TOTARA:
CREATING A DYNAMIC AUDIENCE

This is a transcript of a video on the Totara Academy

WELCOME TO THIS VIDEO ON CREATING DYNAMIC AUDIENCES IN TOTARA.

In a dynamic audience, membership is based on a set of rules. If a user in the system meets the criteria, they are automatically added to the audience. For example, an audience could be made up of users who have completed a certain course, or who have a specific location or position. The combinations are almost endless!

If you've watched the video on how to create a set audience, you'll know that to add an audience you go to the quick access menu and select **Audiences**.

Here you can see a list of the audiences that already exist in my system.

I'll choose to add a new audience.

I'll give my audience a **Name** and change the **Type** to **Dynamic**.

I'm happy that this audience will exist at system level so, I'll just give the audience a **Description** for other administrators and then save my changes.

I can also time limit this audience by adding start or end dates. This is a useful feature if you want to prevent access to a system feature and then reveal it at a certain time – for example, you might create a dashboard for your users which you only want them to see for a certain period.

You can also decide whether you want to notify users that they have been added to your audience using the Alerts field and then save my changes.

We're taken straight to the **Rule Sets** tab, which is where you decide the criteria for membership of the audience.

First, you can decide whether users are automatically added and removed from the audience based on these rules. For example, I might decide that once users are a member of the audience they should always stay that way, in which case I'd deselect this checkbox.

Membership can be based on meeting one or multiple rules which are grouped in sets. So here you should also decide whether users need to meet all the rule sets (in which case select AND), or only one (in which case select OR).

So now it's time to add my rules. As you can see in this drop-down, you can base your rules on the different information held about users in your site. This includes everything from profile information such as their city or country, to job assignments, previous learning, membership of another audience or even when they logged into the system. If you have added custom profile fields on your site, they can also be used as audience rules, giving you a huge amount of flexibility.

So, for example I could say that everyone with the position of Project Manager who has completed the Prince 2 course is in my audience. Or everyone based in the UK who has logged in in the last year. Or I might create an audience of Managers by choosing everyone who has direct reports or has temporary reports.

In my case, I'm creating an audience of certified engineers, which is engineers who have completed the Engineering program of courses and competencies.

So, I'll start by saying that members should have the position of Engineer.

My rule has been added here.

Next, I'll say that my engineers must have completed the Engineer program by selecting **Program completion** and choosing the program from the list.

Notice here that you can also choose to base membership on learners NOT having completed the learning. For example, this is really useful if you want to target learners who have not completed a piece of mandatory training.

In my case I want learners to have completed the program, so I'll now save.

You'll notice that my two rules are now shown as rule set number one, and I have the option to add a second rule set.

I also need to confirm whether users must meet all or only one of the rules in this set.

While this might sound complicated, it can be very powerful. It's worth spending time thinking about how you want to group your users to allocate learning, learning plans and performance management activities, and using the power of these options to do so.

I'm happy with my rules so I'll approve the changes in this warning at the top. This appears because changing a dynamic audience automatically affects its members. In this case, users who meet the criteria will be automatically added.

Now let's go and have a look at the **Members** of my new audience.

All users in the site who meet the criteria I've set have been added to my audience. This list is likely to change as other users meet the criteria.

My audience has been created and members added. The only task left is to decide how to use this audience. You can enrol the audience in learning, assign a learning plan template or even roles to the users in the audience from this screen.

This is covered in more detail in the video on adding a set audience.

End