

Audiences

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 audiences functionality allows administrators to quickly or automatically assign members to:

- Enrolment in any number of courses, programs and/or certifications.
- Visibility of any number of courses, programs and/or certifications.
- Access to any number of learning plan templates or pre-populated learning plans.
- Company goals.
- System level access rights.

Audiences are especially powerful when used alongside HR Import. With both features enabled and configured, a range of user administration and enrolment actions can be automatically processed based on your regular HR feed and the extensive range of business rules you define.

There are two types of audiences:

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

(This video is taken from the [Audiences](#) course on the Totara Academy, where you can access more resources and learning materials - including other videos).

The screenshot shows the 'Audiences' management interface. At the top, there are tabs for 'ALL AUDIENCES', 'SYSTEM AUDIENCES', 'ADD NEW AUDIENCE', and 'UPLOAD AUDIENCES'. Below the tabs is a search bar with a dropdown menu set to 'contains'. The search bar has 'Search' and 'Clear' buttons. Below the search bar is a 'Show more...' link. The main content is a table with the following columns: Audience Name, Id, No. of Members, Type, Start date, End date, Status, Category, and Actions. The table contains two rows: 'Example Dynamic Audience' with Id 'AUD00001', 0 members, Dynamic type, Active status, and System category; and 'Set Audience 1' with Id 'AUD000021', 0 members, Set type, Active status, and System category. At the bottom of the table, there is an 'Export as' dropdown menu set to 'CSV' and an 'Export' button.

Audience Name	Id	No. of Members	Type	Start date	End date	Status	Category	Actions
Example Dynamic Audience	AUD00001	0	Dynamic			Active	System	+ - x
Set Audience 1	AUD000021	0	Set			Active	System	+ - x

Set audiences

Due to the simple but manual process required to add and remove audience members, set audiences are typically used where there are a limited number of individuals within the group, with infrequent updates to the members of the audience. Examples might include a set audience for course creators across a site or members of a specific project team.

Creating a set audience

1. Within the *Site administration* menu select **Audiences**.
2. Select the **Add new audience** tab.
3. Enter the audience **Name**. This is a mandatory field.
4. Select the **Context**. An audience can be set up at a system context or within a particular course category context.
5. Select **Set** from the **Type** dropdown field.
6. Enter an **Audiences ID** number and **Description** if required. The **Audiences ID** number needs to be a unique identifier.
7. Set the **Start date**.



If a **Start date** is provided:

- Access to dashboards granted by this audience will not be available until this date.
- If this is a dynamic audience, audience members will not be automatically updated until this date.

8. Set the **End date**.

On this page



The Totara Academy has a whole course dedicated to using [Audiences](#) in Totara Learn. Here you can learn more on how to use audiences, see best practice, and give it a go yourself.



If an **End date** is provided:

- Access to dashboards granted by this audience will not be available after this date.
- If this is a dynamic audience, audience members will not be automatically updated after this date.

9. Set the **Alerts**. These control the notifications sent to the audience group members. Choose from:
 - **Do not send alerts:** Alerts will not be sent to members when they are added or removed from this 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. Enter in any **Tags** that should be associated with this Audience.
11. Select **Save changes**.
12. You will be automatically taken to the **Edit members** tab for this new audience.

Managing set audience members

To assign members to the audience group, search or browse 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.

To remove members from the audience group, search or browse the list of **Current users** in the left hand column, select the user(s) you require and select **Remove**. The user(s) now appear in the **Potential users** column.

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

The screenshot shows two columns: 'Current users' on the left and 'Potential users' on the right. The 'Current users' column contains one user: 'Example Learner (learner@example.com)'. The 'Potential users' column contains three users: 'Jane Learner (jane@example.com)', 'Site Manager (sitemanager@example.com)', and 'Admin User (admin@example.com)'. Between the columns are 'Add' and 'Remove' buttons. Below each column is a search bar with a 'Clear' button. At the bottom left, there are 'Search options' and a 'Back to audiences' button.



Removing users from an audience may result in the unenrolment of users from multiple courses. This will include the deletion of user settings, grades, group membership and other user information from affected courses.

Editing a set audience

1. Go to *Site administration > Audiences*
2. Select the **Edit** icon (⚙️) against the corresponding audience.
3. Navigate to the audience editing tab holding the details you wish to review or change.
4. Select **Save changes** when finished.

OVERVIEW EDIT DETAILS MEMBERS **EDIT MEMBERS** ENROLLED LEARNING LEARNING PLAN GOALS ASSIGN ROLES

Tab	Description	Notes
Edit details	Allows you to change the Name , Audiences ID , Description , Start date , End date and Alerts setting for the audience.	-
Members	View and search for the current members of the audience.	-

Edit members	Allows you to add and remove users from a set audience group.	See Editing set audience members for instructions on adding and removing users from a set audience.
Enrolled learning	<p>Allows you to enrol or unenrol the members of this audience into any number of courses, programs, and certifications.</p> <p>Select Add courses, Add programs or Add certifications and choose the required learning items from the list to enrol the audience members. Save any changes.</p> <p>Use the corresponding Delete icon () to remove a learning item from the Enrolled learning list and unenrol audience members.</p>	<p>Learning will be made available immediately to new users once they've registered. Audience membership as well as audience-based enrolled learning (i.e. course enrolment and certification /program assignment) will occur before new users first log into the platform.</p> <p>For existing users enrolments will be processed in the background when adding courses to the enrolled learning tab in audiences.</p> <p>Course deletion may take minutes to process, depending on audience size. Once completed, the course association will be removed from this audience.</p>
Visible learning	<p>Use this setting to limit the visibility of specific courses, programs and certifications to audience members.</p> <p>Select Add courses, Add programs or Add certifications and choose the required learning items from the list and Save any changes.</p> <p>Choose from the following Visibility settings:</p> <ul style="list-style-type: none"> • No users • All users • Enrolled users only - only users enrolled in this learning item will be able to see it within the course catalogue. • Enrolled users and members of selected audience - users enrolled in this learning and members of the current audience will be able to see it within the course catalogue. <p>Use the corresponding Delete icon () to remove a learning item from the Visible learning list and remove the audience based visibility settings.</p>	<p>Audience based visibility must be enabled via Advanced features before this tab will appear.</p> <p>Audience visibility will effect which learning items are displayed to users within the Course catalogue.</p>
Learning Plan	Allows you to assign learning plan templates and automatically create learning plans for all audience members.	Please see Learning plans for more information on creating learning plans.
Goals	<p>Allows you to assign company goals to all audience members.</p> <p>Once you have setup goals on your Totara Learn site, you can then assign these to all members of an audience.</p> <ol style="list-style-type: none"> 1. Click the Add Goal button. 2. If you have only a single goal framework you can simply click the goals you wish to add. If you have multiple frameworks then you can select the desired framework from a dropdown menu and then select goals by clicking on them. You can also click the Search tab to find a particular goal. 3. Once you have chosen the goal(s) you wish to add click Save. 	See Goals for more information on creating Goal frameworks.
Assign Roles	<p>Allows you to assign roles with permissions (access rights) to the audience members.</p> <p>Tick the box along the role(s) you wish to assign to members of the audience and select the Assign selected role(s) to this audience button.</p>	Please see Roles for more information on access rights.

Dynamic audiences

Dynamic audiences are typically used where there will be large number of audience members or frequent updates to memberships. Dynamic audiences can also be useful where there are a large number of users within the site, where searching and adding users manually to a set audience is particularly time consuming. Examples might include a dynamic audience for all staff managers within your Totara Learn site, all users with a particular department of your organisation or individuals who are certified first-aid practitioners.

Creating a dynamic audience

1. Select *Site administration > Audiences*
2. Select the **Add new audience** tab.
3. Enter the audience **Name**. This is a mandatory field.
4. Select the **Context**. An audience can be set up at a system context or in a particular course category context.
5. Select **Dynamic** from the **Type** dropdown field.
6. Enter an **Audiences ID** number and **Description** if required. The **Audiences ID** number needs to be a unique identifier.
7. Set the **Start date**



If a **Start date** is provided:

- Access to dashboards granted by this audience will not be available until this date.
- If this is a dynamic audience, audience members will not be automatically updated until this date.

8. Set the **End date**.



If an **End date** is provided:

- Access to dashboards granted by this audience will not be available after this date.
- If this is a dynamic audience, audience members will not be automatically updated after this date.

9. Set the **Alerts**. These control the notifications sent to the audience group members. There are three options:
 - **Do not send alerts**: Alerts will not be sent to members when they are added or removed from this 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. Enter in any **Tags** that should be associated with this Audience.
11. Select **Save changes**.
12. You will be automatically taken to the **Rule sets** tab for this new audience

Now you can [add your rules](#) to determine which learners are added and removed from the audience.

Editing a dynamic audience

1. Select *Site administration > Audiences*
2. Select the **Edit** icon () against the corresponding audience.
3. Select the audience editing tab that holds the details you wish to review or change.
4. Select **Save changes** when finished.

OVERVIEW EDIT DETAILS **RULE SETS** MEMBERS ENROLLED LEARNING LEARNING PLAN GOALS ASSIGN ROLES

Tab	Description	Notes
Edit details	Allows you to change the Name, Audiences ID, Description, Start date, End date and Alerts setting for the audience.	-
Rule sets	Use rule sets to specify the criteria for membership to the audience.	Please see Audience rules for instructions on adding rule sets to dynamic audiences.

Members	View and search for the current members of the audience.	-
Enrolled learning	<p>Allows you to enrol or unenrol the members of this audience into any number of courses, programs, and certifications.</p> <p>Select Add courses, Add programs or Add certifications and choose the required learning items from the list to enrol the audience members. Save any changes.</p> <p>Use the corresponding Delete icon () to remove a learning item from the Enrolled learning list and unenrol audience members.</p>	<p>Learning will be made available immediately to new users once they've registered. Audience membership as well as audience-based enrolled learning (i.e. course enrolment and certification /program assignment) will occur before new users first log into the platform.</p> <p>For existing users enrolments will be processed in the background when adding courses to the enrolled learning tab in audiences.</p> <p>Course deletion may take minutes to process, depending on audience size. Once completed, the course association will be removed from this audience.</p>
Visible learning	<p>Use this setting to limit the visibility of specific courses, programs and certifications to audience members.</p> <p>Select Add courses, Add programs or Add certifications and choose the required learning items from the list and Save any changes.</p> <p>Choose from the following Visibility settings:</p> <ul style="list-style-type: none"> • No users • All users • Enrolled users only - only users enrolled in this learning item will be able to see it within the course catalogue. • Enrolled users and members of selected audience - users enrolled in this learning and members of the current audience will be able to see it within the course catalogue. <p>Use the corresponding Delete icon () to remove a learning item from the Visible learning list and remove the audience based visibility settings.</p>	<p>Audience based visibility must be enabled via Advanced features before this tab will appear.</p> <p>Audience visibility will effect which learning items are displayed to users within the Course catalogue.</p>
Learning Plan	Allows you to assign learning plan templates and automatically create learning plans for all audience members.	<p>If a user is removed from the audience any created learning plans will remain.</p> <p>Please see Learning plans for more information on creating learning plans.</p>
Goals	<p>Allows you to assign company goals to all audience members.</p> <p>Once you have setup goals on your Totara Learn site, you can then assign these to all members of an audience.</p> <ol style="list-style-type: none"> 1. Click the Add Goal button. 2. If you have only a single goal framework you can simply click the goals you wish to add. If you have multiple frameworks then you can select the desired framework from a dropdown menu and then select goals by clicking on them. You can also click the Search tab to find a particular goal. 3. Once you have chosen the goal(s) you wish to add click Save. 	Please see Goals for more information on creating Goal frameworks.

Assign Roles	<p>Allows you to assign roles with permissions (access rights) to the audience members.</p> <p>Tick the box along the role(s) you wish to assign to members of the audience and select the Assign selected role(s) to this audience button.</p>	<p>Please see Roles for more information on access rights.</p>
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Creating learning plans for audiences

The learning plan functionality within audiences provides audience members access to learning plan templates and the ability for administrators to automatically create learning plans for each audience member.

Once a learning plan template has been selected an administrator can specify whether the template should be used to create a draft or pre-approved learning plan. It is also possible to prevent new plans being created if the user already has a learning plan based on the selected template.



By linking [competencies](#) to [positions](#) and [organisations](#) and creating a [learning plan template](#) which is set to automatically assign competencies (and their [linked courses](#)), an administrator can leverage the audiences functionality to automate the creation and population of learning plans for all learners.

To assign or create a learning plan for an audience:

1. Select the **Learning plan** tab within the selected the audience.
2. Select the **Plan template** from the dropdown list.
3. Choose which types of audience members (if any) should not have a learning plan automatically generated for them via the
 - a. *Who have an existing manually created plan based on this template* - If a user has a plan based on this template that was manually created by them or their manager then they will not get a new plan created.
 - b. *Have an existing automatically created plan based on this template* - If a user has an automatically created plan based on this template then they will not get a new plan created.
 - c. *Have a completed plan based on this template* - If this option is selected then users who have a completed plans based on this template will not have a new template created.
4. Select **Create new plan as** *Draft* or *Approved*.
5. Choose to **Automatically create a new learning plan for every new user who becomes a member of this audience** if new users who are dynamically added to the audience should also have a learning plan created automatically.
6. Click **Save and create plans**.
7. A confirmation of the number of learning plans being created will be displayed and a **History** of the learning plans created will be displayed.



If the **Exclude users who** setting has **have an existing, automatically created plan based on this template** enabled, the automatic creation of learning plans will not be available.

Example Dynamic Audience

OVERVIEW EDIT DETAILS RULE SETS MEMBERS ENROLLED LEARNING LEARNING PLAN GOALS ASSIGN ROLES

Create learning plans for users in this audience
This page allows you to automatically create learning plans for all users currently assigned to this audience.

Plan template

Exclude users who

have an existing, manually created plan based on this template
 have an existing, automatically created plan based on this template
 have a completed plan based on this template

Create new plans as

Dynamic creation Automatically create a new learning plan for every new user who becomes a member of this audience

History
Nothing to display

Duplicating an audience

An existing set or dynamic audience can be duplicated in order to create another audience based on similar settings or rule sets.

1. Select *Site administration > Audiences*

2. Select the corresponding **Duplicate** icon () in the **Actions** column against the selected audience.
3. The message **Do you really want to create a copy of the audience "[audience_name]"?** is displayed.
4. Select **Yes** to duplicate or **No** to cancel.

Deleting an audience

1. Select *Site administration > Audiences*.
2. Select the corresponding **Delete** icon () in the **Actions** column against the selected audience
3. The message **Do you really want to delete the audience "[audience_name]"?** is displayed.
4. Select **Yes** to duplicate or **No** to cancel.

Deleting users of an audience via bulk action

1. Copy the audience ID number (this can be found/created under the **Edit details** tab of an audience).
2. Navigate to *Site administration > Users > Bulk user actions*.
3. Select **Show more** under **New filter**.
4. Insert the Audience ID into the Audience ID field (with the dropdown set to **is equal to**).
5. Select **Add filter** at the bottom of the list.
6. Select **All filtered** in the **Available users** column and then add to selection.
7. Set **With selected users..** to **Delete**.
8. Select **Go**.
9. Confirm and select **Delete**.

Audience global settings

Audience global settings allows you to set the site wide alert and dynamic audience membership options used for audiences.

Alert options

Audiences alert settings allows a user with the appropriate permissions to specify the alert options that are available to users on the Audience edit page. This setting affects all **Audience** edit pages. When multiple options are selected the user can choose their preferred options from the alert dropdown menu.

Choose from:

- **Do not send alerts.**
- **Send alerts to affected members only.**
- **Send alerts to all members.**

Apply dynamic audience membership changes in background

Dynamic audience membership needs to be updated after audience rule changes are approved, which can take some time to complete. When checked, updates will be scheduled to occur as a background task. If unchecked, updates will occur immediately which will require the user who is approving the changes to wait for the update to complete.