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**Change Agent Network
Monthly Meeting
April 2023**



What questions did your colleagues have?

(feel free to put your answer in the chat)

Agenda

- Requisitions
 - Demo
 - Q&A
- Training Strategy
- Workday Website & Resources
- Key Messages, Next Steps, & Questions

Reminder: Add questions/suggestions in the chat throughout the meeting!

Requisitions

Heather White

Assistant Director of Procurement Services

Workday Role: Project Lead, Procurement



Procure-to-Pay

1. Sourcing / RFQ
2. Requisitions
3. Purchase Orders
4. Change Orders
5. Receipts
6. Invoices
7. Payment

Workday Requisition Benefits

- The requisition process in Workday is much simpler than the requisition process in Banner
- FOAP information (with Workday, called FDM information) will be gathered at the beginning of the process rather than entering into OnBase after the invoice is received
- No processing time between requisition and PO – once a requisition is fully approved, it is automatically transitioned into a PO
- Easily manage purchase order balances and see accounting information for purchases
- Ability to copy past requisitions and use templates for frequent purchases
- Ability to do one requisition for multiple suppliers – separate PO's for each supplier will automatically be generated

Requisition Overview & Types

- A requisition will be required for all purchases that will be paid with an invoice
- Honorariums, stipends, and other purchases without an invoice will utilize a separate process and will not be paid using requisitions
- Departmental use of purchasing card bypasses requisition process
- There are 3 types of requisitions:
 - ▼ **Select an Option**

[Search Catalog](#)

Search the internal catalog of preferred items and suppliers to add into the shopping cart

[Request Non-Catalog Items](#)

Add a good or service that is not in the catalog

[Connect to Supplier Website](#)

Utilize this link to punchout to a supplier's external website

(Amazon, Office Depot, Grainger, McKesson)



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Workday Requisition Demo



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What do you think of
requisitions and what **general**
questions do you have?

Training Methodology / Activities

1

Assess & Plan

- Change & Training Impact Assessment
- Curriculum Planning
- Learning Design Roadmap

FEB-MAY

2

Develop & Prepare

- Materials Development
- Training Preparation

JUN-SEP

3

Deliver & Sustain

- Training Delivery
- Training Support & Maintenance
- Rolling Adoption Training

OCT-JAN+

Curriculum Planning

- Confirm training topics and courses
- Prioritize topics that have a high training impact
- Determine what does a curriculum look like for these end user groups:
 - All faculty/staff
 - C5s / PSS
 - Managers
 - Cost center managers
 - Hourly workers

Learning Design Roadmap – Training Formats

Type of Training Formats	High-level Description
Change Guides	Documents current and future state of high impact changes. Pre-requisite resource for training.
Info Sheets	Printed and/or online supported documentation that is topic-driven or for a particular task. These are often used in conjunction with ILT, webinar and/or online (self-paced) trainings.
Job Aids (Step-by-step guides)	Printed or online step-by-step (procedural) support that focus on specific tasks, rather than broad topics. These are used in conjunction with ILT, webinar and/or online training.
Video Demos / Tutorials	Videos that simulate a series of steps within Workday for informal, on-demand education purposes. Tutorial videos will also be developed and incorporated as curriculum-based material.
Instructor-led Training (ILT)	Instructor-led training will be delivered via Zoom or in a classroom setting. Hybrid learning includes both face-to-face and virtual registrants. All sessions will be facilitated by a GVSU trainer and materials will be accessible online to increase user engagement via simulation-based training with the assistance of a training environment, interactive course materials and video demonstrations. Training location options will include a multimedia classroom/lab, along with the assistance of Zoom and/or Microsoft Teams for virtual registrants.
Self-paced Online Learning (web course)	Learners review training coursework and web course modules at their own pace on their computer (asynchronous learning) by registering for the web course.
Virtual Office Hours	A virtual setting with office hours with a designated subject matter expert. Office hour sessions are open-ended and may accommodate various business processes but will be scheduled based on workstream needs. Some sessions may be targeted and advertised to targeted user groups. Users will be able to get on-demand (step-by-step) coaching on specified business processes.
Learning Labs	Learners meet in a working session, led by designated subject matter experts, to practice real-time system scenarios. These labs are generally topic specific to accommodate targeted user groups and business processes. Labs are generally one-on-one and accommodate on-demand learning. A room or virtual setting with office hours will be published so that each user can bring a specific transaction and get help with entering that transaction.



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Workday Website & Resources

Key Messages - Requisitions

- The entire Purchase-to-Pay (P2P) process from sourcing through payment will occur in Workday
- A requisition is one of the first P2P steps, and all purchases will require a requisition
- Entering a requisition in Workday is much easier than in Banner
- There are many other benefits to using Workday for procurement
- There are 3 types of requisitions: catalog, non-catalog, and connect to supplier
- More information will be coming soon on other aspects of the P2P process including receipts and invoices



Next Steps

- Encourage leaders to attend the Workday for Managers kickoff on Wed. 4/26
- Review follow-up email
- Review the monthly Workday newsletter
- Share key messages at team meetings, etc.
- Collect any questions from colleagues
- Next meeting:
 - May 10 & 11
 - One onsite option, one Zoom option



Questions?