



Huat Pilot Test

A Brief Tutorial

Welcome to the Huat Pilot Test. Thank you for signing up to be part of this project. Your contribution will help us tremendously in bringing this project from a mere concept to a full-fledged product.

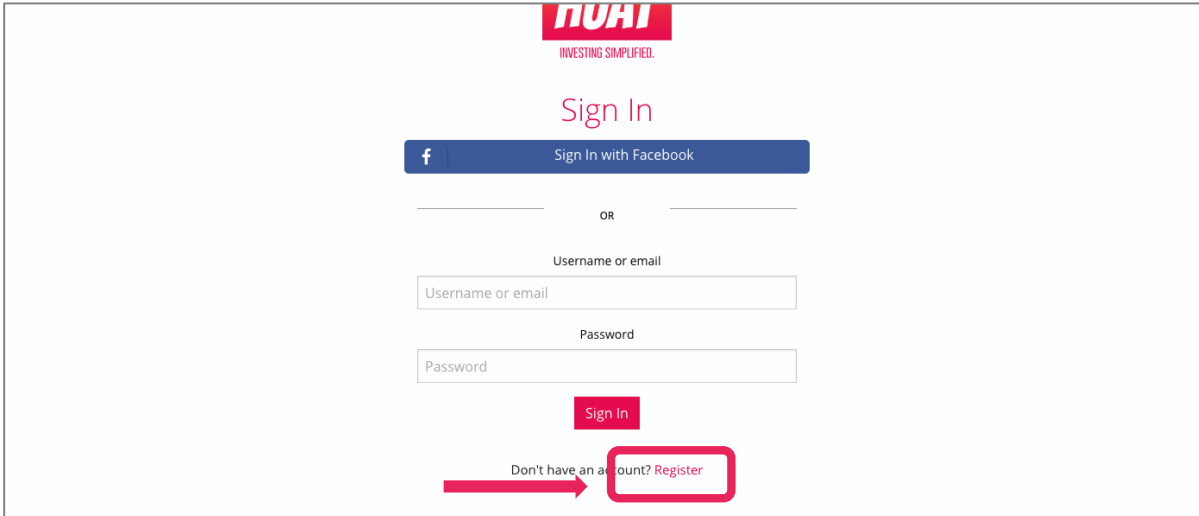
This tutorial will serve as an instructional guide for using the platform in the most effective way. However, exploring it beyond is entirely up to you.

So if you are ready, **let's begin!**

Registration

Before you can begin, you will need to register yourself onto the platform.

1. Enter the following IP Address on your browser (preferably Chrome):
<https://128.199.224.32/>
2. You will see the following log in screen on your browser. Click on the link below which says **“Register”**.



NUHI
INVESTING SIMPLIFIED.

Sign In

Sign In with Facebook

OR

Username or email

Username or email

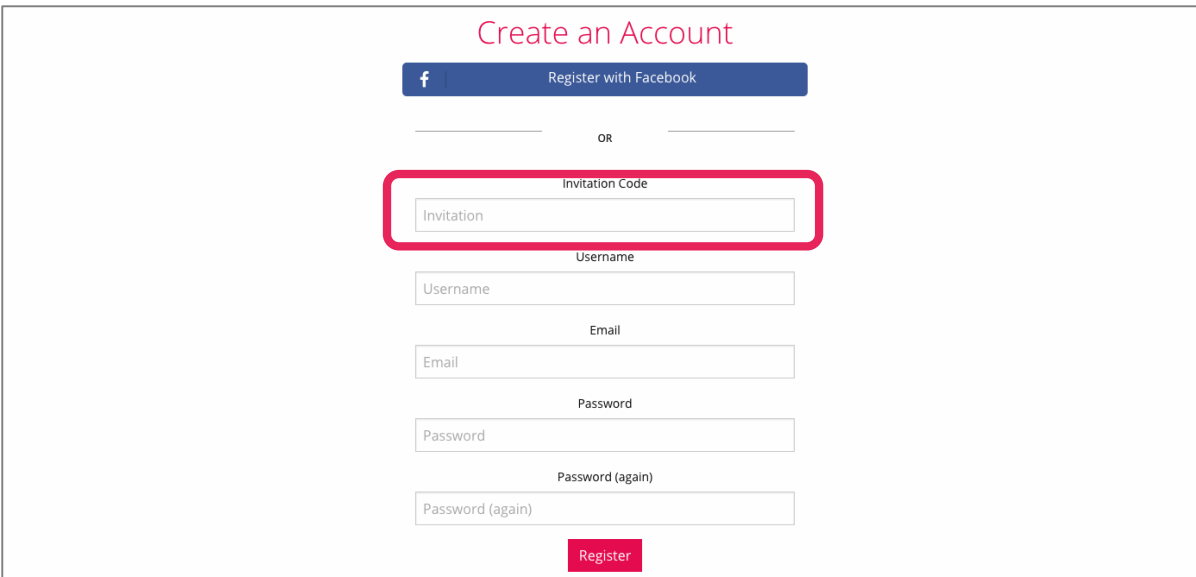
Password

Password

Sign In

Don't have an account? **Register**

3. Once on the registration page, you will need to enter the invitation code sent to you through the email. This will verify that you are part of this pilot test, giving you the exclusive rights to use the platform.



NUHI
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Create an Account

Register with Facebook

OR

Invitation Code

Invitation

Username

Username

Email

Email

Password

Password

Password (again)

Password (again)

Register

4. Once you fill up the other necessary details, click **“Register”**.

Profiling

Basic profiling and risk profiling will allow us to know you better.

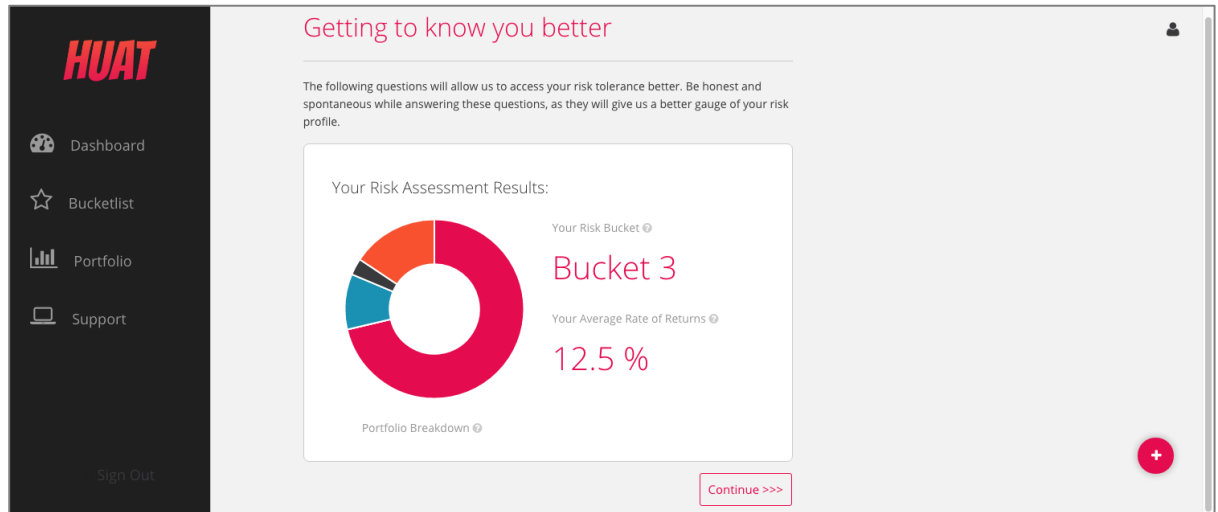
1. Once registration is successful, you will be able to see the following screen. Fill in your details and click **“Continue”**.

The screenshot shows the HUAT application interface. On the left is a dark sidebar with the HUAT logo and navigation links: Dashboard, Bucketlist, Portfolio, and Support. At the bottom of the sidebar is a 'Sign Out' link. The main content area is titled 'Some Basic Information' in pink. Below the title is a sub-header: 'Here we will need you to fill in some general details about yourself in order for us to profile you accurately. Do note that all information is kept strictly confidential.' The form contains several sections: 'Gender' with radio buttons for Male and Female; 'Marital Status' with radio buttons for Married, Single, and Other; 'Age Group' with radio buttons for 0-17, 18-29, 30-49, and >50; 'Net Monthly Income (in SGD)' with a text input field containing '3000.00'; and 'Average Monthly Expenditure (in SGD)' with a text input field. A red circular button with a white plus sign is located in the bottom right corner of the main content area.

2. Once the basic information is filled up, you will proceed with the risk profiling assessment, where you will be asked a series of questions and asked to select one out of two options.

The screenshot shows the HUAT application interface. On the left is a dark sidebar with the HUAT logo and navigation links: Dashboard, Bucketlist, Portfolio, and Support. At the bottom of the sidebar is a 'Sign Out' link. The main content area is titled 'Getting to know you better' in pink. Below the title is a sub-header: 'The following questions will allow us to access your risk tolerance better. Be honest and spontaneous while answering these questions, as they will give us a better gauge of your risk profile.' The form contains a question: 'My company is laying off employees. I see this as'. Below the question are two buttons: 'Uncertainty of my next paycheck' and 'Opportunity to move on'. A red circular button with a white plus sign is located in the bottom right corner of the main content area.

- Once completed, you can see your risk assessment result, and your average annual rate of returns for your portfolio.

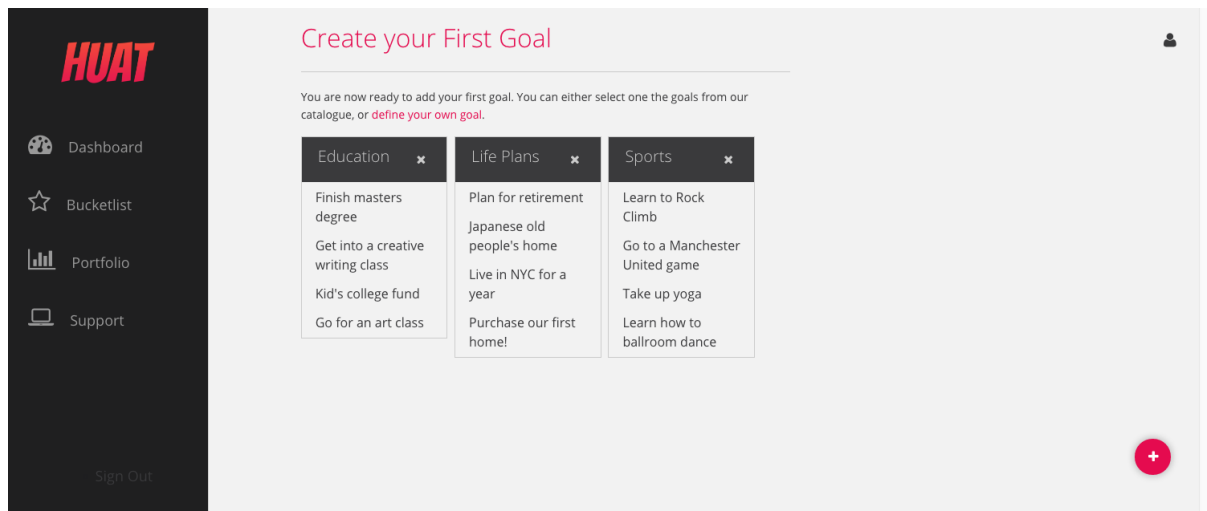


- Now that the profiling is completed, you can proceed with adding your first goal!

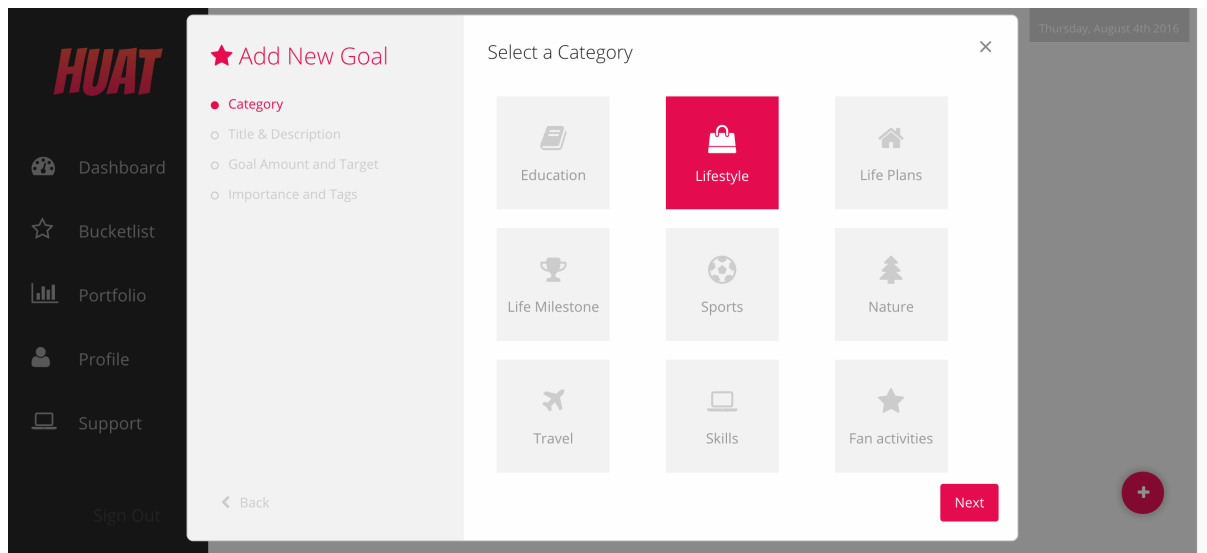
Adding a Goal

Setting targets within your bucketlist that you can achieve

1. Straight after profiling, you will be presented with a few recommended goals that you can select from, otherwise create your own custom goal.



2. On every page on the HUAT platform, you should see a “+” symbol in the bottom right. This is the button to add a goal.
3. First select a category that is most relevant to the goal that you wish to set.



4. Next, give your goal a title and description. This will help you have a better sense of the reasons for setting these goals.

The screenshot shows the 'Add New Goal' form in the HUAT application. The left sidebar contains navigation links: Dashboard, Bucketlist, Portfolio, Profile, Support, and Sign Out. The main content area is titled 'Add New Goal' and has a progress indicator with four steps: Category, Title & Description (active), Goal Amount and Target, and Importance and Tags. The form is titled 'What do you want to achieve?' and contains two input fields: 'Title of Goal' with the text 'Donate to Hair for Hope' and 'Description' with the text 'Shave bald at the end of the year to contribute to the Hair for Hope Project.' At the bottom of the form are 'Back' and 'Next' buttons. A red circular button with a plus sign is visible in the bottom right corner of the application interface.

- Next, set a target value and date for your goal. This is an important step, which will allow us to calculate the monthly amount that you will need to invest to reach this goal. Once you find a reasonable amount, by tweaking the deadline, click "Top Up" before proceeding to the final step.

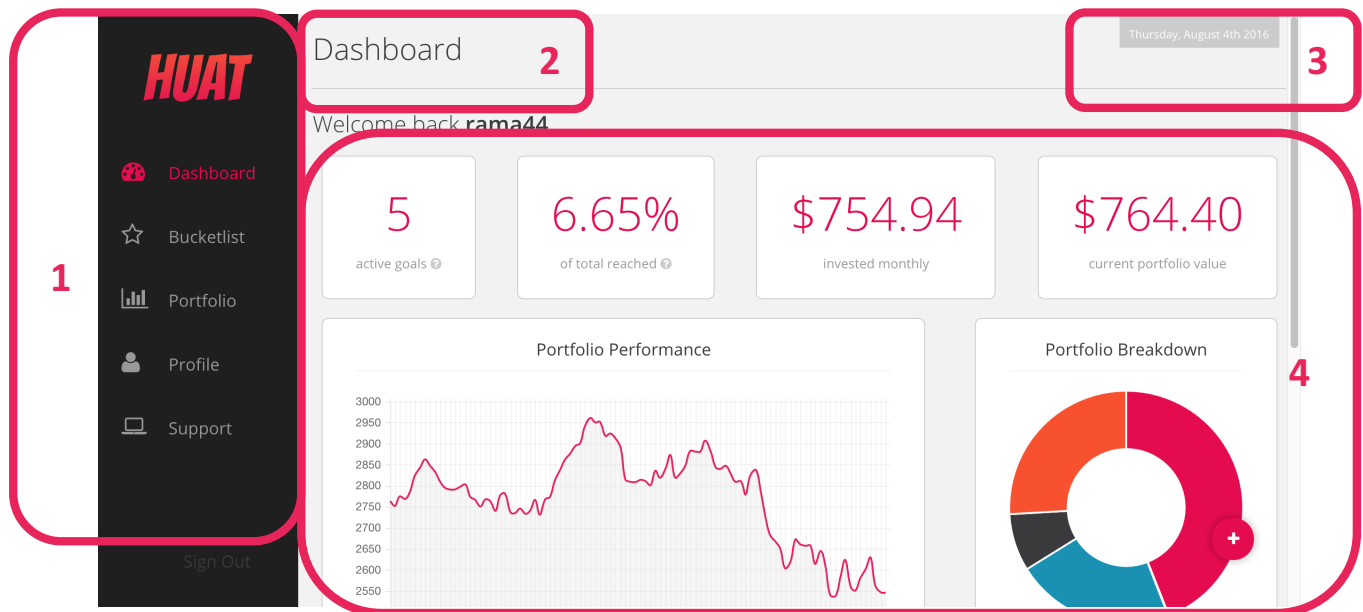
The screenshot shows the 'Add New Goal' form in the HUAT application, now at the 'Goal Amount and Target' step. The progress indicator shows 'Goal Amount and Target' as the active step. The form is titled 'What are your targets?' and contains two input fields: 'Amount (in SGD)' with the value '1000' and 'Target Month' with the value 'December'. The 'Target Year' is set to '2017'. Below these fields, a message states: 'Target date is calculated based on your investment amount. Click to reset date.' A box displays the calculated amount: 'In order to reach this target, you need to top up \$ 55.95'. A red 'Top Up' button is next to this amount. At the bottom of the form are 'Back' and 'Next' buttons. The background of the application interface shows a portfolio value of '764.40' and a 'Breakdown' chart.

- Finally choose an importance level, and add a few tags that you might find relevant, and you're good to start investing in your goals!

Goal Management

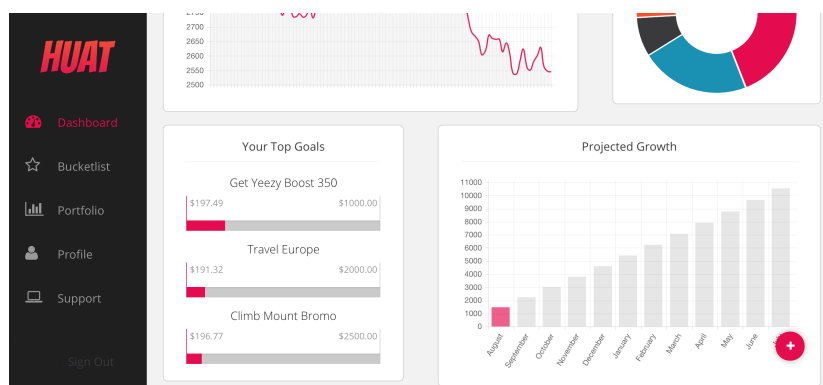
The multi-faceted tools on the interface that allow you to track and monitor your progress over time.

Interface Layout



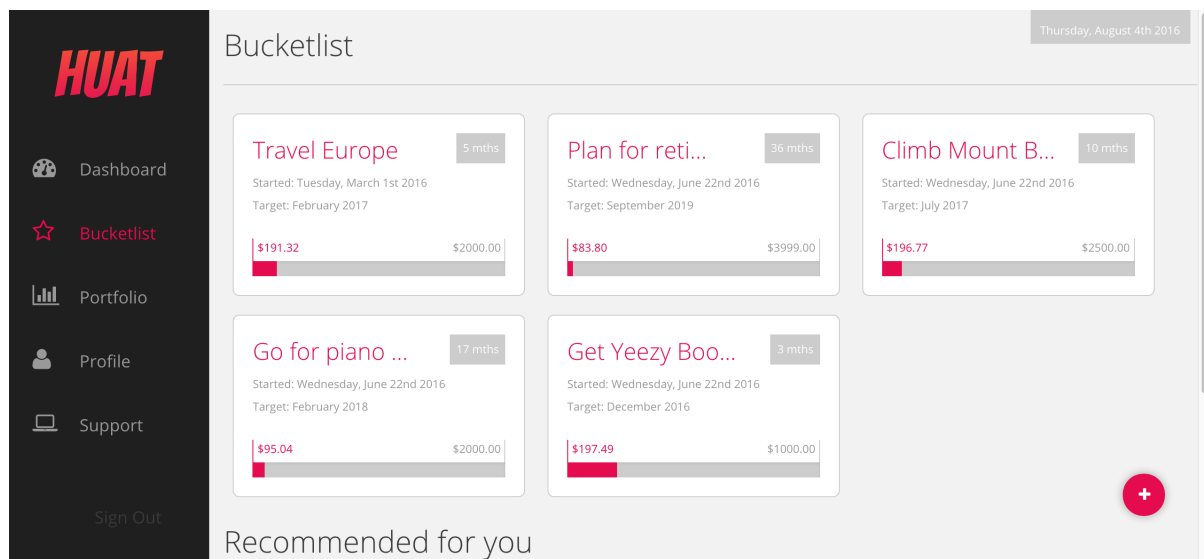
1. Sidebar – this will be the primary mode of navigation across the entire platform, allowing you to access the different views instantaneously.
2. Page Header – The header is indicative of the current page that you are on.
3. Virtual Date – As the platform will be running on an accelerated timeline, this date will allow you to keep track of the virtual time period.
4. Main content – This is where the main content of each page lies.

Dashboard



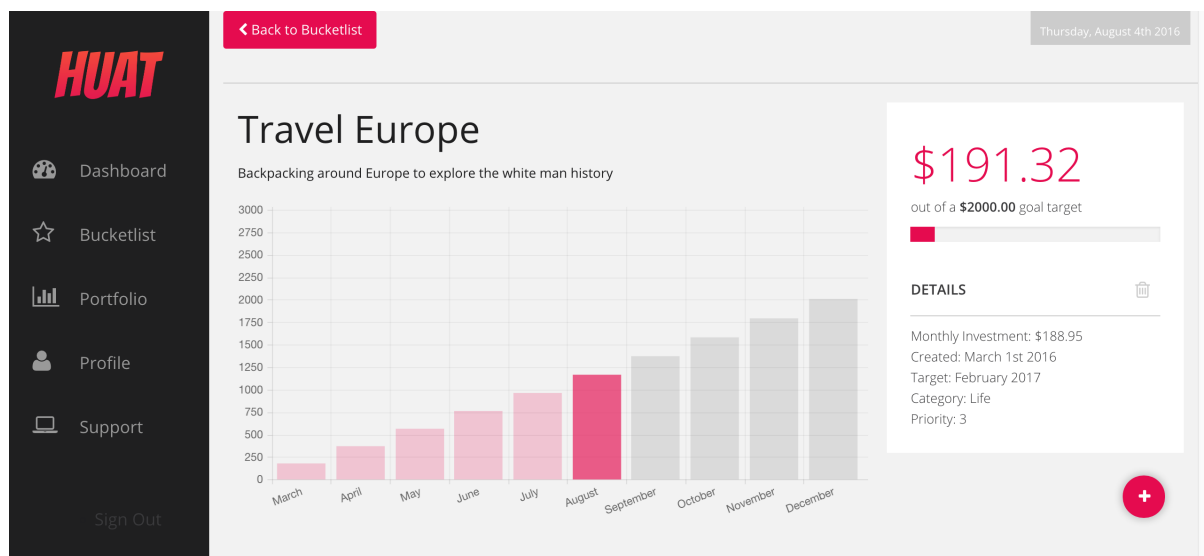
The dashboard is the home of the platform. You can monitor the performance of your top goals, overall investment trends, as well as you portfolio, on this page.

Bucketlist



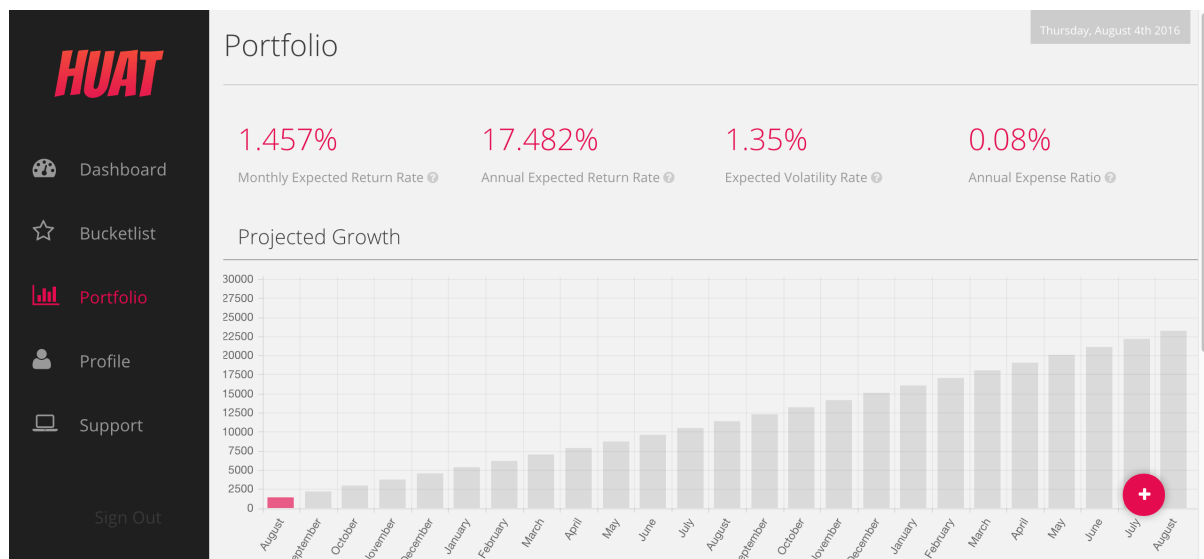
The Bucketlist keeps track of your goals and showcases the timeline and progress of each goal. You can use this view to get an overview on the performance of your goals. In order to view more details, select the title of the goal.

Goal Page



The goal page gives you a comprehensive analysis of the projected performance of your goal, as well as the current progress of the goal. Here, you can also choose to delete a goal, by selecting the "Trash Icon".

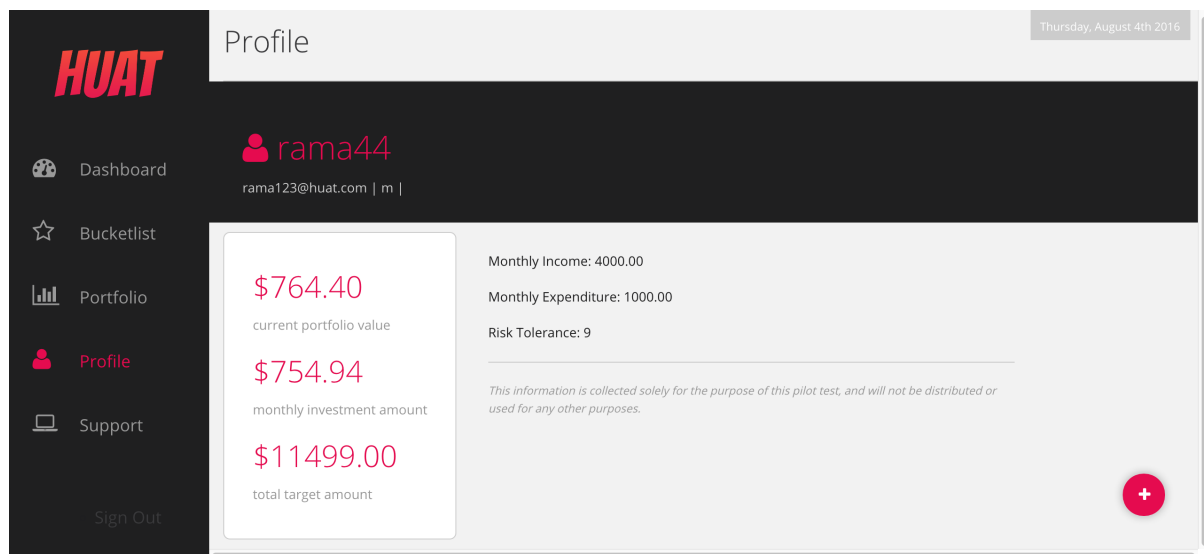
Portfolio



The portfolio page gives an in-depth understanding of the breakdown of the portfolio, and the rate of returns associated with your bucket. You can also see the allocation of risky & non-risky assets.

Profile

The profile page acts as a summary to the user's portfolio value as well as other personal details regarding the user's profile.



Bug Reporting

The procedure for reporting errors and difficulties faced during the pilot test.

A lot of the bugs on the platform are quantum problems that can be quickly solved by refreshing. If the problem persists, please do the following:

The screenshot shows the HUAT Help and Support page. On the left is a dark sidebar with the HUAT logo and navigation links: Dashboard, Bucketlist, Portfolio, Profile, Support (highlighted), and Sign Out. The main content area is titled 'Help and Support' and includes a date stamp 'Thursday, August 4th 2016'. It contains a message about reporting bugs, a link to 'Download the Tutorial here', and an email address 'zikanghan@gmail.com'. On the right is the 'Error Report Form' with fields for 'Title' and 'Description', a 'Submit' button, and a red circular button with a plus sign.

1. Go to the Support section on the left.
2. Fill in the Error Reporting Form with the title and description of the bug you faced.
3. We request that you be very detailed in your explanation of the bug, with the URL and impact in your description. This will enable us to efficiently squash the bug.
4. If you have any other issues with the platform, please email zikang_han@mymail.sutd.edu.sg

Additional Details

Features that can aid you with the usage of the platform

Tooltips

Across the platform, there are many places where we have provided tooltips (little question marks) which will give you more information with regards to the platform.

Portfolio Data

The portfolio data used in the platform is based on historical prices, and is not reflective of the current market prices or movements.

Personal Data

All personal data, goals, and usage behavior is collected and analyzed solely for the purpose of this pilot test.

Thank You