WORKDAY USER GUIDE FOR PRE-HIRES

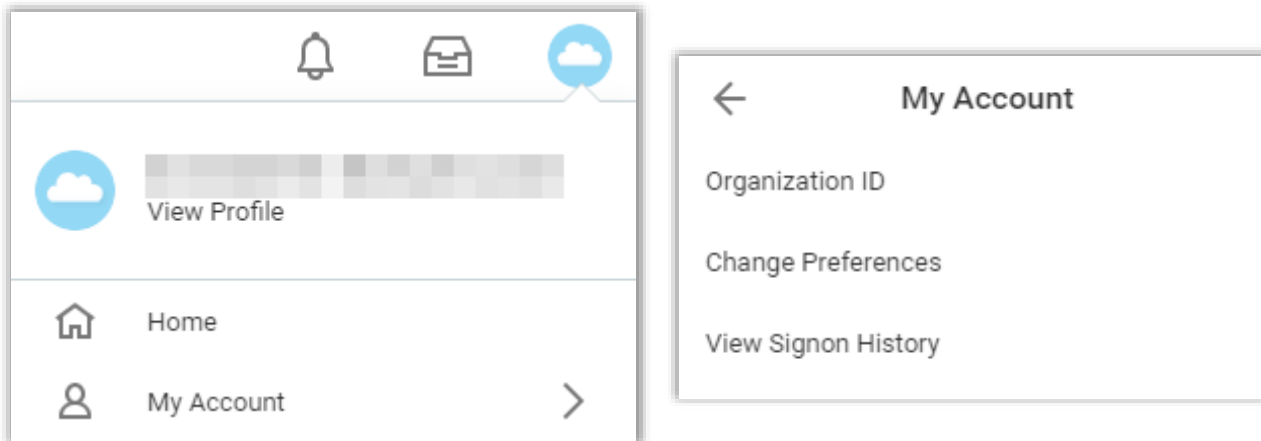# CONTENTS

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INNIO JENBACHER Waukesha

1.0 CHANGE YOUR ACCOUNT SETTINGS

You can easily change your account settings in Workday. Click the **Profile** menu in the top-right corner of your Home page, then select **My Account**. From here, you can access your organization ID and manage your account preferences.

Click the **Profile** menu in the top-right corner of your Home page, then select **My Account** and then **Change Preferences**. From here You can edit your individual Workday preferences for the displayed language, locale and timezone etc.
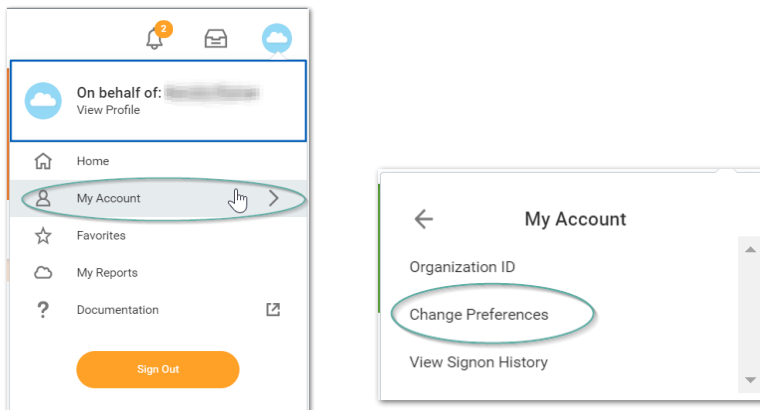
From the **Change Preferences** page:

    a.   Change Locale settings by selecting the **Preferred Locale** field and selecting the relevant locale. (locale settings include date, clock format etc.)

    b.   Change Language settings by selecting the **Preferred Display Language** field and selecting the relevant language

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Global Preferences

Default Locale	English (United States) - en_US
Preferred Locale	select one ▼
Default Display Language	English
Preferred Display Language	select one ▼
Default Timezone	GMT-06:00 GMT-06:00
Default Hour Clock (from Locale)	12 hour
Preferred Hour Clock	select one ▼
Default Currency	USD
Preferred Currency	☰

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YOU MUST LOG OUT AND THEN BACK INTO WORKDAY FOR YOUR PREFERENCES TO BE UPDATED IN THE SYSTEM.

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2.0 NAVIGATE THE HOME PAGE

Use these instructions to navigate and accomplish tasks within Workday. The Workday Home page displays applications that provide access to tasks and reports. See the Announcement Onboarding for messages to you.

/ 1   By clicking on the **INNIO logo** in the left-hand top corner you can always navigate back to the l**anding page**.

/ 2   To **return** on the previous page, click the **back arrow in your browser**.

/ 3   When submitting a task or request, always **scroll down to the bottom of the page** to find the **Submit** or **Done** button.
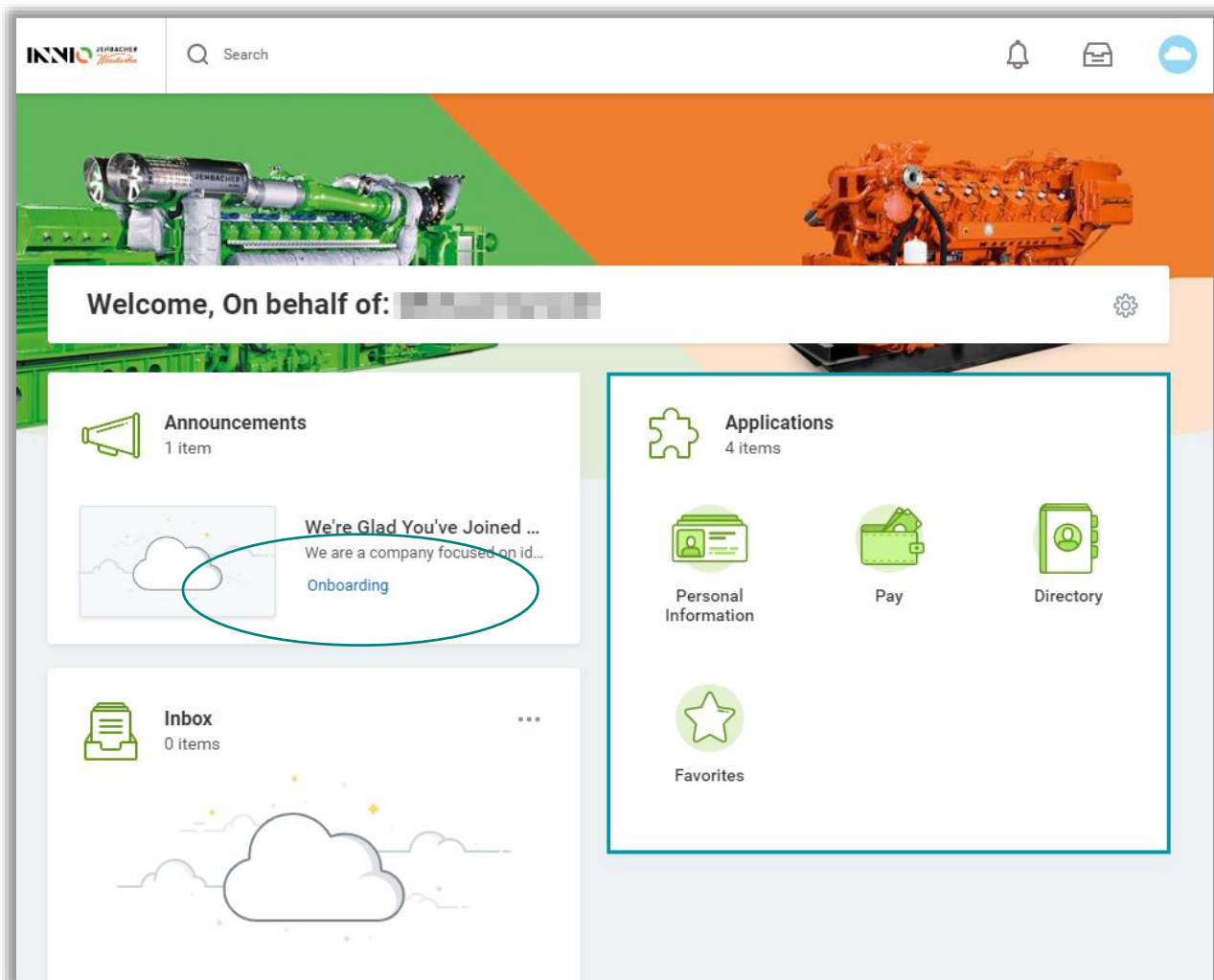
3.0 USING INBOX ON YOUR DESKTOP

/ 1   Click the **Inbox** icon in the upper right corner of Workday, near your **Profile** icon.

A number of Onboarding tasks will appear in your Workday inbox. Once you have clicked on your inbox your onboarding tasks will appear on the left-hand side. Click on each of the tasks and follow the remaining instructions in this booklet to assist you in completing them.

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4.0 ERROR AND ALERT MESSAGES

Error and alert messages display in red. They typically identify a specific field or fields where information is missing, entered incorrectly, or in conflict with rules that INNIO has established. Click the message to view the error details.

Errors prevent you from completing a task until that error is fixed.

Errors

1. **Street Name**
   The field Street Name is required and must have a value.

2. **City**
   The field City is required and must have a value.

Alerts notify you of potential problems on a page, but do not prevent you from completing the task. Alerts also display the location of missing or problematic information within the task, report, or business process.

Alert

1. **Grid Alert (Row 1)**
   This worklet may not display properly in Mobile applications.

5.0 SUBMIT A CHANGE TO PERSONAL INFORMATION

Use these instructions to enter your personal information such as your Legal Name, Contact Information, and Emergency Contact Information, etc. This data is needed to get us ready for your successful start with INNIO.

Navigate to your **Inbox** to find your Onboarding tasks:

5.1 ENTER CONTACT INFORMATION

Enter or verify your contact information. Any information you see on this screen was taken from your application in Jobvite.

From your **Inbox**:

/ 1   Click **Add**   Add   in the **Primary Address** field set to insert the following information:

    a.   **Country**

    b.   **Street Name**

    c.   **House Number**

    d.   **Other Address (PO Box, etc.)**

    e.   **Postal Code**

    f.   **City**

    g.   **Land**

    h.   **Usage**

    i.   **Visibility**

/ 2   Click **Add**   Add   in the **Primary Phone** field set to insert the following information:

    a.   **Phone Device**

    b.   **Country Phone Code**

    c.   **Phone Number**

    d.   **Phone Extension**

    e.   **Visibility**

/ 4   Click **Add**   Add   in the **Primary Email** field to insert a personal **Email Address** and **Visibility**.

Primary Email

Add

/ 5   Additional **Address**, **Phone**, and **Email** information may be added to your profile by clicking **Add**.   Add

/ 6   Use the drag and drop functionality to add the file in the **Attachments** box or click **Select Files** to choose a file from your computer.

Proposed
Attachments

Drop file here
or
Select files

"VISIBILITY – PRIVATE" ENSURES THAT PERSONAL DATA IS NOT VISIBLE TO ALL INNIO EMPLOYEES.

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/ 7   Click **Submit**.

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5.2 CHANGE EMERGENCY CONTACTS

Please indicate a person who we can contact in case of an emergency. This information is only visible to members of the HR team and a dedicated safety delegate.

From your **Inbox**:

/ 1 Click the **Legal Name** field set to change the following information:

   a. **Country**
   b. **Prefix**
   c. **Given Name(s)**
   d. **Middle Name**
   e. **Family Name**

/ 2 Click the **Relationship** field set to update your relationship to your emergency contact.

/ 3 Click the **Primary Phone** field set to change the following information:

   a. **Phone Device**
   b. **Country Phone Code**
   c. **Phone Number**
   d. **Phone Extension**
   e. **Type**

/ 4 Click **Submit**.

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5.3 ENTER PERSONAL INFORMATION (GENDER, DATE OF BIRTH, CITIZENSHIP, COUNTRY OF BIRTH, CITY OF BIRTH, ETHNICITY, MARITAL STATUS, RELIGION)

From your **Inbox**:

/ 1   Click each field to make appropriate changes to your **Gender**, **Date of Birth**, **Place of Birth**, **Marital Status** (if applicable), **Race/Ethnicity** (if applicable) and **Citizenship Status**. Not all of these fields might be applicable to you. They are country specific, depending on your location of work.
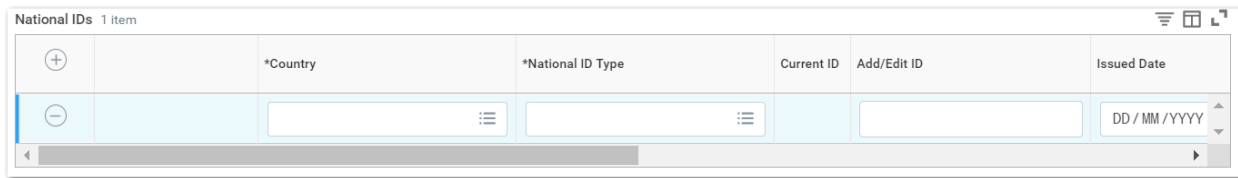

Citizenship Status

Citizenship Status   ✎

/ 2   Use the drag and drop functionality to add any relevant documentation in the **Attachments** box or click **Select Files** to choose a file from your computer.

/ 3   Click the **Prompt** ☰ icon in the **Category** field and select **Personal Information**.

/ 4   Click **Submit**.

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5.4 EDIT GOVERNMENT IDs (E.G. SOCIAL SECURITY NUMBER)

Please add the National ID - e.g. social security number, tax number – as indicated for your country. This data will be forwarded to process payroll.

From your **Inbox**:

/ 1 Click the **Add Row** ⊕ icon to create insert a **National ID** line.

/ 2 Enter information into the following fields:

    a. **Country**: Enter the country of the passport.

    b. **National ID Type**: Select the type of National ID.

    c. **Add/Edit ID**: Enter the National ID number.

    d. **Issued Date**: Enter the date the passport was issued, if on the ID card.

    e. **Expiration Date**: Enter the expiration date of the passport, if on the ID card.

/ 3 Click **Submit**.

5.5 MANAGE PAYMENT ELECTIONS

Your payment election data will be forwarded to process payroll.

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THIS IS NOT APPLICABLE TO US/CANADIAN EMPLOYEES.

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PAYMENT ELECTION FIELDS MAY VARY BASED ON YOUR COUNTRY. MANDATORY FIELDS ARE MARKED WITH A ASTERISK AND/OR PRODUCE AN ERROR MESSAGE IN CASE LEFT BLANK.

From your **Inbox**:

/ 1 Complete the following information about the bank account you are adding:

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THE ONLY BANK ACCOUNT OPTION AVAILABLE IS DIRECT DEPOSIT.

   a. **Account Nickname (optional)**: Enter a name for the account.

   b. **Bank Code (optional)**: Enter the bank routing number.

   c. **Bank Name**: Enter the name of the bank.

   d. **Bank Identification Code**: Enter the bank's SWIFT/BIC code.

   e. **Account Type**: Select **Checking** or **Savings**.

   f. **Account Number (optional)**: Enter your bank account number, if applicable.

   g. **IBAN (optional)**: Enter your account's IBAN number, if applicable.

   h. **Name on Account**: Enter the name of the account holder.

/ 2 Click **OK**.

/ 3 The account that you created now appears in the **Accounts** grid. The accounts you enter may be edited or removed.

Accounts 3 items					
Account Nickname	Country	Bank Name	Account Type	Account Number	
Main	Austria	PNC	Checking	******8901	Edit / Remove

/ 4 Click **OK**.

/ 5 Click **Submit**.

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5.6 UPDATE VETERAN STATUS IDENTIFICATION (CANADA/US)

/ 1   Click and select your **Veteran Status Identification**.

/ 2   Click **Submit**.

5.7 CHANGE SELF-IDENTIFICATION OF DISABILITY (CANADA/US)

/ 1   Hover your mouse over **Personal Data** and select **Change Self-Identification of Disability**.
/ 2   Click and select your **Disability Status**.

/ 3   Click **Submit**.

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6.0 ONBOARDING COMPLETE

Once you have completed all of your onboarding tasks your Workday inbox will appear empty. The tasks are now with the relevant HR/People Leaders for review.

Inbox

Actions (0)   Archive

Viewing: **All**   Sort By: **Newest**

You have no actions at this time.
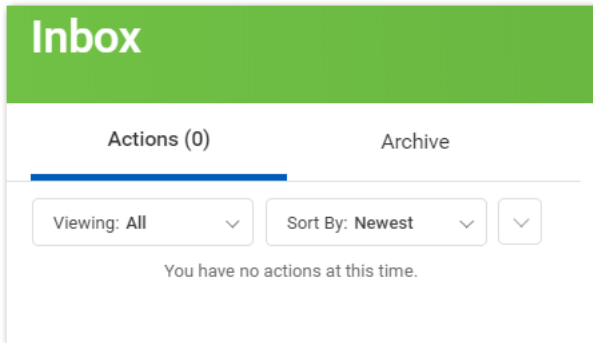
IN CASE OF ANY QUESTIONS PLEASE REACH OUT TO YOUR HR CONTACT PERSON.