



Supplier Quick Reference Guide

Workday Unified Supplier Portal

In an effort to simultaneously increase CNA's spend on Purchase Order and strengthen our partnership with suppliers, CNA has transitioned to Workday's procure-to-pay platform. This document provides guidance for suppliers engaging in procurement activities with CNA via the Workday Unified Supplier Portal (USP).

The 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, catalogs, and more) across multiple customers, all from one centralized log-in.

For questions not answered in this guide, please reach out to WorkdayProcurement@cna.com

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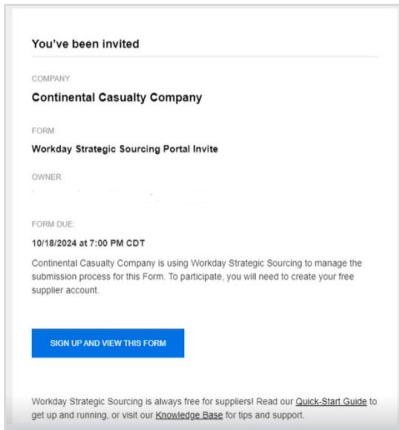
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Creating a Workday Unified Supplier Portal (USP) Account

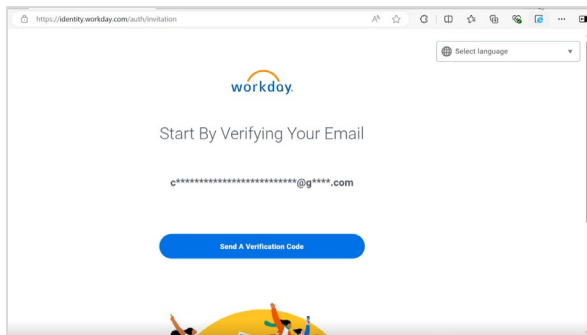
1. CNA (Continental Casualty Company) will send an invitation via email from the **Workday Strategic Sourcing Portal**



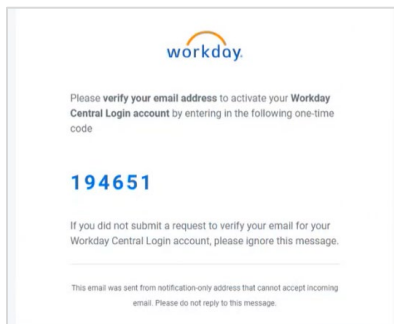
2. Click **Sign Up and View This Form**



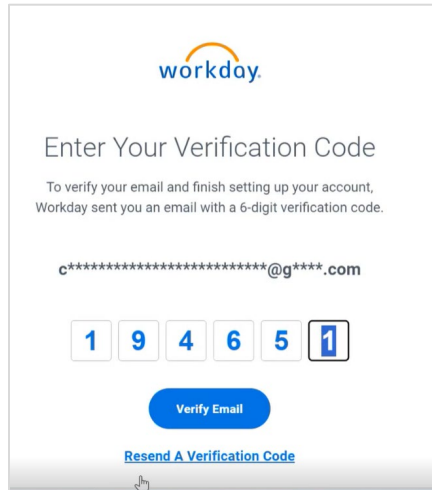
3. Complete the necessary email verification
 - Click **Send a Verification Code**



- Open the email to obtain the code

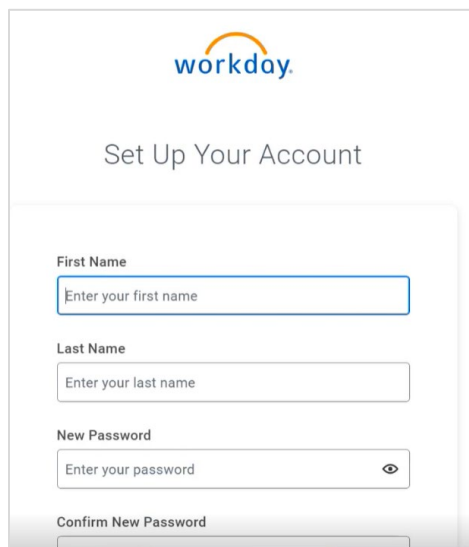


- Type in the code and click **Verify Email**



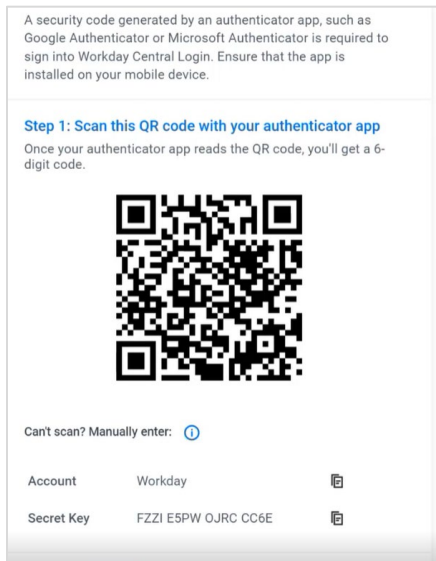
4. Continue your account setup

- Enter your information then click **Create Account**

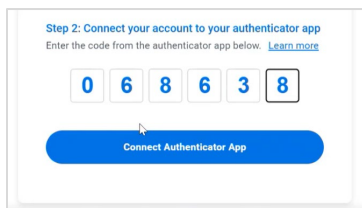


5. Complete the second verification process

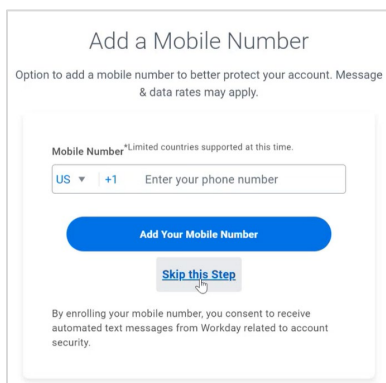
- Download and open up an **authenticator app**
 - Recommended mobile authenticator apps:
 - Authy
 - Duo Mobile
 - Google Authenticator
 - LastPass Authenticator
 - Microsoft Authenticator
 - Recommended desktop authenticator apps:
 - Authenticator
 - 1Password
- Scan the QR code with your authenticator app to receive the 6-digit code



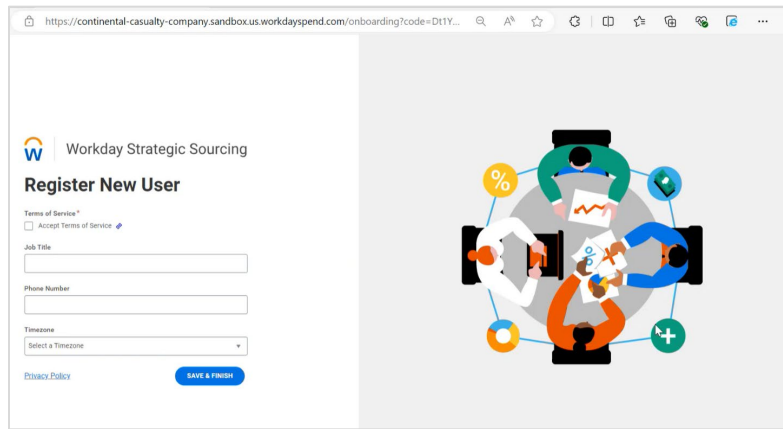
- Type the 6-digit code into your authenticator app and click **Connect Authenticator App**



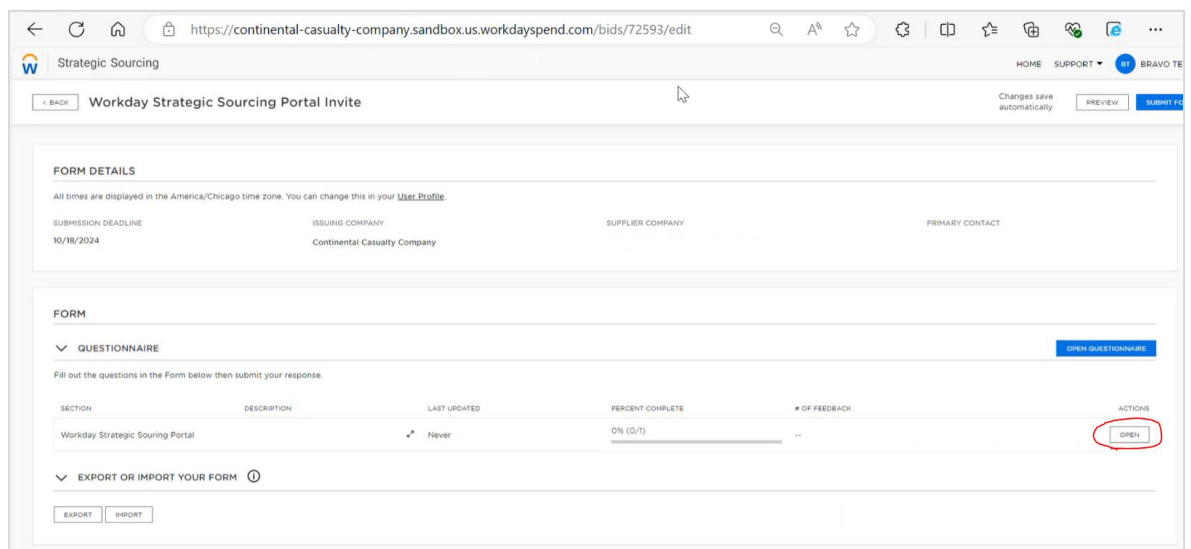
- **Add a Mobile Number** (optional) for future verification needs, or **Skip this Step**



6. The Workday Strategic Sourcing Register New User page opens
 - Check the box next to **Accept Terms of Service**
 - Enter your information then click **Save and Finish**

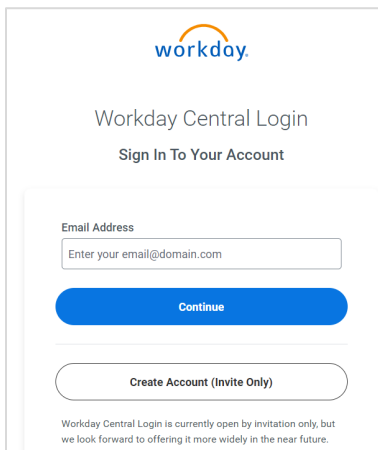


7. The Workday Strategic Sourcing Portal opens automatically to the CNA Invite
 - Under **Form > Questionnaire > Actions**, click **Open** to complete the necessary form



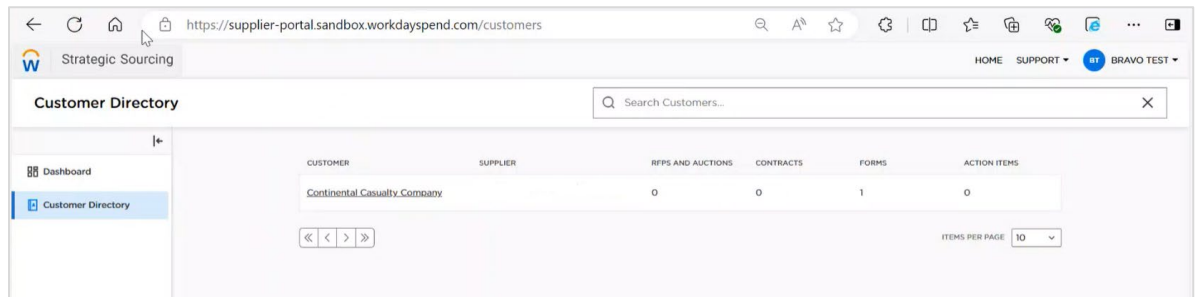
Returning to the USP: Signing In

Navigate to the [Workday Central Login](#) page directly to sign into your account

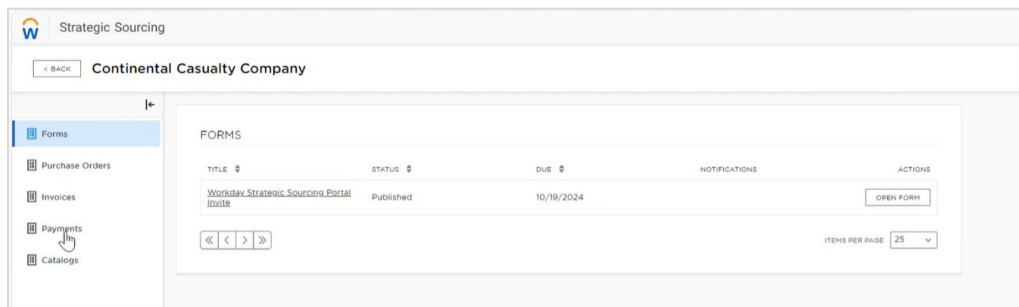


Navigating the Workday USP

1. Signing in brings you to the Workday Strategic Sourcing homepage
2. Navigate to the **Customer Directory** and under Customer click on **Continental Casualty Company** to access your procurement activities with CNA

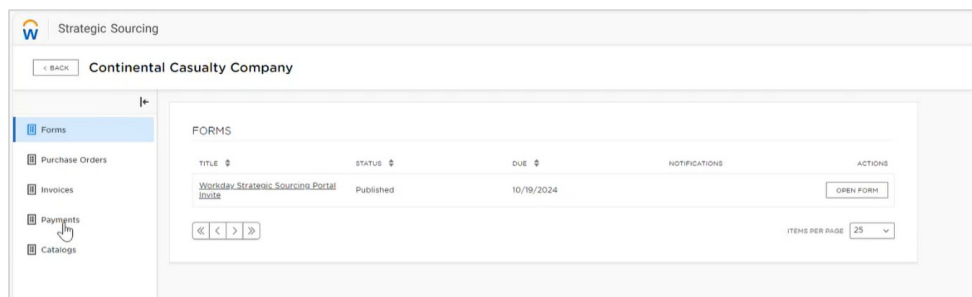


3. Use the menu on the left-hand side of the screen to navigate to the appropriate platform:
 - **Workday Strategic Sourcing** – for Sourcing/Onboarding activities
 - Forms
 - **Workday Procurement** – for PO/Invoice Processing activities
 - Purchase Orders
 - Invoices
 - Payments
 - Catalogs



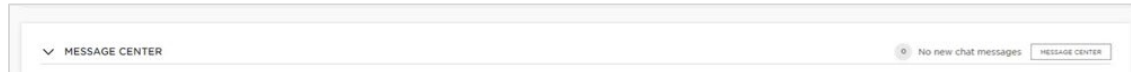
Onboarding and Sourcing Events

1. Under Customer Name: Continental Casualty Company, click on **Forms**



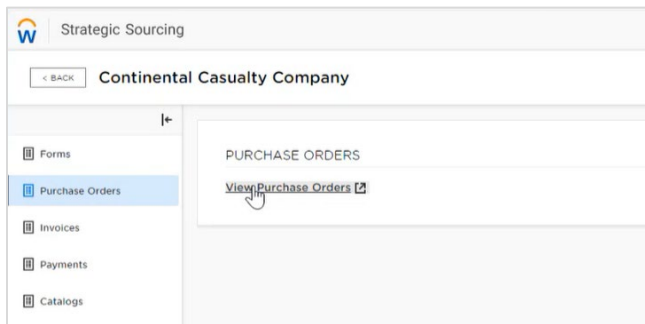
2. Under Actions, click **Open Form** and complete for any sourcing events and/or onboarding activities

- Leverage the **Message Center** for communicating with CNA regarding any sourcing activity or onboarding questions

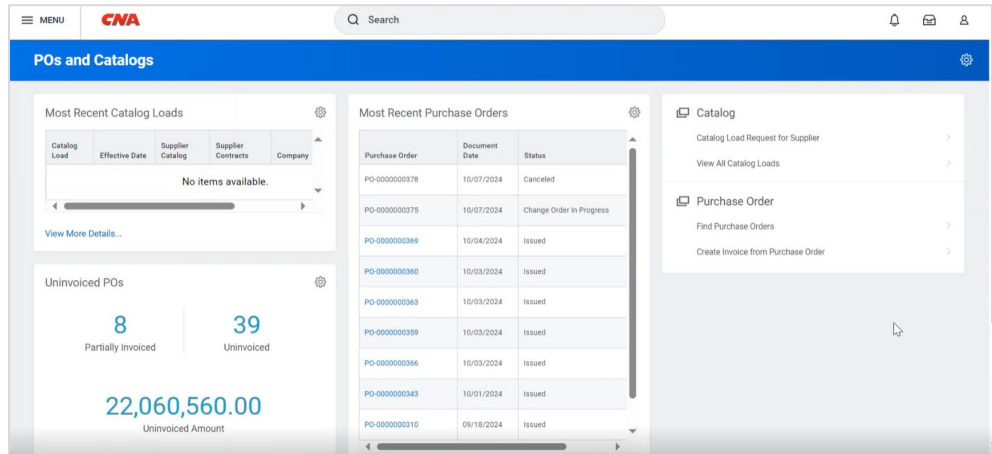


Viewing Purchase Orders

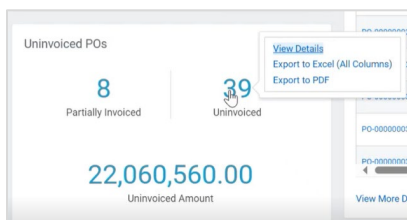
1. Under Customer Name: Continental Casualty Company, click on **Purchase Orders**, then **View Purchase Orders**



2. A new Workday Procurement tab will open, the **Most Recent Purchase Orders** are listed via the table on the home page
 - On the right-hand side under Purchase Order, click **Find Purchase Orders** to view all CNA purchase orders



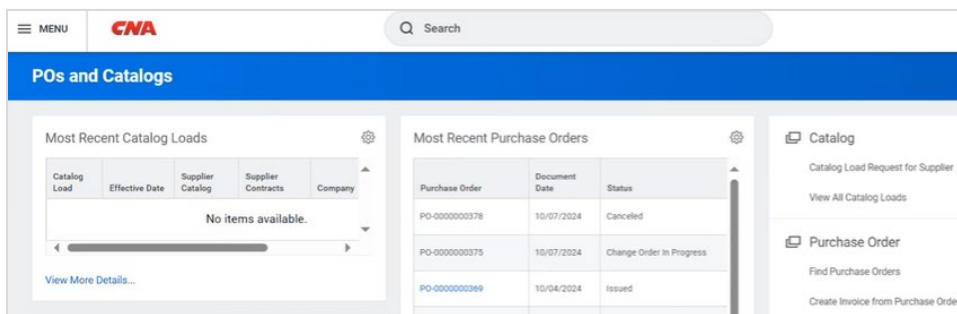
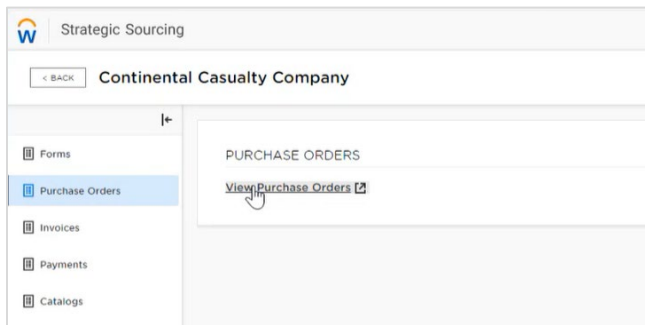
3. Under the **Uninvoiced POs** section, right click to **View Details** (or **Export** a list of uninvoiced POs to your desktop).



Purchase Order	Document Date	Status	Uninvoiced Amount	Currency
PO-0000000012	06/11/2024	Issued	100.00	USD
PO-0000000106	06/18/2024	Issued	123.00	USD
PO-0000000122	06/21/2024	Issued	10,000.00	USD

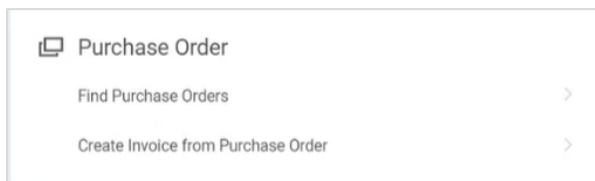
Creating Invoices

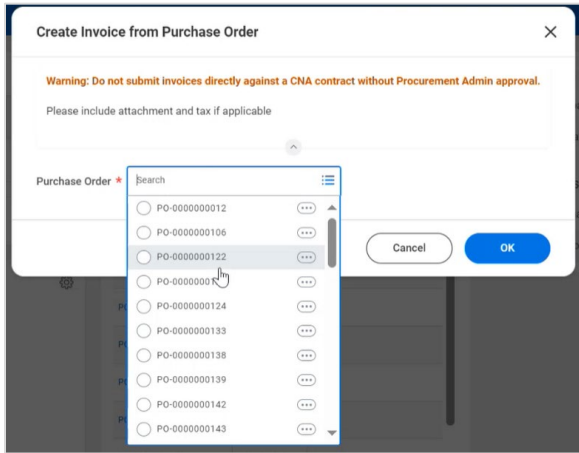
From the homepage on the Workday Strategic Sourcing platform, begin by navigating to Customer Name: Continental Casualty Company, click on **Purchase Orders**, then **View Purchase Orders** to ensure you are in the Workday Procurement platform.



Option #1

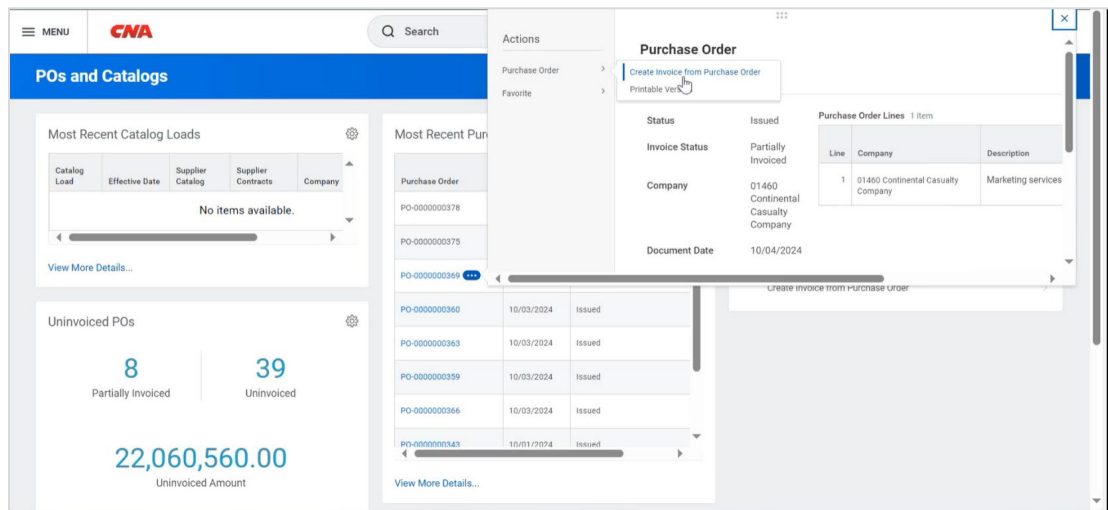
1. Under the Purchase Order section, click on **Create Invoice from Purchase Order**, then scroll to and select the purchase order you want to invoice against:





Option #2

1. From any of the PO reports, click on the related actions button (the three dots when you hover next to the PO number) for a purchase order
 - Under Actions, click on **Purchase Order** then select **Create Invoice from Purchase Order**



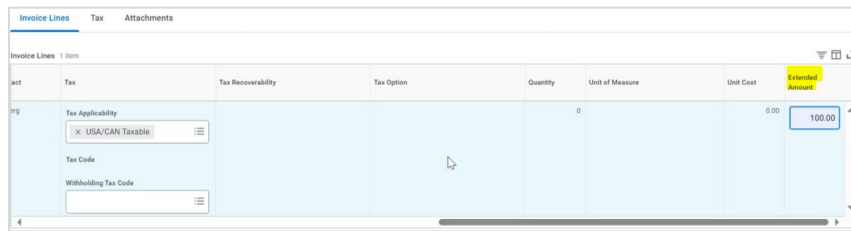
2. Fill out the necessary invoice details

3. Please ensure the following fields are filled out appropriately:

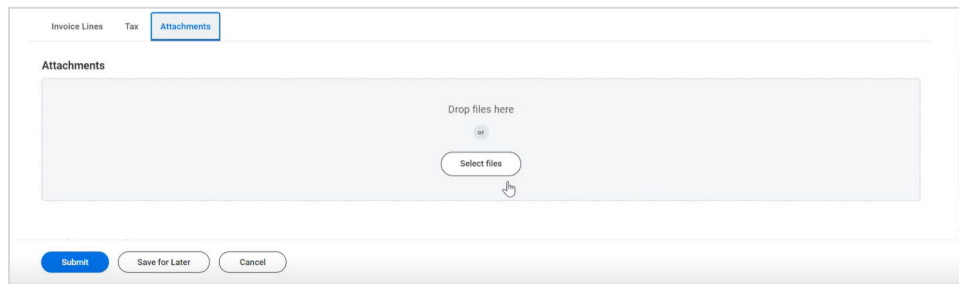
- **Remit-To Connection** – select the appropriate remit-to. (If not listed, please review the Update Profile Information section of this guide.)
- Populate the **Supplier's Invoice Number** field with your unique invoice number
- Ensure the **Invoice Date** matches the invoice date on the invoice attachment
- **Control Total Amount** - leave this field blank



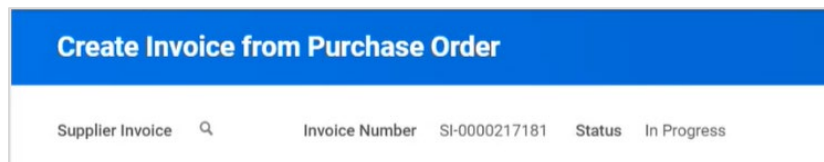
- On the Invoice Lines, the **Extended Amount** on each line should NOT include Tax or any other charges, those charges should be entered on the header level above



- Add the invoice attachment support under the Attachments tab at the bottom, (this is a requirement for submission) then click the **Submit** button

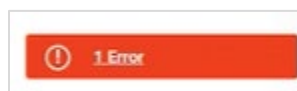


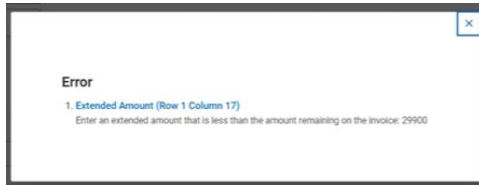
- Once submitted, the invoice Status will show **In Progress**



4. **Error support note:**

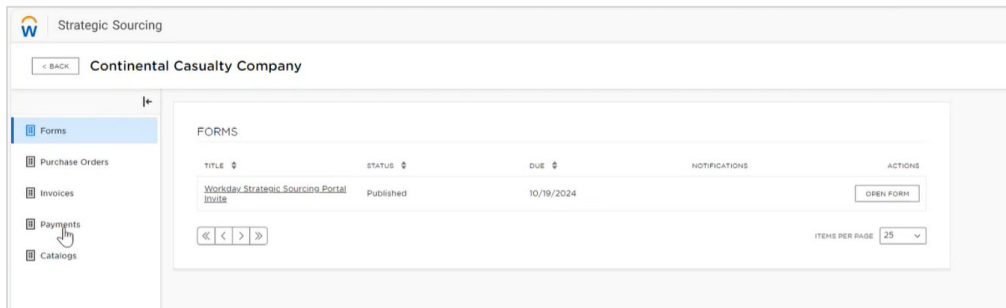
- Invoices *cannot be submitted* for greater than the PO amount or quantity approved by CNA. To request a CNA PO revision or support, please reach out to your CNA contact or WorkdayProcurement@cna.com.
- Invoices *cannot be submitted* if any of the above fields are not filled out correctly or if you are missing an attachment. Click on the Error pop up icon to see more details on what error is occurring



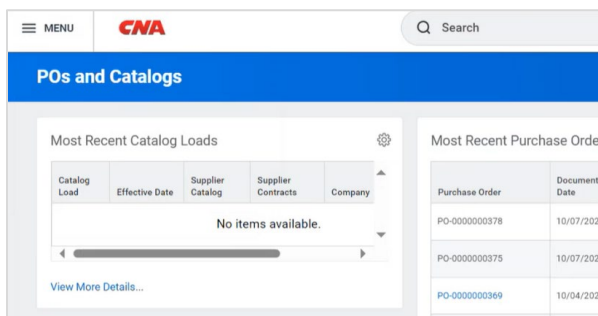


Viewing Invoices & Payments

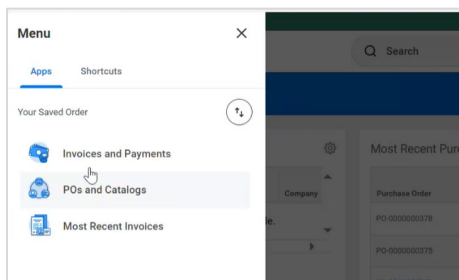
1. On the Workday Strategic Sourcing platform under Customer Name: Continental Casualty Company, click on the **Invoices** or **Payments** tabs



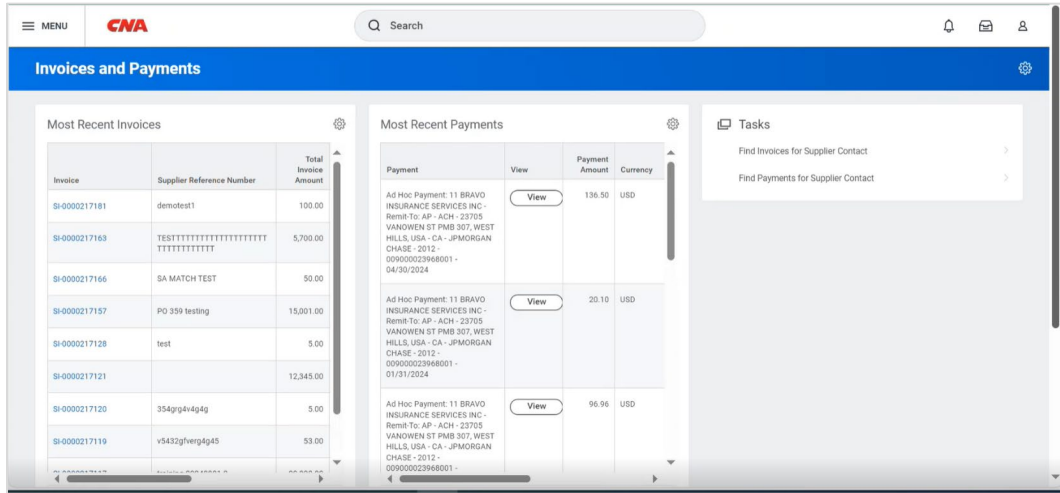
2. A new Workday Procurement tab will open, click on **Menu** on the top left-hand corner



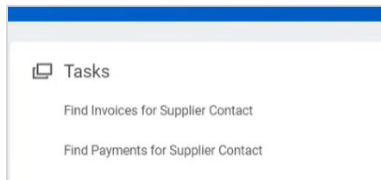
3. Click on **Invoices & Payments** to view details



4. Browse **Most Recent Invoices and Payments** via the tables on the dashboard

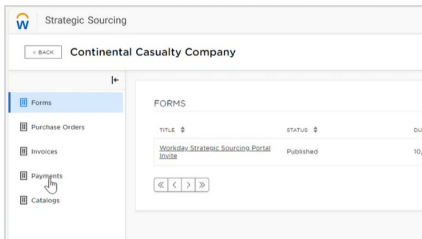


- Under Tasks, use the **Find Invoices** and **Find Payments for Supplier Contact** reports in the Tasks section to view all invoice and payments.

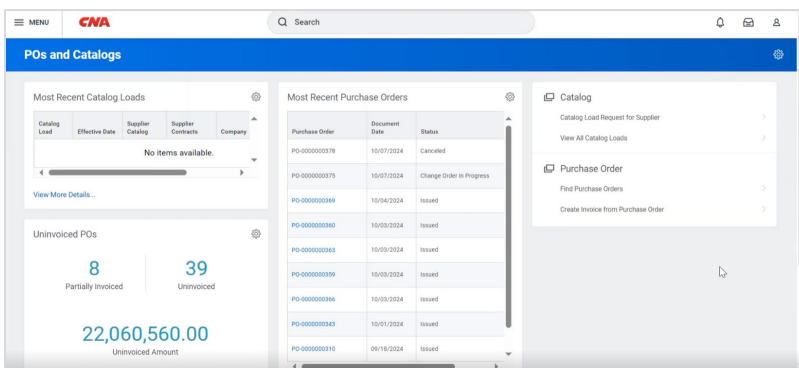


Catalog Management

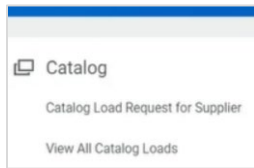
1. On the Workday Strategic Sourcing platform under Customer Name: Continental Casualty Company, click on the **Catalogs** tab



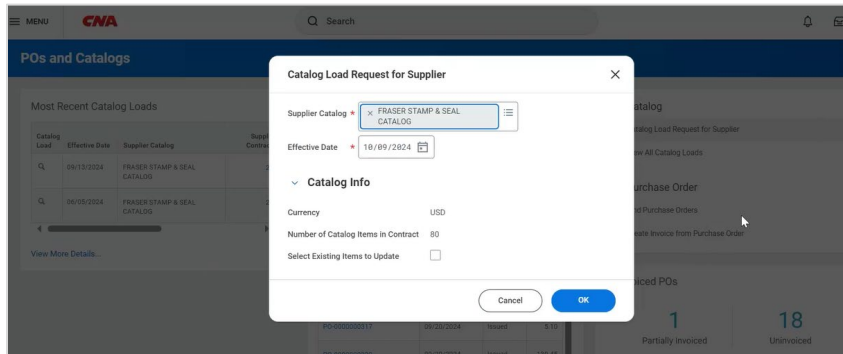
2. A new Workday Procurement tab will open to the **POs and Catalogs** dashboard and on the top left-hand corner will be a table listing the **Most Recent Catalog Loads**



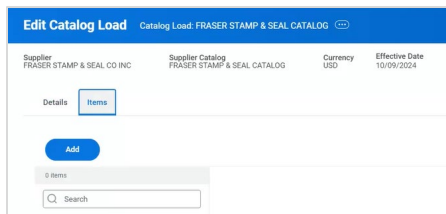
- To update the current catalog, navigate to the **Catalog** section and click **Catalog Load Request for Supplier**



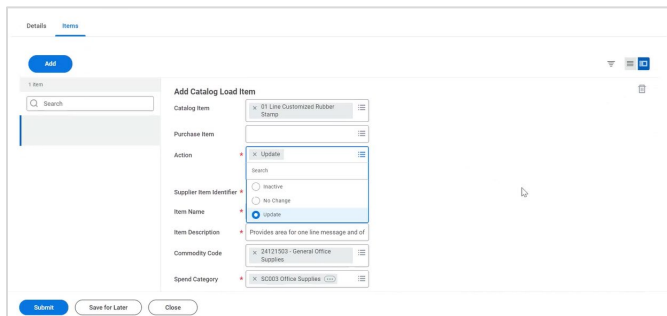
- Select the **Supplier Catalog**. If only revising existing items, click the checkbox next to **Select Existing Items to Update** then click **OK**.



- Under **Items**, click **Add**



- Option to select a current catalog item to make changes, under **Action** select **Update**



- Otherwise, fill out the item details then click **Submit**

Additional Information

Base Unit of Measure

Packaging String

Lead Time

Item URL

Item Tags

Ordering Units of Measure 1 Item

Unit of Measure	Unit Price	Price Variance	Conversion Factor	Lead Time	Default	Minimum Order Quantity	Inactive
Each	5.10	0.00%	0	5	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>

Alternate Item Identifiers 0 Items

Item Identifier Type	Value	Unit of Measure
No Data		

Submit Save for Later Close

- Once the catalog update request has been submitted, the **Status** will show **In Progress** as it has been sent to CNA to review and approve

Supplier FRASER STAMP & SEAL CO INC Supplier Catalog FRASER STAMP & SEAL CATALOG Currency USD Status In Progress Effective Date 10/09/2024

Details **Items**

1 Item

Search

Purple Stamp Pad Bottled Ink #100... Update

Catalog Load Item

Catalog Item Purple Stamp Pad Bottled Ink #100 - Bottle holds 2 oz - Use

Purchase Item (empty)

- Once the catalog request has been approved, the Status will show **Complete** and will be available for CNA customers to order from

View Catalog Load Catalog Load: FRASER STAMP & SEAL CATALOG

Supplier FRASER STAMP & SEAL CO INC Supplier Catalog FRASER STAMP & SEAL CATALOG Currency USD Status Complete Effective Date 10/09/2024

Details **Items**

1 Item

Search

Purple Stamp Pad Bottled Ink #100... Update

Catalog Load Item

Catalog Item Purple Stamp Pad Bottled Ink #100 - Bottle holds 2 oz - Use

Purchase Item (empty)

Bulk Upload Request: If you have a large number of items to update at once, please reach out to WorkdayProcurement@cna.com, who will provide you with a template to fill out and send back. The CNA team will approve via email and submit the needed bulk changes on your behalf.

Updating Profile Information

- If the appropriate **Remit-To Connection** is not available in the dropdown menu when creating an invoice or certain connections are no longer valid, please reach out to your CNA primary contact or WorkdayProcurement@cna.com to make the necessary changes.

Create Invoice from Purchase Order

Warning: Do not submit invoices directly against a CNA contract without Procurement #

Please include attachment and tax if applicable

Supplier Invoice	Invoice Number	Status
(empty)	(empty)	(empty)

Invoice Information

Company: 01460 Continental Casualty Company

Supplier: 11 BRAVO INSURANCE SERVICES INC

Remit To Connection: [Dropdown Menu]

- **Only one email address per supplier will receive PO emails from Workday.** If this email recipient needs to be updated, please reach out to your CNA primary contact or WorkdayProcurement@cna.com to make the necessary changes. Other users can simply log in to the Workday USP to view and CNA POs that have been submitted.
- If you would like **additional user(s) to have access CNA's procurement activity** in the Workday USP (POs, invoices, etc.), please reach out to your CNA primary contact or WorkdayProcurement@cna.com to provision them access.