Audience rules

When creating dynamic audiences you can use audience rules to determine which users are added and removed from your audience.

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

> ⚠ 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 rule set)
- 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 rule set has its own separate logical operator to indicate the relationship between the rules within that rule set.

Adding rule sets

When adding or editing a dynamic audience you can create rule sets by following these steps:

1. From the **Rule sets** tab select the **Add rule** dropdown menu.
2. You can now select the rule you wish to add to the audience group.
3. Set the rule options as required and select **Save**.
4. When a rule has been added to the first rule set, 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
5. 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.

Examples of date rules

This is an example of using a date-based rule set to add users to your audience. In the example below the rule being used is the **System access** rule for **Last login date**.

For this example you have the following user values:

Username	Last login date
user 1	1 Jan 2017
user 2	3 Jan 2017

Username	Last login date
user 3	4 Jan 2017
user 4	5 Jan 2017

You set up an audience rule set of: **Before** a selected date of **2 Jan 2017**.

The results are that only one user would be added:

Username	Last login date
user 1	1 Jan 2017

Taking the same original data, let's now imagine that the current date is 5 Jan.

You set up a rule set of: **Before** the **previous 2** days.

The result would still be one user:

Username	Last login date
user 1	1 Jan 2017

So instead you set up a rule of: **Within** the **previous 2** days.

The results are now three users because of the change of rule from 'before' to 'within':

Username	Last login date
user 2	3 Jan 2017
user 3	4 Jan 2017
user 4	5 Jan 2017

As another example, using the same original data, the current date is 1 Jan 2017.

This time you set up a rule: **Within** the **upcoming 2** days.

You would get a result of two users added to the audience:

Username	Last login date
user 1	1 Jan 2017
user 2	3 Jan 2017

If instead you set the rule to: **After** the **upcoming 2** days.

In this case you would still get two users, but they would be different users because of the rule change from 'within' to 'after'.

Username	Last login date
user 3	4 Jan 2017
user 4	5 Jan 2017

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 of nested audience

If you had Audience 1 consisting of users A, B and C and Audience 2 consisting of users C, D and E you could utilise these audiences in rule in a number of ways.

You could create a new audience using the rule: **Member of 'Audience 1', 'Audience 2'** by using the **Member of audience** rule and then selecting 'Audience 1' and 'Audience 2' from the dialog box.

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

Alternatively, 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 uses 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.

Available rules

User Profile Fields rules

> ⊕ Textarea custom fields are not supported due to performance implications and search complexity e.g. images can be uploaded, HTML input, etc.

Rule	Function	Examples
ID number	Select if the user's ID number 'contains', 'does not contain', 'is equal to', 'starts with', 'ends with', 'is empty', or 'is not equal to' a specific value. Use a comma-separated list to enter multiple values.	In some cases, you may want to code your users' ID numbers so that you can create audiences based on them. For example, you could have the ID numbers for learners based in the UK to end with '44'. In this case, you would set a rule specifying 'ends with' and '44'.
Username	Select if the user's username 'contains', 'does not contain', 'is equal to', 'starts with', 'ends with', 'is empty', or 'is not equal to' a specified string of characters. Use a comma-separated list to enter multiple strings.	In some cases, you may want to code your users' usernames so that you can create audiences based on them. For example, you could add the prefix 'nz_' to all of your users based in New Zealand, then set a rule specifying 'starts with' and 'nz_'.
Email address	Select if the user's email address 'contains', 'does not contain', 'is equal to', 'starts with', 'ends with', 'is empty', or 'is not equal to' a specified string of characters. Use a comma-separated list to enter multiple strings.	You may wish to exclude users with specific email addresses. For example, if you only wanted users with a specific company email to access a certain set of training, you could set a rule that selects users whose email address contains '@examplecompany.com'.
Language preference	Select if the user's preferred language is 'equal to' or 'not equal to' any of the languages on your system.	If a specific set of courses is only available in a specific language (Spanish, for example), you may want to set a rule for an audience to ensure that only Spanish-speaking users were enrolled in the courses or programs.

First name / Last name	Select if either the user's first name or last name 'contains', 'does not contain', 'is equal to', 'starts with', 'ends with', 'is empty', or 'is not equal to' a specified string of characters. Use a comma-separated list to enter multiple strings.	If users have not provided their name, you may want to exclude them from certain audiences. If you wanted to exclude anonymous users, you could set up first name and last name rules specifying 'is empty'. You could then use an Audience member rule to assign the learning only to users who are not part of this audience.
City / Country	Select if either the user's city or country 'contains', 'does not contain', 'is equal to', 'starts with', 'ends with', 'is empty', or 'is not equal to' a specified string of characters. Use a comma-separated list to enter multiple strings.	You may have courses or programs that only need to be completed by users in certain countries, or even specific offices. For example, you could set a rule that the user's city must contain 'London'.
Institution / Department	Select if either the user's institution or department 'contains', 'does not contain', 'is equal to', 'starts with', 'ends with', 'is empty', or 'is not equal to' a specified string of characters. Use a comma-separated list to enter multiple strings.	You may need to set up audiences based on your institutions or departments. For example, if you had a program that all users except for those in the Finance and Legal departments need to complete, you could set a rule that the department field 'is not equal' to 'finance,legal'.
User is suspended	This allows you to select 'yes' or 'no' for whether the user is suspended or not.	You may wish to exclude suspended users from your dynamic audience to ensure that only active users are assigned.
Tenant	Select if the user belongs to a specific tenant by choosing 'Equal to' or 'Not equal to', then choose a tenant or multiple tenants.	You may wish to create a dynamic audience so that you can assign users to a course while excluding users from a specific tenant.
Time created date	Select if the user's account was created before, on, or after a specific date or relative days.	You may want to introduce a user to specific induction training or stagger their enrolment onto training relative to when they start as a member of the organisation or to prompt re-engagement for existing employees.

All Job Assignments rules

Rule	Function	Examples
Titles	Select if the user's title 'contains', 'does not contain', 'is equal to', 'starts with', 'ends with', 'is empty', or 'is not equal to' a specified string of characters. Use a comma-separated list to enter multiple strings.	You may want to create an audience of users with similar roles - for example, you might want to include a range of different advisor roles from different departments or even organisations. In this case you could set a rule that the user's title must contain 'Advisor'.
Start dates / End dates	This allows you to select users based on their start or end date of any of their job assignments. Select the first radio button to choose if the assignment date is 'before and on' or 'on and after' a specific time and date using the dropdown lists. Select the second radio button to choose if the assignment date is 'before previous', 'within the previous', 'within the upcoming', or 'after the upcoming' number of days.	In some cases, you may want to create an audience of users who have started or ended a job assignment in a specific time period. For example, if you needed to select all users who had taken on a managerial role in the last three months you could first set a rule to select users with management-related job assignments, then set a rule specifying that the start date should be 'on and after' and '90 days'.
Position	This allows you to select a position or multiple positions from your Position Hierarchy. To select the position either click through the Position Hierarchy to find the position(s) or use the search tab. If there are more than 100 positions in your hierarchy structure you need to search for the position(s). Click the position(s) to select. Set if the user's positions needs to be 'Equal to' or 'Not equal to' the selected position and set whether you wish to include child positions e.g. positions appearing below the selected position in the hierarchy structure.	You might want to include or exclude users with a specific position from an audience. For example, if you know that Health and Safety Officers are required to complete advanced training, you could exclude them from an audience for assigning general health and safety training. In this case you could select the relevant positions and specify 'not equal to'.
Position Names / Position ID Numbers	Select if the user's position name (or the position ID number) needs to be 'Equal to' or 'Not equal to' the specific value. Use a comma-separated list to enter multiple values.	You may want to create an audience of users with similar roles - for example, you might want to include a range of different advisor roles from different departments or even organisations. In this case you could set a rule that the user's position must contain 'Advisor'.
Position Assignment Dates	This allows you to select users based on their position assignment date in any of their job assignments. Select the first radio button to choose if the assignment date is 'before and on' or 'on and after' a specific time and date using the dropdown lists. Select the second radio button to choose if the assignment date is 'before previous', 'within the previous', 'within the upcoming', or 'after the upcoming' number of days.	You may need to create an audience of users who have been assigned to a specific position in the last month. Firstly you would need to set a rule specifying the position, and then you would set a rule specifying that position assignment date must be 'within the previous' and '30 days'.

Position Types / Organisation types	This allows you to select users based on their position type or organisation type by selecting 'equal to' or 'not equal to' any position(s) from the list.	You may want to select users with a specific position type, rather than just the position. For example, if you already had an audience with a rule specifying the position 'Project Manager', you could add a second rule to select a position type from the list. In this case, you might want the audience to only include Project Managers with the type 'Agile'.
Position and Organisation custom fields	Certain custom fields added to organisation and position types will show as options for dynamic audience rules. The supported custom field types now are: • Checkbox • Date/time • Menu of choices • Multi-select • Text input	You may wish to group users based on a specific attribute of their assigned position or organisation.
Organisation	This allows you to select an organisation or multiple organisations from your Organisation Hierarchy. To select the organisation(s) either click through the Organisation Hierarchy to find the organisation(s) or use the search tab. If there are more than 100 organisations in your hierarchy structure you need to search for the organisations(s). Click the organisation(s) to select. Set if the user's organisations needs to be 'Equal to' or 'Not equal to' the selected organisation(s) and set whether you wish to include child organisations, e.g. organisations that appear below the selected organisation(s) in the hierarchy structure.	You could use this rule to set up audiences based on your organisations. For example, if you had an organisation for your EMEA office you could set up the organisation rule and choose the EMEA office from the list.
Organisation Names / Organisation ID Numbers	Select if either the user's organisation name or organisation ID number 'contains', 'does not contain', 'is equal to', 'starts with', 'ends with', 'is empty', or 'is not equal to' a specified string of characters or value. Use a comma-separated list to enter multiple strings or values.	You can use these rules to narrow down users based on their organisations. For example, you could select only users with 'Europe' in their organisation name by entering 'contains' and 'Europe'. This would include users whose organisations were 'France (Europe)', 'Germany (Europe)', and so on.
Managers	Select the manager(s) name from the list. If there are more than 100 managers you need to use the search tab to locate the manager(s). Select if the user 'reports to' or 'reports directly to' the selected manager(s).	You might need to assign learning to users who report to specific managers who have requested additional training for their teams. In this case you could select the relevant managers and select 'reports directly to' from the dropdown.
Has direct reports	Select if the user has direct reports in any of their job assignments and their total number of direct reports is 'none' or 'at least', 'no more than', or 'exactly' a specific number of people.	You may want an audience to comprise users who have some managerial responsibilities so that you can assign learning related to mentoring or managing a team.
Has indirect reports	Select if the user is a manager with indirect staff in any of their job assignments and their total number of indirect reports is 'none' or 'at least', 'no more than', or 'exactly' a specific number of people.	You may need to provide specific dashboard content or information to managers of managers or direct specific training to managers of managers.
Has temporary reports	Select if the user is a manager with temporary staff in any of their job assignments and and their total number of direct reports is 'none' or 'at least', 'no more than', or 'exactly' a specific number of people.	You may want people who have been temporarily assigned as managers unexpectedly or are temporarily acting in a manager's role who is on leave, to fulfil a manager's roles and tasks.
Has appraisees	Select if the user has appraisees in any of their job assignment and the total number of their appraisees if is 'none' or 'at least', 'no more than', or 'exactly' a specific number of people.	You may want to direct training to anyone who is an appraiser in your organisation.
ID number	Select if the user's job assignment ID number 'contains', 'does not contain', 'is equal to', 'starts with', 'ends with', 'is empty', or 'is not equal to' a specific value.	You may want to push training or performance activities to staff based on specific roles.

Learning rules

Rule	Function	Examples

Course completion / Program completion	When using this rule a list of available courses or programs appears. Select the required course(s) /program(s) from the list and set if the user needs to complete all or any of the courses or programs selected.	You may need to set up an audience of users who have completed a specific course or program. For example, you may want to create an audience for users who have completed a beginner first aid course, so that you can assign them to an advanced first aid program.
Course completion date / Program completion date	When using this rule a list of available courses /programs appears. Select the required course(s) /program(s) from the list and set if the user needs to complete the selected courses or programs before or after the specified date.	You may want to create an audience based on when learners completed a specific course or program. For example, you could assign refresher learning to learners who completed a course over two years ago by selecting the course and 'before previous 730 days'.
Course completion duration	When using this rule a list of available courses appears allowing you to select the required course (s) from the list and set if the user needs to complete 'less than' or 'more than' the number of days set.	In some cases, you may find it useful to create audiences based on how much time has passed since users completed a specific course. For example, you could assign refresher learning to any learners who completed a course more than a year ago if you wanted them to complete a newer and more relevant course.
Program completion duration since assignment / Program completion duration since started	When using this rule a list of available programs appears allowing you to select the required program (s) from the list and set if the user needs to complete the program(s) in 'less than' or 'more than' the number of days set from either being assigned to the program or from starting the program.	You may want to create an audience for learners who took a certain amount of time to complete a specific program. For example, if you had a program which learners were required to complete within a year of being assigned to the program, but you knew some learners had not completed the program within the allowed time, you could set up an audience to target these users. In this case you would select 'more than' and '365 days'.
Historic course completion	When using this rule, a list of available courses appears. Select the required course(s) from the list and set if the user needs to have completed all or any courses, or has not completed all or any courses selected from the list. The completion will be based on historic (archived) records.	You may want to assign users to a certification based on their historic completion of courses within the certification.
Historic course date	When using this rule, a list of available courses appears. Select the required course(s) from the list and set if the user needs to have completed the selected courses by a certain date or relative day.	You may want to enrol a user into a specific course one year after they have previously completed another course.
Course enrolment	Select users who are, or who are not, enrolled in a specific course.	You may want to enrol a group of people who are not already enrolled in the course.
Program assignments	Select users who are, or who are not, assigned to a specific program.	You may want to enrol or suggest courses to an audience who have completed a specific program.

Audience rules

Rule	Function	Examples
Audie nce memb er	When using this rule a list of existing audiences appears allowing you to select the required audience(s) from the list. You can then select if users are 'in audience(s)' or 'not in audience(s)'.	You may want to create an audience based on the audiences in which users are already enrolled - this can be particularly useful when creating an audience with multiple rules. For example, you may want to create an audience for members of a 'Finance employees' audience who are also based in the United States (using the Country rule).

System rules

Rule	Function	Examples
First login date / Last login date	These rules allow you to select users based on their first or last login date. Select the first radio button to choose if the login date is 'before and on' or 'on and after' a specific time and date using the dropdown lists. Select the second radio button to choose if the login date is 'before previous', 'within the previous', 'within the upcoming', or 'after the upcoming' number of days.	You may want to assign refresher learning to users who haven't used the system in a while. For example, you could use the 'Last login date' rule and select 'before and on' 31 December for the previous year, meaning any users who haven't logged in for the current calendar year will be added to the audience.