eProcurement Express Open Source User Guide

July 2007

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User Guide

This user guide documents the capabilities of the Coupa eProcurement Express Edition solution. For your initial setup, we recommend that you review the *Getting Started Guide for Coupa eProcurement Express.*

For a demonstration of the solution, please see Coupa.com and for our community forums, please visit Coupa Forums. We suggest that you pose questions and experiences in the forums.

In addition, if you experience any technical issues with the application, you can log a ticket online through Coupa's ticket tracking system via the Coupa Wiki

This user guide is divided into sections for the 3 major types of users of Coupa Procurement:

- End User
- Professional Buyer
- System Administrator

The Coupa Enterprise Edition has additional features not available in the Express Edition. For a complete comparison, see the Feature Guide on Coupa.com.

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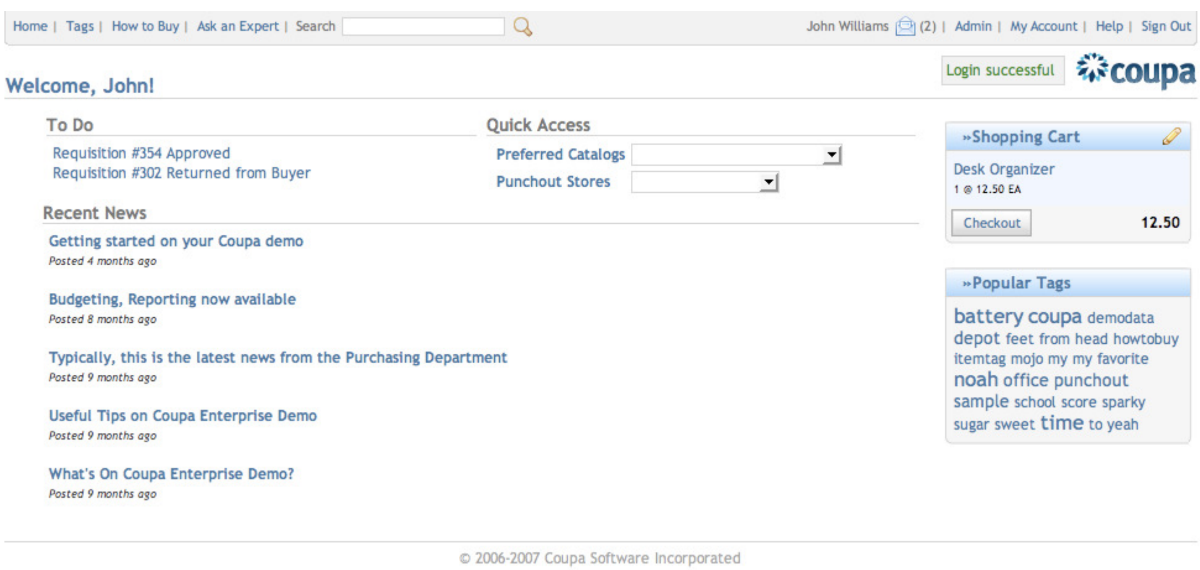
End User Guide

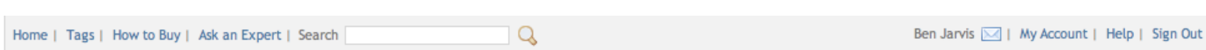
Home Page

After logging in to Coupa, you advance to the Coupa homepage. Depending on how the company's particular implementation of the application, it likely looks similar to the following image.



The homepage is your central access point to all procurement-related activities. It is composed of 4 areas: Toolbar, To Do's/Quick Access, RSS Reader and the Portlets.

Toolbar



The toolbar is for easy access to the main functions of Coupa Procurement. It has buttons for taking you to the homepage ("Home"), Tags, How to Buy, Ask an Expert, Search, Notifications, My Account and more. Each of these is discussed in detail in further sections of the user guide.

To Do's and Quick Access

Below the toolbar, the latest notifications are show to you in the To Do area. To the right of the To Do's are the Quick Access links. The Quick Access area allows you to immediately go to frequently used supplier catalogs (Preferred Catalogs), any Punchout sites and a link to enter in a non-catalog request (also known as a one-time item or service). All supplier catalogs may not be available through the drop-down list, as the buying company must designate if a supplier catalog is preferred or not.

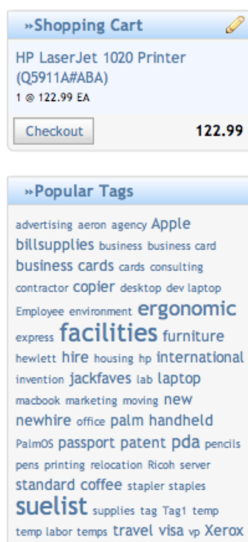
Recent News

If enabled by your company, you will see a section of Recent News, which is an RSS feed from your purchasing department.

Portlets

The right side of the homepage displays two portlets.

1. The mini-shopping cart contains the goods or services that the user has placed in it. By clicking on "Shopping Cart" or the pencil icon at the top of the portlet, you are brought to the Quick Order Entry page, where you can edit his/her cart and type in additional needs.
2. The Popular Tags portlet is a tag cloud and shows the different tags that have been assigned to catalog items, Punch Out sites, How to Buy policies and more. The more commonly used tags appear larger in the tag cloud than less frequently used tags. You can click on an individual tag to start a search for all content associated with the tag or click on words "Popular Tags" at the top of the portlet to be brought to the Tagging section.



How to Buy

The How to Buy pages provide the latest policies and other helpful information to guide you on the right way to purchase the goods and services. To view the How to Buy section, click on How to Buy in the toolbar. You see a list of all the policies that have been defined and can search or drill into for more detail.   You can do a full-text search of a policy using the search dialog above the list of policies.

How to Buy Policies

Name	Last updated
Temporary Labor and Contractor Services	09/18/06
Return Policy	09/18/06
Relocation Services	09/18/06
Print Services	09/18/06
Personal Digital Assistants (PDA)	05/27/07
Office Supplies	05/29/07
Office or Lab Furniture	09/18/06
Marketing Services	09/18/06
Legal Services	09/18/06
Gifts	05/24/07
Environmentally Friendly Products	09/18/06
Delivery Services	09/18/06
Copier Equipment	09/18/06
Computer Equipment Policy	09/19/06
Commodity Matrix	09/18/06
Chemical Products and Lab Supplies	09/18/06
Catering Services	09/18/06
Asset Purchases	06/15/07

How to Buy Integrated with Search

The enterprise policies are integrated into the global search capabilities of Coupa Procurement. If a search query matches a How to Buy policy, it is returned in the search results. The policies are displayed above the catalog content results. As an example, if you search on the string "laptop", the search may bring back a Computer Equipment policy in addition to any laptops in the enterprise catalog. Of course, all of this depends on the policies setup by the particular enterprise.

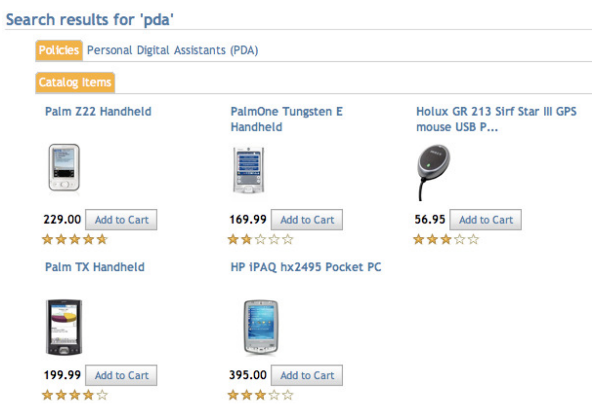
For more on Search, see the Creating Requisitions section of this User Guide.

Creating Requisitions

There are several different methods to creating requisitions in the Coupa Procurement application. You can create requisitions through drag and drop buying with items or services in the system's local catalog, Supplier Punchout items or manually entered requisitions through the Quick Order Entry feature.

Drag and Drop Buying

To begin creating a requisition for items in the system's local catalog, you type in a search string in the toolbar to find the goods or services that you require. The search results are returned and ranked on relevancy to your search term or terms. Items can be added to the shopping cart by clicking "Add to Cart" or dragging the image of the item to the mini shopping cart portlet. To see more details about the item, you can drill into the product name to view the item details. A sample search results and item details page are shown here.



On the item details, you can view the employee reviews posted by other users. To create a review, click the "Rate It" button and fill in your review. If you find a review to be offensive, click the "Report Review" link to alert the purchasing group of the issue. The purchasing group will review and remove if needed.

An item can be added to the cart by dragging the image to the mini-shopping cart or clicking "Add to Cart" button. When added, the portlet flashes momentarily and then you see the item in your cart. You can continue to find additional items and add them to the cart until ready to checkout. To checkout, you click Checkout button in the mini-shopping cart portlet. To remove an item from the cart, you can roll the mouse over the item. A red icon with a "-" appears next to the item. You can click the icon and the item will be removed. To do additional modifications (e.g., change the quantity from 5 to 2), add line level attachments, etc., see the Quick Order Entry section below.

Search

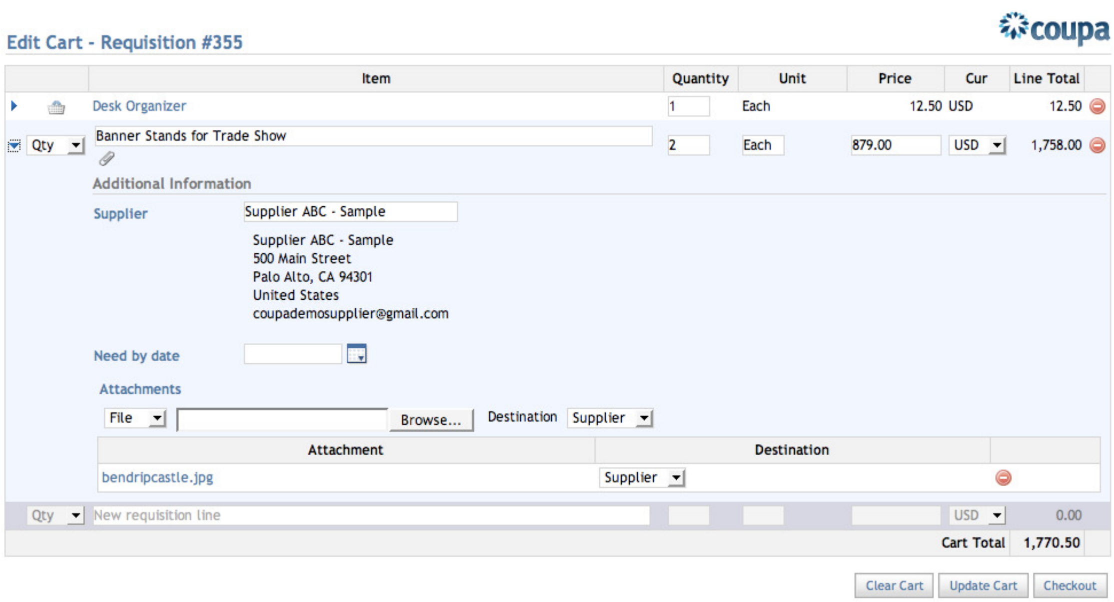
Using Coupa's search capabilities from the toolbar, you can find items in or references to supplier catalogs, how to buy policies, supplier Punchout sites and Web Forms without executing multiple searches. The system allows phrases using quotation marks (" ") and operators of AND, OR and NOT in the search.

Multiple special searches are available for power you to target their queries:

Special search	Example:	Purpose
How: [search term]	How: Legal	Searches the fulltext of all how to buy policies and returns all matches to the search term
Ask: [search term]	Ask:brochure	Searches the knowledgebase of Ask an Expert questions and answers to find matches to the search term
Tag: [search term]	Tag:ergonomic	Searches all catalog items, how to buy policies, Punchout sites and Web Forms that are tagged with the search term

Quick Order Entry

Using Coupa's Quick Order Entry, you have additional flexibility to create requisitions efficiently and modify what is currently in the cart. To access Quick Order Entry page, click the words "Shopping Cart" or the pencil icon in the mini-shopping portlet.



From the Quick Order Entry page, you can perform a variety of functions. Items can be removed from cart, quantities can be changed, files can be attached, cart can be cleared and more. At any point, you can initiate a checkout when finished or continue shopping.

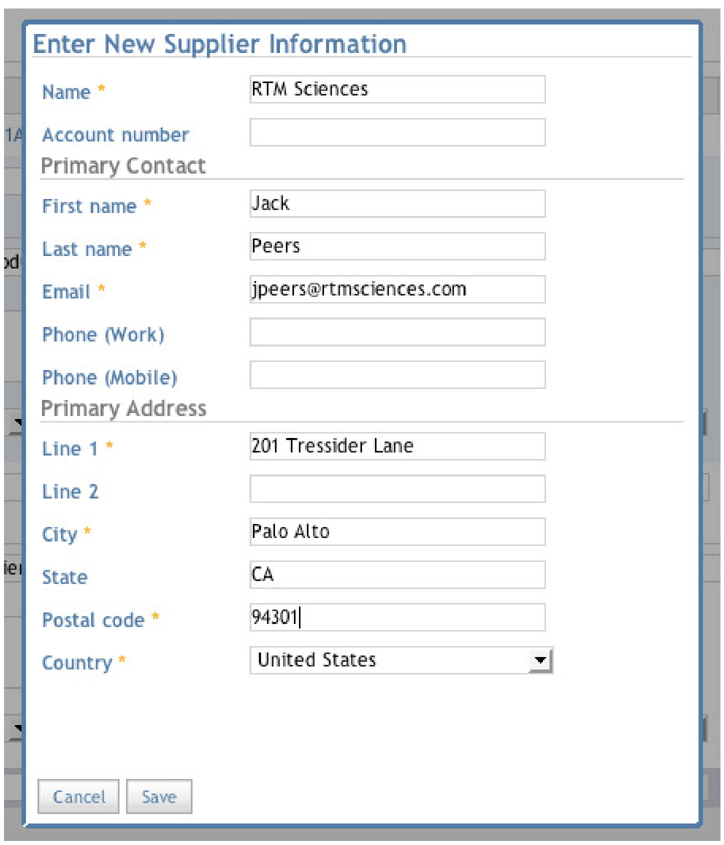
- Recalculate cart: Examines any changes to the cart and recalculates line and requisition totals
- Clear cart: Empties the cart and brings user to homepage
- Checkout: Brings user to checkout page
- Add lines: Creates blank lines on the shopping cart. From this point, you can manually type in a requisition line. The system checks if that item exists in its catalog. You can put in quantity and price of the item or amount of the services requested. If the item requested is not part of the existing contracted items, the additional information area automatically expands. From

here, you can enter additional information about this line, including supplier, attachments (e.g., line-item justification or statement of work), need-by dates. If you wish to use a vendor that is not currently in the system, see the New Supplier Request section of this guide.

Coupa Procurement allows for both quantity-based and amount-based lines on a single requisition. You may choose amount-based lines, using the drop-down, for things like fee-based services (i.e., a market research study).

New Supplier Requests

When you are putting in a request for an item/service that does not exist in the catalog (and thus doesn't not have a supplier associated with it), the system auto-expands the additional information associated with the particular line. If you know the vendor that can supplier the item/service, you can type in the vendor name into the Supplier field. The system looks to match the user's typing with a supplier that already exists in the supplier database. For instance, typing in "ABS" brings back a list of suppliers including "ABS Services" and "Donavan Labs". You should pick the appropriate supplier. If the vendor does not exist in the database, you can enter in a new supplier request by typing in the vendor name in the Supplier field. By tabbing out of the Supplier field, the system pops-up a New Supplier Request form for you to enter in the details about the vendor. Complete the form and click Save. When you submit the requisition with the New Supplier Request, the requisition is forwarded to the Procurement department. A buyer makes the determination to activate the supplier (possibly gathering additional information about the supplier) and allow further processing of the requisition.

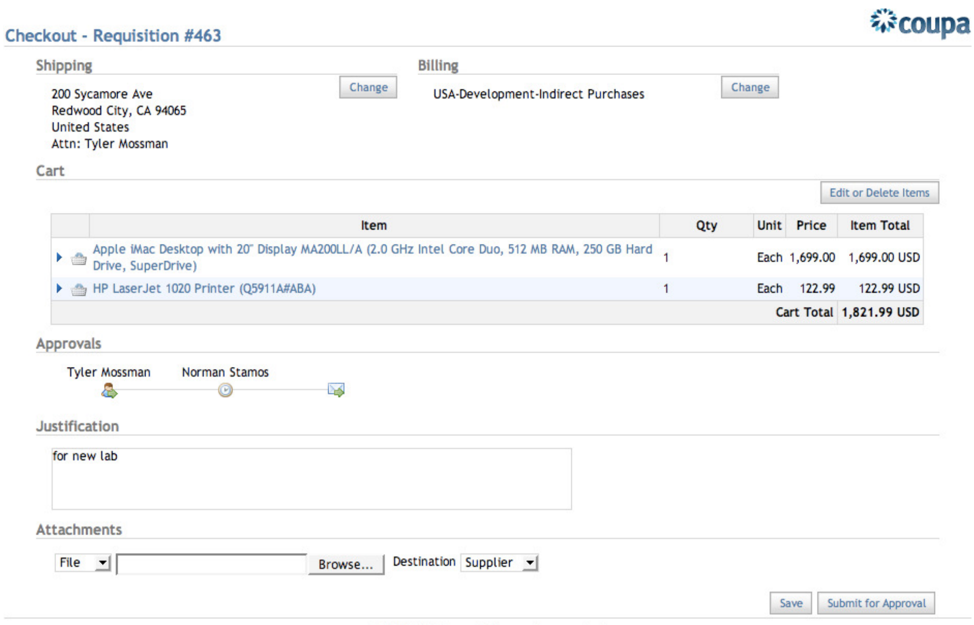


Punchout

A company can establish a Punchout link to a set of suppliers, allowing you to shop at a supplier website instead of inside their Coupa application. You will shop at the supplier website, add your items to the shopping cart of the supplier's site, and then checkout. When you checkout, you will return to Coupa, with the items from the supplier transferred to your Coupa shopping cart.

Submitting Requisitions

You submit requisitions via the checkout page. The checkout page gives you an opportunity to review the items in the shopping cart, set the appropriate ship-to address and billing account, see the approval chain, provide a justification and attach any files to the requisition.



If you need to modify their shopping cart, this can be accomplished by clicking the "Edit or Delete Items".

Shipping and Billing

You specify the appropriate shipping and billing information on the requisition. If the information is incorrect, click the change button. When changing a shipping address, you see your personal address book and can select the appropriate one. It is recommended that you set your most common address as default, so that each future requisition comes with that address defaulted in the shipping section. You may also add a new address (for instance, your home office address) on the change shipping address page.

To pick the appropriate billing information, you select from a list of accounts that have been established in the system. The account may have one or more segments depending on the implementation. A search mechanism is provided to quickly find the right account string. You choose the appropriate one and can optionally set a particular account as default.

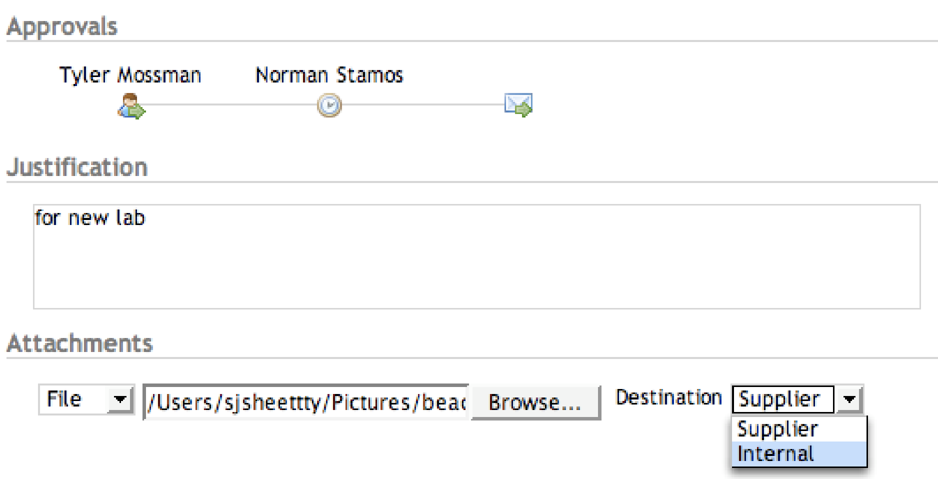
If your company has issued you a P-card, or Procurement cards, it will likely be available in the billing area of the checkout page. If you would like the supplier to charge your P-card and not invoice the company, then you should check the P-card box below the account information. When the purchase order is sent to the supplier, they will also receive your p-card details. Please note that P-card information does not replace or override the account information. The P-card box only tells the supplier how to bill the company.

Approval Chain

On the checkout page, the system provides the appropriate approval chain on the requisition. This chain is generated based on the rules in the system. Approvers will receive an email notification to let them know to approve or reject the requisition.

Justification and Attachments

The requisitioner can submit a justification for the requisition in the appropriate text box. More detailed justifications or other attachments (such as a statement of work or detailed specifications) can be attached to the requisition. You click "Browse" to pick the appropriate file from the local computer. If the attachment is meant for internal use only, the destination of "Internal" should be selected. If “Supplier” is selected for the attachment and the requisition gets approved, the supplier receives an email with the purchase order and a link to access the attachment. In addition to file attachments, Coupa supports URL attachments (where the user specifies a particular URL) and text-based attachments where the user can type a note as the attachment.



Requisition Approvals

Most requisitions require one or more approvals. The system automatically generates the appropriate approval chain. Approvers are notified that their approval is required via an email notification and a message is sent to the Inbox of the user.

The email notification lists the requisition information so that the approver can decide to approve or reject the requisition. At the bottom of the notification are links to allow the approver to quickly disposition the requisition.

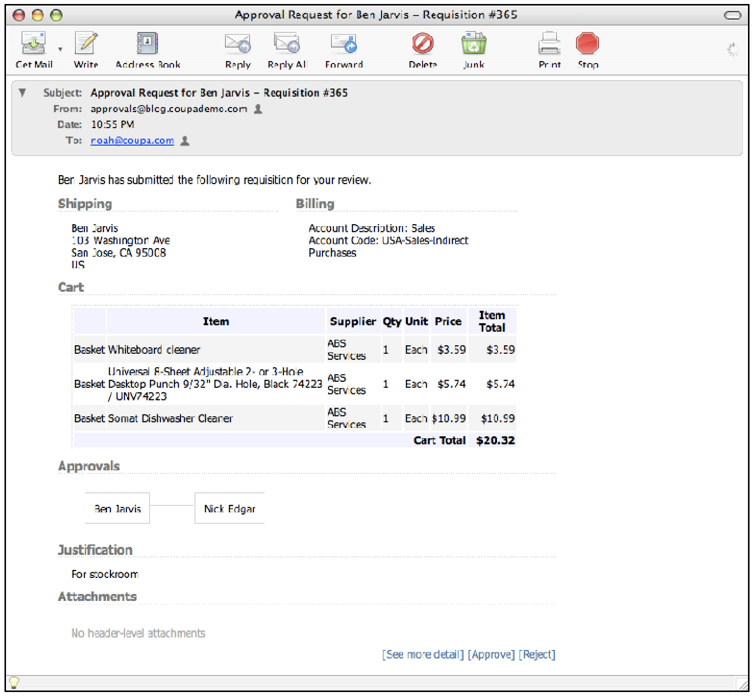
Notification Inbox

All notifications that are sent to your email account also populate the Coupa Inbox and the To Do area on the homepage. The Inbox can be accessed by clicking the Envelope icon on the global toolbar. If there are no new notifications, the icon is a "closed envelope". If there are new notifications, the icon is an "open envelope." Additionally, the number of new notifications is listed next to the icon.

When viewing the Inbox, you see the notification subject and the date received. Drilling into the subject line brings you to the details of the notification. The approver can see any attachments associated with the requisition. If you reject the requisition, you can enter a rejection reason which will be communicated to the requester.

Offline Approvals

Coupa allows approvers to disposition the requisition without logging into the Coupa application. If you need to approve a requisition, you will receive a notification via email. You can simply click the “approve” or “reject” links at the bottom of the notification. In most email systems, when either of those links is clicked, the email system creates a new email with a special code. By sending the email (the To: address is already filled in), Coupa receives the email with disposition the requisition based on the special code. If you click the “See more detail” link in the email notification, you are taken to a Coupa screen to view all the details of the requisition, including any attachments on the requisition. Please note that you need to log into Coupa to see all the details.



Approving through notifications may work with many popular cellular and smartphone devices depending on the email client on the device. This process has been tested on certain Blackberry models, such as the 7100.

Checking on Approval Status

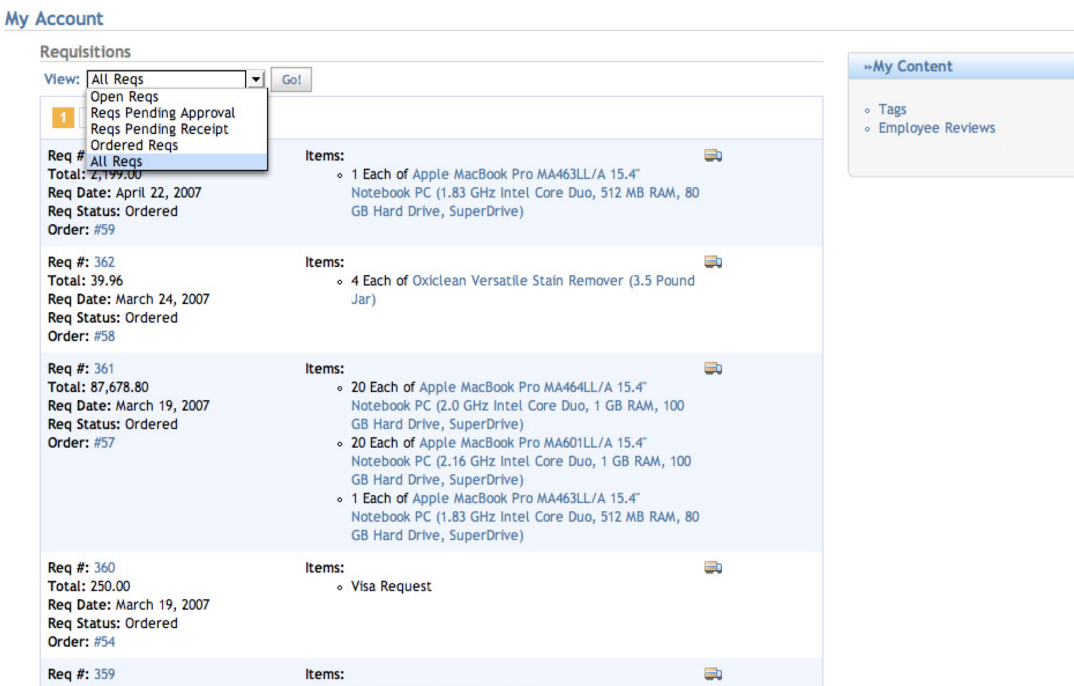
You can follow the progress of the approval in the My Account area. See that part of User Guide for more information.

Attachments on Approvals

As an approver, you can view any header or line-level attachments on the requisition. To access the attachment, click on the file name and the system opens up the attachment.

My Account

The My Account area of Coupa Procurement provides you with the ability to check order status, review past orders, receive goods and services, review your tags and employee reviews and more. To access the My Account section, you click My Account on the global toolbar.

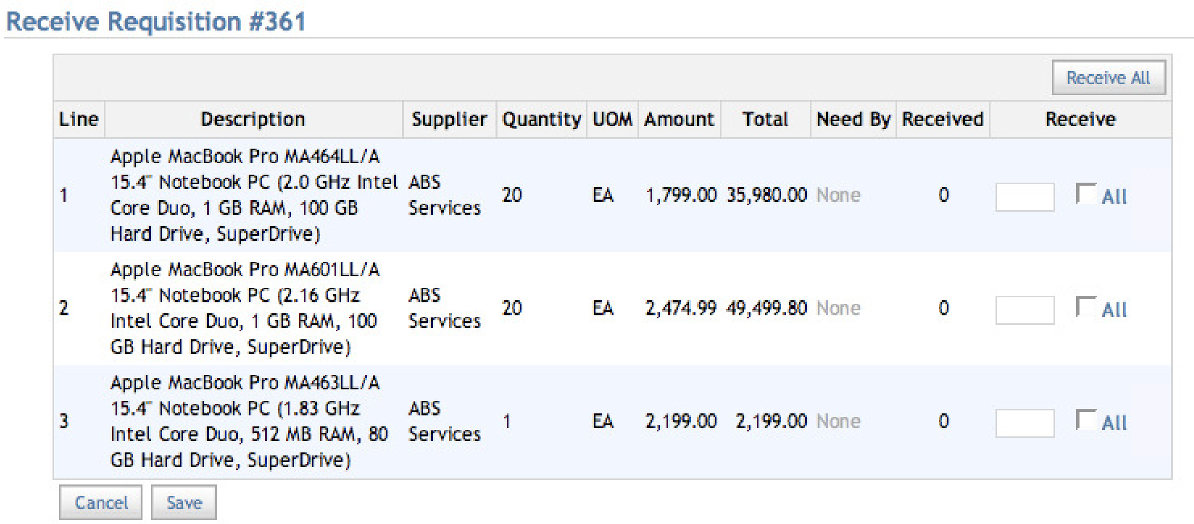


By using the different views, you can quickly access requisitions where approvals are in-process (Reqs Pending Approval), draft requisitions (Open Reqs) and more. By clicking the "details" icon, you can see the status of approvals. In addition, you can drill into the purchase order details, and from there, view the PDF that was issued to the supplier.

If a requisition is not yet ordered, you may withdraw the requisition. If you withdraw the requisition, it is no longer in the approver's or buyer's queue. It will be listed as a draft requisition in the My Account area and you can edit the requisition and resubmit.

Receiving

Coupa's receiving functionality permits you to indicate if you have received the goods or services that you ordered. By clicking on the "truck" icon, you are brought to the receiving page. Here, you can quickly receive the entire requisition by clicking Receive All or receive line by line. Partial receipts are allowed, and you can view what has been received to date for each requisition line. Click "Save" to save the receipt in the system.



Receive Requisition #361

Receive All

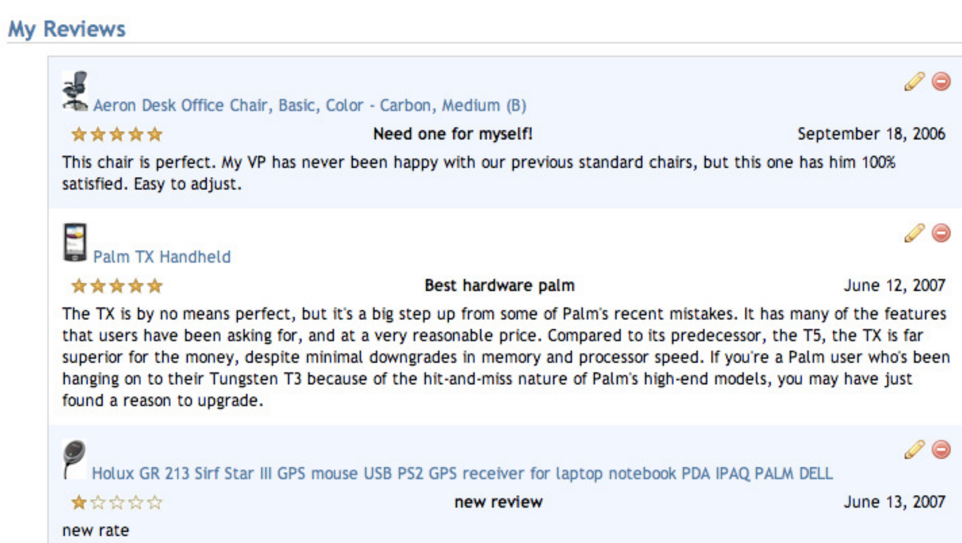
Line	Description	Supplier	Quantity	UOM	Amount	Total	Need By	Received	Receive
1	Apple MacBook Pro MA464LL/A 15.4" Notebook PC (2.0 GHz Intel Core Duo, 1 GB RAM, 100 GB Hard Drive, SuperDrive)	ABS Services	20	EA	1,799.00	35,980.00	None	0	All
2	Apple MacBook Pro MA601LL/A 15.4" Notebook PC (2.16 GHz Intel Core Duo, 1 GB RAM, 100 GB Hard Drive, SuperDrive)	ABS Services	20	EA	2,474.99	49,499.80	None	0	All
3	Apple MacBook Pro MA463LL/A 15.4" Notebook PC (1.83 GHz Intel Core Duo, 512 MB RAM, 80 GB Hard Drive, SuperDrive)	ABS Services	1	EA	2,199.00	2,199.00	None	0	All

Cancel Save

My Content

In the My Content portlet on the My Account page, you can manage much of the content that you have created in the system. By clicking on the "Tags" link, you can view your personal tag cloud. Below the cloud, you see each tag and the associated content that has been tagged (also referred to as "taggings"). You can delete the tag or the taggings. As an example, a user may have created a tag called "new hire" to be able to easily order the goods when a new person joins the company. You then tagged 10 items with the "new hire" tag. On this My Tags page, you could delete the tag "new hire" or can remove the taggings from 1 or more of the 10 items.

In the My Reviews page, you can easily manage your employee reviews. When this page is accessed, you view all of the reviews that you have posted. You can modify the review by clicking "Edit" or delete the review.



Ask an Expert

Ask an Expert is set of capabilities in the Coupa Procurement application that encourages collaboration, facilitates knowledge sharing and helps you get answers to your questions. The Ask an Expert section of the application can be accessed through the toolbar. Once at the Ask an Expert main page, you can subscribe to Ask an Expert categories, post a new question, answer questions posed by other you, query the knowledgebase and more. Below is a sample screenshot of an Ask the Expert main page. Of course, this page depends on how this capability has been implemented and configured.

Search the Knowledgebase

You can search the knowledgebase of all questions and answers. It is a good idea to search first before posting a new question, as that question may have been answered already. To search the knowledgebase, the global search shows "ask:" already filled in. You append your query onto this, such as "ask:chicago advertising services supplier". "ask:" is one of the many advanced operator searches that is supported by Coupa Procurement. If the system finds a match or matches, you can review these postings before posting a new question. The system displays the original question and you can drill down into all the answers and resolution of the question.

Post a Question

To post a new question, you enter your question in the "Ask a new question" region of the page. The best questions are detailed enough to get proper responses. You must also choose an Ask an Expert category for the question. These categories, which are defined by the organization, help route the question to the right experts in the organization. One or more answers to user's question can be posted by the subscribers to the category. If you want to add to or clarify the original question, you can add to the thread. When you are satisfied that the question has been answered, you can close the question. At this point, no further answers are permitted except by the person originally asking the question or the category moderator. The category moderator is intended to be someone that continually monitors the Ask an Expert category and ensures all questions are being answered properly.

Managing Subscriptions

You can subscribe to Ask an Expert categories, except for categories that have been determined to be private or invitation-only. To subscribe, you select the appropriate category from the drop-down list and click "Subscribe". At this point, the category appears in the your list of subscriptions. You can drill into the category to see the list of open and closed questions, unsubscribe from the category and set the email preferences. If you would like to receive an email notification of all new questions and answers in that category, you should check the appropriate box. By default, this option is not selected.

Answering Questions

To respond to an open question, you should click on the question. At this point, you see all current answers. By clicking "Answer", you can post a response.

Viewing your Ask an Expert Activity

At the bottom of the Ask an Expert main page, you can monitor your activity on Ask an Expert. There is a list of the questions that you have posed, as well as the questions that you have answered. If you has not posed or answered questions, these regions will not be visible. The main page shows the latest questions in these regions and includes a link for you to see all activity.

Content Tagging

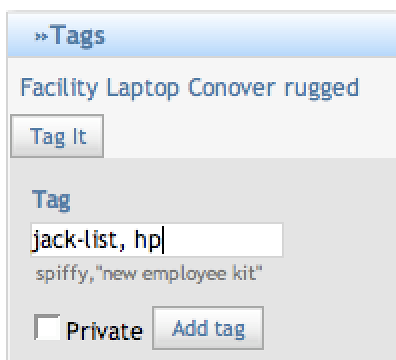
Tagging provides an easy way for you to assign a "term" to an item or set of items. By adding a tag to an item, you can easily locate the item, can help improve searchability, and can share the tags with others and more. A tag can contain one or more words. Some examples of tags and their potential use:

1. ergonomic - could be used for all ergonomic-related items in the catalog
2. laptop - could be used for all laptops, notebooks, tablets, etc. so when a user searches on laptop, he/she is brought to all associated items
3. "debbie new hire" - a user could have created her own personal list for when a new hire is brought on-board.

The tag cloud portlet on the home page shows the common tags that have been used by the organization. If a certain word is larger, it indicates that the word (or phrase) is a popular tag. You can click on any tag in the portlet and the system finds all items, Punchout sites, Web Forms and How to Buy policies associated with the tag.

Tagging Items

To create a tag on an item, you must be on the item details of an item. On this page, a Tags portlet exists on the right-hand side. It shows all existing tags of the item. By clicking "Tag It", the portlet expands and allow you to type in additional tags. By default, all tags are public. Public tags allow for easy sharing with colleagues. You can click the private checkbox so the tag associated with this item will not be accessible by others.



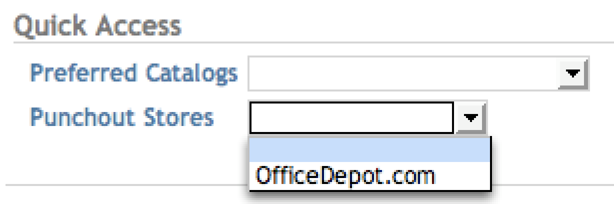
In this example, the item is already tagged with several terms. You are adding "smartphone" and "suelist" as public tags on the item.

See the My Account page of this guide for instructions on managing your tags.

Punchout

Punchout functionality allows you to shop at selected external websites and bring back their external shopping cart into the Coupa application. You complete the requisition and do the checkout process in Coupa. Many of the larger office supply vendors, MRO suppliers, technology equipment vendors and others support the Punchout protocol.

If your organization has enabled certain vendors for Punchout, a link to the vendor's site appears in the Quick Access links on the homepage. Additionally, the Punchout link may be shown based on the search query. For instance, if an organization has enabled a vendor such as OfficeDepot.com for Punchout shopping, your homepage may look like this:



By clicking on the Punchout site, you are taken to the website of the supplier. You can shop on the supplier's site and add items to your cart. When all items have been added, you should initiate the checkout process at the supplier's site. However, instead of going through the checkout at the supplier's site, the Punchout redirects you back to the Coupa application. All the items that were in the cart at the supplier site now appear in the Coupa shopping cart. From that point, you can continue to shop or checkout through the Coupa application.

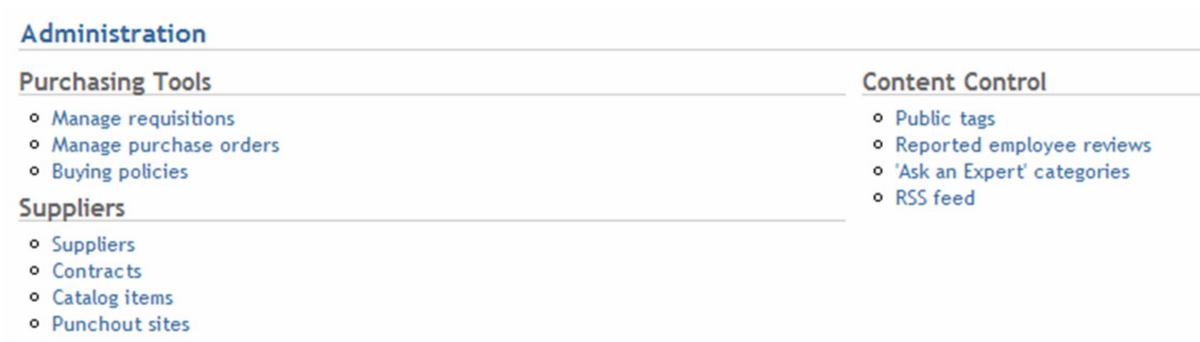
Professional Buyer Guide

Professional Buyer Overview

If you are assigned the buyer role, you have additional privileges beyond those of the end-user. The buyer can manage transactions, supply base, contracts and content, Punchout sites, user-created content and more. Additionally, the buyer is responsible for managing the incoming requisitions that require action before they can be finalized and approved.

General Navigation for Buyer

The buyer can access these additional capabilities by clicking the Admin link in the global toolbar. At this point, the buyer views the buyer administration console.



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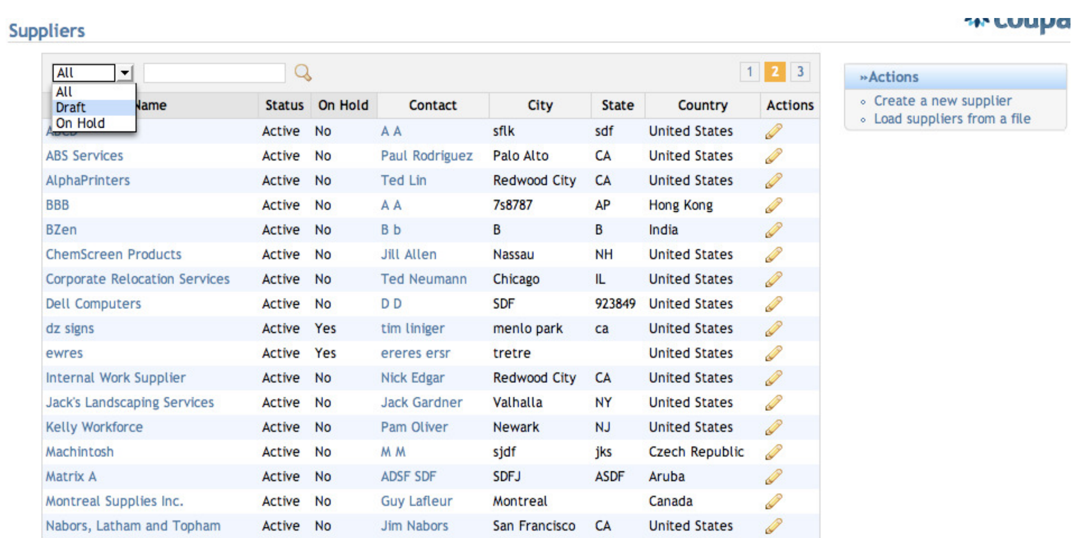
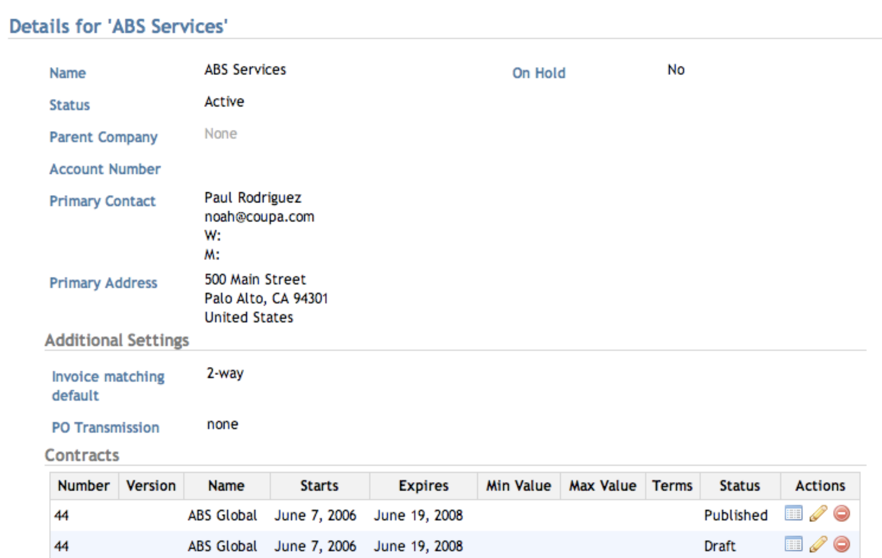
Managing Suppliers

Buyers can manage their supply base through the Suppliers page accessed from the Buyer Administration page. When opening the page, you see a list of current suppliers, including the primary contact information for the supplier. You can do a query of suppliers using the search dialog box above the list of suppliers. A sample table of suppliers is shown below. As with most tables in Coupa, you can execute search, sort the data (darker shaded columns) and move quickly through the table using the page navigation on the top right side of each table. In the example, there are two pages of data in this table and you are on the first page. By clicking the box with "2" in it, you advance to the second page.



To view the details of the supplier, click on the details icon located in the Actions column. The system displays the primary contact and address information along with parent company information, if applicable. Additionally, any contracts for this supplier are listed in the table. The buyer can quickly view and edit the contracts related to the supplier as necessary.



Creating Suppliers

Buyers can add suppliers via the user interface or through the bulkload process. The Actions mini-portlet on the Supplier page gives access points to the functions. To create a supplier via the user interface, click "Create a new supplier". The buyer inputs the supplier name, parent company (if applicable), primary contact and primary address information.

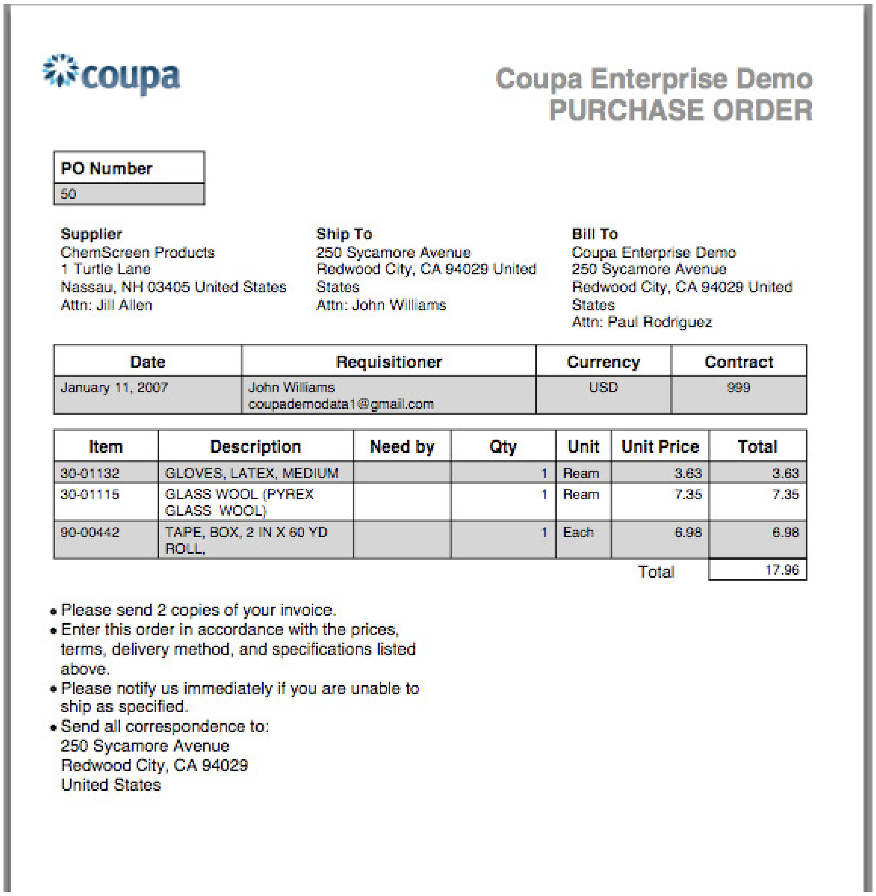
To access the supplier bulkload process, click "Load suppliers from a file". At this page, the buyer can download the CSV file to use as a template for uploading. Enter the information in the CSV file, typically using a spreadsheet program. To add a supplier, type "Add" in the Action column for the row. To edit a supplier, type "Update" in the Action column. When updating a supplier, you must enter the Supplier ID in the second column.

Required fields are marked with an asterisk "*". In the file, there are some columns headings are marked with double asterisks "**". When there are two column headings with double asterisks located next to each other, it indicates that these are related columns. In this situation, the buyer must enter a value in one of the two columns. As an example, the file has Primary Address Country Code and Primary Address Country Name as related columns. You can either enter a value for the Country Code or Country Name. The CSV file that you edited can now be uploaded by clicking the Browse button and selecting the file from your local computer. Press "Go" to begin the process. The system gives a status of the upload and taken to the Data Sources page after upload is complete. On this page, you see the status of the upload. If errors were encountered, you can click on the "with errors" link for the associated file to see any invalid rows.

Purchase Order Communication

Purchase orders can be issued electronically to the suppliers via email or an electronic XML standard (cXML). On the supplier record, you can choose your communication preference or you can choose to not send the PO electronically. However, most of your suppliers will want to receive via email. Purchase orders are emailed to the supplier contact’s email address when each PO is issued. It is important to ensure that the correct email address is listed for the supplier contact. The supplier receives an email with a pdf version of the purchase order attached to the email. The filename of the pdf file includes the purchase order number.

If you added an attachment(s) on the requisition with destination of supplier, the supplier receives a URL link to retrieve the attachment(s) in the body of the email.



Coupa Enterprise Demo
PURCHASE ORDER

PO Number
50

Supplier
ChemScreen Products
1 Turtle Lane
Nassau, NH 03405 United States
Attn: Jill Allen

Ship To
250 Sycamore Avenue
Redwood City, CA 94029 United States
Attn: John Williams

Bill To
Coupa Enterprise Demo
250 Sycamore Avenue
Redwood City, CA 94029 United States
Attn: Paul Rodriguez

Date	Requisitioner	Currency	Contract
January 11, 2007	John Williams coupademodata1@gmail.com	USD	999

Item	Description	Need by	Qty	Unit	Unit Price	Total
30-01132	GLOVES, LATEX, MEDIUM		1	Ream	3.63	3.63
30-01115	GLASS WOOL (PYREX GLASS WOOL)		1	Ream	7.35	7.35
90-00442	TAPE, BOX, 2 IN X 60 YD ROLL,		1	Each	6.98	6.98
					Total	17.96

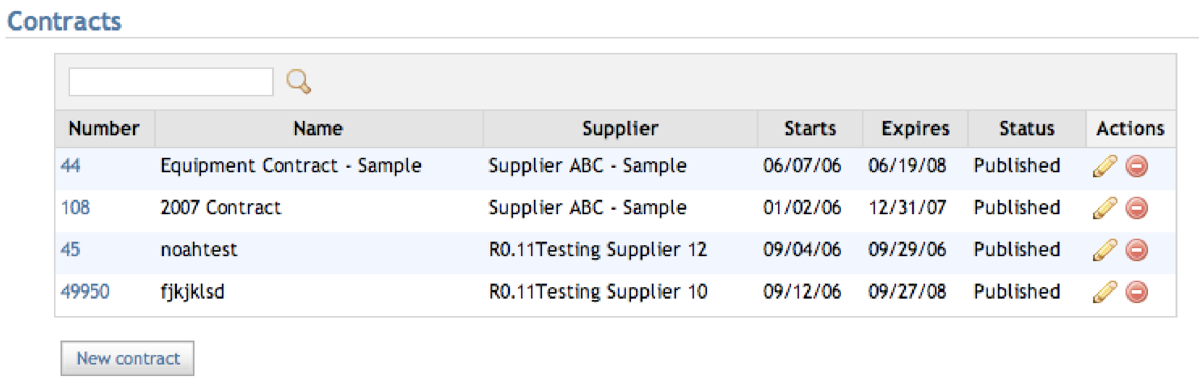
- Please send 2 copies of your invoice.
- Enter this order in accordance with the prices, terms, delivery method, and specifications listed above.
- Please notify us immediately if you are unable to ship as specified.
- Send all correspondence to:
  250 Sycamore Avenue
  Redwood City, CA 94029
  United States

Placing Vendors on Hold

You can place a supplier on hold, which prevents the application from issuing new purchase orders to the vendor. This may occur if you have product issues, financial disputes or other reasons to temporarily stop working with the supplier. You can place a hold on the supplier by checking the “On Hold” box on the supplier record. All orders will be held in a queue and you will have visibility to the number of held orders. To remove the hold, uncheck the “On Hold” box and all purchase orders will be released.

Managing Contracts

Coupa provides contract management functionality to create, edit and maintain supplier contracts. When the Contracts page is accessed, you view the list of existing contracts. Details of the contracts are shown, including the supplier name, expiration dates and status. You can view, edit or delete the contract from the Actions column. And, like most tables, you can query of existing contracts using the search dialog box above the list of contracts.

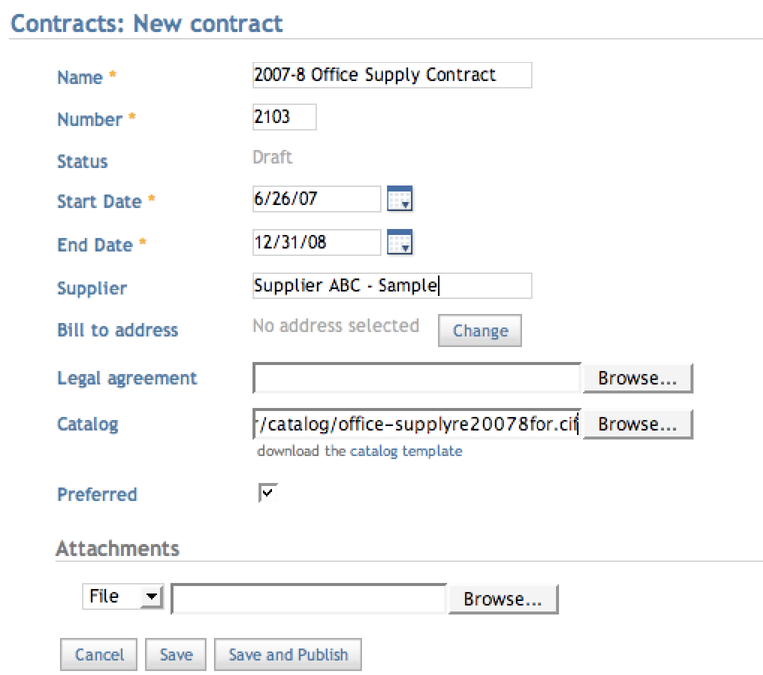


Number	Name	Supplier	Starts	Expires	Status	Actions
44	Equipment Contract - Sample	Supplier ABC - Sample	06/07/06	06/19/08	Published	
108	2007 Contract	Supplier ABC - Sample	01/02/06	12/31/07	Published	
45	noahtest	R0.11Testing Supplier 12	09/04/06	09/29/06	Published	
49950	fjkjklsd	R0.11Testing Supplier 10	09/12/06	09/27/08	Published	

To view the details of the contract, click on the details icon located in the Actions column. You see additional details of the contract, including attachments and the number of catalog items associated with the contract. To view the catalog items, click the "Show" link.

Creating Contracts

To create a new contract, click the "New Contract" link. You need to enter in the necessary information as shown below. The contract can stand as a framework agreement for the relationship between the buying company and the vendor or could be a contract governing specific items/services. A company may have multiple contracts with a given vendor.



Creating Catalogs

There are 3 methods to creating catalog items:

1. Loading a catalog file inside a contract via CIF format

   To create a new contract Catalog items are loaded inside the contract. A catalog template is provided on the contract page as a sample of the information that can be loaded into the system. Coupa supports the CIF (Catalog Interchange Format) for loading, which is very similar to a CSV format. The required and optional fields in the CIF format are listed in the template document. When the CIF file is ready to load, select the file from the local computer and enter it in the Catalog field of the New Contracts screen. When all information is entered, press "Save" to file this contract in Draft (not usable mode) or "Save and Publish" to publish the contract. If a catalog file is attached to the contract, the loading process begins when the contract is published. The load status will initially show 0%. Check the Data Sources link to see progress of the catalog load. Effective dates of a contract allow the buyer to manage when the contract is available to the end-user. Published contracts are available for use, so all items/services related to that contract can be ordered.

2. Create a catalog item through the user interface

   You can create catalog items individually by clicking the “Catalog Items” link from the Admin menu. Then click the “Create a new catalog item” link. You will be asked to fill out a name, item description, unit of measure, price, currency, supplier part #, lead time and image (the last 3 being optional). Additionally, you must pick the contract that this item is associated with.

3. Create a set of items through a CSV bulkload

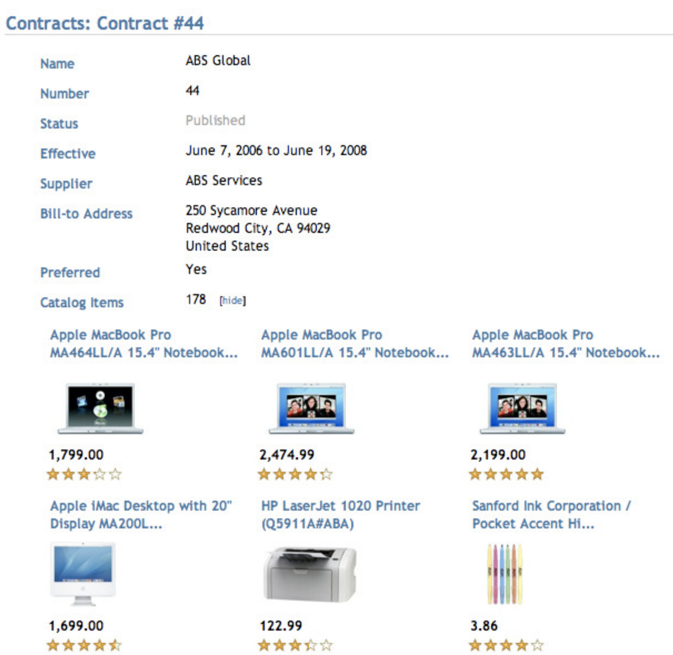
Possibly the easiest way to create a set of items (and modify them) is to use the CSV catalog loader. From the “Catalog Items” link on the Admin page, click “Load catalog items from a file”. Download the current CSV template and complete. The columns marked with an asterisk are required. This CSV loader also makes it easy to modify existing items.

Editing Contracts

Organizations may wish to edit existing contracts during their lifecycle. To edit a contract, press the "pencil" or edit icon on the specific contract that needs editing. When a contract is being edited, the published version of the contract remains valid (can be used for transactions). A new version of the contract is created in Draft status. All elements of the contract, except the contract number and supplier, can be altered in the new version. Items/services can be added, changed or deleted. When all changes are completed and the new version is ready for use, click "Save and Publish". If additional changes may be necessary or the new version is not ready for purchase execution, click "Save". The new version remains in Draft status. In the list of contracts, both the Published and Draft versions are visible.

Managing Catalog Item and Services

As mentioned above, catalog items and services are loaded in the contract. When a user chooses the particular items/services from the catalog and creates a requisition, the system knows the appropriate contract/vendor to apply for the purchase order. To manage the local catalog, edit the appropriate contract. When editing a contract, new items can be added, existing items may be deleted and items can be changed. Add new items via the catalog CIF loader process. To delete items, click the "Show" link next to the number of catalog items associated with the contract. This shows all items in the contract. Press the "Delete" button next to the items that are to be deleted. To edit the item, click on the item name and make the appropriate edits. Below shows how a user can view the contract and associated catalog items.



Punchout Management

Buyers can review the existing Punchout sites via the Punchout sites link on the Buyer Administration page. A list of all Punchout sites is listed along with their description. To initiate a Punchout session, you can click on the Punchout site name which is hyperlinked. Only personnel with the system administrator role can create or modify Punchout sites.

Managing Requisitions

Buyers manage the requisition flow and can work on requisitions that do not have the required information necessary to convert them into purchase orders upon approval. Various circumstances may require buyer intervention in these requisitions, such as a one-time item purchase where a vendor relationship has not existed, a services order where a contract is not in place, etc. This process can also be used when the end user needs a quote on a particular new item and wants assistance from the purchasing department. Required information on a requisition includes vendor (must be approved status), item, qty/unit/price (quantity-based items), amount (amount-based items), billing and shipping information, and contract. If required information is missing, the requisition goes into the requisition pool for buyer action. The flow for requisition management:

1. End user submits requisition
2. If all required information is available, requisition goes to approval (step 6)
3. Requisition goes to requisition pool
4. Buyer adds additional required information and sends back to end user
5. End user resubmits requisition for approval. If required information is still missing, go to step 3.
6. Requisition goes through approval chain
7. Requisition is converted to PO or POs and sent to the vendor

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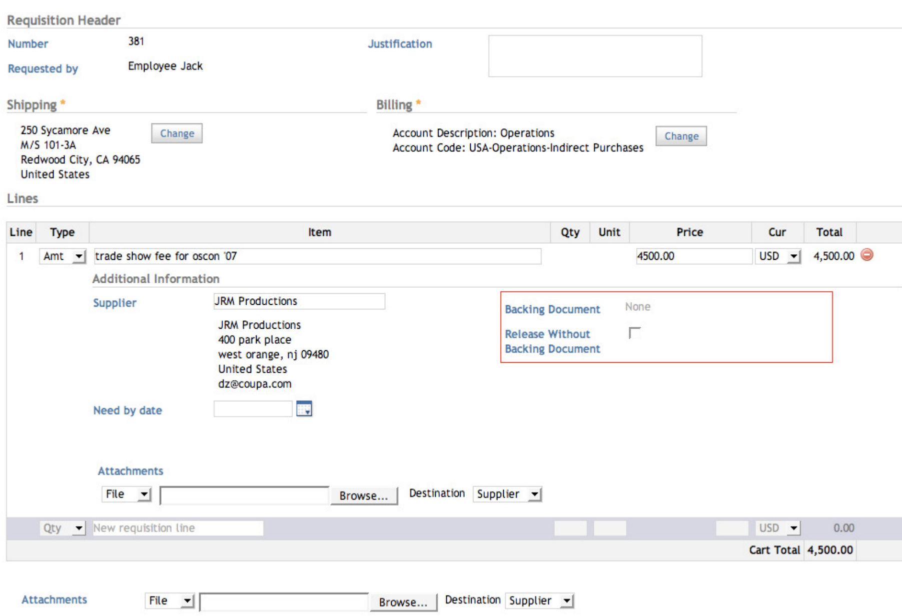
Requisition Pool

Buyers access the requisition pool from the Buyer Administration console. By clicking the “Manage Requisitions” link, you will be taken to the list of all requisitions that are in the status of “Pending Buyer Action”. Buyers also see requisitions of other statuses, such as “ordered”, “sent for RFQ”, “pending approval”, etc. You view a list of requisitions in the pool, including the requisitioner and requisition total. To do a query of requisitions in the pool, use the search dialog box above the list of requisitions. If the requisition is “Pending Buyer Action”, you can open and modify a requisition by clicking the “edit” icon. The header and lines of the requisition are shown, as in the example below:



The system places a red box around any information that is missing, such as no price or no supplier. At the header level, you view and can change the billing and shipping information, attachments and requisition justification. Below the header are the individual lines of the requisition. You may modify the existing lines, delete lines (click the minus icon) and/or add new lines (click "Add lines" button) to the requisition. To modify the existing lines, you enter the appropriate information. If no supplier is listed, type in the supplier name. You can type in part of the name and the system automatically searches and brings back potential matches. After the vendor is selected, you can pick from the contracts associated with the vendor or choose to release the line without a backing document.

You may choose to type in a note to the end user in the text box below all the line information. This is helpful in explaining the additional details that have been added. When the necessary information is added to the requisition, you click "Return to Requester" which returns the requisition to the end user. A notification is generated to the end user to let him/her know that the requisition is now available and can be edited and/or submitted for approval.

Handling New Supplier Requests

End-users can enter in a request for a new supplier while creating a requisition. When they do this, the vendor is created in draft status. Based on the standard configuration of Coupa, requisitions with a new supplier request are immediately forwarded to the requisition pool after the end-user submits the requisition. As a buyer, when you open a requisition with a new supplier request, you can see an “Edit” and “Activate” buttons next to the supplier details on the requisition line. By clicking the “Edit” button, you can view and edit the vendor information that was created by the requisitioner. To enable the vendor, you can press the “Activate” button. If you wish to remove the vendor, he or she can do it from the Suppliers page (see Managing Suppliers section).

With typical rules, the supplier must be activated before a PO can be issued. Upon activating the supplier, you can both create a contract and associate it with the requisition line or the buyer can agree to release the requisition line without a contract. Once this step is taken, you can return the requisition to the employee who can send it up for management approval.

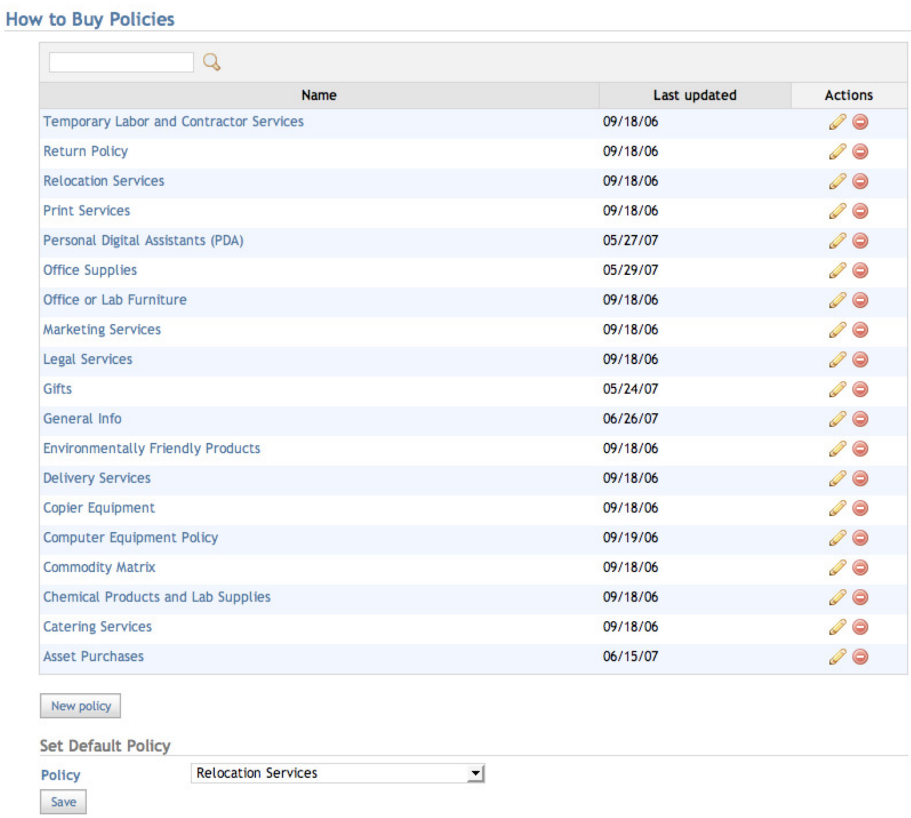
Viewing Requisitions

From the “Manage Requisitions” link, the buyer can get a view of all requisitions in the system. The buyer has different views, including viewing the requisitions that have been ordered, sent for RFQ, pending approval, draft, etc. The buyer can also use the search mechanism to find current and old requisitions.

Managing How to Buy Policies

How to Buy Policies direct end-users to follow the appropriate rules during the purchasing process. Instead of the purchasing group having to maintain these policies on an internal website or policy manual, the department can now incorporate these directly into the Coupa application. Through the use of tags, these policies are shown to the end-user along with other search results.

Access the How to Buy Policies page from the Buyer Administration page. You see a list of current policies, the date that the policy was last updated as well as actions to view, edit or delete the how-to-buy policy.

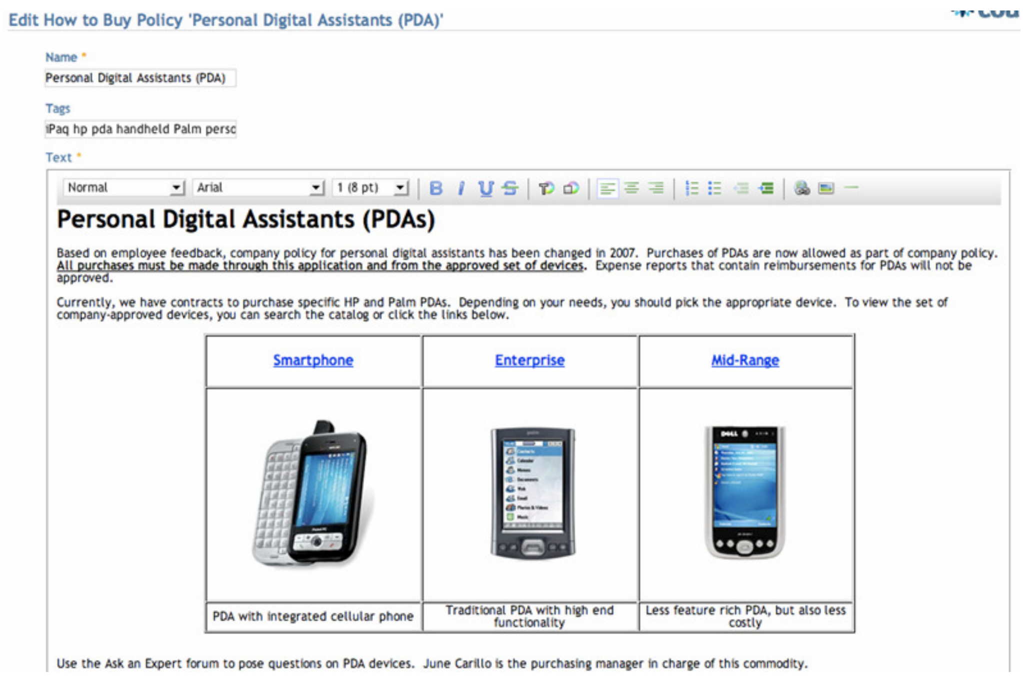


Name	Last updated	Actions
Temporary Labor and Contractor Services	09/18/06	
Return Policy	09/18/06	
Relocation Services	09/18/06	
Print Services	09/18/06	
Personal Digital Assistants (PDA)	05/27/07	
Office Supplies	05/29/07	
Office or Lab Furniture	09/18/06	
Marketing Services	09/18/06	
Legal Services	09/18/06	
Gifts	05/24/07	
General Info	06/26/07	
Environmentally Friendly Products	09/18/06	
Delivery Services	09/18/06	
Copier Equipment	09/18/06	
Computer Equipment Policy	09/19/06	
Commodity Matrix	09/18/06	
Chemical Products and Lab Supplies	09/18/06	
Catering Services	09/18/06	
Asset Purchases	06/15/07	

Creating a How to Buy Policy

At the bottom of the list of policies, you can click on "New Policy" link to create a new policy. On the policy creation page, enter in the policy name and tags related to the policy. The tags determine whether the policy will be returned in the search results. For instance, a buyer create a How to Buy policy for Computer Equipment with tags that include "laptops", "IT", "desktops", "workstations", "computer", "network", etc.

In the Text box, you create the policy text. If a policy document already exists (e.g., on an intranet site or in a word document), the buyer can cut and paste the policy into the Text box. Much of the formatting is maintained. To create the text manually, just enter the text in the editor. The WYSIWYG editor allows the policy to have different fonts, font sizes, various formatting, colors, indentation, bulleted lists and more. Pictures or images can be incorporated into the policy. You can use the hyperlink tool of the WYSIWYG editor to create hyperlinks in the policy. These hyperlinks can point the user to various locations. Examples include a supplier's website, additional documents or even point you to specific items or search queries. When finished entering the text, click "Create" to create the How to Buy policy.



Editing Existing How to Buy Policies

To edit an existing policy, click the pencil icon in the Actions column for the appropriate policy. You can add additional tags to an existing policy through the Tags mini-portlet. When editing the How to Buy policy, the policy appears in the WYSIWYG editor.

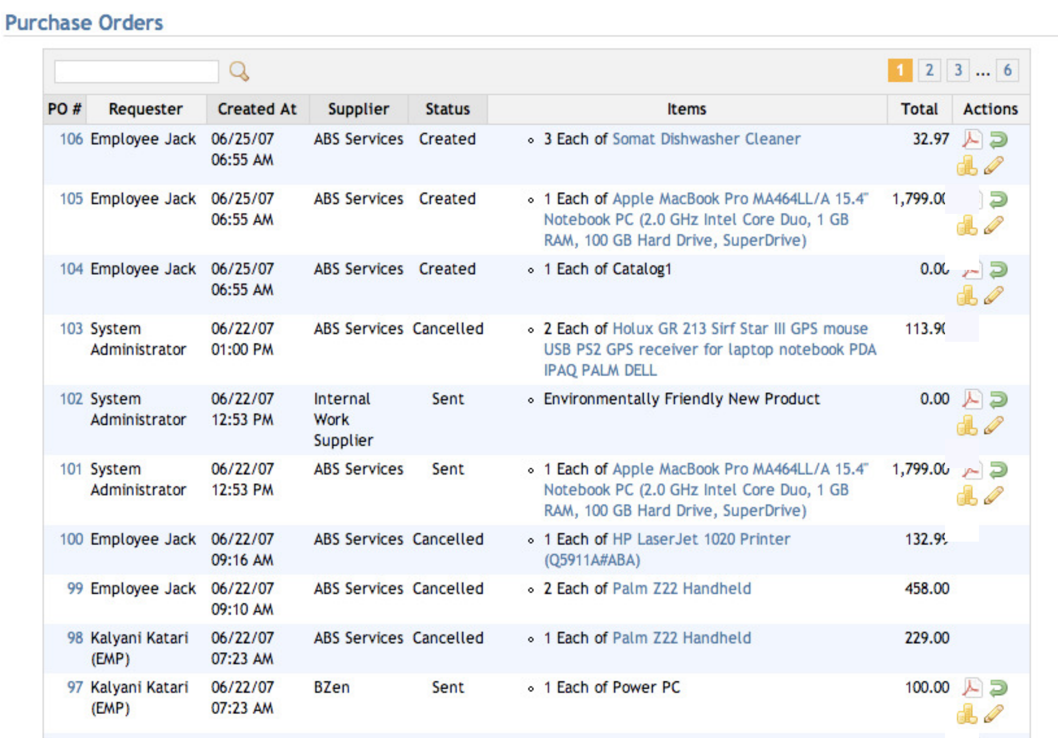
Creating a Default Policy

You can set one policy as your default policy. This policy will be returned in the search results if the system finds no other policy, PunchOut site or catalog items that match the user’s search. The default policy can be helpful as a “catch-all” to point users in the right direction.

Managing Purchase Orders

The system creates purchase orders as soon as a requisition receives all necessary approvals. As a buyer, you have access to all orders in the system via the "Manage Purchase Orders" link from the Buyer Console. You will see the list of all orders and some key information about the order, such as requester, creation date, supplier, status, order total and items. In the Actions column, you can view the PDF version of the purchase order, cancel the order, and edit the order. You can drill into the order number to see the additional details about each order. The drill-down allows the buyer to quickly view the life-cycle of the order, including all revisions of the order, comments, amount received, as well as download the PDF order.

When viewing the order, the buyer can add internal comments by typing in the comment into the "Add Comment" box and clicking the green "add" icon. All comments will be stamped with the user's name and timestamp. Additionally, the buyer can note the purchase order as "Acknowledged" by the supplier. The acknowledgment flag and comments are tracked on the order, but do not create a revision of the order. If the purchase order has been changed by the buyer (see Making Changes to a Purchase Order) at some previous point, you will see a "Revision" drop-down next to the purchase order number. The system always shows the current revision by default. To see an older version, pull down the drop-down.


Purchase Orders

1 2 3 ... 6

PO #	Requester	Created At	Supplier	Status	Items	Total	Actions
106	Employee Jack	06/25/07 06:55 AM	ABS Services	Created	3 Each of Somat Dishwasher Cleaner	32.97	
105	Employee Jack	06/25/07 06:55 AM	ABS Services	Created	1 Each of Apple MacBook Pro MA464LL/A 15.4" Notebook PC (2.0 GHz Intel Core Duo, 1 GB RAM, 100 GB Hard Drive, SuperDrive)	1,799.0(	
104	Employee Jack	06/25/07 06:55 AM	ABS Services	Created	1 Each of Catalog1	0.0(	
103	System Administrator	06/22/07 01:00 PM	ABS Services	Cancelled	2 Each of Holux GR 213 Sirf Star III GPS mouse USB PS2 GPS receiver for laptop notebook PDA IPAQ PALM DELL	113.9(	
102	System Administrator	06/22/07 12:53 PM	Internal Work Supplier	Sent	Environmentally Friendly New Product	0.00	
101	System Administrator	06/22/07 12:53 PM	ABS Services	Sent	1 Each of Apple MacBook Pro MA464LL/A 15.4" Notebook PC (2.0 GHz Intel Core Duo, 1 GB RAM, 100 GB Hard Drive, SuperDrive)	1,799.0(	
100	Employee Jack	06/22/07 09:16 AM	ABS Services	Cancelled	1 Each of HP LaserJet 1020 Printer (Q5911A#ABA)	132.9(	
99	Employee Jack	06/22/07 09:10 AM	ABS Services	Cancelled	2 Each of Palm Z22 Handheld	458.00	
98	Kalyani Katari (EMP)	06/22/07 07:23 AM	ABS Services	Cancelled	1 Each of Palm Z22 Handheld	229.00	
97	Kalyani Katari (EMP)	06/22/07 07:23 AM	BZen	Sent	1 Each of Power PC	100.00	
96	John Williams	06/21/07	ABS Services	Sent	1 Each of Apple MacBook Pro MA463LL/A 15.4"	2,199.0(	

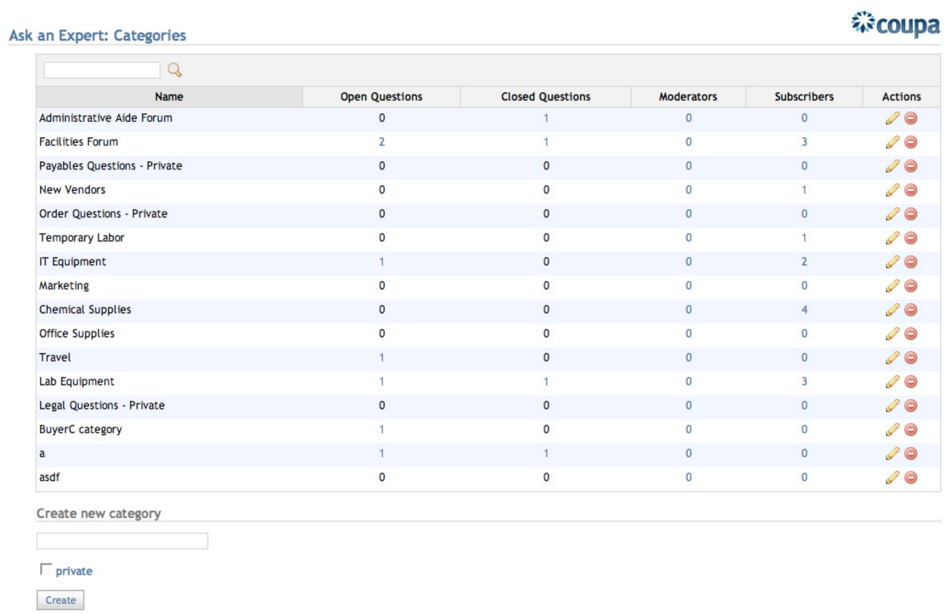
Changing and Cancelling a Purchase Order

From the list of purchase orders, you may be able to change or cancel an order. The green "U-turn" icon is for cancelling. If you click it, you will be asked to confirm that you wish to cancel the purchase order. If you agree, the purchase order will be changed to “Cancelled” status and the supplier will receive an email that the PO has been cancelled.

If you wish to change a purchase order, you can click the “Edit” icon. You will be able to modify the quantity ordered, the price or amount of the line, delete a line, change the need-by date, add attachments and add comments. When you click submit, the purchase order will be revised and the supplier will receive an updated order. There are certain conditions that will prevent the order line from being modified, such as if the line has already been received.

Maintaining Ask an Expert

Ask an Expert provides you with an easy way to post questions, receive help and share knowledge in the organization. The buying department sets up Ask an Expert categories, so that people can funnel their questions to knowledge experts in the organization. To setup and maintain Ask an Expert, click on the "'Ask an Expert' categories" link on the buyer administration page. A sample Ask an Expert maintenance page is shown below:



Name	Open Questions	Closed Questions	Moderators	Subscribers	Actions
Administrative Aide Forum	0	1	0	0	
Facilities Forum	2	1	0	3	
Payables Questions - Private	0	0	0	0	
New Vendors	0	0	0	1	
Order Questions - Private	0	0	0	0	
Temporary Labor	0	0	0	1	
IT Equipment	1	0	0	2	
Marketing	0	0	0	0	
Chemical Supplies	0	0	0	4	
Office Supplies	0	0	0	0	
Travel	1	0	0	0	
Lab Equipment	1	1	0	3	
Legal Questions - Private	0	0	0	0	
BuyerC category	1	0	0	0	
a	1	1	0	0	
asdf	0	0	0	0	

Create new category

private

Create

Creating Categories

Ask an Expert categories provide a mechanism to classify a newly posed question. There is no limit on the amount of categories, but it should be understandable to the end-user. Some examples of categories:

- Commodity categories - e.g., office supplies, lab equipment
- Process categories - e.g., vendor setup, returns
- Object categories - e.g., requisition questions
- People categories - e.g., facilities group, administrative aide group
- Other

To create a category, type in the new category name in the "Create new category" section at the bottom of the screen. If you would like this to be a private category, check the appropriate box. Private categories are special in that end-user can only post questions and see responses to their own questions. They cannot search or view other people's questions. This is helpful for having sensitive conversations. Click "Create" to create the category. The new category appears in the list at the top of the screen.

Maintaining Categories

For existing categories, buyers can change the name of the category, view open and closed questions, and maintain subscribers and moderators. To edit a name, put the cursor on top of the category name. The category becomes highlighted in yellow. By clicking your mouse, the name becomes editable. Type in the new name and click "ok". The number of open and closed questions is listed next to the category name. To view the questions, click on the appropriate link.

Subscriptions enable a user to easily view questions in a particular category, as well as to receive all questions and answers posted via email. To view who has subscribed to a particular category, click the link with "[number] subscribers". The usernames of the subscribers will be listed. Subscriptions are self-service, so you can subscribe to the category themselves. However, if you wish to add a new subscriber to a category, use the drop-down list and pick the appropriate user and click "Subscribe". Since end you cannot subscribe to private categories, this is the only way to name subscribers for private categories. This could be useful in cases where you want a group of people reviewing certain sensitive questions. For example, you may want a few people to handle questions regarding vendor performance problems.

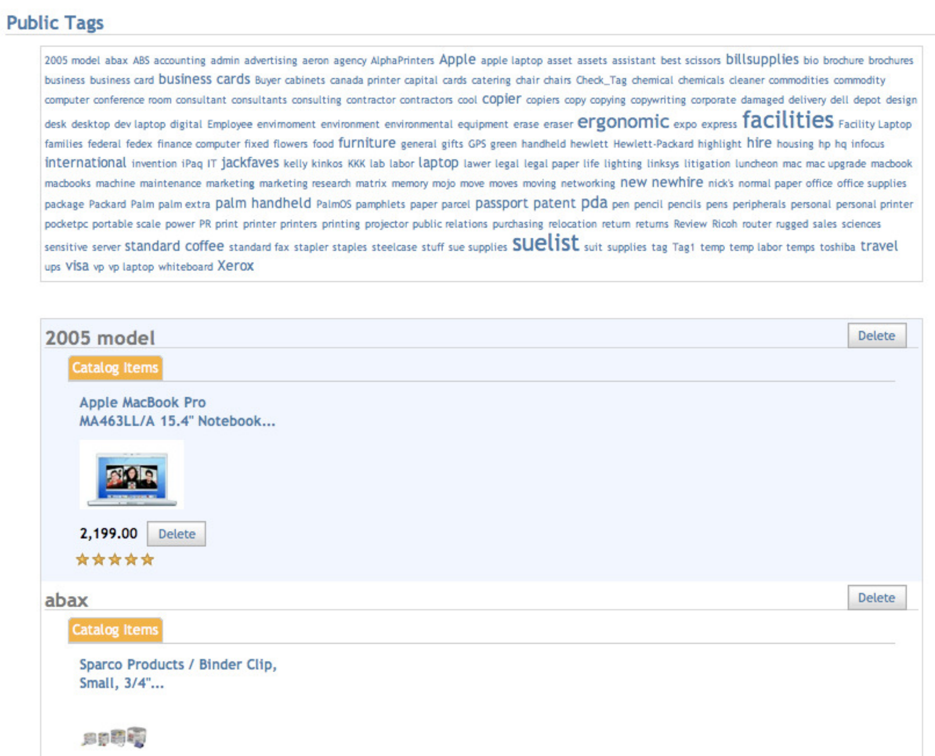
Moderators are similar to subscribers at this point. It is intended that a moderator oversees a particular Ask an Expert category and ensure that questions are being answered properly.

To delete a category, click the "-" icon. The system asks for confirmation before deleting. The category will no longer be available; however existing questions/answers in that category remain in the knowledgebase.

Maintaining User Created Content

End-users create tags and employee reviews. Tags improve searchability, knowledge sharing, "favorites lists" and other uses. Through the buyer administration panel, the buyer can view the tags and make deletions as necessary. To access the tag administration screen, click "Public tags" link from the buyer administration page.

On the top of the tag administration page, you see a tag cloud of all tags in the system. To find a particular one, do a browser search. By clicking on a tag in the tag cloud, you are taken to the particular tag and all items, policies and Punchout sites associated with the tag. The associations are called taggings. To delete a particular tag, click the "Delete" button that is located on the same level as the tag name but on the right side of the page. A deletion deletes the tag and all associated taggings. If you want to simply remove one or more taggings and keep the tag, click the "Delete" button next to the appropriate catalog item. At this time, taggings of Punchout sites and policies cannot be deleted from the tag administration page.



Employee reviews provide feedback on the particular item that an employee has ordered. It helps others in the organization, as well as the buying department, make better decisions over time. If a user sees an employee review that he/she believes is offensive or objectionable, it can be reported. You can see a list of all reported employee reviews by clicking on the "Reported product reviews" link on the buyer administration page. In the list, you see the Item that was reviewed, the text of the reported review, the author of the reported review and the person who reported the review. If the review is deemed inappropriate, click on the "Remove Review" link in the Actions column. If the review is deemed to be "ok", click "Dismiss Complaint".

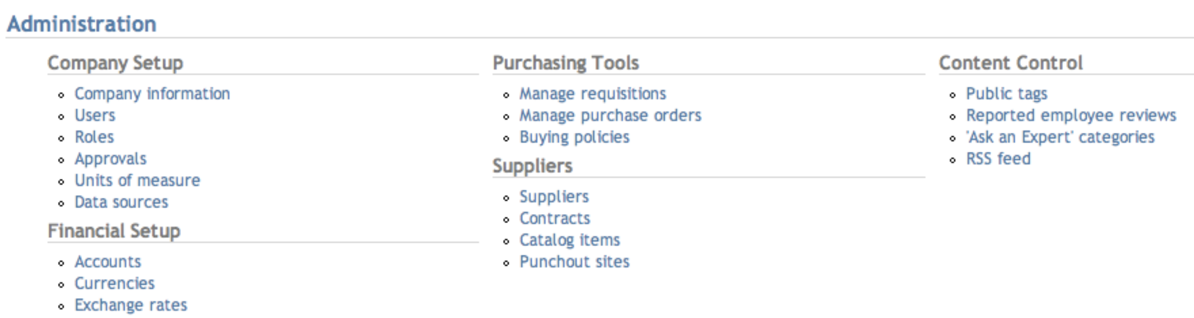
System Administrator Guide

System Administrator Overview

Users who are assigned the system administrator role have full access to all capabilities of the system. Specific tasks are more appropriate for this role and are not available to the end-user or buyers. The system administrator is responsible for setting up key information as part of the implementation and ensuring that this information is kept up to date. The system administrator is able to manage users, roles, RSS feeds, Punchout sites and more.

General Navigation for System Administrator

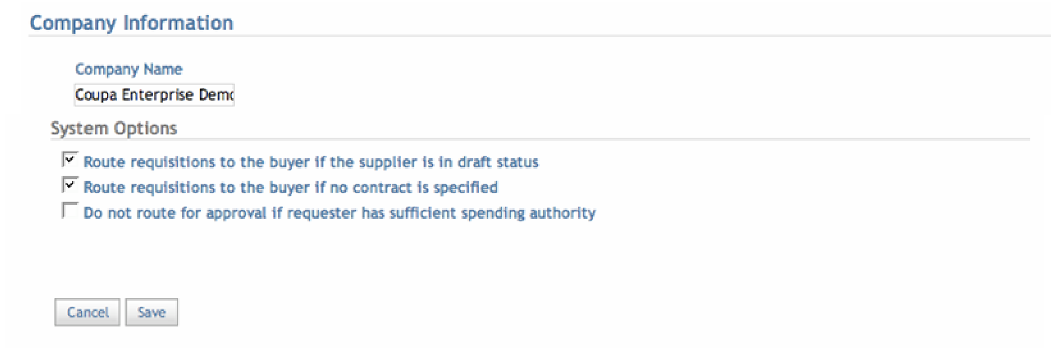
The system administrator can access these additional capabilities by clicking the Admin link in the global toolbar. At this point, you, as the system administration, see the Administration console.



The information is organized into various sections to greater ease of use.

Company Overview

This section is used for your company default settings, including basic company data, and system options. At the top of the page, enter in your company name which will be used in email notifications, purchase orders and elsewhere.



Setting System Options

There are 3 system options available on the Company Information page.

1. Route requisitions to the buyer if the supplier is in draft status. Uncheck this box if you do not want your buyers to approve any new supplier requests.
2. Route requisitions to the buyer if no contract is specified. Uncheck this box if you do not want your buyers to review any requisition for one-time items or other requests that do not have a valid contract associated with the request.
3. Do not route for approval if requester has sufficient spending authority. (Self-Approvals) Uncheck this box if you want a manager to always approve a requisition even if the requisitioner has an approval limit that is higher than the requisition total.

Units of Measure

The system administrator controls which units of measure are available to your employees. The most common measure is “Each”, which comes pre-seeded. To add additional units of measure, click the New UOM button and enter a name, a code and a precision. The code should be short. Precision sets how many numbers after the decimal point are allowed in the quantity field for that particular unit of measure. A precision of “0” indicates that the quantity must be an integer. A precision of “2” would allow 2 decimal places (e.g., 5.72) as the quantity.

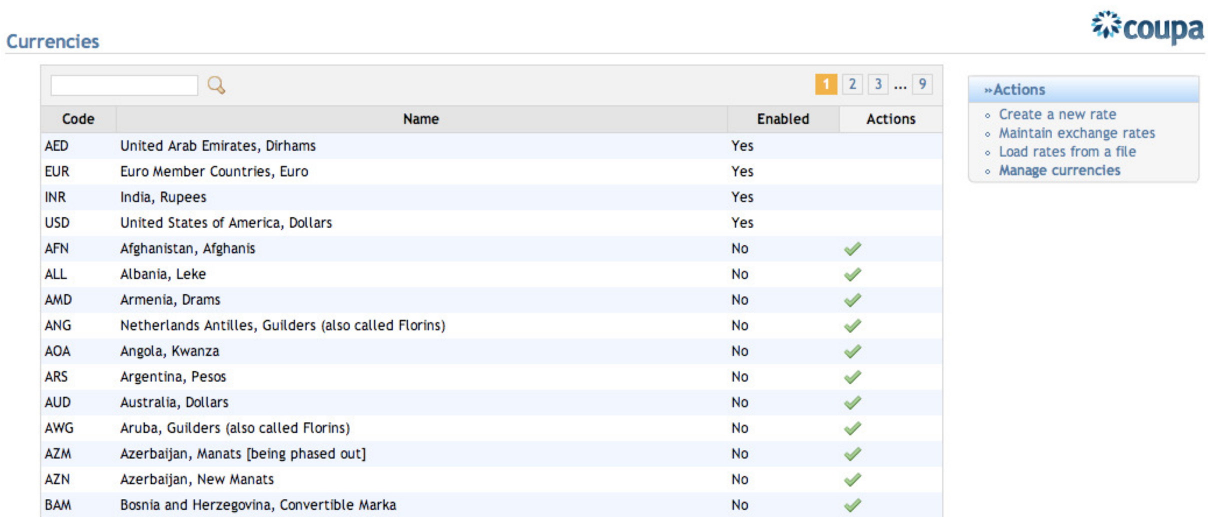
Units of Measure

Code	Name	Allowable Precision	Actions
EA	Each	0	
BX	Box	0	
PK	Pack	0	
RM	Ream	0	
CS	Case	0	
CT	Carton	0	
DZN	Dozen	0	
TU	Tube	0	

New UOM

Currencies and Exchange Rates

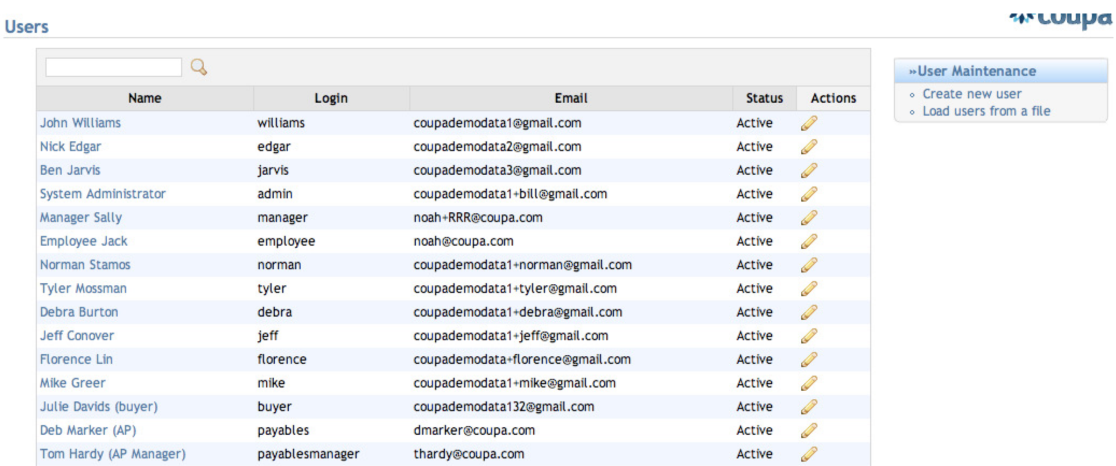
Your Coupa system comes pre-seeded with all of the major currencies. From the Currencies page, you can enable additional currencies by clicking the “Check” mark in the actions column. Exchange rates allow the system to convert one currency to another. If you have enabled more than one currency, a user can create a requisition across multiple currencies. The transaction on the requisition is the “transactional currency”. The initial currency will be based on the user’s preference. If the approver of the requisition has a different preferred currency, he or she will see the approval notification in the preferred currency as opposed to the transactional currency, so that the approver can quickly understand how much he or she is approving. After approvals, the system issues purchase order(s) in the transactional currency.



Code	Name	Enabled	Actions
AED	United Arab Emirates, Dirhams	Yes	
EUR	Euro Member Countries, Euro	Yes	
INR	India, Rupees	Yes	
USD	United States of America, Dollars	Yes	
AFN	Afghanistan, Afghanis	No	✓
ALL	Albania, Leke	No	✓
AMD	Armenia, Drams	No	✓
ANG	Netherlands Antilles, Guilders (also called Florins)	No	✓
AOA	Angola, Kwanza	No	✓
ARS	Argentina, Pesos	No	✓
AUD	Australia, Dollars	No	✓
AWG	Aruba, Guilders (also called Florins)	No	✓
AZM	Azerbaijan, Manats [being phased out]	No	✓
AZN	Azerbaijan, New Manats	No	✓
BAM	Bosnia and Herzegovina, Convertible Marka	No	✓

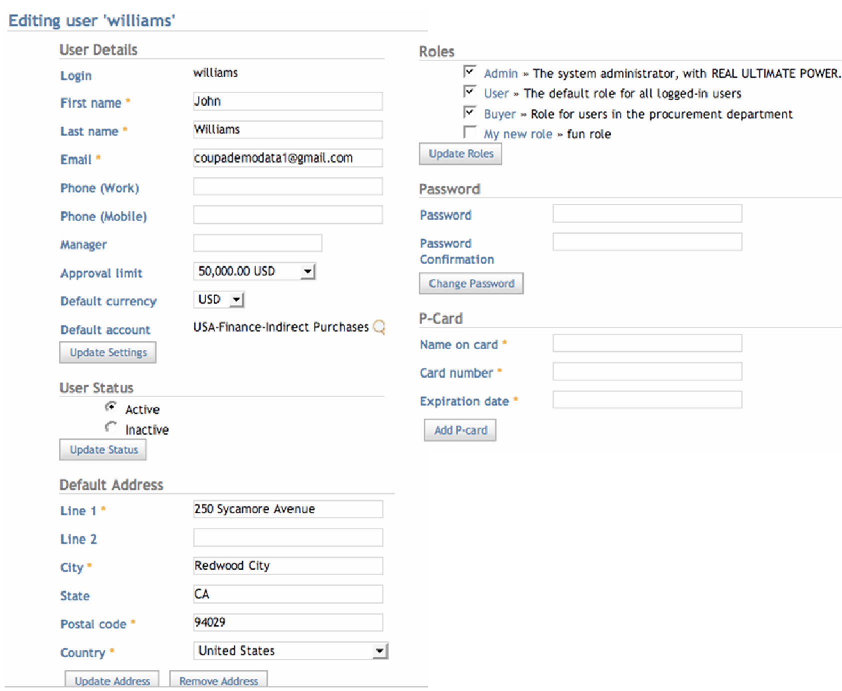
User Management

The system administrator governs access to the Coupa application. You can add, modify and delete access rights via you management screens. These screens are accessed via the System Administrator administration screen and clicking "Users". At the main user management screen, the you can view and search existing users of the system.



Name	Login	Email	Status	Actions
John Williams	williams	coupademodata1@gmail.com	Active	
Nick Edgar	edgar	coupademodata2@gmail.com	Active	
Ben Jarvis	jarvis	coupademodata3@gmail.com	Active	
System Administrator	admin	coupademodata1+bill@gmail.com	Active	
Manager Sally	manager	noah+RRR@coupa.com	Active	
Employee Jack	employee	noah@coupa.com	Active	
Norman Stamos	norman	coupademodata1+norman@gmail.com	Active	
Tyler Mossman	tyler	coupademodata1+tyler@gmail.com	Active	
Debra Burton	debra	coupademodata1+debra@gmail.com	Active	
Jeff Conover	jeff	coupademodata1+jeff@gmail.com	Active	
Florence Lin	florence	coupademodata+florence@gmail.com	Active	
Mike Greer	mike	coupademodata1+mike@gmail.com	Active	
Julie Davids (buyer)	buyer	coupademodata132@gmail.com	Active	
Deb Marker (AP)	payables	dmarker@coupa.com	Active	
Tom Hardy (AP Manager)	payablesmanager	thardy@coupa.com	Active	

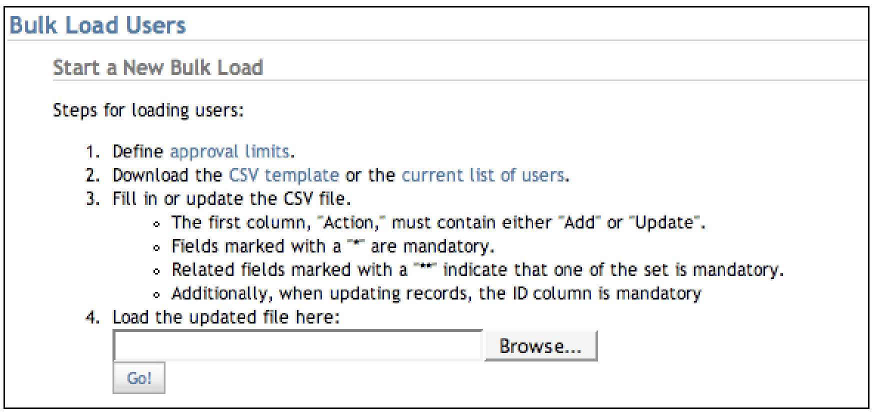
To view the details of a particular user, click the Details icon. To modify the existing user, click the pencil or Edit icon. When in edit mode, you can change the first and last name of the user, approval limits, manager, password and roles. To inactivate a user, edit the user and change his/her status to inactive. This process end-dates the user, removing his/her access privileges. It does not delete the user from the database.

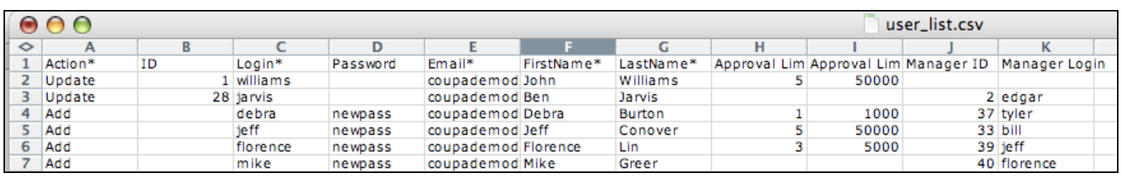


Adding Users

Users can be added and maintained via the online interface or the bulkload process. To create a user via the online interface, click "Create a new user" link on the main user management screen. Populate all information and click "Create User". All new users are created with the role of “User”. See the Role Management section of this documentation for more information.

The bulkload process is helpful for loading up or modifying many users in a single step. To access the functionality, click the "Load you from a file" link on the main user management screen. Follow the steps on the bulkload page. A CSV template is provided as a sample load of user. Additionally, you can download a CSV file containing the current list of users. New users are loaded by entering "Add" in the Action column of the CSV file. To update a user, enter "Update" in the Action column and enter the UserID in the ID column. Use the "Browse" button to pick the CSV file that needs to be loaded and click "Go!” The load status is visible and all errors are reported in the Data Sources section of the application.   Below are the bulkload screen and an image from a sample CSV file for user update and add.





user_list.csv

	A	B	C	D	E	F	G	H	I	J	K
1	Action*	ID	Login*	Password	Email*	FirstName*	LastName*	Approval Lim	Approval Lim	Manager ID	Manager Login
2	Update	1	williams		coupademod	John	Williams	5	50000		
3	Update	28	jarvis		coupademod	Ben	Jarvis			2	edgar
4	Add		debra	newpass	coupademod	Debra	Burton	1	1000	37	tyler
5	Add		jeff	newpass	coupademod	Jeff	Conover	5	50000	33	bill
6	Add		florence	newpass	coupademod	Florence	Lin	3	5000	39	jeff
7	Add		mike	newpass	coupademod	Mike	Greer			40	florence

Role Management

Role Management gives the system administrator the ability to grant specific privileges or permissions to you. You establish roles and then assigns one or more roles to a user. If a user has more than one role, he/she can access any function that is allowed in the individual roles (superset of the roles). At current time, four roles are seeded in the system:

1. Admin - Full access to all functionality for the system administrator
2. Buyer - Set of functionality that is appropriate for people in the procurement department
3. User - Default role and one that is typical for end you that need to create/approve requisitions
4. Guest - Implicit role and just for access to login page

To view the current set of permissions for a role, click the "Show" link associated with the role on the role management page. To edit the permissions, click the "Edit" link. The seeded roles cannot be deleted, but all other roles can be deleted by clicking "Delete" button. Take necessary precaution before deleting roles.

Creating a Role

New roles can be created to assign appropriate permissions to you in the organization. To create a role, click the "New Role" link. The system asks for a name of the role and description. After entering that information, you should click the "Edit" link to assign the appropriate permissions to the newly created role. Permissions are grouped according to the type of permission (e.g., Contracts, Tags, etc.). To grant a permission, click the checkbox associated with the individual permissions. When done with adding all permissions, click the "Save" button.

Approvals

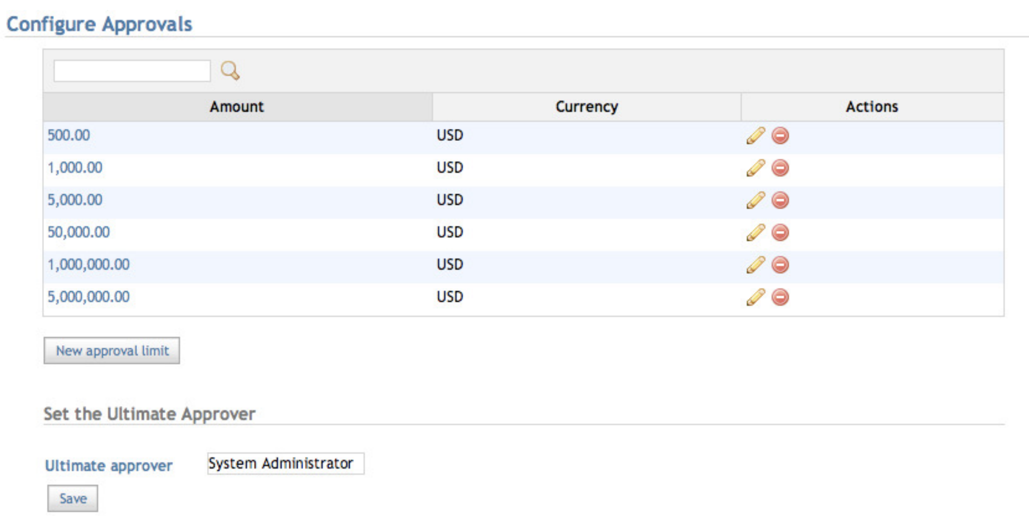
There are several ways that requisition approvals are handled in the system. You can use all three of these methods to design the appropriate approval path for your company's requisitions.

1. Approval limits based on managerial hierarchy
2. Ultimate approver
3. Self-approvals

Approval Limits Based on Managerial Hierarchy

Approval limits are assigned to each user to indicate their approval authority. The approval limit is a value (e.g., dollar value). When a requisition is submitted, the system generates an approval path based on the management hierarchy and the approval limits. The requisition goes to the manager of the person who submitted the requisition. If he/she approves it and has approval authority above the requisition total, then the requisition is approved. If he/she approves it but does not have approval authority above the requisition total, then the requisition needs approval from additional people. If a user does not have any approval limit, then his/her approval limit is assumed to be 0.

Typically, approval authority is determined by the person's HR level in the organization. However, certain positions may justify an increased or decrease approval authority. The approval limits page is accessed by clicking "Approval limits" link from the system administrator console. Here is a sample list of current approval limits.



To edit an approval limit, click the pencil icon and change the value as appropriate. All users that are associated with this limit have their approval authority changed. To delete an approval limit, click the "minus" icon. By clicking on the details icon of a particular approval limit, the administrator can see all the users associated with that limit. If necessary, you can click the edit icon to change the approval limit of a specific user.

Ultimate Approver

The system administrator must assign an ultimate approver that is responsible for approving all requisitions where the system cannot determine the appropriate approver. Examples of where the system may use the ultimate approver:

- The CEO of an organization does not have a manager, so all of his/her requisitions go to the ultimate approver
- The requisition value is above all established approval limits

To select an ultimate approver, pick the appropriate user name from the drop-down.

Self-Approvals

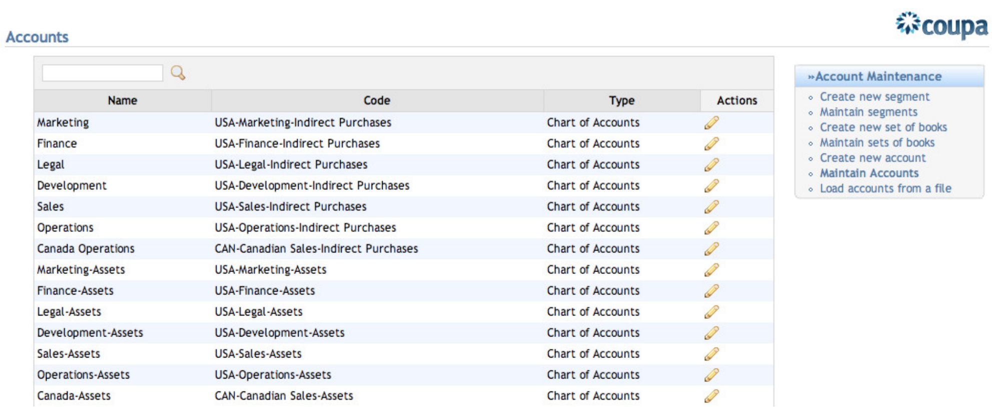
If you would like a requisitioner to be able to approve their own requisitions if it is below their spending authority, then check the "Do not route for approval if requester has sufficient spending authority" box on the System Options of the Company Information page. If it is checked and the requisition has a greater approval limit than the requisition they are submitting, the requisition will be approved immediately on submission. However, if the company has established a special approver that needs to approve the requisition based on the billing/account information, then the requisition will travel to the special approver(s) for review.

Special Requisition Routing Configuration

In the Company Information page, the system administrator can modify certain standard requisition routing rules. By default, all requisitions that have a requisition line where the supplier is in "Draft" status (e.g., a new supplier request) or the requisition line has no contract associated with it (e.g., a one-off purchase or non-catalog requisition entered in the Quick Order Entry) is immediately forwarded to the buyer upon requisition submission. If you uncheck the standard requisition routing rules, a requisition is forwarded for management approval without ever going to the buyer's requisition pool. Please change these parameters with caution, as requisitions are created into purchase orders will be sent to the vendor without any buyer oversight.

Accounting

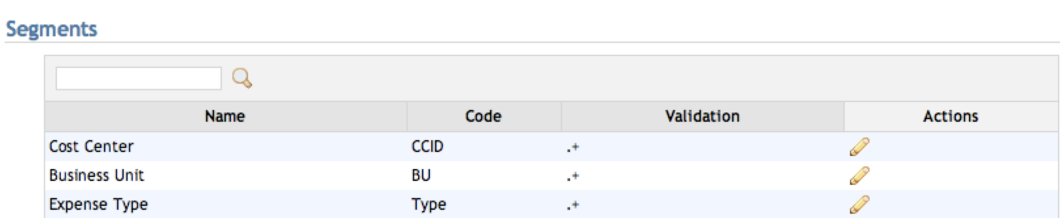
Coupa's accounting functionality provides a method for billing the appropriate account (typically a GL account) for the requisition. Each requisition must have an account in order for it to be processed. The accounts available to the end user are based upon the accounts loaded into the system by the administrator. To access the account management screens, click the "Accounts" link on the system administrator console. The main account page shows a list of all current accounts. Each current account can be modified or deleted and new ones can be added. Accounts are associated with a specific Set of Books and are comprised of between 1 and 20 account field types. Each of these elements are explained in this section. A sample list of accounts and the main account management screen is shown below.



Name	Code	Type	Actions
Marketing	USA-Marketing-Indirect Purchases	Chart of Accounts	
Finance	USA-Finance-Indirect Purchases	Chart of Accounts	
Legal	USA-Legal-Indirect Purchases	Chart of Accounts	
Development	USA-Development-Indirect Purchases	Chart of Accounts	
Sales	USA-Sales-Indirect Purchases	Chart of Accounts	
Operations	USA-Operations-Indirect Purchases	Chart of Accounts	
Canada Operations	CAN-Canadian Sales-Indirect Purchases	Chart of Accounts	
Marketing-Assets	USA-Marketing-Assets	Chart of Accounts	
Finance-Assets	USA-Finance-Assets	Chart of Accounts	
Legal-Assets	USA-Legal-Assets	Chart of Accounts	
Development-Assets	USA-Development-Assets	Chart of Accounts	
Sales-Assets	USA-Sales-Assets	Chart of Accounts	
Operations-Assets	USA-Operations-Assets	Chart of Accounts	
Canada-Assets	CAN-Canadian Sales-Assets	Chart of Accounts	

Segments

Segments are the individual elements of a multi-part account string. Segments are the first step in creating the accounting structure. Each segment has a name, code and regular expression validation. In the example below, four segements have been defined: Cost Center, Business Unit, Expense Type and Project.

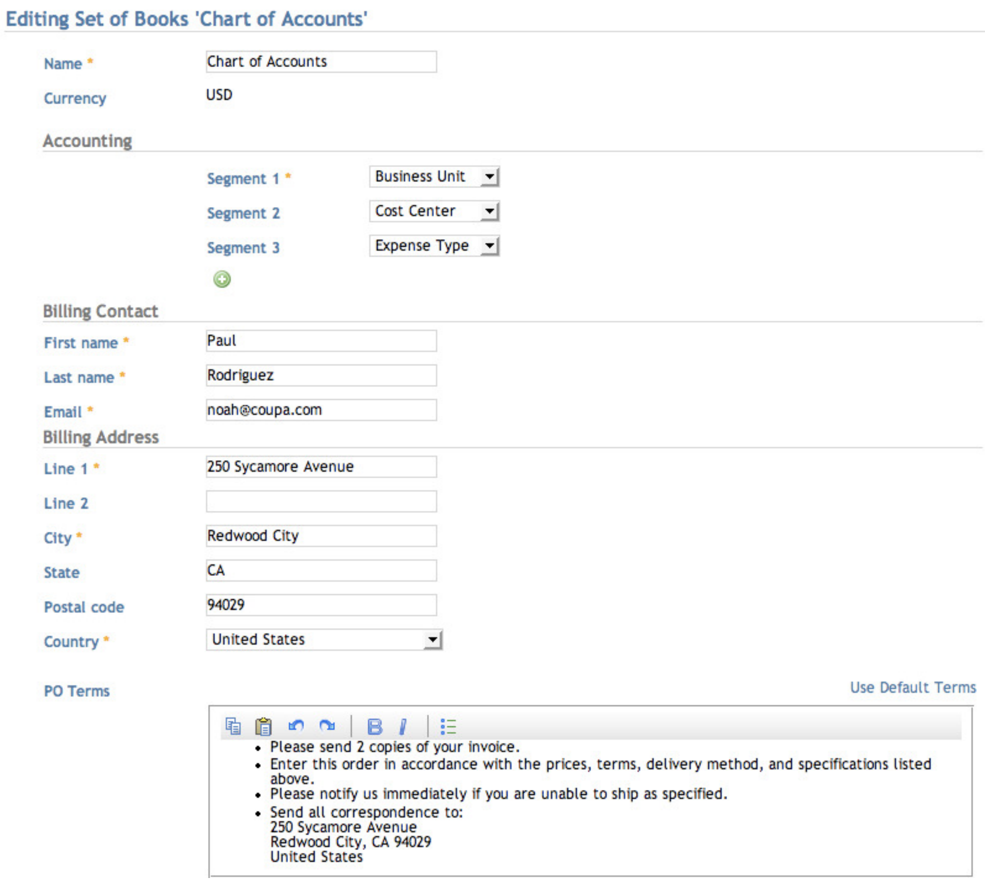


Name	Code	Validation	Actions
Cost Center	CCID	.+	
Business Unit	BU	.+	
Expense Type	Type	.+	

To enter a new segment, click the "Create a new segment " link. Enter the name, code and the validation rules. You can set the validation to require that accounts be any character, alphanumeric (any number or letter), any character, numeric, alphabetic or other regular expression.

Set of Books

Set of Books provide a structure for the accounts and the billing information for your purchase orders. Coupa Procurement supports multiple Set of Books, often needed by larger enterprises or multinationals. After the segments are created, the Set of Books is defined and can be comprised of 1 to 20 segments. To create a new Set of Books, click the "Create a new Set of Books" link. Enter in the Set of Books name and pick the segments. In the example below, the administrator is creating an Set of Books with the name of "USA Set of Books" and picked Business Unit (Segment 1), Cost Center (Segment 2) and Expense Type (Segment 3). All other segments are empty.



Below the account structure setup, you establish the billing information which will be represented on purchase orders. You enter in the bill-to contact (from your AP department), bill-to address and any boilerplate information that you would like included on your purchase orders. The WYSIWYG editor makes it easy to create your boilerplate text. Of course, if you have multiple Sets of Books, you can have a separate bill-to contact, bill-to address and boilerplate information for each Set of Books.

When viewing the current list of Set of Books, click the "pencil" to edit. To delete it, click the minus icon. Please use necessary caution when deleting. You can create more than one Set of Books, each having multiple accounts. This can be used to represent different operations of the business or organization.

Accounts

After segments and Set of Books are defined, you can manage the actual accounts that the requisitioners use. You create the accounts via the online interface or bulkload accounts from a file. To create a new account via the online interface, click "Create a new account" link. Pick the appropriate Set of Books (if more than one has been established) from the list in the drop-down. Once the Set of Books is selected, the screen refreshes and lists the valid segments. You should enter in the appropriate values and click the "Save" button. The system checks the values entered against the regular expression validation for each segment. If validation fails, you will receive an error.

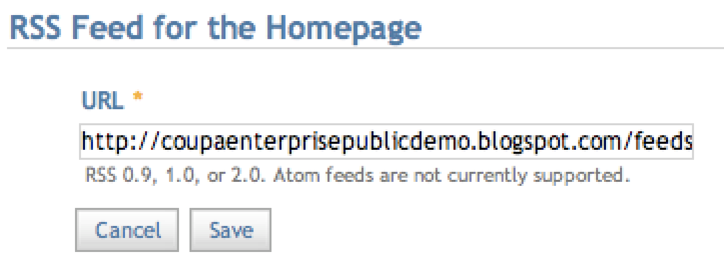
The bulkload process is effective for initial account loads, synchronization and mass updates. To access the bulkload accounts page, click the "Load accounts from a file" link. A CSV template is provided to guide the administrator and the list of current accounts can be downloaded. To create an account, enter "Add" in the Action column of the CSV file. To modify an existing account, enter "Update" in the Action column and put the appropriate Account ID in the ID column of the file. When ready to load, click the "Browse" button and select the appropriate file. Click "Go!" to start the bulkload. The system shows a status of the bulkload and takes you to the Data Sources page to view the success or failure of the account bulkload. All errors are reported and available in a CSV output.

When viewing the list of current accounts, you can edit an account by clicking the "pencil" icon or delete the account by clicking the "minus" icon. Please use necessary caution when deleting.

RSS Feeds

The RSS capability of the Coupa Procurement allows the purchasing department to easily keep the end-users up to date on the latest news from the department. The purchasing department authors a feed or "blog" of the latest news and the information is syndicated to the Coupa home page. All blogging applications have the ability to syndicate their feeds via RSS, or Real Simple Syndication.

To set the RSS feed to appear on the home page, click the "RSS feed" link from the system administrator console. On the subsequent page, enter the name and the appropriate URL of the appropriate RSS feed. The last 4 or 5 articles from the RSS feed appears on the user's home page. If you do not want to take advantage of this feature, just clear any value from the URL field and click the Save button. The “Recent News” area will disappear from all users’ homepage.

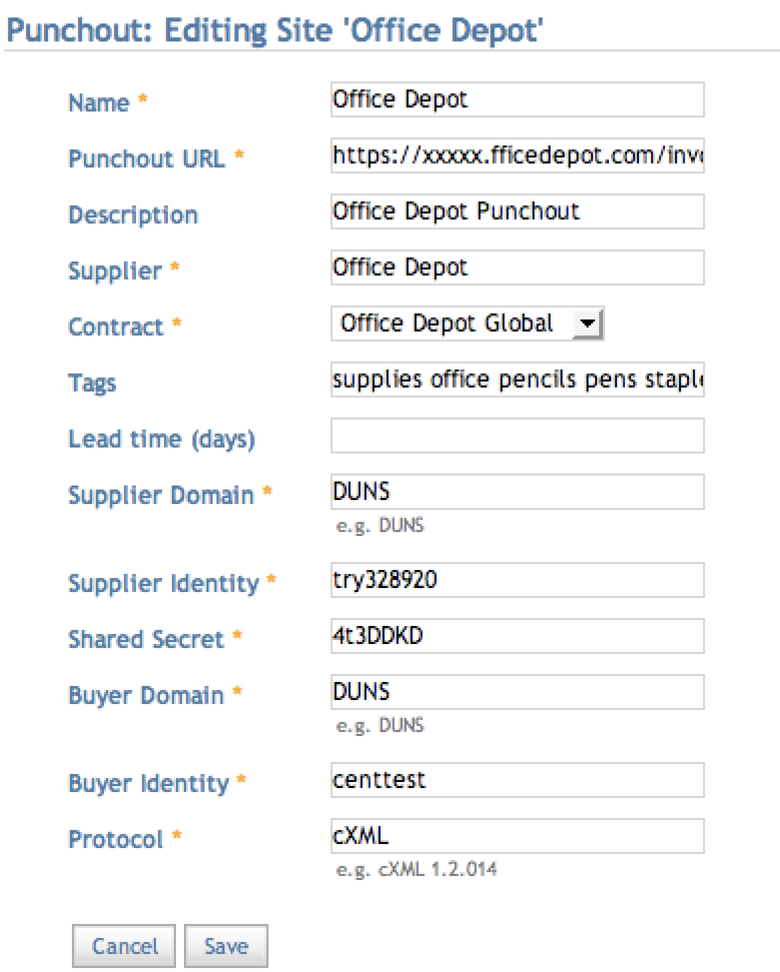


Punchout Setup

The Punchout process enables an end user to shop on an external website for their goods/services and bring the items back into his/her Coupa shopping cart for the final checkout. Organizations often employ Punchout when the catalog size of a vendor is large (e.g., office supplies) or is very dynamic (e.g., computer equipment). If a vendor supports the Punchout protocol (Coupa supports the cXML.org protocol), the setup is done by clicking on the "Punchout sites" link on the system administrator page. You view the list of current Punchout sites. To edit a site, click the "pencil" icon. To execute a test of the site, click the "wrench" icon. Deleting a site is accomplished by pressing the "minus" icon.

Creating a Punchout Site

To create a new Punchout site, click "New Site" link. The administrator enters the information that describes the specific Punchout site, including all identities and shared secrets as defined by the cXML protocol. Appropriate tags should be entered that enable the Punchout site to be displayed in the search results for the end user. In addition, all Punchout sites will show up in the Quick Access area of the end-user’s home page. A sample entry screen for a new site is shown below.



Data Sources

On the Data Sources page, the system administrator can view the status of file uploads. Successfully completed uploads are marked by “Done” in the status column. If errors have occurred during the upload, you can click on the error link to view the rows in the file that caused errors. Most file uploads begin immediately if the background loader system process is running. However, if the loader was not running when the upload was submitted, you can resubmit the upload through the Data Sources table. Additionally, the data sources table shows the files that were used for all uploads, and you can open those files.

Data Sources

1 2

Type	Contains	File	Created At	Status	Actions
	Budgets	budget_line_list.csv	October 19, 2006 22:14	Done	
	Accounts	account_list.csv	October 19, 2006 22:06	Done	
	Catalog items	canadaofficesupplies2.cif	September 18, 2006 05:38	Done	
	Catalog items	canadaofficesupplies.cif	September 18, 2006 05:03	Done	
	Catalog items	canadaofficesupplies.cif	September 17, 2006 06:06	Done	
	Catalog items	canadaofficesupplies.cif	September 17, 2006 05:58	Done	
	Catalog items	canadaofficesupplies.cif	September 17, 2006 05:44	Done	
	Catalog items	chemicalload.cif	September 17, 2006 05:13	Done	
	Catalog items	template.cif	September 17, 2006 01:54	Done	
	Catalog items	noah.cif	September 17, 2006 00:02	Done	