

Human Resource Management System

Workday Job Aid Using Learning



This Job Aid describes tasks that are centered around the major components of the Workday Learning module.

- Employees
- People Managers
- Human Resources

Contents:

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1. View Courses

Workday Learning makes it easy to find training material. There are several ways in which to view the courses that are available to you in Workday Learning.

Here are the steps to accomplish this task:

- Click on the View All Apps link on the Homepage. Once the list of available applications displays, click on the **Learning Application**.
- Make sure that the Discover page is displayed. If it is not, click on the **Discover** icon on the left side menu.
- To find the course(s) you are interested in use any of the following methods:
 - a. Use the **Browse Learning** feature under the **Explore the Learning Catalog** section of the page.
 - b. Use the **Browse Topics** feature under the **Browse Learning Topics** section of the page.
 - c. Browse through the courses listed in the **Most Popular** section.
 - d. Browse through the courses listed in the **Recommended for You** section.
 - e. Browse through the courses listed in the **Based on Your Interests** section.
 - f. Browse through the courses listed in the **Recently Added** section.



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2. Enroll in Course

With a few clicks, you can be enrolled in any course found in Workday Learning.

Here are the steps to accomplish this task:

- Click on the **Learning Application** on the Home Page.
- Find the course you would like to enroll in using any of the methods referenced in the [View Courses](#) section.
- Once you have identified the course you would like to enroll in, follow these steps to complete the enrollment process:
 - a. Click on the image of the course you wish to enroll.
 - b. On the course page, click **Enroll**.
 - c. Once you have reviewed the details of the course and confirmed your interest in taking this course, click the **Submit** button.
 - i. **NOTE:** Your enrollment request will typically be sent to the Workday Learning Administrator for approval. In those instances when the course is considered an “on the job training” course, the Assessor (if assigned) will approve the request.
 - ii. **NOTE:** The **Enroll** button will change to **Pending Approval** once the request is submitted. Once the request is processed, the employee will receive a notification detailing the outcome of the decision.
 - d. Click **Done**.



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3. Approve Enrollment

When an employee registers to take a training class, the Learning Admin or Learning Assessor may be needed to complete the enrollment process.

Here are the steps the Learning Admin/Learning Assessor need to follow to accomplish this task:

- Access your Inbox in Workday.
- Click on the **Enroll in Course** action in your Workday inbox.
- Review the request.
- Click the **Approve** or **Deny** button based on your decision.
 - a. **NOTE:** A notification will be sent to the employee who made the enrollment request informing them of your decision.



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4. Drop Course

There are times when you may need to unenroll from a course that you previously enrolled in. This is referred to as **Drop a Course**.

Note: Some courses may need administrator approval to be dropped.

Here are the steps to accomplish this task:

- Click on the Learning Application after clicking on the **View All Apps** link on the Home Page.
- Click on the **My Learning** item on the menu displayed on the left side of the page.
- Click on the **Drop Enrollment** feature under the **Need to Drop an Enrollment** section of the page.
- Select the course from the list provided on this page.
- Click the **OK** button.
- Select the **Drop Reason** from the list provided.
- Click the **OK** button.
- Enter a comment if so desired.
- Click **Submit**.
- Click **Done**.

Note: This may send your request to your manager for approval. Once your manager processes your request you will receive a notification.

Note: You cannot drop a course less than 48 hours before the start of the course. Please contact the Workday Learning Administrator if you wish to drop a course that begins in less than 48 hours.



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5. Manage Course

Within Workday, the Learning Administrator can create a new course as well as update an existing course. These functions are accessed from the **Learning Admin** Application.

NOTE: To accomplish this task, one needs to be assigned the **Learning Administrator** security role.

Here are the steps to accomplish the **Create Course** task:

- Click on the **Learning Admin** Application from the Home Page.
- Click on the **Course** link under the Create tab.
- Select the **Course Type** (Blended or Digital).
- Click **OK**.
- Fill in all appropriate information (* signifies a required field) in the **Course Details** section.
- Scroll to the bottom of the page and click on **Add Lesson** to add the course content.

Note: Add additional lessons by clicking **Add Lesson**.

- Click **Submit**.
- Click **Done**.



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Here are the steps to accomplish the **Updating of Existing Courses** task:

- Click on the **Learning Admin** Application from the Home Page.
- Click on the **Manage Learning Content** link under the Management tab.
- Use one of the search options to find the course in question.
- Once found, click on the course listed in the search results.
- Click on **View as Admin** button at the bottom of the page.

Note: If you have already clicked on the **View as Admin** button and have not logged out, you will start in **View as Admin** mode and will instead see the **View as Learner** button.

- Click the **Edit** button at the bottom of the page.
- At this point, you will be presented with two options: **Update Version** or **Add New Version Effective**. If the current version of the course does not have an **Expiry Date** (Expiration Date) associated with it the Update Version option will be selected with no ability to select the other option. If an Expiry Date does exist, then you will be able to create a new version of the course with an effective date set to the Expiry Date.
- Click the **OK** button to proceed.
- Update all appropriate information (* signifies a required field) in the **Course Details** section.
- Scroll to the **Lesson Details** section at the bottom of the page and fill in all appropriate information (* signifies a required field).

Note: Add additional lessons by clicking **Add Lesson**. Remove existing lessons by clicking on the Trash can () icon next to the lesson.

- Click **Submit**.
- Click **Done**.



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6. Manage Course Offering

For the courses in Workday that are considered Blended, a Course Offering must be defined so that users can enroll in it. A course offering is a specific instance of a course. It specifies a time and a location. It may also list the instructor if one has been assigned to the course.

NOTE: To accomplish this task one needs to be assigned the **Learning Administrator** security role.

Here are the steps to accomplish the **Updating of an Existing Course Offering** task:

- Click on the **Learning Admin** Application from the Home Page.
- Click on the **Schedule Offering** link under the Management tab.
- Use one of the search options to find the course in question.
- Once found, click on the course listed in the search results.
- Click on **View as Admin** button at the bottom of the page.

Note: If you have already clicked on the **View as Admin** button and have not logged out, you will start in **View as Admin** mode and will instead see the **View as Learner** button.

- Scroll toward the bottom of the page and click on the **Scheduling** tab. Here you will find the Course Offerings.
- Find the Course Offering you wish to update and click on its name.
- At the top of the page click on the **Actions** button and then hover over the **Course** menu item and then click on the **Edit** option.
- Make the necessary modifications (* signifies a required field).
- Click the **Submit** button.

Note: This update will require approval from the HR Executive role.

- Click **Done**.



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Here are the steps to accomplish the **Create a Course Offering** task:

- Click on the **Learning Admin** Application from the Home Page.
- Click on the **Schedule Offering** link under the Management tab.
- Use one of the search options to find the course in question.
- Once found, click on the course listed in the search results.
- Click on **View as Admin** button at the bottom of the page.

Note: If you have already clicked on the **View as Admin** button and have not logged out, you will start in **View as Admin** mode and will instead see the **View as Learner** button.

- At the top of the page, click on the **Actions** button and then hover over the **Learning Course** menu item and click on the **Schedule Course Offering** option.
- Fill in the necessary information (* signifies a required field).
- Click the **Submit** button.

Note: This update will require approval from the HR Executive role.

- Click **Done**.



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7. Manage Learning Instructor

There are two types of Instructors found in Workday Learning; Internal and External. Internal instructors are employees of the County. External instructors are associated with outside vendors that the County hires to administer training on a specific topic. Each is managed differently and the information collected is also different. In this section, we will review how to create and update these two types of instructors.

NOTE: To accomplish this task, one needs to be assigned the **Learning Administrator** security role.

Here are the steps to accomplish the Create Learning Instructor task: (* indicates the field is required)

- In the Workday Search bar enter "Cre Lea Ins".
- Click on the task **Create Learning Instructor**.
- Select the instructor type (Internal, External)
- Click **OK**

Internal

- Select the County **Worker** that you want to designate as an instructor.
- Click **Submit**.

Note: This update will require approval from the HR Executive role.

- Click **Done**.

External

- Fill in all appropriate information (* signifies a required field).
- Click **Submit**.



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Here are the steps to accomplish the Edit Learning Instructor task: (* indicates the field is required).

- In the Workday Search bar enter **Edi Lea Ins.**
- Click on the task **Edit Learning Instructor.**
- Select the learning instructor you wish to update after identifying them as either an internal or external instructor.
- Click **OK**
- Update fields as needed (* signifies a required field).
- Click **Submit.**
- Click **Done.**



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8. Manage Program

A program in Workday Learning allows the **Learning Administrator** to group existing content (Blended Course(s), Digital Course(s), or Individual Lesson) to form a structured curriculum with rules that control what the individual can access, in what order they must complete them, and if advancement in the program is based on successful completion of the previous steps.

Note: To send out course material via a Learning Campaign, it must be housed within a program.

The management of a program consists of both creating and editing programs. In this section, we will review both tasks.

Here are the steps to accomplish the Create Program task: (* indicates the field is required)

- Click on the **Learning Admin** Application from the Home Page.
- Click on the **Program** link under the Create tab.
- Fill in all appropriate information (* signifies a required field) in the **Program Details** section.
- Scroll to the bottom of the page and click on **Add Content** to add the program content.

Note: Add additional content by clicking **Add Content**.

- Click the Save button to save all of your changes. When you have finished making all of your updates click **Submit**.

Note: The clicking of the **Submit** button will trigger an approval request to be sent to the HR Executive role.

- Click **Done**.



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Here are the steps to accomplish the Edit Program task: (* indicates the field is required)

- Click on the **Learning Application** on the Home Page.
- Click on the **Browse Learning** feature under the Learn section. *You may need to click **More** to show additional options
- Use the **Type** filter on the left side of the page and click **Program**.
- Click on the program you would like to update the list of programs displayed.
- Click on **View as Admin** button at the bottom of the page.

Note: If you have already clicked on the **View as Admin** button and have not logged out, you will start in **View as Admin** mode and will instead see the **View as Learner** button.

- Click the **Edit Program** button at the bottom of the page.
- At this point, you will be presented with two options: **Select Version** or **Add New Version Effective**. Make the appropriate selection based on need.
- Click the **OK** button to proceed.
- Update all appropriate information (* signifies a required field) in the **Program Details** section.
- Scroll to the **Add Content** section at the bottom of the page and fill in all appropriate information (* signifies a required field).

Note: Add additional content by clicking **Add Content**. Remove existing content by clicking on the Trash can () icon next to the lesson.

- Click the Save button to save all of your changes. When you have finished making all of your updates click **Submit**.

Note: The clicking of the **Submit** button will trigger an approval request to be sent to the HR Executive role.

- Click **Done**.



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9. Personalizing Learnings

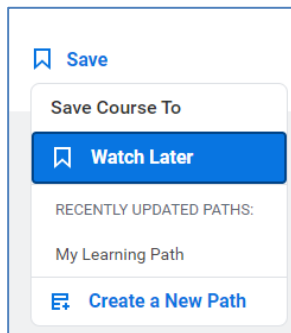
The flexibility built into Workday Learning enables an employee to tailor their experience within the Learning application so that it best fits their needs. From selecting which sections to display on the **Learning Dashboard** to the setting of preferences that trigger which content to serve up; Workday empowers its users to get the most out of the learning materials available.

The **Recommended for You** portlet uses Artificial Intelligence (AI) to determine which courses to serve up to an employee.

The **Based on your Interests** portlet provides content based on the preferences the employee defines as their primary interests.

In Workday Learning there is also a feature labeled **Learning Path**. This tool enables employees to group content they are interested in to form a personalized curriculum for them to follow. This provides ease of access to those courses while also tracking progress. Multiple Learning Paths can be created by an employee.

When an employee finds content they are interested in they can click on the Save button to add it to an existing Learning Path or create a new Learning Path.



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10. Create Learning Campaigns

Workday's campaign management tool leverages system data to push required and relevant content to targeted employee groups known as **Audiences**. This capability automates this disbursement task and provides completion tracking of pushed-out content.

NOTE: To accomplish this task one needs to be assigned the **Learning Administrator** security role.

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There are four main steps in leveraging this Campaign functionality.



The first step in the process is to identify the target audience for the campaign. These will be the people that are to be assigned this campaign. The audience can be defined using several different methods with the most common being a **Custom Report** or a **Saved Search**. Once the Audience has been identified a **Campaign Audience** needs to be built so that it can be assigned to the Campaign.



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Here are the steps to create a **Campaign Audience**:

- In the Workday Search bar enter **cre aud**.
- Click on the task **Create Audience**.
- Enter a name for the Audience you are creating.
- Select **Learning Campaign** for the Available for field.
- Under the **Details** section select the method used to define the audience grouping using the **Type** field.

Note: The options to pick from are: Custom Report, Organization, Saved Search, Succession Pool, and Talent Pool.

- Based on the **Type** selected a corresponding list will be displayed to select the specific item. Review the list and make the appropriate selection.
- Click **OK**.
- Click **Done**.

Once the Campaign Audience is created it is time to create the Campaign itself.

Here are the steps to create a **Campaign**:

- Click on the **Learning Admin** Application on the Home Page.
- Click on the **Campaign** feature under the **Campaigns** section of the page
- Fill in all appropriate information (* signifies a required field)

Note: Select **Learning Campaign** as the **Type**.

- Select the Audience created from the **Audience** search option.
- Enter the Start Date of the Campaign.
- Click **OK**.
- On the Campaign Details page, you are to define the learning content for the Campaign.
- Click the **Add Item** button to assign material (e.g. Program, Course, Lesson) to the campaign.

Note: Continue to click on the **Add Item** button to assign material to the campaign.

- Click **Submit**.
- Click **Done**.



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With the Campaign created with its audience and content defined, it is now time to schedule the delivery of the Campaign. This is referred to as **Launching or Scheduling a Campaign**.

Here are the steps to launch a **Campaign**:

- In the Workday Search bar enter **lau cam**.
- Click on the task **Launch / Schedule Campaign**.
- Select the learning **Campaign** from the list provided.
- Set the **Run Frequency**.
- Click **OK**.
- Enter all appropriate scheduling information (* signifies a required field).
- Click **OK**.
- Click **Done**.

At this point, your Campaign is all set and will be distributed to the target audience on the schedule defined for it. For any changes that need to be made to the Campaign, the Learning Administrator would select the **Campaigns** option from the Campaign section of the Learning Admin application. This will provide them with access to any existing Campaigns so that they may be viewed/edited as needed.



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Change Log				
Revision Number	Date of Change	Affected Lesson	Action	Initials
1.1.1.1	09/15/2021		Log Created	RK