

# Money Learning Directory User Guide

理財學習資訊平台使用指南



# Account registration 帳戶登記

Money Learning Directory

### User login

Username/ Email address

Password

Login

[Forgot username or password?](#)

[Create account](#)

Please click here to create an account and fill in the form.  
請按此設立新帳戶並填寫表格。

User Guide   FAQ   Teams of Use

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Money Learning Directory

### Money Learning Directory > Registration

Organisation name (English)\*

Organisation name (Traditional Chinese)\*

Organiser type\* Asset management companies / MPF providers / MPF brokers

Department\*

Job title\*

Email address\*

Confirm email address\*

Contact person\*

Office phone\*

Mobile phone

Username\*

Password\*

Confirm password\*

By clicking on "Register" below, you are agreeing to the Terms of Use of the Money Learning Directory and such other terms and conditions as displayed from time to time on the HKSFL website.

I'm not a robot

reCAPTCHA  
Privacy - Terms

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# Account activation 啟動帳戶

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Money Learning Directory > Registration

Thank you! Your registration request was submitted successfully and we are reviewing it. You will receive an email informing you of the status and if additional information needs to be provided for the review.

[Back](#)

If your account request is approved, you will receive an email with a website link to activate your account. Please activate your account within 14 days.

如你的帳戶申請已獲批准，你會收到一封附有帳戶啟動連結的電郵，請於14日內啟動你的帳戶。

# Login 登入

Please input the username/email address and password you created to log in to the system.  
請輸入你建立的登入名稱/電郵及密碼登入系統。

If you forget your password, please click “Forgot username or password”. You will receive an email to guide you to reset your password.  
如果你忘記密碼，請按“Forgot username or password”，你將會收到一封電郵指示你如何重設你的密碼。

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# Create an initiative 建立新的項目

Money Learning Directory

Welcome [testing@heart \(testing organisation\)](#) | [Profile](#) | [Logout](#)

Money Learning Directory > Entry list

Ref. no  Title

Type  Status  Date

Show  entries

Ref. no	Type	Name	Last modified date	Status	Action
RS010003	Resource	<a href="#">Resource 003</a>	21/11/2016 17:34:57	Published	<input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Unpublish"/> <input type="button" value="Duplicate"/>
ET010002	Event	<a href="#">Event 002</a>	21/11/2016 17:27:01	Waiting for approval	<input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Unpublish"/> <input type="button" value="Duplicate"/>

Showing 1 to 2 of 2 entries 1

Please select “Event / Programme” or “Resource” to create an initiative.

要建立新的項目，請選擇“Event / Programme”或“Resource”。

# Create an initiative 建立新的項目

This screenshot shows the first part of a web form for creating an initiative. It includes the following fields and controls:

- Email address\***: A text input field with a red asterisk indicating it is required.
- Fee (HK\$)\***: A text input field with a red asterisk and a question mark icon.
- Website (English)**: A text input field.
- Website (Traditional Chinese)**: A text input field.
- Image**: A file upload area with a "Browse..." button and a question mark icon.
- Summary (English)\***: A large text area with a red asterisk and a question mark icon.
- Summary (Traditional Chinese)\***: A large text area with a red asterisk and a question mark icon.
- Buttons**: "Save" and "Preview" buttons at the bottom.
- Footnote**: "\* Indicates required field" at the bottom left.
- Footer**: "User Guide", "FAQ", "Terms of Use", and "Copyright © 2016 Investor Education Centre. All rights reserved." at the bottom.

This screenshot shows the second part of the web form, containing the following fields and controls:

- Category**: A dropdown menu.
- Target audience**: A dropdown menu.
- Language(s)**: A dropdown menu.
- Location (English)**: A text input field.
- Location (Traditional Chinese)**: A text input field.
- Start date and time**: A date and time picker.
- End date and time**: A date and time picker.
- Phone**: A text input field.
- Email address**: A text input field.
- Fee (HK\$)**: A text input field.
- Website (English)**: A text input field.
- Website (Traditional Chinese)**: A text input field.
- Summary (English)**: A text input field.
- Summary (Traditional Chinese)**: A text input field.
- Buttons**: "Back" and "Submit for approval" buttons at the bottom.
- Footnote**: "\* Indicates required field" at the bottom left.
- Footer**: "User Guide", "FAQ", "Terms of Use", and "Copyright © 2016 Investor Education Centre. All rights reserved." at the bottom.

After filling in all necessary information, please click the "Preview" button and then "Submit for approval" button to submit an entry. You can click the "Save" button if you do not want to submit now. 輸入所有資料後，請按 "Preview" 然後按 "Submit for approval" 以提交項目。如你不想即時提交，你可按 "Save"。

# Entry management 項目管理

The screenshot shows the Money Learning Directory interface. At the top left is the logo for Money Learning Directory. On the top right, there is a welcome message and links for Profile and Logout. Below this, the breadcrumb "Money Learning Directory > Entry list" is shown. To the right of the breadcrumb is a dropdown menu set to "Event / Programme" and a green "Create" button. Below the breadcrumb is a search form with fields for "Ref. no" and "Title", and dropdown menus for "Type" (set to "All") and "Status" (set to "All"). There is also a "Date" field with the format "DD/MM/YYYY" and a green "Search" button. Below the search form, it says "Show 10 entries". A table lists two entries:

Ref. no	Type	Name	Last modified date	Status	Action
RS010003	Resource	Resource 003	21/11/2016 17:34:57	Published	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Unpublish</a> <a href="#">Duplicate</a>
ET010002	Event	Event 002	21/11/2016 17:27:01	Waiting for approval	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Unpublish</a> <a href="#">Duplicate</a>

Below the table, it says "Showing 1 to 2 of 2 entries" and a page number "1" in a box.

You can view the status of all your entries here.  
你可於此處查看你所有的項目。

The end  
完

