

# workday Training for Managers



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 only reference for live, hands-on activities
- 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 managers:
  - Overview / Business Rationale: 5 minutes
  - Training Presentation and Demonstrations: 30 minutes
  - Hands-on exercise—15 minutes
    - Manager Navigation
  - Questions: 5 minutes
  - Wrap-up: 5 minutes

# What We Will Cover During Training

- Today, you will be shown how to:
  - Log in and navigate **workday**
  - Approve employee changes
- We'll also talk about:
  - Key dates and upcoming communication
  - Where to go for additional support and resources
  - **Appendix: Overview of Personal Information, Benefits and Reporting functionality**
- You will leave with:
  - Management Resource Guide for detailed information
  - Management Quick Reference Job Aid

# **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 for managers
- Be able to complete key transactions using **workday**
- Know where to go for support

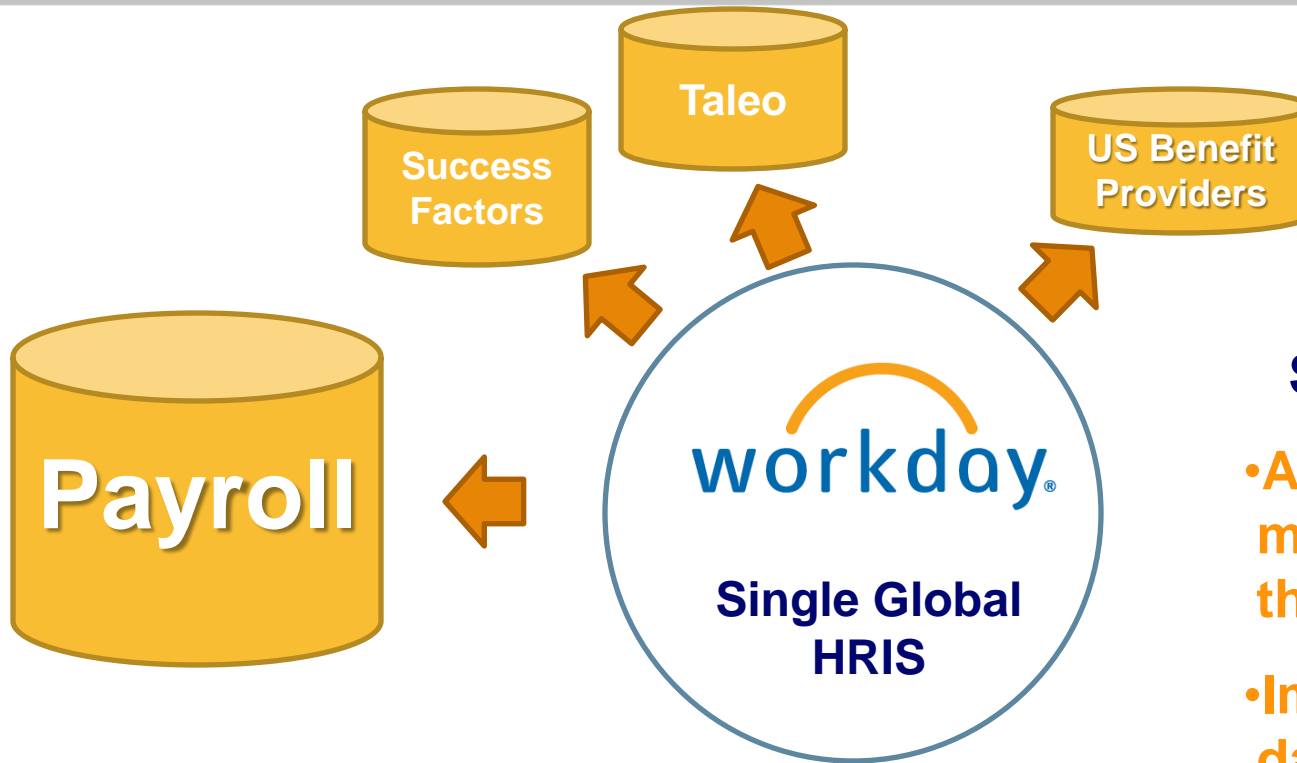
# HRIS = Human Resources Information System

- **workday** will be the single, global HRIS for:
  - Borg Warner **Master Data Record** of information for all employees
    - Contract / Temp Employees not paid by BW will be excluded
  - **Benefits Management** for BorgWarner provided benefits
  - Global **Compensation Management**
  - Employee and Manager **Self Service Functionality**

## “Enhancing Your workday for the Road Ahead”

- Helps us be a **technology leader** using leading technology
- Provides **tools to support** you in your current role
- An **easy to use portal** for accessing all your personal and benefits-related information
- **On-line automation** for employee transactions
- **Enhances accuracy** when you enter and manage your own data
- Simple and intuitive system that **saves you valuable time**
- **Mitigates legal and compliance risk** through data privacy & security
- Allows us to be **green** by minimizing paper traffic

# BorgWarner Future State-**workday** HRIS



## HR Foundation to Support the Business

- Ability to interface with multiple systems across the globe
- Improved security & data integrity
- Automation and Efficiency with transactions

## Future State Model Single HR System

# What's NOT Changing and What IS?

What's NOT Changing	What IS Changing
Employee information is secure and confidential	Employees manage their own personal information
Employees must make sure their personal information is up-to-date	Employees can make changes to their personal information from anywhere they can open a browser
You and HR will approve transactions	The approval flow of transactions
Timely completion of your role in employee transactions is key	You can approve transactions from anywhere you can open a web-browser
Employees must provide supporting documentation to HR for requested changes to their personal information	Documentation will be updated through workday

# What's the Most Significant Change?

## Managers Please Note!

- A transaction **CANNOT** happen without your **approval** in the system
  - Hiring, Pay Changes, Job Change Transactions **MUST** have a timely response
- You will receive a BorgWarner **email notification** that your “**Action is Required**”

# Key Points for Managers

## Managers Please Note!

- BorgWarner will adhere to all **Employee Information Privacy and Security** laws, policies and guidelines
- The **workday** system will host HR related employee information in a secure, on-line environment
- The **workday** system enhances the efficiency and automation of employee transactions / approvals
- Please support the advantages of **workday**

# Enhanced Information Security

## ■ **Managers Please Note!**

- Treat all employee information as if it were your own
- Lock your computer when leaving your desk
- Log out when finished with a **workday** session
- Use a secure printing location
- Do not leave employee related printed information / reports at the printer or visible on your desk

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. Three yellow callout boxes provide instructions: Step 1 points to the User Name field, Step 2 points to the Password field, and Step 3 points to the Sign In button. An optional callout points to the Change Password link.

**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 image shows a screenshot of the Workday home page interface. At the top, there is a blue navigation bar containing a search box, the Workday logo, the user name 'Mickey Mouse (012285)', and a notification icon with a '2' badge. Below the navigation bar, the word 'Home' is displayed. The main area features a grid of 12 circular icons representing different system functions. Each icon is accompanied by a callout box with a yellow background and a black border, providing instructions on how to use that feature. The icons and their corresponding callouts are: 'Quicklinks' (rocket icon), 'My Team' (team icon), 'Employee Changes' (person with arrow icon), 'Birthdays' (cake icon), 'Anniversaries' (balloons icon), 'Personal Information' (ID card icon), 'Benefits' (shield with heart icon), 'Directory' (person card icon), 'Self Service Training' (rocket icon), 'Custom Reports' (tag with lock icon), and 'Reports' (clipboard with checkmarks icon).

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

**Lost?**  
Click on the "workday" logo to get back to the Home page.

**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"

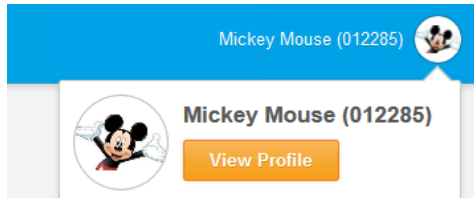
**My Team:**  
Go to "My Team" for all information for your direct reports

**Directory:**  
Go to "Directory" to view org charts, locations, workers, supervisors and more

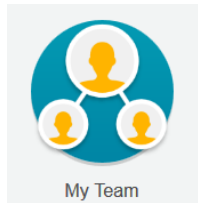
**Self Service Training:**  
Go to this worklet for training videos on Workday

**Custom Reports and Reports:**  
Go to these worklets to view all reports

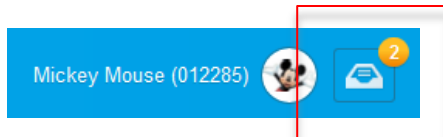
# Navigating the System *(cont'd)*



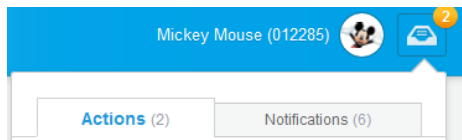
Available to all employees; provides your profile, personal information, benefits data, password, preferences and more



One-stop shop for manager self service and informational needs

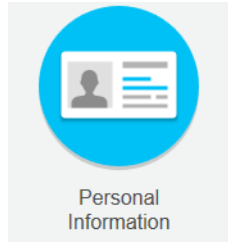


All transactions that require action – this is your Inbox



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

# Navigating the System *(cont'd)*



Where you can view and change your personal information

---



Where you can view your benefit elections and monthly costs

---



Reports



Custom Reports

Run, download and analyze reports for your team

---

Enhancing your **workday** for the road ahead



## Manager Approval Process

# Approving Employee Transactions

- HR initiates transaction
- HR manager provides first approval
- At least one-over-one approval required
  - Employee's manager
  - Manager's manager
  - For Grade 14 and below
- Transactions for higher grade positions may require additional levels of approval
  - Grade 15 and above will require Business Unit Leadership approval

# Approving Employee Transactions *(cont'd)*

- Onboarding/hiring
- Compensation adjustments
- Job changes
  - Transfer (department, location, manager, paygroup, shift, correction, etc.)
  - Promotion
  - Lateral Move
  - Demotion
  - Separation
- **REMEMBER: A transaction **CANNOT** happen without your approval**

# Approving Employee Transactions *(cont'd)*

- Three options for every approval notification
  - Approve
  - Deny **(this will cancel the entire process)**
  - Send back
- To deny or send back, you must provide comments explaining why
- **Managers...please note!**
  - **All information included in the “comments” section becomes part of an employee’s permanent record**
  - **Please keep all comments to a minimum (“need to know” data) and maintain professionalism**

# Approvals: Onboarding/Hiring

The screenshot displays the Workday Home interface. At the top, there is a blue header with a search bar, the Workday logo, and the user profile for Mickey Mouse (012285). The main content area is titled "Home" and contains a grid of navigation tiles: Quicklinks, My Team, Employee Changes, Birthdays, Anniversaries, Personal Information, Benefits, Directory, Self Service Training, Custom Reports, and Reports. An "Inbox" notification is open, showing two items: a "Hire" for Daisy Duck and a "Promotion" for Donald Duck. A red box highlights the "View Inbox" button in the notification. Two yellow callout boxes provide instructions: one points to the notification header with the text "Begin any approval process by selecting your Inbox", and another points to the "View Inbox" button with the text "Select View Inbox".

Begin any approval process by selecting your Inbox

Select View Inbox

# Approvals: Onboarding/Hiring (cont'd)

## Inbox

Actions (2)

Notifications (6)

Archive (1)

Viewing: All

(Newest on T...



### Hire: Daisy Duck - WHQ - Financial Systems (Mickey Mouse (012285))

23 hour(s) ago - Due 02/14/2014; Effective 02/10/2014



### Promotion: Donald Duck (013040)

23 hour(s) ago - Due 02/14/2014; Effective 02/10/2014

**Step 1: Look for "Hire" in your Actions**

**Step 2: Select the Hire action box and the details will open on the right for your Review and Approval**

## Review

### Hire: Daisy Duck - WHQ - Financial Systems (Mickey Mouse (012285))



For WHQ - Financial Systems (Mickey Mouse (012285))

Overall Process Hire: Daisy Duck - WHQ - Financial Systems (Mickey Mouse (012285))

Overall Status In Progress

Due Date 02/19/2014

## Details to Review

The following reflects the specific compensation data that was changed by the transaction. If you would like to see additional details about the employee's compensation click on the More Details button.

### More Details

← Applicant Daisy Duck  
Position WHQ - Financial Systems (Mickey Mouse (012285))  
Effective Date 02/10/2014  
Reason Hire Employee > New Hire  
Job Profile AA0510 - Admin Assistant I  
Time Type Full time  
Location Auburn Hills WHQ - USA - Corporate

# Approvals: Onboarding/Hiring (cont'd)

## Review

Hire: Daisy Duck - WHQ - Financial Systems (Mickey Mouse (012285))

For WHQ - Financial Systems (Mickey Mouse (012285))  
Overall Process Hire: Daisy Duck - WHQ - Financial Systems (Mickey Mouse (012285))  
Overall Status In Progress  
Due Date 02/19/2014

### Details to Review

The following reflects the specific compensation details for this hire. If you would like to see additional details about the employee's compensation click on the More Details button.

More Details

Applicant Daisy Duck  
Position WHQ - Financial Systems (Mickey Mouse (012285))  
Effective Date 02/10/2014  
Reason Hire Employee > New Hire  
Job Profile AA0510 - Admin Assistant I  
Time Type Full time  
Location Auburn Hills WHQ - USA - Corporate

**Step 1:** Review details; Click "More Details" to view more information

**Step 2:** When you select "Approve" this advances the transaction to the next step in the process.

**Step 3:** If you select "Deny" the entire process is cancelled and you must enter comments

**Step 4:** If you select "Send Back" you must enter reason comments in the Reason box

**Step 5:** If you select "Cancel" it will stay in your Inbox waiting for you to take action

enter your comment


Approve Deny Send Back Cancel

View Comments (0)  
Process History  
Related Links

# Approvals: Onboarding/Hiring (cont'd)


## Inbox

**Actions** (1)   Notifications (7)   Archive (1)

Viewing: **All**   (Newest on T...   

✓ Hire: Pluto Dog - WHQ - Financial Systems  
(Mickey Mouse (012285))  
30 second(s) ago - Due 02/20/2014; Effective 02/17/2014

**Success! Event approved**

Hire: Pluto Dog - WHQ - Financial Systems (Mickey Mouse (012285)) 

**If you approve, you receive confirmation of your approval**

# Approvals: Compensation

The screenshot shows a user interface for a compensation system. At the top, there is a search bar with the text "search" and a user profile for "Mickey Mouse (012285)". A notification icon in the top right corner shows a blue envelope with a yellow circle containing the number "2".

**Step 1:** Look for "Compensation Change" or "One-Time Payment" in your Inbox. A yellow callout box points to the notification area on the right.

**Step 2:** Select "Compensation Change". A yellow callout box points to the "Employee Changes" icon in the main dashboard.

The main dashboard, titled "Home", features several icons: "Quicklinks" (rocket), "My Team" (three people), "Employee Changes" (person with circular arrow), "Anniversaries" (balloons), "Personal Information" (ID card), "Benefits" (shield with heart), and "Directory" (person card).

The notification area on the right shows two items:

- Compensation Change: Donald Duck (013040) - Financial Systems Analyst, Sr II**  
22 hour(s) ago - Due 02/15/2014; Effective 02/16/2014
- Hire: Daisy Duck - WHQ - Financial Systems (Mickey Mouse (012285))**  
1 day(s) ago - Due 02/14/2014; Effective 02/10/2014

A "View Inbox" button is located at the bottom of the notification area.

# Approvals: Compensation (cont'd)

## Inbox

**Actions (2)** | Notifications (8) | Archive (1)

Viewing: All (Newest on T...)

**Compensation Change: Donald Duck (013040) - Financial Systems Analyst, Sr II**  
22 hour(s) ago - Due 02/15/2014; Effective 02/16/2014

**Hire: Daisy Duck - WHQ - Financial Systems (Mickey Mouse (012285))**  
1 day(s) ago - Due 02/14/2014; Effective 02/10/2014

### Review

#### Compensation Change: Donald Duck (013040) - Financial Systems Analyst, Sr II

For: Financial Systems Analyst, Sr II - Donald Duck (013040)

Overall Process: Compensation Change: Donald Duck (013040) - Financial Systems Analyst, Sr II

Overall Status: In Progress

Due Date: 02/20/2014

#### Details to Review

The following reflects the specific compensation data for the employee. If you would like to see additional details about the employee's compensation click on the More Details button.

[More Details](#)

Employee: Donald Duck (013040)

**Step 1: Review details; Click "More Details" to view more information**

**Step 2: When you select "Approve" this advances the transaction to the next step in the process.**

**Step 3: If you select "Deny" the entire process is cancelled and you must enter comments**

**Step 4: If you select "Send Back" you must enter reason comments in the Reason box**

**Step 5: If you select "Cancel" it will stay in your Inbox waiting for you to take action**

View Comments (0)  
Process History  
Related Links

**Approve** | Deny | Send Back | Cancel

# Approvals: Compensation (cont'd)

Actions (1)
Notifications (8)
Archive (2)

Viewing: All
(Newest on T...)

**Compensation Change: Donald Duck (013040) - Financial Systems Analyst, Sr II**

53 second(s) ago - Due 02/21/2014; Effective 03/01/2014

Employee: Donald Duck (013040)

Position: Financial Systems Analyst, Sr II

Effective Date: 03/01/2014

Reason: Base Salary Change - Market

Next Pay Period: 03/01/2014 - 03/15/2014 (Se

**Errors: 1**

Please add a comment to specify why you clicked: Deny

Current			
Compensation Basis	Total	% Increase	Amount Increase
Total Base Pay	80,000.00	2.50%	2,000.00
Total Salary & Allowances	80,000.00	2.50%	2,000.00

Effective Date	Plan Type	Plan Name	Current Details	Proposed Change
03/01/2014	Salary	Salary Plan	80,000.00	82,000.00

enter your comment

Approve
Deny
Send Back
Cancel

**Acceptable Comment:**  
"Increase amount is 3.00% not 2.50%."

**Unacceptable Comment:**  
"Donald Duck does not deserve this increase; he doesn't talk like a human and he sounds like a duck quacking."


If you select "Deny" or "Send Back," you must enter comments

To send back, you must enter a reason in the Reason box

# Approvals: Compensation (cont'd)

## Inbox

**Actions** (1)   Notifications (11)   Archive (3)

Viewing: All   (Newest on T...   

✓ Compensation Change: Donald Duck  
(013040) - Financial Systems Analyst, Sr II  
27 second(s) ago - Due 02/21/2014; Effective 03/01/2014

### Success! Event approved

Compensation Change: Donald Duck (013040) - Financial Systems Analyst, Sr II 

### Up Next



Prince Charming (012126)

Approval Chain by Manager  
Due Date 02/21/2014

### Details and Process

Done

If you approve, you will receive confirmation of your approval

Who is the next approver and what is the next step in this process

# Approvals: Job Changes

The screenshot shows a user interface for job change approvals. At the top, there is a search bar and a user profile for Mickey Mouse (012285). A notification dropdown is open, showing two actions: a lateral move for Donald Duck and a hire for Daisy Duck. The main content area is titled 'Home' and contains eight icons for different features: Quicklinks, My Team, Employee Changes, Birthdays, Anniversaries, Personal Information, Benefits, and Directory. Two yellow callout boxes provide instructions: 'Step 1: Look for "Transfer," "Promotion," "Lateral Move" or Demotion" in your Inbox' and 'Step 2: Select "Lateral Move"'. The 'Employee Changes' icon is highlighted by the second callout.

**Step 1:** Look for "Transfer," "Promotion," "Lateral Move" or Demotion" in your Inbox

**Step 2:** Select "Lateral Move"

**Actions (2)** Notifications (10)

**Lateral Move: Donald Duck (013040)**  
1 minute(s) ago - Due 02/16/2014; Effective 02/16/2014

**Hire: Daisy Duck - WHQ - Financial Systems (Mickey Mouse (012285))**  
1 day(s) ago - Due 02/14/2014; Effective 02/10/2014

[View Inbox](#)

Home

Quicklinks My Team Employee Changes Birthdays

Anniversaries Personal Information Benefits Directory

# Approvals: Job Changes (cont'd)

**Inbox**

Actions (2) Notifications (10) Archive (1)

Viewing: All (Newest on T...)

**Lateral Move: Donald Duck (013040)**  
4 minute(s) ago - Due 02/16/2014; Effective 02/16/2014

**Hire: Daisy Duck - WHQ - Financial Systems (Mickey Mouse (012285))**  
1 day(s) ago - Due 02/14/2014; Effective 02/10/2014

**Review**  
**Lateral Move: Donald Duck (013040)**

**Step 1: Review details and scroll to view more information**

Get Started	Current	Proposed
Team	Who will be the manager after this change?	Mickey Mouse (012285) No Change
	Which team will this person be on after this change?	WHQ - Financial Systems (Mickey Mouse (012285))

Action	Current	Proposed
Reason	Why are you making this change?	Why are you making this change? Lateral Move - Lateral
	When do you want this change to take effect?	02/16/2014

**Step 2: When you select "Approve" this advances the transaction to the next step in the process.**

enter your comment

**Approve** **Deny** **Send Back** **Cancel**

View Comments (0)  
Process History  
Related Links

**Step 3: If you select "Deny" the entire process is cancelled and you must enter comments**

**Step 4: If you select "Send Back" you must enter reason comments in the Reason box**

**Step 5: If you select "Cancel" it will stay in your Inbox waiting for you to take action**

# Approvals: Job Changes (cont'd)

**Inbox**

Actions (1) Notifications (13) Archive (4)

Viewing: All (Newest on T...)

**Lateral Move: Donald Duck (013040)**  
25 second(s) ago - Due 02/21/2014; Effective 03/01/2014

**Review**  
**Lateral Move: Donald Duck (013040)**

Get Started	Current	Proposed	
Team	Who will be the manager after this change? Which team will this person be on after this change?	Mickey Mouse (012285) WHQ - Financial Systems (Mickey Mouse (012285))	No Change
Action	Current	Proposed	
Reason	Why are you making this change?	Why are you making this change? Lateral Move - Lateral	
Effective On		When do you want this change to take effect? 03/01/2014	
Job	Current	Proposed	
Job Profile	Job Profile FF1220 - Financial Systems Analyst,Sr II	Job Profile FF1110 - Financial Analyst, Senior I	
Job Title	Financial Systems Analyst,Sr II	Financial Analyst, Senior I	

**Errors: 1**

Please add a comment to specify why you clicked: Deny

**Acceptable Comment:**  
"Donald's title is Financial Analyst Senior II, not Senior I."

**Unacceptable Comment:**  
"Donald is stupid for wanting to join Finance."

enter your comment

View Comments (0)  
Process History  
Related Links

Approve Deny Send Back Close

If you select "Deny" or "Send Back," you must enter comments

To send back, you must enter a reason in the Reason box

# Approvals: Job Changes (cont'd)

## Inbox

Actions (1)

Notifications (13)

Archive (4)



Viewing: All

(Newest on T...



Lateral Move: Donald Duck (013040)

25 second(s) ago - Due 02/21/2014; Effective 03/01/2014

**Success! Event approved**

Lateral Move: Donald Duck (013040)

If you approve, you receive confirmation of your approval

**Up Next**



Prince Charming (012126)

Approval Chain by Manager

Due Date 02/21/2014

Who is the next approver and what is the next step in this process

**Details and Process**

Done

# Approving via your handheld device



Get the **workday** mobile app today!  
**FREE!**  
Approving transactions made easy!

- Follow the links below or see your local HR representative for detailed instructions:
  - iPhone - <https://itunes.apple.com/app/workday/id316800034>
  - iPad - <https://itunes.apple.com/app/workday-for-ipad/id448724987>
  - Android - <https://play.google.com/store/apps/details?id=com.workday.workdroidapp>

Enhancing your **workday** for the road ahead



**“Hands-On” Session**  
(Navigation through My Team,  
Approvals and All About Me)

# “Hands-On” Learning

- We will “Log-In” to the system
- We will navigate through your “My Team” worklet
- We will visit your “Personal Information” worklet

# Logging in to **workday**

- Access the BorgWarner **workday** site at:

- <https://wd5.myworkday.com/borgwarner/login.flex>

“Go Live” link—Summer 2014

- <https://wd5-impl.workday.com/borgwarner5/login.flex>

Test Link—Use for Mgr. Training

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

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

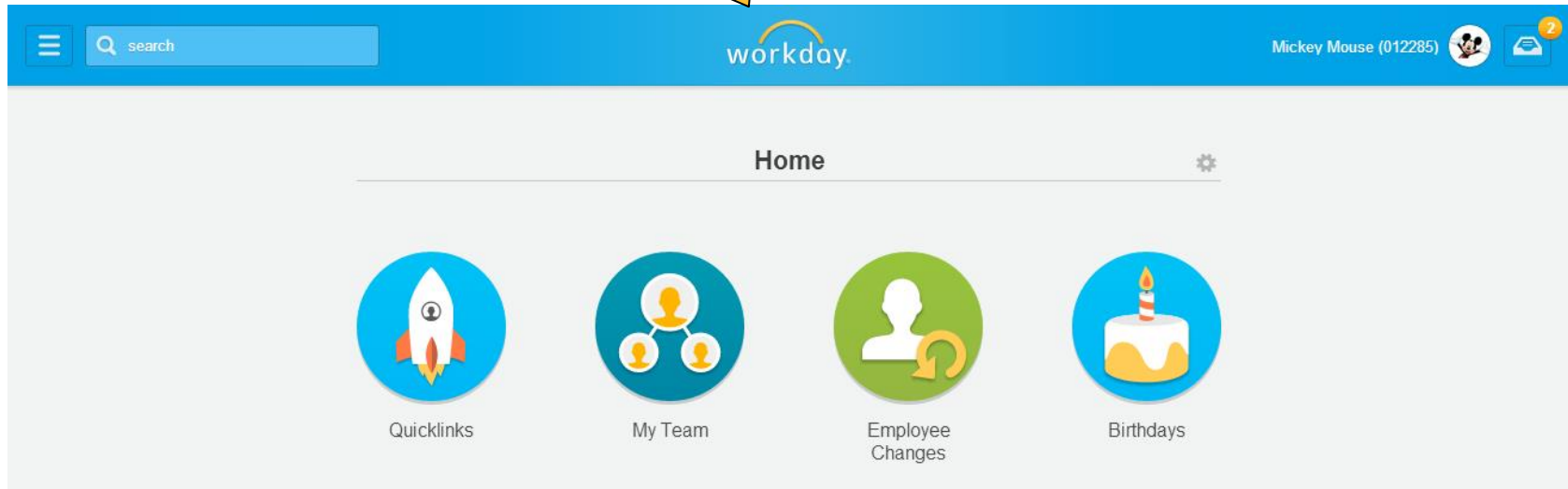
**Step 3:** Click Sign In

**Optional:** To change your password after first login, select “change password”

# Home Page

What do I do if I get “lost” in the system?

**Lost?**  
Click on the “workday” logo to get back to the Home page.



# Navigating the System

The image shows a screenshot of the Workday system home page. The top navigation bar is blue and contains a search box, the Workday logo, the user name 'Mickey Mouse (012285)', and a notification icon with a '2' badge. Below the navigation bar, the word 'Home' is displayed. The main area features a grid of 12 circular icons representing different system functions. Red circles highlight several of these icons: the search box, the Workday logo, the 'My Team' icon, the 'Birthdays' icon, the 'My Team' icon, the 'Anniversaries' icon, the 'Self Service Training' icon, the 'Custom Reports' icon, and the 'Reports' icon. Yellow callout boxes provide instructions for each highlighted element.

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

**Lost?**  
Click on the "workday" logo to get back to the Home page.

**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"

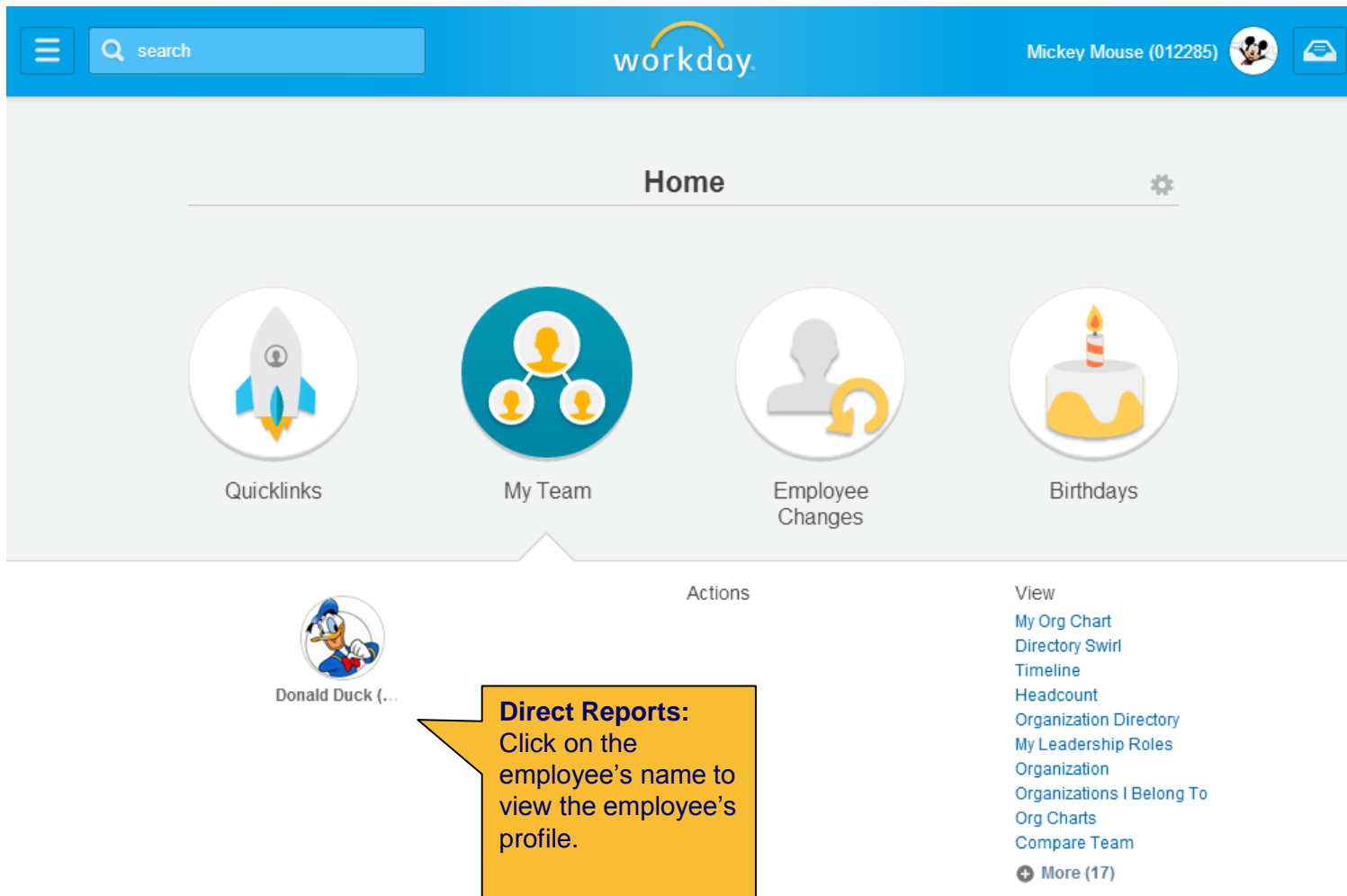
**My Team:**  
Go to "My Team" for all information for your direct reports

**Directory:**  
Go to "Directory" to view org charts, locations, workers, supervisors and more

**Self Service Training:**  
Go to this worklet for training videos on Workday

**Custom Reports and Reports:**  
Go to these worklets to view all reports

# My Team



workday

Mickey Mouse (012285)

## Home

Quicklinks

My Team

Employee Changes

Birthdays

Actions





Donald Duck (...)


**Direct Reports:**  
Click on the employee's name to view the employee's profile.

View



- My Org Chart
- Directory Swirl
- Timeline
- Headcount
- Organization Directory
- My Leadership Roles
- Organization
- Organizations I Belong To
- Org Charts
- Compare Team
- More (17)





# My Team cont'd

Mickey Mouse (012285) 



## Donald Duck (013040)

Financial Systems Analyst, Sr II  

 [donaldduck@borgwarner.com](mailto:donaldduck@borgwarner.com)  View Team  Manager  
Mickey Mouse (012285)  Auburn Hills WHQ - USA - Corporate


**Job** Compensation Contact

Job Details Job History Organizations Management Chain Manager History Worker History

### Job Details

Employee ID	013040
Organization	<a href="#">BorgWarner (James R Verrier (010096)) &gt;&gt; WHQ - Financial Systems (Mickey Mouse (012285))</a>
Job	<a href="#">Financial Systems Analyst, Sr II</a>
Business Title	Financial Systems Analyst, Sr II
Job Profile	<a href="#">FF1220 - Financial Systems Analyst, Sr II</a>
Employee Type	Regular
Management Level	<a href="#">13 Individual Contributor</a>
Time Type	Full time
FTE	100.00%
Location	<a href="#">Auburn Hills WHQ - USA - Corporate</a>

### Contact Information - Public

Email  [donaldduck@borgwarner.com](mailto:donaldduck@borgwarner.com)

### Work Address

3850 Hamlin Road  
Auburn Hills, MI 48326  
United States of America

# My Team

workday. Mickey Mouse (012285)

Home

Quicklinks My Team Employee Changes Birthdays

Actions

Donald Duck (...)

View

- My Org Chart
- Directory Swirl
- Timeline
- Headcount
- Organization Directory
- My Leadership Roles
- Organization
- Organizations I Belong To
- Org Charts
- Compare Team
- More (17)

**View:**  
Any word in blue font is a link. When you click on any of these items shown under the "View" column, you will be able to view reports, charts, and additional information and resources.

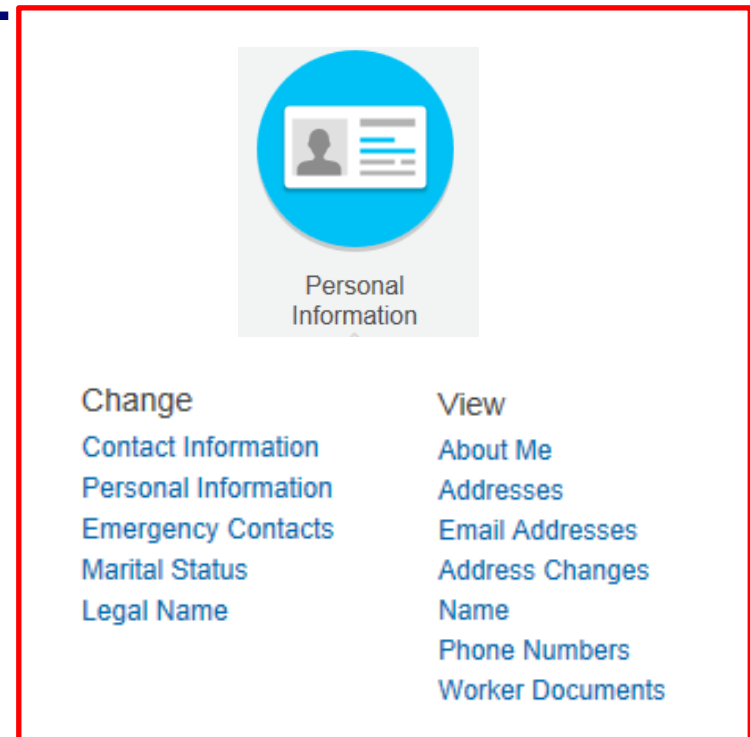
# Personal Information

The screenshot shows the Workday Home dashboard. At the top, there is a blue header bar containing a search bar with the text "search", the Workday logo, and the user name "Mickey Mouse (012285)" next to a profile picture and a notification icon. Below the header, the word "Home" is centered, followed by a settings gear icon. The main area displays a grid of 12 circular icons, each with a label underneath. The "Personal Information" icon, which depicts a person's profile card, is circled in red. The other icons include: Quicklinks (rocket), My Team (three people), Employee Changes (person with circular arrow), Birthdays (cake), Anniversaries (balloons), Benefits (shield with heart), Directory (person card), Self Service Training (rocket), Custom Reports (reports with lock), and Reports (clipboard with checklist).

Icon	Label
Rocket	Quicklinks
Three people	My Team
Person with circular arrow	Employee Changes
Cake	Birthdays
Balloons	Anniversaries
Person card (circled in red)	Personal Information
Shield with heart	Benefits
Person card	Directory
Rocket	Self Service Training
Reports with lock	Custom Reports
Clipboard with checklist	Reports

# 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



Enhancing your **workday** for the road ahead



**Additional Resources**

# Training Materials Available To You

- Videos on **workday**
  - Available on the “Home” page by selecting the “Self Service Training” icon
- Job aids
  - [workday.borgwarner.com](http://workday.borgwarner.com)
  - Manager Resource Guide & FAQ’s
  - Manager Training
  - Manager Quick Reference Job Aid
- Local HR support

# Where to Go for Additional Support

- Local HR: **[add]**

# Key Dates To Remember

- June xx-xx: Manager Training Sessions
- June xx-xx: Employee Training Sessions
- Summer 2014: **workday** is live!
- Summer 2014: Continue Employee Communication

# Next Steps

- Don't leave without your Manager Resource Guide / FAQ's / and Quick Reference Job Aid
- After the “Go Live” date access **workday** and familiarize yourself with the setup
- Monitor your **workday** Inbox and watch your BorgWarner Outlook E-mail for notifications of transactions that need your approval
- Watch for upcoming communications – and help keep your team informed

# Thank You

*feel good  
about driving*



*better fuel economy  
reduced emissions  
great performance*

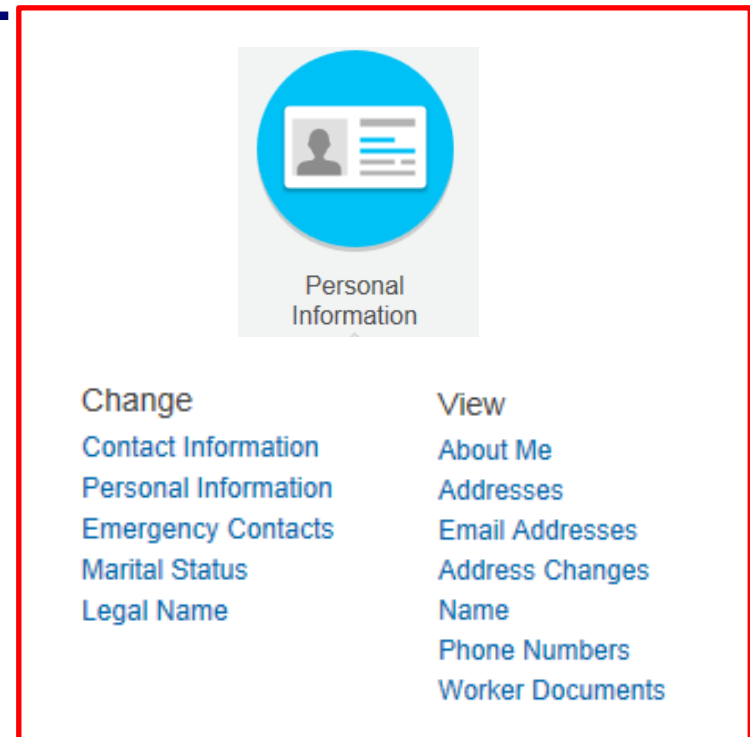
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**Personal Information**

# 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
<a href="mailto:mickeymouse@borgwarner.com">mickeymouse@borgwarner.com</a>	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

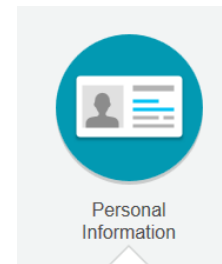
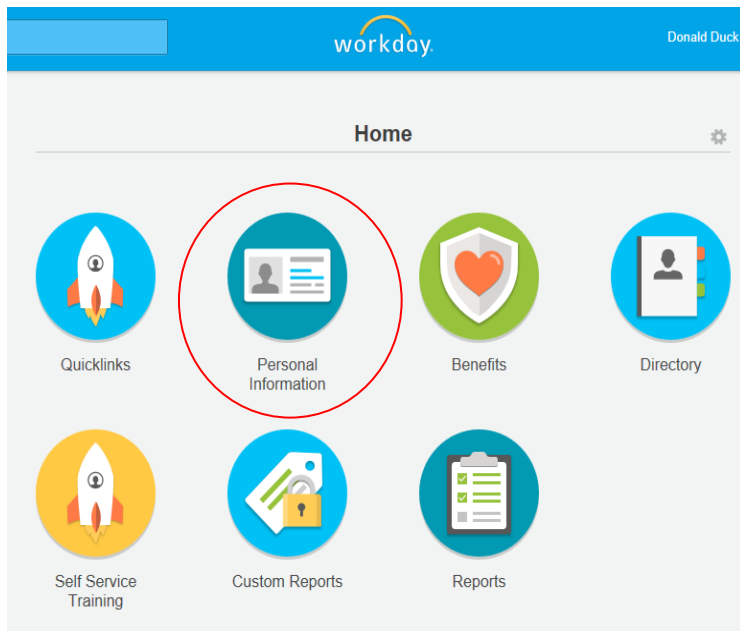
Submit

Save for Later

Cancel

# 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 \*

Prefix

First Name \*

Middle Name

Last Name \*

Suffix

**Step 4: Enter the additional contact information**

OK

Cancel

**Step 3: Enter the contact's name**

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## 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 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**

**To view or change your dependents, select Dependents**

**To view your benefits, select one of these options**

**Current cost represents your monthly benefit costs**

**Note: Beneficiaries are NOT tracked in Workday**

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** Actions

**Current Benefit Elections and Costs** - 12 Items

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Calculated Coverage	Dependents	Beneficiaries	Employee Cost (Monthly)	Employer Contribution (Monthly)
Medical - Cigna US BuyUp HRA	02/18/2013	02/18/2013	Employee Only				\$45.00	\$330.00
Dental - Cigna DEN US Dental	02/18/2013	02/18/2013	Employee Only				\$12.00	\$33.00
Healthcare FSA - Cigna (1) US Auto-Forward	02/18/2013	02/18/2013	\$1,000.00 Annual				\$95.24	
Basic Life Insurance - MetLife US (Employee)	02/18/2013	02/18/2013	1 X Salary	\$49,000.00				\$5.29
Long-Term Disability - Cigna US LTD 60% Livonia (Employee)	02/18/2013	02/18/2013	60% of Salary	\$2,425.00				
Long-Term Disability Buy Up - Cigna US LTD 70% (Employee)	02/19/2013	02/19/2013	70% of Salary	\$2,829.17			\$0.01	
FMLA Leave Service - Cigna US	02/18/2013	02/18/2013					1	\$1.80
Short-Term Disability - Cigna US Salary Continuation Service	02/18/2013	02/18/2013						\$2.26
Medical Benefits Abroad - Cigna US	02/18/2013	02/18/2013						\$4.68
Health Risk Assessment - Cigna (1) US - I have taken the Cigna HRQ online (premium discount applied)	02/18/2013	02/18/2013						
Business Travel Accident - Cigna US	02/18/2013	02/18/2013						\$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

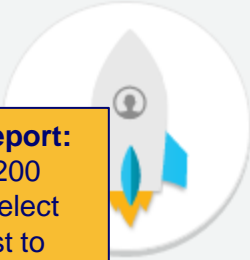
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## Reporting Overview

# Reporting Tools

**Option 1 – Run Report:**  
Choose from over 200 available reports; select the report of interest to run it



Self-Service Training



Custom Reports



Reports

Select Reports or Custom Reports on the Home Page

- View
- About Me
- Active Employees
- Active Employees - Basic
- Active Employees - Basic By Location
- Active Employees - Detail
- Active Employees - Detail By Location
- Actual Increase less than Statutory Minimum %
- Addresses
- All Contingent Workers
- All Employee Time Off
- + More (272)

- Tools
- Schedule a Report
- Process Monitor
- Background Processes for a Process
- View All My Reports

**Option 2: Schedule a Report** to occur at a regular interval

**Option 3: View All My Reports** you have scheduled to occur at a regular interval

# Reporting Tools (cont'd)

The screenshot shows the Workday interface for a 'Birthday List' report. The top navigation bar includes a search box, the Workday logo, and the user profile 'Mickey Mouse (012285)'. The report title is 'Birthday List' with a menu icon. Below the title, there are filters: 'Include Subordinate Organizations: No' and 'Include Managers: Yes'. The report data is displayed in a table with 2 items. Two callout boxes provide instructions: 'Option 4: Download a report by selecting the Excel icon' points to the Excel icon in the top right, and 'Option 5: Print to PDF by selecting the printer icon' points to the printer icon in the top right.

**Option 4:** Download a report by selecting the Excel icon

**Option 5:** Print to PDF by selecting the printer icon

Next Birthday	Name	Department Name	Supervisory Organization	Address	Hire Date	Job Title	Work Shift
09/03/2014	Mouse, Mickey	&RS-004050 WHQ Controller	WHQ - Financial Reporting & Accounting Shared Serv (Craig Aaron (012126))	231 Main Street	04/30/2007	Manager, Finance S	
11/09/2014	Duck, Donald	&RS-004050 WHQ Controller	WHQ - Financial Systems (Mickey Mouse (012285))		02/01/2008	Financial System II	