This Quick Reference Guide shows how to:

- View a Snapshot of your accreditation progress
- View your Training Plan
- View the Competencies you have demonstrated
- Update your Personal Details
- Record any Continuing Education you have completed
- Record your Formal Qualifications
- View your Training Log
- Contact your administrator for assistance.
- Retrieve a forgotten password.
What is webLMS?

webLMS is an on-line assessment, training and record management system designed to meet the business and regulatory requirements of financial services organisations.

webLMS is used by banks, fund managers, life insurance and financial planning organisations to manage authorisation, training, accreditation and continuing education.

webLMS is a training portal where you can access on-line assessments and training and record other training created by your organisation.

webLMS functions are accessed through a standard web browser and require no additional software to access any system functions.
Accessing webLMS for the first time

To access the application, you will first need to be registered on webLMS.

Registration is completed by your system administrator who will provide you with your User Name and Password.

1. Click in the address bar and type in the following address www.webLMS.net
   The webLMS :: Sign in screen will load.

2. Type in your user name and password and click on Sign in.
   The My Details tab will display see (figure 1).
   • links to your training and personal details on the left side of the page ➊.
   • information added by your administrator and a summary of your contact details ➋.
     (These details can be updated by clicking on the link ‘edit details >>’ ➌.)
   • Links to training or assessments you need to complete ➍.

![Figure 1](image)

**Note:** When you access webLMS for the first time you are prompted to change your password.

3. Click on the link under ‘Security Alert’ and change your password.
Tip:

Passwords and PINs are a weak link in any security systems. We recommend you follow these simple steps to stay secure:

- don’t use obvious or easily-guessed words or numbers
- try to avoid obvious password choices like your partner, immediate relative or pet’s name, a birthday or anniversary.
- write them down where nobody can find them, and they most certainly shouldn’t be stored on or near your computer

Complex passwords can be difficult to remember. One suggestion from the Australian Consumers Association is to invent a nonsense word, like jublerock, then alter it by adding numbers to make it more secure: jubl3rOck

✔ a good password might look like this:

3xampl3

(the word “example” with the letter “e” substituted with the number “3”)

✘ a bad password may look like this “john12”.

Most password detection methods would crack this password quickly.

You may be prompted to change your password from time to time depending on the Security implemented. Certain words e.g. ‘password’ are not allowed, other security options include

1.) A minimum password length

2.) Forcing Passwords to be changed every 30 days

3.) Restrictions on the re-use of previous passwords.
Retrieving Your Password

The Sign in screen, accessed at www.webLMS.net has a link titled Forgotten your Password.

This function will generate an email with your password details and send them to your e-mail address stored on webLMS.

To retrieve your password:

1. Complete the form with your first name, last name and the e-mail address stored on webLMS.
2. Press submit
3. An e-mail is sent immediately.

The next time you sign in you will be prompted to change your password.

You will get an error message if webLMS cannot match all three pieces of data. If you cannot generate a password, contact your administrator for assistance.

When you contact your administrator, you should confirm the first name, last name and email address recorded in webLMS.

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Note: webLMS will not forward a password to any e-mail address other than that recorded in your personal details.
Your Training Record

Once you have signed in and updated your password you can proceed to access your records.

On the left hand side of the screen a list of options is displayed. (Figure 2)

By clicking on the underlined words, you are able to access each section of the application.

Once you are in a section, the **Home** button to return to your Home page.
Snapshot (Optional)

Snapshots may not be available to all users. Where Snapshots are available, they will be displayed under the **My Records** heading.

To access your training records click on the Snapshot link. The Snapshot page contains three tabs, Snapshot, Detailed Snapshot and Student Notes. (Figure 3)

**Snapshot Tab**

This is a **summary** grid displaying any accreditation that your role can complete together with any pre-requisites related to that accreditation. Training available is listed on the left hand side of the screen.

This summary grid is useful to see what training you need to complete to become accredited in a particular area.

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**Note:** Any prerequisites for accreditation display in the grid as an icon. This icon will change depending on its status. A tick means it is completed or you are accredited.
**Detailed Snapshot Tab**

This tab displays additional detail including the accreditation, training results and dates each was completed or achieved.

**Student Notes Tab**

Student Notes contains entries added to the system as a result of:

- updates to your records,
- amendments to your Authority Level or
- reset of your Securities Password by an administrator.

**Competencies**

This page identifies those competencies required for your role and if they are demonstrated.

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**Tip:** By clicking on any of the competencies you can view additional detail.

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**Training Plans (Optional)**

You can view your training plan, together with a breakdown of your training, for the business year-to-date for your organization.

You can also view your progress toward the completion of any training objectives and details of your accumulated Continuing Education Hours (CE Hours) or Continuing Education Points (CE points)

**Certificate**

Some training you complete will generate certificates.

These Certificates can be viewed and printed within this function
Training Log

Your training log is a list of training added to your records. Entries will be added to your training log following:

- entries you make to your Continuing Education Records
- updates to your training records, which are made when you complete an on-line exam.
- updates to your records made by an administrator after you have completed some training.
Updating and amending records

webLMS allows you to manage and update your own information on-line. This information includes amending your Personal Details, updating your Continuing Education and Formal Qualifications as well as changing your Securities Password.

Personal Details (Optional)

Personal Details Tab

1. To update your personal records such as address or contact numbers, click on the Personal Details link on your homepage.

![Personal Details Tab](Figure 4)

2. Type the new information into the relevant fields.

3. Click the **Submit Changes** button and the bottom of the screen.

**Note:** This information may need to be checked by an administrator before the information is accepted and updated.
Authority Tab (Optional)

Letters of Authority are designed to address the Australian Financial Services Licence requirement to inform representatives

- what authority they have and;
- any restrictions to the financial services they may provide.

(Figure 5)

Letters of Authority are archived in this tab. You can view your Letter of Authority by selecting the letter you want to print.

Each Letter is a PDF file that can be displayed and printed but cannot be edited.
Accreditation Tab (Optional)

The Accreditation required for an individual is usually based on their Role. In some cases, more flexibility is required.

Use the Accreditation Tab to request an exemption or an extension to the Accreditation available. An administrator will approve or reject requests using an administration function.

(Figure 6)

Exemptions

If you are exempt from completing a particular accreditation, your name will not display in any accreditation reports generated by an administrator, until the exemption expires.

People going on extended leave typically seek exemptions.

Extensions

In some cases there may be reasons to extend the Accreditation available to someone beyond that normally required for their role.

You can apply for an accreditation extension. Decisions to extend an authorisation are normally made by an administrator in consultation with your manager.

If an extension is approved it will display in your Snapshot with the associated training.
Continuing Education

You are able to record any training and education you have undertaken in your own time. Typically this will comprise unstructured training, study or reading.

To update your continuing education, click on the Continuing Education link.

Adding a New Record

1. Click on Add New Activity. A screen similar to Figure 7 below will appear.

2. Enter the details into the appropriate fields.

3. Click on Save.

Note: When entering Continuing Education information you need to enter details about the training including:

- the time the activity took to complete
- the competency that the activity related to
- if you are entering CE numbers that number and any associated reference numbers.
Amending an Existing Record

If the status of one of your activities changes, you can quickly update any record.

1. Click on the Activity to be updated. (Figure 8)

   ![Scheduled Continuing Education](image)
   ![Completed Continuing Education](image)

   (Figure 8)

2. Amend the details that appear in the form.

3. Click on **Save**.
Formal Qualifications

Formal Qualifications are tertiary level studies such as Certificates, Diplomas or other study you have completed. You can record each formal qualification, either using the ASIC list of approved courses or adding other courses.

This information can be updated at any time by clicking on the course you wish to update.

Adding and editing completed course information

1. Click on the Formal Qualification link. A screen similar to one below (Figure 9) will appear.

(Figure 9)

2. Click on Add Course (or Choose from the ASIC Register if you are adding a course which demonstrates a PS146 Competency.)

(Figure 10)
3. Add the course details in the appropriate fields. (If you choose a course from the ASIC Register of Courses course details will be added automatically, you still need to add the status and course dates)

4. Click on **Save External Study**.

**Note:** You can also record your formal qualification using the ASIC Register. This registry lists all approved courses and is updated weekly.
Securities Register

In order to provide privacy, a password to your Register of Securities can be different to the Login Password. This password is administered by you and is not available to the Administrator.

If you forget your password you can contact your Administrator to reset your password to the one you use to access the Homepage. If your password is reset a note will be added to your Student Notes together with the name of the person who reset your password.

Updating Your Securities Register

Your Securities Register follows the same format as the ASIC Form 715J. Refer to your compliance manager if you have any questions concerning the information you are required to maintain in this register.

Changing your Securities Register password

1. Click on the Securities Register link on the Homepage.

2. Enter your old password to confirm your identity together with the new password in the fields provided.

3. Click on Submit to complete the operation and gain access to your Securities Register.
Administration

Contact Your Administrator

If you have any questions about the information in your database such as the courses you have completed, competencies or any other information related to your records, click on the Contact Your Administrator link.

Your administrator's contact details will display.

Change Your Login Password

At times you may want to change your password.

1. To change your login password, click on the Change Your Password link
2. Enter your existing password.
3. Click on the Verify button.
4. If you have entered the correct password, a screen similar to Figure 12 will appear.
5. Complete the details and save your new password

(Figure 12)

(Figure 13)
Logoff

To logoff the system, click on the link, **Click here to logoff** and you will be logged off.

**Note:** If you are inactive for more than 30 minutes you will automatically be logged off and you will have to sign in again to continue using webLMS.