



# **HKSI Institute CPWP Bridging Programme Module 1 User Guide**

## Introduction

- Check Your Computer Capability
- HKSI Institute Online Portal
- View the enrolled course on HKSI Institute Online Portal
- Learning Management System Homepage
  - ▶ View Courses
  - ▶ Launch Content
  - ▶ View Learning History
  - ▶ My Status
- Check Attendance Record on HKSI Institute Online Portal
- Download CPT Attendance Record on HKSI Institute Online Portal
- Access and Review Completed Content on LMS
- Support

## 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.

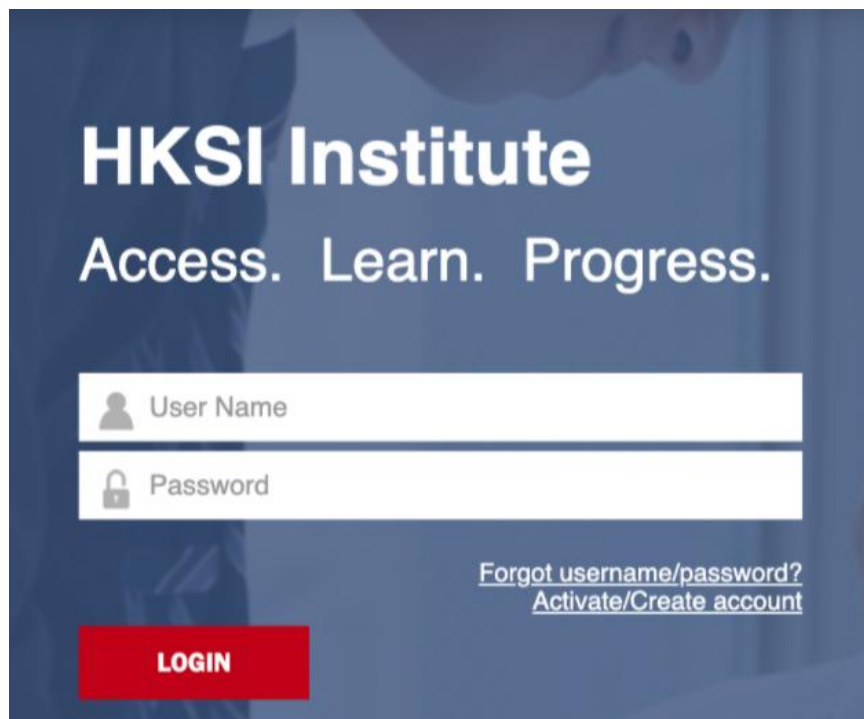
This table details the recommended minimum settings to run this product. If your computer does not meet any of the recommended settings or you have issues with accessing any areas of the product, please contact your IT Administrator.

	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

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

search courses...

Bridging  
learning course  
Completion deadline: Until 2023-06-19 23:59:59  
Status: In progress  
This part of the programme is offered by the Hong Kong Securities and Investment Institute (HKSI)  
with 5 topics in an eCours... [More](#)

Like(0) Favourites(0)

Content Course details My status

## View Courses

View your "in  
progress" courses

The screenshot displays the HKSI Online Portal interface. At the top, a dark blue navigation bar contains the links 'Home', 'Article', 'Learning', and 'Online Portal', along with a search bar labeled 'search courses...' and a magnifying glass icon. Below the navigation bar, the 'Enrolled courses' section is visible. On the left, a welcome message reads 'Welcome, Last login: 2023-03-02 14:01'. The main content area shows a list of enrolled courses. The first course, 'CPWP Bridging Programme Module 1: Technical and Product Knowledge', is highlighted with a red rounded rectangle. It includes a thumbnail image of a laptop and pens, a heart icon with the number '29', a clock icon with the date '2023-03-02', a progress bar, and the text 'Last visit: --'. To the right of this course, there are two placeholder cards with the text 'No course' and '暫無課程' (No course available) over a background image of books and a pen.

Home Article Learning Online Portal search courses... Q

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" or "Passed" 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
<a href="#">Topic 1: Basic Products</a>	--	--	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>			

Check your score,  
please ensure you  
achieve "80"

Passing score: 80

## My Status

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

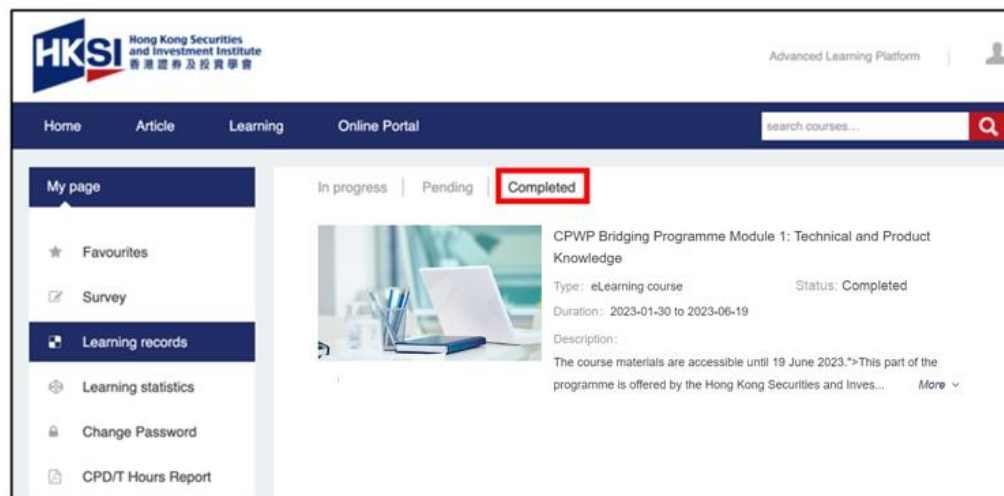
Content Course details <b>My status</b>		
Progress : <div><div></div></div> In progress		
Completion criteria		
Engagement requirement		
Title	Requirement	Status
Topic 1: Basic Products	Complete/Pass it	✓
Topic 2: Derivatives and Structured Products	Complete/Pass it	✓
Topic 3: Investment Funds and Alternative Investments	Complete/Pass it	✓
Topic 4: Portfolio Management	Complete/Pass it	✓
Topic 5: Lending and Leverage	Complete/Pass it	
		( ✓ Fulfilled )

**Check your  
completion  
criteria**

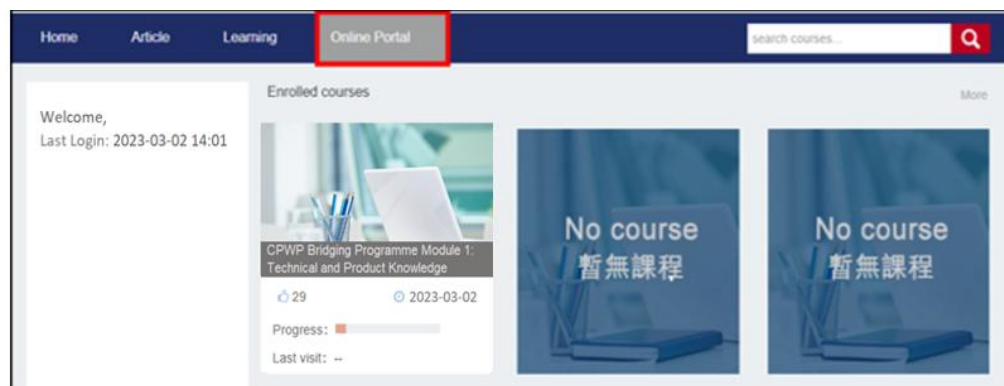
Make sure all ✓

## 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 form. At the top, it says '(Only activity records from 1 January 2015 are shown.)'. Below this, there are two date pickers: 'From' and 'To'. The 'To' date is set to '23-10-2018'. Under the heading 'Recognised by', there are two columns of checkboxes, all of which are checked: SFC, MPFA (Core), PWMA, IA/OCI, 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	<b>Print</b>
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## Access and Review Completed Course on LMS

- 1, After completing the eCourse, you can still review the content of the course within the access period. Login to online portal (<https://login.hksi.org/>) Click on “**CPT Activity**” under **RECORD**

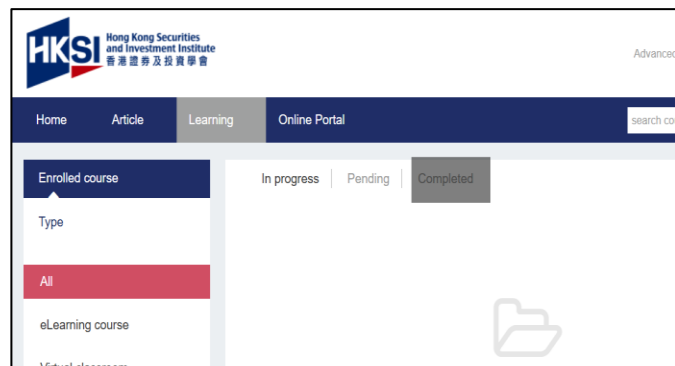


2. Scroll down to the bottom of the screen and click on “eCourses/eSeminars” to be redirected to the LMS page

Review your completed [eCourses/eSeminars](#) before the access period expiry date

## Access and Review Completed Course on LMS (Cont.)


- Once on the LMS, if you have completed all the enrolled courses, the Enrolled courses page will appear blank. To proceed, click “**Enrolled Course**” under Learning. Then, go to the **Completed** tab to view and access the courses that you have completed.



## Access and Review Completed Course on LMS (Cont.)

- Once the course has been completed on the LMS, the course link will be inaccessible.
- To review the completed content:

Under “**Content**”, click the “**Review**” button next to the Learner Report for each module. Locate the “For Revision Purposes” version and click “**Review**” to revisit any part of the eCourse.

Name	Last Access Date	Best score	Status
Topic 1: Basic Products	2025-05-24 16:16:20	100	Passed 
<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                      Passing score: 80</p> <p>Minimum learning duration: 0 min(s)</p> <div> <span>Review</span> <span>Learning report</span> </div>			

## Support

If you have encountered technical problems or you have any enquiries, please contact us at e-mail: [education@hksi.org](mailto:education@hksi.org)

