

Learning Management System

User Guide - Team Managers



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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-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

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You are logged in as  [Logout](#)

[!\[\]\(9aae4ef11f04080694e1bcd3250dc654_img.jpg\) Home](#) [!\[\]\(1f875e8ff0db454eb302861a56ff194f_img.jpg\) Courses](#) [!\[\]\(05604d380e755a92e3161ab249a7c58e_img.jpg\) hubbis.com](#)

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.

Add/Edit My Learning

Bookmarks

Learning Plans

What's New

Help

Feedback

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 ▶](#)

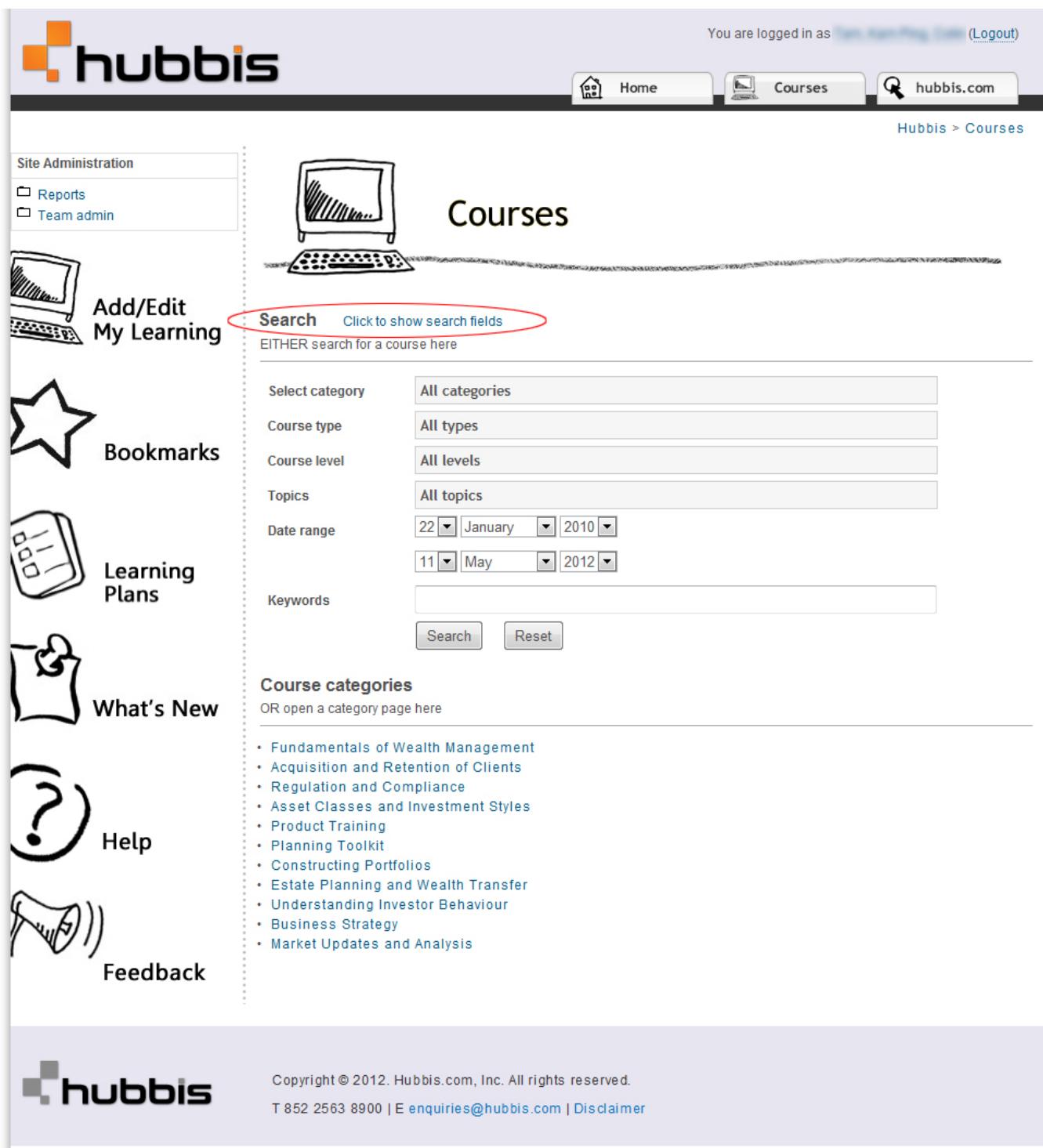
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Main courses page

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.



The screenshot shows the hubbis Courses page. At the top right, it says "You are logged in as [redacted] (Logout)". Below that are links for "Home" (with a house icon), "Courses" (with a computer monitor icon), and "hubbis.com" (with a magnifying glass icon). The main title "Courses" is centered above a drawing of a computer monitor and keyboard. To the left, there's a sidebar with icons and labels: "Add/Edit My Learning" (laptop icon), "Bookmarks" (star icon), "Learning Plans" (checklist icon), "What's New" (document icon), "Help" (question mark icon), and "Feedback" (megaphone icon). The main content area has a red oval around the "Search" button and the "Click to show search fields" link. Below this, there are several search filters: "Select category" (All categories), "Course type" (All types), "Course level" (All levels), "Topics" (All topics), and "Date range" (dropdowns for January 2010 and May 2012). There's also a "Keywords" input field and "Search" and "Reset" buttons. A section titled "Course categories" lists various wealth management topics:

- 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

At the bottom, the hubbis logo is shown again, along with copyright information: "Copyright © 2012. Hubbis.com, Inc. All rights reserved. T 852 2563 8900 | E enquiries@hubbis.com | [Disclaimer](#)".

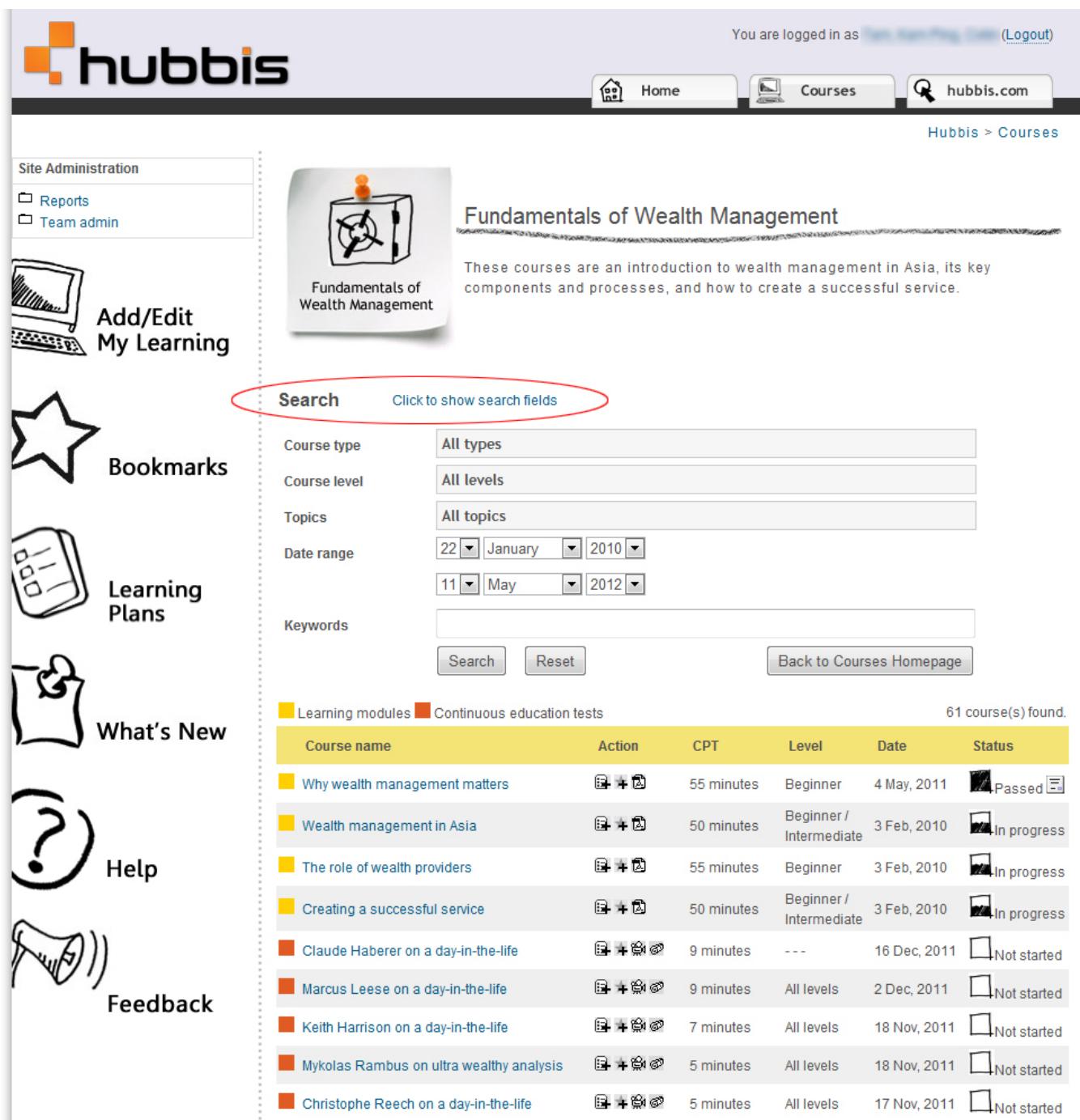
Inside an individual topic / category page

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 a user interface for a learning management system. On the left, there's a sidebar with icons for Site Administration, Reports, Team admin, Add/Edit My Learning, Bookmarks, Learning Plans, What's New, Help, and Feedback. The main content area is titled "Fundamentals of Wealth Management". It features a small icon of a briefcase with a dollar sign and a lock. Below the title, a description reads: "These courses are an introduction to wealth management in Asia, its key components and processes, and how to create a successful service." A red oval highlights the "Search" button and the "Click to show search fields" link. Below these are search filters for Course type, Course level, Topics, Date range (set to January 2010 to May 2012), and Keywords. There are also "Search" and "Reset" buttons, and a link to "Back to Courses Homepage". At the bottom, a table lists 61 course(s) found, categorized by color: yellow for Learning modules and orange for Continuous education tests. The columns in the table are Course name, Action, CPT, Level, Date, and Status. The first few rows of the table are:

Course name	Action	CPT	Level	Date	Status
Why wealth management matters		55 minutes	Beginner	4 May, 2011	Passed
Wealth management in Asia		50 minutes	Beginner / Intermediate	3 Feb, 2010	In progress
The role of wealth providers		55 minutes	Beginner	3 Feb, 2010	In progress
Creating a successful service		50 minutes	Beginner / Intermediate	3 Feb, 2010	In progress
Claude Haberer on a day-in-the-life		9 minutes	---	16 Dec, 2011	Not started
Marcus Leese on a day-in-the-life		9 minutes	All levels	2 Dec, 2011	Not started
Keith Harrison on a day-in-the-life		7 minutes	All levels	18 Nov, 2011	Not started
Mykolas Rambus on ultra wealthy analysis		5 minutes	All levels	18 Nov, 2011	Not started
Christophe Reech on a day-in-the-life		5 minutes	All levels	17 Nov, 2011	Not started

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.

hubbis

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

Mark Wightman on common com...

Skills	Knowledge	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)

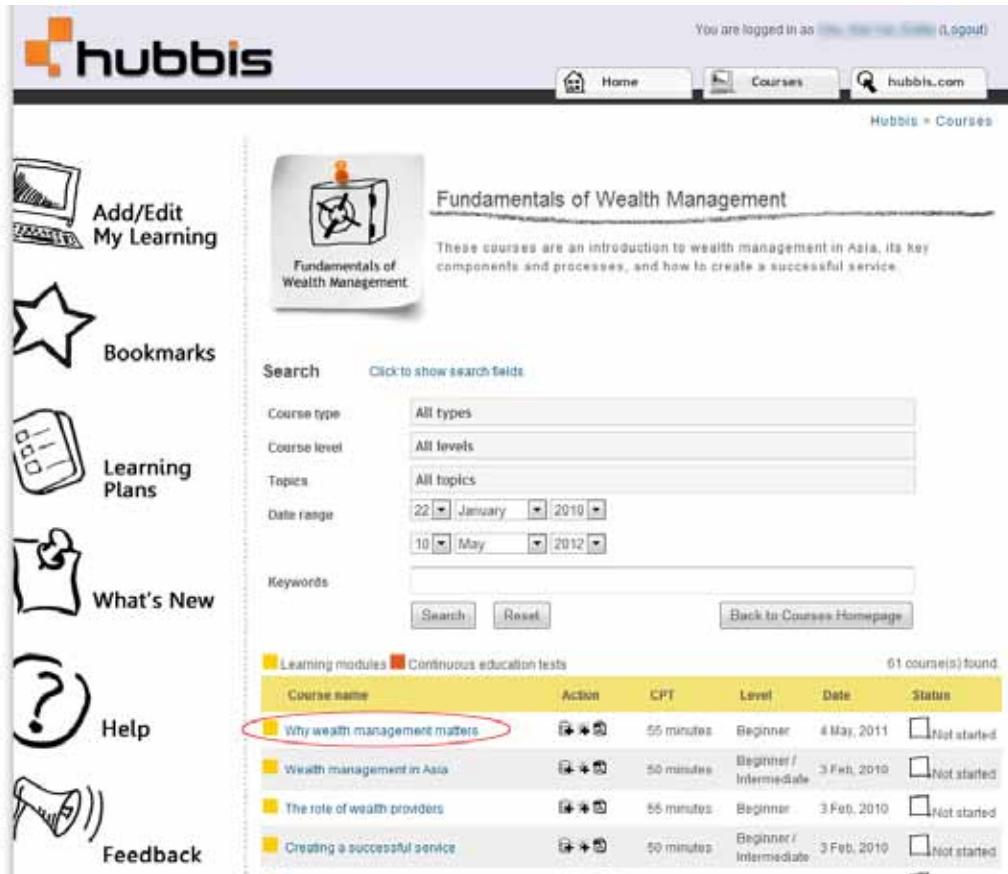
Total: 48 minutes

Andrew Crooke
Editor
Hubbis

Start a course

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. On the left, there is a sidebar with icons for 'Add/Edit My Learning', 'Bookmarks', 'Learning Plans', 'What's New', 'Help', and 'Feedback'. The main content area displays a course titled 'Fundamentals of Wealth Management' with a brief description: 'These courses are an introduction to wealth management in Asia, its key components and processes, and how to create a successful service.' Below this, there is a search form with fields for 'Course type' (set to 'All types'), 'Course level' (set to 'All levels'), 'Topics' (set to 'All topics'), 'Date range' (set to '22 January 2010' to '10 May 2012'), and 'Keywords'. There are also 'Search' and 'Reset' buttons, and a link to 'Back to Courses Homepage'. A table lists four course entries under the heading '61 course(s) found':

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 hubbis website interface, specifically the course summary page for 'Why wealth management matters'. At the top, there is a breadcrumb navigation: 'Hubbis > Courses > Fundamentals of Wealth Management > SCORMs/AICCs > Why wealth management matters'. The main title is 'Why wealth management matters'. Below the title, there is a descriptive text box: '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.' At the bottom of the page, there is a large blue 'Start' button with a white border, which is circled in red. The footer contains the hubbis logo and copyright information: 'Copyright © 2012. Hubbis.com, Inc. All rights reserved. T 652 2563 8900 | E enquiries@hubbis.com | [Disclaimer](#)'.

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 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 a typical article page from the hubbis website. At the top, the hubbis logo is visible along with a message indicating "You are logged in as [username]". A navigation bar below includes links for News, Videos, Articles, Experts, Topics, Glossary, Profiles, Directory, Learning, Events, and About. The main content area features a breadcrumb trail: Home > Articles > Indian wealth management - a developing landscape. The title of the article is "Indian wealth management - a developing landscape". Below the title are several sharing options: Print this page, Add your comment, Email the editor, and Forward to a friend. The article itself is by Amit Dassani and discusses the latest developments in Indian wealth management. It includes a date of June 2011 and tags such as Wealth management, India. Below the article are links for Watch the Video, Download PDF, Continuous Education Test, Bookmark, and Add to Learning Plan. A red oval highlights the "Continuous Education Test" link. To the right of the article, there is a sidebar titled "Other articles you might find interesting" which lists four related articles. At the bottom of the page, there is a section for rating the article (with five stars) and sharing it on social media (Facebook, LinkedIn, Twitter).

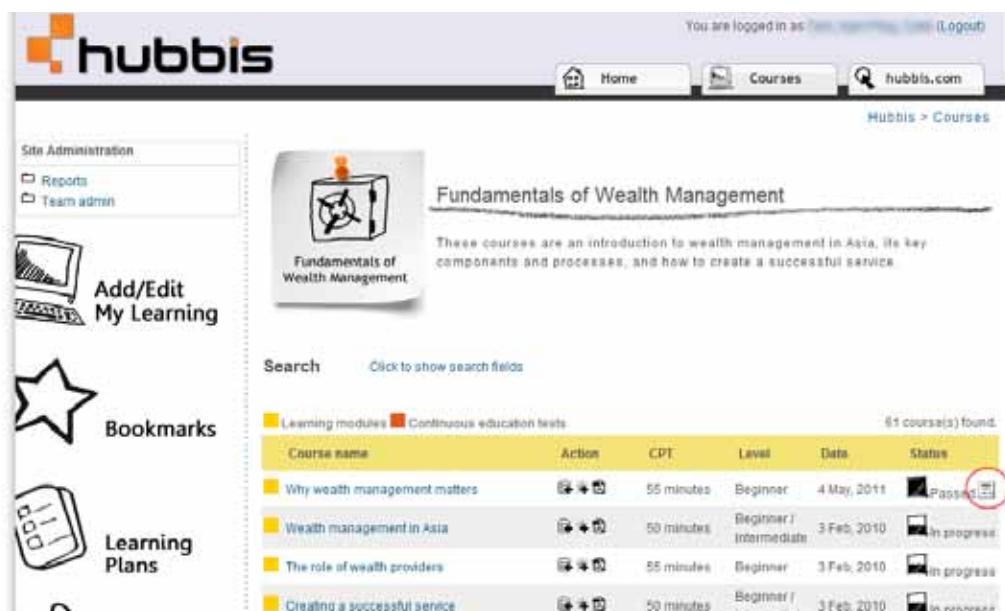
Continuous Education Test

- 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

Get a certificate

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

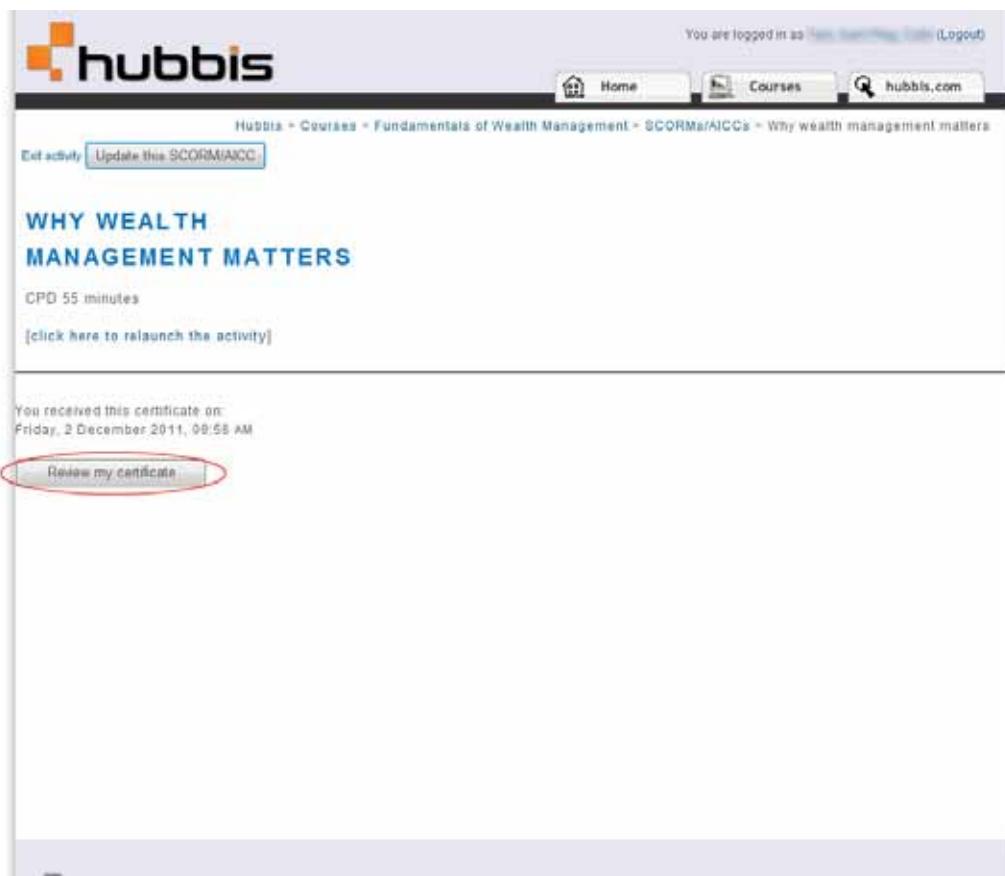
Users can retake a course at any time until they pass it - they simply go back to that individual course, click on the link and follow the instructions.



The screenshot shows the hubbis platform interface. On the left, there's a sidebar with 'Site Administration' (Reports, Team admin), 'Add/Edit My Learning' (Bookmarks, Learning Plans), and search fields. The main content area displays the 'Fundamentals of Wealth Management' course, which is described as an introduction to wealth management in Asia. Below this, a table lists four learning modules:

Course name	Action	CPT	Level	Date	Status
Why wealth management matters		55 minutes	Beginner	4 May, 2011	<input checked="" type="checkbox"/> Passed
Wealth management in Asia		50 minutes	Beginner / Intermediate	3 Feb, 2010	<input type="checkbox"/> In progress
The role of wealth providers		55 minutes	Beginner	3 Feb, 2010	<input type="checkbox"/> In progress
Creating a successful service		50 minutes	Beginner / Intermediate	3 Feb, 2010	<input type="checkbox"/> In progress

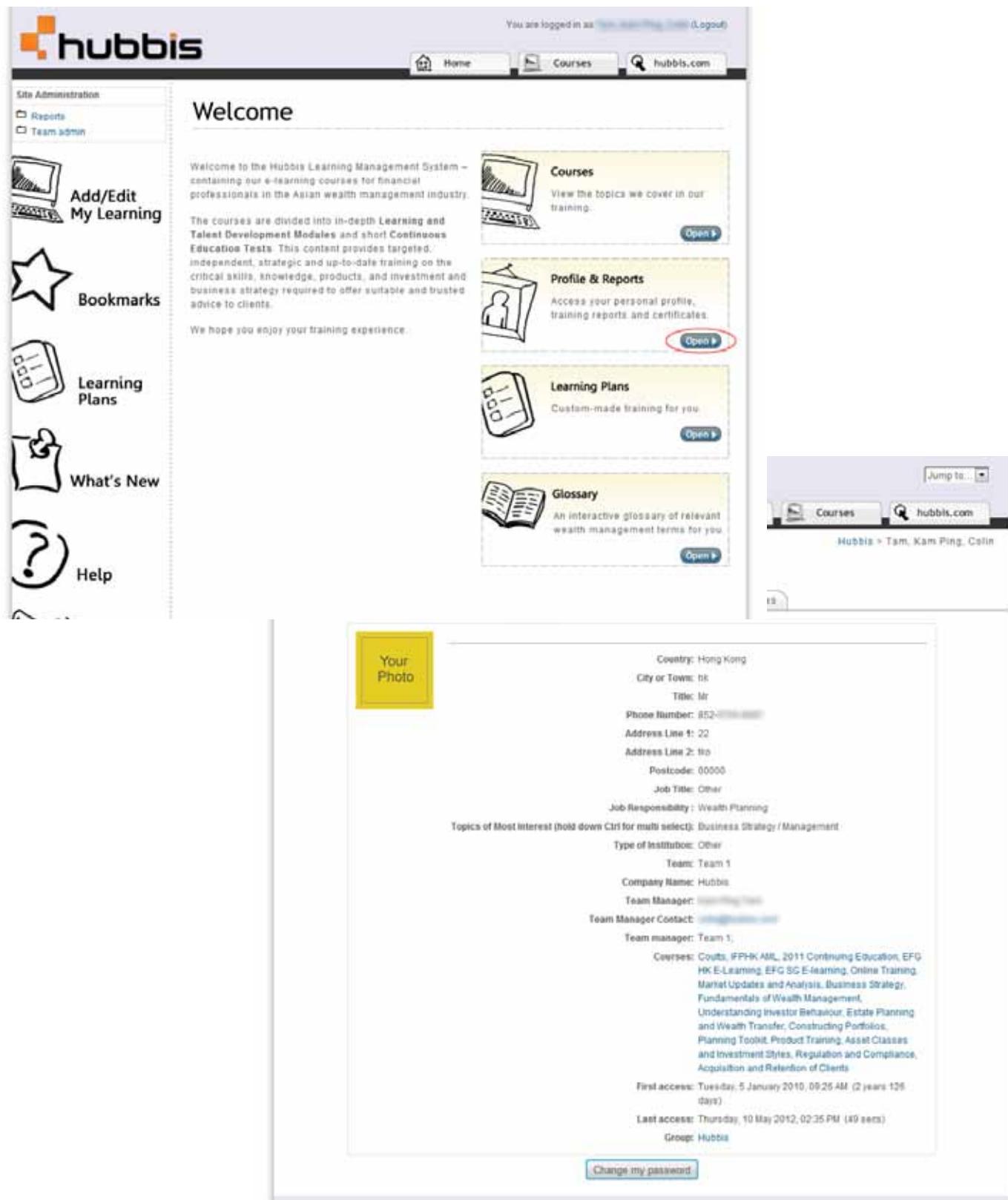
If a user has received a Certificate before for that individual course, they will need to click the "Review my certificate" button.



This screenshot shows a detailed view of the 'Why wealth management matters' course. At the top, there are navigation links for 'Hubbis', 'Courses', and 'SCORMs/AICCs'. Below this, a button says 'Edit activity' and 'Update this SCORM/AICC.' The main content area features the title 'WHY WEALTH MANAGEMENT MATTERS' in large blue capital letters. It includes a 'CPD 55 minutes' badge and a link '[click here to relaunch the activity]'. A note states 'You received this certificate on: Friday, 2 December 2011, 09:58 AM'. At the bottom, a button labeled 'Review my certificate' is circled in red.

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.



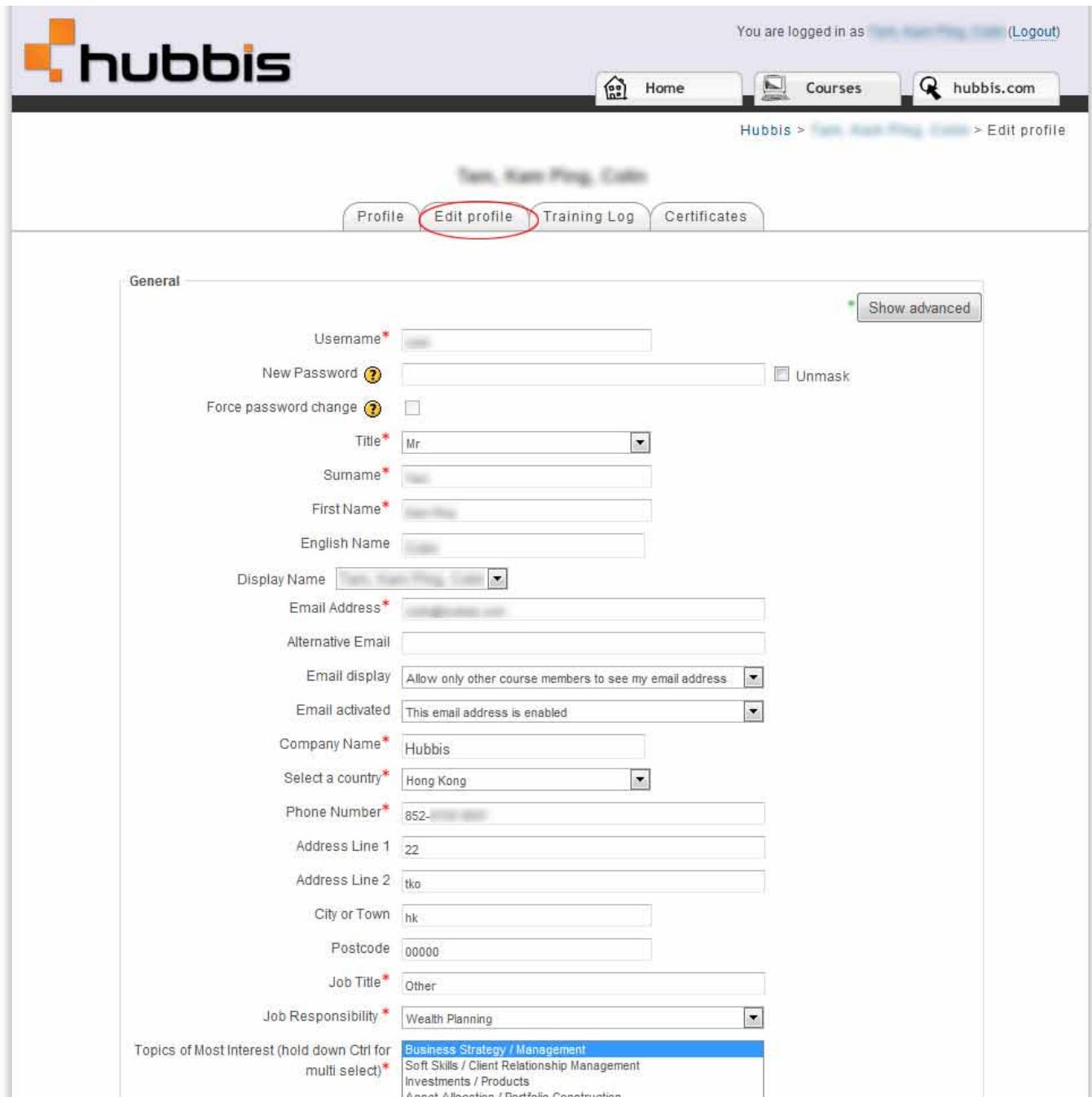
The screenshot displays the Hubbis Learning Management System interface. At the top, there's a navigation bar with links for Home, Courses, and a search function. A message indicates "You are logged in as [redacted] (Logout)". On the left, a sidebar lists various options: Site Administration, Reports, Team admin, Add/Edit My Learning (with a computer icon), Bookmarks (with a star icon), Learning Plans (with a clipboard icon), What's New (with a document icon), and Help (with a question mark icon). The main content area features a "Welcome" message and a brief description of the system's purpose. It includes four main modules: "Courses" (View topics in training), "Profile & Reports" (Access personal profile, reports, and certificates, with an "Open" button circled in red), "Learning Plans" (Custom-made training), and "Glossary" (Interactive glossary of wealth management terms). Below these, a breadcrumb trail shows "Hubbis > Tam, Kam Ping, Colin". The bottom section is a detailed user profile form. It includes fields for "Your Photo" (with a yellow placeholder box), personal information like Country (Hong Kong), City or Town (hk), Title (Mr), Phone Number (852- [redacted]), Address Line 1 (22), Address Line 2 ([redacted]), Postcode (00000), Job Title (Other), Job Responsibility (Wealth Planning), and topics of interest (Business Strategy / Management). It also lists institutional details such as Type of Institution (Other), Team (Team 1), Company Name (Hubbis), Team Manager ([redacted]), Team Manager Contact ([redacted]), and Team manager (Team 1). A long list of courses is provided, including Coutts, IFPHK AMI, 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. Log-in history shows First access on Tuesday, 5 January 2010, 09:26 AM (2 years 126 days) and Last access on Thursday, 10 May 2012, 02:35 PM (499 secs). The profile is associated with Group Hubbis. A "Change my password" button is located at the bottom of the profile form.

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.



The screenshot shows the hubbis profile editing interface. At the top, there's a navigation bar with links for Home, Courses, and hubbis.com. Below that, a breadcrumb trail indicates the current location: Hubbis > Edit profile. The main content area has tabs for Profile, Edit profile, Training Log, and Certificates, with 'Edit profile' being the active tab and circled in red. A 'General' section contains various profile fields like Username, New Password, 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, and Job Responsibility. Most fields have an asterisk indicating they are required. At the bottom, there's a section for 'Topics of Most Interest' with a dropdown menu showing 'Business Strategy / Management' selected, along with other options like Soft Skills / Client Relationship Management, Investments / Products, and Asset Allocation / Portfolio Construction.

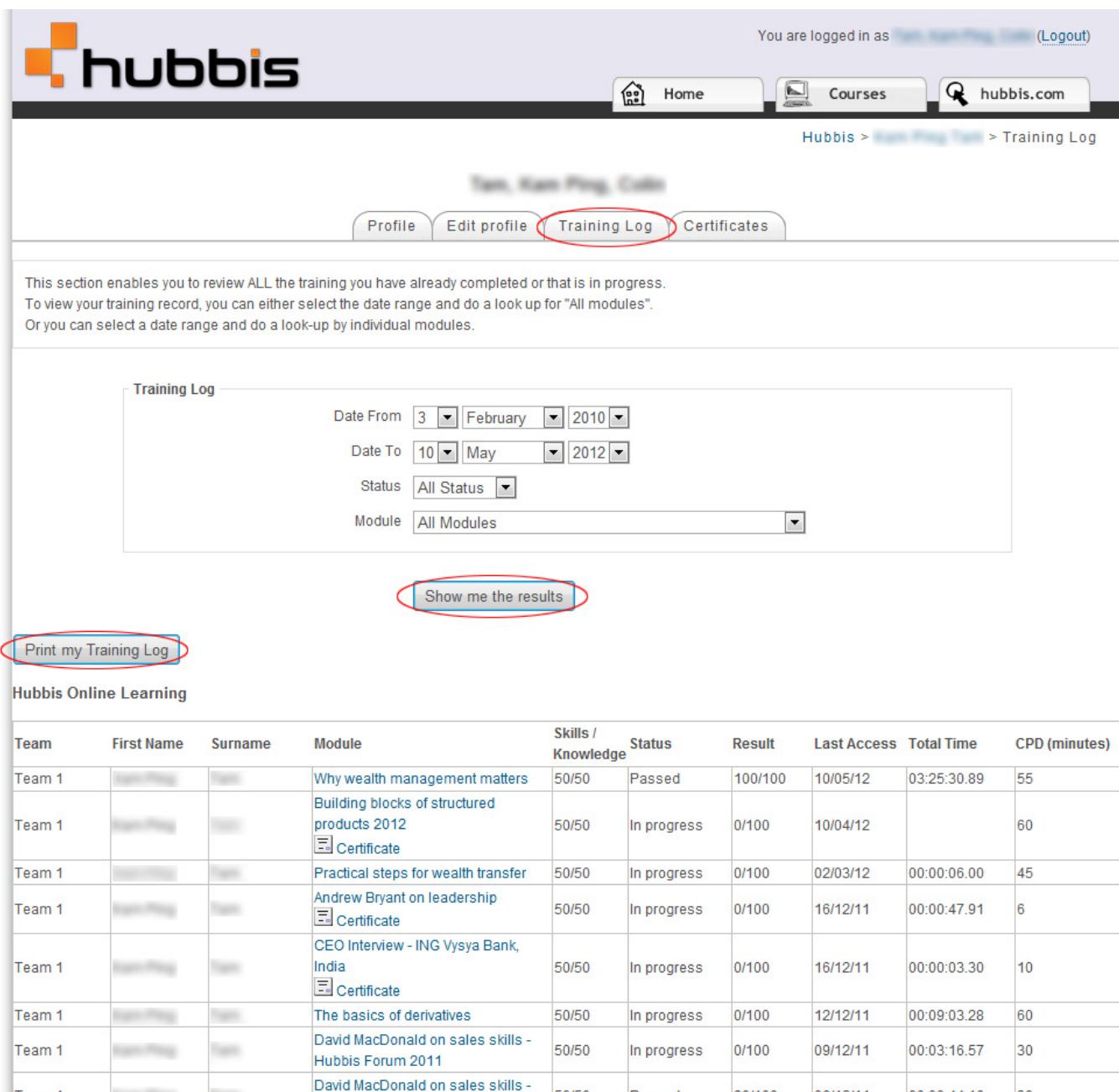
Training log

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



The screenshot shows the hubbis profile page with the "Training Log" tab highlighted (circled in red). Below it, there are search filters for Date From (3 February 2010), Date To (10 May 2012), Status (All Status), and Module (All Modules). A blue button labeled "Show me the results" is also circled in red. At the bottom left, a blue button labeled "Print my Training Log" is circled in red. The main table displays training logs for various users and modules, including titles like "Why wealth management matters", "Building blocks of structured products 2012", and "CEO Interview - ING Vysya Bank, India".

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

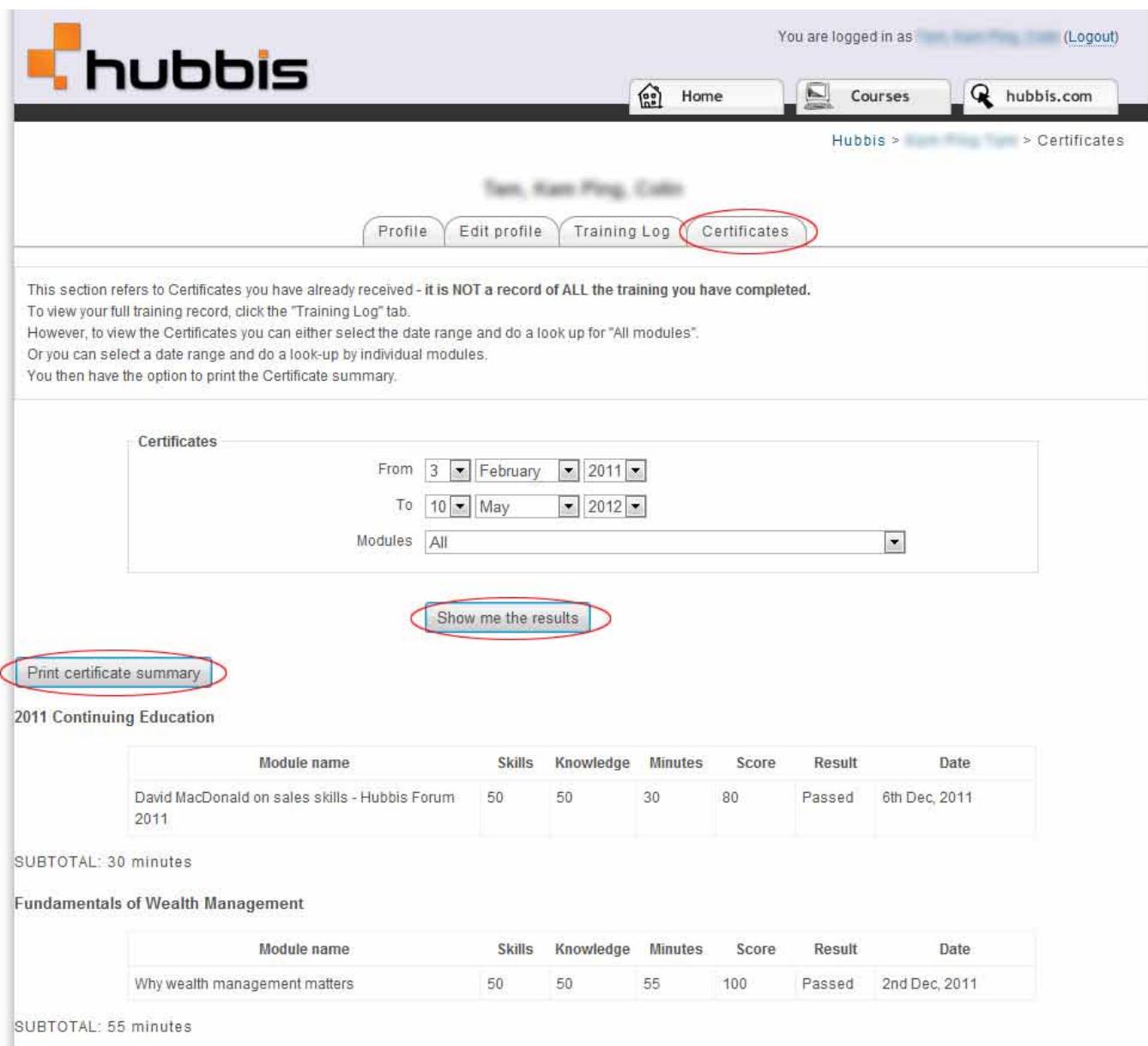
Certificates

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:

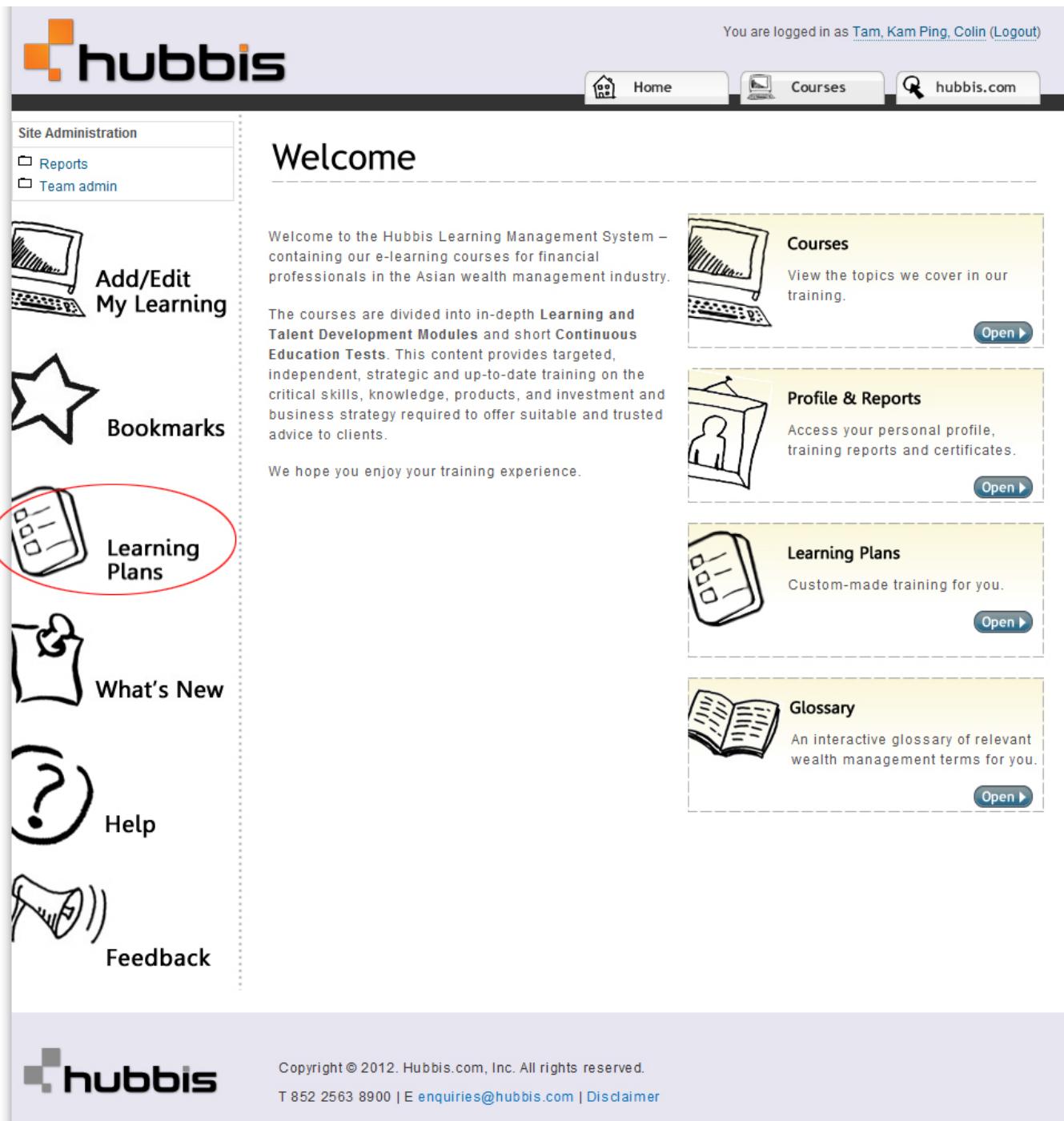
1. Click on the "Certificates" tab
2. Select a date range or individual module and click on "Show me the results"
3. Click "Print my certificate summary" to get the information in a certificate format



The screenshot shows the hubbis profile page with the following details:

- Header:** hubbis logo, You are logged in as [redacted] (Logout), Home, Courses, hubbis.com
- Breadcrumbs:** Hubbis > [redacted] > Certificates
- User Information:** Name: Koen, Last Name: Colen
- Navigation Tabs:** Profile, Edit profile, Training Log, Certificates (circled in red)
- Text:** 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.
- Form:** Certificates search fields:
 - From: 3 February 2011
 - To: 10 May 2012
 - Modules: All
- Buttons:** Show me the results (circled in red), Print certificate summary (circled in red)
- Table:** 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 |
- Text:** SUBTOTAL: 30 minutes
- Section:** Fundamentals of Wealth Management
 - Table:
| Module name | Skills | Knowledge | Minutes | Score | Result | Date |
| --- | --- | --- | --- | --- | --- | --- |
| Why wealth management matters | 50 | 50 | 55 | 100 | Passed | 2nd Dec, 2011 |
 - SUBTOTAL: 55 minutes

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



The screenshot shows the Hubbis Learning Management System homepage. The top navigation bar includes the Hubbis logo, user information (Tam, Kam Ping, Colin), and links for Home, Courses, and the search bar. On the left, a sidebar lists Site Administration, Reports, Team admin, Add/Edit My Learning, Bookmarks, Learning Plans (circled in red), What's New, Help, and Feedback. The main content area features a 'Welcome' message and details about the system's courses for financial professionals. It also highlights 'Courses', 'Profile & Reports', 'Learning Plans', and 'Glossary' sections, each with an 'Open' button. At the bottom, there's a footer with the Hubbis logo and copyright information.

You are logged in as Tam, Kam Ping, Colin (Logout)

Site Administration

- Reports
- Team admin

Add/Edit My Learning

Bookmarks

Learning Plans

What's New

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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

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



You are logged in as [REDACTED] ([Logout](#))

[!\[\]\(16aeb3237f754b7599789ef654002ff2_img.jpg\) Home](#) [!\[\]\(4bedab4577924086e5ae6352aa0c2ad0_img.jpg\) Courses](#) [!\[\]\(5462a62144ec6ad15b20b37b7ca1cfd9_img.jpg\) hubbis.com](#)

[Hubbis > Learning Plans](#)

Site Administration

- [Reports](#)
- [Team admin](#)

Add/Edit My Learning

Bookmarks

Learning Plans

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Learning Plans

In this section you can do 3 different things: (i) either create your own learning plan by clicking on "Click here to create / view / edit my learning plans", (ii) review learning plans which have been allocated to you already by clicking on "Click here to view assigned learning plans", and (iii) create custom-made learning plans for your team members by clicking on "Click here to create / view / edit learning plans for my team".

To create your own learning plan - follow the simple instructions on those pages. First you can select which courses to include in the plan via a variety of search options to help you determine the most relevant modules for you. You can then review and confirm the selection, before naming the plan.

For learning plans which you have been assigned - you will be able to see a summary of these plans, and then by clicking on each one you can review the details of which courses they include, and also the deadlines for each plan.

To create learning plans for your team members - follow the simple instructions on those 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 for my team](#)

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

» [Click here to view assigned learning plans](#)

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


You are logged in as  (Logout)

 Home
 Courses
 hubbis.com

[Hubbis > Learning Plans](#)

Site Administration

- [Reports](#)
- [Team admin](#)



Add/Edit My Learning



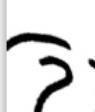
Bookmarks



Learning Plans



What's New



Help



Feedback

Learning plans for my team

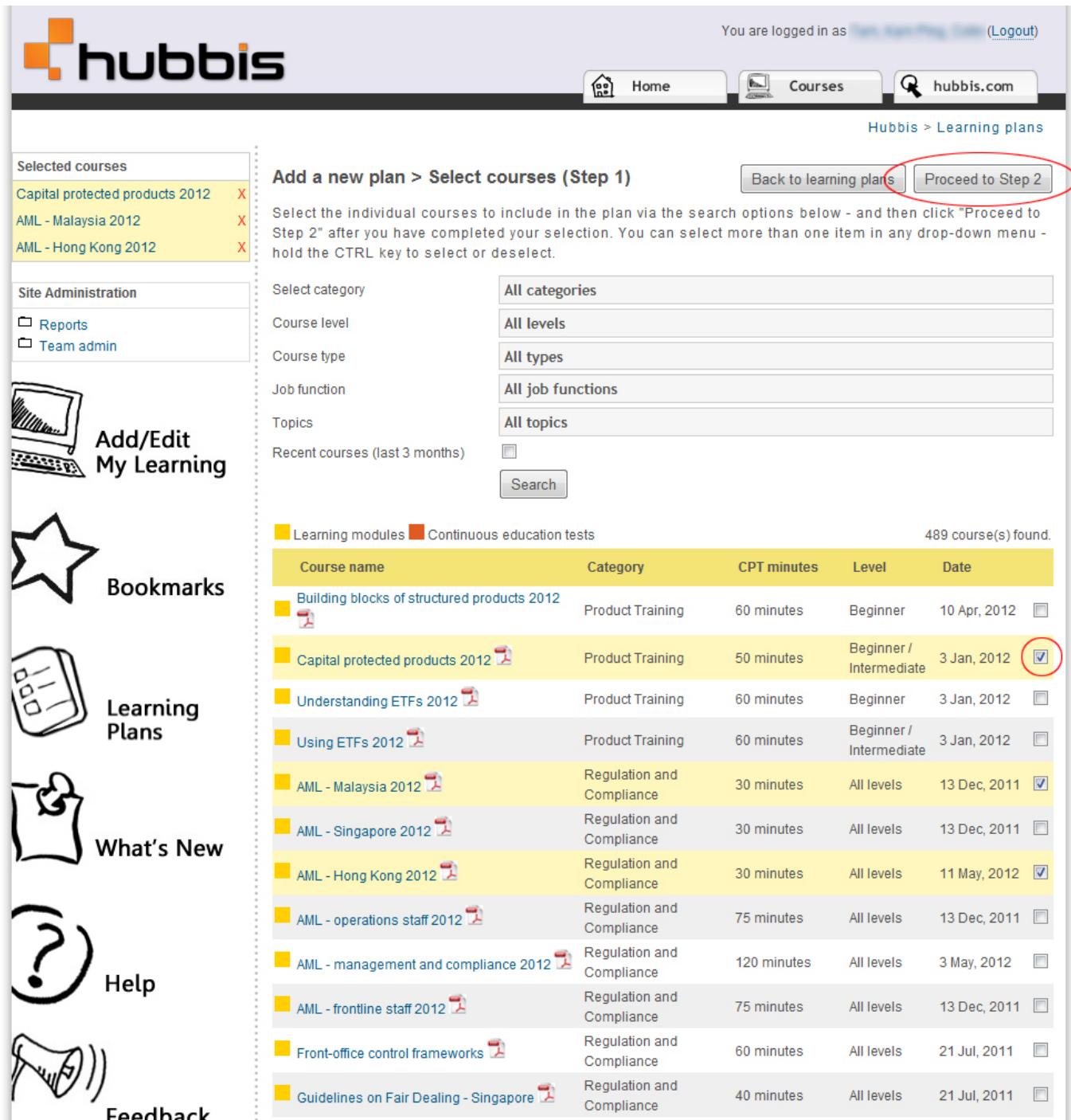
[Add a new plan](#)

Plan name	Creation date	Deadline	Created by	Actions
Learning plan 1	10 May, 2012	25 May, 2012	John Smith	Edit - Delete
Part A - Fundamental Learning	31 Aug, 2011	30 Sep, 2011	John Smith	Edit - Delete
Part B - Product Training	31 Aug, 2011	30 Sep, 2011	John Smith	Edit - Delete
Part A5	31 Aug, 2011	30 Sep, 2011	John Smith	Edit - Delete
test	25 Jul, 2011	25 Aug, 2011	John Smith	Edit - Delete
test certified programme	18 Jul, 2011	19 Aug, 2011	John Smith	Edit - Delete
vv	19 Jul, 2011	10 Aug, 2011	John Smith	Edit - Delete
fdjsalfdf	15 Jul, 2011	31 Jul, 2011	John Smith	Edit - Delete
123456789	15 Jul, 2011	31 Jul, 2011	John Smith	Edit - Delete
test1	15 Jul, 2011	31 Jul, 2011	John Smith	Edit - Delete
hihi	15 Jul, 2011	31 Jul, 2011	John Smith	Edit - Delete
testing 123	15 Jul, 2011	31 Jul, 2011	John Smith	Edit - Delete

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



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

Hubbis > Learning plans

Selected courses

- Capital protected products 2012
- AML - Malaysia 2012
- AML - Hong Kong 2012

Add a new plan > Select courses (Step 1)

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.

Back to learning plans **Proceed to Step 2**

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):

Search

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	11 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"/>

Add/Edit My Learning

Bookmarks

Learning Plans

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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



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

[!\[\]\(be7c8fb4b6c199f9be4185268cade364_img.jpg\) Home](#)
[!\[\]\(ab5cc2937fcdef7a82fda296b20dcce9_img.jpg\) Courses](#)
[!\[\]\(33f2edf4cc655181243f8f6078222f4e_img.jpg\) hubbis.com](#)

[Hubbis > Learning plans](#)

Site Administration

- Reports
- Team admin


Add/Edit My Learning


Bookmarks


Learning Plans


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Select users

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.

Users

- John Doe
- Jane Smith
- Bob Johnson
- Sarah Williams
- David Brown
- Emily Green
- Michael White
- Amy Black
- Kevin Blue
- Laura Grey

>>

<<

Selected users

- John Doe
- Jane Smith
- Bob Johnson
- Sarah Williams
- David Brown
- Emily Green
- Michael White
- Amy Black
- Kevin Blue
- Laura Grey

Plan details

Plan name	Learning plan 1
Plan description	Learning plan 1
Deadline	31/05/2012 
Reminder send before	29/05/2012 

Create this Plan

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	---	11 May, 2012

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Edit learning plan

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

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

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

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Selected courses

- Capital protected products 2012 [X](#)
- AML - Malaysia 2012 [X](#)
- AML - Hong Kong 2012 [X](#)

Site Administration

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- [Team admin](#)

 **Add/Edit My Learning**

 **Bookmarks**

 **Learning Plans**

 **What's New**

 **Help**

Edit Learning Plan

Plan name: Learning plan 1

Plan description: Learning plan 1

Deadline: 31/05/2012

Reminder send before: 29/05/2012

Send notification to all selected users?

Created by: [Redacted]

[Update this plan](#)

[Edit selected users](#)

[Edit selected courses](#)

Change selected users.

You are logged in as [REDACTED] ([Logout](#))

[!\[\]\(0c960be1d8eb5c895b7cfaefee87832a_img.jpg\) Home](#) [!\[\]\(80335a63fee2473f73a56a7eeec73bb7_img.jpg\) Courses](#) [!\[\]\(629054d8fa2878d1979526f1a73b671f_img.jpg\) hubbis.com](#)

[Hubbis > Learning Plans](#)

[Back to learning plans](#)

Selected courses

Capital protected products 2012	X
AML - Malaysia 2012	X
AML - Hong Kong 2012	X

Edit Learning Plan

Edit selected users

Unselect user

Selected user

[Edit selected courses](#)

Add/Edit My Learning

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Add / delete selected courses.

Selected courses

- [Capital protected products 2012](#) X
- [AML - Malaysia 2012](#) X
- [AML - Hong Kong 2012](#) X

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- [Team admin](#)

 **Add/Edit My Learning**

 **Bookmarks**

 **Learning Plans**

 **What's New**

 **Help**

 **Feedback**

You are logged in as [REDACTED] ([Logout](#))

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 hubbis.com

[Hubbis > Learning Plans](#)

[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	<input type="text" value="All categories"/>
Course level	<input type="text" value="All levels"/>
Course type	<input type="text" value="All types"/>
Job function	<input type="text" value="All job functions"/>
Topics	<input type="text" value="All topics"/>
Recent courses (last 3 months)	<input type="checkbox"/>

■ 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	11 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"/>

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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.

You are logged in as [REDACTED] ([Logout](#))

[!\[\]\(8049c40dca7516f2acb55efdbab1427a_img.jpg\) Home](#) [!\[\]\(9bb0eeabfc64b565058b9428271cdf15_img.jpg\) Courses](#) [!\[\]\(f159d9550cba63c9a191c936a406412a_img.jpg\) hubbis.com](#)

[Hubbis > Learning Plans](#)

[Back to learning plans](#)

Learning plan details

Plan name	Learning plan 1
Plan description	Learning plan 1
Deadline	31 May, 2012
Created by	[REDACTED]
Certified Programme - Title	[REDACTED]
Certified Programme - Description	[REDACTED]

[Selected users](#)

[Selected courses](#)

[Learning plan status by users](#)

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- [Team admin](#)

Add/Edit My Learning

 Add/Edit My Learning

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View selected users.

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

[!\[\]\(fe176d1eb6c3abc279c3205737b8c15d_img.jpg\) Home](#) [!\[\]\(70504f5c516bdc6a849cee9001a41321_img.jpg\) Courses](#) [!\[\]\(228df832036bf4a24e5b42e2ec0b2d0a_img.jpg\) hubbis.com](#)

[Hubbis > Learning Plans](#)

[Back to learning plans](#)

Site Administration

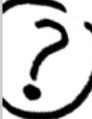
- [Reports](#)
- [Team admin](#)

 [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 [REDACTED] ([Logout](#))

[!\[\]\(ca438df2c6b32a99f967c8e131a97780_img.jpg\) Home](#) [!\[\]\(8a482f7d703b2f3a21bcbafdaced4511_img.jpg\) Courses](#) [!\[\]\(b8cfa9474de969a8f1ab00018de932d4_img.jpg\) hubbis.com](#)

[Hubbis > Learning Plans](#)

[Back to learning plans](#)

Learning plan details				
Selected users				
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	---	11 May, 2012

[Learning plan status by users](#)

 **Add/Edit My Learning**

 **Bookmarks**

 **Learning Plans**

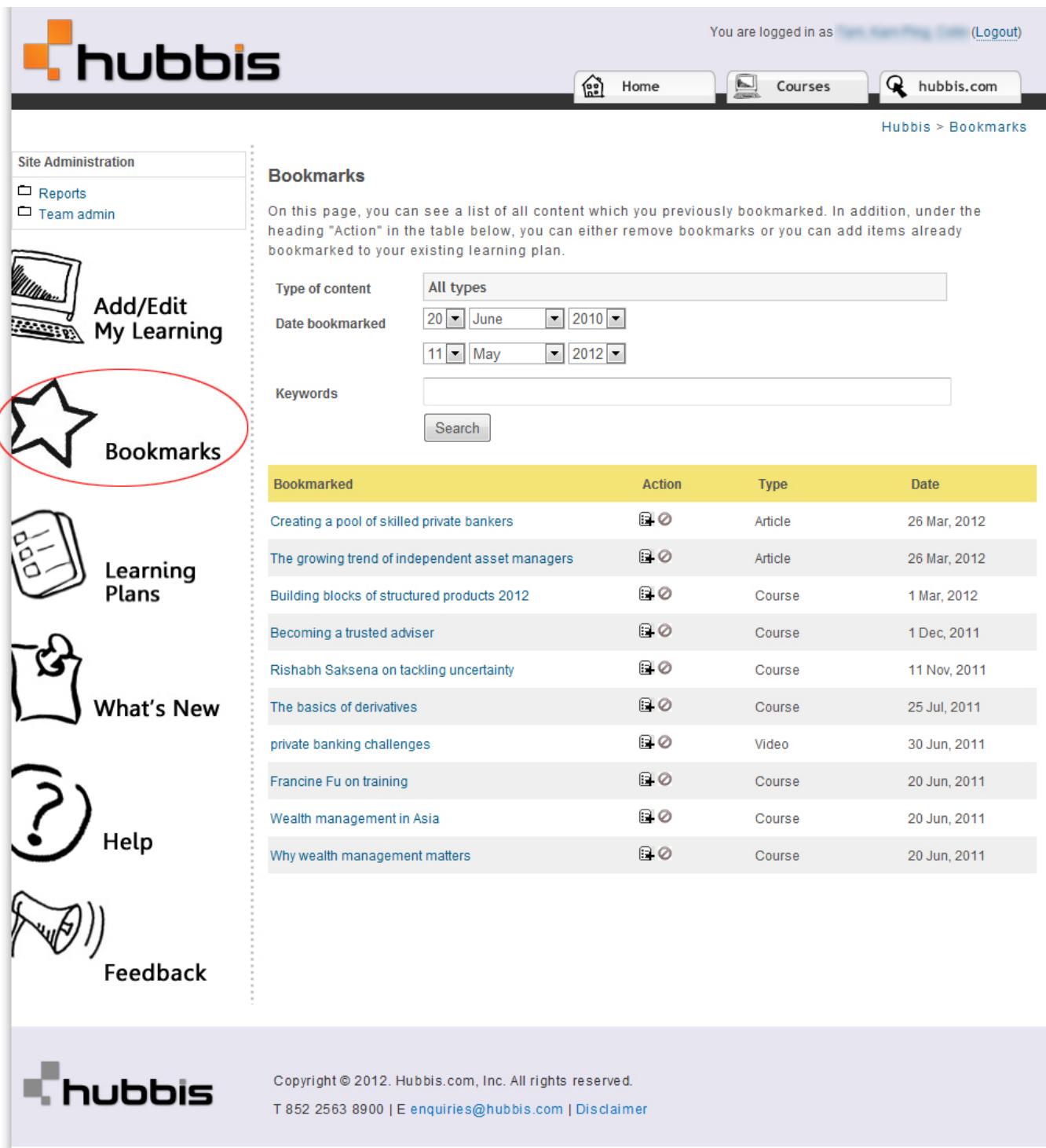
 **What's New**

 **Help**

 **Feedback**

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.



The screenshot shows the hubbis website interface. On the left, there's a sidebar with icons for 'Add/Edit My Learning', 'Bookmarks' (which is circled in red), 'Learning Plans', 'What's New', 'Help', and 'Feedback'. The main content area has a header 'Bookmarks' and a search form. Below that is a table showing a list of bookmarked items with columns for 'Bookmarked', 'Action', 'Type', and 'Date'.

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

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

Date bookmarked

Keywords

Bookmarked

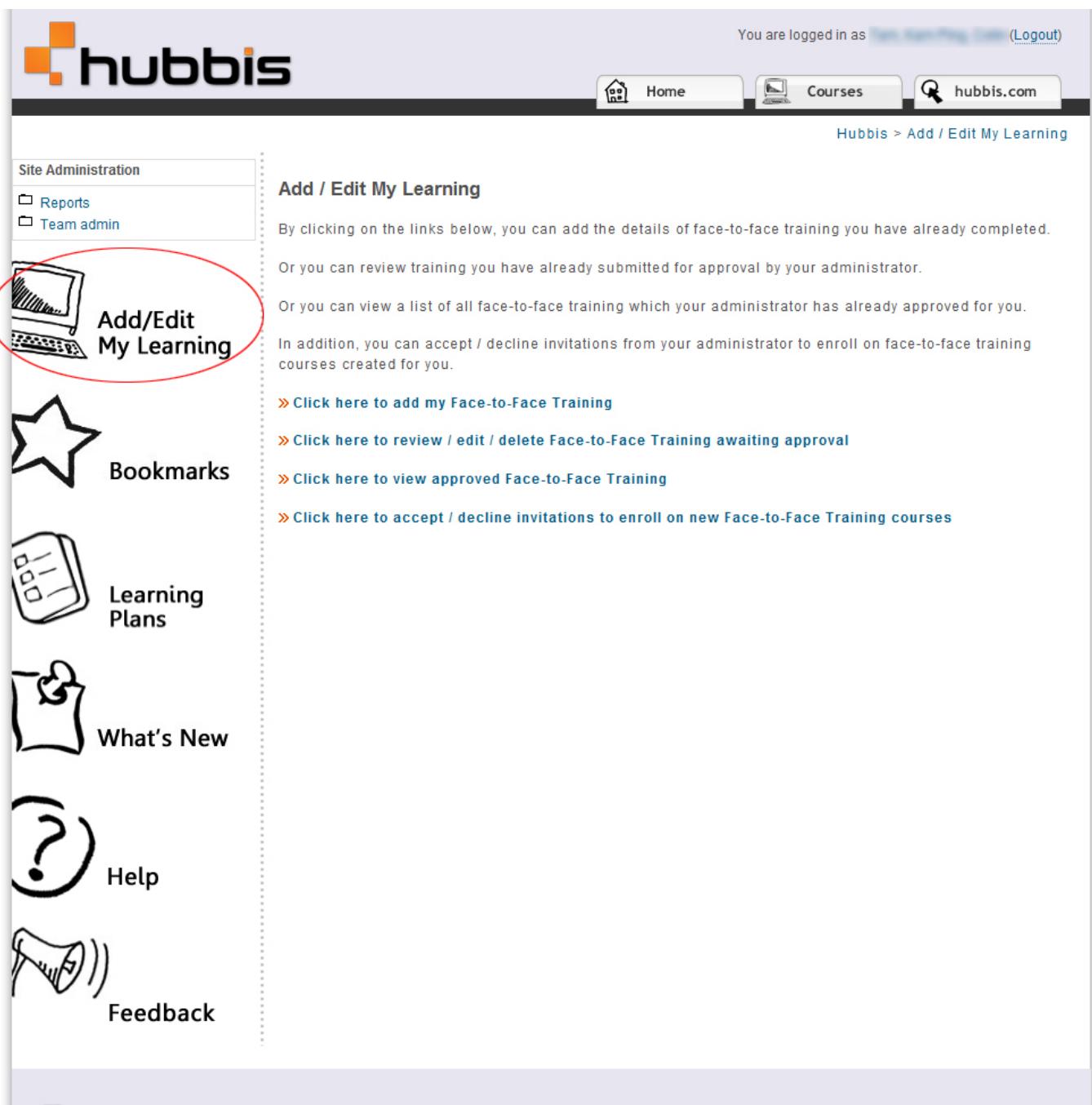
Bookmarked	Action	Type	Date
Creating a pool of skilled private bankers		Article	26 Mar, 2012
The growing trend of independent asset managers		Article	26 Mar, 2012
Building blocks of structured products 2012		Course	1 Mar, 2012
Becoming a trusted adviser		Course	1 Dec, 2011
Rishabh Saksena on tackling 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

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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.



The screenshot shows the hubbis platform interface. At the top, there is a navigation bar with the hubbis logo, a user status message "You are logged in as [username] (Logout)", and links for "Home", "Courses", and "hubbis.com". Below the navigation bar, the main content area has a title "Add / Edit My Learning". To the left, there is a sidebar with links for "Site Administration" (Reports, Team admin), "Add/Edit My Learning" (circled in red), "Bookmarks", "Learning Plans", "What's New", "Help", and "Feedback". The "Add/Edit My Learning" section contains text explaining its purpose and several blue hyperlinks: "Click here to add my Face-to-Face Training", "Click here to review / edit / delete Face-to-Face Training awaiting approval", "Click here to view approved Face-to-Face Training", and "Click here to accept / decline invitations to enroll on new Face-to-Face Training courses".

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

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

[!\[\]\(c751cb6741e1e0318ba9852832e07ff9_img.jpg\) Home](#) [!\[\]\(a38c897b15b546b1da0605aab96c93f1_img.jpg\) Courses](#) [!\[\]\(909b96b7db47b2714cb8619778c59a85_img.jpg\) hubbis.com](#)

[Hubbis > What's New](#)

Site Administration

- [Reports](#)
- [Company admin](#)
- [Team admin](#)

Add/Edit My Learning

Bookmarks

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What's New

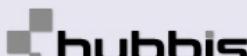
Click on each of the dates below to view the updates and enhancements we have made to the training platform - both in terms of the functionality and content.

» 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](#)

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