



# USER MANUAL

## CPD TRACKER SYSTEM (Members)

Version 1.0

25 January 2019

PROVIDED BY



TESS INNOVATION SDN BHD

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## 2 DOCUMENT CONTROL

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1.0	25/1/19	All	

### 3 DOCUMENT APPROVAL

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This is the User Manual Sign off Sheet for CPD Tracker System. The User Manual has been agreed based on the contents by the following duly authorized representatives:

#### AUTHORIZATION FROM TESS INNOVATION SDN BHD

Prepared By		Signature:	
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#### AUTHORIZATION FROM FIMM

Reviewed By		Signature:	
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		Date:	

## **4 PREFACE**

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### **1. Customer & TESS Definition**

FIMM is hereinafter referred as “The Customer” of the one part and TESS Innovation Sdn. Bhd. is hereinafter referred as “TESS” of the other part in this document.

### **2. Document Confidentiality**

This document contains information that is proprietary to TESS and The Customer. This document, or any part thereof, shall not be copied, reproduced, translated or reduced to any electronic medium or machine-readable form or disclosed to any third party without the prior written consent or authorization of TESS and the Customer.

### **3. Purpose of Document**

The purpose of this document is to guide member on how to use CPD Tracker System

### **4. Intended Audience**

- Project team from TESS
- Project team from The Customer

### **5. Document Control**

This document is subject to change control. All changes to this document shall be documented and distributed as “Release Version”. It will consist of the following: -

1. Full replacement of the document; or
2. Full replacement of a section in the document; or
3. An addendum to the document.

Each revision will be assigned with a unique “Release Version” number and date. All pages distributed within a Document Release Notice will have the appropriate Release Version and Release Date indicated.

### **6. Screenshots**

Any screen shots contain in this document are intended for illustrative purpose only and may not match the CPD Tracker System exactly for The Customer. TESS will continue to update screenshots in future versions of the document.

## 7. Disclaimer

All advice given or recommendations made on this document is given or are made in good faith on the basis of the information provided and otherwise generally available or known to TESS at the time of writing. No advice given or statements or recommendations made shall be in any circumstances constitute or be deemed to constitute warranty by TESS as to the accuracy of such advices, statement and recommendations. TESS shall not be liable for any loss, expense, damage or claim arising out of the advice given or not given or statements made or omitted to be made in connection with this document.

## 8. Abbreviation & Definitions

Abbreviation	Definition
FIMM	Federation of Investment Managers Malaysia
CPD	Continuing Professional Development
TESS	TESS Innovation Sdn Bhd
FIS	FIMM Integrated Systems

## 5 CPD PAGES

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### 5.1 CPD Overview

CPD Application menu is a system that allows consultant to keep record of CPD points where member will have to create CPD training program by applying for CPD program accreditation, and assign CPD point. CPD application consists of:

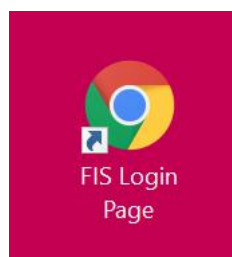
1. CPD Program
2. Writing and Publishing Books/ Articles
3. Reading Approved Financial Literature
4. Teaching/Speaking
5. Academic or Professional Qualification
6. Passing FPAM Modules
7. Waiver from CPD Requirements
8. CPD Participant Query
9. CPD Participant Upload
10. CPD Feedback

### 5.2 Access to CPD System

This part will describe on how to access CPD System. The required steps are as follows:

1. Before user can access to CPD Tracker System, user needs to login at FIS SSO Page first.

Double click on the shortcut for FIS Login Page site as Figure 1. Normally the shortcut will be set up somewhere at the desktop of CPD System's PC.



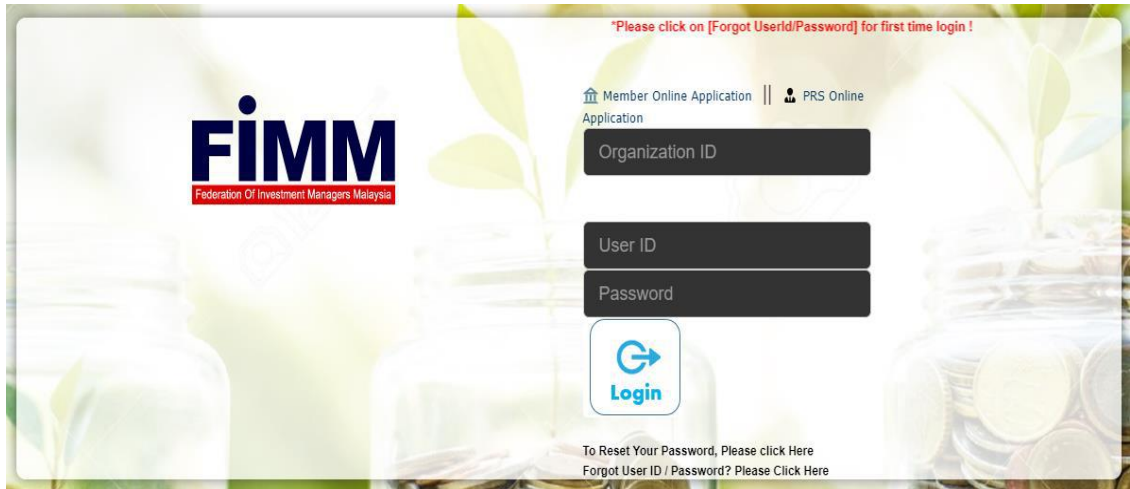
**Figure 1:** FIS Login Page shortcut

2. If the shortcut is not available, please key in the URL as Figure 2 for FIS SSO Site and click "Enter" button. (Kindly get advice from IT regarding the latest CPD Tracker System URL)

<https://i3train.fimm.com.my/FISSSO/iExcelLoginPage.aspx>

**Figure 2:** CPD System URL

3. After clicking enter button, user will see the login screen of FIS SSO as in Figure 3.




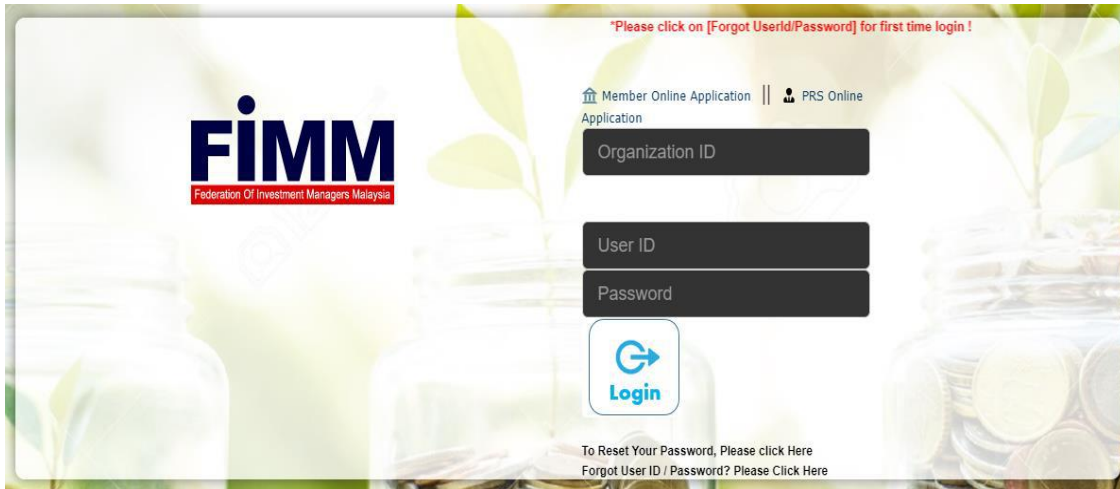
**Figure 3:** FIS Login Page screen

### 5.3 FIS SSO Login Page Screen

This part explains on how to login into FIS SSO. Figure 4 is a login screen for FIS SSO which allows member to login into the FIS SSO systems before accessing to CPD Tracker System. For a login purpose, member requires to insert the details as stated below:

1. Organization ID
2. User ID
3. Password

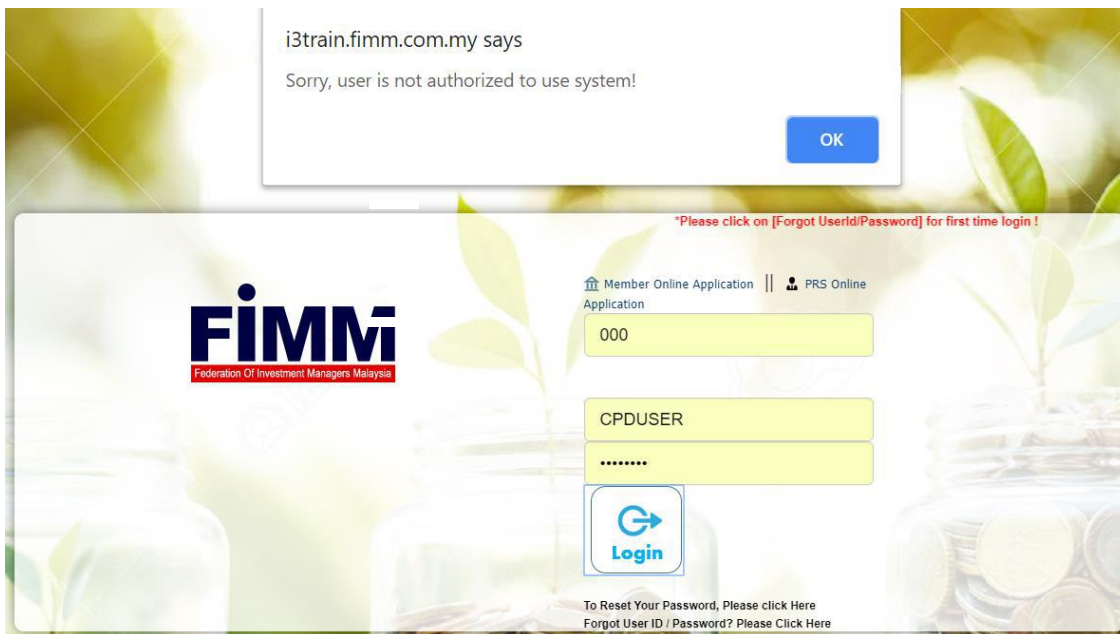
Then, click  icon / enter to access into the FIS SSO.



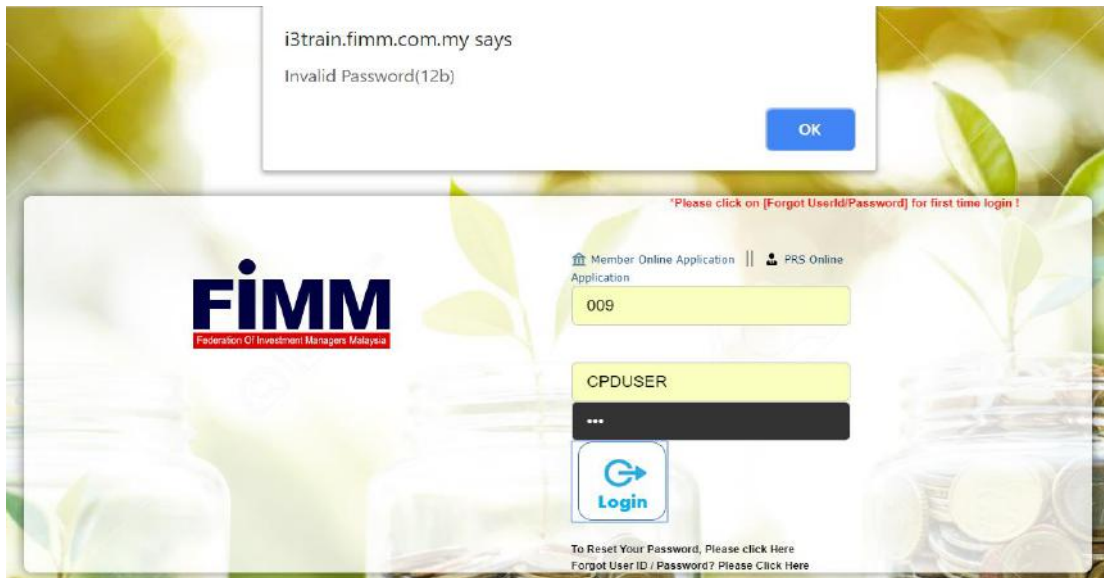
**Figure 4:** FIS SSO Login Page screen

- i. Upon clicked, member will be brought to the FIS SSO main page screen as in Figure 6.


*Exception Flow:* If member enters a wrong Organization ID or User ID or Password, the popup error message will appear as figure 5 (a) and 5 (b)



**Figure 5(a):** Error message for wrongly key-in Organization ID / User ID



**Figure 5(b):** Error message for wrongly key-in password

- ii. To continue, click OK and enter the correct details.
- iii. Then, click  icon / enter to access into the FIS.


## 5.4 FIS SSO Main Page

Figure 6 is a main screen of FIS SSO and it is the 1st screen that will appear upon successful login. On the main screen page, it shows three systems which are I<sup>3</sup> System, PRS System, CPD System and also Logout icon for member to be logged out from FIS SSO.



**Figure 6:** FIS SSO Main Page

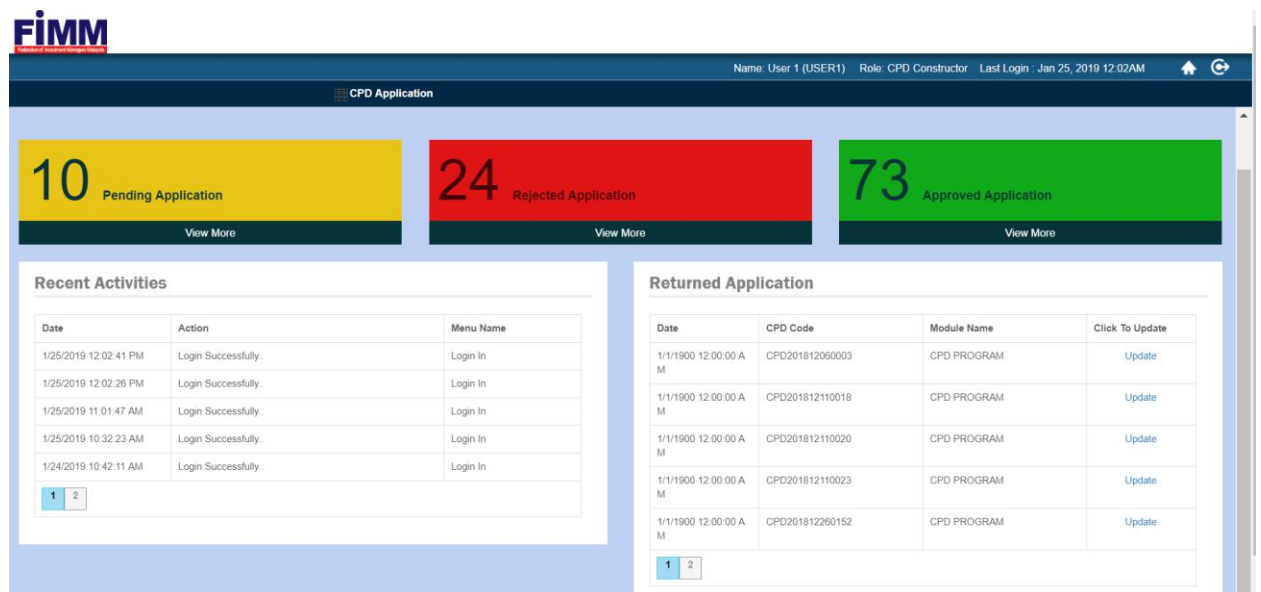


If the member needs to log out from the system, click  icon, and member will be redirecting to the FIS SSO login page.

To get access into CPD System, member needs to click on **CPD SYSTEM** , and member will be redirecting to the CPD Tracker System Main Page as in Figure 7.

## 5.5 CPD Tracker System Main Page

In the CPD Tracker System main page, on the right upper corner, it shows the Name, the role, and the last login details of the member.



**Figure 7:** CPD Tracker System Main Page

In the centre of the main page, there are list of recent activities on the left side and list of returned application on the right side.

For the returned application list, member can view the returned application by clicking on the Update link as in Figure 8, and the member will be redirect to the application page.

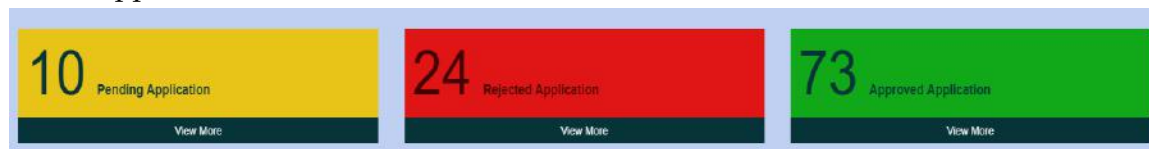
## Returned Application

Date	CPD Code	Module Name	Click To Update
1/1/1900 12:00:00 AM	CPD201812060003	CPD PROGRAM	<a href="#">Update</a>
1/1/1900 12:00:00 AM	CPD201812110018	CPD PROGRAM	<a href="#">Update</a>
1/1/1900 12:00:00 AM	CPD201812110020	CPD PROGRAM	<a href="#">Update</a>
1/1/1900 12:00:00 AM	CPD201812110023	CPD PROGRAM	<a href="#">Update</a>
1/1/1900 12:00:00 AM	CPD201812260152	CPD PROGRAM	<a href="#">Update</a>

1
2

**Figure 8: Update Link**

Besides, the system shows the dashboard for the status of application. There are three colors of dashboard to alert the user for pending, approve, and reject or return application.



**Figure 9: The Dashboard of Application Status**

If the application is pending the dashboard will be yellow. While if the application is approved, the dashboard will be green. The dashboard for rejected or returned application will be red.

To see the dashboard of each application status, click [View More](#), and the dashboard will be expanded as in Figure 10.



**Figure 10: The expanded Dashboard for Rejected Application**

To view the CPD Tracker System, hover the mouse to CPD Application, and the system will display the list of the Applications as in Figure 11.

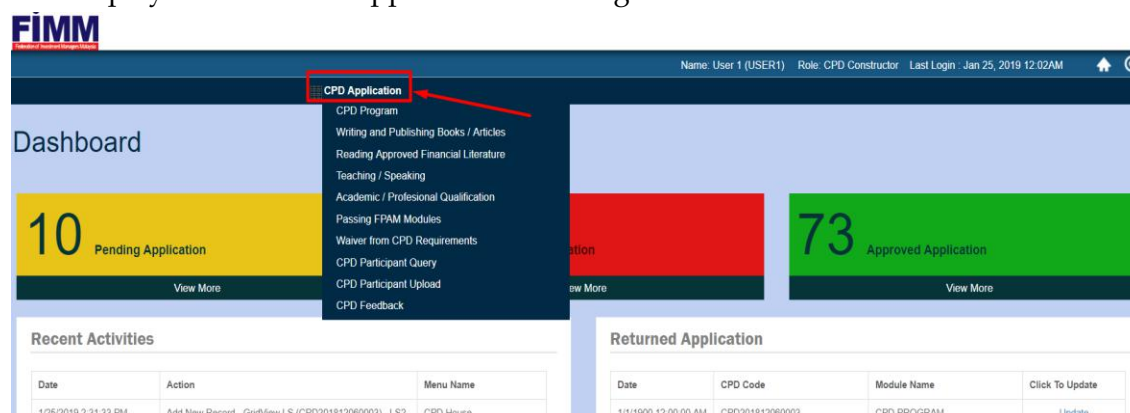


Figure 11: The CPD Application Tab Bar

## 5.6 CPD Application

The CPD Application contains 10 modules as below:

### 5.6.1 CPD Program

The purpose of this module is for member to upload a training program.

To access this screen:

- 1) Hover the mouse to CPD Application
- 2) Select CPD Program and member will be brought to the CPD Program Screen as in Figure 12.

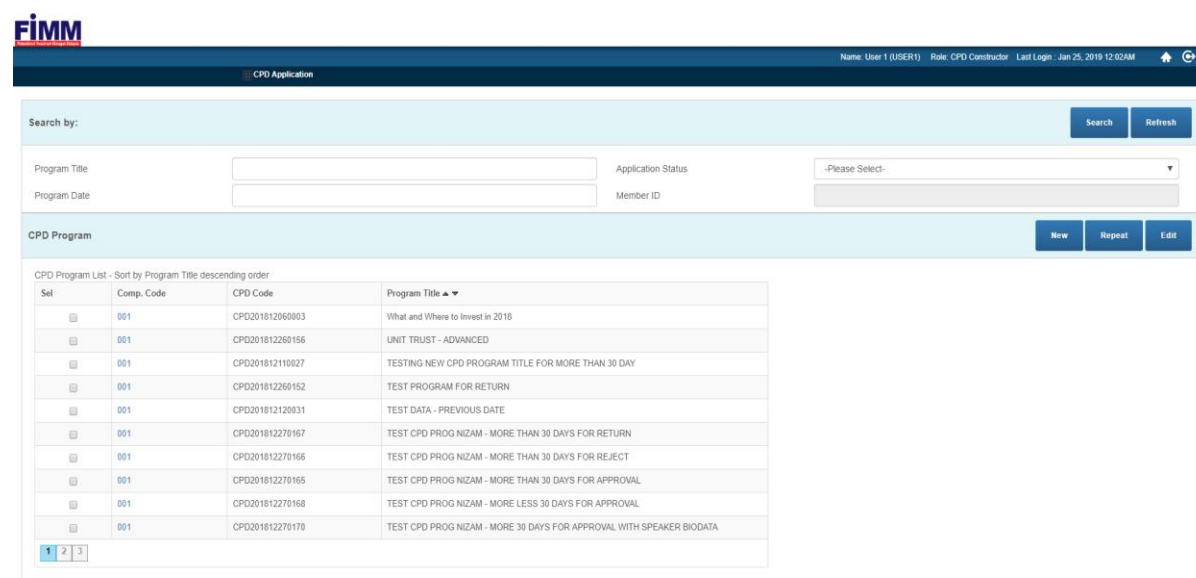


Figure 12: The CPD Program Screen

Throughout this screen:

- i. Member can view the created CPD Program List.

To view the list of programs:

Tick the check box or click on the comp code link as in Figure 13 and system will show another table consisting the list of programs under that program title.

CPD Program List - Sort by Program Title descending order			
Sel	Comp. Code	CPD Code	Program Title
<input checked="" type="checkbox"/>	001	CPD001812060003	What and Where to Invest in 2018
<input type="checkbox"/>	001	CPD001812260156	UNIT TRUST - ADVANCED
<input type="checkbox"/>	001	CPD001812110027	TESTING NEW CPD PROGRAM TITLE FOR MORE THAN 30 DAY
<input type="checkbox"/>	001	CPD001812260152	TEST PROGRAM FOR RETURN
<input type="checkbox"/>	001	CPD001812120031	TEST DATA - PREVIOUS DATE
<input type="checkbox"/>	001	CPD001812270167	TEST CPD PROG NIZAM - MORE THAN 30 DAYS FOR RETURN
<input type="checkbox"/>	001	CPD001812270166	TEST CPD PROG NIZAM - MORE THAN 30 DAYS FOR REJECT
<input type="checkbox"/>	001	CPD001812270165	TEST CPD PROG NIZAM - MORE THAN 30 DAYS FOR APPROVAL
<input type="checkbox"/>	001	CPD001812270168	TEST CPD PROG NIZAM - MORE LESS 30 DAYS FOR APPROVAL
<input type="checkbox"/>	001	CPD001812270170	TEST CPD PROG NIZAM - MORE 30 DAYS FOR APPROVAL WITH SPEAKER BIO DATA

Program Title : What and Where to Invest in 2018		
Sel	Program Date	Status
<input type="checkbox"/>	2018-12-21	Approved
<input type="checkbox"/>	2018-12-25	Approved
<input type="checkbox"/>	2019-01-03	Returned
<input type="checkbox"/>	2019-01-05	Approved
<input type="checkbox"/>	2019-02-04	Approved
<input type="checkbox"/>	2019-02-05	Pending
<input type="checkbox"/>	2019-03-05	Approved
<input type="checkbox"/>	2019-12-22	Rejected
<input type="checkbox"/>	2020-12-21	Approved

Figure 13: CPD Program List

- ii. Member can edit the program details.

To edit the created CPD Program application:

- 1) Tick the check box of the program and click button Edit as in Figure 14.

*Note: To edit the program, the status of application should be only returned otherwise the program cannot be edited.*

- 2) Member then will be brought to the edit CPD program application form as in Figure 15.
- 3) Key-in the details that needs amendment and click save.

CPD Program List - Sort by Program Title descending order			
Sel	Comp. Code	CPD Code	Program Title
<input checked="" type="checkbox"/>	001	CPD001812060003	What and Where to Invest in 2018
<input type="checkbox"/>	001	CPD001812260156	UNIT TRUST - ADVANCED
<input type="checkbox"/>	001	CPD001812110027	TESTING NEW CPD PROGRAM TITLE FOR MORE THAN 30 DAY
<input type="checkbox"/>	001	CPD001812260152	TEST PROGRAM FOR RETURN
<input type="checkbox"/>	001	CPD001812120031	TEST DATA - PREVIOUS DATE
<input type="checkbox"/>	001	CPD001812270167	TEST CPD PROG NIZAM - MORE THAN 30 DAYS FOR RETURN
<input type="checkbox"/>	001	CPD001812270166	TEST CPD PROG NIZAM - MORE THAN 30 DAYS FOR REJECT
<input type="checkbox"/>	001	CPD001812270165	TEST CPD PROG NIZAM - MORE THAN 30 DAYS FOR APPROVAL
<input type="checkbox"/>	001	CPD001812270168	TEST CPD PROG NIZAM - MORE LESS 30 DAYS FOR APPROVAL
<input type="checkbox"/>	001	CPD001812270170	TEST CPD PROG NIZAM - MORE 30 DAYS FOR APPROVAL WITH SPEAKER BIO DATA

Program Title : UNIT TRUST - ADVANCED		
Sel	Program Date	Status
<input checked="" type="checkbox"/>	2019-01-02	Approved

Figure 14: To Edit CPD Program

**FIMM** CPD Application

APPLICATION FOR CPD PROGRAM Edit

**CPD PROGRAM APPLICATION**

Member Code: 001 CPD Code (System Generate): CPD201812060003

Name: None Date: 25-Jan-2019

Company: FIMM Contact No: 0

Designation: None Email: None

Program Title: What and Where to Invest in 2018 Mode of Delivery: Mode 1

Application Type: Repeated CPD Program If other, please specify:

Proposed Dates (START): 2019-01-03 Proposed Dates (END): 2018-12-31

Target Participants: Investors, Unit trust consultants, Financial advisers

Participant's Pre-requisite: Open for all participants who are interest to learn, gain knowledge, and take opportunities in unit

Proposed Fee (per course): 0

Learning Outcomes (LO): To give investors, unit trust consultants and financial advisers the latest insight about global and local market

**Figure 15: Edit CPD program application form**

iii. Member can create New CPD Program.

**Note :** *The date for normal transaction should be more than 30days from training date.*

*The date for ad-hoc transaction should be less than 30days from training date.*

To create New CPD Program application:

- 1) Click the New Button as in Figure 16 and member will be brought to the application CPD Program page as in Figure 17.
- 2) Key-in the details and click the save button at the bottom of the page.

**FIMM** CPD Application

Name: User 1 (USER1) Role: CPD Constructor Last Login: Jan 25, 2019 12:02AM

Search by: Search Refresh

Program Title: Application Status: -Please Select-

Program Date: Member ID:

**CPD Program** New Repeat Edit

CPD Program List - Sort by Program Title descending order

Sel	Comp. Code	CPD Code	Program Title ▲ ▼
<input type="checkbox"/>	001	CPD201812060003	What and Where to Invest in 2018
<input type="checkbox"/>	001	CPD201812260156	UNIT TRUST - ADVANCED
<input type="checkbox"/>	001	CPD201812110027	TESTING NEW CPD PROGRAM TITLE FOR MORE THAN 30 DAY
<input type="checkbox"/>	001	CPD201812260152	TEST PROGRAM FOR RETURN

**Figure 16: To Create New CPD Program**

**FIMM**

Name: User 1 (USER1) Role: CPD Constructor Last Login: Jan 25, 2019 12:02AM

**CPD Application**

**APPLICATION FOR CPD PROGRAM New**

**CPD PROGRAM APPLICATION**

Member Code: 001 CPD Code (System Generate): CPD201901250182

Name: Date: 25-Jan-2019

Company: FIMM Contact No:

Designation: Email:

Program Title: Mode of Delivery: -Please Select-

Application Type: New CPD Program

Proposed Dates (START): Proposed Dates (END):

**Figure 17: Application for CPD Program Page**

iii. Member can repeat to create the approved program.

To repeat the approved program application:

- 1) Tick the check box of the program that is going to be repeated.
- 2) Click the repeated button as in Figure 18 and member will be brought to the CPD program application as in Figure 19 where member need to key in the proposed start and end date of the repeated program.
- 3) Finally, click Save button.

Search by: Search Refresh

Program Title: Application Status: -Please Select-

Program Date: Member ID:

**CPD Program** New Repeat Edit

CPD Program List - Sort by Program Title descending order

Sel	Comp. Code	CPD Code	Program Title
<input checked="" type="checkbox"/>	001	CPD201912060003	What and Where to Invest in 2018
<input type="checkbox"/>	001	CPD201912260156	UNIT TRUST - ADVANCED
<input type="checkbox"/>	001	CPD201912110927	TESTING NEW CPD PROGRAM TITLE FOR MORE THAN 30 DAY
<input type="checkbox"/>	001	CPD201912260152	TEST PROGRAM FOR RETURN
<input type="checkbox"/>	001	CPD201912120931	TEST DATA - PREVIOUS DATE
<input type="checkbox"/>	001	CPD201912270157	TEST CPD PROG NIZAM - MORE THAN 30 DAYS FOR RETURN
<input type="checkbox"/>	001	CPD201912270156	TEST CPD PROG NIZAM - MORE THAN 30 DAYS FOR REJECT
<input type="checkbox"/>	001	CPD201912270155	TEST CPD PROG NIZAM - MORE THAN 30 DAYS FOR APPROVAL
<input type="checkbox"/>	001	CPD201912270158	TEST CPD PROG NIZAM - MORE LESS 30 DAYS FOR APPROVAL
<input type="checkbox"/>	001	CPD201912270170	TEST CPD PROG NIZAM - MORE 30 DAYS FOR APPROVAL WITH SPEAKER BIODATA

Program Title: What and Where to Invest in 2018

Sel	Program Date	Status
<input checked="" type="checkbox"/>	2019-12-21	Approved
<input type="checkbox"/>	2019-12-25	Approved
<input type="checkbox"/>	2019-01-03	Returned
<input type="checkbox"/>	2019-01-05	Approved
<input type="checkbox"/>	2019-02-04	Approved
<input type="checkbox"/>	2019-02-05	Pending
<input type="checkbox"/>	2019-03-05	Approved
<input type="checkbox"/>	2019-12-22	Rejected
<input type="checkbox"/>	2020-12-21	Approved

**Figure 18: To repeat the current program**

APPLICATION FOR CPD PROGRAM Repeated

**CPD PROGRAM APPLICATION**

Member Code	001	CPD Code (System Generate)	CPD201812060003
Name	None	Date	25-Jan-2019
Company	FIMM	Contact No	0
Designation	None	Email	None

Program Title	What and Where to Invest in 2018	Mode of Delivery	Mode 1
Application Type	Repeated CPD Program	If other, please specify	
Proposed Dates (START)	00-000-0000	Proposed Dates (END)	2018-12-25

Target Participants	Investors, Unit trust consultants, Financial advisers
Participant's Pre-requisite	Open for all participants who are interest to learn, gain knowledge, and take opportunities in unit
Proposed Fee (per course)	0
Learning Outcomes (LO)	To give investors, unit trust consultants and financial advisers the latest insight about global and local market

**Figure 19:** To key in Proposed date of the repeated program

iv. Member can search the program by entering the program title or program date or application status

To search for the created program:

1) Key in the program title or program date or application status and the result will be listing as in figure 20

**FIMM**

CPD Application

Name: User 1 (USER1) Role: CPD Constructor Last Login: Jan 25, 2019 4:11PM

Search by:

Program Title	What And Where to Invest	Application Status	-Please Select-
Program Date		Member ID	

CPD Program

New Repeat Edit

CPD Program List - Sort by Program Title descending order

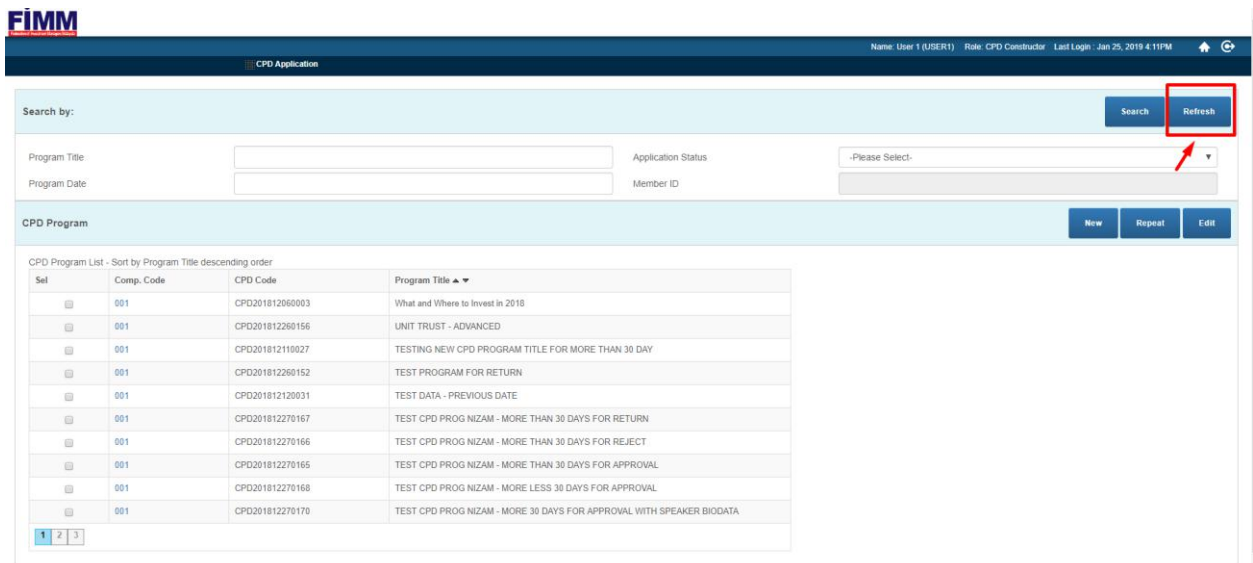
Sel	Comp. Code	CPD Code	Program Title
<input type="checkbox"/>	001	CPD201812060003	What and Where to Invest in 2018
<input type="checkbox"/>	001	CPD201812060004	Repeated Test - What and Where to Invest in 2018

**Figure 20:** To click the Button search program

v. Member can refresh the screen into original as in Figure 21

To refresh the screen into original as in Figure 21:

1) Click on the Refresh Button.



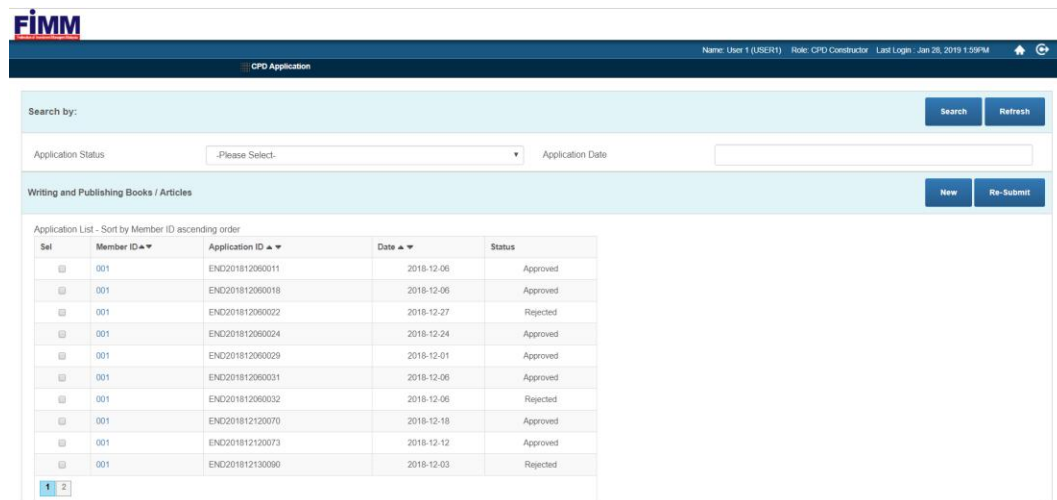
**Figure 21:** To refresh the page into the original screen

## 5.6.2 Writing and Publishing Books/Articles

The purpose of this screen is for member's representative to submit the writing and publishing books/ article made by consultant.

To access this screen:

- 1) Hover the mouse to CPD Application
- 2) Select Writing and Publishing Books/ Articles and member will be brought to the Writing and Publishing Books/ Articles Screen as in Figure 22.



**Figure 22:** Writing and Publishing Books/ Articles Screen

Throughout this screen:

- i. Member can view the details of the writing and publishing books/ article made by constructor.

To view the details of the writing and publishing books/ article made by constructor:

- 1) Tick the checkbox or select the comp code link, and the details of the books/article will be shown as in Figure 23.

The screenshot shows the FIMM CPD Application interface. At the top, there's a header with the FIMM logo and user information: Name: User 1 (USER1), Role: CPD Constructor, Last Login: Jan 28, 2019 1:59PM. Below the header, there's a search bar and a dropdown for Application Status. The main section is titled 'Writing and Publishing Books / Articles'. It contains a table with columns: Sel, Member ID, Application ID, Date, and Status. The table lists several applications, with the one having Application ID END201812060032 highlighted. To the right of the table, there's a detailed view of the selected application, showing fields like Member ID, Application ID, Date, Name, Company, Contact No, Designation, Email, Status, Remark, Created User, Created Date Time, Modified User, and Modified Date Time.

Sel	Member ID	Application ID	Date	Status
<input type="checkbox"/>	001	END201812060011	2018-12-06	Approved
<input type="checkbox"/>	001	END201812060018	2018-12-06	Approved
<input checked="" type="checkbox"/>	001	END201812060022	2018-12-27	Rejected
<input type="checkbox"/>	001	END201812060024	2018-12-24	Approved
<input type="checkbox"/>	001	END201812060029	2018-12-01	Approved
<input type="checkbox"/>	001	END201812060031	2018-12-06	Approved
<input checked="" type="checkbox"/>	001	END201812060032	2018-12-06	Rejected
<input type="checkbox"/>	001	END201812120070	2018-12-18	Approved
<input type="checkbox"/>	001	END201812120073	2018-12-12	Approved
<input type="checkbox"/>	001	END201812130090	2018-12-03	Rejected

**Application Details**

Member ID: 001  
 Application ID: END201812060022  
 Date: 2018-12-27  
 Name: MR BLACK  
 Company: FIMM  
 Contact No: 9607777  
 Designation: SENIOR MANAGER  
 Email: SHAHRUL@FIMM.COM.MY  
 Status: Rejected  
 Remark: REJECT  
 Created User: 001FIMMCREATE1  
 Created Date Time: 27-Dec-2018  
 Modified User: 001FIMMAPP1  
 Modified Date Time: 27-Dec-2018

Figure 23: Writing and Publishing Books/ Articles Screen details

- ii. Member can create new Writing and Publishing Books/ Articles made by constructor.

To create new Writing and Publishing Books/ Articles made by constructor:

- 1) Click on **New** to insert application details and member will be redirecting to the screen as in figure 24.

The screenshot shows the FIMM CPD Application interface for creating a new application. The header is the same as Figure 23. The main section is titled 'Application for Writing and Publishing Books / Articles - New'. It contains a form with fields for Member Code, Name, Company, Designation, Application Code, Date, Contact No, and Email. Below the form, there are two sections for adding new records: 'Writing Books - 16 Points' and 'Writing Articles - 4 Points for each article (Max 8 CPD points)'. Each section has a table with columns: NRIC, Applicant Name, FIMM No, Book Title, Published Date, Publisher, and Attachment. There are 'Add Name' buttons and 'Choose File' links for each record. At the bottom, there are 'Save', 'Reset', and 'Back' buttons.

Figure 24: Create new Writing and Publishing Books/ Articles

- 2) Insert applicant information on writing books and click on **Choose File** to upload the attachment.

**Note:** upload attachment only caters for image & PDF.

3) Click on **Add Name** to confirm add.

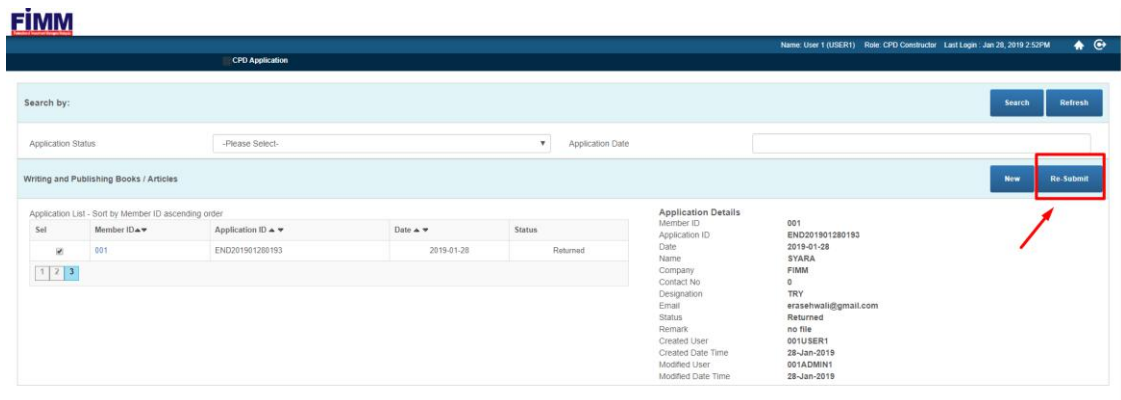
**Note:** Apply same process for writing articles

4) Click on **Save** to submit the application.

iii. Member can Re-Submit the returned application.

To Re-Submit the returned application:

1) Click on **Re-Submit** to re-submit application details as in figure 25



**Figure 25:** Re-Submit the returned application

2) Then, insert applicant information on writing books and click on **Choose File** to upload the attachment.

**Note:** upload attachment only caters for image & PDF, only 1 attachment per row.

3) Click on **Add Name** to confirm add.

**Note:** Apply same process for writing articles

4) Click on **Save** to submit the application.

### 5.6.3 Reading Approved Financial Literature

The purpose of this screen is to be used by member's representative to submit the financial literature made by consultant

To access this screen:

1) Go to CPD Application

2) Select Examination reset listing and member will be brought to the screen as in Figure 26.

Search by:

Company ID:  Application Date:

Application Status:

Reading Approved Financial Literature New Re-Submit

Application List - Sort by Member ID ascending order

Set	Member ID ▲▼	Application ID ▲▼	Date ▲▼	Status
<input type="checkbox"/>	001	READ201812060002	2018-12-25	Approved
<input type="checkbox"/>	001	READ201812060003	2018-12-06	Approved
<input type="checkbox"/>	001	READ201812060004	2018-12-06	Approved
<input type="checkbox"/>	001	READ201812060006	2018-12-24	Rejected
<input type="checkbox"/>	001	READ201812060007	2018-12-04	Approved
<input type="checkbox"/>	001	READ201812060008	2018-12-06	Approved
<input type="checkbox"/>	001	READ201812110012	2018-11-27	Approved
<input type="checkbox"/>	001	READ201812120019	2018-12-12	Approved
<input type="checkbox"/>	001	READ201812120020	2018-12-12	Returned
<input type="checkbox"/>	001	READ201812120030	2018-12-19	Approved

1 2

**Figure 26: Reading Approved Financial Literature Screen**

Throughout this screen:

- i) Member can create new application for reading approved financial literature made by Consultant.

To create new application:

- 1) Click on New to insert application details as in figure 27 and member will be redirecting to the screen as in figure 28.

Search by:

Company ID:  Application Date:

Application Status:

Reading Approved Financial Literature New Re-Submit

Application List - Sort by Member ID ascending order

Set	Member ID ▲▼	Application ID ▲▼	Date ▲▼	Status
<input type="checkbox"/>	001	READ201812060002	2018-12-25	Approved
<input type="checkbox"/>	001	READ201812060003	2018-12-06	Approved
<input type="checkbox"/>	001	READ201812060004	2018-12-06	Approved
<input type="checkbox"/>	001	READ201812060006	2018-12-24	Rejected
<input type="checkbox"/>	001	READ201812060007	2018-12-04	Approved
<input type="checkbox"/>	001	READ201812060008	2018-12-06	Approved
<input type="checkbox"/>	001	READ201812110012	2018-11-27	Approved
<input type="checkbox"/>	001	READ201812120019	2018-12-12	Approved
<input type="checkbox"/>	001	READ201812120020	2018-12-12	Returned
<input type="checkbox"/>	001	READ201812120030	2018-12-19	Approved

1 2

**Figure 27: Create new application for Reading Approved Financial Literature**

**FIMM**

CPD Application

Name: User 1 (USER1) Role: CPD Constructor Last Login: Jan 28, 2019 2:52PM

Application for Reading Financial Literature New

Member Code: 001 Application Code: READ201901280091

Name: Date: 28-Jan-2019

Company: FIMM Contact No.:

Designation: Email:

\* Indicate Compulsory Field

Reading Approved Financial Literatures (H CPD Points)

NRIC	Applicant Name	FIMM No.	Financial Literatures	Issue Date	Publisher	Date of Completion	Attachment
							Choose File No file chosen

Add Name

Applicant List - 0 record(s)

Save Reset Back

**Figure 28:** Screen Reading Approved Financial Literature New application form

- 2) Then, insert applicant information on Reading Approved Financial Literatures and click on **Choose File** to upload the attachment.

**Note:** upload attachment only caters for image & PDF

- 3) Click on **Add Name** to confirm add.
  - 4) Click on **Save** to submit the application.
- ii) Member can Re-Submit the returned application.

To Re-Submit the returned application:

- 1) Click on **Re-Submit** to re-submit application details
- 2) Then, insert applicant information and click on **Choose File** to upload the attachment.

**Note:** upload attachment only caters for image & PDF.

- 3) Click on **Add Name** to confirm add.
- 4) Click on **Save** to submit the application.

## 5.6.4 Teaching and Speaking

This is the screen to be used by member's representative to submit the teaching or speaking on programs approved by FIMM.

To access this screen:

1. Go to CPD Application
2. Select Teaching and Speaking and member will be brought into the screen as in Figure 29.

**FIMM**

CPD Application

Name: User 1 (USER1) Role: CPD Constructor Last Login: Jan 28, 2019 2:52PM

Search by:

Application Status: -Please Select- Application Date:

Teaching or Speaking on Program Approved by FIMM

New Re-Submit

Application List - Sort by Member ID ascending order

Set	Member ID ▲▼	Application ID ▲▼	Date ▲▼	Status
<input type="checkbox"/>	001	TEACH201812070001	2018-12-24	Approved
<input type="checkbox"/>	001	TEACH201812070002	2018-12-24	Rejected
<input type="checkbox"/>	001	TEACH201812120009	2018-12-12	Approved
<input type="checkbox"/>	001	TEACH201812120012	2018-12-12	Returned
<input type="checkbox"/>	001	TEACH201812120013	2018-12-12	Approved
<input type="checkbox"/>	001	TEACH201812121013	2018-12-12	Rejected
<input type="checkbox"/>	001	TEACH201812270039	2018-12-27	Approved
<input type="checkbox"/>	001	TEACH201812270041	2018-12-27	Approved
<input type="checkbox"/>	001	TEACH201812270042	2018-12-27	Approved
<input type="checkbox"/>	001	TEACH201812270043	2018-12-27	Approved

1 2

**Figure 29: Teaching and Speaking Screen**

Throughout the screen:

i) Member can create an application for teaching and speaking program approved by FIMM.

To create the new application:

1) Click on **New** to insert application details as in Figure 30 and user will be brought to the screen as in Figure 31.

**FIMM**

CPD Application

Name: cpduser cpd (CPD/USER) Role: CPD Constructor Last Login: Jan 30, 2019 11:41AM

Search by:

Application Status: -Please Select- Application Date:

Teaching or Speaking on Program Approved by FIMM

New Re-Submit

Application List - Sort by Member ID ascending order

Set	Member ID ▲▼	Application ID ▲▼	Date ▲▼	Status
<input type="checkbox"/>	009	TEACH201812120010	2018-11-27	Returned
<input type="checkbox"/>	009	TEACH201812270040	2018-12-27	Approved

**Figure 30: Button to create new application for Teaching and Speaking Screen**

Application for Teaching or Speaking New

Member Code: 009 Application Code: TEACH201901300053

Name: Date: 30-Jan-2019

Company: PMB Contact No:

Designation: Email:

\* Indicate Compulsory Field

Teaching or Speaking on Program Approved by FIMM (8 CPD Points)

NRIC	Applicant Name	FIMM No	Presentation Title	Event Title	Event Date	Presentation Hour	Event Organizer	Attachment	Attachmend
								Choose File No fl..osen	Choose File

Add Name

Applicant List - 0 record(s)

Save Reset Back

**Figure 31:** Create new application for Teaching and Speaking Screen

- 2) Then, insert applicant information on Teaching/Speaking and click on **Choose File** to upload the attachment.
- 3) Click on **Add Name** to confirm add.
- 4) Click on **Save** to submit the application.

ii) Member can Re-Submit the returned application.

To Re-Submit the returned application:

- 1) Click on **Re-Submit** to re-submit application details and user will be brought to the screen as in Figure 32 and user will be brought as in Figure 33.

Search by:

Search Refresh

Application Status: -Please Select- Application Date:

Teaching or Speaking on Program Approved by FIMM

New Re-Submit

Application List - Sort by Member ID ascending order

Sel	Member ID	Application ID	Date	Status
<input type="checkbox"/>	009	TEACH201812120010	2018-11-27	Returned
<input type="checkbox"/>	009	TEACH201812270040	2018-12-27	Approved

**Figure 32:** Resubmit button of teaching and speaking

**FIMM**  
CPD Application

Name: cpduser cpd (CPDUSER) Role: CPD Constructor Last Login: Jan 30, 2019 11:41AM

Application for Teaching or Speaking - Edit

Member Code: 009 Application Code: TEACH201812120010  
 Name: fe Date: 30-Jan-2019  
 Company: PUBS Contact No: 2313213  
 Designation: SRA Email: email@email.com

\* Indicate Compulsory Field

Teaching or Speaking on Program Approved by FIMM (8 CPD Points)

NRIC	Applicant Name	FIMM No	Presentation Title	Event Title	Event Date	Presentation Hour	Event Organizer	Attachment	Attachment2
								Choose File	No file chosen

**Add Name**

Applicant List - 1 record(s)

Update	Applicant Name	NRIC	FIMM No	Presentation Title	Event Title	Event Date	Presentation Hour	Event Organizer	Attachment	Attachment 2	CPD Points
<a href="#">Edit</a>	s	940712123123	31	abc	abc	01-Dec-2018		ef	<a href="#">View</a>	<a href="#">View</a>	8

**Figure 33:** Edit application for Teaching and Speaking Screen for re-submit

- Then, insert applicant information and click on **Choose File** to upload the attachment.

**Note:** upload attachment only caters for image & PDF.

- Click on **Add Name** to confirm add.
- Click on **Save** to submit the application

### 5.6.5 Academic/Professional Qualifications

This screen is used by member's representative to submit the academic or professional qualification of consultant.

To access this screen:

- Go to CPD Application
- Select Academic/Professional Qualifications and member will be brought into the screen as in Figure 34.

**FIMM**  
CPD Application

Name: cpduser cpd (CPDUSER) Role: CPD Constructor Last Login: Jan 30, 2019 11:41AM

Search by:

Application Status: -Please Select- Application Date:

Obtaining Academic or Professional Qualifications

**New** **Re-Submit**

Application List - Sort by Member ID ascending order

Set	Member ID	Application ID	Date	Status
<input type="checkbox"/>	009	QUA201812130012	2018-12-13	Rejected
<input type="checkbox"/>	009	QUA201812130015	2018-12-13	Returned
<input type="checkbox"/>	009	QUA201812200055	2018-12-20	Approved

**Figure 34:** Academic/Professional Qualification Screen

Throughout the screen:

- i) Member can create an application for Academic/Professional qualification of the consultant.

To create the new application:

- 1) Click on **New** to insert application details as in Figure 35 and user will be brought to the screen as in Figure 36.

The screenshot shows the FIMM CPD Application interface. At the top, there's a header with the FIMM logo and user information: Name: cpduser cpd (CPDUSER), Role: CPD Constructor, Last Login: Jan 30, 2019 11:41AM. Below the header, there's a search bar with 'Search by:' and buttons for 'Search' and 'Refresh'. A dropdown menu for 'Application Status' is set to '-Please Select-'. Below this, there's a section titled 'Teaching or Speaking on Program Approved by FIMM'. On the right side of this section, there are two buttons: 'New' and 'Re-Submit'. The 'New' button is highlighted with a red box, and a red arrow points to it. Below this section, there's a table titled 'Application List - Sort by Member ID ascending order'.

Sl	Member ID ▲▼	Application ID ▲▼	Date ▲▼	Status
1	009	TEACH201812120010	2018-11-27	Returned
2	009	TEACH201812270040	2018-12-27	Approved

**Figure 35:** Button to create new application for Teaching and Speaking Screen

The screenshot shows the FIMM CPD Application interface for creating a new application. The header is the same as in Figure 35. Below the search bar, there's a section titled 'Application for Teaching or Speaking - New'. It contains several input fields: Member Code (009), Name, Company (PMB), Designation, Application Code (TEACH201901300053), Date (30-Jan-2019), Contact No, and Email. A red asterisk indicates compulsory fields. Below these fields, there's a table titled 'Teaching or Speaking on Program Approved by FIMM (8 CPD Points)'.

NRIC	Applicant Name	FIMM No	Presentation Title	Event Title	Event Date	Presentation Hour	Event Organizer	Attachment	Attachment2
								Choose File   No file chosen	Choose File

Below the table, there's a green 'Add Name' button and a text 'Applicant List - 0 record(s)'. At the bottom right, there are buttons for 'Save', 'Reset', and 'Back'.

**Figure 36:** Create new application for Teaching and Speaking Screen

- 2) Then, insert applicant information on Teaching/Speaking and click on **Choose File** to upload the attachment.
- 3) Click on **Add Name** to confirm add.
- 4) Click on **Save** to submit the application.

- ii) Member can Re-Submit the returned application.

To Re-Submit the returned application:

- 1) Click on **Re-Submit** to re-submit application details and user will be brought to the

screen as in Figure 37 and user will be brought as in Figure 38.

The screenshot shows the FIMM CPD Application interface. At the top, there's a header with the FIMM logo and user information. Below it, a search bar is present. The main section is titled 'Teaching or Speaking on Program Approved by FIMM'. It contains a table with columns: Sel, Member ID, Application ID, Date, and Status. The table has two rows of data. To the right of the table, there are buttons for 'New', 'Re-Submit', and 'Re-Submit' (with a red box and arrow pointing to it).

Sel	Member ID	Application ID	Date	Status
<input type="checkbox"/>	009	TEACH201812120010	2018-11-27	Returned
<input type="checkbox"/>	009	TEACH201812270040	2018-12-27	Approved

**Figure 37:** Resubmit button of teaching and speaking

The screenshot shows the 'Application for Teaching or Speaking Edit' form. It has two columns of input fields. The left column contains: Member Code (009), Name (te), Company (FIMS), and Designation (sara). The right column contains: Application Code (TEACH201812120010), Date (30-Jan-2019), Contact No (2313213), and Email (email@email.com). Below these fields is a table for 'Teaching or Speaking on Program Approved by FIMM (8 CPD Points)'. The table has columns: NRIC, Applicant Name, FIMM No, Presentation Title, Event Title, Event Date, Presentation Hour, Event Organizer, Attachment, and Attachment2. There are 'Choose File' buttons for the Attachment and Attachment2 columns. At the bottom, there is an 'Add Name' button and a table with columns: Update, Applicant Name, NRIC, FIMM No, Presentation Title, Event Title, Event Date, Presentation Hour, Event Organizer, Attachment, Attachment2, and C. D. P. e. D. i. P. e. i. e. n. R. t. o. e.

**Figure 38:** Edit application for Teaching and Speaking Screen for re-submit

- 2) Then, insert applicant information and click on **Choose File** to upload the attachment.

**Note:** upload attachment only caters for image & PDF.

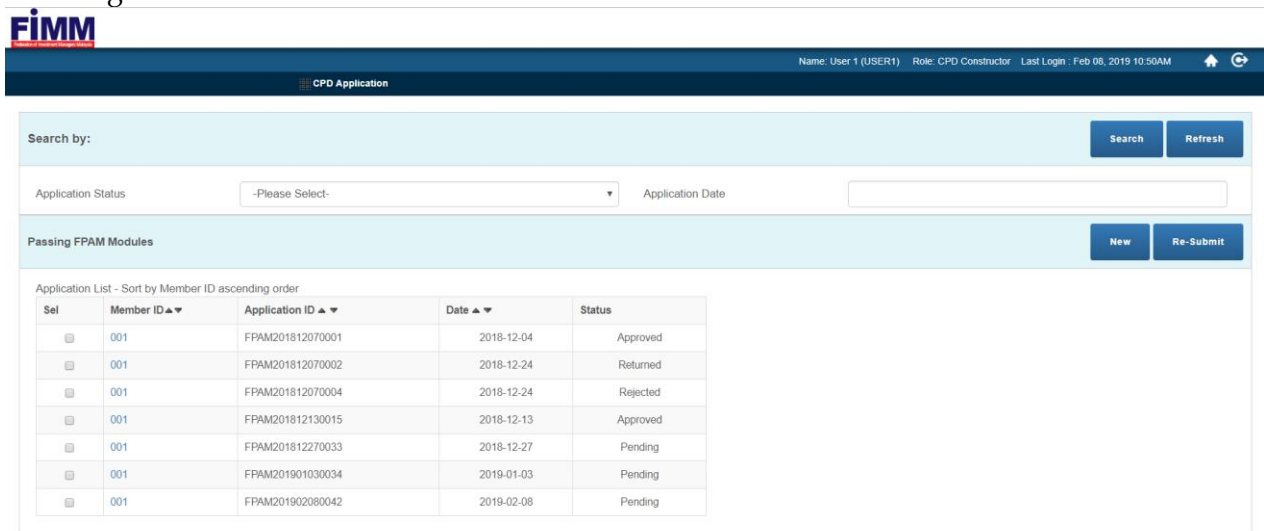
- 3) Click on **Add Name** to confirm add.
- 4) Click on **Save** to submit the application

## 5.6.6 Passing FPAM Modules

This is the screen to be used by member's representative to submit the consultant list that already passing the FPAM modules.

To access this screen:

- 1) Go to CPD Application
- 2) Select Passing FPAM Modules and member will be brought into the screen as in Figure 39.



**FIMM** CPD Application

Name: User 1 (USER1) Role: CPD Constructor Last Login: Feb 08, 2019 10:50AM

Search by:

Application Status: -Please Select- Application Date:

Passing FPAM Modules New Re-Submit

Application List - Sort by Member ID ascending order

Sel	Member ID ▲▼	Application ID ▲▼	Date ▲▼	Status
<input type="checkbox"/>	001	FPAM201812070001	2018-12-04	Approved
<input type="checkbox"/>	001	FPAM201812070002	2018-12-24	Returned
<input type="checkbox"/>	001	FPAM201812070004	2018-12-24	Rejected
<input type="checkbox"/>	001	FPAM201812130015	2018-12-13	Approved
<input type="checkbox"/>	001	FPAM201812270033	2018-12-27	Pending
<input type="checkbox"/>	001	FPAM201901030034	2019-01-03	Pending
<input type="checkbox"/>	001	FPAM201902080042	2019-02-08	Pending

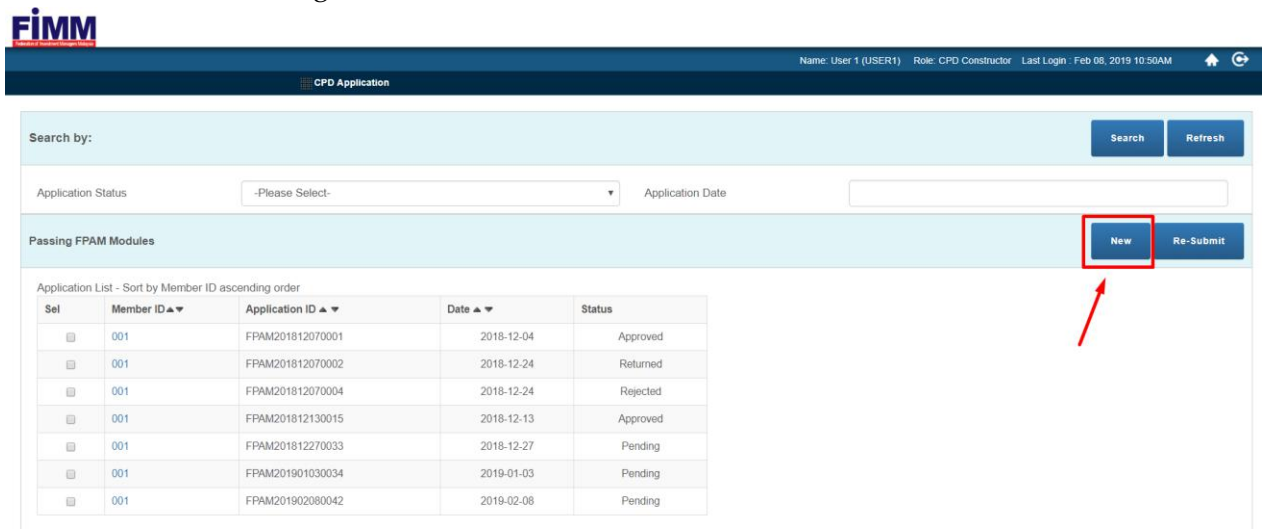
**Figure 39: Passing FPAM Modules Screen**

Throughout the screen:

- i) Member can create an application for Passing FPAM Modules Screen of the consultant.

To create the new application:

- 1) Click on New to insert application details as in Figure 40 and user will be brought to the screen as in Figure 41.



**FIMM** CPD Application

Name: User 1 (USER1) Role: CPD Constructor Last Login: Feb 08, 2019 10:50AM

Search by:

Application Status: -Please Select- Application Date:

Passing FPAM Modules New Re-Submit

Application List - Sort by Member ID ascending order

Sel	Member ID ▲▼	Application ID ▲▼	Date ▲▼	Status
<input type="checkbox"/>	001	FPAM201812070001	2018-12-04	Approved
<input type="checkbox"/>	001	FPAM201812070002	2018-12-24	Returned
<input type="checkbox"/>	001	FPAM201812070004	2018-12-24	Rejected
<input type="checkbox"/>	001	FPAM201812130015	2018-12-13	Approved
<input type="checkbox"/>	001	FPAM201812270033	2018-12-27	Pending
<input type="checkbox"/>	001	FPAM201901030034	2019-01-03	Pending
<input type="checkbox"/>	001	FPAM201902080042	2019-02-08	Pending

**Figure 40: Create New Passing FPAM Modules Screen**

Application for Passing FPAM Modules New

Member Code: 001 Application Code: FPAM201902080043

Name: Date: 08-Feb-2019

Company: FIMM Contact No:

Designation: Email:

\* Indicate Compulsory Field

Passing FPAM Modules (10 CPD Points) CFP Module 1, 3 & 4 / IFP Module 1 & 3

NRIC	Applicant Name	FIMM No	Modules	Date of Completion	Attachment
			Certified Financial Modules 1, 3 & 4		Choose File No file chosen

Add Name

Applicant List - 0 record(s)

Passing FPAM Modules (5 CPD Points) CFP Module 2 / IFP Module 2 & 4

NRIC	Applicant Name	FIMM No	Modules	Date of Completion	Attachment
			Certified Financial Module 2		Choose File No file chosen

Add Name

Applicant List - 0

Save Reset Back

**Figure 41:** New Application Passing FPAM Modules Screen

- 2) Then, insert applicant information and click on **Choose File** to upload the attachment.

**Note:** *upload attachment only caters for image & PDF.*

- 3) Click on **Add Name** to confirm add.
  - 4) Click on **Save** to submit the application
- ii) Member can Re-Submit the returned application.

To Re-Submit the returned application:

- 1) Click on **Re-Submit** to re-submit application details and user will be brought to the screen as in Figure 42 and user will be brought as in Figure 43.

The screenshot shows the FIMM CPD Application interface. At the top, there's a header with the FIMM logo and user information: Name: User 1 (USER1), Role: CPD Constructor, Last Login: Feb 08, 2019 10:50AM. Below the header, there's a search bar with 'Search by:' and buttons for 'Search' and 'Refresh'. The main section is titled 'Passing FPAM Modules' and contains a table of application lists. A red box highlights the 'Re-Submit' button, with a red arrow pointing to it.

Sel	Member ID ▲▼	Application ID ▲▼	Date ▲▼	Status
<input type="checkbox"/>	001	FPAM201812070001	2018-12-04	Approved
<input type="checkbox"/>	001	FPAM201812070002	2018-12-24	Returned
<input type="checkbox"/>	001	FPAM201812070004	2018-12-24	Rejected
<input type="checkbox"/>	001	FPAM201812130015	2018-12-13	Approved
<input type="checkbox"/>	001	FPAM201812270033	2018-12-27	Pending
<input type="checkbox"/>	001	FPAM201901030034	2019-01-03	Pending
<input type="checkbox"/>	001	FPAM201902080042	2019-02-08	Pending

**Figure 42:** Resubmit button of Passing FPAM Modules

The screenshot shows the 'Application for Passing FPAM Modules Edit' screen. It contains a form with fields for Member Code, Name, Company, Designation, Application Code, Date, Contact No, and Email. Below the form, there's a section for 'Passing FPAM Modules (10 CPD Points) CFP Module 1, 3 & 4 / IFP Module 1 & 3'. This section includes a table with columns for NRIC, Applicant Name, FIMM No, Modules, Date of Completion, Attachment, and CPD Point. There's an 'Add Name' button and an 'Applicant List - 1 record(s)' section. Below this, there's another section for 'Passing FPAM Modules (5 CPD Points) CFP Module 2 / IFP Module 2 & 4' with a similar table and 'Add Name' button.

NRIC	Applicant Name	FIMM No	Modules	Date of Completion	Attachment	CPD Point	Delete Row
	NAZRUL	590519135431	Module1	31-Dec-2018	<a href="#">View</a>		<a href="#">Delete</a>

**Figure 43:** Edit application for Passing FPAM Modules Screen for re-submit

2) Then, insert applicant information and click on **Choose File** to upload the attachment.

**Note:** upload attachment only caters for image & PDF.

3) Click on **Add Name** to confirm add.

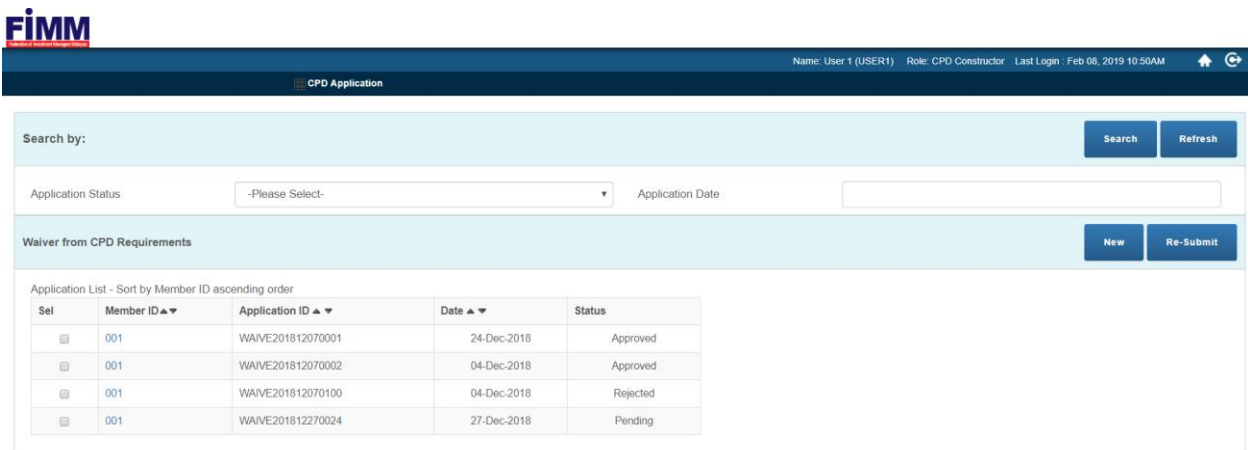
4) Click on **Save** to submit the application

## 5.6.7 Waiver from CPD Requirement

This is the screen to be used by member's representative to submit the consultant that waiver from CPD requirement due to medical reason

To access this screen:

- 1) Go to CPD Application
- 2) Select Waiver from CPD Requirement and member will be brought into the screen as in Figure 44.



The screenshot shows the FIMM CPD Application interface. At the top, there's a header with the FIMM logo and user information: Name: User 1 (USER1), Role: CPD Constructor, Last Login: Feb 08, 2019 10:50AM. Below the header, there's a search bar with 'Search by:' and buttons for 'Search' and 'Refresh'. The main section is titled 'Waiver from CPD Requirements' and includes a 'New' button and a 'Re-Submit' button. Below this, there's a table titled 'Application List - Sort by Member ID ascending order' with columns: Sel, Member ID, Application ID, Date, and Status. The table contains four rows of application data.

Sel	Member ID	Application ID	Date	Status
<input type="checkbox"/>	001	WAIVE201812070001	24-Dec-2018	Approved
<input type="checkbox"/>	001	WAIVE201812070002	04-Dec-2018	Approved
<input type="checkbox"/>	001	WAIVE201812070100	04-Dec-2018	Rejected
<input type="checkbox"/>	001	WAIVE201812270024	27-Dec-2018	Pending

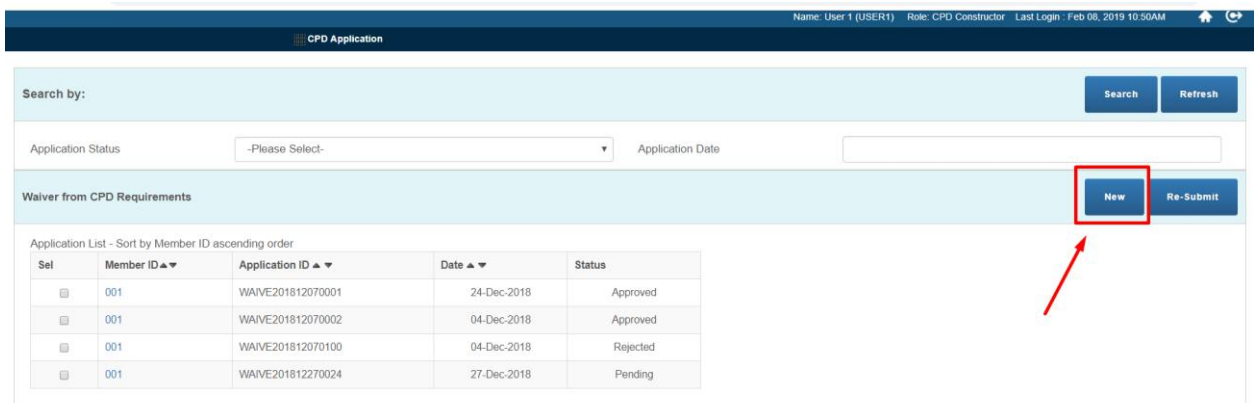
**Figure 44:** Waiver from CPD Requirement screen

Throughout the screen:

- i) Member can create an application for Passing FPAM Modules Screen of the consultant.

To create the new application:

- 1) Click on **New** to insert application details as in Figure 45 and user will be brought to the screen as in Figure 46.



This screenshot is identical to Figure 44, but with a red box highlighting the 'New' button in the 'Waiver from CPD Requirements' section. A red arrow points from the bottom right towards the 'New' button.

**Figure 45:** Button Create New Waiver from CPD Requirement Screen

The screenshot shows the FIMM CPD Application interface. At the top, the FIMM logo is on the left, and user information (Name: User 1 (USER1), Role: CPD Constructor, Last Login: Feb 06, 2019 10:50AM) is on the right. Below this is a header bar labeled "CPD Application". The main content area is titled "Application for Waiver from CPD Requirements New". It contains two columns of input fields. The left column includes Member Code (001), Name, Company (FIMM), and Designation. The right column includes Application Code (WAIVE201902080030), Date (08-Feb-2019), Contact No, and Email. A red asterisk indicates compulsory fields. Below these fields is a table for "Waiver from CPD Requirements (16 CPD Points)". The table has columns for NRIC, Applicant Name, FIMM No, Reason, and Attachment. One row is visible with Reason "Stroke - resulting in permanent neurological de" and Attachment "Choose File" (No file chosen). An "Add Name" button is below the table. At the bottom right are "Save", "Reset", and "Back" buttons.

**Figure 46:** New Application for Waiver from CPD Requirement

- 2) Then, insert applicant information and click on **Choose File** to upload the attachment.

**Note:** *upload attachment only caters for image & PDF.*

- 3) Click on **Add Name** to confirm add.
- 4) Click on **Save** to submit the application

ii) Member can Re-Submit the returned application.

To Re-Submit the returned application:

- 1) Click on **Re-Submit** to re-submit application details and user will be brought to the screen as in Figure 47 and user will be brought as in Figure 48.

The screenshot shows the FIMM CPD Application interface. At the top, there's a header with the FIMM logo and user information: 'Name: User 1 (USER1) Role: CPD Constructor Last Login: Feb 08, 2019 10:50AM'. Below the header, there's a search bar with 'Search' and 'Refresh' buttons. The main section is titled 'Passing FPAM Modules' and contains a table of application records. A red box highlights the 'Re-Submit' button, with a red arrow pointing to it.

Sel	Member ID ▲▼	Application ID ▲▼	Date ▲▼	Status
<input type="checkbox"/>	001	FPAM201812070001	2018-12-04	Approved
<input type="checkbox"/>	001	FPAM201812070002	2018-12-24	Returned
<input type="checkbox"/>	001	FPAM201812070004	2018-12-24	Rejected
<input type="checkbox"/>	001	FPAM201812130015	2018-12-13	Approved
<input type="checkbox"/>	001	FPAM201812270033	2018-12-27	Pending
<input type="checkbox"/>	001	FPAM201901030034	2019-01-03	Pending
<input type="checkbox"/>	001	FPAM201902080042	2019-02-08	Pending

**Figure 47:** Resubmit button of Waiver from CPD Requirement

The screenshot shows the 'Application for Passing FPAM Modules Edit' screen. It contains a form with fields for Member Code, Name, Company, Designation, Application Code, Date, Contact No, and Email. Below the form, there are sections for 'Passing FPAM Modules (10 CPD Points) CFP Module 1, 3 & 4 / IFP Module 1 & 3' and 'Passing FPAM Modules (5 CPD Points) CFP Module 2 / IFP Module 2 & 4'. Each section has a table with columns for NRIC, Applicant Name, FIMM No, Modules, Date of Completion, Attachment, and CPD Point. The 'Attachment' column has a 'Choose File' button. At the bottom, there's a 'Remark' field and 'Save', 'Reset', and 'Back' buttons.

**Figure 48:** Edit application for Waiver from CPD Requirement Screen for re-submit

2) Then, insert applicant information and click on **Choose File** to upload the attachment.

**Note:** upload attachment only caters for image & PDF.

3) Click on **Add Name** to confirm add.

4) Click on **Save** to submit the application

## 5.6.8 CPD Participant Query

This is the screen to be used by member's representative to view the CPD Candidates and their history of log.

To access this screen:

- 1) Go to CPD Application
- 2) Select CPD Participant Query and member will be brought into the screen as in Figure 49.



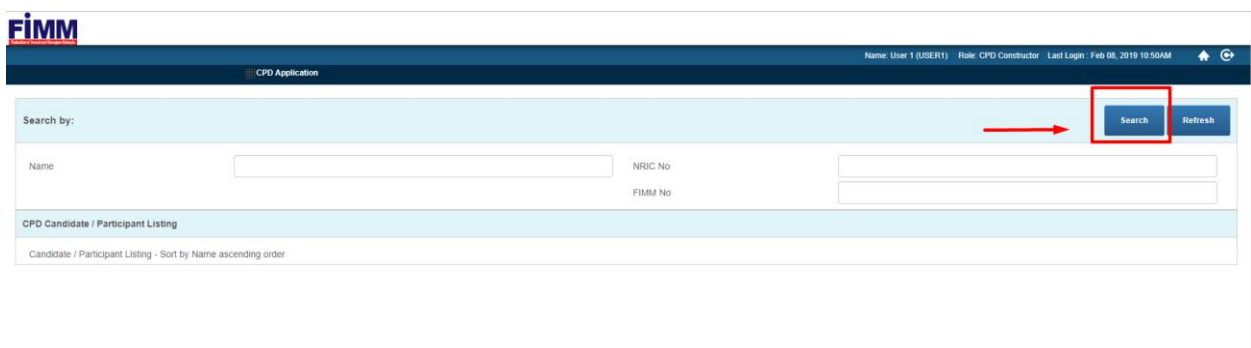
**Figure 49:** CPD Participant Query screen

Throughout the screen:

- i) Member can search the CPD Participant.

To search the CPD Participant:

- 1) Click on **Search** to search the CPD Participant application as in Figure 50 and user will be brought to the screen as in Figure 51.



**Figure 50:** search button for CPD Participant Query screen

Search by:

Name  NRIC No  FIMM No

CPD Candidate / Participant Listing

Candidate / Participant Listing - Sort by Name ascending order

Sel	Member ID	Name ▲ ▼	NRIC No ▲ ▼	FIMM_NO ▲ ▼	CPD Point
<input type="checkbox"/>	001	ABDUL RAHIM BIN NIK MAZIAN	900715036087	0090116441	15
<input type="checkbox"/>	001	Amirah	8888	8888	4
<input type="checkbox"/>	001	Amran Fakri	870324065767	031030445	15
<input type="checkbox"/>	001	AZNIDA FARAHAIN BINTI AZRI	911207036164	009-S-21569	40
<input type="checkbox"/>	001	Black	44444	44444	4
<input type="checkbox"/>	001	Blax	44444	4444	12
<input type="checkbox"/>	001	CHUA KO ONN	741212085930	001567324	4
<input type="checkbox"/>	001	CHUA KO ONN	590519135431	123123	15
<input type="checkbox"/>	001	CHUA KO ONN	590519135431	54720410	32
<input type="checkbox"/>	001	DAVID JAMES	930304043143	321321	398
<input type="checkbox"/>	001	Ily	880311035074	031025343	40
<input type="checkbox"/>	001	IZMA MAZLINA BT MOHAMAD	791118055036	009-0-129146	2

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**Figure 51:** Search result listing of CPD Participant Query

2) Tick on ☐ to view the History Log of the CPD Candidates as in Figure 52

Search by:

Date From  Date To  Application Form  DATE

History Log

History Log - Sort by Log Date descending order

Log Date ▲ ▼	Log Time	CPD Point	CPD Point Before	Added CPD Point	Document ID	Approved By	Approved Date
2018-12-27	11:26:02	4	0	4	END201812270175	001FIMMAPP1	12/27/2018 11:26:02 AM
2018-12-27	11:27:07	2	0	2	TEACH201812270043	001FIMMAPP1	12/27/2018 11:27:07 AM

**Figure 52:** History Log of CPD Candidates

## 5.6.9 CPD Participant Upload

This is the screen to be used by member's representative to upload form of CPD Participant. To access this screen:

- 1) Go to CPD Application
- 2) Select CPD Participant Upload and member will be brought into the screen as in Figure 53.

Search by:

CPD Title

CPD Date

CPD Participant Upload

Please Select CPD Program - Sort by CPD Title ascending order

Sel	Member ID	CPD Code	Training Title ▲ ▼
<input type="checkbox"/>	001	CPD201812110018	AMLA
<input type="checkbox"/>	001	CPD201812110023	BASIC OF UNIT TRUST FUND - MORE THAN 30 DAYS
<input type="checkbox"/>	001	CPD201812260143	CPD PROG - NIZAM TEST #1
<input type="checkbox"/>	001	CPD201812060007	Event Ad-Hoc
<input type="checkbox"/>	001	CPD201812060008	Pholygamy - Between Principals & Ethics
<input type="checkbox"/>	001	CPD201812060004	Repeated Test - What and Where to Invest in 2018
<input type="checkbox"/>	001	CPD201812060002	Seminar Test
<input type="checkbox"/>	001	CPD201812270170	TEST CPD PROG NIZAM - MORE 30 DAYS FOR APPROVAL WITH SPEAKER BIODATA
<input type="checkbox"/>	001	CPD201812270165	TEST CPD PROG NIZAM - MORE THAN 30 DAYS FOR APPROVAL
<input type="checkbox"/>	001	CPD201812120031	TEST DATA - PREVIOUS DATE

1 2

**Figure 53:** CPD Participant Upload screen

Throughout the screen:

i) Member can upload form of the CPD Participant.

To upload the CPD Participant form:

- 1) Tick on check box 1 to select the CPD Program and the CPD Date of the programs are listed. Tick on check box 2 and member will be see the CPD Participant Upload Form as in Figure 54.

CPD Participant Upload

Please Select CPD Program - Sort by CPD Title descending order

Sel	Member ID	CPD Code	Training Title ▲ ▼
<input type="checkbox"/>	001	CPD201812060003	What and Where to Invest in 2018
<input type="checkbox"/>	001	CPD201812260156	UNIT TRUST - ADVANCED
<input type="checkbox"/>	001	CPD201812110027	TESTING NEW CPD PROGRAM TITLE FOR MORE THAN 30 DAY
<input checked="" type="checkbox"/>	001	CPD201812120031	TEST DATA - PREVIOUS DATE
<input type="checkbox"/>	001	CPD201812270165	TEST CPD PROG NIZAM - MORE THAN 30 DAYS FOR APPROVAL
<input type="checkbox"/>	001	CPD201812270170	TEST CPD PROG NIZAM - MORE 30 DAYS FOR APPROVAL WITH SPEAKER BIODATA
<input type="checkbox"/>	001	CPD201812060002	Seminar Test
<input type="checkbox"/>	001	CPD201812060004	Repeated Test - What and Where to Invest in 2018
<input type="checkbox"/>	001	CPD201812060008	Pholygamy - Between Principals & Ethics
<input type="checkbox"/>	001	CPD201812060007	Event Ad-Hoc

1 2

CPD PARTICIPANT UPLOAD FORM

Select Upload File

Choose File No file chosen

[Click here to download PARTICIPANT UPLOAD FILE Template \(.xlsx format\)](#)

Upload

**Figure 54:** To view the CPD Participation Upload Form.

- 2) Then, insert applicant information and click on **Choose File** to upload the attachment.

**Note:** *upload attachment only caters for image & PDF*

- 3) Click **Upload** . To download the file template of CPD Participation Form, click [Click here to download PARTICIPANT UPLOAD FILE Template \(.xlsx format\)](#) and member will be redirecting to the file template.

## 5.7.0 CPD Feedback

This is the screen to be used by member's representative to upload a program training report and evaluation for course that has been conducted.

To access this screen:

- 1) Go to CPD Application
- 2) Select CPD Feedback and member will be brought into the screen as in Figure 54.

Sel	Comp. Code	CPD Code	Training Title
<input type="checkbox"/>	001	CPD201812060003	What and Where to Invest in 2018
<input type="checkbox"/>	001	CPD201812060156	UNIT TRUST - ADVANCED
<input type="checkbox"/>	001	CPD201812110027	TESTING NEW CPD PROGRAM TITLE FOR MORE THAN 30 DAY
<input type="checkbox"/>	001	CPD201812120031	TEST DATA - PREVIOUS DATE
<input type="checkbox"/>	001	CPD201812270165	TEST CPD PROG NIZAM - MORE THAN 30 DAYS FOR APPROVAL
<input type="checkbox"/>	001	CPD201812270170	TEST CPD PROG NIZAM - MORE 30 DAYS FOR APPROVAL WITH SPEAKER BIO DATA
<input type="checkbox"/>	001	CPD201812060002	Seminar Test
<input type="checkbox"/>	001	CPD201812060004	Repeated Test - What and Where to Invest in 2018
<input type="checkbox"/>	001	CPD201812060006	Pholygamy - Between Principals & Ethics
<input type="checkbox"/>	001	CPD201812060007	Event Ad-Hoc

**Figure 55:** CPD Feedback screen

Throughout the screen:

- i) Member can add CPD feedback.

To add CPD feedback:

- 1) Tick on ☐ to view the CPD Program details as in Figure 56.
- 2) Click on **Add New** to insert the feedback and user will be brought to the screen as in Figure 57

CPD Application

Name: User 1 (USER1) Role: CPD Constructor Last Login: Feb 06, 2019 2:03PM

Search by:

CPD Title CPD Date

CPD Feedback

Add New Edit

CPD Program List - Sort by CPD Title descending order

Select	Comp. Code	CPD Code	Training Title
<input type="checkbox"/>	001	CPD201812060003	What and Where to Invest in 2018
<input checked="" type="checkbox"/>	001	CPD201812260156	UNIT TRUST - ADVANCED
<input type="checkbox"/>	001	CPD201812110027	TESTING NEW CPD PROGRAM TITLE FOR MORE THAN 30 DAY
<input type="checkbox"/>	001	CPD201812120031	TEST DATA - PREVIOUS DATE
<input type="checkbox"/>	001	CPD201812270165	TEST CPD PROG NIZAM - MORE THAN 30 DAYS FOR APPROVAL
<input type="checkbox"/>	001	CPD201812270170	TEST CPD PROG NIZAM - MORE 30 DAYS FOR APPROVAL WITH SPEAKER BIODATA
<input type="checkbox"/>	001	CPD201812060002	Seminar Test
<input type="checkbox"/>	001	CPD201812060004	Repeated Test - What and Where to Invest in 2018
<input type="checkbox"/>	001	CPD201812060008	Polygamy - Between Principals & Ethics
<input type="checkbox"/>	001	CPD201812060007	Event Ad-Hoc

CPD Date List - Sort by Training Date ascending order

Select	Training Date	Status
<input checked="" type="checkbox"/>	2019-01-02	Not Submitted

CPD FEEDBACK FORM

**Figure 56:** Steps to add new feedback form of the created CPD Program

CPD Application

Name: User 1 (USER1) Role: CPD Constructor Last Login: Feb 06, 2019 2:03PM

CPD FEEDBACK FORM New

Member Code: 001 CPD Code (System Generate): CPD201812260156

Training Title: UNIT TRUST - ADVANCED Proposed Dates: 2019-01-02

Venue: Trainer:

Please provide the average rating for the following.  
Note: 1 – Poor; 2 – Fair; 3 – Moderate; 4 – Good; and 5 – Excellent.

**A. CONTENT/ TOPIC**

1. Meeting objective	0.0
2. Relevancy	0.0
3. Coverage of contents/topic	0.0

**B. SPEAKER / TRAINER**

1. Knowledgeable and skill	0.0
2. Systematic and well-organised	0.0
3. Quality of presentation materials/handouts	0.0

**Figure 57:** Feedback Form screen

3) Key-in all the information required and click on **Save** to submit the application.

*Note: Only program which the status is not submitted is able to add new feedback.*

ii) Member can edit CPD feedback.

To edit CPD feedback:

1) Tick on ☐ to view the CPD Program details as in Figure 58.

**CPD Feedback**

CPD Program List - Sort by CPD Title descending order

Sel	Comp. Code	CPD Code	Training Title
<input checked="" type="checkbox"/>	001	CPD201812060003	What and Where to Invest in 2018
<input type="checkbox"/>	001	CPD201812260156	UNIT TRUST - ADVANCED
<input type="checkbox"/>	001	CPD201812119027	TESTING NEW CPD PROGRAM TITLE FOR MORE THAN 30 DAY
<input type="checkbox"/>	001	CPD201812120031	TEST DATA - PREVIOUS DATE
<input type="checkbox"/>	001	CPD201812270165	TEST CPD PROG NIZAM - MORE THAN 30 DAYS FOR APPROVAL
<input type="checkbox"/>	001	CPD201812270170	TEST CPD PROG NIZAM - MORE THAN 30 DAYS FOR APPROVAL WITH SPEAKER BIODATA
<input type="checkbox"/>	001	CPD201812060002	Seminar Test
<input type="checkbox"/>	001	CPD201812060004	Repeated Test - What and Where to Invest in 2018
<input type="checkbox"/>	001	CPD201812060008	Pholygamy - Between Principals & Ethics
<input type="checkbox"/>	001	CPD201812060007	Event Ad-Hoc

CPD Date List - Sort by Training Date ascending order

Sel	Training Date	Status
<input type="checkbox"/>	2018-12-21	Approved
<input type="checkbox"/>	2018-12-25	Rejected
<input type="checkbox"/>	2019-01-05	Approved
<input type="checkbox"/>	2019-02-04	Approved
<input checked="" type="checkbox"/>	2019-03-05	Returned
<input type="checkbox"/>	2020-12-21	Pending

**CPD FEEDBACK FORM**

Member Code: 001 CPD Code (System Generate): CPD201812060003

Training Title: WHAT AND WHERE TO INVEST IN 2018 Proposed Dates: 2019-03-05

Venue: Trainer:

**Figure 58:** Steps to edit feedback form of the created CPD Program

- 2) Click on **Edit** to edit and do amendment.
- 3) Click on **Save** to submit the application.

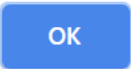
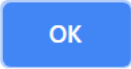


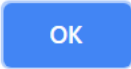
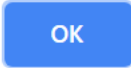
## 6 APPENDIX

### 6.1 POPUP MESSAGE

This part explains about the popup message function on this CPD application.

POPUP MESSAGE	DESCRIPTIONS
<p>i3train.fimm.com.my says</p> <p>Sorry, user is not authorized to use system!</p> <p><b>OK</b></p>	<ul style="list-style-type: none"> <li>• Popup message to notify that the user is not authorized to use the system</li> </ul>




<p>i3train.fimm.com.my says</p> <p>Invalid Password(12b)</p> <p>OK</p>	<ul style="list-style-type: none"> <li>• Popup message to notify the password entered by user is not correct</li> </ul>
<p>i3train.fimm.com.my says</p> <p>Please Tick At Least one Checkbox..!</p> <p>OK</p>	<ul style="list-style-type: none"> <li>• Popup message to notify the user to tick at least one checkbox to continue using the system</li> </ul>
<p>i3train.fimm.com.my says</p> <p>The CPD Program has been Approved..</p> <p>OK</p>	<ul style="list-style-type: none"> <li>• Popup message to notify the user CPD Program has been Approved</li> </ul>
<p>i3train.fimm.com.my says</p> <p>The CPD Program has been Rejected..</p> <p>OK</p>	<ul style="list-style-type: none"> <li>• Popup message to notify the user CPD Program has been rejected.</li> </ul>

i3train.fimm.com.my says No approved Training Program found.. 	<ul style="list-style-type: none"> <li>• Popup message to notify the user that there is no approved training program found</li> </ul>
i3train.fimm.com.my says Please insert Name.. 	<ul style="list-style-type: none"> <li>• Popup message to notify the user to insert the name.</li> </ul>
i3train.fimm.com.my says Please insert Contact Number.. 	<ul style="list-style-type: none"> <li>• Popup message to notify the user to insert the contact number.</li> </ul>
i3train.fimm.com.my says Please insert Designation.. 	<ul style="list-style-type: none"> <li>• Popup message to notify the user to insert designation.</li> </ul>
i3train.fimm.com.my says Please insert Email Address.. 	<ul style="list-style-type: none"> <li>• Popup message to notify the user to insert the email address.</li> </ul>
i3train.fimm.com.my says Please insert Training Title.. 	<ul style="list-style-type: none"> <li>• Popup message to notify the user to insert the training title</li> </ul>

<p>i3train.fimm.com.my says</p> <p>Date cannot be back dated..</p> <p>OK</p>	<ul style="list-style-type: none"> <li>• Popup message to notify the user the date entered for end proposed date cannot be back dated</li> </ul>
<p>i3train.fimm.com.my says</p> <p>This application is categorized as AD-HOC application. Please insert REMARK field.</p> <p>OK</p>	<ul style="list-style-type: none"> <li>• Popup message to notify the user that application is categorized as AD-HOC</li> </ul>
<p>i3train.fimm.com.my says</p> <p>Duplicate Record ! ...</p> <p>OK</p>	<ul style="list-style-type: none"> <li>• Popup message to notify the user that the record is duplicated where it is already in the database</li> </ul>
<p>i3train.fimm.com.my says</p> <p>Are you sure to exit?</p> <p>OK Cancel</p>	<ul style="list-style-type: none"> <li>• Popup message to ask for a confirmation from the user to exit the application.</li> </ul>
<p>i3train.fimm.com.my says</p> <p>The Feedback form is still pending..</p> <p>OK</p>	<ul style="list-style-type: none"> <li>• Popup message to notify the user that the form is still pending</li> </ul>

## 6.2 BUTTON

This part explains about the button function on this CPD Tracker application.

BUTTON/ICON	DESCRIPTIONS
	<ul style="list-style-type: none"><li>This is a home button, it used to return at the CPD Tracker Main page.</li></ul>
	<ul style="list-style-type: none"><li>This is a logout button, it used to logout from the system.</li></ul>
	<ul style="list-style-type: none"><li>This is a login button, it used to login into the system.</li></ul>