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IOB Learn

User Guide

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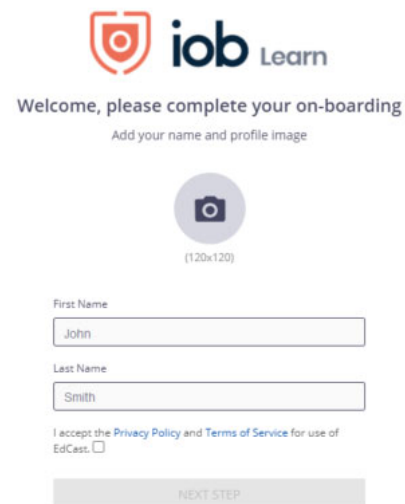
Logging in, onboarding and homepage

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*

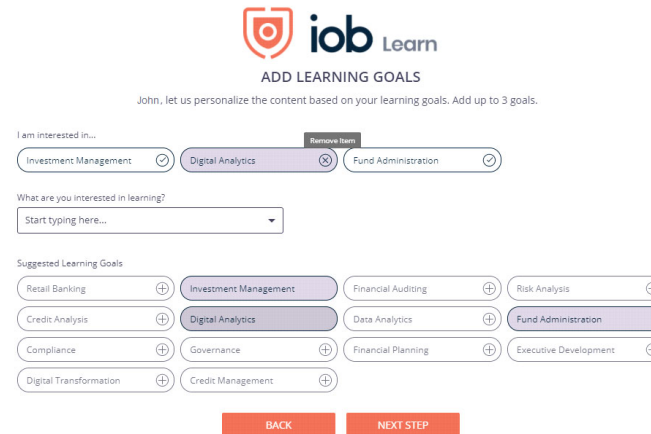
When logging into IOB Learn for the **first time** you will need to go through the onboarding process once you are logged in as follows:


- 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, the IOB Learn logo is displayed. Below it, the text 'Welcome, please complete your on-boarding' is shown, 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, there 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 for 'I accept the Privacy Policy and Terms of Service for use of EdCast.' and a 'NEXT STEP' button.

- 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*




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?

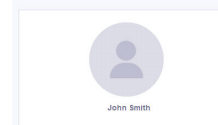
Start typing here...

BACK

SKIP

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

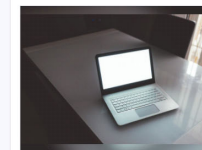
FEATURED RECOMMENDED MEMBER RESOURCES



My Learning Plan

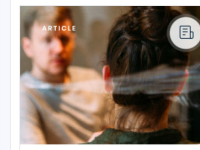
Your learning plan is empty, assigned content will show here.

Application closing date for level 8 & 9 programmes for Spring trimester (Feb - May 2021) is 29 January.



UAT Conducting Financial Crime Investigation Dublin

Event



Professional Certificate in Lending to Professionals, Self-Employed...

Article



2 Likes



IOB Culture and Leadership Sessions Episode Five: Jane Howard

Video



2 Likes

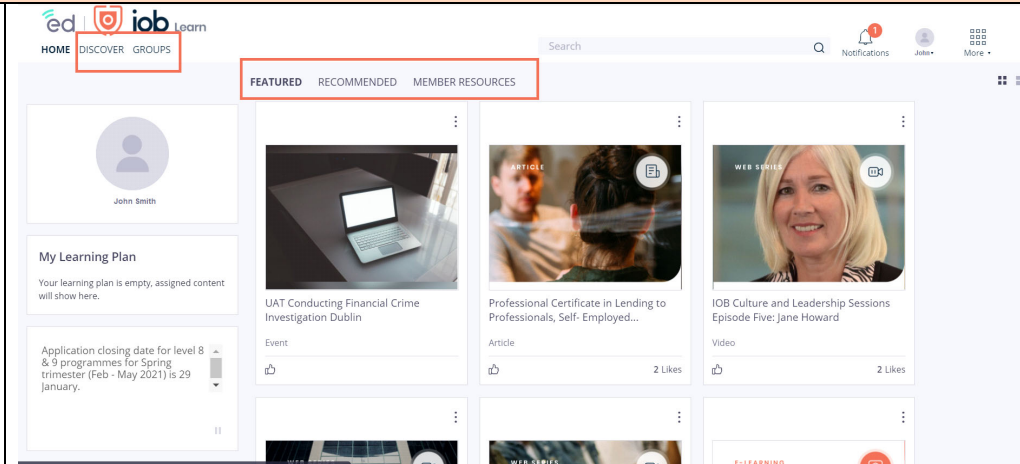
Homepage

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 *Featured*, *Recommended* and *Member Resources*.

You will also see two further tabs beside **Home** - *Discover* and *Groups* which are explained in detail later on in the guide.



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

You will find a welcome to IOB Learn, IOB Learn User Guide and FAQs here too.

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

Recommendations are personalised to each member and will add to your continuous learning.

In *Member resources* you can access administrative tools such as your CPD resources (if you are an active designate), correspondence, your details, the shopping cart and student information.

Discover will contain:

1. Programme Areas containing information on our qualifications



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2. Our new micro learning content – this comprises videos, articles and podcasts created or sourced by IOB
3. Trending content based on the interests you've chosen at the sign up stage and this will contain content from open source sites

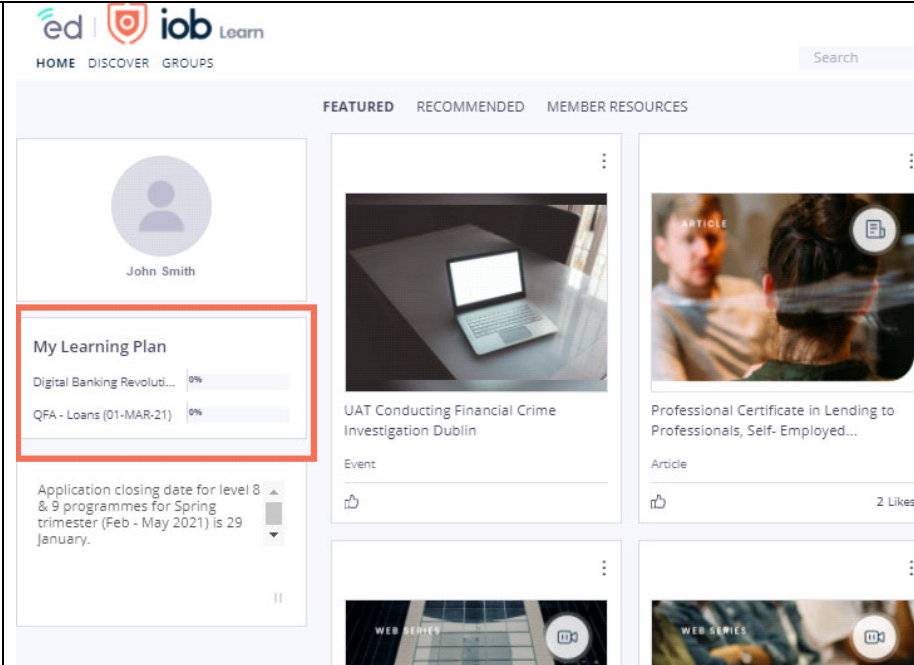
Groups is a learning community to which you are assigned and into which access to certain of your learning (modules, short course) will be placed.

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.



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

QFA - Loans (01-MAR-21)

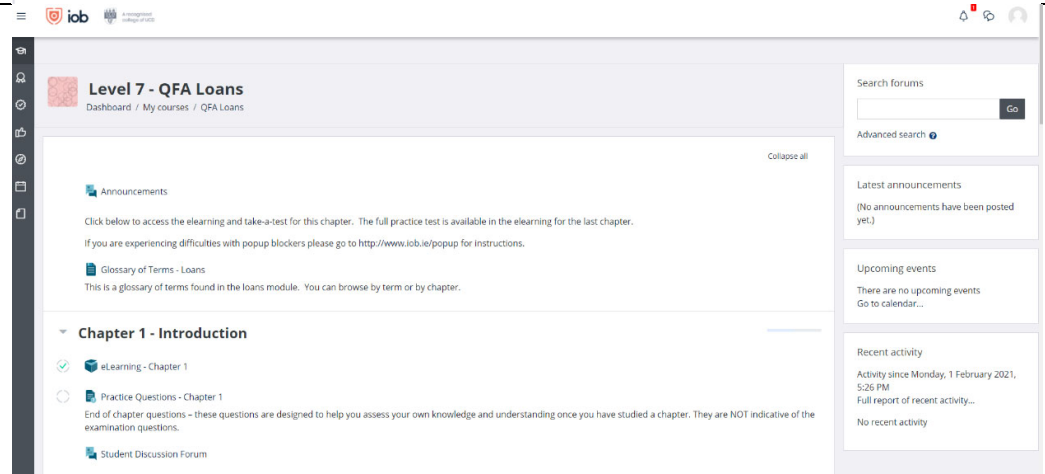


QFA - Loans (01-MAR-21)
[View More](#)

Unspecified • Private

Published Date: 20 Jan 2021

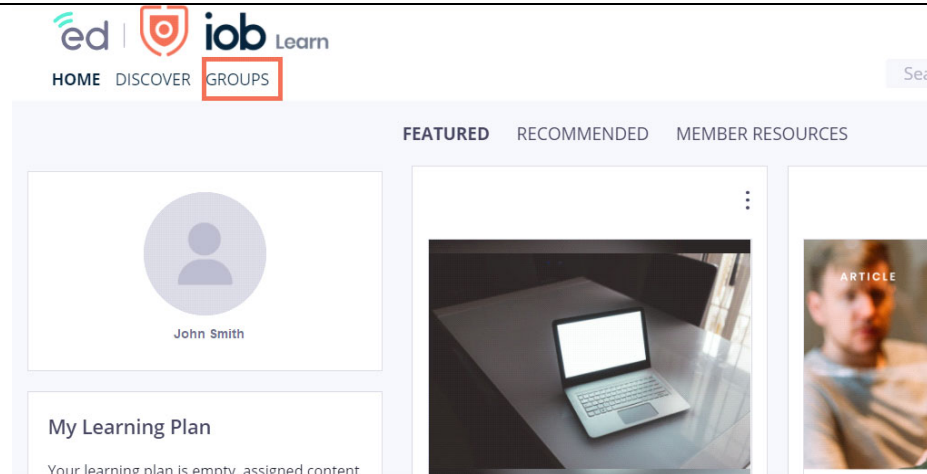
- This will then bring you to the module content that contains all the materials for your module including, study guide, readings, associated texts and MCQ tests
- Welcome email sent at the start of Trimester will include details on material available here



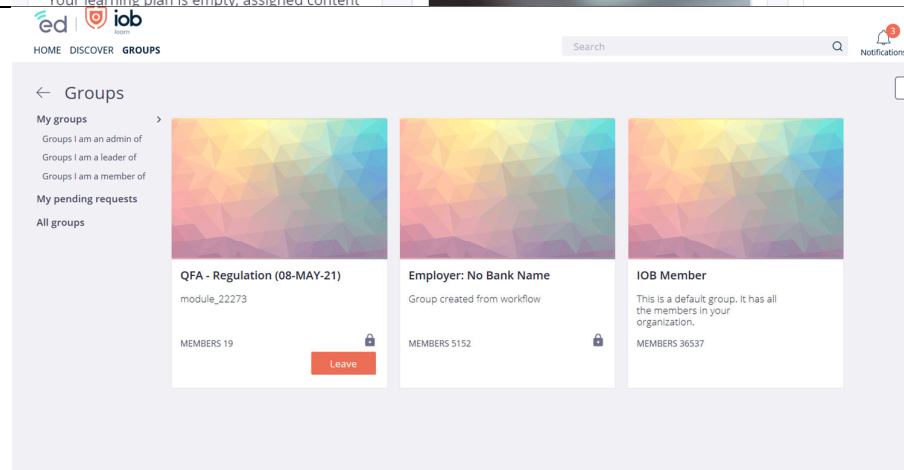
The screenshot displays the iob LMS interface for the 'Level 7 - QFA Loans' module. The dashboard includes a sidebar with navigation options like Home, My courses, and QFA Loans. The main content area features an 'Announcements' section with a message about accessing eLearning and a 'Glossary of Terms - Loans' section. Below these is the 'Chapter 1 - Introduction' section, which includes links to 'eLearning - Chapter 1', 'Practice Questions - Chapter 1', and 'Student Discussion Forum'. The right sidebar contains a search bar, a section for 'Latest announcements' (noting no announcements have been posted yet), 'Upcoming events' (noting no upcoming events), and 'Recent activity' (showing activity since Monday, 1 February 2021, 5:26 PM).

Second way is as follows:

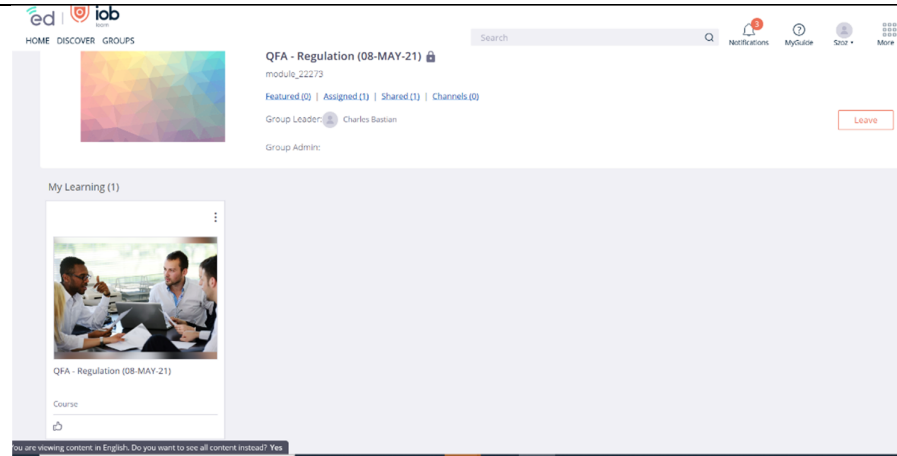
- Click *Groups*



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

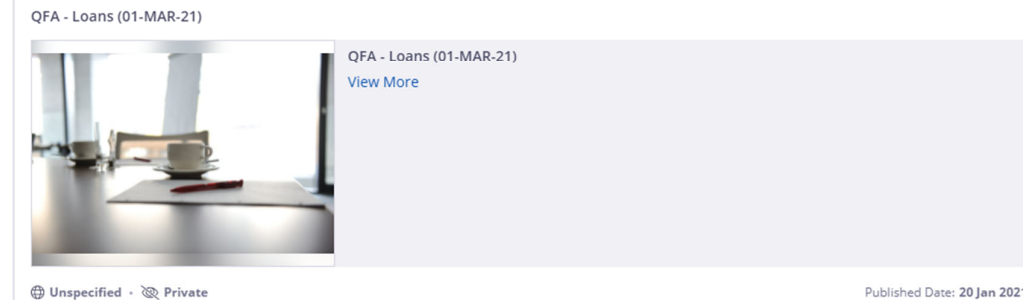


- Click on to the group card that shows your module name and all the cards linked to this module will appear



The screenshot shows the iob platform interface. At the top, there's a navigation bar with 'HOME', 'DISCOVER', and 'GROUPS'. A search bar is on the right. Below the navigation bar, there's a group card for 'QFA - Regulation (08-MAY-21)' with a colorful abstract image. The card displays 'module_22273', 'Featured (0)', 'Assigned (1)', 'Shared (1)', and 'Channels (0)'. It also lists 'Group Leader: Charles Bastian' and 'Group Admin:'. A 'Leave' button is visible. Below the group card, there's a 'My Learning (1)' section showing a thumbnail of three people in a meeting, with the title 'QFA - Regulation (08-MAY-21)' and a 'Course' label.

- 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.

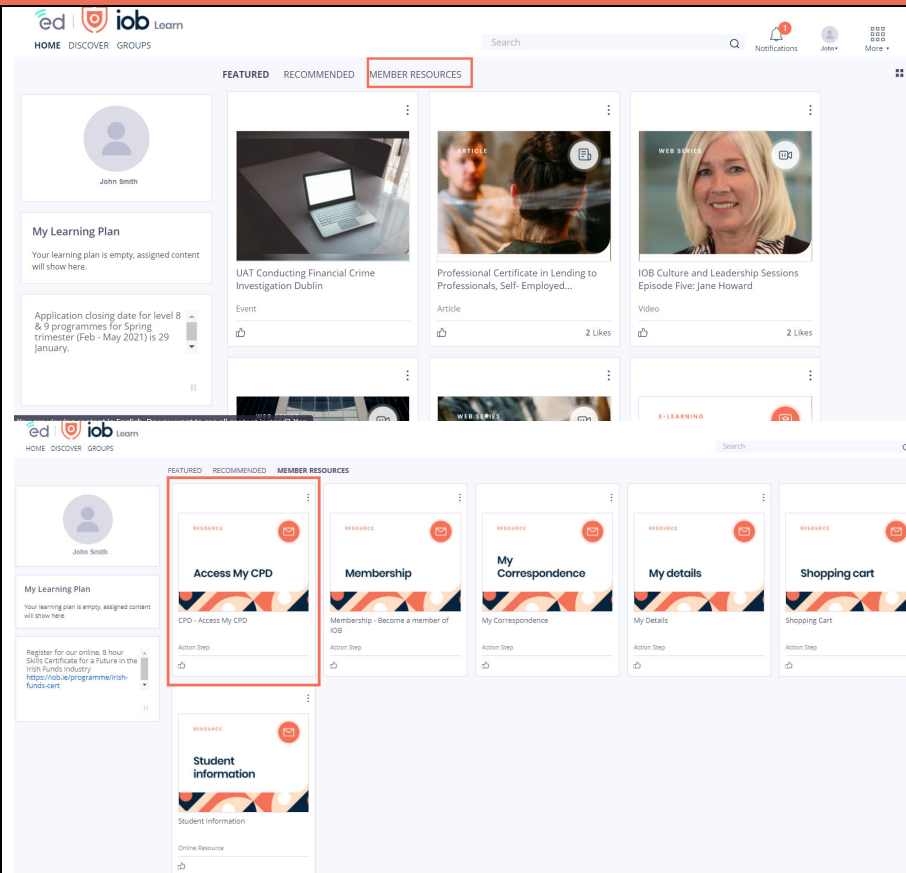


The screenshot shows the iob platform interface for a specific module. The title is 'QFA - Loans (01-MAR-21)'. Below the title is a thumbnail image of a desk with a laptop, a cup of coffee, and a pen. To the right of the thumbnail is a 'View More' link. At the bottom, there's a status bar showing 'Unspecified' and 'Private' icons, and a 'Published Date: 20 Jan 2021'.

Accessing CPD/designation resources

If you wish to access your CPD resources:

- Click on *Member resources*
- Click *View my CPD card*
- Click *View more* and you will be redirected to your CPD overview



The screenshot displays the iob Learn platform interface. The top navigation bar includes 'HOME', 'DISCOVER', and 'GROUPS'. The main content area is divided into three tabs: 'FEATURED', 'RECOMMENDED', and 'MEMBER RESOURCES'. The 'MEMBER RESOURCES' tab is selected and highlighted with a red box. Below the tabs, there are several resource cards. The 'Access My CPD' card is highlighted with a red box. Other visible cards include 'Membership', 'My Correspondence', 'My details', 'Shopping cart', and 'Student information'. The left sidebar shows a user profile for 'John Smith', a 'My Learning Plan' section, and a notification about the application closing date for level 8 & 9 programmes for Spring trimester (Feb - May 2021) is 29 January.

- 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

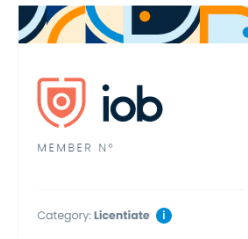
0 of 15 CPD hours

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



CPD: QFA

Close

My eCPD



1 HOUR - 80.0%

Consumer Credit

Use MOC, Penalties, Savings & Investments, Housing Costs, Consumer Credit

My hours

< 2021 >

	Request	Remaining
Total hours	15	0
Use MOC	1	0
Penalties	1	0

Annual Return

You must have recorded all of the registered events meeting all your CPD hours for 2021 in order to make an Annual Return.

The closing date for annual returns is 31 January 2022.

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

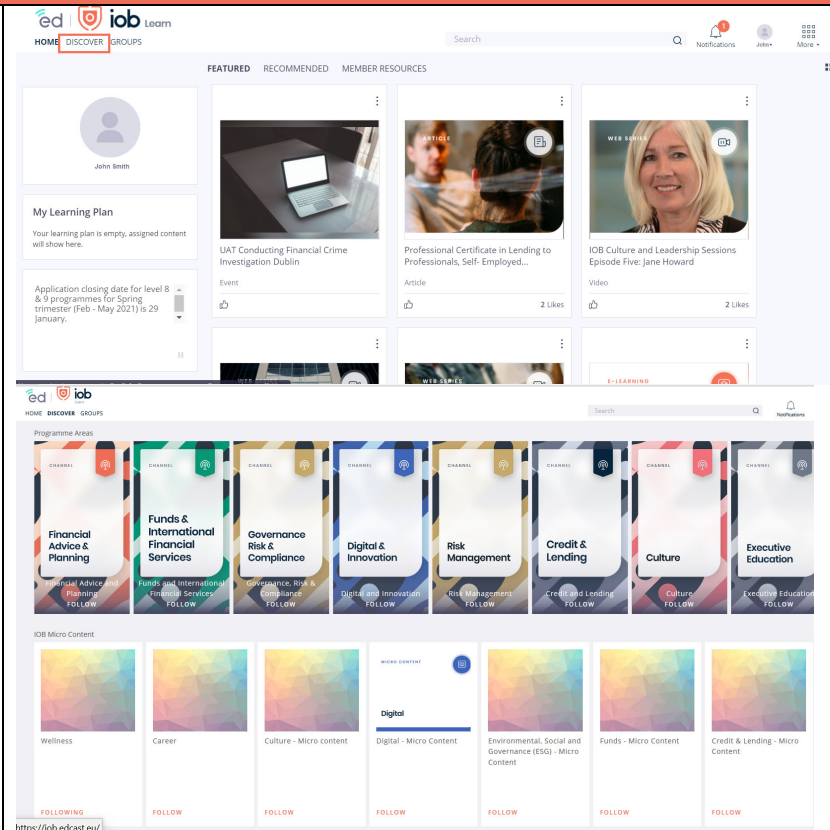
Subject	Requested	Recorded
Total hours	15	17



Accessing 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 *Discover*
- Here you will find IOB Programmes available on the top row of the screen and our new IOB Micro Content available on the second row
- Our micro content is 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

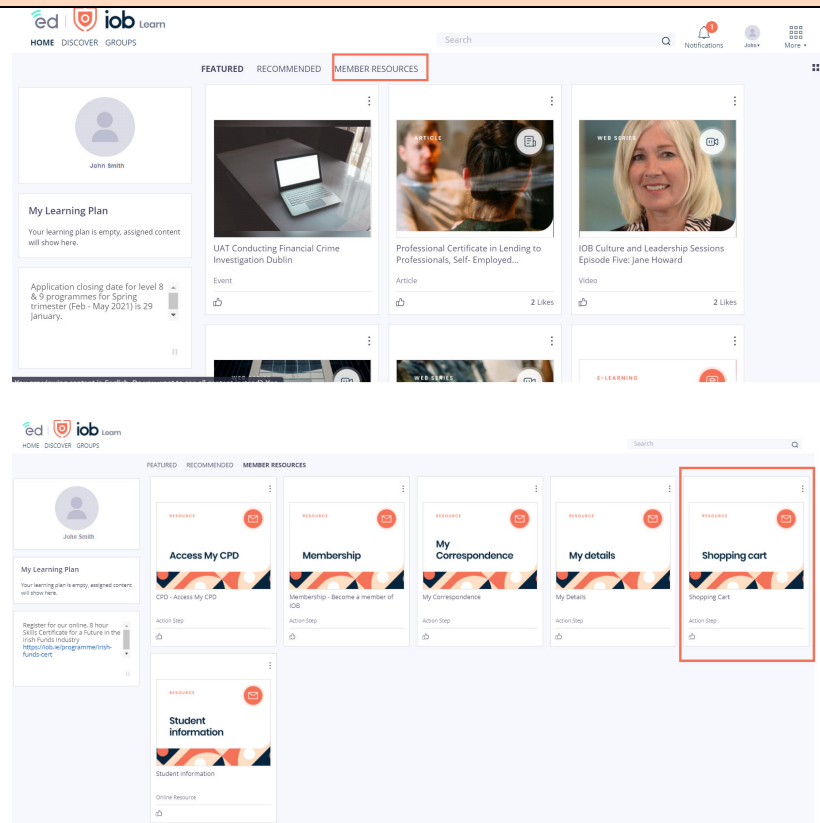


Shopping cart – access through IOB Learn

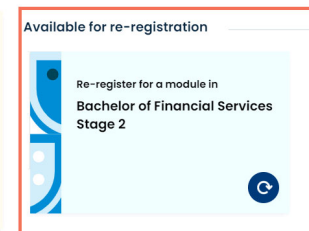
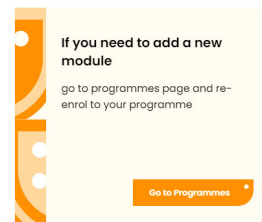
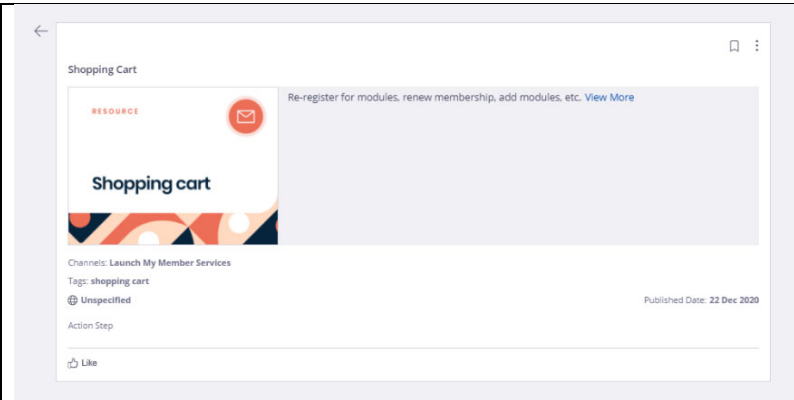
Programme enrolment and event registration can also be accessed directly through the website

Re-registering for a module

- Click on *Member Resources*
- Click *Shopping Cart* card

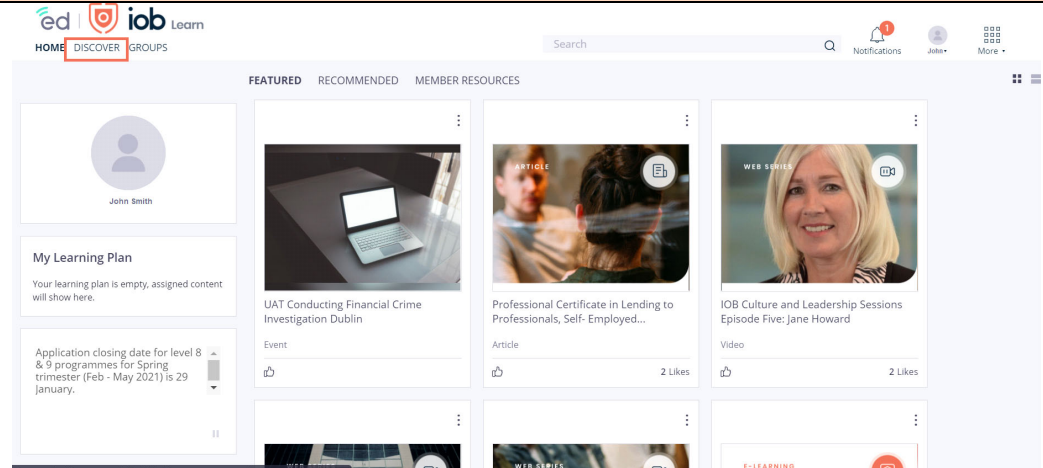


- Click *View more*
- You will be brought to the shopping cart where you click on the relevant card under *Available for re-registration* and follow the steps

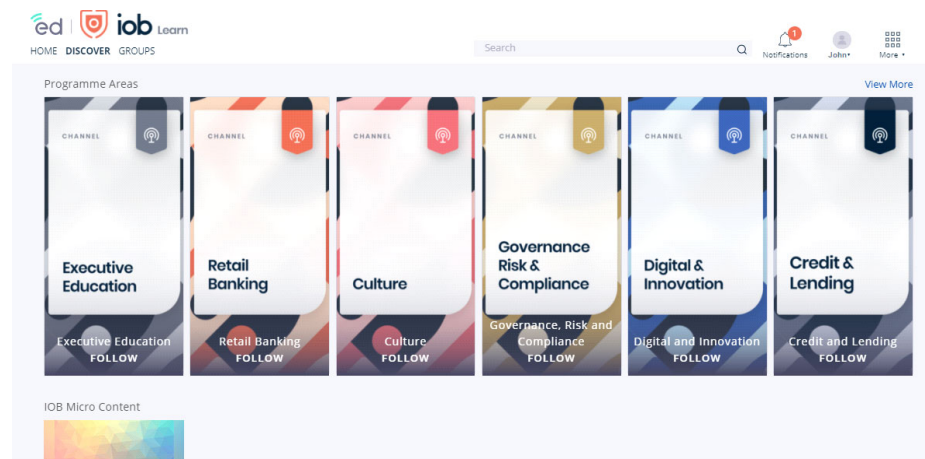


Applying and registering for a new programme

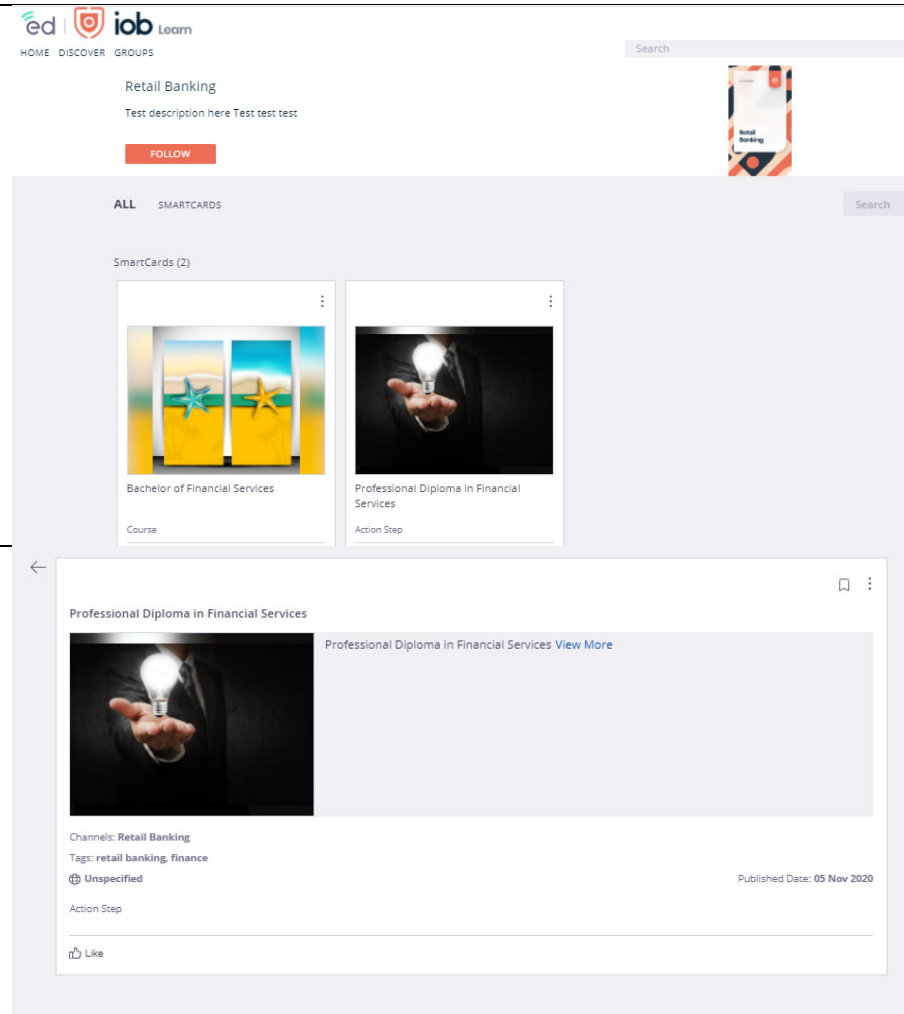
- Click on *Discover*



- Here you will see all the different programme areas
- Click on the programme area card that you are interested in (e.g., Retail Banking)



- Within the Retail Banking screen, you will see the programmes that relate to this area.
- Click on the programme card that you wish to apply for or register to e.g., Professional Diploma in Financial Services



The screenshot displays the iob Learn interface. At the top, there's a navigation bar with 'HOME', 'DISCOVER', and 'GROUPS'. Below this, the 'Retail Banking' section is highlighted, showing a 'Test description here Test test test' and a 'FOLLOW' button. A search bar is present in the top right. The main content area shows 'SmartCards (2)' with two cards: 'Bachelor of Financial Services' and 'Professional Diploma in Financial Services'. The 'Professional Diploma in Financial Services' card is selected, showing a detailed view with a lightbulb image, the title 'Professional Diploma in Financial Services', a 'View More' link, and metadata including 'Channels: Retail Banking', 'Tags: retail banking, finance', 'Unspecified', 'Action Step', and 'Published Date: 05 Nov 2020'.

- Click *View more*

- 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

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

8

[Go to all programmes](#)



Financial Services

RETAIL BANKING

[Express an interest](#)
[Apply now](#)

[Overview](#)
[Details](#)
[Requirements](#)
[Modules](#)

Awarding body

You're not alone.

Members have access to:

- The institute online library
- Download lecture notes, past exams and pilot exams
- Receive lecture and exam attendance notices
- Online CPD record
- Career resource centre

Apply

Complete your application.

You're about to apply for
Financial Services

[leave the process](#)

REQUIREMENTS


Select the entry requirements you wish to apply under.

I AM A HOLDER OF:

- 3 years' experience in a Retail Banking role, have completed a 30 ECTS Special Purpose Award/s at Level 7 NFQ and completed 1 of IOB's specialist Special Purpose Awards (min 10 ECTS) at Level 8 from IOB's suite of specialist programmes.

17 | Page

- 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.



7

< Go to all programmes

Financial Advice (QFA)

FINANCIAL ADVICE AND PLANNING

Express an interest Enrol now

Overview Details Requirements Modules

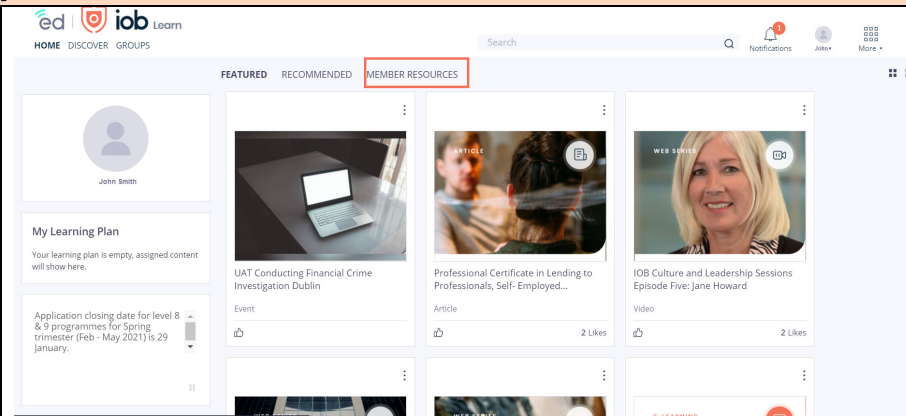
Awarding body

University College Dublin

Who is the programme for?

Paying membership fees (including designation fee)

- Click on *Member resources*



ed iob Learn

HOME DISCOVER GROUPS

Search

Notifications Jane+ More

FEATURED RECOMMENDED MEMBER RESOURCES

John Smith

My Learning Plan

Your learning plan is empty, assigned content will show here.

Application closing date for level 8 & 9 programmes for Spring trimester (Feb - May 2021) is 29 January.

UAT Conducting Financial Crime Investigation Dublin

Event

Professional Certificate in Lending to Professionals, Self-Employed...

Article

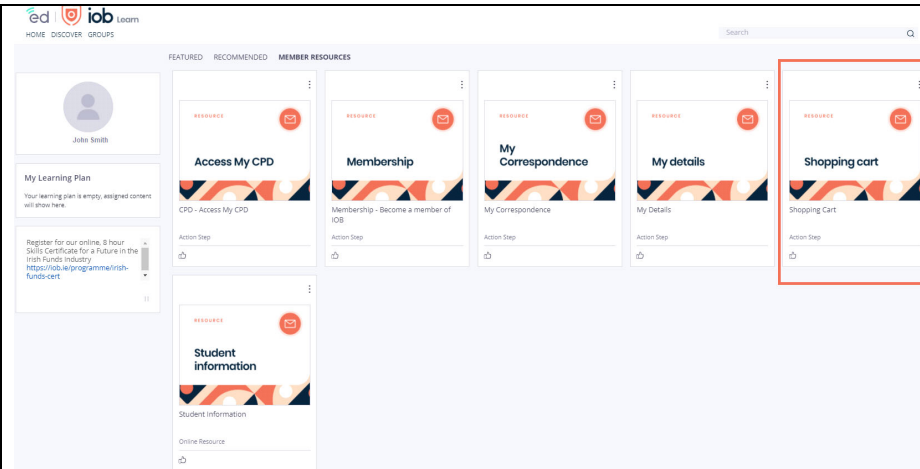
2 Likes

IOB Culture and Leadership Sessions Episode Five: Jane Howard

Video

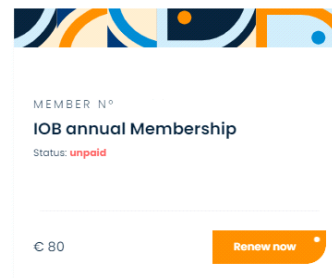
2 Likes

- Click *Shopping cart* card
- Within the card click on *View more*



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

Shopping

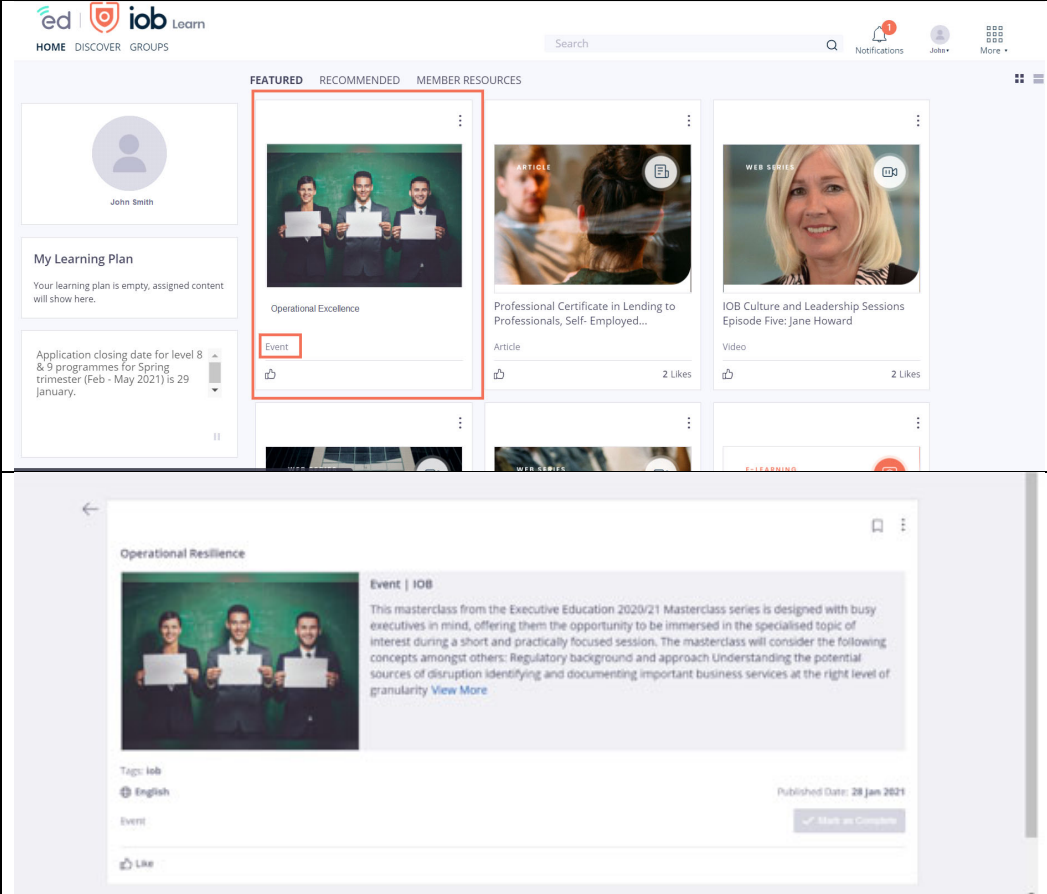


Registering for Events

Details of upcoming events are available on www.iob.ie/events as well as on IOB Learn in the *Featured* area.

To register for event when in IOB Learn you:

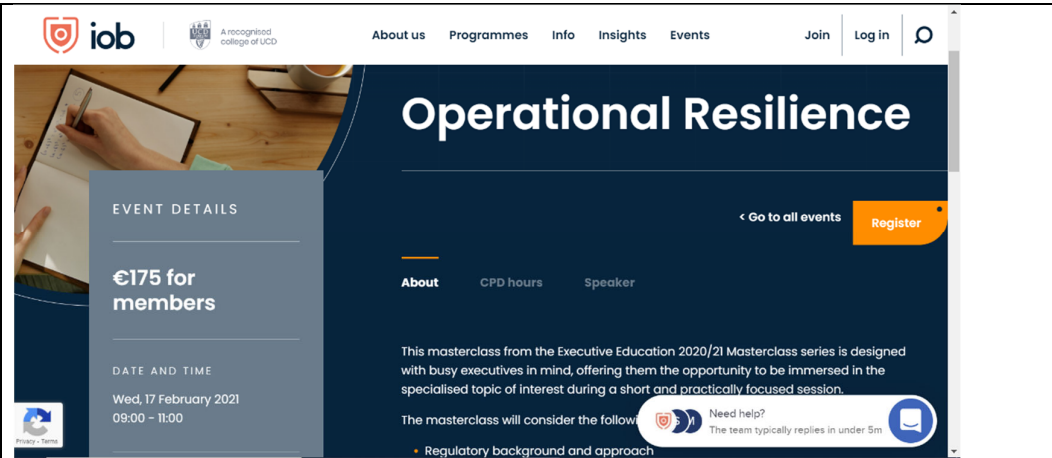
- Click the card for the event that you are interested in
- Click *View more*



The screenshot displays the IOB Learn platform interface. At the top, there's a navigation bar with 'HOME', 'DISCOVER', and 'GROUPS'. Below this, a 'FEATURED' section is visible, containing a grid of event cards. The first card, titled 'Operational Excellence', is highlighted with a red border. A red box also highlights the 'Event' label on this card. To the left of the grid, there's a user profile for 'John Smith' and a 'My Learning Plan' section. Below the grid, a detailed view of an event titled 'Operational Resilience' is shown. This view includes a description of the masterclass, tags for 'iob' and 'English', and a 'Published Date' of '28 Jan 2021'. A 'View More' link is also present.

- 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.

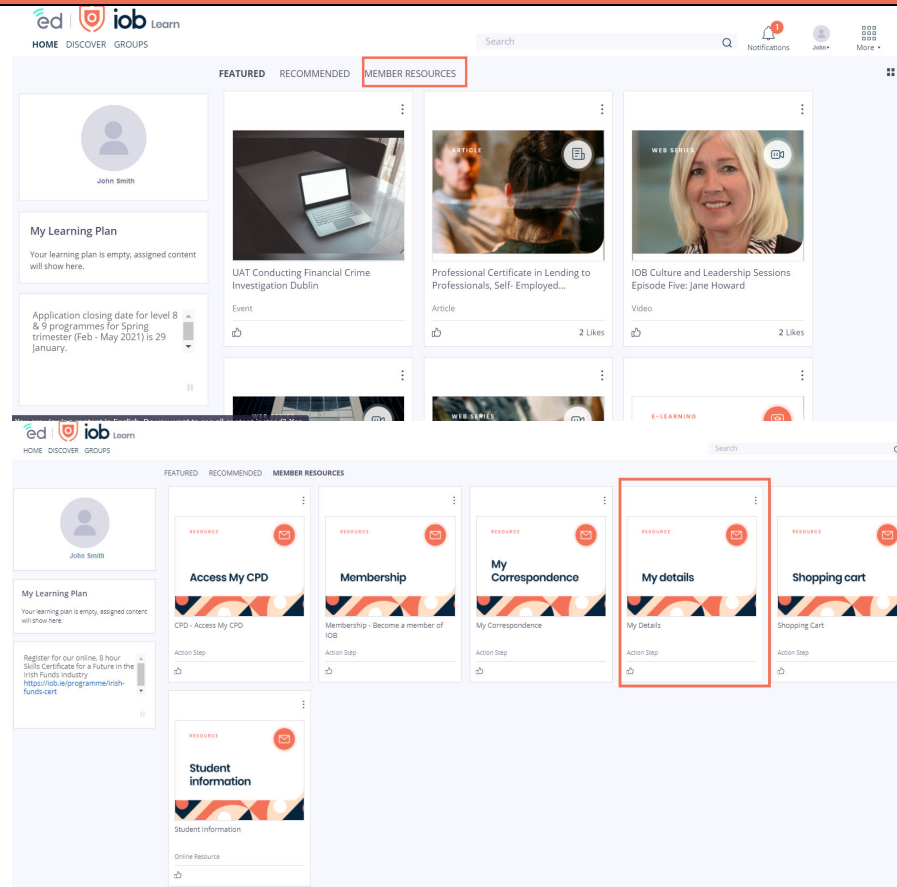


The screenshot shows the 'Operational Resilience' event page on the iob website. The page features a dark blue header with the iob logo and navigation links: About us, Programmes, Info, Insights, Events, Join, and Log in. A 'Register' button is prominently displayed in orange. The main content area includes a section for 'EVENT DETAILS' with the price '€175 for members' and the date and time 'Wed, 17 February 2021 09:00 - 11:00'. The event description states: 'This masterclass from the Executive Education 2020/21 Masterclass series is designed with busy executives in mind, offering them the opportunity to be immersed in the specialised topic of interest during a short and practically focused session. The masterclass will consider the following: • Regulatory background and approach'. A 'Need help?' chat bubble is visible in the bottom right corner.

Viewing and updating your details

To change your that we hold on record for you:

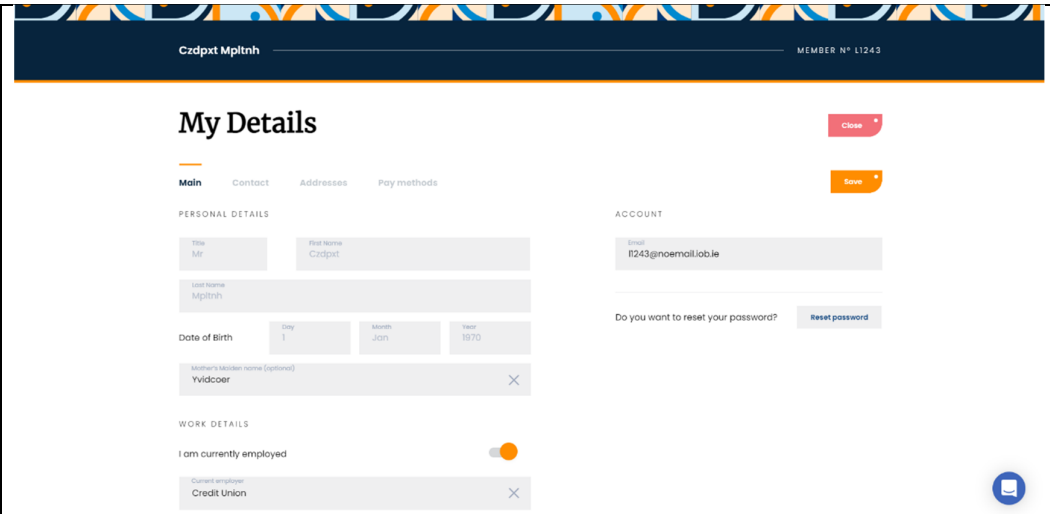
- Click on *Member Resources*
- Click *My Details* card
- Click View more within the card



The screenshot displays the iob Learn Member Resources page. The page is divided into two main sections. The top section shows a grid of featured content, including a user profile for John Smith, a learning plan, and various articles and videos. The bottom section shows a grid of member resources, including 'Access My CPD', 'Membership', 'My Correspondence', 'My details', and 'Shopping cart'. The 'My details' card is highlighted with a red border, indicating it is the target for the next step in the process.

- 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.



Czdpxt Mpltnh MEMBER N° L1243

My Details

[Close](#) [Save](#)

Main [Contact](#) [Addresses](#) [Pay methods](#)

PERSONAL DETAILS

Title: First name: Last name:

Date of Birth: Day: Month: Year:

Member's contact name (optional): [X](#)

WORK DETAILS

I am currently employed: ☒

Company employer: [X](#)

ACCOUNT

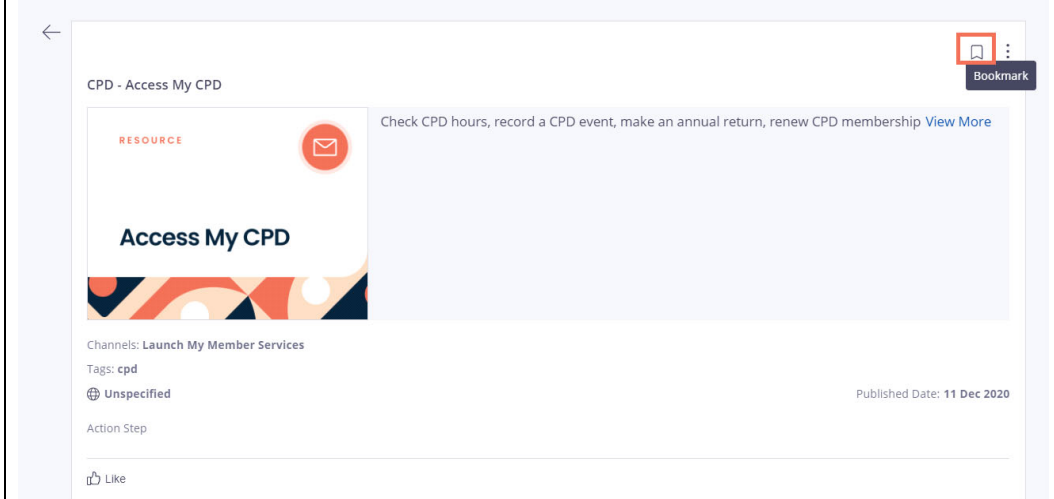
Email:

Do you want to reset your password? [Reset password](#)

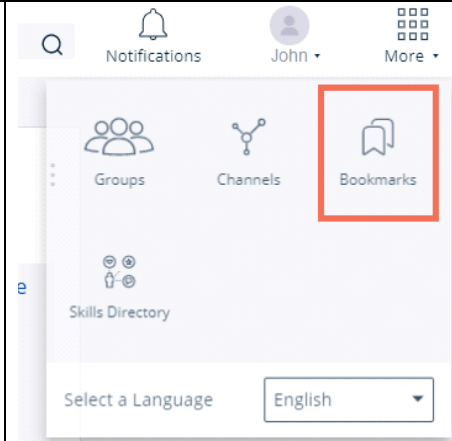
[Contact Us](#)

Bookmarking

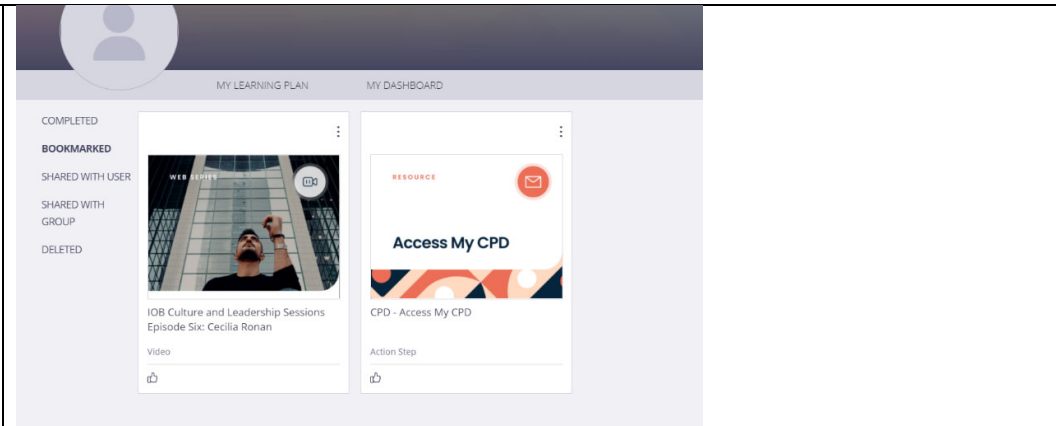
You can bookmark content and sections of IOB Learn. To do so you will need to click on the content or area card for example CPD under Member Resource and click on the bookmark



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

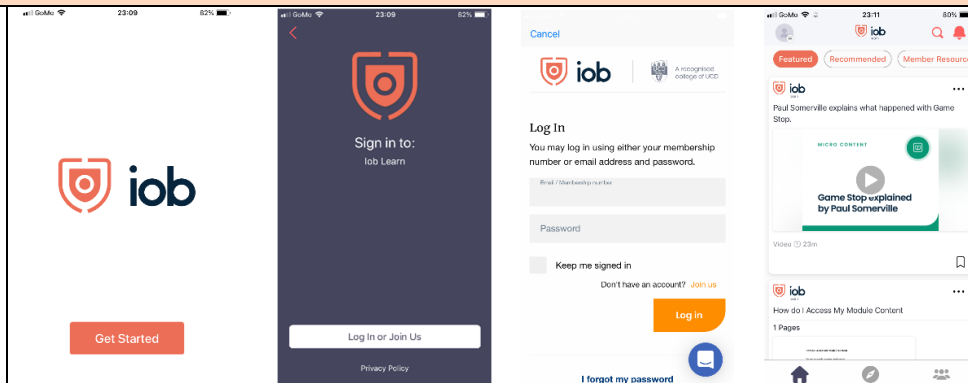
- Go to your App store or click on one of the following depending on your device:
 - [Apple App Store](#)
 - [Google Play Store](#)
- Search IOB Learn (above links will bring you directly to the app) and click on the app
- Click Install

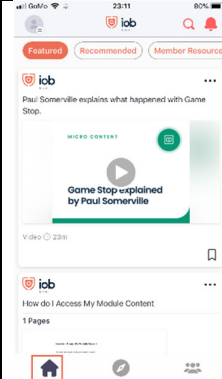
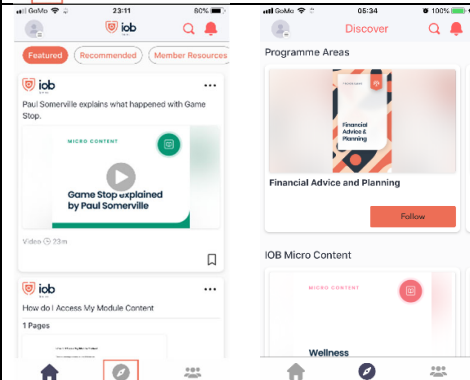
Logging in and homepage

- 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

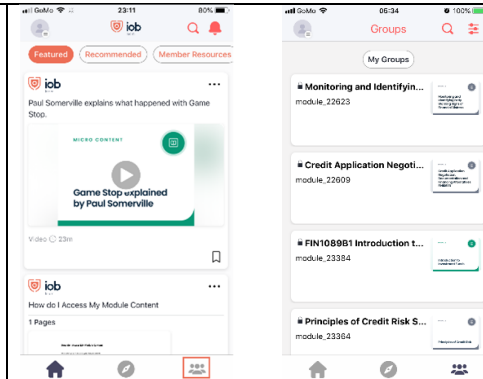
Featured, Recommended, Member Resources and Discover will contain same content as on the



<p>desktop version. For a little bit more detail on what is in each section please see pages 4 and 5 of this guide.</p>	
<p>Home icon will bring you to the homepage of the app</p>	
<p>Compass icon represents Discover section where you can locate micro content</p>	

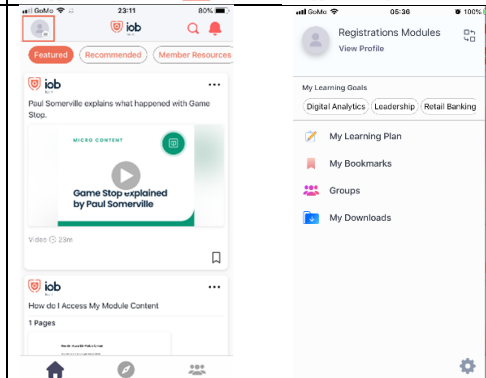
People icon represents Groups and this is one of the areas from where you can access your module material.

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



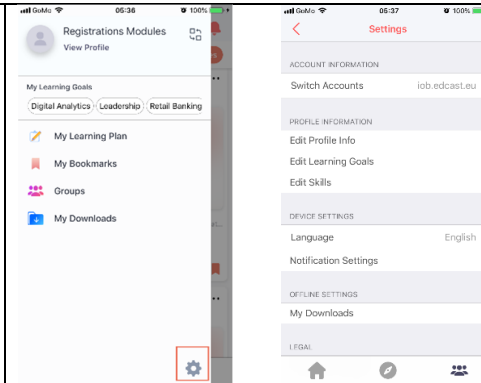
Under your profile icon you can view:

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




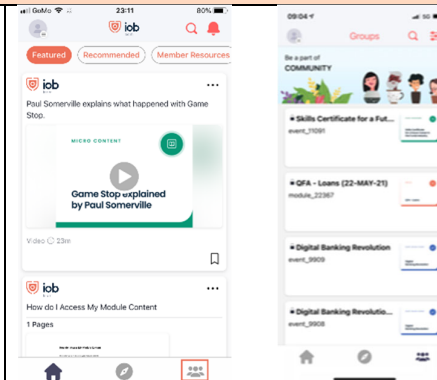
Under the settings in your profile you can:

- 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

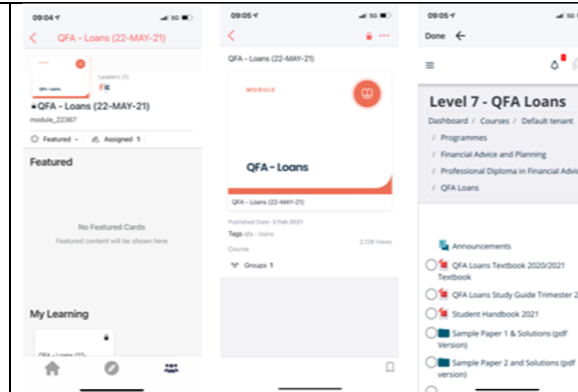


Accessing module material

- 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

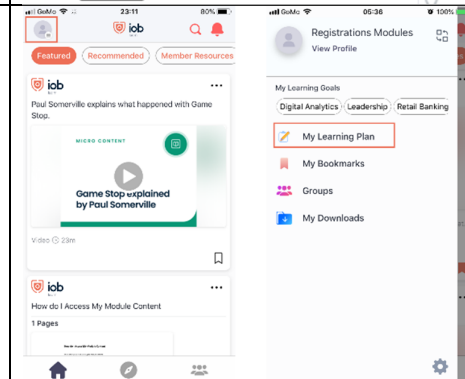


- Click on the module you wish to view
- Under My Learning click on the card
- Click on the image and you will then be brought to the module content

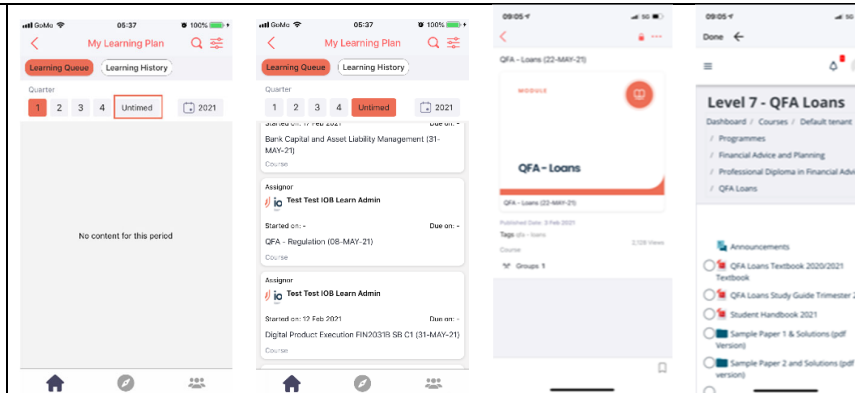


Another way to access module content is through learning plan

- Click on profile icon
- Click on My Learning Plan

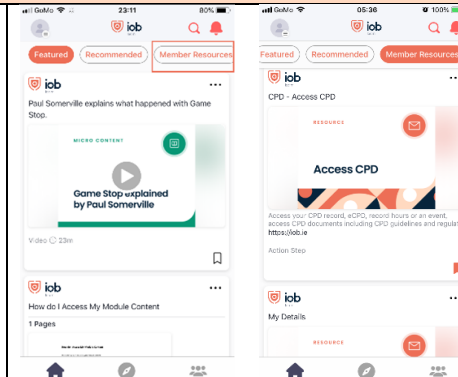


- Click on Untimed
- Click on module you wish to view
- Click on the image and you will then be brought to the module content

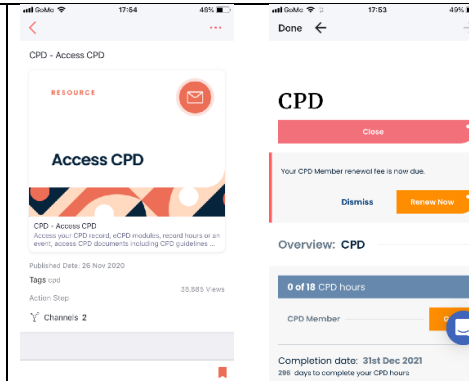


Accessing CPD/designation resources

- Click on Member Resources
- Scroll down and click 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

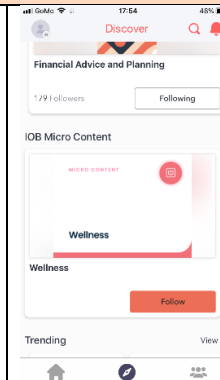


Accessing micro content

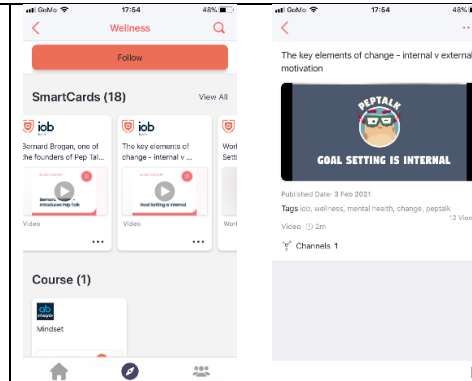
- Click on compass icon which represents Discover

Similarly to the desktop here you will find IOB Programmes on the top row and IOB Micro Content 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

