

Pathway Target Audience Tab

Target Audience: Org Condition

The purpose of the Org Condition is to add a learner based on their location in the Organisation Structure.

Follow the steps illustrated in this section to add a learner based on the Org Condition.

The screenshot displays the 'Pathway Target Audience' interface. At the top, a blue informational box explains that radio buttons are used to select conditions for adding employees. Below this, four radio buttons are visible: 'Org' (selected and highlighted with a red box and a red circle with the number 1), 'Position', 'Employee', and 'Manual'. Underneath the radio buttons, the text 'Filter Status: Selection condition applied' is shown. A row of four buttons follows: 'Clear All Target Audiences' (dark blue), 'Send Notifications' (light blue), 'Refresh Target Audience' (dark blue), and 'Who is on the target audience?' (light blue). Below these buttons is a search bar with the label 'Search', a text input field, a 'Search' button with a magnifying glass icon, and a 'Clear' button with an eraser icon. At the bottom left, there are two buttons: 'Add' (dark blue) and 'Delete' (red). A yellow banner at the bottom of the interface contains a red circle with the number 2 and the text 'Nodes have been found for your search criteria .', indicating that search results are displayed.

1. Click on the **Org Condition radio** button.
2. Click on the **Add** button. The **Organisation Nodes** screen opens.



image not found or type unknown

3. Enter the **Org Name** you are looking for.

- Any of the other search fields can be used to locate the Org Node you are looking for.

4. Click on the **Search** button.

5. **Select** the **Org Node** you want the Target Audience to be applied to.

- Note that you can select **multiple** Org Nodes.

6. Click on the **Select** button to add the selected Org Nodes to the Target Audience.

7. Click the **Close** button to return the Target Audience tab of the Pathway.

Use the radio buttons to select which condition to use to add employees on the Target Audience. An employee can be included in the Target Audience based on Org OR their Position OR Employee Number OR by means of a manual Target Audience. If more flexibility is required, a combination of all of the conditions can be used to create the Target Audience for this pathway.

☒ Org ☐ Position ☐ Employee ☐ Manual

Filter Status: Selection condition applied

Clear All Target Audiences **Send Notifications** **Refresh Target Audience** Who is on the target audience?

8 9

Search **Q Search** **Clear**

Add **Delete**

Org Code	Org Name	Org Type	Org Path	Number Of Active Employees	Delete
2	Business Analysis	Channel Group	Signify Business Analysis	3	<input type="checkbox"/>

Add **Delete**

The selected **Org Node** will be displayed on the list screen.

8. Click on the **Refresh Target Audience** button to apply the change.

9. Generate the **Who is on target audience** report to **confirm** the change delivered the desired results.

Try It Out: Navigate to a Pathway Target Audience tab and select an Org Node to be added to the Org Condition.

Target Audience: Position Condition

The purpose of the Position Condition is to add a learner based on the Position have within the Organisation.

As all Positions are linked to a Job, the Job List is used to select the Positions linked to a Job.

Follow the steps illustrated in this section to add a learner based on the Position Condition.

Use the radio buttons to select which condition to use to add employees on the Target Audience. An employee can be included in the Target Audience based on Org OR their Position OR Employee Number OR by means of a manual Target Audience. If more flexibility is required, a combination of all of the conditions can be used to create the Target Audience for this pathway.

☒ Org ☒ **Position** ☐ Employee ☐ Manual 1

Filter Status: Selection condition applied

Clear All Target Audiences **Send Notifications** **Refresh Target Audience** Who is on the target audience?

Search **Q Search** Clear

Add **Delete**

2 Nodes have been found for your search criteria .

1. Click on the **Position Condition** radio button.
2. Click on the **Add** button. The **Job List** screen opens.



image not found or type unknown

- 3. Enter the details for the **JobTitle** you are looking for and click on the **Search** button.
- 4. **Select** the **Job Title** you want the Target Audience to be applied to.
 - Note that you can select **multiple** Job Titles.
- 5. Click on the **Select** button to add the selected **Job Title** to the Target Audience.
- 6. Click the **Close** button to return the Target Audience tab of the Pathway.

Use the radio buttons to select which condition to use to add employees on the Target Audience. An employee can be included in the Target Audience based on Org OR their Position OR Employee Number OR by means of a manual Target Audience. If more flexibility is required, a combination of all of the conditions can be used to create the Target Audience for this pathway.

☐ Org ☒ Position ☐ Employee ☐ Manual

Filter Status: Selection condition applied

Clear All Target Audiences

Send Notifications

Refresh Target Audience

Who is on the target audience?

1

2

Search

Q Search

Clear

Add

Delete

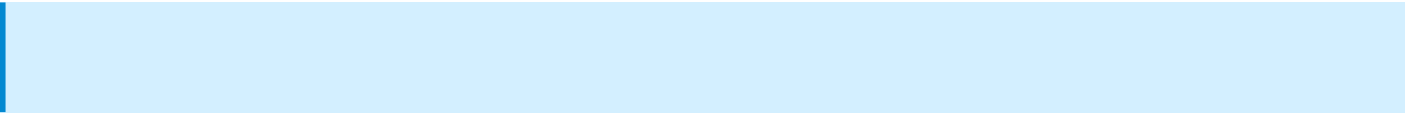
Job Code	Job Title	Number of Positions	Delete
751	Business Analyst	3	<input type="checkbox"/>

Add

Delete

The selected **Job Title** will be displayed on the list screen.

- 7. Click on the **Refresh Target Audience** button to apply the change.
- 8. Generate the **Who is on target audience report** to **confirm** the change delivered the desired results.



Try It Out: Navigate to a Pathway Target Audience tab and select a Job Title to be added to the Position Condition.

Target Audience: Employee Condition

The purpose of the Employee Condition is to add any learner within the Organisation.

Follow the steps illustrated in this section to add a learner based on the Employee Condition.

The screenshot displays a web interface for configuring a Target Audience. At the top, a light blue box contains instructional text: "Use the radio buttons to select which condition to use to add employees on the Target Audience. An employee can be included in the Target Audience based on Org OR their Position OR Employee Number OR by means of a manual Target Audience. If more flexibility is required, a combination of all of the conditions can be used to create the Target Audience for this pathway." Below this, four radio buttons are visible: "Org", "Position", "Employee", and "Manual". The "Employee" radio button is selected and highlighted with a red rectangle and a red circle containing the number "1". Below the radio buttons, the text "Filter Status: Selection condition applied" is shown. A row of four buttons follows: "Clear All Target Audiences" (dark blue), "Send Notifications" (light blue), "Refresh Target Audience" (dark blue), and "Who is on the target audience?" (light blue). Below these buttons is a search bar with the label "Search", a text input field, a dark blue "Q Search" button, and a light blue "Clear" button with a trash icon. Below the search bar are two buttons: "Add" (dark blue) and "Delete" (red). At the bottom, a yellow box contains a red circle with the number "2" and the text "Nodes have been found for your search criteria .".

1. Click on the **Employee Condition** radio button.
2. Click on the **Add** button. The **Employee Search** screen opens.

EMPLOYEE SEARCH

Search

Hide

☒ Current Employees

☐ Previous Employees

☐ All

3

Multiple Employee Numbers

EdithR
GouwsB
LawrensC

i

Single Employee Details:

Employee Number

Name

Surname

ID Number

4

5

Marili Schema

6

7

Search

Clear

Select

Close

Select	Employee Number	Surname	Name	ID number	E-mail address	Current Position	Location in organisation
<input checked="" type="checkbox"/>	MDP001	5	du Plessis	Marili		Business Analyst	Signify Business Analysis
<input type="checkbox"/>	MDP002		Du Plessis	Ruan		Business Analyst	Signify Business Analysis
<input type="checkbox"/>	MDP003		Kruidenier	Edelweiss		Business Analyst	Signify Business Analysis

3. Enter the details for the **Employee** you are looking for.

4. Click on the **Search** button.

5. **Select** the **Employee** you want the Target Audience to be applied to.

- Note that you can select **multiple** Employees.

6. Click on the **Select** button to add the selected **Employee** to the Target Audience.

7. Click the **Close** button to return the Target Audience tab of the Pathway.

Use the radio buttons to select which condition to use to add employees on the Target Audience. An employee can be included in the Target Audience based on Org OR their Position OR Employee Number OR by means of a manual Target Audience. If more flexibility is required, a combination of all of the conditions can be used to create the Target Audience for this pathway.

☐ Org ☐ Position ☒ Employee ☐ Manual

Filter Status: Selection condition applied

Clear All Target Audiences

Send Notifications

Refresh Target Audience

Who is on the target audience?

7

8

Search

Q Search

Clear

Add

Delete

Employee Number	Surname	Name	Email	Current Position	Location in organisation	Delete
MDP001	du Plessis	Marili		Business Analyst	Signify Business Analysis	<input type="checkbox"/>

The selected **Employee** will be displayed on the list screen.

7. Click on the **Refresh Target Audience** button to apply the change.

8. Generate the **Who is on target audience report** to **confirm** the change delivered the desired results.

Try It Out: Navigate to a Pathway Target Audience tab and select an Employee to be added to the Employee Condition.

Target Audience: Send Notifications

After the Pathway has all the required steps and is approved by Management, it is time to inform the learners that a new pathway is available to them. PTA001, the Pathway Target Audience email is sent from the Send Notifications screen.

Navigate to the Pathway

How did I get here? Administration Portal | e-Learning | Maintain Learning Pathway

Select the Pathway which the email will be sent for.

Modules ▾ Subgroup Reporting ▾ System Administration ▾ Admin Portal Log Out

PATHWAY NODE DETAIL (MDP001, MARILI DU PLESSIS)

Maintain TreeView / [Ref: 963] Signify Software Pathways Training / [Ref: 964] Signify Training / [Ref: 965] Signify LMS Showcase Pathway

Pathway Node Detail **Target Audience** Preview Learning Store

1
Employees loaded as part of any target audience (org, position, employee or manual) will be included in the final result set. If e.g. an employee is excluded because of a condition in the Manual target audience but included in the Employee Target Audience, the employee would be included in the final result set. Please note that all four target audiences work together to arrive at the final set.

Use the radio buttons to select which condition to use to add employees on the Target Audience. An employee can be included in the Target Audience based on Org OR their Position OR Employee Number OR by means of a manual Target Audience. If more flexibility is required, a combination of all of the conditions can be used to create the Target Audience for this pathway.

☒ Org ☐ Position ☐ Employee ☐ Manual

Filter Status: Selection condition applied

Clear All Target Audiences **Send Notifications** Refresh Target Audience Who is on the target audience?

2

Search **Q Search** Clear

Add **Delete**

No Nodes have been found for your search criteria .

Add **Delete**

Schema: [23] Marili Schema | Subgroup: All Employees V8.8 Copyright © 2019 Signify. All Rights Reserved.

1. Click on the **Target Audience** Tab.
2. Click on the **Send Notifications** button.

Send Notifications

Refresh the **Target Audience** before sending any notifications.

SEND NOTIFICATIONS

Notify employees that they are part of the target audience.
NOTE: If changes were made to the target audience, the target audience needs to be REFRESHED first before the newly added learners will appear in the list below.

Search

Q Search

3 Clear

Send To All

Send To Selected

Close

Select	5 Employee Number	Surname	Name	E-mail address	Current Position	Location in organisation
<input checked="" type="checkbox"/>	MDP001 4	du Plessis	Marili		Business Analyst	Signify Business Analysis

Send To All

Send To Selected

Close

3. Enter search criteria and click on the **Search** button if the notification.

4. **Select** the learners to whom the notifications need to be sent.

5. Click **Send To All** or **Send To Selected**

Notifications can **only** be **sent** to learners who have **valid email** addresses. If the learner has an invalid email address or if the email address is blank, the notification will not be sent.

Send To All

When Send To All is selected, the notification will be sent to all learners who form part of the Target Audience.

A confirmation prompt is displayed before the notifications are sent to all the learners.

Click on the OK button to send the notification to all learners on the Target Audience.

SEND NOTIFICATIONS

Notify employees that they are part of the target audience.

NOTE: If changes were made to the target audience, the newly added learners will appear in the list below.

shakespeare says

Are you sure you want to send the notification to all learners on this target audience?

OK

Cancel

Search

Search

Clear

Send To All

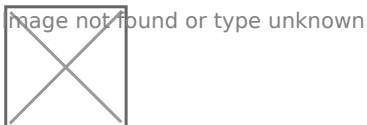
Send To Selected

Close

Send To Selected

When Send To Selected is selected, the notification will only be sent to the selected learners who are part of the Target Audience.

Once the notification is sent, click on the Okay button to return to the Pathway Target Audience tab.



Try It Out: Navigate to a Pathway and add yourself to the Target Audience. Refresh the Target Audience and send the notification to your own email address.

Revision #2

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