Targeting Notifications by Profile Fields
British Safety Council Health & Safety E-learning Platform

Introduction
As an administrator you have the ability to directly target groups of staff by the data held in their profiles.

Notifications can be targeted by:

- City/town
- Department
- Institution

For example you may wish the email notification text to differ depending on the recipient's department or you may have a local health & safety contact for each location and wish to include this specific information in notifications.

Customised profile fields
The profile fields on your platform may have different names. For example 'City/town' may have been renamed to 'Location' or 'Department' may have been renamed to 'Service'. If this is the case the instructions that follow will still apply. However, you will see different Send to options.

Accessing your notifications
You can access your notifications by going to **Administration** > **Settings** > **Manage notifications** and clicking on the **Edit** link next to the notification you wish to edit.

Figure 1 - Manage notifications screen

Targeting notifications

The **Manage notifications** screen consists of four sections:

1. The **Edit** section where you can choose the message subject, content, timings and recipient.

Figure 2 - The Edit section

2 – 4. Three **Send to** sections where you can choose the City/town, Department/s, and/or Location/s that the email will be sent to.

Figure 3 - The Send to options

How to target a notification

A notification will be sent **only** to the recipients whose profile data matches that of the items selected in the **Send to** options.

In order to target a notification to a particular group of users you would need to deselect all the options that do not apply. You can select or deselect multiple options at once by holding down the **ctrl** key while clicking.

Example: Sending an email to IT and Marketing staff only

In this example we are going to create a notification that will be sent to IT and Marketing staff only. To do this we would look in the **Send to department** section and deselect all the options we do **not** want to send this notification to, those being the **EMPTY FIELD**, **Finance** and **Operations** options. The only options left selected are now **IT** and **Marketing**. Therefore only staff in those departments would receive this notification. See figure 4 below for an illustration.
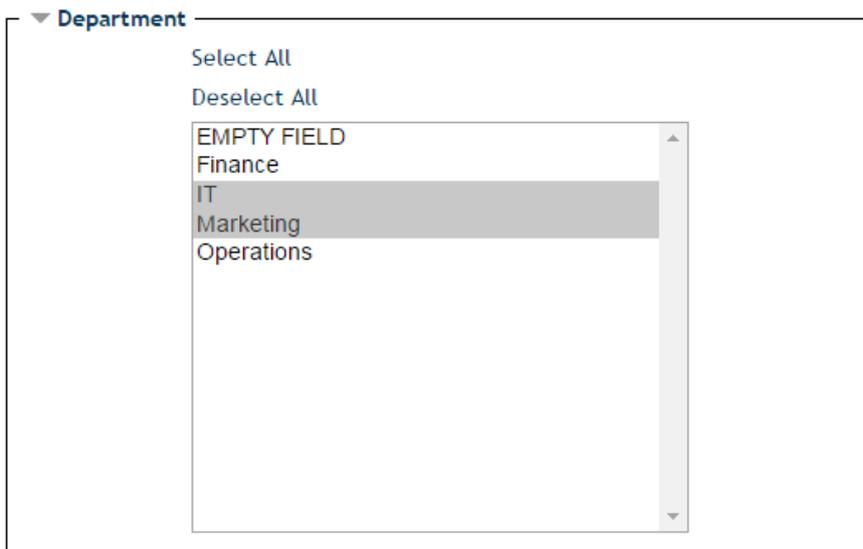

Figure 4 - IT and Marketing only

Example: Sending an email to London based staff only
Another example can be seen below (figure 5). In this example we only want this notification to be sent to staff that have London in their **City/Town** profile field.

Location

Important: This notification will only be sent to users who have the options you have ticked in their profile. To send this notification to all users make sure all the entries are selected.

Select All

Deselect All

EMPTY FIELD
Edinburgh
London
Manchester
na

As **London** is the only location selected, this notification will only be sent to users in London

Department

Select All

Deselect All

EMPTY FIELD
Finance
IT
Marketing
Operations

Institution

Select All

Deselect All

EMPTY FIELD
Alpha
Beta
Gamma

Figure 5 - Notification for London based staff

Tips

- You can select or unselect all options in a section by clicking **Select all** or **Deselect all**
- You can select/deselect multiple entries at once by holding down the **ctrl** key while clicking on options
- If you wish the message to be sent to users who may have no data in that particular field ensure the **EMPTY FIELD** option is selected in that section.
- Deselecting an option will prevent notifications being sent to users who have that data in their profile field regardless if any other selected options match their profile.
- You can create various versions of each notification to be sent to different sets of users by using the **Add new** option in **Administration** > **Settings > Manage notifications** (see figure 6 below for an illustration).
- When adding users who have a City/town, Department or Institution that has not been added before you will need to update your notifications to ensure these new values are selected.

Figure 6 - Adding a new notification