



Strategii
Institute



Radar

User Manual

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Foreword

Radar is Strategi Institute's online learning management system, built using Totara software and hosted by Catalyst.

Housing over 250 articles available to suit your CPD requirements, you can be confident that your company and employee information, content and outcomes are safe and secure with Radar having met the standard security protocols demanded by banks, insurance companies, universities and [NZ government's security requirements](#).

Radar also offers the following benefits:

1. **Your PDPs and CPD logs in one location:** Create your professional development plan (PDP) and track your progress via CPD logs in one location on Radar.
2. **Compliance reporting made easy:** Track the training progress of your staff, both individually and as a team, and schedule reports to send to you automatically.
3. **Upload your own content:** Host company training content which only your staff, or those you select, will be able to view.
4. **Your own brand and colours:** Have a customised learning platform that reflects your branding, making it look like you have your own learning platform.
5. **Help available at your fingertips:** Access to dedicated Strategi Institute staff to answer questions and support during business hours via live chat, phone and email.

Subscription options

To view our subscription options, download our [Radar information guide](#).

Group pricing is available on request.

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How to login to Radar

System: Radar (Strategi Institute's learning management system)

Audience: All users

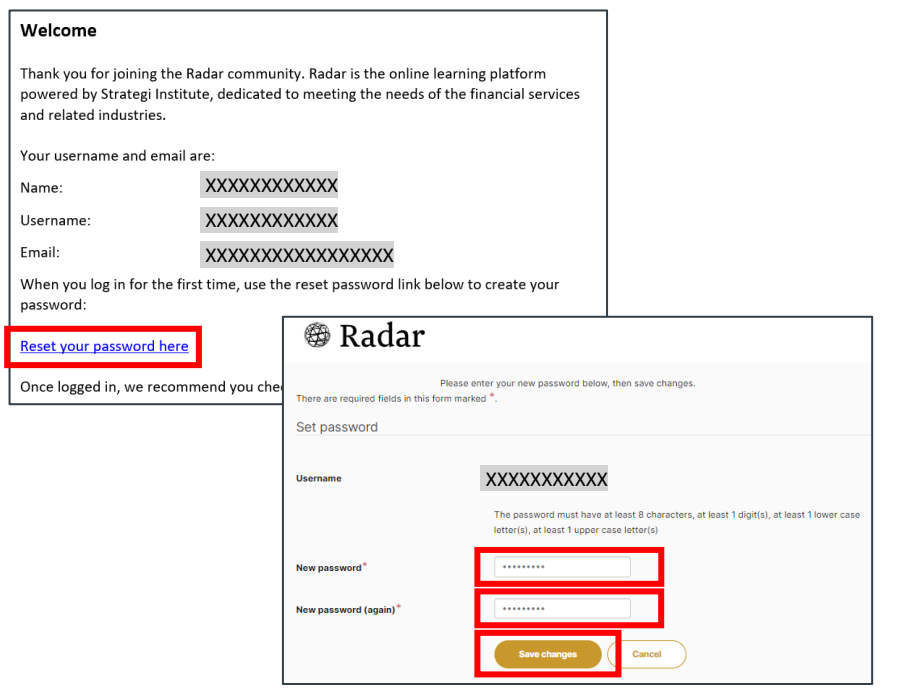
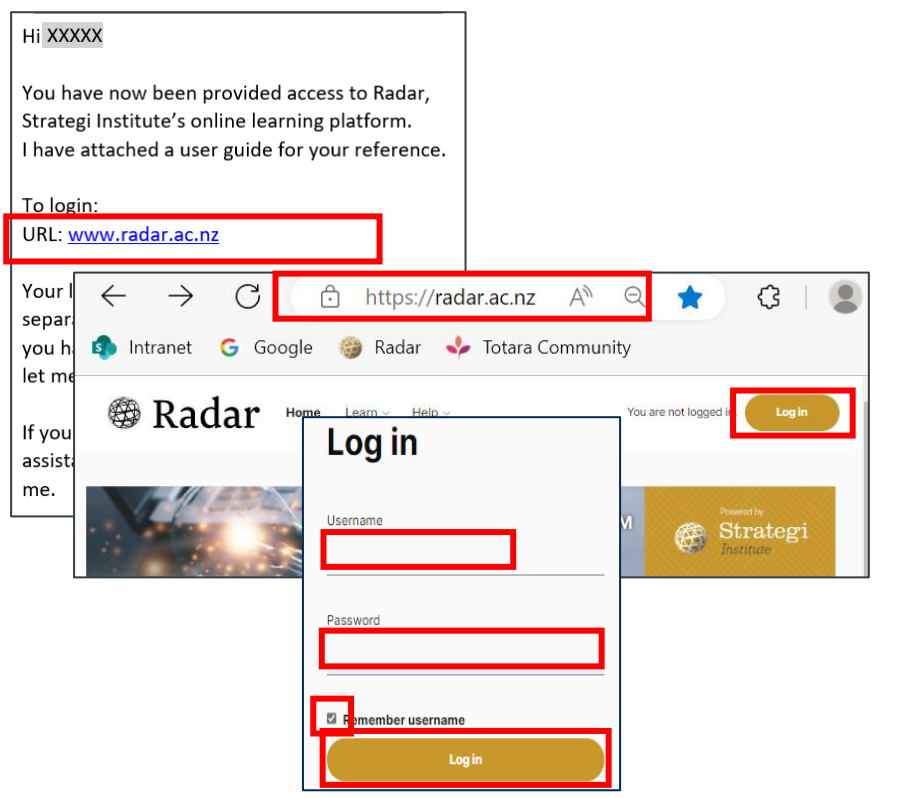
Date: 18 Jan 2024

Assumptions:

- Instructions assume reader has a subscription to Radar. Refer [Radar information guide](#) for additional information about subscription plans and pricing.

Process steps and screenshots

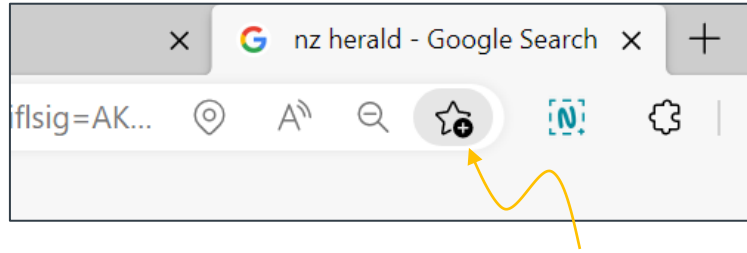
First time user

<p>1.</p>	<p>Receive system email</p> <ol style="list-style-type: none">1. Receive welcome email. Take note of your username and email log in details.2. Click the reset your password here hyperlink.3. Enter your new password. Take note of the system rules for password requirements.4. Enter your new password again.5. Select save changes. You will be taken to the secure Radar landing page (https://radar.ac.nz/).	 <p>The screenshot shows a 'Welcome' email and a 'Set password' form. The email text includes: 'Thank you for joining the Radar community. Radar is the online learning platform powered by Strategi Institute, dedicated to meeting the needs of the financial services and related industries. Your username and email are: Name: XXXXXXXXXXXX, Username: XXXXXXXXXXXX, Email: XXXXXXXXXXXXXXXXXXXX. When you log in for the first time, use the reset password link below to create your password: Reset your password here. Once logged in, we recommend you che...'. The 'Set password' form has fields for 'Username' (XXXXXXXXXX), 'New password*' (masked with dots), and 'New password (again)*' (masked with dots). A 'Save changes' button is highlighted with a red box.</p>
<p>2.</p>	<p>Receive strategi email</p> <ol style="list-style-type: none">1. Receive user instructions email.2. Click on hyperlink to go to the unsecure <i>Radar Home Page</i> (https://radar.ac.nz/).3. Select Log in.4. Enter Username and Password. NOTE:<ul style="list-style-type: none">○ Fields are case sensitive.○ Tick the Remember username checkbox for easier logging on next time.5. Select Log In. You will be taken to the secure <i>Radar Landing Page</i>.	 <p>The screenshot shows a user instructions email and a login page. The email text includes: 'Hi XXXXX. You have now been provided access to Radar, Strategi Institute's online learning platform. I have attached a user guide for your reference. To login: URL: www.radar.ac.nz'. The login page shows a browser address bar with 'https://radar.ac.nz', a 'Log in' button highlighted with a red box, and a 'Log in' form with fields for 'Username' and 'Password', and a checked 'Remember username' checkbox. The 'Log in' button in the form is also highlighted with a red box.</p>

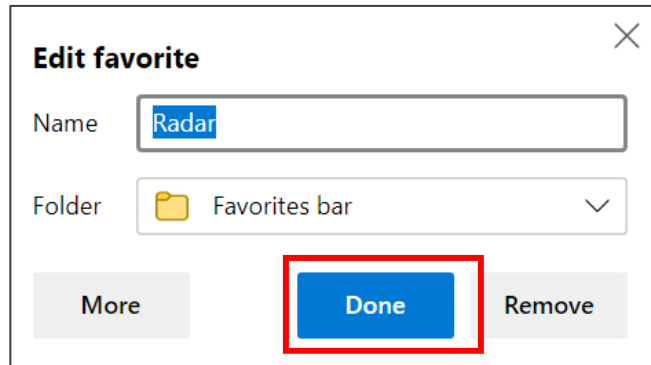
Bookmark Radar webpage

Bookmarking the website will make it easier to access Radar from your desktop.

1. **Commence bookmark**
 1. Go to <https://radar.ac.nz/>.
 2. Select Ctrl + D from your keyboard or the Star icon from your browser.
You will be taken to the *Edit favorite* window.

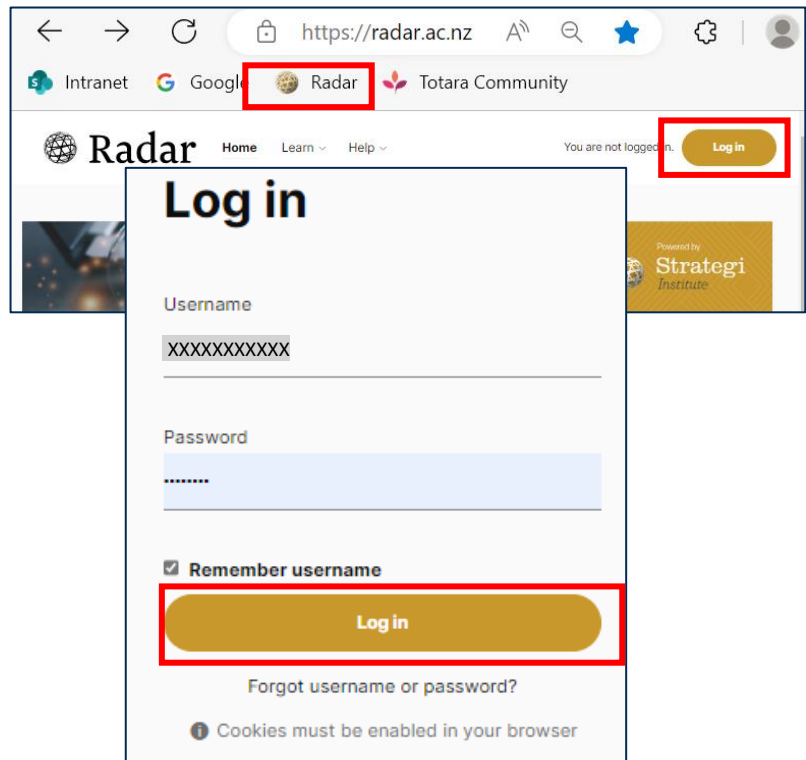


2. **Add a Bookmark**
 1. Enter **Radar** in the Name field.
 2. Select your preferred bookmark location using the dropdown arrow.
 3. Select **Done**.



Repeat user

1. **Login to Radar**
 1. Click on your **Radar** bookmark
You will be taken to the secure *Radar Landing Page*.
 2. Select **Log in**.
 3. Enter **Username** and **Password**.
NOTE:
 - These fields are case sensitive.
 - Tick the **Remember username** checkbox for easier logging on next time.
 4. Select **Log in**.
You will be taken to the secure *Radar Landing Page*.



Forgot password process

1. Commence log in

1. Click on your **Radar** Bookmark
You will be taken to the secure *Radar Landing Page*.
2. Select **Log in**.
3. Select **Forgot username or password**.
You will be taken to the *Account Search* window.

2. Start forgot password process

1. Enter your Username or Email address from your system email.
2. Select **Search**.
You will receive a system message.
3. Select **Continue**.
If you entered correct details an email will be sent with password reset instructions.
4. Click on the reset hyperlink from the email.
You will be taken to the Radar *Reset password* window.

3. **End forgot password process**

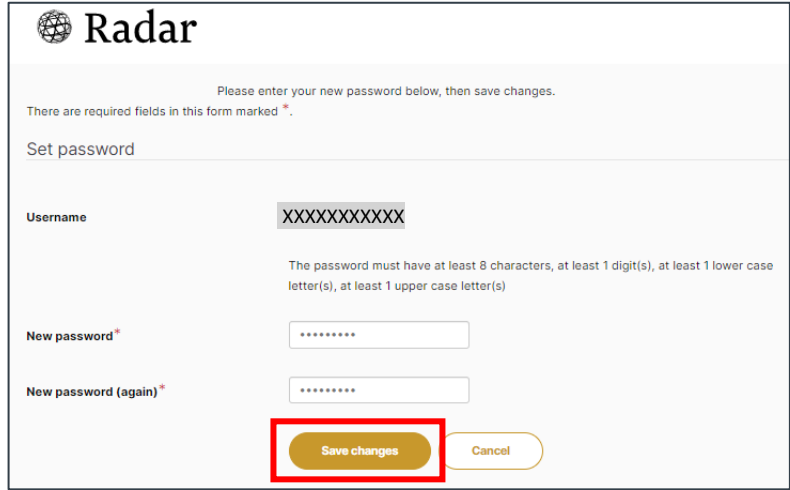
1. Enter your New password.

Take note of the system rules for password requirements.

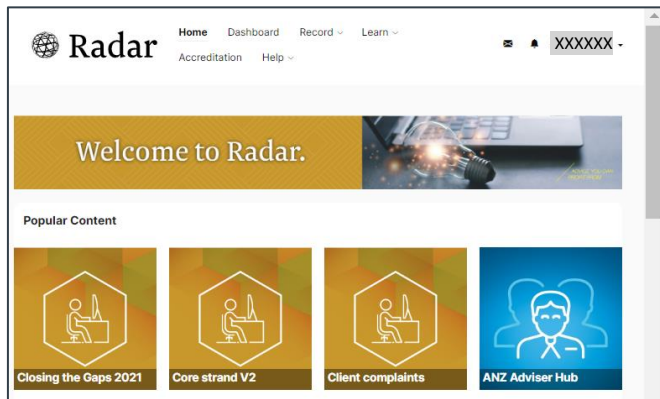
2. Enter your New password again.

3. Select **Save changes**.

You will be taken to the secure Radar Landing Page (<https://radar.ac.nz/>).



The screenshot shows the Radar password reset interface. At the top left is the Radar logo. Below it, a message reads: "Please enter your new password below, then save changes. There are required fields in this form marked *." The form is titled "Set password" and includes a "Username" field with the text "XXXXXXXXXX". Below this is a password strength indicator: "The password must have at least 8 characters, at least 1 digit(s), at least 1 lower case letter(s), at least 1 upper case letter(s)". There are two "New password" fields, both containing "*****". At the bottom, there are two buttons: "Save changes" (highlighted with a red box) and "Cancel".



Additional information:

- Detailed instructions for managing the **Record** and **Learn** pages is covered in detail further in the manual. This section provides an overview only.

Process steps and screenshots

1. Radar home page

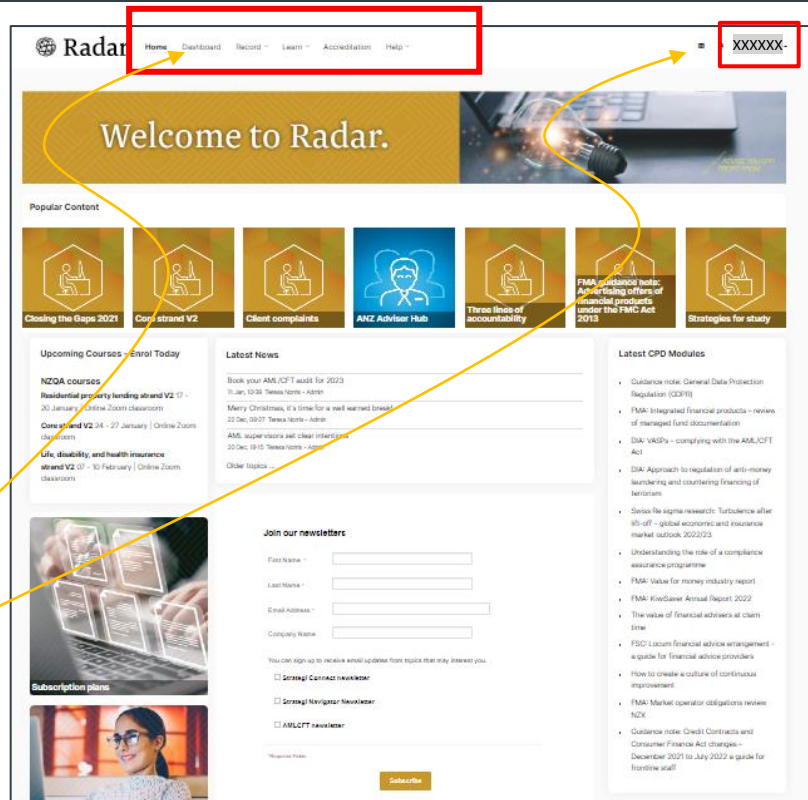
The home page provides a portal for directly accessing content, news, and important information (Contact details and newsletter subscriptions).

NOTE: Colours and logos may vary based on customisation by your company).

From the home page you can also:

- Navigate to Radar sub-pages (see below).
- Access and edit profile and preference information

We suggest liaising with your training manager before editing any settings.



2. Radar sub-pages:

Page	Details
Dashboard	Portal displaying <i>news</i> and <i>event</i> alerts as well as information specifically tailored to you e.g., courses you’ve been enrolled in, your CPD Hours, and progress against your subscription period, as well as an export function for both your PDP or CPD log (we have provided an example on the following page).
Record	Record allows you to access to the following to sub-pages: <ol style="list-style-type: none"> My PDP: Create, view, and manage your professional development plans (PDP). My CPD Log: View your CPD Log and add evidence items (i.e., external CPD course).
Learn	Portal that provides visibility to all Learning material. NOTE: Access is determined by your subscription.
Accreditation	Stores product provider assessments, communications, and resources for advisers accredited with them. NOTE: Access to this material is only granted by the product provider.
Help	Help provides direct access to this user manual, general information about Radar, and a contact us page for your convenience.

How to create a professional development plan

System: Radar (Strategi Institute's learning management system)

Audience: All users

Date: 18 Jan 2024

It is highly recommended that PDPs are captured in Radar to assist with visibility and tracking. Tracking is possible by *linking Radar training modules to PDP objectives*, creating a singular view of completion rates, dates, and gaps.

Assumptions:

- Instructions assume reader is already registered in Radar.

Process steps and screenshots

Create and activate a plan

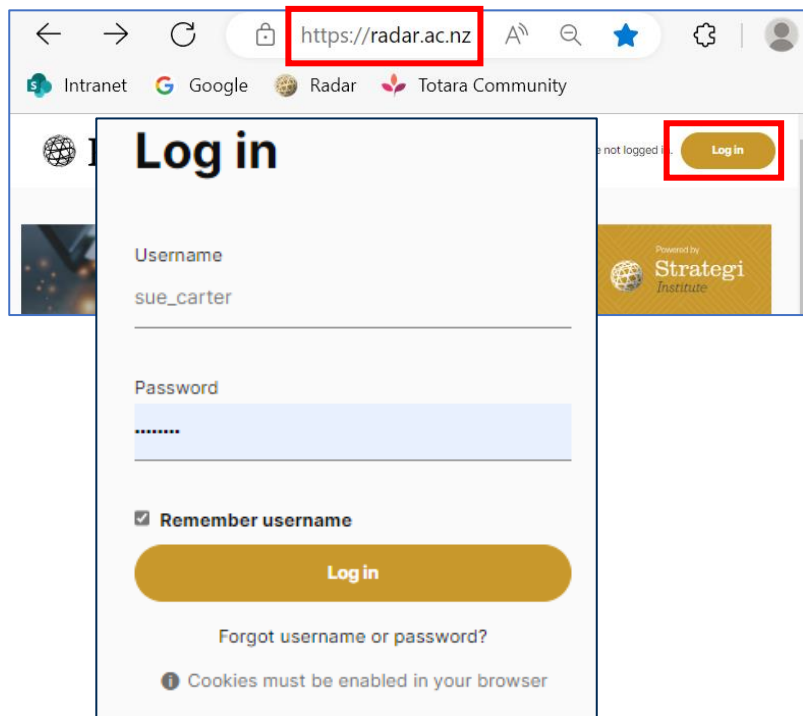
1. Login to Radar

1. Go to <https://radar.ac.nz>.
2. Select **Log in**.
3. Enter **Username** and **Password**.

NOTES:

- These fields are case sensitive.
 - Tick the **Remember username** checkbox for easier logging on next time.
4. Select **Log in**.

You will be taken to your secure *Radar landing page*.



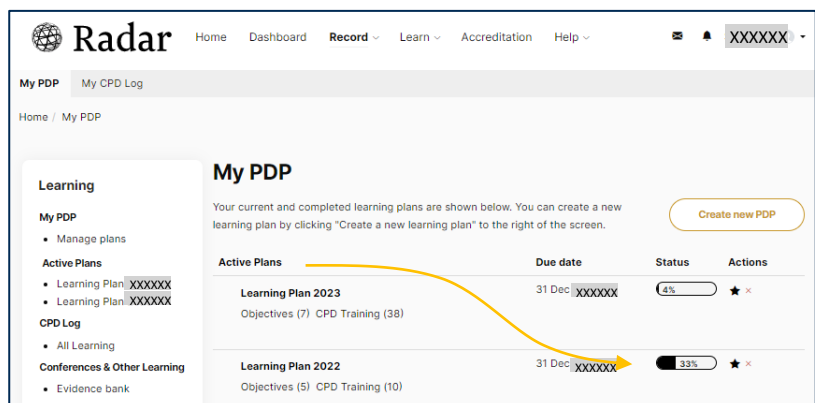
2. Access PDP main page

1. Select **Record** (via Navigation Menu).
2. Select **My PDP** (via Navigation Sub-Menu).

You will be taken to the *PDP main page*.

From this page you will be able to:

- Create, delete a plan (or mark plan as complete).
- View your plan history and snapshots of progress.
- Access existing plans to edit if required.



3.

Create PDP

1. Select **Create new PDP**.
2. Complete Form fields.
NOTE: Fields marked with an asterisk (*) are mandatory.

3. Select **Create plan** to complete the task.
You will be taken to your PDP, defaulting to the **Overview** tab.

NOTE: You can think of the plan as a 'folder' which allows you to store your objectives and training information.

Align the **Start** and **Complete** dates with your annual review cycle.

NOTE: Radar will present warning messages if these sit outside possible parameters.

Create new PDP

To create a new plan please add the plan title, a short description of the plan and a date by which the plan should be completed. You can click "Create plan" once you have entered this information.

There are required fields in this form marked *.

▼ Plan details

Plan template: Learning Plan XXXXXX

Plan name*: Learning Plan XXXXXX

Plan description: [Rich text editor]

Start date: 7 January XXXXX

Completion date*: 31 December XXXXX

Create plan Cancel

Description is not a mandatory field. We recommend using it to state your current role description, any anticipated business or legislative changes that require you to upskill, and identified competence, knowledge, and skill gaps.

4.

Activate plan

Two system messages will be presented:

1. Select **Activate plan**.

This will now allow you to add **objectives** and **CPD training** to your plan.

NOTE: From the **overview** tab you can also:

- Edit, delete, or complete the plan.
- Add comments as required.

Plan creation successful

Your plan has not been activated **Activate Plan**

Plan: Learning Plan XXXXXX

Overview Objectives CPD Training

Completion date: 31 December XXXXX

Edit details **Delete plan** **Complete plan**

Add a comment... **Save comment**

You will also be sent an email confirming plan creation.

Remember to use **Save comments** when adding.

Create objectives

1. Access objectives tab

1. Navigate to the **Objectives** tab within your plan.

Plan: Learning Plan XXXXXXXX

Overview Objectives CPD Training

All the objectives that form your learning plan are shown below. You can view any objective by clicking the objective title. Clicking "Add new objective" will allow you to request to add new objectives to this learning plan.

Add new objective

2. Add objectives

1. Select **Add new objective**.
2. Complete form fields.
NOTE: Fields marked with an asterisk (*) are mandatory.
3. Select **Add objective** to complete the task.

Overview Objectives CPD Training

Add new objective

There are required fields in this form marked *.

Objective Title* PERSONAL DEVELOPMENT

Objective description

Description is not a mandatory field. You can use this field to capture the aim and outcomes of your objective.

Due date 7 March 2023

Status* In Progress

Add objective Cancel

Spread the objective due dates throughout the year, so that training is evenly spread across months.

4. Repeat steps 1-3 to add all *objectives* to the plan before attaching relevant Radar training modules.

Plan: Learning Plan XXXXXXXX

Overview Objectives CPD Training

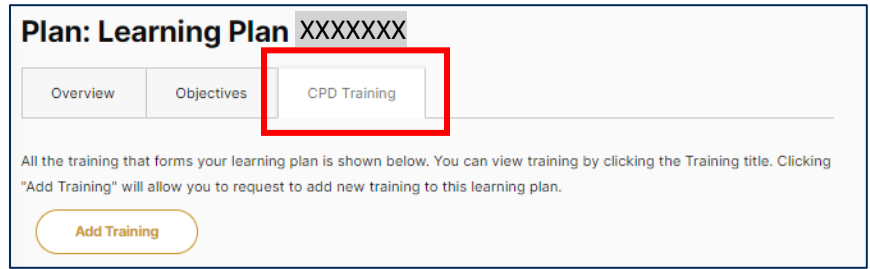
All the objectives that form your learning plan are shown below. You can view any objective by clicking the objective title. Clicking "Add new objective" will allow you to request to add new objectives to this learning plan.

Add new objective

Objective Name	Status	Training	Evidence	Due date ▲	Comments	Actions
AML/CFE	In Progress	0	0	XXXXXXX	0	×
ETHICS, COMPLIANCE AND BEST PRACTICE	In Progress	0	0	XXXXXXX	0	×
ADVICE PROCESS	In Progress	0	0	XXXXXXX	0	×
PRODUCT KNOWLEDGE	In Progress	0	0	XXXXXXX	0	×
PERSONAL DEVELOPMENT	In Progress	0	0	XXXXXXX	0	×
BUSINESS DEVELOPMENT	In Progress	0	0	XXXXXXX	0	×
UNDERSTANDING CLIENTS	In Progress	0	0	XXXXXXX	0	×

Attach Radar training modules to plan

1. **Access CPD training tab**
 1. Navigate to the **CPD training** tab within your plan.

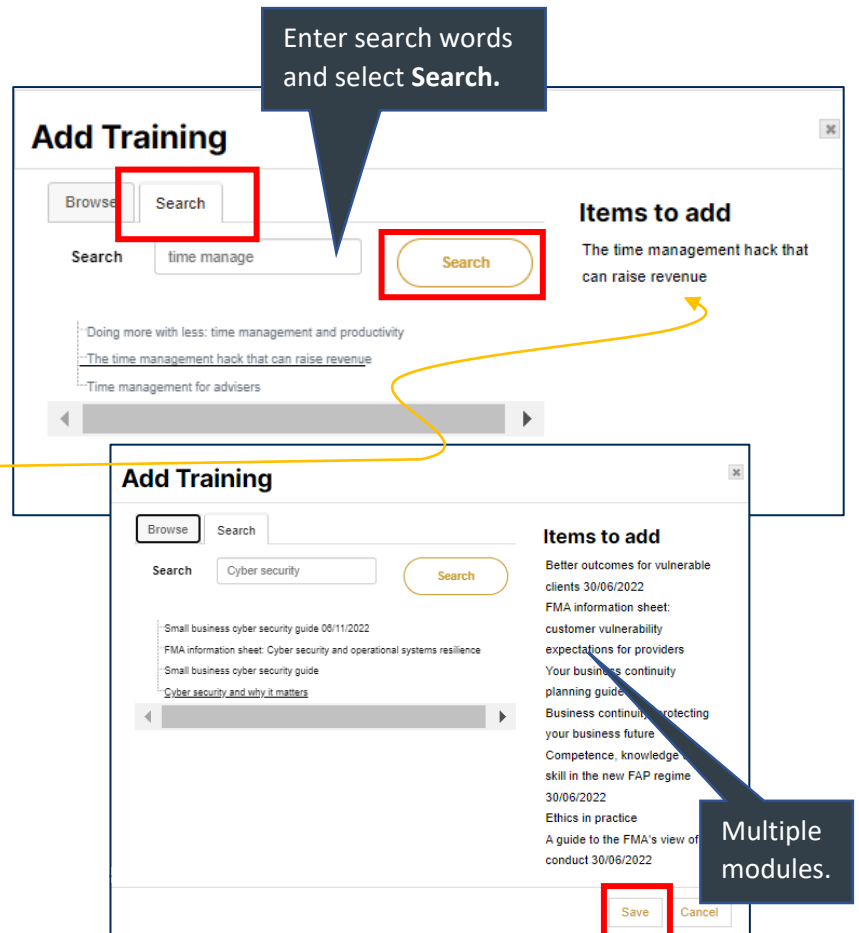


2. **Attach training module**
 1. Select **Add training**.
 2. Source the desired training module via the:
 - **Browse** tab, or
 - **Search** tab (as shown).
 3. Click the relevant module title.

NOTE: Available modules will be underlined when hovering.

Once selected, the module will appear in the **Items to add** column on the right.
 4. Repeat step 2 and 3 until all required training modules appear in the **Items to add** column.
 5. Select **Save**.

You will be returned to the **CPD training** tab which will allow you to now *link* these modules to your Objectives.



CPD training tab showing *attached* modules in plan.

The screenshot shows the 'Plan: Learning Plan' interface with the 'CPD Training' tab selected. Below the tabs, there is a text block explaining that training is shown below and can be viewed by clicking the title. An 'Add Training' button is visible at the bottom. Below this, there is a table of training modules.

Training	CPD hours	Progress	Evidence	Priority	Due date	Comments	Actions
Your business continuity planning guide	0.25	0%	0	None	dd/mm/yyyy	0	Launch Training
Working remotely: The full guide for New Zealand businesses and employees	0.25	0%	0	None	dd/mm/yyyy	0	Launch Training
Tips for the correct use of the KiwiSaver word and logo	0.25	0%	0	None	dd/mm/yyyy	0	Launch Training

Multiple modules.

Link Radar training modules to objectives

*** The *linking* task is critical and will allow you to correctly track your objectives and plan completion rates ***

1. Open objective

- Navigate back to **Objectives** tab within your plan.
- Click the required objective title.
You will be taken to the *objective's* sub-window.

Plan: Learning Plan XXXXXXXX

Overview **Objectives** CPD Training

All the objectives that form your learning plan are shown below. You can view any objective by clicking the objective title. Clicking "Add new objective" will allow you to request to add new objectives to this learning plan.

[Add new objective](#)

Objective Name	Status	Training	Evidence	Due date	Comments	Actions
ADVICE PROCESS	In Progress	4	0	XXXXXXX	0	×
AML/CFT	In Progress	4	0	XXXXXXX	0	×
BUSINESS DEVELOPMENT	In Progress	5	0	XXXXXXX	0	×
ETHICS, COMPLIANCE AND BEST PRACTICE	In Progress	11	0	XXXXXXX	0	×

2. Link training modules

- Select **Add linked courses from plan**.
You will be taken to the *Add linked courses from plan* sub-window.
- Click the relevant module title you want to *link* to the objective.
Once selected, the module will appear in the **Items to add** column on the right.
- Repeat step 2 and 3 until all required training modules for that objective appear in the **Items to add** column.
- Select **Save**.
You will be returned to the objective's sub-window.
See next page for example.

Plan: Learning Plan XXXXXXXX

Overview Objectives CPD Training

« All objectives

ADVICE PROCESS

[Edit details](#)

Due date: 01 April XXXX Status: In Progress

Linked CPD Training

No linked cpd training.

[Remove selected links](#)

[Add linked courses from plan](#)

Linked Evidence

No linked evidence.

[Remove selected links](#)

[Add linked evidence](#)

Add linked courses from plan

Browse

- 10 Ways My Closing Ratio Topped 90%: How our sales process went from dismal to dynamic
- A 7 step plan to transform your practice
- A guide to the FMA's view of conduct 30/08/2022
- AML/CFT Act 2008: annual refresher for advisers
- Becoming a culturally intelligent financial planner
- Better outcomes for vulnerable clients 30/06/2022
- Business continuity: protecting your business future
- Client complaints
- Climate change and prudential regulation: Issues in New Zealand
- Code of Professional Conduct for Financial Advice Services
- Competence, knowledge and skill in the new FAP regime 30/08/2022
- Compliance Officer Course (Level 5) Micro-credential
- Cyber security and why it matters
- Digital transformation in financial services
- Discussing fees with clients
- Doing more with less: time management and productivity
- Embracing AML/CFT digitisation
- Empathy is the essential skill to survive the robo-threat
- Ethics in practice
- Evaluating the suitability of investment products, structures, and options in terms of their benefits, risks, and limitations
- FMA: Climate related disclosures regime - implementation approach
- FMA information sheet: customer vulnerability expectations for providers
- FMA information sheet: developing cyber resilience for financial advice providers
- From frustration to flourishing: applying positive psychology to financial

Items to add

- Code of Professional Conduct for Financial Advice Services
- Evaluating the suitability of investment products, structures, and options in terms of their benefits, risks, and limitations
- Guidance note: the advice process during COVID-19

[Save](#) [Cancel](#)

Use linked evidence buttons when add/removing external training/seminars.

Multiple modules.

NOTE: Evidence (i.e., external training courses/seminars) can be linked the same way by selecting **Add linked evidence**. However, you must have created the evidence and had this approved before completing linking.
Refer [How to manage your CPD | Add External Events.](#)

Objective (ADVICE PROCESS in this example) showing *linked* modules.

Plan: Learning Plan XXXXXXXX

Overview Objectives CPD Training

« All objectives

ADVICE PROCESS

Edit details

Due date: 01 April XXXX Status: In Progress

Linked CPD Training

Training	Priority	Due date	Progress	Select Linked Find Learning
Code of Professional Conduct for Financial Advice Services			0%	<input type="checkbox"/>
Evaluating the suitability of investment products, structures, and options in terms of their benefits, risks, and limitations			0%	<input type="checkbox"/>
FMA: Climate related disclosures regime - implementation approach			0%	<input type="checkbox"/>
Guidance note: the advice process during COVID-19			0%	<input type="checkbox"/>

Remove selected links

Add linked courses from plan

3. **Complete linking**
- Repeat steps 1-4 from 'Link training modules' sub-task until all objectives have been updated.

Once completed you should be able to see the linked modules against each objective via the **Objectives** tab.

Plan: Learning Plan XXXXXXXX

Overview Objectives CPD Training

All the objectives that form your learning plan are shown below. You can view any objective by clicking the objective title. Clicking "Add new objective" will allow you to request to add new objectives to this learning plan.

Add new objective

Objective Name	Status	Training	Evidence	Due date	Comments	Actions
AML/CFT	In Progress	4	0	XXXXXXX	0	x
ETHICS, COMPLIANCE AND BEST PRACTICE	In Progress	11	0	XXXXXXX	0	x
ADVICE PROCESS	In Progress	4	0	XXXXXXX	0	x
	In Progress	1	0	XXXXXXX	0	x
	In Progress	4	0	XXXXXXX	0	x
	In Progress	5	0	XXXXXXX	0	x
	In Progress	3	0	XXXXXXX	0	x

The number of training modules linked to each objective.

How to manage your professional development plan

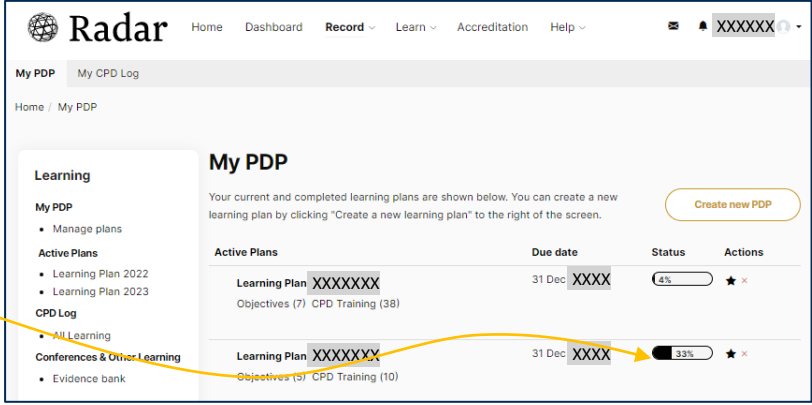
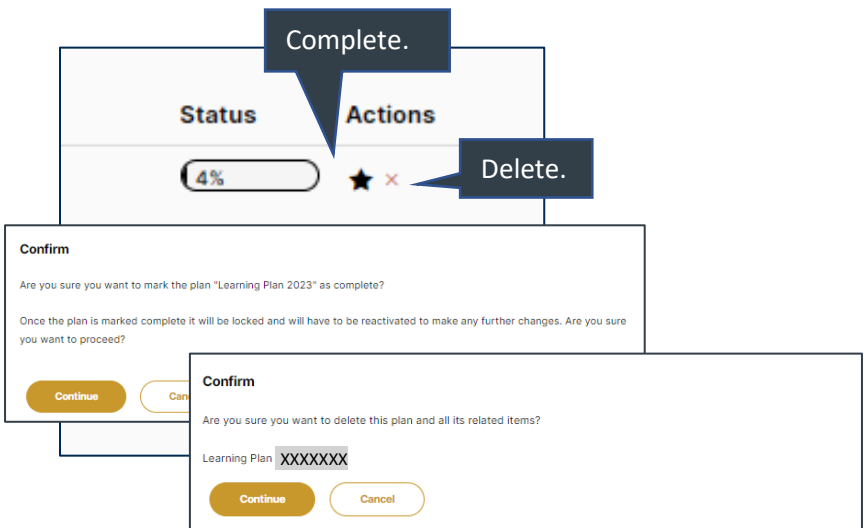
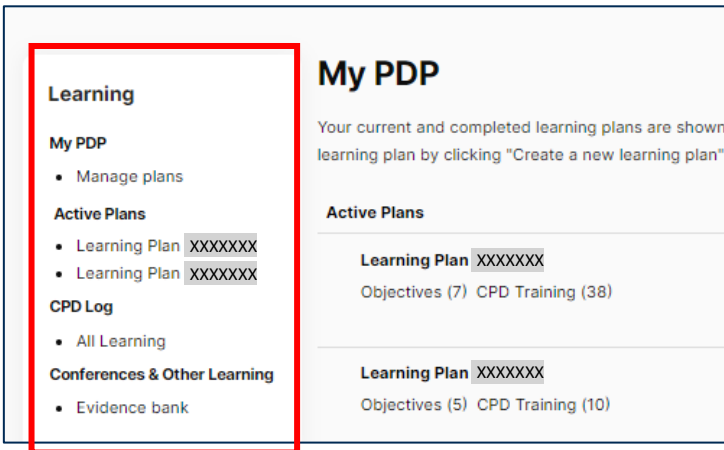
System: Radar (Strategi Institute's learning management system)

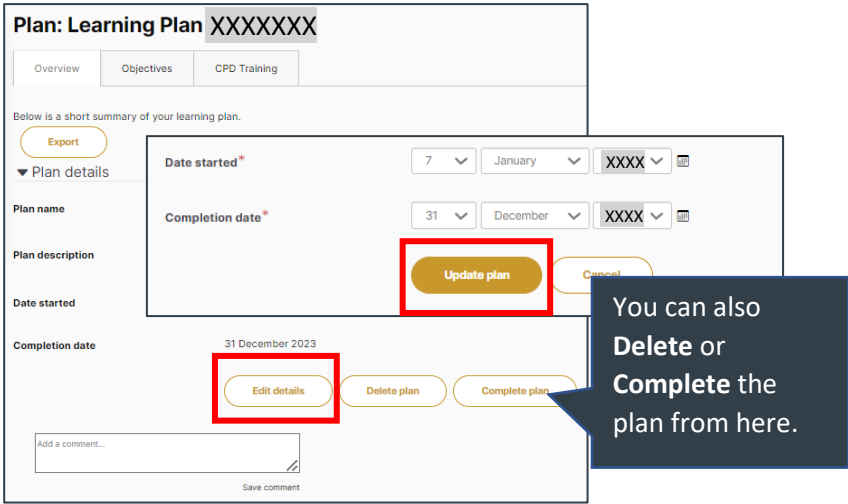
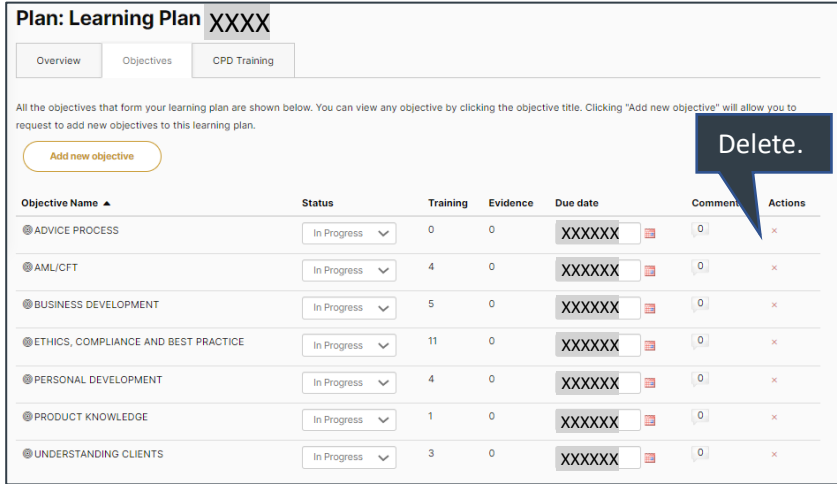
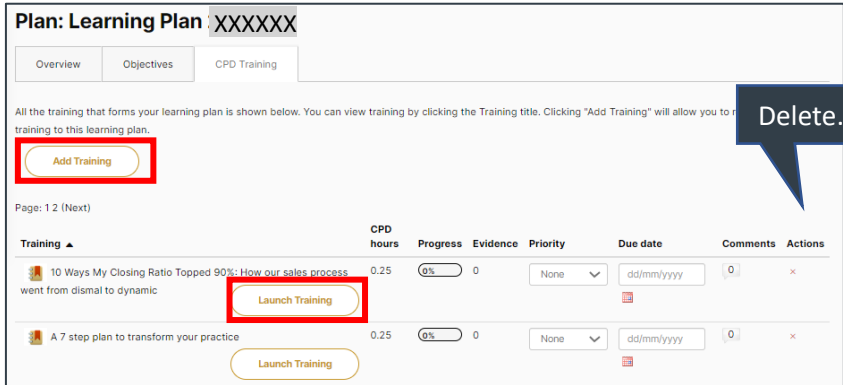
Audience: All users

Date: 18 Jan 2024

Once your PDP has been created, viewing and maintaining content can be undertaken via the PDP landing page or within the plans themselves. NOTE: Completed plans cannot be edited unless they are re-activated.

Process steps and screenshots

<p>1. PDP landing page</p> <p>1. Go to Record My PDP (via navigation menu).</p> <p>From this page you will be able to:</p> <ul style="list-style-type: none"> ○ Create, delete a plan (or mark plan as complete). ○ View your plan history and snapshots of progress. ○ Access existing active plans to edit if required. 	
<p>2. Delete or complete PDP</p> <p>1. Select the star or X icons under Actions to either complete or delete your PDP.</p> <p>2. Select either Confirm or Cancel on the system message to confirm or cancel your action.</p>	
<p>3. Access plans</p> <p>1. Access plan details to view or edit via the:</p> <ul style="list-style-type: none"> • Learning panel. • Selecting the plan (or objectives and CPD training) from the Active plans list. <p>NOTE: You can also go directly to CPD Logs from the Learning panel.</p>	

<p>4. Edit plan</p> <ol style="list-style-type: none"> Go to Overview tab. Select Edit details. Update required fields. Select Update plan. <p>NOTE: Completed plans cannot be edited unless they are re-activated.</p>	
<p>Edit objectives</p> <ol style="list-style-type: none"> Go to Objectives tab. <p>From this tab you will be able to:</p> <ul style="list-style-type: none"> Add an objective. Update objective Status. Update Due date. Delete objective. <p>NOTE: The status should be updated as you progress through CPD Training attached to the objective.</p>	
<p>Edit CPD training</p> <ol style="list-style-type: none"> Go to CPD training tab. <p>From this tab you will be able to:</p> <ul style="list-style-type: none"> Add training (Refer Attach Radar training modules to plan for details). Launch training modules. Update Priority. Update Due date. Delete training. <p>NOTE: This just removes the training module from your plan – it does not delete the module itself.</p>	

How to manage your CPD log

System: Radar (Strategi Institute's learning management system)

Audience: All users

Date: 18 Jan 2024

Once your PDP has been created, your CPD log allows you to formally track any completed training and CPD hours. Filtered lists can be generated and reports exported to .pdf as desired.

External training, seminars are also attached via this page.

Process steps and screenshots

View completed CPD training

- CDP log landing page**
 - Go to **Record | My CPD Log** (via navigation menu).
From this page you will be able to:
 - View all completed training and CPD hours.
 - Create filtered lists of completed training.
 - Export CPD log reports.
 - Add evidence items (i.e., external CPD).

Type	Name	Provider	CPD Hours	Time completed
□	7 steps to facilitate exquisite listening	Strategi	0.25	XXXXXX
□	The time management hack that can raise revenue	Strategi Institute	0.25	XXXXXX
□	Time management for advisers	Strategi Institute	1.00	XXXXXX
□	FMA guidance note: Advertising offers of financial products under the FMC Act 2013	Strategi Institute	1.00	XXXXXX
□	Women in insurance: Invest in women. Invest in business	Strategi Institute	0.50	XXXXXX

- Filter CPD training lists**
 - Update required **Type** and/or **Time completed** fields.
 - Select **Search**.
This will return the desired subset.
NOTE: You can choose to **Save this search** if it is one you will be viewing frequently (e.g. completed training for the current year).
 - Select **Clear** to conduct a new filter.

Type: is equal to Course Completion

Time completed: is after 16 January XXXXXX

is before 16 January XXXXXX

is between start of today and [] days before today (date of report generation)

is between start of today and [] days after today (date of report generation)

Show more...

Search Clear Save this search

View competencies and objectives

1. Access tabs

1. Go to **Competencies** or **Objectives** tabs.
2. Update **Name** fields.
3. Select **Search**.

NOTES:

- These are view only pages and details cannot be updated.
- Lists can be exported to a range of outputs as desired.

CPD Log : All Competencies

CPD Log Competencies Objectives

2 records shown

▼ Search by

Competency name ● contains

Show more...

Show/Hide Columns

Competency ▲

Personal development

Personal Development

CPD Log : All Objectives

CPD Log Competencies Objectives

13 records shown

▼ Search by

Objective full name ● contains

Show more...

Search Clear

Show/Hide Columns

Export as CSV Export

CSV
Excel
ODS
PDF landscape
PDF portrait

Plan	Plan status	Objective Name ▲	Due date	Status
Learning Plan 2023	Approved	ADVICE PROCESS	XXXXXX	In Progress
Learning Plan 2023	Approved	AMUCFT	XXXXXX	In Progress
		ment	XXXXXX	In Progress
		LOPMENT	XXXXXX	In Progress

Show or Hide columns as desired.

Add external events

1. Commence add evidence item

1. Go to **Record | My CPD Log** (via navigation menu).
2. Select **Add evidence item**.
You will be taken to the *Add an evidence item* sub-window.
3. Select **evidence type External CPD**.
You will be taken to the *External CPD* confirmation message.
4. Select **Use this type**.
You will be taken to the *new external CPD evidence item* sub-window.

CPD Log for XXXXXXXXXXXX

CPD Log Competencies Objectives

▼ Search by

Type ● is equal to Evidence

Time completed ●

is after 16 January XXXXXX

is before 16 January XXXXXX

is between start of today and days before today (date of report generation)

is between start of today and days after today (date of report generation)

Show more...

Search Clear

Save this search

Add evidence item

« Back to evidence bank

Add an evidence item

Evidence type Select or search for a type

External CPD

External CPD

External CPD

Use this type Cancel

2. Complete add evidence item

1. Complete form fields.

NOTE: Fields marked with an asterisk (*) are mandatory.

Complete as much information as possible to allow the approving manager to sign off the request.

2. Tick **Enable** checkbox and enter the date you completed the training.

This tags the evidence item with the correct year to allocate CPD hours.

3. Select **Save evidence item**.

This will appear on the nominated approver's dashboard to approve or decline.

NOTE: Once the evidence is approved, link your **External evidence item** to your objective. Refer [Link Radar training modules to objectives](#).

The screenshot shows a form titled "New External CPD evidence item" with the following fields and callouts:

- Evidence name**: A text input field.
- CPD hours***: A text input field with an asterisk indicating it is mandatory.
- Approval Status**: A dropdown menu currently set to "Awaiting Manager Approval".
- Description**: A rich text editor with a toolbar.
- Evidence Link**: A field with a dropdown arrow.
- Evidence Provider**: A text input field.
- Date completed**: A date picker set to "January" and an **Enable** checkbox. A callout bubble points to the **Enable** checkbox with the text: "Add file by searching File Explore." A yellow arrow also points from this callout to the **Enable** checkbox.
- File attachments**: A file upload area with a callout bubble pointing to it with the text: "Add file by dragging and dropping." Another callout bubble points to the file upload area with the text: "Change how files are viewed."
- Buttons: **Save evidence item** and **Cancel**.

The screenshot shows the "Radar" interface with the "CPD Log for Demo 2" page. The page includes a search bar and a filter for "Evidence". A callout bubble points to the "Evidence" filter with the text: "Once you have added your external evidence it will appear in the Evidence awaiting approval block on your CPD log." On the right side of the page, there is a block titled "Evidence Awaiting Approval" which contains a table with the following data:

Evidence Name
Conference

How to approve evidence

System: Radar (Strategi Institute's learning management system)

Audience: All users

Date: 18 Jan 2024

System rules:

To self-approve your own external evidence will require the necessary permissions in Radar.

Process steps and screenshots

1. **Approve evidence**
 1. Navigate to **Dashboard**.
 2. Scroll down to the **Approve my evidence** block.
 3. Select **Approved** from the drop down.

Name	Approval
Conference	Awaiting Manager Approval
Test	Awaiting Manager Approval
test 6	Awaiting Manager Approval
Test - evidence name	Awaiting Manager Approval
Test	Approved
Cyber security training - Mar 2019	Approved

Type	Name	Provider	CPD Hours	Time completed
		Strategi	1.00	XXXXXXXX
		ABC Ltd	0.50	XXXXXXXX
		Test Ltd	2.50	XXXXXXXX
		abc	1.00	XXXXXXXX
		abc	2.00	XXXXXXXX
		abc	1.00	XXXXXXXX
		abc	3.00	XXXXXXXX
		abc	4.00	XXXXXXXX
	Test - evidence name	Test	1.00	XXXXXXXX
	A guide to the FMA's view of conduct	Strategi Institute	0.75	XXXXXXXX
	Doing more with less: time management and productivity	Strategi Institute	0.75	XXXXXXXX
	Don't do things for Word, let Word do it for you	Strategi Institute	0.00	XXXXXXXX

How to find a training module

System: Radar (Strategi Institute’s learning management system)

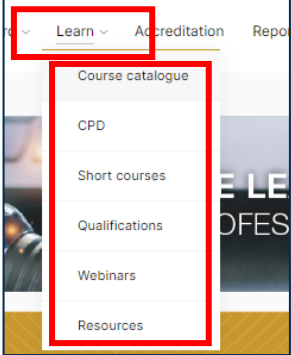
Audience: All users

Date: 18 Jan 2024

Radar allows multiple methods of locating specific training modules, from browsing to searching to quick links.


Process steps and screenshots

Browse

<p>1.</p>	<p>Learn landing page</p> <ol style="list-style-type: none"> Go to Learn (via navigation menu). Select Course catalogue to display all training, or Select from one of the following pre-filtered sub-menus: <ul style="list-style-type: none"> ○ CPD. ○ Short courses. ○ Qualifications. ○ Webinars. ○ Resources. 	<p>CPD modules: Short, self-directed learning requiring reading or watching something and passing a short assessment to earn CPD hours.</p> <p>Short courses are packaged programmes. They contain articles, activities, and longer assessments that earn CPD hours when passed.</p> <p>Qualifications are approved and accredited by the New Zealand Qualifications Authority (NZQA). They contain online course manuals, activities, and assessments that lead to a qualification or micro-credential.</p> <p>Webinars are recorded videos. These do not have assessments so no CPD hours will be allocated when these modules are completed.</p> <p>Resources are informational documents, articles, or other media (not videos). These also don’t have assessments and CPD hours attached.</p> 
<p>2.</p>	<p>Filter sub-page</p> <p>Based on the sub-menu selected, the sub-page could contain 250 + modules. To filter the outputs:</p> <ol style="list-style-type: none"> Click on relevant titles from: <ul style="list-style-type: none"> ○ SECTOR. ○ ROLE. ○ AREA OF INTEREST. ○ TYPE. <p>The filtering is dynamic and new subsets will be returned as each filter is selected.</p> Select Clear to conduct a new filter. 	

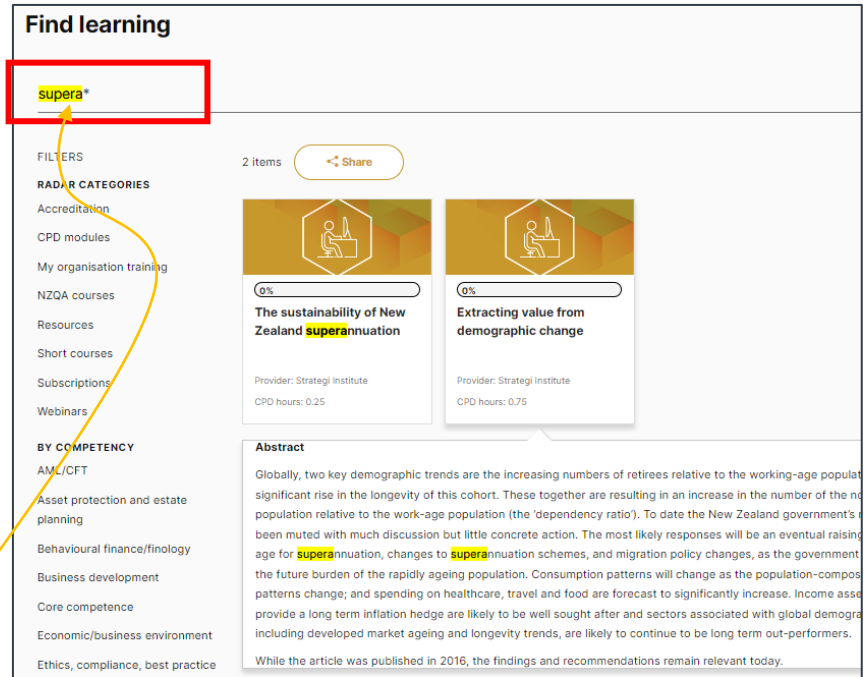
NOTES:

- The page will show the first 40 modules. Scroll to the bottom of the page and select **Load more** as required.
- Multiple titles can be selected from within each filter category.
- Featured modules will appear at the top of the list.

1. **Learn landing page**
 1. Go to **Learn** (via navigation menu).
 2. Select **Course catalogue** to display all training.
 3. Type your search term and press **<Enter>** on your keyboard or the magnifying glass () icon.

NOTES:

- Radar search is very sensitive to random spaces or commas. For best results use a key word only, or a wildcard (i.e. *) for a partial search term.
- The search will return any value from within the course *title* or course *abstract* (description).
- You cannot use AND/OR operators in Radar Search.
- Use the 'remove search filter' (x) icon and refresh your screen if you're not getting search results you expect



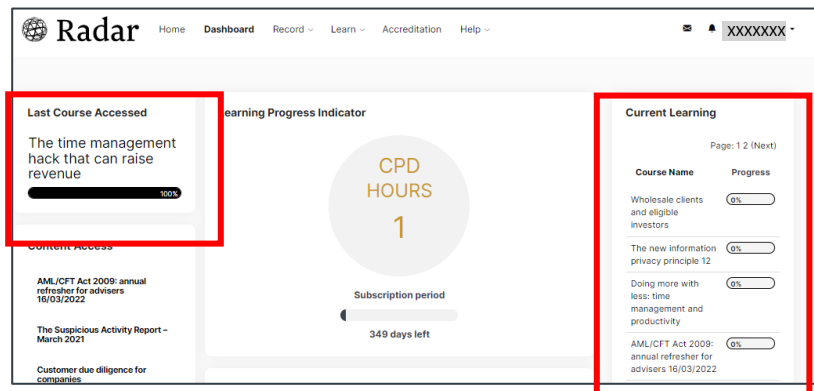
Quick links

This method of finding a module is useful if you have already accessed the training.

1. **Access dashboard**
 1. Select **Dashboard** (via navigation menu).

From this page you will be able to:

 - Select your **Last course accessed** module.
 - Select any module from the **Current learning** list.



How to complete a training module

System: Radar (Strategi Institute's learning management system)

Audience: All users

Date: 18 Jan 2024

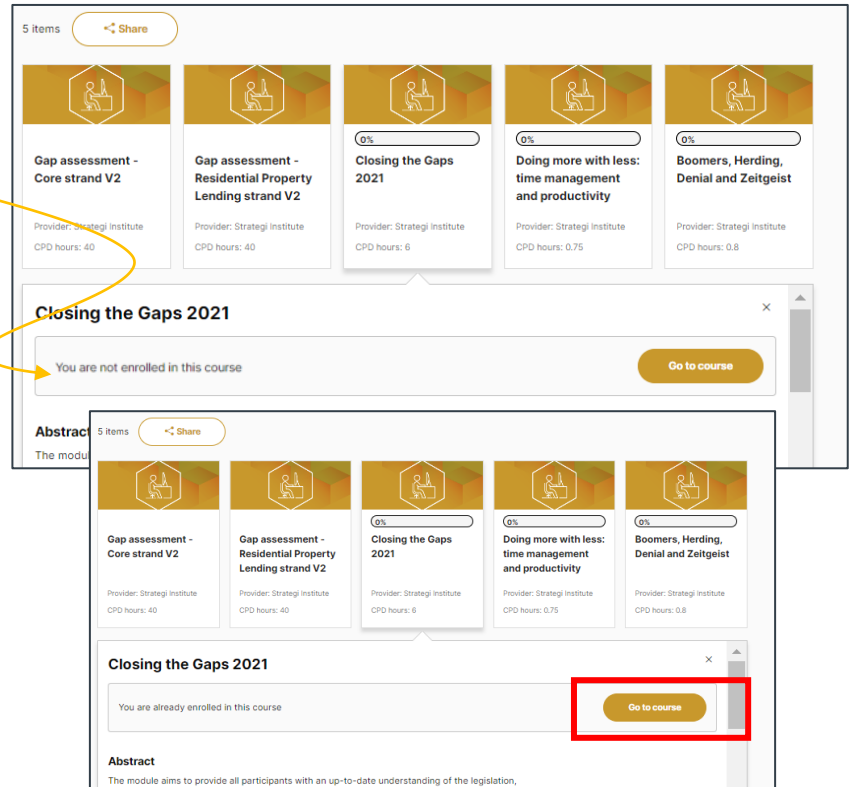
Once you have located your desired module follow the steps below to access and complete.

Process steps and screenshots

Access module

1. Determine eligibility

1. Click on the desired module title from the tile.
2. Read the eligibility statement under the title. If:
 - *You are not enrolled in this course* then [contact us](#) via the help menu to start the enrolment process.
NOTE: The course fees will display under the **abstract** section.
 - *You are already enrolled in this course* then select **Go to course**.
You will be taken to the module.



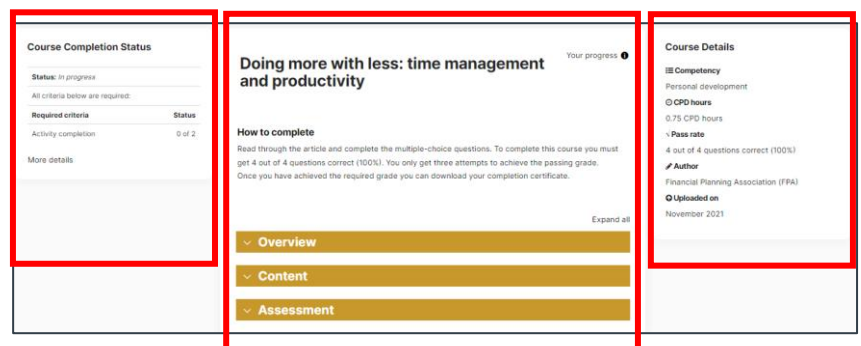
Complete module

2. View module information

Every CPD module will contain the following 3 panels:

1. Course completion status.
2. The module.
3. Course details.

Basic information such as which area of interest the module is classified to, the number of CPD hours, how many questions are in the assessment, and the author of the learning material.



<p>3.</p>	<p>Complete module</p> <ol style="list-style-type: none"> 1. Read How to complete panel. If there is any pre-module reading, complete this before starting any other activities. 2. Read the Overview. Open the panel by clicking on the panel title or select Expand all. 3. Read the Content. Open the content by clicking on the article. Take notes if desired to assist with the assessment questions. 	
<p>4.</p>	<p>Commence assessment</p> <ol style="list-style-type: none"> 1. Open the Assessment panel. 2. Read the section to understand the terms of the assessment. 3. Click the 'Misconduct in assessment' hyperlink to read the terms. 4. Tick the 'Misconduct in assessment' checkbox. 5. Select Assessment questions. 	
<p>5.</p>	<p>Complete assessment</p> <ol style="list-style-type: none"> 1. Select Attempt quiz now. 2. Navigate each question and complete as requested. 3. Select Submit all and finish. 4. Select again to confirm. <p>NOTES:</p> <ul style="list-style-type: none"> ○ Radar will immediately present your pass mark. ○ You can re-sit the quiz by selecting Finish review. 	

Download certificate

Upon successful completion of the module, the **Completion** panel will be presented within the module.

1. **Retrieve certificate**
 1. Open the **Completion** panel.
 2. Select **Completion certificate**.
 3. Select **View certificate**.
This will download the certificate to your PC's download folder.
 4. Navigate to certificate and print as desired.

The screenshot shows the 'Completion' panel with a congratulatory message. The 'Completion certificate' button is highlighted with a red box. Below it is a 'View certificate' button. A file explorer window shows 'Completion_certificate.pdf' downloaded. A sample certificate is also visible.

Provide feedback

We constantly strive to make all our training relevant and practical and welcome feedback for quality improvements. Answers are anonymous unless otherwise selected.

1. **Complete feedback**
 1. Open the **Completion** panel.
 2. Select **Feedback**.
 3. Select **Answer the questions**.
 4. Complete Form.
 5. Select **Submit your answers**.

The screenshot shows the 'Completion' panel with a congratulatory message. The 'Feedback' button is highlighted with a red box. Below it is a 'Feedback' form with questions and a 'Submit your answers' button highlighted in red.

How to access an NZQA qualification or micro-credential

System: Radar (Strategi Institute's learning management system)

Audience: Students enrolled for an NZQA qualification, course, or micro-credential.

Date: 18 Jan 2024

Assumptions:

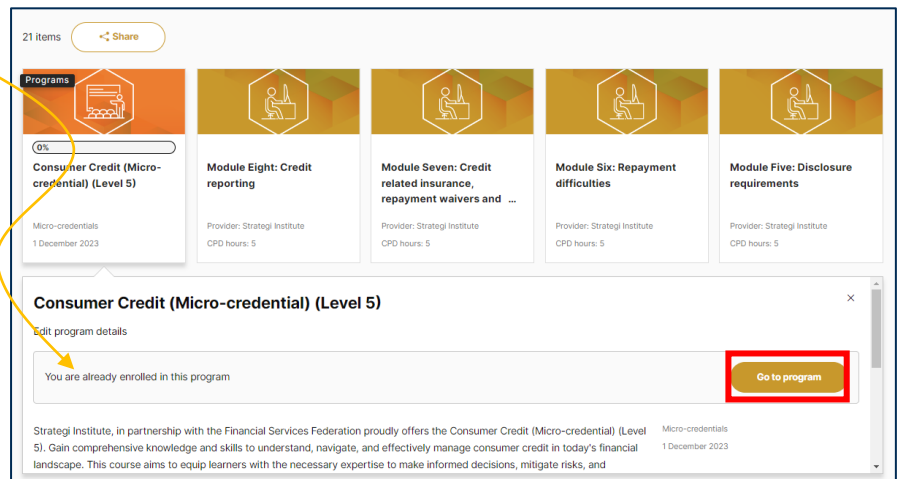
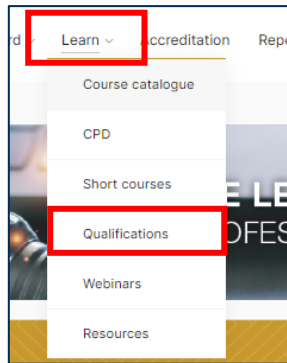
Instructions assume the reader has applied to enrol and received a confirmation of enrolment from Strategi Institute.

Process steps and screenshots

Access learning

1. Find your training

1. Go to **Learn** (via navigation menu).
2. Select **Qualifications** sub-menu.
3. Click on the course, qualification, or micro-credential you have enrolled for.
4. Read whether you have access under the title. If:
 - *You are not enrolled in this programme* then [contact us](#) via the help menu to start the enrolment process.
NOTE: The course fees will display under the **abstract** section.
 - *You are already enrolled for this programme* then select **Go to programme**. You will be taken to the program which will take you to the programme details page.



2. **Programme details page**
- The programme details page will tell you:
- The date you were assigned to the training.
 - The due date everything needs to be completed by.
 - Your progress towards completing
 - A breakdown of the courses/modules you need to complete and your progress.

Consumer Credit (Micro-credential) (Level 5)

You are required to complete this program under the following criteria:

- Assigned as an individual.

Date assigned: 15 December 2023

Due date: 12 March 2024, 12:00 AM

Progress: 0%

Mandatory modules to complete

All courses in this set must be completed (unless this is an optional set).

Allow at least 1 day(s) to complete this set.

Course name	Actions	Status
Module One: Legislative framework	Launch Training	0%
Module Two: Stakeholders	Launch Training	0%
Module Three: CCCFA requirements	Launch Training	0%
Module Four: Responsible lending	Launch Training	0%
Module Five: Disclosure requirements	Launch Training	0%
Module Six: Repayment difficulties	Launch Training	0%
Module Seven: Credit related insurance, repayment waivers and extended warranties	Launch Training	0%
Module Eight: Credit reporting	Launch Training	0%

3. **Launch training**
1. Click **Launch training** next to the module/course you wish to complete.
- NOTE: We recommend completing the training in the order displayed in the programme.

Mandatory modules to complete

All courses in this set must be completed (unless this is an optional set).

Allow at least 1 day(s) to complete this set.

Course name	Actions	Status
Module One: Legislative framework	Launch Training	0%
Module Two: Stakeholders	Launch Training	0%
Module Three: CCCFA requirements	Launch Training	0%
Module Four: Responsible lending	Launch Training	0%
Module Five: Disclosure requirements	Launch Training	0%
Module Six: Repayment difficulties	Launch Training	0%
Module Seven: Credit related insurance, repayment waivers and extended warranties	Launch Training	0%
Module Eight: Credit reporting	Launch Training	0%

4. **Complete training**

1. Read **How to complete** panel. If there is any pre-module reading, complete this before starting any other activities.
2. Read the **Overview**.
3. Open the **Terms and conditions** panel.
4. Click the hyperlink to view and comprehend the 'Terms and conditions'.
5. Tick the 'Terms and conditions' checkbox.

Once ticked the remaining panels will appear.

Module One: Legislative framework Your progress ●

How to complete

Please note, you must tick you agree to the terms and conditions before you can access the course content.

We recommend completing each module in the order displayed in the programme. There are eight modules to complete and pass within 16 weeks. You must pass each assessment to complete the programme.

To complete this module, please read through the manual and complete the assessment. You get three attempts to pass your assessments and can only receive a grade once you have passed the assessment.

Expand all

Overview

Terms and conditions

Before you begin, please ensure you understand our terms and conditions of Radar. [Click here to view the terms and conditions relating to Radar.](#)

You must tick the check box (right-hand side) to confirm your acceptance of those terms and conditions before you can access and complete the learning.

If unticked you will not be able to continue.

Course content

Assignment instructions

Assignment resources

Assignment submission portals

How to submit assignments

System: Radar (Strategi Institute’s learning management system)

Audience: Students enrolled for an NZQA qualification, course, or micro-credential.

Date: 18 Jan 2024

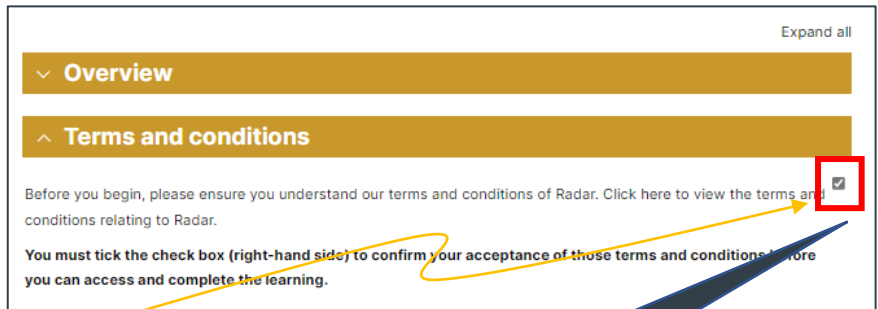
Qualifications usually require students to submit assignments as part of the assessment criteria.

Process steps and screenshots

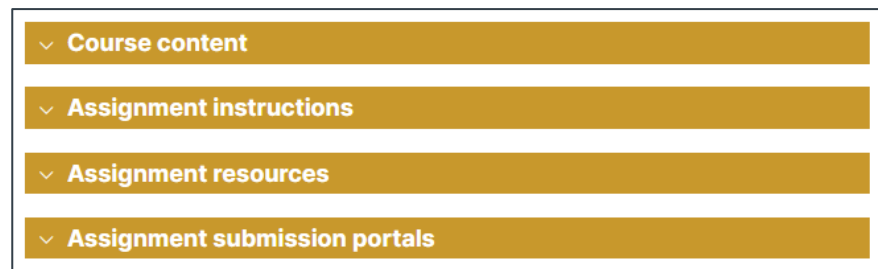
Prepare for assignment

1. **Agree to terms and conditions**
 6. Access the desired Qualification course page.
 7. Open the **Terms and conditions** panel.
 8. Click the hyperlink to view and comprehend the ‘Terms and conditions’.
 9. Tick the ‘Terms and conditions’ checkbox.

Once ticked the remaining panels will appear.

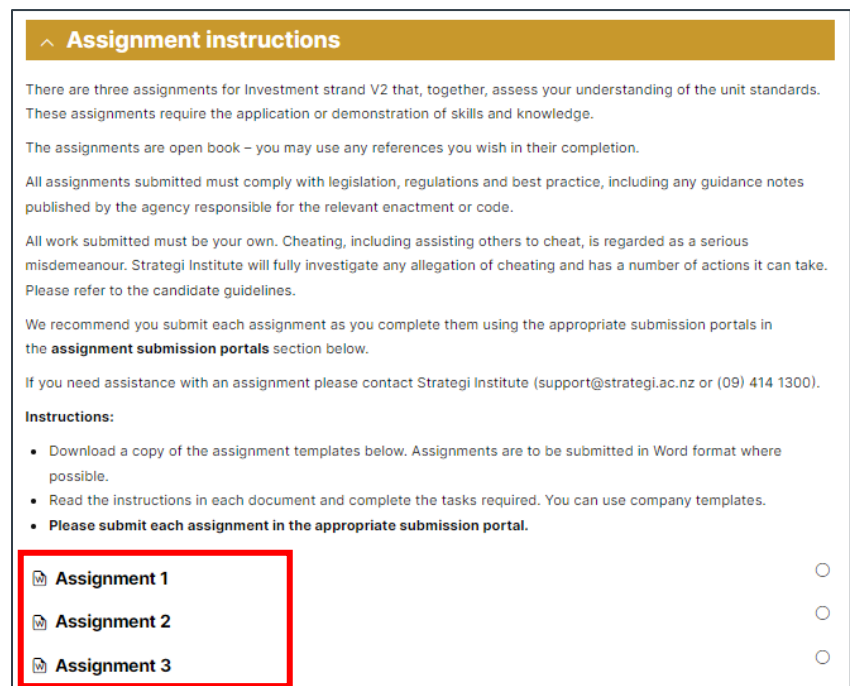


If unticked you will not be able to continue.



2. **Download Assignment/s**
 1. Open the **Assignment instructions** panel.
 2. Read instructions.
 3. Download assignment document(s).

These will download to your PC’s download folder.
 4. Navigate to assignment document/s and save to desired location.



<p>3.</p>	<p>Download resources</p> <ol style="list-style-type: none"> 1. Open the Assignment resources panel. 2. Select Assignment resources/templates. You will be taken to the <i>resource / templates</i> sub-window. 3. Select Download folder. 4. Download assignment templates. These will download to your PC's download folder as a zip file. 5. Navigate to assignment resources/template(s) and save to desired location. 	<p>Assignment resources</p> <p>Where documentation is required to be supplied, you may use the appropriate documentation from your workplace, or you may use the templates provided in this section.</p> <p>These templates are examples provided for training purposes only and should not be relied on in your everyday work.</p> <p>Assignment resources/templates</p> <ul style="list-style-type: none"> 1. Learning Resource - Disclosure template (stages 1 23 4) V1 (2).docx 2. Learning Resource - Investment SOA template.docx 3. Learning Resource - Fact find - Investment template.doc FNZ-Disclosure-Statement (3).pdf Guidance Note - New Disclosure Requirements For FAPs v2 (4).pdf IS V2 Assignment - Case Studies.pdf IS V2 Assignment 3 - Evidence checklist .docx MyFiduciary_RAQ Guidance Score.pdf MyFiduciary_RAQ.pdf OAPS_Client_Agreement.pdf <p>Download folder</p>
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Complete assignment

1	<p>Complete assignment/s: NOTE: Assignments are to be submitted in Microsoft Word format.</p>
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Submit assignment

<p>1.</p>	<p>Complete attestation</p> <ol style="list-style-type: none"> 1. Access the NZQA Course. 2. Open the Assignment submission portals panel. 3. Read the Instructions. 4. Attest to each declaration by ticking the checkboxes. <p>Once ticked the assignment submission portal links will appear.</p>	<p>Assignment submission portals</p> <p>We recommend you submit each assignment as you complete them using the submission portals. Before you can access the submission portals and submit your assignments, you must attest to the following statements by ticking the box to the right of all of them.</p> <p>Instructions:</p> <ul style="list-style-type: none"> • Assignments are to be submitted in Word format where possible. • Please submit each assignment in the appropriate submission portal. • Please allow 14 days to receive feedback from your assessor. <p>Please note, if your assignment requires some rework, please add your rework to the same document, in a different colour underneath your assessor's feedback (leave your assessor's comments in). Please note, you must resubmit your assignment within 14 days of receiving it back.</p> <p>I understand:</p> <p>The marking and rework turn-around timeframes (14 days), how I will be assessed, and what information or material is expected from me. <input checked="" type="checkbox"/></p> <p>That, if it is found that the answers submitted are not my own, further action may be taken. Please refer to the terms and conditions of your enrolment for more information. <input checked="" type="checkbox"/></p> <p>The appeals process should I wish to appeal the result of my assessment. <input checked="" type="checkbox"/></p> <p>I am aware that the evidence submitted is my own work, and I have not plagiarised any work from any institute and NZQA. <input checked="" type="checkbox"/></p> <p>I certify that:</p> <p>All the work in the assignment is my own work, and I have not plagiarised any work from any client(s), except where I have acknowledged otherwise. If a client(s) is named, I must also be made by me alone, unless otherwise acknowledged as the work of other people. No work has been directly copied from sources other than the material provided to me. <input checked="" type="checkbox"/></p> <p>Where applicable, I have removed identifiable client information to protect client confidentiality. <input checked="" type="checkbox"/></p> <p>All of my work complies with any relevant legislative, regulatory and professional codes of practice. <input checked="" type="checkbox"/></p> <p>Assignment 1 submission portal <input type="radio"/></p> <p>Assignment 2 submission portal <input type="radio"/></p> <p>Assignment 3 submission portal <input type="radio"/></p>
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2.

Upload assignment

1. Click the relevant assignment hyperlink.

You will be taken to the *Assignment submission* sub-window.

2. Select **Add submission**.

You will be taken to a second *Assignment submission* sub-window.

3. Upload files by using:

- Drag and drop or
- File browser

If using file browser method, you will be taken to a *file picker* sub-window.

- Complete the form.
- Select **Upload this file**.

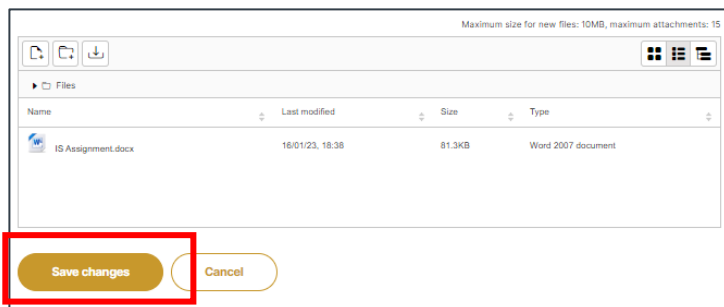
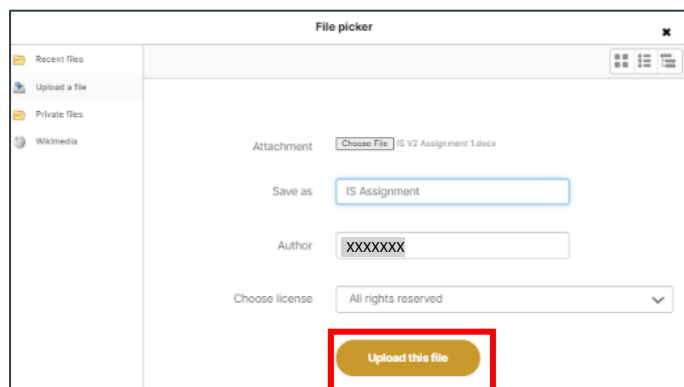
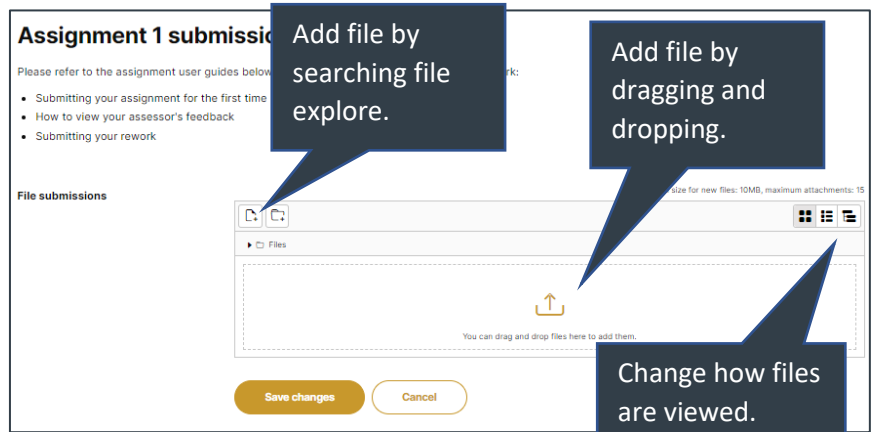
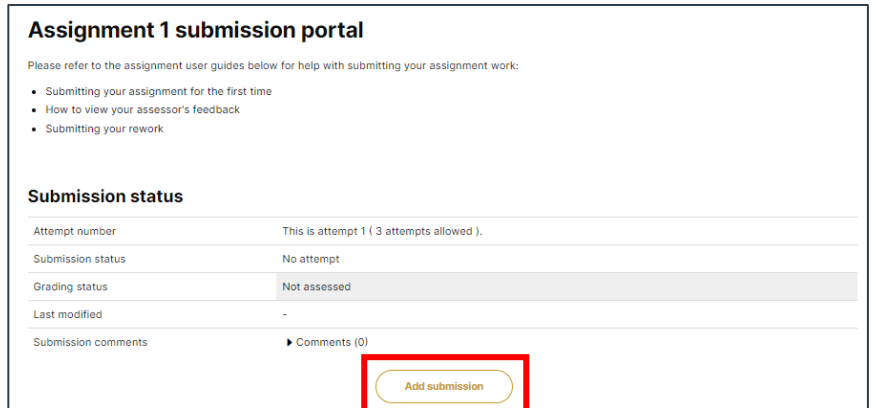
You will be returned to the second *Assignment submission* sub-window.

For both file upload methods:

4. Select **Save changes**.

You will be returned to the first *Assignment submission* sub-window.

NOTE: If you assignment it too large or your have too many files, try uploading it in a zip folder.



3.

Submit assignment

1. Confirm you're happy that all correct files have been loaded and named appropriately.

NOTE: You can choose **Edit submission** if you wish to make changes.

2. Select **Submit documents**.
You will be taken to the *submission confirmation* sub-window.

3. Select **Continue**.
You will be taken to the *submission status* sub-window.

NOTES:

- Once documents have been submitted you cannot make changes to your assignment.
- You and your assessor will receive an email confirming your submission.

- Depending on which course you're doing, you may be taken to a sub-screen which requires you to confirm the document is your own work:
 - Tick the Attestation check box.
 - Select **Continue**.

Assignment 1 submission portal

Please refer to the assignment user guides below for help with submitting your assignment work:

- Submitting your assignment for the first time
- How to view your assessor's feedback
- Submitting your rework

Submission status

Attempt number	This is attempt 1 (3 attempts allowed).
Submission status	Draft (not submitted)
Grading status	Not assessed
Last modified	Monday, 16 January XXXXXXXX
File submissions	IS Assignment.docx
Submission comments	Comments (0)

Edit submission

Click add submission to upload your completed document(s) or edit submission to make changes to your document(s).

Submit document(s)

You must submit your document(s) and complete the attestation before your work will be assessed. You will not be able to make any more changes once your work is submitted.

Use Edit submission to make corrections.

Assignment 1 submission portal

Please refer to the assignment user guides below for help with submitting your assignment work:

- Submitting your assignment for the first time
- How to view your assessor's feedback
- Submitting your rework

Confirm submission

Are you sure you want to submit your document(s)? You will not be able to make any further changes after you click continue.

Continue **Cancel**

Before you can submit your documents, you must complete the attestation below.

Attestation

This document is my own work, and where applicable relates to my own client(s), except where I have acknowledged otherwise are required, the changes I make must also be made by me alone, unless otherwise acknowledged as the work of other people.

Tick the box to agree to these terms and submit your document(s) for review. You will not be able to make any more changes.

Are you sure you want to submit your document(s)? You will not be able to make any further changes after you click continue.

Continue **Cancel**

4. **Submission status**

Assignments will be assessed within 14 days.

The system will auto-send you an email notification once the assignment has been assessed.

Assignment 1 submission portal

Please refer to the assignment user guides below for help with submitting your assignment work:

- Submitting your assignment for the first time
- How to view your assessor's feedback
- Submitting your rework

Submission status

Attempt number	This is attempt 1 (3 attempts remaining)
Submission status	Submitted
Grading status	Not assessed
Last modified	Monday, 16 January XXXX 6:59 PM
File submissions	IS Assignment.docx
Submission comments	Comments (0)

Note the **Grading status**.

How to access assignment feedback

System: Radar (Strategi Institute's learning management system)

Audience: Students enrolled for an NZQA qualification, course, or micro-credential.

Date: 18 Jan 2024

With an active enrolment, you will be able to login and check the status of your submission at any time.

Please allow 14 days to receive feedback.

Once your submission has been assessed, you will be advised as to whether you need to re-submit or whether you have passed. (To pass, you need to receive an Achieved grade or a mark of 100)

Once you have passed your assignments, if your course is NZQA accredited, your results go through quality assurance checks before your credits are uploaded to NZQA. Please allow 14 days for Strategi Institute to email confirmation you have passed.

Process steps and screenshots

- Find feedback**
 - Access the NZQA Course.
 - Select **Assignment submission portals**.
 - Click the relevant Assignment hyperlink.
You will be taken to the *Assignment submission* sub-window.

Note the **Grade**.

Previous attempts

▼ Attempt 1: Tuesday, 6 July XXXX, 11:56 AM

Submission status

File submissions  Assignment 3 - May XXXX.docx

Submission comments  Comments (0)

Feedback

Grade Not yet achieved

Assessed Thursday, 19 January XXXX, 11:44 AM



Nicole Greenslade - Admin

Feedback comments
Almost there - please see my feedback comments in the attached document.
Kind regards,
Strategi Institute Assessor

Feedback files  Assignment 3 - May XXXX.docx

How to submit rework

System: Radar (Strategi Institute’s learning management system)

Audience: All users

Date: 18 Jan 2024

If your Feedback Grade is Not yet achieved, or anything less than 100, this means your assignment wasn’t passed and you will need to redo your assignment and resubmit it within 14 days.

Complete the rework required and follow the steps below to resubmit.

Process steps and screenshots

- Commence resubmission**
 - Access the NZQA Course.
 - Select **Assignment submission portals**.
 - Click the relevant Assignment hyperlink.
You will be taken to the *Assignment submission* sub-window.
 - Select **Add a new submission based**.

Follow steps 2.3 - 2.6 (Upload Assignment) and steps 3.1 – 3.3 (Submit Assignment) to complete the rework submission.

