eProcurement Express Getting Started Guide

July 2007

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Getting Started Guide

This document will take you through the setup activities for your Coupa Express Open Source implementation. This guide is intended for use after you have installed the application on your server. For install instructions, please see the Installation Guides available from SourceForge.net. There are 13 steps included in this manual, however several of these steps are optional. For complete explanation of specific features, we recommend that you refer to your Coupa Express Edition User Guide.

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 Wiki ticket tracking system.

Step 1: Accessing Your Environment

Before beginning this guide, you must have installed Coupa Express properly. For complete instructions, see the Coupa Wiki. As pat of that process, you should have a URL for the login page of the application.

- Open your Internet Explorer or Firefox browser and navigate to the URL for the login page of the application.
- Login with a username of “admin” and password of “welcome”. Please note that these are case-sensitive.
- Click “Sign On” to reach the Coupa Homepage.
- Click the “Admin” link in the toolbar at the top of the page to access the Administration Console, which will allow you to do all of your setups.

Step 2: Company Information

From the Administration Console, click the Company Information link. From this point forward, this navigation will be described as:

“Administration console → Company Information”

- Enter your company name (this will be printed on your Purchase Orders)
- Set system options:
    - Route requisitions to buyer if supplier is in draft status (Recommended: Keep this box checked).
    - Route requisitions to buyer if no contract is specified (Recommended: Keep this box checked). If this is unchecked, then even one-time requests will not be sent to the buyer’s pool for review.
    - If you want a user to be able to “approve” his/her own requisitions, then check the box for “Do not route for approval if requester has sufficient spending authority”. For example, if Joe has a $10,000 approval limit, he can put in his own requisition for $9,000 and it will be immediately approved.

Step 3: Currencies and Exchange Rates

Your Coupa environment comes pre-seeded with all common currencies. However, only USD is enabled when you get the system. You can enable additional currencies, but this action is permanent, so proceed with caution. To enable additional currencies:

- Administration Console → Currencies
- Click the “Check” mark in the Actions column of the currency that you want to enable. The system will ask you for confirmation.
- You can setup exchange rates between the enabled currencies. This can be created via Administration Console → Currencies → Create a new rate or Administration → Exchange Rates

Step 4: Accounting - Chart of Accounts / Set of Books

The accounting structure is a very important setup step for the system. It will assist in reporting and integrating to your Financials system. It is recommended that you have the same structure in Coupa that you have in your Financials system. If you have a 3-segment accounting structure, you probably should have 3 segments in Coupa. Additionally, you will probably want to have a subset or all of the actual accounts that are in your Financials system loaded into Coupa. If you do run multiples Set of Books, you can setup each one in Coupa.

- First step is creating your segments. Administration Console → Accounts → Create new segment
- Type in the segment name, a short code and a regular expression for validation of the data in the segment. For instance, if you set the expression to [A-Z]+, the data in that segment must be 1 or more capital letters. Click Save.
- Create as many segments as you wish (e.g.,. Dept – Cost Center – Expense Type)
- When you are done creating segments, Click Create New Set of Books.
    - Enter in all data for your new set of books
    - Currency will be the functional currency for that Set of Books. You can still create transactions in other currencies, but the functional currency will be used for reporting in that Set of Books
    - Pick the order of your segments
    - Add in a billing contact, address and email address that will be printed on the PDF PO issued to the supplier.
    - Type in any boilerplate information that you will want printed on each PDF PO issued from that Set of Books. You can use the default boilerplate terms by click the "Use Default Terms" link.
    - Save the information. If you have multiple Sets of Books, just repeat all the above steps to create additional segments and another set of books.
- While you can create accounts through the user interface, you will probably want to load your accounts via the Coupa spreadsheet loaders. Administration Console → Accounts → Load accounts from a file
- Follow the instructions on the page to create your spreadsheet file to import your accounts. You should download the CSV template to begin. Required fields are marked with an asterisk. If you are adding an account, you enter "Add" in the first column and leave ID blank (used when you "Update"). Name is an optional, but can be useful as a nickname for an account. The Account Type field should be the name of your Set of Books (or use the ID of that Set of Books). If you have a 3 segment Set of Books, then you need to enter values into Segment 1, Segment 2, and Segment 3. Add as many rows as you like, save the file in CSV format. Back on Coupa, pick your newly saved file using the Browse button and click "Go!". Your load should begin.
- You'll be taken to the File Upload Status page where you can see if any errors occurred. You can always check the load progress and errors of file uploads by navigating Administration Console → Data Sources.

Step 5: Units of Measure

In addition to "Each", you can use other Units of Measure.

- Administration Console → Units of Measure
- Click New UOM button
- Enter in a name, code (should be short), and precision. If you have a precision of 0, then the quantity must always be an integer. If you create a UOM with precision of 2, you could order a quantity of 4.28

Step 6: Approvals

The most common approvals are using the management hierarchy combined with spend authority (or approval limit). The first step is creating approval limits and then assigning those limits to users. If you created an approval limit of $10,000 and gave that approval limit to User ABC, User ABC would be able to approve requisitions up to $10,000.

- Administration Console → Approvals
- Click New Approval Limit
- Enter approval limit amount and currency
- Repeat to add more approval limits
- The “Ultimate Approver” receives approval notifications when the system cannot find a proper approver. For instance, if the requisitioner has no manager, it will go to the ultimate approver. If the requisition is for $1M and the last approver has spend authority of $100K, then it will go to the ultimate approver. By default, the system administrator is set to be the ultimate approver. It might be smart, that after you load in your users, you set the CFO to be the ultimate approver.

Step 7: Users

Loading users is the next critical step for your Coupa implementation. You can enter new users via the user interface, but you’ll probably want to use the spreadsheet loader.

- Administration Console → Users → Load users from a file
- Download the CSV template. Fill it out similarly to how you filled out the Accounts CSV file.
- Key columns:
    - Action: Add
    - Login: login name
    - Status: active
    - Password: initial password e.g., (welcome)
    - Email: email address
    - FirstName, LastName
    - Enter an approval limit ID (each approval limit is assigned an ID which can be easily seen by hovering over the approval limit and seeing the numbers at the end of the URL) or just typing in the Approval Limit (this must match an existing approval limit).
    - Manager ID or Manager Login. Since the CSV loader processes the rows in order, you must sequence the rows appropriately. If Tim reports to Sue who reports to Bill, then Bill must be loaded before Sue who must be loaded before Tim.
    - You’ll probably want to assign a user a default account, so enter the default account name or account code in the appropriate column. You can use quotes (“) if there are spaces in the account name, e.g,. “0010-3202-Marketing”.
    - Enter your Set of Books name in the Default Account Type Name column.
    - Roles: Coupa seeds the roles of User, Buyer and Admin. (Guest is only used to access the login page). We recommend that you do not modify the Coupa seeded roles, but you can add roles if necessary. Enter the role in the appropriate column of the CSV file. If the user has more than one role, separate the roles by commas, such as Admin, User, and Buyer.
    - Default Currency
    - To set a default shipping address for the user (e.g., their office location), enter in their street, city, state, zip code, country.
    - Other optional fields include p-card information and phone numbers
- After entering your data, save the spreadsheet as a CSV file locally, click Browse from the Coupa page and pick your file. Click “Go!” to start your upload

Step 8: RSS Feed

Coupa's RSS feed feature allows you to syndicate latest news to the user. Your RSS feed will show up on each user's homepage. If you leave it blank, then this section will not be shown to your users.

- Administration Console → RSS feed
- Enter in the URL of the RSS feed and click Save

Step 9: Suppliers

You will likely want to load your existing supplier list into Coupa.

- Administration Console → Suppliers → Load suppliers from a file
- Download the CSV template and fill it out
- Key columns:
  - Action: Add
  - Name: Supplier Name
  - Optional fields: Account Number,
  - Supplier Contact Person (printed on the PDF PO): Use the primary contact columns (e.g., Email, Name Given, Name Family and other optional fields)
  - Supplier Address (printed on the PDF PO): User the primary address columns
  - PO Method indicates the transmission method of sending POs to the supplier. Enter "email" or "none". If supplier accepts cXML POs, we recommend that you enter the values through the user interface and not the CSV file
- Save the file locally and upload it to Coupa using the same process as Accounts and Users

Step 10: How to Buy Policies

Coupa's How to Buy policies allow you to create a "policy manual" within the application. You may have policies for different categories of goods that people buy, different processes, etc. For instance, you may have a policy for ordering IT equipment. This is an optional step.

- Administration Console → Buying Policies
  - Click "New Policy" button
  - Enter policy name
  - Enter tags separated by commas. These tags will help users find the policy when they search. For instance, if you tag the IT Equipment policy with a term like "HP" and a user searches on HP computers, then they will see the IT Equipment policy in the search results.
  - Enter the text of your policy via the text editor. You should be able to cut and paste from other websites or documents if you have existing policies. The formatting and links of your existing policy should be saved, but Coupa is not responsible for the format of your policies.
  - Click "Create" button to create the policy
- We also recommend that you create a "default" policy that will be displayed when a user enters a search that finds no catalog items. It might be a policy that includes general information, a list of commodity owners, etc. to help the user. Create the policy and then set the default policy using the drop-down on the Buying Policies page.

Step 11: Contracts / Catalogs

Contracts define your relationship with your supplier. Catalogs, Web Forms and PunchOut sites get related to a supplier via the contract. While this is an optional step, it is highly recommended that you define contracts to increase the amount of automation. All requisitions that have a contracted item or service on it can be processed without buyer intervention.

- Administration Console → Contracts
- Click "New contract" button
- Key fields:
  - Name / description of the contract
  - Contract number which must be unique
  - Start and End Date of contract
  - Supplier
  - Optional Bill-To address. If this is left blank, it will use the bill-to on the Set of Books
  - Attachments including the legal agreement can be stored on the contract
  - If you would like to load a catalog with this contract, there are 2 methods:

    1. Use the CIF format (which is a little more complex than CSV format). From the create contract page, download the CIF catalog template. It should be opened in a text editor. Each catalog must be specific to a currency, while each catalog line has a Supplier Part ID, Item Description, Unit Price, Unit of Measure and Short Name. If you have an image, you can supply the URL of the image. When you load the catalog, the system builds the catalog items, including fetching the image based on the URL that you have given.
    2. Use the CSV format (easier). Complete this contract page. Then go Administration Console → Catalog Items. From there, you can create a new catalog item through a CSV file load or even typing in the catalog items individually. Note that you must enter in a contract ID or contract number, since each catalog item MUST be associated with a contract.

  - You can mark a catalog as preferred to have it available in the drop-down on the quick access links on the user's homepage.
  - You can "Save" a contract which keeps it in draft status and not usable. If you click "Save and Publish", the contract and any associated catalog items are made available to the users.

Step 12: PunchOut Sites

To start doing PunchOut with your supplier (typically the large vendors of office supplies, technology, industrial supplies, lab equipment, etc.), the first step is to contact the vendor and explain that you want to use PunchOut to order from them. They'll provide you with a PunchOut URL, an "identity" and a shared secret. When you execute a PunchOut to the supplier, these elements allow the supplier to identify your company. Since they know "who you are", they can display your company's contract prices, contracted items, etc. This is an optional step.

- Administration Console → PunchOut sites → New Site button
- Enter in the information required, including Name, PunchOut URL (from your supplier), Supplier, Contract
- The Supplier and Buyer Domain will likely be DUNS
- Buyer Identity and Shared Secret
- Click Save

Step 13: Ask an Expert

Coupa's Ask an Expert feature provides simple Q&A forums for users to pose questions and receive answers. Coupa's Ask an Expert allows you to define "categories" (e.g., forums) that people post questions to. This is an optional step.

- Administration Console → 'Ask an Expert' Categories
- Type in the Category name. You may want to create categories for major groups of commodities (e.g., questions about Telecommunications Equipment) and/or categories for processes (e.g.,. questions about New Vendors)
- If you want users to be able to post questions but make those questions only visible to specific users, mark the category as private. An example of a private category may be "Supplier Complaints".
- For each category, you should assign a moderator to the category. He or she is someone that will receive all questions posed to the category and respond quickly. In addition, any user that subscribes to the category can also answer questions.