WD Learning: Create, Launch, and Edit Campaign

Role Matrix • Workday LMS Terminology

Learning Admins can create/edit a Learning Campaign to assign a course(s) or Learning Program to a group of workers, and simultaneously send communication about the assignment.

Important notes:

- Before creating a campaign, complete the steps in the Create Audience job aid.
- All campaigns are to be created first in Sandbox. Once tested, refined, and approved, then create the campaign in Production.

An outline of the overall campaign process:

Create Audience / Report ——> Create Campaign ——> Launch Campaign

Tasks

- Create Campaign
- Launch Campaign
- Edit Campaign

Create Campaign

1. In the Sandbox tenant, select the Campaigns app on the Workday Home page.

2. Select Create Campaign.

3. Enter a Title. Suggestion: Use the same title as your Audience. Workday will append the title with “Learning Campaign”.

4. In the Type field, select Learning Campaign.

5. Category must align with Campaign Audience. If this is required for the Campaign Audience, select the category of Campaign Category (Workday Owned) and then Required Learning.

6. Audience / Audience Type - Navigate to either the Saved Search or Custom Report.

7. Exclusion Rule – Enable dynamic removal and resend is automatically checked.

8. Calculated as User – is defaulted. If it should be changed, select Override Default User and enter the name.

9. Start Date / End Date - Enter the date the campaign will be available and the date the campaign will end (this is not the due date but rather the last day of the campaign itself). If this is required learning, the content will remain on the Required For You slider until it is completed by the learner or the campaign ends.

10. Click OK
11. On the next screen select the Add Item button.

12. Enter the title of the class/content or Learning Program. Use the title of the content being assigned.

13. **Content Type** - Select Learning Course or Learning Program.

14. **Content** - Search and select the content title.

15. Click Next or Setup in the left menu.

16. Leave the default of *Email* for Channels.

17. Click Next or Message.

18. Enter details for the message to send to learners. **Subject** and **Body** are required. If using **Reply To**, enter an email address. Click Next.

19. Enter a **Send Date** (required).

20. Check the box to enter a **Relative Due Date**. 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. Click Next.

21. Review all details entered. If edits are needed, select the corresponding section header on the left. Otherwise, click Save.

22. If needed, continue to Add Items

23. **Manage Send Dates** – use if multiple items added with differing send dates.

24. Once satisfied, click Submit and Done.

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**Launch Campaign**

1. Select the **Campaigns** app on the Workday Home page.

Under **Create and Manage**, click on **More**, then **Launch / Schedule Campaign**.

2. In the **Campaign** field, select **Learning Campaign** and search for your campaign title.

**Run Frequency** - select **Run Now, Daily Recurrence**, or **Weekly Recurrence**

3. Click **OK**.

Enter a **Request Name** (Your Name).

**Priority** - select **Normal** unless there are extenuating circumstances.
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4. **Run Frequency** – verify choice. If you selected a daily or weekly recurrence, enter the **Start Time**, **Start Date**, and **End Date**. Click **OK**.

5. On the **View Background Process** page, click the **Refresh** button. Continue to click till the status is completed.

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## Edit Campaign

1. Select the **Campaigns** app on the Workday Home page.

2. Under **Create and Manage**, click on **Edit Campaign**.

3. **Title** – type or select the appropriate campaign name.

4. Review all information to ensure accuracy.

5. Edit the field(s) needing revision. Click **OK**.

6. Click **Add Item** if you would like to add Lessons, Courses and a **Message**. Follow steps 11-24 in **Create Campaign** above to add Item(s).

7. When finished adding/editing/deleting and have returned to the Campaign, click **Submit**.