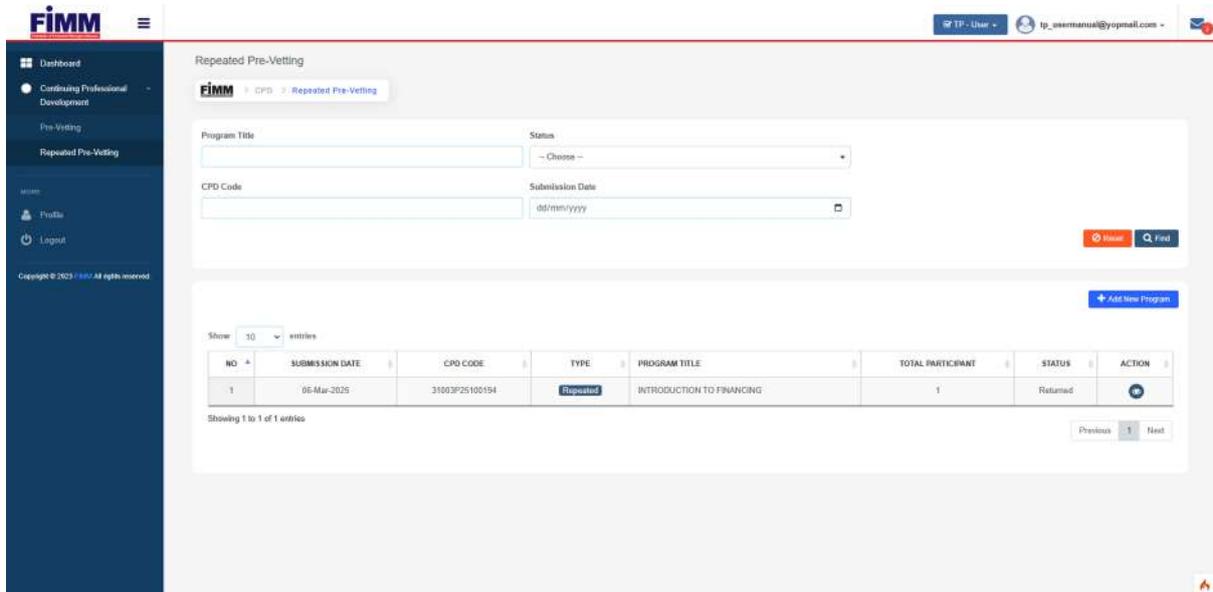
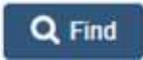


Diagram 88: List of Repeated Vetting

4. User can filter the list by either one or more of and click  :
- i. Program Title
 - ii. Status
 - iii. CPD Code
 - iv. Submission Date

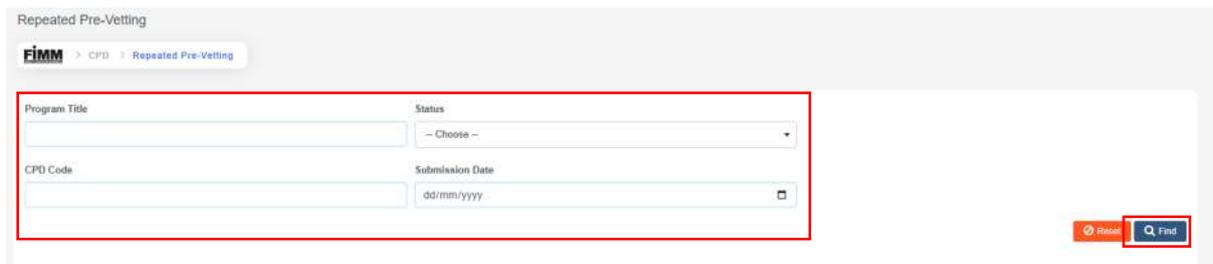
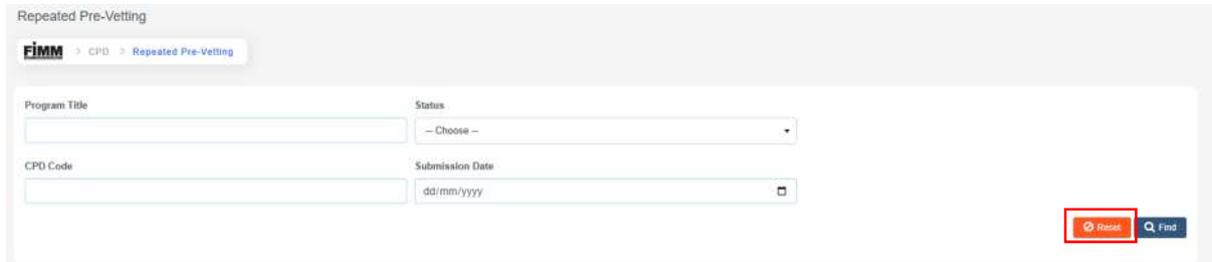


Diagram 89: Filter

FIMM	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia (FIMM)	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	68

5. User click  to clear the filter.



Repeated Pre-Vetting

FIMM > CPD > Repeated Pre-Vetting

Program Title:

Status:

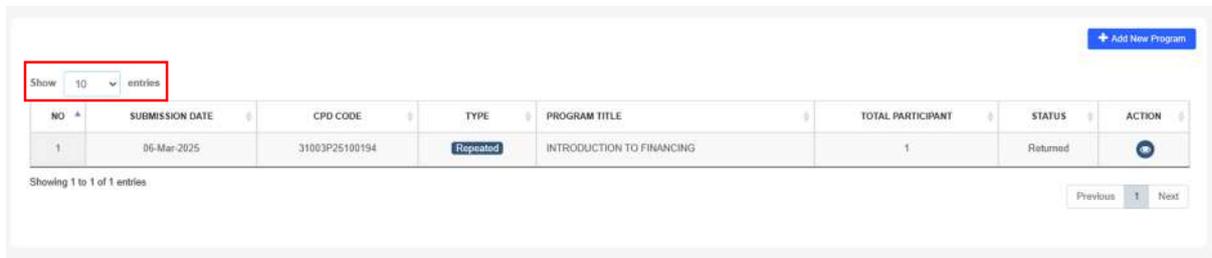
CPD Code:

Submission Date:

Diagram 90: Reset

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



+ Add New Program

Show entries

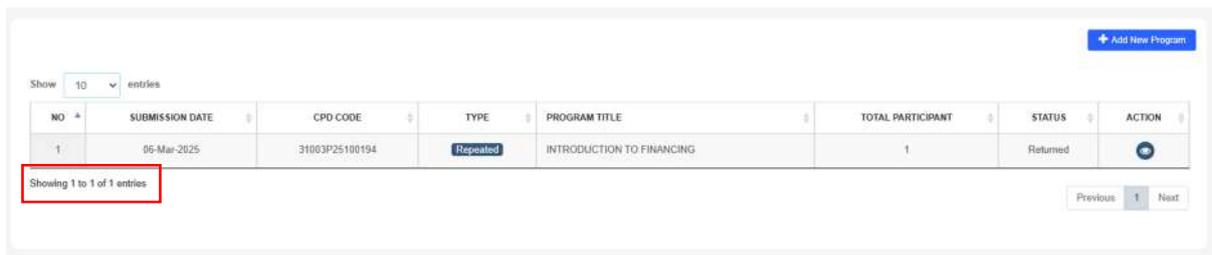
NO	SUBMISSION DATE	CPD CODE	TYPE	PROGRAM TITLE	TOTAL PARTICIPANT	STATUS	ACTION
1	06-Mar-2025	31003P25100194	Repeated	INTRODUCTION TO FINANCING	1	Returned	

Showing 1 to 1 of 1 entries

Previous Next

Diagram 91: Filter Total Entries

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



+ Add New Program

Show entries

NO	SUBMISSION DATE	CPD CODE	TYPE	PROGRAM TITLE	TOTAL PARTICIPANT	STATUS	ACTION
1	06-Mar-2025	31003P25100194	Repeated	INTRODUCTION TO FINANCING	1	Returned	

Showing 1 to 1 of 1 entries

Previous Next

Diagram 92: Total Entries

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	69

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.

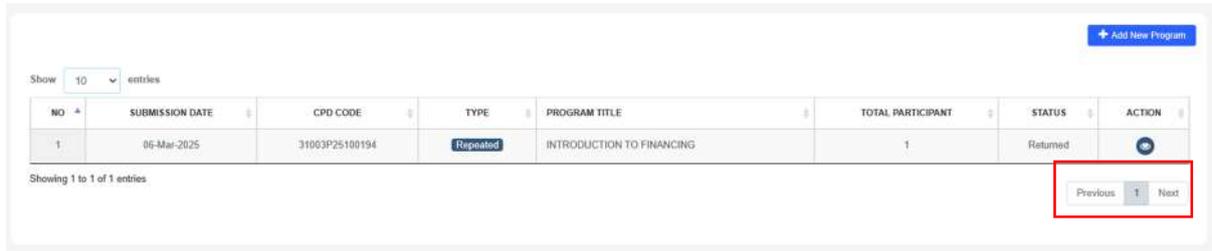


Diagram 93: Pagination

9. Click  to submit new Repeated Pre -Vetting.

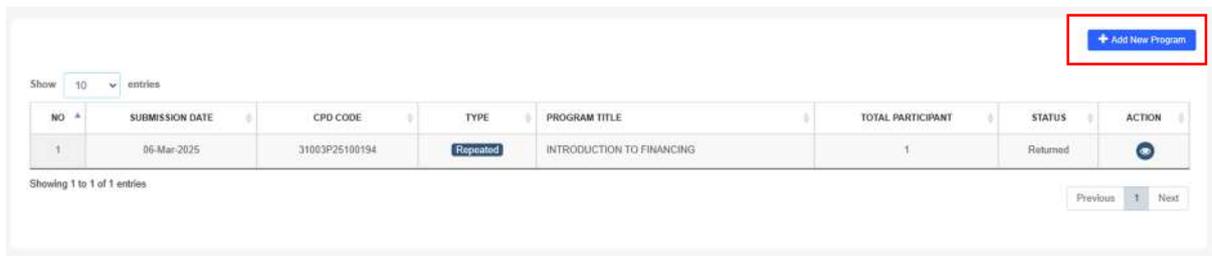


Diagram 94: Submit Repeated Pre-Vetting

FIMM	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	70	

10. System will display this form. User fill in the details:

Diagram 95: Form Repeated Pre-Vetting

- i. Training Provider Details
- ii. Program Details
 - a) Program Title (Choose from Dropdown)

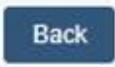
- iii. User click  to go back to List of Repeated Pre-Vetting.

Diagram 96: Popup Message

- iv. User click  to go to the next form.

FIMM	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	71	

11. System will display this form. User fill in the detail in section Program Details.

The screenshot shows the 'Repeated Pre-Vetting' form in the FIMM system. The form is titled 'Repeated Pre-Vetting' and is located under the 'CPD' section. The form is divided into two main sections: 'Training Provider Details' and 'Program Details'. The 'Training Provider Details' section includes fields for 'Training Provider Name' (TRAINING PROVIDER USER MANUAL), 'Training Provider Code' (31003), 'Submitted By' (MAISARAH BINTI ALI), 'Email Address' (TP_USERMANUAL@YOPMAIL.COM), and 'Contact Number' (0112365478). The 'Program Details' section includes a 'Repeated Program' button, 'Program Title' (INTRODUCTION TO FINANCING), 'Start Date' (DD/MM/2025), 'End Date' (DD/MM/YYYY), 'Session' (Choose), 'Venue', 'Total Hours' (8.0), 'CPD Point' (8), 'Mode of Delivery' (PHYSICAL TRAINING PROGRAMMES (FACE TO FACE)), and 'Speakers'. Below these sections are two tables for 'Required Information', each with columns for 'NO', 'FILE', and 'ACTION'. The first table has one row with '1' in the 'NO' column and 'Module 1.pdf' in the 'FILE' column. The second table also has one row with '1' in the 'NO' column and 'Module 1.pdf' in the 'FILE' column. The form also has a sidebar with navigation options and a top navigation bar.

Diagram 97: Form Repeated Pre-Vetting

- i. Training Provider Details
- ii. Program Details
 - a) Program Title
 - b) Start Date
 - c) End Date
 - d) Session
 - e) Venue
 - f) Total Hours
 - g) Mode of Delivery
 - h) CPD Point
 - i) Speakers

FIMM	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia (FIMM)	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	72

iii. User click  to add speaker.

Program Details

Repeated Program

Program Title: INTRODUCTION TO FINANCING

Start Date: DD/MM/2025 End Date: DD/MM/YYYY

Session: -- Choose -- Venue:

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

CPD Point: 8

Speakers: 

Diagram 98: Upload

- iv. System will display a popup.
- a) Add Program Speaker
- Name
 - Profile

Add Program Speaker

Name:

Profile: No file chosen

Diagram 99: Upload

v. User click  to cancel add speaker and close the page.

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	73

vi. User click  to add new speaker.

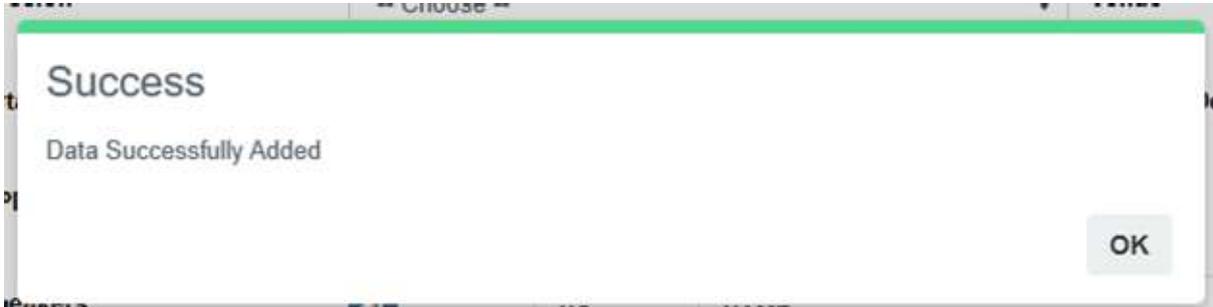


Diagram 100: Popup Message

vii. Required Information
 a) Upload File
 b) Additional Information

viii. User click  to upload file.

Required Information				
Upload File		NO	FILE	ACTION
		1	Module 1.pdf	
Additional Information		NO	FILE	ACTION
		1	Module 1.pdf	

Diagram 101: Upload

Notes:

- Documents from Pre-Vetting is not allowed to be deleted.

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	74

- ix. System will display a popup.
 - a) Upload
 - Upload File

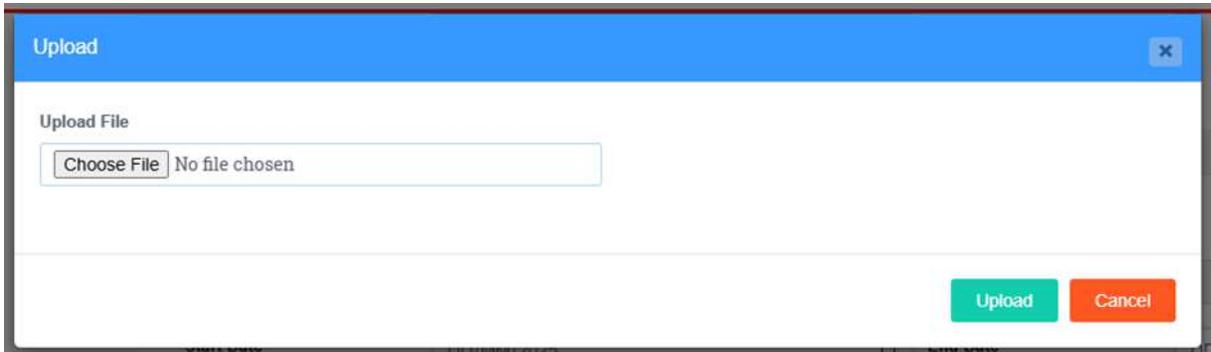


Diagram 102: Upload

- x. User click  to cancel upload and close the page.
- xi. User click  to upload new file.
- xii. System will display error message if the file exceeds 2 MB.

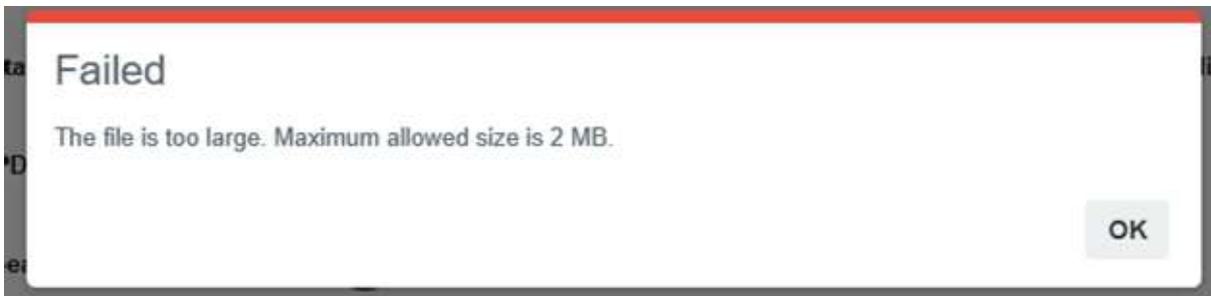
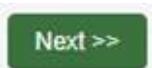


Diagram 103: Error Message

- xiii. User click  to go to the next section.

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	75

12. System will display this form. User fill in the details.

- i. Participant Details
 - a) Upload Feedback
 - b) Upload Participant List
 - c) Tickbox
- ii. User click [Participant list template \(Excel\)](#) to download Participant List Template.



Diagram 104: Upload

- iii. User fill in the participants list.

	A	B	C	D	E	F
1	 SYSTEM NAME: FIMM CORE SYSTEM (FCS) FORM NO: FCS.CPD001 FORM NAME: CPD - CONSULTANT LIST VERSION: V24.001					
2						
3						
4						
5						
6	No	Name	NRIC/ Passport No.	FIMM No.		
7						
8						
9						
10						
11						
12						
13						
14						
15						

Diagram 105: Upload Excel

FIMM	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	76	

iv. System will display error if wrong file type is uploaded for participant list.

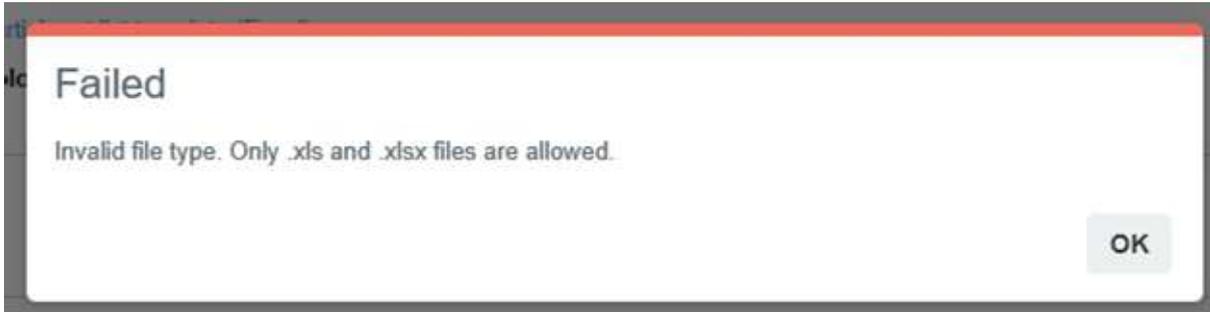


Diagram 106: Error Message

v. System will display the summary if the file is successfully uploaded.

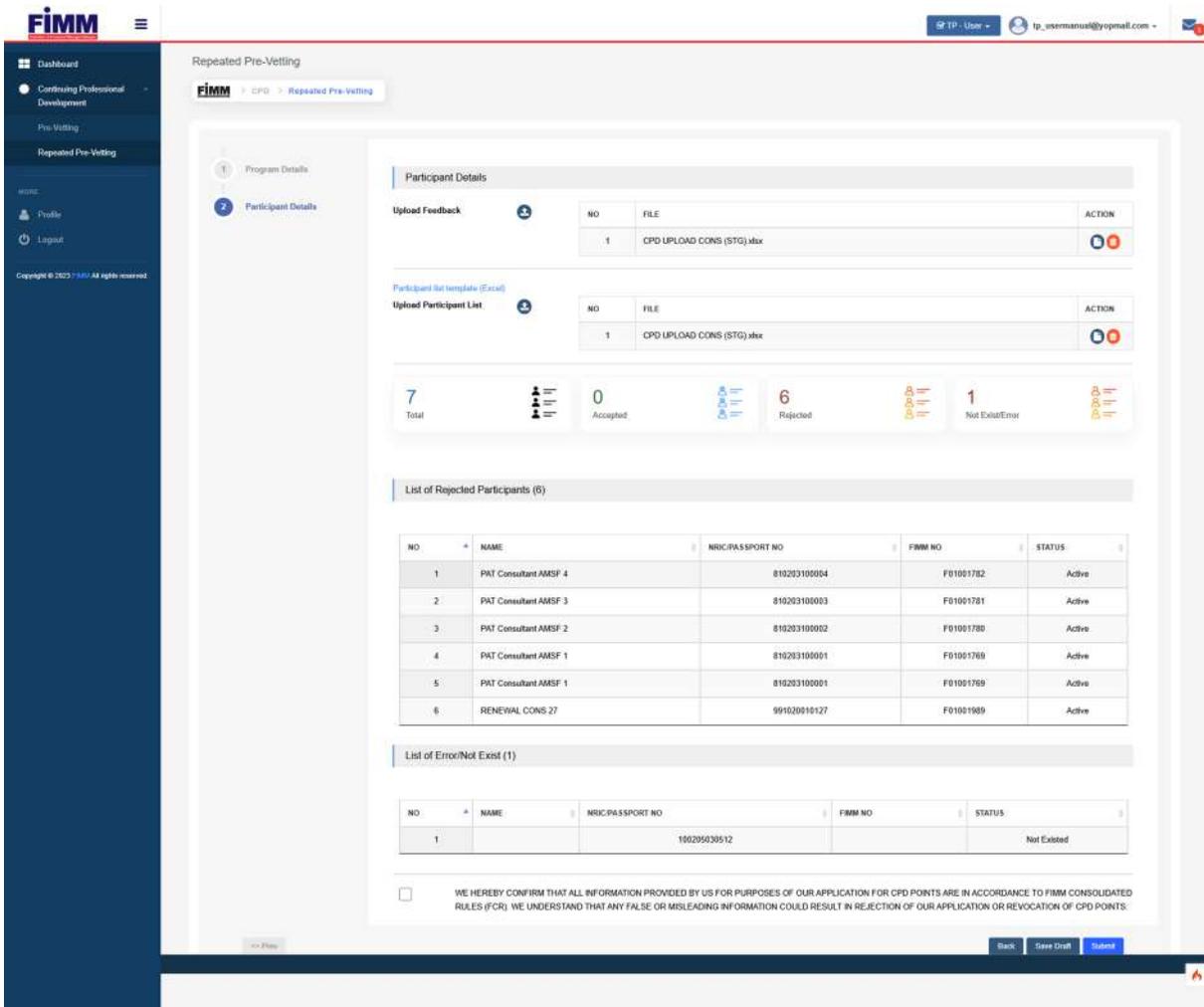


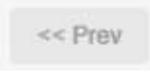
Diagram 107: Form Repeated Pre-Vetting

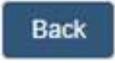
 FIMM <small>Federation of Investment Managers Malaysia</small>	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	77

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	78

Notes:

- List of Participants Accepted – Consultant is registered with FIMM.
- List of Rejected Participants – Duplicate consultant / Participant already take the same program in the same year.
- List of Error/ Not Exist – Consultant is not registered with FIMM.

vi. User click  to go to previous section.

vii. User click  to go back to List of Pre-Vetting.

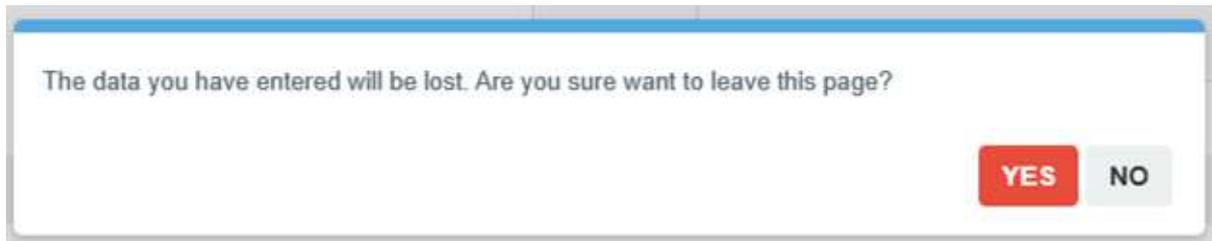
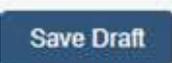


Diagram 108: Popup Message

viii. User click  to save the application as draft.

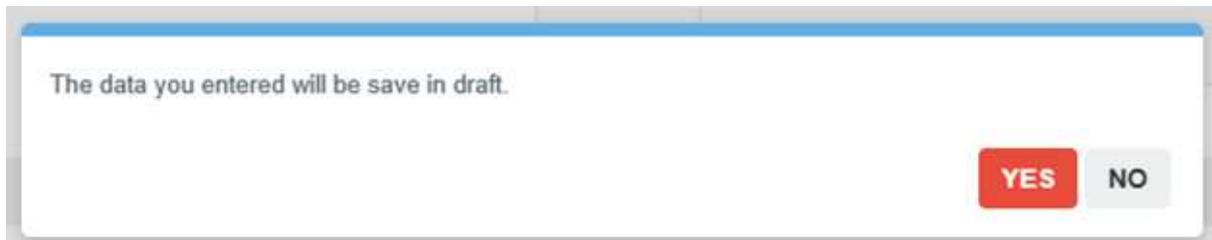


Diagram 109: Popup Message

FIMM	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia (FIMM)	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	79

ix. User click  to submit the application to FIMM.

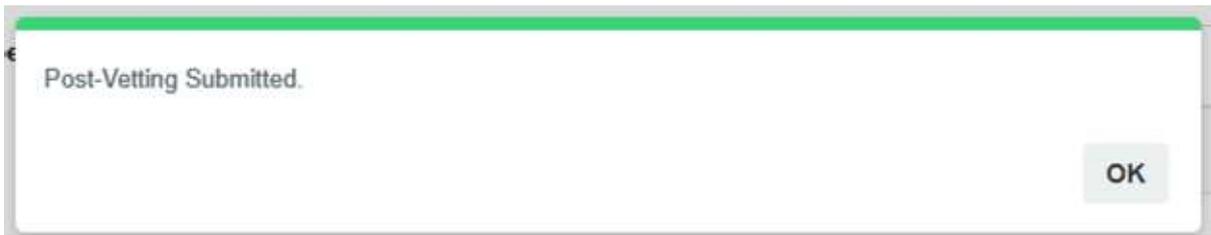
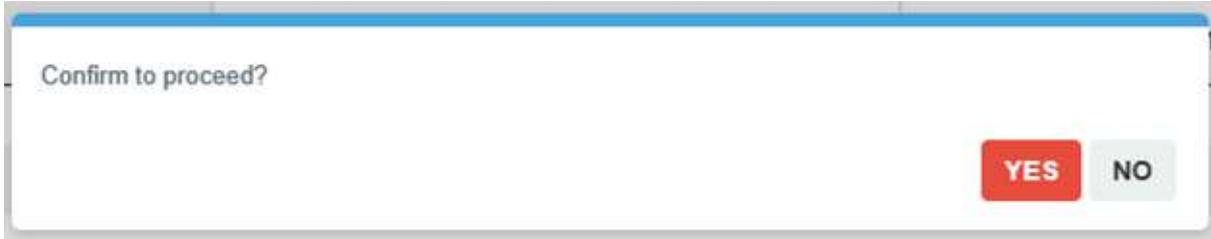


Diagram 110: Popup Message

View Application and Log

13. In List of Repeated Pre-Vetting, user can view applications for all statuses. User click

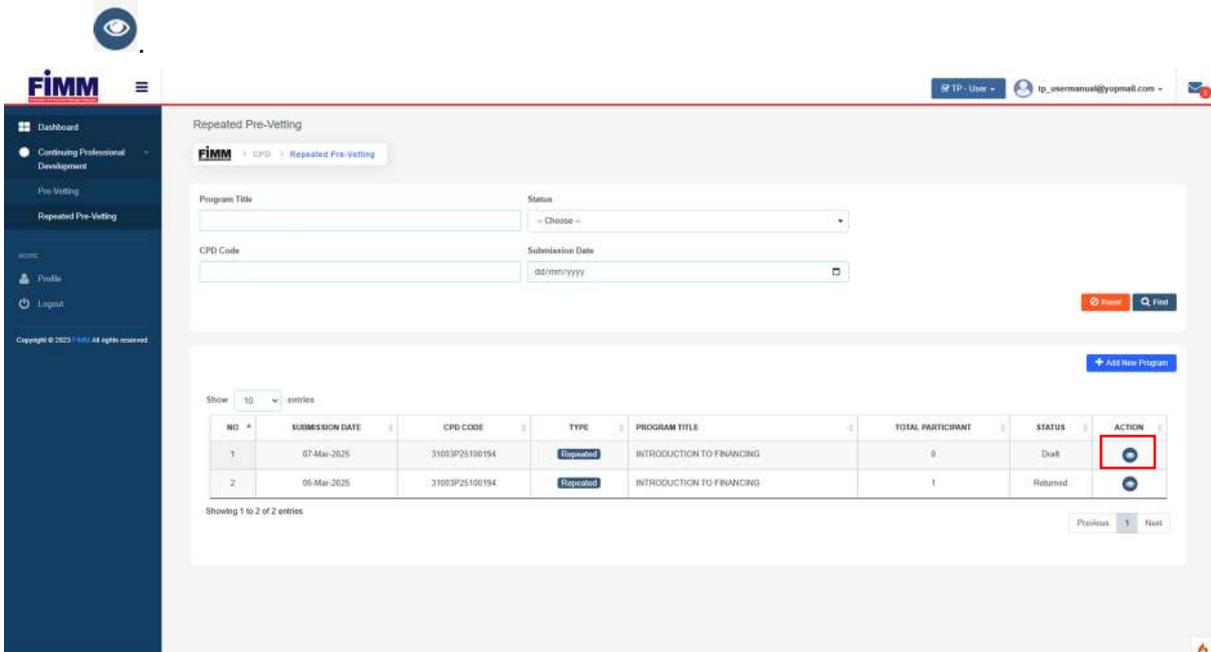
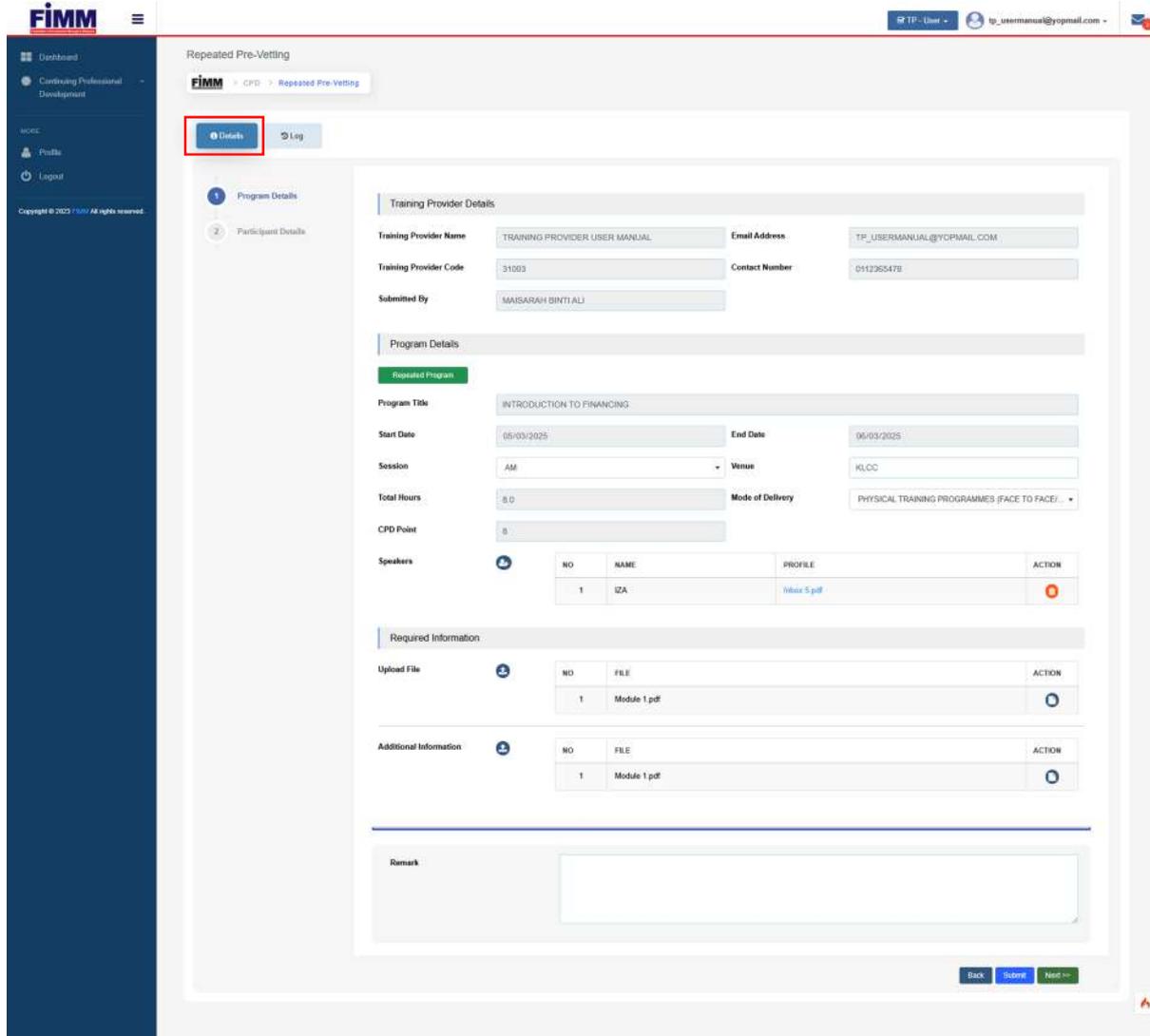


Diagram 111: List of Repeated Pre-Vetting

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	80

14. System will display:

i. Tab Details



The screenshot displays the 'Repeated Pre-Vetting' form in the FIMM system. The 'Details' tab is highlighted with a red box. The form is divided into several sections:

- Training Provider Details:** Includes fields for Training Provider Name (TRAINING PROVIDER USER MANUAL), Email Address (TF_USERMANUAL@YOPMAIL.COM), Training Provider Code (31003), Contact Number (0112365478), and Submitted By (MAISARAH BINTALI).
- Program Details:** Includes a 'Repeated Program' status, Program Title (INTRODUCTION TO FINANCING), Start Date (05/03/2025), End Date (06/03/2025), Session (AM), 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, PROFILE, and ACTION. It contains one entry: NO 1, NAME IZA, PROFILE Izaiz 5.pdf, and ACTION.
- Required Information:** A table with columns NO, FILE, and ACTION. It contains one entry: NO 1, FILE Module 1.pdf, and ACTION.
- Additional Information:** A table with columns NO, FILE, and ACTION. It contains one entry: NO 1, FILE Module 1.pdf, and ACTION.
- Remark:** A large text area for additional notes.

At the bottom right of the form, there are buttons for 'Back', 'Submit', and 'Next >>'. The left sidebar shows navigation options like 'Dashboard', 'Continuing Professional Development', 'Profile', and 'Logout'.

Diagram 112: Form Repeated Pre-Vetting

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	81

- ii. Tab Log (Log history of the application):
 - a) Date
 - b) Process
 - c) From
 - d) Status
 - e) Remarks

Repeated Pre-Vetting

FIMM > CPD > Repeated Pre-Vetting

Details
 Log

Date	Process	From	Status	Remarks
06-Mar-2025 14:19:31	F-PDSU → T-TPU	Danial Tester Staging	Returned	
06-Mar-2025 14:15:22	T-TPU → F-PDSU	Maisarah binti ali	Pending Approval	-
06-Mar-2025 13:13:58	T-TPU	Maisarah binti ali	Draft	-

[Back](#)

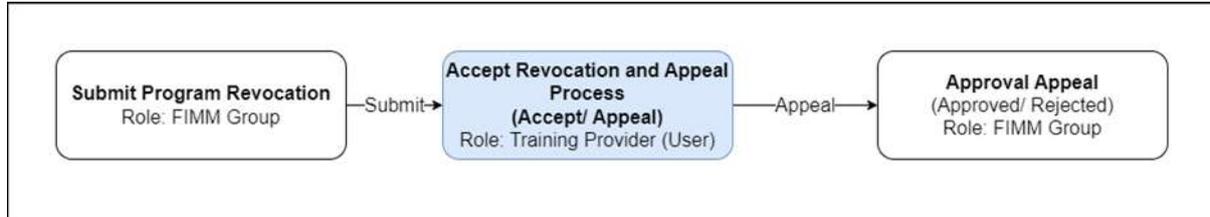
Diagram 113: Log

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	82

3.4 Revocation

3.4.1 Create Application

3.4.1.1 Process Flow



	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	83

3.4.1.2 Manual Step

Accept or Appeal Program Revocation

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

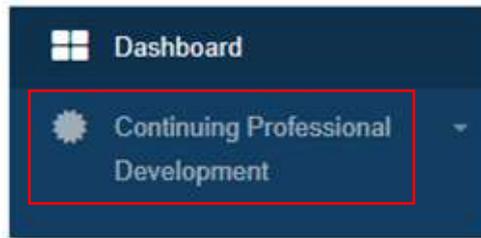


Diagram 114: Menu

2. Click submenu Pre-Vetting.

Notes:

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

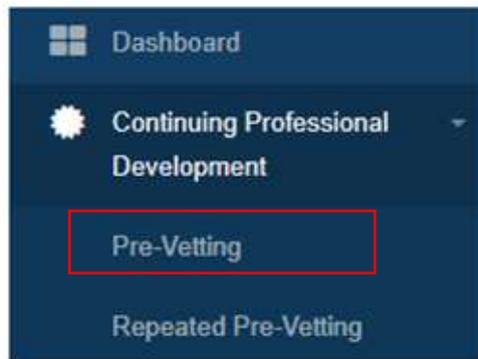


Diagram 115: Submenu

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V.1.0	User Manual Document	1.1	10/04/25	84

3. System will show List of Pre-Vetting.

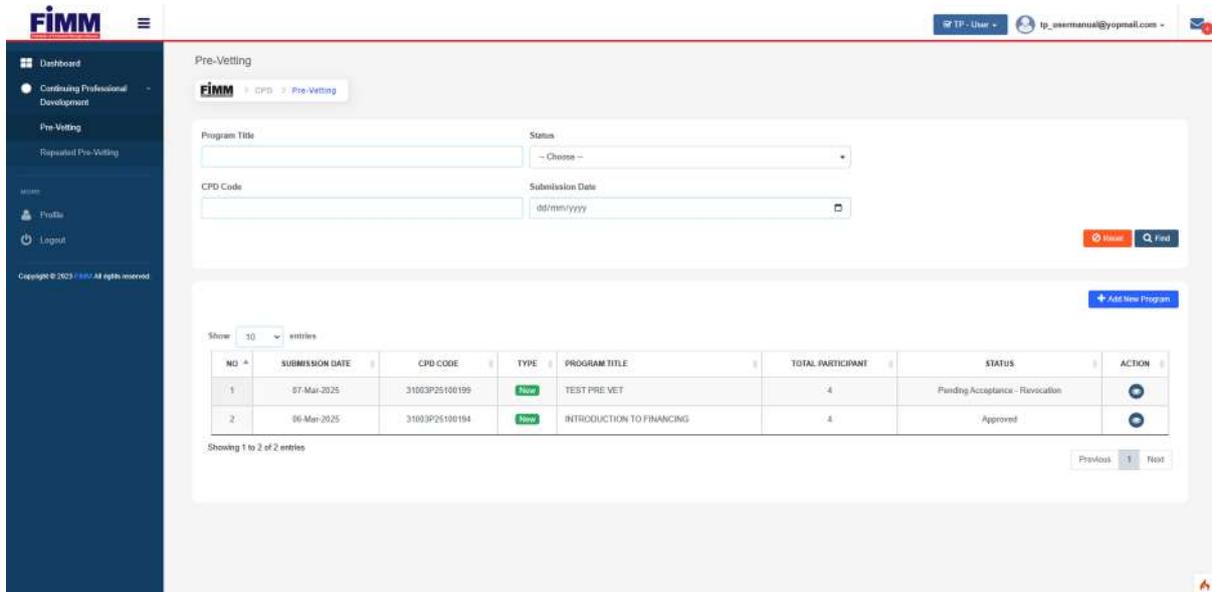


Diagram 116: List of Pre-Vetting

4. In List of Pre-Vetting under column Action, click with approval status Pending Acceptance – Revocation.

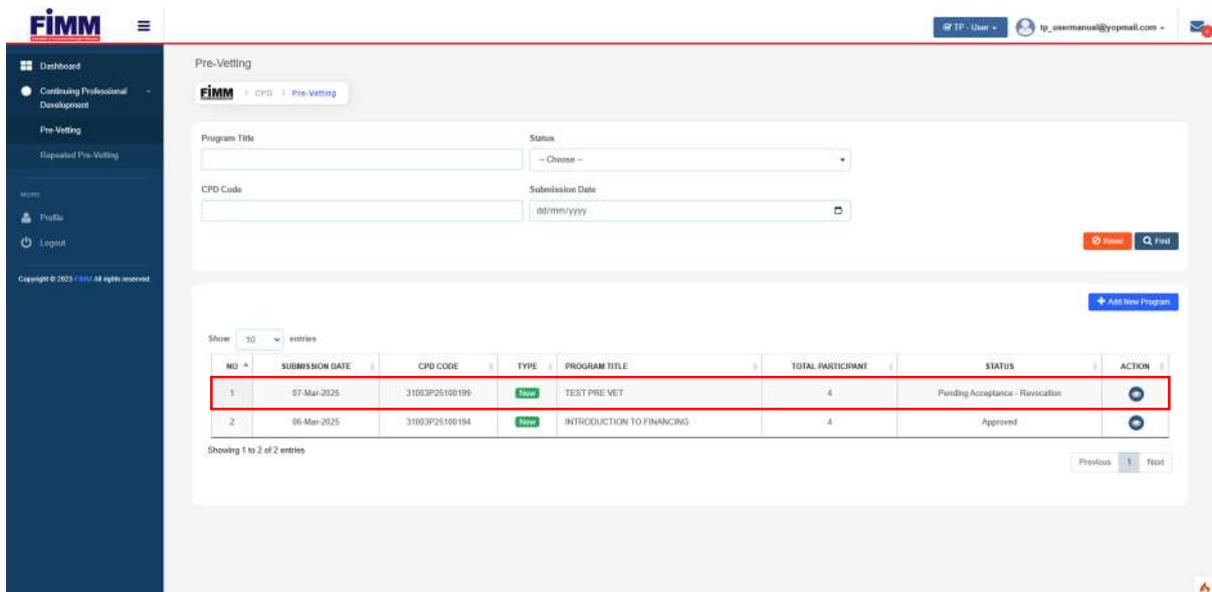


Diagram 117: List of Pre-Vetting

FIMM	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	85	

5. System will display the details.

- i. Tab Details
 - a) Program Revocation Details

The screenshot displays the 'Pre-Vetting' interface for FIMM. The 'Details' tab is highlighted with a red box. The form is divided into several sections:

- Training Provider Details:**
 - Training Provider Name: TRAINING PROVIDER USER MANUAL
 - Training Provider Code: 31003
 - Submitted By: MAISARAH BINTI ALI
 - Email Address: TP_USERMANUAL@YOPMAIL.COM
 - Contact Number: 0112365478
- Program Details:**
 - Program Title: TEST PRE VET
 - Start Date: 08/03/2025
 - End Date: 08/03/2025
 - 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	XCDC	Module 1.pdf
- Required Information:**

NO	FILE	ACTION
1	Module 1.pdf	
- Additional Information:**

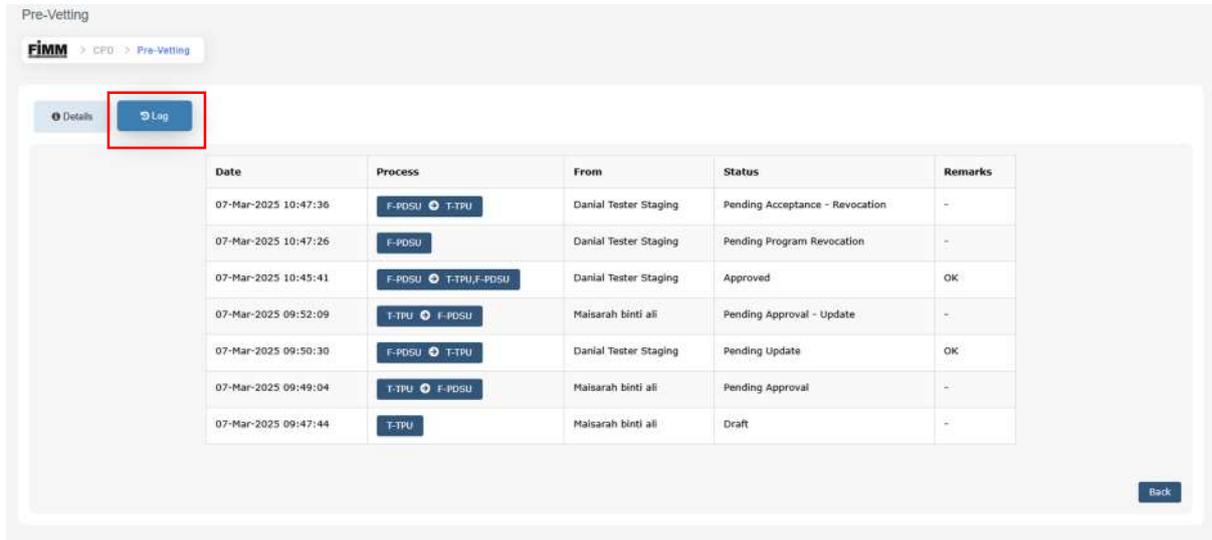
NO	FILE	ACTION
1	Module 1.pdf	
- Program Revocation Details:**
 - Reason: FIMM revoke this program
 - Upload Supporting Document: [Empty field]

At the bottom right, there are buttons for 'Back', 'Approve', 'Request Revocation', and 'Next'.

Diagram 118: Form Program Revocation

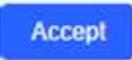
	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	86

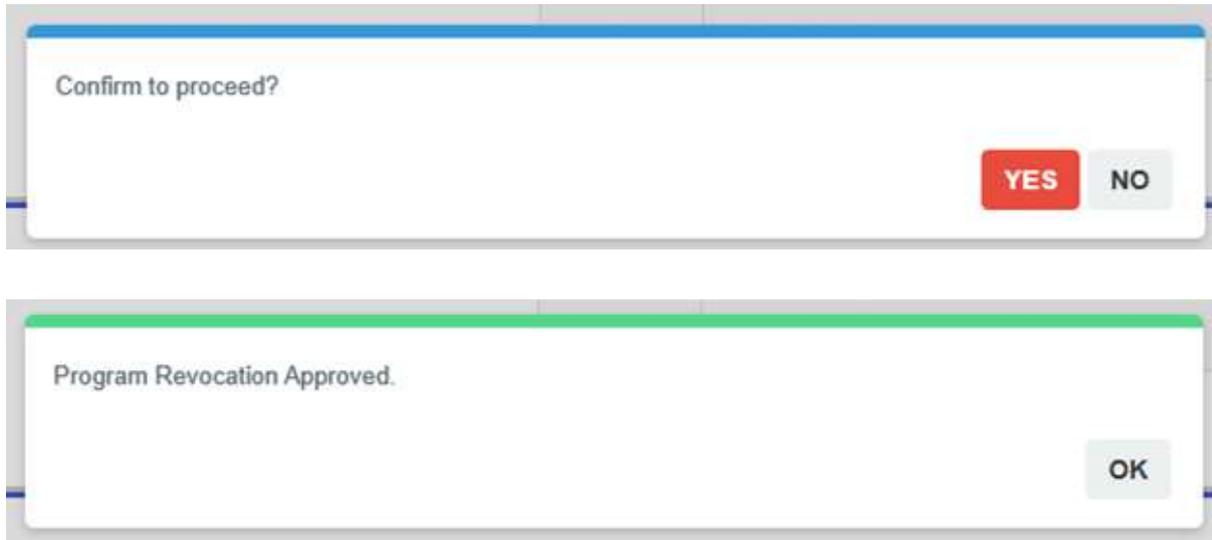
ii. Tab Log (Log History of the application)



Date	Process	From	Status	Remarks
07-Mar-2025 10:47:36	F-PDSU T-TPU	Danial Tester Staging	Pending Acceptance - Revocation	-
07-Mar-2025 10:47:26	F-PDSU	Danial Tester Staging	Pending Program Revocation	-
07-Mar-2025 10:45:41	F-PDSU T-TPU F-PDSU	Danial Tester Staging	Approved	OK
07-Mar-2025 09:52:09	T-TPU F-PDSU	Maisarah binti ali	Pending Approval - Update	-
07-Mar-2025 09:50:30	F-PDSU T-TPU	Danial Tester Staging	Pending Update	OK
07-Mar-2025 09:49:04	T-TPU F-PDSU	Maisarah binti ali	Pending Approval	-
07-Mar-2025 09:47:44	T-TPU	Maisarah binti ali	Draft	-

Diagram 119: Log

iii. User click  to accept the revocation.



Confirm to proceed?

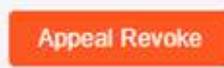
YES NO

Program Revocation Approved.

OK

Diagram 120: Popup Message

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	87

iv. User click  to reject the revocation.

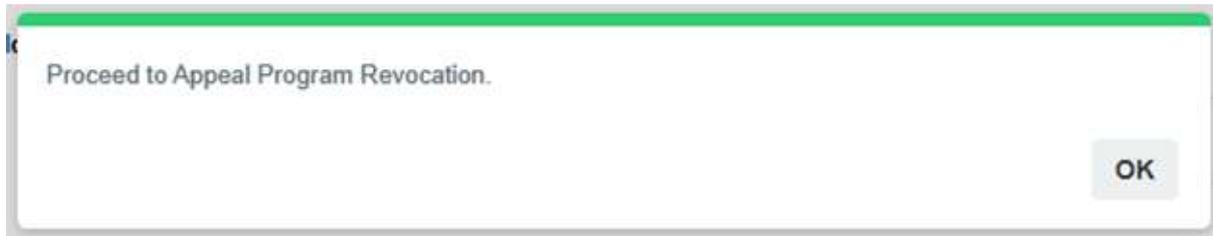
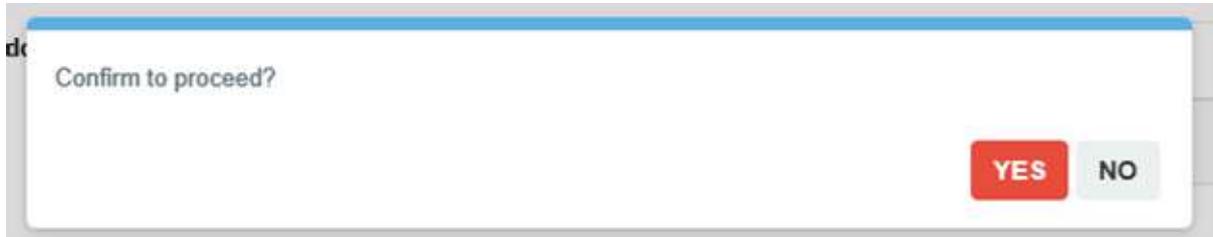


Diagram 121: Popup Message

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

- i. Appeal
 - a) Grounds for Appeal
 - b) Upload Supporting Document



The top part of the form is titled 'Program Revocation Details'. It contains a 'Reason' label followed by a large, empty text input area. Below this is the label 'Upload Supporting Document'.



The bottom part of the form is titled 'Appeal'. It contains a 'Grounds for Appeal' label followed by a large, empty text input area. Below this is the label 'Upload Supporting Document' with a plus icon.

Diagram 122: Form Program Revocation

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	88

ii. User click  to submit the application to FIMM.

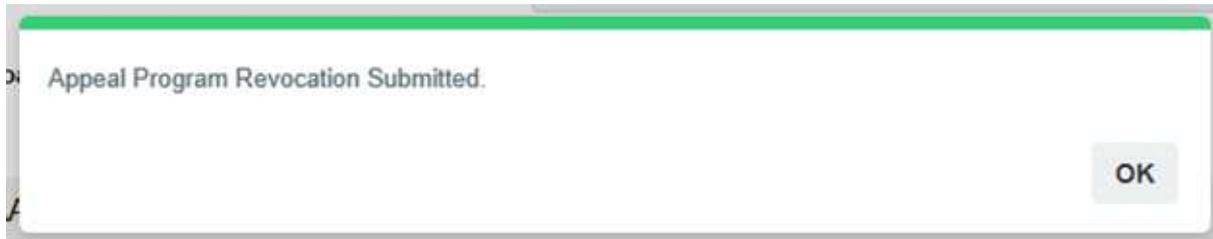
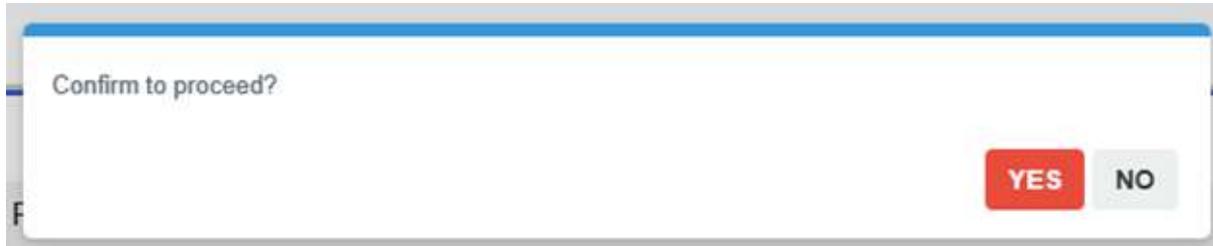


Diagram 123: Popup Message

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

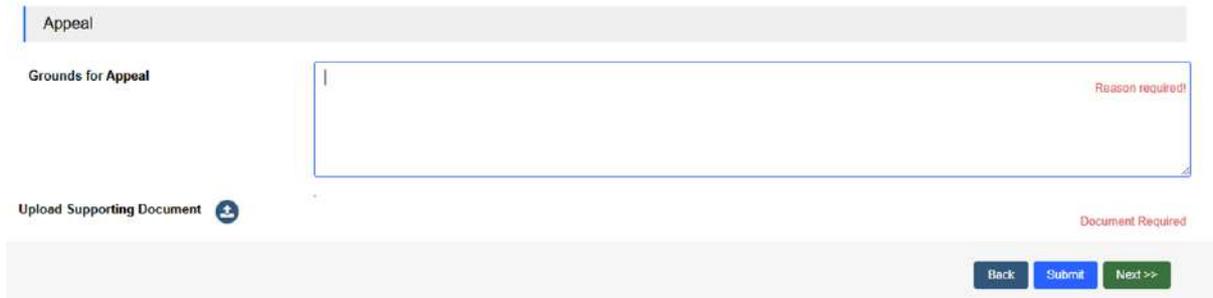


Diagram 124: Form Program Revocation

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	89

3.5 Program Cancellation

3.5.1 Submit Program Cancellation

3.5.1.1 Process Flow



	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	90

3.5.1.2 Manual Step

Cancel Program

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

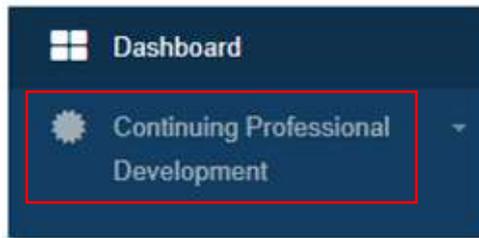


Diagram 125: Menu

2. Click submenu Pre-Vetting.

Notes:

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

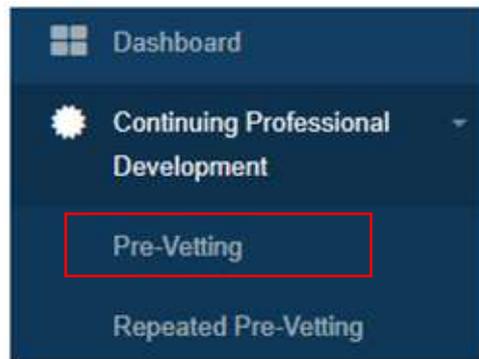


Diagram 126: Submenu

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V.1.0	User Manual Document	1.1	10/04/25	91

3. System will show List of Pre-Vetting.

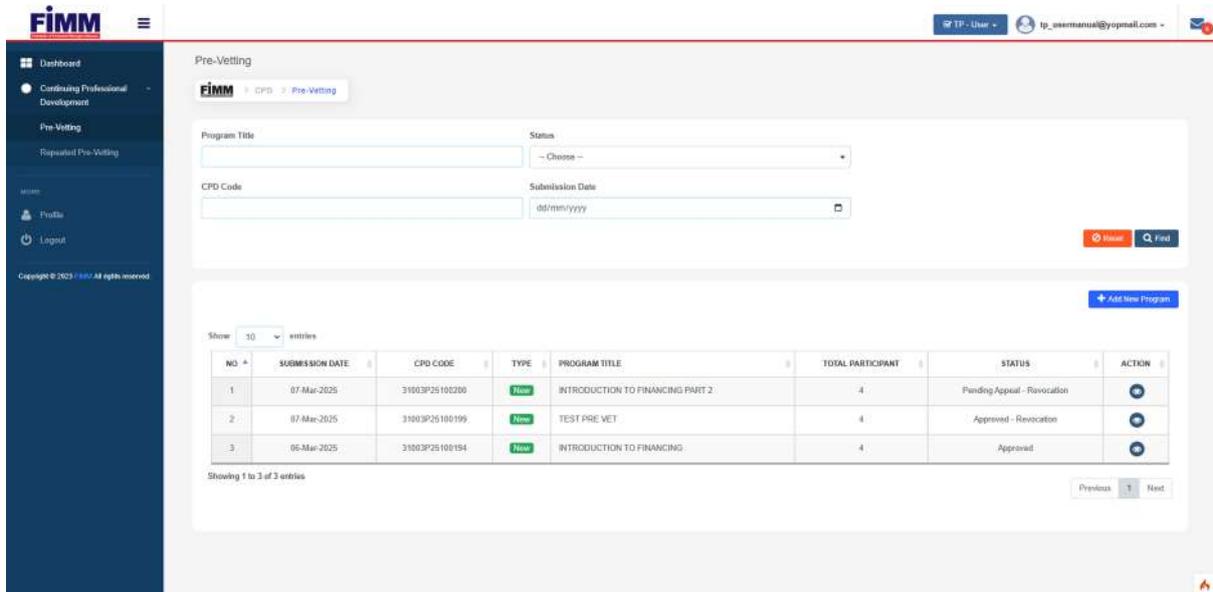


Diagram 127: List of Pre-Vetting

4. Under column Action, user click .

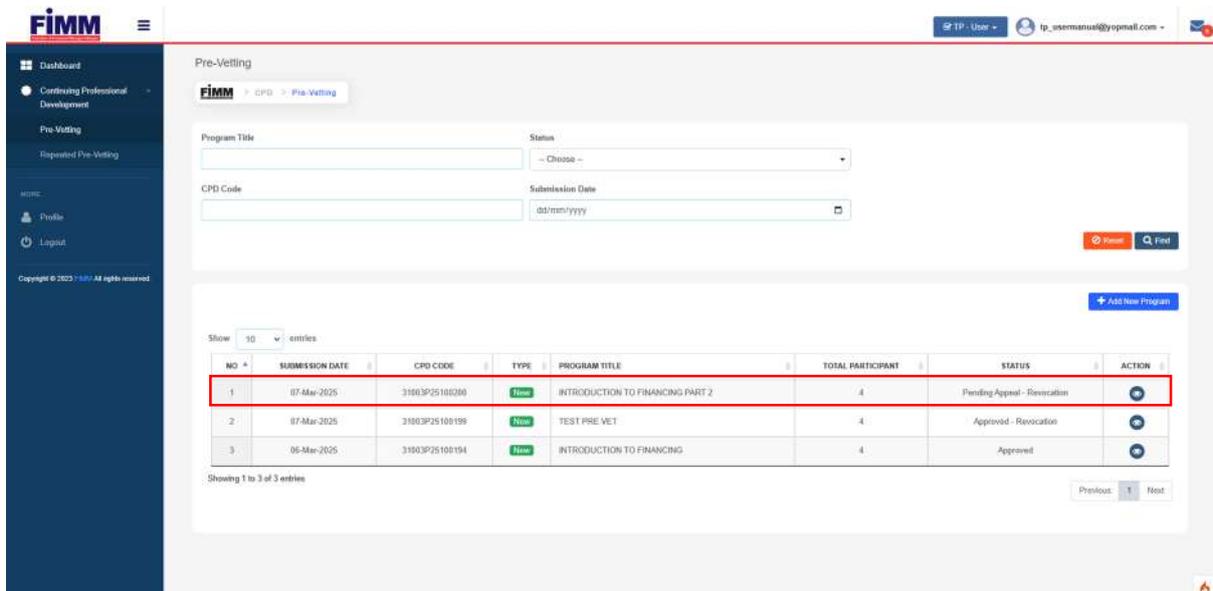
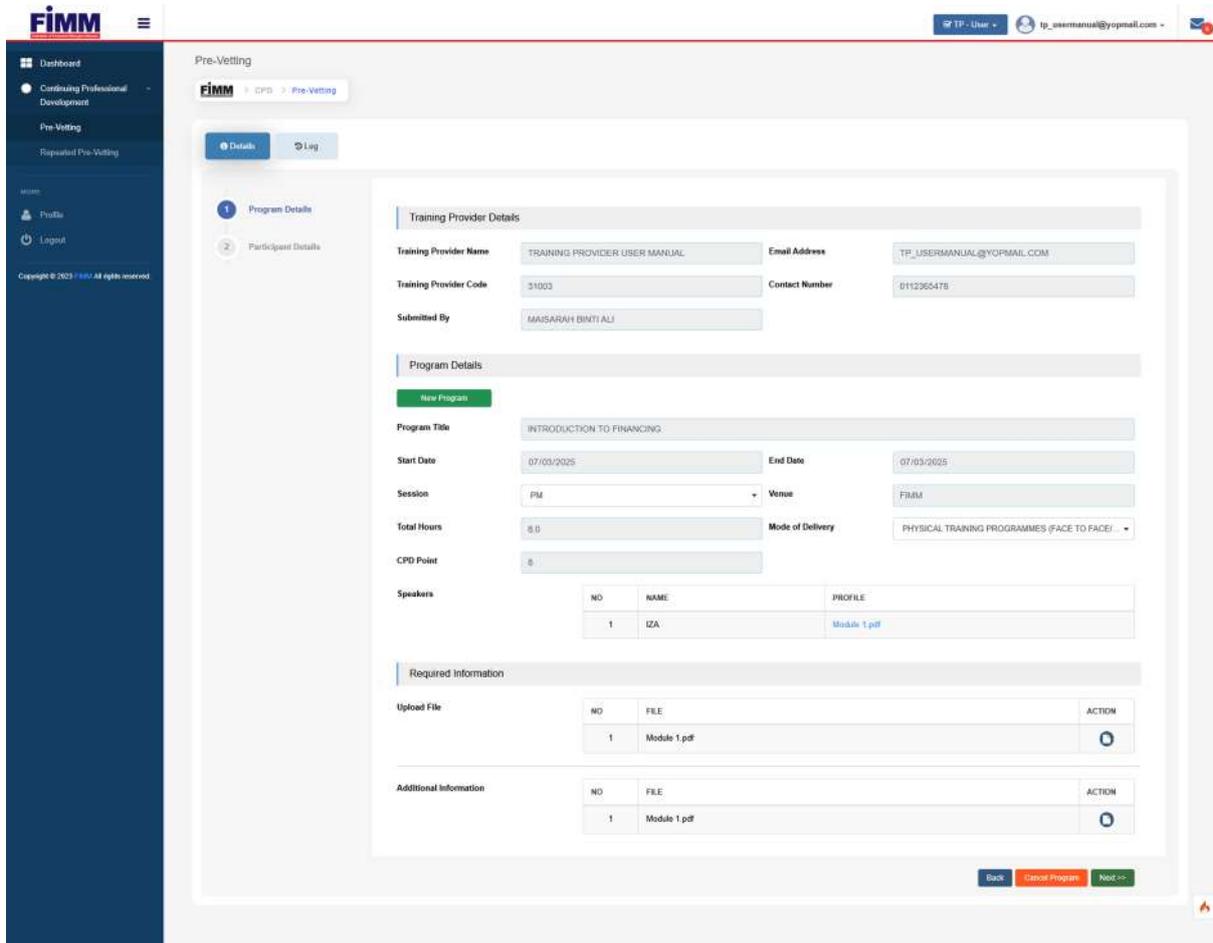


Diagram 128: List of Pre-Vetting

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	92

5. System will display the program details.



The screenshot shows the 'Pre-Vetting' interface in the FIMM system. The main content area is titled 'Pre-Vetting' and contains a 'Details' tab. The form is divided into several sections:

- Training Provider Details:** Includes fields for Training Provider Name (TRAINING PROVIDER USER MANUAL), Email Address (TP_USERMANUAL@YOPMAIL.COM), Training Provider Code (31003), Contact Number (0112365478), and Submitted By (MAISARAH BIMTI ALI).
- Program Details:** Includes a 'New Program' button, Program Title (INTRODUCTION TO FINANCING), Start Date (07/03/2025), End Date (07/03/2025), Session (PM), Venue (FIMM), 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 contains one entry: NO 1, NAME IZA, PROFILE [Module 1.pdf](#).
- Required Information:** A table with columns NO, FILE, and ACTION. It contains one entry: NO 1, FILE [Module 1.pdf](#), ACTION .
- Additional Information:** A table with columns NO, FILE, and ACTION. It contains one entry: NO 1, FILE [Module 1.pdf](#), ACTION .

At the bottom right of the form, there are three buttons: 'Save', 'Cancel Program', and 'New-->'. The left sidebar contains navigation options like 'Dashboard', 'Continuing Professional Development', 'Pre-Vetting', and 'Repeated Pre-Vetting'.

Diagram 129: Form Program Cancellation

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	93

6. User click  to cancel the program.

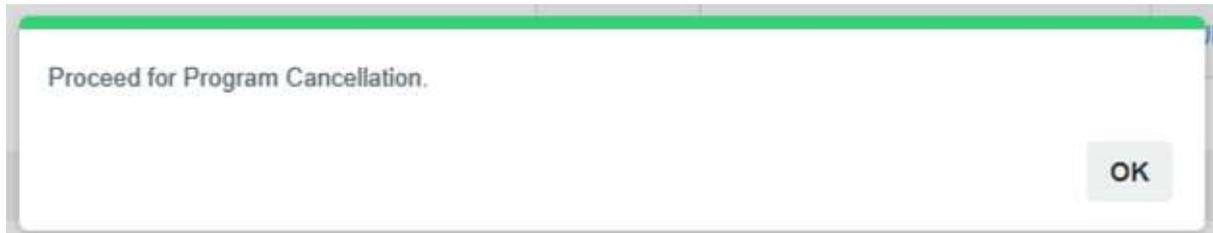
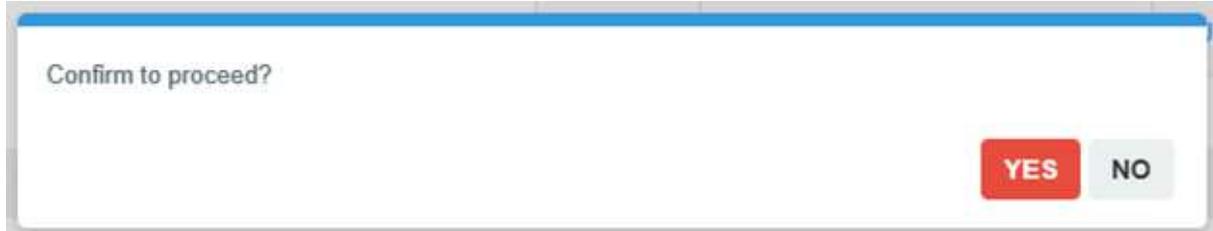


Diagram 130: Popup Message

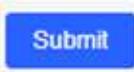
7. System will bring to another form. User fill in details:
- i. Program Cancellation Details
 - a) Reason
 - b) Upload Supporting Document



A screenshot of a web form titled "Program Cancellation Details". It features two main input areas: a text box labeled "Reason" and a file upload area labeled "Upload Supporting Document" with a circular icon. At the bottom right, there are three buttons: "Back", "Submit", and "Next >>".

Diagram 131: Form Program Cancellation

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	94

ii. User click  to cancel the program.

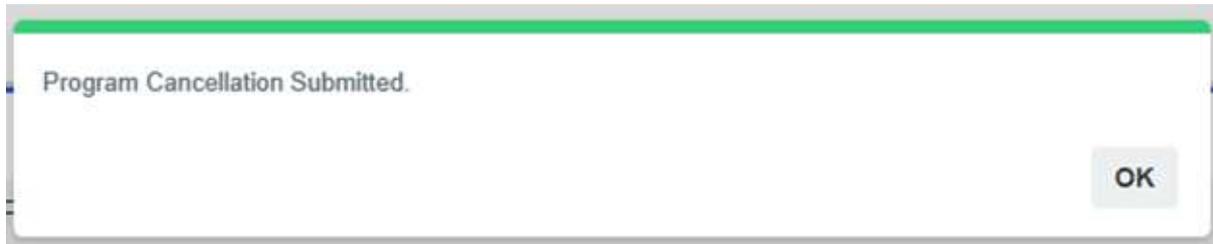
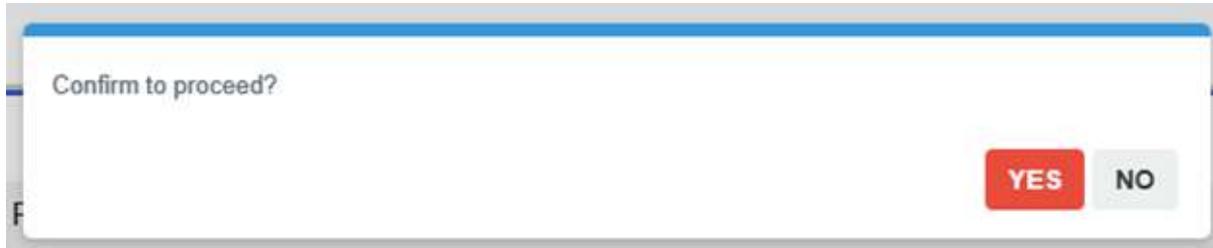


Diagram 132: Popup Message

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



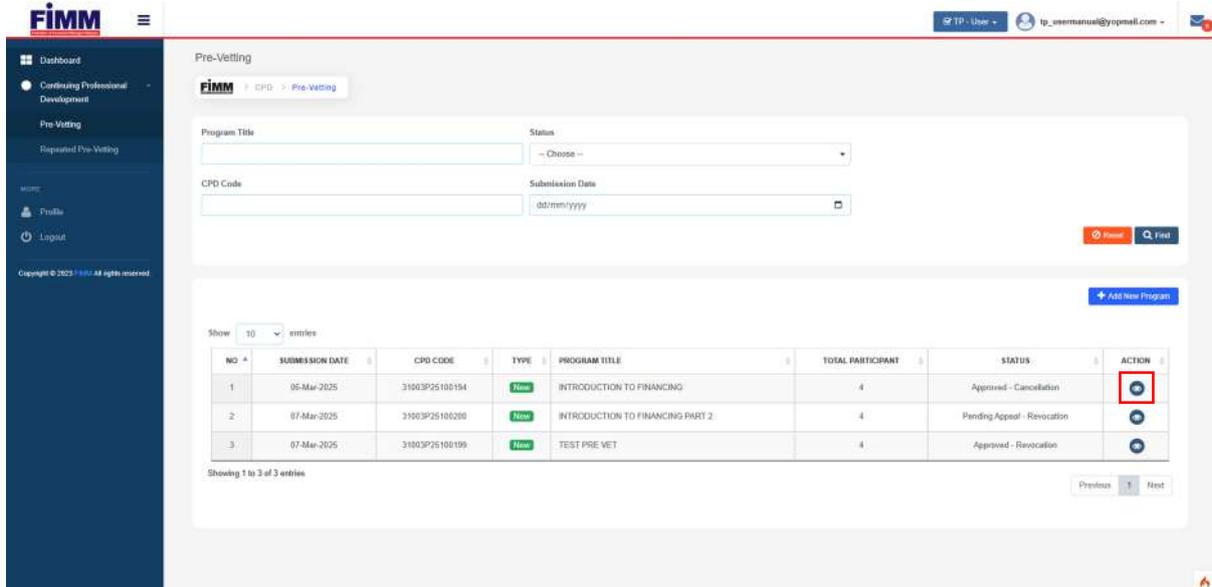
A screenshot of a web form titled "Program Cancellation Details". The form contains a "Reason" label followed by a text input field. The input field is empty and has a red error message "Reason required!" on the right side. Below the input field, there is an "Upload Supporting Document" label with a plus icon and a "Document Required" error message on the right.

Diagram 133: Form Program Cancellation

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V.1.0	User Manual Document	1.1	10/04/25	95

View Application and Log

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



The screenshot displays the 'Pre-Vetting' interface. At the top, there are search filters for Program Title, Status, CPD Code, and Submission Date. Below the filters is a table with the following data:

NO	SUBMISSION DATE	CPD CODE	TYPE	PROGRAM TITLE	TOTAL PARTICIPANT	STATUS	ACTION
1	05-Mar-2025	31003P25100194	New	INTRODUCTION TO FINANCING	4	Approved - Cancellation	
2	07-Mar-2025	31003P25100200	New	INTRODUCTION TO FINANCING PART 2	4	Pending Appeal - Revocation	
3	07-Mar-2025	31003P25100199	New	TEST PRE VET	4	Approved - Revocation	

The 'ACTION' column for the first entry contains an eye icon, which is highlighted with a red box in the original image, indicating that users can click it to view the application status.

Diagram 134: List of Pre-Vetting

FIMM	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia (FIMM)	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	96

9. System will display:
 i. Tab Details

The screenshot displays the 'Pre-Vetting' interface in the FIMM system. The 'Details' tab is highlighted with a red box. The interface is divided into several sections:

- Training Provider Details:**
 - Training Provider Name: TRAINING PROVIDER USER MANUAL
 - Training Provider Code: 31003
 - Submitted By: MAUSARAH BINTI ALI
 - Email Address: TP_USERMANUAL@YCPIMM.COM
 - Contact Number: 0112365478
- Program Details:**
 - Program Title: TEST FIRE VET
 - Start Date: 08/03/2025
 - End Date: 08/03/2025
 - Session: FULL DAY
 - Venue: KJCC
 - Total Hours: 8.0
 - Mode of Delivery: PHYSICAL TRAINING PROGRAMMES (FACE TO FACE)
 - CPD Point: 8
- Speakers:**

NO	NAME	PROFILE
1	XCDC	Module 1.pdf
- Required Information:**

NO	FILE	ACTION
1	Module 1.pdf	
- Additional Information:**

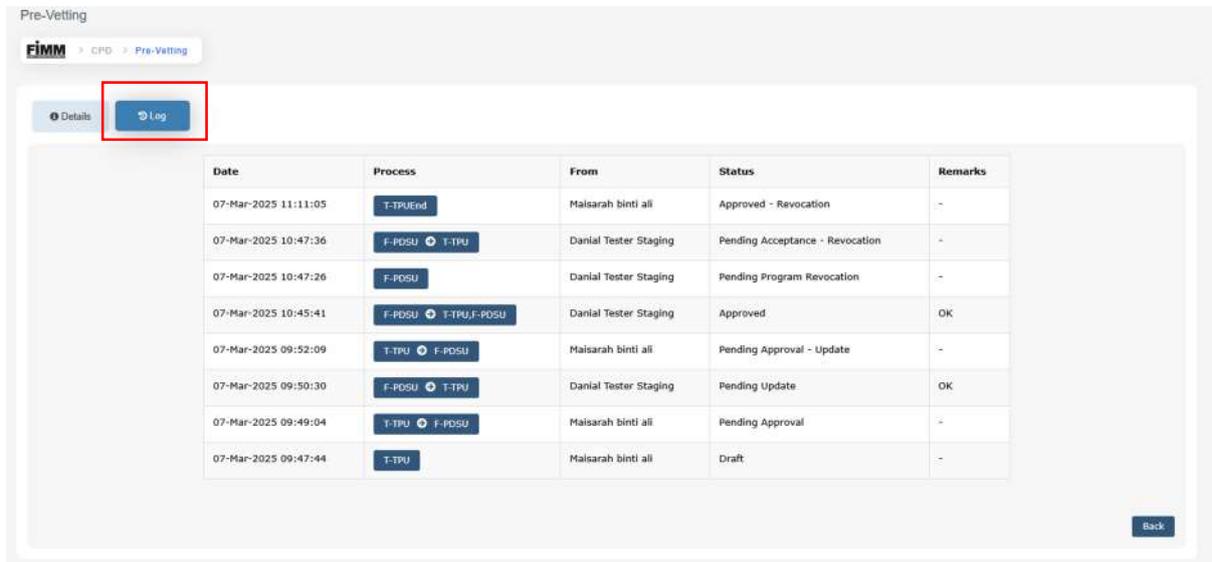
NO	FILE	ACTION
1	Module 1.pdf	
- Program Revocation Details:**
 - Reason: FIMM revoke this program
 - Upload Supporting Document: (empty field)

At the bottom right, there are 'Back' and 'Next >>' buttons.

Diagram 135: Form Program Cancellation

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V1.0	User Manual Document	1.1	10/04/25	97

ii. Tab Log (Log history of the application):



The screenshot shows the 'Pre-Vetting' application interface. At the top left, there is a breadcrumb trail: 'FIMM > CPD > Pre-Vetting'. Below this, there are two buttons: 'Details' and 'Log'. The 'Log' button is highlighted with a red rectangular box. Below the buttons is a table displaying the application log history.

Date	Process	From	Status	Remarks
07-Mar-2025 11:11:05	T-TPUEnd	Maisarah binti ali	Approved - Revocation	-
07-Mar-2025 10:47:36	F-POSU & T-TPU	Danial Tester Staging	Pending Acceptance - Revocation	-
07-Mar-2025 10:47:26	F-POSU	Danial Tester Staging	Pending Program Revocation	-
07-Mar-2025 10:45:41	F-POSU & T-TPU, F-POSU	Danial Tester Staging	Approved	OK
07-Mar-2025 09:52:09	T-TPU & F-POSU	Maisarah binti ali	Pending Approval - Update	-
07-Mar-2025 09:50:30	F-POSU & T-TPU	Danial Tester Staging	Pending Update	OK
07-Mar-2025 09:49:04	T-TPU & F-POSU	Maisarah binti ali	Pending Approval	-
07-Mar-2025 09:47:44	T-TPU	Maisarah binti ali	Draft	-

At the bottom right of the log table area, there is a 'Back' button.

Diagram 136: Log