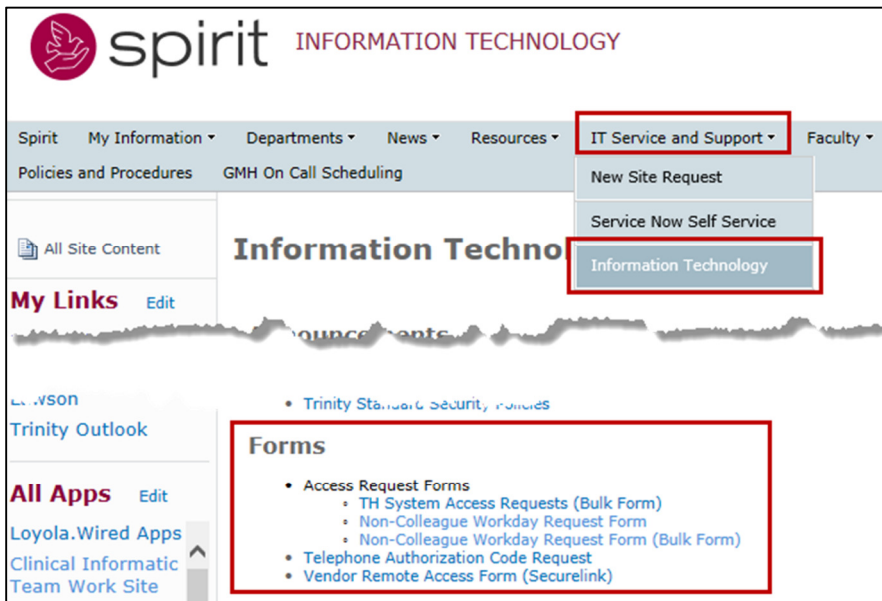


# Onboarding with Workday: Instruction Sheet #1

## Request a Non-Colleague Workday Number

This document is intended to show Managers the process to request a Workday number for Non-Colleagues (Consultants, Auditors, Students, Research Monitors, Visiting Residents, Agency Nurses, Contractors, etc.) using Service Now Self Service.

- If you have already obtained a Workday number for your Non-Colleague, please refer to *Instruction Sheet #2: Submit a Non-Colleague Access Request* (Spirit > IT Service and Support > Information Technology > Knowledge Base).
- Go to Spirit. Under **IT Service and Support**, click **Information Technology**.
  - Find the **Forms** section of the Information Technology Spirit page.

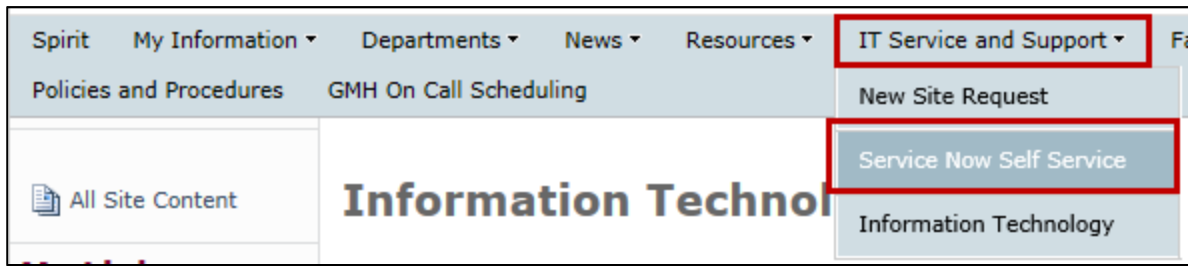


- Select *either* **Non-Colleague Request Form** or **Non-Colleague Bulk Request**, depending on the number of new colleagues needing Workday numbers.

If you have:	Single Request (1-4 new non-colleagues)	Bulk request (5 or more new non-colleagues)
Select the:	<b>Non-Colleague Workday Request Form</b>	<b>Non-Colleague Workday Request Form (Bulk Form)</b>
Complete:	One form for <u>each</u> non-colleague	One form for <u>all</u> non-colleagues

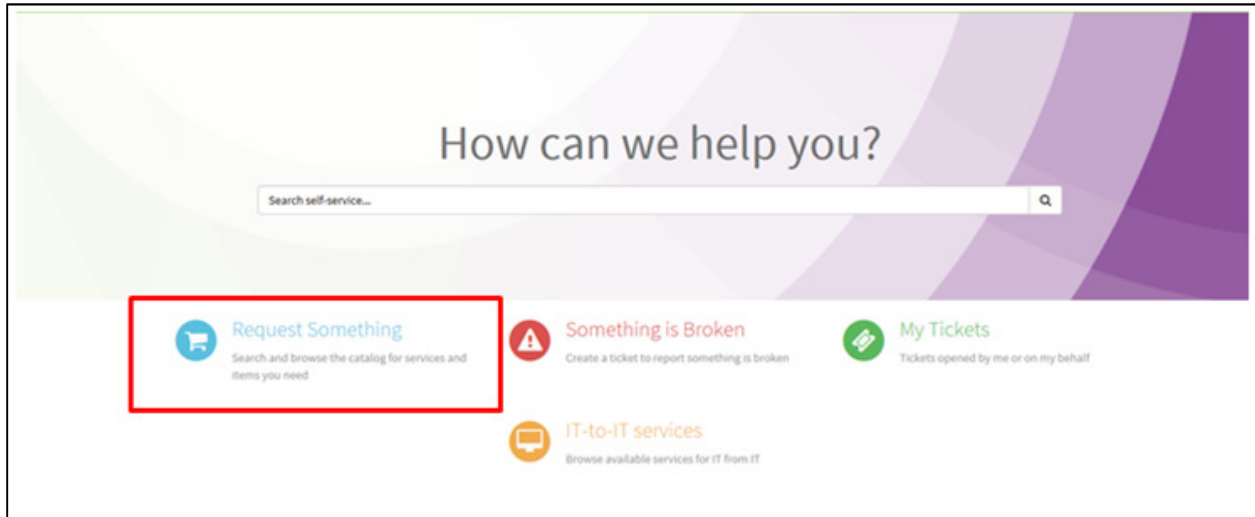
- Complete the form(s) and Save when finished.
  - If the colleague needs advanced access to Healthstream, the "Contract Start Date" should be the date access is needed to Healthstream.
    - E.g. a non-colleague needs to complete Healthstream modules prior to starting clinical rotation
  - You will attach the completed form(s) to the Service Request later on.

5. From Spirit, go to **IT Service and Support** click **Service Now Self-Service**.

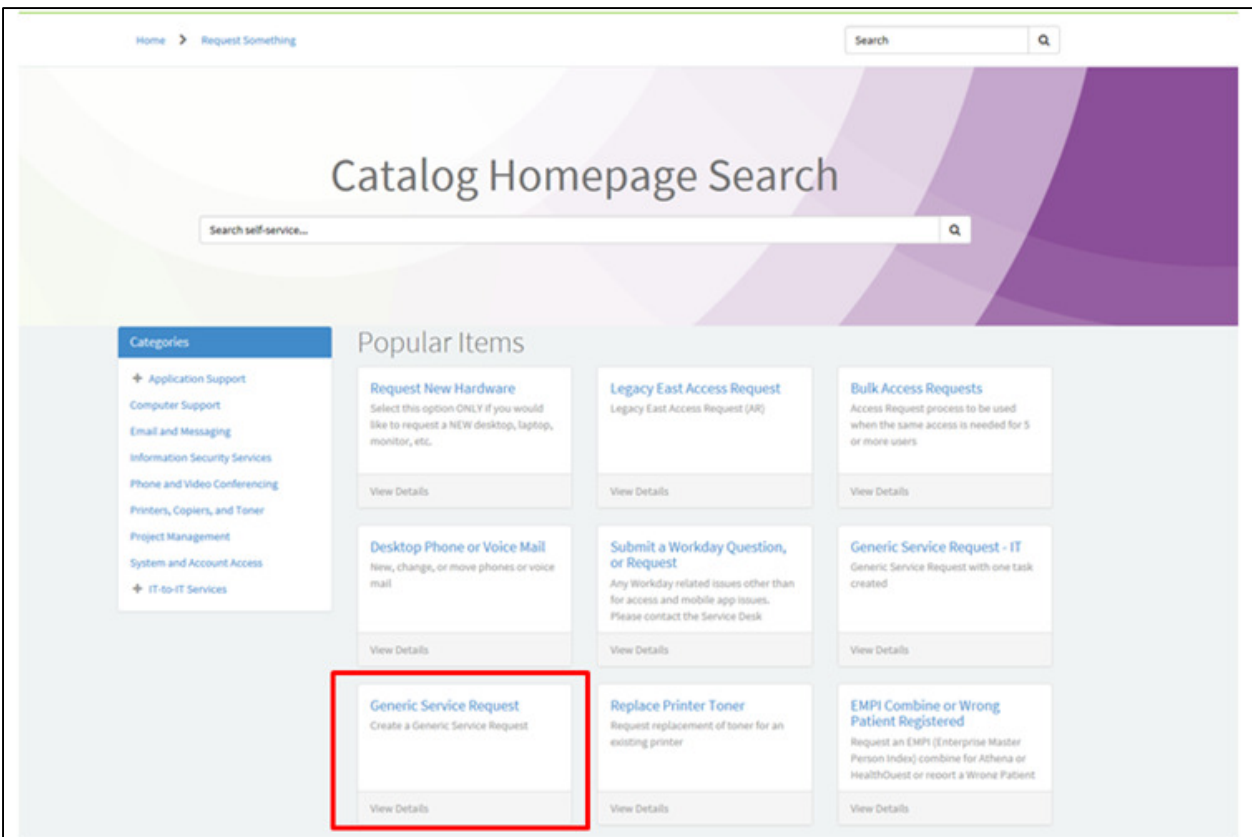


6. Log into Service Now with your username and password.

7. Select **Request Something**.



8. Select **Generic Service Request**.



9. Fill out the Service Request (*one request for **each** colleague unless it is a bulk request*)
  - a. **Request Area:** IT Security
  - b. **Request Subarea:** IT Security
  - c. **Short Description:** Non-Colleague Workday number request
  - d. **Needed by:** Click the calendar button to the right to choose the date/time
  - e. **Additional Comments:** enter the Non-Colleague's name and a note to "Please see attached for additional details".
    - For bulk requests, you do not need to list out the name of every non-colleague in the "Additional Comments section—just include the note: "Please see attached for details".
      1. For a bulk request (5 or more non-colleagues), you will only need to create one Service Request and enter "Please see attached for details" in Additional Comments.
    - For a single request (1-4 non-colleagues), you will submit a separate Service Request form for each non-colleague.

The screenshot shows the 'Generic Service Request' form. The title is 'Generic Service Request' with a subtitle 'Create a Generic Service Request'. The form contains several input fields and buttons, each highlighted with a red box:

- Request Area:** A dropdown menu currently showing '-- None --'.
- Request Subarea:** An empty dropdown menu.
- Device ID:** An empty text input field.
- Short description (Max 80 Characters):** An empty text input field.
- Needed by (Time is in 24 hr format):** A date and time picker field.
- Additional comments:** A large text area with expand/collapse arrows.
- Specify any confidential (Protected) details:** A text area with expand/collapse arrows.
- Should attachments be considered confidential? (Protected):** A dropdown menu currently set to 'No'.
- Add to Cart:** A button located at the bottom left.
- Add attachments:** A button with a paperclip icon, located at the bottom right.

At the bottom of the form, there is a 'Required information' section with a progress bar showing that 'Request Area', 'Short description (Max 80 Characters)', and 'Needed by (Time is in 24 hr format)' are required.

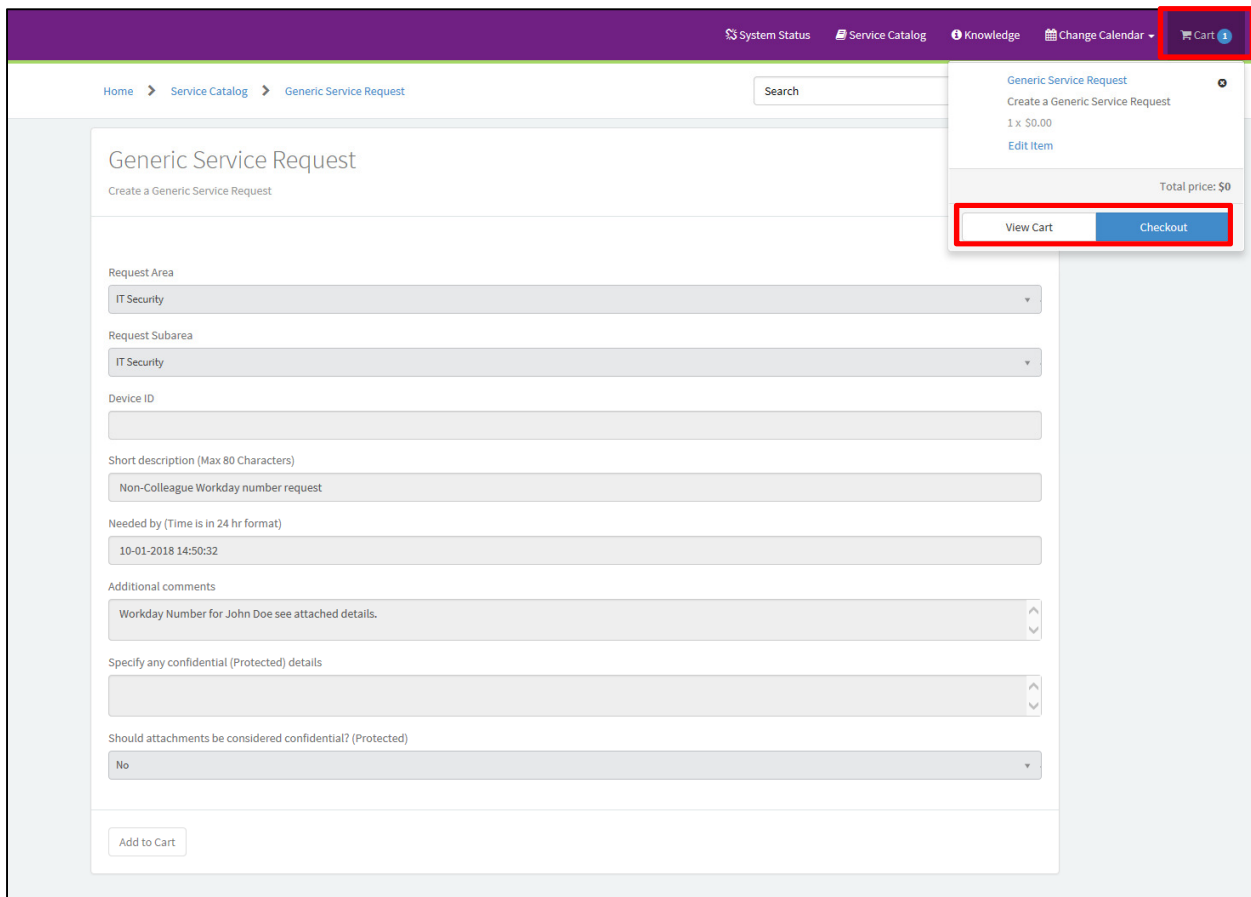
10. Attach the appropriate completed Non-Colleague form to your request by clicking the paper clip icon on the lower right-hand corner of the screen – **Add attachments**.
11. Select **Add to Cart**.

If you have:	Single Request (1-4 new non-colleagues)	Bulk request (5 or more new non-colleagues)
Complete:	One request for <u>each</u> non-colleague	One request for <u>all</u> non-colleagues
Attach the:	The completed Non-Colleague Workday Request Form	The completed Non-Colleague Workday Request Form (Bulk Form)
In Additional Comments, include:	<ul style="list-style-type: none"> <li>Non-colleague's name</li> <li>"Please see attached for additional details"</li> </ul>	<ul style="list-style-type: none"> <li>"Please see attached for details"</li> </ul>

12. Once **Add to Cart** is selected, the item will appear in your **Cart**.

13. Select **Cart > View Cart**.

a. **View Cart** is recommended before you Checkout.



14. In the Shopping Cart – View Cart, your name will appear in "Requested for" and your Manager will appear in "Requestor Manager" by default. Select **Checkout** to complete the request.

The screenshot shows a web interface for a shopping cart. At the top, it says "Your Cart". Below that is a table with columns: Product, Price, Quantity, and Subtotal. The table contains one item: "Generic Service Request" with a price of \$0.00, a quantity of "-", and a subtotal of \$0.00. To the right of the item are two icons: a blue pencil and a red trash can. Below the table, it says "Total price: \$0".

Below the table is a form with several fields, each with a red asterisk indicating it is required:

- \* Requested for: CHARLENE TATES (with a dropdown arrow and a close 'x' icon)
- \* Requester Manager: Tom Bunger (with a dropdown arrow and a close 'x' icon)
- \* RHM: Loyola University Medical Center (with a dropdown arrow and a close 'x' icon)
- \* Location: MW-LUMC (with a dropdown arrow and a close 'x' icon)
- \* Phone number: 708-216-9034

At the bottom of the form are three buttons: "Continue Shopping", "Clear Cart", and "Checkout". The "Checkout" button is highlighted with a red rectangular box.

Your request will be assigned to the MW-Non-Colleague team in Service Now. A Workday number and 4x4 for the Non-Colleague(s) will be created. You will receive an email confirmation when this is complete and the Workday number and 4x4 will be available to you in Workday. **This may take up to 3 business days.**

- Once you have the Workday number and 4x4, proceed to: *Instruction Sheet #2: Submit a Non-Colleague Access Request* to request application access.