GRAND VALLEY STATE UNIVERSITY
PROCUREMENT SERVICES

WORKDAY UNIFIED SUPPLIER PORTAL (USP) GUIDE

HELLO SUPPLIERS!

Thank you for your continued support of Grand Valley State University! In 2024, GVSU went live with Workday as the system to manage all financial related information. In August 2026, GVSU implemented Workday's Unified Supplier Portal (USP) which gives suppliers access to more information and actions across both Workday Strategic Sourcing and Workday. This guide will give you step-by-step directions on how to manage company information as well as access purchase orders and invoices. If you have any questions, please contact us at the email address below. We appreciate your partnership with GVSU!

PROCUREMENT SERVICES

suppliers@gvsu.edu

www.gvsu.edu/purchasing/suppliers

Grand Valley State University

TABLE OF CONTENTS

INTRODUCTION TO WORKDAY'S UNIFIED SUPPLIER PORTAL

Workday's Unified Supplier Portal (USP) allows you to sign up with Workday Central Login (WCL) to access Strategic Sourcing and Procurement information in one place. After signing up and logging into the USP, you can access:

- Action Items
- Contact and Banking Information
- Contract Negotiations
- Events (RFP's and Auctions)
- Forms
- Invoices and Payments
- Performance Reviews
- Purchase Orders

To create an account, you need to verify your email, set up a strong password, and pair your authenticator app. Please see our Registration Guides for more information on setting up an account.

HELPFUL LINKS

GVSU Supplier Website	Visit the GVSU supplier website for information, updates and announcements. All links are available on this website as well.
Supplier Registration	New suppliers only! Register as a supplier with GVSU
Public Bid Opportunities	View public bid opportunities. Open and closed opportunities will be available as of April 22, 2024.
Bid Archive	All closed bids prior to April 22, 2024.
Contacting Strategic Sourcing	For help with Strategic Sourcing, suppliers can use the "Support" tab in their account or email scoutsupport@workday.com

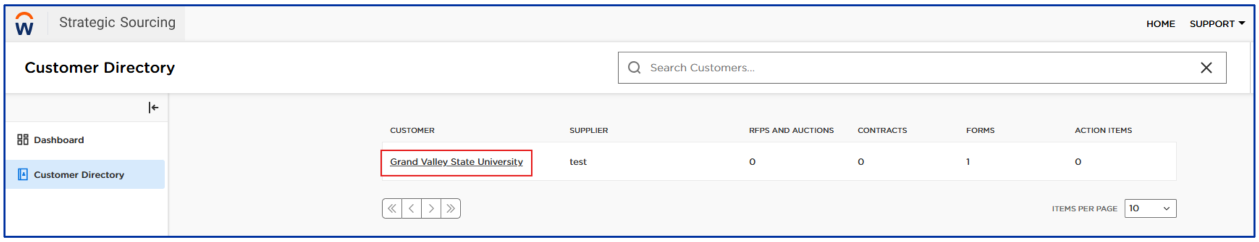
UNIFIED SUPPLIER PORTAL GUIDE

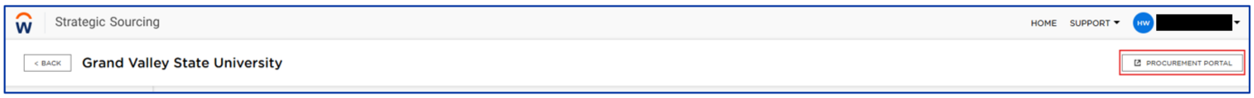
Workday's Unified Supplier Portal allows you to manage your own company information and view and complete various transactions. You can choose to manage your company information in either Workday or Strategic Sourcing depending on your preferences.

We recommend regularly reviewing your company contacts to ensure that access is granted only to legitimate accounts. Contacts with your company have the ability to update all company information, including payment details and banking information. It is important to ensure that only appropriate contacts at your company have this access to ensure your information is safe and secure.

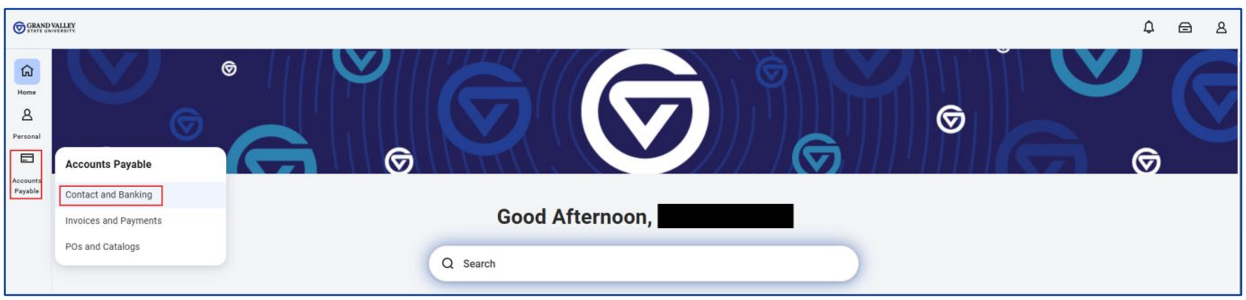
UPDATING COMPANY INFORMATION IN WORKDAY

1. After logging in using Workday Central Login, select **Grand Valley State University** from your **Customer Directory** and then click **PROCUREMENT PORTAL** to access your company information.





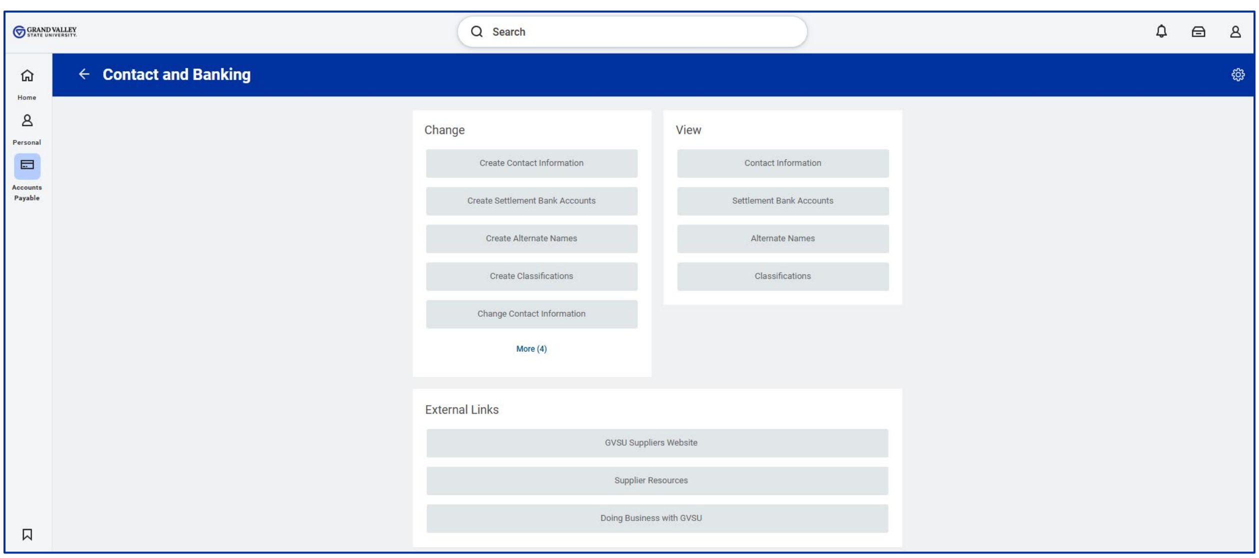
2. The Workday Procurement Portal will open in a new tab. Hover over **Accounts Payable** and select **Contact and Banking** to access your company information.



3. The following options are available:

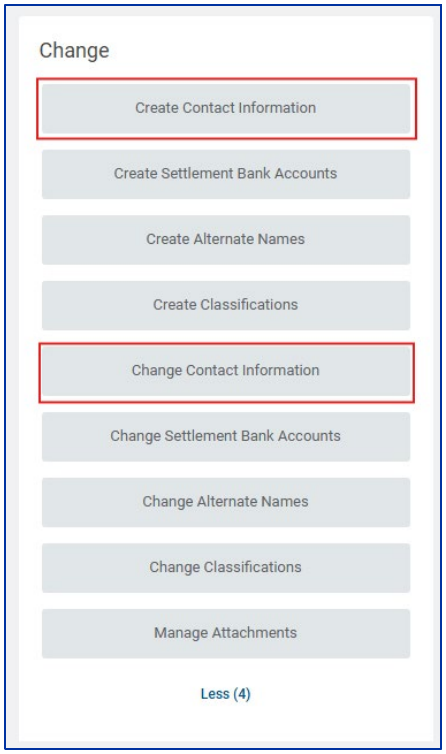
Option	Purpose
Change	
Create Contact Information	Create new contact information: • Phone • Address • Email • Instant Messenger • Web Adress
Create Settlement Bank Accounts	Create a new settlement bank account for EFT payments from GVSU
Create Alternate Names	Create a new alternate name for your company
Create Classifications	Create a new diverse supplier classification: • African American Owned Business • Asian Indian American Owned Business • Asian Pacific American Owned Business • Disabled Person (DP) • Disabled Veteran Owned Business • Disadvantaged Business Enterprise • Hispanic American Owned Business • HUBZone Business Enterprise • Lesbian, Gay, Bisexual, Transgender, Queer (LGBTQ)

	• Minority Business Enterprise • Native American Owned Business • Non-Minority • Small Disadvantaged Business • Veteran Owned Business
Change Contact Information	Make changes to existing contact information • Phone • Address • Email • Instant Messenger • Web Adress
Change Settlement Bank Accounts	Make changes to existing settlement bank accounts for EFT payments from GVSU
Change Alternate Names	Make changes to existing alternate names
Change Classifications	Make changes to existing diverse classifications
Manage Attachments	Upload additional attachments to your supplier account
View	
Contact Information	View contact information • Phone • Address • Email • Instant Messenger • Web Adress
Settlement Bank Accounts	View settlement bank accounts for EFT payments from GVSU
Alternate Names	View alternate company names
Classifications	View current diversity classifications
External Links	
GVSU Suppliers Website	Link to GVSU suppliers website that contains helpful links and resources
Supplier Resources	Link to GVSU suppliers resources website for guides and demo videos
Doing Business with GVSU	Link to Doing Business with GVSU website

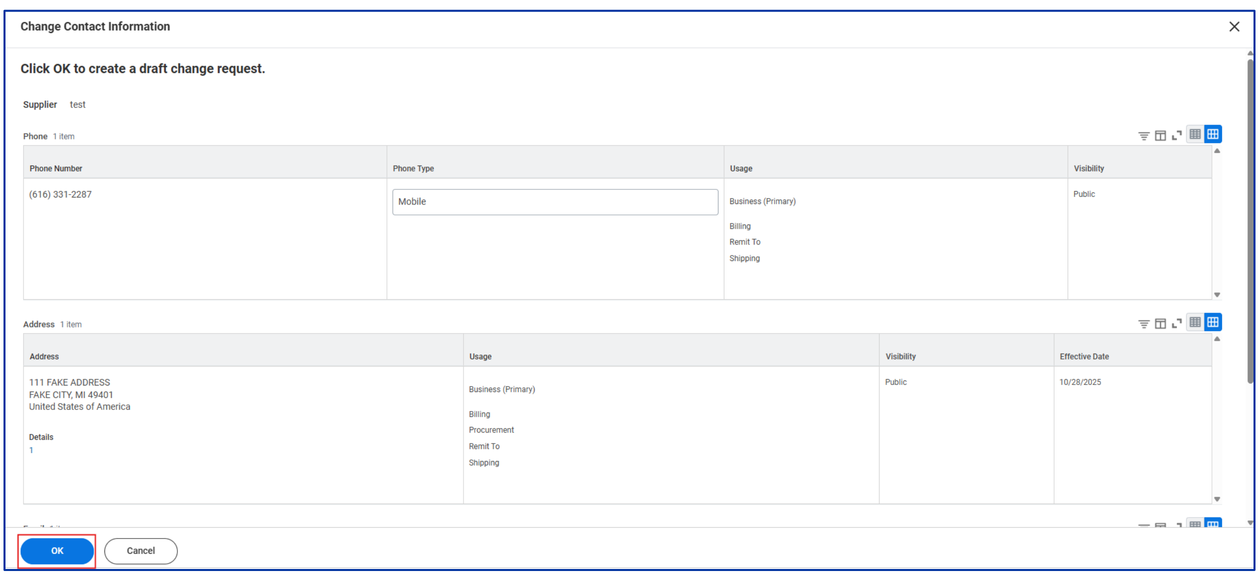


UPDATING CONTACT INFORMATION

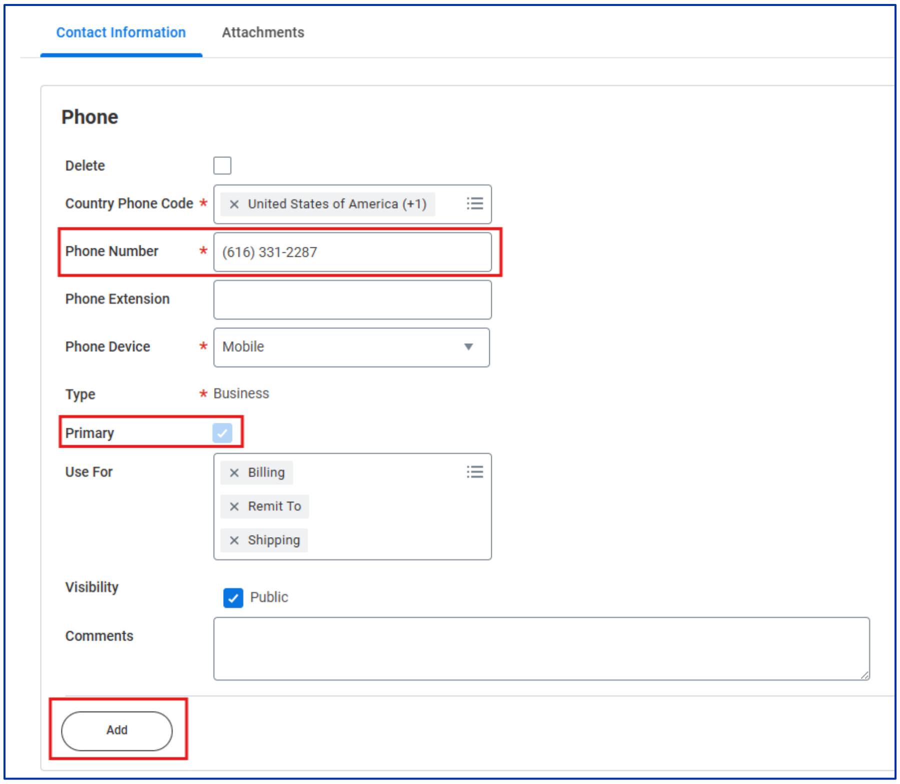
1. If you would like to update existing contact information, click **Change Contact Information**, if you would like to add new contact information, click **Create Contact Information**.



2. Click **OK** to start a draft change request.

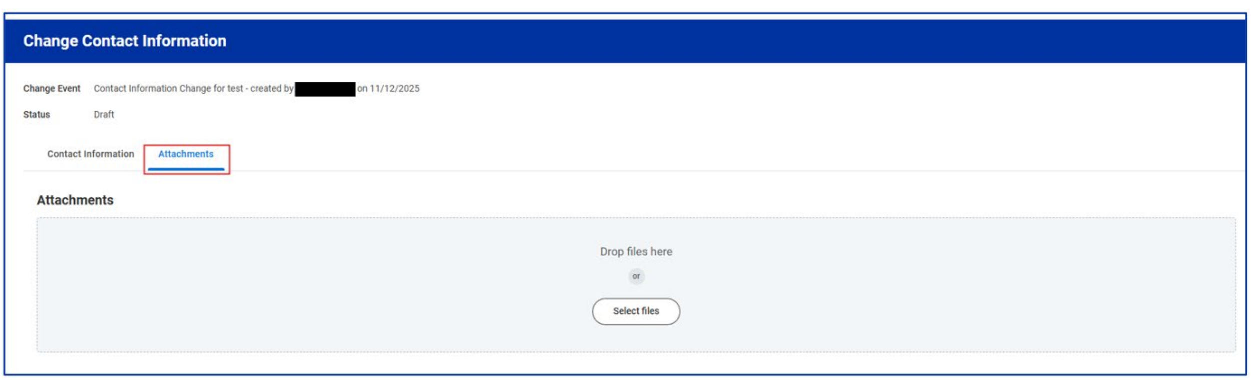


3. If you want to add any contact information, click **Add**. If you want to make changes to existing information, click into the open fields and make your changes. Required fields are marked with a red asterisk *.

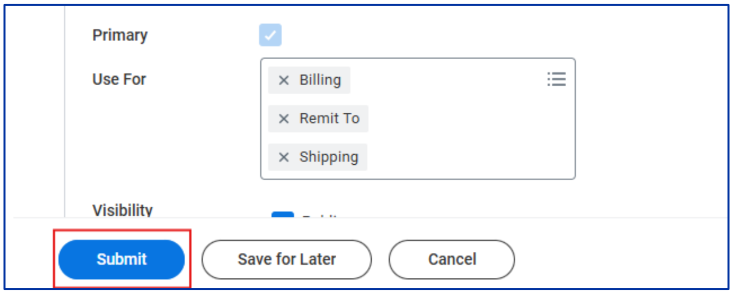


*Please note, if you have multiple options for any contact information section, one must be marked as **Primary** by selecting the checkbox. Please do not **Delete** any existing information. Instead, please add new information and mark your preferred option as **Primary**. You may add comments to any section if something should be inactivated or not used again and we can update it for you. Deleting information causes errors in the system.*

4. You have the option to upload any attachments to support your change by navigating to the **Attachments** tab at the top of the screen.



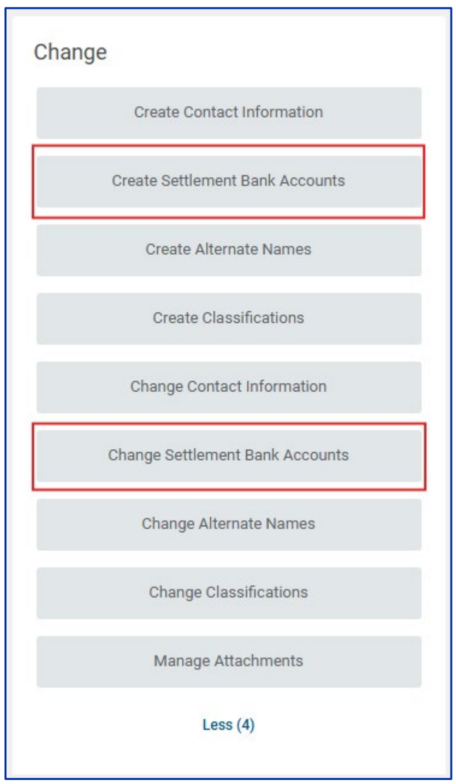
5. Once you are finished with your change, click **Submit** at the bottom of the screen.



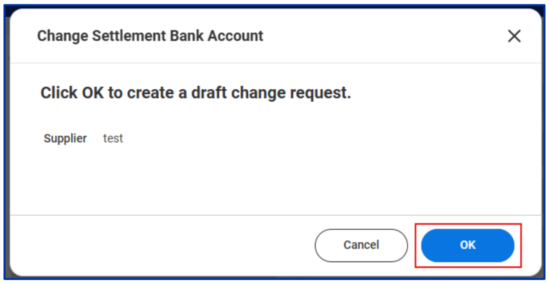
After submitting your change, it will be sent to GVSU's Supplier Administrator to validate and approve the change. If you have any questions about your change, please email suppliers@gvsu.edu.

UPDATING SETTLEMENT BANK ACCOUNTS

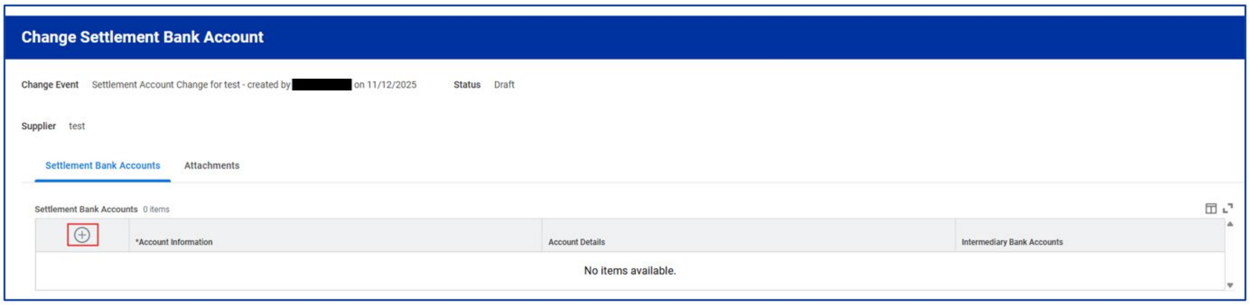
1. If you would like to update existing settlement bank account information, click **Change Settlement Bank Accounts**, if you would like to add a new bank account, click **Create Settlement Bank Accounts.**



2. Click **OK** to start a draft change request.

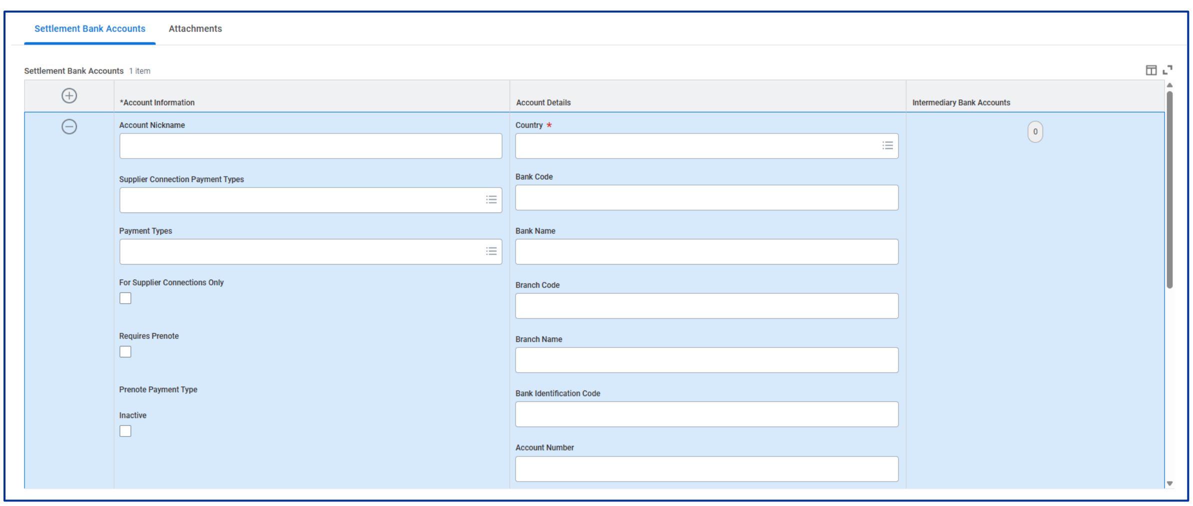


3. Click the plus button (**+**) to add a new bank account.



4. Fill in the required information. Please include a banking document attachment (bank statement, voided check, bank letter) in the attachments tab.

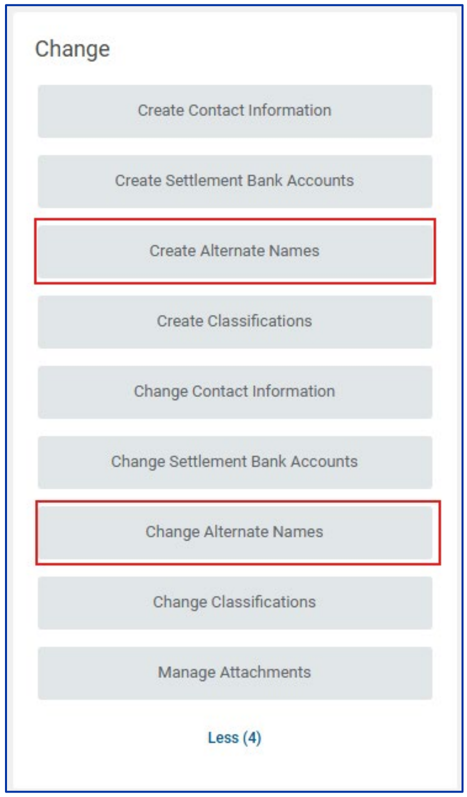
Required Field	Instructions
Supplier Connection Payment Type	Please choose EFT
Payment Types	Please choose EFT
Country	Enter the country of your bank account
Routing Transit Number	Enter the routing transit number for your account
Bank Name	Enter the full name of the bank
Account Number	Enter your bank account number
IBAN	Required for international bank accounts



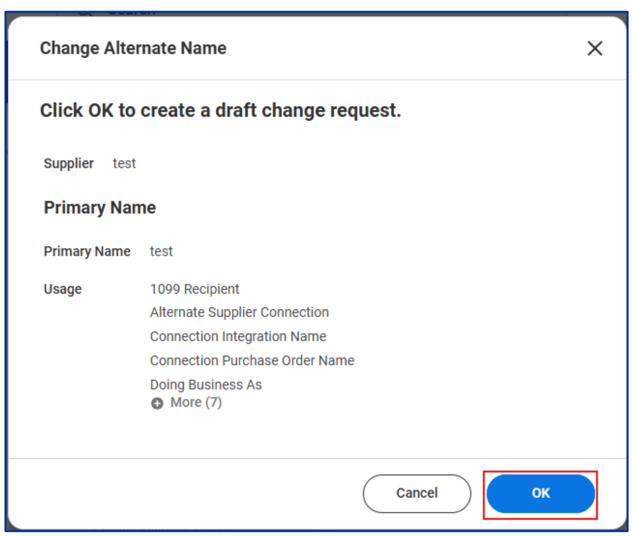
5. Once you are finished with your change, click **Submit** at the bottom of the screen.

UPDATE ALTERNATE NAMES

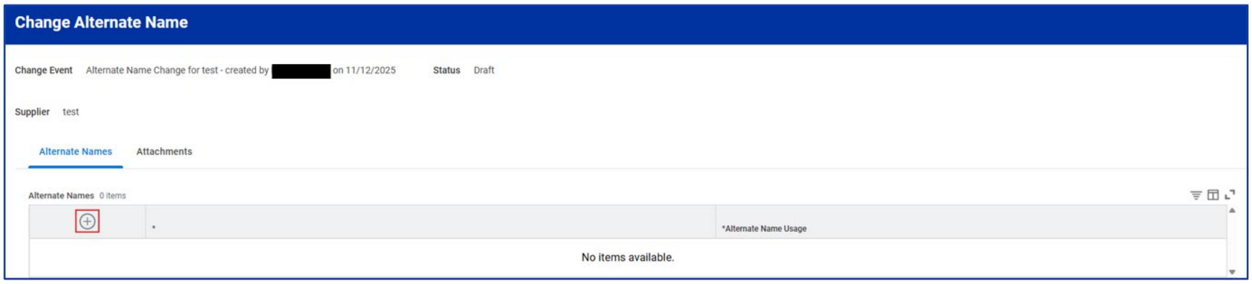
1. If you would like to update an existing alternate name (DBA), click **Change Alternate Names**, if you would like to add a new alternate name (DBA), click **Create Alternate Names**.



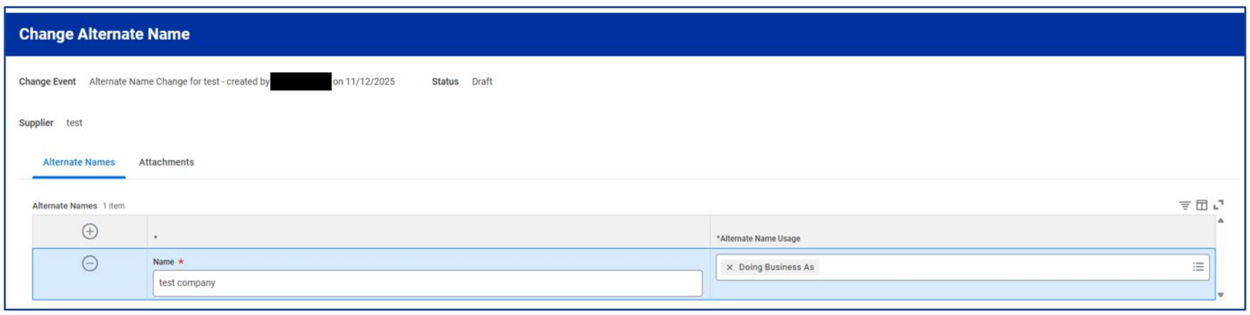
2. Click **OK** to start a draft change request.



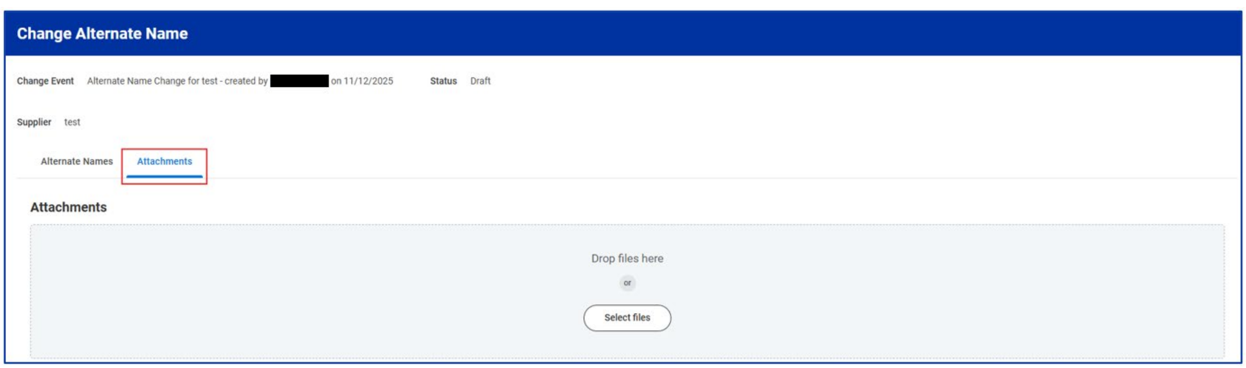
3. Click the **+** to add a new alternate name



4. Enter the alternate name and then select the appropriate alternate name usage(s).



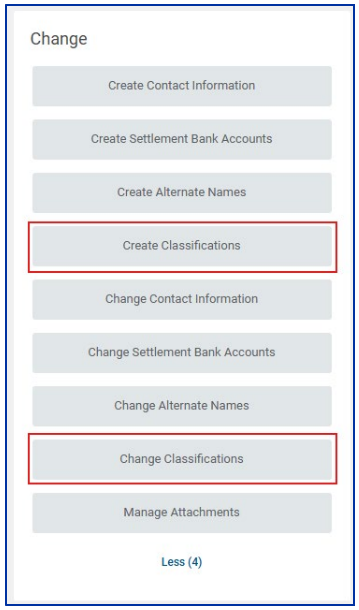
5. If there are any attachments supporting this change request, upload them using the **Attachments** tab.



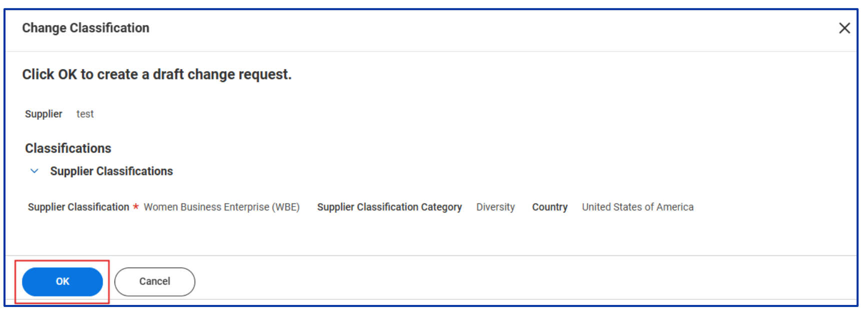
6. Once you are finished with your change, click **Submit** at the bottom of the screen.

UPDATE CLASSIFICATIONS

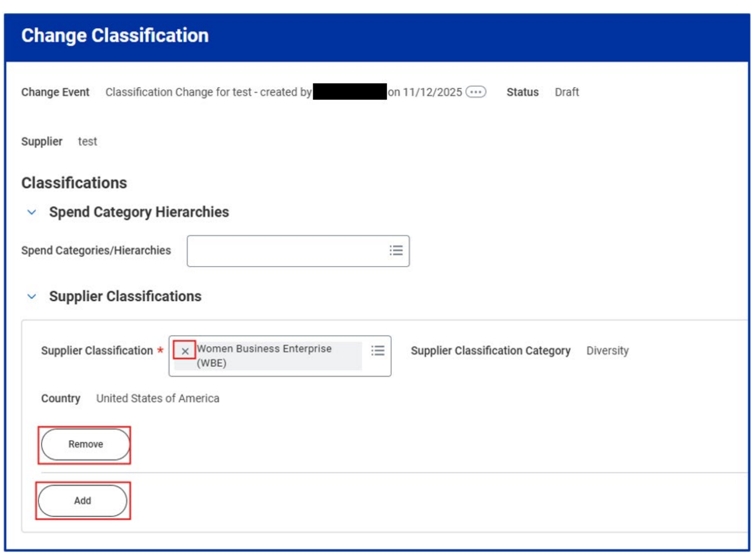
1. If you would like to update existing classifications, click **Change Classifications**, if you would like to add new classifications, click **Create Classifications.**



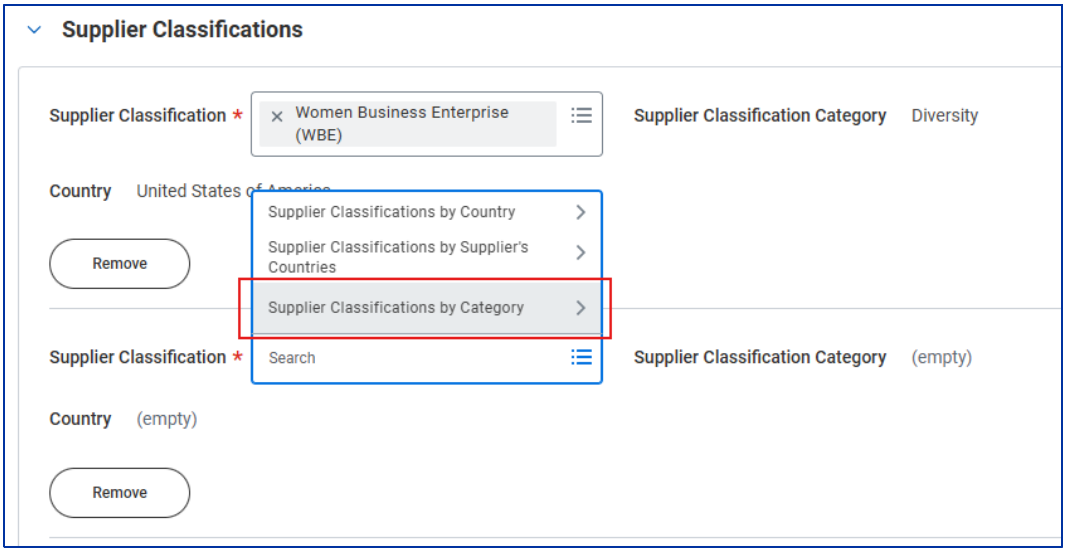
2. Click **OK** to start a draft change.



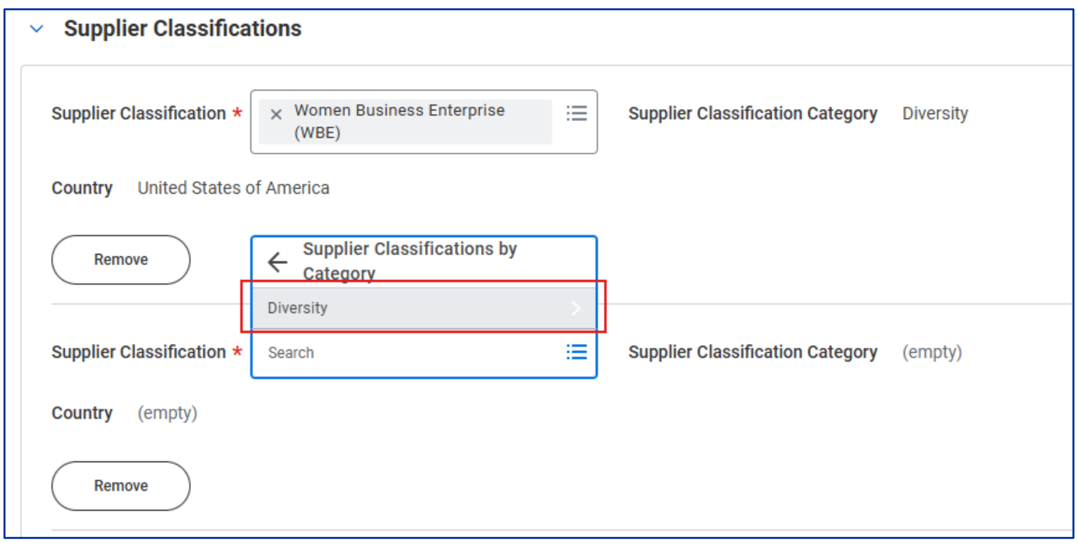
3. To remove any existing classifications, click **Remove**. To update an existing classification, click the **x** to remove the current selection and replace it with a different one. To add an additional classification, click **Add**.



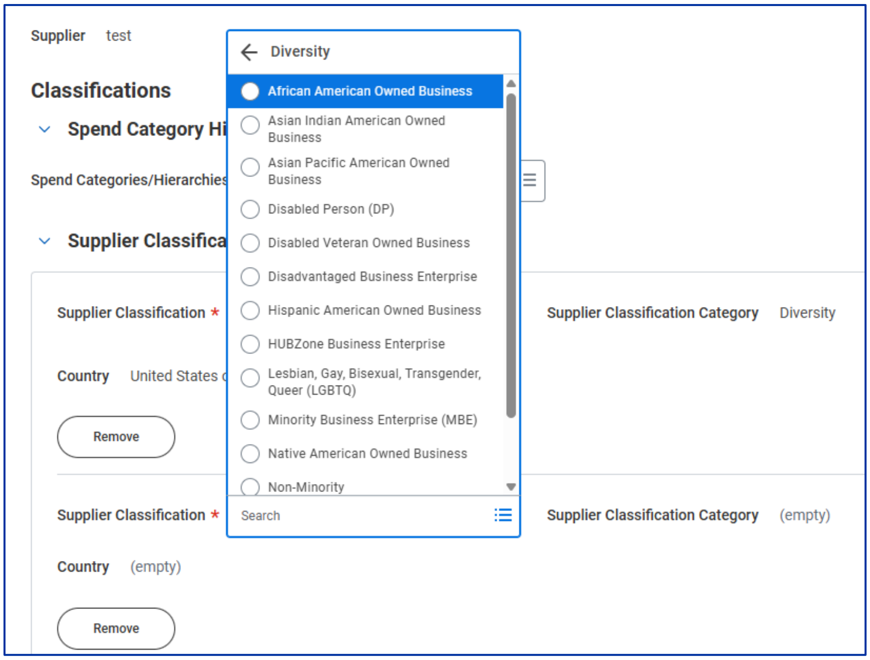
4. To select a classification, click into the **Search** field and start typing the desired classification and hit **Enter** on your keyboard or select **Supplier Classifications by Category**



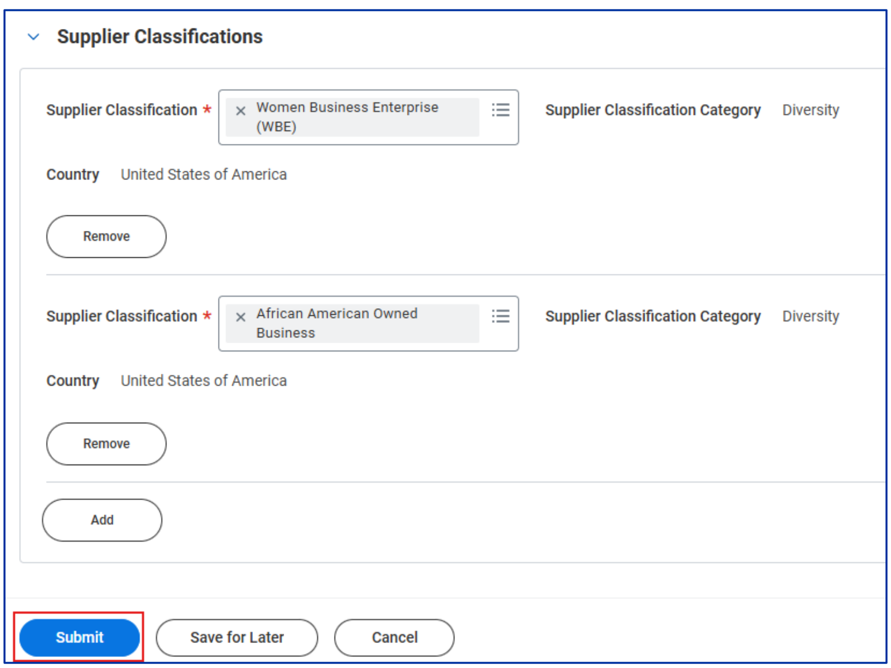
5. Select **Diversity**



6. Choose your classification. Please note, GVSU does allow self-certification, but if you would like to upload your certificates, please do so using the **Manage Attachments** option.

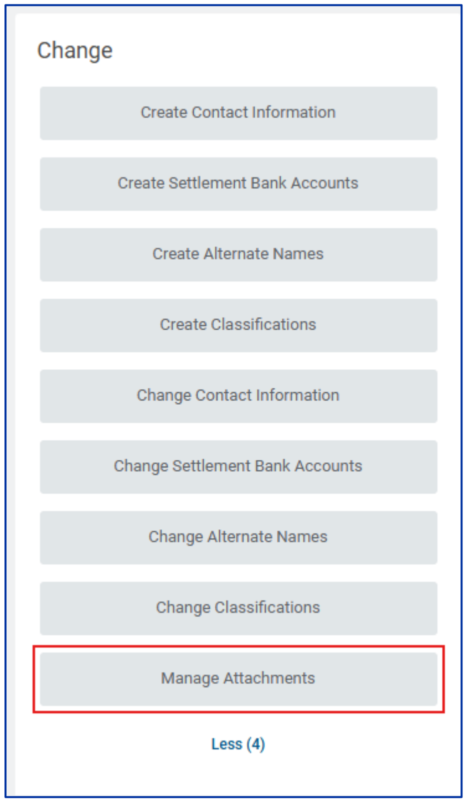


7. You can continue adding classifications by clicking **Add** or once you are finished, click **Submit**.

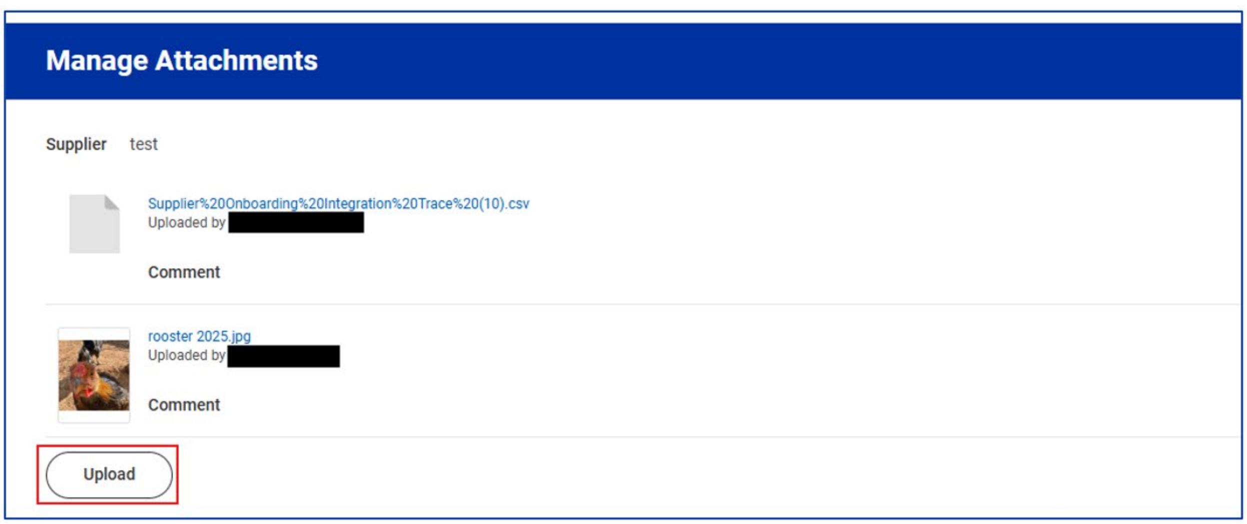


MANAGE ATTACHMENTS

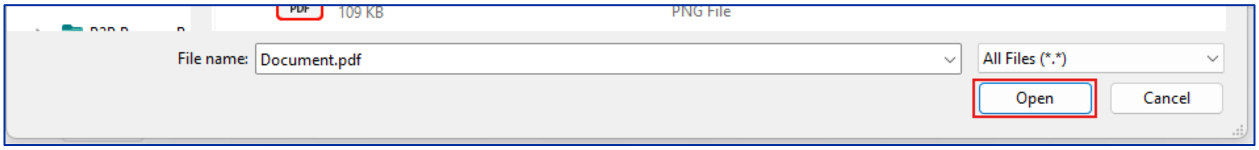
1. To add attachments to your supplier account, click **Manage Attachments**. You will not be able to remove any existing attachments, only add new ones.



2. Click **Upload**



3. Select the file from your computer and click **Open**.



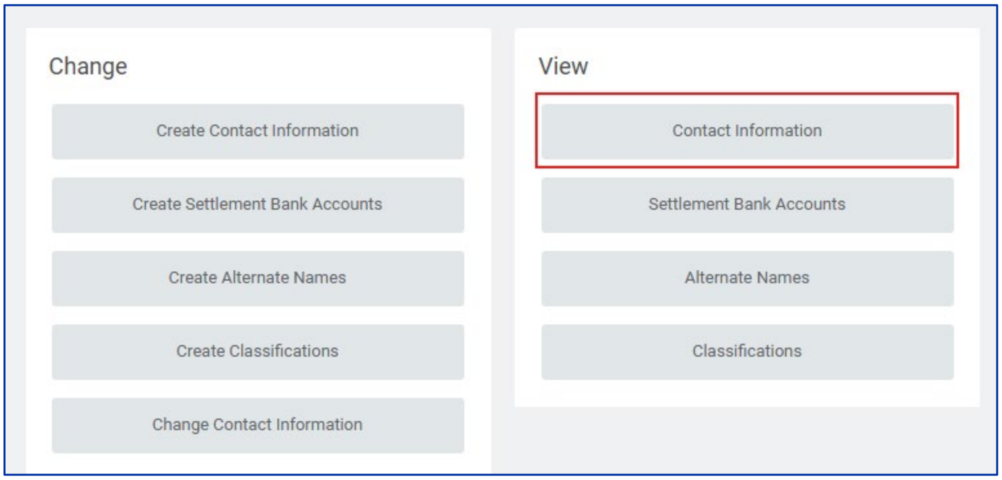
4. You can optionally add a comment about the attachment

5. Click **Upload** to add more attachments and then **OK** when you have finished adding attachments.

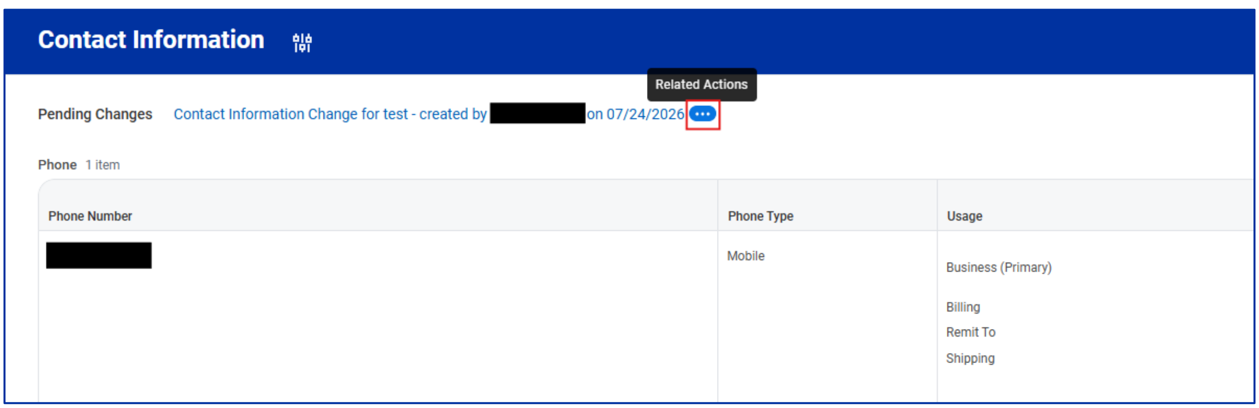
FINDING AND EDITING OR CANCELING A DRAFT CHANGE

When you start a draft change in your account, the draft will remain and prevent you from making further changes until the draft is either edited and submitted or canceled.

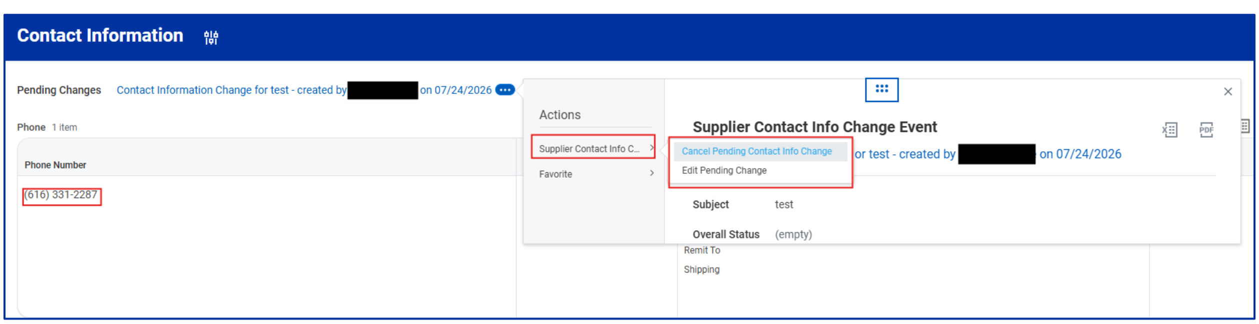
1. Click on the corresponding **View** option. For example, if you started a draft **Contact Information** change, click on **Contact Information** under **View**.



2. The pending change will appear at the top of the screen. Hover to the right of that pending change until you see the related actions (...) button appear. Click on the related actions (...)

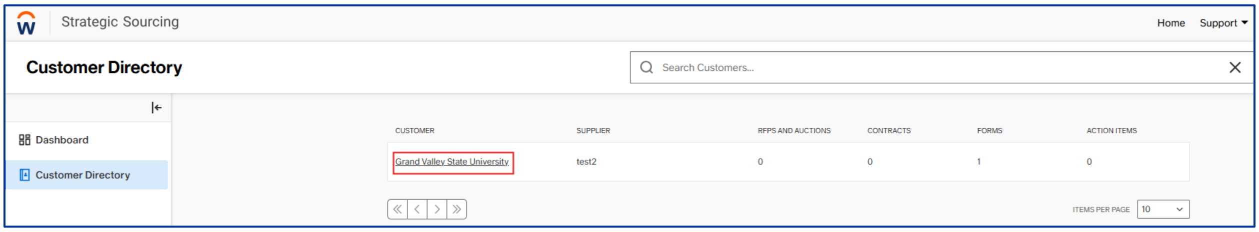


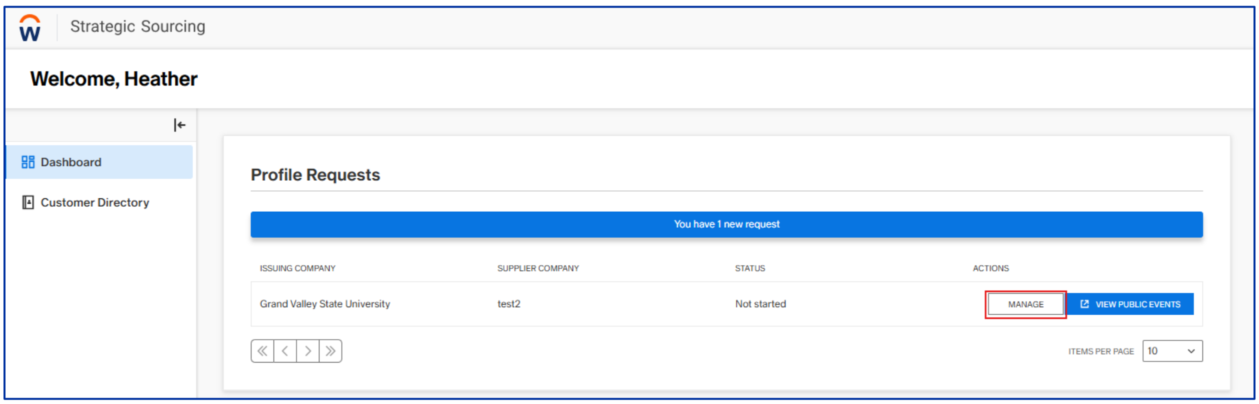
3. Hover over **Supplier Contact Info Change** and choose either **Cancel Pending Contact Info Change** or **Edit Pending Change**.



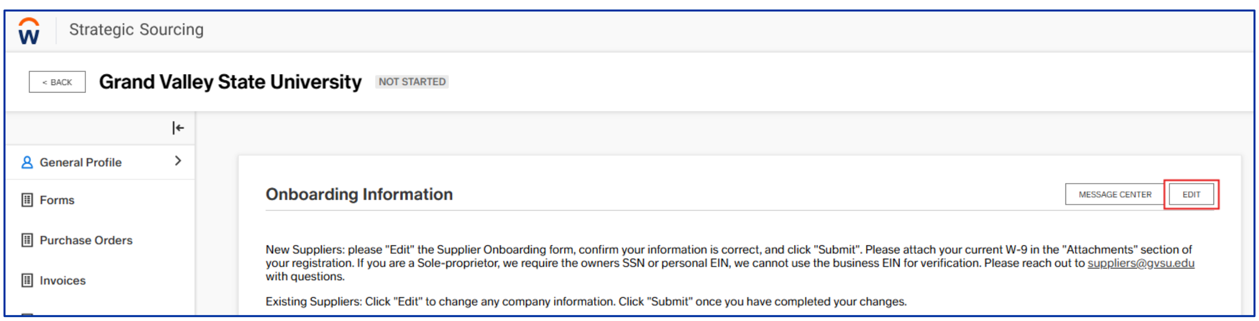
UPDATING COMPANY INFORMATION IN WORKDAY STRATEGIC SOURCING

1. After logging in through Workday Central Login, select **Grand Valley State** University from your **Customer Directory** then click **Manage** next to the Profile Request for Grand Valley State University.





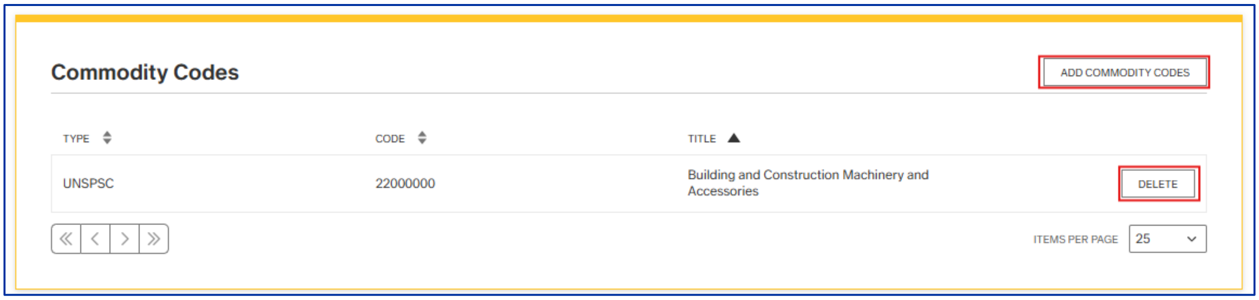
2. Click **Edit**



3. Navigate to the section with the information you want to change. Please note, fields in the Supplier Information section are not able to be changed. Please reach out to suppliers@gvsu.edu if you have any changes that need to be made in this section.

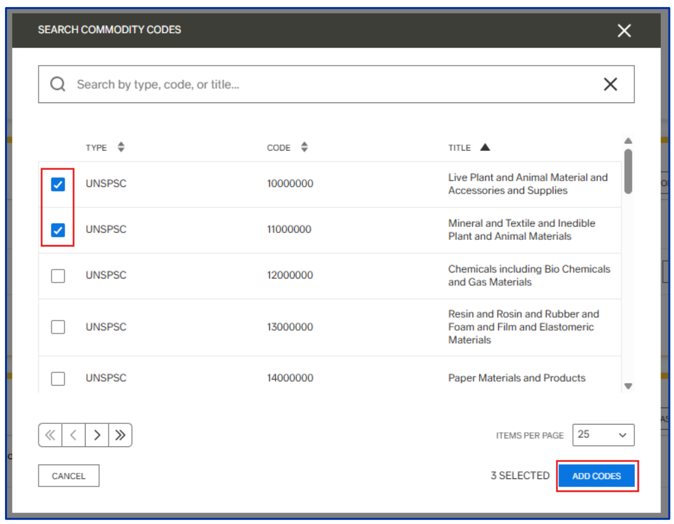
UPDATING COMMODITY CODES

1. In the **Commodity Codes** section, you can delete any existing commodity codes by clicking **DELETE** or add new ones by clicking **ADD COMMODITY CODES**.



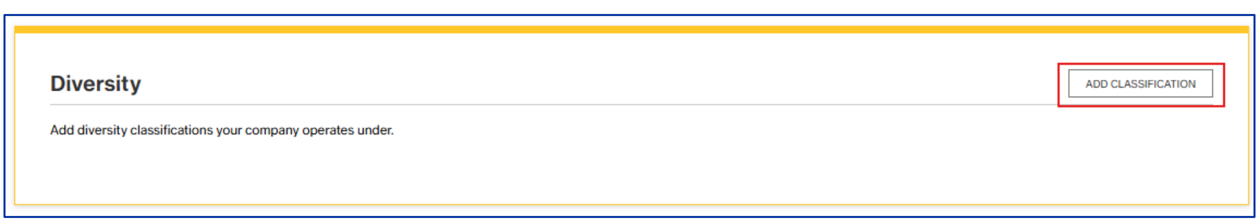
Selecting commodity codes here allows you to be alerted via email when GVSU posts an RFP using your selected commodity codes. They are not required but are highly encouraged to ensure you're being notified of relevant RFP's.

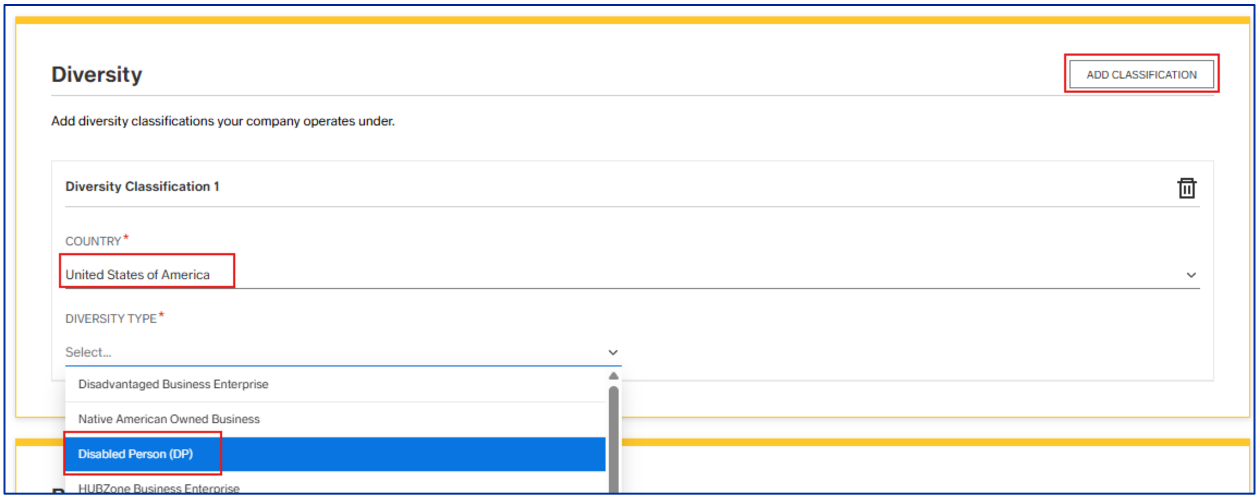
2. When adding a new commodity code, you can search by keyword and select as many as you want. When you're finished selecting commodity codes, click **ADD CODES**.



UPDATING DIVERSITY CLASSIFICATIONS

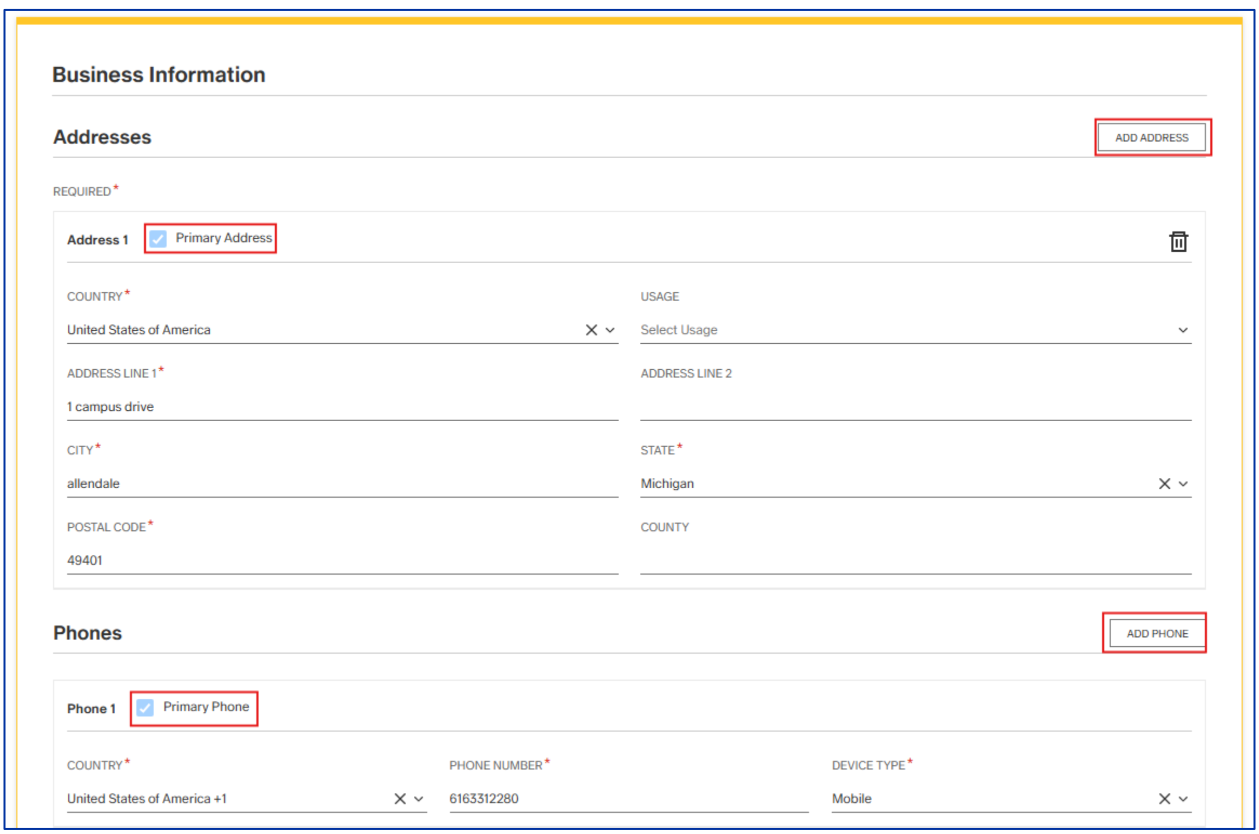
1. Navigate to the Diversity section. Click **Add Classification** to begin. Select **United States of** America for the country and then select the classification from the drop down menu. Click **Add Classification** again to add another classification. GVSU does allow suppliers to self-certify, however if you would like to upload a certificate, please do so in the **Attachments** section.





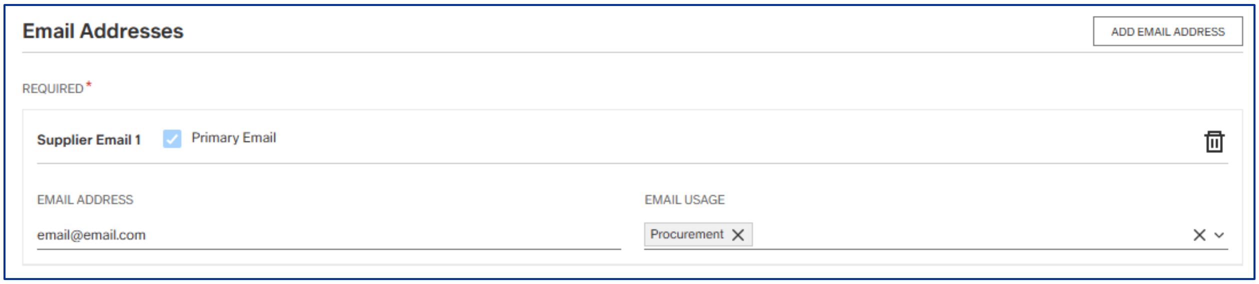
UPDATING BUSINESS INFORMATION

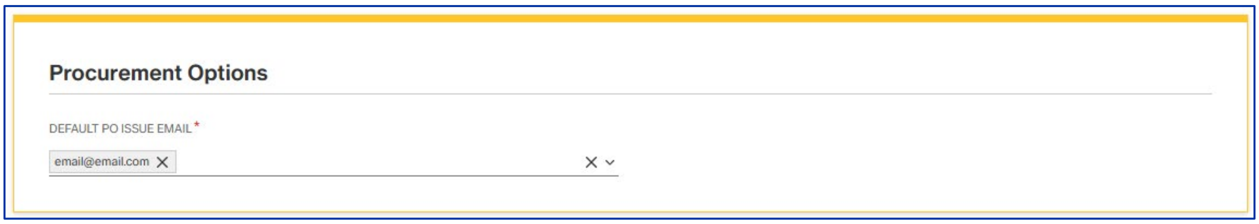
1. The **Business Information** section allows you to make updates to addresses, phone numbers, email addresses and tax information. You can edit any of the available fields or click **ADD** to add another address, phone number, email or tax ID. One address, phone number, email address and tax ID is required and one must be marked as **Primary**. *Please do not **Delete** any existing information. Instead, please add new information and mark that new information as primary.*



UPDATING PROCUREMENT OPTIONS

If you would like to receive purchase orders via email, select your default PO issue email address from the drop down. Please note, in order for an email to be available to select here, it must first be added as an email address in the previous **Business Information** section with a **Procurement** email usage (this can also be done with multiple email addresses)





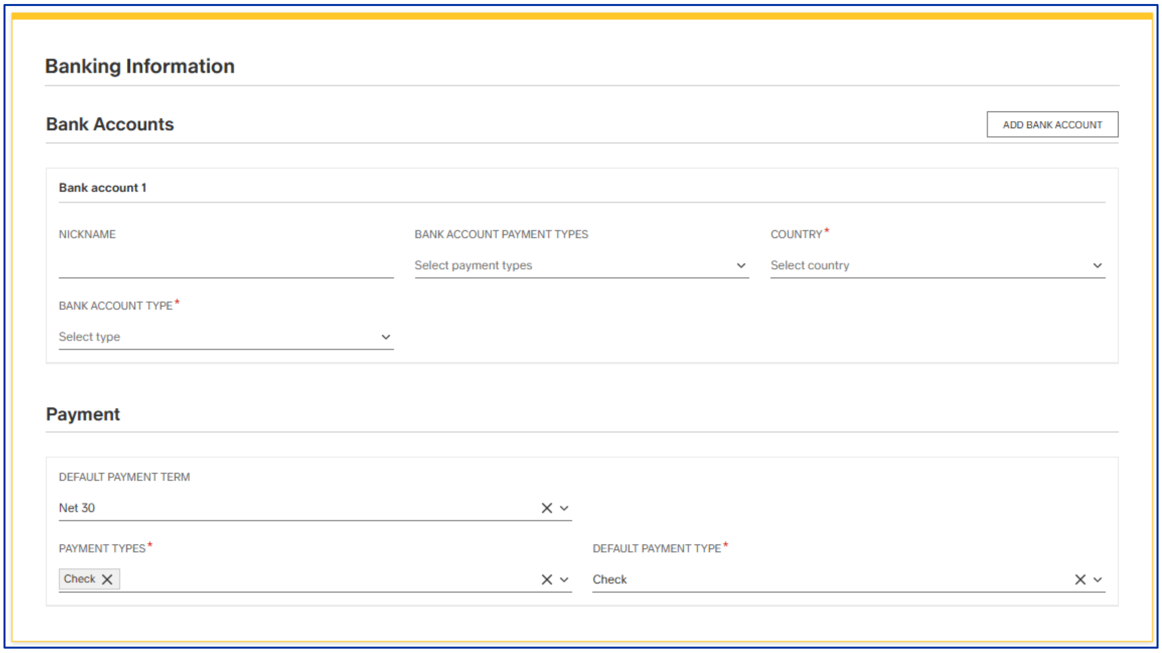
UPDATING BANKING INFORMATION

If you would like to sign up for Direct Deposit, enter your banking information in this next section. **Please include a banking document attachment** (bank statement, voided check, bank letter) if you are signing up for or changing Direct Deposit/EFT.

You can skip the banking information fields if you prefer to be paid via check.

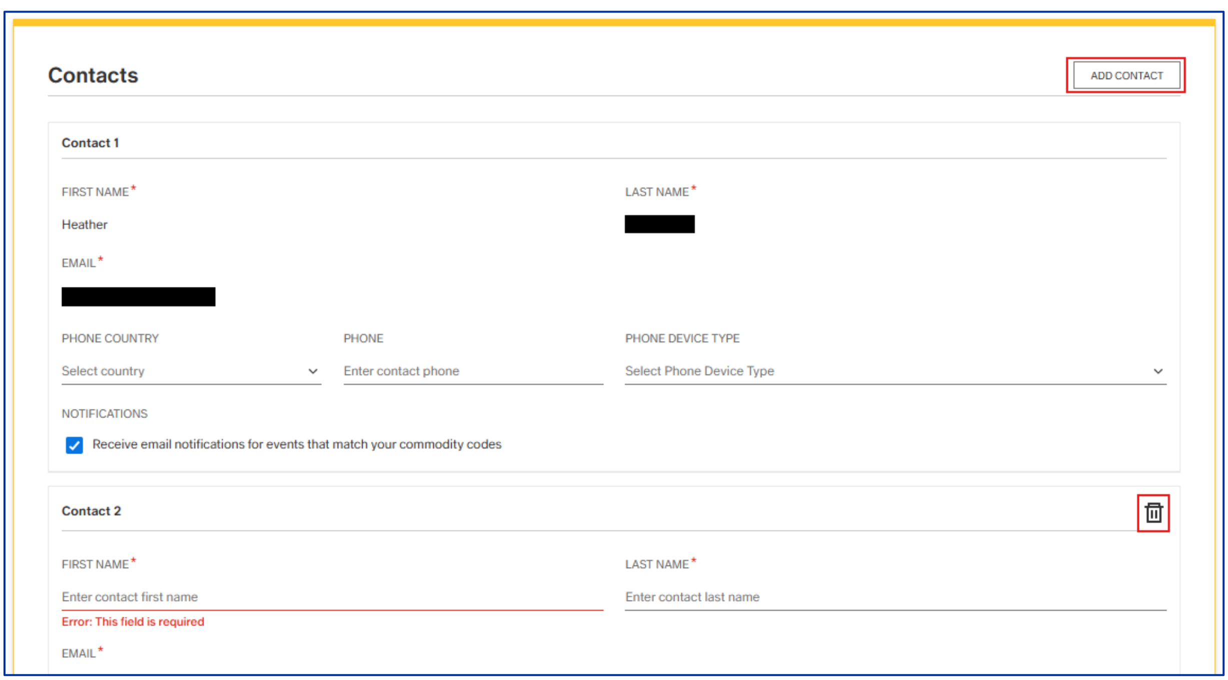
In the **PAYMENT** subsection, select your accepted payment types. **Please select either EFT, Check or both.** After selecting your payment types, another field will appear to select your default payment type. If you prefer to be paid via check, this is where you can indicate that.

You can also select your payment terms. Please note, as of January 1, 2024, GVSU has transitioned to a flat payment term with all of our suppliers to Net 30 days. If you have already negotiated different payment terms, please submit a copy of that agreement to suppliers@gvsu.edu



UPDATING CONTACTS

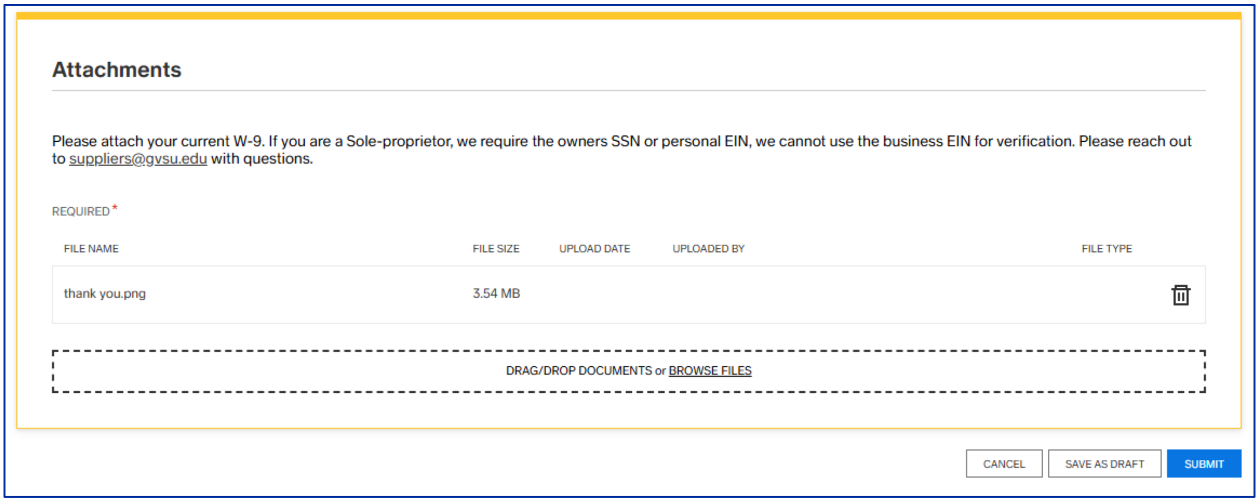
1. The **Contacts** section allows you to manage access to your company's account. You can add a new contact by clicking **ADD CONTACT** and you can delete existing contacts by clicking the trash can icon. Added contacts will receive an email notification to set up their account under your company in WSS. You can also choose whether or not each contact receives email notifications for events (RFP's) that match your selected commodity codes. We recommend that at least one company contact receives these email notifications.



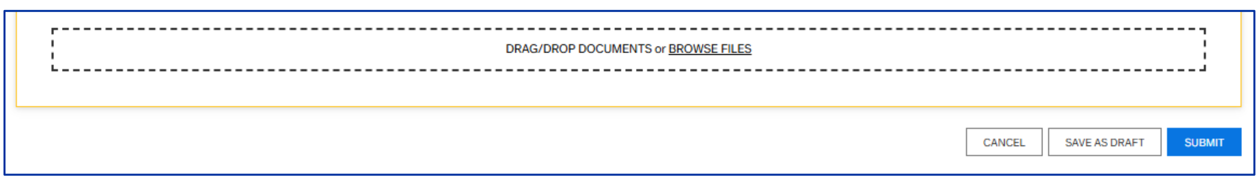
Please take the time to review your list of contacts carefully. These individuals will have access to be able to update your company information, including payment details and banking information. GVSU recommends reviewing this list regularly to ensure the contacts are accurate.

UPDATING ATTACHMENTS

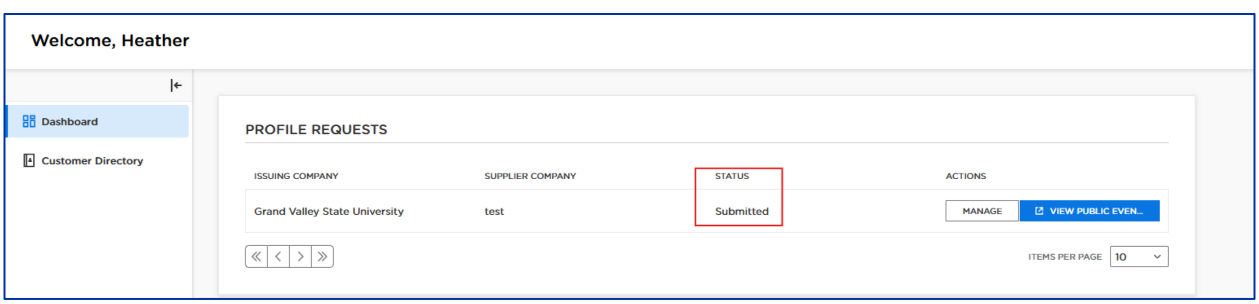
1. You can update your company's attachments by navigating to the **Attachments** section. There, you can drag and drop your attachments or browse files on your computer to add them.



When you have finished making your changes, click **Submit** at the bottom of the screen to submit your information to GVSU. Your information will be reviewed and validated before being approved. If the GVSU Supplier Administrator has any questions, you will be notified via email. If you have any questions, please email us at suppliers@gvsu.edu or use the **MESSAGE CENTER** button at the top of the screen.



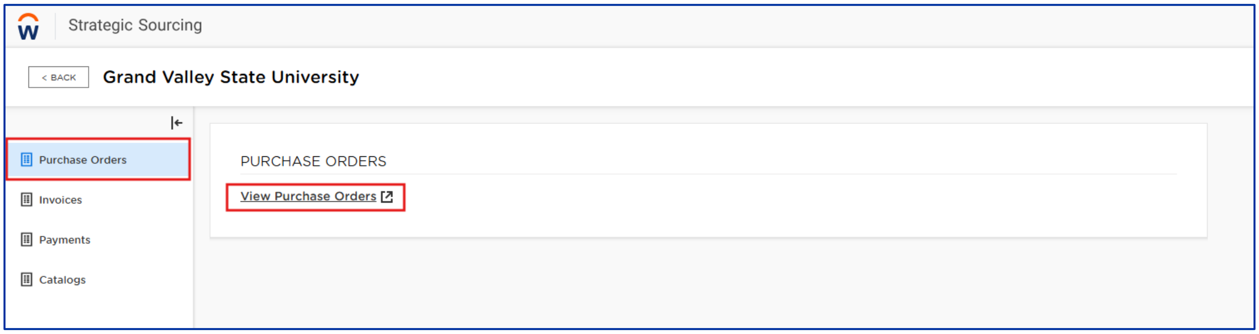
The status of your profile request will change to **Submitted** while GVSU reviews the changes. You will receive an email notification when your profile updates have been approved.



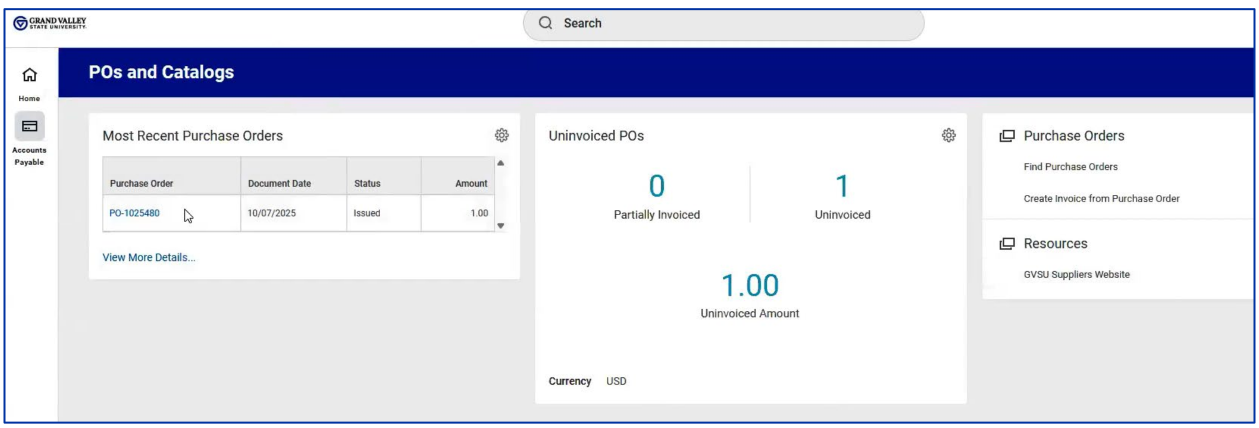
PURCHASE ORDERS

GVSU's Workday Unified Supplier Portal allows you to log in and view your company's purchase orders.

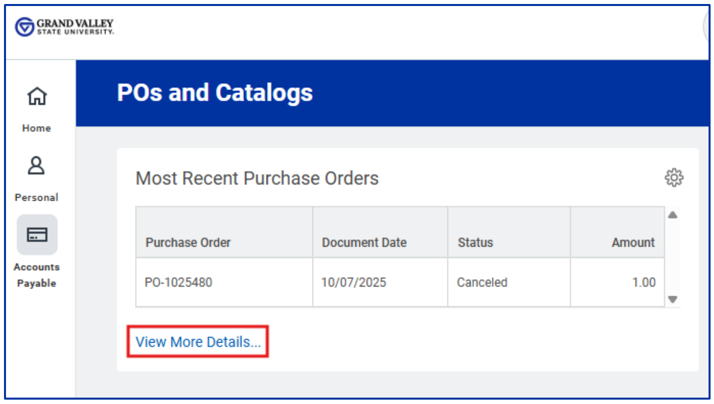
1. After logging into Workday, you'll see tabs on the left side of your screen. Select **Purchase Orders** and then **View Purchase Orders**.

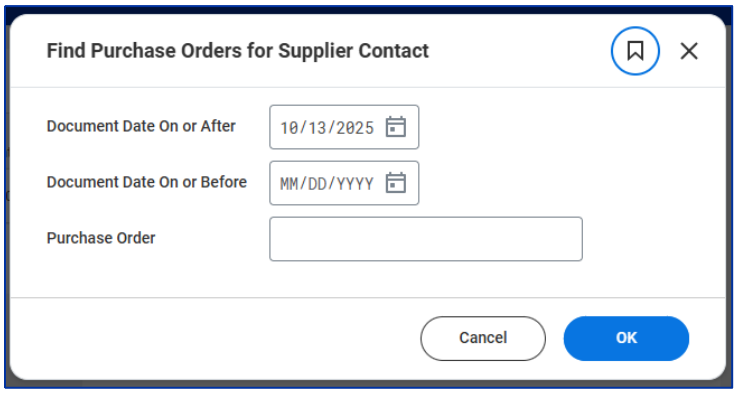


2. You'll then be brought to your POs and Catalogs dashboard. The **Most Recent Purchase Orders** section is where you can find your recent purchase orders. This will include PO's that are open and available for invoicing as well as closed PO's. The **Uninvoiced POs** section will give information about which PO's are open with a remaining balance that is available to be invoiced. *Please note, the uninvoiced amount will only reflect paid invoices, if you have an invoice that is in progress or approved but not yet paid, the uninvoiced amount displayed here will not reflect that*. The section on the right side of the screen shows tasks and resources related to purchase orders.



3. Clicking **View More Details** allows you to search for purchase orders by document date or purchase order number.





PURCHASE ORDER STATUS

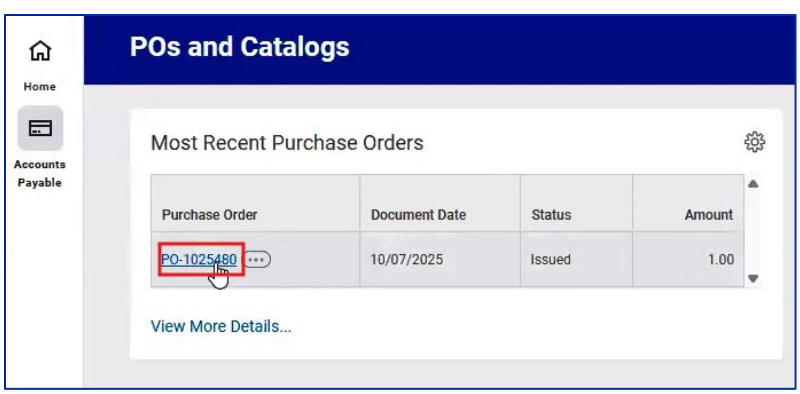
When viewing your list of purchase orders from GVSU, the PO will have one of the following statuses:

Status	Purpose
Closed	The purchase order is closed and is not available for invoicing.
Issued	The purchase order is open and available for invoicing.

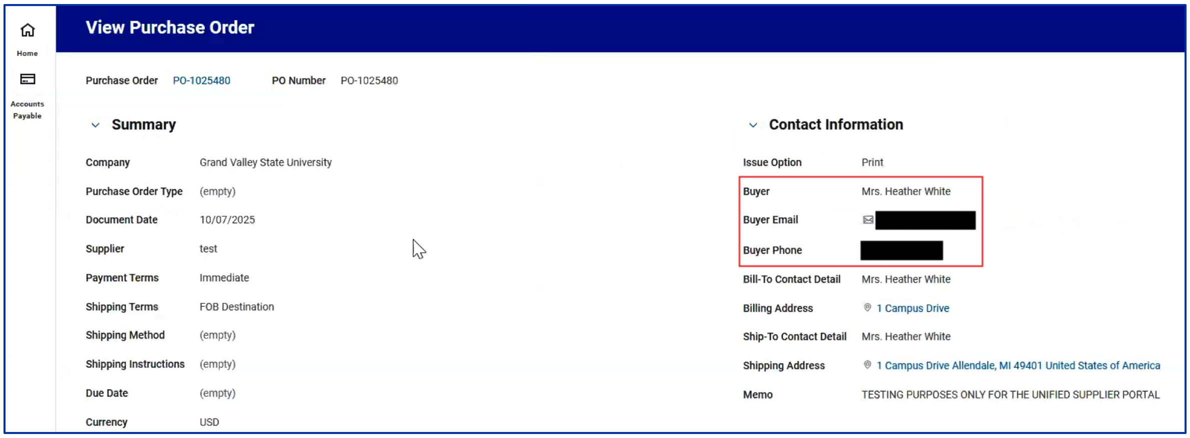
If you have any questions about your purchase order, please use the contact information listed on the purchase order or contact our Procurement Services department at purchasing@gvsu.edu.

VIEWING PURCHASE ORDERS

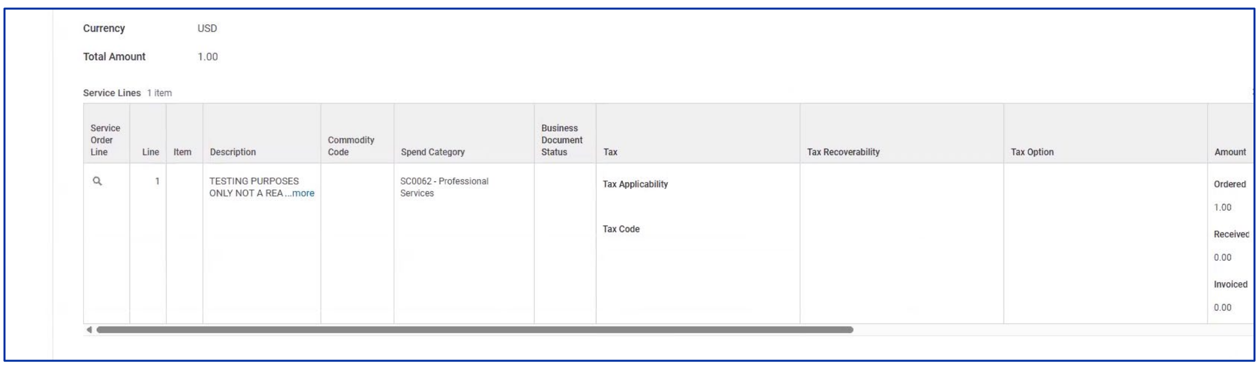
1. To view a purchase order, click on the PO number.



2. You can then view the PO information, including the Buyer name and email that you can contact with questions about the order.

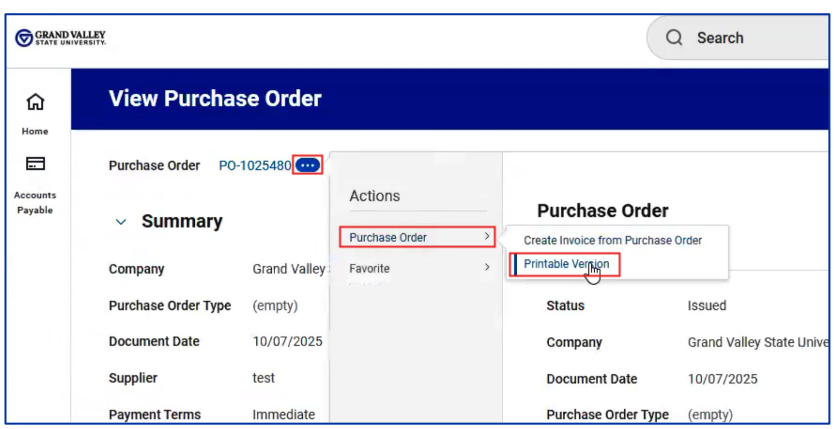


3. Scrolling down to view the line items will give more information about the specific goods or services on the order.

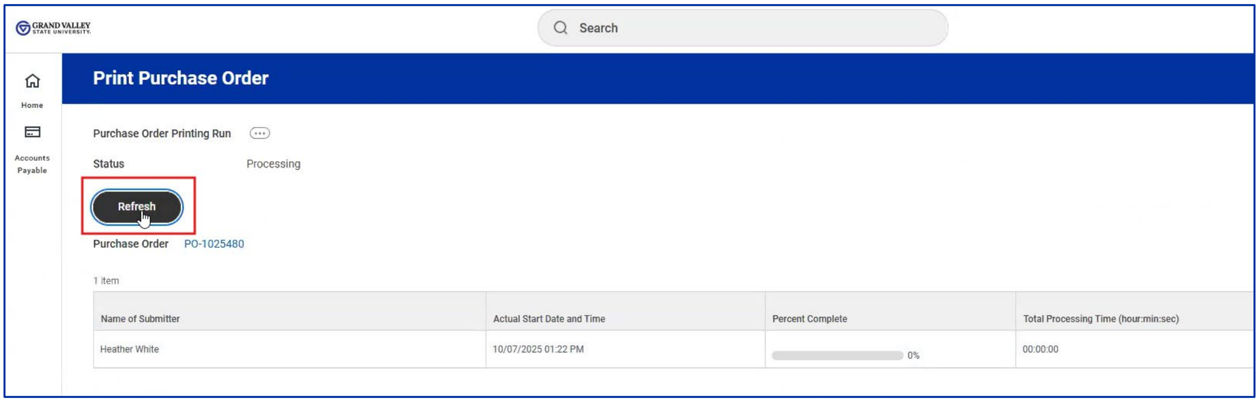


VIEWING THE PRINTABLE VERSION OF A PURCHASE ORDER

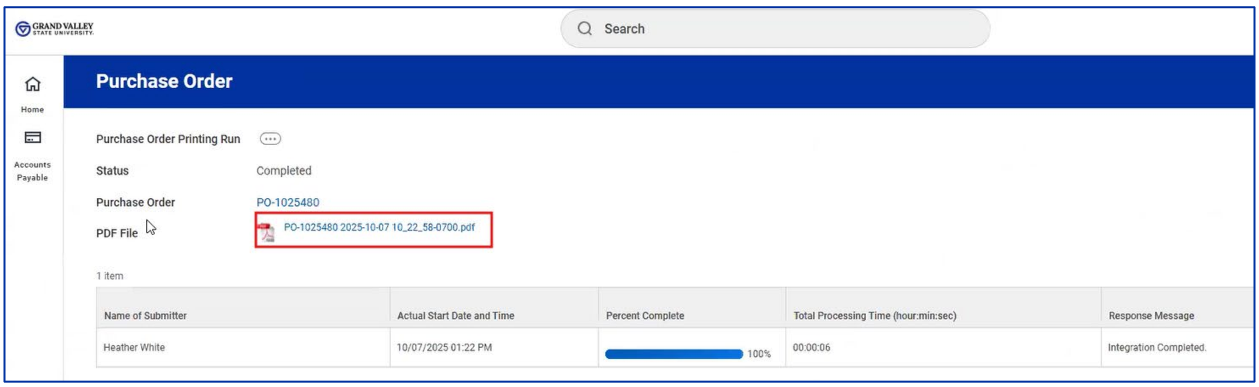
1. If you would like to view and download the PDF version of this PO, you can click the related actions (**...**) next to the PO number, hover over **Purchase Order** and click **Printable Version**. Click **OK**.



2. Click **Refresh** until the percent complete shows 100%.



3. Click on the PDF file link that appears.

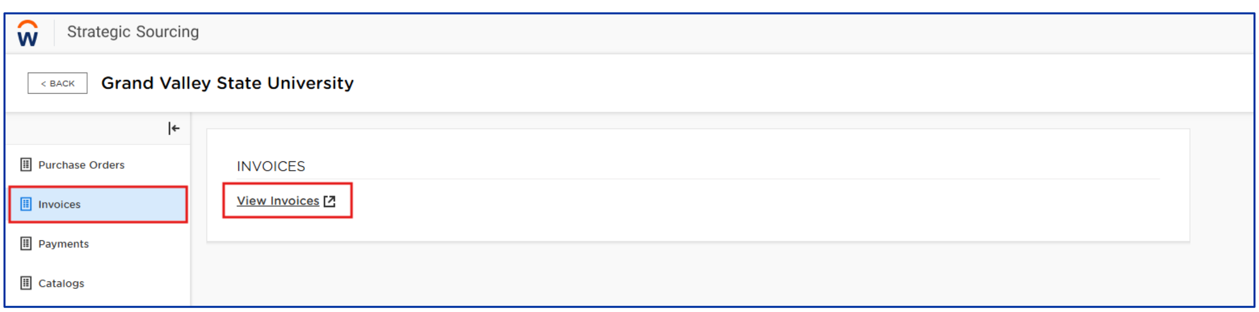


4. You can now view and download the printable version of the purchase order.

INVOICES & PAYMENTS

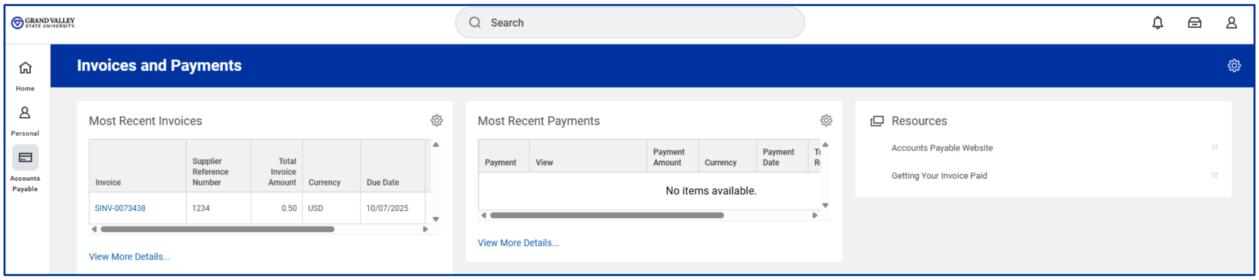
GVSU's Workday Unified Supplier Portal allows you to submit and view invoices as well as check the status of payments issued to you by GVSU.

1. After logging in, select the **Invoices** tab and click **View Invoices**.

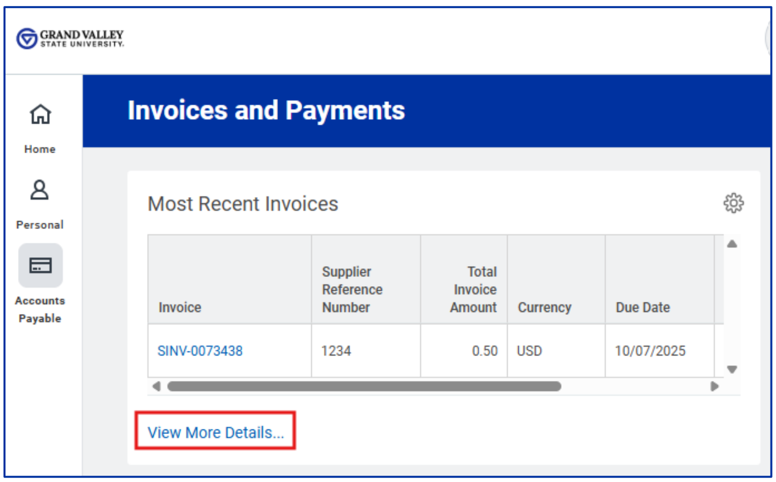


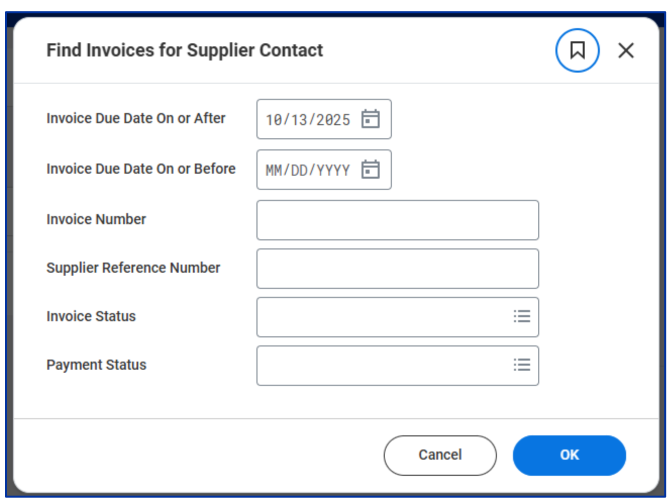
2. In the new tab that appears, you'll see different sections on your **Invoices and Payments** dashboard. **Most Recent Invoices** will show a list of your recent invoices that have been received by

GVSU. **Most Recent Payments** will show a list of recent payments issued to you by GVSU. The section on the right side of the screen shows a list of resources available.

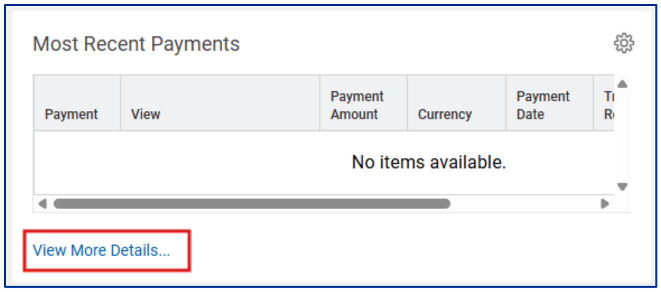


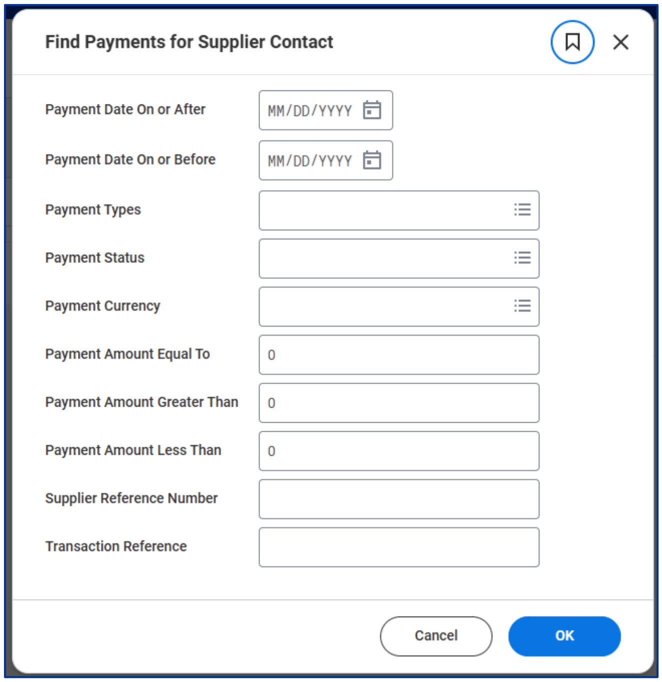
3. Clicking **View More Details** under **Most Recent Invoices** allows you to search for your company's invoices by due date, invoice number, supplier reference number, invoice status or payment status.





4. Clicking **View More Details** under **Most Recent Payments** allows you to search for payments by payment due date, payment type, payment status, payment currency, payment amount, supplier reference number or transaction reference.





INVOICE STATUSES

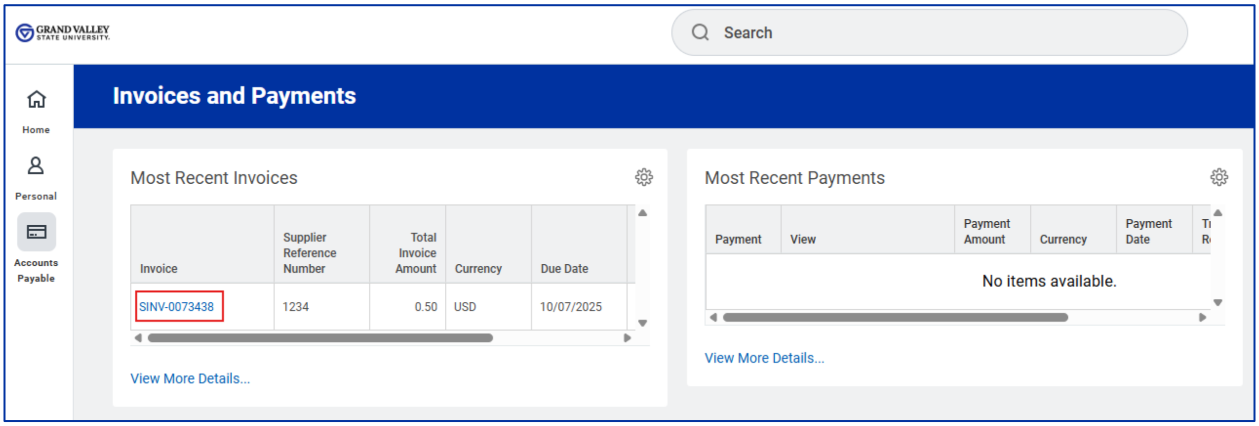
When viewing your list of invoices submitted to GVSU, the invoice will have one of the following statuses:

Status	Purpose
In-Progress	The invoice has been submitted to GVSU and is going through an internal approval process for payment.
Approved	The invoice has been approved for payment
Canceled	The invoice has been canceled by the Accounts Payable team for one of the following reasons: - Not an invoice: something other than an invoice was attached - Other: Contact Accounts Payable apassist@gvsu.edu for assistance - Paid by Credit Card: invoice was paid by credit card - Void: payment is no longer needed (AP received communication to void this invoice)

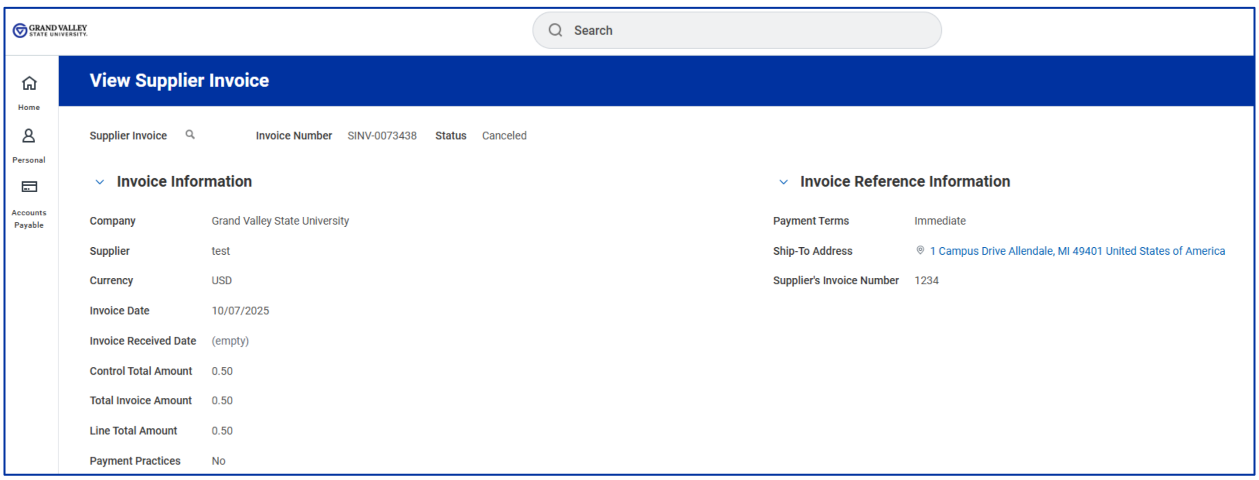
If you have any questions about your invoice, please contact our Accounts Payable department at apassist@gvsu.edu.

VIEWING INVOICES

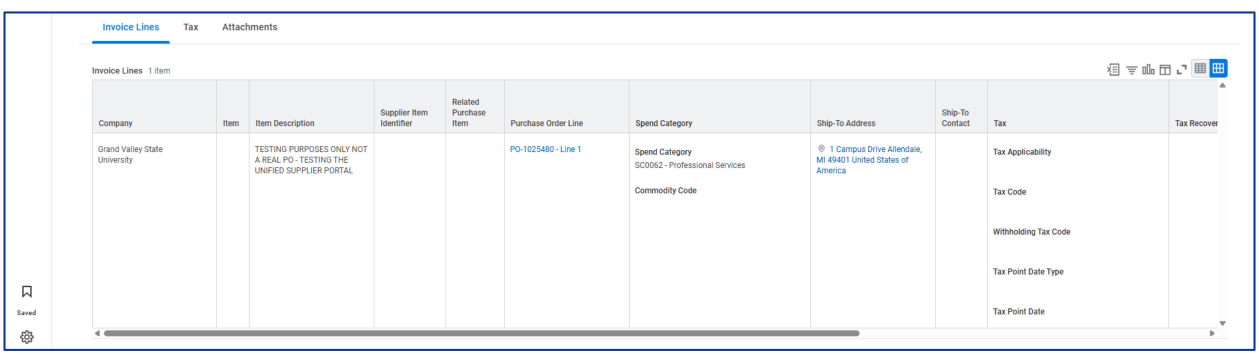
1. To view an invoice, click on the invoice number



2. You can then view the details of your invoice, including the status at the top of the page.

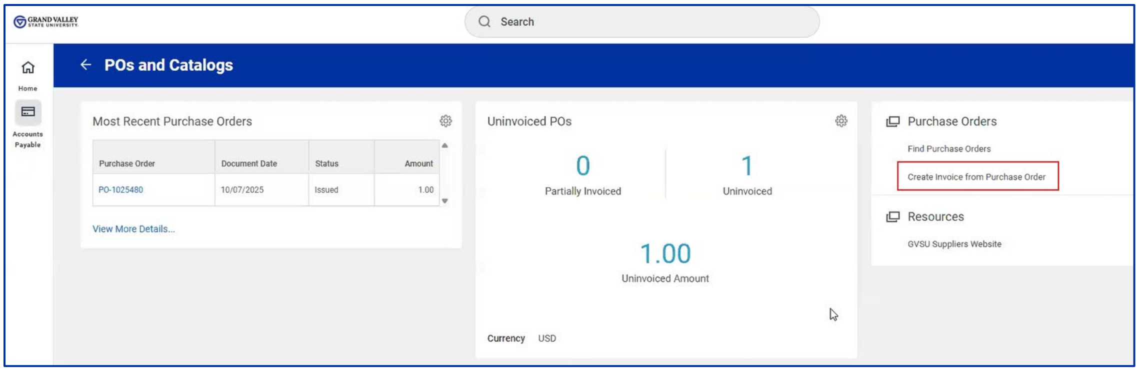


3. Scrolling down to the line items section will give further details about the line items on the invoice. You can also use the **Attachments** tab to view invoice attachments.

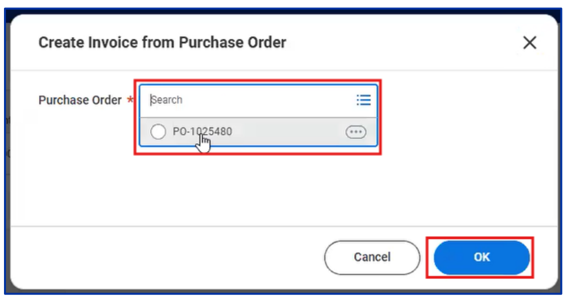


SUBMITTING INVOICES

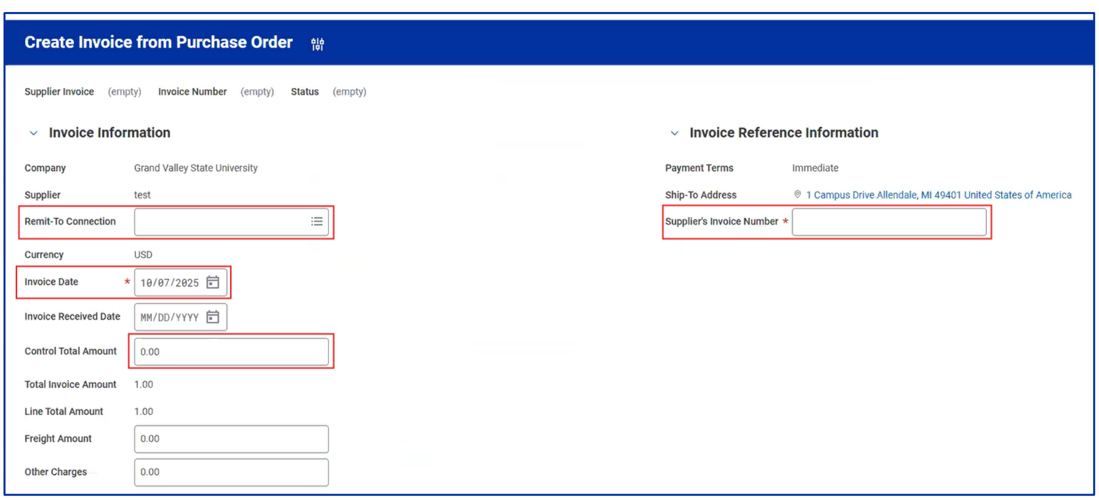
1. If you have an open purchase order with an uninvoiced balance, you can submit an invoice directly in your Workday supplier portal. On the **POs and Catalogs** dashboard, select **Create Invoice from Purchase Order**. This can also be accessed by using the related actions (**...**) next to the purchase order number, hovering over **Purchase Order** and selecting **Create Invoice from Purchase Order.**



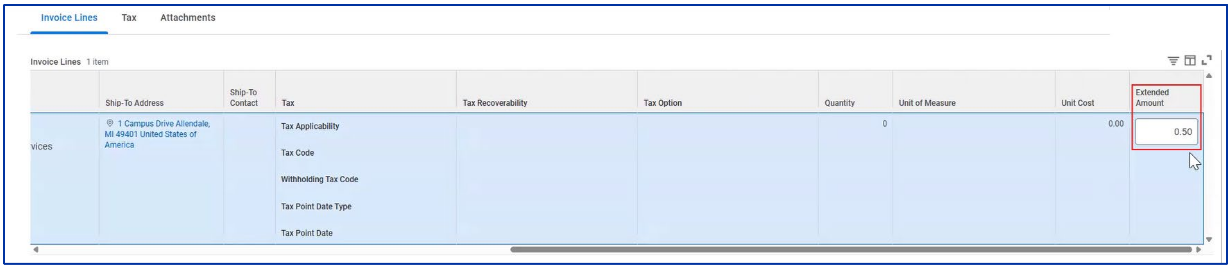
2. Your purchase orders with an uninvoiced amount will be available for you to select from on the following screen. Select the appropriate purchase order you would like to invoice and click **OK**.



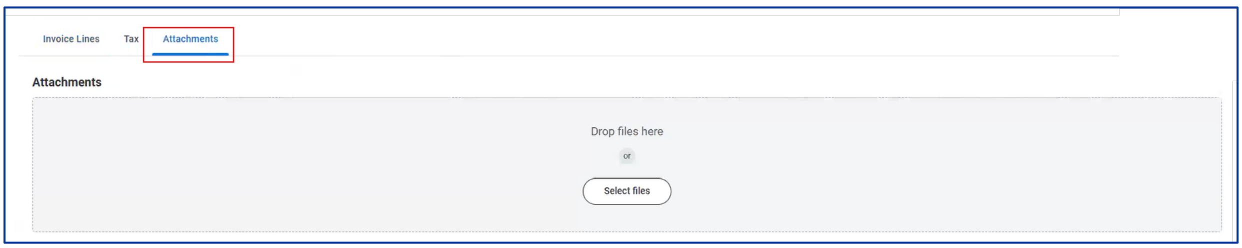
3. Begin filling in the required fields. The **Remit-To Connection** is optional, but we ask that you select the appropriate option for payment remittance here if it is available. The **Control Total Amount** is the total amount of your invoice. The **Supplier's Invoice Number** is your invoice number. Please update the **Invoice Date** if applicable (it will default to today's date).



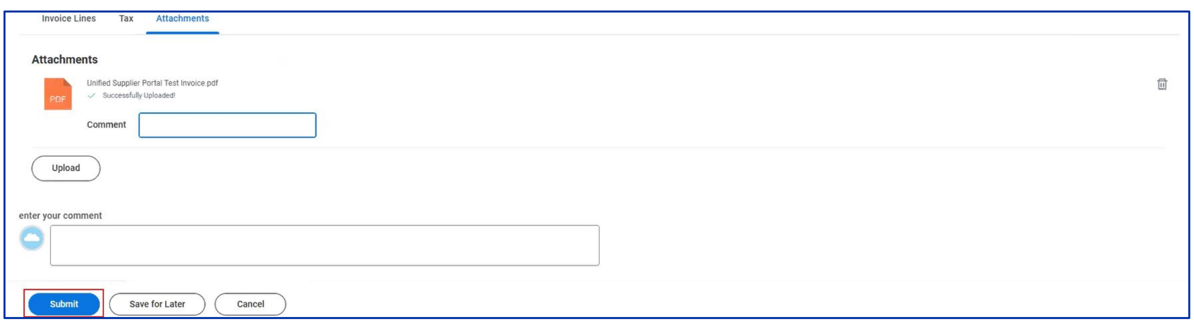
4. Scroll down to the line items section and then scroll all the way to the right to see the extended amount for that line. The sum of the extended amounts on the lines must equal the control total amount that was entered at the top of the page. *Please note, you will not be able to submit an invoice for a larger balance than what remains on the purchase order. If you need to submit an invoice that exceeds the remaining balance, use the contact information listed on the purchase order or contact Procurement Services at purchasing@gvsu.edu for assistance.*



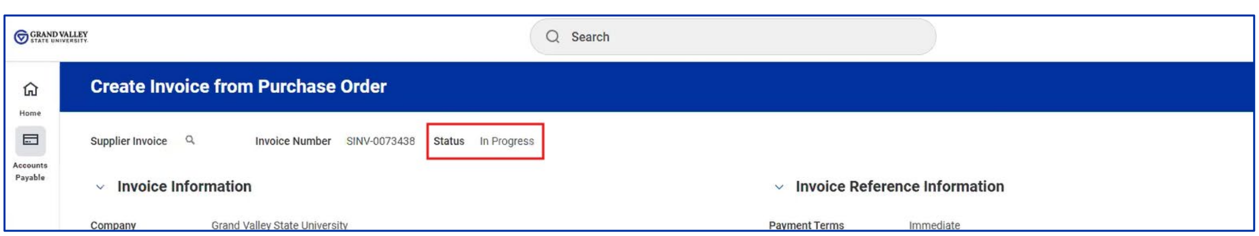
5. The **Attachments** tab is used to upload your invoice document.



6. After uploading your attachment, you can click **Submit** to submit the invoice to GVSU's Accounts Payable team for payment.



7. After submitting your invoice, you will see a status of **In Progress** while the invoice moves through internal GVSU approvals. Please note, invoices cannot be edited after they are submitted. If you need to make any changes, you will need to contact apassist@gvsu.edu.



The invoice status and payment status will also be available on your **Invoices and Payments** dashboard under the **Most Recent Invoices** section.