



Build an Engagement In Workday Learning



This Building an Engagement in Workday Learning Tip Sheet is for Workday Learning Admins.

Before Building an Engagement

Before creating an engagement, confirm that all required components (outlined below) have been completed. Use the links below to view tip sheets with detailed instructions for each process.

- [Upload learning content into Workday Learning \(i.e. course, program, lesson, etc.\)](#)
- [Create an Engagement audience.](#)
- [Use Message Builder to design the structure of your templates.](#)
- [Build and configure notification templates.](#)

Creating an Engagement

Engagement Dashboard

More Actions, create new, search or edit engagements

Creating a New Engagement

1. Type **Engagement Builder** into the search bar > Select the **report**.
2. Select **Create Engagement**.
3. From the Engagement Details window, include the following:
 - **Engagement Title:** The title you want for the engagement.
 - **Engagement Type:** Select **Learning Campaign**.
 - **Exclusion Rule:** If left checked, the engagement will continuously be updated every 6 hours for the entirety of its life.
 - **Integration System User:** Type **ISU_Engagement_Builder**.
 - **Start Date:** The first day of the engagement
 - **End Date:** The last day of the engagement.
4. Select **Done** to begin customizing the Engagement.

Engagement Details

The **Engagement Details** menu allows you to build and finalize the Engagement. From this menu, you will add the Audience, Default Message, and Reminders.

1. Select **Add Audience**.
 - From the Audience Source, choose the appropriate audience for the Engagement.
2. Select **Done** to attach the audience to the Engagement.

Note: After adding the audience, use **More Actions > View Audience/Edit Audience** to change or preview the audience.

3. Select **Add Default Message** in the Message field to apply the same message to the whole Engagement.
4. From the **Message** Template field, select the message (that was created in message builder) for the engagement. This message should be an overview of what the engagement content is about and what learners can expect. This is NOT for reminders

Note: Leave the Default Message blank to create customized message templates within each engagement item as needed.

5. From **Add an item to build your engagement**, select **Add Item > Learning**. The **Learning Details** window opens.
 - **Send Condition:** The date that the content will be sent to the learners of the engagement. (i.e. the same start date as the engagement start).
 - **Content Type:** Learning Course, Program or Lesson (this must already be created and live in Workday Learning.)
 - **Content:** The specific content in Workday Learning from the “Content Type” group chosen above.
 - **(Optional)** Check this box to require content and display in learning sliders.
 - **(Optional)** Check this box to add a due date for the content.
 - Select **Done**.

Note: The option for reminder notifications will only appear if a due date was established for the engagement content.

6. **(Optional):** Select **+ Reminder** to add reminder notifications.
 - Condition: Choose from On due date, Before due date, or After due date.

- If choosing before or after due date, specify the number of days or weeks for sending.

Note: When calculating # of days for reminders, Workday does take the weekend into consideration.

7. Select **Next**.
8. From the Message Template menu, select the template you want to use for this notification.
9. Customize the Reply To, CC Recipients and Subject areas of the notification as needed.
10. Edit the body of text to fit the notification.
11. Select **Done** to finalize.
12. Repeat steps 6-11 as needed to add additional reminders.
13. Once you are ready to finalize the engagement, select **Submit**.

Note: You may also choose **Save for Later**. However, only the individual who saved the engagement will be able to edit it, as it will appear in that person's Workday inbox (My Tasks).

Modifying an Engagement

If modifications are needed to the Engagement after submission, return to the Engagement Builder report.

Engagement Audience

From Engagement Builder, select the blue-linked **audience** in the engagement to access and modify the audience.

More Actions

From the **More Actions** menu, you can also:

- **Edit** – Opens the Engagement Details menu, allowing you to manage all aspects of the engagement.
- **Duplicate** – Creates a copy of the engagement along with all associated details.
- **Run Now** – Overrides the scheduled run date and executes the engagement immediately.
- **Suspend** – Temporarily pauses the engagement and prevents any associated actions from running.

- **View Run Logs** – Displays the history of engagement runs, including any errors or warnings encountered.
- **View Only** – Provides read-only access to the engagement and its details without permitting changes.

Managing an Engagement

Engagement Builder enables you to view, modify, and track engagements. It displays important information including the start date, audience, and tools to suspend or update your engagement as needed.

1. From the Workday search bar, type **Engagement Builder** > Select the **report**.
2. All Engagements display. Select More Actions to edit, duplicate, run, suspend, view run logs or view only.

Note: Learning administrators can view all engagements listed in Engagement Builder. Please limit your access to engagements relevant to your role and be courteous to others.