

# 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 feature also allows each group to be assigned to a limitless number of courses, programs, and certifications. Audiences are 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.

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

## 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**.



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

### 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.

## 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**.



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 three 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**.

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

## 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.
  - **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.

## Enrolled learning

1. Select the *Enrolled learning* tab for the audience.
2. Select **Add courses**, **Add programs** or **Add certifications** to add courses, programs or certifications to the enrolled learning list.
3. Select the applicable course, program, or certification name(s).
4. Select **Save** when all courses, programs and certifications have been chosen.
5. The selected items have now been added to the enrolled list. You can remove a course or program from the list by selecting the **delete** icon in the *Actions* column.

## Visible learning

1. Select the **Visible learning** tab for the audience.
2. Select **Add courses**, **Add programs** or **Add certifications** to add courses, programs or certifications to the visible learning list.
3. Select the applicable course, program, or certification name(s).
4. Select **Save** when all courses, programs and certifications have been chosen.
5. The selected items have now been added to the visible learning list and will be visible in the course catalogue to all members of this audience. You can remove an item from the list by selecting the **delete** icon in the **Actions** column.

## Learning plan

It is possible to create new learning plans for audience members. The learning plan template can be chosen and whether the template will be created as a draft or already approved. It is also possible to prevent new templates being created if the user has already got a learning plan based on the selected template.

1. Select the **Learning Plan** tab for the audience.
2. Select the **Plan template** from the dropdown list.
3. Select **Exclude users who**:
  - a. Who have an existing manually created plan based on this template.
  - b. Have an existing automatically created plan based on this template.
  - c. Have a completed plan based on this template.
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.



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

If a user is removed from the audience any created learning plans will remain.

6. Click **Save and create plans**. A confirmation of the number of learning plans being created will be displayed and a history of the learning plans created will be displayed.

Learning Plan

OVERVIEW EDIT DETAILS MEMBERS EDIT 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

## Goals

Once you have [setup goals](#) on your Totara Learn site, you can then assign these to a particular audience. This means that everyone in that audience will be given the goal to achieve.

To assign a goal to an audience:

1. Go to the **Goals** tab.
2. Click the **Add Goal** button.
3. 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 look up a particular goal.
4. Once you have chosen the goal(s) you wish to add click **Save**.

## Assign roles

You can assign system roles to an Audience. This means that the role assigned will apply to all members of that audience in the system context i.e. across the whole site. You can read more about [System roles](#) on the Roles page.

To assign a system role to an audience:

1. Go to the **Assign Roles** tab.
2. Tick the box along the role(s) you wish to assign.
3. Click the **Assign selected role(s) to this audience** button.

## Duplicate an audience

An existing audience group can be duplicated. This allows you to use the rules and enrolled learning list to create another audience group.

1. Select *Site administration > Users > Accounts*.
2. Select **Audiences**.
3. The audience management page appears and any audiences already set up are displayed here.
4. Find the audience you wish to duplicate in the list; select the **duplicate** icon in the **Actions** column.
5. The message **Do you really want to create a copy of the audience '[audience\_name]'?** is displayed. Select **Yes** to duplicate. Select **No** to cancel.

## Delete an 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.
4. Find the audience you wish to delete in the list. Select the **delete** icon in the **Actions** column.
5. The message **Do you really want to delete the audience '[audience\_name]'?** is displayed. Select **Yes** to duplicate. Select **No** to cancel.

## Nested audiences

Nested audiences allow you to base a dynamic audience on one or more other audiences using the **Audience member** rule. This appears under the **Audience** heading in the normal **Add rule** dropdown menu.

### Example:

If you had Audience 1 consisting of users A, B and C and Audience 2 consisting of users C, D and E you could create a new audience:

Rule: Member of 'Audience 1', 'Audience 2' (select multiple in the dialog).

This would give you an audience with users A, B, C, D and E.

Or you could create two separate rules (within a single rule set):

Rule 1: Member of 'Audience 1'.

AND:

Rule 2: Member of 'Audience 2'.

This would require the user to be in both audiences, so the new audience would only match user C.

If you have an audience that users other rules, and you want to add the members from one (or more audiences) to that group you would do it like this:

Rule 1: User is a Manager.

OR:

Rule 2: Member of Audience 'Audience 1'.

This one would give you every manager in your site, plus the users in audience 1 (whether they are a manager or not).

If you want to exclude an audience even if they meet the other criteria, you need to use 'AND' between rules and the 'NOT' operator in the rule:

Rule 1: User is a Manager.

AND:

Rule 2: NOT a Member of Audience 'Audience 1'.

This would give you every manager, except the managers in Audience 1.

If you need something more complex it may be possible using rule sets to put together sets of rules, and/or multiple levels of nested audiences.


## Finding audiences

When a site has a large number of audiences, keywords can be entered into the Search box to search for or filter all of the available audiences including category audiences.



Category: Miscellaneous: available audiences (1)

All audiences System audiences Category audiences Add new audience Upload audiences

Search by

Audience Name  contains

Show none


Audience Name	ID	No. of Members	Type	Start date	End date	Status	Category	Actions
Category audience	ALX0005	0	Set			Active	Miscellaneous	 

## Audience global settings

Audience global settings allows you to set the global alert options used for audiences.

### Audience global settings

#### Global settings

Alert options 

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



Learn more and try it for yourself in the [Audiences course](#) on the Totara Academy.