Coupa eProcurement
User Guide

Open Source Edition - Release 3

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www.coupa.com

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User Guide

This user guide documents the capabilities of the Coupa Open Source eProcurement solution. It is intended to be a community effort, so community members are encouraged to add, change and delete (if necessary). At the present time, this user guide is for Release 3 of Coupa eProcurement. The hope is for the document to continue to live and be a valuable resource as Coupa and the community release new versions of the project.

For a demonstration of the solution, please see Coupa.com. For our community forums, please visit Coupa Forums. We suggest you pose questions and experiences about this User Guide in the Documentation topic area of the forums. Technical documentation, such as installation guides and release notes, are available at the home page of the Coupa wiki.

This document assumes you or someone at your company has installed Coupa on-premise or has access to a hosted version of Coupa. As the Coupa eProcurement application is 100% web-enabled, you should only need your web browser to access the functionality of the application. Currently, the application works with many of the major browsers available. For detailed questions on browser compatibility, please post questions on the Coupa forums.

This guide is prepared specifically for typical users of Coupa eProcurement who do not have specific access rights to the Professional Buyer or System Administrator functions. Documentation on the functionality available to Professional Buyer and System Administrator is available. Please see the Coupa.com site or the Coupa Open Source project on Sourceforge.net to locate the document.
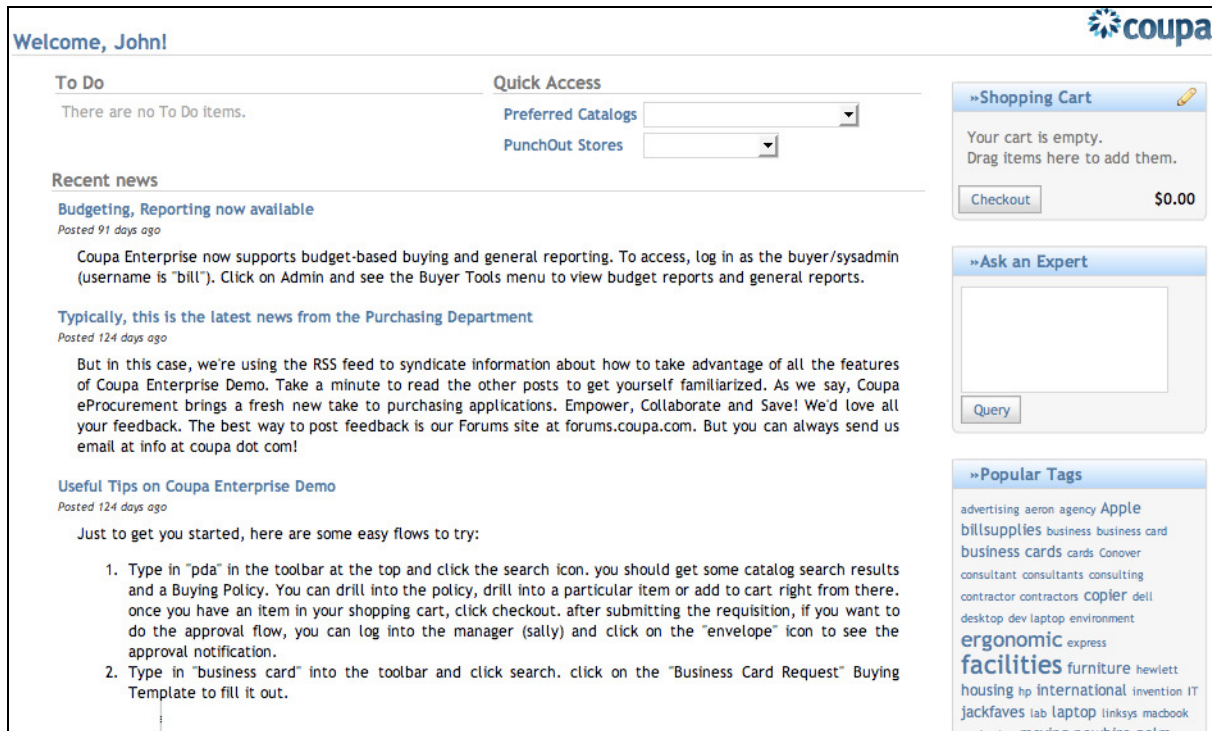
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User Guide

Home Page

After logging in to Coupa, you advance to the Coupa homepage. Depending on your organization's 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 Portlets.

Toolbar
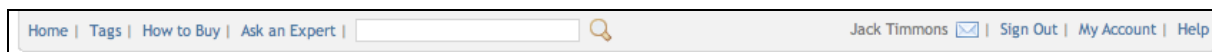
The toolbar provides easy access to the main functions of Coupa eProcurement, and remains present on every page. It provides convenient links for taking you to: the homepage ("Home"), Tags, How to Buy, Ask an Expert, Search, Notifications, My Account and more. Each of these is discussed in detail in further sections of the user guide.


To Do's and Quick Access

Below the toolbar, the latest notifications are available in the To Do area. To the right of the To Do's are the Quick Access links. The Quick Access links allow the user to immediately go to frequently

used supplier catalogs (Preferred Catalogs) and to any PunchOut sites. Do note that all supplier catalogs may not be available through the drop-down list, as your organization has chosen which supplier catalogs are preferred and which are not.

RSS Reader

You have access to an RSS feed which will often include the latest news from the Procurement and/or IT department.

## Portlets
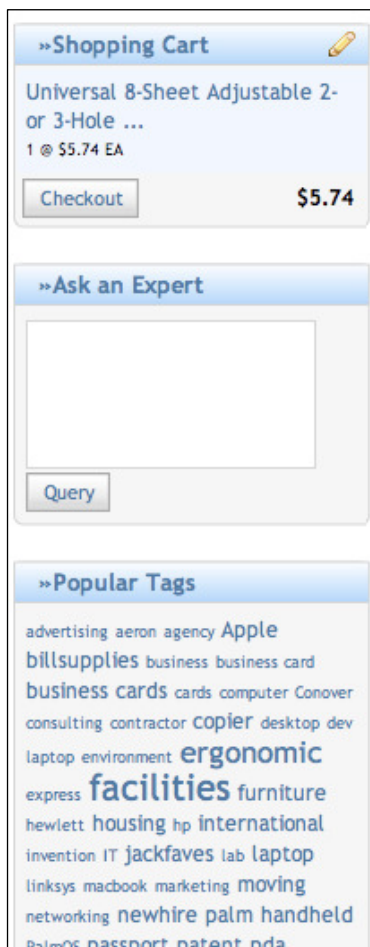
The right side of the homepage displays three portlets.

1. The mini-shopping cart contains the goods or services that you place in it. By clicking on "Shopping Cart" or the pencil icon at the top of the portlet, you can access the Quick Order Entry page, where you can edit your cart and type in additional needs.
2. The Ask an Expert portlet allows you to query the Expert forums by typing in a phrase and clicking the Query button. By clicking on "Ask an Expert" at the top of the portlet, the user is brought to the Ask an Expert section of the application. Please see the Ask an Expert section of this user guide for more information.
3. The Popular Tags portlet is a tag cloud and shows different tags 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. Clicking on an individual tag starts a search for all content associated with the tag. Clicking on the words "Popular Tags" at the top of the portlet brings you to the Tags 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 you need. To view the How to Buy section, click on How to Buy in the toolbar. You will see a list of all the policies that have been defined and can search or drill into them for more detail. You can do a full-text search of a policy using the search dialog above the list of policies.

Buying Policies

Name	Updated at	Actions
Office or Lab Furniture	September 18, 2006	▦
Relocation Services	September 18, 2006	▦
Delivery Services	September 18, 2006	▦
Computer Equipment Policy	September 19, 2006	▦
Environmentally Friendly Products	September 18, 2006	▦
Legal Services	September 18, 2006	▦
Commodity Matrix	September 18, 2006	▦
Marketing Services	September 18, 2006	▦
Print Services	September 18, 2006	▦
Catering Services	September 18, 2006	▦

How to Buy Integrated with Search

How to Buy Policies are integrated into the global search capabilities of Coupa eProcurement. If a search query matches a How to Buy policy, it is returned in the search results. The policies appear 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 your organization.

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

Creating Requisitions

There are a variety of ways to create requisitions via Coupa eProcurement – from Drag and Drop Buying to using PunchOut to typing it manually using Quick Order Entry. Enterprise Edition customers are also able to create requisitions through Buying Templates and the No-Click Requisition. For more information on those capabilities and the Enterprise Edition, please see Coupa.com.

Drag and Drop Buying

To begin creating a requisition using this method, simply type in a search string in the toolbar to find the goods or services that you need. The search results returned are ordered by relevancy to your search. To add items to your shopping cart click "Add to Cart" or drag and drop the image of the item into the mini shopping cart portlet. To see more details about the item before deciding whether to buy, click the product name. Sample search results and item details page are shown here.

When you add an item to the mini shopping cart, the cart will flash briefly. Continue to find additional items and add them to your cart until you are ready to checkout. To checkout, click the Checkout button in the mini-shopping cart portlet. To remove an item from the cart, roll the mouse over the item, then click the red icon with a "-" next to the item. To make modifications such as changing the quantity from 1 to 10 for an item or adding an item-specific attachment, see the Quick Order Entry section below.

Search

Using Coupa's search capabilities from the toolbar, you can find supplier catalog items, How to Buy policies and supplier PunchOut sites all at once. The system supports search phrases using quotation marks (" "). It also supports search operators: AND, OR and NOT.

Example Search	Finds…
red stapler	All items containing "red" and "stapler"
red AND stapler	Same as above
red OR stapler	All items containing either "red" or "stapler"
red NOT stapler	All items containing "red" but NOT containing "stapler"
"red stapler"	All items containing the phrase "red stapler"

Several special searches are also available for power users 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, and PunchOut sites that are tagged with the search term

Quick Order Entry

Using Coupa's Quick Order Entry, you can create or modify requisitions. To access the Quick Order Entry page, click the words "Shopping Cart" or the pencil icon in the mini-shopping cart portlet.

From the Quick Order Entry page, you can remove items from the cart, modify, attach, clear the cart, and more. At any time, you can initiate a checkout 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 you to the checkout page
- Add lines creates blank lines on the shopping cart.

To enter a requisition line using Quick Order Entry, first select the line type. Coupa eProcurement supports both Amount (Amt) and Quantity (Qty) based lines. Amount-based lines do not require a quantity or Unit of Measure, and are typically used for ordering fee-based services.

Next, type in the Item description. For Quantity-based lines, as you type, Coupa eProcurement will try and auto-complete your entry with matching supplier catalog items. You can select a match at any time via the dropdown list. When you do, pricing will automatically default, as will Unit of Measure. If there is no match, the system will expand an additional information area after you leave the Item field. From here, you can enter additional information about the requisition line, including supplier (which

also auto-completes as you type) and attachments (e.g., line-item justification or statement of work). If you wish to use a vendor that is not currently in the system, see the New Supplier Request section below.

New Supplier Requests

As stated above, when you type in a requisition line for an item or service that does not exist in the catalog, the system auto-expands the additional information area. If you know the vendor that can supply the item or service, type it into the Supplier field. The system will then look to match your entry against suppliers in the supplier database. For instance, typing in "ABS" brings back a list of suppliers including "ABS Services" and "Donavan Labs". If your supplier is listed, pick it from the list. If the system is unable to find a match you may wish to create a New Supplier Request.

Enter a new supplier request by completely typing in the name of your new supplier in the Supplier field. When you leave the Supplier field (perhaps by hitting the tab key), the system pops-up a New Supplier Request form. This is where you should enter details about the vendor, such as contact information and an address. Once you complete the form click "Save".

When you submit a requisition with a New Supplier Request, it will likely be forwarded to the Purchasing department. A buyer then determines whether to activate the supplier (possibly gathering additional information) and whether to allow further processing of the requisition.

PunchOut

A company can establish PunchOut links to a set of supplier websites, allowing you to shop directly at a supplier website such as OfficeDepot.com. For more information, see the PunchOut section of the End User Guide.

Submitting Requisitions

You can quickly submit a requisition 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 decide you need to modify your shopping cart, click the "Edit or Delete Items" button.

Shipping and Billing

The system defaults Shipping and Billing information based on your personal preferences. If the information is incorrect, click the "Change" button. When changing a shipping address, you access your personal address book and can select the right address for your order. If the system doesn't have the right address, simply add it. Be sure to set your most common address as default to save time on your next checkout.

To pick the appropriate billing information, you select an account from a list of accounts that have been established in the system. The account may have one or more segments depending on your

implementation. You may filter accounts using a search mechanism to quickly find the right account. Select the appropriate account and remember to set your most common account as default.

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.

Justification and Attachments

You can submit a justification for the requisition in a text box. More detailed justifications or other information (such as a statement of work or detailed specifications) can also be included as an attachment to the requisition. Click "Browse" to pick the appropriate file from your computer. If the attachment is meant for internal use only, select a destination of "Buyer". If you want the attachment to be sent to the vendor, select a destination of "Supplier". Vendors can access "Supplier" attachments via a link in the Purchase Order email they receive.

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 that is sent to their online Inbox, called the Notification Inbox. The email notification includes nearly all requisition information so the approver can decide to approve or reject the requisition without ever logging in. At the bottom of the notification are links to allow the approver to quickly disposition the requisition.

The system issues notifications for other events as well, such as Requisition Rejection. These additional notifications are also issued both as an email and as a message to the Notification Inbox.

Notification Inbox

All notifications that are sent to the user's 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 Coupa 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 are listed next to the icon.

When viewing the Inbox, the user sees the notification subject and the date received. Drilling into the subject line brings the user to the details of the notification.   Approvers can see any attachments associated with the requisition.

Offline Approvals

Coupa allows approvers to disposition the requisition without logging into the Coupa application. The approver receives a notification via email. The approver can simply click the "approve" or "reject" links at the bottom of the notification. In most email systems, when either of those links are 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 instructions on how to disposition the requisition based on the special code. If the approver clicks the "See more detail" link in the email notification, the approver is taken to a Coupa screen to view all the details of the requisition, including any attachments on the requisition. Please note that the approver needs to log in to see all the details.

Approval Request for Ben Jarvis – Requisition #365

Get Mail Write Address Book   Reply Reply All Forward   Delete Junk   Print Stop

Subject: Approval Request for Ben Jarvis – Requisition #365
From: approvals@blcg.coupademo.com
Date: 10:55 PM
To: noah@coupa.com

Ben Jarvis has submitted the following requisition for your review.

Shipping

Ben Jarvis
103 Washington Ave
San Jose, CA 95008
US

Billing

Account Description: Sales
Account Code: USA-Sales-Indirect
Purchases

Cart

Item	Supplier	Qty	Unit	Price	Item Total
Basket Whiteboard cleaner	ABS Services	1	Each	$3.59	$3.59
Universal 8-Sheet Adjustable 2- or 3-Hole Basket Desktop Punch 9/32" Dia. Hole, Black 74223 / UNV74223	ABS Services	1	Each	$5.74	$5.74
Basket Somat Dishwasher Cleaner	ABS Services	1	Each	$10.99	$10.99
				Cart Total	$20.32

Approvals

Ben Jarvis — Nick Edgar

Justification

For stockroom

Attachments

No header-level attachments

[See more detail] [Approve] [Reject]

Approving through notifications may work with many popular cellular and smartphone devices depending on the email client on the device. The Blackberry 7100 is one such device.

Checking on Approval Status

The requester can follow the progress of Requisition approval in the My Account area. See the My Account section of the User Guide for more information.

Attachments on Approvals

Approvers 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 eProcurement provides you with the ability to check order status, review past orders, receive goods and services, review your tags, review your employee reviews, and more. To access the My Account section, click My Account on the global toolbar.
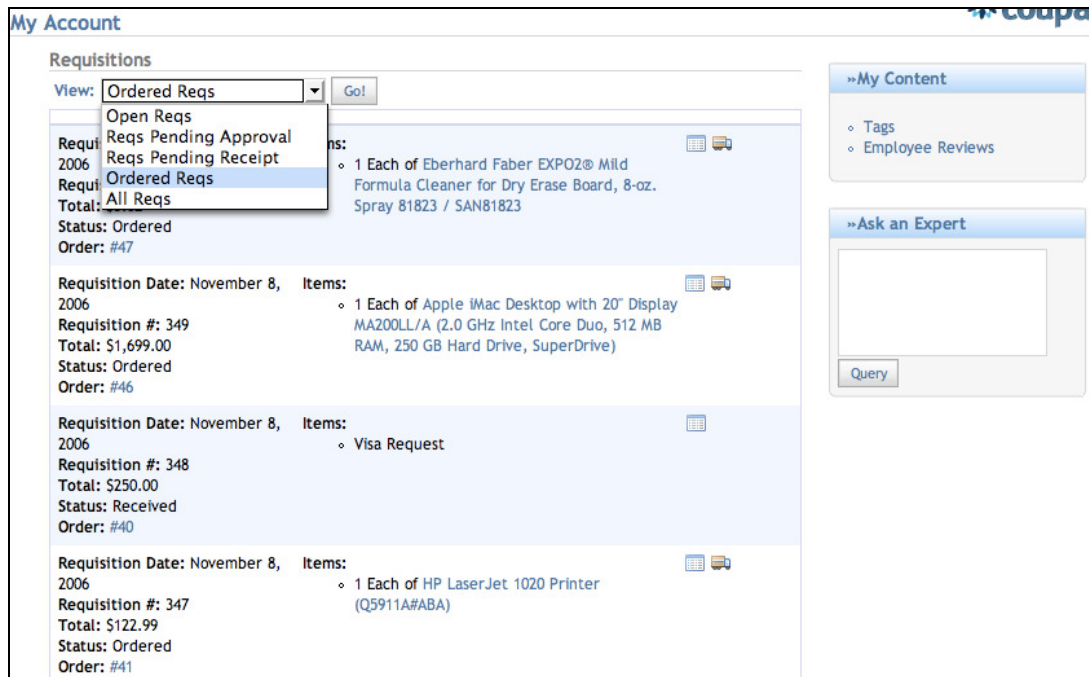
By using different Requisitions views, you can quickly access all past and present orders, find additional information, and perform actions via icons. Consult the following table.
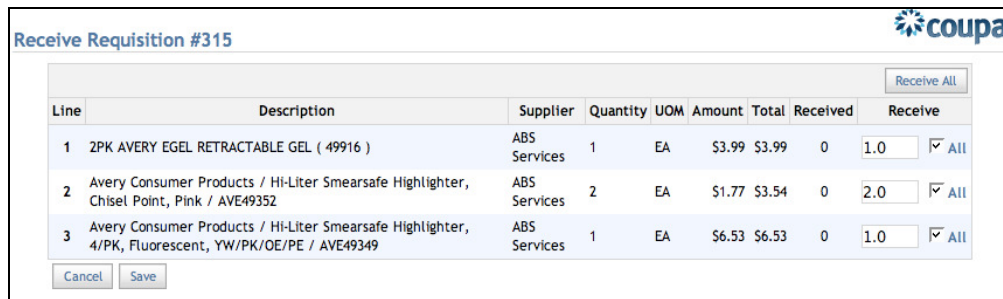
View	Finds…	Available Action Icons
Ordered Reqs	Requisitions approved and issued as Purchase Orders	Details, Receive
Open Reqs	Requisitions in "draft" status. Includes Requisitions not yet submitted and Requisitions rejected during approval.	Details, Edit
Reqs Pending Approval	Requisitions in the approval process	Details, Remind, Withdraw
Reqs Pending Receipt	Requisitions approved and issued as Purchase Orders but not yet fully Received	Show, Receive
All Reqs	All Requisitions ordered by creation date	Details, Edit, Remind, Withdraw, Receive

By clicking the "Details" icon, you can see the Requisition including current status of approvals. For Open Reqs, you may edit the Requisition by clicking the "Edit" icon. For Reqs Pending Approval you may click the "Remind" icon to send an email reminder to the approver. You may also click the "Withdraw" icon to remove the requisition from the approver's or buyer's queue. Your requisition, in this case, is returned to "draft" status. For Reqs Pending Receipt, you can click the "Receive" icon to enter receipts for goods and services.

For Ordered Reqs, you can also click the "Order #" link to drill into a PDF version of the purchase order.

Receiving

Coupa's receiving functionality permits you to indicate if you have received the goods or services you ordered. By clicking on the "Receive" 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.
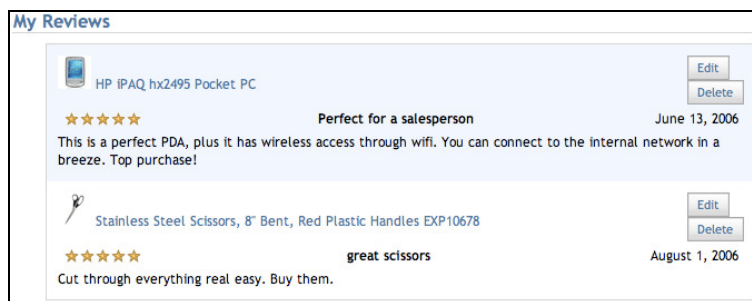

My Content

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, you 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 remove it 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 you have posted. You can modify the review by clicking "Edit" or delete the review.

Ask an Expert

Ask an Expert is a set of capabilities in Coupa eProcurement that encourage collaboration, facilitate knowledge sharing and help users get answers to their 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 users, query the knowledgebase and more. Below is a sample screenshot of an Ask the Expert main page. Of course, this page depends on how the capability has been configured for your organization.

Search the Knowledgebase

You can search the knowledgebase for previous 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, just type the search term or phrase in the Ask an Expert portlet available on most pages. If the system finds one or more matches, it suggests you review those postings before posting a new question.

You may also Ask an Expert straight from global search. To see how, Click the "Ask an Expert" link on the toolbar to access the main Ask an Expert page. Note the global search now shows "ask:" already filled in for your question. Append your query onto this, such as "ask:chicago advertising services supplier", then hit return. "ask:" is one of many advanced searches built into global search.

Post a Question

To post a new question, ask your question via the portlet or in the "Ask a new question" region of the main Ask an Expert 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 your organization, help route questions to the right people. When you post a new question, experts in the category you have chosen receive a copy of your question. One or more may offer you an answer. You may clarify or add information to the original question at any time.

When you are satisfied that the question has been answered, you can close the question. At this point, no further answers are permitted from anyone in the system but you 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

Anyone in the organization can subscribe to Ask an Expert categories, except for categories that have been determined to be private or invitation-only. To subscribe, select the appropriate category from the drop-down list on the Ask an Expert main page and click "Subscribe". At this point, the category appears in 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 your email preferences. If you would like to receive email notifications for all new questions and answers in that category, check the "receive via email" box. By default, this option is not selected.

Answering Questions

To respond to an open question, simply click on the question. At this point, you see all current answers. By clicking "Answer", you can post your own 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 have not posed or answered questions, these regions are not visible. The main page shows the latest questions in these regions and includes a link for you to see all activity.
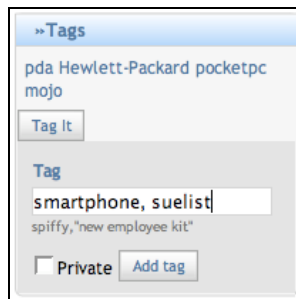
Content Tagging

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 more easily locate the item, help improve searchability for others, share a list of favorites 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. Users can click on any tag in the portlet and the system finds all items, PunchOut sites and how to buy policies associated with the tag.

Tagging Items

To create a tag on a supplier catalog item, you must be on the item details page. On this page, a Tags portlet exists on the right-hand side. It shows all existing tags on the item. By clicking "Tag It", the portlet expands to allow you to type in additional tags. By default, all tags are public. Public tags allow for easy sharing with colleagues. Click the private checkbox if you wish for the new tag to be visible to you only and not accessible by other users.


In the example above, the item is already tagged with several terms such as "pda", "Hewlett-Packard", and so forth. The user is 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. Once back in Coupa, you can complete the checkout process and submit your requisition. Many of the larger office supply vendors, MRO suppliers, and technology equipment vendors support the PunchOut protocol.

If your organization has enabled one or more vendors for PunchOut, a link to the external site(s) appears in the Quick Access links on the homepage. Additionally, the PunchOut link may be shown based on the search query entered by the user. For instance, if an organization has enabled a vendor such as Dell for PunchOut shopping, a search for "dell" may result in the following results:
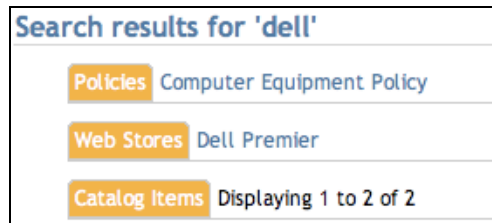
By clicking on the Web Stores PunchOut link (in the example above "Dell Premier"), you are taken to the website of the supplier. Shop on the supplier's site and add items to your cart. When you are finished, you should initiate the checkout process at the supplier's site. However, instead of going through a full checkout at the supplier's site, PunchOut redirects you back to the Coupa application. All the items that were in the your cart at the supplier site are transferred into the Coupa shopping cart. From that point, you may continue to shop or complete checkout through the Coupa application.