

Contents

Introduction	2
LMS homepage	4
Main courses page	5
Inside an individual topic / category page	6
Certificate	8
How to register	9
Start a course	12
Tests on the website content	14
Get a certificate	15
User profile	16
Edit profile	17
Training log	18
Certificates	19
Company administrators - specific functions	20
Team managers - specific functions	25
Individual users - specific functions	26
Learning plans - introduction	27
Add a new plan	30
Certified programme	32
Edit learning plan	33
View plan details	36
Bookmarks	40
Add/Edit My Learning	41
What's new	51

Our highly-interactive Learning Management System (LMS) is a low-cost, plug-and-play platform hosting a comprehensive suite of e-learning courses and assessments - to enhance the skills and knowledge of relationship managers, advisers and other professionals in Asia's wealth management industry.

The LMS helps users meet their continuing professional development (CPD) obligations with integrity and certainty by measuring, tracking and authenticating their performance and understanding.

Our courses cover the following categories:

- » Fundamentals of Wealth Management
- » Acquisition and Retention of Clients
- » Regulation and Compliance
- » Asset Classes and Investment Styles
- » Product Training
- » Planning Toolkit
- » Constructing Portfolios
- » Estate Planning and Wealth Transfer
- » Understanding Investor Behaviour
- » Business Strategy
- » Market Updates and Analysis

How does the LMS work?

We have designed this to be as user-friendly as possible. LMS users can logon from anywhere at any time. And users can choose from a range of individual courses.

Our courses are divided into *Learning and Talent Development Modules* and *Continuous Education Tests*, clearly marked and separated on individual course pages.

The *Learning and Talent Development Modules* comprise in-depth, stand a-alone courses which last between 30 minutes to 1 hour each. The *Continuous Education Tests* last only a few minutes. They are linked to videos and articles on www.hubbis.com to measure understanding of the content and allow users to log the equivalent amount of time towards their CPD.

It is also possible for individuals to quickly and easily create their own custom-made learning plans - depending on their experience and training needs.

Further, we have enabled the company administrator and team managers to create bespoke learning plans for individuals and teams - with just a few clicks - to meet the firm's training and development needs and goals. If they wish, administrators can also create a certified programme on behalf of their own institution.

All courses are easy to use and navigate - and test the user for their understanding of the subject matter.

Each course is also automatically programmed to force learners to view all content on each page before they are allowed to move forward. This feature is intended to make them more valuable and effective from a training and development perspective.

The assessments for every course involve a random selection of test questions, so users cannot simply copy the results from a colleague. If they pass the assessment (pass marks are 70% for *Learning and Talent Development Modules* and either 70% or 75% for *Continuous Education Tests*), their result and equivalent CPD time are automatically logged against their profile - and they receive an authenticated certificate with a unique user ID.

Administrators can also log all other training their staff do - including classroom / face-to-face training, seminars, workshops or conferences. This is added to each user's training log and will appear on their certificate. Either administrators can add the details of face-to-face training on behalf of their staff. Or administrators can review, edit or delete details of face-to-face training which their staff have submitted for your approval. Administrators also have the option to upload their own e-learning modules, and enable / disable existing courses (or delete them), as well as enroll staff on new face-to-face training courses.

For all users, as they view individual videos and articles on www.hubbis.com - they can bookmark the ones they want to add to their training schedule. At any time they can see a list of all content previously bookmarked. And from this page they can either remove bookmarks or add items already bookmarked to existing learning plan(s).

In addition to being able to print individual certificates, the LMS also provides users and their managers with printable summaries of all certification awarded, by date range, specifying - which courses they have taken; when they took the courses; and the grade they achieved.

Users can maintain access to their complete training record and certificates if they move to another institution.

What are the different levels of user access?

There are 3 levels of access available on our LMS (the Team Manager level is optional).

1. Company Administrator

- » This is a designated individual who acts as the main administrator for a company
- » The administrator can view and manage all their own company's data
- » The administrator can create and manage the company's own users
- » The administrator can run reports for any user in their own company
- » The administrator can create bespoke learning plans for individuals and teams
- » The administrator can log all non-Hubbis training their staff do – as well as approve / edit / remove non-Hubbis training submitted by staff for approval.
- » The administrator can upload their own e-learning modules
- » The administrator can enable / disable existing courses, or delete them

2. Team Manager

- » Team managers can create bespoke learning plans for individuals in their team
- » Team managers can view the data for their own team only
- » Team managers can run reports for their own team only

3. Individual User

- » Individuals can take courses
- » Individuals can create their own custom-made learning plans
- » Individuals can run reports for themselves only
- » Individuals can look up and print certificate summaries for themselves only
- » Individuals can submit for approval by their administrator the details of face-to-face training they have already completed

All users have access to their own profiles and the glossary of terms, as well as the ability to bookmark any training they want to add to existing learning plans.

Customised to your organisation

We customise the look of the LMS to include your organisation's logo.

We can also change the colour scheme of the banners at the top and bottom in line with your branding.

LMS PRIVACY & SECURITY

- » Nobody gets access to your personal details or any other information, other than Hubbis.
- » We back-up and store all information and training records on all users for verification purposes daily.

CONTACT US

Michael Stanhope
Chief Executive Officer
T 852 2563 8766
michael.stanhope@hubbis.com



You are logged in as [User Name \(Logout\)](#)

- Home
- Courses
- [hubbis.com](#)

Site Administration

- Reports
- Company admin
- Team admin



Add/Edit My Learning



Bookmarks



Learning Plans



What's New



Help



Feedback

Welcome

Welcome to the Hubbis Learning Management System – containing our e-learning courses for financial professionals in the Asian wealth management industry.

The courses are divided into in-depth **Learning and Talent Development Modules** and short **Continuous Education Tests**. This content provides targeted, independent, strategic and up-to-date training on the critical skills, knowledge, products, and investment and business strategy required to offer suitable and trusted advice to clients.

We hope you enjoy your training experience.



Courses

View the topics we cover in our training.

[Open ▶](#)



Profile & Reports

Access your personal profile, training reports and certificates.

[Open ▶](#)



Learning Plans

Custom-made training for you.

[Open ▶](#)



Glossary

An interactive glossary of relevant wealth management terms for you.

[Open ▶](#)



Copyright © 2012. Hubbis.com, Inc. All rights reserved.
T 852 2563 8900 | E enquiries@hubbis.com | [Disclaimer](#)

This shows the individual course categories - which cover a variety of key subject areas within wealth management in Asia. Each category then has its own mini homepage listing all courses within that category.

Click on "Click to show search fields" to show / hide the search fields.

After viewing the search results, or on individual category pages, you can enable / disable courses for your learners.

hubbis

You are logged in as [\[User Name\]](#) (Logout)

Home Courses hubbis.com

Hubbis > Courses

Site Administration

- Reports
- Company admin
- Team admin

Add/Edit My Learning

Bookmarks

Learning Plans

What's New

Help

Feedback

Courses

On this page, you can enable / disable courses for your learners.

Search [Click to show search fields](#)

EITHER search for a course here

Select category: All categories

Course type: All types

Course level: All levels

Topics: All topics

Date range: 22 January 2010

10 May 2012

Keywords:

Search Reset

Course categories

OR open a category page here

- Fundamentals of Wealth Management
- Acquisition and Retention of Clients
- Regulation and Compliance
- Asset Classes and Investment Styles
- Product Training
- Planning Toolkit
- Constructing Portfolios
- Estate Planning and Wealth Transfer
- Understanding Investor Behaviour
- Business Strategy
- Market Updates and Analysis

Copyright © 2012. Hubbis.com, Inc. All rights reserved.
T 852 2563 8900 | E enquiries@hubbis.com | [Disclaimer](#)

This category homepage shows the *Learning and Talent Development Modules* in yellow, and the *Continuous Education Tests* in orange.

Click on "Click to show search fields" to show / hide the search fields.

For each course, users can see:

- » The equivalent CPT time for successful completion
- » The link to the course outline - and video / article if relevant
- » The level at which the course is targeted
- » Their course status - either "Not started", "In progress", or "Passed"
- » Access to the Certificate for the individual module when passed
- » Whether the individual course is enabled or disabled for your staff

The screenshot shows the Hubbis website interface. At the top, there is a navigation bar with 'Home', 'Courses', and 'hubbis.com' buttons. The main content area is titled 'Fundamentals of Wealth Management' and includes a search bar with a 'Click to show search fields' link circled in red. Below the search bar are filters for Course type, Course level, Topics, Date range, and Keywords. A table of courses is displayed, with columns for Course name, Action, CPT, Level, Date, Status, and Enable. The first course, 'Why wealth management matters', has its 'Enable' checkbox circled in red.

Course name	Action	CPT	Level	Date	Status	Enable
Why wealth management matters	+ [icon]	55 minutes	Beginner	4 May, 2011	Passed	<input checked="" type="checkbox"/>
Wealth management in Asia	+ [icon]	50 minutes	Beginner / Intermediate	3 Feb, 2010	In progress	<input checked="" type="checkbox"/>
The role of wealth providers	+ [icon]	55 minutes	Beginner	3 Feb, 2010	In progress	<input checked="" type="checkbox"/>
Creating a successful service	+ [icon]	50 minutes	Beginner / Intermediate	3 Feb, 2010	In progress	<input checked="" type="checkbox"/>
Claude Haberer on a day-in-the-life	+ [icon]	9 minutes	---	16 Dec, 2011	Not started	<input checked="" type="checkbox"/>
Marcus Leese on a day-in-the-life	+ [icon]	9 minutes	All levels	2 Dec, 2011	Not started	<input checked="" type="checkbox"/>
Keith Harrison on a day-in-the-life	+ [icon]	7 minutes	All levels	18 Nov, 2011	Not started	<input checked="" type="checkbox"/>
Mykolas Rambus on ultra wealthy	+ [icon]	5 minutes	All levels	18 Nov, 2011	Not started	<input checked="" type="checkbox"/>

When you click on “Enable All” or “Disable All” the screen will show this image for a few seconds as the system updates.

The screenshot shows the Hubbis interface for the 'Fundamentals of Wealth Management' course. The page includes a search filter for 'All users' and two buttons, 'Enable all' and 'Disable all', which are circled in red. Below the search filter is a table of course details.

Course name	Action	CPT	Level	Date	Status	Enable
Why wealth management matters	+ [icon]	55 minutes	Beginner	4 May, 2011	Passed	[checkbox]
Wealth management in Asia	+ [icon]	50 minutes	Beginner / Intermediate	3 Feb, 2010	In progress	[checkbox]
The role of wealth providers	+ [icon]	55 minutes	Beginner	3 Feb, 2010	In progress	[checkbox]
Creating a successful service	+ [icon]	50 minutes	Beginner / Intermediate	3 Feb, 2010	In progress	[checkbox]
Claude Haberer on a day-in-the-life	+ [icon]	9 minutes	---	16 Dec, 2011	Not started	[checkbox]
Marcus Leese on a day-in-the-life	+ [icon]	9 minutes	All levels	2 Dec, 2011	Not started	[checkbox]
Keith Harrison on a day-in-the-life	+ [icon]	7 minutes	All levels	18 Nov, 2011	Not started	[checkbox]
Mykolas Rambus on ultra wealthy analysis	+ [icon]	5 minutes	All levels	18 Nov, 2011	Not started	[checkbox]
Christophe Beech on a day-in-the-	+ [icon]					[checkbox]

This 2-page Certificate is for a certain date range. It shows the different modules completed and passed, and has a unique user ID in the top right.



Certificate

Certificate ID: 1340681731

Date from: 31st January, 2011
Date to: 26th June, 2012

This is to certify that

Crooke, Andrew

Hubbis

has completed the following:

Hubbis Online Learning
Continuous Education Tests

David MacDonald on sales skills - Hubbis Forum 2011						
Skills	Knowledge	CPT Minutes	Score	Result	Completed	
50%	50%	30	75	Passed	15th Nov, 2011	

Regulatory review - October 2011	
Skills	Knowledge
50%	50%

...Continued

Skills	Knowledge	CPT Minutes	Score	Result	Completed
50%	50%	10	75	Passed	7th Jan, 2011

Greg Davies on tackling client biases						
Skills	Knowledge	CPT Minutes	Score	Result	Completed	
50%	50%	11	75	Passed	6th Jan, 2011	

Dan Draper on the ETF business						
Skills	Knowledge	CPT Minutes	Score	Result	Completed	
50%	50%	8	75	Passed	6th Jan, 2011	

Subtotal: 48 minutes

Andrew Crooke
Editor
Hubbis



Date from: 22nd June, 2010
Date to: 22nd June, 2011

Skills: 50% (24 minutes)
Knowledge: 50% (24 minutes)

Total: 48 minutes

Step 1

On our LMS homepage <http://www.hubbis.com/lms/> - users should click on “Create new account”.

The screenshot shows the Hubbis LMS homepage. At the top right, it says "You are not logged in. (Login)". Below the Hubbis logo, there are navigation tabs for "Home", "Courses", and "hubbis.com". The main content area is divided into two columns. The left column is titled "Returning to this website?" and contains a login form with fields for "Username" and "Password", a "Remember me" checkbox, and a "Login" button. Below the login form is a link that says "Yes, help me log in". The right column is titled "Is this your first time here?" and contains a list of 7 steps for creating a new account. At the bottom of this column is a button labeled "Create new account" which is circled in red. At the bottom of the page, there is a footer with the Hubbis logo, copyright information, and contact details.

Step 2

Users should fill in all their information. Required fields are marked.

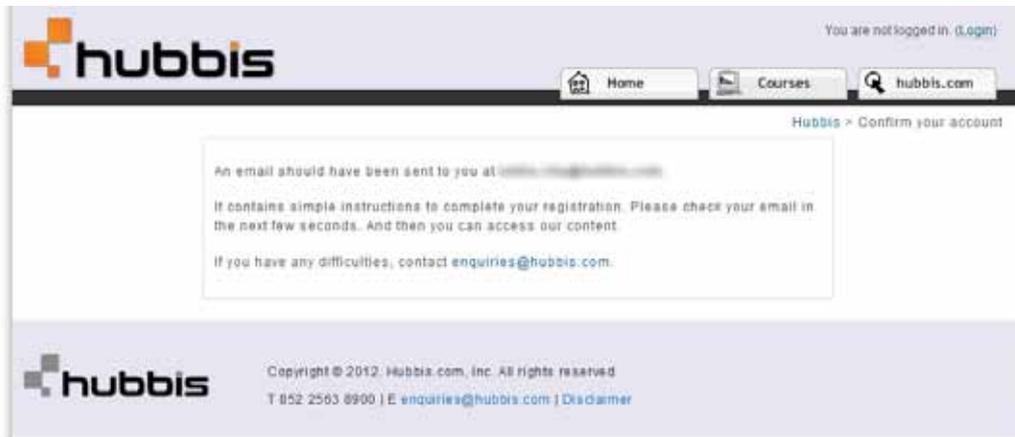
At the bottom of the form (as shown below), users MUST input both their company code and select the Team underneath.

Then click “Create my new account” to move to Step 3.

The screenshot shows a registration form with several fields. The fields are: "Job Title" (text input, value: Programmer), "Job Responsibility" (dropdown menu, value: Technology), "Topics of Most Interest (hold down Ctrl for multi select)" (checkbox list, value: Business Strategy / Management), "Type of institution" (dropdown menu, value: Other), "Company Code" (text input, value: 00000000), and "Team" (dropdown menu, value: Team 1). The "Company Code" and "Team" fields are circled in red. Below the form is a button labeled "Create my new account" and a "Cancel" button. At the bottom right, there is a note: "The required fields are marked with *". At the bottom of the page, there is a footer with the Hubbis logo, copyright information, and contact details.

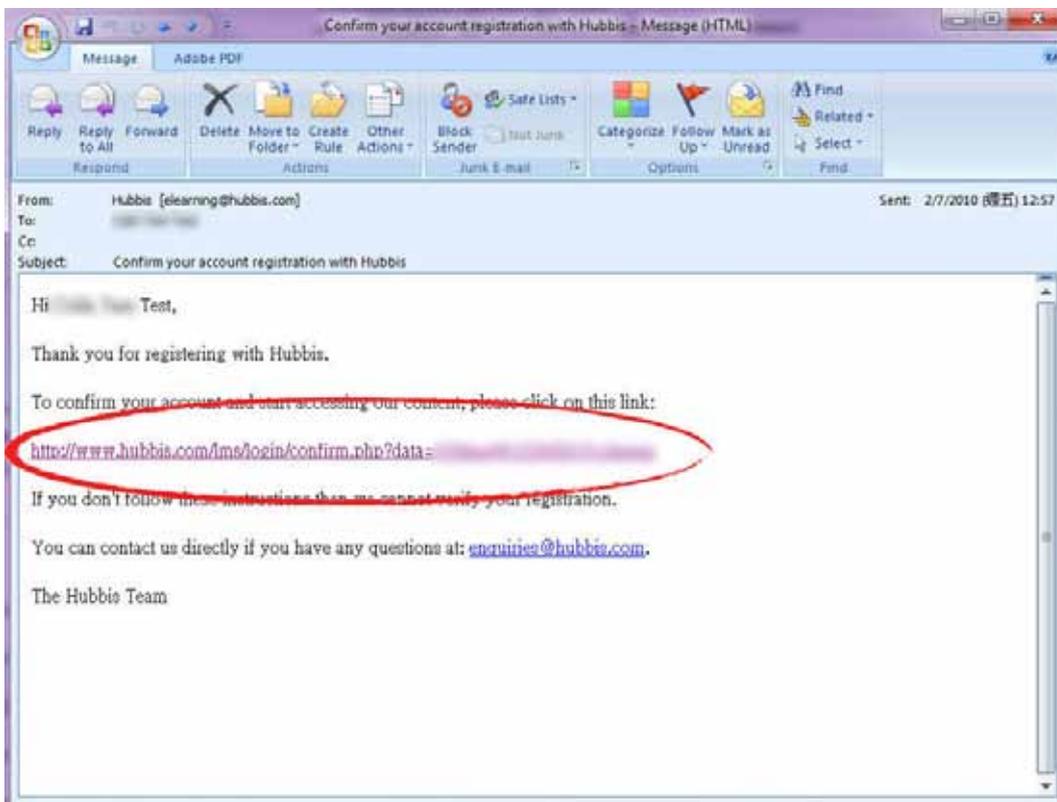
Step 3

An email will be sent to the individual user's email address.

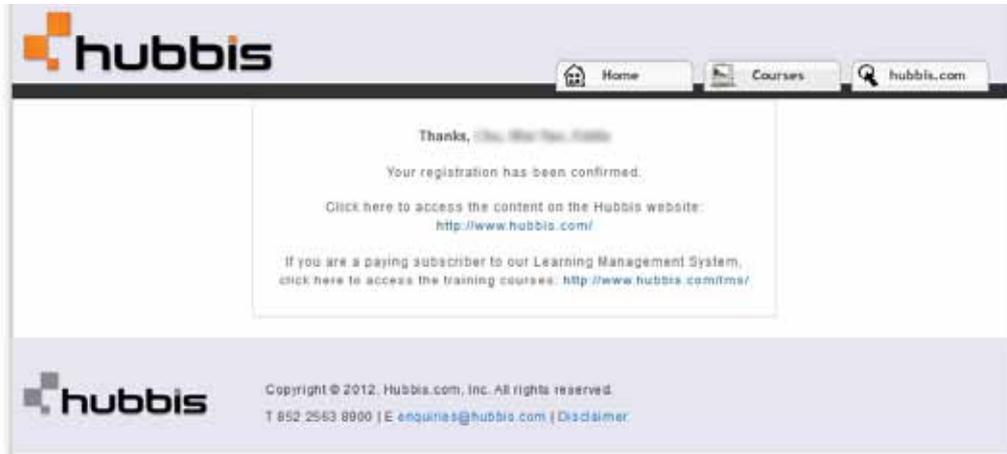


Step 4

Users should open the email in their inbox (or check their "Junk Mail" folder if they can't see the email in their inbox), and click on the URL to complete their registration.



Successful new registrations should see this screen.



Step 1

Inside the relevant category page, users can click on the individual course they want to take. They will then link to the summary page for that course. The pass marks are 70% for *Learning and Talent Development Modules* and either 70% or 75% for *Continuous Education Tests*.

The screenshot shows the Hubbis website interface. At the top, the user is logged in as 'User Name (Logout)'. The main navigation includes Home, Courses, and hubbis.com. The current page is 'Hubbis > Courses'. On the left sidebar, there are icons for 'Add/Edit My Learning', 'Bookmarks', 'Learning Plans', 'What's New', 'Help', and 'Feedback'. The main content area is titled 'Fundamentals of Wealth Management' and includes a search filter section with dropdowns for Course type, Course level, Topics, and Date range. Below the search filters is a table of course results. The first row, 'Why wealth management matters', is circled in red. The table columns are Course name, Action, CPT, Level, Date, and Status.

Course name	Action	CPT	Level	Date	Status
Why wealth management matters		55 minutes	Beginner	4 May, 2011	<input type="checkbox"/> Not started
Wealth management in Asia		50 minutes	Beginner / Intermediate	3 Feb, 2010	<input type="checkbox"/> Not started
The role of wealth providers		55 minutes	Beginner	3 Feb, 2010	<input type="checkbox"/> Not started
Creating a successful service		50 minutes	Beginner / Intermediate	3 Feb, 2010	<input type="checkbox"/> Not started

Step 2

Click on the "Start" button to launch the course.

The screenshot shows the course summary page for 'Why wealth management matters'. The breadcrumb trail is 'Hubbis > Courses > Fundamentals of Wealth Management > SCORMs/AICCs > Why wealth management matters'. The page title is 'Why wealth management matters'. A text box contains the following description: 'Why wealth management matters is designed to give relationship managers and financial advisers an introduction to the fundamentals of wealth management in Asia. Using lessons learned from the financial crisis, this course highlights the roles of the different components and players in the wealth management process, as well as the skill-set, training, education, product knowledge and other requirements for you to provide an effective wealth management service to clients.' Below the text box is a 'Start' button, which is circled in red. The footer includes the Hubbis logo, copyright information (© 2012), and contact details.

Step 3

A new window should open, and users can then see the course materials and follow the instructions.



Inside a course



Users can take a short test after viewing the relevant video or editorial content on www.hubbis.com. To do this, after logging on to the website, users can click on the *Continuous Education Test* button (as shown below). This links through to the LMS and where users can follow the instructions to take (and hopefully pass) the test to be able to log it as part of their CPD. Or users can add this test to either their Bookmarks or Learning Plan.

The screenshot shows the Hubbis website interface. At the top left is the Hubbis logo. On the right, it says "You are logged in as". Below this is a navigation menu with links for News, Videos, Articles, Experts, Topics, Glossary, Profiles, Directory, Learning, Events, and About. The breadcrumb trail reads "Hubbis > Articles > Indian wealth management - a developing landscape".

The main content area features the title "Indian wealth management - a developing landscape" and a sub-header "Articles". Below this is a link "RETURN TO FUNDAMENTALS OF WEALTH MANAGEMENT ARTICLES >>" and a search bar with the text "Search articles" and a "GO" button.

Below the article title are several action buttons: "Print this page", "Add your comment", "Email the editor", and "Forward to a friend".

The article text begins with "Amit Dassani of quant global wealth management reveals some of the latest wealth management developments in India, including client requirements and changes in fee structure in recent years." The date is listed as "Date: June 2011" and the tags are "Wealth management, India".

A list of actions is provided: "Watch the Video", "Download PDF", "Continuous Education Test" (circled in red), "Bookmark", and "Add to Learning Plan".

On the right side, there is a section titled "Other articles you might find interesting" with a list of four articles:

1. Financial Stability Board consults on template for global banks
2. A day-in-the-life: CEO – Keith Harrison
3. Creating non-equity ETFs in Asia
4. ICICI Securities' approach to wealth management in India

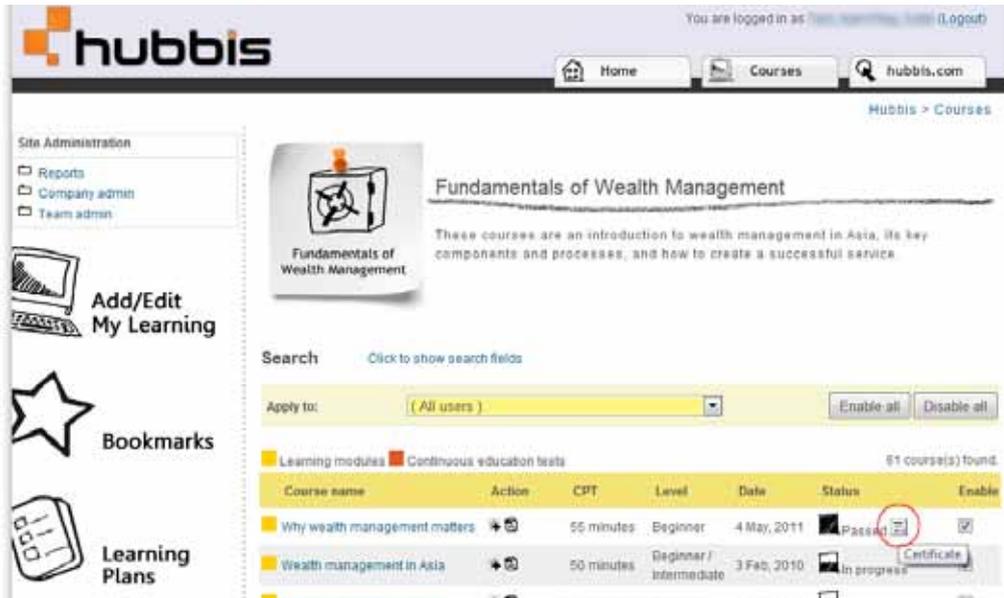
At the bottom right, there is a "Rate this article:" section with five stars and a "Share:" section with icons for Facebook, LinkedIn, and Twitter.

Below the article text, there are three bullet points:

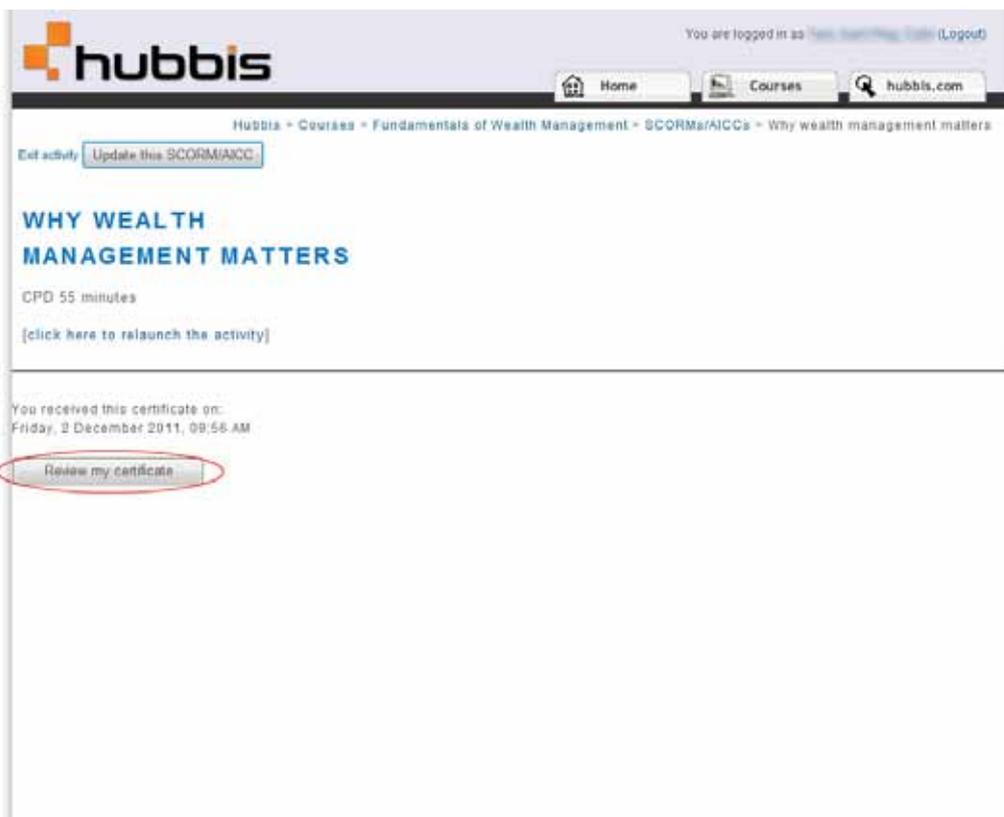
- There is a lot of legacy wealth from UHNW and HNW clients, which tends to be in non-liquid [asset classes](#) such as real estate – so they require customised solutions
- Clients should ask questions of firms in relation to their research and product capabilities, as well as ask for a consolidated reporting framework across [asset classes](#)
- The preferred fee model for clients and advisers alike is a combination

Once a user passes a course, they can click on the link to access and print their Certificate.

Users can retake a course at any time until they pass it - they simply go back to that individual course, click on the link and follow the instructions.



If a user has received a Certificate before for that individual course, they will need to click the "Review my certificate" button.



Users can access and edit their personal details at any time - either by clicking the “Open” button in the Profile & Reports box, or by clicking on their name at the top right of the page when logged on.

The screenshot displays the Hubbis Learning Management System interface. At the top, the user is logged in as 'tam.kam@hubbis.com'. The main content area features a 'Welcome' message and four primary action boxes: 'Courses', 'Profile & Reports', 'Learning Plans', and 'Glossary'. The 'Profile & Reports' box is circled in red, indicating the user's current location. A sidebar on the left provides navigation for 'Add/Edit My Learning', 'Bookmarks', 'Learning Plans', 'What's New', and 'Help'. A bottom navigation bar includes a 'Jump to...' dropdown and a breadcrumb trail: 'Hubbis > Tam, Kam Ping, Colin'. A separate window shows the user's profile details:

Your Photo	Country: Hong Kong
	City or Town: HK
	Title: Mr
	Phone Number: 852- 0000-0000
	Address Line 1: 22
	Address Line 2: 110
	Postcode: 00000
	Job Title: Other
	Job Responsibility: Wealth Planning
	Topics of Most Interest (hold down Ctrl for multi select): Business Strategy / Management
	Type of Institution: Other
	Team: Team 1
	Company Name: Hubbis
	Team Manager: 0000@hubbis.com
	Team Manager Contact: 0000@hubbis.com
	Team manager: Team 1
	Courses: Coult, FPHK AML, 2011 Continuing Education, EFG HK E-Learning, EFG SG E-learning, Online Training, Market Updates and Analysis, Business Strategy, Fundamentals of Wealth Management, Understanding Investor Behaviour, Estate Planning and Wealth Transfer, Constructing Portfolios, Planning Toolkit, Product Training, Asset Classes and Investment Styles, Regulation and Compliance, Acquisition and Retention of Clients
	First access: Tuesday, 5 January 2010, 09:26 AM (2 years 126 days)
	Last access: Thursday, 10 May 2012, 02:35 PM (49 days)
	Group: Hubbis

At the bottom of the profile window, there is a 'Change my password' button.

Company administrators can edit any user profile within their own company.

Team managers can edit any user profile within their team only.

Individual users can edit their own user profile only.

You are logged in as [Tom, Han-Ping, Collis](#) (Logout)

Home Courses hubbis.com

Hubbis > [Tom, Han-Ping, Collis](#) > Edit profile

Tom, Han-Ping, Collis

Profile **Edit profile** Training Log Certificates

General Show advanced

Username*

New Password* Unmask

Force password change*

Title*

Surname*

First Name*

English Name

Display Name

Email Address*

Alternative Email

Email display

Email activated

Company Name*

Select a country*

Phone Number*

Address Line 1

Address Line 2

City or Town

Postcode

Job Title*

Job Responsibility*

Topics of Most Interest (hold down Ctrl for multi select)*

- Business Strategy / Management
- Soft Skills / Client Relationship Management
- Investments / Products
- Asset Allocation / Portfolio Construction

Company administrators can view & print any user's Training log within their own company.
 Team managers can view & print the Training log of anyone within their team only.
 Individual users can view & print their own Training log only.

This section includes ALL the training users have already completed or that is in progress - either by a date range for all modules, or by individual modules.

To do this - on the profile page:

1. Click on the "Training log" tab
2. Select a date range, status or individual module and click on "Show me the results"
3. Click "Print my Training log" to get the information in a certificate format

This section enables you to review ALL the training you have already completed or that is in progress. To view your training record, you can either select the date range and do a look up for "All modules". Or you can select a date range and do a look-up by individual modules.

Training Log

Date From: 3 February 2010
 Date To: 10 May 2012
 Status: All Status
 Module: All Modules

[Show me the results](#)

[Print my Training Log](#)

Hubbis Online Learning

Team	First Name	Surname	Module	Skills / Knowledge	Status	Result	Last Access	Total Time	CPD (minutes)
Team 1			Why wealth management matters	50/50	Passed	100/100	10/05/12	03:25:30.89	55
Team 1			Building blocks of structured products 2012 Certificate	50/50	In progress	0/100	10/04/12		60
Team 1			Practical steps for wealth transfer	50/50	In progress	0/100	02/03/12	00:00:06.00	45
Team 1			Andrew Bryant on leadership Certificate	50/50	In progress	0/100	16/12/11	00:00:47.91	6
Team 1			CEO Interview - ING Vysya Bank, India Certificate	50/50	In progress	0/100	16/12/11	00:00:03.30	10
Team 1			The basics of derivatives	50/50	In progress	0/100	12/12/11	00:09:03.28	60
Team 1			David MacDonald on sales skills - Hubbis Forum 2011	50/50	In progress	0/100	09/12/11	00:03:16.57	30
Team 1			David MacDonald on sales skills -	50/50	Passed	100/100	06/12/11	00:00:44.16	20

Company administrators can view & print any user's Certificate within their own company.
Team managers can view & print the Certificate of anyone within their team only.
Individual users can view & print their own Certificate only.

This section refers to Certificates a user has already received - either by a date range for all modules, or by individual modules. It is NOT a record of all the training completed.

To do this - on the profile page:

1. Click on the "Certificates" tab
2. Select a date range or individual module and click on "Show me the results"
3. Click "Print my certificate summary" to get the information in a certificate format

hubbis

You are logged in as [\[User Name\]](#) (Logout)

Home Courses hubbis.com

Hubbis > [\[User Name\]](#) > Certificates

Tom, Name, Email, Gender

Profile Edit profile Training Log **Certificates**

This section refers to Certificates you have already received - it is NOT a record of ALL the training you have completed.
To view your full training record, click the "Training Log" tab.
However, to view the Certificates you can either select the date range and do a look up for "All modules".
Or you can select a date range and do a look-up by individual modules.
You then have the option to print the Certificate summary.

Certificates

From 3 February 2011
To 10 May 2012
Modules All

Show me the results

Print certificate summary

2011 Continuing Education

Module name	Skills	Knowledge	Minutes	Score	Result	Date
David MacDonald on sales skills - Hubbis Forum 2011	50	50	30	80	Passed	6th Dec, 2011

SUBTOTAL: 30 minutes

Fundamentals of Wealth Management

Module name	Skills	Knowledge	Minutes	Score	Result	Date
Why wealth management matters	50	50	55	100	Passed	2nd Dec, 2011

SUBTOTAL: 55 minutes

A Company Administrator can see 3 sections on the left menu: Reports, Company admin and Team admin.

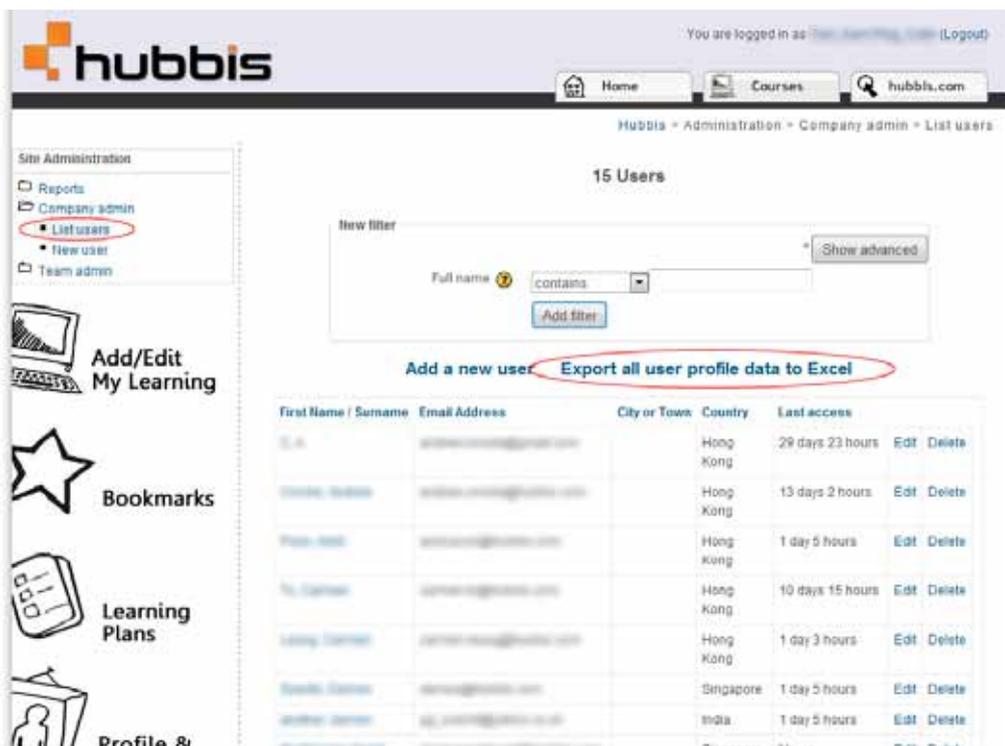
The “Company admin” button is to add new users, add new teams, and either assign users to a team or move users from one team to another.

The screenshot displays the Hubbis Learning Management System interface. At the top, the Hubbis logo is on the left, and the user is logged in as 'User Name' with a '(Logout)' link on the right. Below the logo, there are navigation buttons for 'Home', 'Courses', and 'hubbis.com'. The left sidebar menu is titled 'Site Administration' and includes the following items: Reports (Hours Credited, Detailed Training Report, Training Log), Company admin (List users, New user), and Team admin (List teams, New team, My Teams). Below the menu are icons for 'Add/Edit My Learning', 'Bookmarks', 'Learning Plans', 'What's New', 'Help', and 'All'. The main content area features a 'Welcome' message: 'Welcome to the Hubbis Learning Management System – containing our e-learning courses for financial professionals in the Asian wealth management industry. The courses are divided into in-depth Learning and Talent Development Modules and short Continuous Education Tests. This content provides targeted, independent, strategic and up-to-date training on the critical skills, knowledge, products, and investment and business strategy required to offer suitable and trusted advice to clients. We hope you enjoy your training experience.' To the right of the welcome message are four feature cards: 'Courses' (View the topics we cover in our training), 'Profile & Reports' (Access your personal profile, training reports and certificates), 'Learning Plans' (Custom-made training for you), and 'Glossary' (An interactive glossary of relevant wealth management terms for you). Each card has an 'Open' button.

A Company Administrator can list all company users by clicking on “List users”.

They can add a new user by clicking on “Add a new user”.

They can edit or delete individual users’ profiles.



Hubbis Administration > Company admin > List users

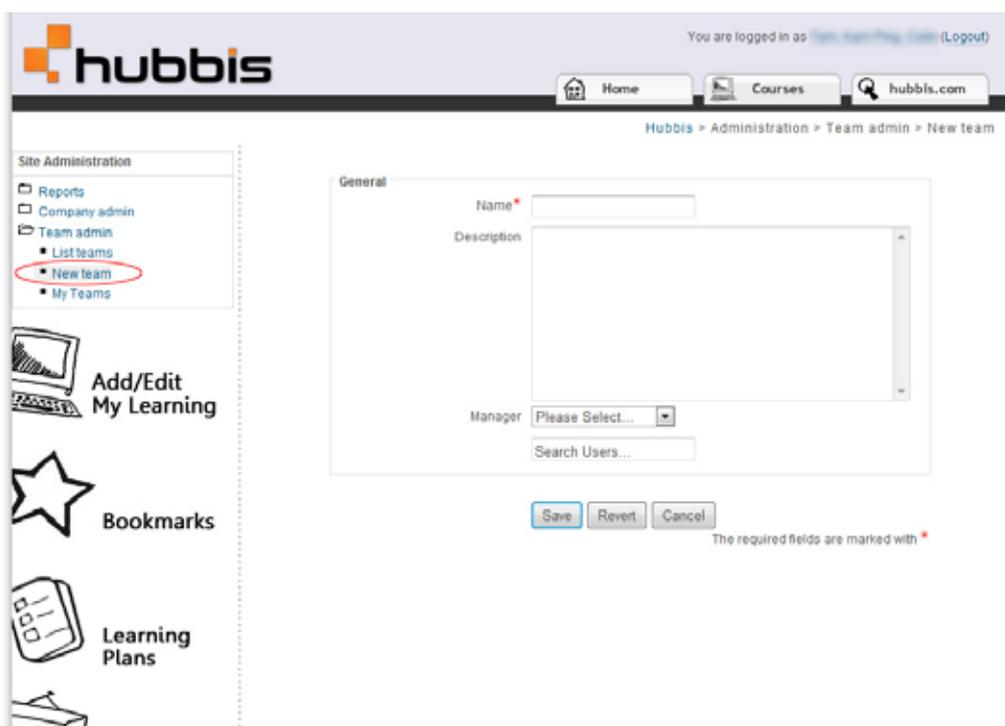
15 Users

New filter: Full name contains

[Add a new user](#) [Export all user profile data to Excel](#)

First Name / Surname	Email Address	City or Town	Country	Last access		
S.A.	www.hongkong.gov.hk		Hong Kong	29 days 23 hours	Edit	Delete
...	Hong Kong	13 days 2 hours	Edit	Delete
...	Hong Kong	1 day 5 hours	Edit	Delete
...	Hong Kong	10 days 15 hours	Edit	Delete
...	Hong Kong	1 day 3 hours	Edit	Delete
...	Singapore	1 day 5 hours	Edit	Delete
...	India	1 day 5 hours	Edit	Delete

A Company Administrator can also add new teams.



Hubbis Administration > Team admin > New team

General

Name*

Description

Manager

The required fields are marked with *

The “Reports” button allows a Company Administrator to can run a “Training Log” / “Detailed Training Report”, filtering the results by Team / User / Module.

The Company Administrator can view the following information in a “Training Log” report:

- » Name of individual
- » Module taken
- » Module status
- » Number of attempts
- » Result of most recent attempt
- » Date of most recent attempt
- » Time of most recent attempt
- » CPT accumulated for that module

You are logged in as [\[User Name\]](#) (Logout)

Home Courses [hubbis.com](#)

Hubbis > Administration > Reports > Training Log

Training Log

This section enables you to review ALL the training your users have already completed or that is in progress. To view their training record, you can either select the date range and do a look up for "All modules". Or you can select a date range and do a look-up by individual modules.

Training Log

Date From: 1 January 2010
 Date To: 10 May 2012
 Status: All Status
 Team: Team 1
 User: [User Name]
 Module: All Modules

[Search] [Download]

Team	Firstname	Surname	Module	Status	Result	Last Access	Total Time	CPD
Team 1	[User Name]	[User Name]	Adding alternatives to a portfolio	In progress	0/100	21/04/11	00:36:15.28	45
Team 1	[User Name]	[User Name]	Constructing appropriate portfolios	In progress	0/100	23/02/11	00:00:30.11	50
Team 1	[User Name]	[User Name]	Creating a successful service	In progress	0/100	22/06/11	00:00:52.75	50
Team 1	[User Name]	[User Name]	Investment basics	In progress	0/100	20/05/11	00:01:51.38	50
Team 1	[User Name]	[User Name]	Practical steps for wealth transfer	In progress	0/100	02/03/12	00:00:06.00	45
Team 1	[User Name]	[User Name]	Tailoring portfolios	In progress	0/100	18/10/10	00:02:13.35	50
Team 1	[User Name]	[User Name]	The building blocks of	In progress	0/100	01/03/11	00:00:07.00	50

The Company Administrator can view the following information for each individual module taken in a “Detailed Training Report”:

- » Question number
- » Question type
- » Learner response
- » Correct response
- » Learner result
- » Time spent by learner on that question

You are logged in as [User Name](#) (Logout)

Home Courses hubbis.com

Hubbis > Administration > Reports > Detailed Training Report

Detailed Training Report

Training Log

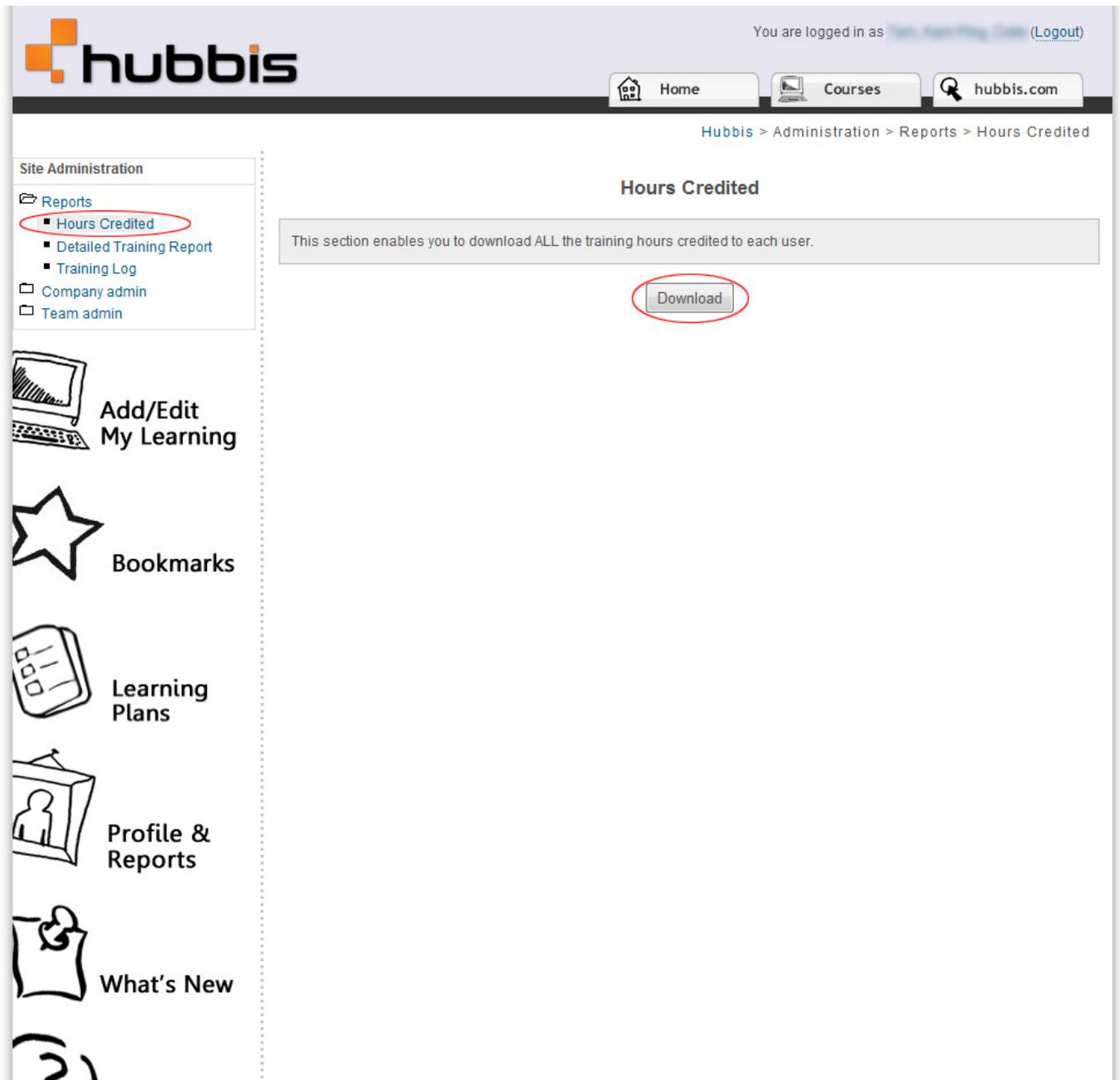
Date From: 1 January 2010
 Date To: 10 May 2012
 Status: All Status
 Team*: Team 1
 User*: User Name
 Module: All Modules

[Search] [Download]

The required fields are marked with *

Team	Firstname	Surname	Module	Status	Result	Last Access	Total Time	CPD
Team 1			Adding alternatives to a portfolio	In progress	0/100	21/04/11	00:36:15.28	45
Question No	Question Type	Learner Response	Correct Response	Result	Time Spent			
Team	Firstname	Surname	Module	Status	Result	Last Access	Total Time	CPD
Team 1			Constructing appropriate portfolios	In progress	0/100	23/02/11	00:00:30.11	50
Question No	Question Type	Learner Response	Correct Response	Result	Time Spent			
Team	Firstname	Surname	Module	Status	Result	Last Access	Total Time	CPD
Team 1			Creating a successful service	In progress	0/100	22/06/11	00:00:52.75	50

The Company Administrator can view the total number of training hours for each user by clicking on “Hours Credited” and then “Download”:



The screenshot shows the Hubbis web application interface. At the top right, it says "You are logged in as [username] (Logout)". Below the logo, there are navigation buttons for "Home", "Courses", and "hubbis.com". The breadcrumb trail reads "Hubbis > Administration > Reports > Hours Credited".

On the left sidebar, under "Site Administration", the "Reports" menu is expanded, and "Hours Credited" is highlighted with a red circle. Other options in the sidebar include "Detailed Training Report", "Training Log", "Company admin", and "Team admin". Below the sidebar are icons for "Add/Edit My Learning", "Bookmarks", "Learning Plans", "Profile & Reports", and "What's New".

The main content area is titled "Hours Credited" and contains a grey box with the text: "This section enables you to download ALL the training hours credited to each user." Below this text, a "Download" button is highlighted with a red circle.

A Team Manager can see 2 sections on the left menu: Reports and Team admin.

A Team Manager can do the same as a Company Administrator (see the pages above for reference) - except for their team's users only (not the whole company). Also, Team Managers cannot add new teams or assign users to teams.

The screenshot shows the Hubbis Learning Management System interface. At the top, the Hubbis logo is on the left, and the user is logged in as 'User Name' with a '(Logout)' link on the right. Below the logo is a navigation bar with 'Home', 'Courses', and 'hubbis.com' buttons. The left sidebar contains a 'Site Administration' menu with 'Reports' (sub-items: Detailed Training Report, Training Log) and 'Team admin' (sub-item: My Teams). Below the menu are icons for 'Add/Edit My Learning', 'Bookmarks', 'Learning Plans', 'What's New', 'Help', and 'Feedback'. The main content area is titled 'Welcome' and contains a message: 'Welcome to the Hubbis Learning Management System – containing our e-learning courses for financial professionals in the Asian wealth management industry. The courses are divided into in-depth Learning and Talent Development Modules and short Continuous Education Tests. This content provides targeted, independent, strategic and up-to-date training on the critical skills, knowledge, products, and investment and business strategy required to offer suitable and trusted advice to clients. We hope you enjoy your training experience.' To the right of the main content are five feature boxes: 'Courses' (View the topics we cover in our training), 'Profile & Reports' (Access your personal profile, training reports and certificates), 'Learning Plans' (Custom-made training for you), and 'Glossary' (An interactive glossary of relevant wealth management terms for you). Each box has an 'Open' button.

Individual users can update take courses, review their training log, print certificates and certificate summaries, update their user profiles, and access our glossary of terms.

The screenshot shows the Hubbis Learning Management System interface. At the top, the Hubbis logo is on the left, and the user is logged in as 'John Doe' with a '(Logout)' link on the right. Below the logo is a navigation bar with 'Home', 'Courses', and 'hubbis.com' buttons. A vertical sidebar on the left contains icons and labels for 'Add/Edit My Learning', 'Bookmarks', 'Learning Plans', 'What's New', 'Help', and 'Feedback'. The main content area is titled 'Welcome' and contains a welcome message, a paragraph about course content, and a sentence 'We hope you enjoy your training experience.' To the right of the main content are five yellow boxes, each with an icon, a title, a description, and an 'Open' button: 'Courses' (laptop icon), 'Profile & Reports' (person icon), 'Learning Plans' (calendar icon), and 'Glossary' (book icon). The footer contains the Hubbis logo, copyright information for 2012, and contact details: 'T 852 2563 8900 | E enquiries@hubbis.com | Disclaimer'.

You can access Learning Plans by clicking on the button as indicated below.

The screenshot shows the Hubbis Learning Management System interface. At the top right, it says "You are logged in as [username] (Logout)". The navigation bar includes "Home", "Courses", and "hubbis.com". The left sidebar contains "Site Administration" (Reports, Company admin, Team admin) and several icons: "Add/Edit My Learning", "Bookmarks", "Learning Plans" (circled in red), "What's New", "Help", and "Feedback". The main content area has a "Welcome" section with a message about the system and a paragraph about course content. Below this are four feature tiles: "Courses", "Profile & Reports", "Learning Plans" (highlighted with a yellow background), and "Glossary". Each tile has an "Open" button.

Company administrators can create custom-made Learning Plans for all staff - for an individual, a group, or team(s).

hubbis

You are logged in as [\[User Name\]](#) ([Logout](#))

Home Courses hubbis.com

Hubbis > Learning Plans

Site Administration

- Reports
- Company admin
- Team admin

Add/Edit My Learning

Bookmarks

Learning Plans

What's New

Help

Feedback

Learning Plans

Create custom-made learning plans for your staff - for an individual, a group, or team(s).

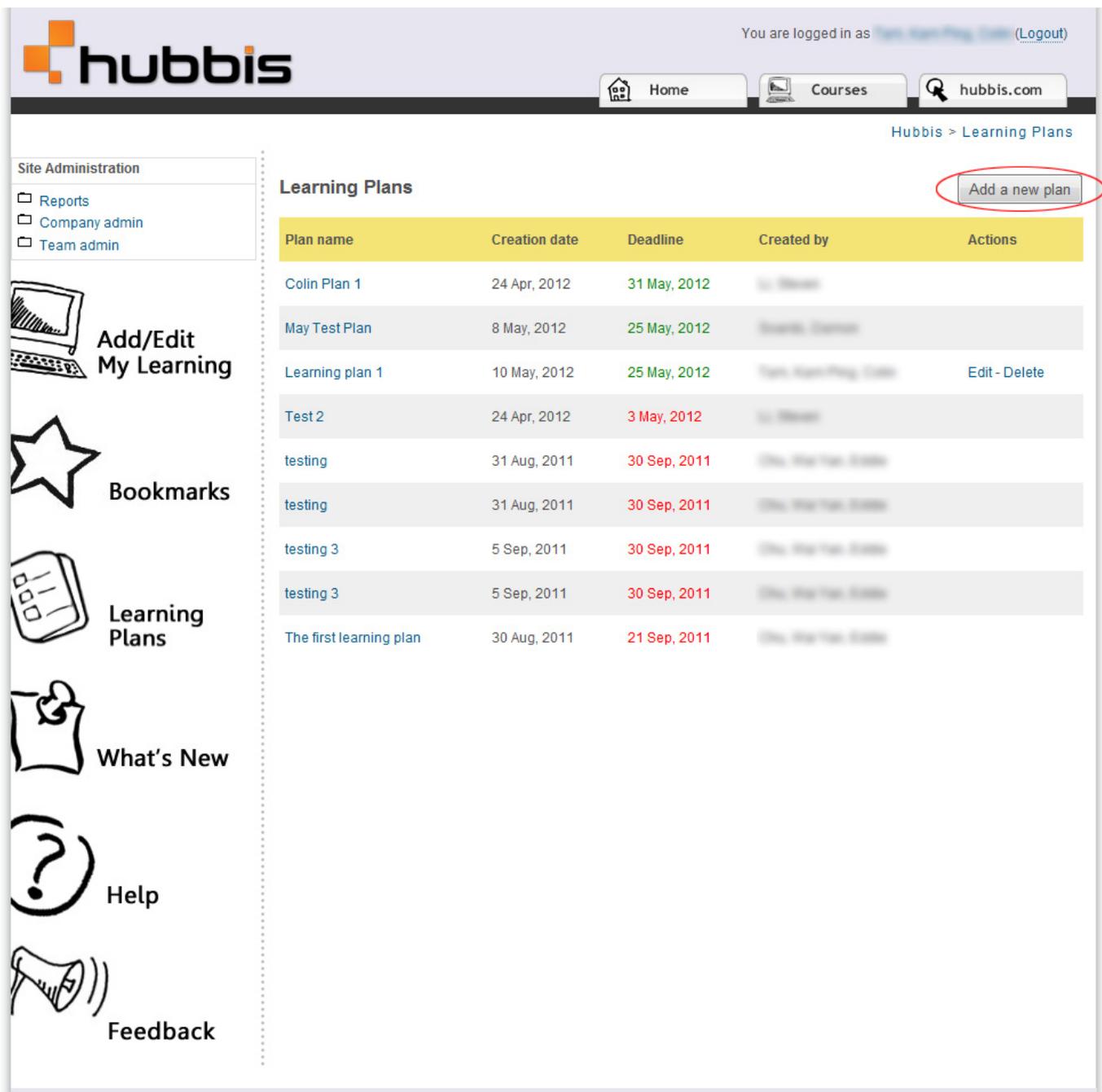
Follow the simple instructions on this page and the subsequent pages. First you can select which courses to include in the plan via a variety of search options depending on different criteria for your learners. Then review and confirm the selection - before naming the plan, deciding the deadline and choosing who to send it to.

You can set a date in advance of the deadline when the system will automatically send a reminder email to learners who still have courses to complete. Plus you will be able to send individuals or groups of learners bespoke emails at any time.

[» Click here to create / view / edit learning plans](#)

Company administrators can list all the Learning Plans they have created, or by the team managers in the company.

1. Click on the Plan name to view details
2. Edit this Learning Plan
3. Delete this Learning Plan
4. Add a new Plan



Site Administration

- ▣ Reports
- ▣ Company admin
- ▣ Team admin

Learning Plans Add a new plan

Plan name	Creation date	Deadline	Created by	Actions
Colin Plan 1	24 Apr, 2012	31 May, 2012	U. Mehta	
May Test Plan	8 May, 2012	25 May, 2012	Frankie Darnell	
Learning plan 1	10 May, 2012	25 May, 2012	Tom van Pelt, Colin	Edit - Delete
Test 2	24 Apr, 2012	3 May, 2012	U. Mehta	
testing	31 Aug, 2011	30 Sep, 2011	U. Mehta, Colin	
testing	31 Aug, 2011	30 Sep, 2011	U. Mehta, Colin	
testing 3	5 Sep, 2011	30 Sep, 2011	U. Mehta, Colin	
testing 3	5 Sep, 2011	30 Sep, 2011	U. Mehta, Colin	
The first learning plan	30 Aug, 2011	21 Sep, 2011	U. Mehta, Colin	

 Add/Edit My Learning
 Bookmarks
 Learning Plans
 What's New
 Help
 Feedback

Select the individual courses to include in the Plan via the search options below - and then click “Proceed to Step 2” after you have completed your selection. You can select more than one item in any drop-down menu.

1. Tick the checkbox to select individual courses - it will highlight the course, and also display it in the box “Selected courses” box on the top left for easy reference
2. Selected courses - review the courses chosen; click on the red “x” to remove courses from the list

hubbis You are logged in as [\[User Name\]](#) (Logout)

Home Courses hubbis.com

Hubbis > Learning plans

Add a new plan > Select courses (Step 1) [Back to learning plans](#) [Proceed to Step 2](#)

Select the individual courses to include in the plan via the search options below - and then click "Proceed to Step 2" after you have completed your selection. You can select more than one item in any drop-down menu - hold the CTRL key to select or deselect.

Select category: All categories
 Course level: All levels
 Course type: All types
 Job function: All job functions
 Topics: All topics
 Recent courses (last 3 months):

■ Learning modules ■ Continuous education tests 489 course(s) found.

Course name	Category	CPT minutes	Level	Date	
Building blocks of structured products 2012	Product Training	60 minutes	Beginner	10 Apr, 2012	<input type="checkbox"/>
Capital protected products 2012	Product Training	50 minutes	Beginner / Intermediate	3 Jan, 2012	<input checked="" type="checkbox"/>
Understanding ETFs 2012	Product Training	60 minutes	Beginner	3 Jan, 2012	<input type="checkbox"/>
Using ETFs 2012	Product Training	60 minutes	Beginner / Intermediate	3 Jan, 2012	<input type="checkbox"/>
AML - Malaysia 2012	Regulation and Compliance	30 minutes	All levels	13 Dec, 2011	<input checked="" type="checkbox"/>
AML - Singapore 2012	Regulation and Compliance	30 minutes	All levels	13 Dec, 2011	<input type="checkbox"/>
AML - Hong Kong 2012	Regulation and Compliance	30 minutes	All levels	7 May, 2012	<input checked="" type="checkbox"/>
AML - operations staff 2012	Regulation and Compliance	75 minutes	All levels	13 Dec, 2011	<input type="checkbox"/>
AML - management and compliance 2012	Regulation and Compliance	120 minutes	All levels	3 May, 2012	<input type="checkbox"/>
AML - frontline staff 2012	Regulation and Compliance	75 minutes	All levels	13 Dec, 2011	<input type="checkbox"/>
Front-office control frameworks	Regulation and Compliance	60 minutes	All levels	21 Jul, 2011	<input type="checkbox"/>
Guidelines on Fair Dealing - Singapore	Regulation and Compliance	40 minutes	All levels	21 Jul, 2011	<input type="checkbox"/>

Select users and add Plan details. Complete the Learning Plan by entering the details below - including who to allocate it to and the deadline. Click "Create a new learning plan" to complete the process.

1. Select or deselect to allocate users
2. Click on this icon to pick the Deadline and Reminder dates
3. Create your own certified programme from this learning plan – this will insert your institution's logo on the certificate

You are logged in as [\[User Name\]](#) (Logout)

Home Courses hubbis.com

Hubbis > Learning plans

Site Administration

- Reports
- Company admin
- Team admin

Add/Edit My Learning

Bookmarks

Learning Plans

What's New

Help

Feedback

Select users Back to Step 1

Complete the Learning plan by entering the details below – including who to allocate it to and the deadline. Click "Create a new learning plan" to complete the process.

Unselect user | Selected user

Plan details

Plan name:

Plan description:

Deadline: Choose a date

Reminder send before: Choose a date

Do you want to create your own certified programme from this learning plan?
This will insert your institution's logo on the certificate.

Selected courses

Learning modules Continuous education tests 3 course(s) found.

Course name	Category	CPT minutes	Level	Date
Capital protected products 2012	Product Training	50 minutes	---	3 Jan, 2012
AML - Malaysia 2012	Regulation and Compliance	30 minutes	---	13 Dec, 2011
AML - Hong Kong 2012	Regulation and Compliance	30 minutes	---	7 May, 2012

1. Tick the check-box
2. You can preview your certificate – this will be the company logo which you see at the top left of your LMS pages
3. You can upload a new logo if required

Learning Plans

What's New

Help

Feedback

Plan name

Plan description

Deadline Choose a date

Reminder send before Choose a date

Do you want to create your own certified programme from this learning plan?
This will insert your institution's logo on the certificate.

Title

Description

Company logo (JPG/PNG/GIF) Use default logo. **Preview your certificate - this will include the following logo.**

Or upload a new logo: **Browse...**

Create this Plan

Selected courses

Learning modules Continuous education tests 3 course(s) found.

Course name	Category	CPT minutes	Level	Date
<input type="checkbox"/> Capital protected products 2012	Product Training	50 minutes	---	3 Jan, 2012
<input type="checkbox"/> AML - Malaysia 2012	Regulation and Compliance	30 minutes	---	13 Dec, 2011
<input type="checkbox"/> AML - Hong Kong 2012	Regulation and Compliance	30 minutes	---	7 May, 2012

Copyright © 2012. Hubbis.com, Inc. All rights reserved.

Tick this box “Send notification to all selected users” to send an email to all selected users with the Plan details.

hubbis

You are logged in as [\[User Name\]](#) (Logout)

Home Courses hubbis.com

Hubbis > Learning Plans

Back to learning plans

Edit Learning Plan

Plan name: Learning plan 1

Plan description: Learning plan 1

Deadline: 25/05/2012

Reminder send before: 18/05/2012

Send notification to all selected users?

Created by: [User Name]

Do you want to create your own certified programme from this learning plan?
This will insert your institution's logo on the certificate.

Title: [Empty]

Description: [Empty]

Company logo (JPG/PNG/GIF): Use default logo:



hubbis

Or upload a new logo: Browse...

Update this plan

Change selected users.

The screenshot shows the Hubbis web interface for editing a learning plan. At the top, the Hubbis logo is on the left, and the user is logged in as 'User Name' with a '(Logout)' link. Navigation buttons for 'Home', 'Courses', and 'hubbis.com' are in the top right. The breadcrumb 'Hubbis > Learning Plans' is also present. A 'Back to learning plans' button is located in the top right corner of the main content area.

The main content area is titled 'Edit Learning Plan' and contains a sub-section 'Edit selected users'. This section features two lists: 'Unselect user' and 'Selected user'. The 'Unselect user' list contains 'Team 1'. The 'Selected user' list also contains 'Team 1'. Between these two lists are two buttons: '>>' and '<<'. These buttons are circled in red, indicating they are used to move users between the two lists. The '>>' button is used to move a user from the 'Unselect user' list to the 'Selected user' list, and the '<<' button is used to move a user from the 'Selected user' list back to the 'Unselect user' list.

On the left side of the interface, there is a sidebar with several sections: 'Selected courses' (listing 'Building blocks of structured products 2012' and 'Using ETFs 2012'), 'Site Administration' (with links for Reports, Company admin, and Team admin), and a vertical menu of icons for 'Add/Edit My Learning', 'Bookmarks', 'Learning Plans', 'What's New', and 'Help'.

Add / delete selected courses.

You are logged in as [\[User Name\]](#) (Logout)

Home
Courses
hubbis.com

[Hubbis > Learning Plans](#)

Selected courses

- Building blocks of structured products 2012 X
- Using ETFs 2012 X

Site Administration

- Reports
- Company admin
- Team admin

Add/Edit My Learning

Bookmarks

Learning Plans

What's New

Help

Edit Learning Plan Back to learning plans

Edit selected users

Edit selected courses

Select the individual courses to include in the plan via the search options below. You can select more than one item in any drop-down menu - hold the CTRL key to select or deselect.

Select category

Course level

Course type

Job function

Topics

Recent courses (last 3 months)

All categories

All levels

All types

All job functions

All topics

■ Learning modules ■ Continuous education tests 489 course(s) found.

Course name	Category	CPT minutes	Level	Date	
Building blocks of structured products 2012	Product Training	60 minutes	Beginner	10 Apr, 2012	<input checked="" type="checkbox"/>
Capital protected products 2012	Product Training	50 minutes	Beginner / Intermediate	3 Jan, 2012	<input type="checkbox"/>
Understanding ETFs 2012	Product Training	60 minutes	Beginner	3 Jan, 2012	<input type="checkbox"/>
Using ETFs 2012	Product Training	60 minutes	Beginner / Intermediate	3 Jan, 2012	<input checked="" type="checkbox"/>
AML - Malaysia 2012	Regulation and Compliance	30 minutes	All levels	13 Dec, 2011	<input type="checkbox"/>
AML - Singapore 2012	Regulation and Compliance	30 minutes	All levels	13 Dec, 2011	<input type="checkbox"/>
AML - Hong Kong 2012	Regulation and Compliance	30 minutes	All levels	7 May, 2012	<input type="checkbox"/>
AML - operations staff 2012	Regulation and Compliance	75 minutes	All levels	13 Dec, 2011	<input type="checkbox"/>
AML - management and compliance 2012	Regulation and Compliance	120 minutes	All levels	3 May, 2012	<input type="checkbox"/>
AML - frontline staff 2012	Regulation and Compliance	75 minutes	All levels	13 Dec, 2011	<input type="checkbox"/>
Front-office control frameworks	Regulation and Compliance	60 minutes	All levels	21 Jul, 2011	<input type="checkbox"/>

If you see the name and description of the certified programme (highlighted in blue) - this indicates that it is a certified course.

Hubbis > Learning Plans

Back to learning plans

Plan name	Learning plan 1
Plan description	Learning plan 1
Deadline	25 May, 2012
Created by	Test
Certified Programme - Title	This is a test programme
Certified Programme - Description	

Selected users

Selected courses

Learning plan status by users

View selected users.

The screenshot displays the Hubbis Learning Plans interface. At the top, the Hubbis logo is on the left, and the user is logged in as 'User Name' with a 'Logout' link. Navigation tabs for 'Home', 'Courses', and 'hubbis.com' are present. The breadcrumb trail shows 'Hubbis > Learning Plans'. A 'Back to learning plans' button is located in the top right of the main content area.

Site Administration

- Reports
- Company admin
- Team admin

Add/Edit My Learning

Bookmarks

Learning Plans

What's New

Help

Feedback

Learning plan details

Selected users

Selected courses

Learning plan status by users

See a summary of the selected courses.


You are logged in as [\[User Name\]](#) (Logout)

Home
 Courses
 hubbis.com

[Hubbis > Learning Plans](#)

Site Administration

- Reports
- Company admin
- Team admin

 **Add/Edit My Learning**

 **Bookmarks**

 **Learning Plans**

 **What's New**

 **Help**

 **Feedback**

Learning plan details

Selected users

Selected courses

■ Learning modules
 ■ Continuous education tests
 2 course(s) found.

Course name	Category	CPT minutes	Level	Date
Building blocks of structured products 2012	Product Training	60 minutes	---	10 Apr, 2012
Using ETFs 2012	Product Training	60 minutes	---	3 Jan, 2012

Learning plan status by users

View Learning Plan status - by individual users.

Click on the user list to see the status for each individual.

You are logged in as [\[User Name\]](#) (Logout)

Home Courses hubbis.com

Hubbis > Learning Plans

Back to learning plans

Site Administration

- Reports
- Company admin
- Team admin

Add/Edit My Learning

Bookmarks

Learning Plans

What's New

Help

Feedback

Learning plan details

Selected users

Selected courses

Learning plan status by users

Learning modules
 Continuous education tests

Course name	Category	CPT minutes	Level	Date	Status
Building blocks of structured products 2012	Product Training	60 minutes	---	10 Apr, 2012	---
Using ETFs 2012	Product Training	60 minutes	---	3 Jan, 2012	---

All users can see a list of all content which they previously bookmarked via www.hubbis.com.

In addition, under the heading “Action” in the table below, users can either remove bookmarks or can add items already bookmarked to an existing Learning Plan.

Site Administration

- Reports
- Company admin
- Team admin

Add/Edit My Learning

Bookmarks

Learning Plans

What's New

Help

Feedback

You are logged in as [\[User Name\]](#) (Logout)

Home Courses hubbis.com

Hubbis > Bookmarks

Bookmarks

On this page, you can see a list of all content which you previously bookmarked. In addition, under the heading "Action" in the table below, you can either remove bookmarks or you can add items already bookmarked to your existing learning plan.

Type of content: All types

Date bookmarked: 20 June 2010

10 May 2012

Keywords: [Search]

Bookmarked	Action	Type	Date
Creating a pool of skilled private bankers	⊗	Article	26 Mar, 2012
The growing trend of independent asset managers	⊗	Article	26 Mar, 2012
Building blocks of structured products 2012	⊗	Course	1 Mar, 2012
Becoming a trusted adviser	⊗	Course	1 Dec, 2011
Rishabh Saksena on tackling uncertainty	⊗	Course	11 Nov, 2011
The basics of derivatives	⊗	Course	25 Jul, 2011
private banking challenges	⊗	Video	30 Jun, 2011
Francine Fu on training	⊗	Course	20 Jun, 2011
Wealth management in Asia	⊗	Course	20 Jun, 2011
Why wealth management matters	⊗	Course	20 Jun, 2011

Copyright © 2012. Hubbis.com, Inc. All rights reserved.
T 852 2563 8900 | E enquiries@hubbis.com | [Disclaimer](#)

You can tailor this platform to meet the specific training needs of your organisation and individual users.

This page gives you the ability to log all training your staff do - including classroom / face-to-face training, seminars, workshops or conferences. This is added to each user's training log and will appear on their certificate. Either you can add the details of face-to-face training on behalf of your staff. Or you can review, edit or delete details of face-to-face training which your staff have submitted for your approval.

You also have the option to upload your own e-learning modules. And enable / disable existing courses, or delete them. In addition, you can create new face-to-face training courses for your staff, and enroll them on these.

hubbis

You are logged in as [User Name \(Logout\)](#)

Home Courses hubbis.com

Hubbis > Add / Edit My Learning

Site Administration

- Reports
- Company admin
- Team admin

Add/Edit My Learning

By clicking on the links below, you can tailor this platform to meet the specific training needs of your organisation and individual users.

This gives you the ability to log all training your staff do - including classroom / face-to-face training, seminars, workshops or conferences. This is added to each user's training log and will appear on their certificate.

Either you can add the details of face-to-face training on behalf of your staff. Or you can review, edit or delete details of face-to-face training which your staff have submitted for your approval.

You also have the option to upload your own e-learning modules. And enable / disable existing courses, or delete them.

In addition, you can create new face-to-face training courses for your staff, and enroll them on these.

- » [Click here to add / edit My Learning](#)
- » [Click here to approve / edit Face-to-Face Training submitted by my staff](#)
- » [Click here to view previously-approved Face-to-Face Training for my staff](#)
- » [Click here to submit Face-to-Face Training on behalf of my staff which they have already completed](#)
- » [Click here to create new Face-to-Face Training courses and enroll my staff](#)

Bookmarks

Learning Plans

What's New

Help

Feedback

You can add your own e-learning courses. You can also search for your existing e-learning modules which you have already uploaded, and enable / disable existing courses, or delete them.

hubbis

You are logged in as [\[User Name\]](#) (Logout)

Home Courses hubbis.com

Hubbis > Courses

Site Administration

- Reports
- Company admin
- Team admin

Add/Edit My Learning

Bookmarks

Learning Plans

What's New

Help

Feedback

Courses

Add Company Courses:

[Add new Learning modules](#)

On this page, you can enable / disable courses for your learners.

Search [Click to show search fields](#)

Course categories

OR open a category page here

- Fundamentals of Wealth Management
- Acquisition and Retention of Clients
- Regulation and Compliance
- Asset Classes and Investment Styles
- Product Training
- Planning Toolkit
- Constructing Portfolios
- Estate Planning and Wealth Transfer
- Understanding Investor Behaviour
- Business Strategy
- Market Updates and Analysis
- EFG HK E-Learning
- China

hubbis

Copyright © 2012. Hubbis.com, Inc. All rights reserved.
T 852 2563 8900 | E enquiries@hubbis.com | [Disclaimer](#)

Add / update your own e-learning courses by following the instructions.


You are logged in as [\[User Name\]](#) (Logout)

Home
Courses
hubbis.com

[Hubbis](#) > [Courses](#) > [E-Learning](#) > [SCORMs/AICCs](#) > Editing SCORM/AICC

Adding a new SCORM/AICC to Scorm topics section 1 ?

On this page you can upload your own e-learning course - but they must be SCORM/AICC compliant.
 You need to enter various details in the fields below.
 Mandatory fields are marked with *

General

Name / title of training*

Summary - You need to enter a short description of what the course covers.*

Package file* ?

PDF outline

CPT minutes*

Other settings - You have the option to tag the course according to the fields below.

Linked Article

Linked Video

Skills / Knowledge % / %

Level Beginner
 Intermediate
 Advanced

Job function Investment & Product specialist
 Sales and marketing
 Management
 Operations
 Compliance

Topics Asset Allocation
 Behavioural Finance
 Business Strategy / Management
 Commodities

You are logged in as [\[User Name\]](#) ([Logout](#))

[Home](#) | [Courses](#) | [hubbis.com](#)

[Update this SCORM/AICC](#)
Hubbis > Courses > [E-Learning](#) > [SCORMs/AICCs](#) > [Part A - Options Basics](#)

Part A - Options Basics

Options Basics

[Start](#)

Copyright © 2012. Hubbis.com, Inc. All rights reserved.
T 852 2563 8900 | E enquiries@hubbis.com | [Disclaimer](#)

You are logged in as [\[User Name\]](#) ([Logout](#))

[Home](#) | [Courses](#) | [hubbis.com](#)

[Hubbis > Courses > \[E-Learning\]\(#\) > \[SCORMs/AICCs\]\(#\) > \[Part A - Options Basics\]\(#\) > \[Editing SCORM/AICC\]\(#\)](#)

[Settings](#)

Updating SCORM/AICC in Scorm topics section 1 ?

On this page you can upload your own e-learning course - but they must be SCORM/AICC compliant.
You need to enter various details in the fields below.
Mandatory fields are marked with *.

General

Name / title of training*

Summary - You need to enter a short description of what the course covers.*

Package file* ?

PDF outline

CPT minutes*

Other settings - You have the option to tag the course according to the fields below.

Linked Article

Linked Video

Skills / Knowledge % / %

You can approve, view, edit or delete any training your staff have submitted to be added to their training log. You can also contact individual users directly if you require more information or supporting documentation.


You are logged in as [\[User Name\]](#) ([Logout](#))

Home
 Courses
 hubbis.com

[Hubbis > Face-to-Face Training](#)

Site Administration

- Reports
- Company admin
- Team admin

Add/Edit My Learning

Bookmarks

Learning Plans

What's New

Help

Feedback

Training Awaiting Approval

On this page, you can approve, view, edit or delete any training your staff have submitted to be added to their training log. You can also contact individual users directly if you require more information or supporting documentation.

After approval, the information will move to [this page](#).

Team	First Name	Surname	Name of training	Date of training	Date submitted
Team 1	[Redacted]	[Redacted]	testing msg function	20 Oct, 2011	7 Oct, 2011
			<input type="button" value="Approve"/> <input type="button" value="View/Edit"/> <input type="button" value="Delete"/> <input type="button" value="Contact User"/>		
Team 1	[Redacted]	[Redacted]	1234567890	23 Mar, 2011	1 Jun, 2011
			<input type="button" value="Approve"/> <input type="button" value="View/Edit"/> <input type="button" value="Delete"/> <input type="button" value="Contact User"/>		
Team 1	[Redacted]	[Redacted]	test 2	29 Jan, 2010	1 Jun, 2011
			<input type="button" value="Approve"/> <input type="button" value="View/Edit"/> <input type="button" value="Delete"/> <input type="button" value="Contact User"/>		
Team 1	[Redacted]	[Redacted]	iiii	17 May, 2012	8 May, 2012
			<input type="button" value="Approve"/> <input type="button" value="View/Edit"/> <input type="button" value="Delete"/> <input type="button" value="Contact User"/>		



Copyright © 2012. Hubbis.com, Inc. All rights reserved.

T 852 2563 8900 | E enquiries@hubbis.com | [Disclaimer](#)

You can review all training you have already approved for your staff. You can also view / edit or delete training already approved. Or you can move the record back to this page for your staff to update by clicking the "Unapprove" button.


You are logged in as [\[User Name\]](#) (Logout)

Home
 Courses
 hubbis.com

[Hubbis > Non-Hubbis Training](#)

Site Administration

- Reports
- Company admin
- Team admin

Add/Edit My Learning

Bookmarks

Learning Plans

What's New

Help

Feedback

Approved Training

On this page, you can review all training you have already approved for your staff. You can also view / edit or delete training already approved. Or you can move the record back to [this page](#) for your staff to update by clicking the "Unapprove" button.

From: To: All users

Team	First Name	Surname	Name of training	Date Submitted	Date approved
Team 1	[Redacted]	[Redacted]	Icecream Workshop	2012/05/08	2012/05/08
			<input type="button" value="View/Edit"/> <input type="button" value="Delete"/> <input type="button" value="Unapprove"/>		
Team 1	[Redacted]	[Redacted]	testing msg function	2011/10/07	2012/05/09
			<input type="button" value="View/Edit"/> <input type="button" value="Delete"/> <input type="button" value="Unapprove"/>		
Team 1	[Redacted]	[Redacted]	testing msg function	2011/10/07	2012/05/08
			<input type="button" value="View/Edit"/> <input type="button" value="Delete"/> <input type="button" value="Unapprove"/>		
Team 1	[Redacted]	[Redacted]	New testing name of training	2011/06/01	2011/06/01
			<input type="button" value="View/Edit"/> <input type="button" value="Delete"/> <input type="button" value="Unapprove"/>		



Copyright © 2012. Hubbis.com, Inc. All rights reserved.

T 852 2563 8900 | E enquiries@hubbis.com | [Disclaimer](#)

You can enter the details of face-to-face training that your staff have already completed. This will then be added to their training log. You can also review training you have previously added.

You are logged in as [User Name \(Logout\)](#)

Home
 Courses
 hubbis.com

[Hubbis > Completed Face-to-Face Training](#)

Site Administration

- Reports
- Company admin
- Team admin

Add/Edit My Learning

Bookmarks

Learning Plans

What's New

Help

Feedback

Completed Face-to-Face Training

On this page, you can enter the details of face-to-face training that your staff have already completed. This will then be added to their training log.

At the bottom of the page, you can review training you have previously added.

Add new Face-to-Face Training

Type of training ---

Name / title of training

Date of training

Subject / topics covered

Length of training (CPT minutes / credits)

Description

Skills / Knowledge percentage % / %

Upload supporting document Browse...

Select users

Submit
Cancel

Training I added for my staff

Name of training	Date Submitted	Date of Training	CPT		
test	2012/05/09	2012/05/10	13 minutes	View/Edit	Delete
test4	2011/11/30	2011/11/24	55 minutes	View/Edit	Delete
test3	2011/11/30	2011/11/20	23 minutes	View/Edit	Delete

You can create a new face-to-face training course for your staff. And you can review all the training sessions you have already created.


You are logged in as [User Name](#) (Logout)

Home
 Courses
 hubbis.com

[Hubbis > Enroll on Face-to-Face Training](#)

Site Administration

- Reports
- Company admin
- Team admin

Add/Edit My Learning

Bookmarks

Learning Plans

What's New

Help

Feedback

Enroll on Face-to-Face Training

On this page, you can either create a new face-to-face course for your staff by clicking "Add Face-to-Face Training". And you can review in the table below all the training sessions you have already created - either as a summary or individually by clicking on the name of the training course. This will take you to a page with more details, and where you can accept or decline staff.

[Add Face-to-Face Training](#)

Name of training	Date of training	Date submitted	Action
final test	28 Jul, 2011	11 Jul, 2011	User list - Edit - Delete
Test	2 Sep, 2011	31 Aug, 2011	User list - Edit - Delete
Why People Fail - Reading	31 May, 2012	9 May, 2012	User list - Edit - Delete



Copyright © 2012. Hubbis.com, Inc. All rights reserved.

T 852 2563 8900 | E enquiries@hubbis.com | [Disclaimer](#)

You can view a summary of individual courses you have created, as well as the list of users, including whether they have accepted / declined, or are unconfirmed. You can accept / decline on behalf of users. And you can download the latest user list.

You are logged in as [John Smith](#) (Logout)

Home
Courses
hubbis.com

[Hubbis > Enroll on Face-to-Face Training](#)

Site Administration

- Reports
- Company admin
- Team admin

Add/Edit My Learning

Bookmarks

Learning Plans

What's New

Help

Feedback

Enroll on Face-to-Face Training Details Back

Name / title of training	Why People Fail - Reading
Type of training	Internal
Subject / topics covered	Why People Fail - PDF
Length of training (CPT minutes / credits)	10 minutes
Description	<p>As discussed with Michael, it is expected of you to read the book Why People Fail by the end of this month.</p> <p>The PDF of the book can be accessed via Carmen T in the case you have not received it already.</p> <p>Enjoy.</p>
Date of training	31 May, 2012
Skills / Knowledge percentage	0% / 0%

User list

All status

#	Name	Status	Action
1	Carmen T	Waiting	Accept - Decline
2	Carmen Lopez	Waiting	Accept - Decline
3	John Smith	Waiting	Accept - Decline
4	John Doe	Waiting	Accept - Decline
5	John Doe	Accepted	Accept - Decline
6	John Doe	Waiting	Accept - Decline
7	John Doe	Waiting	Accept - Decline
8	John Doe	Accepted	Accept - Decline
9	John Doe	Waiting	Accept - Decline
10	John Doe	Waiting	Accept - Decline
11	John Doe	Waiting	Accept - Decline

You can add a new face-to-face training course, and enroll your staff by selecting users either by individuals or teams. Your staff will then receive an email with all details and inviting them to accept.

hubbis

You are logged in as [\[User Name\]](#) (Logout)

Home Courses hubbis.com

Hubbis > Enroll on Face-to-Face Training

Enroll on Face-to-Face Training Back

On this page, you can create a new face-to-face training course for your staff. It will then send them an invitation email for them to accept / decline.

Type of training: ---

Name / title of training: _____

Date of training: Please choose a date. [calendar icon]

Reminder: Please choose a date. [calendar icon]

Subject / topics covered: _____

Length of training (CPT minutes / credits): _____

Description: _____

Skills / Knowledge percentage: _____ % / _____ %

Upload supporting document: _____ Browse...

Select users: Please select

Submit Cancel

Site Administration

- Reports
- Company admin
- Team admin

Add/Edit My Learning

Bookmarks

Learning Plans

What's New

Help

Feedback

hubbis

Copyright © 2012. Hubbis.com, Inc. All rights reserved.
T 852 2563 8900 | E enquiries@hubbis.com | [Disclaimer](#)

You can see recent updates we have made to the LMS on this page.

hubbis

You are logged in as [\[User Name\]](#) (Logout)

Home Courses hubbis.com

Hubbis > What's New

Site Administration

- Reports
- Company admin
- Team admin

Add/Edit My Learning

Bookmarks

Learning Plans

What's New

Help

Feedback

What's New

Click on each of the dates below to view the updates and enhancements we have made to the training platform - both in terms of the functionality and content.

» **July 2011**

We have continued to add new functionality and content to our training platform. These developments include courses on products and compliance, as well as features relating to enrolling on face-to-face training courses, creating customised programmes and certificates for your organisation, and enabling more searchability in relation to training records. » [read more](#)

» **June 2011**

We have added several new sections to customise our learning platform to your individual needs. This includes: enabling you to use the system as part of your entire training and talent development record; making it easier and quicker for you to find relevant training courses and other content; setting customised learning plans for you; and helping you to bookmark training you would like to do later. » [read more](#)

hubbis

Copyright © 2012. Hubbis.com, Inc. All rights reserved.
T 852 2563 8900 | E enquiries@hubbis.com | [Disclaimer](#)