



**香港財務策劃師學會**  
INSTITUTE OF FINANCIAL PLANNERS OF HONG KONG

**FP Learning**

**User Manual (Learner)**

**Institute of Financial Planners of Hong Kong**

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**[Updated on August 2022]**

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## Flow Chart of FPLearning Platform

### 1. Introduction to the Learner Manual

- Please read the **Important Notes\*\*\*** before enrollment
- You may refer to this user manual for details if needed

### 2. About FPLearning

- Click the FPLearning Access Link

### 3. Account Registration & Login

- Register an account with your HKID number and your email address saved **under IFPHK member profile\***  
\*Only for IFPHK member or those who have taken IFPHK e Course
- Please activate your account in **24 hours**

### 4. FPLearning System Layout

- Change your preferred setting

### 5. Course Enrollment

- Enroll in a course within **24 hours** by credit card after account activation
- An **email confirmation** will be sent to you once **payment is successful**

### 6. Online Learning

- Complete the course in **14 days (\*7 days for promotional courses)** from the **date of enrollment**
- You should view **videos**, finish **mini-quizzes**, **final assessment** and **evaluation form**
- The system will check your attendance regularly via the **two-factor authentication**

### 7. Course Completion

- Print / save the electronic certificate from the system as your record
- IA eCPD certificate and receipt will mailed to your corresponding address in two months (if applicable)

If you have any issues, please send us your queries at [training@ifphk.org](mailto:training@ifphk.org) with personal details and screenshots of the issue, or call 2982 7867 at office hour

**\*\*\*Important Notes:** <http://bitly.ws/vmY2>

**\*\* Note to IFPHK Members: CE coupons are not applicable in FPLearning platform.**

**Thanks for your attention!**

## 1 Training Manual Introduction

This user manual contains all essential information for the users to fully use our FPLearning Platform. This manual includes the step-by-step procedures for accessing and using the system. All procedures have provided detailed screen shots and steps to enhance users' understanding of the platform functions.

**Participant are advised to study this manual carefully**

**before accessing the FPLearning Platform**

## 1.1 System Requirement

To help you having an exceptional experience in our FPLearning platform, you are recommended to check whether your device meet with the system requirement:

<p><b>1. <u>Computer Requirements</u></b>          Operating System: Windows 10, Mac OS X 10.5, Ubuntu 11.04 or above          Computer memory recommended more than 4G memory          Link:  <a href="https://www.ifphk.org/enrollment/elearning/en_elearning_main.aspx">https://www.ifphk.org/enrollment/elearning/en_elearning_main.aspx</a></p>	
<p><b><i>Browser Version:</i></b></p> <ul style="list-style-type: none"> <li>● Safari v6.0 or above</li> <li>● Firefox v40 or above</li> <li>● Chrome v40 and above</li> <li>● Edge v80 and above</li> </ul> <p>No plug-ins are required</p>	<p><b><i>Browser Settings:</i></b></p> <ul style="list-style-type: none"> <li>● Allow Javascript</li> <li>● Allow Cookies</li> <li>● Allow pop-up windows</li> </ul>
<p><b>2. <u>Tablet and Mobile Requirements</u></b>          Operating System: iOS 9.0 or above, Android 4.4 or above          Link:  <a href="https://www.ifphk.org/enrollment/elearning/en_elearning_main.aspx">https://www.ifphk.org/enrollment/elearning/en_elearning_main.aspx</a></p> <p style="text-align: center;">Important:  <b>Please be reminded that the electronic certificate will only be available in the computer.</b></p>	
<p><b><i>Screen Size:</i></b></p> <ul style="list-style-type: none"> <li>● 4.3 inches or more</li> </ul> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>● In order to achieve the best experience, it is recommended to use on phones with a screen of 5.0 inches or more</li> </ul>	

## 2 About FPLearning

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FPLearning provides an online learning solution to IFPHK's training courses. IFPHK members and anyone working in the financial service industry can easily schedule their professional learning and accumulate CPT/eCPD hours. The "FPLearning" platform allows selected video-recorded seminars to be viewed with any smart device anytime, anywhere.

### Features:

- A wide array of topics, delivered by professionals and experts, at your fingertips
- Pay and watch simultaneously 24/7
- Watch anytime at your own pace
- Receive CE/CPT/CPD hours and Certificates right after completion
- Tablet Friendly

### Our Website:

[https://www.ifphk.org/enrollment/elearning/en\\_elearning\\_main.aspx](https://www.ifphk.org/enrollment/elearning/en_elearning_main.aspx)

### Notice:

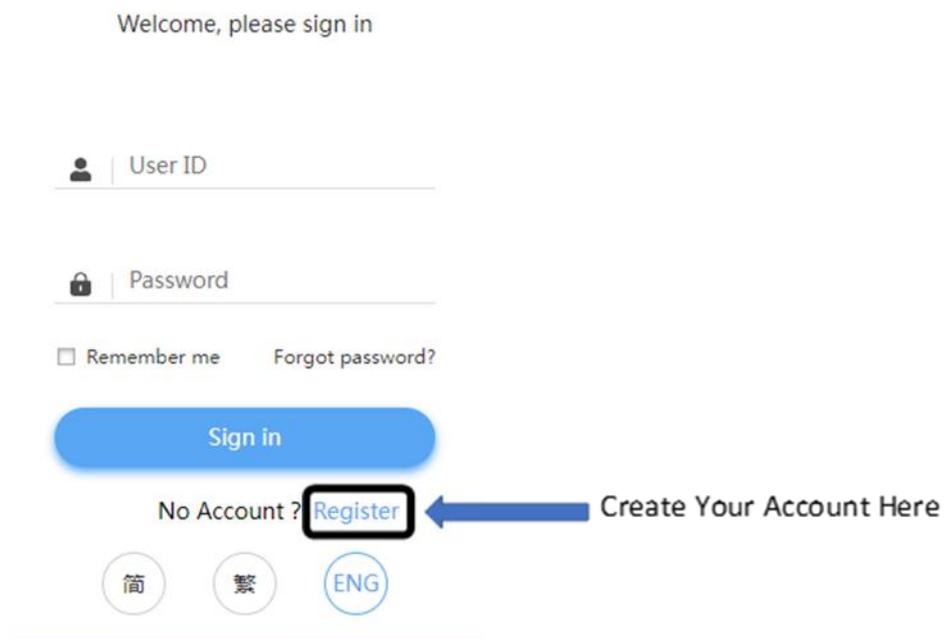
**The platform is only used for one time assess to e-Courses.**

Below are the quick steps to help you familiar in FPLearning Platform:

### 3 Account Registration and Login

#### 3.1 Account Creation

**Step 1:** To access the course, you must create an account by clicking “**Register**” from the website as shown below.



Welcome, please sign in

User ID

Password

Remember me    [Forgot password?](#)

Sign in

No Account? **Register** ← Create Your Account Here

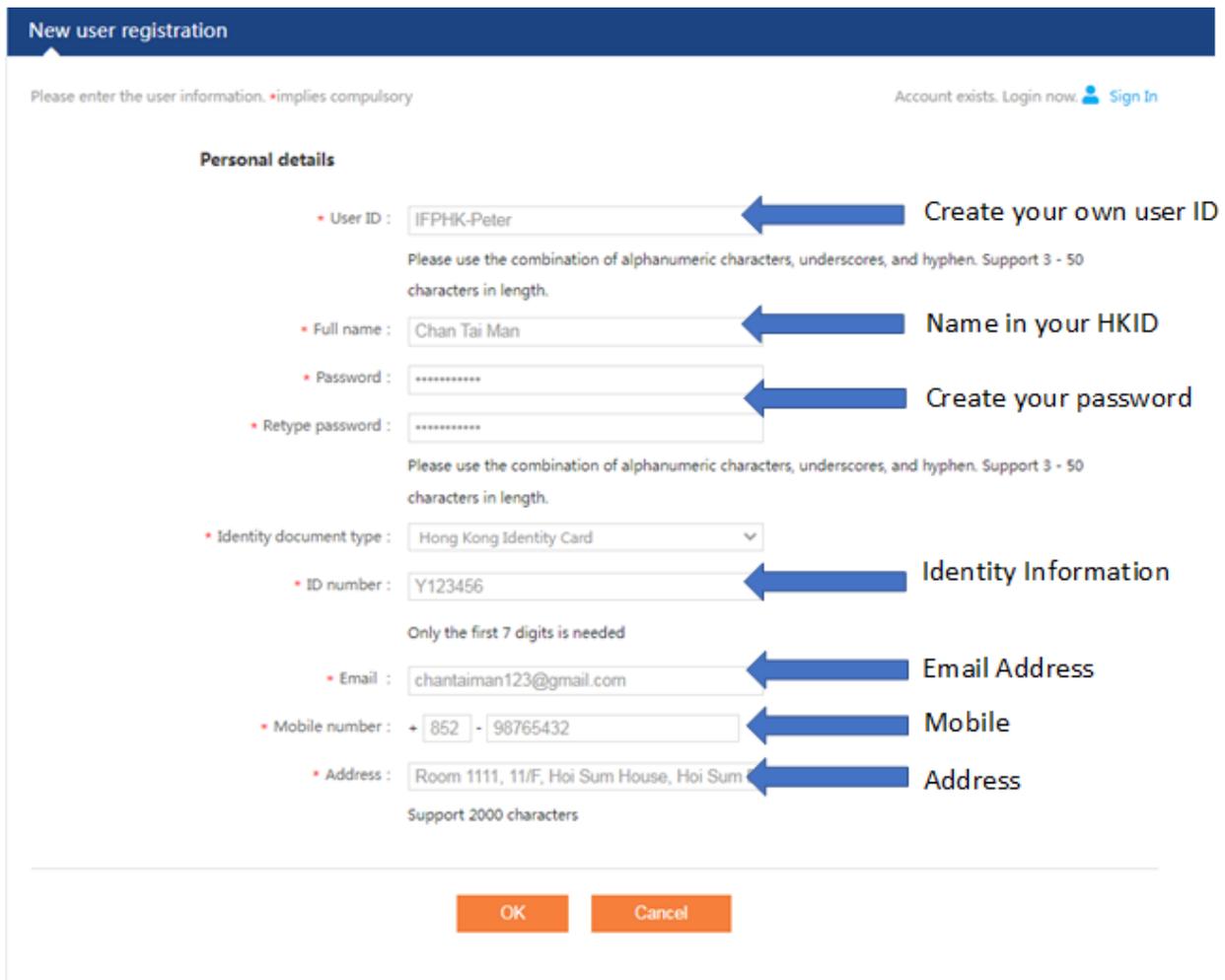
簡    繁    ENG

**Figure 1) Register the account**

**Step 2:** Please create an account **only if you intend to take on a course (the account only valid for 14 days after registration)**.

For full catalogue of IFPHK’s online courses, please refer to our website below:

[https://www.ifphk.org/enrollment/elearning/en\\_elearning\\_main.aspx](https://www.ifphk.org/enrollment/elearning/en_elearning_main.aspx)



The screenshot shows the 'New user registration' form with the following fields and annotations:

- User ID:** IFPHK-Peter. Annotation: Create your own user ID. Note: Please use the combination of alphanumeric characters, underscores, and hyphen. Support 3 - 50 characters in length.
- Full name:** Chan Tai Man. Annotation: Name in your HKID.
- Password:** [Redacted]. Annotation: Create your password.
- Retype password:** [Redacted]. Note: Please use the combination of alphanumeric characters, underscores, and hyphen. Support 3 - 50 characters in length.
- Identity document type:** Hong Kong Identity Card. Annotation: Identity Information.
- ID number:** Y123456. Note: Only the first 7 digits is needed.
- Email:** chantaiman123@gmail.com. Annotation: Email Address.
- Mobile number:** + 852 - 98765432. Annotation: Mobile.
- Address:** Room 1111, 11/F, Hoi Sum House, Hoi Sum. Annotation: Address. Note: Support 2000 characters.

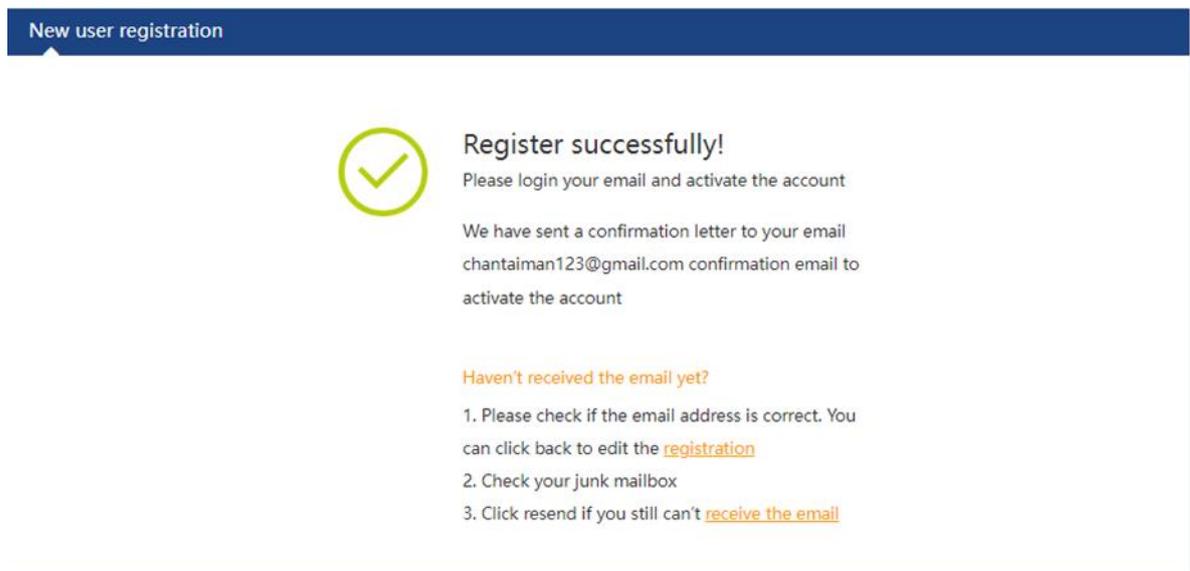
Buttons: OK, Cancel

**Figure 2) Account registration – enter your personal details**

You must **activate** the online account **within 24 hours** and make a **course enrollment within 24 hours** after the account activation.

**Step 3:** Upon clicking “**Register**”, please fill in the account registration form as shown in figure 2. Please fill in the corresponding blanks (\* necessary items) and submit the form. Please write the correct address as the official receipt and certificate will be mailed to your corresponding address provided. The page “**Register successfully!**” will be shown in Figure 3 below, and you will get an **activation email** upon completion of the form.

**IMPORTANT: If you are IFPHK Members, please enter the same information in our member’s record (including Full name, ID number and e-mail address.)**

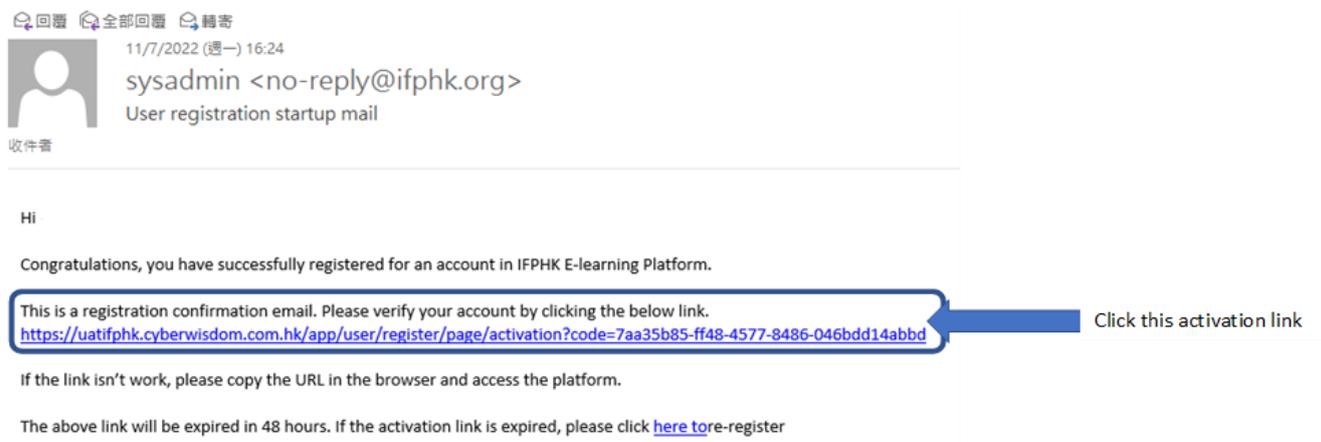


**Figure 3) Page showing that you have successfully registered**

**Step 4:** If you cannot receive any email, please click “**can’t receive the email**” and the system will resend the activation link to your corresponding email address again.

### 3.2 Account Activation

You will receive a welcome email from the email address <sysadmin no-reply@ifphk.org>. (Refers to Figure 4) Please click the link to activate your account. **You must activate your account within 24 hours.** Otherwise, the link will expire, and you need to register for an account again.



*Figure 4) Registration confirmation email*

### 3.3 Account Validity Period and Expiry

Once activated, your online account shall remain valid for 14 days. If you enrolled in a new course during the validity period, your account expiry date extends 14 days from the enrollment date of your last enrollment.

Please note that your online account is a one-time access to IFPHK's online courses, it **will be invalid after 14 days**. After that, you are required to create an account again in order to enroll in a new course. If the account is invalid, you will not be able to access the platform and view your record/electronic certificate(s) again.

### 3.4 Account Sign In

You are required to sign in to the FPLearning platform before accessing any of its features or enrolling e-courses.

(please make sure you activated your account (Section 3.2) before signing in).

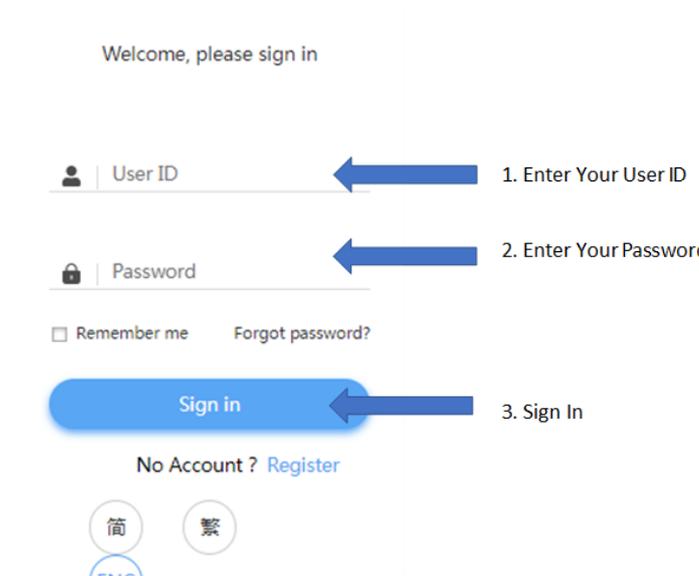
**Step 1 :** Go to FPLearning Platform’s website

([https://www.ifphk.org/enrollment/elearning/en\\_elearning\\_main.aspx](https://www.ifphk.org/enrollment/elearning/en_elearning_main.aspx)).

**NO OTHER DEVICE should be log into the account concurrently.**

**Step 2:** Enter your User ID and Password

**Step 3:** Click the “Sign In” button.



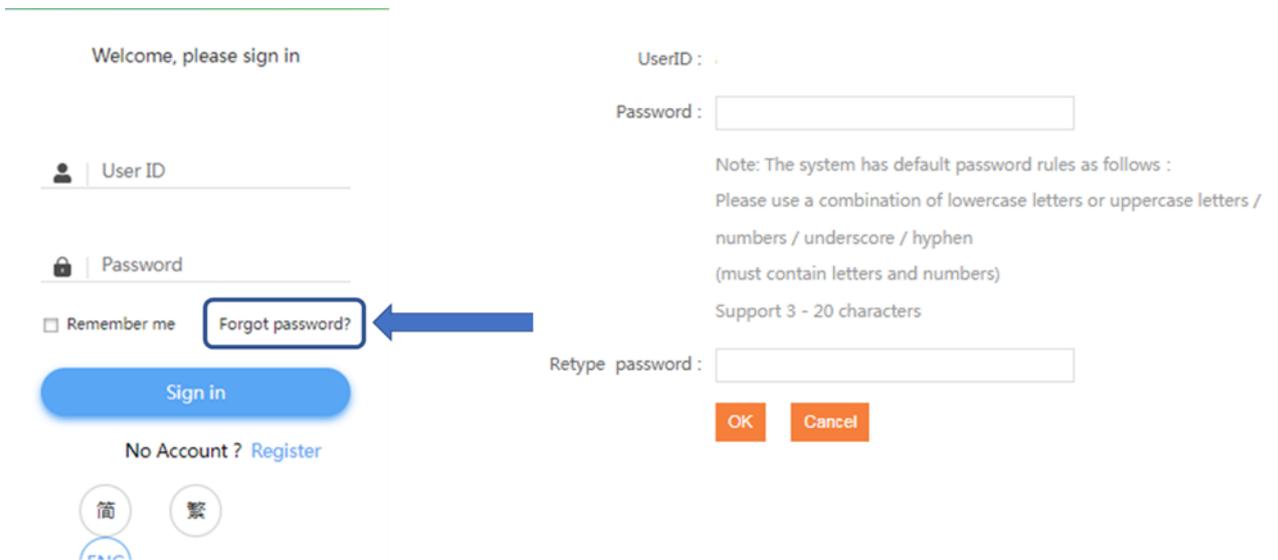
The screenshot shows a sign-in form with the following elements:

- Header: "Welcome, please sign in"
- Input field 1: "User ID" with a blue arrow pointing to it and the instruction "1. Enter Your User ID".
- Input field 2: "Password" with a blue arrow pointing to it and the instruction "2. Enter Your Password".
- Options: "Remember me" (checkbox) and "Forgot password?" (link).
- Button: "Sign in" with a blue arrow pointing to it and the instruction "3. Sign In".
- Footer: "No Account? Register" (link).
- Language selector: "簡" (Simplified) and "繁" (Traditional) buttons.

**Figure 5) Sign in with your registered personal details**

### 3.5 Forgot Password

If you have forgotten your account password, please click **“Forgot password?”** on the sign-in page. Enter your **User ID and registered email of your account**, and then click **“OK”** . The system will automatically send you a **password reset link** to your email address.



The screenshot shows a sign-in interface. On the left, there is a form with fields for 'User ID' and 'Password', a 'Remember me' checkbox, and a 'Forgot password?' link highlighted with a blue arrow. Below the form are 'Sign in' and 'Register' buttons, and language selection options for '簡' (Simplified) and '繁' (Traditional). On the right, there is a 'UserID : ' label, a 'Password : ' input field, a note about password rules (lowercase/uppercase letters, numbers, underscore, hyphen, 3-20 characters), and a 'Retype password : ' input field. At the bottom right are 'OK' and 'Cancel' buttons.

**Figure 6) Procedures of resetting password**

You should receive the password reset link if you enter the correct user ID and account registered email.

If your email address is not registered before, or it is an invalid account or you enter a wrong user ID, **“Account does not exist or email address unmatched”** message will pop up. Please either check your email address again or register for a new account again on the login page in case your account is invalid.

### 3.6 Authentication

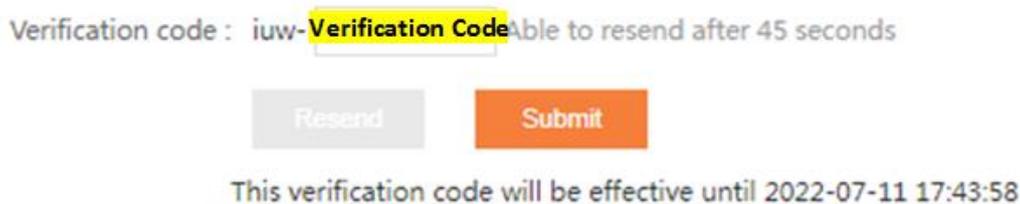
Every time you access FPLearning, you are required to enter in a one-time verification **passcode** to verify your identity. You will receive the one-time passcode by email by clicking **“Send”** to receive an email message. You will receive a one-time verification code.

You should enter the passcode within 5 minutes. If you cannot receive this email (both inbox and junk box), you can click **“Resend”** to obtain the code again.



**Figure 7) Procedures of resetting password**

You should type your verification code here:



**Figure 8) Enter your verification code in the box**

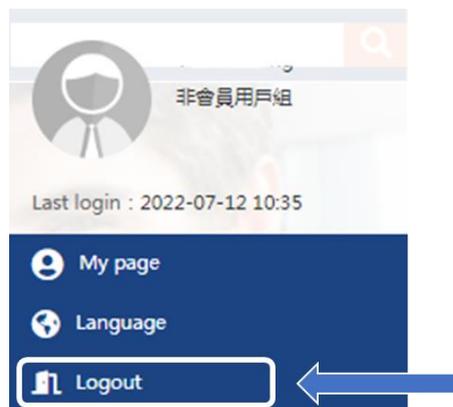
(Your account will be **frozen** if you enter the wrong verification code **6 times**. In that case, please email to [training@ifphk.org](mailto:training@ifphk.org) with your name, email address and user name, or contact 2982 7867 during office hour for assistance.)

## 4 FPLearning System Layout

### 4.1 Sign Out

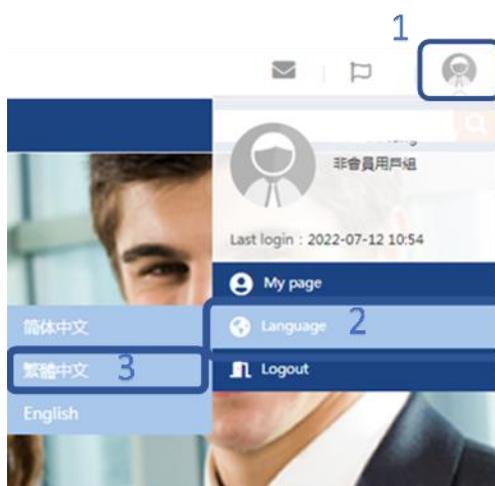
When you would like to log out from the platform, please click the icon on the right-hand corner, and a message will be prompted asking **“Are you sure you want to sign out?”**. Click **OK** and you will be directed to the login page, indicating that your account is successfully signed out.

(Please remember to sign out if you are using a public computer.)



*Figure 9) Log out button*

### 4.2 Change your prefer language

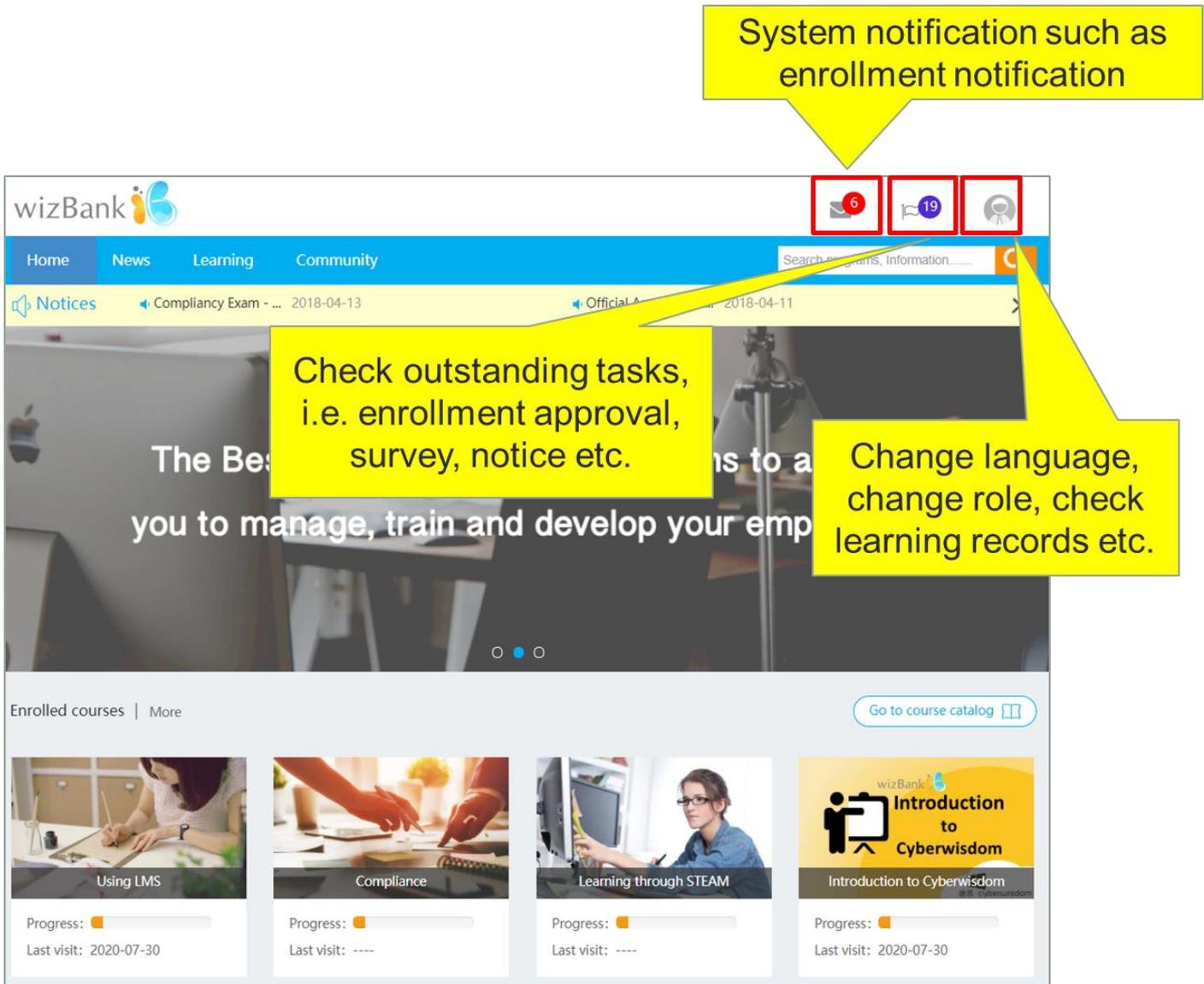


You can click the top right-hand corner button, then click **language**, and choose your **preferred language** in the system.

*Figure 10) Select your preferred language*

### 4.3 My Page

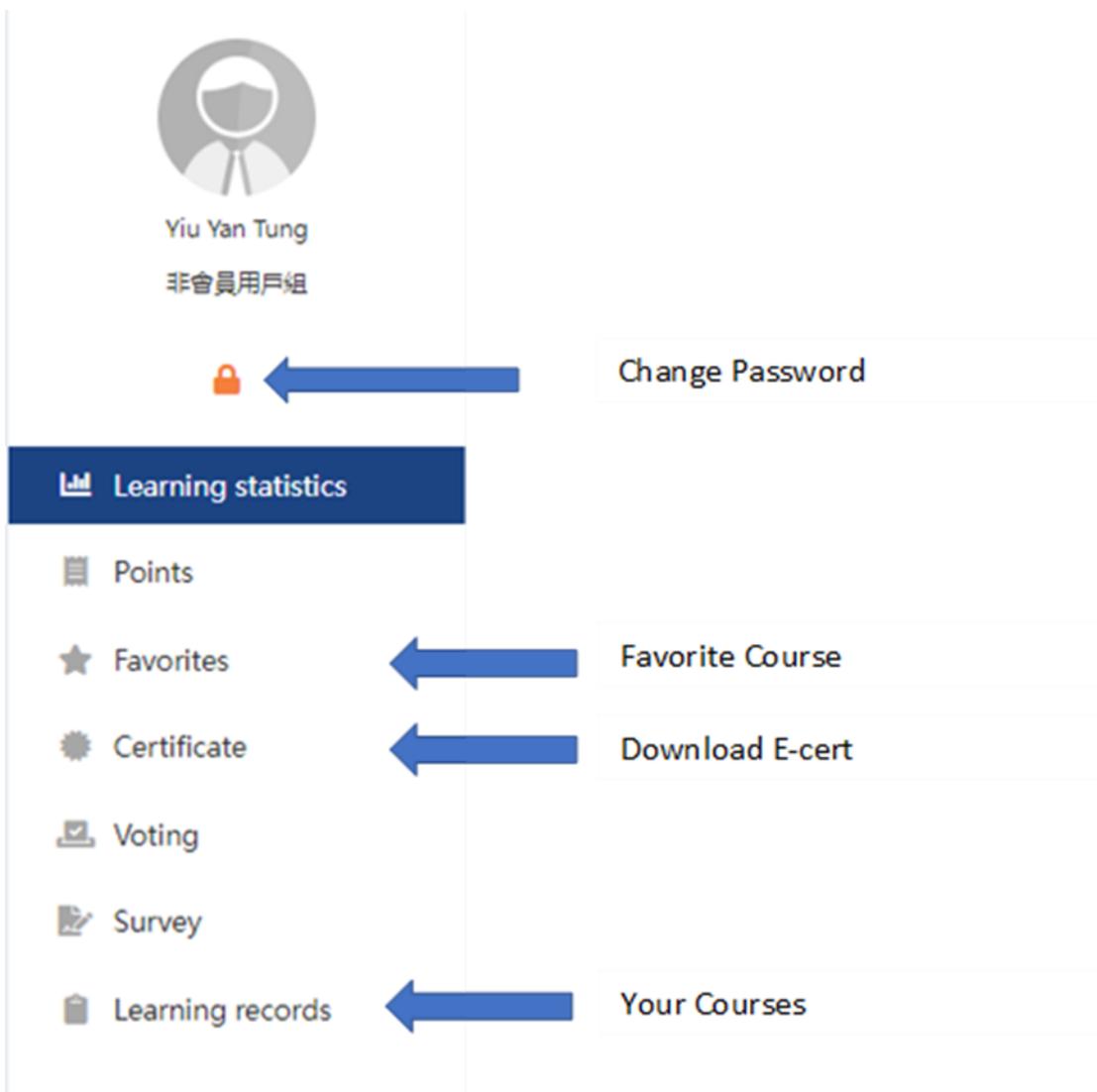
Once the login process has been completed, you will be able to see the **Homepage** below:



**Figure 11) Screenshot of homepage**

## My Page Column

1. Click the  button on the top right-hand corner
2. Click  “My Page” button



**Figure 12) Column of my page**

## 5 Course enrollment

The available course is shown in the “**Learning Button → Course Catalog**”, which provides you with a list of courses available for enrolment.

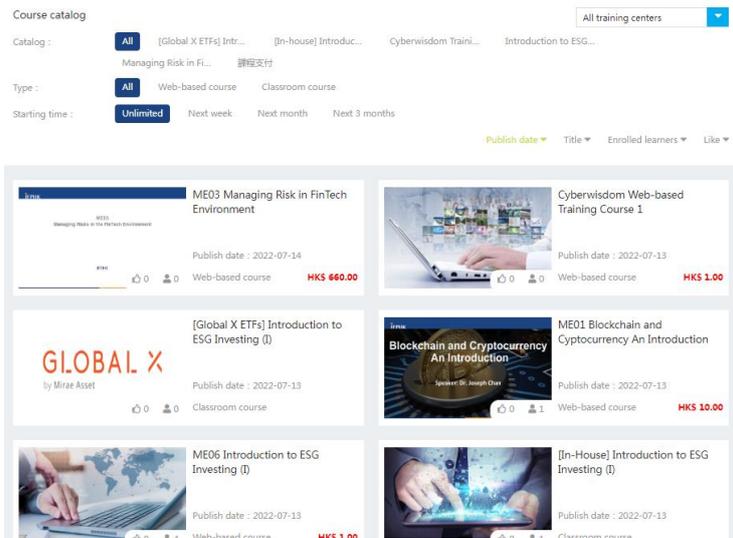


**Figure 13) List of our available courses**

**You can enroll the course by the following steps:**

**Step1:**

The page will display all the available courses in the form of a table. With the description of the course code, name and price.



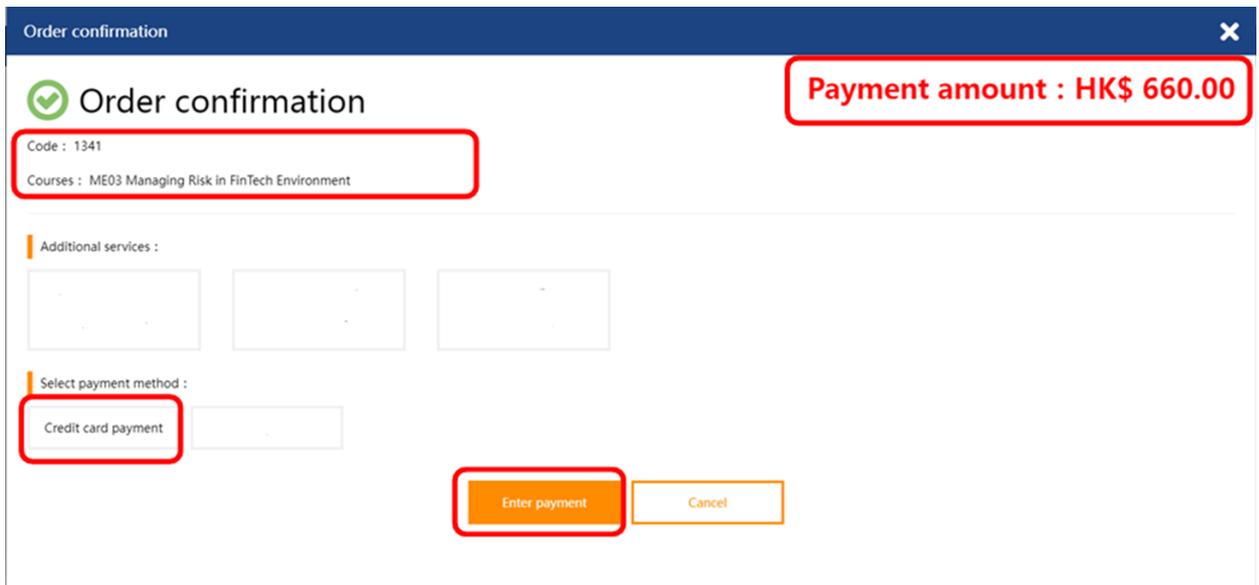
**Figure 14) Available Courses**

**Step 2: Click on the course that you would like to enroll, and then click “Buy Now”**



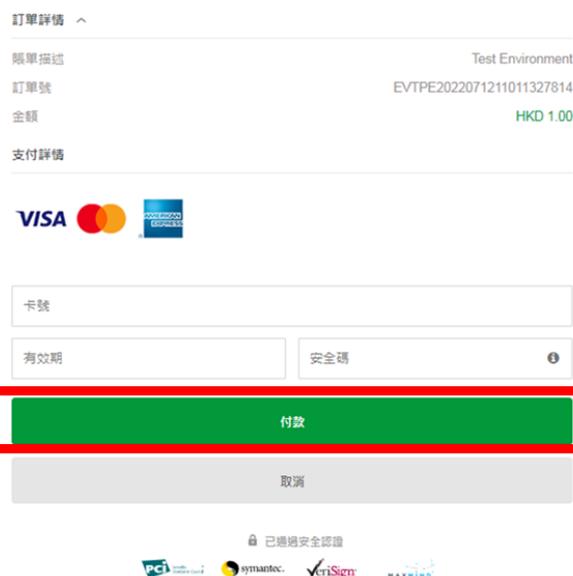
**Figure 15) Enroll in a course**

**Step 3:** Go to the **Order Confirmation Page** and check if the **course name**, and **payment amount** are correct. Please click **“Credit Card Payment”** then click **“Enter Payment”**



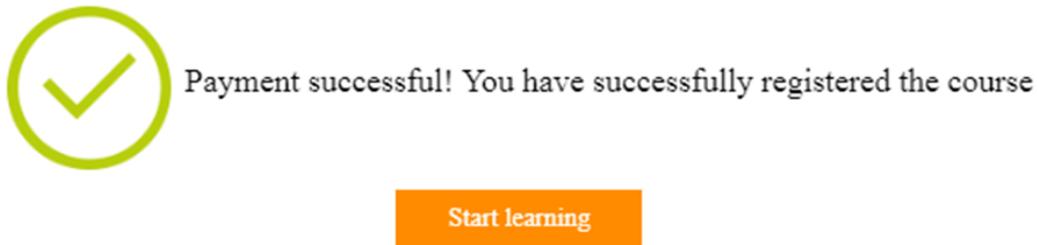
**Figure 16)** Order confirmation page

**Step 4:** You will be directed to the **credit card payment page**. Please enter your **credit card information** here and click **“Pay”**.



**Figure 17)** Credit card payment page

**Step 5:** If your course is successfully enrolled, “**Payment Successful!**” message will be pumped as in Figure 17 below, then click “**Start Learning**” to proceed to online learning.



*Figure 18) Page showing that payment is successful*

**Step 6:** Upon completion of payment process, you will receive a **confirmation email** from sysadmin<[no-reply@ifphk.org](mailto:no-reply@ifphk.org)>



*Figure 19) Order confirmation email*

## IMPORTANT NOTES:

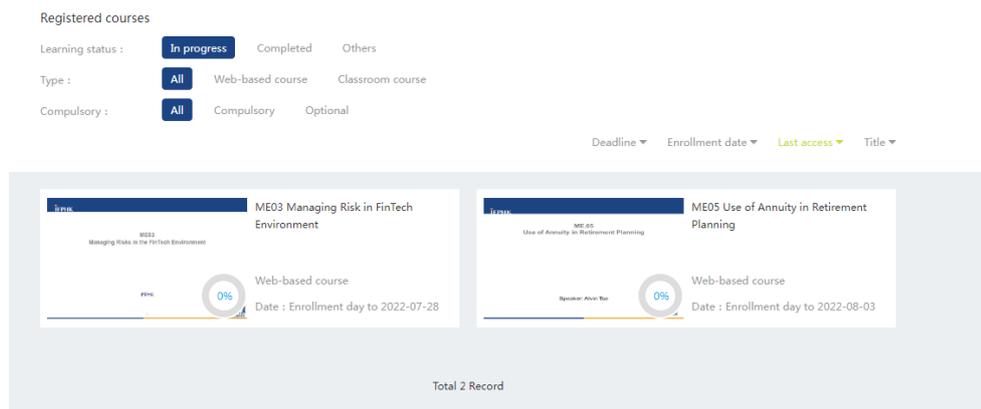
Please note that an account is only valid for **14 days**. Your learning progress will be **PERMANENTLY DELETED** after your account become invalid.

Please **keep your e-certificate (PDF) and learning records** for your own use upon completion of the course. You will not be able to access your account and the corresponding records afterwards.

## 6 Online Learning

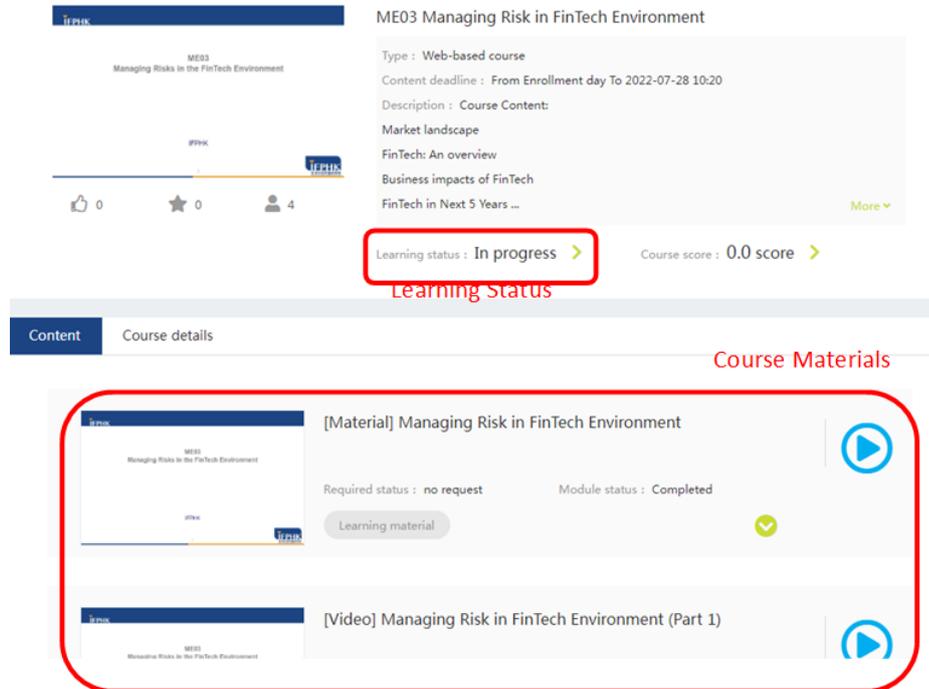
### 6.1 View Courses

**Step 1:** After logging into the FPLearning Platform, click “**Learning → Registered Courses**” to get an overview of all courses you have enrolled in.



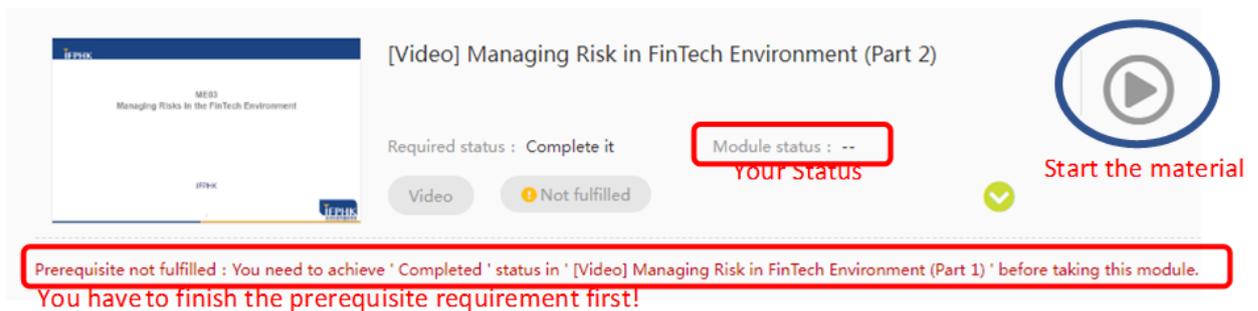
**Figure 20) Enrolled course list**

**Step 2:** Launch a course by **clicking on the course title**. You will be direct to the course module page with a list of all course materials, videos, and the learning status.



**Figure 21) Course page with materials, video and showing learning status of each item**

## 6.2 Access to the Course Materials



**Figure 22) Access to the materials**

### Module Status Meaning:

**Fulfilled:** You have finished the module and fulfilled the requirement

**Not Fulfilled:** You have opened the module but haven't completed the requirement

(i.e. not enough watching period/ didn't pass the quiz/ idle for a long period etc.)

**Viewed:** You have viewed the materials / video

**Passed:** You passed the assessment

**Completed:** You completed the module

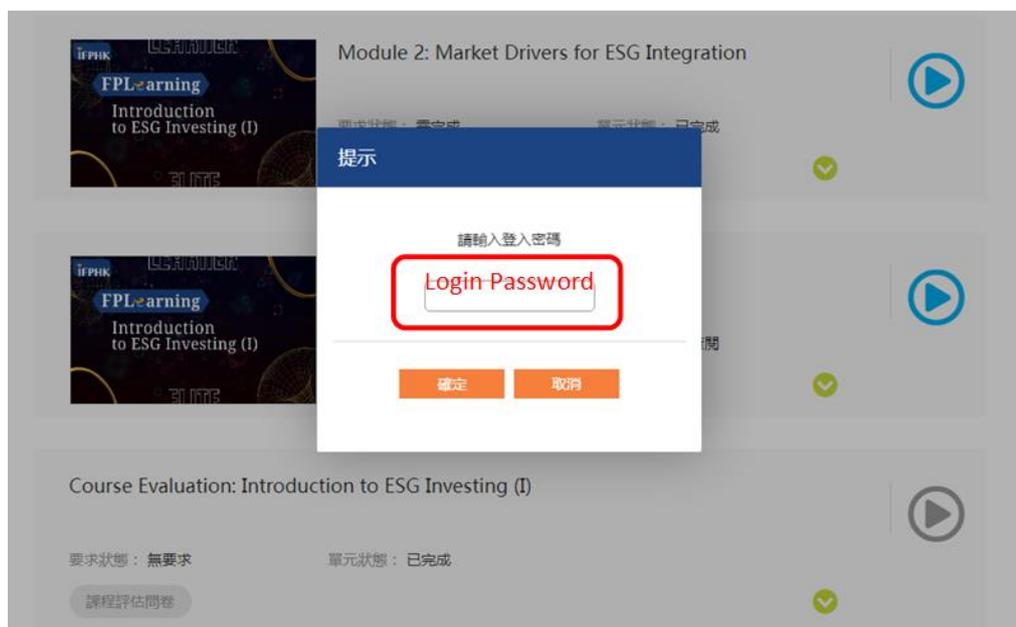
**Submitted:** You submitted the module

**Prerequisite not fulfilled:** You have to finish the previous module first

**Failed:** You failed the quiz

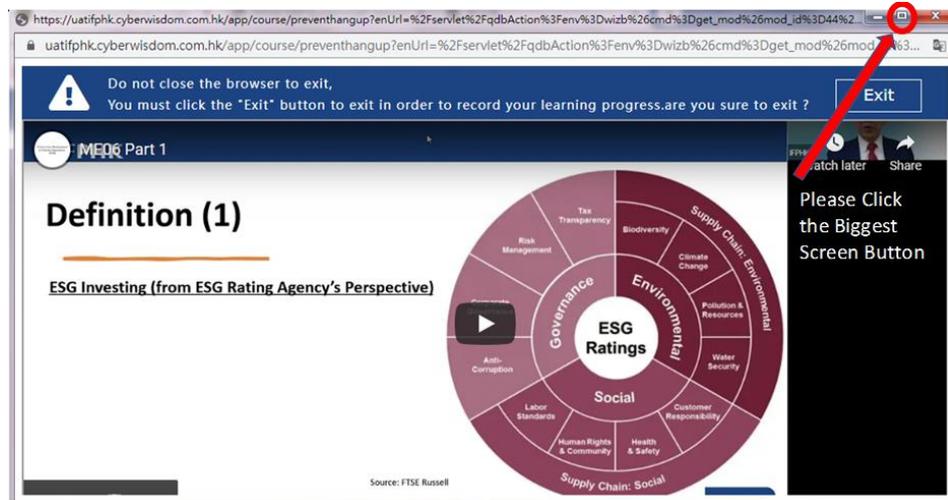
## 6.3 Access to Course Video

**Step 1:** To access a video, please enter your **login password** to verify your identity.



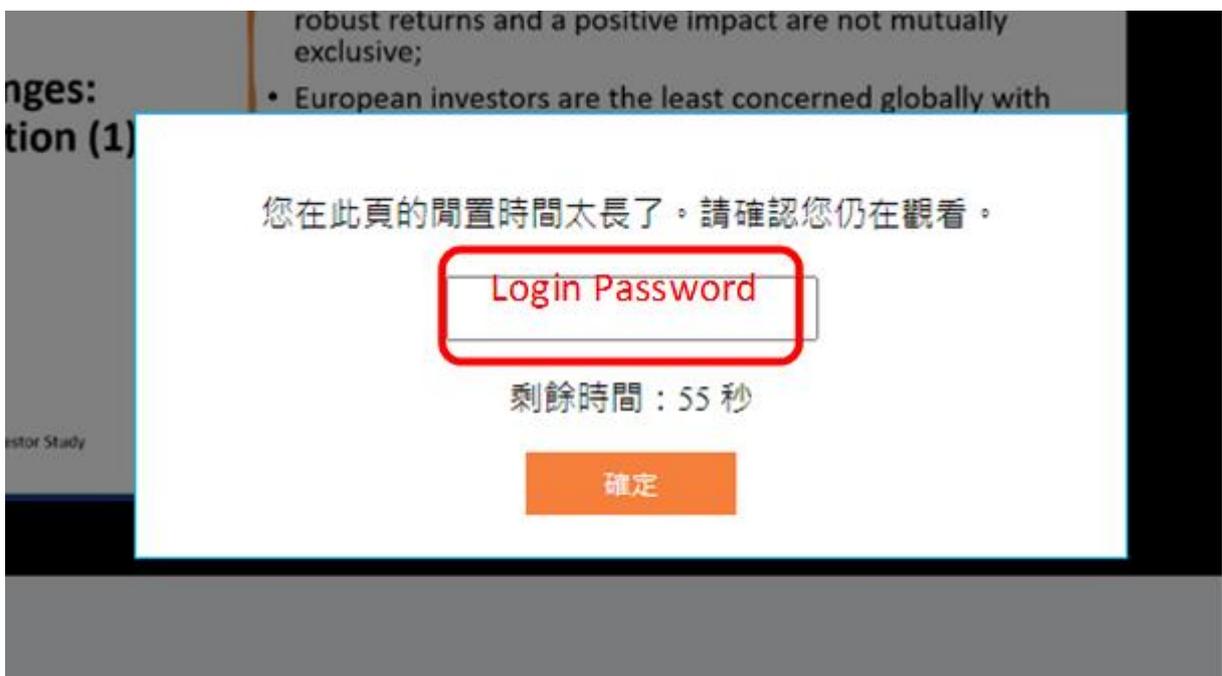
**Figure 23) Enter your login password in the box**

**Step 2:** You will be redirected to a video page. Please click the **top right-hand corner biggest screen button** (  ) first and start the video.



**Figure 24)** Click the biggest screen button

**Step 3:** The system will check from time to time whether you are still active in the courses, and a message box will be pumped out at irregular time intervals. Please enter your login password immediately to show that you are active.



**Figure 24)** Enter your login password to show that you are active in learning

**Step 4:** If you didn't enter your password, you would be seen as **inactive**. You need to start the module again. Please note that you are required to **complete a module within a preset watching time limit**.

您在觀看頁的閒置時間太長了，請重新開啟這單元。

*Figure 25) Message showing that you are inactive*

**Step 5:** If you finish the module or want to quit while watching the video, you **MUST** click the **“EXIT”** button in to **record your learning progress**. **YOUR LEARNING PROGRESS WILL NOT BE RECORD** if you exit the video by any other means.



*Figure 26) Click exit to record the learning progress*

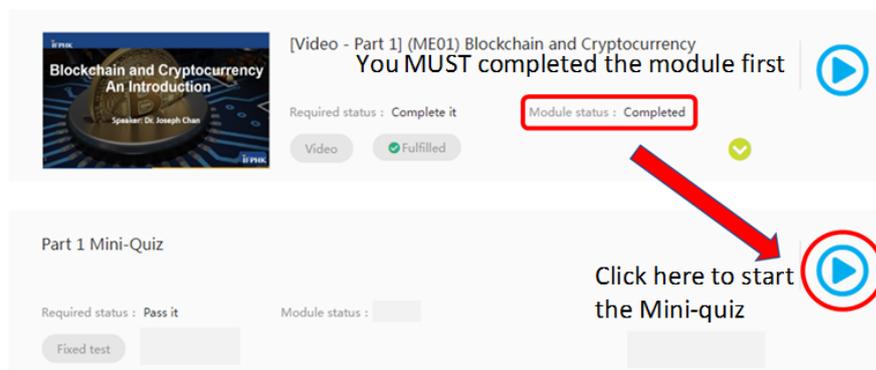
**Step 6:** You **MUST** fulfill the **preset watching time** of the course to complete the module, otherwise, your module status will remain unfulfilled and you cannot assess to other videos or final assessment.

## 6.4 Mini-quiz

**Step 1:** After you complete the video, you are required to finish a mini-quiz.

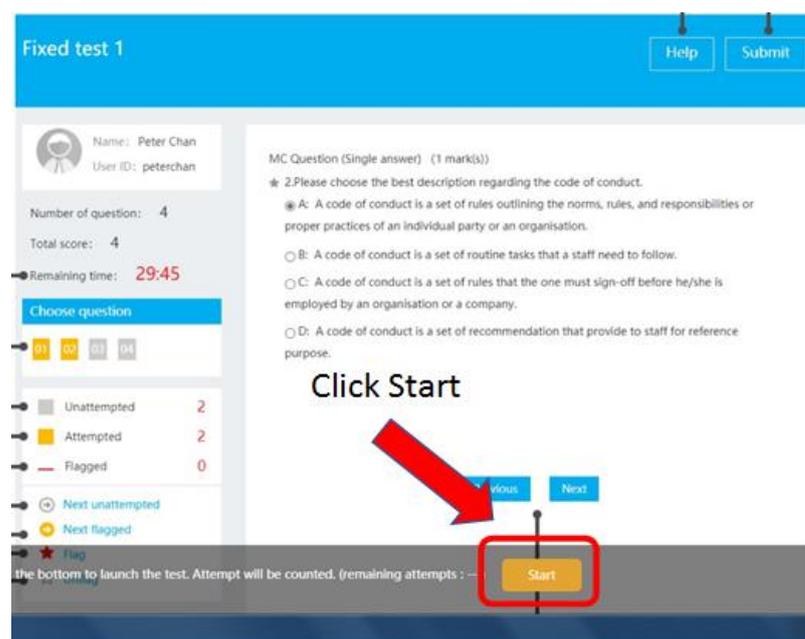
**(For IA eCPD courses or specific courses only)**

**Step 2:** Click  to start mini-quiz



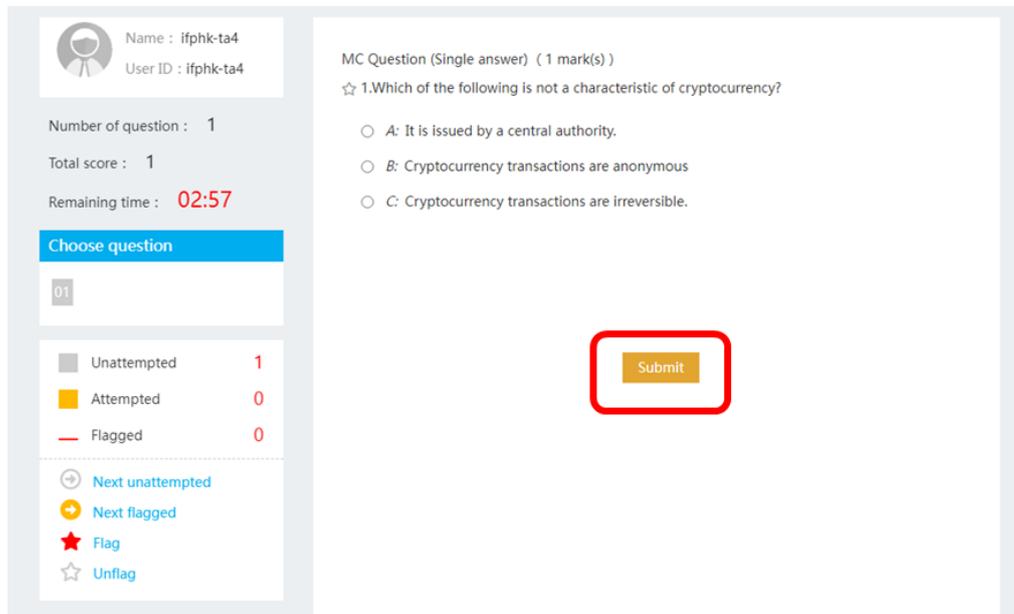
**Figure 27) Start the mini-quiz after you completed each part of the video**

**Step 3:** A window will pump out to show the instructions for taking the mini-quiz. Go to the bottom of the page, and click “Start now” when you are ready to take the mini-quiz.



**Figure 28) Start the mini-quiz**

**Step 4:** Choose the best answer by clicking the option, and then click **“Submit”**.



**Figure 29) Submit the mini-quiz**

**Step 5:** To see your mini-quiz result, please click the **refresh button** (  ) on the left hand corner of the page. If you pass the quiz, the module status will change to **“passed”**. If you fail the quiz, the module status will change to **“failed”**.

**Step 6:** You **MUST** get the mini-quiz answer **CORRECT** in order to proceed to next module.

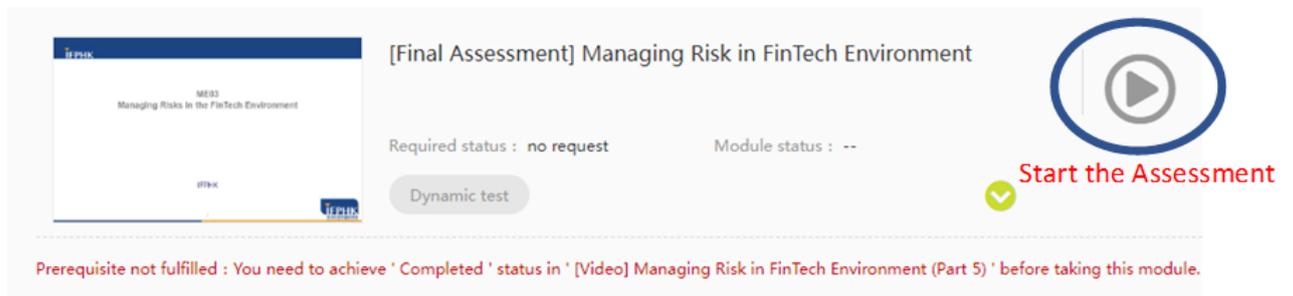
## 6.5 Final Assessment

### 6.5.1 Taking the assessment

#### Reminder:

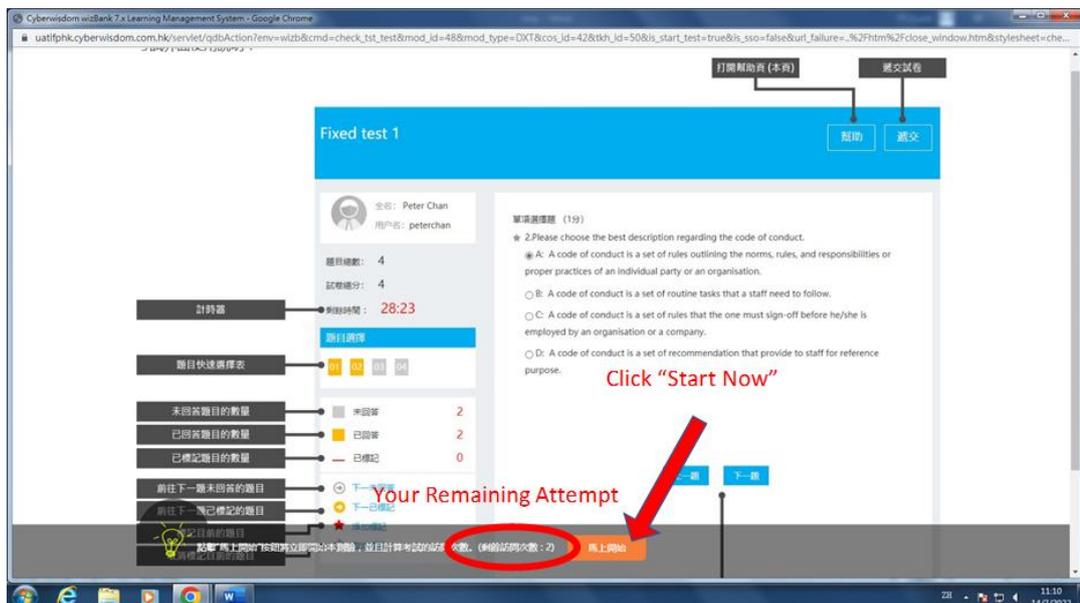
**The passing rate of the final assessment is 80% of the total score**

**Step 1:** Click the  button to start your assessment



**Figure 30) Start the final assessment in course page**

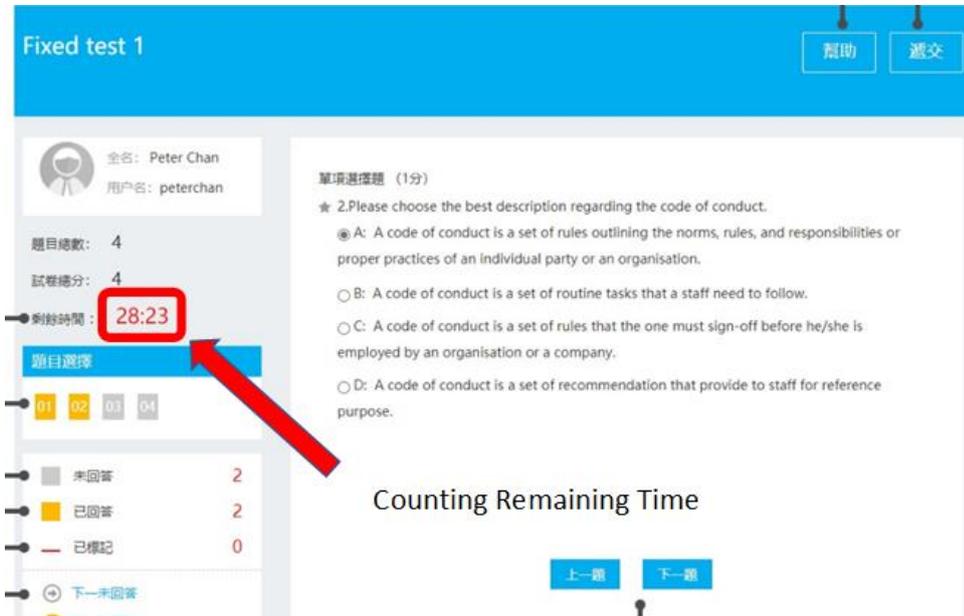
**Step 2:** A window will be pumped out to show the instructions for taking the assessment. At the bottom, you can see your **remaining attempt**, click **“Start now”** when you are ready to take the assessment.



**Figure 31) Start the final assessment**

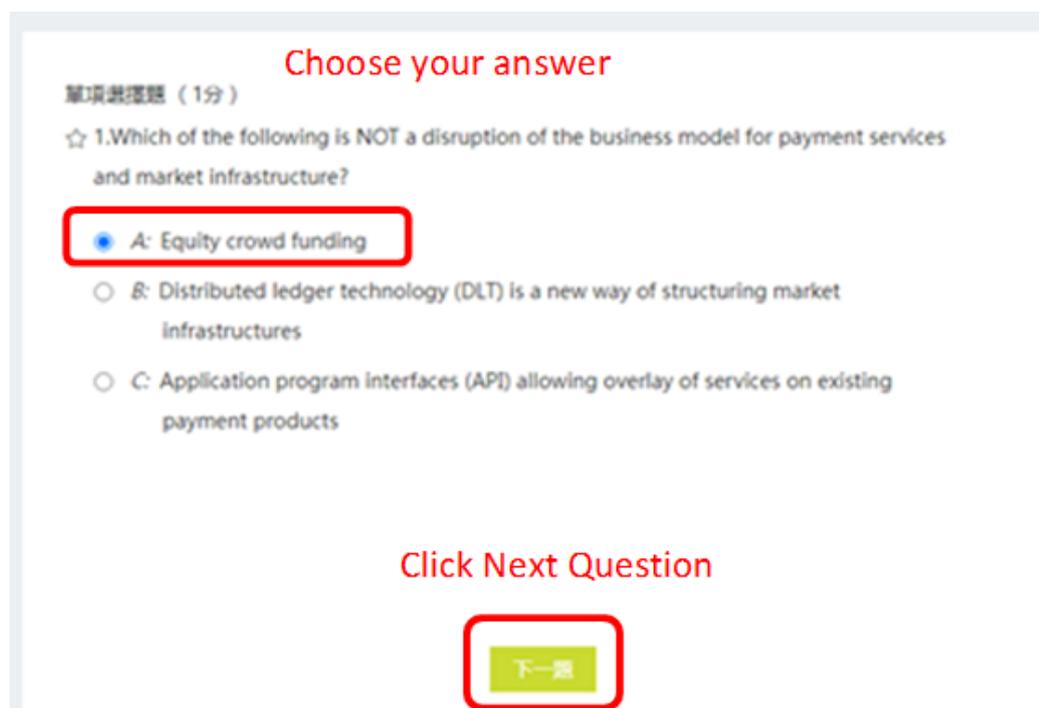
**Step 3:** You are required to complete the assessment within a prescribed time limit.

The **System will start the counter** after you click the “Start Now” button.



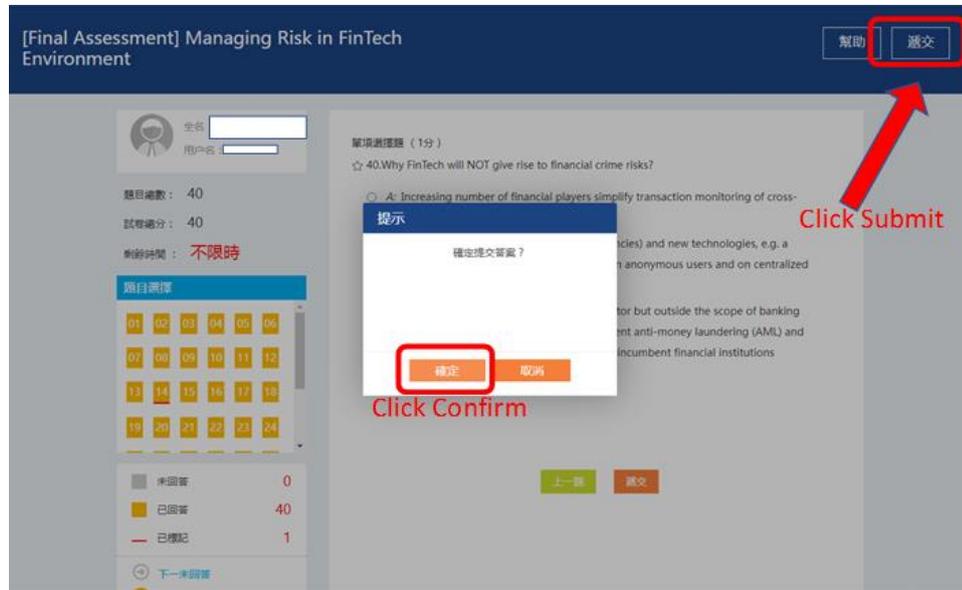
**Figure 32) Finish the final assessment within time limit**

**Step 4:** Choose the best answer by clicking the option, and then click “Next Question”



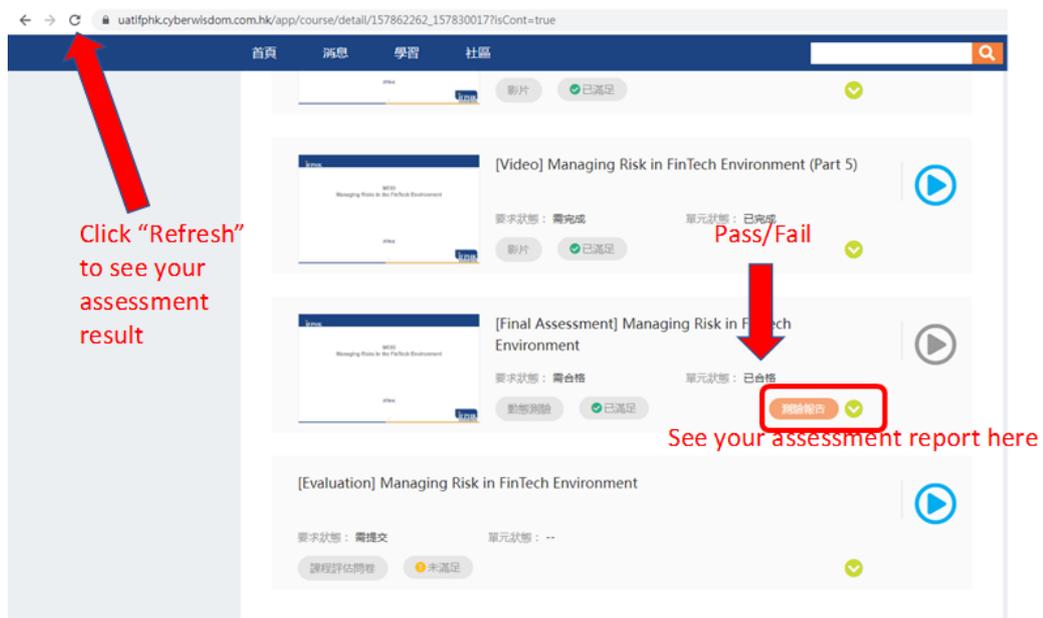
**Figure 33) Click the best answer in the final assessment**

**Step 5:** If you finish the assessment, please click the **“Submit”** button in the top-right hand corner and then click **“Confirm”** in the pop-up window



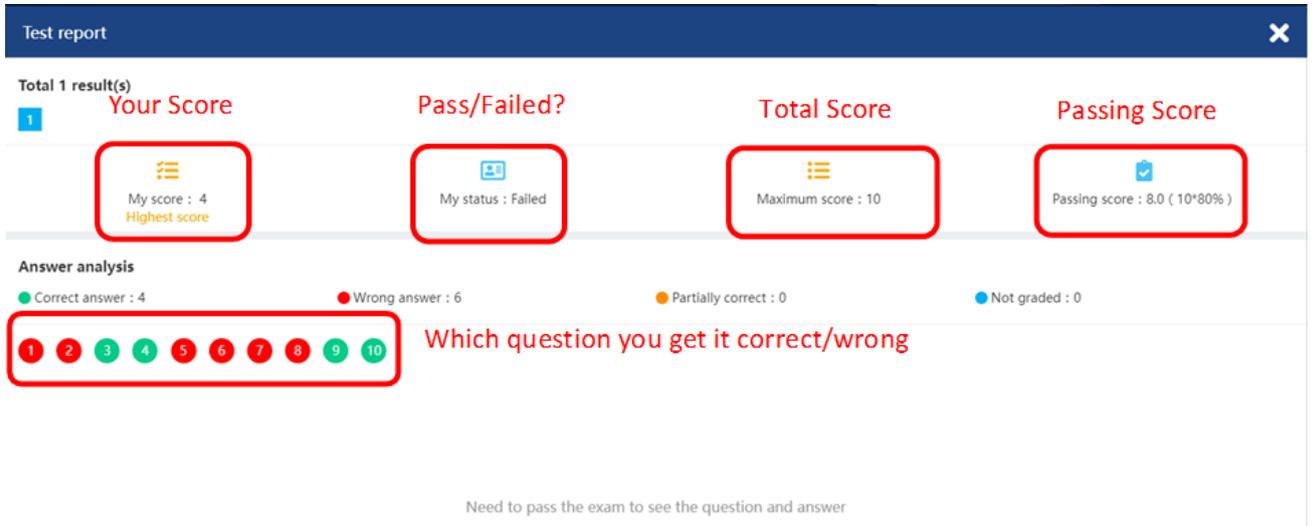
**Figure 34) Submit the final assessment**

**Step 6:** To view your assessment result, please click the **refresh button** ( ↻ ) on the left-hand corner. If you pass the assessment, the module status will changed to **“passed”**, if you fail the assessment, the module status will changed to **“failed”**.



**Figure 35) Refresh and check your assessment report**

**Step 7: Click “Test Report” to view your assessment result**



**Test report**

Total 1 result(s)

Your Score	Pass/Failed?	Total Score	Passing Score
My score : 4 Highest score	My status : Failed	Maximum score : 10	Passing score : 8.0 ( 10*80% )

Answer analysis

Correct answer : 4      Wrong answer : 6      Partially correct : 0      Not graded : 0

Which question you get it correct/wrong

Need to pass the exam to see the question and answer

**Figure 36) Page showing your assessment result**

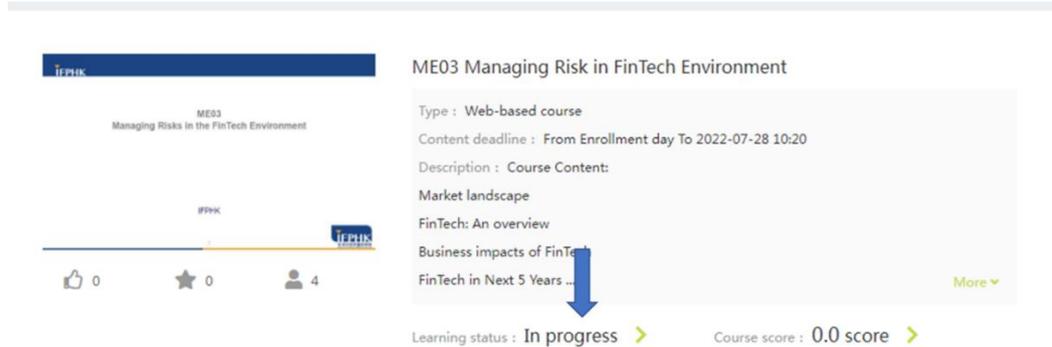
**6.5.2 Retake Policy**

You **MUST PASS** the final assessment to complete the course. The passing rate is **80%**. If you fail the final assessment, you have a second opportunity to take the assessment. If you fail the second attempt, you are required to enroll the same course again and pay the enrollment fee.

You can enroll again for a course even if you have successfully completed the course. Please note that NO CE/CPT/eCPD point will be granted for the second completion of the same course in the same calendar year.

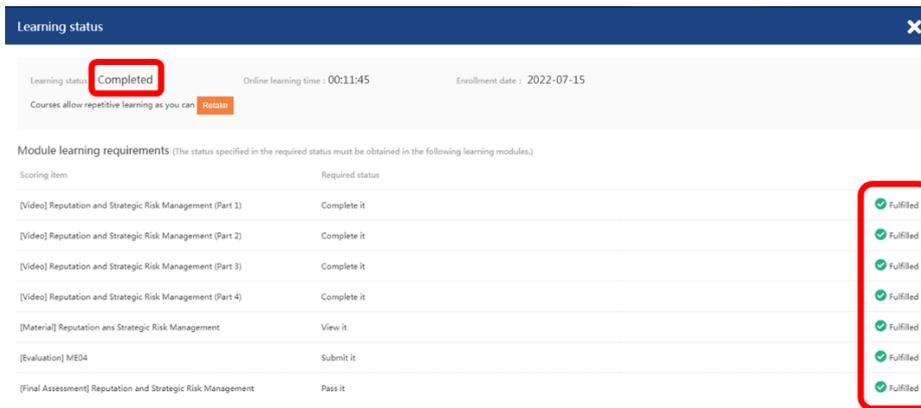
### 6.5.3 Learning Status

**Step 1:** You can click on the “Learning Status” to see which module you have completed.



**Figure 37)** Click to check your learning status

**Step 2:** If you finish all the modules, the learning status will be changed to “COMPLETED”.

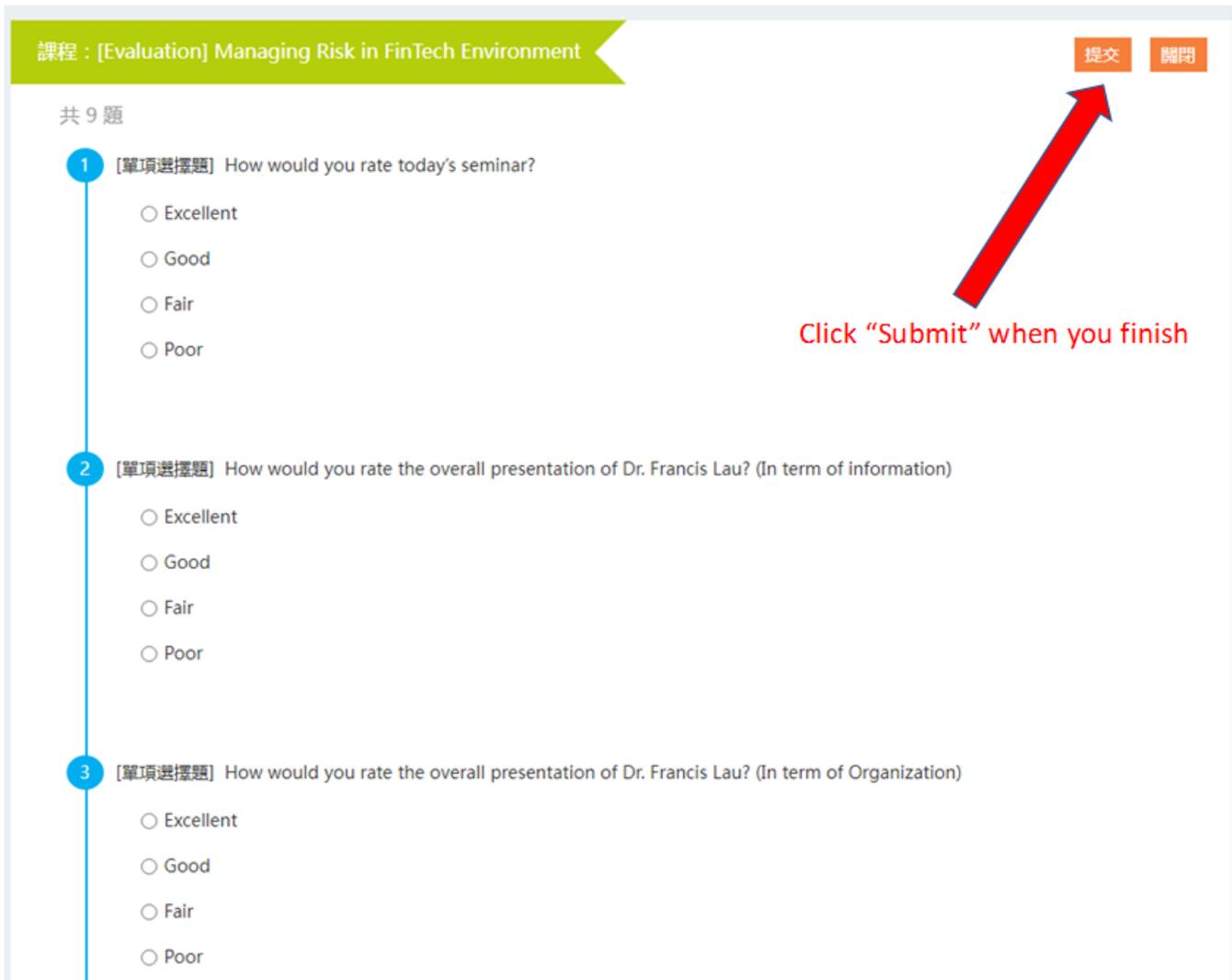


**Figure 38)** Completed learning status if you fulfilled all the requirement

## 6.6 Evaluation Form

**Step 1:** Click on the evaluation form module

**Step 2:** Fill-in the evaluation form, and click the “**SUBMIT**” when you finished.



課程 : [Evaluation] Managing Risk in FinTech Environment

提交 關閉

共 9 題

1 [單項選擇題] How would you rate today's seminar?

- Excellent
- Good
- Fair
- Poor

2 [單項選擇題] How would you rate the overall presentation of Dr. Francis Lau? (In term of information)

- Excellent
- Good
- Fair
- Poor

3 [單項選擇題] How would you rate the overall presentation of Dr. Francis Lau? (In term of Organization)

- Excellent
- Good
- Fair
- Poor

Click "Submit" when you finish

**Figure 39) Fill in the evaluation form**

## 7 Course Completion

### 7.1 Electronic Certificate

The electronic certificate is available upon completion of the course. Please **download it immediately** as evidence that you have completed the course. The electronic certificate is in PDF format. You may either save it as a soft copy or print it out.

**Note:**

**NO electronic certificate can be download after your account become invalid.**

Please keep them safely for your future reference.

#### How to download the electronic certificate?

**Step 1:** Click the  button in the top right-hand corner

**Step 2:** Click  "My Page" button

**Step 3:** Click  "Certificate" button

**Step 4:** You will see the course that you have completed on the page. Click the "Download" button

Certificate list		
Certificate title	Name	Valid to
ME06 Introduction to ESG Investing (I)	ME06 Introduction to ESG Investing (I)	2023-07-31
		

Total 1 results

**Figure 40) Download the electronic certificate in "certificate" column**

**Step 5:** You will receive the certificate of completion

**(Notice: This certificate is not for IA eCPD Reporting purpose, please refer to Section 7.2 for IA eCPD certificate printing procedure)**



**Figure 41) Sample Certificate**

## 7.2 IA eCPD Official Certificate & IFPHK Receipt

The hard copy of the IA eCPD certificate and receipt issued by IFPHK will send to the participants' corresponding address provided in the FPLearning platform by batch **in two months (Please refer to the mailing schedule below)**. Please make sure you enter a **complete residential address** that includes the flat/house number, street.

If you want to receive the IA eCPD official cert or receipt immediately, you may send your request by email to [training@ifphk.org](mailto:training@ifphk.org). Please provide your full name and course name in your request. An additional administration fee of **\$100 for EACH Cert and \$20 for EACH Receipt (\$30 EXTRA FEE FOR POSTAGE)** will be charged and we will proceed with your request after receiving your deposit slip.

### Mailing Schedule:

Completion Date	Mailing Date
1 Jan – 29 Feb	Mar
1 Mar – 30 Apr	May
1 May – 30 Jun	Jul
1 Jul – 31 Aug	Sep
1 Sep – 31 Oct	Nov
1 Nov – 31 Dec	Jan (Next Year)

## 8 Technical Support

If you encounter any technical issues, please send us your queries at [training@ifphk.org](mailto:training@ifphk.org) with personal details and screenshots of the issue, or call **2982 7867** at office hour and our representative will get back to you in two business days.

### Office Hour:

<b>Monday to Friday</b>	<b>09:30 AM – 12:30 PM</b> <b>14:00 PM – 18:00 PM</b>
<b>Saturday, Sunday and Public Holidays</b>	<b>Off</b> (You may send your queries through email; our representative will reply your queries on the <b>next business day</b> )