

workday Training for Employees



2014



Our Beliefs

Respect

Collaboration

Excellence

Integrity

Community



Meeting Guidelines

- Stay Engaged
 - You will get out of it what you put into it!
- Eliminate Distractions
 - Take a break from your phone
 - Laptops—please keep closed until group / hands-on activity
- Timekeeping
 - Facilitator will keep us on track
- Stay Focused
 - **workday** is a global initiative eventually impacting all BorgWarner employees
- Parking Lot / Action Items
 - Review before closing—HR to follow up

How We Will Spend Our Time Today

- **One Hour training for employees:**
 - Overview: 5 minutes
 - Training Presentation and Demonstrations: 30 minutes
 - Hands On Session: 15 minutes
 - Questions: 5 minutes
 - Wrap-up: 5 minutes

What We Will Cover During Training

- Today, you will be shown how to:
 - Log in to **workday**
 - Navigate the system
 - View and change your personal information
- We'll also talk about:
 - Key dates and upcoming communication
 - Resources available to you
 - Where to go for additional support and resources
 - **Appendix: Benefits**

workday Training Objectives

- Introduce you to **workday**
- Understand the reasons for the system and your role
- Understand what's changing and what's not changing
- Be able to complete key transactions using **workday**
- Know where to go for support

HRIS = Human Resources Information System

- **workday** will be the single, global HRIS for:
 - Borg Warner **Master Data Record** of information for all BW employees
 - **Benefits Management** for BorgWarner benefits
 - Global **Compensation Management**
 - Employee and Manager **Self Service Functionality**

Why **workday**?

Enhancing Your workday for the Road Ahead

- Helps us be a **technology leader** using leading technology
- Serves as an **easy to use portal** for accessing your personal information
- **Enhances accuracy** when you enter and manage your own data
- **Makes it easier** for you to change your **personal information**
- **Makes it easier** for you to **enroll and change benefits** as needed
- Allows us to be **green** by minimizing paper traffic

What's NOT Changing and What IS?

What's NOT Changing	What IS Changing
Your information is secure and confidential	You manage your own personal information
You must make sure your personal information is up-to-date	You can view your Inbox and make changes to your personal information from anywhere you can open a browser
HR and your manager must approve transactions	How HR and your manager approve transactions
You must provide supporting documentation to HR for requested changes to your personal information	Documentation will be updated through workday

Employees Please Note!

- BorgWarner adheres to all Employee Information Privacy and Security laws, policies and guidelines
 - ALL employee related information is **private and confidential**
- The **workday** system will host HR related employee information in a secure, on-line environment
 - Mitigates compliance and legal risks through electronic information security
- The **workday** system will help automate
 - Updates of all Personal Information
 - Benefits Enrollment and Management

Enhancing your **workday** for the road ahead



Logging-In & Navigation

Logging in to **workday**

- Access the BorgWarner **workday** site at:
 - <https://wd5.myworkday.com/borgwarner/login.flex>

The screenshot shows the Workday login interface for BorgWarner. At the top is the Workday logo. Below it is the 'Sign In to Workday:' section with input fields for 'User Name' and 'Password', a 'Sign In' button, and a 'Change Password' link. To the right is the BorgWarner logo and a welcome message: 'Welcome to the Workday System! If you have any questions or need assistance, please contact your local Human Resources department.' Three yellow callout boxes provide instructions: 'Step 1: Enter your User Name provided to you by HR' points to the User Name field; 'Step 2: Use the password provided to you by HR (case sensitive)' points to the Password field; 'Step 3: Click Sign In' points to the Sign In button. An 'Optional' callout points to the Change Password link, stating: 'Optional: To change your password after first login, select "change password"'. The BorgWarner logo is also present in the bottom left corner of the slide.

Step 1: Enter your User Name provided to you by HR

Step 2: Use the password provided to you by HR (case sensitive)

Step 3: Click Sign In

Optional: To change your password after first login, select "change password"

Navigating the System

The screenshot shows the Workday Home page interface. At the top, there is a blue header with a search bar on the left, the Workday logo in the center, and the user's name 'Donald Duck (013040)' and a profile picture on the right. Below the header, the word 'Home' is centered. The main area contains several circular icons representing different worklets: Quicklinks, Personal Information, Benefits, Directory, Self Service Training, Custom Reports, and Reports. Each icon is accompanied by a callout box with a yellow background and a black border, providing instructions on how to use that feature.

Search Box:
The Search box function works like a Google Search within Workday

Your Name:
Select Your Name to change your password, preferences or challenge questions, view your profile and to Sign Out

Inbox:
Go to your "Inbox" for all pending "Actions and Notifications"

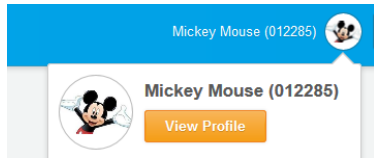
Quicklinks:
Go to the Quicklinks worklet to link to other HR Systems and websites

Benefits:
Go to your "Benefits" worklet to review elections and monthly cost

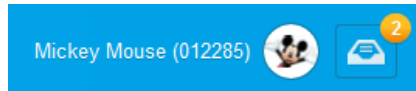
Self Service Training:
Go to the Self Service Training worklet to view training videos on Workday

Personal Information:
Go to your "Personal Information" worklet to view and change general employee information

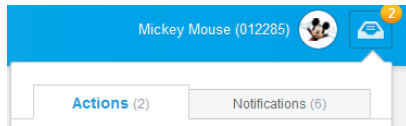
Navigating the System *(cont'd)*



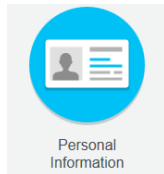
Available to all employees; provides your profile, personal information, benefits data, password, preferences and more



All transactions that require action



Side-by-side view of action items from your Inbox (actions) and messages to review (notifications)



Where you can view and change your personal information

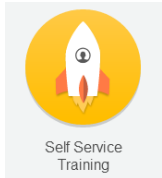


Where you can view your benefit elections and monthly costs

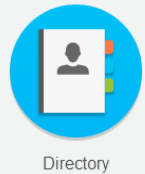
Navigating the System *(cont'd)*



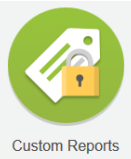
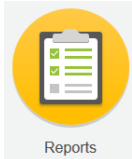
Quicklinks provide links to other sites and systems – such as BorgWarner Benefits, eLearning, Concur for expense reports, ADP for payroll, TMS for Talent Management System and Carlson Wagonlit for travel



Self Service contains short training videos for employees and manager on workday



Directory provides views of organizations, charts, locations, workers, managers and more



Reports and Custom Reports provides additional information within workday based on your security

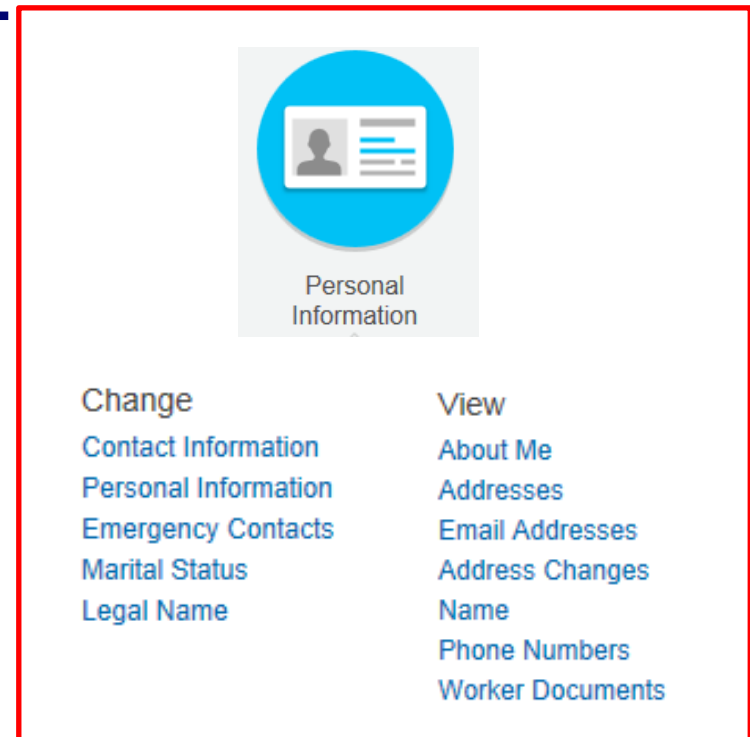
Enhancing your **workday** for the road ahead



Personal Information

Changing Personal Information

- From your Personal Information icon, you will change your:
 - Contact information
 - Emergency contacts
 - Marital status
 - Legal name
- You can also view additional personal information



Changing Personal Information (cont'd)

■ Contact information

My Contact Information

Mickey Mouse (012285) ...



Edit

Click on the "Edit" button to update your contact information

Home Contact Information



Address	Usage	Visibility	Shared With	Effective Date
231 Main Street Auburn Hills, MI 48326 United States of America	Home (Primary)	Private		02/14/2014

Work Contact Information



Address	Usage	Visibility	Effective Date
3850 Hamlin Road Auburn Hills, MI 48326 United States of America	Business (Primary)		04/30/2007



Email Address	Usage	Visibility
mickeymouse@borgwarner.com	Work (Primary)	Public

Changing Personal Information (cont'd)

■ Contact information



Change Contact Information
Donald Duck (013040)

Please make sure to enter a Primary Home Phone.

Review your contact information and enter any changes or additions.

Home Contact Information

Primary Address Address 345 Main Street, Auburn Hills, MI 4

Additional Address (+)

Primary Phone Phone +1 (810) 334-5173 (Telephone)

Additional Phone (+)

Primary Email (+)

Phone

Phone Device *

select one

Country Phone Code

United States of Am

Area Code

Phone Number *

Phone Extension

Done

Step 2: Add or update the information and select Done when completed

Step 1: Select the pencil icon to update your information

Step 1: Select + to add your information

Step 3: Once you've entered your contact data, click "Submit"

Save for Later allows you to keep your changes to come back and later and complete. These changes will NOT be sent to HR.

Cancel will remove any changes you have made and keeps the original information.



enter your comment

Submit

Save for Later

Cancel

Changing Personal Information (cont'd)

■ Personal Information

You will need to submit the required documentation to HR before any changes will take effect.



Change My Personal Information
Donald Duck (013040)

Change Personal Information

Gender: Gender Male

Date of Birth: Date of Birth 11/09/1979 Age 34 years, 3 months, 5 days

Marital Status: Marital Status Married (United States of America) Marital Status Date: / /

Disability:

Military Service:

enter your comment

Undo

Step 2: Add or update the information

Step 1: Select the pencil icon to update your information

Step 1: Select + to add your information

Step 3: Once you've entered your contact data, click "Submit"

Save for Later allows you to keep your changes to come back and later and complete. These changes will NOT be sent to HR.

Cancel will remove any changes you have made and keeps the original information.

Changing Personal Information (cont'd)

- Marital status

Enter the effective date of the Marital Status change

Marital Status

Marital Status

✕ Married (United States of America)

Marital Status Date

__/__/__

search

Divorced (United States of America)
Married (United States of America)
Partnered (United States of America)
Separated (United States of America)
Single (United States of America)
Widowed (United States of America)

Use the dropdown box to select your new marital status

You will need to submit the required documentation to HR before any changes will take effect.



enter your comment

Submit

Save for Later

Cancel

Changing Personal Information (cont'd)

- Legal name

Change My Legal Name

Donald Duck (...)

Country * United States of America

Prefix search

First Name * Donald

Middle Name

Last Name * Duck

Suffix search

Step 1: Use the dropdown box to select your country

Note: We do not use a Prefix

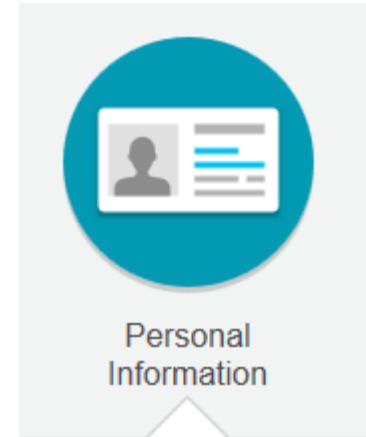
Step 3: Use the dropdown box to select your suffix: (Donald Duck Jr.)

Step 2: Enter your new name

You will need to submit the required documentation to HR before any changes will take effect.

Additional Information You Can View

- About Me
- Addresses
- Email Addresses
- Address Changes
- Name
- Phone Numbers
- Worker Documents



View

[About Me](#)

[Addresses](#)

[Email Addresses](#)

[Address Changes](#)

[Name](#)

[Phone Numbers](#)

[Worker Documents](#)

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Emergency Contact Update
(“Hands-On” Session)
Employee Updates
Personal Emergency Contact Info

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Step 1: Enter your User Name provided to you by HR

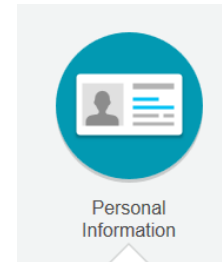
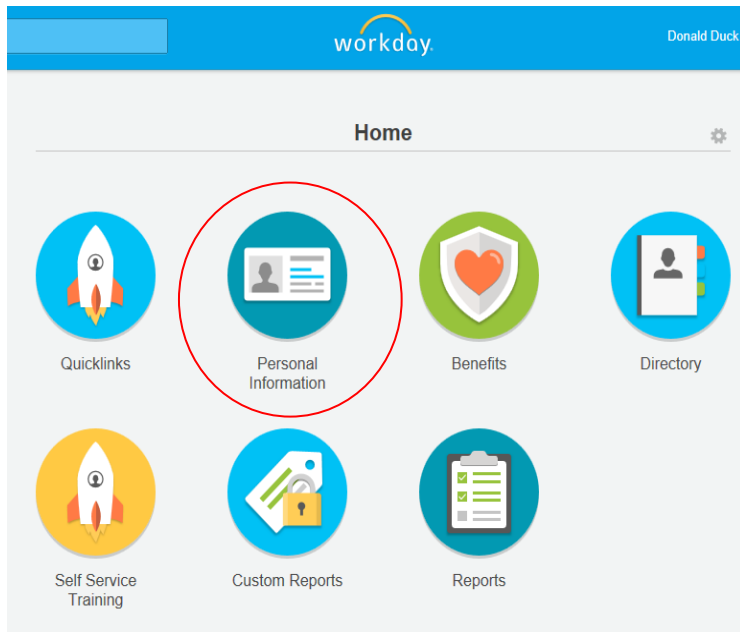
Step 2: Use the password provided to you by HR (case sensitive)

Step 3: Click Sign In

Optional: To change your password after first login, select "change password"

Personal Information

- From your “Home” page, you can view or change your “Personal Information”



Change

- [Contact Information](#)
- [Personal Information](#)
- [Emergency Contacts](#)
- [Marital Status](#)
- [Legal Name](#)

View

- [About Me](#)
- [Addresses](#)
- [Email Addresses](#)
- [Address Changes](#)
- [Name](#)
- [Phone Numbers](#)
- [Worker Documents](#)

Changing Personal Information (cont'd)

- Emergency contacts

My Emergency Contacts

Donald Duck (013040) 



Emergency Contacts

Emergency Contact	Relationship	Contact Priority	Preferred Language	Phone Number	Email Address		
Diasy Duck	Spouse			+1 55-123-4567 (Mobile) +1 555-123-4567 (Mobile)		<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

You can add a new emergency contact

You can edit or delete an emergency contact

Changing Personal Information (cont'd)

Edit Emergency Contact

Related to Worker Donald Duck (013040)

Relationship * Spouse

Step 1: Select your relationship

Preferred Language

Contact Priority
 Alternate
 Primary
 None of the above

Step 2: Select the contact type

Name

Contact Information

Country *

Step 4: Enter the additional contact information

Prefix

First Name *

Middle Name

Last Name *

Suffix

Step 3: Enter the contact's name

OK

Cancel

Enhancing your **workday** for the road ahead



**Additional Resources and
Communication**

Training Materials Available to You

- Videos on **workday**
 - Available under “Self Service Training” on the Home page
- **workday.borgwarner.com (employee site)**
 - workday.borgwarner.com
 - Employee Quick Reference Job Aid
 - Employee Training
- **Local HR support**

Where to Go for Additional Support

- Local HR Contact:

Key Dates to Remember

- (Dates) Training for Employees
- (Dates) Training for Managers
- (Date) Go Live on Workday

Next Steps

- Check accuracy of your information in **workday**
- Update your personal information, as needed
- Watch for upcoming communications

Thank You

Remember...

**Innovation Gains the Business...
while
Quality Retains the Business!**



*feel good
about driving*

Enhancing your **workday** for the road ahead



Benefits Overview

Reviewing Your Benefit Elections

The screenshot shows the Workday portal home page. At the top, there is a search bar and the user's name, Donald Duck (013040). The main content area is titled "Home" and contains four worklets: Quicklinks, Personal Information, Benefits, and Directory. The Benefits worklet is circled in red. Below the Benefits worklet, there are three sub-sections: "Change Benefits, Beneficiaries, Dependents", "View Benefit Elections, Benefit Elections as of Date", and "Current Cost 45.00". Each sub-section has a corresponding callout box explaining its function. At the bottom of the page, there are three more worklets: Self Service Training, Custom Reports, and Reports.

Home

Quicklinks Personal Information **Benefits** Directory

To view or change your benefits, select this worklet

To change your benefits, select Benefits

Note: Beneficiaries are NOT tracked in Workday

To view or change your dependents, select Dependents

To view your benefits, select one of these options

Current cost represents your monthly benefit costs

Change Benefits Beneficiaries Dependents

View Benefit Elections Benefit Elections as of Date

Current Cost 45.00

Self Service Training Custom Reports Reports

Viewing Your Benefit Elections

- When you view your benefits, you will see your current elections

Benefit Elections

Donald Duck (013040) ⋮



Current Benefit Elections and Costs 14 Items



Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Calculated Coverage	Dependents	Beneficiaries	Employee Cost (Monthly)	Employer Contribution (Monthly)
Medical - Cigna US Basic HRA	01/01/2014	01/01/2014	Family		Daffney Duck Daisy Duck			\$900.00
Dental - Cigna DEN US Dental	01/01/2014	01/01/2014	Employee + Family		Daffney Duck Daisy Duck		\$33.00	\$61.00
Vision - Cigna VIS Vision Plan	01/01/2014	01/01/2014	Employee + Family		Daffney Duck Daisy Duck		\$12.00	
Basic Life Insurance - MetLife US (Employee)	01/01/2011	01/01/2011	1 X Salary	\$80,000.00				\$8.64
AD&D Insurance - MetLife US (Employee)	01/01/2010	01/01/2010	1 X Salary	\$80,000.00				\$2.08
Long-Term Disability - Cigna US LTD 60% Corporate (Employee)	01/01/2013	01/01/2013	60% of Salary	\$4,000.00				\$6.60
Company Retirement - T. Rowe Price US RSP CRC 4%/8%	01/01/2013	01/01/2013						
Health Risk Assessment - Cigna MEDICAL ENROLLEES ONLY - Option 1: I have taken the CIGNA HRQ online (or will take it by the necessary deadline) to receive a premium discount	01/01/2011	01/01/2011						
Tobacco Cessation Program - Cigna MEDICAL ENROLLEES ONLY - Option 1: I am Tobacco Free	01/01/2011	01/01/2011						
Short-Term Disability - Cigna US Salary Continuation Service	01/01/2013	01/01/2013						\$2.26
FMLA Leave Service - Cigna US (No Enrollment Needed)	01/01/2013	01/01/2013						\$1.80
Medical Benefits Abroad - Cigna US (No Enrollment Needed)	01/01/2013	01/01/2013						\$4.68
Business Travel Accident - Cigna US BTA (No Enrollment Needed)	01/01/2013	01/01/2013						\$2.60

Changing Your Benefits

Change Benefits

Donald Duck (013040) [...]

Employees outside the U.S. should contact their Human Resources Partner to make a change to their benefit elections.

Benefit Event Type * *select one*

Benefit Event Date * 1-BIRTH/ADOPTION/GUARDIANSHI...

Submit Elections By 1-DEATH OF DEPENDENT

Enrollment Offering Types 1-DEATH OF SPOUSE

Attachments 1-DEPENDENT ATTAINMENT OF EL...

1-DEPENDENT LOSS OF ELIGIBLE...

1-DIVORCE/LEGAL SEPARATION

1-EMPLOYEE LOSES OUTSIDE CO...

1-ENTITLEMENT TO MEDICARE

Attachment	Comment	File
No Data		

enter your comment

Submit Save for Later Cancel

Step 1: To add or change your benefits, select one of these options

Step 2: Attach supporting documentation for all requested changes

Step 3: Submit your information for approval

Cancel will remove any changes you have made and keeps the original information

If you select "Saved for Later" these changes are waiting for you to take action and Submit