WD Learning: Create, Launch, and Edit Campaign

Learning Admins can create/edit a Learning campaign to assign a course or program, send an initial email, and send up to three reminders to those who have not completed the training.

Important notes:

- Before creating a campaign, complete the steps in the **Create Audience** job aid.
- Always created and test launch in Sandbox (SBX) first. Once tested and refined, the campaign can be replicated in Production.

Overall campaign process:

Create Audience Report → Create Campaign in SBX and Launch → Create Campaign in Production and Launch

Tasks

Create Campaign

1. There are two ways to begin:
   - Go to the **Campaign Dashboard,** and select **Create Campaign.**
   - Type **Create Campaign** in the global search.
2. **Title:** Enter the same title as your Audience. Workday will append the title with “Learning Campaign”.
3. **Type:** Select **Learning Campaign.**
4. **Category:** Select **Campaign Category (Workday Owned)** and then **Required Learning.** This is the same category selected when creating the Audience.
5. **Audience:** Enter your audience title to search.
6. **Exclusion Rule:** This appears only if Custom Report was used. If you want to keep the exact list of learners gathers when you made the customer report, deselect the Enable dynamic removal and resend. If you want Workday to add and remove people from the campaign as they enter or exit the criteria in the report, do not deselect.
7. **Override Default User:** Do no check.
8. **Start Date:** The date the campaign can be launched to learners. Typically the date created.
9. **End Date:** The date the campaign will stop functioning

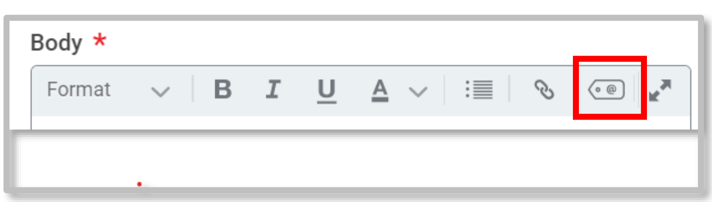
10. Click **OK**

Move directly into the Create Reminder Emails section below to create an initial email to make learners aware of the campaign and reminder emails if the learner has not completed the course(s).

Create Initial Email

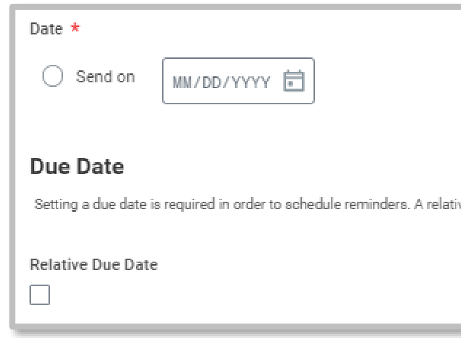
1. Click on **Add Item**.
2. **Item Details:**
   - **Title** – This is a title of your initial email and reminders, seen by you, not the learner. It is given a title so you can make edits to the correct email later.
   - **Content Type** - Select either **Learning Course** or **Learning Program**.
   - **Content** - Enter the course or program title. Do not try to navigate to the title. Only one title can be included in a campaign.
3. Click **Next.**
4. **Setup:**
   - **Channels** –**Email** is the only option.
5. Click **Next.**
6. **Message:**
   - **From Display Name** – The email will come from uva@Workday.com, but you can enter an individual, team, department name, etc., that will see as the email sender.
   - **Reply To –** Enter an email address that will receive emails if the learner clicks reply.
   - **Subject –** Enter the subject of the email, such as: Action Required – Training Assigned to You.
   - **Body –** Enter your message to the learner. This can include a hyperlink to the course, why the training is required, etc.

NOTE: Use the Tag feature personalize the salutation with the learner's name. Click on the tag icon and search **Full Name** or **First Name**. Select between the learner's legal or preferred first name.



7. Click **Next.**

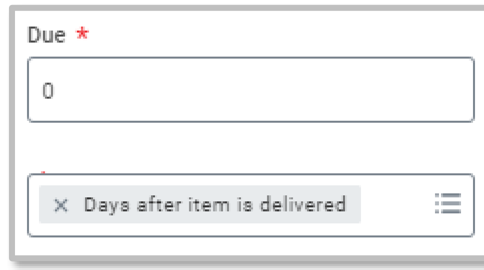
8. **Date:**



   A. **Send On –** A static date the initial email will be sent.

   B. **Relative Due Date –** Email will be sent when the campaign fires to the learner. Select the campaign title in the field.

   C. **Due –** Chose when the email will be sent, relative to the campaign firing. Additional fields will display. Start at the bottom and work your way up.



      - **After Item is –** Choose between when the campaign is Completed by the learner or when the campaign is Delivered to the learner.

      - **Send –** Use both fields to choose between Days and Weeks and then enter a number to define when the email will be sent.

   - **Due Date** – Check the **Relative Due Date** checkbox and additional fields are revealed. Relative due dates are required to schedule reminders. Enter a numerical value in the **Due** field, then select if the value indicates days or weeks before or after being sent.

9. Click **Next.**

10. Review all details entered. If edits are needed, select the corresponding section header on the left. Otherwise, click **Save**. You can now add reminders that will be sent to learners who have not completed the training.

Create Reminder Emails

After completing the initial email, you are brought back to the campaign page and should now see an additional button, Manage Send Dates, and a table that contains your initial email information.

1. Click on the **Add Reminder** button on the right side of the table.

2. **Reminder Details**:

   - **Title** – Title the reminders to differentiate them from the title for the initial email. Consider that you can send up to three reminders, so make each reminder title unique.

3. Click **Next.**

4. **Setup**:

- Channels – Leave the default of Email.

11. Click Next.

12. Message:

- From Display Name – The email will come from uva@Workday.com, but you can enter an individual, team, department name, etc., that the learner will see as the sender.

- Reply To – Enter an email address that will receive emails if the learner clicks Reply.

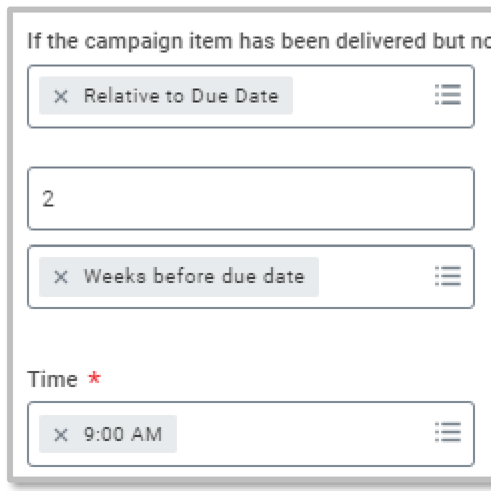
- Subject – Differentiate this from the initial email (Reminder – Complete Required Course).

- Body – Enter your message to the learner. This can include a direct link to the course, a reminder of the due date, or why the training is required. See the initial email instructions to personalize the email with the learner's name in the salutation.

5. Click Next.

6. Send Date: The initial email information will be present and un-editable. Use this to inform the timing of your reminders.

- If the campaign item has been delivered but not yet completed:
  - If On Due Date is selected, all remaining reminders will have to be sent after the due date.
  - If Relative to Due Date is selected, you will need to count the days backwards from the due date to select the reminder launch date. Additional fields will activate.
    - Select between weeks before/after or days before/after due date.



- Time. Consider the day of the week the email will be sent if this is relative to the due day. If the day will be a Friday, you do not want to send the email at 4:00 PM.

- Set a Recurring Reminder: Use this with caution. Consider creating the two remaining custom reminders vs. repeats of the same message.

7. Click Next, review the details and click Save.

8. Create up to two additional custom reminders with different messages of urgency as the due date approaches or goes by.

11. **Important:** Once you have completed the reminders, you must still click Submit to save the campaign and notification information.

Launch Campaign

When the time is appropriate, you will launch your campaign. This should always be done in Sandbox first and then run the Learning Campaign Audience report to ensure the correct people receive the campaign.

1. Enter **Launch / Schedule Campaign** in the global search.
2. **Campaign:** Enter your campaign title.
3. **Run Frequency**: Select **Run Now, Daily Recurrence**, or **Weekly Recurrence**
4. **Request Name:** Enter your name.
5. **Priority** - **Normal** is the default. Do not change unless there are extenuating circumstances.
12. On next page, you campaign is launching. Click the **Refresh** button to see the progress of the launch. The larger the audience, the longer the run time. If Workday is processing other large items simultaneously, such as payroll, this will take longer.
13. Once completed, run the Learning Campaign Audience report. If everything is correct, repeat all steps in Production Workday.

Edit Campaign

1. From the **Campaigns** app under **Create and Manage**, click on **Edit Campaign.**
2. **Title** – Enter the campaign title.
3. Review all information to ensure accuracy.
4. Click **OK**.
5. To add a reminder, click the Add Item button above the table. To add a reminder to the current items, click Add Reminder in the table. Note there is an Edit button for the initial reminder and a Edit Reminder button for the reminders.
6. When finished, click **Submit**.