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Audience Targeting in SharePoint

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Relevant to SharePoint 2010, 2013 and Office 365



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What is Audience Targeting?

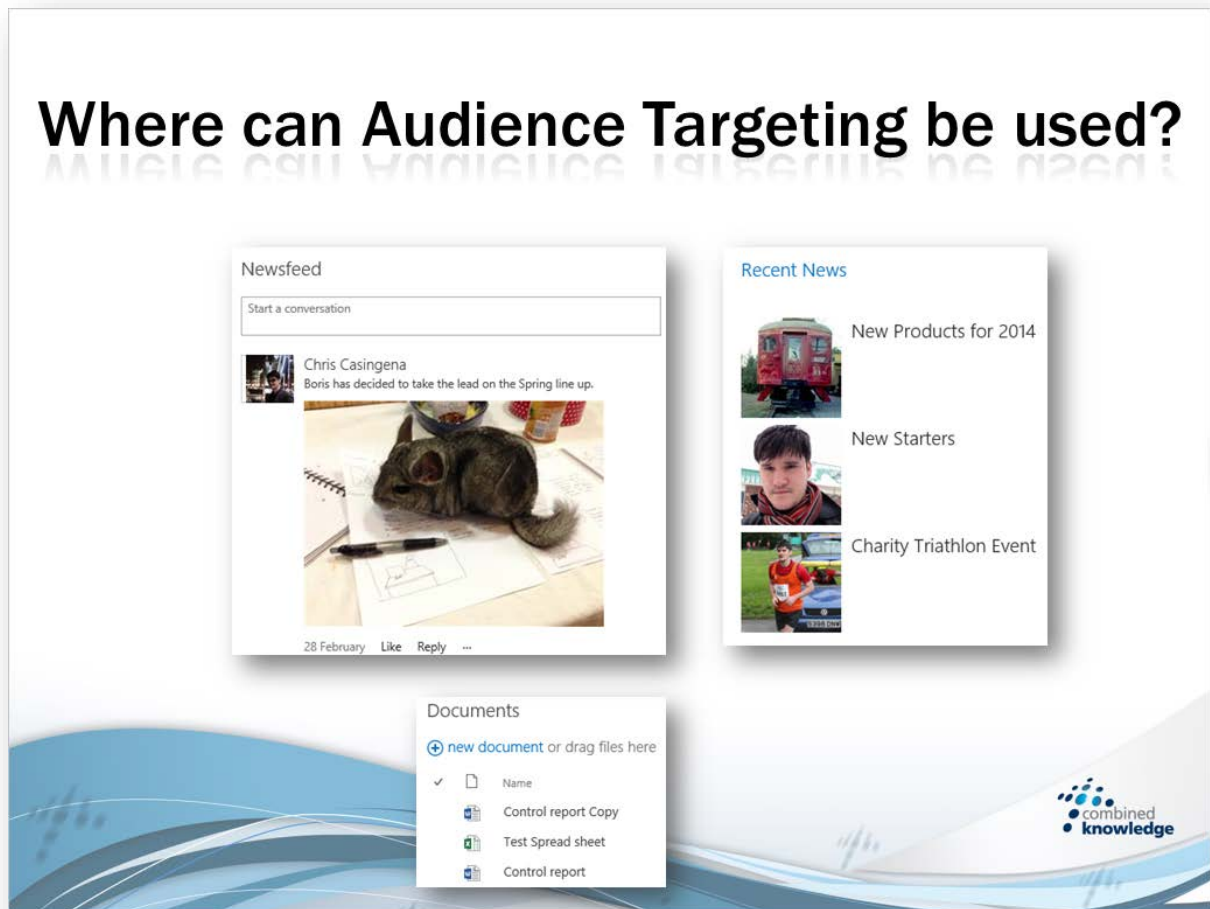


Audience targeting is the means of identifying appropriate content in SharePoint that is relevant to a certain group of users. For example, a large retail outlet has many stores across the world. Each store has regional offers and products that may not be relevant for another store. The stores all access SharePoint to view files and information on these products and promotions. The feedback is that stores are finding it hard to find content that is relevant for their region as all promotions and products are shown at once.

In this scenario, site owners may be tempted to create regional pages in SharePoint. The problem is that potentially a site owner may have to manage many pages, frequently to keep up with the retailer's yearly forecast.

It would be easier to maintain a single SharePoint page. Rather than displaying every promotion and product to every store we can simply target specific content at a store using audience targeting. This way every store accesses the same page however they all get a different and accurate experience based on their region.

Where can Audience Targeting be used?



Site owners may have seen options for audience targeting in a few locations. Firstly, the majority of web parts in SharePoint have an audience targeting option. Also Lists and Libraries have an option for audience targeting too. This allows an additional property field per item or file allowing you to target that content at a specified audience. Finally navigation links established within site settings have the ability to be audience targeted.

In the next sections we will be talking about these areas in more detail, including step by step demonstrations on how to achieve audience targeting for general web parts, lists and libraries using the content query web part and navigation.

Web Parts

The majority of web parts include an option for audience targeting. From there you are able to declare Global Audiences, Active Directory Security or Distribution Groups or SharePoint Groups. If you prefer you can also use a named account for example a user such as Alex Fox.

Each web part can have its own unique audience which can consist of more than one group of users. For example, the Marketing, Sales and Executives groups may all want to view a web part. So in this case all of these groups can be added as an audience to a single web part.

In the scenario we are discussing a site owner has set up the stores home page to include 4 Image Viewer web parts as shown on the right. These web parts are displaying different regional banners some of which must be hidden based on which user is signed into SharePoint.

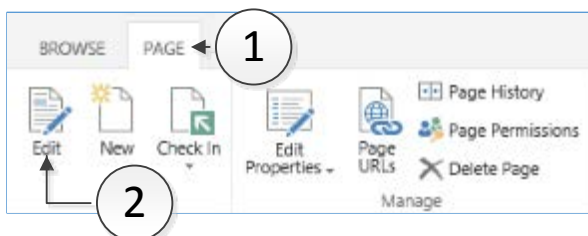
To start this process, the page must be in edit mode to access the Edit Web Part Properties menu. Also make sure you are aware of which audiences are available. In our scenario we have:

- g_scotland – A group containing all users based in Aberdeen and Edinburgh
- g_sales - A group at head office based in Sales
- g_marketing - The group in charge of the banners and promotions
- g_exec – Business executives who want to see all promotions

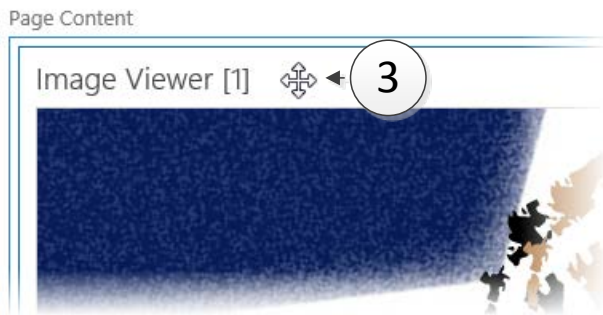


Once you understand which groups you will be using proceed with editing the page:

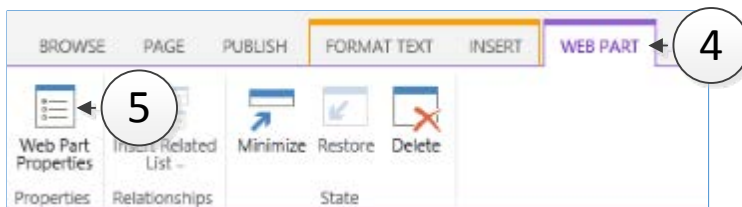
1. Navigate to your page and click on the **Page** tab
2. Next, click on **Edit**



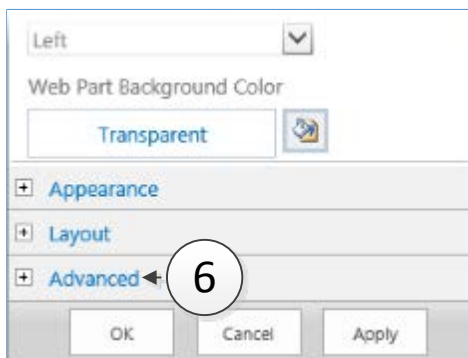
3. Click on a *web part* to select it



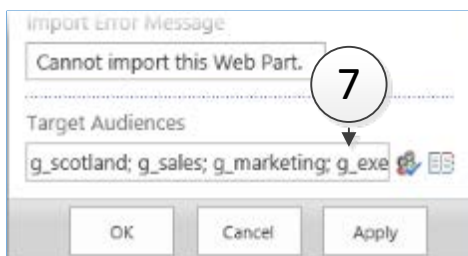
4. In the ribbon, click on the **Web Part** tab
5. Click on **Web Part Properties**



6. Expand the **Advanced** drop down in the right hand panel



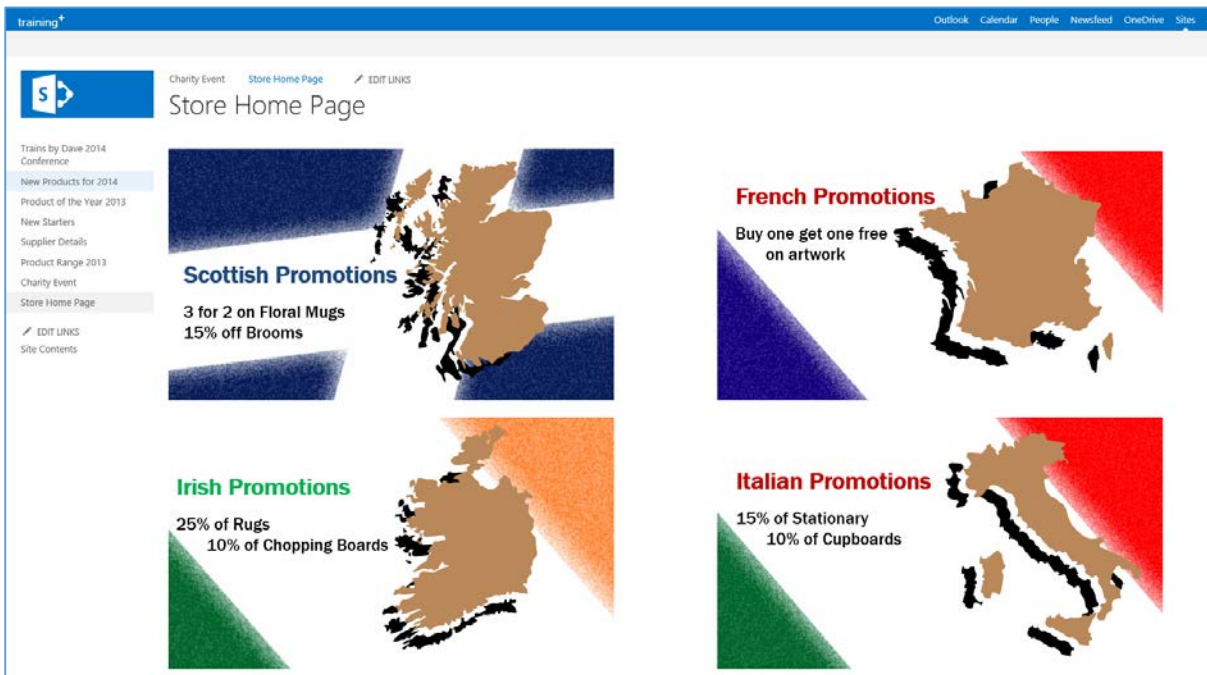
7. Enter in the name(s) of your **group(s)** or **user(s)** into the *Target Audiences* field



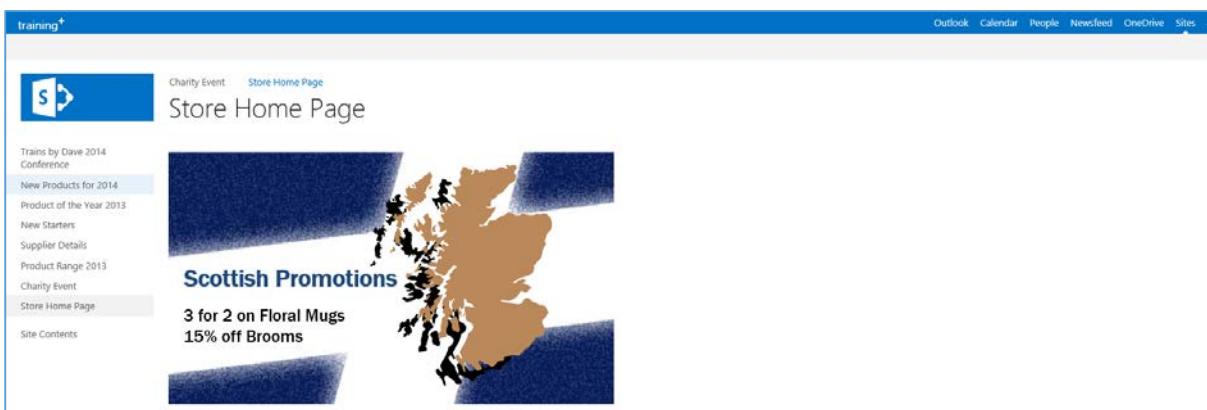
TIP: Separate groups by using a semicolon and a space, use the *Check Names* button to confirm your selection is valid. If you want to search for groups, use the *browse* button.

8. Click on **OK** to apply these settings and close the panel.
9. Make the same amendments with the correct groups to the other web parts and Save the page (you may need to check the page in before your changes are visible to others)

Below is the end result. The first screenshot is a member of the Execs group Steve Smith, viewing the Stores Home Page. You will notice that Steve can see all of the web parts. This is because the g_Execs group has been added to every audience targeted web part on the Stores Home Page.



Mark Summers, an employee at the Aberdeen store in Scotland is a member of the g_scotland group. To Mark, the page is excluding the Irish, Italian and French targeted web parts however, because Mark is based in Scotland the relevant web part is displayed through audience targeting. Applying this to many web parts will create a truly custom experience.



Lists and Libraries using the Content Query Web Part

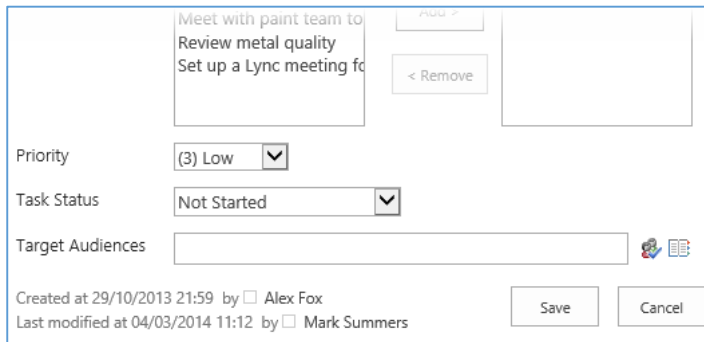
Lists and libraries have additional settings that are used for activating useful features such as versioning, ratings, metadata navigation and relevant to this white paper, audience targeting.

Enable Audience Targeting

Enabling audience targeting will create a targeting column for this list. Web parts, such as the Content Query Web Part, can use this data to filter list contents based on the user's context.

Enable audience targeting

The audience targeting option will enable a new field for your list items or files. It is here that you can declare your audiences in the same way that we add groups as an audience for web parts. As you can see below, audience targeting has been enabled for a task list. When editing a task a new *Target Audiences* field has been added.



Meet with paint team to
Review metal quality
Set up a Lync meeting fo

< Remove

Priority (3) Low

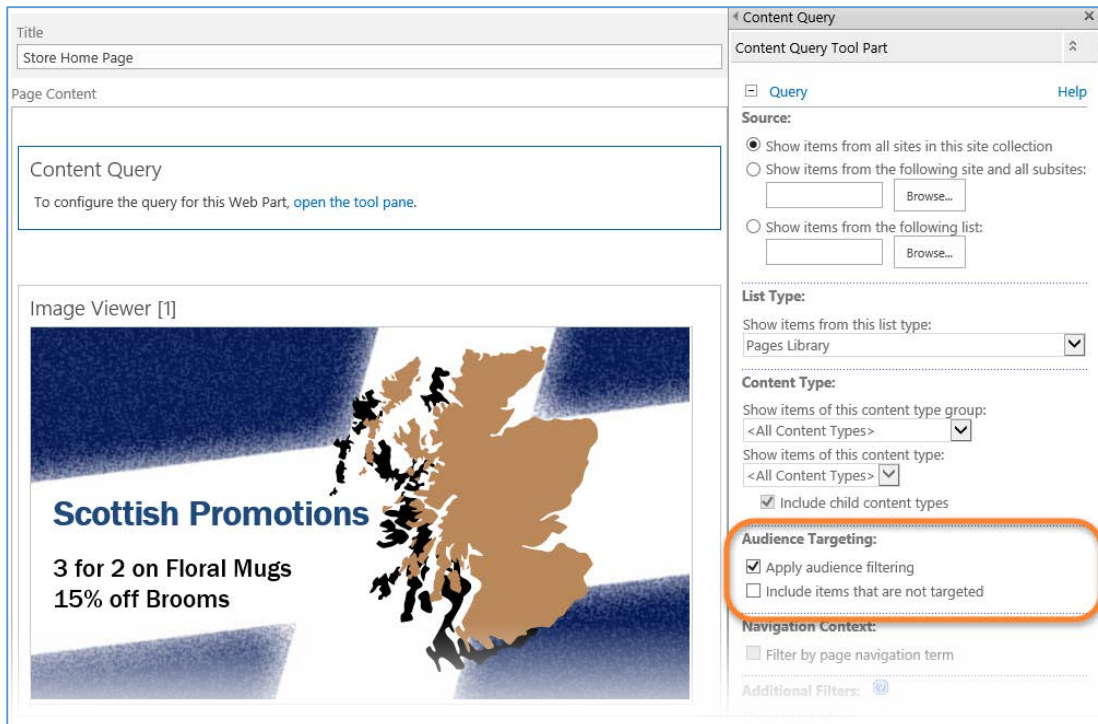
Task Status Not Started

Target Audiences

Created at 29/10/2013 21:59 by Alex Fox
Last modified at 04/03/2014 11:12 by Mark Summers

Save Cancel

This will not affect users that are viewing the library or list in SharePoint. This audience targeting method is meant to be used with the content query web part. This way users viewing the content through the web part will only see the files or items targeted at them.



Title: Store Home Page

Page Content: Content Query

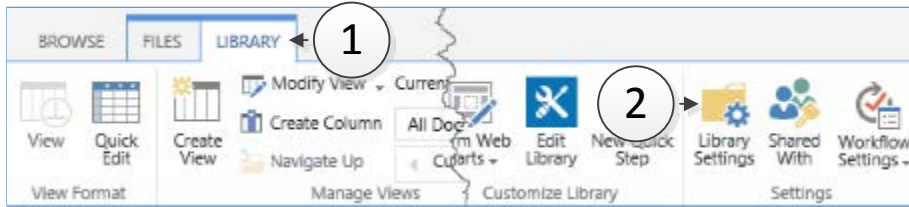
Image Viewer [1]: Scottish Promotions, 3 for 2 on Floral Mugs, 15% off Brooms

Content Query Configuration:

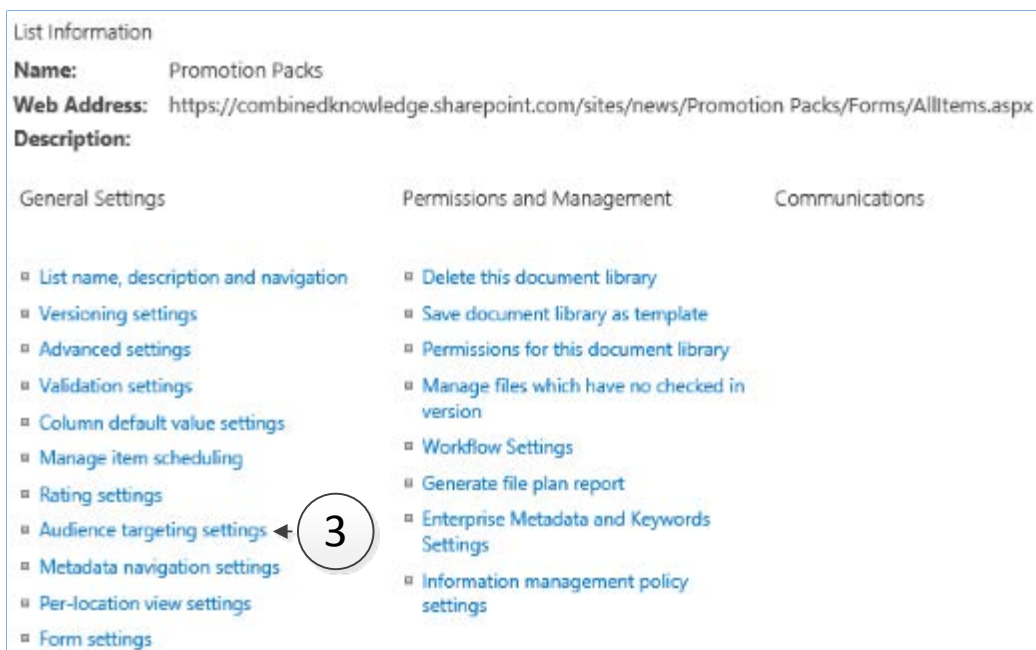
- Source:
 - Show items from all sites in this site collection
 - Show items from the following site and all subsites: [Browse...]
 - Show items from the following list: [Browse...]
- List Type: Show items from this list type: Pages Library
- Content Type:
 - Show items of this content type group: <All Content Types>
 - Show items of this content type: <All Content Types>
 - Include child content types
- Audience Targeting:**
 - Apply audience filtering
 - Include items that are not targeted
- Navigation Context:
 - Filter by page navigation term
- Additional Filters: [Add]

In this scenario our marketing team has created some PDF flyers for stores to print out and place on their advertisement stands. To avoid stores printing off the wrong flyers we will display all of marketing's flyers through a content query web part. Through audience targeting we can ensure that stores will only see flyers that are relevant to them. Please note that this option works with both lists and libraries.

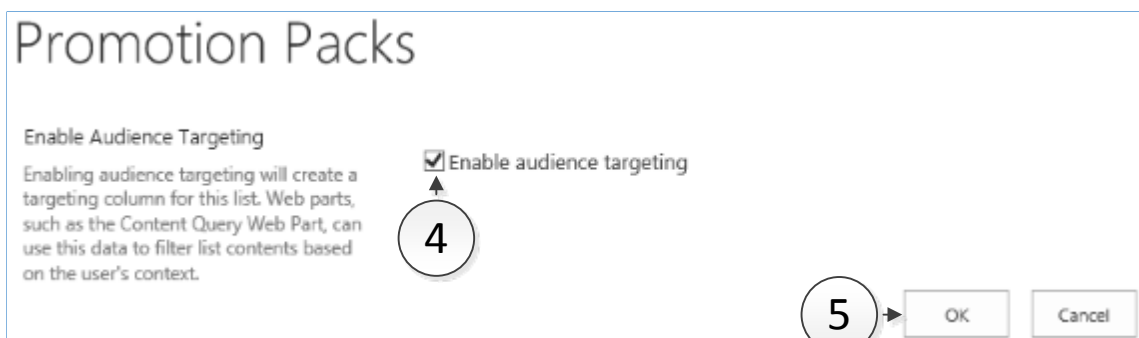
1. Navigate to a library that you wish to apply audience targeting to and click on the **Library** tab
2. Next click on **Library Settings**



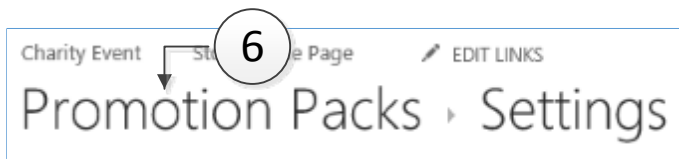
3. From the *General Settings* category, click on **Audience targeting settings**



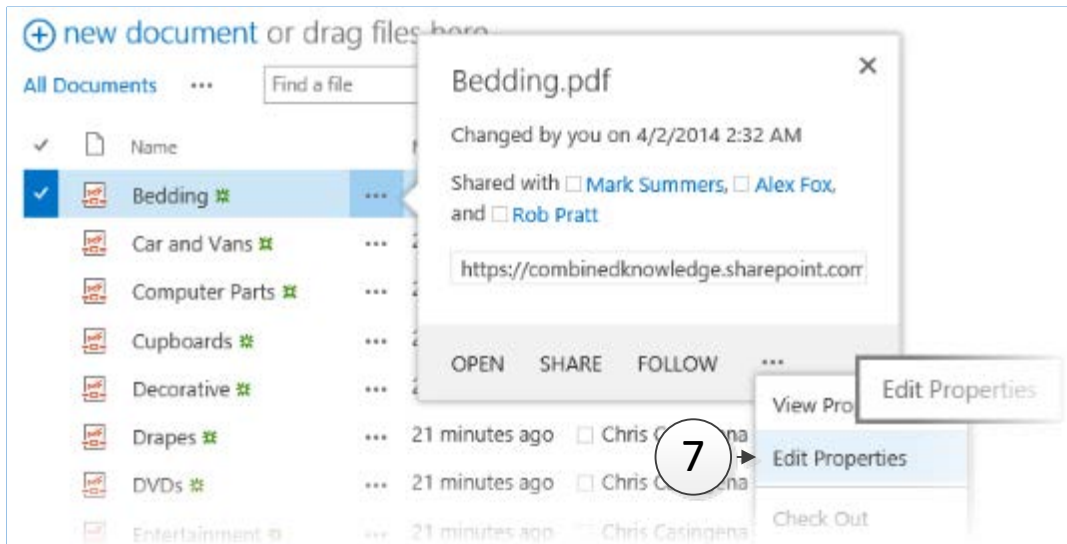
4. Place a **tick** in the *Enable audience targeting* tick box
5. Click on **OK** to apply this settings



- Use the *breadcrumb trail* to navigate back to your library



- Next choose **Edit Properties** for one of the files in your library



- You will have a new field called *Target audiences*, enter the groups or users here



- Click **Save** and repeat this for the additional files in your library

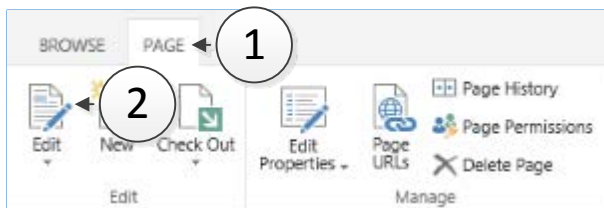
Now that the library has targeted content, it must be presented through the content query web part to enable the audience targeting feature. If an employee was to navigate to this document library, they would see all files based on their level of access. For example, an employee in a Scottish store would see files that are targeted at non-Scottish stores. Audience targeting does not change the way a library operates. As discussed earlier, it is a method for tagging documents and items with audiences for use with the content query web part. This web part comes with the publishing site infrastructure which is a feature that can be enabled at the site collection level.

If you do not have the content query web part you can request the publishing infrastructure feature to be enabled OR navigate to a site collection with this that is already using this feature. There is also a complementing site level feature as well. Is it

not a requirement to have the site feature *SharePoint Server Publishing* enabled to access the content query web part.

You can then target the web part at your library or list in another site. To set up this web part, try the following steps:

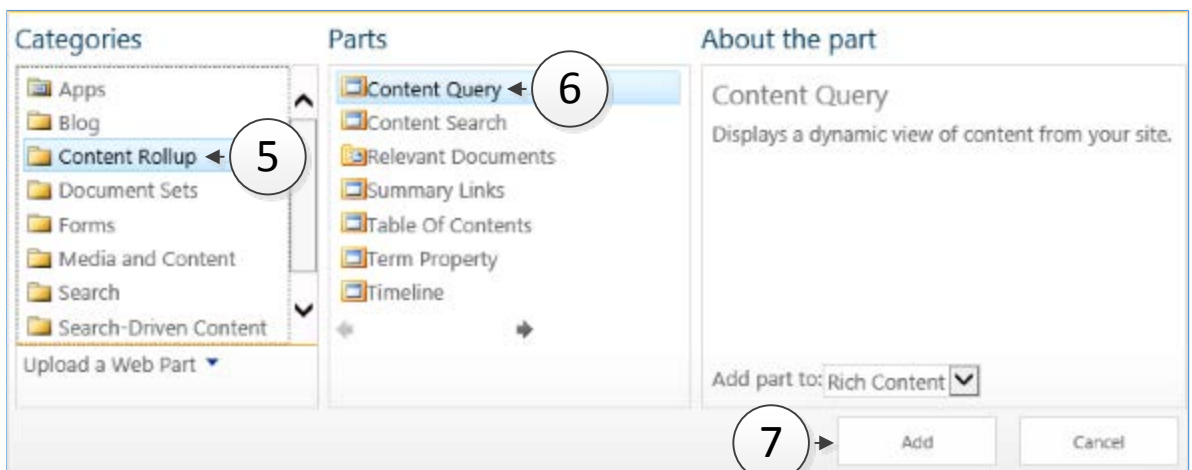
1. Navigate to a page that you wish to feature the targeted content on and click on the **Page** tab
2. Next click on **Edit**



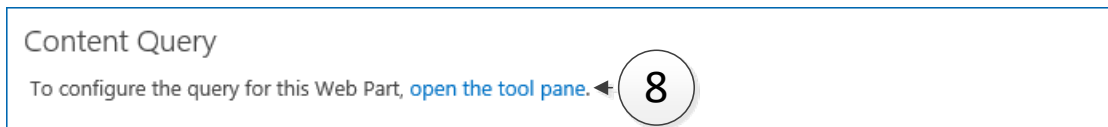
3. Click on a location on the page where you want the web part to appear and then click on the **Insert** tab
4. Then click on **Web Part**



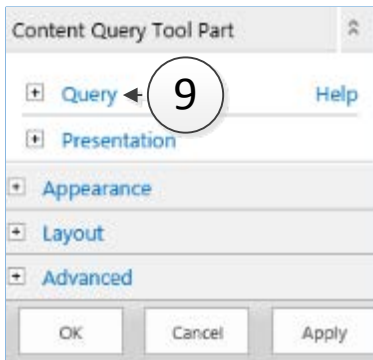
5. Click on the category, **Content Rollup**
6. From the *Parts* selection click on **Content Query**
7. Then click **Add**



- On your page, click on **open tool pane** within the *Content Query* web part



- In the configuration pane on the right of the screen expand the **Query** section



- Under *Source*, click the **radio button** for *Show items from the following list*

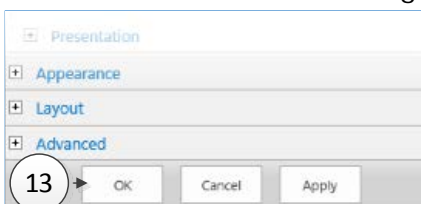
- Click on **Browse** and then select your list or library, alternatively you can type in the URL in a shortened format */sites/news/Promotion Packs*



- Under the *Audience Targeting* heading **tick** *Apply audience targeting* (optionally choose if you wish to include items that are not being targeted).

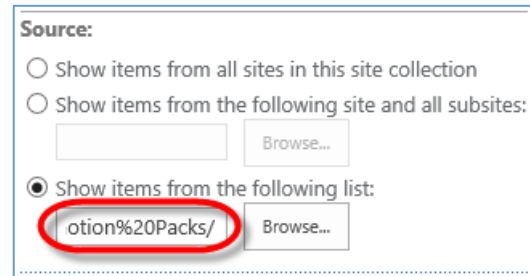


- Optionally you can configure the web part further if you wish but we will click on **OK** at the bottom of the configuration pane



14. Save your changes to the page by clicking on the **Page** tab and then select **Save**

If you get the following error: **Cannot save all of the property settings for this Web Part. The site URL is not valid. The site URL should refer to a site in the current site collection and should be specified as a server relative URL, as in "/sites/news"** please double check the URL that you are using in *Show items from the following list*.



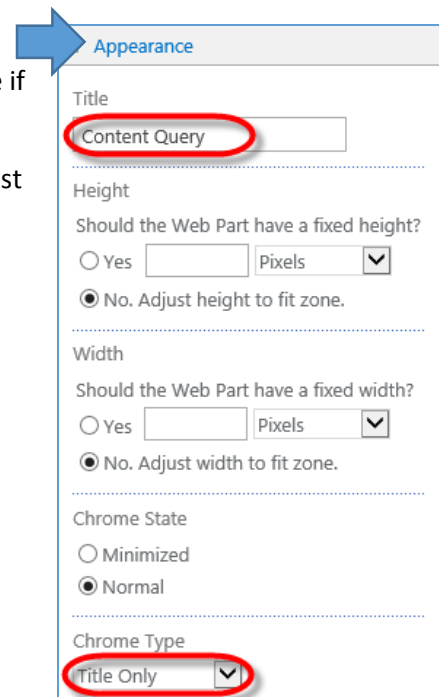
As you can see, the end result is only showing out Scottish stores files that are relevant to them. Another region such as Ireland would see a different collection of files:

- Scottish Stores
Content Query
- Utilities.pdf
 - Toys.pdf
 - Tools.pdf
 - Solar Panels.pdf
 - Plumbing.pdf
 - Lounge Products.pdf
 - Kitchen Wear.pdf

- Irish Stores
Content Query
- Tools.pdf
 - Solar Panels.pdf
 - Plumbing.pdf
 - Lounge Products.pdf

To tidy this up I would recommend changing the web part Title in the Appearance settings. Use the Chrome options to hide the title if you don't wish to display it.

Additionally you can choose to include more metadata from the list or library as well including the document icons. This is achieved in the Presentation settings under Styles. Item style can easily allow you to choose other properties or styles to display.

That covers the two primary ways of applying audience targeting within pages. You can appreciate that these options although time consuming based on the amount of content that you are working with, the solution delivers a lot of value to a business. Rather than maintaining multiple pages, a

single, smarter page is used to address all users. One last area where audience targeting is relevant is navigation.

Navigation

For those of you who are site owners will have the ability to configure the navigation settings for a site. With the publishing infrastructure site collection feature enabled, the navigation menu in Site Settings has additional options. One of which is applying audience targeting to navigational links. This menu is located by clicking on the **Cog** or **Site Actions** in SP2010 > **Site Settings** and selecting **Navigation** under the *Look and Feel* heading.

Structural Navigation: Editing and Sorting

Use this section to reorder and modify the navigation items under this site. You can create, delete and edit navigation links and headings. You can also move navigation items under headings and choose to display or hide pages and subsites.



When adding a link or heading it can be Audience Targeted. This will mean that users added to the *Audience* field will be allowed to see this link.

Audience: 

Security trimming is still in effect. If a user does not have access to a site, they will be unable to see the links to sites. This concludes audience targeting in SharePoint.

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