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IOB Learn

User Guide



Contents

Logging in, onboarding and homepage	2
Logging in and onboarding	2
Homepage	5
Accessing module material	6
Accessing CPD/designation resources	10
Accessing content channels and micro learning	12
IOB Store – access through IOB Learn	13
Re-registering for a module	13
Applying and registering for a new programme	14
Paying membership fees (including designation fee)	18
Registering for Events	19
Viewing and updating your details	21
Bookmarking	23
IOB Learn App	25
Downloading the app	25
Logging in and homepage	25
Accessing module material	29
Accessing CPD/designation resources	31
Accessing micro content	32
Logging out	33



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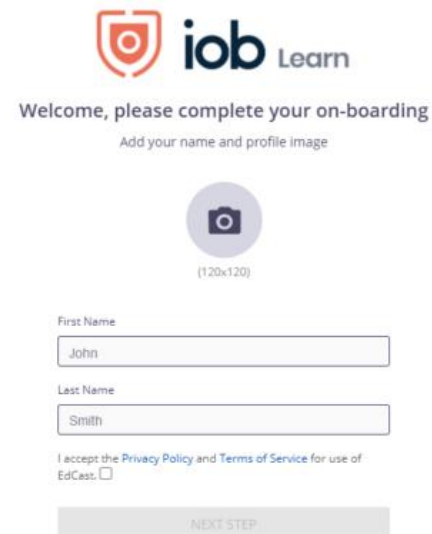
Logging in, onboarding and homepage

Logging in and onboarding

How you access IOB Learn on desktop remains the same – on our website www.iob.ie click on *Log in* (top right-hand corner), enter your email or membership number and password and click on *Log in*

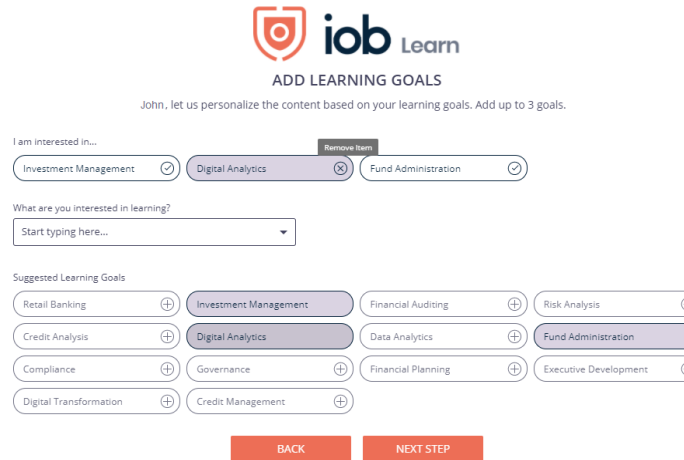
When logging into IOB Learn for the **first time** you will need to go through the onboarding process once you are logged in as follows:

- Your First Name and Last Name will be pre-populated and you will need to accept the *Privacy Policy* and *Terms of Service* for use
- Click on *Next step*



The screenshot shows the IOB Learn onboarding interface. At the top is the IOB Learn logo. Below it, the text reads 'Welcome, please complete your on-boarding' followed by 'Add your name and profile image'. There is a circular placeholder for a profile picture with a camera icon and the text '(120x120)'. Below this are two text input fields: 'First Name' with the value 'John' and 'Last Name' with the value 'Smith'. At the bottom, there is a checkbox labeled 'I accept the Privacy Policy and Terms of Service for use of EdCast.' and a grey button labeled 'NEXT STEP'.

- At the next stage you will be asked to *Add* your *Learning Goals* or areas you are interested in
- You can select any of the suggested learning goals if they are of interest to you or type them in. You can add up to 3 goals.
- You will need to select **at least one** learning goal before you can proceed
- If you wish to remove one of the selected one you just hover the mouse over the selected one and click on the x
- When happy with the goal(s) selected click *Next Step*



iob Learn

ADD LEARNING GOALS

John, let us personalize the content based on your learning goals. Add up to 3 goals.

I am interested in...

Investment Management ✓ Digital Analytics ✕ Fund Administration ✓

What are you interested in learning?

Start typing here...

Suggested Learning Goals

Retail Banking ⊕	Investment Management ⊕	Financial Auditing ⊕	Risk Analysis ⊕
Credit Analysis ⊕	Digital Analytics ⊕	Data Analytics ⊕	Fund Administration ⊕
Compliance ⊕	Governance ⊕	Financial Planning ⊕	Executive Development ⊕
Digital Transformation ⊕	Credit Management ⊕		

BACK NEXT STEP

- Next and final step will ask you to add your Skills.
- Type some skills and click on *Next* or you can skip this step if you wish



ADD SKILLS

Tell others what you are good at. This will appear on your profile and help us recommend you as a 'Subject Matter Expert'

What are you good at?

BACK

SKIP

- You will then be brought to the home page of IOB Learn

Search

Notifications

Jane •

More

IOB RECOMMENDS MY DAILY INSIGHTS



Jane Smith

My Learning Plan

QFA - Loans

0%

QUICK LINKS

Access CPD

PROGRAMME

Professional Diploma (New) in

Leading Cultural Change and Ethical Behaviour in Financial Services

Professional Diploma in Leading Cultural Change and Ethical

Course



MICRO CONTENT

The ABCs of LGBTQ+

A fun and interactive learning session which offers a comprehensive...

Video • 1h



Gerry Hussey on Mindset

Live Event



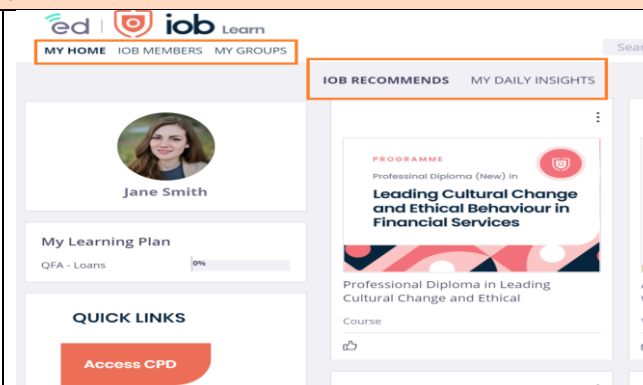
Homepage

Let's explore the homepage and what you can find here

When you log in you will be brought to the homepage.

Here you will find *IOB Recommends* and *My Daily Insights*.

You will also see two further tabs beside My Home – *IOB Members* and *Groups* which are explained in detail later on in the guide.



IOB Recommends is content, programmes, or events that IOB will highlight to members.

My Daily Insights will show you content curated for you, based on interests that you have selected, the first time that you logged in.

This content is personalised to each member and will add to your continuous learning.

IOB Members will contain:

1. *Member resources* – Here you can access administrative tools such as your CPD resources (if you are an active designate), correspondence, your details, the IOB Store and student information. You will also be able to access the Programme Info area containing information on our qualifications
2. *IOB content channels* – A rich source of learning content curated by IOB

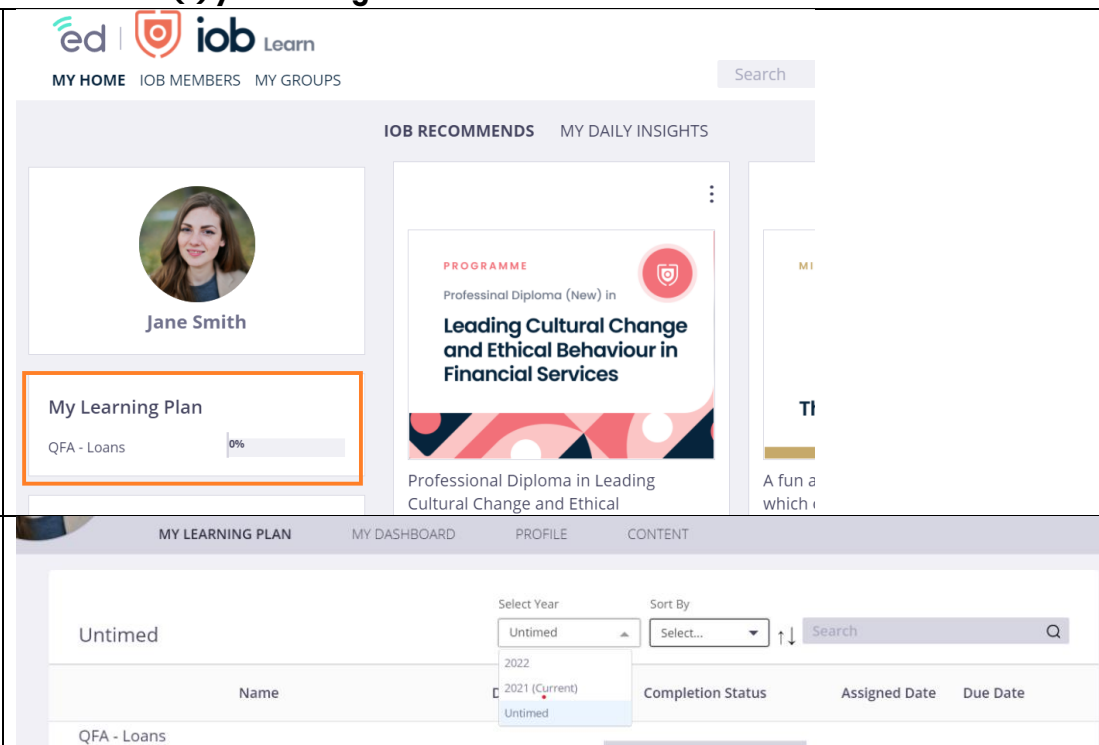
My Groups is a learning community to which you are assigned and into which access to certain of your learning (modules, short course) will be placed.

Accessing module material

There are two ways to access the module material for the module(s) you are registered to:

First way is as follows:

- Under *My Learning Plan* on the left-hand side of the screen, you will see all your modules listed.
- Click on the module you wish to access.



The screenshot shows the iob Learn dashboard for a user named Jane Smith. The 'My Learning Plan' section is highlighted with an orange box. It displays a list of modules, including 'QFA - Loans' with a 0% completion status. The dashboard also features a 'PROGRAMME' section for 'Leading Cultural Change and Ethical Behaviour in Financial Services' and a 'MY DAILY INSIGHTS' section.

Below the dashboard, the 'MY LEARNING PLAN' tab is selected, showing a table of modules. The 'Select Year' dropdown is set to 'Untimed', and the 'Sort By' dropdown is set to 'Select...'. The table lists modules with columns for Name, Completion Status, Assigned Date, and Due Date.

Name	Completion Status	Assigned Date	Due Date
QFA - Loans	0%		

Please note: If you do not see all of your modules listed you will need to click into the Learning Plan and change the Year to be 'Untimed'

- Click on *View More* to access the content for that module

QFA - Loans (01-MAR-21)



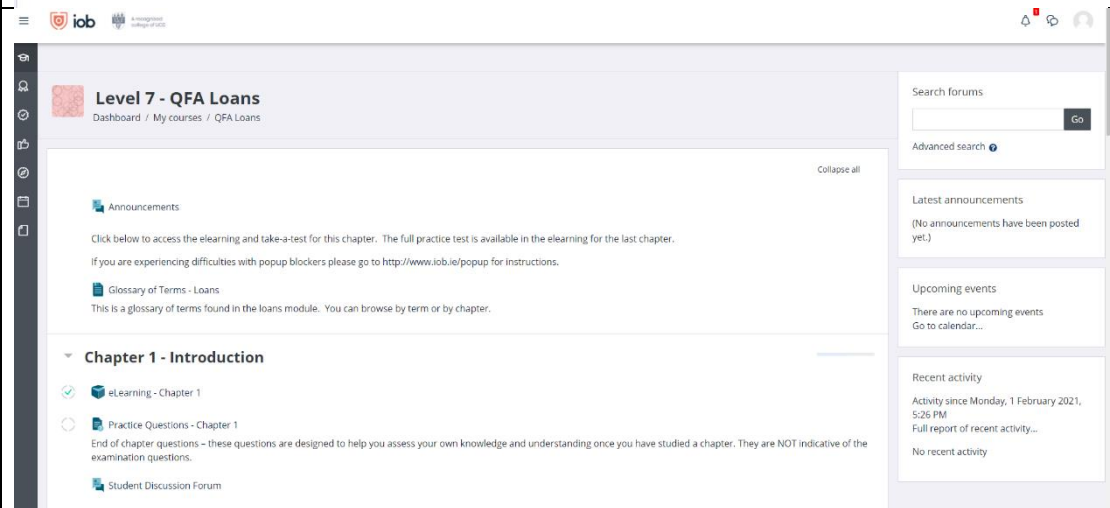
QFA - Loans (01-MAR-21)

[View More](#)

Unspecified • Private

Published Date: 20 Jan 2021

- This will then bring you to the module content that contains all the materials for your module including, study guide, readings, associated texts and MCQ tests
- Welcome email sent at the start of Trimester will include details on material available here



The screenshot shows the iob dashboard for the Level 7 - QFA Loans module. The dashboard includes a sidebar with navigation links, a main content area with announcements and chapter information, and a right-hand panel with search and activity feeds.

Level 7 - QFA Loans
Dashboard / My courses / QFA Loans

Announcements
Click below to access the elearning and take-a-test for this chapter. The full practice test is available in the elearning for the last chapter.
If you are experiencing difficulties with popup blockers please go to <http://www.iob.ie/popup> for instructions.

Glossary of Terms - Loans
This is a glossary of terms found in the loans module. You can browse by term or by chapter.

Chapter 1 - Introduction

- eLearning - Chapter 1
- Practice Questions - Chapter 1
End of chapter questions - these questions are designed to help you assess your own knowledge and understanding once you have studied a chapter. They are NOT indicative of the examination questions.
- Student Discussion Forum

Search forums
Go

Advanced search

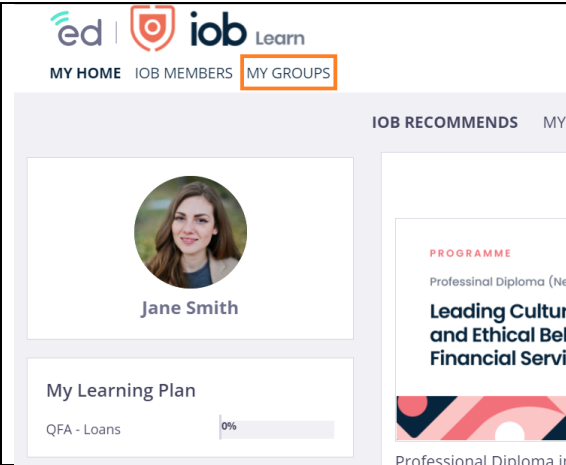
Latest announcements
(No announcements have been posted yet.)

Upcoming events
There are no upcoming events
Go to calendar...

Recent activity
Activity since Monday, 1 February 2021, 5:26 PM
Full report of recent activity...
No recent activity

Second way is as follows:

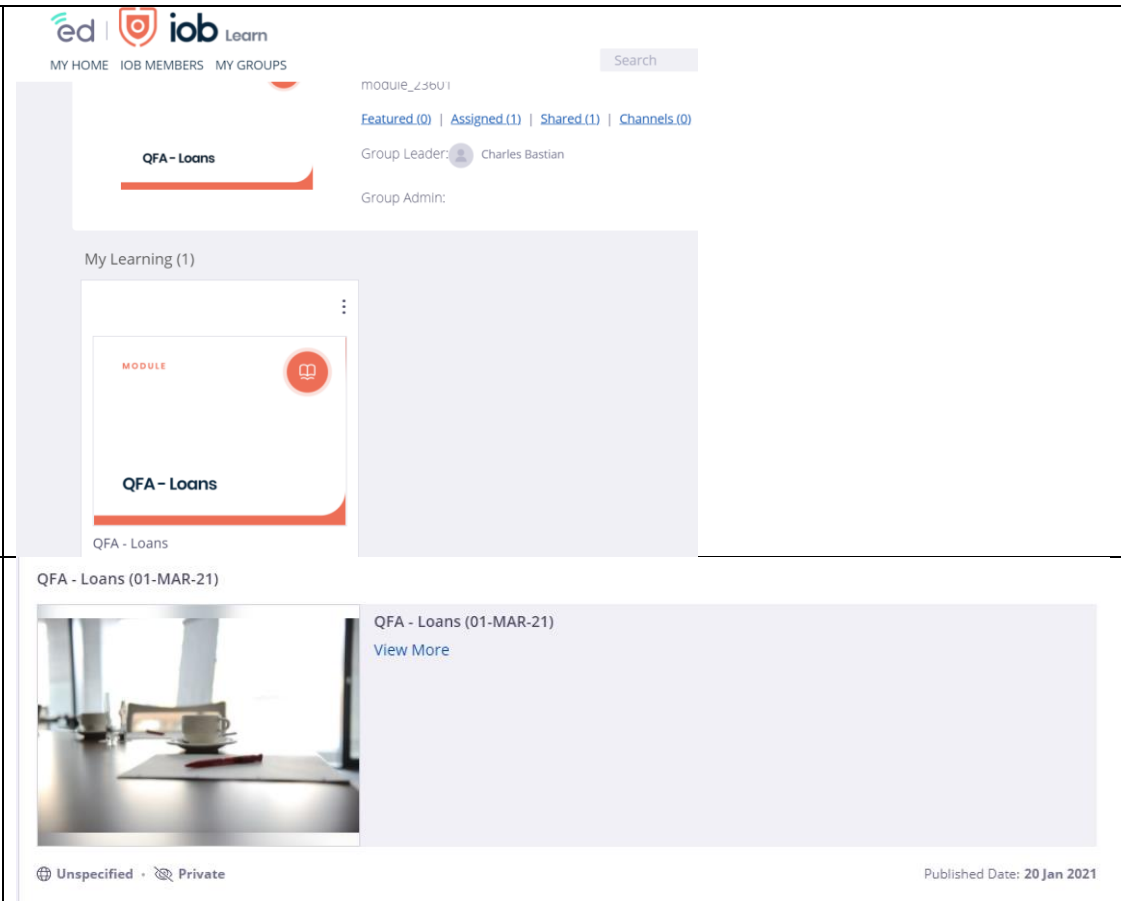
- Click *My Groups*



- Here you will see all the modules and short courses that you are registered for



- Click on to the group card that shows your module name and all the cards linked to this module will appear



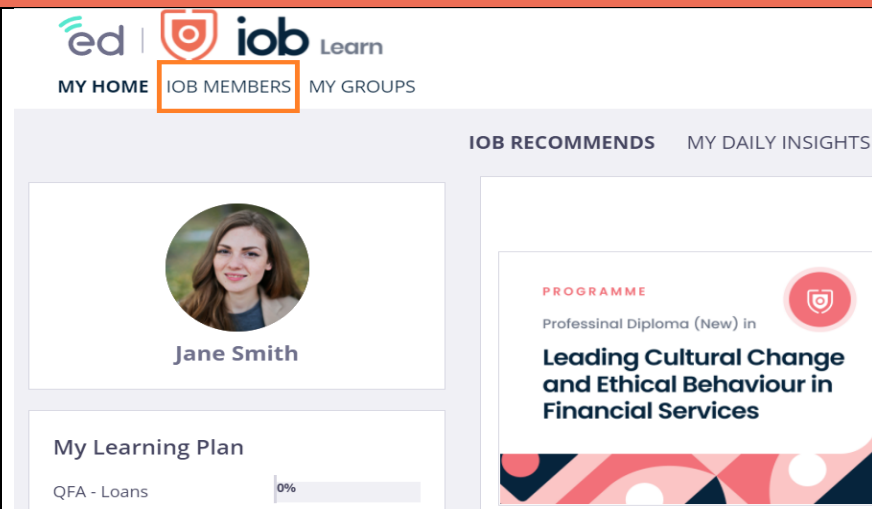
The screenshot displays the iob Learn interface. At the top, there are navigation tabs: 'MY HOME', 'IOB MEMBERS', and 'MY GROUPS'. A search bar is located on the right. Below the navigation, a 'QFA - Loans' module card is highlighted. To the right of the card, it shows 'module_23bu1', 'Featured (0)', 'Assigned (1)', 'Shared (1)', and 'Channels (0)'. Below this, it lists 'Group Leader: Charles Bastian' and 'Group Admin:'. Under the 'My Learning (1)' section, the 'QFA - Loans' module card is shown again. Below the card, the title 'QFA - Loans (01-MAR-21)' is displayed. To the left of the title is a thumbnail image of a desk with a cup and a book. To the right of the title is a 'View More' link. At the bottom left, there are icons for 'Unspecified' and 'Private'. At the bottom right, the 'Published Date: 20 Jan 2021' is shown.

- Click on module card with the name of the module and exam date on it, i.e “QFA Loans – 31 May 2021”.
- Click *View more*
- You will then be directed to the module content that contains all the materials for your module including, study guide, readings, associated texts and MCQ tests.

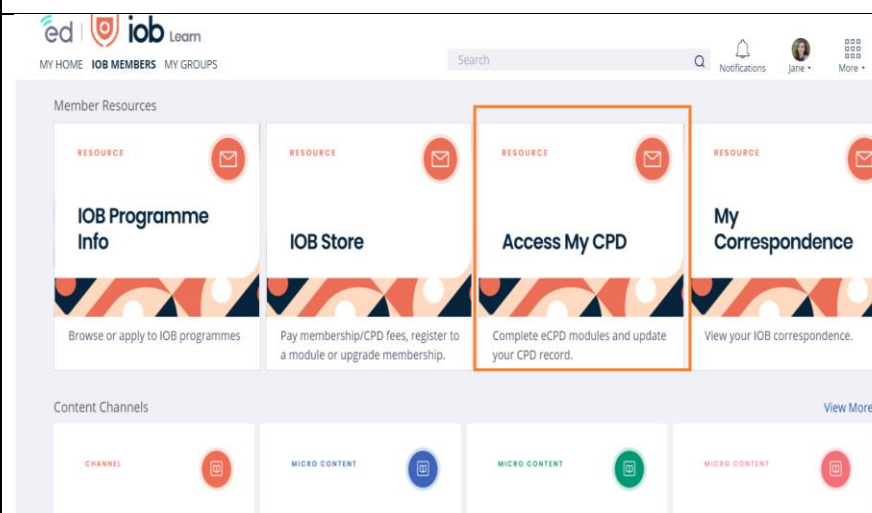
Accessing CPD/designation resources

If you wish to access your CPD resources:

- Click on IOB Members



- In the *Member resources section* Click *Access My CPD card*



- Click Go beside the designation that you wish to access.
- From here you can view your CPD record, record CPD hours request CPD accreditation for external events, download CPD documents

CPD

Close

Overview: CPD

0 of 15 CPD hours

QFA

Go


0 of 15 CPD hours

LCOI

Go

Completion date: 31st Dec 2021
332 days to complete your CPD hours

Annual return date: 31st Jan 2022
363 days to return your CPD hours



MEMBER N°

Category: Licentiate 1



WELCOME TO YOUR CPD HOURS

You are doing CPD for QFA

ACTIVE

CPD: QFA

Close

My eCPD

Close

1 HOUR - 30 DAYS

Consumer Credit

Use MOC, Peer Review, Teaching & Assessment, Research, Writing, Review, Consumer Credit

My Hours

2021

	Required	Remaining
Total hours	15	0
Life MOC	1	0
Peer Review	1	0

Annual Return

You must have recorded all of the approved events making up your CPD hours for 2021 in order to submit an annual return.

The closing date for annual return is 31 January 2022.

Failure to submit an annual return will result in the removal of your designation/CPD membership.

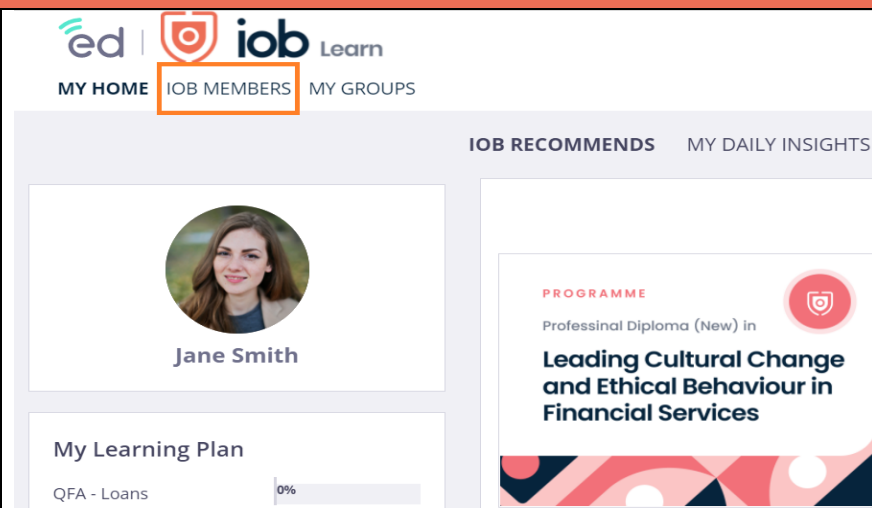
Subject	Required	Recorded
Total hours	15	15



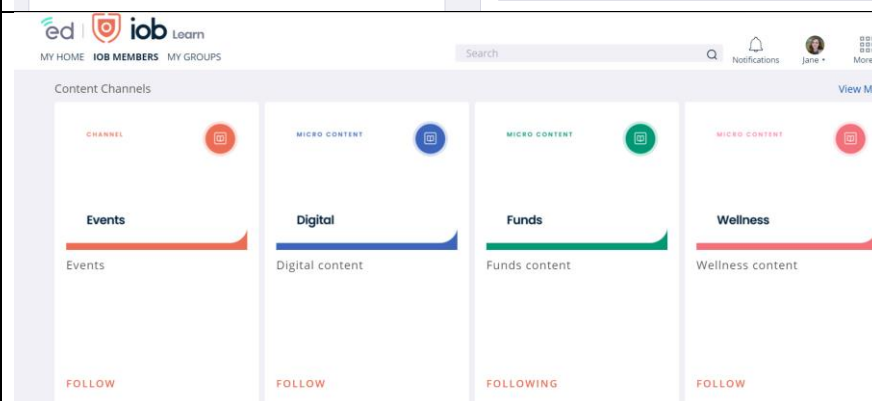
Accessing content channels and micro learning

Micro learning is a short piece of learning on a specific topic by an expert in the field. These micro learnings are short videos, podcast and articles ranging from 5 minutes to 60 minutes

- Click on *IOB Members*



- Here you will find Member Resources available on the top row of the screen and our new IOB Content Channels available on the second row
- Our channels are arranged by topic so just click on the topic you are interested in and it will bring you to a selection of content on this topic
- Micro content comprises videos, articles and podcast that take less than an hour to complete
- As well as technical topics we have resources available for career support and wellness

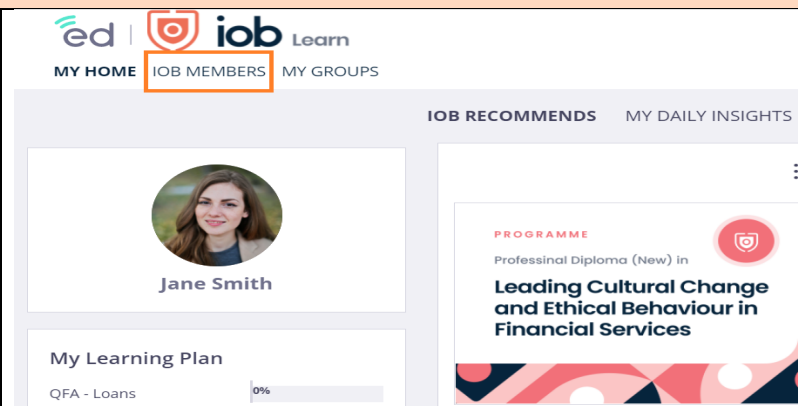


IOB Store – access through IOB Learn

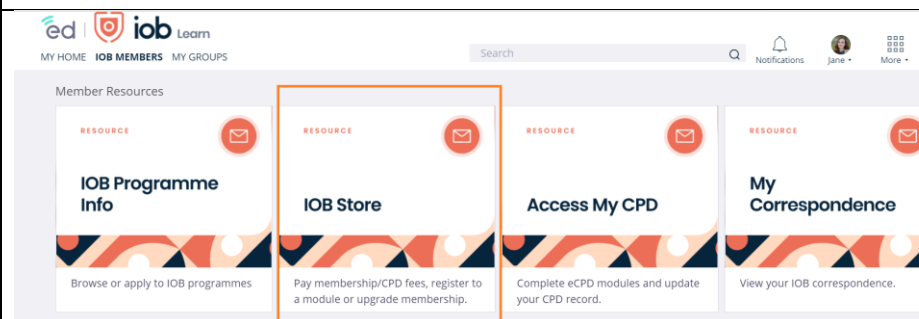
Programme enrolment and event registration can also be accessed directly through the website

Re-registering for a module

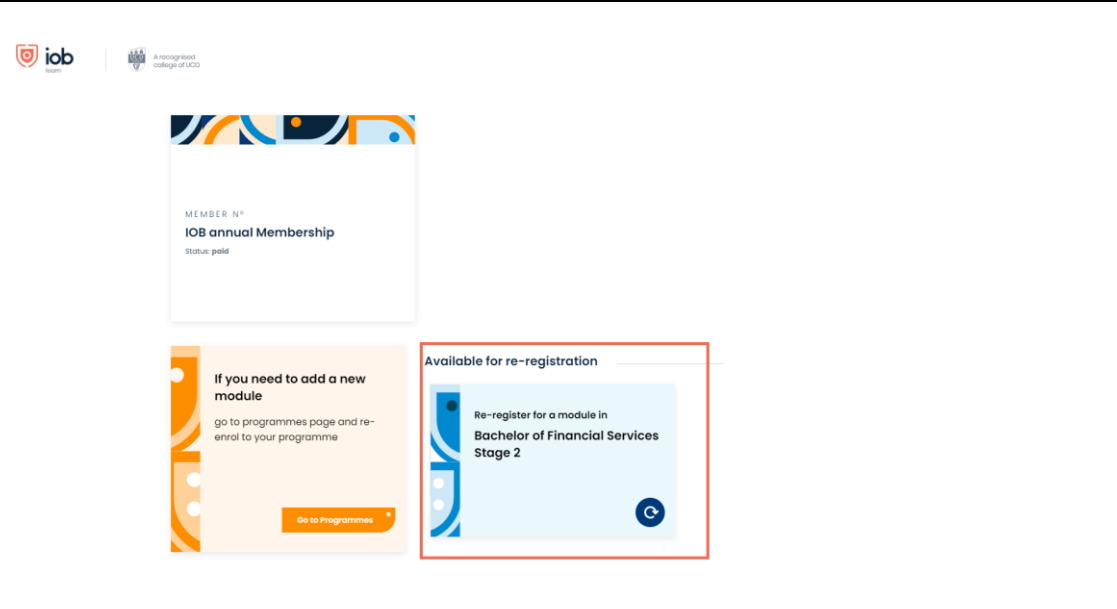
- Click on *IOB Members*



- Click *IOB Store* card

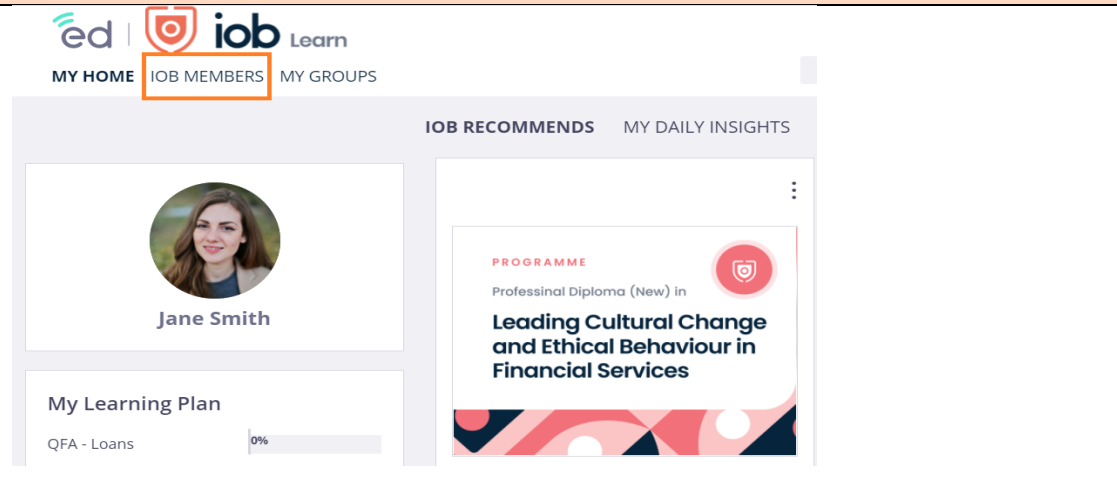


- You will be brought to the IOB Store where you click on the relevant card under *Available for re-registration* and follow the steps

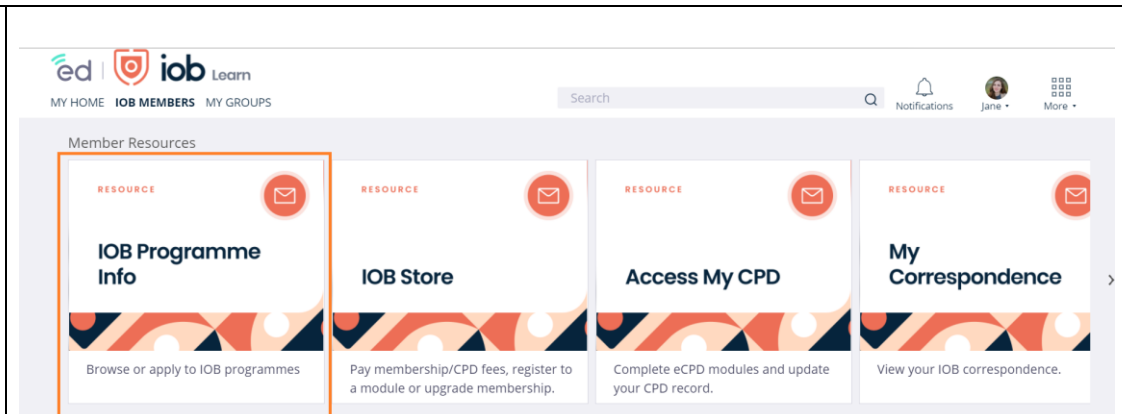


Applying and registering for a new programme

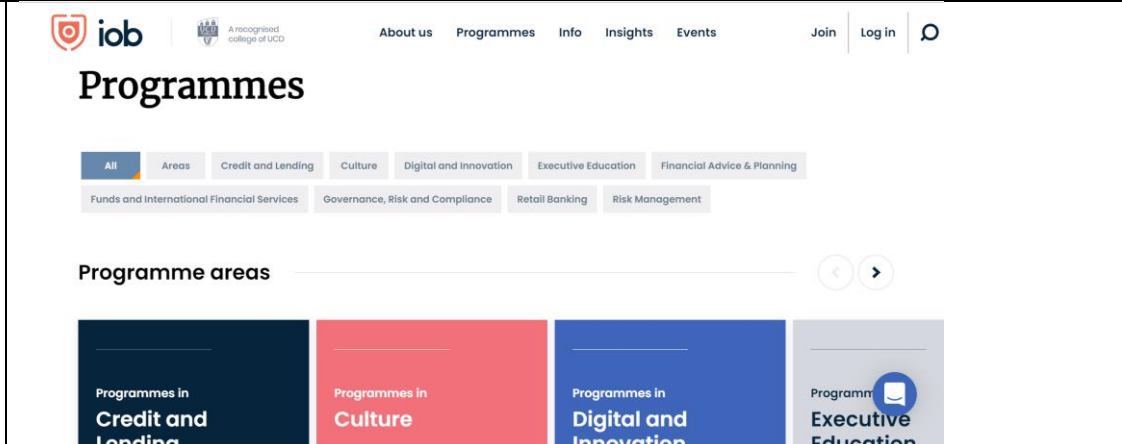
- Click on *IOB Members*



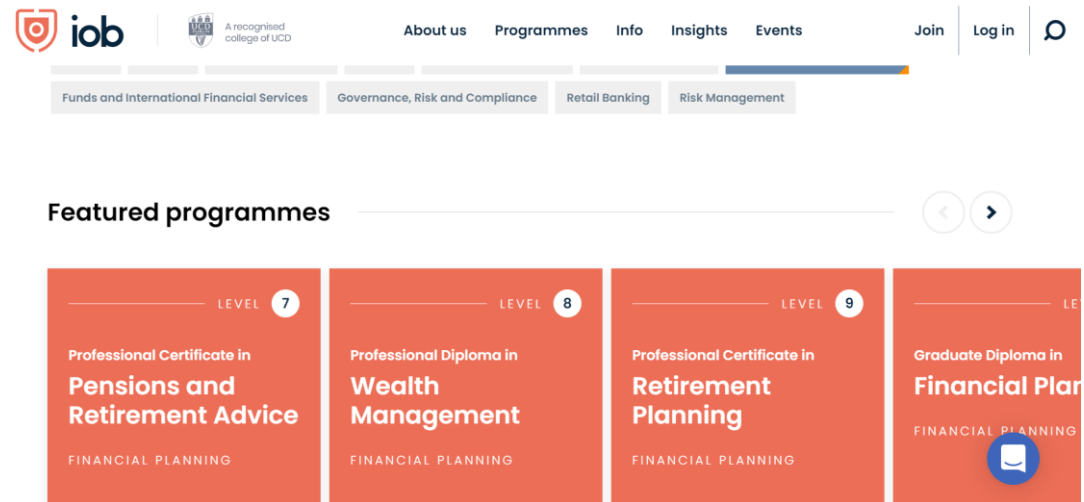
- Here you will see an IOB Programme Info card.
- This will take you to the section where you can view all the IOB programmes and click on the area that you are interested in.



- On the Programmes page click on the Relevant programme area you are interested in (e.g. Financial Advice & Planning)



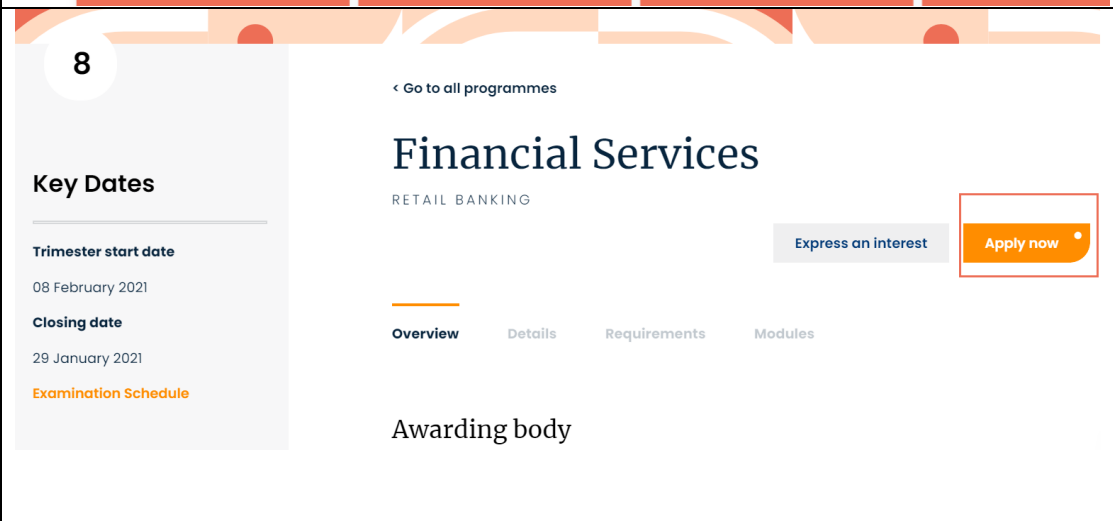
- From there you will see a list of Programmes available for that area. Click on the one you wish to apply to or register for.



The screenshot shows the iob website header with navigation links: About us, Programmes, Info, Insights, Events, Join, Log in. Below the header are four tabs: Funds and International Financial Services, Governance, Risk and Compliance, Retail Banking, and Risk Management. The main section is titled 'Featured programmes' and displays four programme cards:

- LEVEL 7**: Professional Certificate in Pensions and Retirement Advice (FINANCIAL PLANNING)
- LEVEL 8**: Professional Diploma in Wealth Management (FINANCIAL PLANNING)
- LEVEL 9**: Professional Certificate in Retirement Planning (FINANCIAL PLANNING)
- LEVEL 10**: Graduate Diploma in Financial Planning (FINANCIAL PLANNING)

- You will then be brought to the programme webpage
- Click on *Apply now* or *Enrol now*
- If there is an application process for your chosen programme, you must complete the *Apply now* screens
- For some programmes, you may be able to register directly for your programme modules and in this instance, you will see an *Enrol now* button

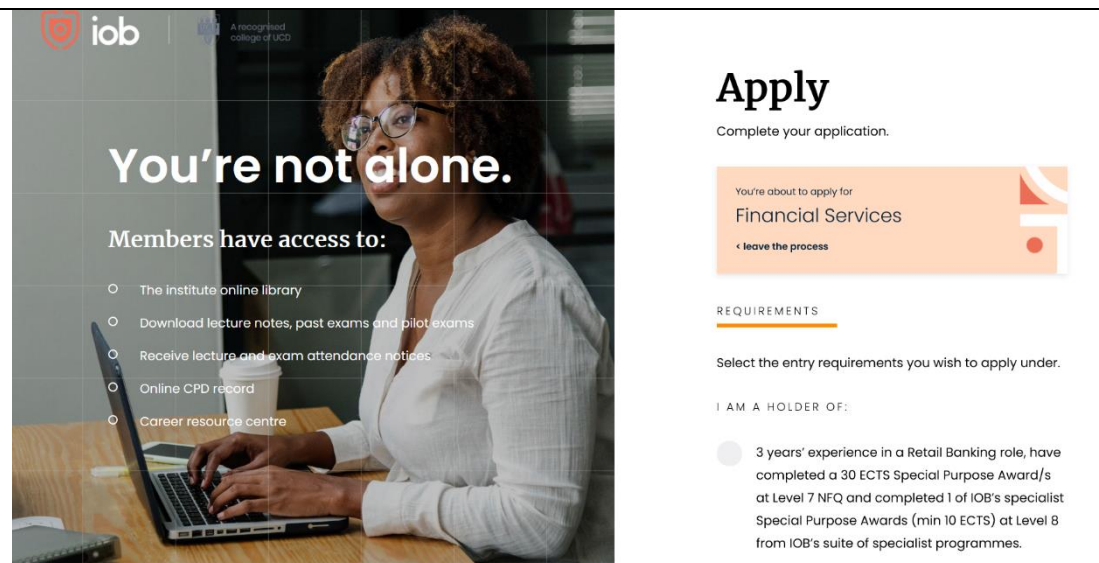


The screenshot shows the 'Financial Services' programme webpage. The page number '8' is visible in the top left corner. The page includes a 'Key Dates' section with the following information:

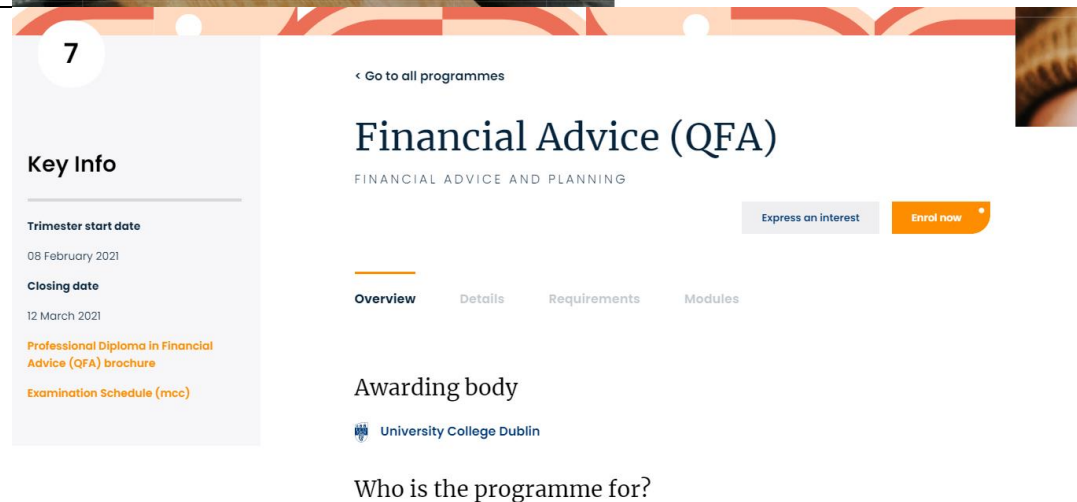
- Trimester start date**: 08 February 2021
- Closing date**: 29 January 2021
- Examination Schedule**: (Link)

The main heading is 'Financial Services' with the sub-heading 'RETAIL BANKING'. There are two buttons: 'Express an interest' and 'Apply now'. Below the heading are tabs for 'Overview', 'Details', 'Requirements', and 'Modules'. The 'Awarding body' section is partially visible at the bottom.

- Follow the steps on the *Apply now* page to complete your programme application.

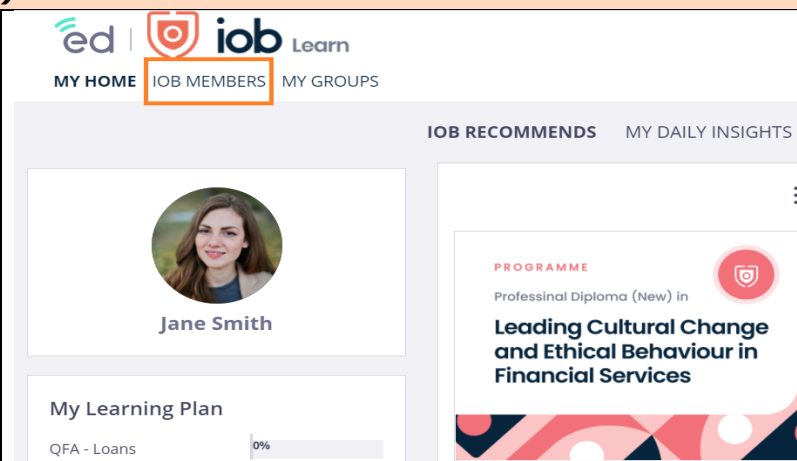


- Once your application is approved, you will be sent a link where you can register for your programme modules.
- You will now have to complete the “enrol now” process and screens that appear to register for your modules.
- The screenshot provided here is to give an example in terms of where the *Enrol now* button will appear. You will need to be logged in, go to your relevant programme page and complete the *Enrol now* steps.



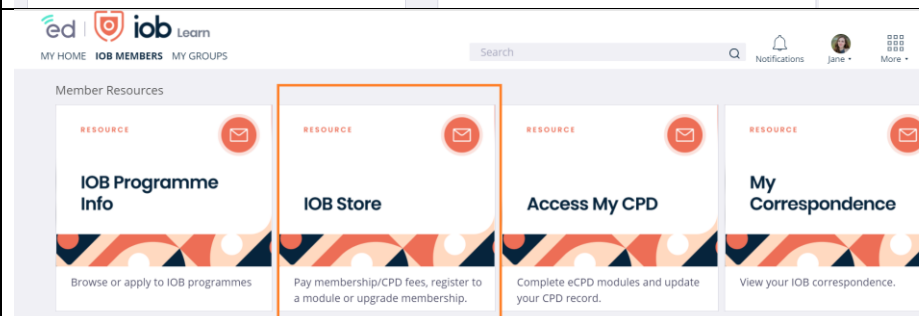
Paying membership fees (including designation fee)

- Click on IOB Members



The screenshot shows the IOB Members page. At the top, there are navigation tabs: MY HOME, IOB MEMBERS (highlighted with an orange box), and MY GROUPS. Below the tabs, there are two main sections: IOB RECOMMENDS and MY DAILY INSIGHTS. The IOB RECOMMENDS section features a profile card for Jane Smith and a 'My Learning Plan' section showing 'QFA - Loans' with a 0% progress bar. The MY DAILY INSIGHTS section displays a 'PROGRAMME' card for 'Professional Diploma (New) in Leading Cultural Change and Ethical Behaviour in Financial Services'.

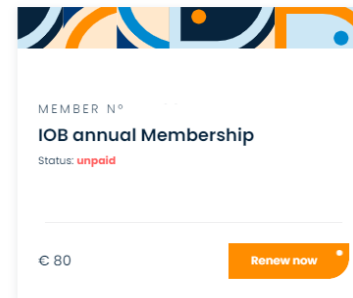
- Click *IOB Store* card



The screenshot shows the 'Member Resources' section of the IOB Members page. It contains four resource cards: 'IOB Programme Info', 'IOB Store' (highlighted with an orange box), 'Access My CPD', and 'My Correspondence'. Each card has a red envelope icon in the top right corner. The 'IOB Store' card includes the text: 'Pay membership/CPD fees, register to a module or upgrade membership.'

- You will be redirected to the IOB Store where you can choose to renew your fees by selecting *Renew now* underneath the relevant fee(s)

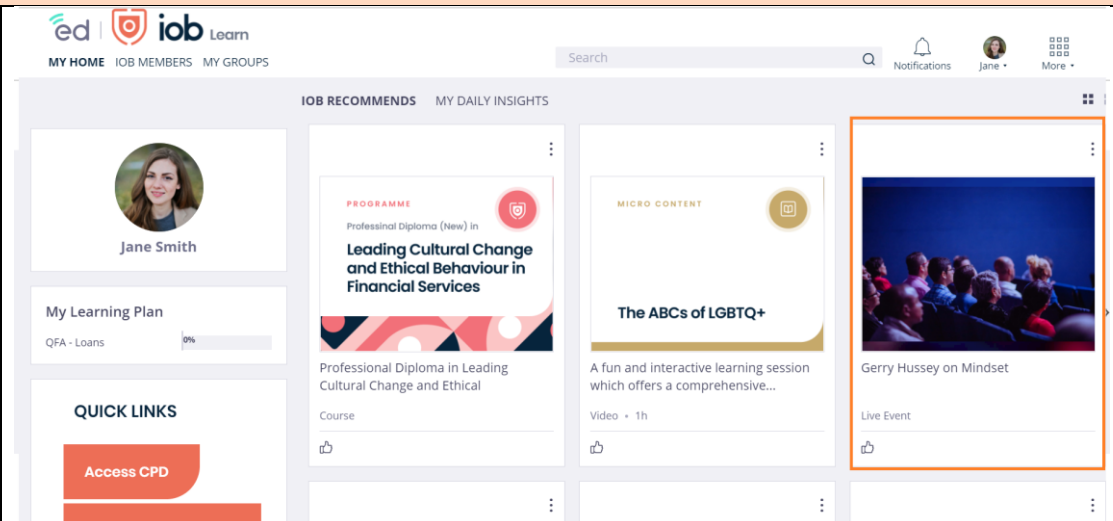
Shopping



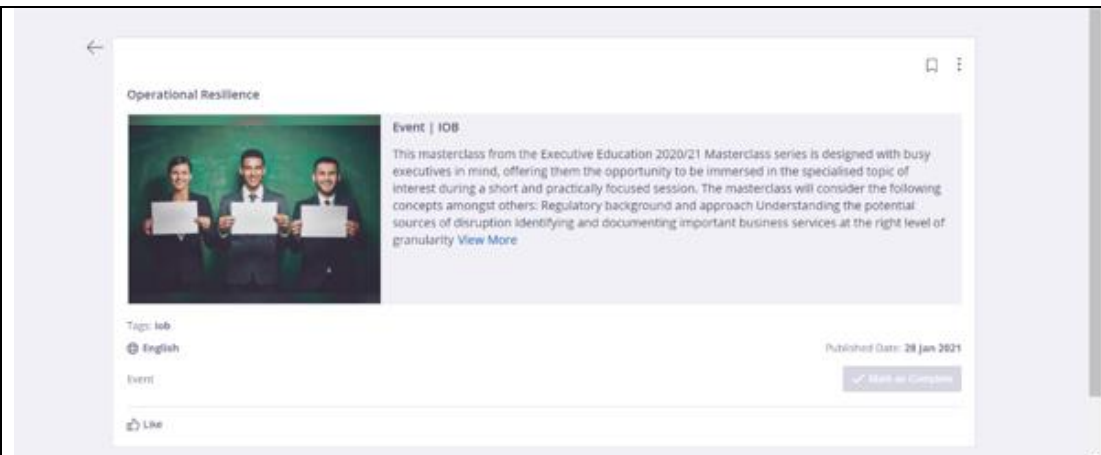
Registering for Events

Details of upcoming events are available on www.iob.ie/events as well as on IOB Learn in the *IOB Recommends* area or Events Content Channel.

To register for event when in IOB Learn you:

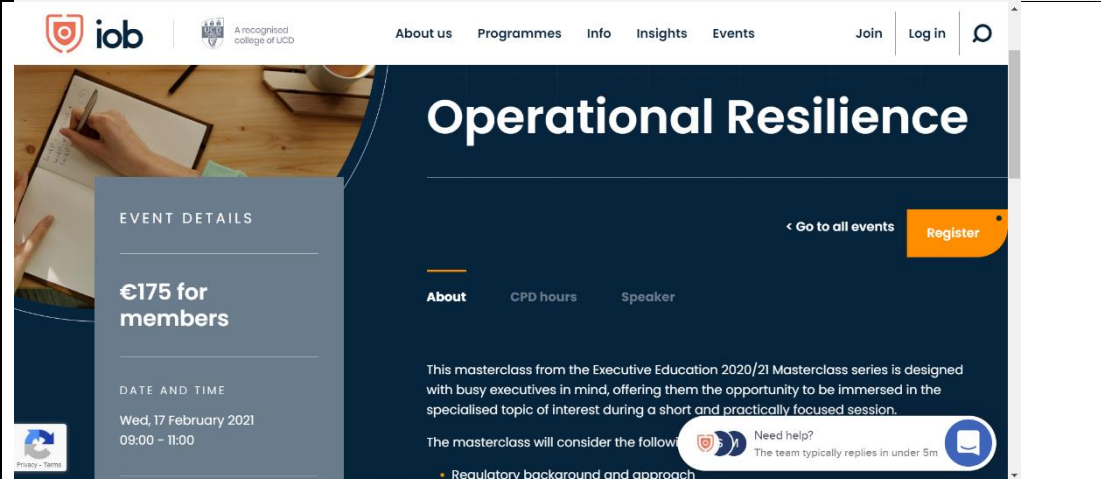


- Click the card for the event that you are interested in
- Click *View more*



- You will be redirected to the event page on the website
- Click *Register* and follow registration steps to register for the event.

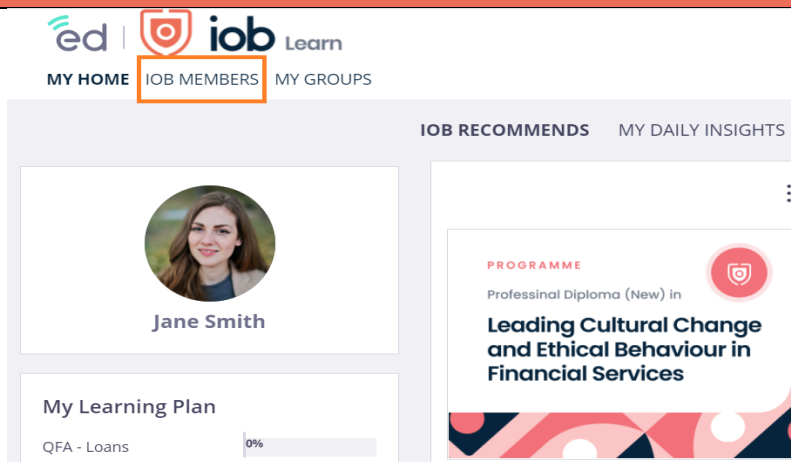
Online events are held on Zoom and details on how to join will be sent closer to the event date.



Viewing and updating your details

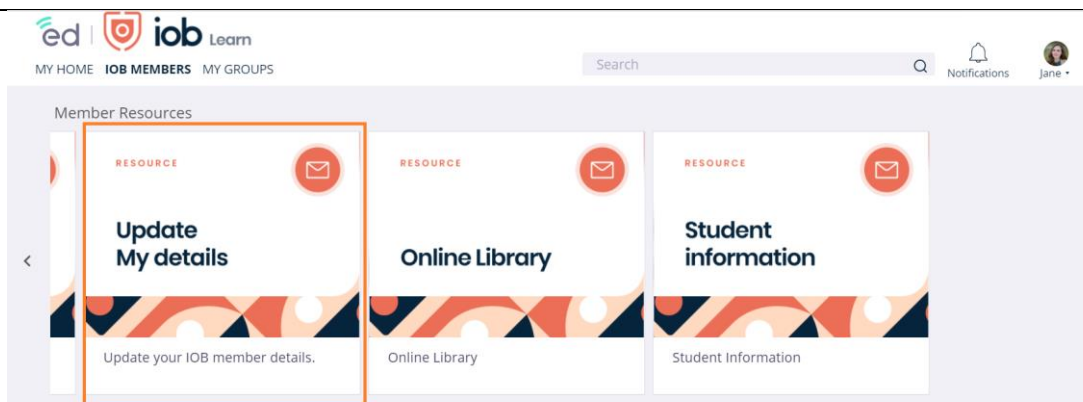
To change your that we hold on record for you:

- Click on *IOB Members*



The screenshot shows the iob Learn dashboard. The top navigation bar includes 'MY HOME', 'IOB MEMBERS' (highlighted with an orange box), and 'MY GROUPS'. Below this, the 'IOB RECOMMENDS' and 'MY DAILY INSIGHTS' sections are visible. The main content area features a profile card for Jane Smith, a 'My Learning Plan' section showing 'QFA - Loans' at 0%, and a 'PROGRAMME' card for 'Professional Diploma (New) in Leading Cultural Change and Ethical Behaviour in Financial Services'.

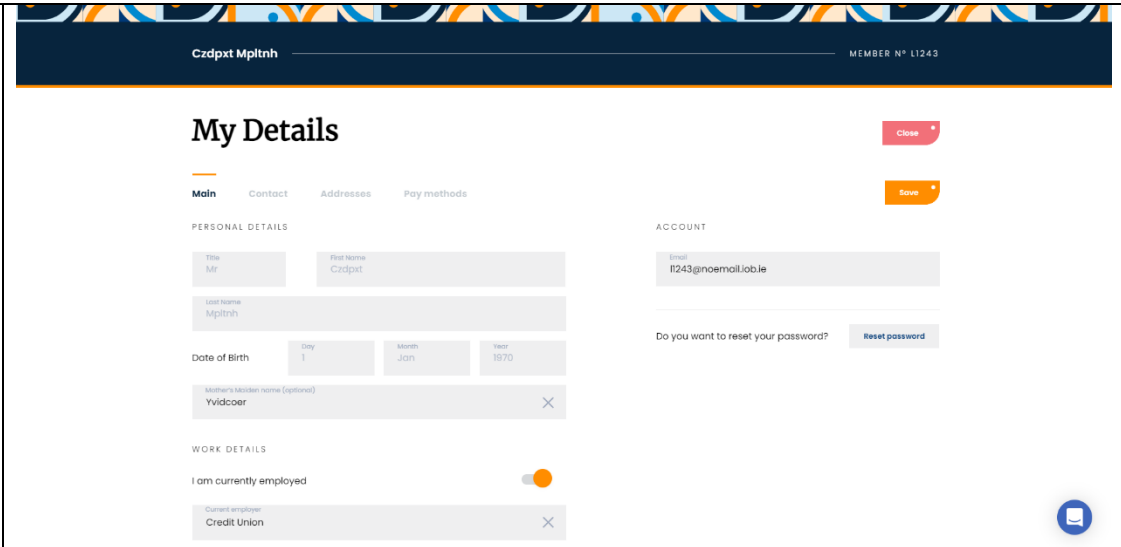
- Click *Update My Details* card in the Member Resources section



The screenshot shows the iob Learn dashboard with the 'Member Resources' section. The top navigation bar includes 'MY HOME', 'IOB MEMBERS' (highlighted with an orange box), and 'MY GROUPS'. A search bar, notifications bell, and user profile 'Jane' are also present. The 'Member Resources' section displays three cards: 'Update My details' (highlighted with an orange box), 'Online Library', and 'Student information'. Each card has a red envelope icon and a description at the bottom.

- You will be redirected to the My Details page
- Edit your details and click Save

Some details like your name cannot be changed online and you need to contact us directly.



Czdpjt Mpltnh MEMBER N° L1243

My Details

Close

Save

Main Contact Addresses Pay methods

PERSONAL DETAILS

Title Mr First Name Czdpjt

Last Name Mpltnh

Date of Birth Day 1 Month Jan Year 1970

Member's Access Name (optional) Yvidcoer

WORK DETAILS

I am currently employed

Current employer Credit Union

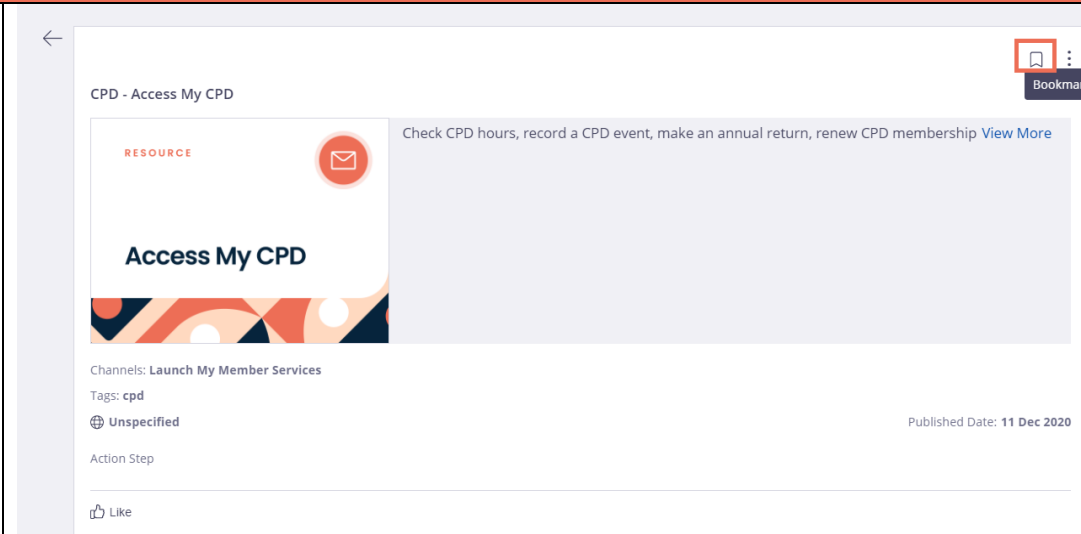
ACCOUNT

Email l1243@noemail.iob.ie

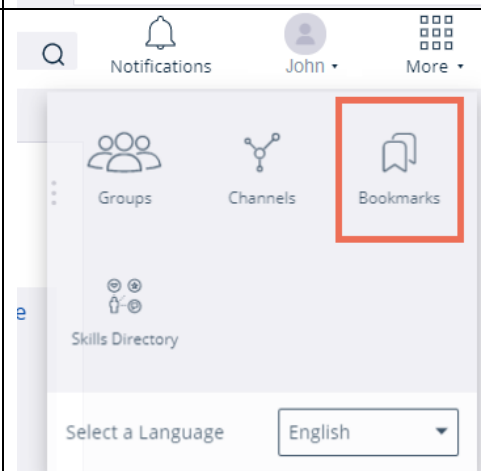
Do you want to reset your password? Reset password

Bookmarking

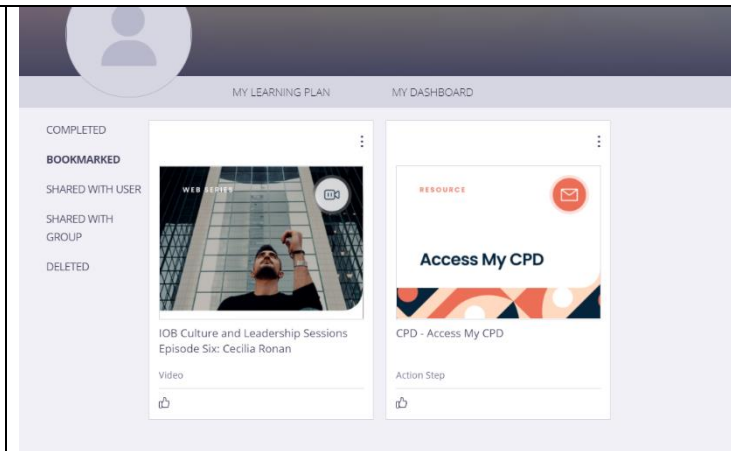
You can bookmark content and sections of IOB Learn. To do so you will need to click on the content or area card for example CPD under Member Resource and click on the bookmark



To easily access the bookmarked items you click on More icon and select Bookmarks



All your bookmarks will then appear together on one page



IOB Learn App

The desktop features are now available on the app

Please note that while the screenshots below are from an iPhone, the screens will look similar on Android phones

Downloading the app

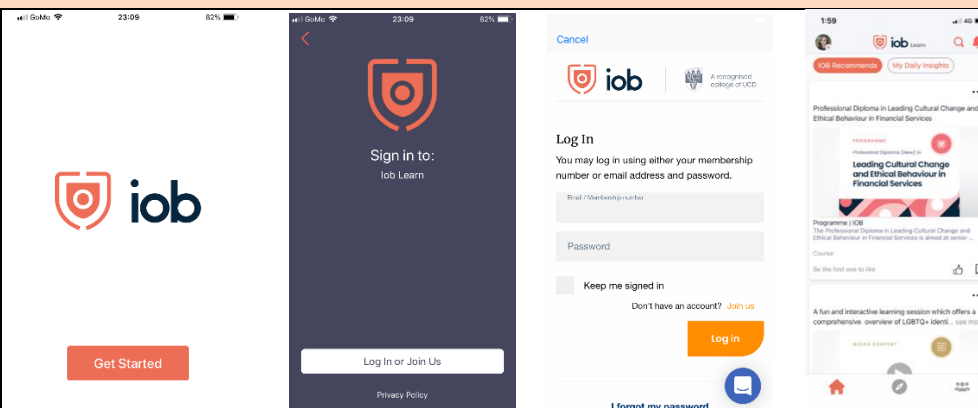
- Go to your App store or click on one of the following depending on your device:
 - [Apple App Store](#)
 - [Google Play Store](#)
- Search IOB Learn (above links will bring you directly to the app) and click on the app
- Click Install

Logging in and homepage

- Once you open the app click on Get Started
- Click on Login or Join us button
- Enter membership number/email and password
- Click on Log in

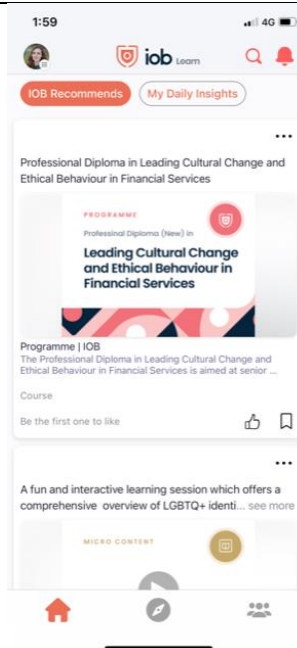
If you have not completed the onboarding process (see *Logging in and onboarding* section at the start of this user guide) you will need to follow the onboarding steps otherwise you will be brought to the app homepage

IOB Recommends, My Daily Insights and IOB Members (Member Resources and IOB Content Channels) will contain same content as on the desktop version. For

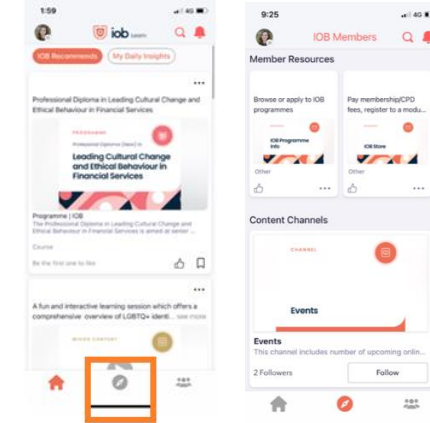


a little bit more detail on what is in each section
please see pages 4 and 5 of this guide.

Home icon will bring you to the homepage of the app

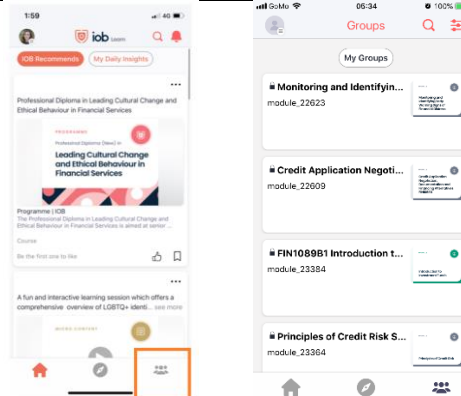


Compass icon represents IOB Members section where you can locate member resources and the IOB Content channels



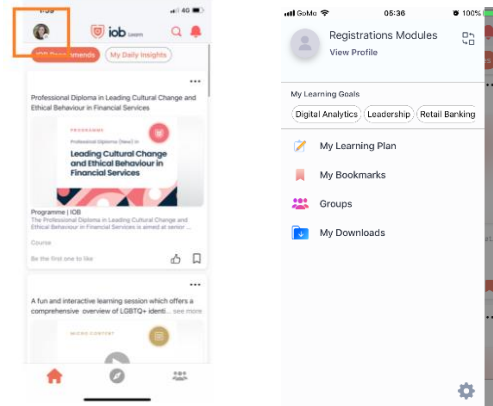
People icon represents Groups and this is one of the areas from where you can access your module material.

See Accessing module material section below for further step-by-step guide on how to access the material



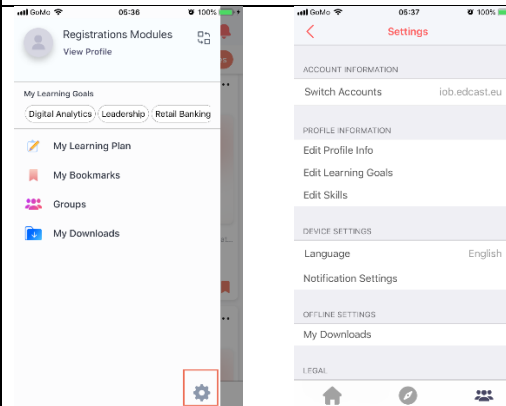
Under your profile icon you can view:

- Your profile
- Your Learning Goals/Areas of interest
- Your learning plan (including module material)
- Bookmarks
- Groups
- Downloads
- Settings (cog wheel icon)




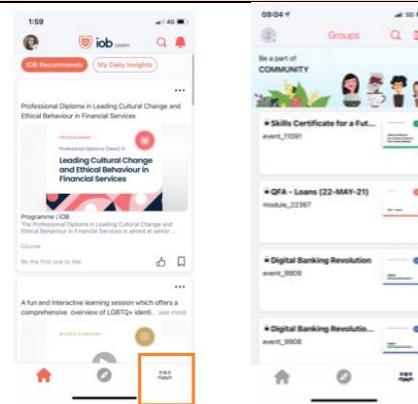
Under the settings in your profile you can:

- Log out
- Edit your profile info (profile and cover photo, bio, job role and skills)
- Edit Learning goals/areas of interest and skills
- Select Language
- Set up notifications (this feature is not currently in use)
- Manage downloads settings

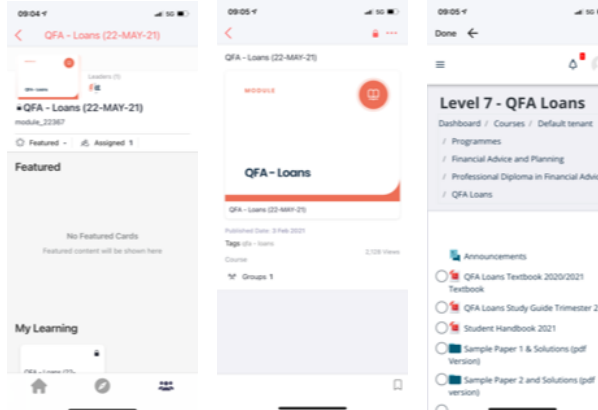


Accessing module material

- Click on people icon which represents groups
- List of all your learning will appear
 - If they do not appear select the filter icon  and select My Groups

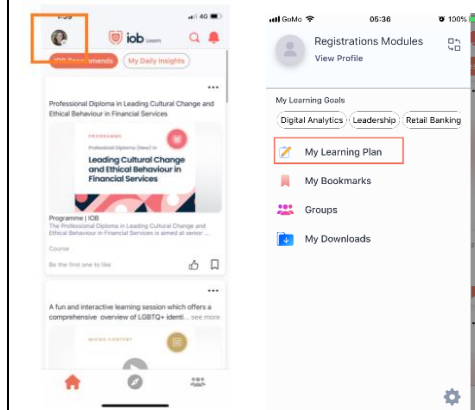


- Click on the module you wish to view
- Under My Learning click on the card
- Click on the image and you will then be brought to the module content

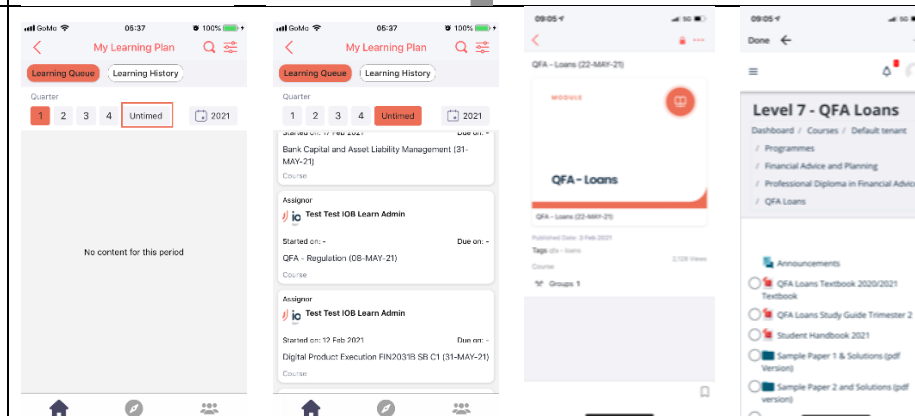


Another way to access module content is through learning plan

- Click on profile icon
- Click on My Learning Plan

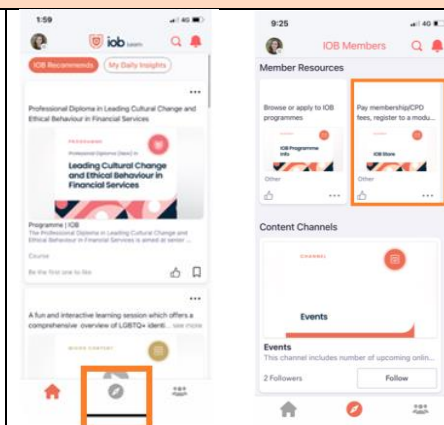


- Click on Untimed
- Click on module you wish to view
- Click on the image and you will then be brought to the module content

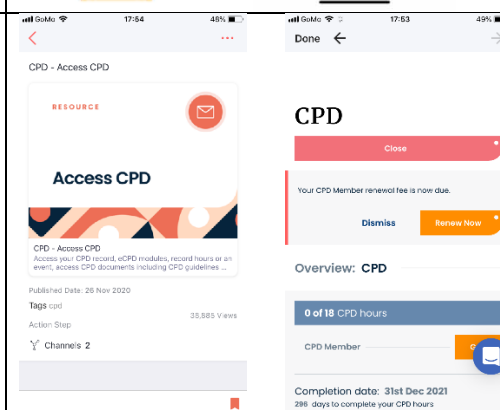


Accessing CPD/designation resources

- Click on the compass icon
- In the Member Resources section click on on the Access CPD card



- Click on the image
- Click on Go against the designation you wish to view and you will be brought to the CPD environment where you can record and complete CPD hour

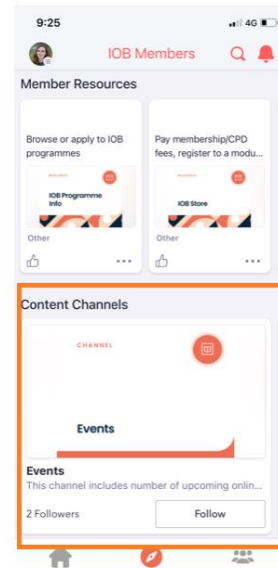


Accessing micro content

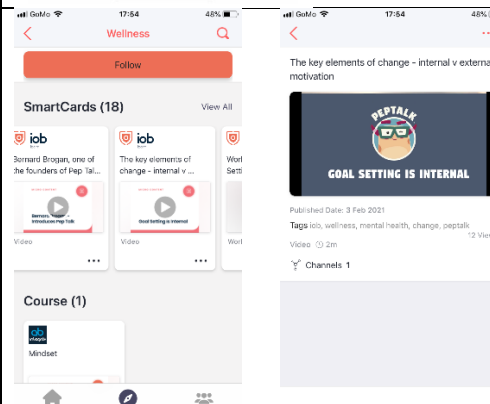
- Click on compass icon which represents IOB Members

Similarly to the desktop here you will find Member Resources on the top row and IOB Content Channels on the second row.

To browse the areas/topics you will need to scroll left and right



- Click on a topic, for example Wellness
- Here you will see content represented in cards
- Click on card you wish to view
- If content is
 - a video it will play the video
 - a pdf, article or course it will have a link to content



Logging out

- Click on profile icon
- Click on cog wheel
- Click on Logout which is at the bottom of the screen

