Send Ad Hoc Engagement

STAFF

Workday Student

This tip sheet is intended for anyone interested in learning more about identifying a specific student or group, initiating the Ad Hoc Engagement tool, and either selecting a template or composing a new message with a subject, body, and optional attachments.

Send an Ad Hoc Message

Ad hoc engagement refers to the process of sending targeted communications to students or prospective students on an as-needed basis. These communications may include emails, push notifications, and other message types. All Ad hoc engagements permit outreach to be tracked in the student's Workday activity.

To send an Ad Hoc Message, follow these steps:

1. **Locate the Student**
   - Search for the matriculated student or student applicant in Workday using their name or ID.
2. **Access Actions**
   - On the student's profile, click the Actions button (located beneath the student's photo in the navigation ribbon on the left).
3. **Select Engagement**
   - From the **Actions** button menu,
     - Expand **Engagements**
     - Select **Send Ad Hoc Engagement**
4. **Configure Message**
   - **Existing Engagement Item**

Use this option to send a previously created engagement item.

- **Category**: Select the Engagement Category for the previously created item.
- **Engagement Item**: Select the desired Engagement.

- **Compose Email**

Select this option to create a new email for one-time use.

- **Category:** Select Engagement Category that is most closely associated with the message.

- **Notification Template (optional)**: Select or create an Email or Notification Template.
- **From Display Name (optional)**: Enter the Display name for the From Email Address.
- **Reply to Email Address (optional)**: Enter an alternate reply email, if different from the From Email Address.
- **Subject:** Enter the email subject in accordance with departmental requirements.
- **Body:** Enter and format the email body.

5. **Review and Send**
   - Confirm all details, then send the message.

Workday sends the email immediately, and it will appear in the Student History tab on a student's profile.

Send Message to Enrolled Students

To send messages to students enrolled or waitlisted in a course section, follow these steps:

1. **Access the Course Section Roster**
   - Ensure you have the required security access to view the course section and the **Manage: Group Ad Hoc Communications - Course Roster** domain.
2. **Select the Course Section**
   - Use the View Course Section Roster report and select the appropriate course section.
3. **Click Send Message**
   - After selecting the course section, click Send Message.
4. **Compose Your Message**
   - **Contact Method**: Currently, only **Email** is supported for sending messages.
   - **From Display Name**: Enter a display name that may differ from the actual sender.
   - **Reply To**: Enter the email address where replies should be directed.
5. **Send the Message**

Once the message is composed, send it to all selected students. Workday sends the email immediately, and it is recorded in the **Student History** tab on a student's profile.

Key Considerations:

Activity Stream: All sent messages are recorded in the Student History tab on a student's profile.

Permissions: Only users with appropriate security roles are permitted to send ad hoc engagements or roster messages.