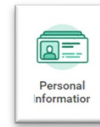


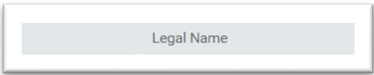
How Do I Change My Legal/Preferred Name?


Changing Legal Name

1. From the Workday homescreen, click the **Personal Information** application.









application.

2. Click the **Legal Name**  tab .

3. All fields with a red asterisk(*) are required. Fields can be typed directly into or fields with a prompt  will contain a list to choose from.

- Enter the **Effective Date*** by typing directly into the field or selecting the date from the calendar icon.
- Edits can be made to the following fields:

Country*
Prefix*
First Name*
Middle Name
Last Name*
Suffix

Effective Date * 10/25/2021 
Country *  United States of America 
Prefix 
First Name * Christopher
Middle Name
Last Name * Robins 
Suffix 

4. Enter your comments and attach all relevant document/s.

NOTE: it is a legal requirement to attach certified documentation for a legal name change.

enter your comment



Attachments

Drop files here
or
Select files

DOC

Change Legal Name_draft.docx
✓ Successfully Uploaded!

Description

Category *
search 
 Other Documents

5. Click **Submit** when complete.

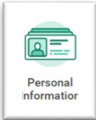
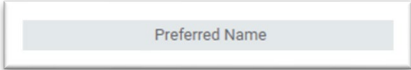
Submit

Save for Later

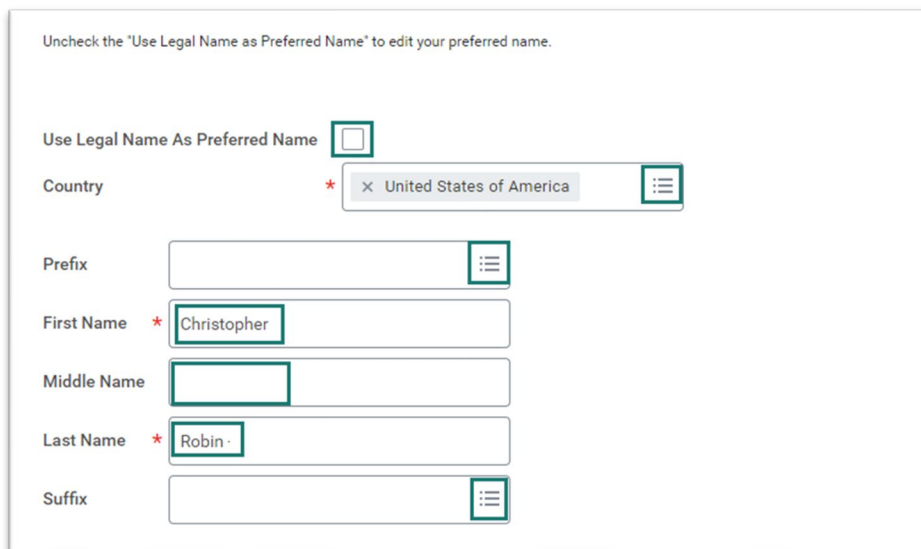
Cancel

Changing Preferred Name

Your preferred name is used in Workday for your staff profile and how you are represented in organization charts.

1. From the Workday homescreen, click the **Personal Information**  application.
2. Click the **Preferred Name**  tab.
3. Complete the mandatory fields*.

NOTE: you can select Use Legal Name as Preferred Name option if going from a preferred name back to your legal name.



Uncheck the "Use Legal Name as Preferred Name" to edit your preferred name.

Use Legal Name As Preferred Name ☐

Country * x United States of America

Prefix

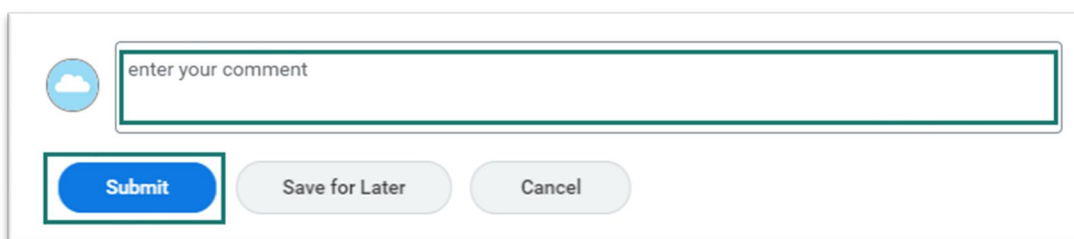
First Name * Christopher


Middle Name

Last Name * Robin

Suffix

4. Enter your validating comments and click **Submit**.



 enter your comment

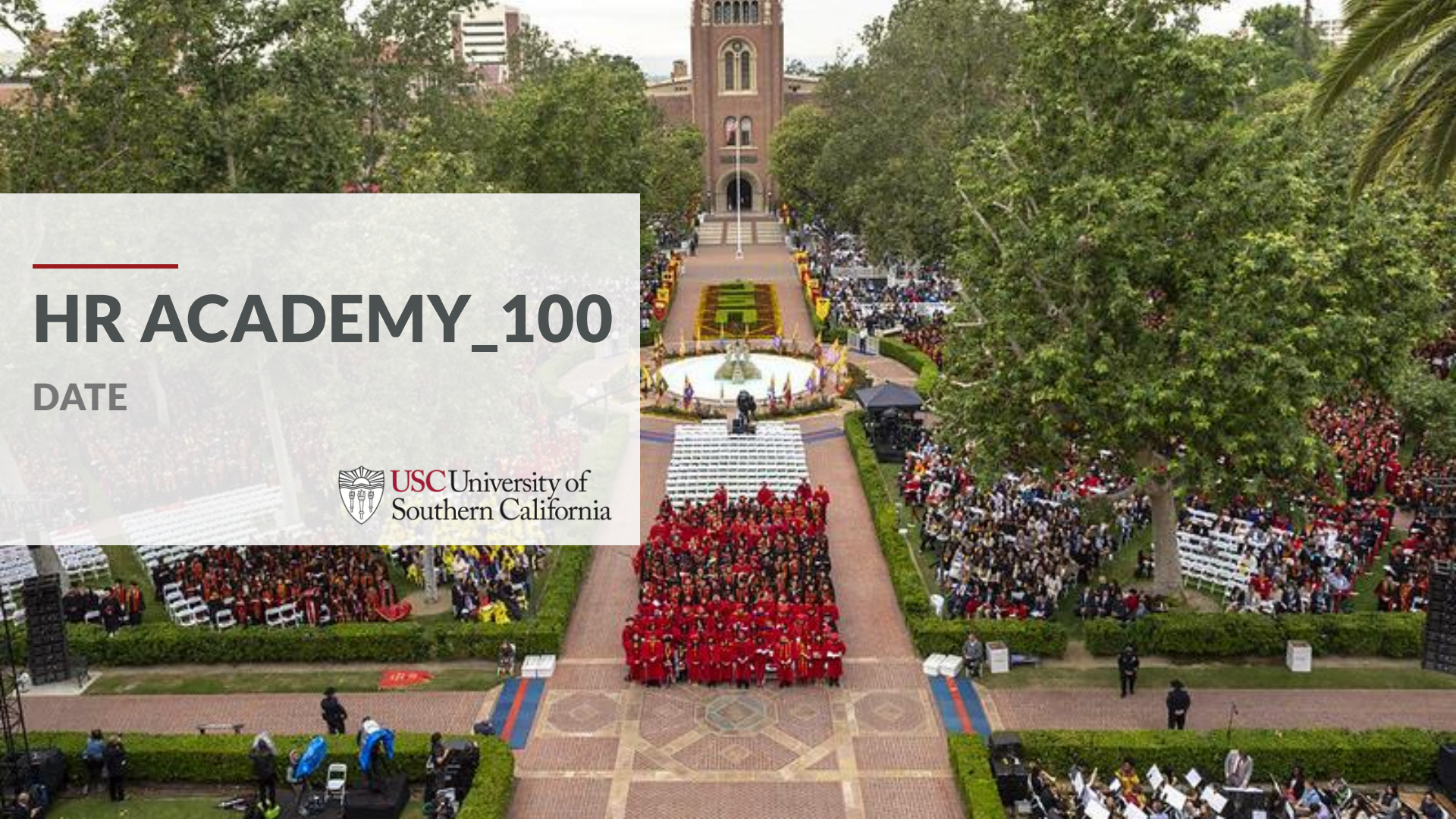
Submit Save for Later Cancel

HR ACADEMY_100

DATE



USC University of
Southern California



PRESENTATION AGENDA

01

Logistics

02

Pre-course Questions

03

Courses

04

Post-course Questions

05

Where to go for Help



WELCOME TO HR ACADEMY

WE ARE EXCITED YOU'RE HERE! LET'S GET STARTED

HRA LOGISTICS

Courses



DATA-INFORMED
DECISION-MAKING



CLIENT
EXCELLENCE



MANAGING
WORKSTREAMS



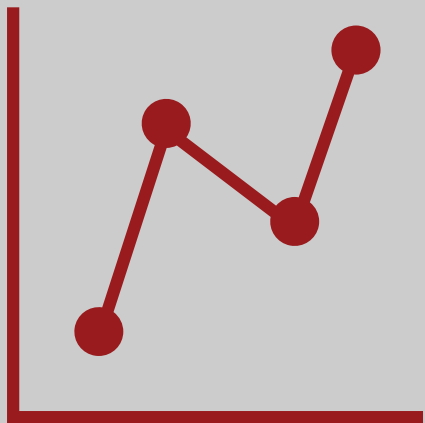
PEOPLE-CENTRIC
SOLUTIONS



Insert HR Academy link here as well as have the web address for participants

DATA INFORMED DECISION MAKING

"Without data, you're just another person with an opinion." - W. Edwards Deming



WHAT IS DATA INFORMED DECISION MAKING?

Data-driven decision making is defined as using facts, metrics, and data to guide strategic business decisions that align with goals, objectives, and initiatives.



HOW DOES DATA INFORMED DECISION MAKING APPLY TO HR AT LARGE?

Add information here. TBD



WHY DATA INFORMED DECISION MAKING IS IMPORTANT IN THE NEW HR.

Add Information TBD

DATA INFORMED DECISION MAKING

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Add information here. TBD



WHY DATA INFORMED DECISION MAKING IS IMPORTANT IN THE NEW HR.

Add Information TBD

CLIENT EXCELLENCE

"One of the deep secrets of life is that all that is really worth doing is what we do for others." -Lewis Carroll, Writer and Mathematician



WHAT IS CLIENT EXCELLENCE?

TBD



HOW DOES CLIENT EXCELLENCE APPLY TO HR AT LARGE?

Add information here. TBD



WHY CLIENT EXCELLENCE IS IMPORTANT IN THE NEW HR.

Add Information TBD

CLIENT EXCELLENCE

“One of the deep secrets of life is that all that is really worth doing is what we do for others.” -Lewis Carroll, Writer and Mathematician



WHAT IS CLIENT EXCELLENCE?

TBD



HOW DOES CLIENT EXCELLENCE APPLY TO HR AT LARGE?

Add information here. TBD

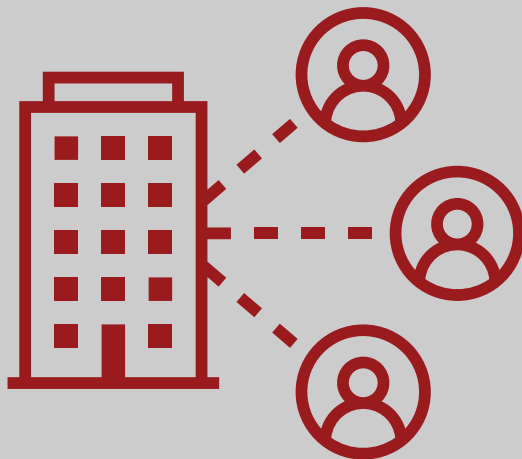


WHY CLIENT EXCELLENCE IS IMPORTANT IN THE NEW HR.

Add Information TBD

MANAGING WORKSTREAMS

“You don’t have to see the whole staircase. Just take the first step.” – Martin Luther King Jr.



WHAT IS MANAGING WORKSTREAMS?

TBD



HOW MANAGING WORKSTREAMS APPLY TO HR AT LARGE?

Add information here. TBD



WHY MANAGING WORKSTREAMS IS IMPORTANT IN THE NEW HR.

Add Information TBD

MANAGING WORKSTREAMS

“You don’t have to see the whole staircase. Just take the first step.” – Martin Luther King Jr.



WHAT IS MANAGING WORKSTREAMS?

TBD



HOW MANAGING WORKSTREAMS APPLY TO HR AT LARGE?

Add information here. TBD



WHY MANAGING WORKSTREAMS IS IMPORTANT IN THE NEW HR.

Add Information TBD

PEOPLE-CENTRIC SOLUTIONS

"Every solution created should be in service of people." - Forbes



WHAT IS PEOPLE-CENTRIC SOLUTIONS?

TBD



HOW DOES PEOPLE CENTRIC SOLUTIONS APPLY TO HR AT LARGE?

Add information here. TBD



WHY PEOPLE-CENTRIC SOLUTIONS IS IMPORTANT IN THE NEW HR.

Add Information TBD

PEOPLE-CENTRIC SOLUTIONS

"Every solution created should be in service of people." - Forbes



WHAT IS PEOPLE-CENTRIC SOLUTIONS?

TBD



HOW DOES PEOPLE CENTRIC SOLUTIONS APPLY TO HR AT LARGE?

Add information here. TBD



WHY PEOPLE-CENTRIC SOLUTIONS IS IMPORTANT IN THE NEW HR.

Add Information TBD

PRE-COURSE QUESTIONS

1 What can you tell me about this course?

2 What experience do you have with this topic?

3 What do you hope to get out of this course?

4 Which skills do you hope to improve by taking this course?



POST-COURSE QUESTIONS



1

How do you think this topic applies to you?

2

How will you use this info?

3

What are you looking forward to about exploring this topic further?

4

Is it relevant to you?

5

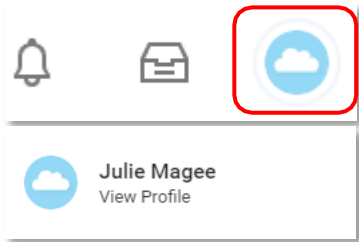
Do you feel anything was missing? What?

THANK YOU & FIGHT ON!

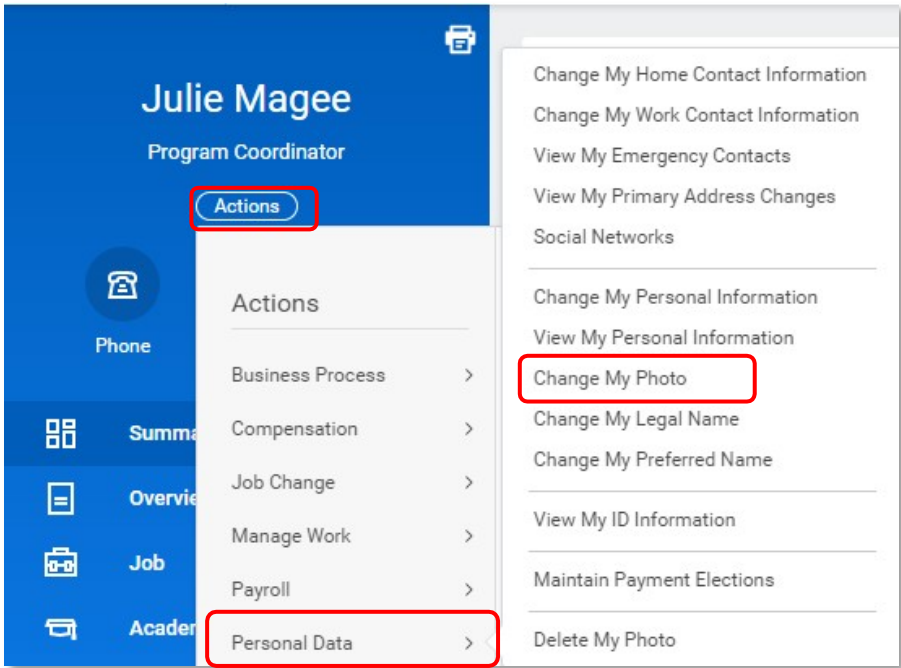


All staff and affiliates in Workday are required to have a portrait profile picture within Workday. You can update your profile picture at any time.

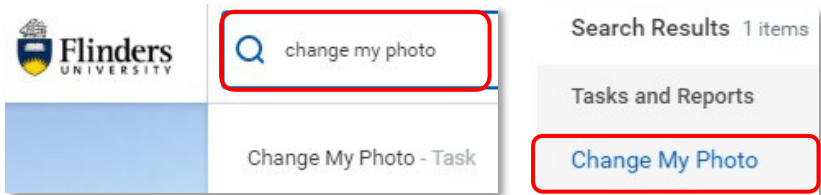
To change your profile picture, click the *profile icon* and *View Profile*.



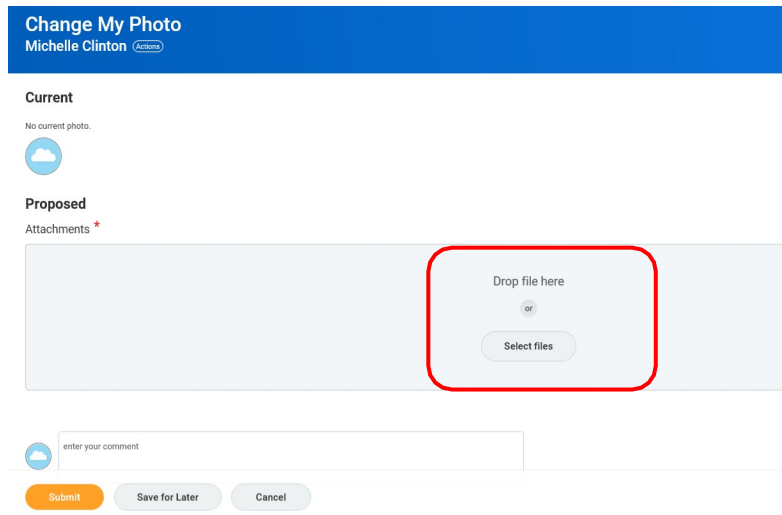
Select *Actions*, *Personal Data*, *Change my Photo*



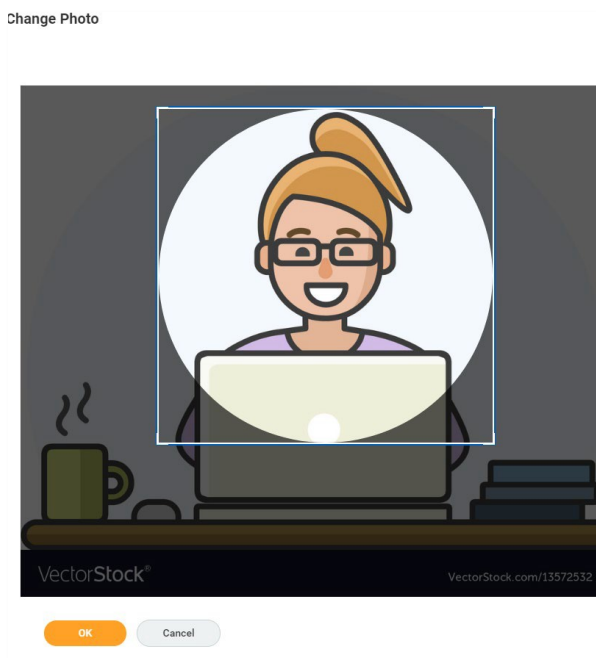
Alternatively, you can type “Change my photo” in the search bar and enter.



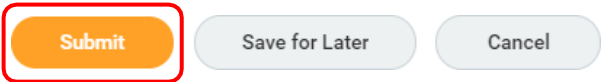
Drag your new profile picture from your data source and drop into the attachments area. Alternatively click Select file and choose your image.



A circle will appear, move the circle to the desired position to centre your picture. Click **OK**.



When you are happy with your new profile picture, click *submit*.



You can go back at any time to change your picture
An action will be sent to your supervisor for their approval.
Once approved, you will receive a notification in your Workday inbox and
your new profile picture will be in your image icon.

View Event

Photo Change: Julie Magee Actions

11 minute(s) ago - Successfully Completed

For

Julie Magee

Overall Process

Photo Change: Julie Magee

Overall Status

Successfully Completed

Due Date

05/02/2020

Calendars In Use


Consecutive Days (No Calendars Selected)

Details


Process

Current

No current photo.



Proposed





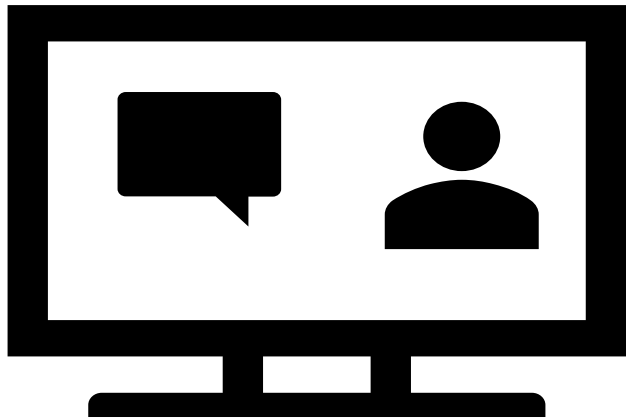


HRACADEMY

STORY TELLING WITH DATA



TECH CHECK





A little about me...

- **Trainer for 10 years.**
- **USC for 6 years.**
- **Passionate about education.**
- **Love to travel.**

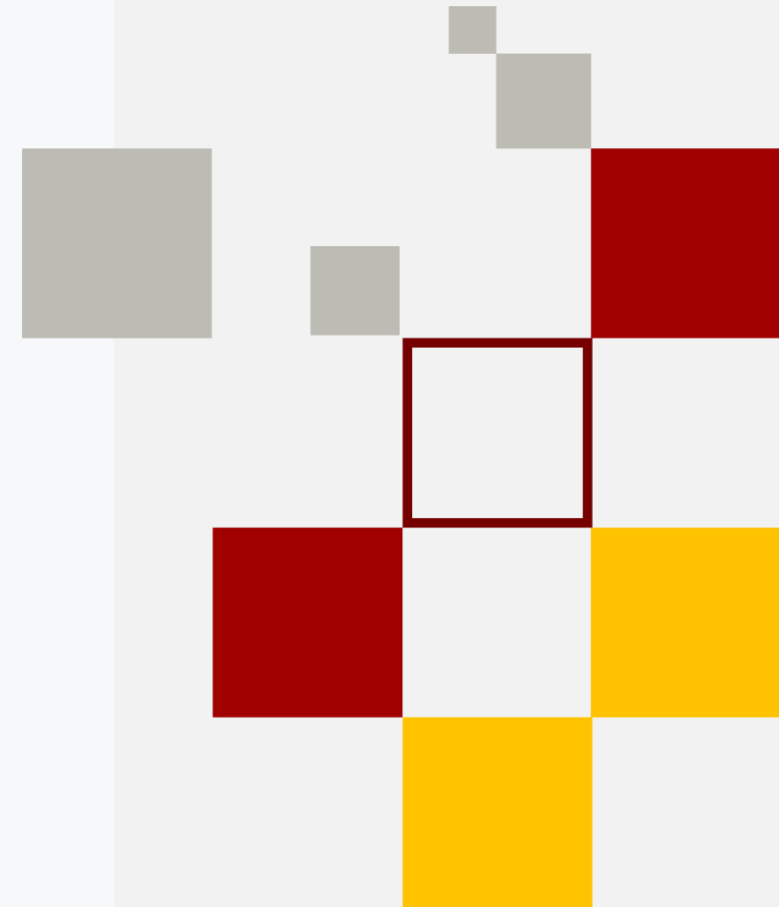
TODAY'S LAB

- Utilize the “5 Step Storytelling with Data” framework to craft a story about Polly’s Pineapple Company’s employee retention issue. You will:
 - Work as a group to come up with a “big idea”
 - Map it out using mural
 - Put it all together into a story to communicate to the group



STORY TELLING WITH DATA

HRACADEMY





**How have you
influenced
stakeholders in
the past?**



STORYTELLING WITH DATA PROCESS



STEP ONE

Uncover a Story Worth Telling



STEP ONE

UNCOVER A STORY WORTH TELLING



STEP ONE

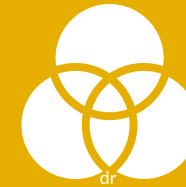
UNCOVER A STORY WORTH TELLING



**Look for
Correlations**



**Identify
Trends**



**Draw
Comparisons**

STEP TWO

Be Aware of Your Audience



STEP TWO

BE AWARE OF YOUR AUDIENCE

01

Who is my audience?

02

Is this story relevant to my audience? Does it solve a problem they care about or provide needed insight?

03

Have they heard this story before?

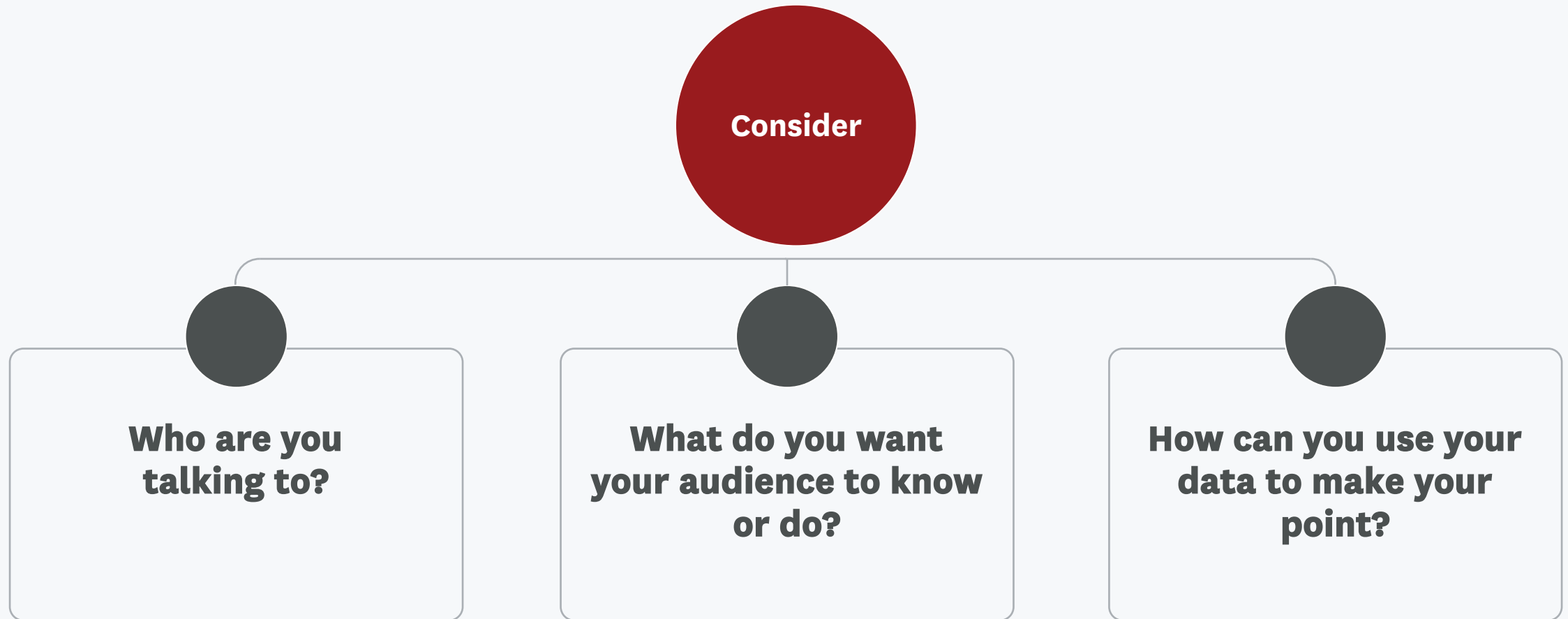
STEP THREE

Build Your Narrative



STEP THREE

BE AWARE OF YOUR AUDIENCE



STEP THREE

BE AWARE OF YOUR AUDIENCE

Context



What is the situation? Why are you telling the story?
Look for a hook to engage.

Characters



Who are the key players?

Problem



What is the conflict?

Solution



How can the problem be solved? Or what key insights or actionable steps should we take?

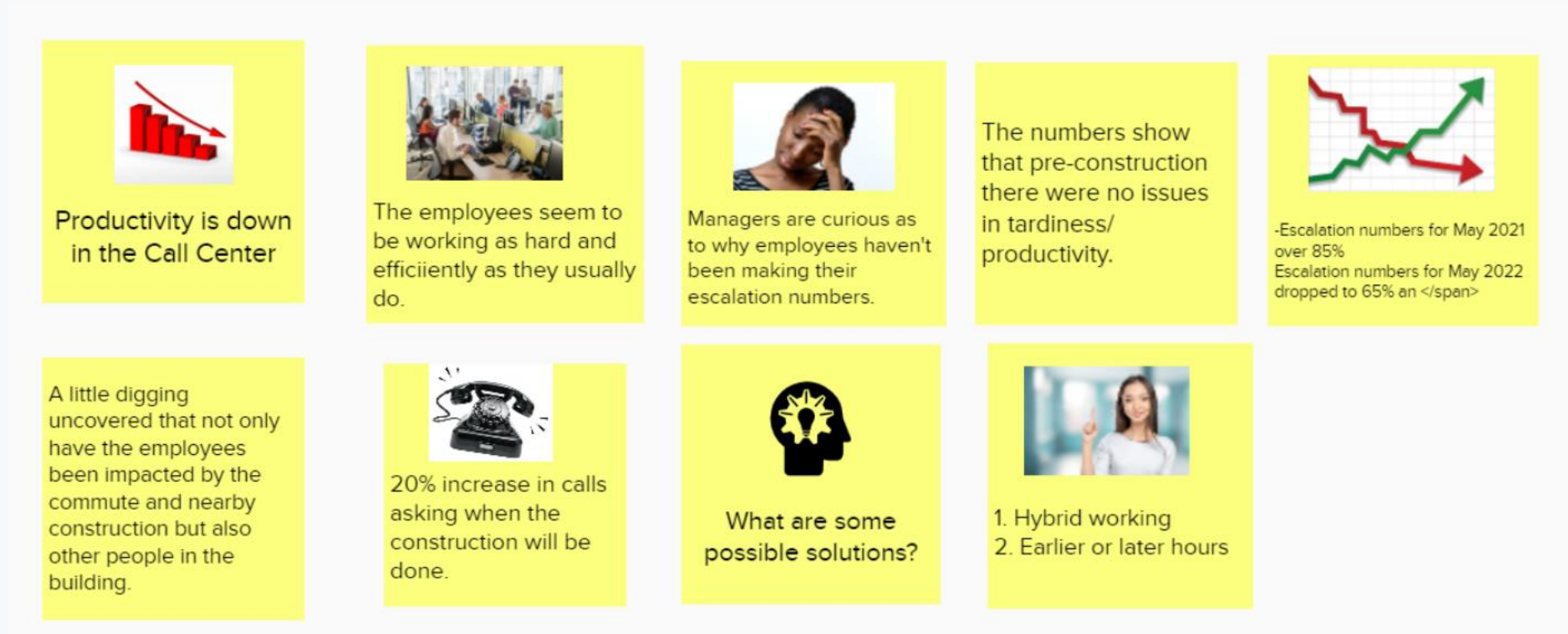
CREATE YOUR COMPELLING STORY



Directions:

1. You will be split up into groups of 3 or 4 and you will work with a data set and a scatter plot of the data that represents the reason that employees are leaving Polly's Pineapples.
2. There are two sets of numbers-HR Business Partner Input and Exit Surveys. Your task is to take this data and create a "story" about what the data shows to tell your fictitious stakeholders.
3. You will fill out a "Big Ideas" worksheet to regarding your stakeholders.
4. Write a few sentences explaining the data on your "Big Ideas" worksheet.
5. Talk through how you would do so out loud, making assumptions as necessary for the purpose of this exercise.

STORYBOARD HOW TO:



1. Create your frames (sticky notes in Mural).
2. Under each frame, write what's happening that corresponds to that scene. Use visuals and emotions to explain the narrative.
3. Refer back to step 3 above and set your context, define your characters, focus on the problem to solve and then the solution. All in a linear sequence in each of the rectangles.

DEBRIEF QUESTIONS

1

How much more compelling was the story when you used a graph, chart, or other data representation? When you used storytelling?



Additional Resources:

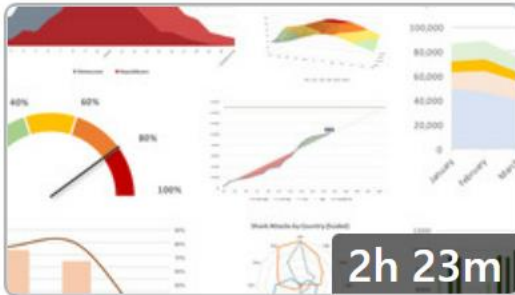


56m

COURSE

Excel: Introduction to Charts and Graphs

[Excel: Introduction to Charts and Graphs](#)



2h 23m

COURSE

Excel Data Visualization: Mastering 20+ Charts and Graphs

[Excel Data Visualization: Mastering Charts and Graphs](#)

THANK YOU & FIGHT ON!



USC University of
Southern California



Old and New CSR Panel Documentation

Searching for a Customer

Old: In the old environment, searching for a customer could be done by searching the following fields: **Last Name, First Name, Company Name, City, State, Zip, Email** or by combining any of these fields. You could also do a separate search by **DAX Account Number**.

The screenshot shows the old CSR Panel search interface. At the top, there's a navigation bar with links like SHOP, PEETNIKS®, STORES, GROCERY, LEARN, MY ACCOUNT, and WHO WE ARE. Below this is a search bar with a "SEARCH" button and a "GO" button. The main search area is titled "Search Results" and contains a "Search Criteria" section with various input fields: "Web Order Number", "Last Name", "First Name", "Company Name", "City", "State" (a dropdown menu), "Zip", "Email", and "DAX Account Number". There are "SEARCH CUSTOMERS" and "SEARCH ORDERS" buttons. At the bottom, there's a "Merge Customer Records" and "Link Order To Customer" section. The footer includes the Peetniks logo, a promotional message about shipping, and contact information.



New: In the new system searching for a customer can be done in the [Customers] [Manage Customers] screen. Similarly, you can search by any of the following fields: **Name (first, last, company) Email, Zip, State and DAX Account Number**. Entries are not case-sensitive, and you can combine any of the fields for more selective filtering. You can also do a "Global Search" for a customer or order containing a customer's name by typing their name in the global search box.

The screenshot shows the new "Manage Customers" screen. At the top, there's a "Manage Customers" header with an "Add New Customer" button. Below this is a search bar with a "Global Search" field. The main area is a table with columns: ID, Name, Email, Group, DAX Account Number, Telephone, ZIP, Country, State/Province, and Customer Since. There are filters for each column, including a "From:" and "To:" date range filter. The table shows a list of customers, with the first one having ID 274522, Name Ulises, and Email ulises.arias@alshart.com. The footer includes a "Page 1 of 18727 pages" and a "View 20 per page" option.

Viewing Customer Orders

Old: In the old environment, after the customer has been located within the Admin panel, clicking **My Orders** on the left-hand side of the screen will brought up the order history. Clicking on the **Order ID** allowed you to view the screen with the order details.



New: In the new environment, once the customer is located, any orders can be viewed by clicking **Orders** on the left-hand side. Double clicking on the row with **Order #** (similar to the **Order ID**) will open a screen with the order details. An alternative method for order lookup, is locating the order under [Sales][Orders].

Customer Information

- Customer View
- Store Credit
- Peet's Cards
- Account Information
- Addresses
- Orders**
- Billing Agreements
- Recurring Profiles (beta)
- RMA
- Shopping Cart
- Wishlist

Crosby Braverman
[Back](#) [Reset](#) [Create Order](#) [Delete Customer](#) [Manage Shopping Cart](#) [Save Customer](#) [Save and Continue Edit](#)

Page 1 of 1 pages | View 20 per page | Total 3 records found [Reset Filter](#) [Search](#)

Order #	Purchase On	Bill to Name	Shipped to Name	Order Total	Bought From	
	From: <input type="text"/> To: <input type="text"/>	<input type="text"/>	<input type="text"/>	From: <input type="text"/> To: <input type="text"/>	<input type="text"/>	
200000173	Jan 6, 2013 10:00:48 PM	Crosby Braverman	Crosby Braverman	\$36.90	Peets Peets Peets	Reorder
200000172	Jan 6, 2013 9:56:35 PM	Crosby Braverman	Crosby Braverman	\$89.90	Peets Peets Peets	Reorder
200000171	Jan 6, 2013 9:38:26 PM	Crosby Braverman	Crosby Braverman	\$103.90	Peets Peets Peets	Reorder

Editing Customer Payment Methods Information

Old: In the old environment, after the customer has been located within the Admin panel, clicking **Payment Methods** on the left-hand side allowed you to add a new credit card and edit an existing credit card.

The screenshot shows the old Peet's Coffee & Tea website interface. The top navigation bar includes links for SHOP, PEETNIKS, STORES, GROCERY, LEARN, MY ACCOUNT, and WHO WE ARE. The MY ACCOUNT section is expanded, showing options like Account Overview, My Orders, Shipping Address, and Payment Methods (highlighted with an orange box). The Payment Methods section allows users to add a new credit card or edit existing ones. It includes fields for Credit Card Number, Type of Credit Card, Name on Credit Card, and Expiration Date. There are also buttons for ADD NEW CARD, SAVE CHANGES, and REMOVE.

New: In the new environment, editing credit card payment information in the CSR Panel can be done in a similar way in the customer information form by clicking **Credit Cards** on the left-hand side. This will allow you to add a new credit card and edit and existing credit card.

Customer Information

- Customer View
- Store Credit
- Peet's Cards
- Credit Cards**
- Account Information
- Addresses
- Orders
- Billing Agreements
- Recurring Profiles (beta)

The screenshot shows the new CSR Panel interface for a customer named Katniss Everdeen. The top navigation bar includes links for Back, Reset, Log in customer, Create Order, Delete Customer, Manage Shopping Cart, and Save Customer. The Customer Credit Cards section is expanded, showing a table of credit cards. The table has columns for Card Last 4 digits, Card type, Owner, Exp month, Exp year, Default, Created, Last Updated, and Actions. There are buttons for Add Card, Edit Card, and Delete Card.

Card Last 4 digits	Card type	Owner	Exp month	Exp year	Default	Created	Last Updated	Actions
5454	MC	Katniss Everdeen	6	2016	No			Edit Card Delete Card
1111	VI	Katniss Everdeen	1	2018	No			Edit Card Delete Card

Adding Items to an RD Order

Old: In the old environment in the Recurring Delivery Edit Shipment screen, by clicking on **Add Items** you would be taken to the area of the website to go shopping to add items to the recurring delivery.

The screenshot shows the Peet's Coffee & Tea website interface. At the top, there's a navigation bar with links like SHOP, PEETNIKS®, STORES, GROCERY, LEARN, MY ACCOUNT, and WHO WE ARE. A banner below the navigation bar says "Get FREE shipping when you spend \$40". The main content area is titled "Recurring Delivery Edit Shipment" and includes a sub-header "Make changes to this particular shipment below." Below this, there's a section for "SHIPMENT #97 PRODUCT INFORMATION:" with a table listing items. The first item is "House Blend" with a quantity of 2 and a unit price of \$12.5/lb., totaling \$25.00. A red box highlights the "ADD ITEMS" button next to the item. Other buttons like "REMOVE" and "UPDATE DISCOUNT" are also visible.

Item Description	Options	Qty.	Unit Price	Total
House Blend	Whole Bean	2	\$12.5/lb.	\$25.00

New: In the environment, you will login to the CSR Admin Panel, locate the customer and “Login As Customer” (spoofing). Under their My Subscriptions section, locate the subscription to add an item to and similar to how you did in the old environment click **Add Items to Subscription** and go shopping for the items to be added to the subscription (recurring delivery).

The screenshot shows the CSR Admin Panel interface. It displays a list of subscriptions with columns for Description, Grind, Qty., Price, and Total. The first subscription is "French Roast Espresso" with a quantity of 4, priced at \$14.50, totaling \$58.00. The second subscription is "Aged Sumatra Commercial Brewer" with a quantity of 1, priced at \$16.95, totaling \$16.95. A red box highlights the "Add Items to Subscription" button. Other buttons like "Remove Item" and "Update Payment" are also visible.

Description	Grind	Qty.	Price	Total
French Roast	Espresso	4	\$14.50	\$58.00
Aged Sumatra	Commercial Brewer	1	\$16.95	\$16.95

Updating Shipment Frequency for a Recurring Delivery (Subscription)

Old: In the old environment, in the Recurring Delivery Master Order screen you made frequency choices by using the drop-down menu under the **Future Shipments Frequency & Schedule**.

CS# Bernie Arias - (690) (S) Change CS# Prod
Customer Search 1/2 lb. EGC Search
Welcome back, Frank. Sign Out / My Account
CHECK OUT! There are 0 items in your Cart
SEARCH Keyword or Item > GO

SHOP PEETNIKS® STORES GROCERY LEARN MY ACCOUNT WHO WE ARE

Get FREE shipping when you spend \$40 > Promo Code

MY ACCOUNT
> Account Overview
> My Orders
> Shipping Address
> Billing Address
> Payment Methods
> Email / Password

PEET'S CARD
> My Peet's Card
> Register a Card
> Reload My Card
> Manage Auto-Reload
> View Transactions
> Peet's Card FAQ

Recurring Delivery Master Order
Changes to this page will affect ALL future shipments of this recurring delivery order.

> VIEW CHANGE HISTORY > VIEW CSR NOTE > HELP

ORDER #W2888244

SHIPPING ADDRESS:
FRANK CLARK View All/Edit
7065 N Monon Ave
Chicago, IL 60646-1209

FUTURE SHIPMENTS FREQUENCY & SCHEDULE:
Your recurring order will be shipped every 14 days > UPDATE FREQUENCY
Shipment #97 - 12/28/2012
2 of HOU - House Blend(Whole Bean)

MASTER ORDER SHIPPING DETAILS:
Shipment Method Ground - Cont. U.S.(2-6 business days)
Click here to see the shipping rate table

*Note - selecting a shipper will always override the shipping method choice.

Shipper: >

Next Shipment Date 12/28/2012 (mm/dd/yyyy)

Order End Date: 1/1/2099 (mm/dd/yyyy)

Shipping label message: PLEASE DELIVER AT SIDE DOOR! Edit

☐ On-Hold *



New: In the new environment once logged in as the customer under their My Subscription screen, select **Update the Shipping Date and Frequency**. And similarly in this screen you are able to make changes to the shipping frequency field.

Update the Shipping Date and Frequency for this subscription

Select the next day you would like your next shipment to be sent to you and the frequency of the following shipments below.

Shipping Date
Next Shipment is on 01/30/2013

Shipping Frequency
Ship this order every 14

Cancel Update Shipping Date and Frequency

Changing Next Shipment Date

Old: In the old environment you made changes to the next shipping date in the Recurring Delivery Master Order screen by clicking on the calendar next to **Next Shipment Date**.

CSR:Bernie Arias - (690) (6) Change CSR Prod
Customer Search: 1/2 lb. EGC Search
Welcome back, Frank. SIGN OUT / MY ACCOUNT
CHECK OUT: There are 0 items in your Cart
SEARCH keyword or item# GO

SHOP PEETNIKS® STORES GROCERY LEARN MY ACCOUNT WHO WE ARE

Get FREE shipping when you spend \$40 > Promo Code

MY ACCOUNT
Account Overview
My Orders
Shipping Address
Billing Address
Payment Methods
Email / Password

PEET'S CARD
My Peet's Card
Register a Card
Reload My Card
Manage Auto-Reload
View Transactions
Peet's Card FAQ

Recurring Delivery Master Order
Changes to this page will affect ALL future shipments of this recurring delivery order.

> VIEW CHANGE HISTORY > VIEW CSR NOTE > HELP

ORDER #W2888244

SHIPPING ADDRESS:
FRANK CLARK View All/Edit
7065 N Monon Ave
Chicago, IL 60646-1209

FUTURE SHIPMENTS FREQUENCY & SCHEDULE:
Your recurring order will be shipped every 14 days > UPDATE FREQUENCY
Shipment #97 - 12/28/2012
2 of HOU - House Blend(Whole Bean)

MASTER ORDER SHIPPING DETAILS:
Shipment Method Ground - Cont. U.S.(2-5 business days)
Click here to see the shipping rate table
*Note - selecting a shipper will always override the shipping method choice.
Shipper:
Next Shipment Date 12/28/2012 (mm/dd/yyyy)
Order End Date: 1/1/2099 (mm/dd/yyyy)
Shipping label message: PLEASE DELIVER AT SIDE DOOR! Edit
☐ On-Hold *



New: In the new environment once logged in as the customer under their My Subscription screen, select **Update the Shipping Date and Frequency**. And similarly in this screen you are able to make a change in the **Next Shipment is on** field.

Update the Shipping Date and Frequency for this subscription

Select the next day you would like your next shipment to be sent to you and the frequency of the following shipments below.

Shipping Date
Next Shipment is on 01/30/2013

Shipping Frequency
Ship this order every February 2013

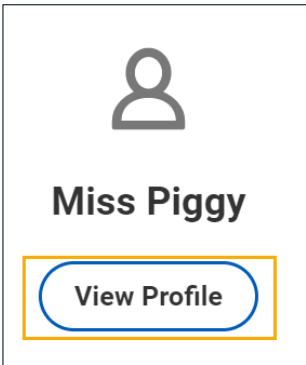
Cancel Update

Talent: Hiring a Temporary Worker

This job aid outlines the steps required to hire a brand new/external temporary worker.



From the Workday's home page, select **Your Profile Photo >View Profile**.



Note: Fields with a red *asterisk ** are mandatory.

1

- Select Team.

Miss Piggy

Practice Manager

Actions

Email

Team

2

- Under **Org Chart**, select the unfilled position.

Pearly Whites Family Dental...

Miss Piggy

Practice Manager

Pearly Whites Family Dent...

Fozzie Bear

Dental Assistant

Pearly Whites Family Dent...

John Snow

Treatment Coordinator

Pearly Whites Family Dent...

Miss Piggy

Practice Manager

Pearly Whites Family Dent...

Kermit The Frog


Dental Hygienist

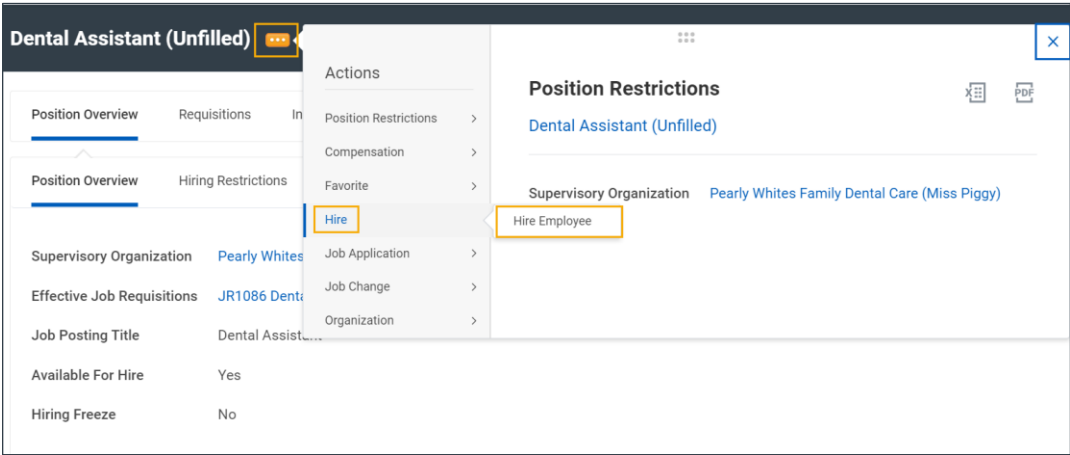
Pearly Whites Family Dent...

Dental Assistant (Unfilled)

3

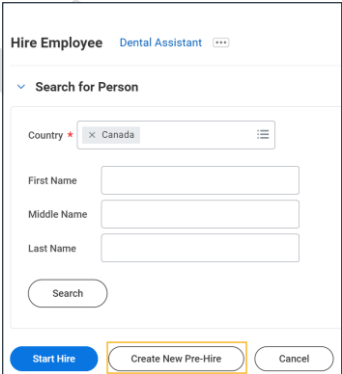
Talent: Hiring a Temporary Worker

- Click the related actions button  and select **Hire** from the primary menu and **Hire Employee** from the secondary menu.





4

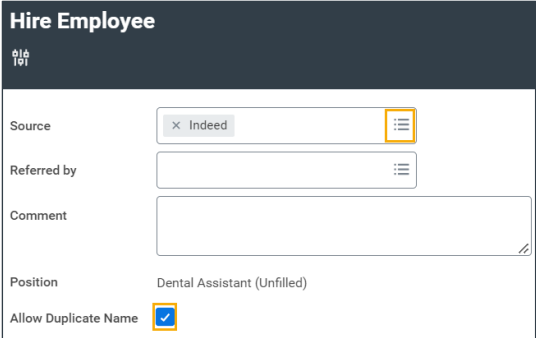
If you are..	Then ...
Hiring an existing person	<ul style="list-style-type: none"> Enter their information into the fields and click Search to locate the person and then Start Hire.
Adding a new person	<ul style="list-style-type: none"> Click Create New Pre-Hire.



5


Under **Hire Employee** complete the following fields and click **OK**.

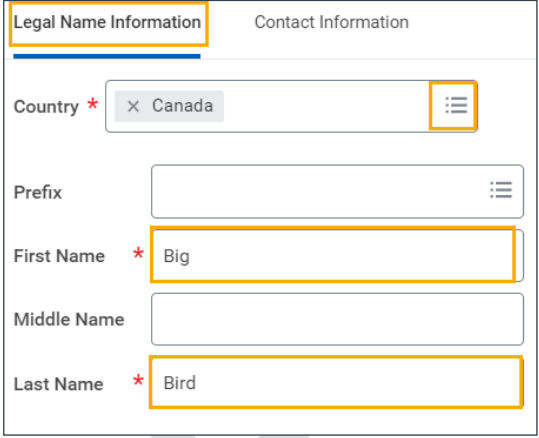
Fields	Description
Source <i>(optional)</i>	Select the prompt  to search for the source of referral.
Referred by <i>(optional)</i>	Select the prompt  to search for who the worker was referred by.
Comment <i>(optional)</i>	Add validating comments if applicable.
Allow duplicate name: <i>(optional)</i>	Check the box to allow for duplicate names.



Talent: Hiring a Temporary Worker

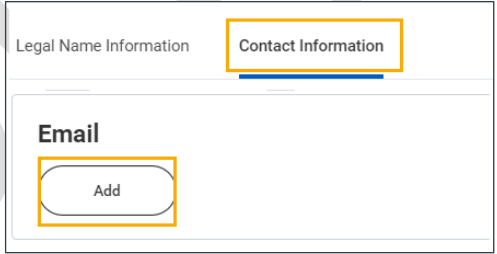
Under **Legal Name Information**, complete the following fields:



Fields	Description
Country*	Defaults to Canada.
Prefix	If it is a group practice, add additional locations.
First Name*	Choose either employee or contingent worker .
Middle Name	Click the prompt  and choose the type from the list.
Last Name	Choose either Full time or Part time .

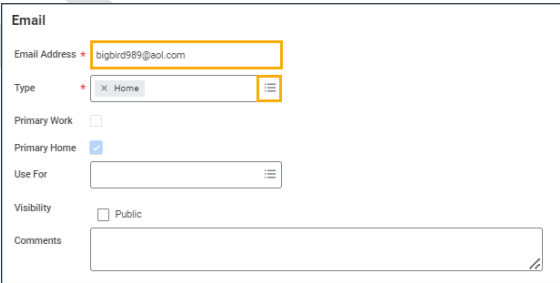


At the pre-hire stage, just an email is necessary.

- Click **Contact Information**
- Click **Add** under **Email**
- Complete the following fields and click **Ok**.



Fields	Description
Email Address*	Enter an email.
Type*	Select the prompt  to choose Home or Work .
Primary Work/Primary Home	This will default depending on what type was chosen above.
Use For	Select the prompt  to Enter either billing or shipping.
Visibility	Check the box for public visibility.
Comments	Enter comments as necessary.





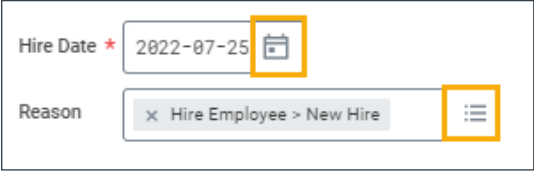
- Review the information in the following screen and click **OK**.

Talent: Hiring a Temporary Worker

6

In the next screen of **Hire Employee**, complete the following:


- Enter the Hire Date* or click the calendar  to select the date of hire.
- Click the prompt  to select a Reason.




The screenshot shows the 'Hire Date' field with the value '2022-07-25' and a calendar icon. The 'Reason' field shows a dropdown menu with 'x Hire Employee > New Hire' selected and a dropdown icon.


In the **Job Details** section:

- Review and confirm that all required information is correct. If you have any questions, please contact your HR Business Partner to make any necessary corrections.



The screenshot shows the 'Job Details' section with the following fields: Position (x Dental Assistant), Job Requisition (JR1086 Dental Assistant (Open)), Employee Type (x Temporary (Fixed Term)), Job Profile (x Dental Assistant), Time Type (x Full time), Location (x Pearly Whites Family Dental Care), and Pay Rate Type (x Hourly). Each field has a dropdown icon.

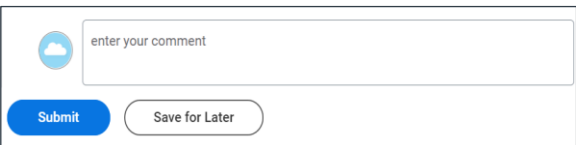
- Under **Additional Information**, confirm **End Employment Date**. If incorrect enter correct day or click the calendar  and select the end employment date.



The screenshot shows the 'End Employment Date' field with the value '2023-07-19' and a calendar icon.

7

- **Submit** to send it for approval.
- **Save for Later** to save the information entered so that you can finish at another time.



The screenshot shows a comment box with the placeholder text 'enter your comment'. Below the comment box are two buttons: 'Submit' and 'Save for Later'.

MORE INFORMATION

- Once you click **Submit**, you will receive a confirmation message and the request will be routed to the HR Business Partner for approval.

Customer Experience Quick Reference Guide

Logging In/Creating an Account: Whether they are a returning customer or a new customer, direct them to the upper right-hand corner to click **Sign In**.

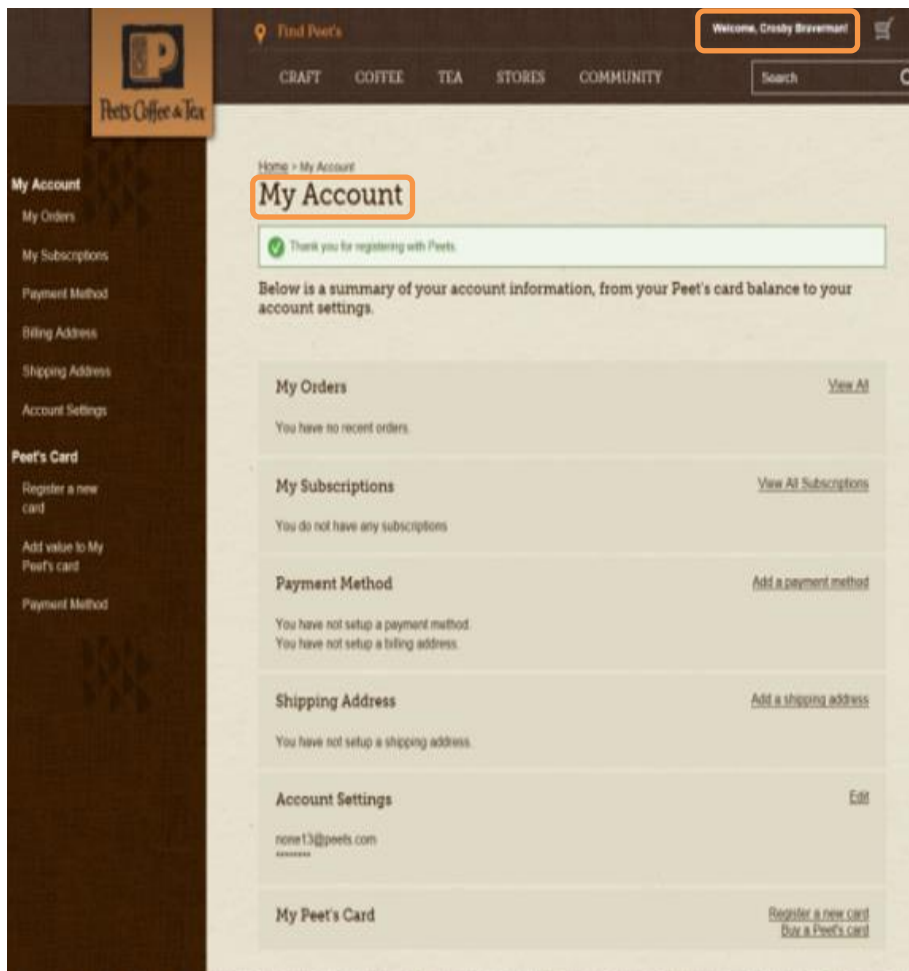


If they are a returning customer, they can sign in on the left-hand side of the screen under **Account LogIn**, using the email that they've signed up with and their password. They will then be taken to their **My Account** Page.

If they would like to create a new account, direct them to the right hand side of the screen to **Create An Account**.

Once they click **Create Account**, the next screen will ask them for First Name, Last Name, Email Address, Password (let them know the criteria**). They can uncheck the box at the bottom, if they would like to opt out of emails with news, events and special offers. Tell them to click Submit.

They will then be directed to their **My Accounts** page, where they can look at a summary of their account information. They will be able to check their past and current orders, view their subscriptions, add payment method (credit card or associate a Peet's Card), add billing and shipping address, edit their account settings (Name, Email and Password) and manage their Peet's Card. They can either make their selections from the left-hand side of the screen, or within the sections located in the middle.



Welcome: Shows the customer what account they are signed into.

My orders: view all orders placed on the account

My subscriptions: view all recurring deliveries on the account

Payment Method: add and edit a credit card or associate a Peet's card.

Billing/Shipping Address: view addresses associated with the account.

Account Settings: change name, email or password.

My Peet's Card: manage their Peet's card

Creating a Job Requisition



1. After the approvals of the new position have occurred, navigate back to your supervisory organization to create a job requisition by typing **SUP:** and the supervisory organization name in the **Search** field. Ex: SUP: Lancaster. This will bring up any supervisory orgs associated with your community. Select the appropriate choice from the list.

Q Sup: Lancaster

Lancaster Healthcare Center (Ron Swanson)
Supervisory Organization

2. Select the **Unable to Fill** tab and locate the position from the Unavailable list.

Members

Details

Staffing

Unavailable to Fill

Roles

Organization Assignments


Unavailable to Fill

A closed or frozen Position, one where the Availability Date hasn't been met, or one with a future dated Fill. If using Required Job Requisitions, Position is also Not Available until there is an open Job Requisition.

Unavailable4 Items

Turn on the new tables view

Position Restrictions	Effective Job Requisitions	Job Profile	Location	Availability Date	Earliest Hire Date	Time Type	Worker Type	Worker Sub-Type
315206P ED (Unfilled)		Executive Director	Lancaster Healthcare Center	01/01/2021	01/01/2021	Full time	Employee	Regular
315210P ED204 (Unfilled)		Executive Director	Lancaster Healthcare Center	01/01/2021	01/01/2021	Full time	Employee	Regular
315215P CNA (Unfilled)		Certified Nursing Aide - AL	Lancaster Healthcare Center	10/06/2021	10/06/2021	Full time	Employee	Regular
315216P CNA (Unfilled)		Certified Nursing Aide - AL	Lancaster Healthcare Center	10/06/2021	10/06/2021	Full time	Employee	Regular

3. Select the actions  button next to the position and **Job Change** from the primary menu and **Create Job Requisition** from the sub-menu.

The screenshot shows the 'Position Restrictions' menu with options: Position Restrictions, Compensation, Favorite, Job Application, Job Change (highlighted), Organization, Payroll, and Roles. A 'Create Job Requisition' button is visible next to the 'Job Change' option. The main area displays '315215P CNA (Unfilled)' with a 'Supervisory Organization' of 'Lancaster Healthcare Center (Ron Swanson)'.

4. In the **Create Job Requisition** screen, check that the information is correct and click **Ok**.

The 'Create Job Requisition' screen shows the following fields: 'Copy Details from Existing Requisition' (empty), 'For Existing Position' (315215P CNA (Unfilled)), and 'Worker Type' (Employee).

5. In the **Recruiting Information** screen, select the pencil icon next to **Reason** field and select the reason. **It is recommended that you always choose External and Internal Posting as the selection.** Enter in the **Recruiting Start Date** and **Target Hire Date** and click **Next**.

The 'Recruiting Information' screen shows the 'Recruiting Details' section with the following fields: 'Reason' (Recruiting > Post - Externally and Internally), 'Replacement For' (empty), 'Recruiting Start Date' (10/06/2021), and 'Target Hire Date' (10/06/2021).

6. The **Job** details screen will pre-populate. If you need to make edits to the Scheduled Weekly hours as this defaults to 40, click into the field and type the number of hours. Click **Next**.

Job

Start

Recruiting Information

Job

Organizations

Compensation

Job Details

Job Posting Title *

CNA

Job Profile *

Certified Nursing Aide - AL

Job Families for Job Profiles

Clinical

Licensed Jobs

Worker Sub-Type *

x Regular

Time Type *



x Full time

Primary Location *

x Lancaster Healthcare Center

Scheduled Weekly Hours

30

7. Review the **Organizations** screen and click **Next** if everything is correct.
8. On the **Compensation** screen, select the pencil  next to the **Amount** to add the hourly rate, if that is how the position is paid. Check the frequency and click the check  mark and **Next** when complete.

Compensation

Summary

Compensation Plan

Hourly Plan

Amount *

12.00

Currency *

x USD

Frequency *

x Hourly

> Additional Details

Assignment Details

12.00 USD Hourly

Next

9. Review all the information on the last screen, select the pencil icon next to the entry if anything needs to be changed. Click **Submit** when complete.

Create Job Requisition

Start

Details


Supervisory Org
Lancaster Healthcare Center (Ron Swanson)

Position
315215P CNA (Unfilled)

Worker Type
Employee

Recruiting Information [Guide Me](#)

Recruiting Details

Reason * 
Recruiting > Post - Externally and Internally

Submit **Save for Later** **Cancel**

Replacement For

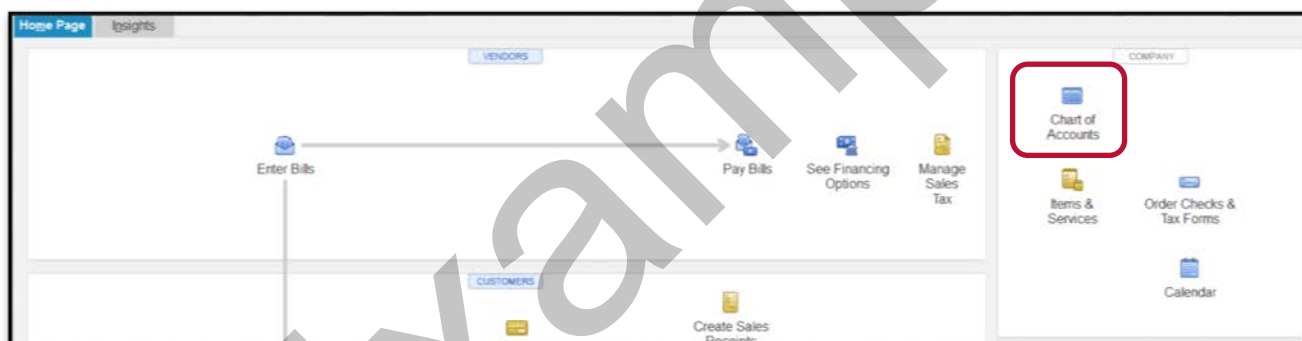
Adding Accounts, Balances and Transactions

Setting Up Your Accounts for the First Time

You will receive your asset list and your loan invoice from GOI accounting approximately 2 weeks after your store opens. Using the Changeover Report you'll need to update the following 6 fields in the Changeover Balances screen with the numbers for your store:

- a. Deposits
- b. Cash in Safe
- c. Supplies
- d. Notes Payable
- e. Equipment
- f. Owner Contribution

2. To get started, Click the **Chart of Accounts** icon on the home page.




3. Locate the **1000-Main Checking** row and double click in the **Balance Total** column.

NAME	TYPE	BALANCE TOTAL	ATTACH
1000 - Main Checking	Bank	1,094.14	
1010 - Tax Savings Account	Bank	0.00	
1020 - Payroll Account	Bank	0.00	
1050 - Cash In Safe	Bank	2,000.00	
11000 - Accounts Receivable	Accounts Receivable	0.00	
1310 - Credit Card Receivables	Other Current Asset	0.00	
1320 - Debit Card Receivables	Other Current Asset	0.00	

Adding Accounts, Balances and Transactions

- Double click in the **Balance** column in the **Changeover Balances** row.

DATE	NUMBER	ACCOUNT	MEMO	PAYEE	PAYMENT	DEPOSIT	BALANCE
07/26/2016	DEP	Changeover Balances				2,000.00	2,000.00
	DEP	1000 - Main Checking [split]	Cash in safe purchased at changeover				

- Edit the date that you took ownership of the store by either typing the date into the **Date** field or clicking the calendar icon  in the **Date** field and choosing the effective date.

Deposit To	Main Checking	Date	07/26/2016	Memo	Changeover balances
Click Payments to select customer payments that you have received. List any other amounts to deposit below:					
RECEIVED FROM	FROM ACCOUNT	MEMO	CHK NO	PMT METH	AMOUNT
	1050 - Cash In Safe	Cash in safe purchased at changeover			-2,000.00
	1700 - Equipment	Equipment purchased at changeover			-81,515.99
	6700 - Supplies 6750 - Store Supplies	Supplies purchased at changeover			-933.10
	1700 - Equipment	Sales taxes paid on equipment			-6,595.93
	6200 - Building Maintenance 6240 - Maint	pre-paid expenses			-891.59
	2510 - Long-Term Note Payable	Loan from GOI			91,736.61

- Select each number in the **Amount** field and type the new numbers from the **Changeover Report** to replace them. Please note that Cash and Prepaid Expenses are included under one lump sum. You'll need to separate the Cash in Safe from the Pre-paid Expenses, and record them accordingly in the Cash in Safe # 1050 and Building Maintenance, subaccount # 6240.

OPERATOR CHANGE			
#		Cost	Sold by GOI
	EQUIPMENT LIST		
	Equipment	\$ 46,226.45	\$ 32,829.10
	Taxable Supplies	933.10	933.10
	Subtotal	47,159.55	33,829.10
	Sales Tax at (8.0%)	Included Above	2,708.33
	Subtotal	47,159.55	36,535.43
	Cash and Prepaid Expenses	2,891.59	2,891.59
		\$ 49,851.14	\$ 39,227.02
			\$ 52,509.59
<div> <div> Purchase Price of # \$ 91,736.61 </div> <div> ** Collateral (see note below) Equipment \$ 81,515.99 Collateral deficit 10,220.62 </div> </div> <div> Total Debt \$ 91,736.61 </div>			

Note: Form UCC-1 (financing statement) will be filed by Grocery Outlet Inc.

Adding Accounts, Balances and Transactions

- Note: Assets are negative numbers and the loan will be entered as a positive number.

Deposit To: 1000 - Main Ch... Date: 07/26/2016 Memo: Changeover balances

Click Payments to select customer payments that you have received. List any other amounts to deposit below.

RECEIVED FROM	FROM ACCOUNT	MEMO	CHK NO.	PMT METH	AMOUNT
	1050 - Cash In Safe	Cash in safe purchased at changeover			2,000.00
	1700 - Equipment	Equipment purchased at changeover			-81,515.99
	6700 - Supplies 6750 - Store Supplies	Supplies purchased at changeover			-933.10
	1700 - Equipment	Sales taxes paid on equipment			-6,595.93
	6200 - Building Maintenance 6240 - Maint...	pre-paid expenses			-691.59
	2510 - Long-Term Note Payable	Loan from GOI			91,736.61

7. Click **Save & Close** once all entries have been updated.

Deposit To: 1000 - Main Ch... Date: 07/26/2016 Memo: Changeover balances

Click Payments to select customer payments that you have received. List any other amounts to deposit below.

RECEIVED FROM	FROM ACCOUNT	MEMO	CHK NO.	PMT METH	AMOUNT
	1050 - Cash In Safe	Cash in safe purchased at changeover			2,000.00
	1700 - Equipment	Equipment purchased at changeover			-81,515.99
	6700 - Supplies 6750 - Store Supplies	Supplies purchased at changeover			-933.10
	1700 - Equipment	Sales taxes paid on equipment			-6,595.93
	6200 - Building Maintenance 6240 - Maint...	pre-paid expenses			-691.59
	2510 - Long-Term Note Payable	Loan from GOI			91,736.61

To get cash back from this deposit, enter the amount below. Indicate the account where you want this money to go, such as your Petty Cash account.

Cash back goes to: Cash back memo: Cash back amount: 0.00

Save & Close Add & New Revert

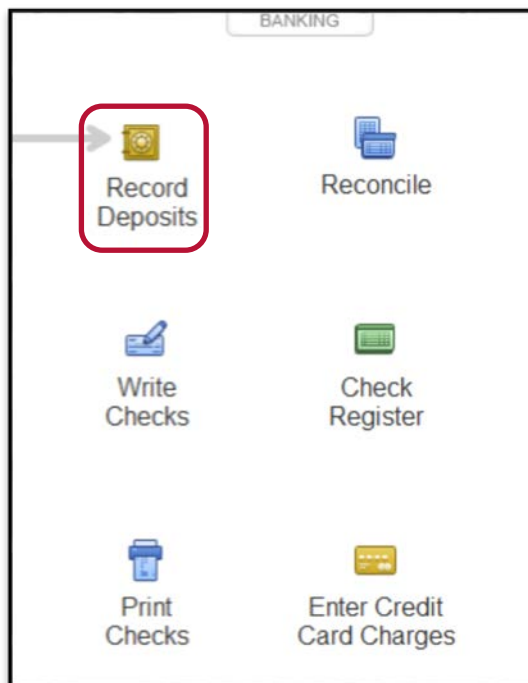
Entering Personal Contributions

Personal contributions are expenses related to corporate filings, travel and any other out of pocket expenses incurred before changeover.

You should also record your personal investment toward your new business. Record it as a deposit. For this training you'll need to record a \$15,000 deposit.

1. Click the **Record Deposits** icon on the home page.

Adding Accounts, Balances and Transactions



2. Select **Main Checking Account** under Deposit To field. Enter the date **7/16/16** in the Date field. Type **"Owners Contribution #3005"** in the FROM ACCOUNT field and it will populate the account. Type **Personal Investment** in the MEMO field. Enter the **\$15,000** under the AMOUNT field. Click **Save & Close**.

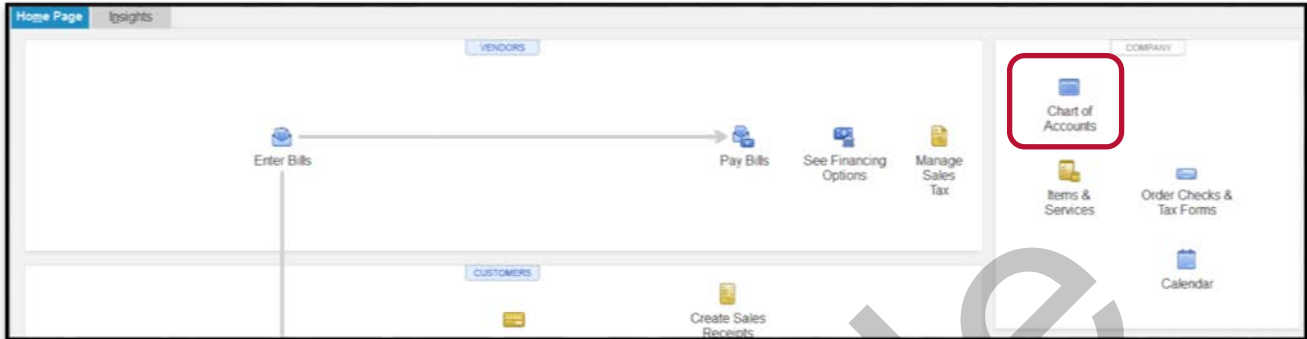
A screenshot of the deposit entry form. The 'Deposit To' field is set to '1000 - Main Ch...'. The 'Date' is '07/16/2016'. The 'Memo' is 'Deposit'. The 'FROM ACCOUNT' field is '3005 - Owner Contribution'. The 'MEMO' field is 'Personal Investment'. The 'AMOUNT' field is '15,000.00'. The 'Deposit Subtotal' is '15,000.00'. The 'Deposit Total' is '15,000.00'. The 'Save & Close' button is highlighted with a red box.

RECEIVED FROM	FROM ACCOUNT	MEMO	CHK NO.	PMT METH	AMOUNT
	3005 - Owner Contribution	Personal Investment			15,000.00

Adding Accounts, Balances and Transactions

Recording Expenses

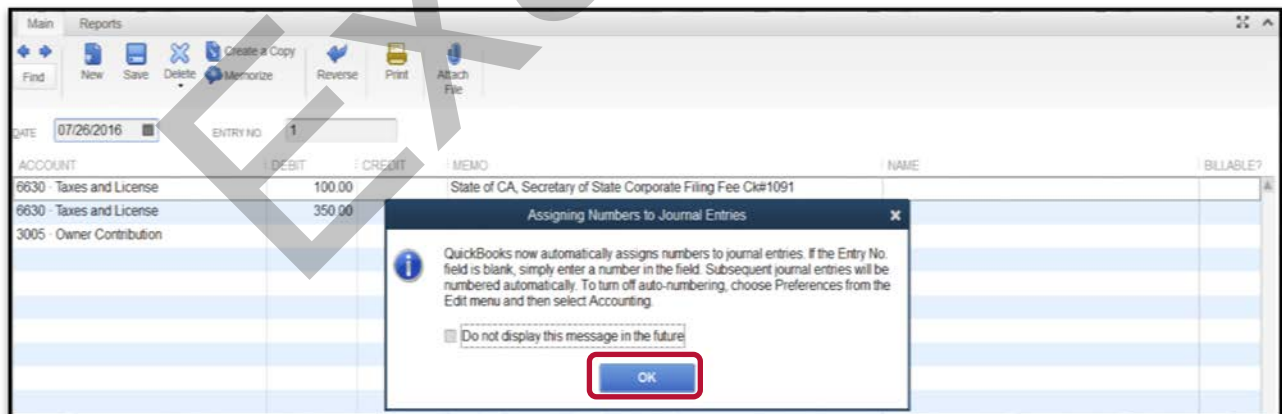
1. To record expenses, click the **Chart of Accounts** icon on the home page.



2. Locate the **3005-Owner Contribution** row and double click in the **Balance Total** column.

+2300 - Credit Card - Business Only	Credit Card	0.00
+2500 - Note Payable	Long Term Liability	0.00
+2510 - Long-Term Note Payable	Long Term Liability	91,736.61
+3000 - Opening Bal Equity	Equity	0.00
+3005 - Owner Contribution	Equity	450.00
+3010 - Owner Draw - Personal	Equity	0.00
+3030 - Owner Draw - Federal Taxes	Equity	0.00
+3040 - Owner Draw - State Taxes	Equity	0.00
+3900 - Retained Earnings	Equity	0.00
+4000 - Sales	Income	

3. Double click on the sample transaction. A pop-up window appears informing you that QuickBooks automatically assigns numbers to journal entries. Click **OK** to close the window.



4. Update the date in the **DATE** field to your business open date.

Adding Accounts, Balances and Transactions

ACCOUNT	DEBIT	CREDIT	MEMO	NAME	BILLABLE?
6630 - Taxes and License	100.00		State of CA, Secretary of State Corporate Filing Fee Ck#1091		
6630 - Taxes and License	350.00		State of CA, Secretary of State Expedited Service Fee Ck#1092		
3005 - Owner Contribution		450.00	State of CA, SOS Corporate Filing Fee (\$100)&Expedited Service (\$350)		

5. To make a change to an amount, select the amount in the **Debit** column and type the new amount.

- *Note: When adding new expenses you need to make sure that the Debits equal the Credits. This balances your journal entry.*

ACCOUNT	DEBIT	CREDIT	MEMO
6630 - Taxes and License	200.00		State of CA, Secretary of State Corporate Filing Fee Ck#1091
6630 - Taxes and License	350.00		State of CA, Secretary of State Expedited Service Fee Ck#1092
3005 - Owner Contribution		450.00	State of CA, SOS Corporate Filing Fee (\$100)&Expedited Service (\$350)

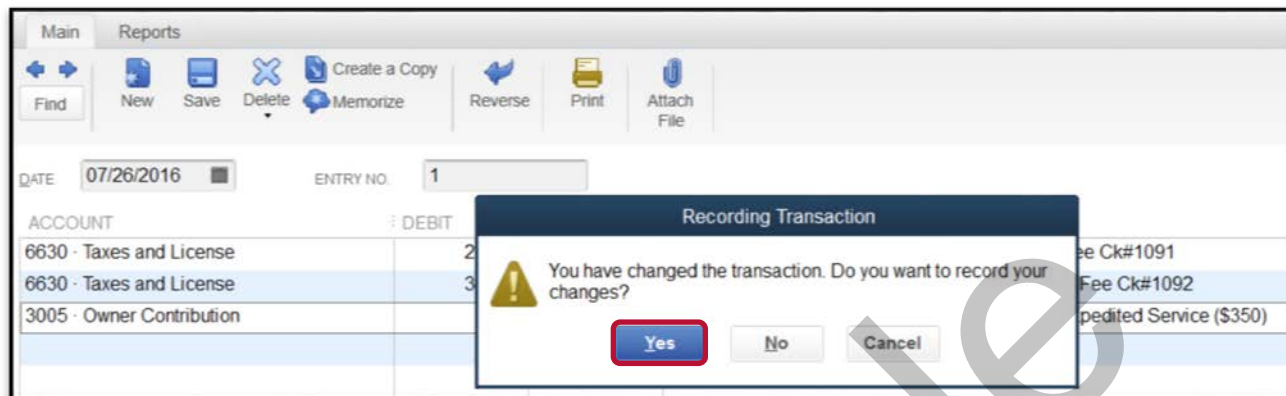
6. Next, you'll need to update the **CREDIT** column to reflect the **DEBIT** column. Select the amount in the Credit column and type the new amount. Click **Save & Close** to save your changes.

ACCOUNT	DEBIT	CREDIT	MEMO	NAME	BILLABLE?
6630 - Taxes and License	200.00		State of CA, Secretary of State Corporate Filing Fee Ck#1091		
6630 - Taxes and License	350.00		State of CA, Secretary of State Expedited Service Fee Ck#1092		
3005 - Owner Contribution		350.00	State of CA, SOS Corporate Filing Fee (\$100)&Expedited Service (\$350)		

Save & Close Save & New Revert

Adding Accounts, Balances and Transactions

7. A Recording Transaction pop-up window will inform you that you have changed the transaction and asks "Do you want to record your changes?". Click **Yes** to continue.

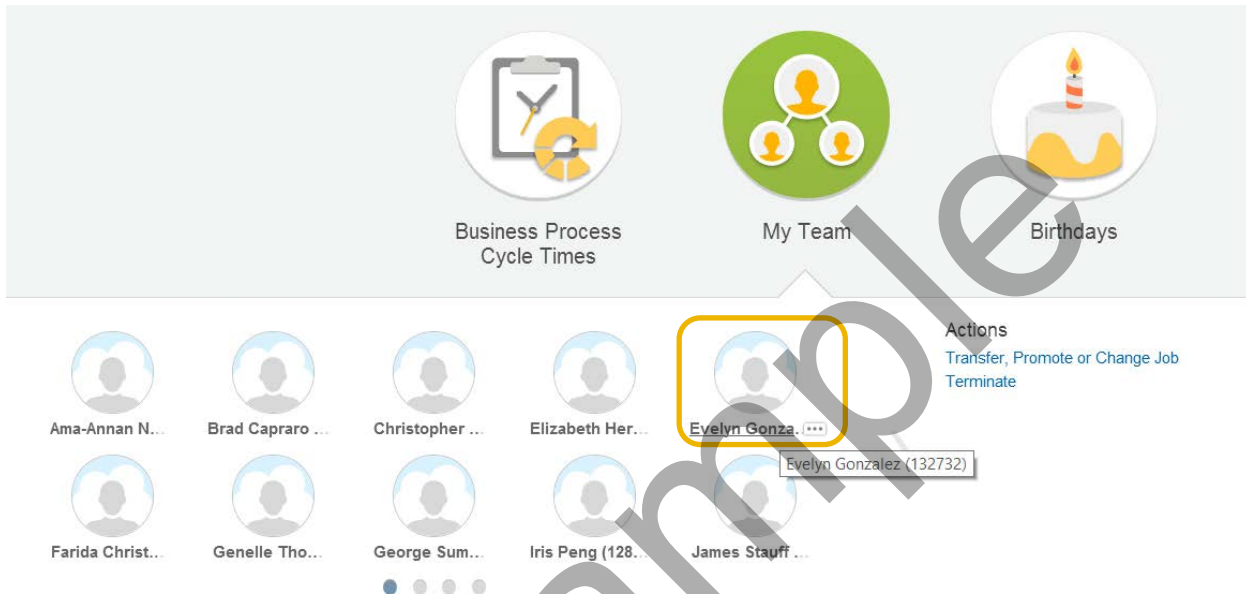


Changing Compensation

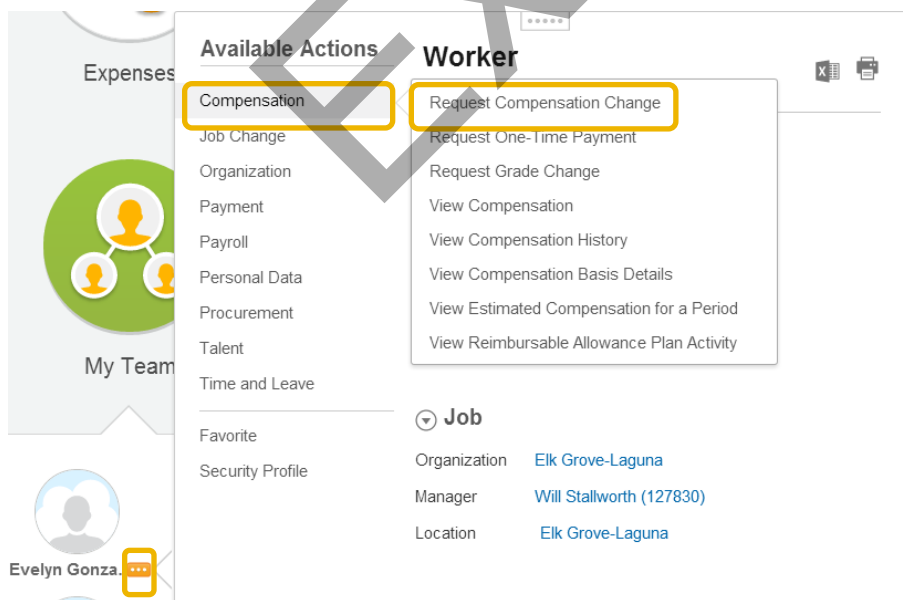
After reviewing this material you will be able to change compensation.

- Note: Does not apply to Insurance Agents, Life Insurance Agents or Travel Counselors.


1. Log-into Workday. Navigate to **My Team**. Locate the employee that you need to change compensation for.



2. Select the **Related Actions** icon  to the right of the employee name. Select **Compensation** and **Request Compensation Change** from the **Available Actions** menu.





3. The system will default the effective date to the first day of the next available payroll. No other date should be selected without consulting HR. Select the **Prompt** icon  from the **Reason** field to display the **Reason** sub menu. Choose a reason from the sub menu and click **OK**.

Request Compensation Change


All compensation changes **MUST begin as of the next Pay Period begin date.**

The next four available **NON-EXEMPT** Pay Period begin dates are:
 11/2/2013
 11/16/2013
 11/30/2013
 12/14/2013


The next four available **EXEMPT** Pay Period begin dates are:
 11/9/2013
 11/23/2013
 12/7/2013
 12/21/2013


Please ensure that the **Effective Date** of the requested compensation change is on or after the **begin date.**

To view the complete 2013 pay schedule, please click here: [2013 Pay Schedule](#)

Effective Date * 04/05/2014 

Use Next Pay Period ☒


Reason * 



Employee * Heidi Kazemi (131019) 

Reason Sub Menu:

- Request Compensation Change > Base Salary Change
- Request Compensation Change > Conversion
- Request Compensation Change > Variable Compensation Change

Buttons: OK Cancel

4. Select the **Edit** icon  at the end of the **Hourly or Salary** row under the proposed column as appropriate. Only make changes to this pay rate section.

Total Base Pay	Total Base Pay	33,987.20 USD Annual	No Change
Guidelines	Pay Range	33,000.00 - 49,600.00 USD Annual	No Change 
Salary			+
Hourly			+
Assignment Details 16.34 USD Hourly Plan Name: Hourly Plan Effective Date: 10/28/2013 No Change 			
Period Salary			+
Unit Salary			+
Allowance			+
Ment			+

5. Enter the new amount into the **Amount** field. Or enter amount to be changed into the **Amount Change** field, depress the tab key and the system will calculate the new rate accordingly. Or enter the percent change into the **Percent Change** field. Click **Done** when finished.



Proposed

Compensation Plan

Hourly Plan

Total Base Pay

33,000.00 - 49,600.00 USD Annual

No Change

No Change

+

+

Assignment Details

+

Amount

20.34

Amount Change

4.00

Percent Change

24.48

Currency

USD

Frequency

Hourly

Additional Details

Assignment Details

20.34 USD Hourly

Done

6. Provide details supporting the change in pay in the **Comment** field. Click **Submit** when finished. Choose **Save for Later** or **Cancel** as needed.

enter your comment

Submit

Save for Later

Cancel

View Comments (0)

Process History

Related Links

7. A "Process Successfully Completed" notification displays. Click **Done** to exit.

You have submitted

[Compensation Change: Evelyn Gonzalez \(132732\) - Sales Service Assoc](#)

✓

Process Successfully Completed

Details and Process

Done

6 Steps of Data-Driven Decision Making

1

Step 1
Define
Objective



2

Step 2
Establish
Hypothesis



3

Step 3
Collect, Organize
& Validate the Data



4

Step 4
Summarize &
Analyze Information



5

Step 5
Synthesize &
Prioritize Knowledge



6

Step 6
Decide, Create
Story & Implement





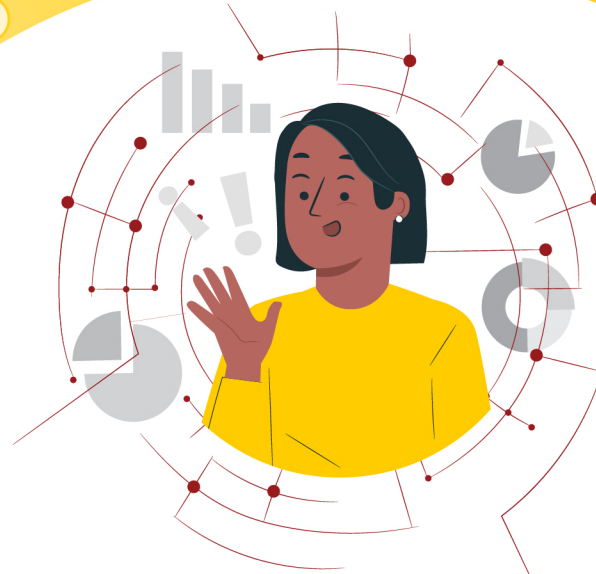
...guide strategic business decisions to align with goals, objectives, and initiatives...



...by analyzing collected data, and drawing insights...



Facts, metrics, and data...



...to benefit a business or organization.

Data-Driven Decision Making