Workday Basics

Employees

For employees looking to learn about Workday Basics, this document will guide you through the following tasks and processes:

Accessing Workday
How to log on to Workday.

Common Workday Terms
Definition of terms commonly used in Workday.

Workday Navigation Overview
How to find and use the following Workday features: Search Function, Applications, My Tasks Inbox, Workday Notifications.

Viewing Your Org Chart
How to access a hierarchical overview of your organization, including your peer colleagues and supervising Manager.

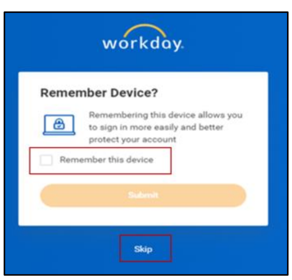
Accessing Workday

1. To navigate to Workday, click the Workday link here. You will be prompted to sign in using your Medline single sign-on (SSO) credentials.

   Commented [DVT1]: Medline – this is a placeholder to link Medline Final Tenant

   Placeholder for SSO sign-in screenshot

2. Once you have successfully logged in, select either **Skip** or **Remember this device** to continue to your Workday Homepage.

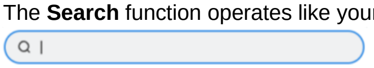


Common Workday Terms

Here are some of the common terms you will encounter as you start to use Workday.

- **Actions** are indicated with an **Ellipses** icon with three dots ( ), or an **Actions** button (Actions). The **Ellipses** icon appears when you hover over an object highlighted in blue to indicate a hyperlink, such as a name or a job title. Both the **Ellipses** icon and the Action button provide navigational shortcuts to activities you can complete without having to return to your Workday Homepage.

- The **Search** function operates like your favorite search engine.



- A **Mandatory** Field – indicated by a red asterisk (*) – indicates a Workday field that cannot be skipped or excluded when entering data.

- **Applications** are the icons that appear on your Workday homepage. Each application provides a gateway to a different area of Workday, such as Talent and Performance or Personal Information. Applications are sometimes referred to as **Worklets**.

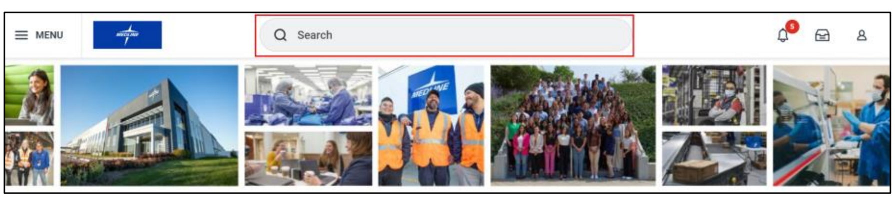
- **Errors** and **Alerts** help guide you through Workday processes by appearing on-screen when required information is missing. Depending on the type of missing content, you may or may not be able to continue the process until you have fixed the issue.

Workday Navigation Overview

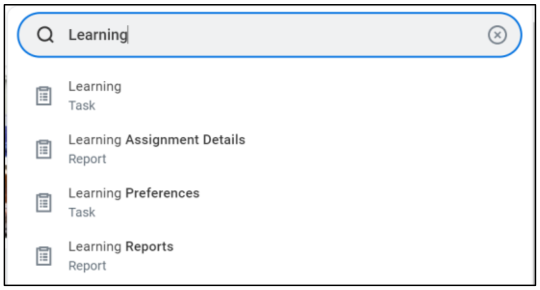
Search Function

You can use the **Search** field to find information in Workday.

1. Locate the **Search** field at the top of your screen.

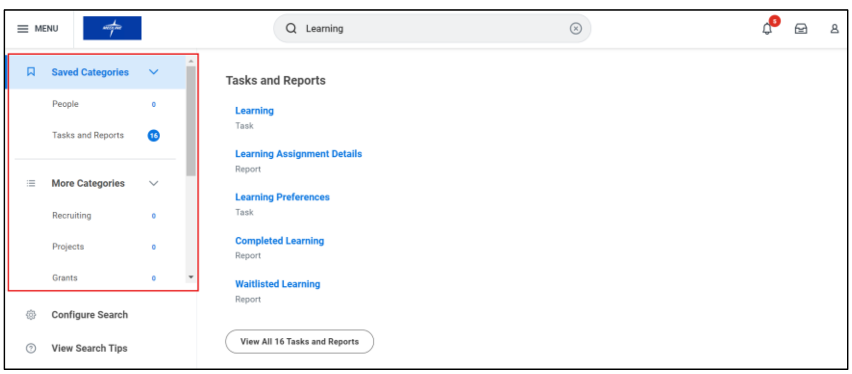


2. Type the topic you are looking for into the **Search** field. As you type, Workday will filter your request and offers several of the most common search results in a drop-down menu.



Please note that you will not need to type the whole word or phrase, but you will still need to spell your entries correctly.

3. Select one of the results from the drop-down menu, or press **Enter** on your keyboard to display the search results in a separate window. You can use the **Categories** list in the left-hand menu to narrow the focus of your search. Note, the information you see in Workday is based on your role and data that is useful and relevant to you.



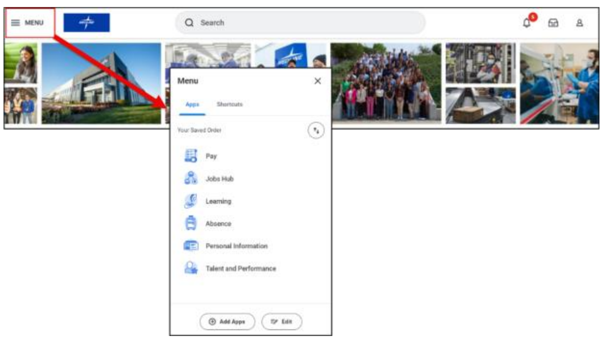
Please note that there are many ways to find the same information in Workday, depending on what you prefer. You can use **Applications**, your **Workday Profile**, the **Actions** icon, or the **Search** field.

Remember, if you get lost at any time, you can always return to your Workday Homepage from any page by clicking the Workday Logo in the upper left-hand corner of your screen.

Applications

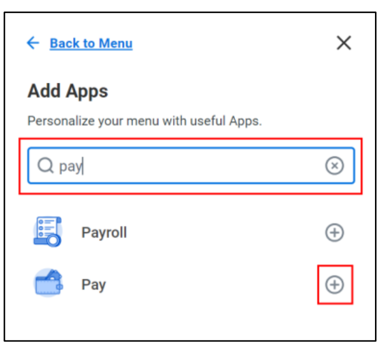
An **Application** is a compact report displayed as a “tile” on a Workday page, providing easy access to tasks and information you use on a regular basis. You can think of an application like the icons on your computer, tablet, or smartphone that you use to load a program or application.

1. When you log in to Workday, you will automatically be directed to your Workday Homepage. The menu on the left-hand side of the Homepage will show your applications. You can choose to personalize your Homepage to display the applications you want – similar to the way you would display apps on your phone.

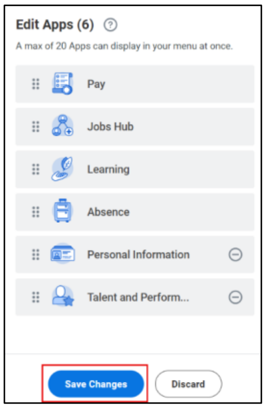


2. Click **Add Apps** or **Edit** to customize your options.

3. Clicking **Add Apps** allows you to find applications. Type the name of the application you want then click the **Add** icon (**+**) to add the application.



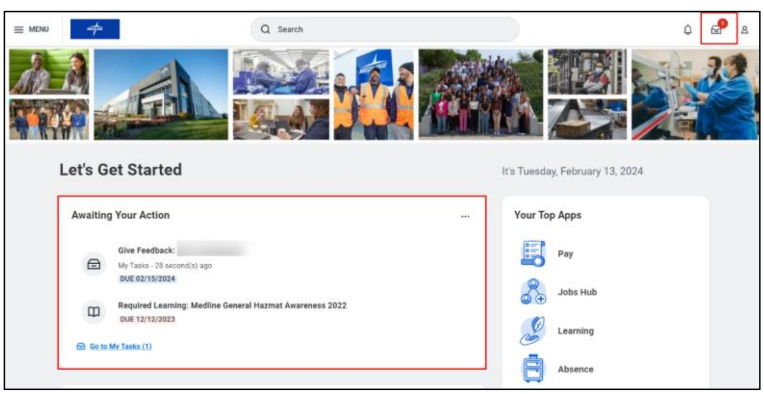
4. Clicking **Edit** allows you to reorder the applications you have. Hold down your mouse button and drag the application to reorder it. Once you have made your changes, click **Save Changes**.



Managing Your Workday My Tasks Inbox

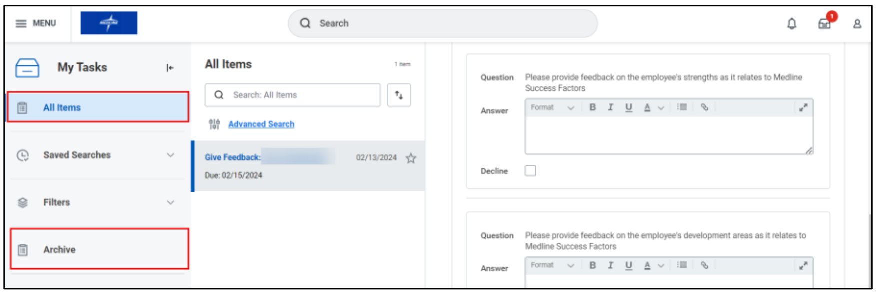
Your Workday **My Tasks Inbox** includes tasks, due dates, and other items sent to you as part of a business process. Actions can be completed from your Workday **My Tasks Inbox**, while notifications are purely informational.

1. Once logged in to Workday, you will be taken to the Homepage. You can navigate to your **My Tasks Inbox** by clicking **Go to My Tasks** on the left-hand side of the screen, or by clicking on the **My Tasks Inbox** icon in the top right-hand corner of the screen.

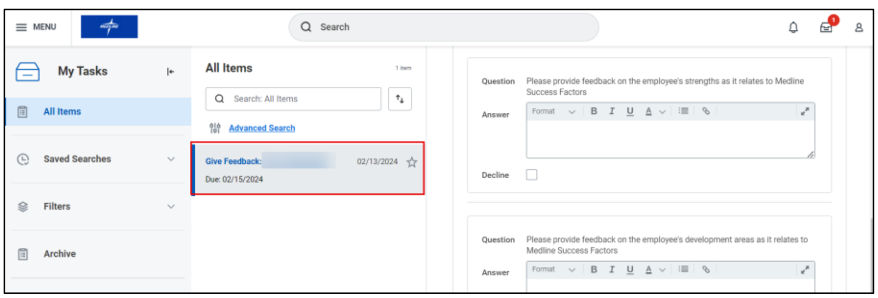


2. Your **My Tasks Inbox** is made up of an **Actions** section and an **Archive** section. Each item in your **Actions Inbox** is a task you need to act upon to complete a business process. Think of it

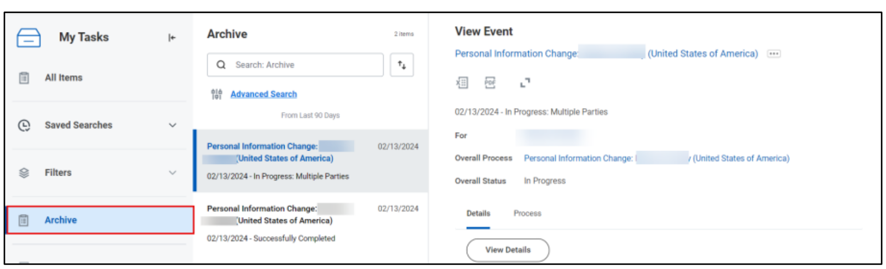
as a Workday “to-do list.” Once you complete a task from your **Actions Inbox**, the task will be moved to the **Archive Inbox** for your records.



3. To view and complete a task, click the task on the left-hand side of your **My Tasks Inbox**. The task will open on the right-hand side of the screen. Click on the **Expand** icon ( ) in the top of the page for easier viewing. In the example below, you would type your feedback directly in the prompted fields to complete the task.

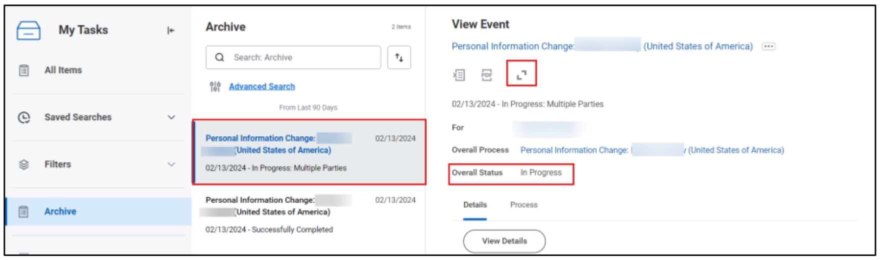


4. Once you complete a task from your **Actions** Inbox, the task will be moved to the **Archive** Inbox for your records. To see your archived tasks, click the **Archive** tab.

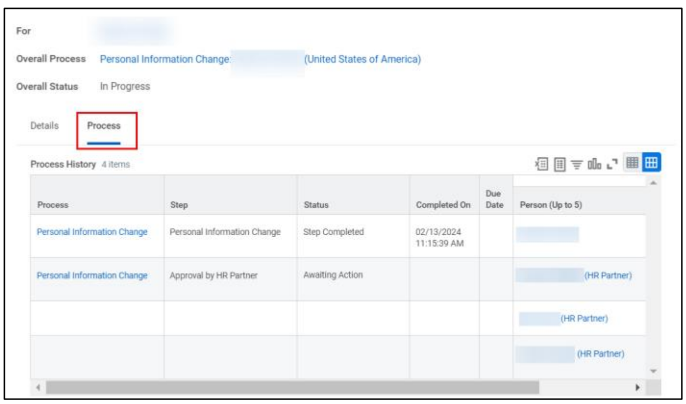


5. To view an archived task, click the task on the left-hand side of the screen. It will open on the right-hand side of the screen. Again, you can click the arrows ( ) to expand the screen. You

can also see the overall status of various processes, for example if they are **Successfully Completed**, **In Progress** or **Canceled**.



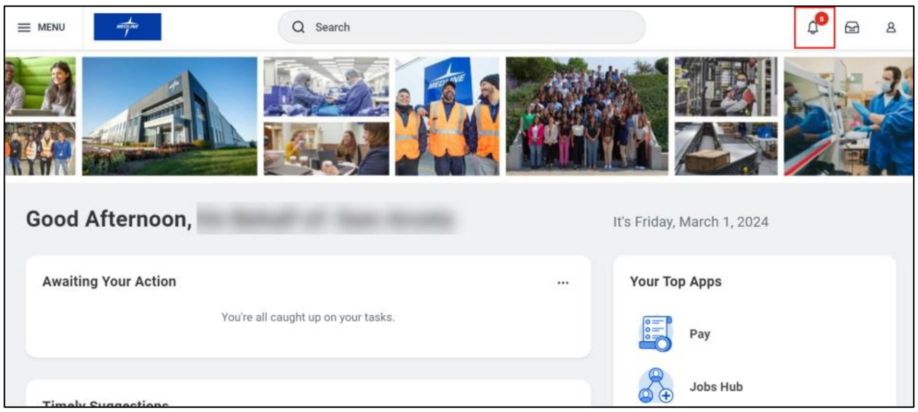
6. You can also see the details of the request and the Process History under the **Process** tab. This function can be helpful for requests that are In Progress.



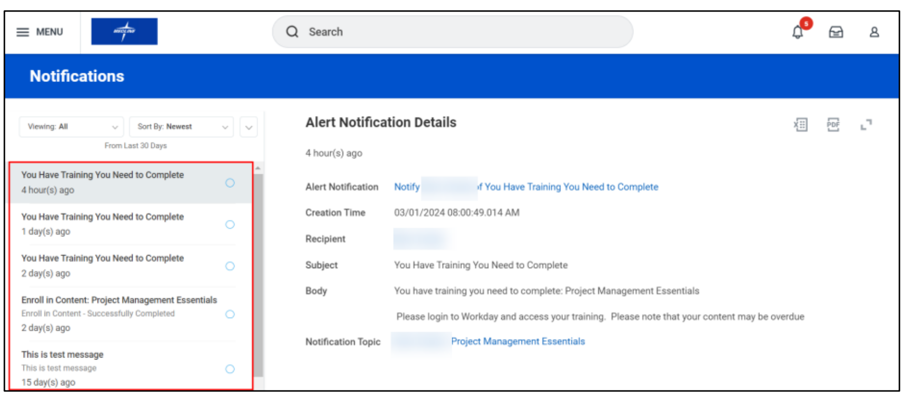
Managing your Workday Notifications

As noted above, actions can be completed from your **My Tasks Inbox**, while **Notifications** are purely informational. Workday **Notifications** will update you on the status of a business process.

1. From your Workday Homepage, locate and click on the bell-shaped **Notifications** icon in the top right-hand corner of the screen.

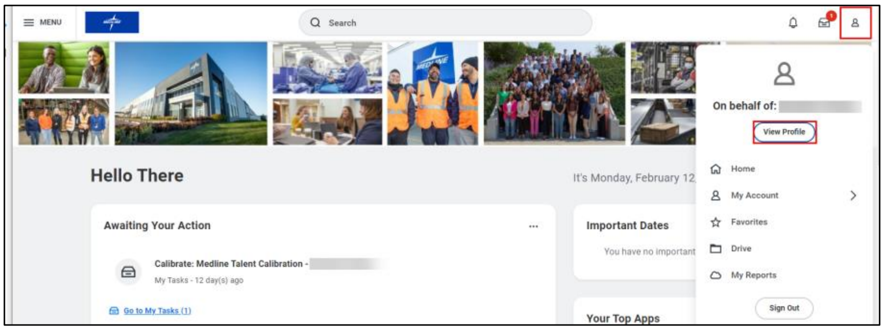


2. You will be brought to the **Notifications** page. From here, you can view your notifications on the left-hand side of the screen. Click the notification to open it on the right-hand side of the screen.

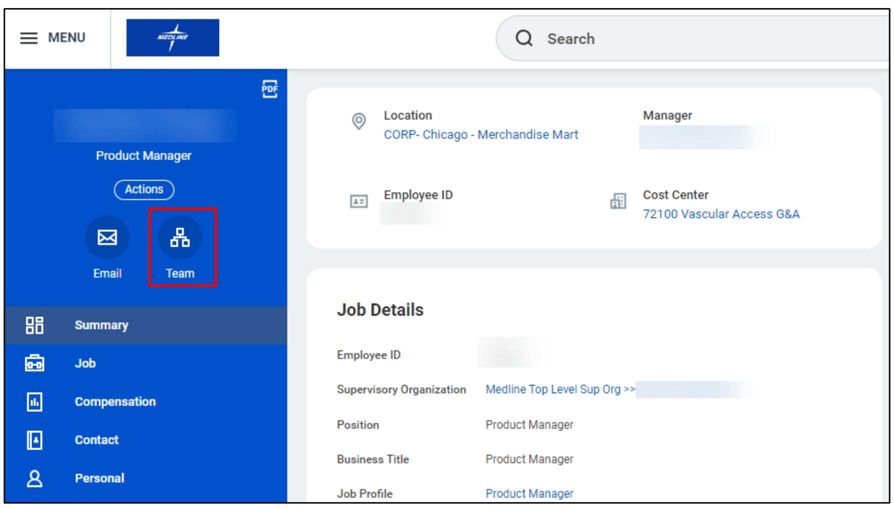


Viewing Your Org Chart

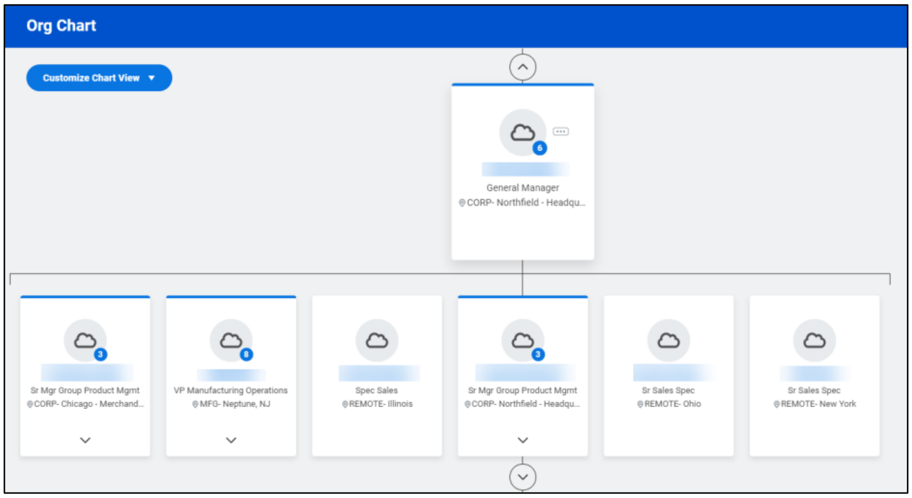
1. Click the **Avatar** icon ( ) in the top right-hand corner, then click **View Profile**.



2. From your **Profile** page, you can access an **interactive organization chart** by clicking on the **Team** icon at top of the blue sidebar.



3. Once selected, the **Org Chart** will show you a hierarchical overview, including your direct reports (if any), peer colleagues and supervising manager.



Please note that you can scroll up and down to see the full reporting structure. Managers have a blue circle showing the number of direct reports on their team.