




**USER MANUAL**

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

**MODULE: CONTINUING PROFESSIONAL  
DEVELOPMENT (CPD)  
(PROGRAM CANCELLATION)  
GROUP: TRAINING PROVIDER**


<b>AGENCY NAME</b>	<b>:</b>	<b>FEDERATION OF INVESTMENT MANAGERS MALAYSIA (FIMM)</b>
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 <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	i

## DOCUMENT DESCRIPTION


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

Document Information	
<b>Project Name</b>	SUPPLY, DESIGN, DEVELOPMENT, INSTALLATION, TESTING, COMMISSIONING AND MAINTENANCE OF REGISTRATION SOFTWARE FOR FEDERATION OF INVESTMENT MANAGERS MALAYSIA (FIMM)
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 <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	i

## DOCUMENT CONTROL

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


## LIST OF TABLES

Table 1: Acronym Table ..... xiv

Table 2: Abbreviation Role Table ..... xv


## 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


	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	vii

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

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


	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	viii

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

	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	ix

CN	Credit Note
IDD	Integration Design Document

Table 1: Acronym Table


	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	x

## 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*



	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	11

## 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](mailto:itsupport@fimm.com.my)

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

	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	12

## 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.

#### 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**.

FIMM Federation of Investment Managers Malaysia	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	13

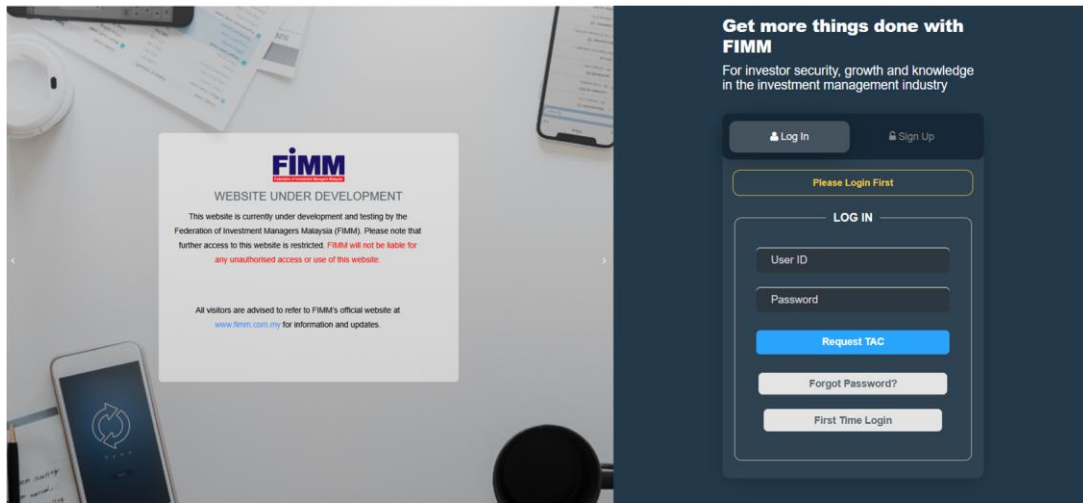


Diagram 1: FCS Homepage Display

## Enter Your Credentials

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

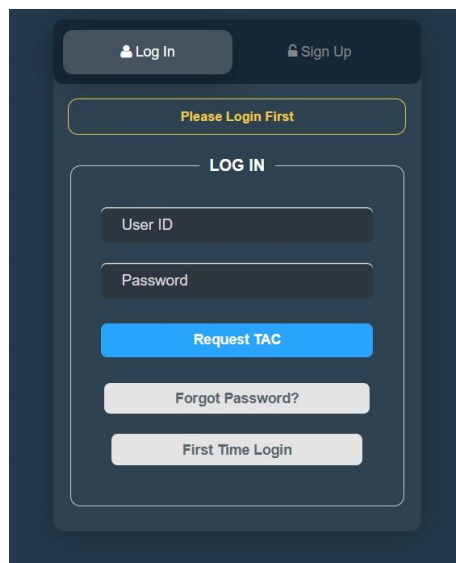



Diagram 2: Log in Display

## Successful Login

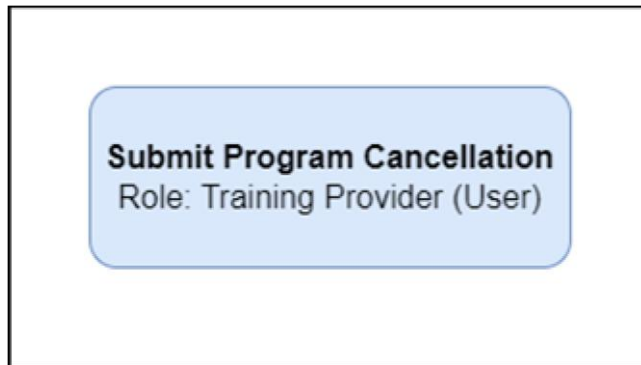
- Click **Login** button and the system will be redirected to the FCS System dashboard.


	<b>Project</b> Federation of Investment Managers Malaysia (FIMM)	<b>Reference</b> ZANKO/FIMM/UM/V1.0	<b>File</b> User Manual Document	<b>Version</b> 1.1	<b>Date</b> 10/04/25	<b>Page</b> 14
-----------------------------------------------------------------------------------	------------------------------------------------------------------------	----------------------------------------	-------------------------------------	-----------------------	-------------------------	-------------------

## 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	15

### 3.5.1.2 Manual Step

#### Cancel Program

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

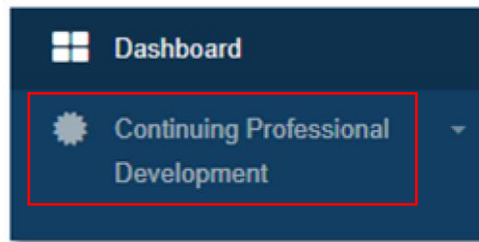


Diagram 125: Menu

2. Click submenu Pre-Vetting.

#### Notes:

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

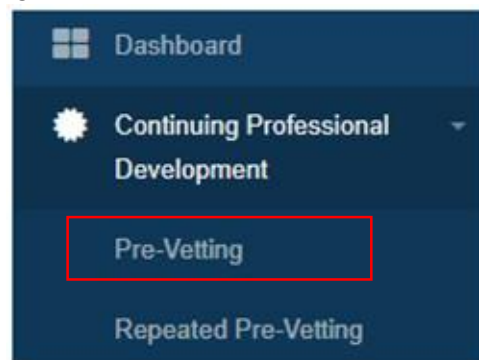


Diagram 126: Submenu

3. System will show 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	16

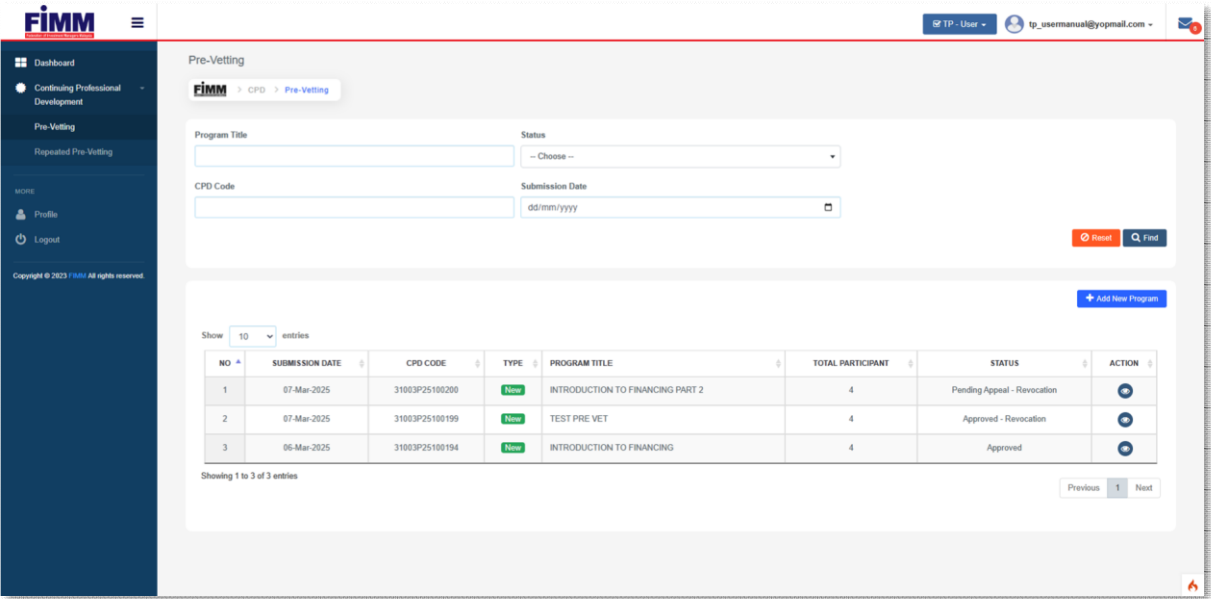



Diagram 127: List of Pre-Vetting

4. Under column Action, user click .

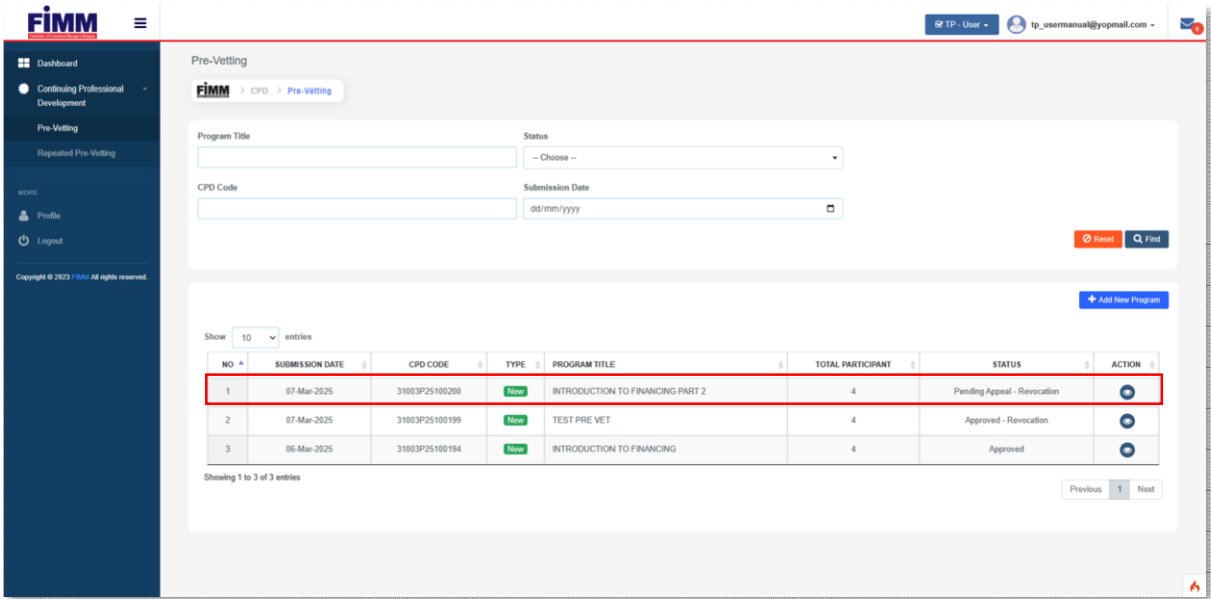


Diagram 128: List of Pre-Vetting

5. System will display the program details.

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	17

FIMM

Federation of Investment Managers Malaysia

Dashboard

Continuing Professional Development

Pre-Vetting

Repeated Pre-Vetting

MORE

Profile

Logout

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Pre-Vetting

FIMM

> CPD > Pre-Vetting

Details

Log

1 Program Details

2 Participant Details

Training Provider Details

Training Provider Name

TRAINING PROVIDER USER MANUAL

Email Address

TP\_USERMANUAL@YOPMAIL.COM

Training Provider Code

31003

Contact Number

0112365478

Submitted By

MAISARAH BINTI ALI

Program Details

New Program

Program Title

INTRODUCTION TO FINANCING

Start Date

07/03/2025

End Date

07/03/2025

Session

PM

Venue

FIMM

Total Hours

6.0

Mode of Delivery

PHYSICAL TRAINING PROGRAMMES (FACE TO FACE)...

CPD Point

8

Speakers

NO	NAME	PROFILE
1	IZA	<a href="#">Module 1.pdf</a>

Required Information

Upload File

NO	FILE	ACTION
1	Module 1.pdf	

Additional Information

NO	FILE	ACTION
1	Module 1.pdf	

Back

Cancel Program

Next >>

Diagram 129: Form Program Cancellation

6. User click 


Cancel Program

 to cancel the program.

Confirm to proceed?

YES

NO

	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	18

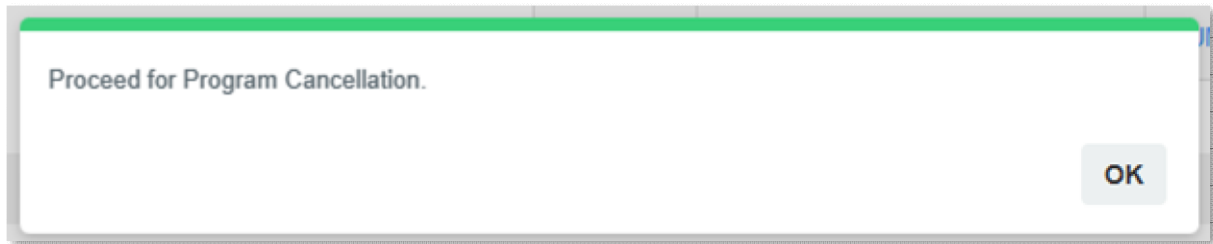


Diagram 130: Popup Message

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

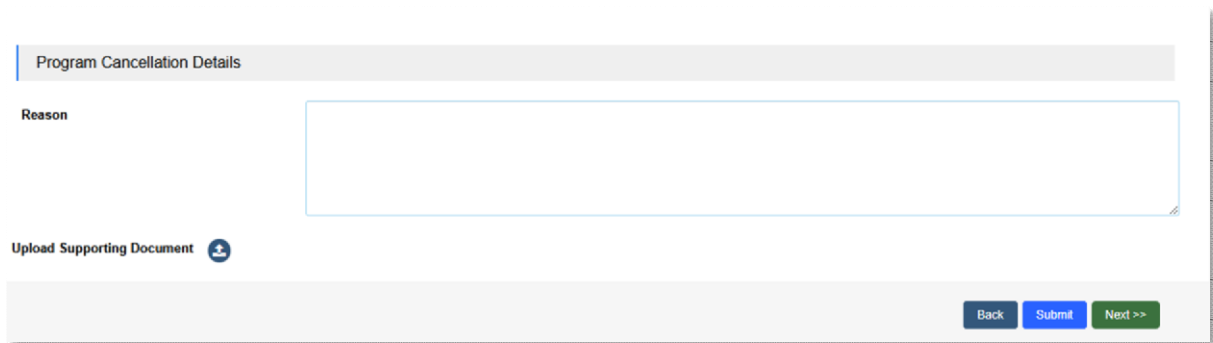
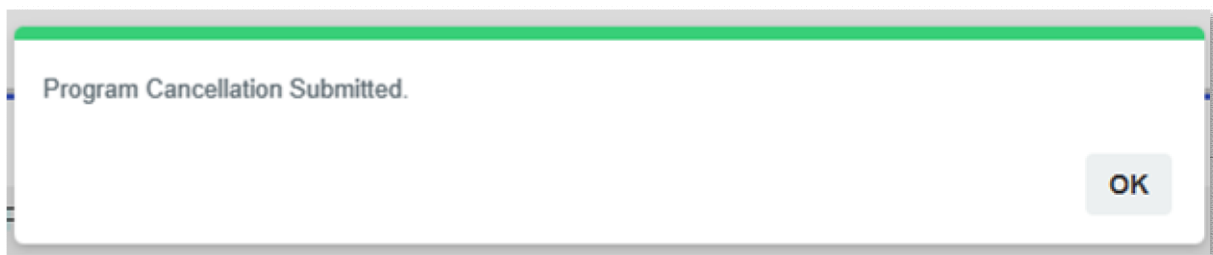
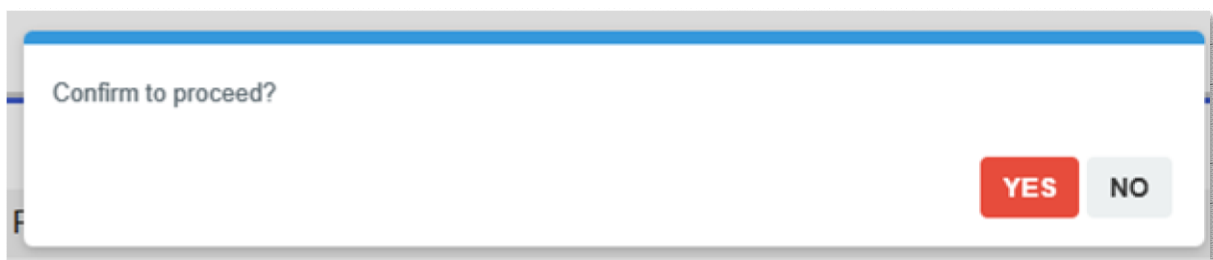


Diagram 131: Form Program Cancellation

- ii. User click  to cancel the program.





FIMM Federation of Investment Managers Malaysia	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	19

Diagram 132: Popup Message

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

Program Cancellation Details

Reason

Reason required!

Upload Supporting Document

Document Required

Diagram 133: Form Program Cancellation

## View Application and Log

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



Pre-Vetting

Program Title

Status

CPD Code

Submission Date

Reset Find

Add New Program

Show 10 entries

NO	SUBMISSION DATE	CPD CODE	TYPE	PROGRAM TITLE	TOTAL PARTICIPANT	STATUS	ACTION
1	06-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	

Showing 1 to 3 of 3 entries

Previous 1 Next

Diagram 134: List of Pre-Vetting

9. System will display:

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	20

i. Tab Details


The screenshot shows the FIMM Pre-Vetting form with the 'Details' tab selected. 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 BINTI ALI).
- Program Details:** Includes a 'New Program' button, 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)), and CPD Point (8).
- Speakers:** A table with columns NO, NAME, and PROFILE. It contains one entry: NO 1, NAME XCDC, 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 [Upload](#).
- Additional Information:** A table with columns NO, FILE, and ACTION. It contains one entry: NO 1, FILE Module 1 pdf, ACTION [Upload](#).
- Program Revocation Details:** Includes a Reason field (FIMM revoke this program) and an Upload Supporting Document field.


The 'Details' tab is highlighted with a red box. The 'Log' tab is also visible.

Diagram 135: Form Program Cancellation

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

	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	21

Pre-Vetting


> CPD > Pre-Vetting

Details

Log

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-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	-

Back

Diagram 136: Log