WD Learning: Enroll Learner in Course

Role Matrix • Workday LMS Terminology

Currently, only campaigned learning assignments have a due date. Enroll learners in courses only when there is no regulatory due date or due dates can be managed external to Workday. If the completion of a courses will be audited by external agencies, contact AskHR@virginia.edu for assistance in creating/assigning a campaign.

Tasks

- Enroll Others in Learning (Mass Enroll)
- Enroll Learners in a Program
- Save and Access a ‘Find Workers’ Saved Search
- Faceted Filters Defined

Enroll Others in Learning (Mass Enroll)

Learning Local Admins and Learning Admins:

1. Go to the Learning Admin app.

2. In the Manage Learning menu, select Find Workers – Enroll Others in Learning (Mass Enroll)

Learning Enrollment Admins

In the Workday global search, enter Find Workers – Enroll Others in Learning (Mass Enroll).

DECISION: Select the type of assignment.

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Go to Step</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual</td>
<td>Single learner being assigned.</td>
<td>1</td>
</tr>
<tr>
<td>Small Group</td>
<td>A small number of random learners with nothing in common. Different job titles, managers, hire dates, etc.</td>
<td>2</td>
</tr>
<tr>
<td>Related Group</td>
<td>Grouping, such as Job Profile (title), hire date period, physical location, etc.</td>
<td>3</td>
</tr>
</tbody>
</table>
WD Learning: Enroll Learner in Course

1. Assign to Individual:
   A. Type the learner’s name in the Find Worker search (below the blue banner and above the list of learners).
   B. Go to Step 5.
2. Assign to a Small Group:
   A. Scroll down a little until you see the Worker faceted filter on the left side.
   B. Enter and select the name of the worker in the field below the short list of names.
   C. Repeat this to build a list of worker names on the page.
   D. Go to Step 5.
3. Assign to Related Group:
   A. Scroll through the facets in the left menu. Some of the commonly used facets are Supervisory Organization, Location, Management Level, Job Family Group or Job Family. See facet descriptions.
   B. Apply as many filters as needed to remove worker and filter to the needed learners.
      a. Go to Step 5.
4. Assign to Random Group:
   A. In some instances, the group is large and difficult to compile with using filters. It may help to gather as many possible, assign the training, and then compile a second group of workers.
5. Check the Results box above the list of learners.
6. Click the Learning Mass Enroll button
7. Type all or part of the course or program title in the Course field and select the title.
8. Click OK.

DECISION: Is the enrollment in an offering or digital course?

<table>
<thead>
<tr>
<th>If Offering</th>
<th>Go to Step 9.</th>
</tr>
</thead>
<tbody>
<tr>
<td>If Digital</td>
<td>Go to Step 10.</td>
</tr>
</tbody>
</table>
WD Learning: Enroll Learner in Course

Role Matrix • Workday LMS Terminology

9. If multiple offerings are available, check the box corresponding to the date needed.

Note: The system will **not** block admins from enrolling beyond the offering/room capacity. Review the ‘Waitlist Available’ and ‘Unlimited Capacity’ columns to confirm seat availability.

10. Click **OK**.

11. **Assign as Required Learning:** Select **Yes** or **No**.

   A. Yes – allows for a due date and places the course on the learner’s **Your Assigned Training** slider.

      i. Click in the **Due Date Type**. Select either static **Date** or **Duration**.

   B. No – does not provide a due date. Learner can access course from the Not Started menu item on the Learning dashboard. Course is not visible on any sliders.

12. The list of learners is displayed again. Check the box in the header row to select all learners. Check the box next to a learner to deselect the learner if they should not receive the training.

   **Troubleshooting Note:** If some learners are missing from the list, look directly above the names to see tabs for **Eligible** or **Ineligible**. Select the **Ineligible** tab to locate missing learners. If there, it will include an explanation, such as the learner is already enrolled or has completed the course.

13. Select **OK**.

14. Click **OK** and then **Done**.

---

**Enroll Learners in a Program**

The steps to enroll learners in a program are the same as above with the exception of when you get to the Learning Content field after selecting your learners (see step 7). At step 7, type the title of the program directly in the search. Do not click on Digital Courses or Blended Courses and then enter your search.

---

**Save a ‘Find Workers’ Search**

If several facted filters are used to compile the list of learners and that list will be re-used to assign other training later, it is possible to save the configuration of the filters for use again. **Note:** Saved searches cannot be shared with other Learning admins.

1. Perform the steps in **Enroll Others in Learning (Mass Enroll)** above, but stop before you click the **Learning Mass Enroll** button.
WD Learning: Enroll Learner in Course

Role Matrix • Workday LMS Terminology

2. Scroll to the top of the page and select the Save button above the facets. **Note:** At least one facet must be used to activate the Save button.

3. Create a Name for the saved search that clearly describes the list of learners.

4. Click OK.

5. There is now a number after the header Saved Searches, highlighting the number created. Click the blue chevron to the left of Saved Searches to reveal the list.

6. To use the search, go to the top of the page and select Saved Searches to access the list, then select the title needed to display the learners

7. Click on the Manage My Saved Searches to edit or delete a saved search.

**Troubleshooting Notes: Course Over Enrollment OR Unknown Attendee.** Use this process for over-enrollments or when an unanticipated participant attends the offering.

Only learners can add themselves to a waitlist; Learning admins cannot add a learner to a waitlist. However, they can override the offering limits by enrolling learners in a full offering. If this happens, run a report and learn who over-enrolled learners.

1. Click on Learning Admin app on the home page.

2. In the search bar, type Learning Enrollment and Completion Report All – Faceted.

3. Use the prompts to narrow the list that will appear. Click OK.

4. Once the report appears, scroll right to the column(s) Enrolled By or Learning Assigned By to view the name.

**Facets Defined**

The facets on the Mass Enroll page allow filtering to specific groups of people. Below are each facet and their description. Once you filter to the correct group, consider saving the filter settings so the set up does not need to be repeated. Saved searches cannot be shared with others who enroll learners.

- **Worker** – Allows admin to create a list of unassociated learners and enroll all simultaneously.
- **Most Recent Hire Date** – Groups learners by hire date ranges. Multiple date ranges can be used simultaneously.
WD Learning: Enroll Learner in Course

Role Matrix • Workday LMS Terminology

- Location – Groups by the learner’s building workplace as identified by UVA Facilities Management. Multiple buildings can be selected.

- Job Profile – Groups by the HR job title. Multiple titles can be selected.

- Management Chain – Includes all supervisory organizations reporting to the manager selected. Does not go to organizations above the manager selected. Multiple managers can be included.

- Job Family – A grouping of related job profiles. If chosen, all learners in the selected job family will appear.

- Job Family Group – A grouping of related Job Families.

- Worker Type – Differentiates UVA employees from “non-UVA” categorized employees.

- Management Level – Groups by hierarchical level.

- Schools – Groups by the schools listed on job applications for current employees. This is not a list of various UVA schools.

- Professional Affiliations – Groups by affiliations that are self-reported by the employee, either in the application or in the Worker Profile/Career tab.

- Fields of Study – Self-explanatory

- Competency – Groups employees who added a specific competency to the Worker Profile/Career/Competency list.

- Certifications – Groups by certifications listed in either the application or added to the Worker Profile/Career area.

- Supervisory Organization – Groups by Sup Org/Manager title.

- Employee Type – Differentiates UVA workers into official HR categories of Regular, Student worker, Wage or Temp. Does not include contingent workers.

- Job Classification – Groups by worker employment classification (non-designated, designated, wage type, etc.)

- Job Interest – Groups by learners self-identified interests in other UVA roles. Found in the Worker Profile/Career/Job Interest tab

- Supervisory Org Primary Position – Captures employees in their primary position Sup Org at UVA. Useful when dealing with dual employees.

- Any Current Academic Appointment on Academic Tenure Track – Is a True/False option.

- Academic Appointment Tenured - Is a True/False option.
WD Learning: Enroll Learner in Course

Role Matrix • Workday LMS Terminology

• Academic Ranks – Groups by the Faculty ranking.
• Has Emeritus - Is a True/False option.
• Academic Track Types – Lists all Faculty tracks.
• Academic Appointment Identifiers – Groups by types of Faculty appointments.
• Academic Tenure Statuses – Tenured, Tenure Eligible, and Tenured Pending Review
• Specialty – Includes hires with an agreement to complete a certification or licensure at an agreed-upon date post-hire.