# Workday Unified Supplier Portal (USP)

**Supplier Reference Guide**

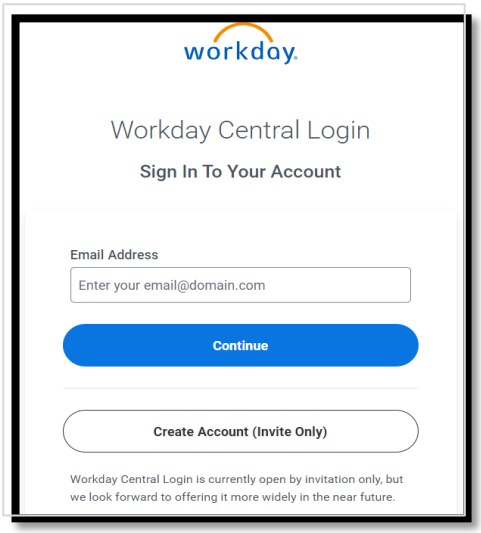
Workday USP is free, there is no cost to suppliers for creating an account on this platform. Once a supplier profile has been set up, the Workday USP enables suppliers to access their procurement information and action items (including sourcing events, onboarding forms, purchase orders, invoices & payments) across multiple customers, all from one centralized log-in.

## Creating a Workday USP Account

1. Hyland will send an invitation via email from the Workday Strategic Sourcing Portal
2. Click **Sign Up and View Form** from the email
3. Complete the necessary email verifications - Create a Workday Central Login (WCL) Account
    a. Send Verification Code
    b. Login with code
    c. Create Account and Password
        i. Password Requirements: At least 8 characters that include lowercase letters, uppercase letters, numeric digits, and special characters.
4. Complete the second verification process
    a. Download and open an **authenticator** app
        i. Recommended mobile authenticator apps:
            1. Authy
            2. Duo Mobile
            3. Google Authenticator
            4. LastPass Authenticator
            5. Microsoft Authenticator
        ii. Recommended desktop authenticator apps:
            1. Authenticator
            2. 1Password
    b. Scan the QR code with your authenticator app to receive the 6-digit code
    c. Enter the 6-digit code into your authenticator app and click Connect Authenticator App
    d. Add a Mobile Number (optional) for future verification needs, or Skip this Step
5. The Workday Register New User page opens
    a. Check the box next to Accept Terms of Service
    b. Enter your information then click Save and Finish
6. The Workday Portal opens automatically to the Hyland Invite

## Returning to the USP: Signing In

Navigate to the Workday Central Login to sign into your account




## Troubleshooting

- **General Multi-Factor Authentication (MFA) Challenges** – Suppliers should take the following actions:
  - Complete all steps as outlined in the *"Creating a Workday USP Account"* above
  - Attempt login with an alternate authenticator application (sample options noted above)
  - Clear browser cache and cookies
  - Ensure the device's time zone is configured correctly
  - FAQ: Workday Central Login (WCL) Security Settings

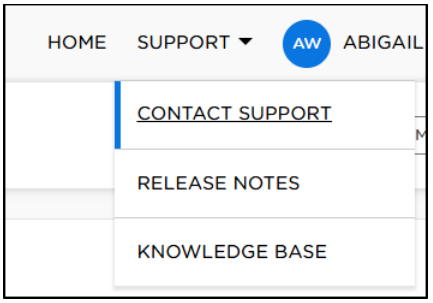
- **MFA Emails Not Received** – Suppliers should take the following actions:
  - Ensure shared email accounts are not being used for USP login
  - Check Spam / Junk email
  - Whitelist Workday domains including: Hyland@MyWorkday.com, no-reply_strategicsourcing@workday.com, workdaysupportcenter@workday.com

- **Workday and Strategic Sourcing Assistance:**
  - Supplier Sign In and Account Security
  - Password Reset for Suppliers
  - Account Recovery for Suppliers
  - FAQ: Contacting Strategic Sourcing

## Workday Support

**Option 1**: To log an issue with Workday, please open a case with the **Workday Support Team**: Select **Support** in the upper right-hand corner of the portal and select **Contact Support**.

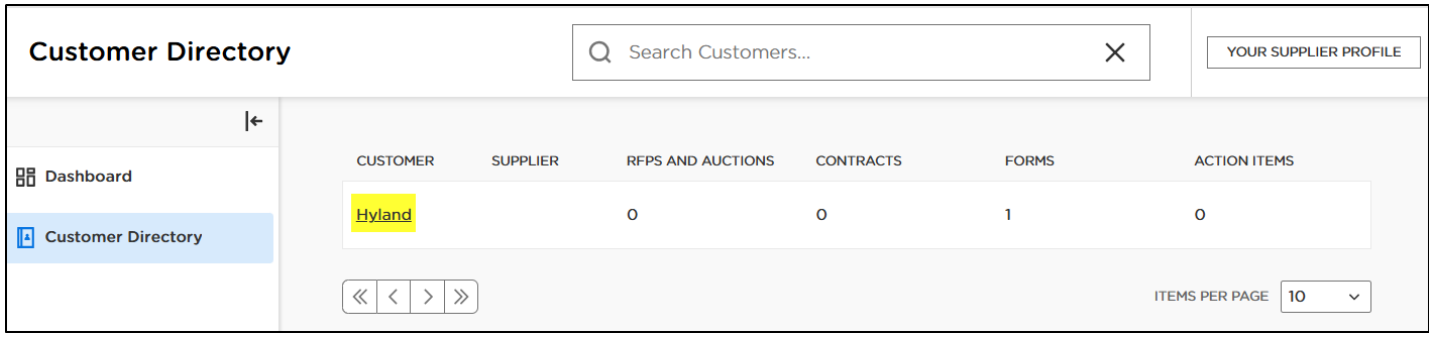
**Option 2**: Send an email directly to **ScoutSupport@workday.com**



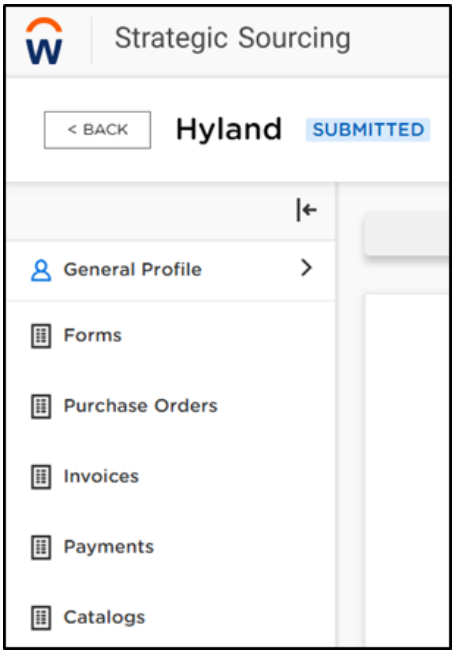
In either scenario, please include any relevant screenshots and expect a response from Workday within 48 hours. Hyland will not have visibility into your Workday support tickets.

## Navigating the Workday USP

1. Navigate to the **Customer Directory** and under Customer click on **Hyland** to access your activities with Hyland

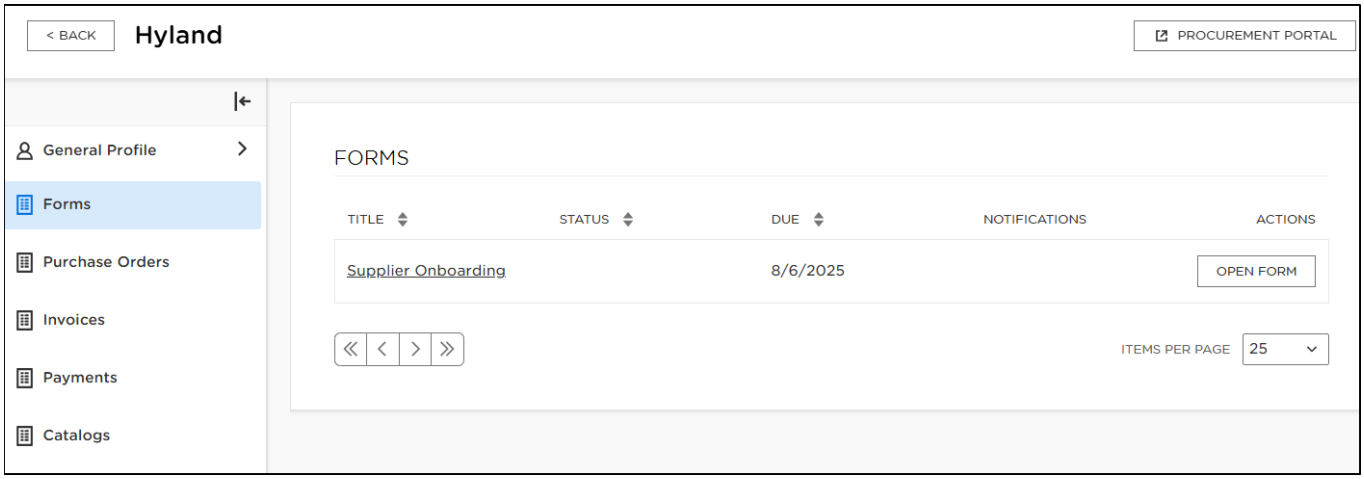



2. Use the options in the left column to navigate to the appropriate platform:
   - **Forms** – Workday Strategic Sourcing
     - You may not have this option if you were not a contact during onboarding or included on sourcing events.
     - Onboarding
     - Sourcing Events
   - **Workday Procurement** – for PO/Invoice Processing activities, contact and banking updates, and supplier support requests.
     - Purchase Orders
     - Invoices
     - Payments
     - *Catalogs – not used by Hyland*



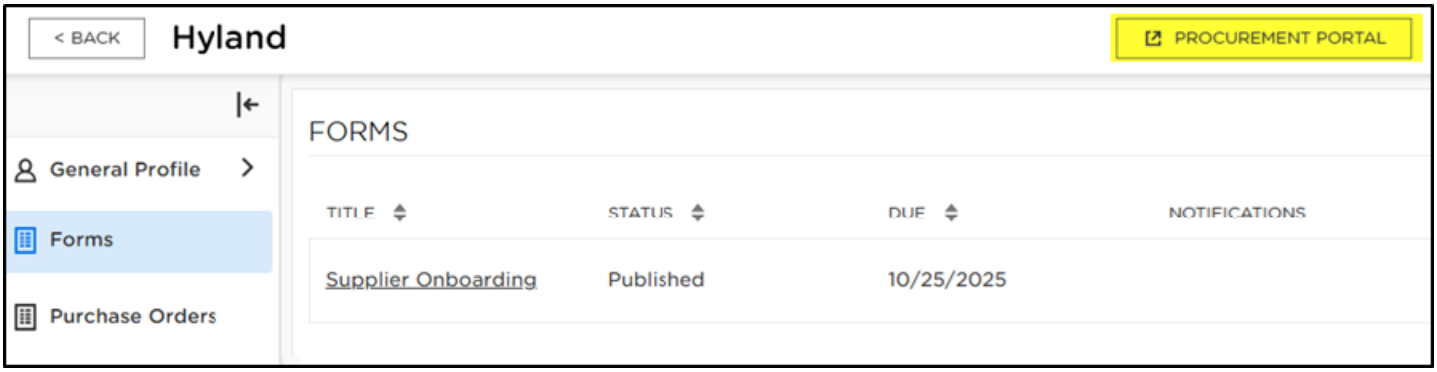
## Onboarding and Sourcing Events

1. Under Customer Name: Hyland, click on **Forms**
2. Under Actions, click **Open Form** and complete for any sourcing events and/or onboarding activities. There may be more than one form



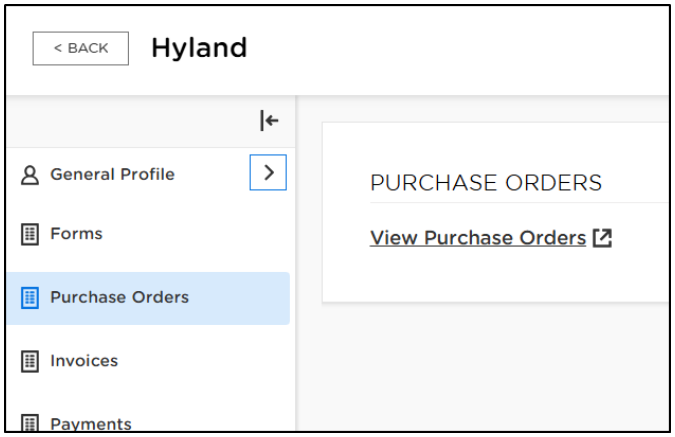

## Procurement Portal

Clicking on Purchase Orders, Invoice, Payments, or Procurement Portal will launch the Workday Procurement platform. Alternatively, the Procurement Portal can be launched from the task in the upper right-hand corner.

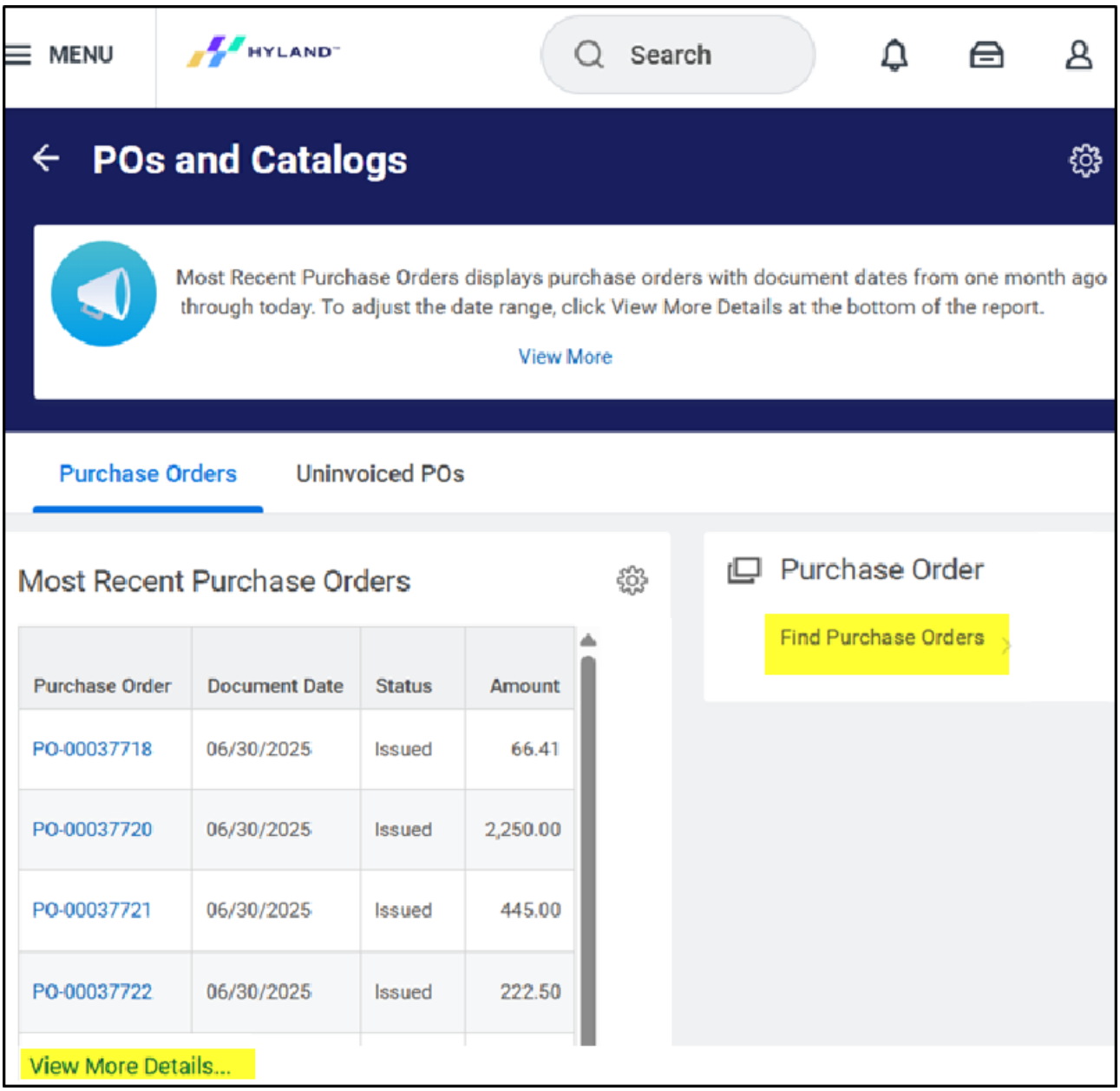



## Purchase Orders

1. Under Customer Name: Hyland, click on **Purchase Orders** > **View Purchase Orders**.



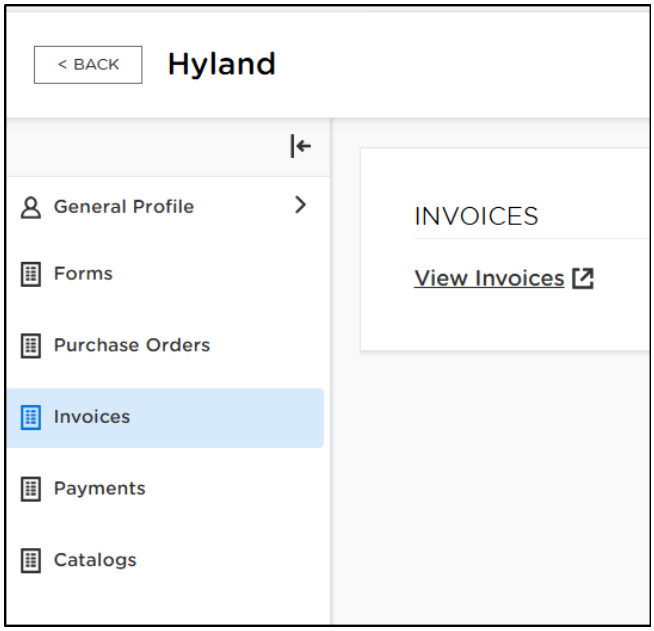
2. A new Workday Procurement tab will open on the "POs and Catalogs" dashboard. The **Most Recent Purchase Orders** displays purchase orders with document dates from one month ago through today.
   - To adjust the date range, click **View More Details** at the bottom of the report
   - **Find Purchase Orders** can also be used to find a specific purchase order



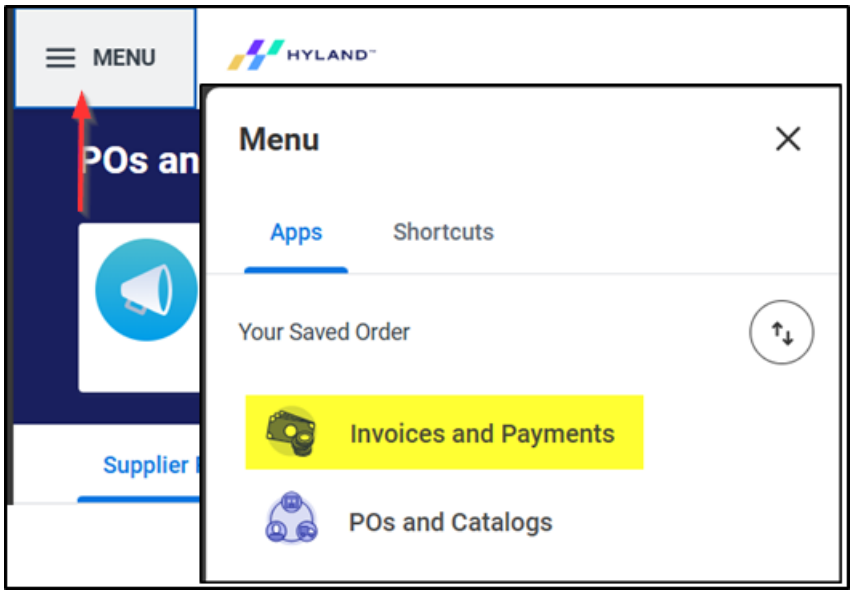

3. Under **Uninvoiced POs**, click to **View Details** (or **Export** a list of uninvoiced POs to your desktop).

## Invoices & Payments

**Option 1**: On the Workday Strategic Sourcing platform under Customer Name: Hyland, click on the **Invoices** or **Payments** tabs



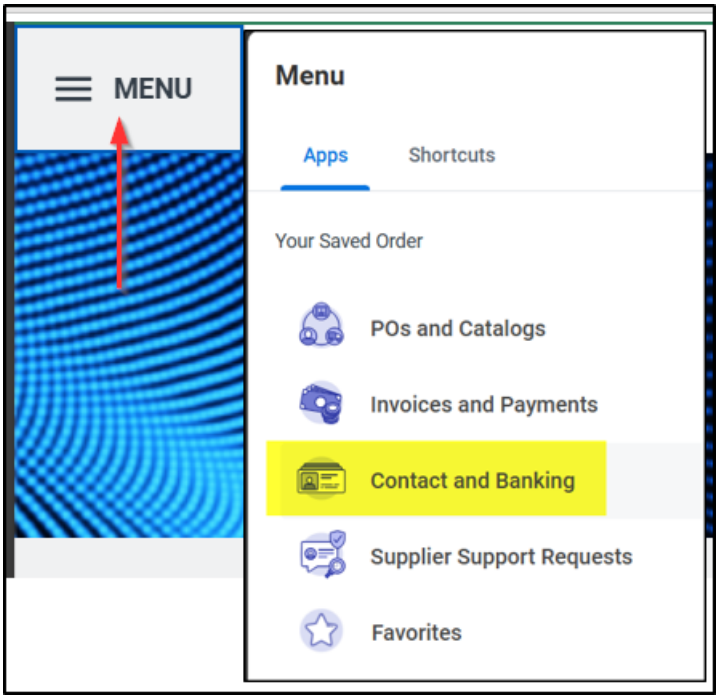

**Option 2**: If you are already in Workday Procurement, click on Menu at the top left and navigate to Invoices and Payments dashboard.

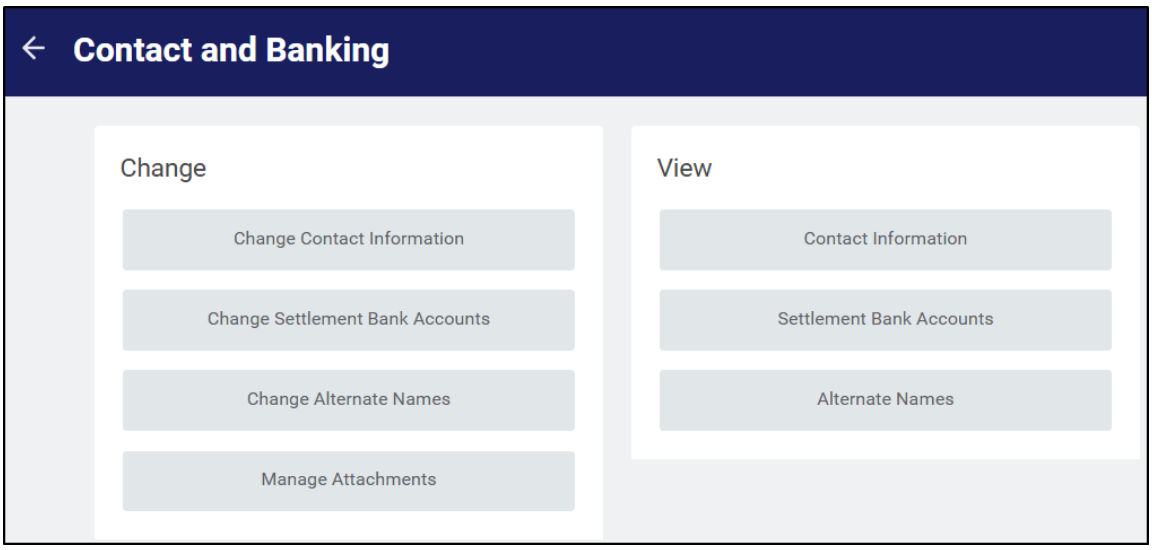



1. Browse **Most Recent Invoices and Payments** via the tabs on the dashboard
2. Note: To request cancellation of a pending invoice, please submit a Supplier Support Request and include the invoice number, reason for cancellation, and any supporting documentation. (instructions below)

## Contact and Banking

From Workday Procurement, click on Menu at the top left and navigate to Contact and Banking dashboard




Any changes made will route to Hyland Accounts Payable or Hyland Treasury for review.

The supplier contact confirms that the information updated through the portal is accurate and that they are authorized to make changes to company, contact, and banking information on behalf of their organization.

### Change Contact Information

This option can be used to update your company phone numbers, email addresses, and addresses.
IMPORTANT: If you are updating your company's **primary** address:

- And your company is located in the US and transacting business with Hyland Software, Inc. - Updated form W9 is a required attachment.
- Or your company is located outside of the US and transacting business with Hyland Software, Inc. - Updated form W8 is a required attachment.

Failure to provide the correct supporting documentation will delay updates.

Please Note

- **Only one email address per supplier will receive PO emails from Workday**. If this email recipient needs to update, please add the email address with a Usage of Procurement and add a comment stating "New email for Purchase Order Issue"
- Other users can log in to the Workday USP to view Hyland POs that have been submitted.
- If you would like **additional user(s) to access Hyland's procurement activity** in the Workday USP (POs, invoices, etc.), please submit a Supplier Support Request (instructions below)

## Change Settlement Bank Accounts

Adding a Bank Account – Required Fields

- Country
- Account Type = Checking
- Routing Transit Number
- Bank Name
- Account Number

Attach bank details for **all** accepted currencies on bank letterhead or company letterhead.

## Change Alternate Names

This is useful to provide alternate company names and their usages to Hyland. (DBA, Remit to Payee, etc.)

## Manage Attachments

Any attachments provided to Hyland will be displayed here. Simply uploading an attachment will not notify Hyland so, be sure to go through the proper modes of making changes where attachments are necessary.

## Supplier Support Request

Supplier Support Requests streamline communication with Hyland Accounts Payable for questions and updates. By providing access to the portal, we are confident that this will provide suppliers with better visibility into their procurement activities.

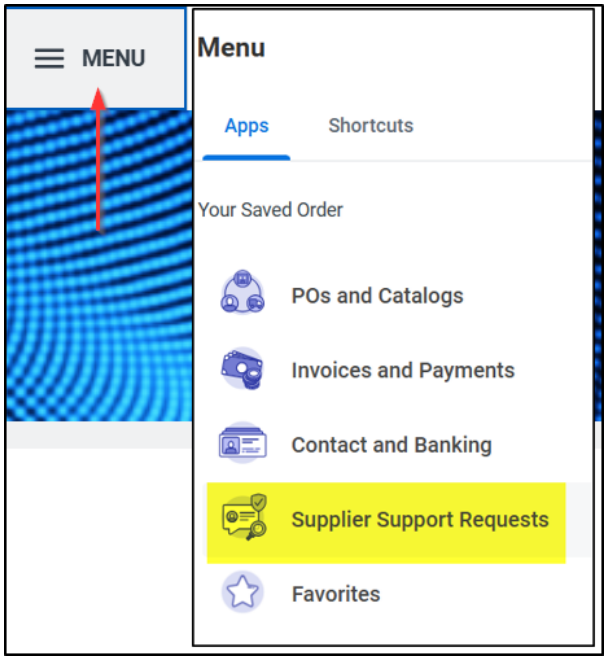
**Possible Reasons for a Supplier Support Request**

- Changes to portal access accounts
- Company name change
- Invoice cancellation
- Payment status inquiries – if unable to find through "Invoices and Payments" dashboard

A Supplier Support Request will always be needed if a supplier needs to request additional contact access to the Unified Supplier Portal to access Procurement activities.

From Workday Procurement, click on **Menu** at the top left and navigate to Supplier Support Requests dashboard

The dashboard will display Supplier Support Requests submitted by the **current user** and the **Create Request** task.



Supplier Support Requests | Completed Supplier Support Requests

## My Open Supplier Support Requests

| Request | Initiation Date | Request ID | Reason for Request | Status | Last Comment on Task |
|---|---|---|---|---|---|
| | 10/21/2025 11:43:09.690 AM | SSR-004 | Company name change request | In Progress | |
| | 10/22/2025 01:08:08.695 PM | SSR-006 | Portal access account add/change | In Progress | |
| | 10/22/2025 01:09:51.604 PM | SSR-007 | Payment status inquiry | In Progress | |

View More ...

Create Request

Create Request