



*What will you learn today?*

## USER MANUAL (LEARNER)

---

INSURANCE AUTHORITY

December 2021

## TABLE OF CONTENTS

1.	Document Introduction .....	3
2.	Ultrabot System Requirements .....	3
3.	Accessing e-Learning system .....	4
3.1.	Create an Account .....	4
3.2.	System Login.....	5
3.3.	OTP Verification.....	8
3.4.	Learner’s home page .....	9
3.5.	Log Out .....	10
4.	Available Course .....	10
5.	My Courses .....	11
5.1.	View Courses .....	11
5.2.	View Course Modules.....	12
5.3.	Continual Authentication .....	14
6.	Download Course Certificate.....	15
7.	Preferences.....	15
7.1.	Change Password.....	16
7.2.	My Profile Settings.....	17
7.3.	Regional Settings .....	18
8.	Support .....	18
8.1.	Engati Support .....	19

## **1. DOCUMENT INTRODUCTION**

---

The Document serves to depict the salient features of Ultrabot® Product. The document is intended for users having “Learner” role in the e-Learning System. The document has detailed screen shots of the application with appropriate labels to enhance understanding of the features. It is suitable for users having novice-typical level of understanding of the e-Learning System.

## **2. ULTRABOT SYSTEM REQUIREMENTS**

---

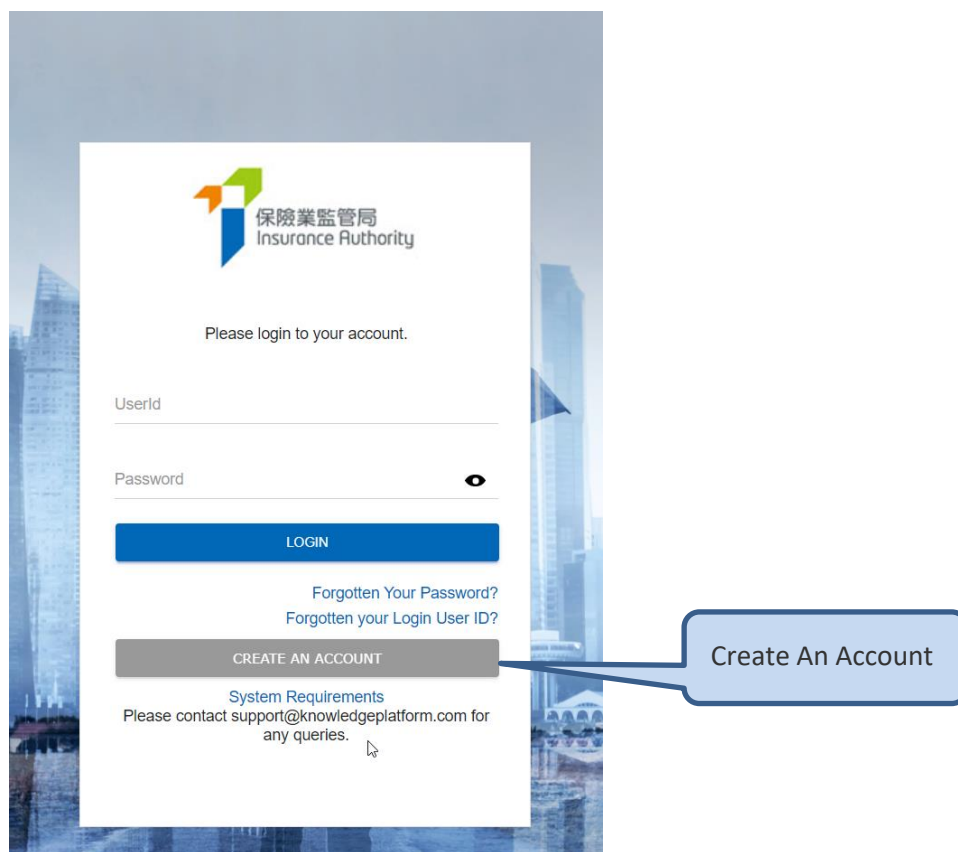
The recommended system requirements for Ultrabot Client side are as following:

1. IE 11/ Microsoft Edge/Chrome Latest Version /Safari Latest Version
2. Operating System: Windows 7/Windows 10/iOS 10/ Android
3. Responsive

## 3. ACCESSING E-LEARNING SYSTEM

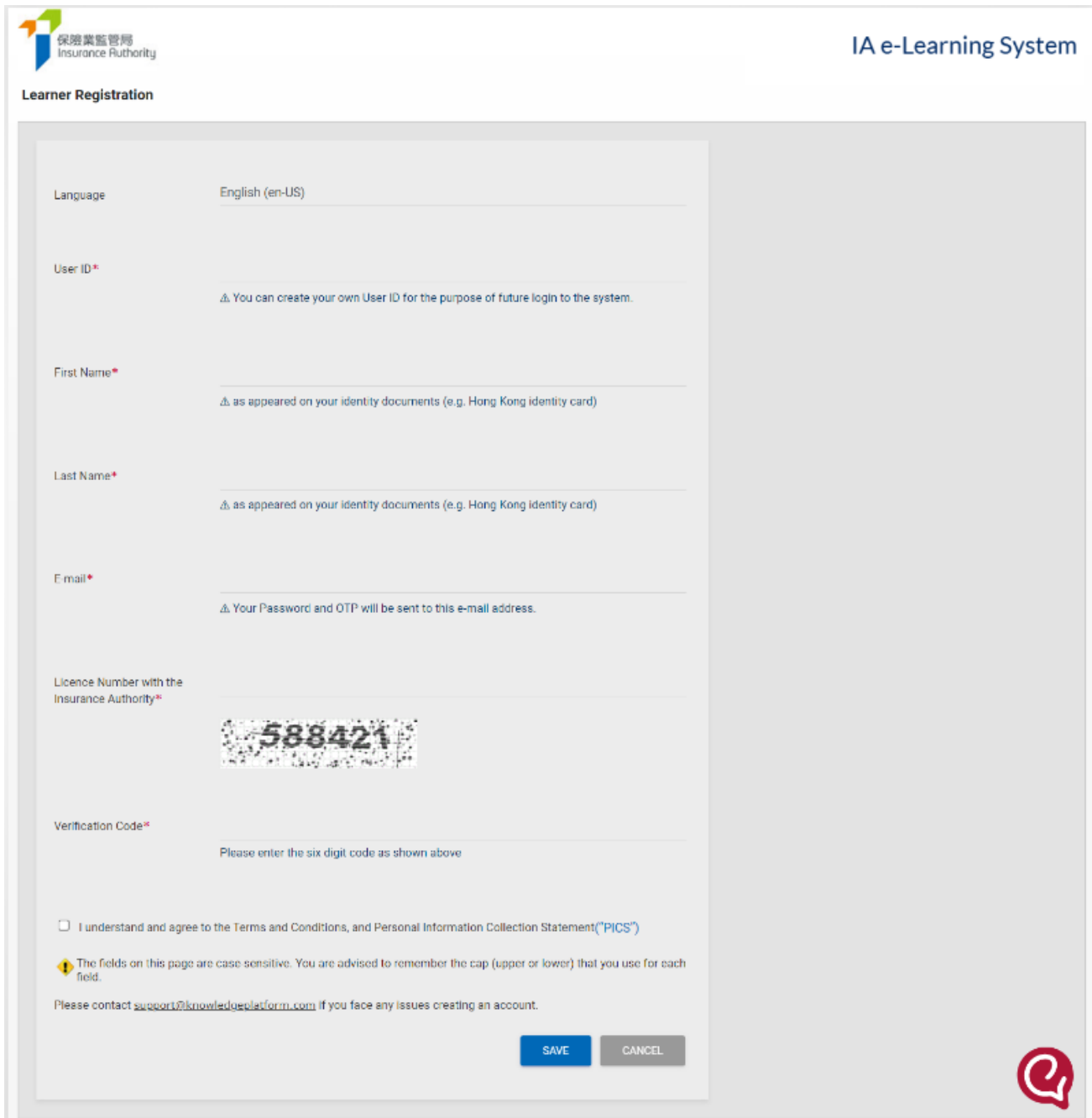
### 3.1. CREATE AN ACCOUNT

As a learner, you are able to create an account by clicking on 'Create an Account' from login screen as shown below.



The screenshot shows the login interface for the Insurance Authority. At the top, there is a logo with the text "保險業監管局 Insurance Authority". Below the logo, it says "Please login to your account." There are two input fields: "Userid" and "Password". The "Password" field has an eye icon to toggle visibility. Below the fields are three buttons: a blue "LOGIN" button, a link "Forgotten Your Password?", and another link "Forgotten your Login User ID?". At the bottom, there is a grey "CREATE AN ACCOUNT" button, which is highlighted by a blue callout box with the text "Create An Account". Below the buttons, there is a link "System Requirements" and a note: "Please contact support@knowledgeplatform.com for any queries." with a mouse cursor pointing to it.

Upon clicking "Create an Account", you will be presenting the following learner registration form. After submitting the form, you will get a welcome email and an email containing password from [localapplications@knowledgeplatform.com](mailto:localapplications@knowledgeplatform.com).



**保險業監管局**  
Insurance Authority

IA e-Learning System

**Learner Registration**

Language English (en-US)

User ID\*  
⚠ You can create your own User ID for the purpose of future login to the system.

First Name\*  
⚠ as appeared on your identity documents (e.g. Hong Kong identity card)

Last Name\*  
⚠ as appeared on your identity documents (e.g. Hong Kong identity card)

E-mail\*  
⚠ Your Password and OTP will be sent to this e-mail address.

Licence Number with the Insurance Authority\*  
588421


Verification Code\*  
Please enter the six digit code as shown above

I understand and agree to the Terms and Conditions, and Personal Information Collection Statement ("PICS")

⚠ The fields on this page are case sensitive. You are advised to remember the cap (upper or lower) that you use for each field.

Please contact [support@knowledgeplatform.com](mailto:support@knowledgeplatform.com) if you face any issues creating an account.

SAVE CANCEL



## 3.2. SYSTEM LOGIN

You need to log into Ultrabot web site before you can access any of its features. You can follow the steps below to login:

1. Go to the specified e-Learning System URL. Before you login, please check if your system meets the requirements for using Ultrabot.
2. You can do so by clicking the link 'System Requirements' on login page.
3. Enter your User ID and Password.
4. Click on the 'Login' button. If your user ID and password are valid, you will be allowed to log into the Ultrabot system.
5. When you first log into the e-Learning System, you will be required to reset your password following the instructions.



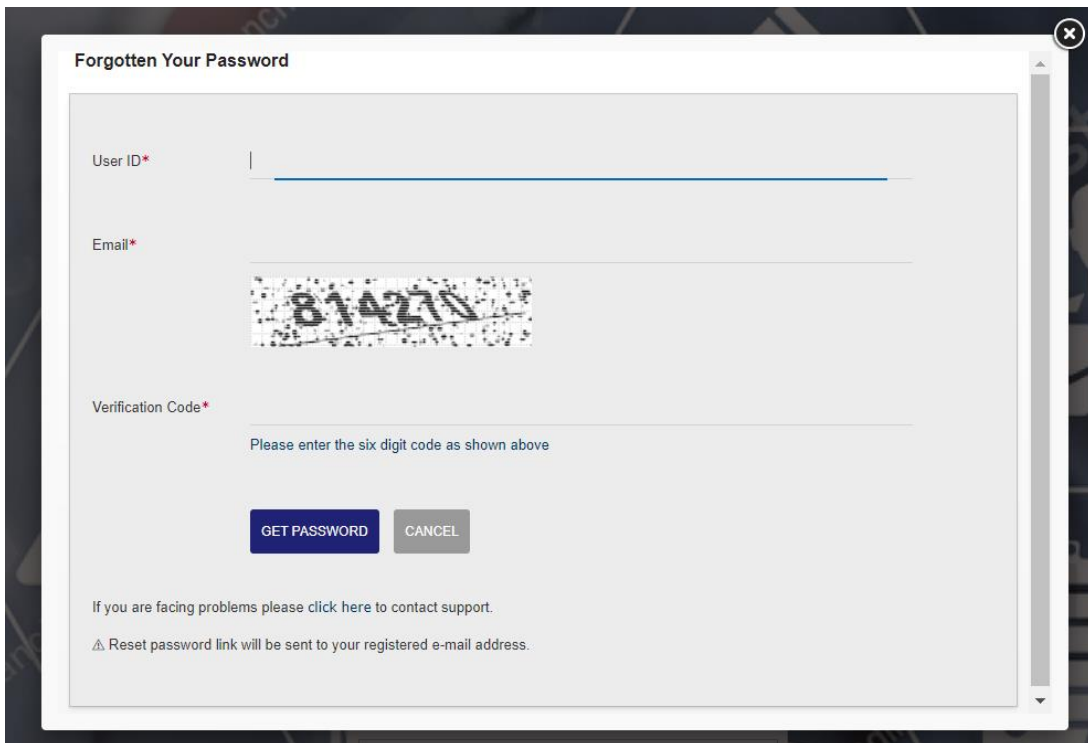
The screenshot shows the login interface for the Insurance Authority. At the top, there is a logo for the Insurance Authority (保險業監管局) with the text 'Insurance Authority'. Below the logo, it says 'Please login to your account.' There are two input fields: 'Userid' and 'Password'. The 'Password' field has an eye icon to toggle visibility. A blue 'LOGIN' button is positioned below the input fields. Below the 'LOGIN' button, there are two links: 'Forgotten Your Password?' and 'Forgotten your Login User ID?'. A grey 'CREATE AN ACCOUNT' button is located below the links. At the bottom, there is a link for 'System Requirements' and a contact email 'support@knowledgeplatform.com' for any queries. Two callout boxes are present: one pointing to the input fields labeled 'User ID and Password' and another pointing to the 'LOGIN' button labeled 'Click "Login" Button'.

User ID and Password

Click "Login" Button

## **Forgot Password**

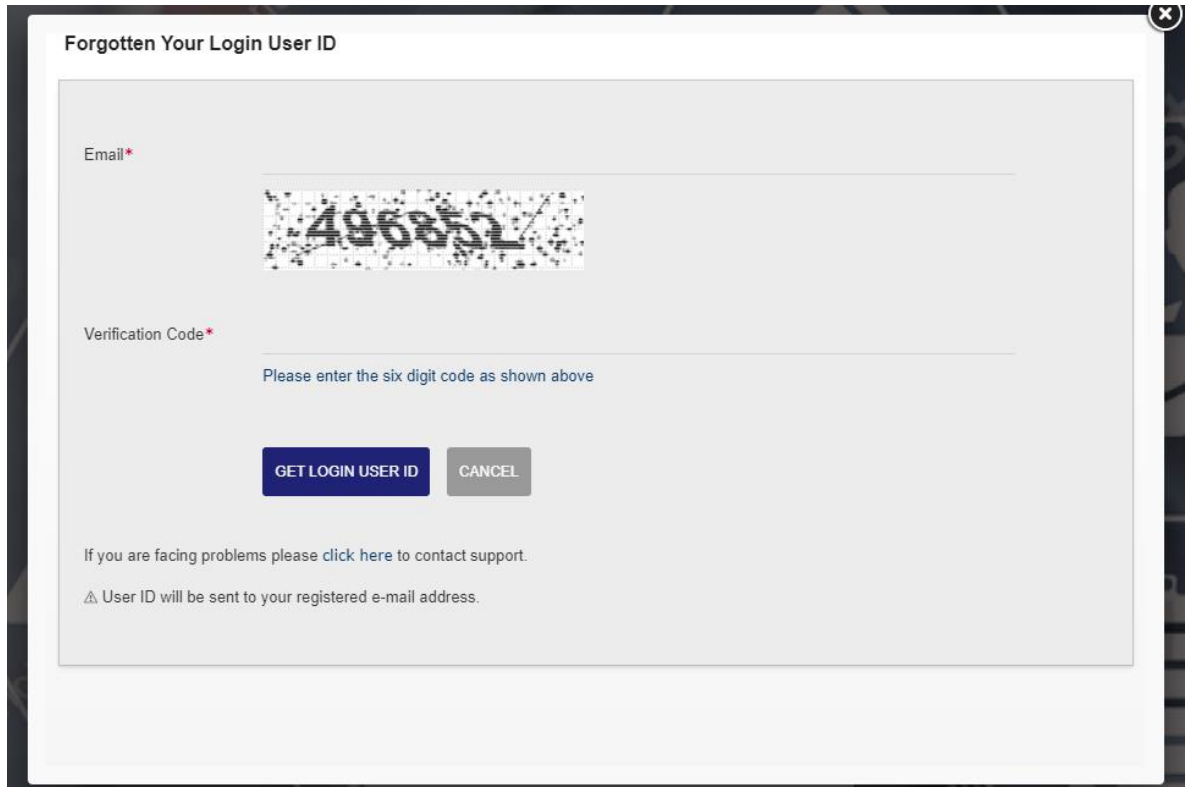
If you have forgotten your account password, click 'Forgot Your Password' from login page. Enter your account User ID, your account E-mail ID, and the verification code, then click on the 'Submit' button. Your account details will be sent to your email address stored in the system at the time of your registration. If your email address is not recorded in the system, you will be prompted with a message. If you still have problems in logging in, click on the link 'If you are facing problems, please click here to contact support' on the Forgotten Your Password page.



The screenshot shows a web form titled "Forgotten Your Password". It contains three input fields: "User ID\*", "Email\*", and "Verification Code\*". The "Verification Code\*" field is pre-filled with a six-digit code "814270" from a CAPTCHA image. Below the fields are two buttons: "GET PASSWORD" (in blue) and "CANCEL" (in grey). At the bottom, there is a link "If you are facing problems please click here to contact support." and a note: "⚠️ Reset password link will be sent to your registered e-mail address."

## **Forgot User ID**

If you have forgotten your account user ID, click 'Forgotten your Login User ID?' from login page. Enter your account E-mail ID, and the verification code, then click on the "Submit" button. Your account details will be sent to your email address stored in the system at time of your registration. If your email address is not recorded in the system, you will be prompted with a message. If you still have problems in logging on, click on the link 'If you are facing problems, please click here to contact support' on the Forgotten Your Login User ID page.



**Forgotten Your Login User ID**

Email\*

495852

Verification Code\*

Please enter the six digit code as shown above

**GET LOGIN USER ID** **CANCEL**

If you are facing problems please [click here](#) to contact support.

⚠ User ID will be sent to your registered e-mail address.



## Note


If the User ID or Password is invalid, you will be prompted to re-enter these fields.

## 3.3. OTP VERIFICATION

---

Once you have managed to login with your User ID and password, you will be prompted to enter a One-time password (OTP) which will be sent to you via your registered E-mail ID.




**保險業監管局  
Insurance Authority**

**IA e-Learning System**

---

Please enter One Time Password (OTP) and click on "Submit" to proceed. The OTP is sent to your registered email address: <a\*c@kp.com>

OTP Token:

---

SUBMIT
CANCEL

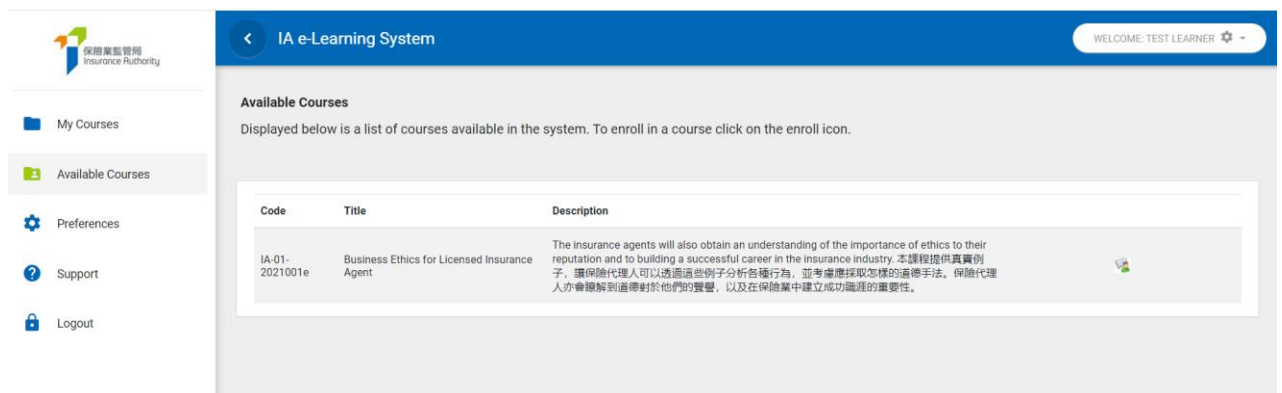
[Resend OTP](#)


Please check your registered E-mail inbox for the OTP code and enter the OTP code in the above field, then proceed by clicking the 'Submit' button.

If you are unable to receive the OTP on your E-mail, please check your E-mail's Junk folder. If you are still unable to receive the OTP or if you suspect that your E-mail ID is incorrect, please send an email to [support@knowledgeplatform.com](mailto:support@knowledgeplatform.com). Your account will be disabled after 3 wrong attempts of OTP, please contact [support@knowledgeplatform.com](mailto:support@knowledgeplatform.com) to unlock the account.

### 3.4. LEARNER'S HOME PAGE

Once the login process has been completed, you will be able to see the 'Learner's Homepage' as indicated in the image below:





- My Courses
- Available Courses
- ⚙️ Preferences
- ❓ Support
- 🔒 Logout

< IA e-Learning System WELCOME: TEST LEARNER ⚙️

**Available Courses**

Displayed below is a list of courses available in the system. To enroll in a course click on the enroll icon.

Code	Title	Description
IA-01-2021001e	Business Ethics for Licensed Insurance Agent	The insurance agents will also obtain an understanding of the importance of ethics to their reputation and to building a successful career in the insurance industry. 本課程提供真實例子，讓保險代理人可以透過這些例子分析各種行為，並考慮應採取怎樣的道德手法。保險代理人亦會瞭解到道德對於他們的聲譽，以及在保險業中建立成功職涯的重要性。

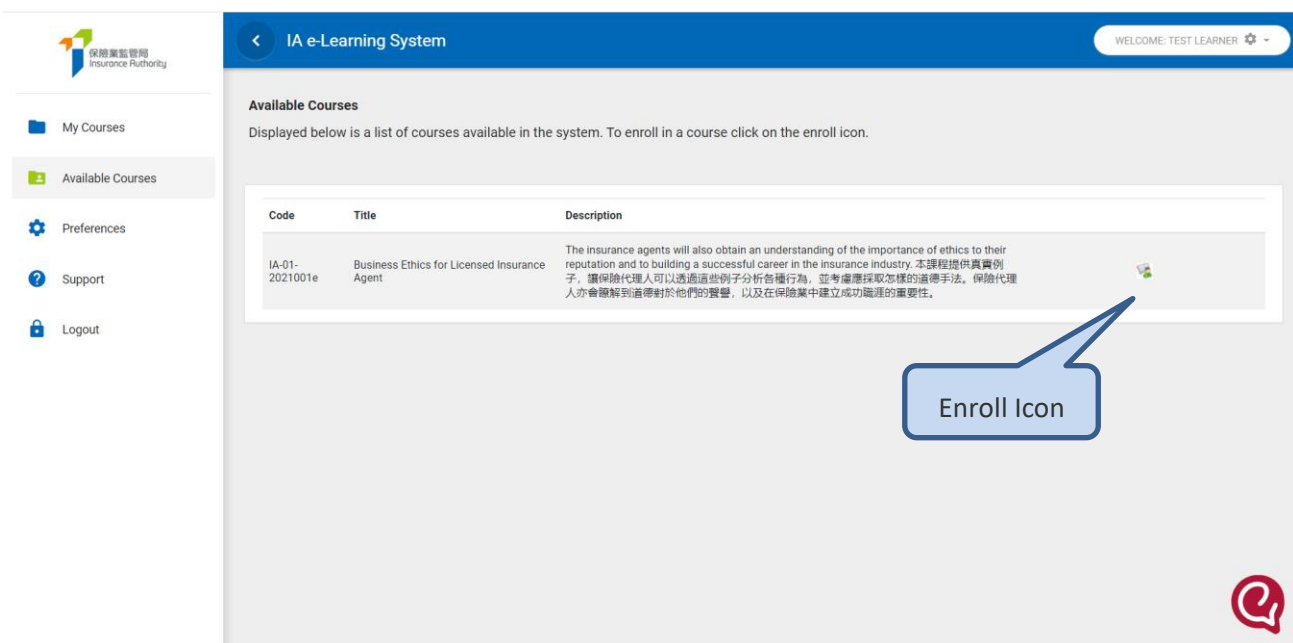
## 3.5. LOG OUT

Please observe the following steps to properly log off the system:

1. Click 'Logout' from the main menu.
2. You will be directed to the Login screen, indicating that the system has successfully logged you out of the Ultrabot. All your settings and profile information will remain unchanged.

## 4. AVAILABLE COURSE

The 'Available Courses' on the menu provides you a list of courses to which you can enroll yourself.



**IA e-Learning System** WELCOME: TEST LEARNER

**Available Courses**  
Displayed below is a list of courses available in the system. To enroll in a course click on the enroll icon.

Code	Title	Description
IA-01-2021001e	Business Ethics for Licensed Insurance Agent	The insurance agents will also obtain an understanding of the importance of ethics to their reputation and to building a successful career in the insurance industry. 本課程提供真實例子，讓保險代理人可以透過這些例子分析各種行為，並考慮採取怎樣的道德手法。保險代理人亦會瞭解到道德對於他們的聲譽，以及在保險業中建立成功職業的重要性。

Enroll Icon

You can enroll yourself to 'Self-Enrollment Courses' by the following steps:

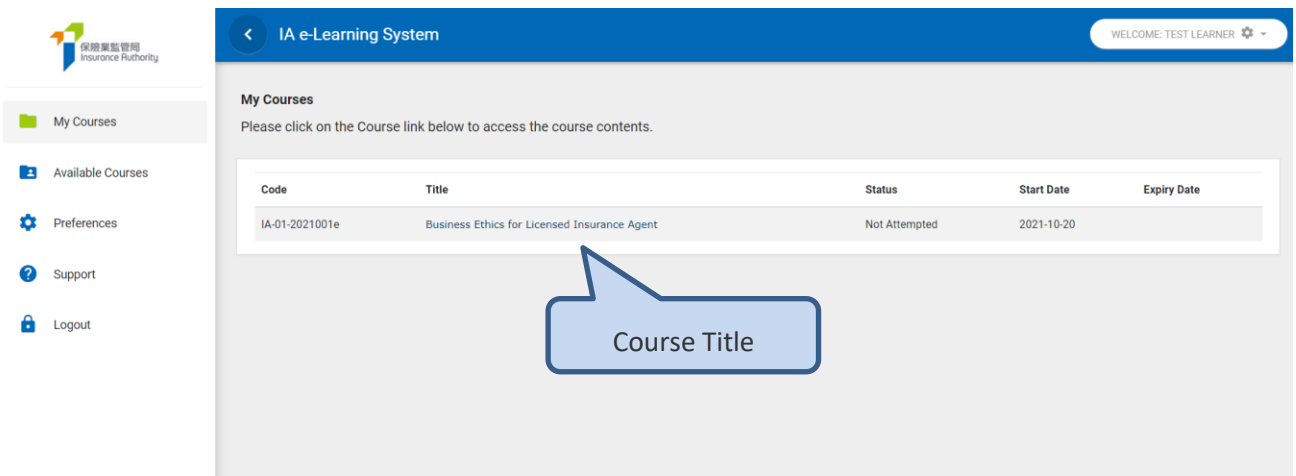
1. After logging into Ultrabot, click 'Available Courses' from main menu.
2. This page will display all the courses that are available for learner in form of a table. Each row displays data for a course, with information on course code, course title and description.
3. To enroll a course to yourself, click on the 'Enroll' icon against it.

4. If the course requires approval from training managers for enrollment, the course will be assigned to you only when any of the 'Approval Authorities' approves the enrollment. If approval is not required for the course, it will be assigned to you right away.
5. The 'Enroll' button against a course will change to text 'Enrolled' when a course is assigned to you.
6. You will be able to cancel the enrolment request after submitting.

## 5. MY COURSES

Ultrabot learner interface consists of course content modules which are assigned to the learner. Learner should go through and complete the E-Learning content assigned.

### 5.1. VIEW COURSES



The screenshot shows the 'IA e-Learning System' interface. On the left is a navigation menu with options: My Courses, Available Courses, Preferences, Support, and Logout. The main content area is titled 'My Courses' and includes the instruction: 'Please click on the Course link below to access the course contents.' Below this is a table with the following data:

Code	Title	Status	Start Date	Expiry Date
IA-01-2021001e	Business Ethics for Licensed Insurance Agent	Not Attempted	2021-10-20	

A callout box labeled 'Course Title' points to the 'Title' column of the table.

You can view your assigned courses by the following steps:

1. After logging into Ultrabot, click 'My Courses' from main menu.
2. The courses will be listed, and each row displays data for a course, with information on course code, course title, description, status, last viewed date and expiry date. Course status shows different stages of course progression. Course status can have the following values:

- **Not Attempted:** Course status remains 'Not Attempted' till you start the course.
  - **Incomplete:** After the course is viewed for the first time, its status will change to 'Incomplete'.
  - **Completed:** Incomplete course status will change to 'Completed', when all the course modules have been fully viewed and the assessment at the end of the course has been completed.
3. Click on the course title to access it.
  4. You will not be able to click on course if you have completed the course.
  5. You will have to contact to support/administrator to unlock the course again.
  6. Your will be able to download a course completion certificate after completing a course from the course list.

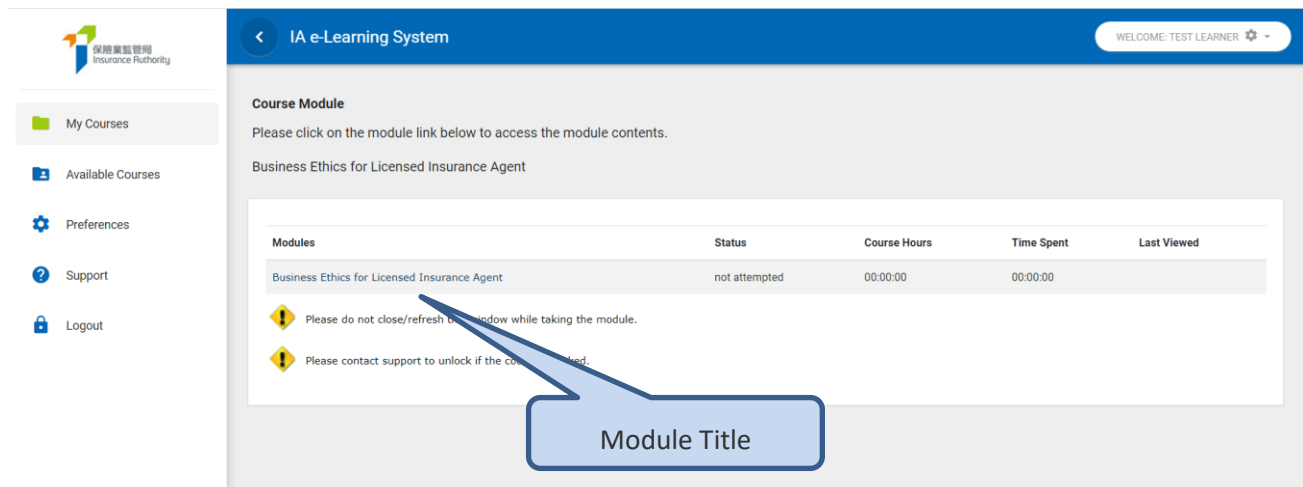
## 5.2. VIEW COURSE MODULES

---

To access modules for a course, you can follow the steps below:

1. After logging into Ultrabot, go to 'My Courses'.
2. Launch the desired course by clicking on course title link. You will be directed to the course module page, which lists all its modules.
3. The course module page also lists the module title, status, course hours, time spent and last viewed date for each module in form of a table. Module status can take of any of the following values:
  - **Not Attempted:** Module status will remain 'not attempted' until you start the module.
  - **Incomplete:** This status means that module has been started but not completed.
  - **Completed:** When a module is completely viewed, its status turns to completed.
  - **Failed:** If you fail the course assessment till fourth attempt, the status will change to 'failed' and you will not be able to launch it further. In that case, you will have to contact support team to unlock the course and our support team will re-assign that course to you.

4. Click on the respective link to start any module. Each module launches in a pop-up window. If a module window is open and you launch another one, a new module will open in the same window. It is therefore preferable to close any open module window before launching a new one.
5. You will be able to see the time spent on a module and course hours required for the specific course.



**Course Module**  
Please click on the module link below to access the module contents.

Business Ethics for Licensed Insurance Agent

Modules	Status	Course Hours	Time Spent	Last Viewed
Business Ethics for Licensed Insurance Agent	not attempted	00:00:00	00:00:00	

⚠ Please do not close/refresh the window while taking the module.

⚠ Please contact support to unlock if the course is locked.

Module Title

### Note

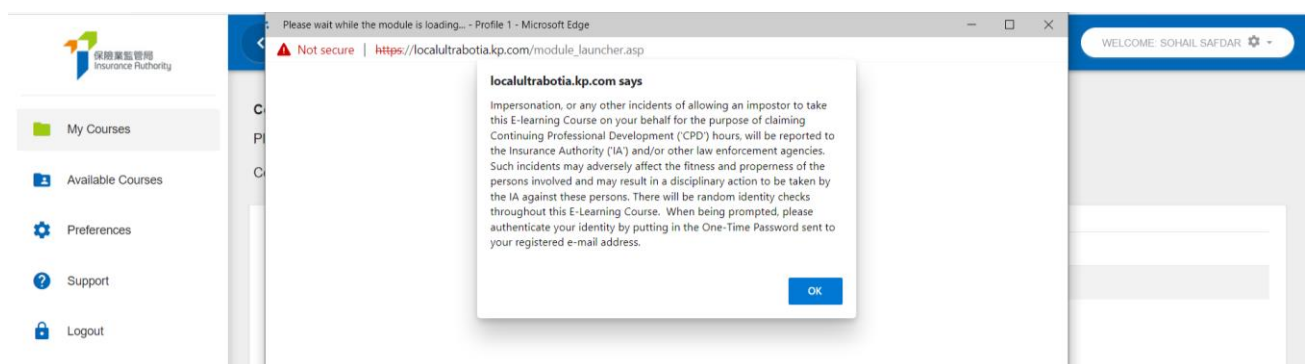
The following are a few points that you should keep in mind before taking the modules.

1. When you click a module link from course module, the module launches in a new window. Do not refresh, close or logout main Ultrabot window while taking the modules.
2. To track your module status as completed, you should make sure that you have gone through the module completely i.e., up till the last section.
3. There is no time limit in between modules - you can start each individual module at your convenience. If you leave the system idle for more than 30 minutes, your session will be expired, and you will be redirected to login page.
4. If your module window hangs due to slow connection or some other problems with your computer, please close the Ultrabot window, then access the website again and launch the module. Most e-Learning courses have book marking feature enabled and you are not required to go through the contents you have already covered.

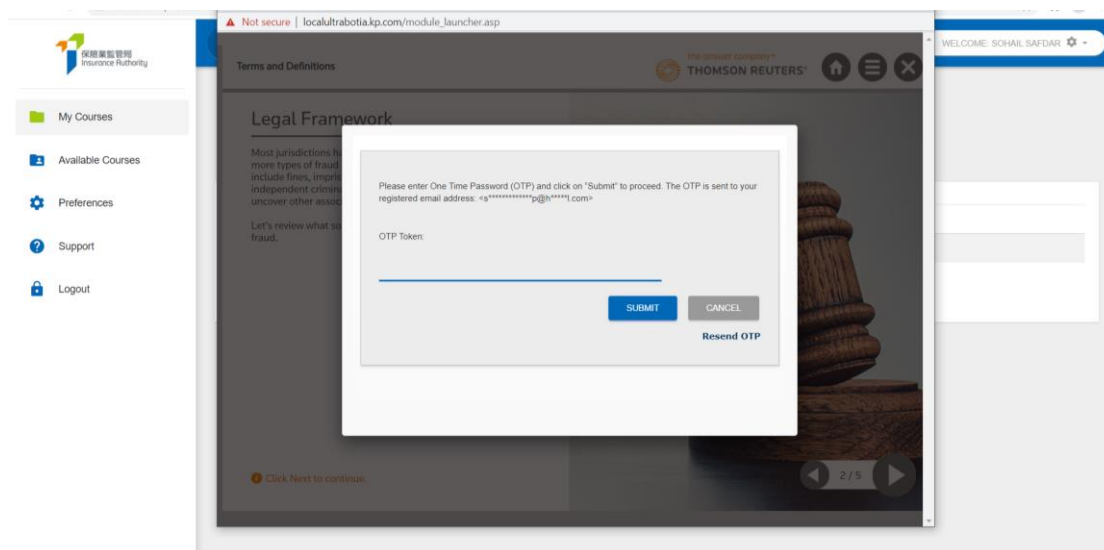
## 5.3. CONTINUAL AUTHENTICATION

The continual authentication will be implemented in the e-Learning System to revalidate your identity as a learner during your interaction with the course. The system will revalidate your identity by asking you to provide an OTP sent to your registered email address during course interaction.

At the start of the course, you will be notified by a warning message as shown below.



There will be random identity checks throughout the e-Learning Course. When being prompted as shown below, please authenticate your identity by entering the OTP sent to your registered e-mail address.

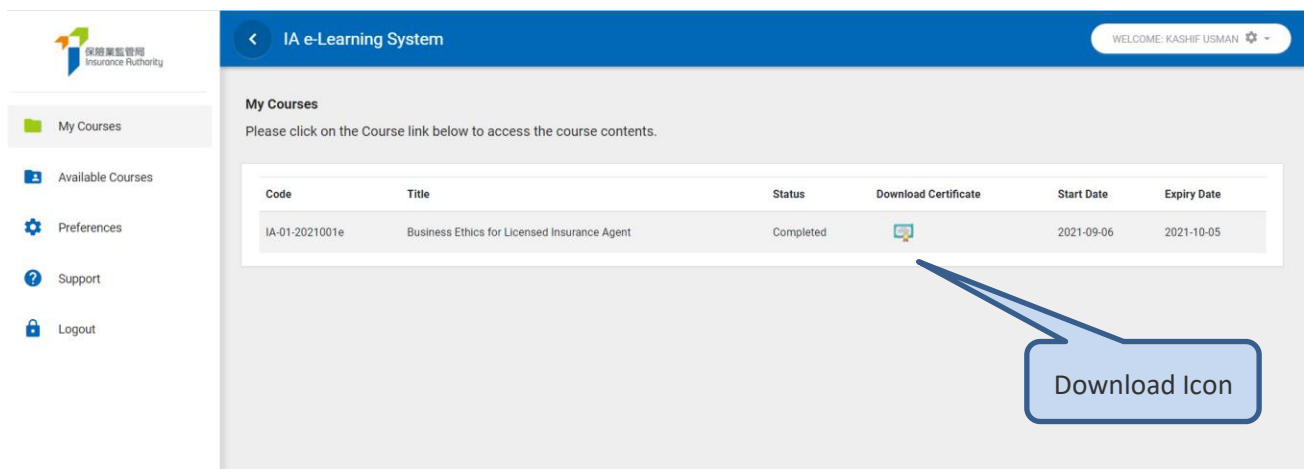


You will be allowed to proceed only after the successful credential verification. If you fail to provide the correct credential, you will be logged out from the system after 3 wrong attempts.

## 6. DOWNLOAD COURSE CERTIFICATE


You will be able to download course certificate after course completion.

1. After logging into Ultrabot, go to 'My Courses'.
2. There will be an option to download certificate for those courses with a status marked as 'completed' as shown below.
3. Certificate will be generated in PDF format and downloaded from the learning system.



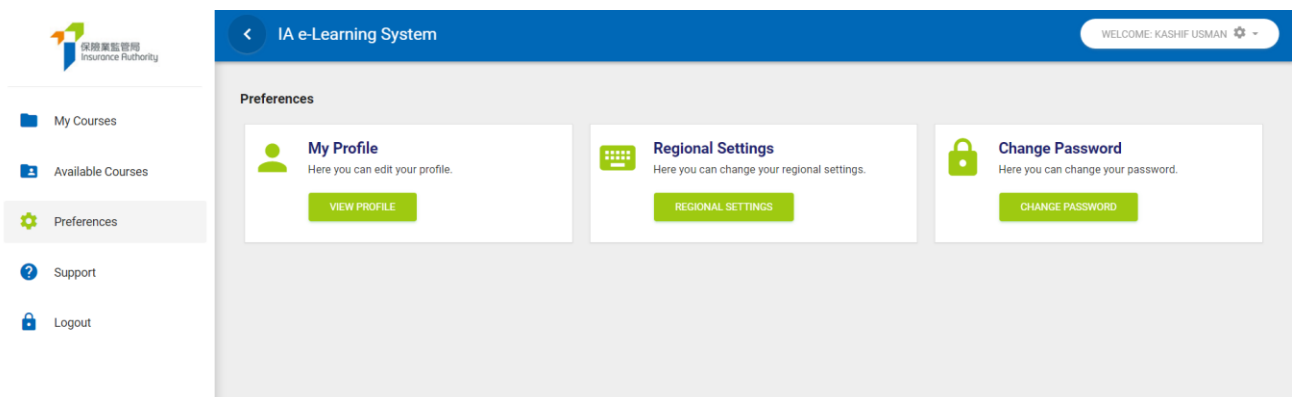
**IA e-Learning System** WELCOME: KASHIF USMAN

**My Courses**  
Please click on the Course link below to access the course contents.

Code	Title	Status	Download Certificate	Start Date	Expiry Date
IA-01-2021001e	Business Ethics for Licensed Insurance Agent	Completed		2021-09-06	2021-10-05

Download Icon

## 7. PREFERENCES



**IA e-Learning System** WELCOME: KASHIF USMAN

**Preferences**

**My Profile**  
Here you can edit your profile.  
[VIEW PROFILE](#)

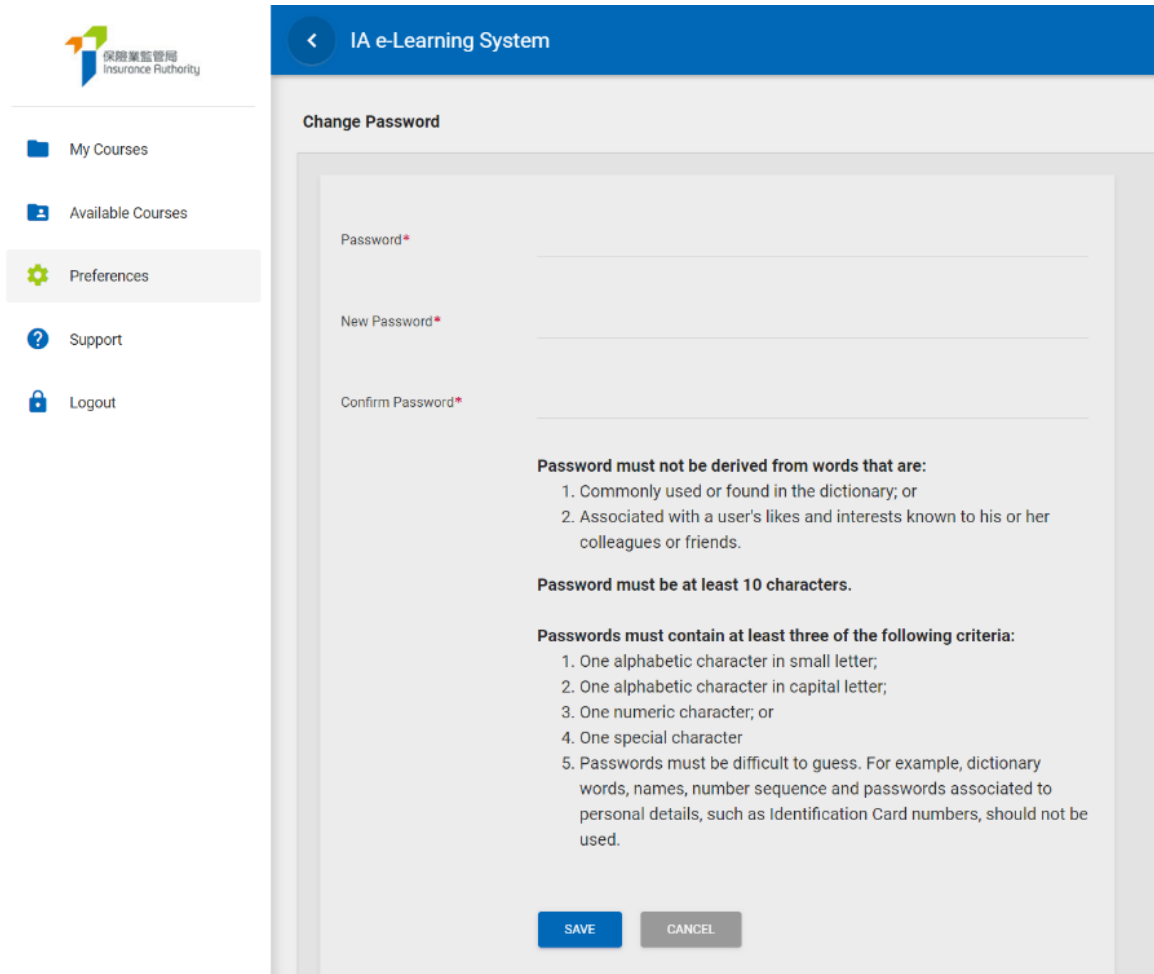
**Regional Settings**  
Here you can change your regional settings.  
[REGIONAL SETTINGS](#)

**Change Password**  
Here you can change your password.  
[CHANGE PASSWORD](#)

## 7.1. CHANGE PASSWORD

Observe following steps to change your login password:

1. From the main menu, go to 'Preferences'.
2. Click 'Change Password'.
3. Fill in the fields for old password, new password and confirm new password. Please note that your password must be at least 10 characters.
4. Click 'Save' button to store the new password into the system. If you do not wish to change password at this stage, click 'Cancel' button to revert.
5. If the information provided in the fields is valid, your account password will be changed, and you will be directed to the 'Preferences' main page. Use the new password when you try to access the system again.



IA e-Learning System

### Change Password

Password\*

New Password\*

Confirm Password\*

**Password must not be derived from words that are:**

1. Commonly used or found in the dictionary; or
2. Associated with a user's likes and interests known to his or her colleagues or friends.

**Password must be at least 10 characters.**

**Passwords must contain at least three of the following criteria:**

1. One alphabetic character in small letter;
2. One alphabetic character in capital letter;
3. One numeric character; or
4. One special character
5. Passwords must be difficult to guess. For example, dictionary words, names, number sequence and passwords associated to personal details, such as Identification Card numbers, should not be used.

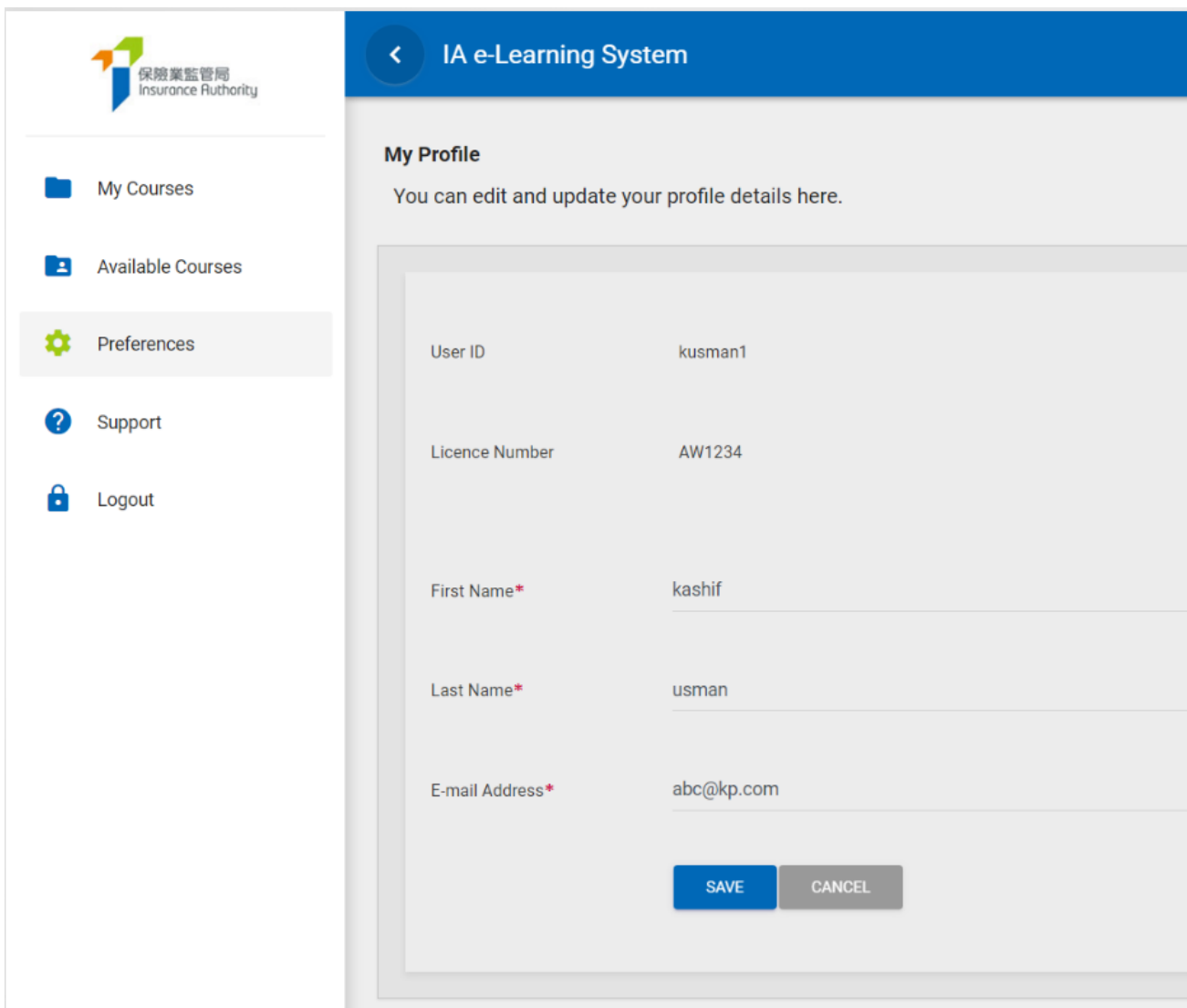
SAVE CANCEL



## 7.2. MY PROFILE SETTINGS

You can change my profile settings by the following steps:

1. From the main menu, go to 'Preferences'.
2. Click 'View Profile'.
3. Change your First Name and Last Name.
4. Change your E-mail Address.
5. Click 'Save'.



The screenshot shows the 'My Profile' settings page in the IA e-Learning System. The page is divided into a left sidebar and a main content area. The sidebar contains the Insurance Authority logo and navigation options: My Courses, Available Courses, Preferences (highlighted), Support, and Logout. The main content area has a blue header with a back arrow and the text 'IA e-Learning System'. Below the header, the title 'My Profile' is followed by the instruction 'You can edit and update your profile details here.' The profile details are displayed in a table-like format with the following information:

User ID	kusman1
Licence Number	AW1234
First Name*	kashif
Last Name*	usman
E-mail Address*	abc@kp.com

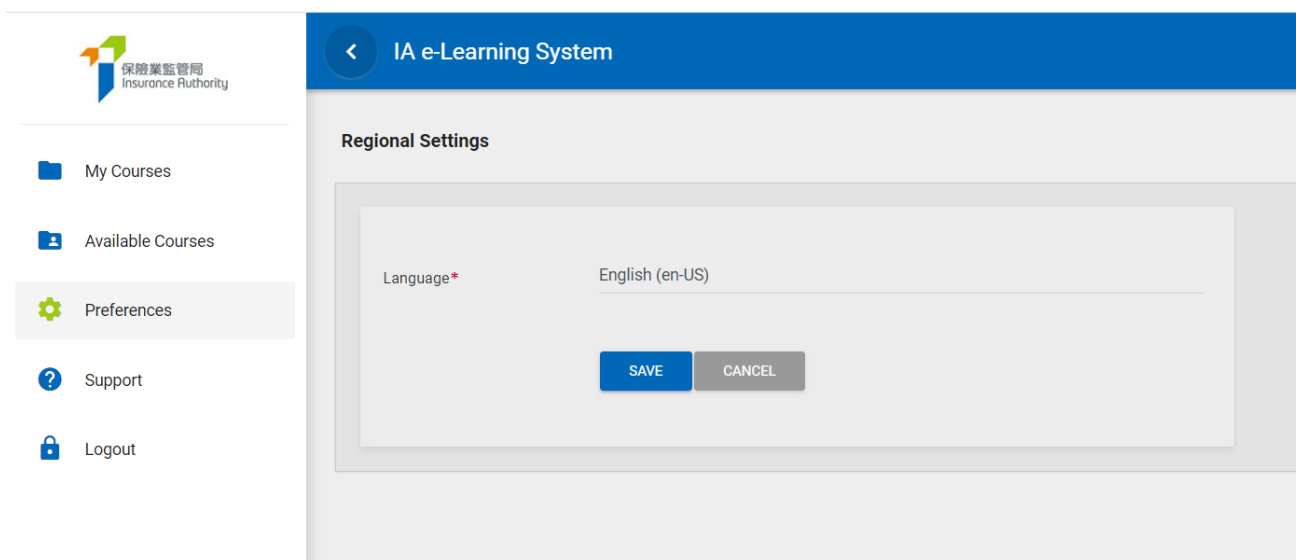
At the bottom of the form, there are two buttons: 'SAVE' (in blue) and 'CANCEL' (in grey).

## 7.3. REGIONAL SETTINGS

---

You can change “regional settings” by the following steps:

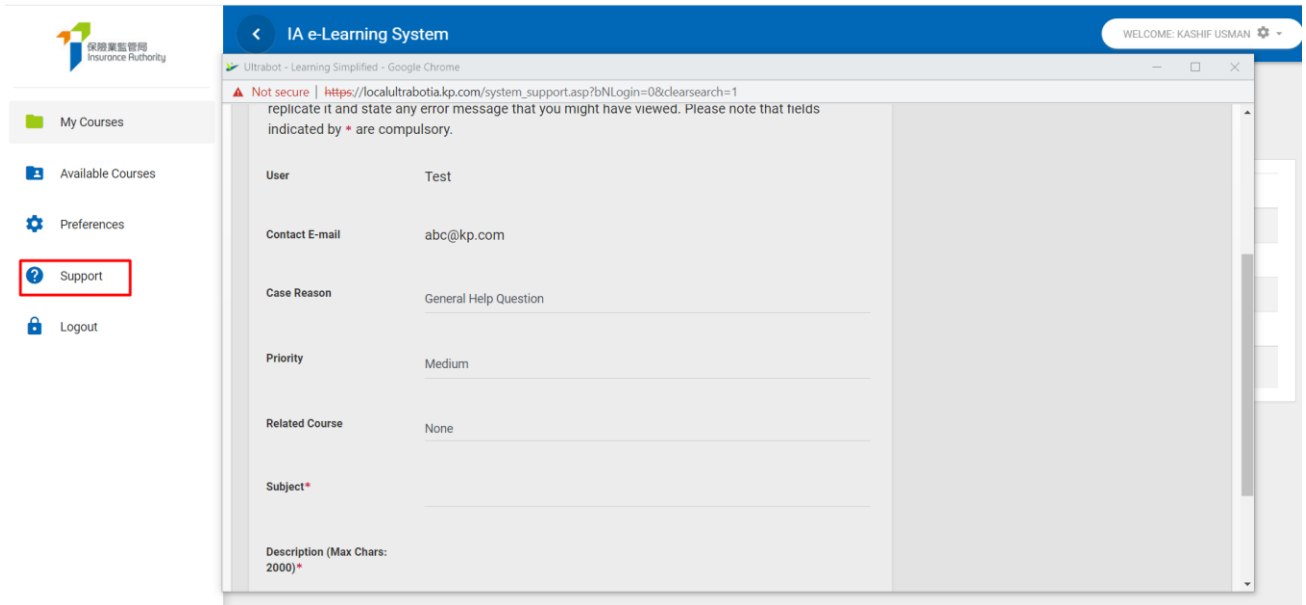
1. From the main menu, go to 'Preferences'.
2. Click 'Regional Settings'.
3. Select the desired language.
4. Click 'Save'.



## 8. SUPPORT

---

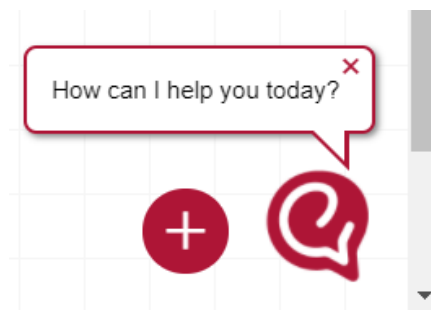
In case you have any queries or are facing any sort of troubles, you can contact our support team by accessing our support tab in the menu below. You may fill the support form and submit your request accordingly, a representative from our support team will then reach out to you via E-mail. The support tab and support form are indicated in the image below:



You may also send us your queries at [support@knowledgeplatform.com](mailto:support@knowledgeplatform.com) and a representative will get back to you.

## 8.1. ENGATI SUPPORT

Our Ultrabot system is also incorporated with a third-party support chatbot developed by Engati. The Engati chatbot consists of preloaded FAQs (Frequently asked questions) and their subsequent answers in both English and Chinese language. You can select your preferred language and proceed to select the relevant question from a list of options. The chatbot will then respond and guide you accordingly. The Engati support chat will appear at the bottom right of the screen indicated by the logo as in the image below., you can simply click on the logo to open the chat window:



*In confidence, Knowledge Platform, 2021*

*All Rights Reserved [www.knowledgeplatform.com](http://www.knowledgeplatform.com)*