Learning Management System
User Guide - Team Managers

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Contents

Introduction

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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-lone 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

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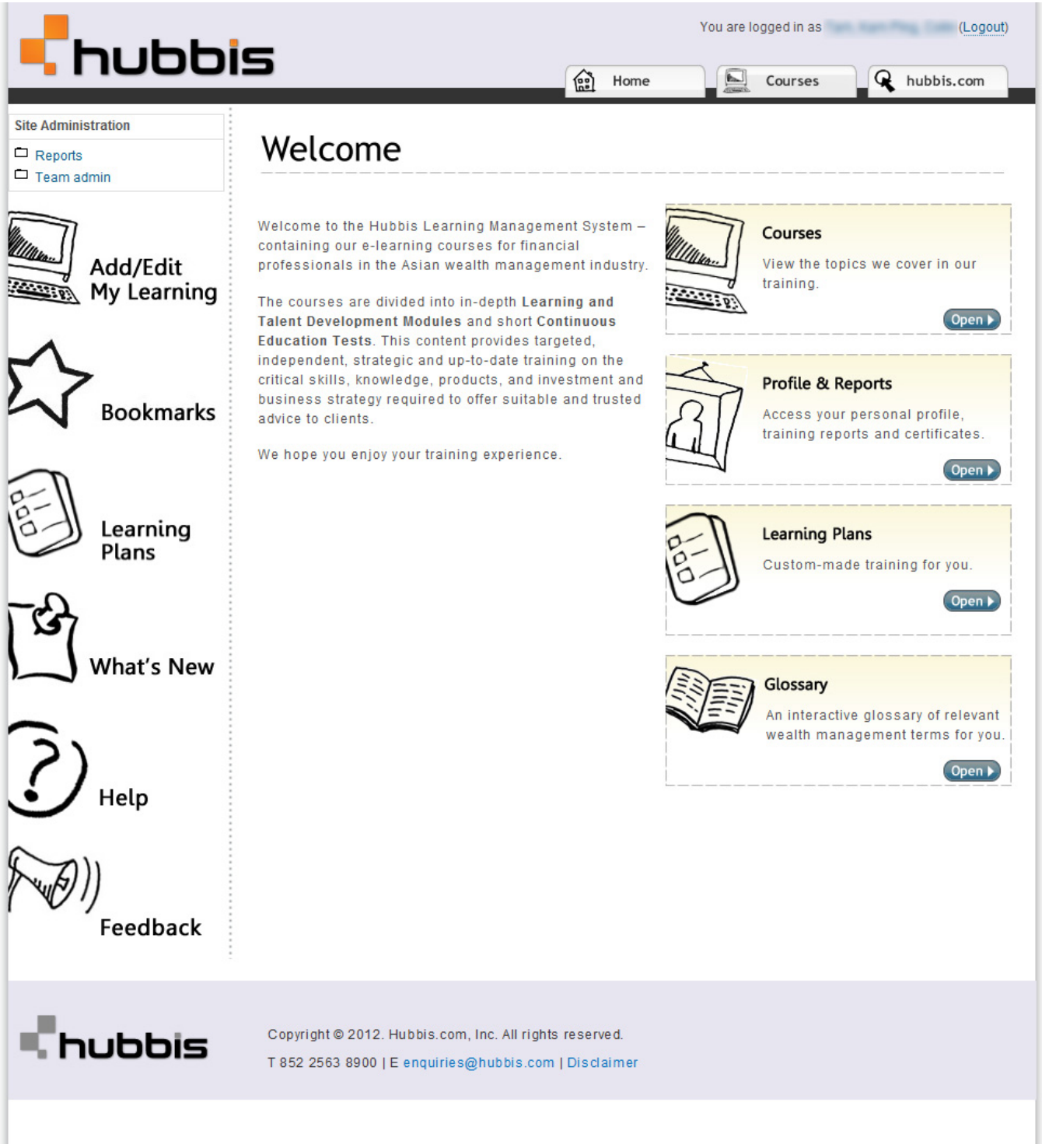
LMS homepage

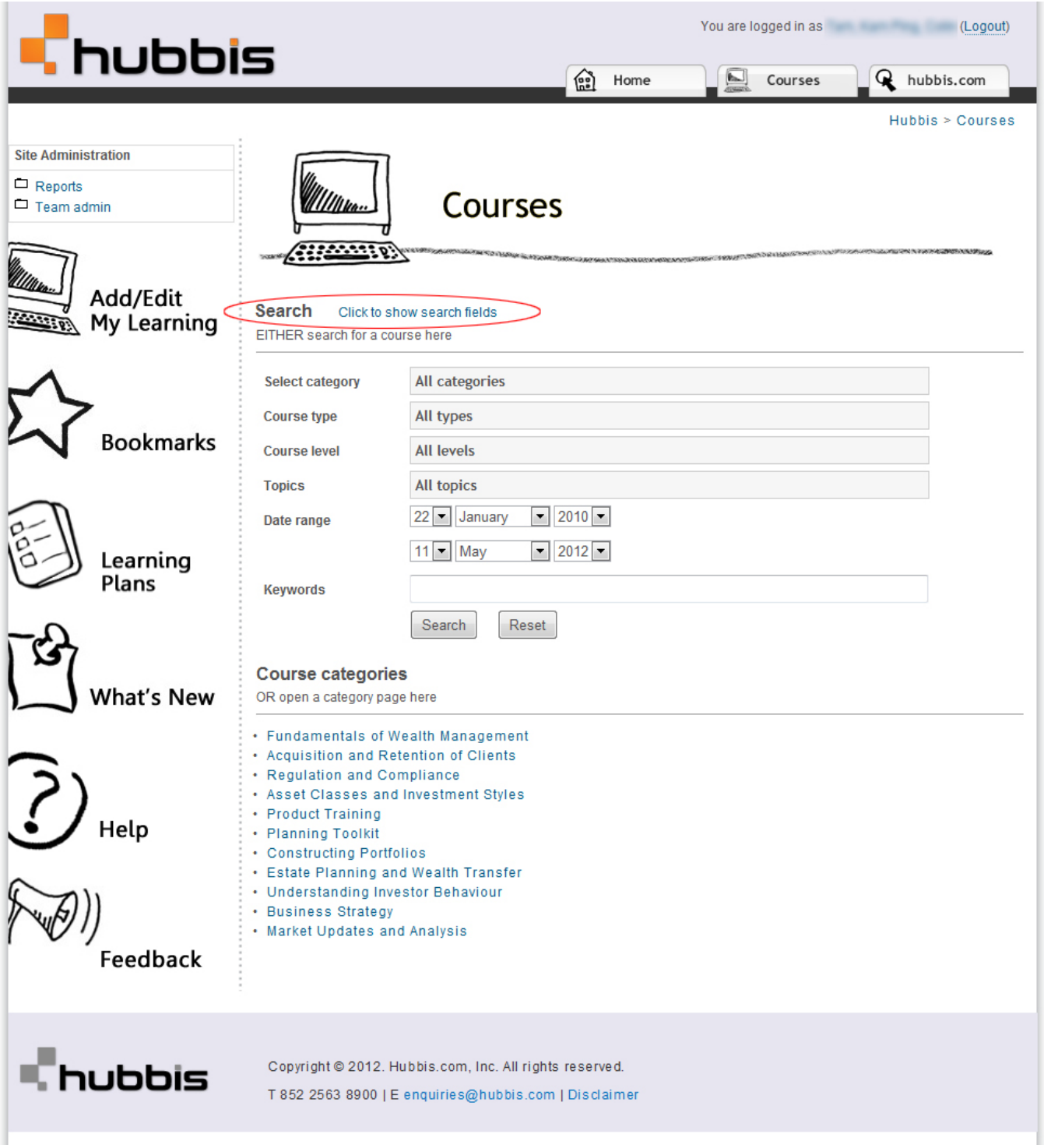


Main courses page

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.



Inside an individual topic / category page

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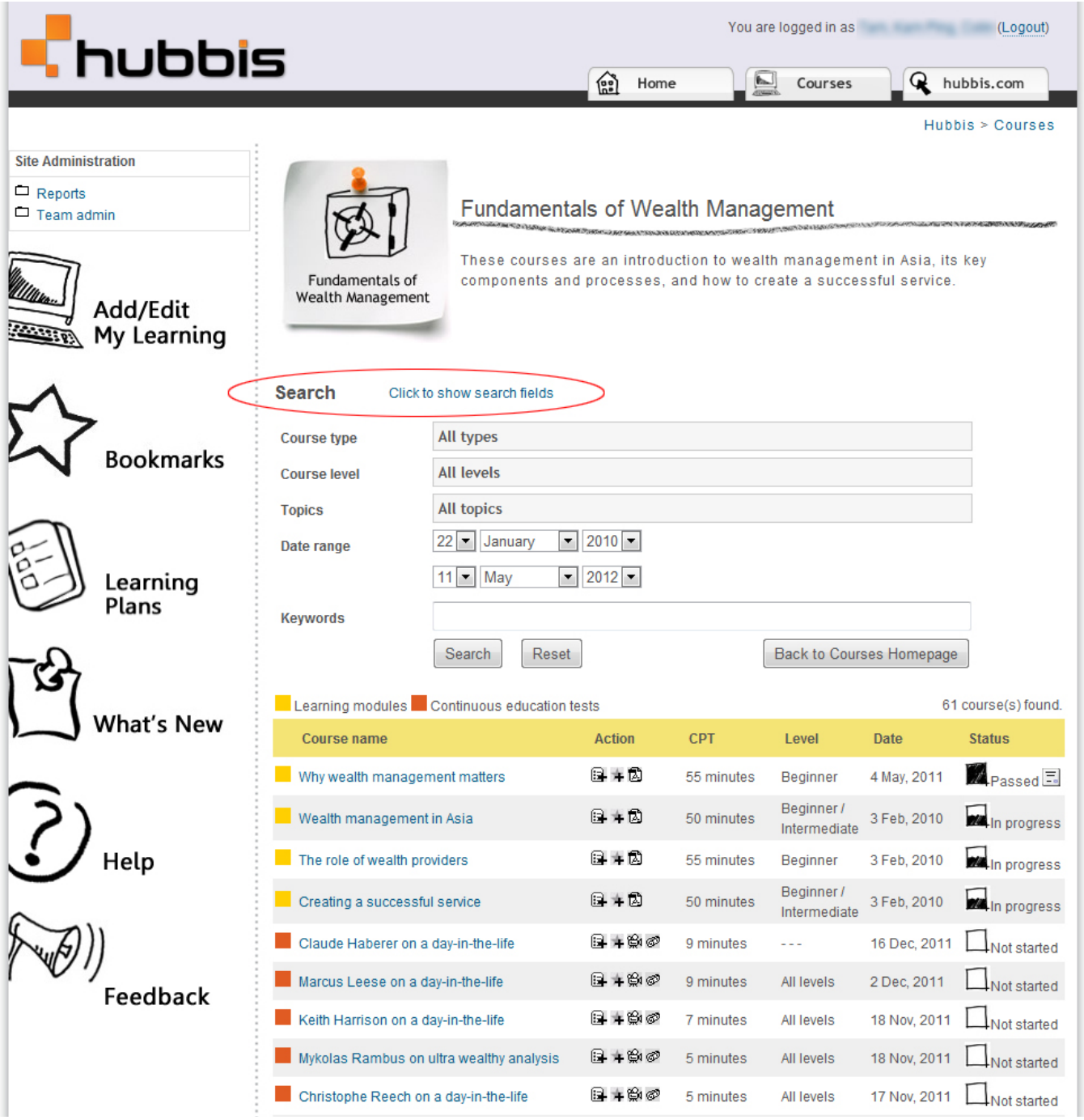
This category homepage shows the *Learning and Talent Development Modules* in yellow, and the *Continuous Education Tests* in orange.

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



Certificate

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.

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Certificate

Certificate ID: 1340681731

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

This is to certify that

Crooke, Andrew

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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%

Mark Wightman on common com	
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

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

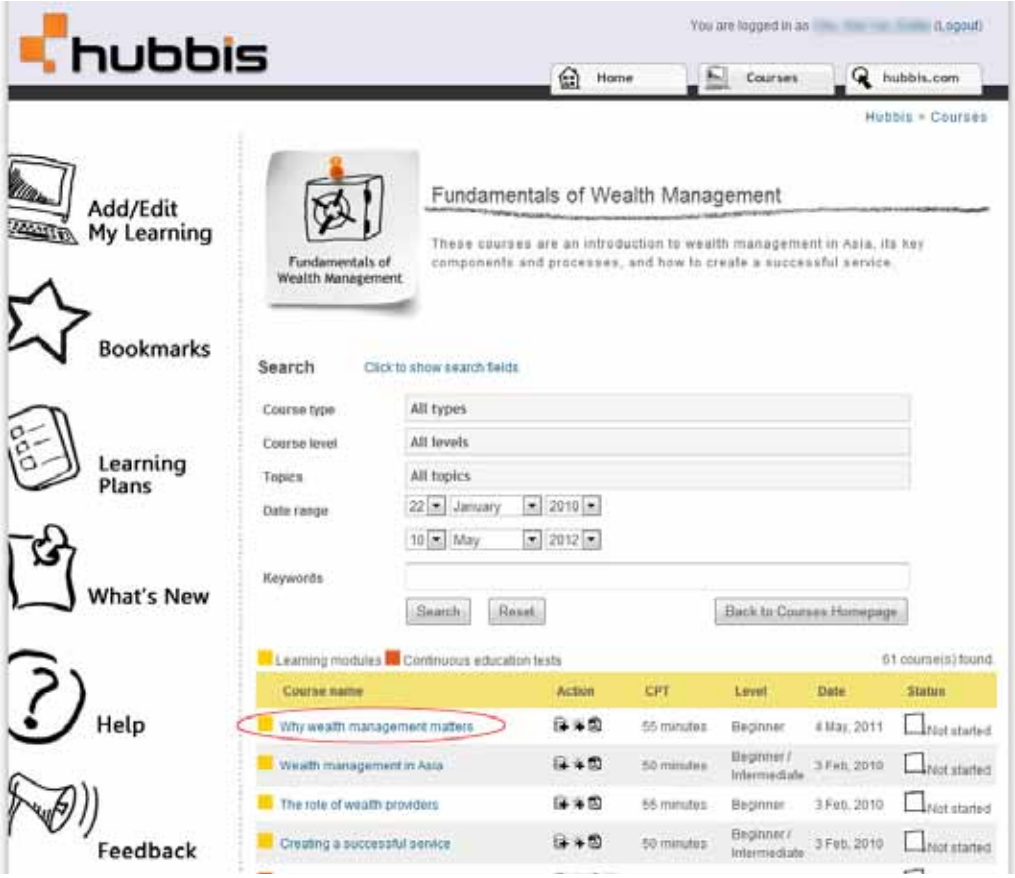
Skills: 50% (24 minutes)
Knowledge: 50% (24 minutes)

Total: 48 minutes

Andrew Crooke
Editor
Hubbis

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*.



Step 2

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

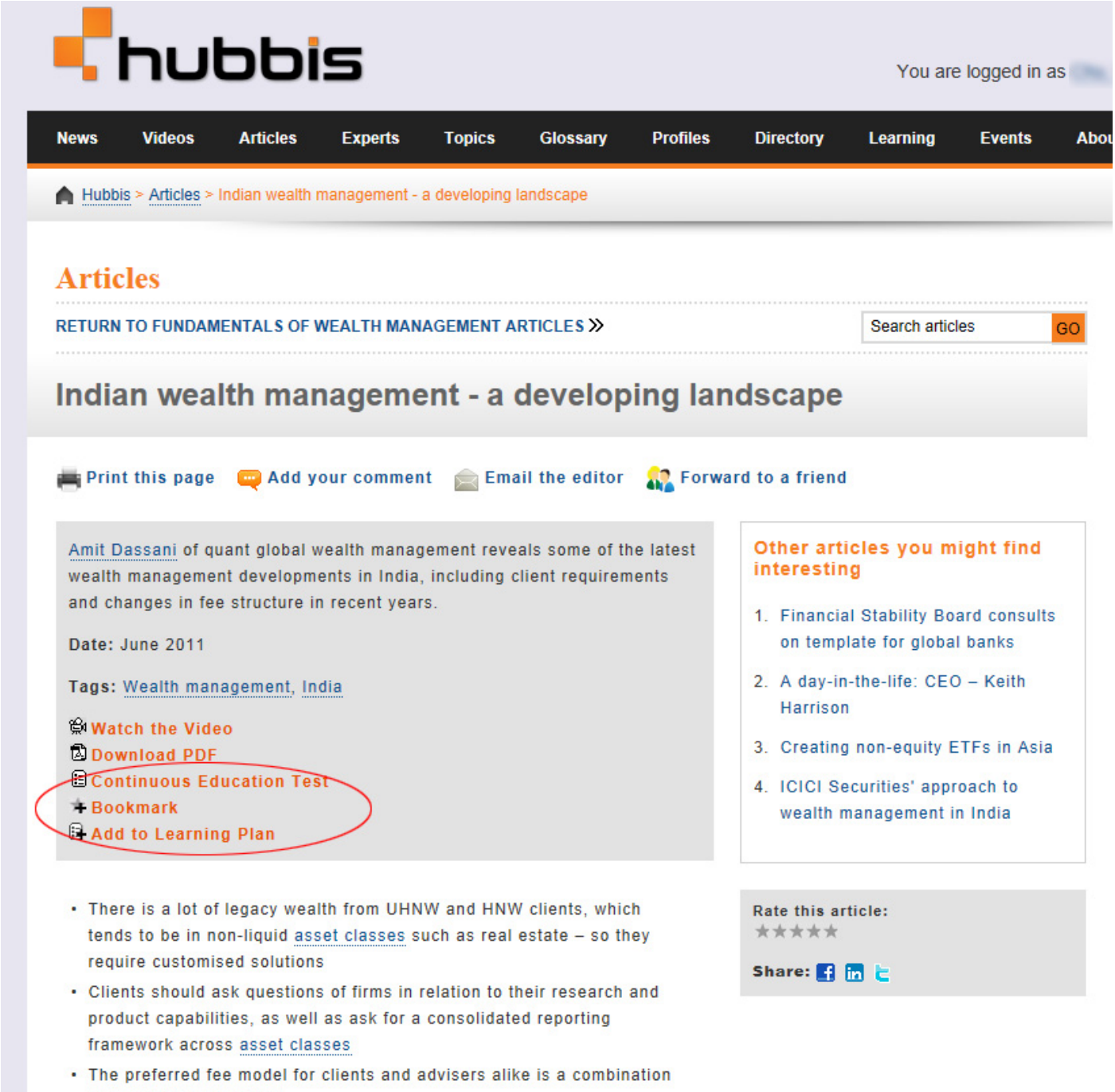
Step 3

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

Inside a course

Tests on the website content

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 beable to log it as part of their CPD. Or users can add this test to either their Bookmarks or Learning Plan.

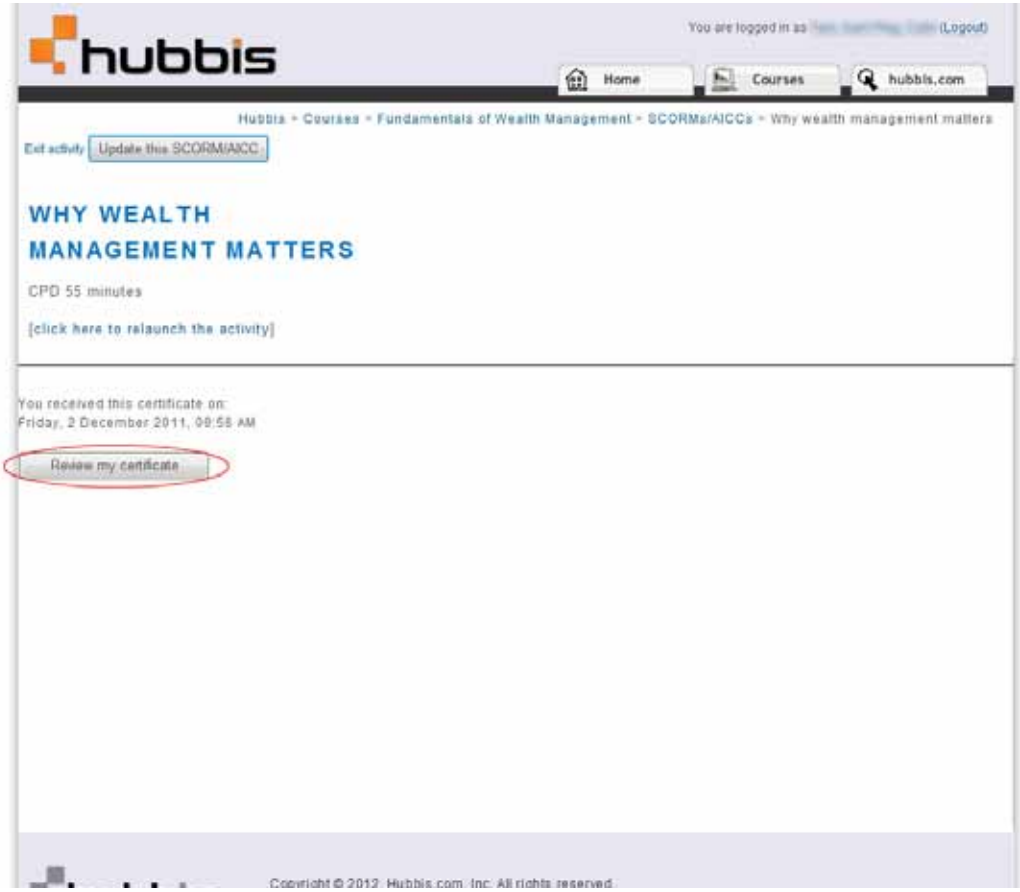


Get a certificate

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

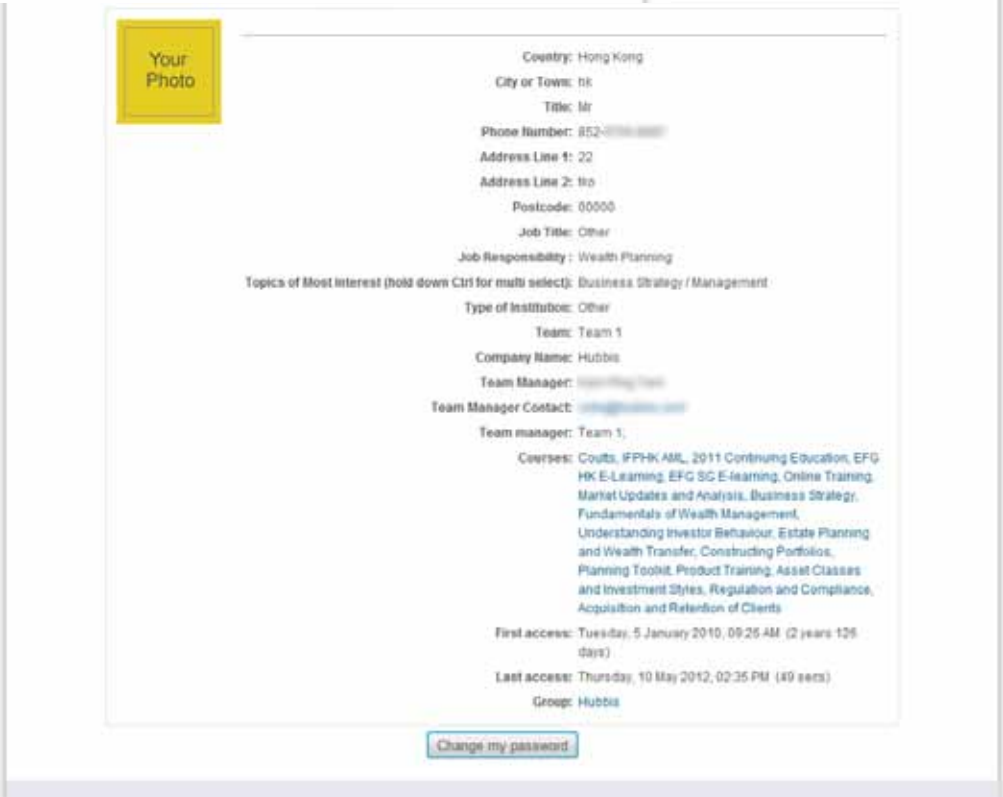
Users can retake a course at any time until they pass it - they simply go back to that individual course, click on the link and follow the instructions.

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



User profile

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.

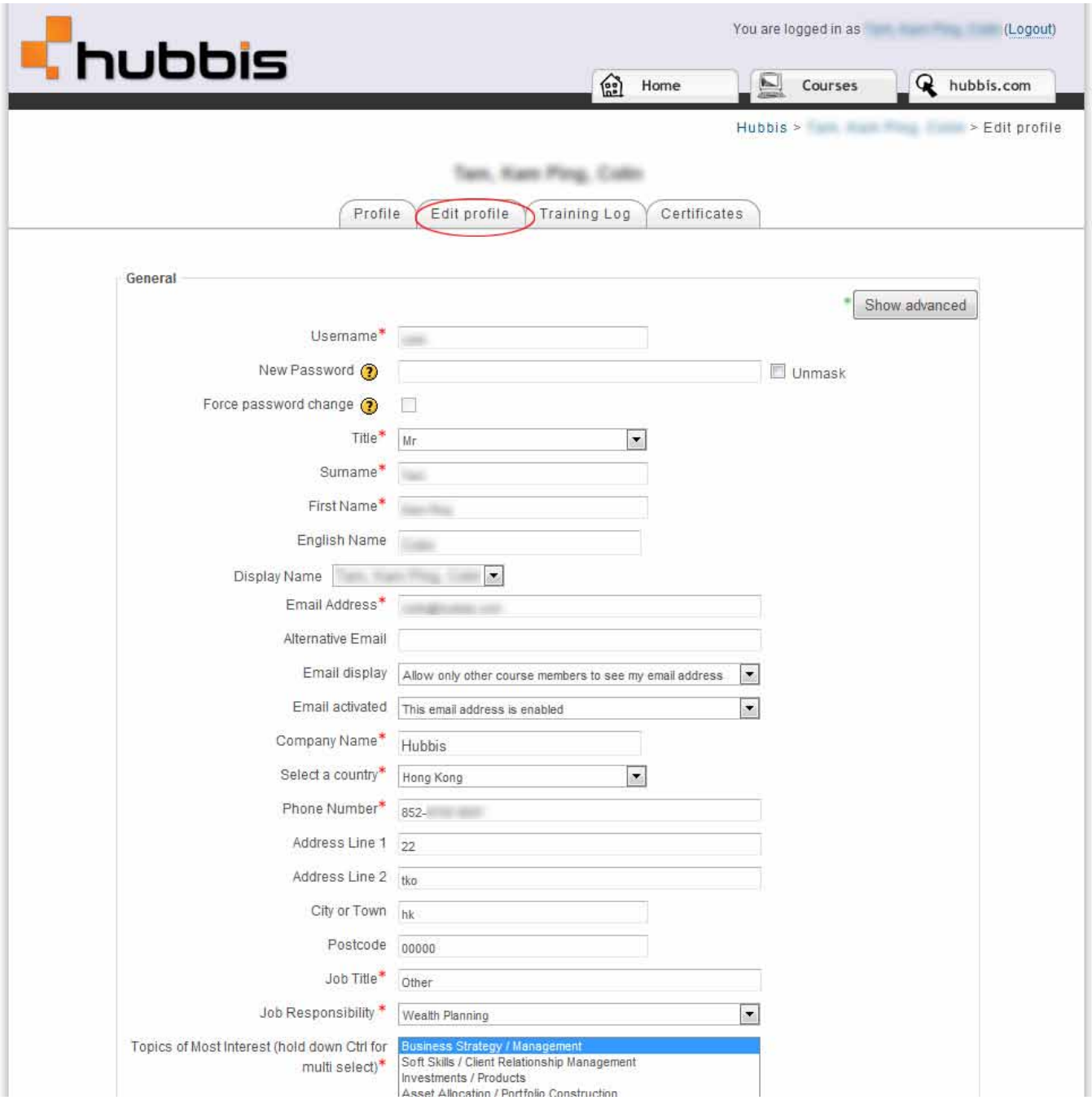


Edit profile

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.



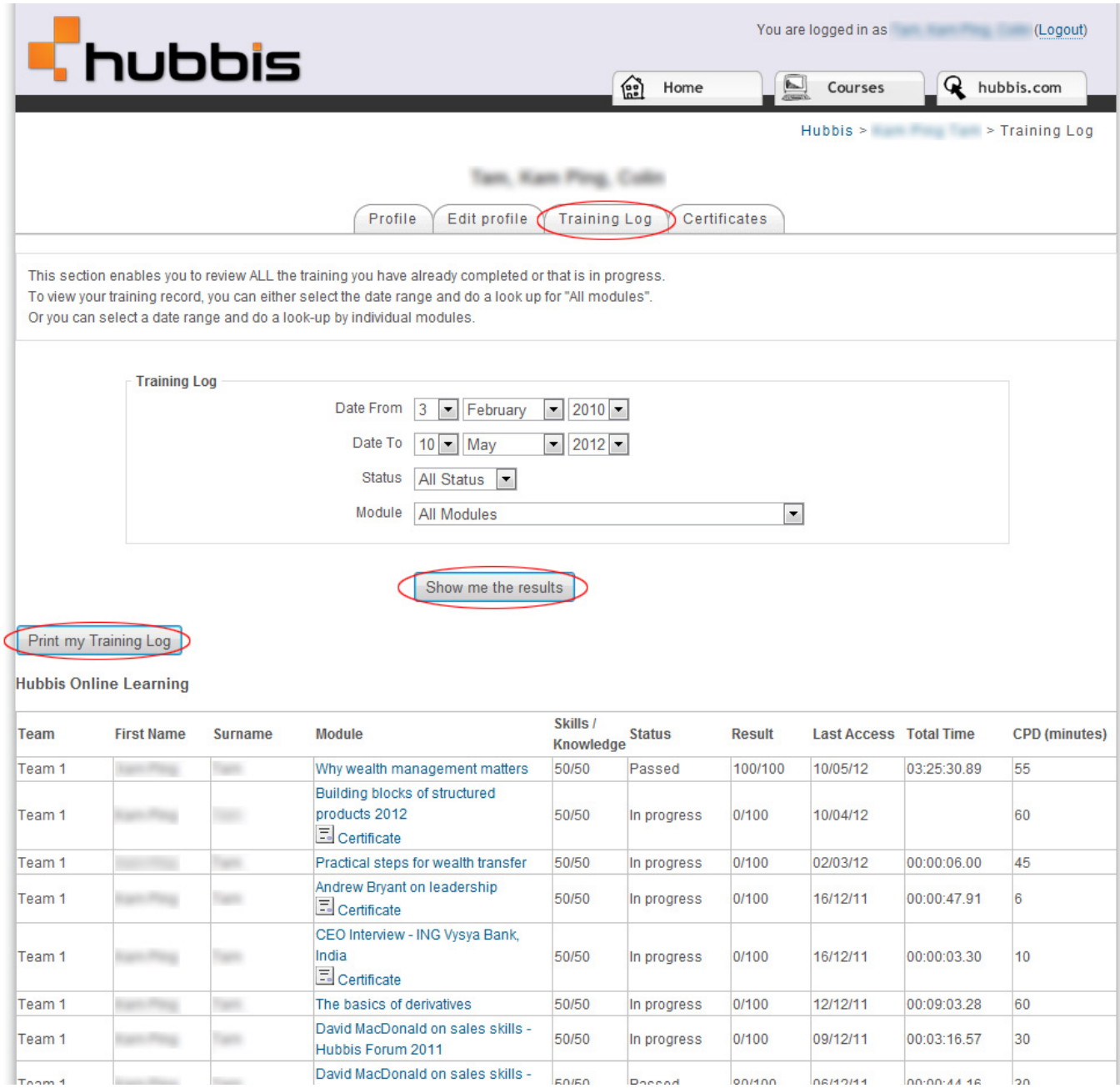
Training log

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



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	80/100	06/12/11	00:00:44.16	30

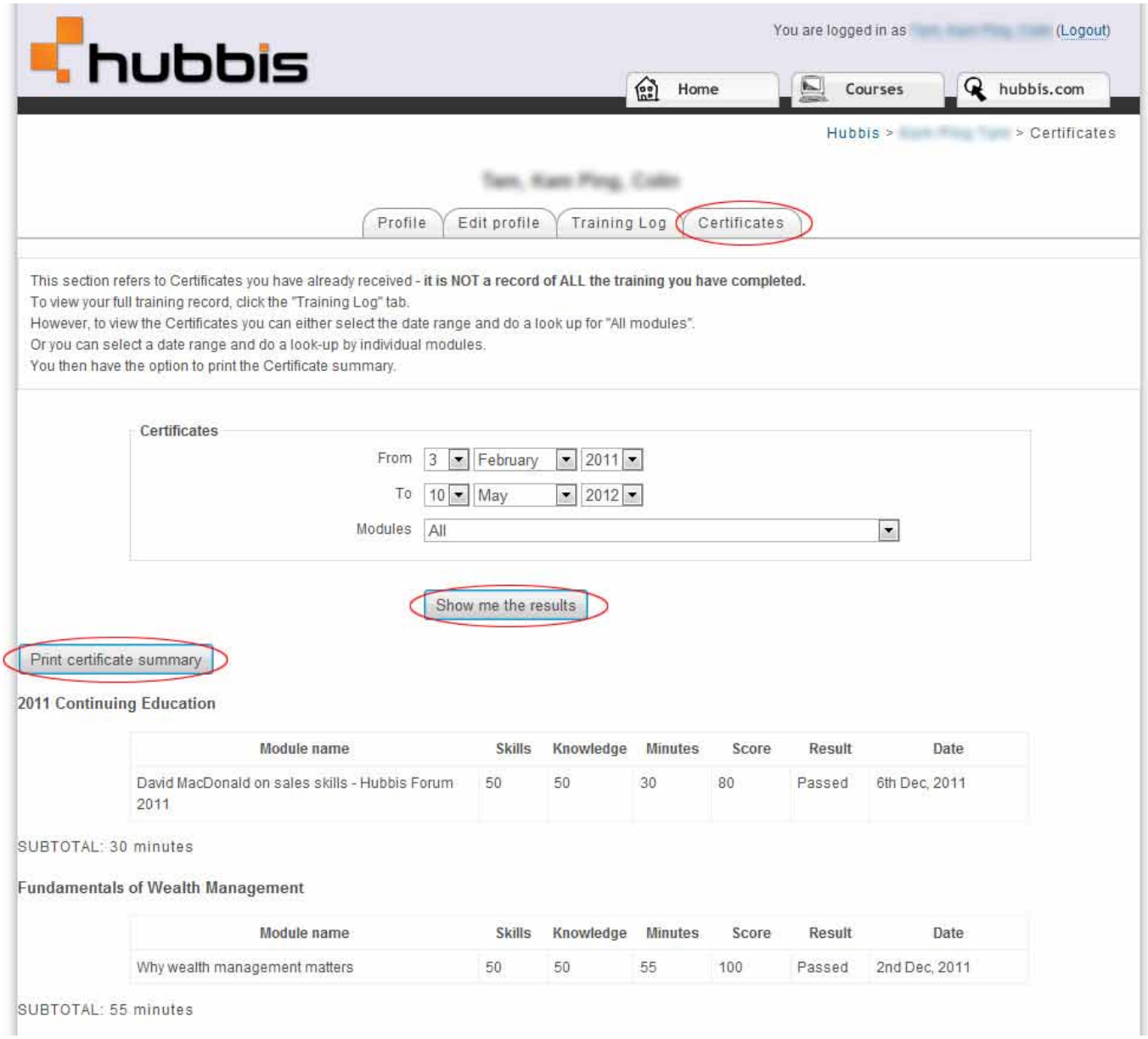
Certificates

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.

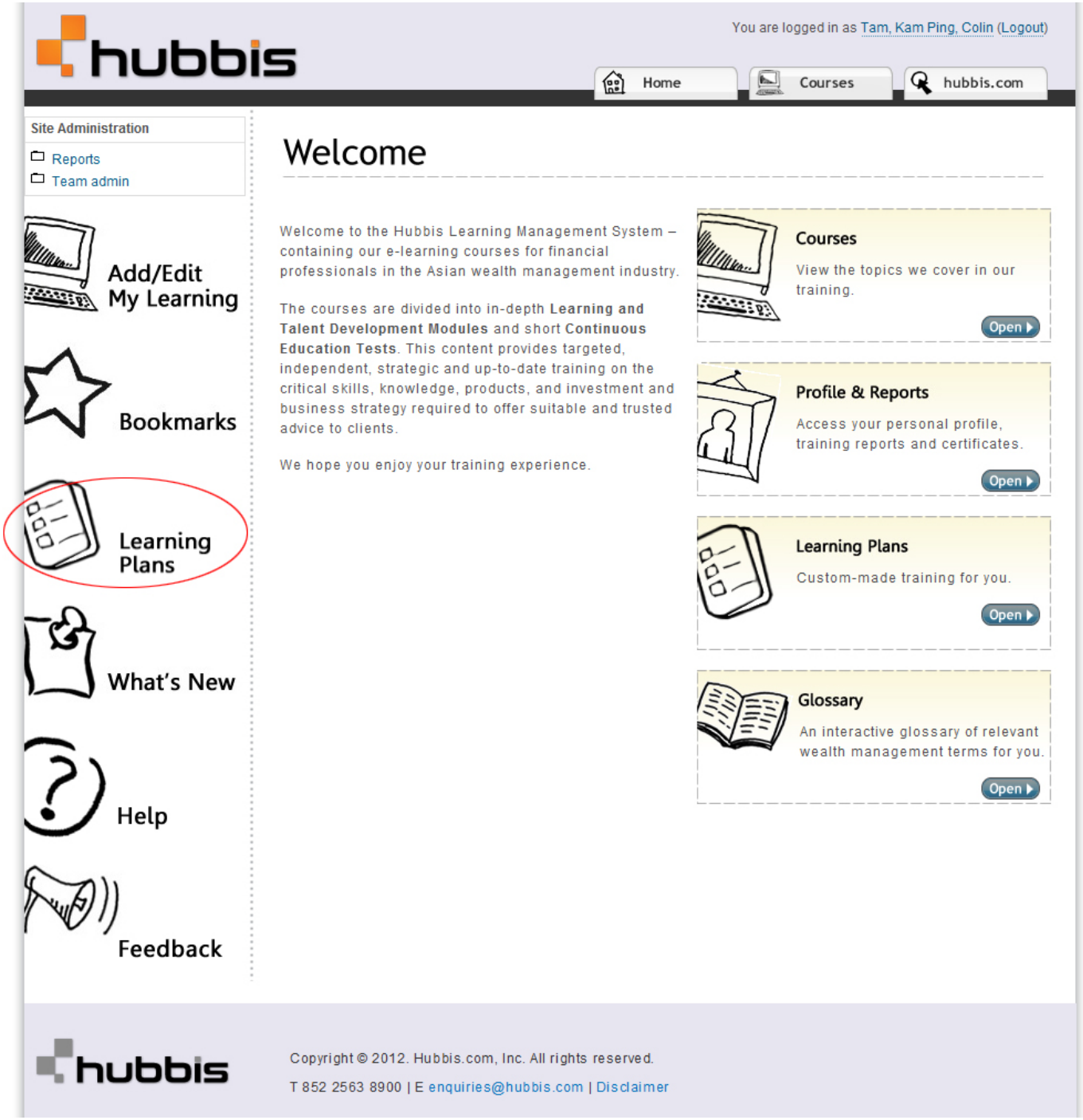
To do this - on the profile page:

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

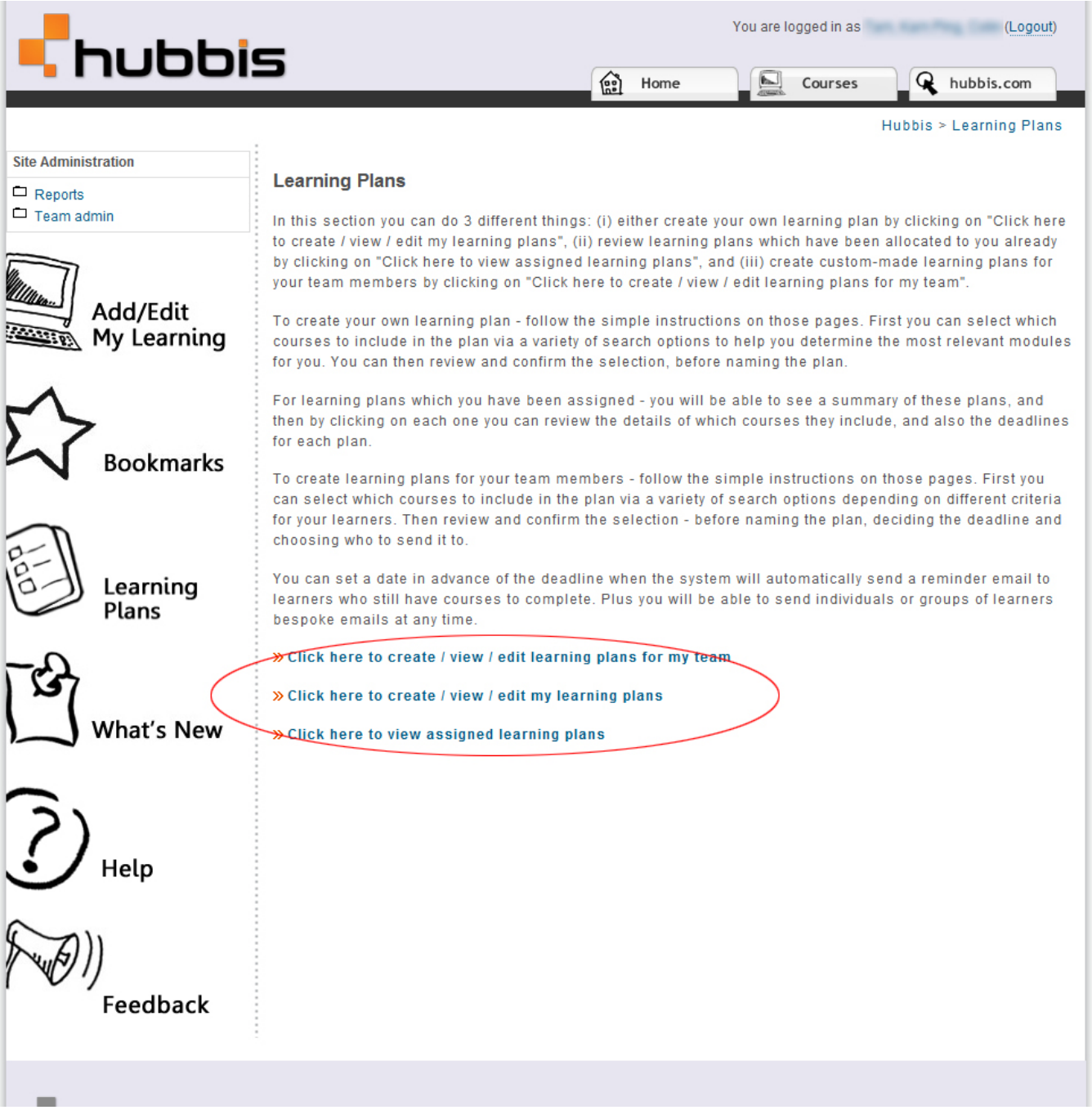


Learning plans - introduction

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

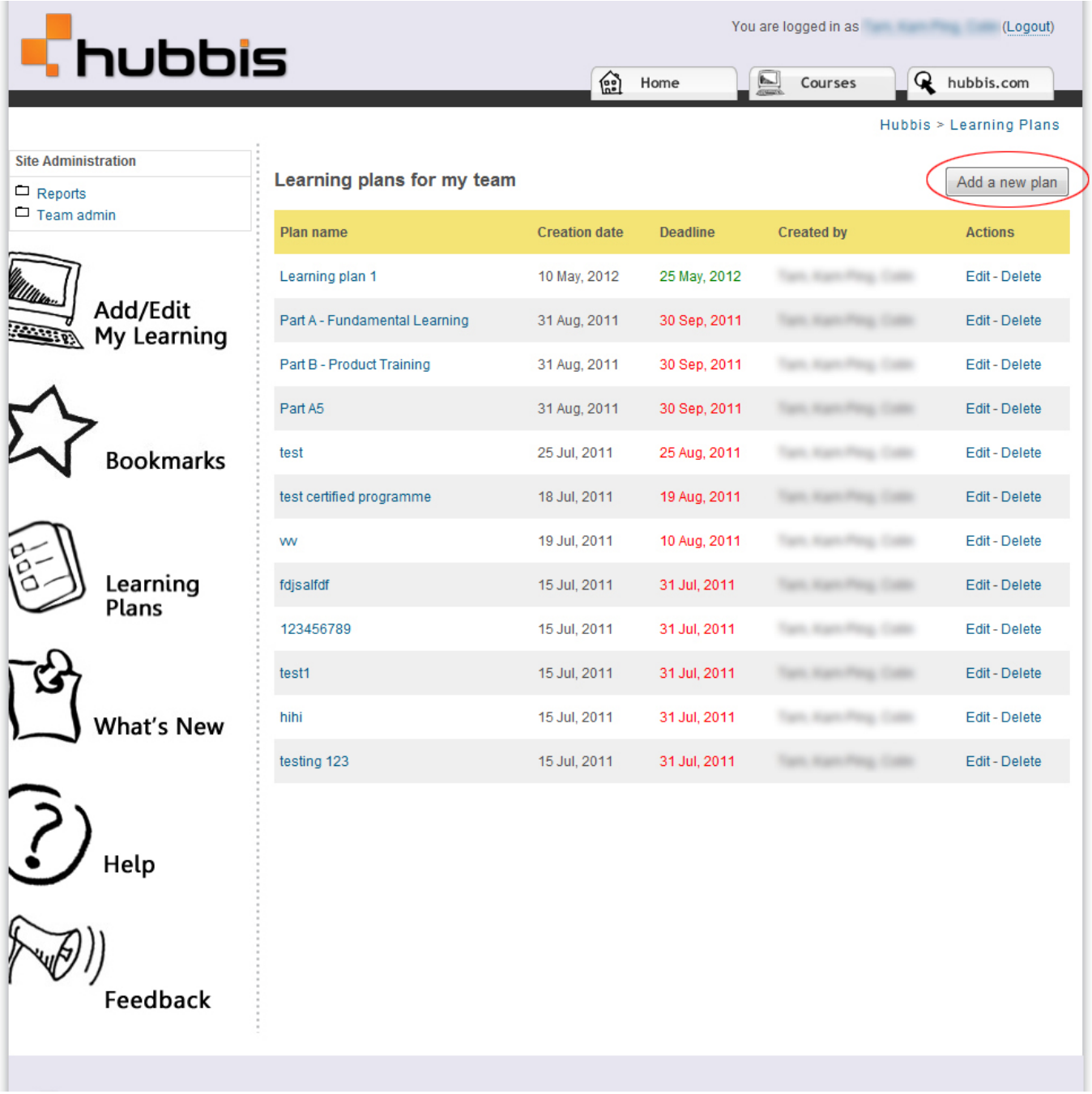


Team managers can create custom-made Learning Plans for team members.



Team managers can list all the Learning Plans they have created.

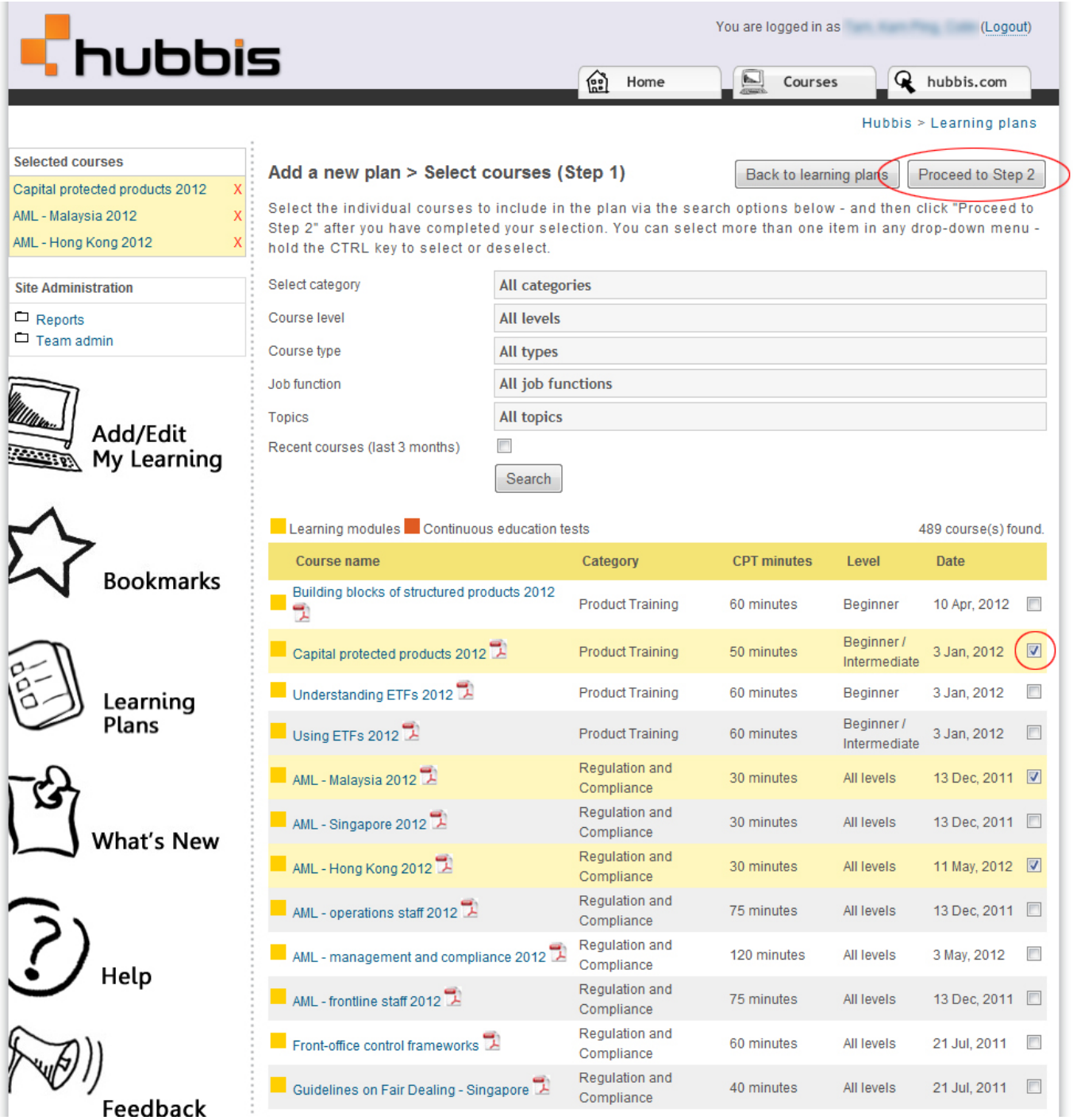
1. Click on the Plan name to view details
2. Edit this Learning Plan
3. Delete this Learning Plan
4. Add a new Plan



Add a new plan

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

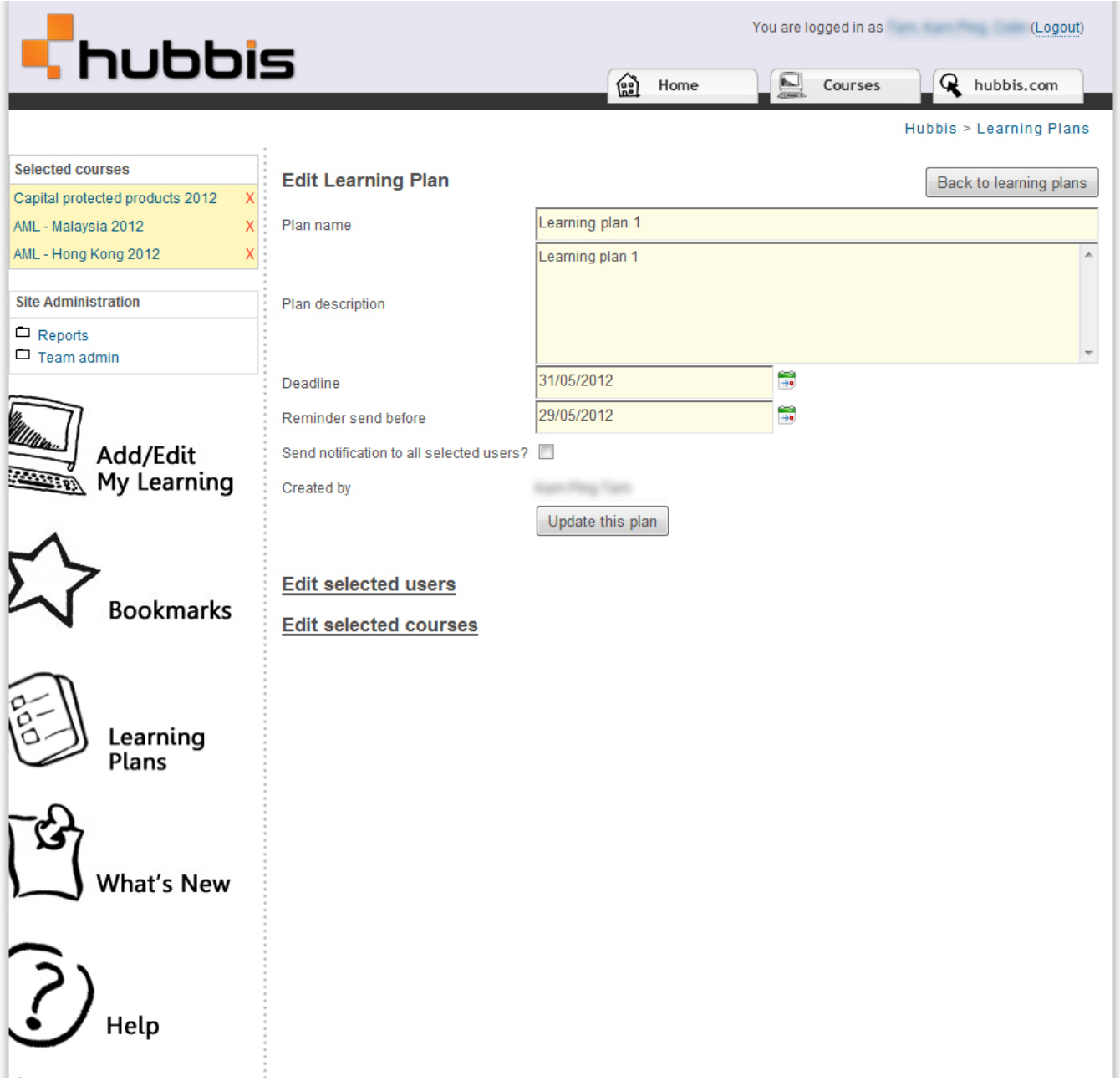


Select users and add Plan details. Complete the Learning Plan by entering the details below - including who to allocate it to and the deadline. Click “Create a new learning plan” to complete the process.

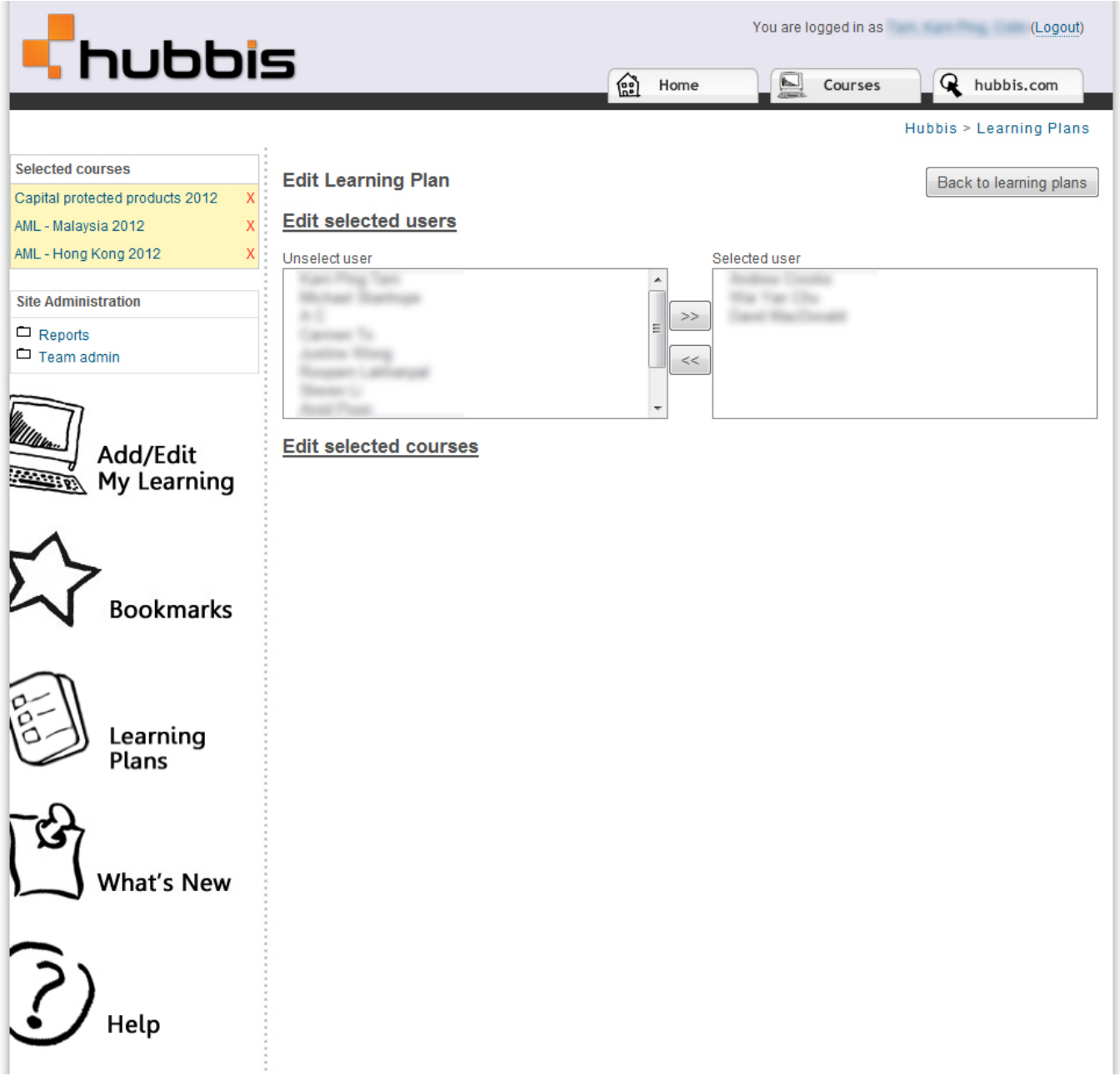
1. Select or deselect to allocate users
2. Click on this icon to pick the Deadline and Reminder dates

Edit learning plan

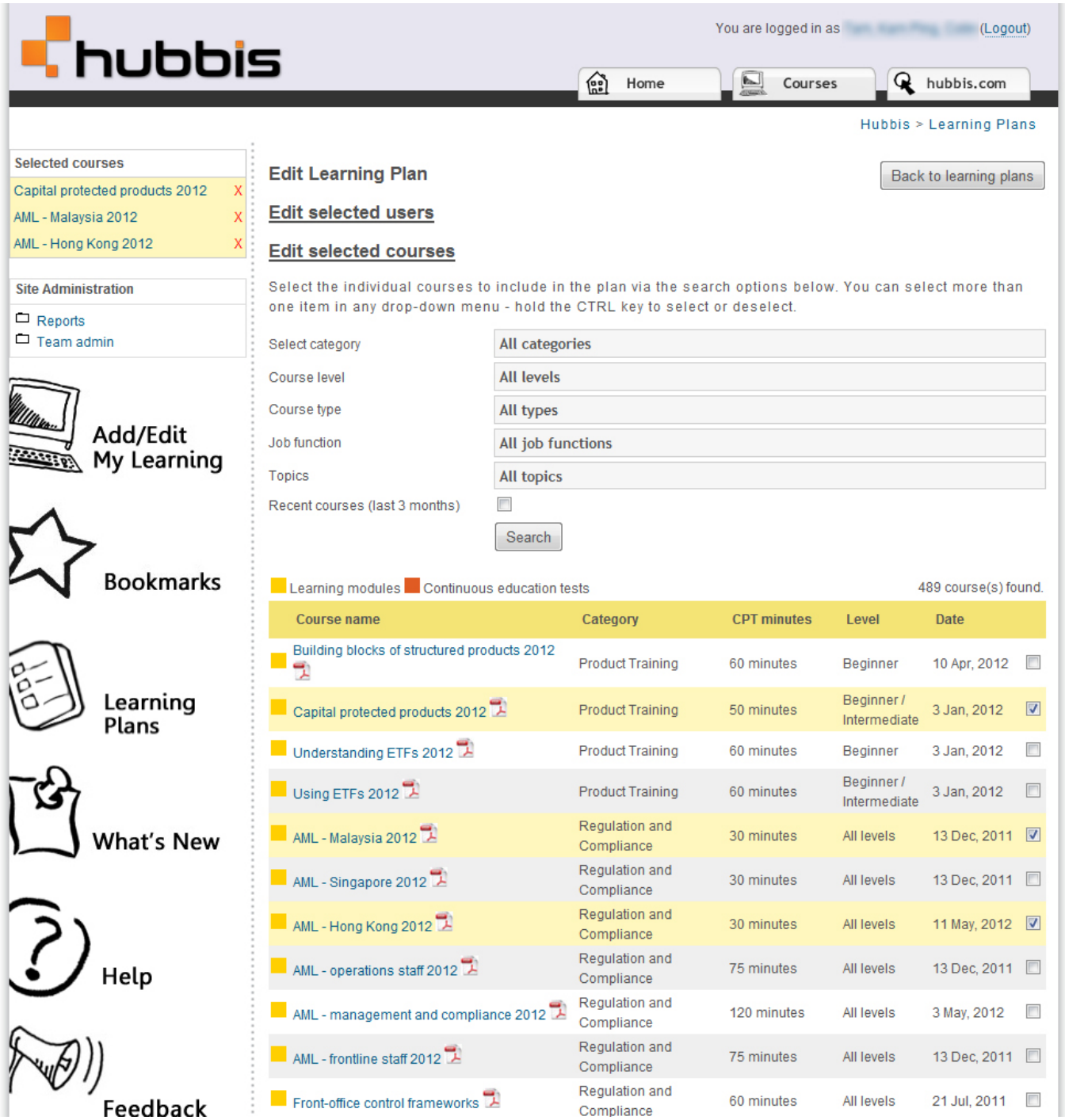
Tick this box “Send notification to all selected users” to send an email to all selected users with the Plan details.



Change selected users.

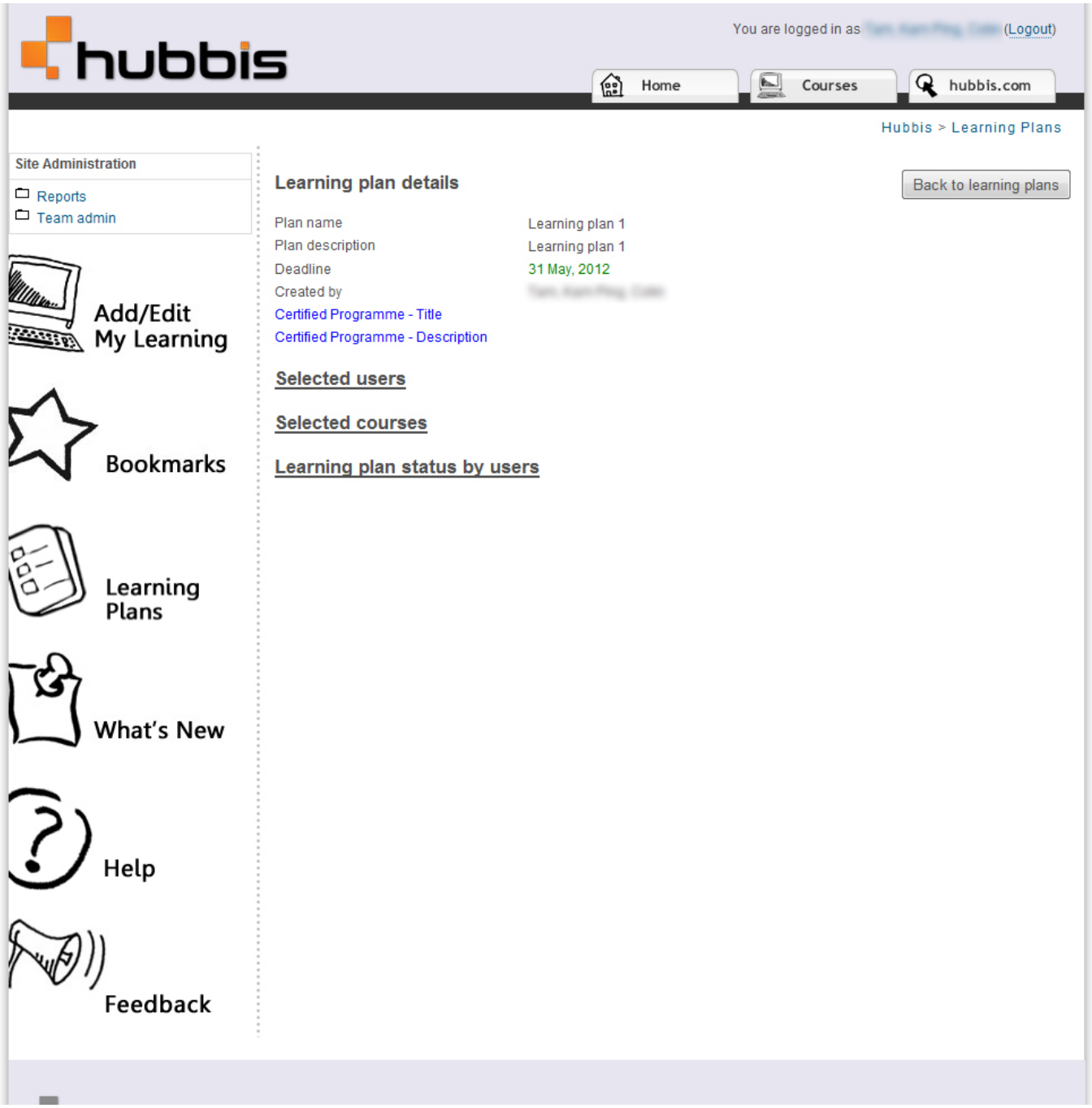


Add / delete selected courses.

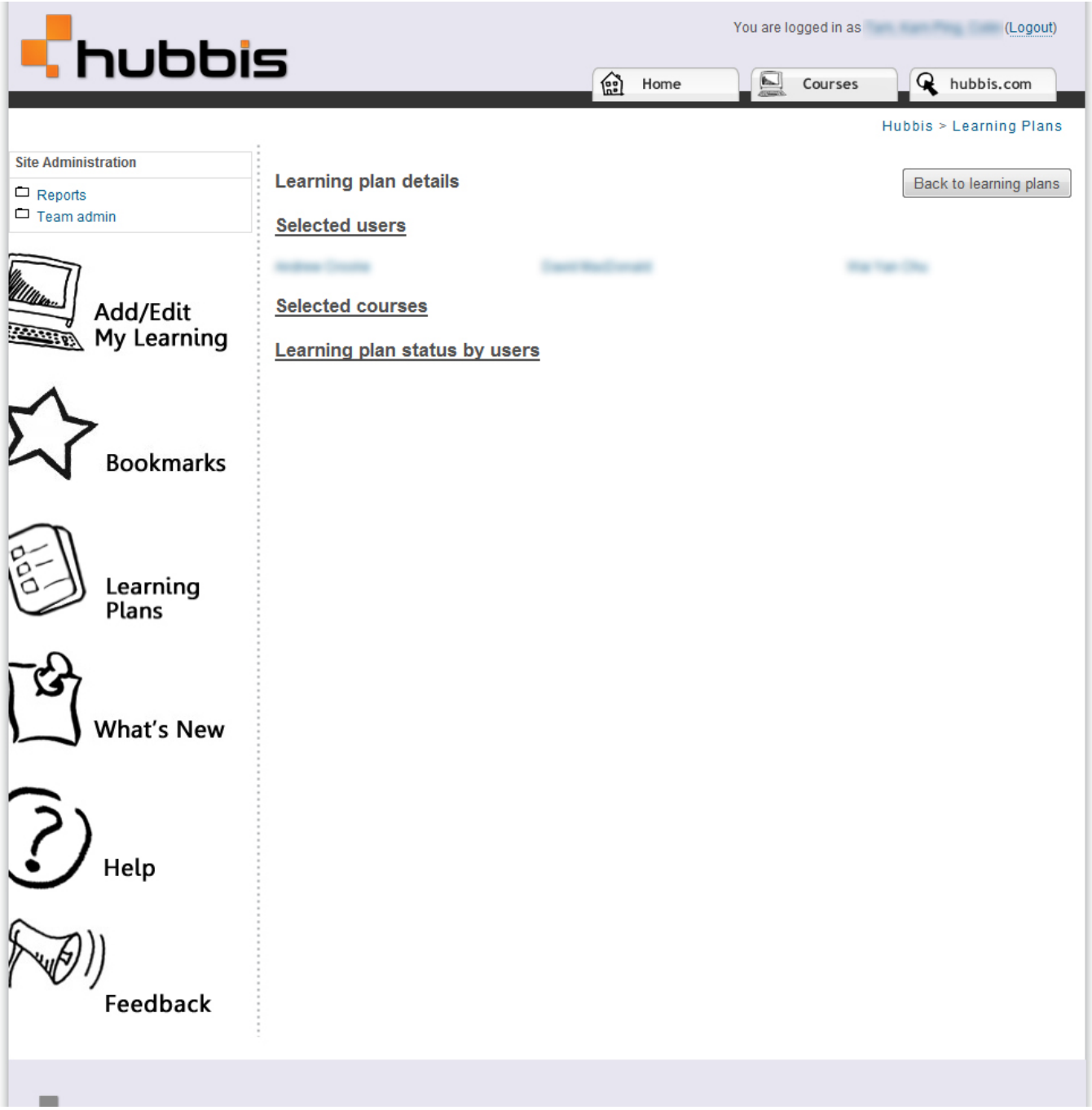


View plan details

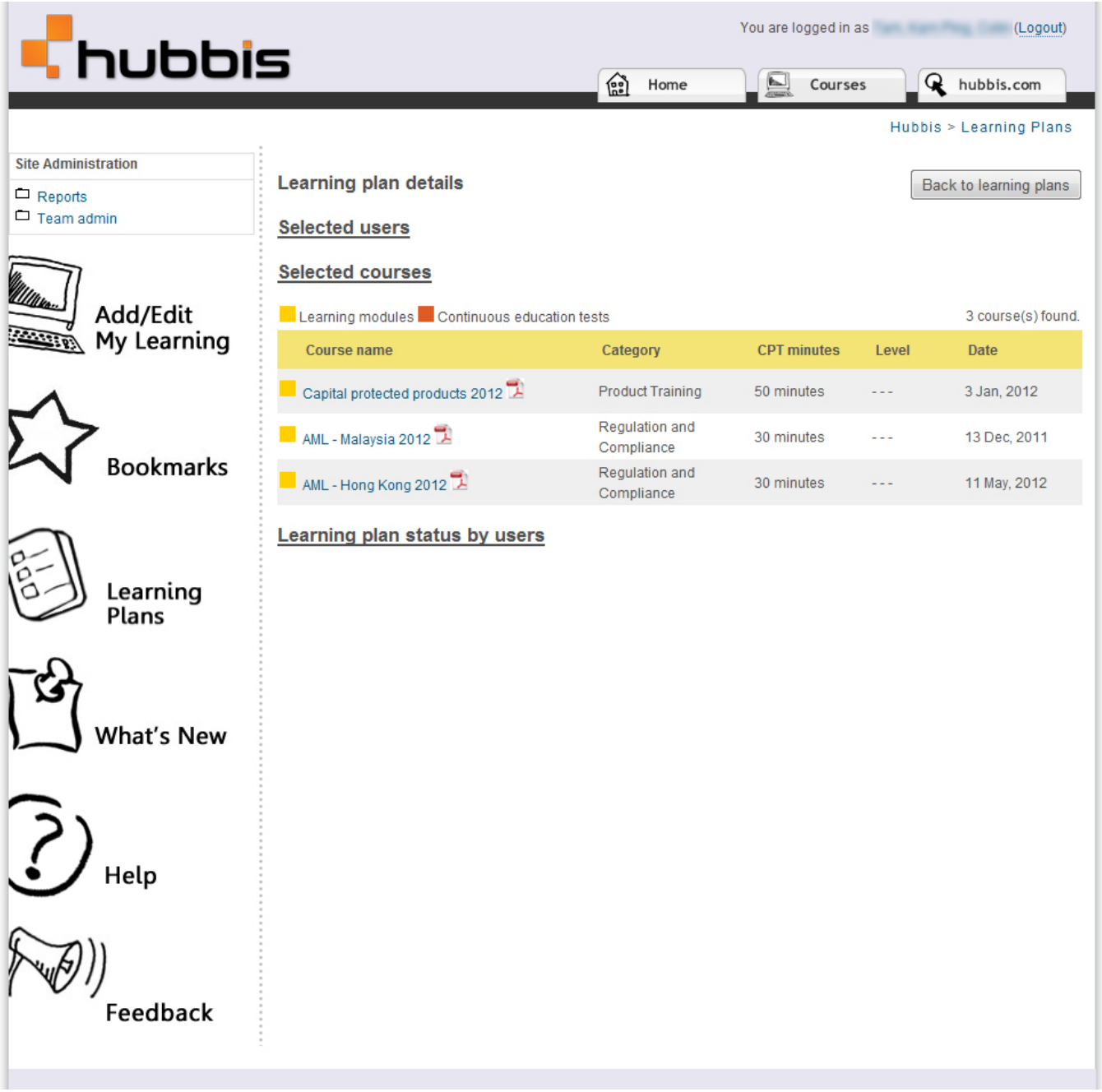
If you see the name and description of the certified programme (highlighted in blue) - this indicates that it is a certified course.



View selected users.



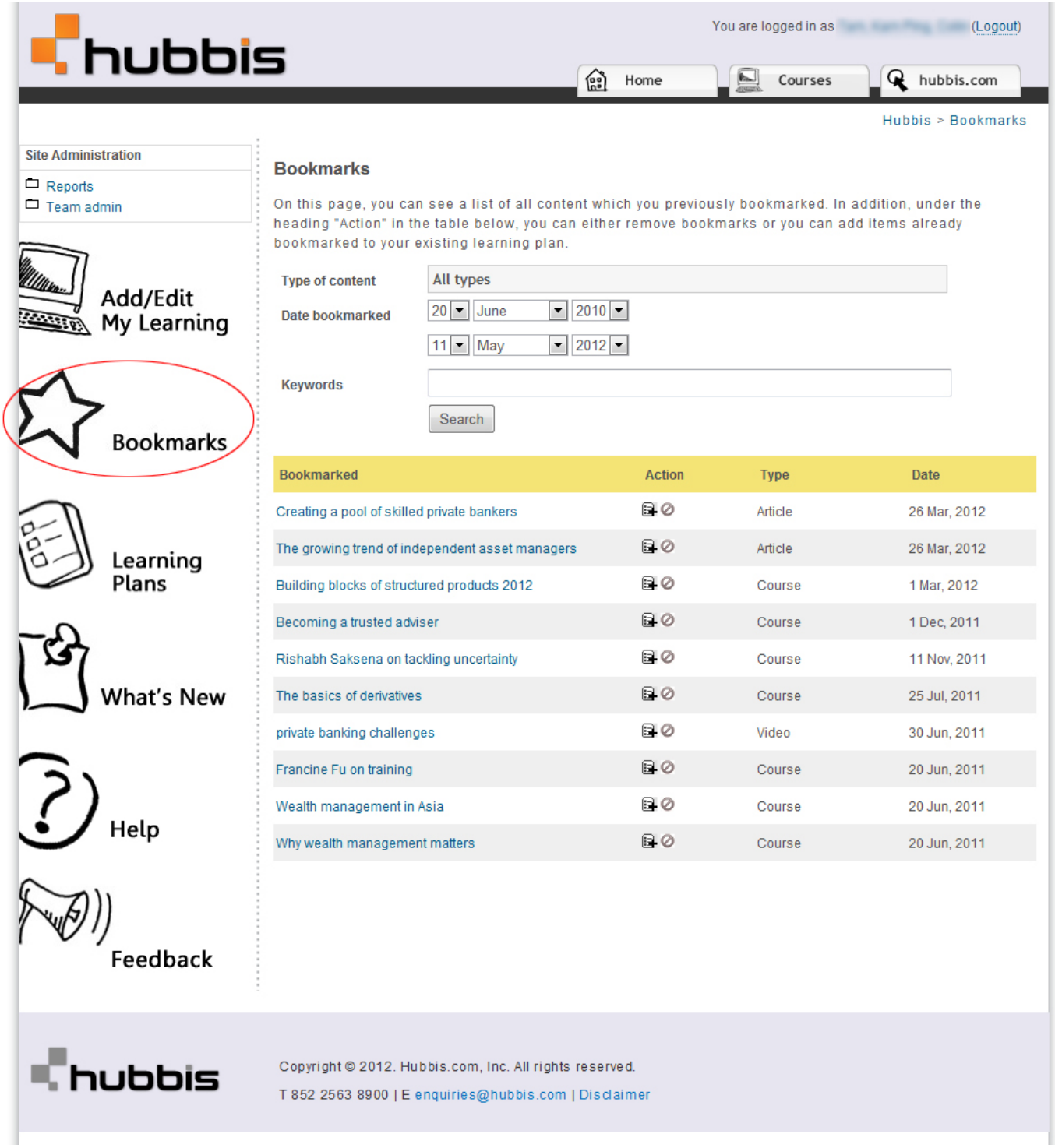
See a summary of the selected courses.



Bookmarks

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.



Add/Edit My Learning

You can tailor this platform to meet the specific training needs of your team members.

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 team member 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.

What's new

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