



HKSI Institute Desktop eCourse User Guide

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Check Your Computer Capability

For launching all eCourses, you are suggested to use laptop/desktop with Google Chrome and DO NOT use iPad and any devices with Safari as there might be issues in tracking completion.

- The following table details the recommended settings to run the eCourses. It also lists your computer settings as they have been automatically detected.

This table details the recommended minimum settings to run this product. If your computer does not meet any of the recommended settings or you have issues with accessing any areas of the product, please contact your IT Administrator.

	Recommended Minimum
Browser:	Chrome (Latest version), Firefox (Latest version)
Operating System:	Window 2000 or above
Screen Height and Width:	H:768 W:1024
Screen Color Depth:	16 bit or higher
JavaScript Version:	1.3
Popup Window Status:	Popup windows enabled

- If your computer does not meet some of the recommended settings, please contact your IT Administrator.

HKSI Institute Online Portal

Go to Login Page <https://login.hksi.org/login> and login your account (using username and password)

HKSI Institute
Access. Learn. Progress.

User Name

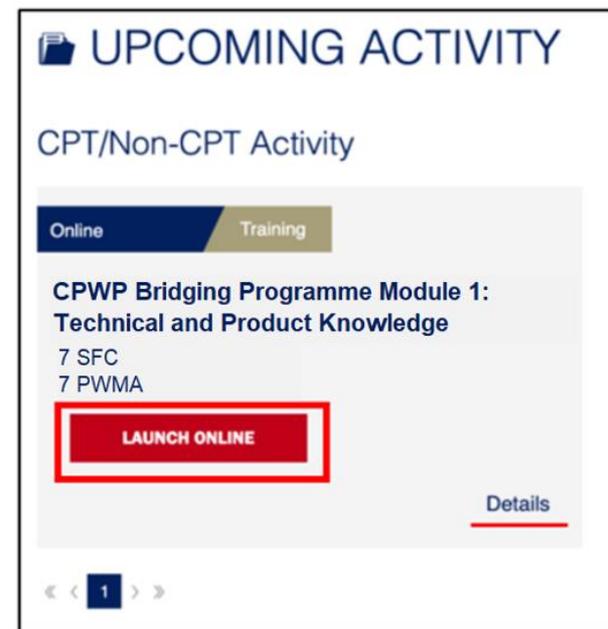
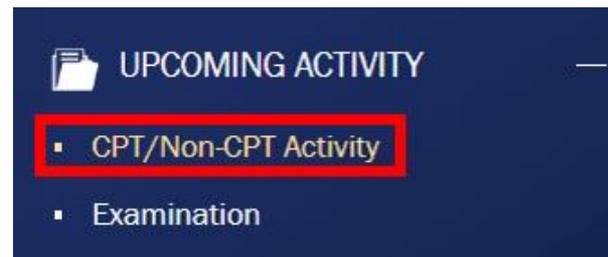
Password

[Forgot username/password?](#)
[Activate/Create account](#)

LOGIN

View the enrolled course on HKSI Institute Online Portal

1. Click on "**CPT/Non-CPT Activity**" under "**UPCOMING ACTIVITY**"
2. Click on "**Details**" to view the course details (i.e., expiry date)
3. Click on "**Launch Online**" to complete the course



Learning Management System Homepage

HKSI Hong Kong Securities and Investment Institute
香港證券及投資學會

Advanced Learning Platform

Home Article **Learning** Online Portal

search courses...

Course Catalogue
Recommended Course
Enrolled Course
Videos
My Schedule

View & launch your eCourses by clicking the "Enrolled Course" under the "Learning" tab

Please refer to next page

Completion deadline: Until 2023-06-19 23:59:59
Status: In progress

Content Course details My status

View Courses

View your "in progress" courses

The screenshot displays the 'Online Portal' section of the HKSI website. The navigation bar includes 'Home', 'Article', 'Learning', and 'Online Portal', with a search bar on the right. The 'Enrolled courses' section is highlighted, showing a course titled 'CPWP Bridging Programme Module 1: Technical and Product Knowledge' with a progress bar and a 'Last visit' of '--'. Two other course slots are shown with the text 'No course 暫無課程'.

Home Article Learning Online Portal search courses...

Welcome,
Last login: 2023-03-02 14:01

Enrolled courses More

CPWP Bridging Programme Module 1:
Technical and Product Knowledge
👍 29 🕒 2023-03-02
Progress:
Last visit: --

No course
暫無課程

No course
暫無課程

Launch Content

This is the course title

This is the course status, make sure this is "Completed"

This is the module title. Click the title to launch the module (An eCourse may consist of more than one module)

This is the module status, make sure this is "Completed" or "Passed"

This status will be marked as "Completed" when you completed/passed all modules

This status will be marked as "Completed" or "Passed" when you fulfil the module completion criteria.

Please refer to next page

Home Article Learning Online Portal search courses...

CPWP Bridging Programme Module 1: Technical and Product Knowledge

Type: eLearning course Completion deadline: Until 2023-06-19 23:59:59
CPT Hour: 7.0 Status: In progress

Description: This part of the programme is offered by the Hong Kong Securities and Investment Institute (HKSI Institute) with 5 topics in an eCourse... [More](#)

My status

Name	Last Access Date	Best score	Status
Topic 1: Basic Products	--	--	Not started

This topic covers the basic features and types of non-vanilla bonds, bond yield, equity returns by share types, FX spreads, spot and forward rates, FX carry trade and banknote dealing.

Maximum score: 100 Passing score: 80
Minimum learning duration: 0 min(s)

View Learning History

Content

Course details

My status

Name	Last Access Date	Best score	Status
Topic 1: Basic Products	--	--	Not started 
<p>This topic covers the basic features and types of non-vanilla bonds, bond yield, equity returns by share types, FX spreads, spot and forward rates, FX carry trade and banknote dealing.</p> <p>Maximum score: 100</p> <p>Minimum learning duration: 0 min(s)</p> <p>Passing score: 80</p>			

Check your score,
please ensure you
achieve "80"

My Status

In the My status tab, check your completion criteria and make sure you complete all modules.

Content Course details **My status**

Progress : In progress

Completion criteria

Engagement requirement

Title	Requirement	Status
Topic 1: Basic Products	Complete/Pass it	✓
Topic 2: Derivatives and Structured Products	Complete/Pass it	✓
Topic 3: Investment Funds and Alternative Investments	Complete/Pass it	✓
Topic 4: Portfolio Management	Complete/Pass it	✓
Topic 5: Lending and Leverage	Complete/Pass it	

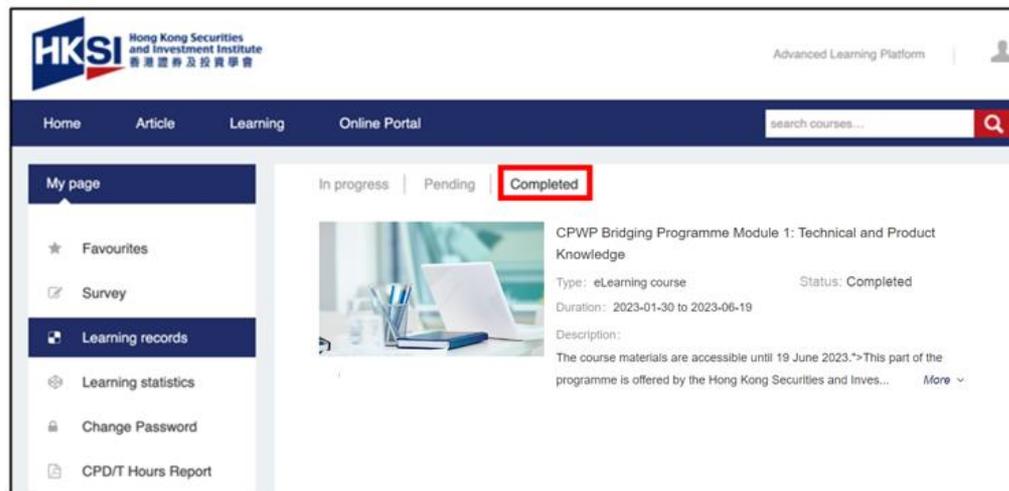
(✓ Fulfilled)

**Check your
completion
criteria**

Make sure all ✓

Check Attendance Record on HKSI Institute Online Portal

1. After you clicked **“Completed”**, you can view the completed course. (Below is an example.)



2. Click **“Online Portal”**, go back to Online Portal to check Attendance Record

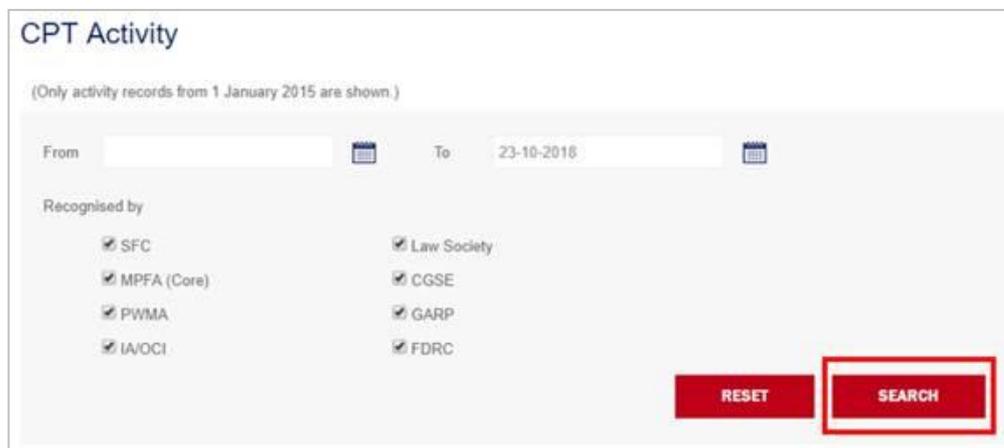


Download CPT Attendance Record on HKSI Institute Online Portal

1. Click on “**CPT Activity**” under **RECORD**



2. Click on **SEARCH** button to view the activity records, please indicate to your completion date in the calendar and then press “**Search**”

A screenshot of the 'CPT Activity' search interface. At the top, it says '(Only activity records from 1 January 2015 are shown.)'. Below this, there are two date input fields: 'From' and 'To'. The 'To' field is filled with '23-10-2018'. Underneath, there is a section titled 'Recognised by' with two columns of checkboxes. The first column includes SFC, MPFA (Core), PWMA, and IA/OCI. The second column includes Law Society, CGSE, GARP, and FDRC. At the bottom right, there are two red buttons: 'RESET' and 'SEARCH'. The 'SEARCH' button is highlighted with a red rectangular box.

3. In the search results, locate the course and click “**Print**” to print the certificate. (Below is an example.)



Training	Anti-Money Laundering	22-10-2018	1 SFC 1 PWMA	Print
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Support

If you have encountered technical problems or you have any enquiries, please contact us at:

- Tel: **+852 3120 6100** (Education & Development Department)
- E-mail: **education@hksi.org**