Workday@OK Learning Campaigns

THIS JOB AID IS FOR: Learning Administrators

This job aid provides step-by-step instructions on how to set-up and run learning campaigns in Workday@OK.

You can create learning campaigns that engage target audiences in learning activities by:

- Promoting content in their **Learning** app. When you create required learning campaigns, Workday@OK displays the content in the **Required for You** area. All other learning campaigns display in the **Announcements** area.
- Sending notifications about the learning content.
- Sending reminders about incomplete items.

Examples of learning campaign content might be:

- Legally required compliance courses, such as workplace violence prevention.
- Courses the agency or a manager wants their department to take, such as how to complete their expense reports.
- New hire training, including courses on policy and procedure, agency culture, notifications set to remind new hires of the benefit enrollment timeline and more.

CREATE AN AUDIENCE

Before a campaign is launched, an audience must be created to identify who will receive the content. Campaign audiences may either be dynamic and change depending on employees' status (e.g., new hire, position, location) then run periodically to accommodate status changes or static with a set of pre-identified employees.

Dynamic Audience

1. Navigate to the **Learning Admin** app, then select **Campaign Dashboard**.
2. Select **Create Audience**, you may also use the **search bar** to navigate to this task.
3. Input a name for the audience, make note of this as you will need the audience name to add it to a campaign.
4. Select the **list icon**, then **Learning Campaign** in the **Available For** field.
5. To assign campaign content as required learning, select the **list icon** in the **Category** field, then **Campaign Category → Required Learning**.

   Note: For the category, the campaign must match the audience (e.g., audience – required must be paired with campaign – required). An audience that is marked for required learning will not be able to be paired with a campaign that is not marked as required learning.

6. You may select the following from the **Type** field:
   a. **Custom Report**
      i. The appropriate reports for this choice are **Learning Audience: New Hires** and **Learning Audience: Slice and Dice**.

        ii.   Select the **arrow** next to **Report Criteria** to set the filtering values for the audience (e.g., Sup Org, Location, Hire Date).

    b. **Organization**

        i.   Select which organization to send the campaign to. For example, select *Company* then *Agency Number* to send a campaign to an entire agency.

    c. **Saved Search**

        i.   Before creating an audience for a campaign, select specific teams using the **Find Workers** report, then select **Save**. Name the search and make note of the name for later use, select **OK**. In the **Create Audience** task, select **Saved Search** in the **Type** field. Input the name of the saved search on the **Selection** field.

    d. **Succession Pool**

        i.   Send a campaign to a selected succession pool.

    e. **Talent Pool**

        i.   Send a campaign to a selected talent pool.

7. Select **OK**.

Static Audience

1. Before creating a static audience for a campaign, select specific individuals using the **Find Workers** report. To include individuals from different sections in the **Find Workers** report, collect the names to include then input them in the following format into the **Report Search Bar**: First Last OR First Last OR First Last OR First Last. This will create a static audience with only these individuals. Then select **Save**.

2. Name the search and make note of the name for later use, select **OK**.

3. Navigate to the **Learning Admin** app, then select **Campaign Dashboard**.

4. Select **Create Audience**, you may also use the **search bar** to navigate to this task.

5. Input a name for the audience, make note of this as you will need the audience name to add it to a campaign

6. Select the **list icon**, then **Learning Campaign** in the **Available For** field.

7. To assign campaign content as required learning, select the **list icon** in the **Category** field, then **Campaign Category → Required Learning**.

    Note: For the category, the campaign must match the audience (e.g., audience – required must be paired with campaign – required). An audience that is marked for required learning will not be able to be paired with a campaign that is not marked as required learning.

8. Select the list icon in the **Type** field and select from the following:

    a. **Custom Report → Learning audience: Slice and Dice**.

        i.   Select the arrow next to **Report Criteria**. In the last column, **List of Emplid's**, input the employee ID numbers for the individuals the campaign is to be sent to.

    b. **Saved Search**

        i.   Search the name of the Saved Search in the **Selection** field.

9. Select **OK**.

CREATE A CAMPAIGN

Once you have an audience created, you will need to create the campaign by selecting the materials to include.

Note: All lessons, courses or programs to be included will need to have already been created. Please refer to the **Learning Content Job Aid** for information on how to create learning content in Workday@OK.

1. Navigate to the **Learning Admin** app and select the **Campaign Dashboard**.
2. In the **Campaigns** section select **Create Campaign**. You may also use the **search bar** to navigate to this task.
3. Input a name for the campaign into the **Title** field. Make note of this name, you will need it later to launch the campaign.
4. In the **Type** field, select **Learning Campaign**.
5. If the content of this campaign is required for the audience, select the **list icon** in the **Category** field. Select **Campaign Category**, then **Required Learning**.

   Note: A campaign that is listed as required learning must be paired with an audience that has been listed as required learning.

6. Select a **Start Date** for the campaign. You will be unable to launch the campaign before this date.
7. Select **OK**.

To Add a Campaign Item

1. To begin adding content to the campaign, select **Add Item**.
2. Input a name for the campaign item in the **Title** field.
3. You may select the following from the **Content Type** field:
   a. **Learning Course.**
   b. **Learning Program.**
   c. **Lesson.**
   d. **Notification.**

   Note: All content must be created prior to being added to a campaign. Content will be selected from the Workday@OK learning resources. There is not an option to create content during the creation of a campaign.

4. In the **Content** field, search for the name of the content to be added, or your agency's number or abbreviation.
5. Select **Next**.
6. In the **Channels** field, select the method(s) notification of the campaign that should be delivered.
7. If you have a previously created template, select it from the **Message** field. If not, skip ahead.
   a. To create a new template, use the **search bar** to navigate to the **Create Message Template** task.
   b. Input a name for the template in the **Name** field.
   c. Select **Learning Campaigns** from the **Notification Type** field, then select **Next**.

  d. For an email notification, you must include both the email **Subject** and the email **Body**.

  e. For a mobile notification, you must include a **Message** to be sent.

  f. Select **Next**.

  g. Review, then select **Save**.

8. Select **Next**.
9. For an email notification, you must include both the email **Subject** and the email **Body**.
10. For a mobile notification, you must include a **Message** to be sent.
11. Select **Next**.
12. Select a date on which to send the campaign item.

  Note: The send date must be within the start and end dates (if applicable) of the campaign.

13. To set a due date for the campaign item, select the box beside **Relative Due Date**. Select the number of days or weeks after the item is sent for it to be due. This will:
  a. Allow you to schedule reminders for items that have not been completed.
  b. Ensure everyone has the same amount of time to complete tasks without you having to keep track and prevent having to edit the due date as new members join the dynamic audience (e.g., new hires, transfers).
14. Review the campaign item, then select **Save**.

To Add a Reminder to a Campaign Item

1. From the campaign item's row on the table, select **Add Reminder** from the last column.
2. Add a name for the reminder in the **Title** field, then select **Next**.
3. In the **Channels** field, select the method(s) of notification from which the campaign should be delivered.
4. If you have a previously created template, select a template from the **Message** field. If not, skip ahead.
  a. To create a new temple, using the **search bar** navigate to the **Create Message Template** task.
  b. Input a name for the template in the **Name** field.
  c. Select **Learning Campaigns** from the **Notification Type** field, then select **Next**.
  d. For an email notification you must include both the email **Subject** and the email **Body**.
  e. For a mobile notification, you must include a **Message** to be sent.
  f. Select **Next**.
  g. Review, then select **Save**.
5. Select **Next**.
6. For an email notification you must include both the email **Subject** and the email **Body**.
7. For a mobile notification, you must include a **Message** to be sent.

  Note: For campaign item reminders, you will have the ability to CC recipients for email notifications.

8. Select **Next**.
9. Select whether to send a reminder if the campaign item has been delivered but not yet completed either on the item's due date, or on a selected number of days or weeks relative to the due date.

10. In the **Time** field, select the time the reminder should be sent out.
11. To create a recurring reminder, select **Set as a Recurring Reminder**. Then select the **Recurring Frequency** and the maximum number of reminders to be sent.
12. Select **Next**.
13. Review the reminder information, then select **Save**.
14. Multiple reminders can be added to a campaign item for varying messages by selecting **Add Reminder** and repeating the process. To edit existing reminders select **Manage Reminders**.

Once all campaign items and reminders have been created, select **Submit** then **Done**.

Note: Sending content via a campaign, assigns said content to learners, however, doing so does not enroll them. When a learner selects the content from the campaign, they will need to then select **Enroll**. Learning Administrators and Agency Learning Administrators may also mass enroll learners to content known to be part of assigned campaigns. For guidance on how to mass enroll, please refer to the **Workday@OK Learning Enrollments and Reports Job Aid**.

LAUNCH A CAMPAIGN

To push out a campaign to learners, it must first be launched.

1. Navigate to the **Learning Admin** app and select the **Campaign Dashboard**.
2. In the **Campaigns** section, select **Launch/Schedule Campaign**. You may also use the **search bar** to navigate to this task.
3. Select the **list icon**, then **Learning Campaign** in the **Campaign** field to browse available campaigns, or search for the name of the campaign.
4. In the **Run Frequency** field, select how frequently the campaign should run. For a dynamic audience, select **Daily Recurrence** or **Weekly Recurrence** to ensure new audience members are included the campaign (e.g., new hires, location/job changes, transfers, FTE changes). For a static audience with pre-determined members, select **Run Now**.

   Note: If an audience member leaves during the completion of a campaign, they will still receive campaign items. For example, if an employee has received Item 1 from a campaign, then transfers agencies, they will still receive the remaining items in the campaign according to the campaign's timeline.

5. Select **OK**, then select **OK** again.

   Note: You will always receive an **Alert** when selecting **OK** to launch a campaign. This is set as a reminder to check the audience information and the number of audience members.

6. Input a name for the campaign launch for documentation purposes in the **Request Name** field.
7. Select the recurrence frequency in the **Recurrence Type** field.
8. In the **Start Time** field, select the time of day the process should be launched.
9. Make sure the **Time Zone** is correct.
10. In the **Catch Up Behavior** field, select whether the campaign should **Run Once** to launch to the audience members immediately, or **None** to have it send to them the next scheduled time for the campaign to run.
11. Select **Done**.