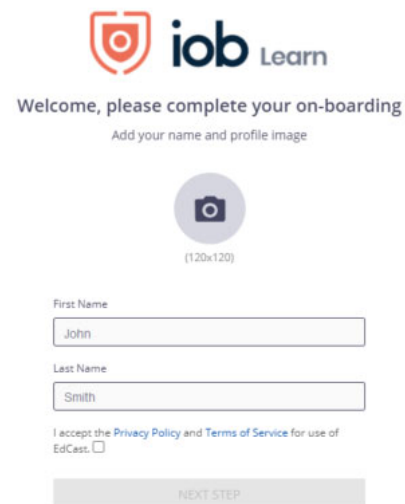# IOB Learn

User Guide

Contents

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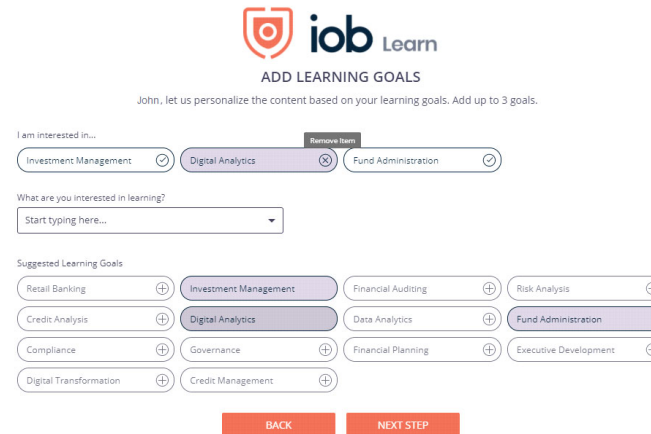
When logging into IOB Learn for the **first time** you will need to go through the onboarding process once you are logged in as follows:

- 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*

- 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*

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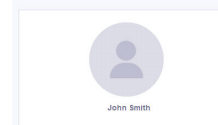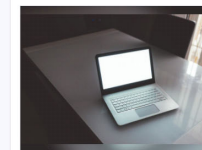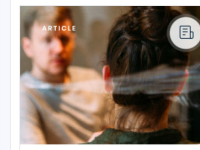
Homepage

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

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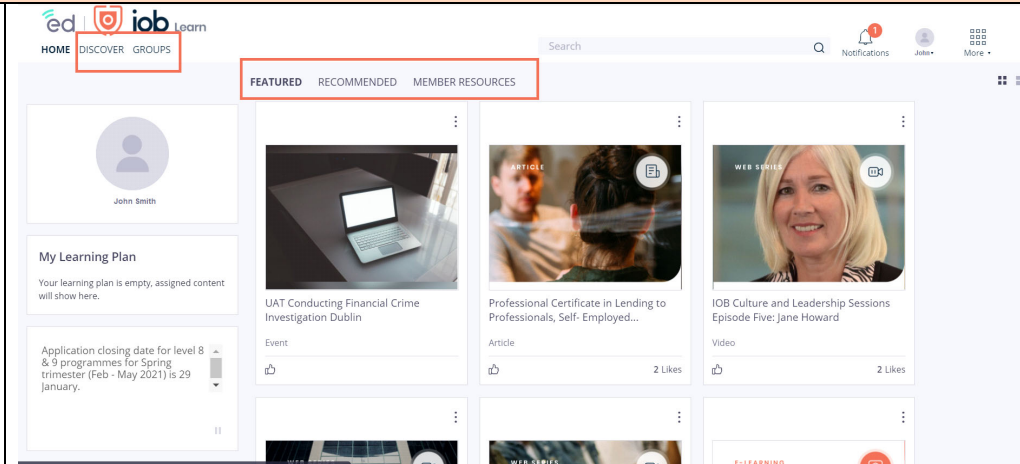
Recommended will show you content curated for you, based on interests that you have selected, the first time that you logged in.

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

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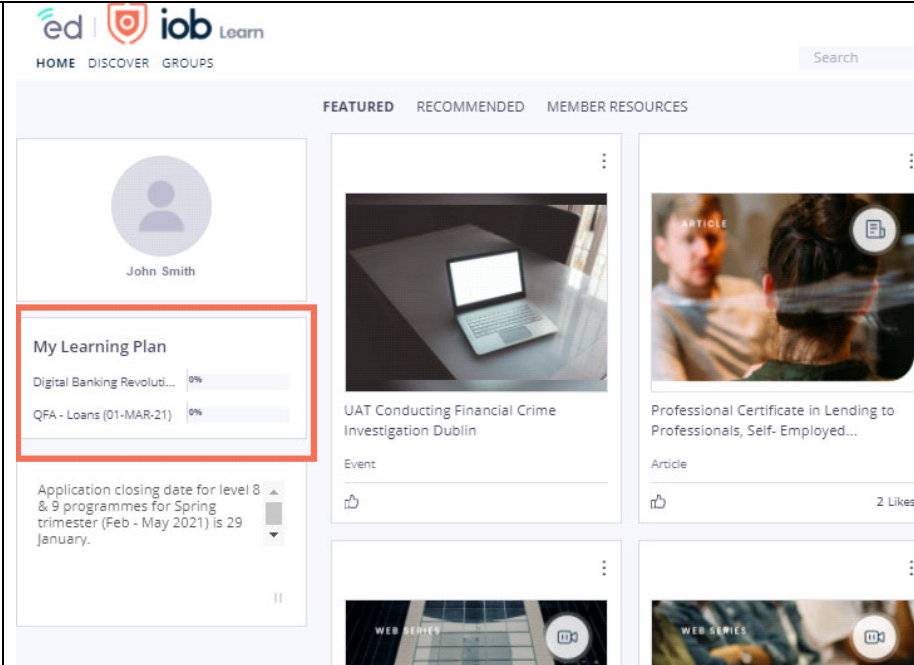
Groups is a learning community to which you are assigned and into which access to certain of your learning (modules, short course) will be placed.

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.

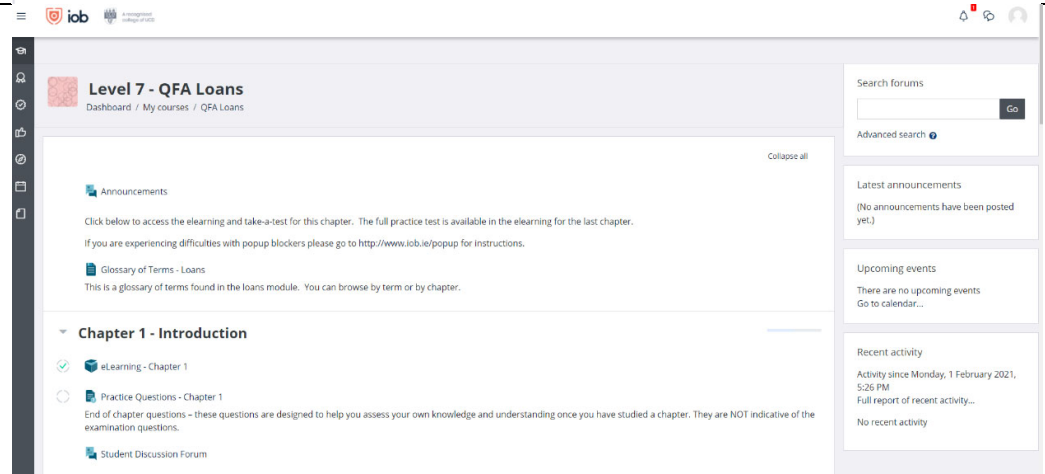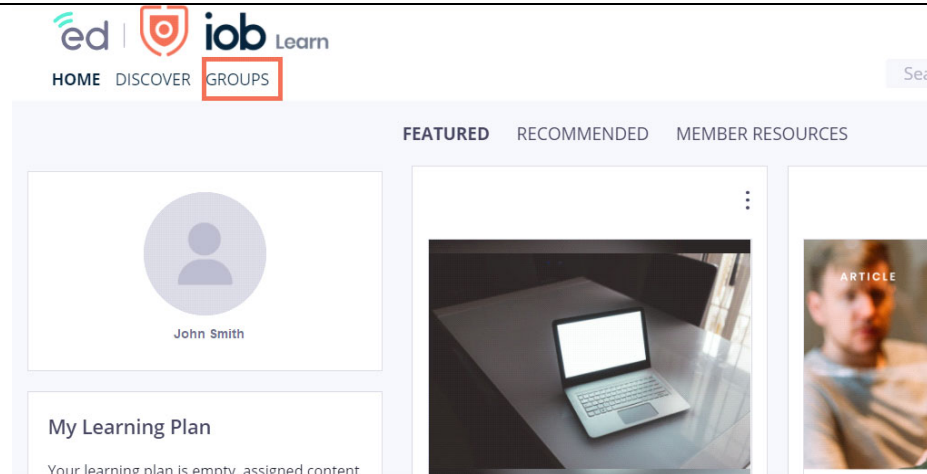|	
• Click on *View More* to access the content for that module	**QFA - Loans (01-MAR-21)** QFA - Loans (01-MAR-21) View More 🌐 Unspecified · 👁 Private Published Date: **20 Jan 2021**
• This will then bring you to the module content that contains all the materials for your module including, study guide, readings, associated texts and MCQ tests • Welcome email sent at the start of Trimester will include details on material available here	**Level 7 - QFA Loans** Dashboard / My courses / QFA Loans Collapse all 📢 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

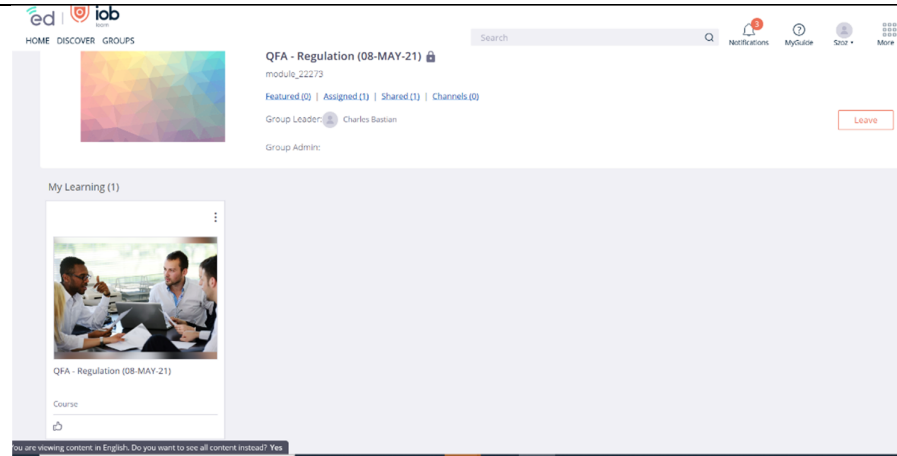|	
Second way is as follows: • Click *Groups*	
• Here you will see all the modules and short courses that you are registered for	
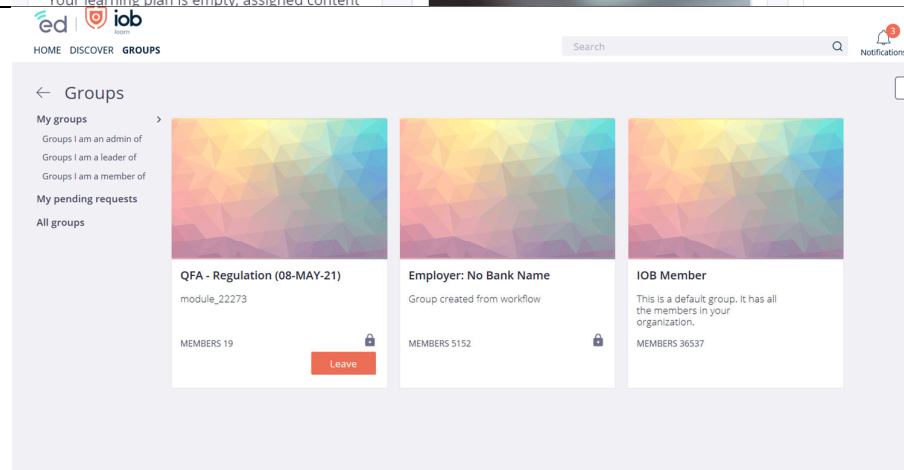
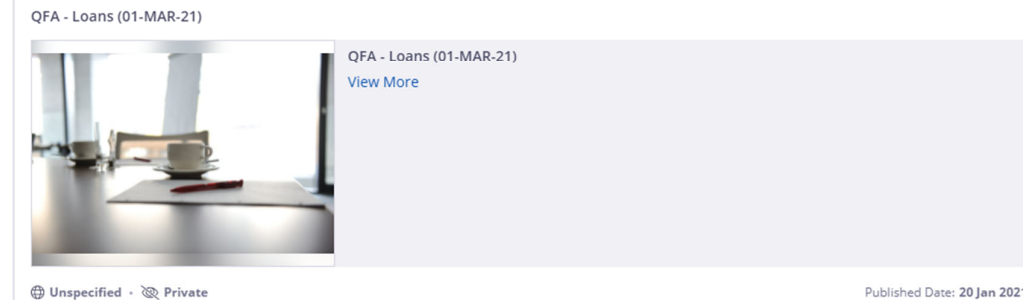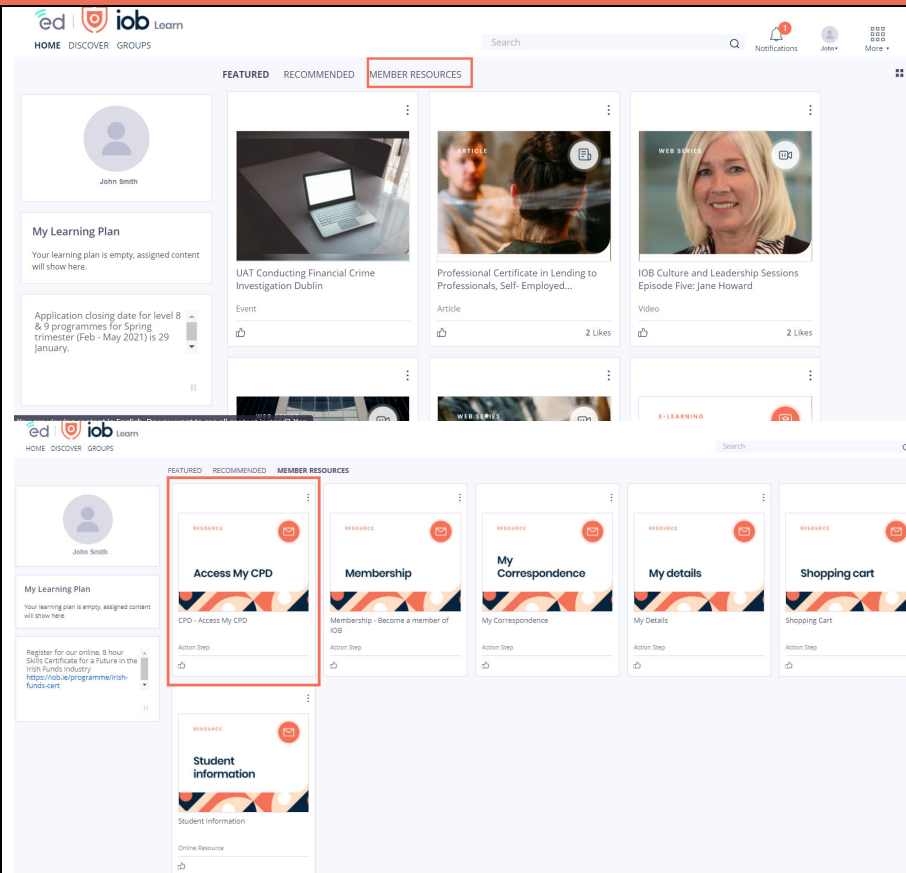|	
• Click on to the group card that shows your module name and all the cards linked to this module will appear	
• Click on module card with the name of the module and exam date on it, i.e "QFA Loans – 31 May 2021". • Click *View more* • You will then be directed to the module content that contains all 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 *Member resources*
- Click *View my CPD* card
- *Click View more* and you will be reditected to your CPD overview

- 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

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
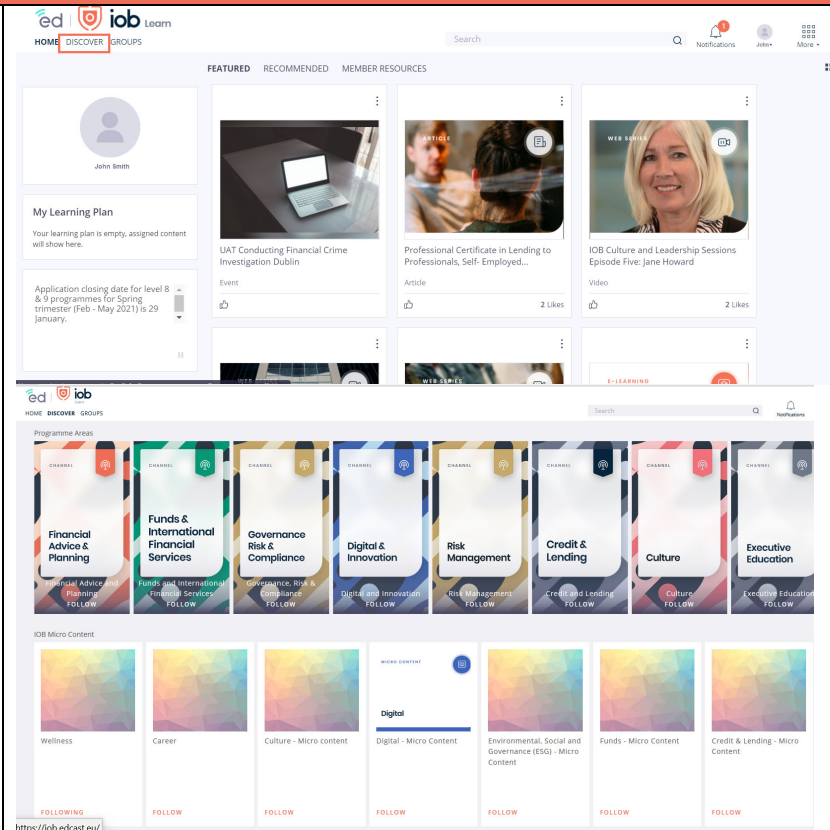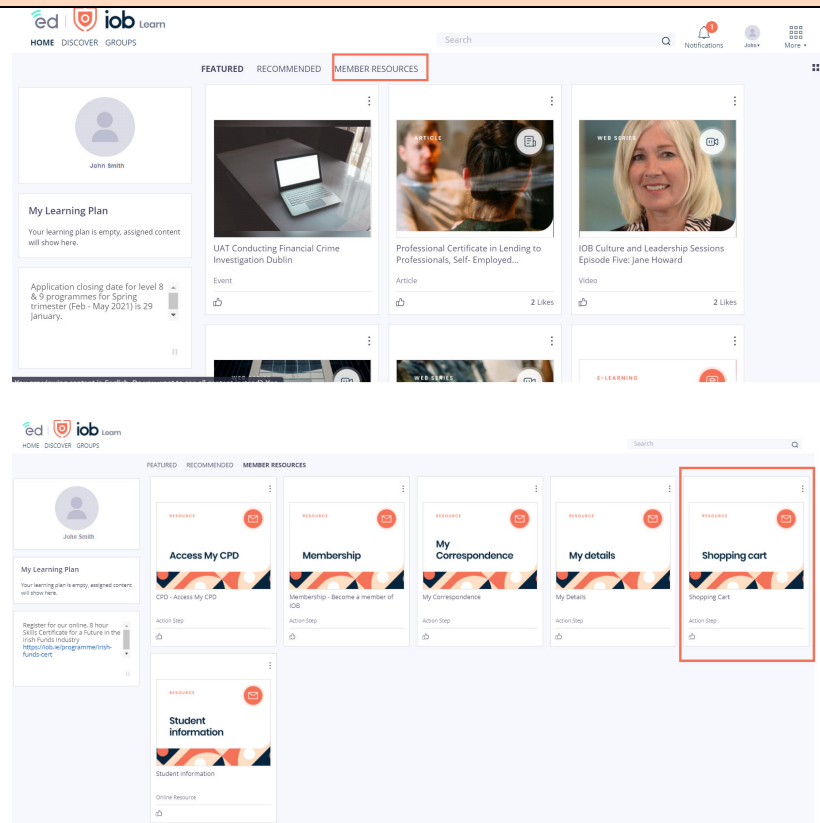
Shopping cart – access through IOB Learn

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

Re-registering for a module

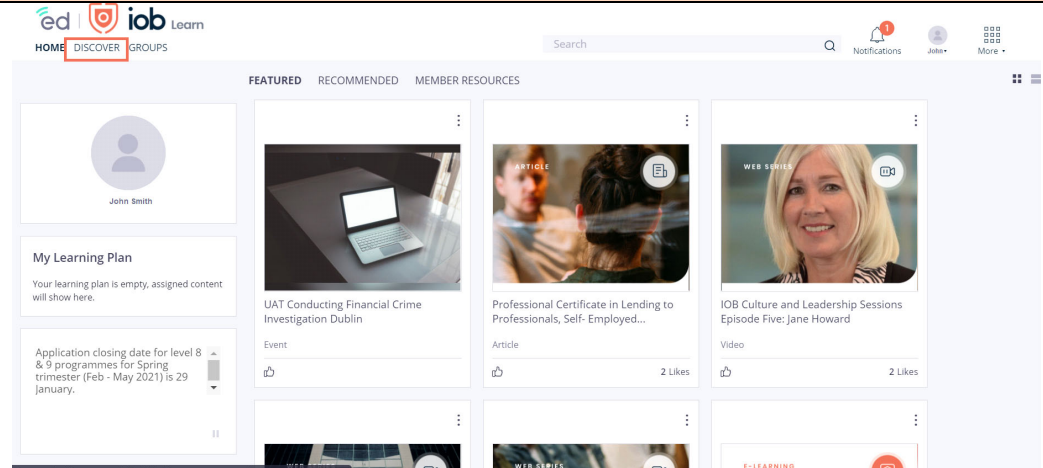- Click on *Member Resources*
- Click *Shopping Cart* card

- 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
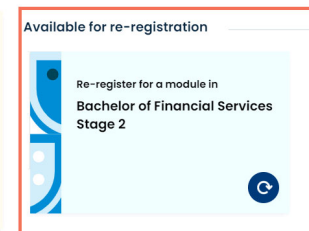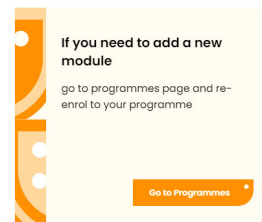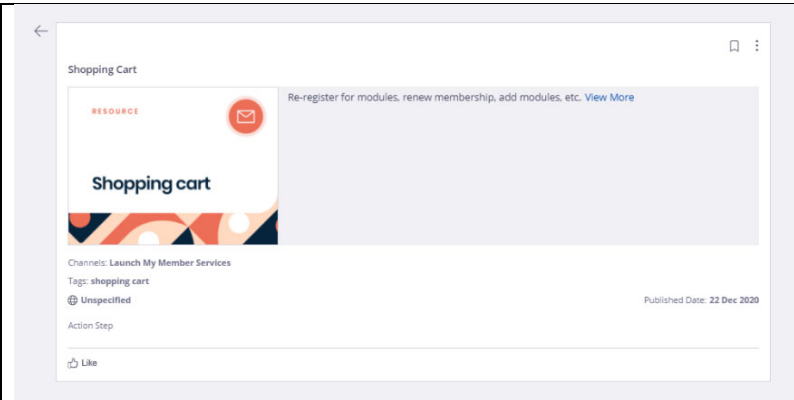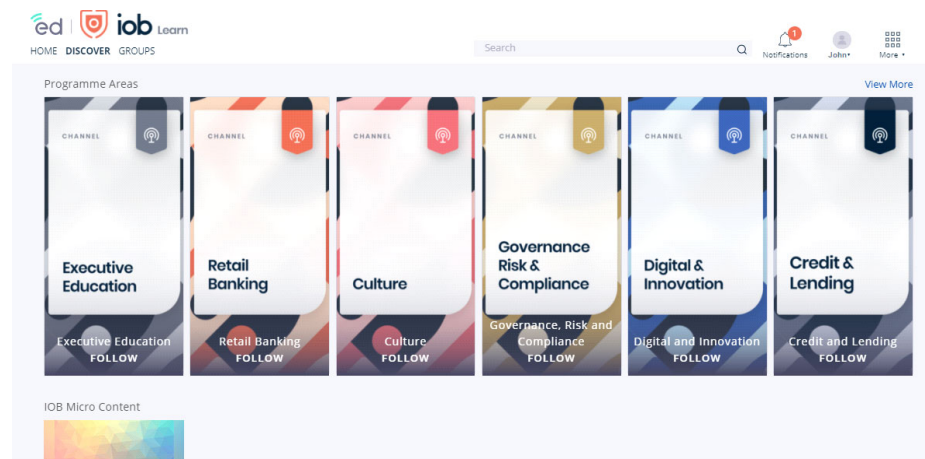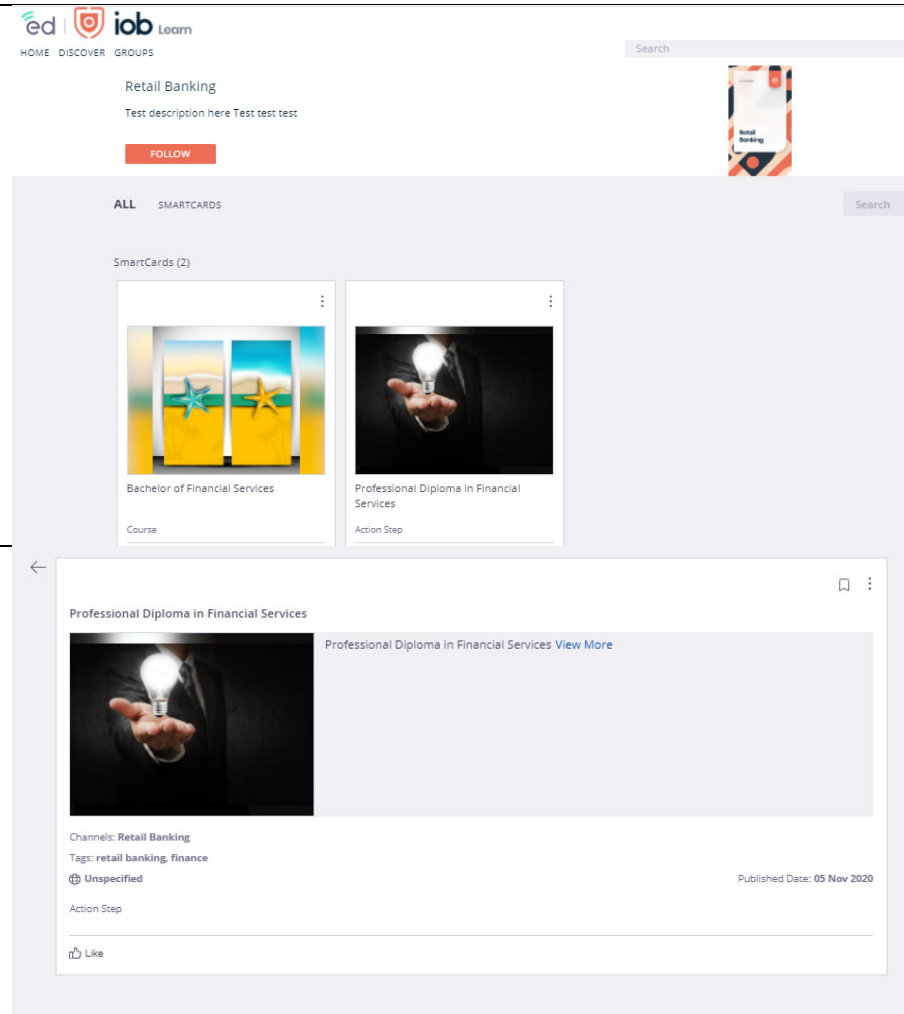
Applying and registering for a new programme

• 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

- 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.

- 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.
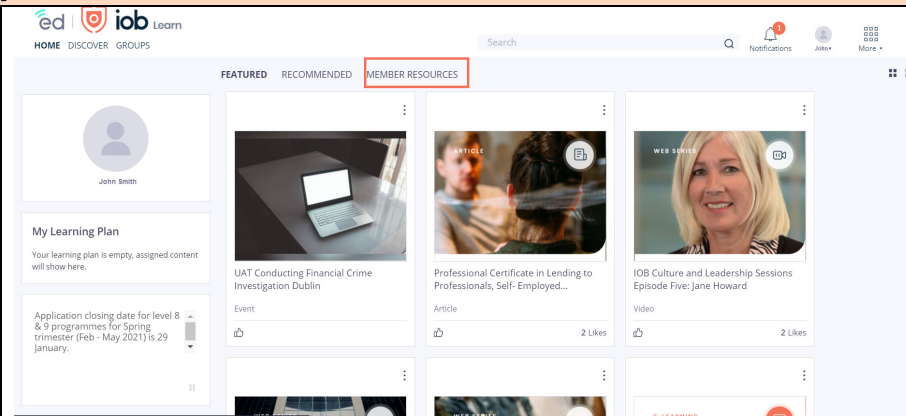
Paying membership fees (including designation fee)

- Click on *Member resources*

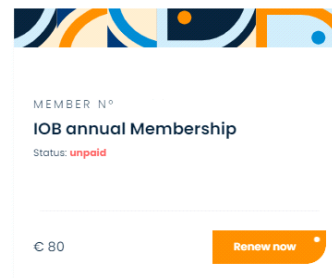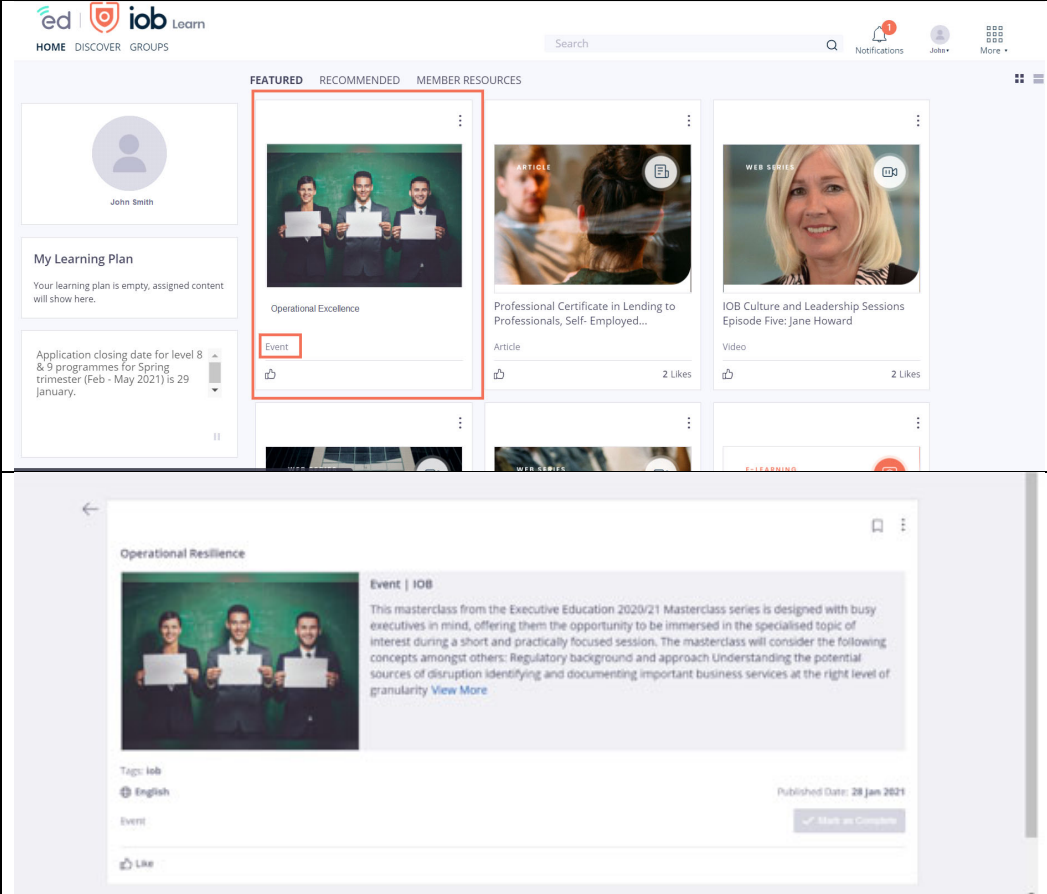|	
• Click *Shopping cart* card • Within the card click on *View more*	
• You will be redirected to the Shopping Cart where you can choose to renew your fees by selecting *Renew now* underneath the relevant fee(s)	
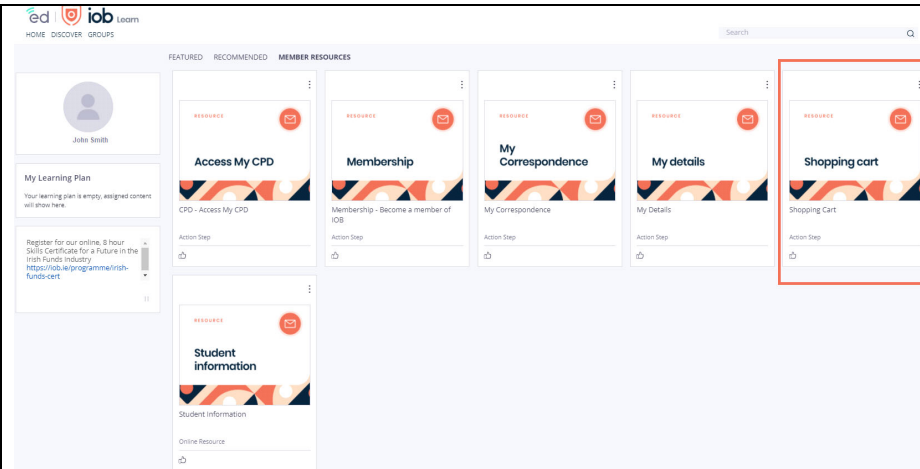
Registering for Events

Details of upcoming events are available on www.iob.ie/events as well as on IOB Learn in the *Featured* area.
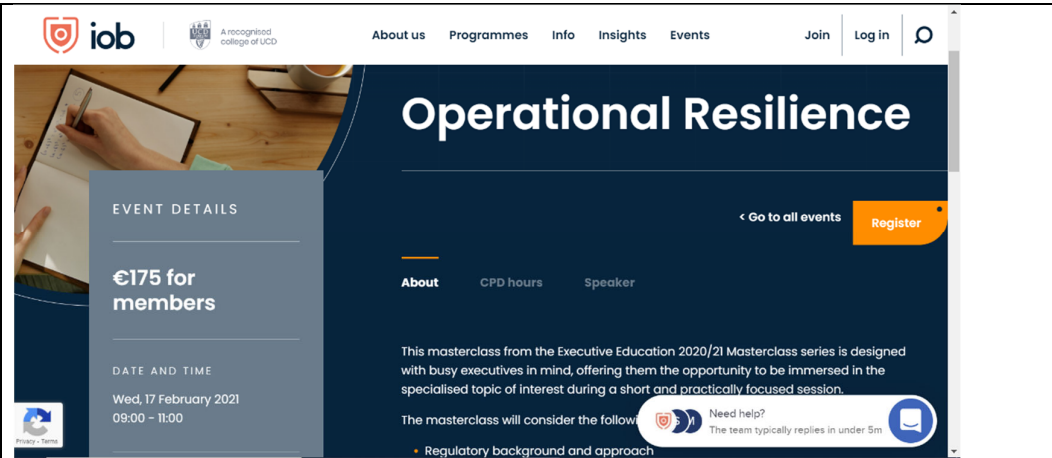
To register for event when in IOB Learn you:

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

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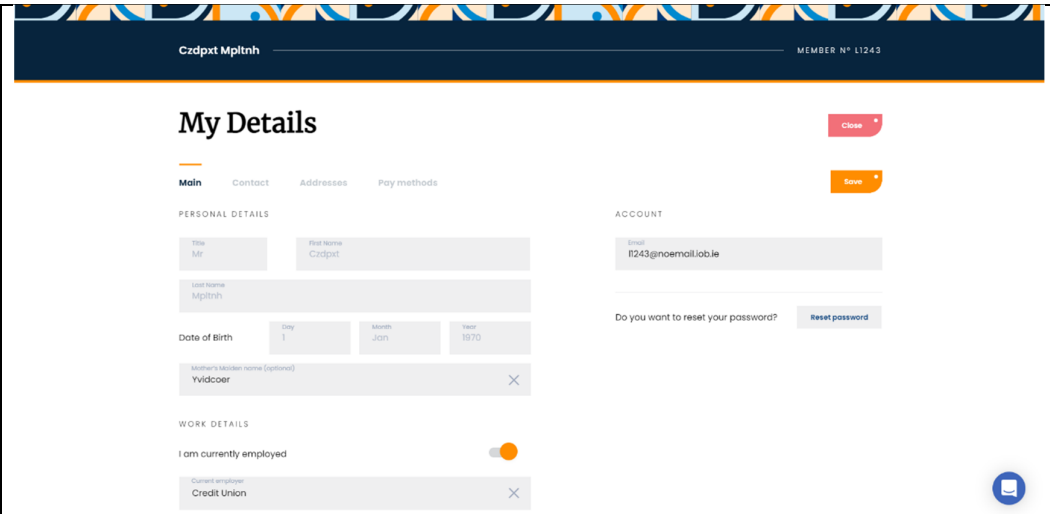
- Click on *Member Resources*
- Click *My Details* card
- Click View more within the card

- 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.

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	
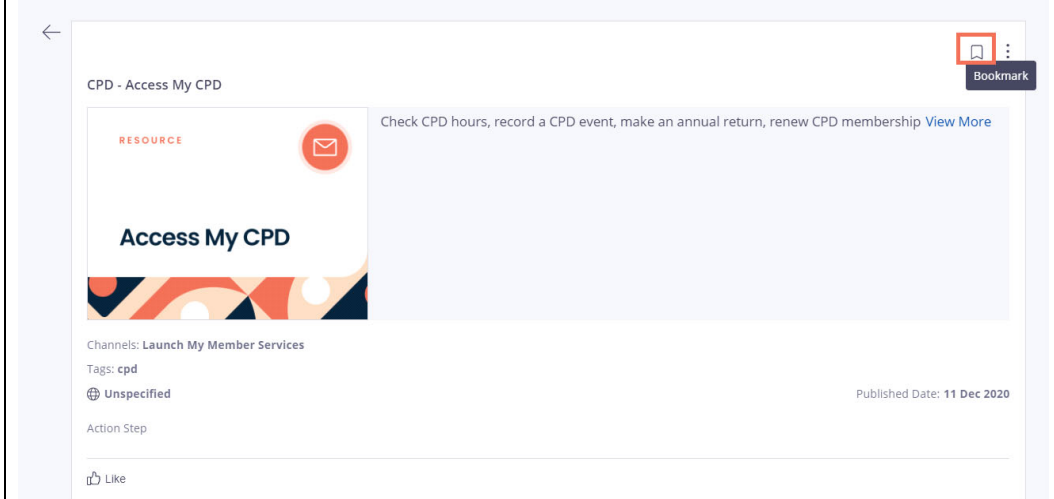
All your bookmarks will then appear together on one page

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
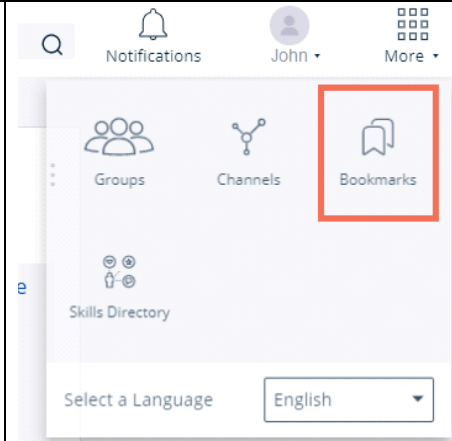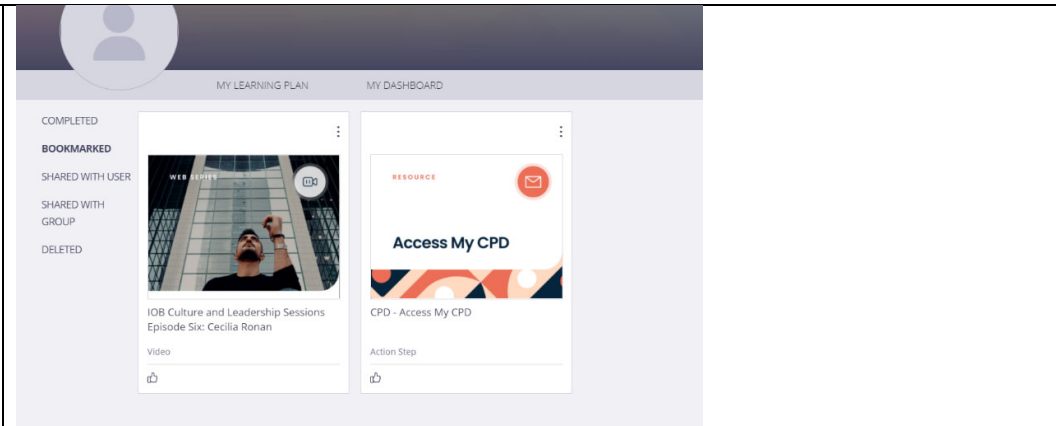
Downloading the app

- 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
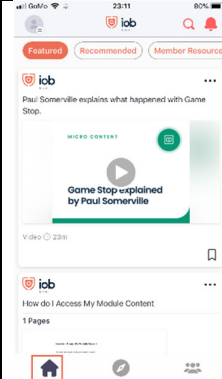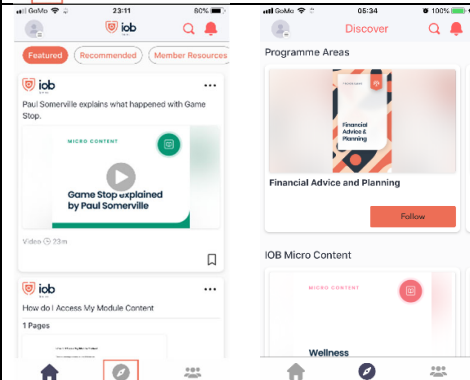
Logging in and homepage

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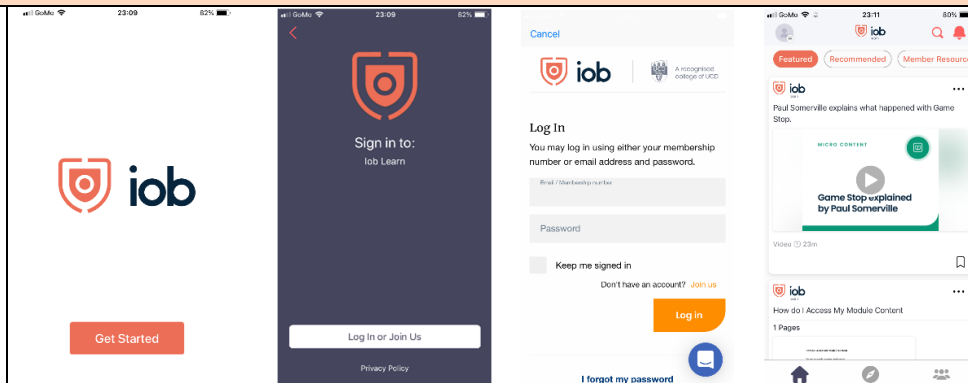
desktop version. For a little bit more detail on what is in each section please see pages 4 and 5 of this guide.	
Home icon will bring you to the homepage of the app	
Compass icon represents Discover section where you can locate micro content	

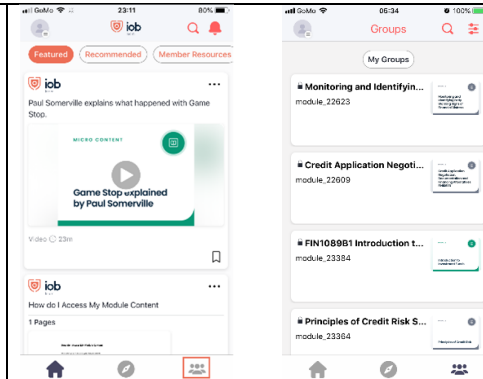|	
People icon represents Groups and this is one of the areas from where you can access your module material. See Accessing module material section below for further step-by-step guide on how to access the mateiral	
Under your profile icon you can view: • Your profile • Your Learning Goals/Areas of interest • Your learning plan (including module material) • Bookmarks • Groups • Downloads • Settings (cog wheel icon)	
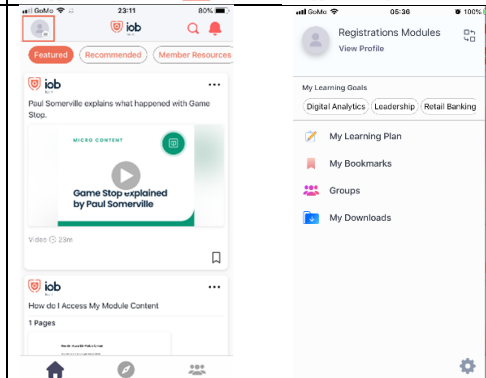
Under the settings in your profile you can: - Log out - Edit your profile info (profile and cover photo, bio, job role and skills) - Edit Learning goals/areas of interest and skills - Select Language - Set up notifications (this feature is not currently in use) - Manage dowoloads settings	
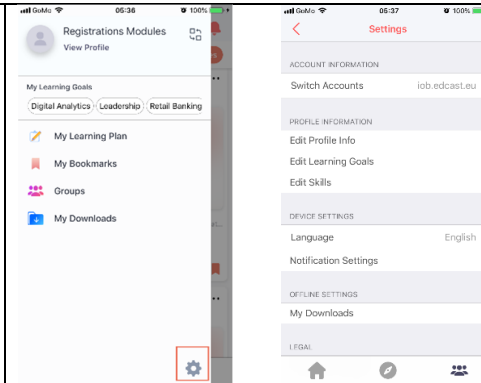
Accessing module material

- 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	
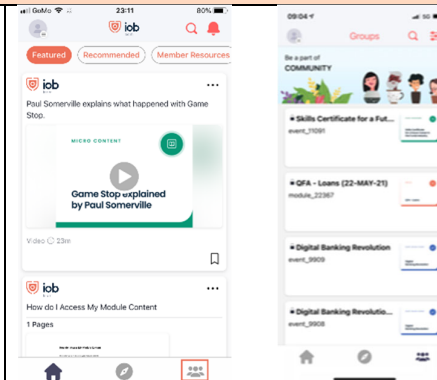
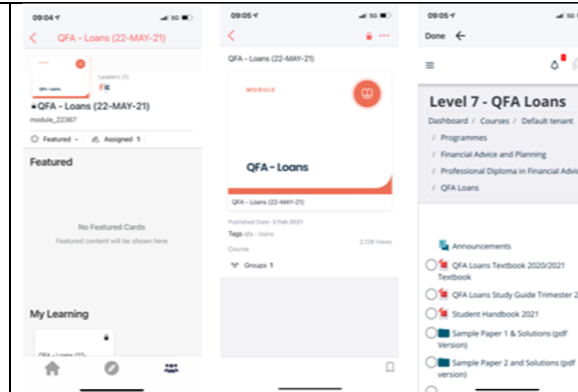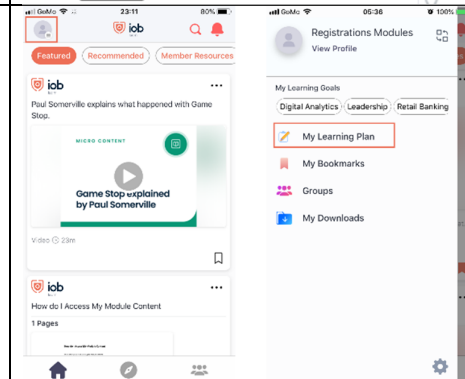|	
• Click on the module you wish to view • Under My Learning click on the card • Click on the image and you will then be brought to the module content	
Another way to access module content is through learning plan • Click on profile icon • Click on My Learning Plan	

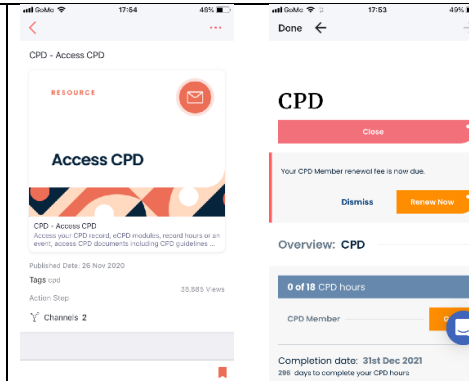| |
|---|
| • Click on Untimed
• Click on module you wish to view
• Click on the image and you will then be brought to the module content |
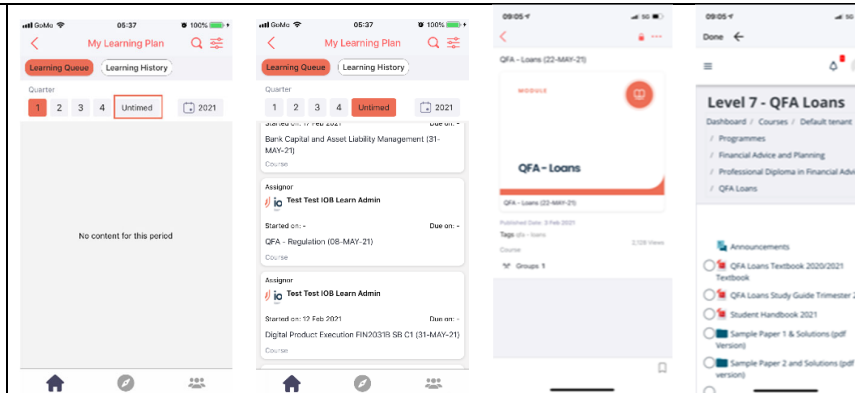
• Click on Member Resources • Scroll down and click on the Access CPD card
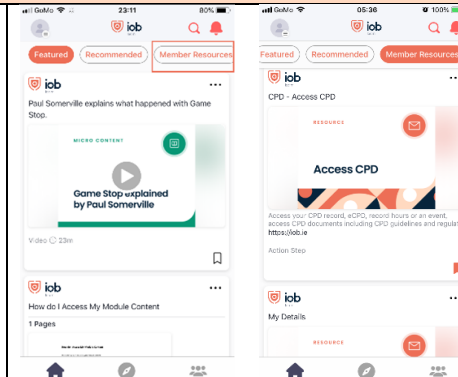
|	
• Click on the image • Click on Go against the designation you wish to view and you will be brought to the CPD environment where you can record and complete CPD hour	

Accessing micro content

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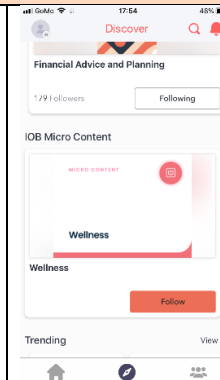
- Click on a topic, for example Wellness
- Here you will see content represented in cards
- Click on card you wish to view
- If content is
  - a video it will play the video
  - a pdf, article or course it will have a link to content
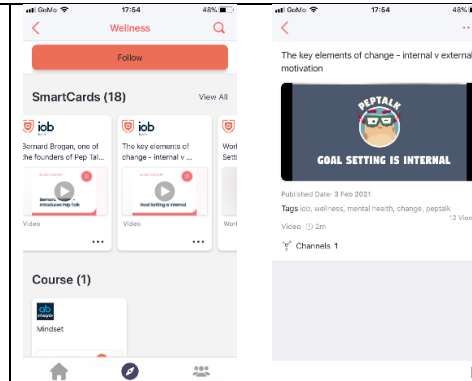
Logging out

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