



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 is described as an 'Onboarding course with specialised modules'. The course is 'Started' and 'Finished' on '24-10-2021 21:11'. The 'Expected duration' is indicated by a clock icon. The course content is organized into three modules:

- Onboarding Module 1**: First Onboarding Module
- Onboarding Module 2**: Second onboarding module
- Sales Team Onboarding**: Onboarding module for the sales team

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

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