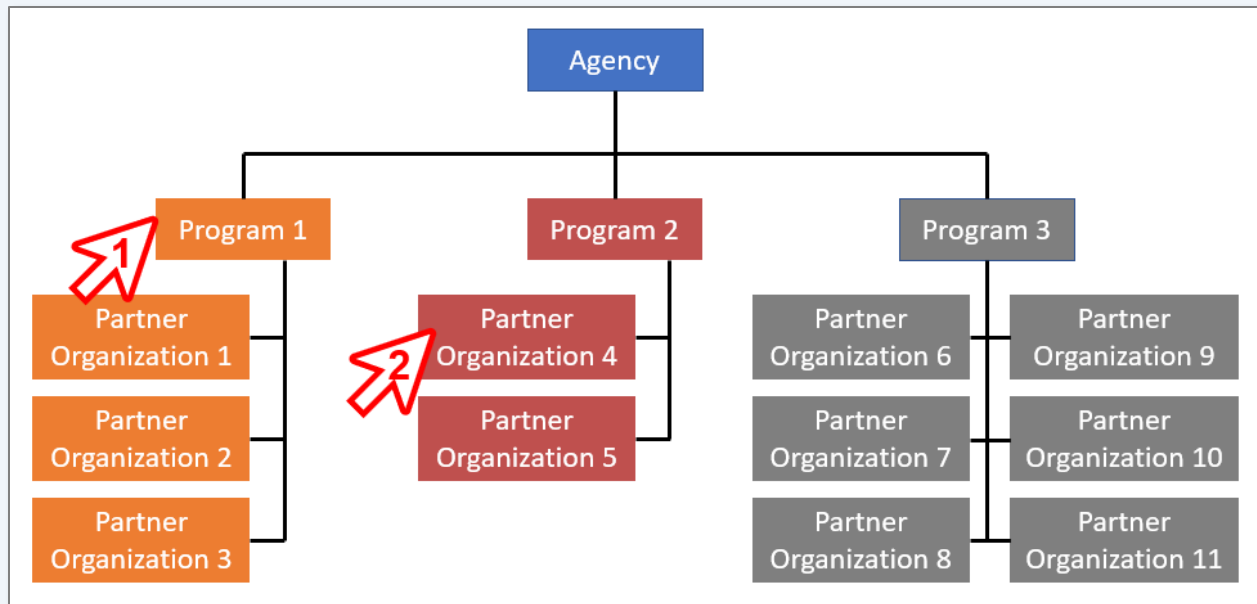


Mass Enroll EELearners in Training Affiliation Manager Training

Objective: This article provides step-by-step instructions of how an Affiliation Manager can enroll one or more EELearners (aka, Extended Enterprise Learners) in a Workday training.

Why this is important to you: Your organization may require members to take training in Workday. Rather than ask learners to search for courses in Workday or follow a link in an email, an Affiliation Manager can assign Workday courses or programs to members of their organization through this process. Assigned training then shows up on the EELearner's Workday dashboard for easy access to the course.

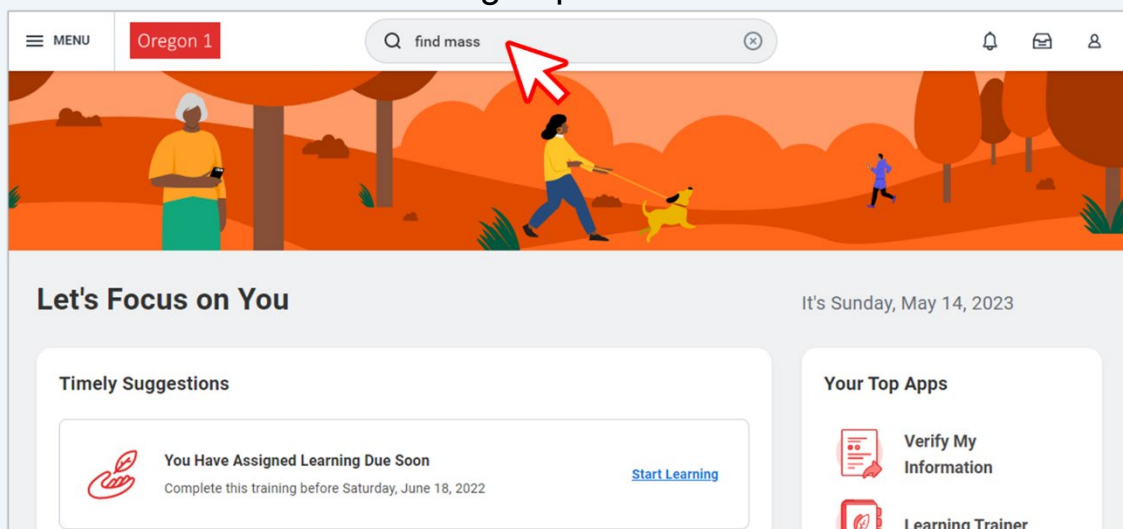
Terms: To understand your abilities as an Affiliation Manager in this task, it's important to understand the terms *upstream* and *downstream* in the context of your role. As an Affiliation Manager, you sit at a particular spot in an agency's organization chart. You have parts of the org chart above you – or *upstream*, and parts of the org chart below you – or *downstream*. In your Affiliation Manager role, you can only see and change things downstream from you. You cannot see anything upstream from where you serve. For example, if you are an Affiliation Manager at position 1 in the illustration shown below, then you can see and edit EELearners in the three partner organizations downstream of you. If you are at position 2, you are already in a most downstream category; you can only edit EELearners in your partner organization.



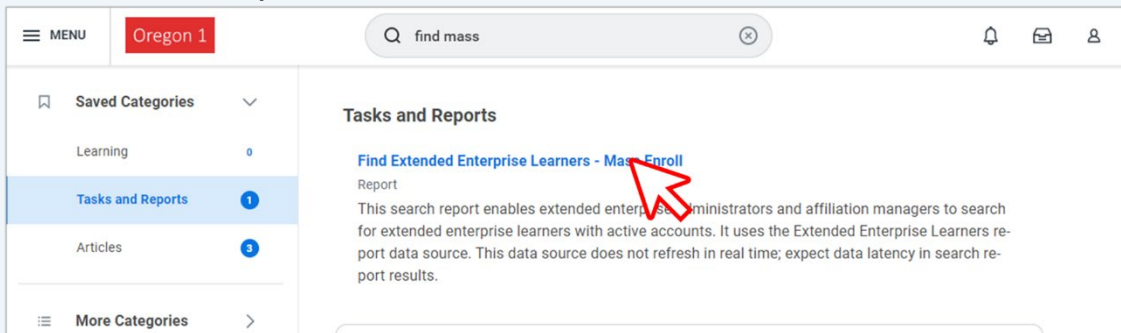
Navigate

From anywhere in Workday,

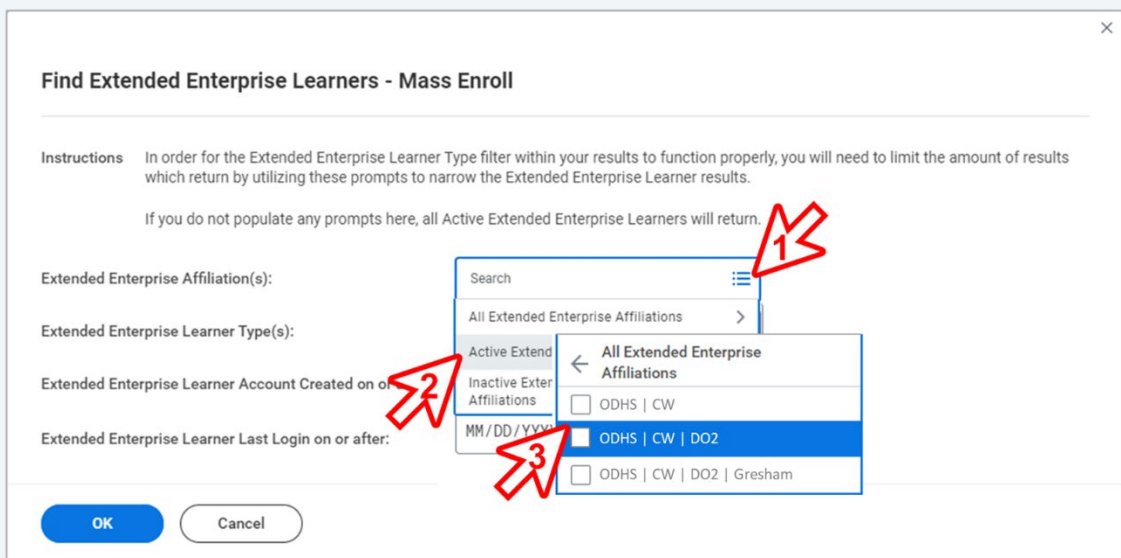
1. Click in the search bar at the top of the page and search for *Find Extended Enterprise Learner – Mass Enroll*. Use the mass enroll task to enroll either individuals or groups.



2. From search results under *Tasks and Reports*, click the link *Find Extended Enterprise Learner – Mass Enroll*.



3. From the screen *Find Extended Enterprise Learners – Mass Enroll*, 1) click the three-bar icon at the far end of the *Extended Enterprise Affiliation* field, 2) click *Active Extended Enterprise Affiliations* from the drop-down menu, then 3) click your sub-affiliation. With your sub-affiliation checked, click the *OK* button.



Note that you will only be able to see sub-affiliations at or downstream of your sub-affiliation. From the example shown above, it can be reasoned that this Affiliation Manager is at *ODHS | CW* in their sub-affiliation. This gives them the ability to also see *ODHS | CW | D02* and *ODHS | CW | D02 | Gresham* which are both downstream from them.

4. This will open the *Find Extended Enterprise Learners – Mass Enroll* screen.

Find Extended Enterprise Learners - Mass Enroll

Extended Enterprise Affiliation(s): ODHS | CW | DO2 - Affiliation

Search

Saved Searches

Current Search

Save Clear All

Extended Enterprise Learner

- ☐ Sandy Beach [E] (1)
- ☐ Miguel Torres [E] (1)
- ☐ Ima Learner [E] (1)
- ☐ Chris Massey [E] (1)
- ☐ Casey Hummer [E] (1)

Extended Enterprise Affiliation

- ☐ ODHS | CW | DO2 - Affiliation (5)

Learner Account Created

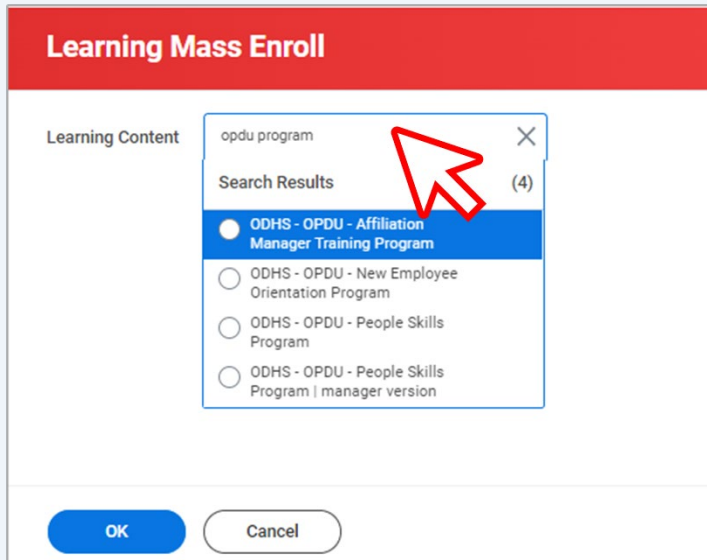
- ☐ 1 Day ago (5)

5 Results | 3 selected

- ☒ Chris Massey [E]
ODHS | CW | DO2 - Affiliation
- ☒ Sandy Beach [E]
ODHS | CW | DO2 - Affiliation
- ☒ Casey Hummer [E]
ODHS | CW | DO2 - Affiliation
- ☐ Miguel Torres [E]
ODHS | CW | DO2 - Affiliation
- ☐ Ima Learner [E]
ODHS | CW | DO2 - Affiliation

Learning Mass Enroll (Extended E...

- 1) From the list of EELEARNERS in the *Results* section, select those to enroll in the course. Check the box at the top of the list to select all EELEARNERS.
- NOTE: If you can't find a specific colleague to enroll in a course, it's likely because they are incorrectly assigned to a sub-affiliation upstream from you. Contact an Affiliation Manager upstream from you for support. Be sure to include the name of the EELEARNER in question when you ask for help.
- 2) Click the *Learning Mass Enroll* button to continue.
5. This will take you to a screen to search for and select the Learning Content for your enrollment. It is recommended that you simply enter the name of the course in the search box and select it from the search results shown. You do not need to enter the type of course it is (digital, blended or program*). If you only know a portion of the course's title, enter as much as you know. Workday's smart search can often find a course from only a portion of the title. Select the course and click the OK button to continue.



*More terms to know: A **digital** course is an eLearning training that does not have a live instructor; digital courses can be taken whenever a learner wants to learn. A **blended** course is a training that includes a live instructor as at least one part of its training; blended courses are offered at a specific time and place and can be in a classroom or webinar. A **program** is a combination of courses packaged together.

- 6a. For Blended Courses: If you select a course that is a blended course in step 5, there will be an additional screen to complete before continuing to the next step. A blended course in Workday is one that includes a live instructor. Because it is a live course (either in a classroom, or a webinar like Zoom or MS Teams), you'll need to select an offering – that is, a specific date, time and possibly location for your learners' training. After clicking the OK button for a blended course in step 5 above, you will arrive at the *Course Offerings* screen. Follow these steps:

Course Offerings

Select an offering on the Open Offerings or In Progress / Closed tab.

Open Offerings In Progress / Closed

Open Offerings 3 items

Order	Select Offering	Start Date	End Date	Location	Instructor	Seats Available	Waitlist Available	Status
1	<input type="checkbox"/>	Wed, Sep 1, 2021, 9:00 AM Pacific Time (Los Angeles)	Wed, Sep 1, 2021, 10:00 AM Pacific Time (Los Angeles)	Albany OHA	John Gendron	0 out of 24		Open
2	<input checked="" type="checkbox"/>	Wed, Sep 8, 2021, 9:00 AM Pacific Time (Los Angeles)	Wed, Sep 8, 2021, 10:00 AM Pacific Time (Los Angeles)	Bend DHS 3rd Street	John Gendron	7 out of 24	No	Open
3	<input type="checkbox"/>	Wed, Sep 15, 2021, 9:00 AM Pacific Time (Los Angeles)	Wed, Sep 15, 2021, 10:00 AM Pacific Time (Los Angeles)	Corvallis DA Benton County	John Gendron	15 out of 24	No	Open

OK Cancel

- 1) Start by looking at the *Seats Available* column to find an offering with the number of available seats needed for your learners. Be aware that Workday allows Affiliation Managers to overbook an offering beyond the number of seats available. It is VERY important that you do not overbook an offering unless you first speak with the instructor.
 - 2) Next consider the date, time, and location of the offerings available. If the course is a webinar, a location will not be listed.
 - 3) Check the box of the offering you will enroll the learners in.
 - 4) Click the OK button to continue.
- 6b. For Digital Courses & Programs: If you select a digital course or a program instead of a blended course in step 5, go directly to step 7.

7. At the *Review* screen, continue to build the assignment.

Review

ODHS - OTD - Affiliation Manager Training Program

This program is required training for any ODHS partner EElearner requiring the elevated Workday learning role of Affiliation Manager.

Assign as Required Learning

☒ Yes **1**
☐ No

Due Date

Due Date Type **2**
select one
select one
Date
Duration

Extended Enterprise Learners **3**
Ineligible

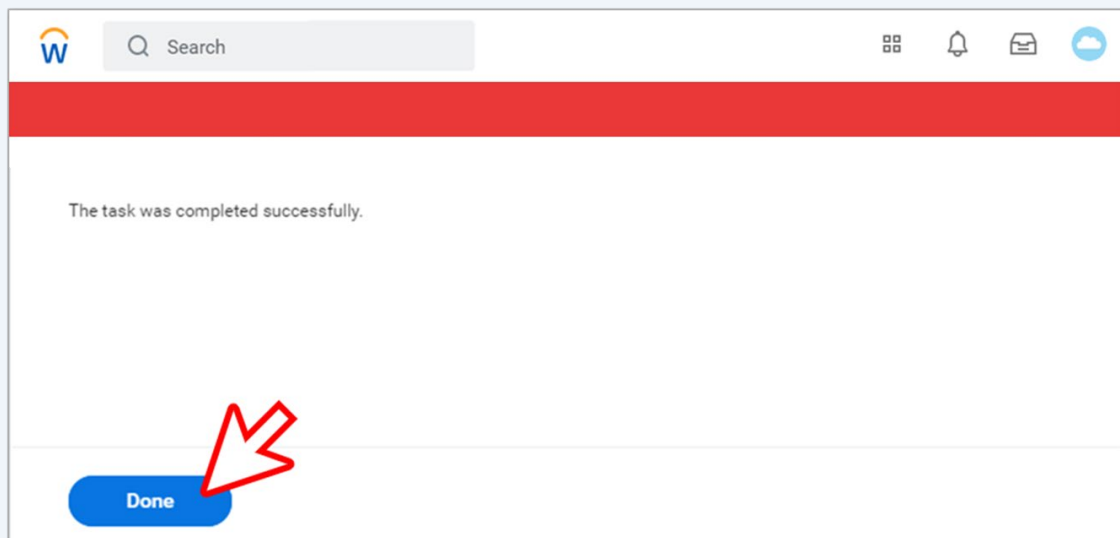
Extended Enterprise Learners 4 items | 3 selected

<input checked="" type="checkbox"/>	Photo	Name	Location	Warning
<input checked="" type="checkbox"/>		[REDACTED]		The learner has previously completed this content. You're re-enrolling [E] in the content. 4
<input checked="" type="checkbox"/>		[REDACTED]		
<input checked="" type="checkbox"/>		[REDACTED]		
<input type="checkbox"/>		[REDACTED]		

5 **6**
OK Cancel

- 1) A course can be assigned as required learning by selecting *Yes* in this section. If the course is assigned as required, it will appear in the *Required for You* tile of the EElearner's Workday Learning dashboard. If the *No* option is selected, the course will appear in the *Continue Learning* tile of the Learner's Workday Learning dashboard.
- 2) If the course is assigned as required, the *Due Date* option appears to the right. The due date can be either a specific date, or a length of time from when the assignment is created (duration). By setting a due date, when the required training is past due an *Overdue* notice will appear in the EElearner's *Required for You* tile as well as on the course as a reminder.
- 3) There may be individuals selected from step 4 above who are ineligible to take this course. Click this tab to see the list of those individuals. These are usually individuals who are already enrolled in an offering of this course and cannot be enrolled again until they've completed the first offering.
- 4) If an EElearner has already completed the training, a *Warning* column will appear, and a message will show. Training can be reassigned if desired.

- 5) Refine your selection of EELearners to participate in this assignment. Check the box at the top of the left-most column to select all EELearners; deselect individuals as needed.
- 6) Click the *OK* button to continue.
8. You will receive a screen notice that you've successfully enrolled the learners in the training. Click the *Done* button.



You have successfully enrolled one or more learners in a training.

NOTE: It's important to understand the following functions of Workday when mass enrolling a learner in training:

- If you mark a course as *Required* when enrolling an EELearner, the requirement will need to be waived before the EELearner or anyone else can drop the offering for the EELearner. Contact an Affiliation Manager upstream from you for support. Be sure to include the name of the EELearner and the course and offering (date/time) to be waived when you ask for help.
- An EELearner must drop themselves or be dropped from a course's offering they're enrolled in before they can re-enroll in the same course on a different day.