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)
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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.

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LIST OF TABLES

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

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
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

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

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

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**.
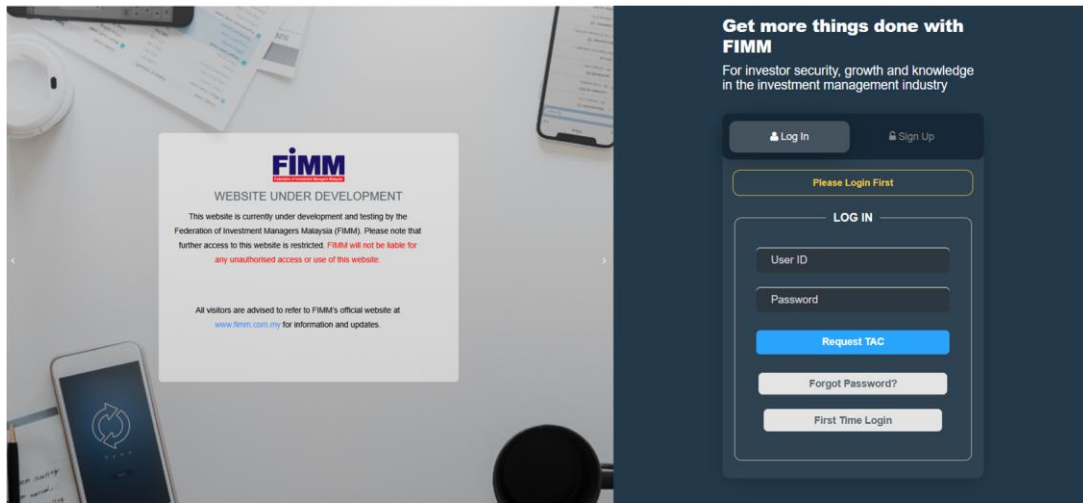
Diagram 1: FCS Homepage Display

Enter Your Credentials

4. System will show sign in page, User need to insert this item
   - User ID
   - Password
   - TAC
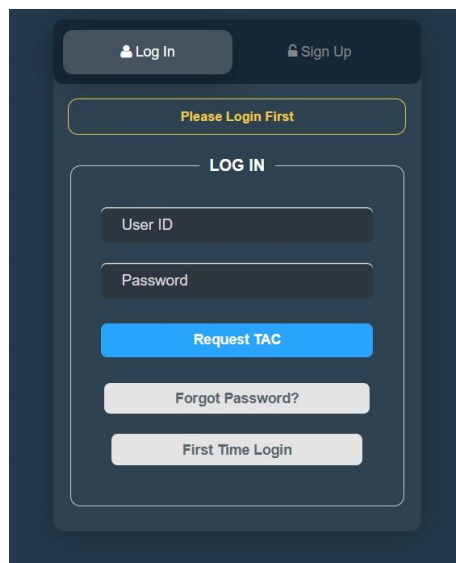
Diagram 2: Log in Display

Successful Login

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

3.5   Program Cancellation

3.5.1 Submit Program Cancellation

3.5.1.1 Process Flow
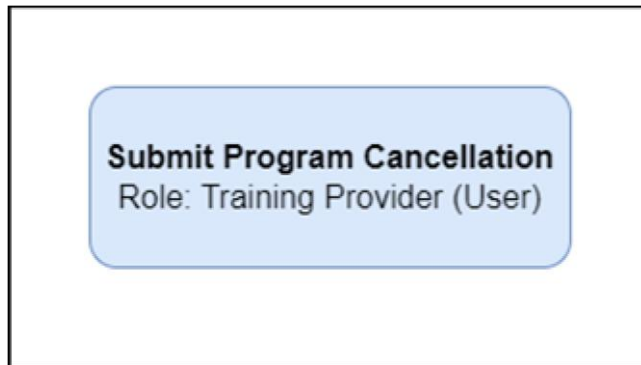
Submit Program Cancellation
Role: Training Provider (User)

3.5.1.2 Manual Step

Cancel Program

1.   Click menu Continuing Professional Development. System will display submenu under Continuing Professional Development.
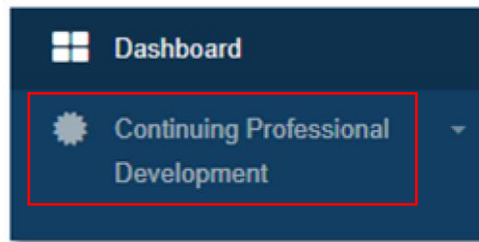
Diagram 125: Menu

2.   Click submenu Pre-Vetting.

Notes:
This manual covers cancellation process for Pre-Vetting but it is also applicable to Repeated Pre-Vetting.
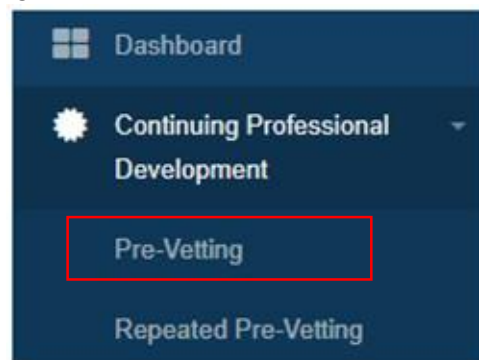
Diagram 126: Submenu

3.   System will show List of Pre-Vetting.
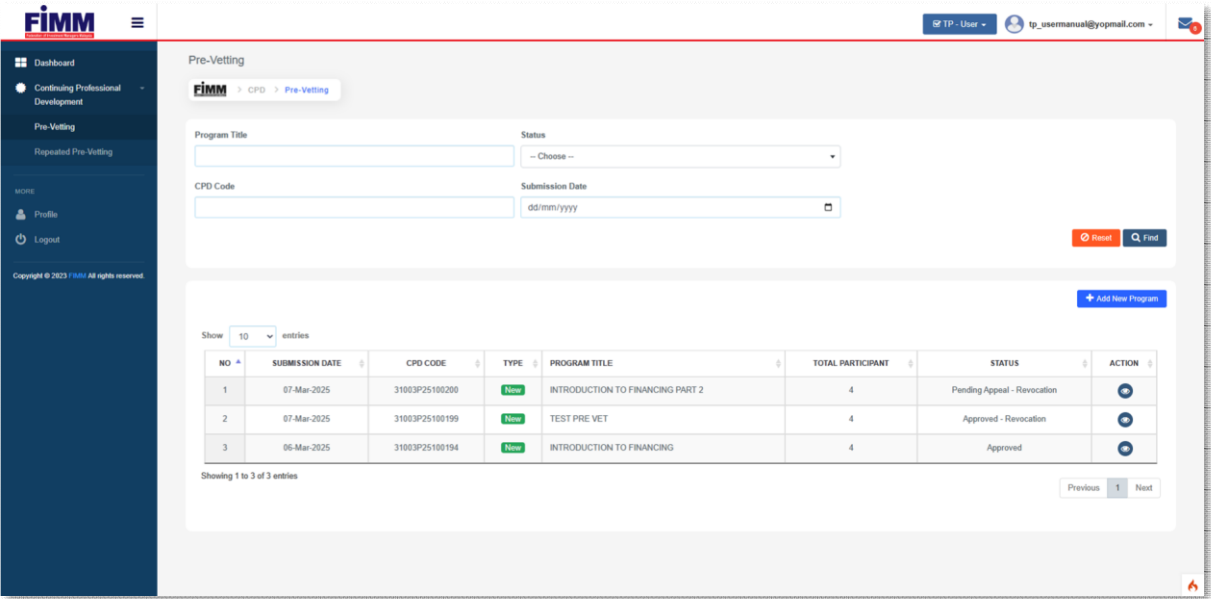
Diagram 127: List of Pre-Vetting

4. Under column Action, user click .
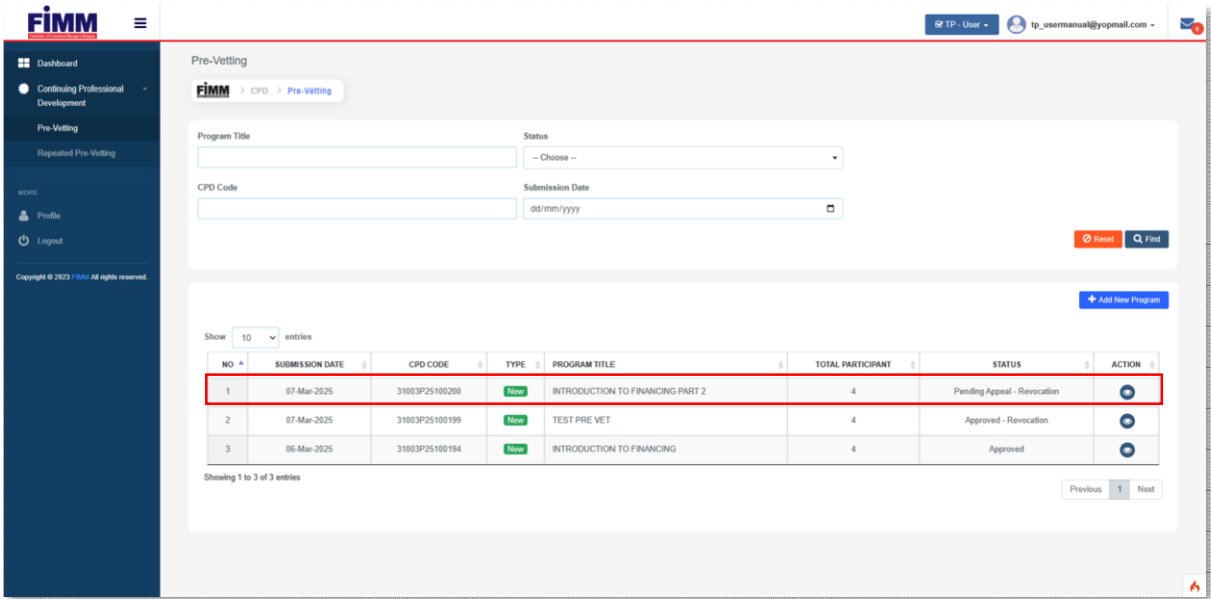
Diagram 128: List of Pre-Vetting

5.   System will display the program details.

Diagram 129: Form Program Cancellation

6. User click **Cancel Program** to cancel the program.
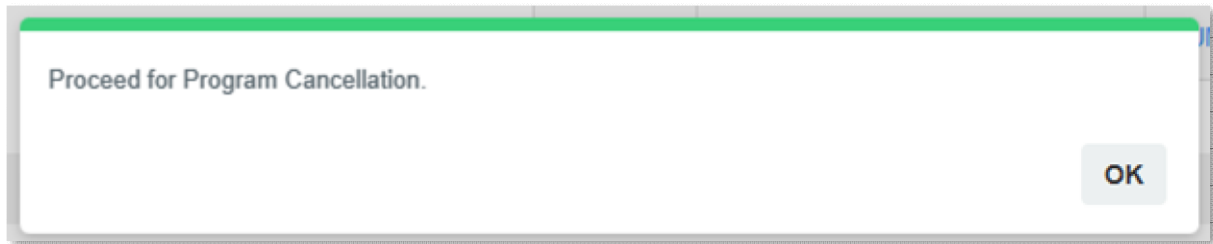
Diagram 130: Popup Message

7. System will bring to another form. User fill in details:
   i. Program Cancellation Details
      a) Reason
      b) Upload Supporting Document
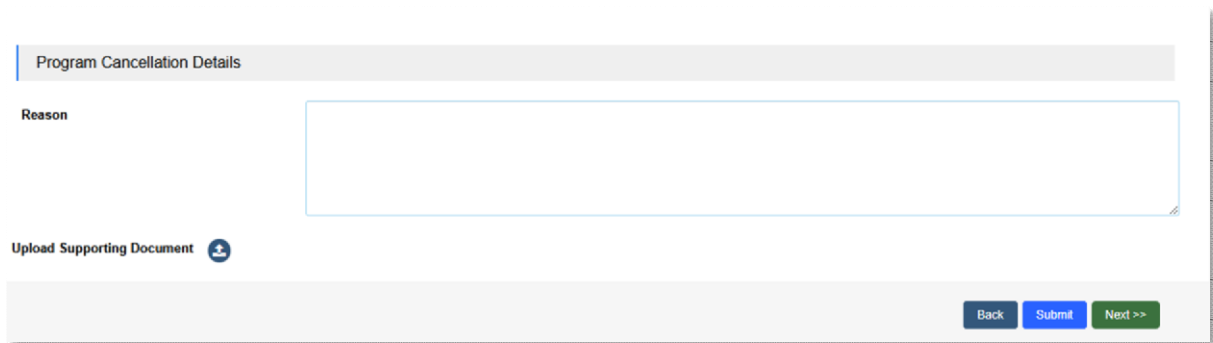
Diagram 131: Form Program Cancellation

ii. User click [Submit] to cancel the program.
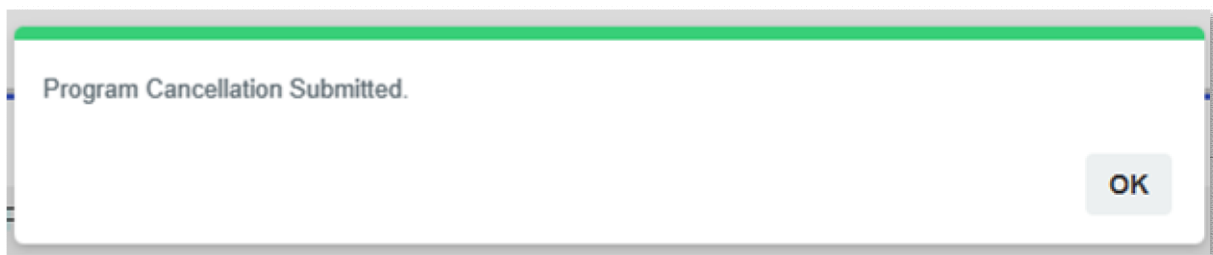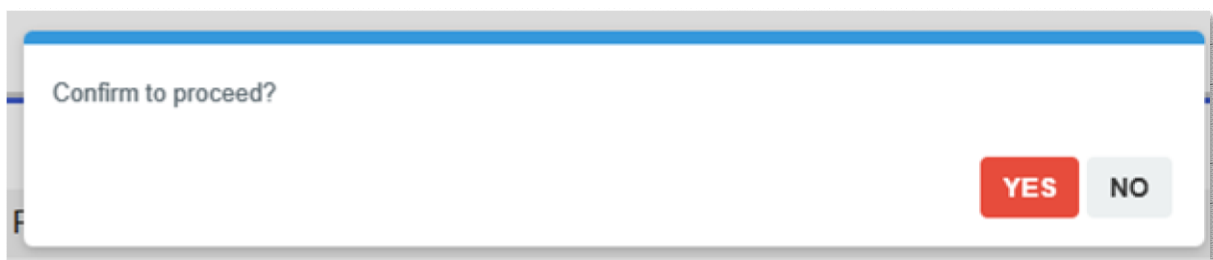
Diagram 132: Popup Message

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

Diagram 133: Form Program Cancellation

View Application and Log

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

Diagram 134: List of Pre-Vetting

9. System will display:

i. Tab Details

Diagram 135: Form Program Cancellation

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

Diagram 136: Log