



Courses, Module Permissions and Events - A Pathway that is Job Specific

Article Purpose

To review the way that module permissions can impact course content and to explore how Events - that have a specific date and time - can be included into learning pathways to provide an efficient but very human input into an e-learning based process such as onboarding.

Business Issue to solve

To implement an onboarding program that :

- Has modules for all new associates as they join the company
- Has specialist modules that are role-based, and that should be included after the initial modules - but only where relevant to the job role
- Has the ability for HR to provide a personal check-in meeting to make sure onboarding is proceeding well - at the appropriate time in each associates onboarding experience.

Courses and module permission

In this example, all new staff should see 2 modules to help them as they orientate themselves in the company.

But here we also have 2 specialist modules - one for the sales team and one for the accounts team.

By using **module permissions** this can easily be implemented so that the course content is automatically appropriate for each new associate - in this case, General, Sales team or Accounts.

Here for sales :

Learning / Courses / Onboarding

The screenshot shows a course titled 'Onboarding (CLA-ONB)' with a 'Live' status. It lists three modules: 'Onboarding Module 1' (First Onboarding Module), 'Onboarding Module 2' (Second onboarding module), and 'Sales Team Onboarding' (Onboarding module for the sales team). The course is described as 'Onboarding course with specialised modules' and has a 'Started' date of '24-10-2021 21:11'. There is also an 'Expected duration' field.

Here for accounts:

Adding an event for HR Review

Once the tailored onboarding has been completed HR would like to have a meeting with the new associate to make sure that everything is proceeding well.

This Requires a Pathway

Pathways allow us to add Events to the normal content of e-learning - courses and quizzes.

- However - Events by definition have a specific date - and yet associates can join our onboarding pathway at any time - and in larger companies, this will be a regular occurrence.
- Solution - Recurring events allow us to offer the ideal solution for a learning pathway.

In this case, HR simply needs to reserve a weekly slot as an event - here Friday at 3 pm. As a user progresses along a pathway they will always be offered the next available event - 'Next Friday'.

As this is a personal review HR can also limit the attendance to just 2 people, or more if a small group is appropriate.

Summary

What we have reviewed:

- Use module permissions within a course to tailor the content based on each new associates job role
- Use repeating events to allow a human-based check-in to complete the onboarding experience at the appropriate time for each associate.

Additional Functionality:

- We can set an onboarding deadline - in this case, 3 weeks
- We can link this to a button that is only shown to a group 'New Starters'
- We can add context to a 'New Starters' page in the intranet - using for example text and video information
- Any information such as a 'New Starters' page can be invisible to users who are no longer in the 'New Starters' group
- InfoCapture can compliment onboarding e-learning with a process for all new joiners - ensuring relevant stakeholders complete tasks as the associate onboard

Related Article

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Tags: events, onboarding, module permissions, course