Audiences

Introduction

Audience management allows site-wide user groups to be populated manually or dynamically using unlimited combinations of rules built on supplied HR data, user completion records, and other collected user metrics. The feature also allows each group to be assigned to a limitless number of courses, programs, and certifications and is especially powerful when used with HR Import. With both features enabled, your organisation's enrolments throughout your learning catalogue will be automatically updated based on your regular HR feed and the extensive range of business rules you define.

You can use these groups to enrol learners in particular courses, programs, and certifications. There are two types of groups:

1. **Set:** A set group allows you to manually select and add any user to the group.
2. **Dynamic:** A dynamic group is automatically maintained based on a set of rules you create.

Set audiences

Create a set audience

1. Select *Site administration > Users > Accounts*.

2. Select **Audiences**.

3. The audience management page appears and any audiences already set up are displayed here. Select the **Add new audience** tab.

4. Enter the audience **Name**. This is a mandatory field.

5. Select the **Context**. An audience can be set up at a system context or in a particular course category context.

6. Select **Set** from the *Type* dropdown field.

7. You can use the **Audiences ID** number and **Description** if required. The **Audiences ID** number needs to be a unique identifier.

8. Set the **Start date** and **End date**.
   Note
   Setting a **Start date** and **End date** only affects **Dynamic** audience types.

9. Set the **Alerts**. These control the notifications sent to the audience group members.

   There are 3 options:

- **Do not send alerts:** Prevents alerts from being sent to the learners in the group.
- **Send alerts to affected members only:** Allows you to only send notifications to audience group members affected by changes in the membership of the group.
- **Send alerts to all members:** Sends all alerts to all audience group members, bear in mind some audiences can be very large.

10. Select **Save changes**.

11. The *Edit members* tab will appear. To assign members to the audience group, search the list of potential users in the right hand column, select the user(s) you require and select **Add**. The user(s) now appear in the *Current users* column.

12. Select **Back to audiences** to return to the audience management page.

Edit a set audience

1. Select *Site administration > Users > Accounts.*

2. Select **Audiences**.

3. The audience management page appears and any audiences already set up are displayed here. Select the **edit** icon.

4. Select the tab that holds the details you wish to edit:

- **Edit details**: Allows you to edit the *Name*, *Audiences ID*, *Description*, *Start date*, *End date* and *Alerts* for the audience group.
- **Edit members:** Allows you to add and remove users from the audience group.
- **Enrolled learning:** Allows you to add and remove courses, programs, and certifications from the enrolled learning list.
- **Visible learning:** Allows you to add and remove courses, programs, and certifications from the visible learning list.
- **Learning Plan:** Allows you to automatically create learning plans for all audience members.
- **Goals:** Allows you to assign goals to all audience members.
- **Assign Roles:** Allows you to assign roles with permissions to the audience members.

5. Select **Back to audiences** when finished.

Dynamic audiences

Create a dynamic audience

1. Select *Site administration > Users > Accounts.*

2. Select **Audiences**.

3. The audience management page appears and any audiences already set up are displayed here. Select the **Add new audience** tab.

4. Enter the audience **Name**. This is a mandatory field.

5. Select the **Context**. An audience can be set up at a system context or in a particular course category context.

6. Select **Dynamic** from the *Type* dropdown field.

7. You can use the **Audiences ID** number and **Description** if required. The **Audiences ID** number needs to be a unique identifier.

8. Set the **Start date** and **End date**.
   Note
   If a **Start date** or **End date** is specified, audience members will not be automatically updated prior to the start date or after the end date. However, if audience rules are updated, regardless of the specified time, this will cause the membership to be updated.

9. Set the **Alerts**. These control the notifications sent to the audience group members.

   There are 3 options:

- **Do not send alerts:** Prevents alerts from being sent to the learners in the group.
- **Send alerts to affected members only:** Allows you to only send notifications to audience group members affected by changes in the membership of the group.
- **Send alerts to all members:** Sends all alerts to all audience group members, bear in mind some audiences can be very large.

10. Select **Save changes**.

Manage rule sets

Selecting the **Rule Set** tab allows you to set rules which define the membership of the audience group. Rules are set up in groups called "Rule Sets". A rule set can have multiple rules and you can include multiple rule sets for each audience group.

Automatically update membership

These options change the way that membership of the audience is updated based on when a user meets the audience rules. The configuration of these settings define when a user should be added to or removed from audience membership.

You can configure this based on the following checkbox options:

- Make a user a member when they meet rule sets criteria.
- Remove a user's membership when they no longer meet the rule sets criteria.
  Note

  Unselecting both options will freeze membership until either (or both) of the options are changed.

Membership setting between every rule set.

This setting determines how the audience rules will behave if you define more than one rule set. It is based on the logical "AND" and "OR" operators.

- If set to "AND", then a user will only be added to the audience if they satisfy the conditions of **all** of the rule sets (they will be omitted if they fail to satisfy even one ruleset).
- If set to "OR", then a user will be added to the audience if they satisfy the conditions of **any** of the rule sets (they only have to satisfy the conditions of a single rule set to be included).

  Note that each ruleset has its own separate logical operator to indicate the relationship between the rules within that rule set.

Adding rule sets

1. Select the **Add rule** dropdown menu and select the rule you wish to add to the audience group.

   There are a large number of available options:

- **User profile:** You can use the fields from the user profile to add users to the audience e.g. *Username*, *ID number*, *Language preference*, *Country* and any custom fields added to the user profile page.
- **Position:** You can use information from the position hierarchy to add users to an audience e.g. *Position, Position ID, Has direct reports.*
- **Organisation:** You can use information from the organisation hierarchy to add users to an audience e.g. Organisation, Organisation ID, Has direct reports.
- **Learning:** You can use the completion of a learning event e.g. *Course completion* and *Program completion* to add users to your audience group.
- **Audience:** You can use other audience membership to add users to your audience.
- **System Access:** Use the *First login date* or *Last login date* to add a user to the audience group.

2. Set the rule options as required and select **Save**.

3. When a rule has been added to *Ruleset #1* the **Membership setting between each rule in this rule set option** appears. If you have two or more rules in your set this allows you to set the logic between the rules in this set.

   There are two choices:

- **And:** The user needs to match every rule in the set.
- **Or:** The user needs to match one of the rules in the set.

4. You can set as many rules as required to make your audience group. When you have added all the required rules click **Approve changes** to save your rules.

Edit a dynamic audience

1. Select *Site administration > Users > Accounts.*

2. Select **Audiences**.

3. The audience management page appears and any audiences already set up are displayed here. Select the **edit** icon.

4. Select the tab that holds the details you wish to edit:

- **Edit details**: Allows you to edit the *Name*, *Audiences ID*, *Description*, *Start date*, *End date* and *Alerts* for the audience group.
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5. Select **Back to audiences** when finished.