Registering an Account on ARX

Below are the steps to be followed for **Individual User Account registration** on ARX.

Each individual wishing to submit items **must** 'Create an Account' at the ARX portal before that individual can contribute material to the ARX Platform. Following is an outline of the key steps important in ensuring the individual creates an account that will enable them to submit material as an individual:

(1) Visit the ARX Home Page (www.arx.cfa).

(2) Click on the 'Create an Account' link in the top right hand corner of the ARX Home Page.

(3) Complete all mandatory personal detail fields (e.g. first name, last name).

(4) Under 'Additional Details', ensure to choose the appropriate response to the question: "Are you a CFA Charterholder?" *

(5) Under 'Additional Details', ensure click 'No' to the question: "Are you representing a corporate contributor of CFA Institute?"

(6) Click the agreement acknowledgement understanding the 'Terms and Conditions' and 'Privacy Policy'.

(7) Click 'Continue' to proceed with creation of a new account, or click 'Cancel' if wish to cease the process.

(8) When received (via email), click on the account verification URL.

(9) After clicking the verification link, the user will be directed to an intermediary page and requested to enter password (as a final check to ensure authenticity of the user and that not a robot). The verification URL is only valid for 24 hours at which time the user must request another verification URL to be dispatched.

(10) User enters requested password (that which nominated in process of establishing account) at which point (if correct) the user will be re-directed to their personal 'My Account' page. If the password entered is incorrect, the user will be prompted to try again.

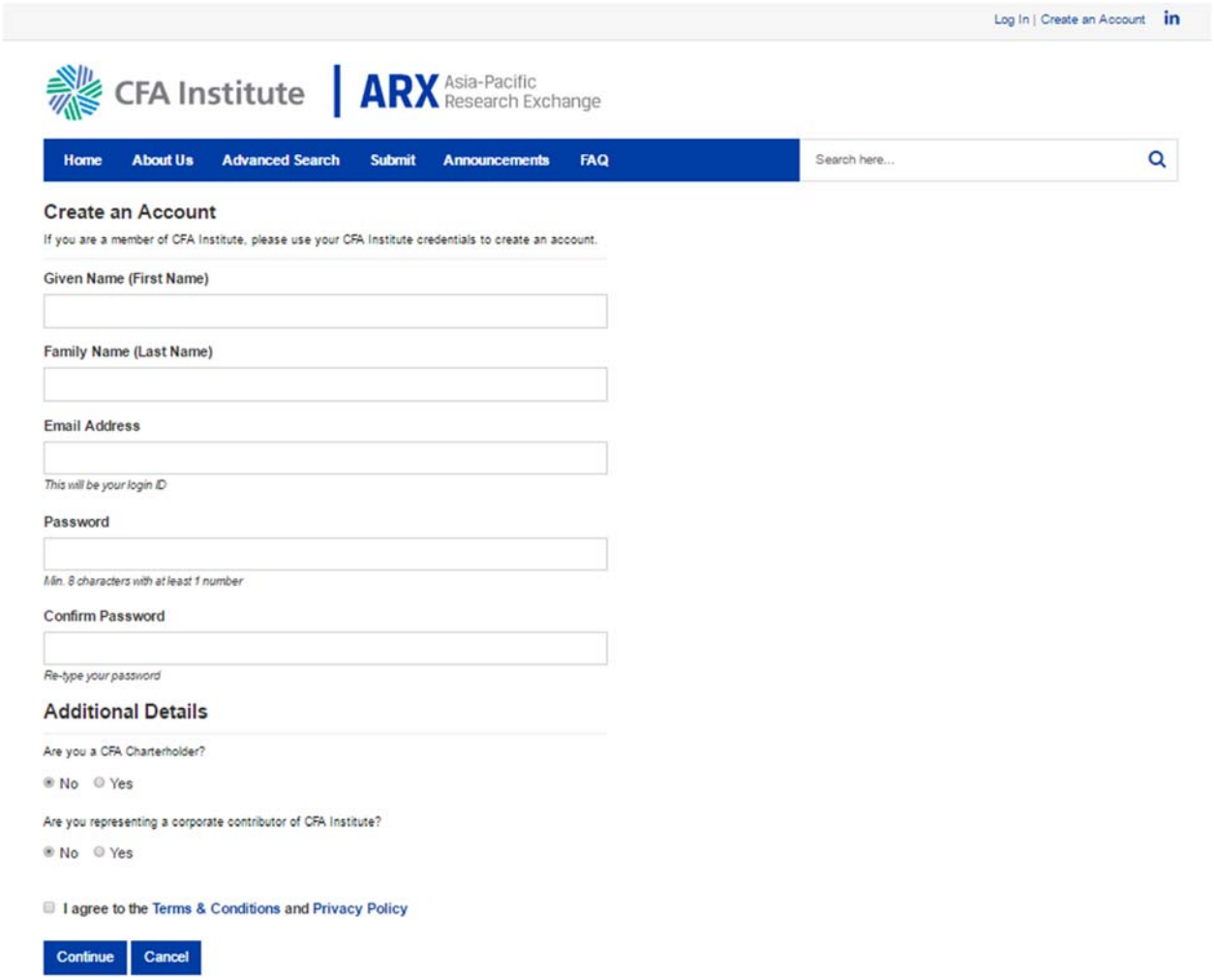
**It is recommended the user seeking CFA Charterholder designation affiliation use the name and email used when logging into their CFA Institute account*

See Figure 1.1 for an example of the screen an individual will see and details to be filled out

The following is a description of the actions of the ARX platform system upon the receipt from a newly registered accounting individual:

(1) ARX platform automatically dispatches an email to the New User informing them that to finalize the creation of their account, the new user will first need to click the verification link in the email dispatched.
(2) In the email dispatched as per Point (1), the New User will also be informed of their rights and status (i.e., will be permitted to submit items immediately upon clicking the verification URL).
(3) Once the New User has clicked the verification URL, and re-entered their password when prompted, the system will dispatch an email to the New User informing them that their account has been successfully registered.

Figure 1.1: Registration screen for an individual user



Submitting and Posting an Item

The process of getting an item approved and posted involves the process of submission, review and approval.

Submission of an Item

Having created an account, the registered user may proceed to submit items for review. The following process is to be completed:

(1) Registered user (whether individual, joint affiliated, CFA Charterholder, or Joint Affiliation with CFA Charterholder) logs-in to their account.

(2) User selects 'Submit' link from Main Toolbar, and is directed to intermediary 'Submit' page.

(3) Registered user selects desired submission path for the item to be submitted from those listed (and explained as presented earlier) on the intermediary 'Submit' page (see Figure 1.2). For NZFC conference purpose, the relevant option is "Original Research Item".

(4) Complete all mandatory fields (required) and all optional fields (recommended) on the relevant form. Remember to put NZFC in front of your "Item Title"; for example, if the title of your paper is "YXFT"; you should enter "NZFC – YXFT" on the "Item Title" field.

(5) Under Type of Item, select Prize Submission.

(6) After the registered user has completed the fields (and uploaded any attachment if required) the registered user may:

(a) Click the 'Save' toggle button[i] that will save all data entered into the form, thereby, allowing the affiliated-user to return later to complete the submission, edit data entered or continue to fill in the information immediately in spots where needed;
(b) Click the 'Submit for Review' toggle-button (if all mandatory requirements completed); or
(c) Click the 'Cancel' toggle button that will cancel all data entered.

(7) If the registered user clicks the 'Submit for Review' toggle-button, the registered user will be directed to an intermediate page informing that the:

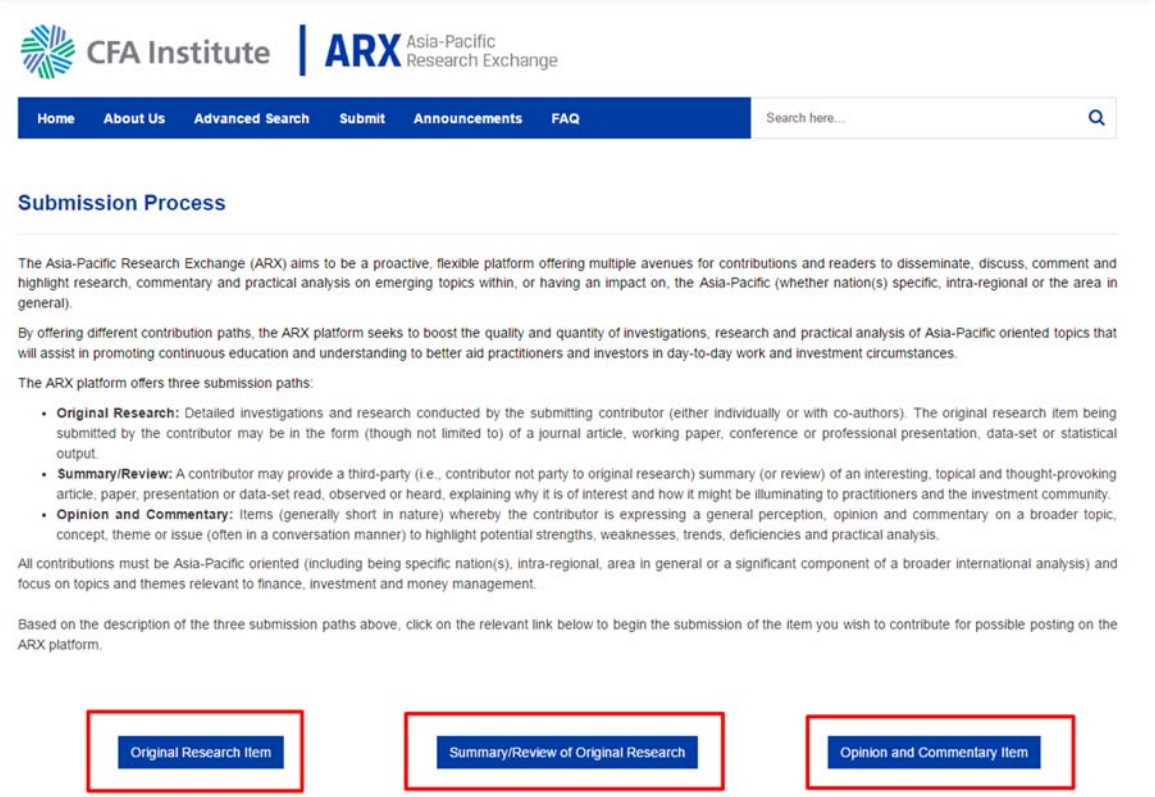
(a) Item planned for submission will be subject to a review;
(b) Between the times of submission till the beginning of the review, the person submitting the item may edit and change the submitted item;
(c) Once the review process begins the item can no longer be edited; and
(d) Requesting confirmation wish to proceed.

(8) If the registered user confirms the wish to proceed, the registered user will click the 'Click for Review Now' toggle-button **BUT** if wishes not to proceed then clicks the 'Cancel' toggle-button.

(9) Upon clicking the 'Click for Review Now' toggle-button, the registered user will be directed to a page informing that person:

(a) The item has been submitted;
(b) An email has been sent to the ARX Admin that the item has been submitted and is ready for review.
(c) If item deemed suitable it will be posted on the ARX platform.

Figure 1.2: Submit intermediary page



Post Review of the Submitted Item

Once a decision has been rendered following the review of the submitted item, the following actions are enacted as follows if the Super Administrator elected to accept the item as submitted the ARX platform initiates the following automated actions:

(1) An email will be dispatched to the end user informing the user that the item has been reviewed and has been accepted for posting to the ARX platform.

(2) A summary of the accepted item will be posted on the ARX Home Page under 'Recent Postings', be listed in full on an individual summary page, and be reflected as posted in the user's account page.

If the Super Administrator elected to **NOT** accept the item as submitted the ARX platform initiates the following automated actions:

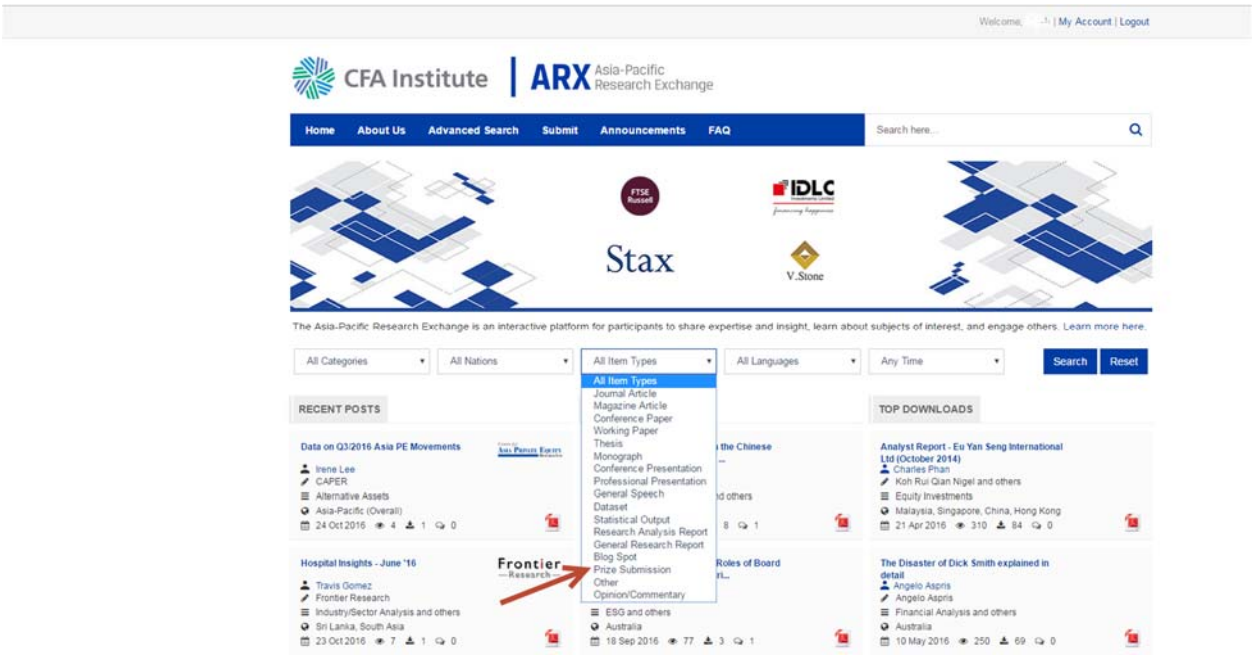
(1) An email will be dispatched to the end user informing the user that the item has been reviewed and has **not** been accepted for posting to the ARX platform (along with an explanation for the rejection).

Viewing of the Submitted Item

Once the Item is reviewed as above, a summary of the accepted item will be posted on the ARX Home Page under 'Recent Postings', be listed in full on an individual summary page, and be reflected as posted in the user's account page.

Users can use the home page search function to see all the articles under this category using below steps.

1. Click on All Item Types dropdown and select Prize Submission.
2. Click on Search to display all results.



[i] The 'Save' toggle button may be clicked at any time, and this will prompt the system to save all data entered into the form at that time, and allow the user to either (a) continue to enter data immediately, or (b) return later to complete (or cancel) the form for submission.