Open Source Edition User Guide

October, 2006

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User Guide

This user guide will document the capabilities of the Coupa 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, the user guide will be for the preview release 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 and for our community forums, please visit Coupa Forums. We suggest that 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.

It is assumed that you or someone at your company has installed Coupa on-premise or that you have 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 will work with many of the major browsers available. For detailed questions on browser compatibility, please post questions on the Coupa forums.

This user guide will be divided into sections for the 3 major roles of users of Coupa eProcurement:

- End User
- Professional Buyer
- System Administrator

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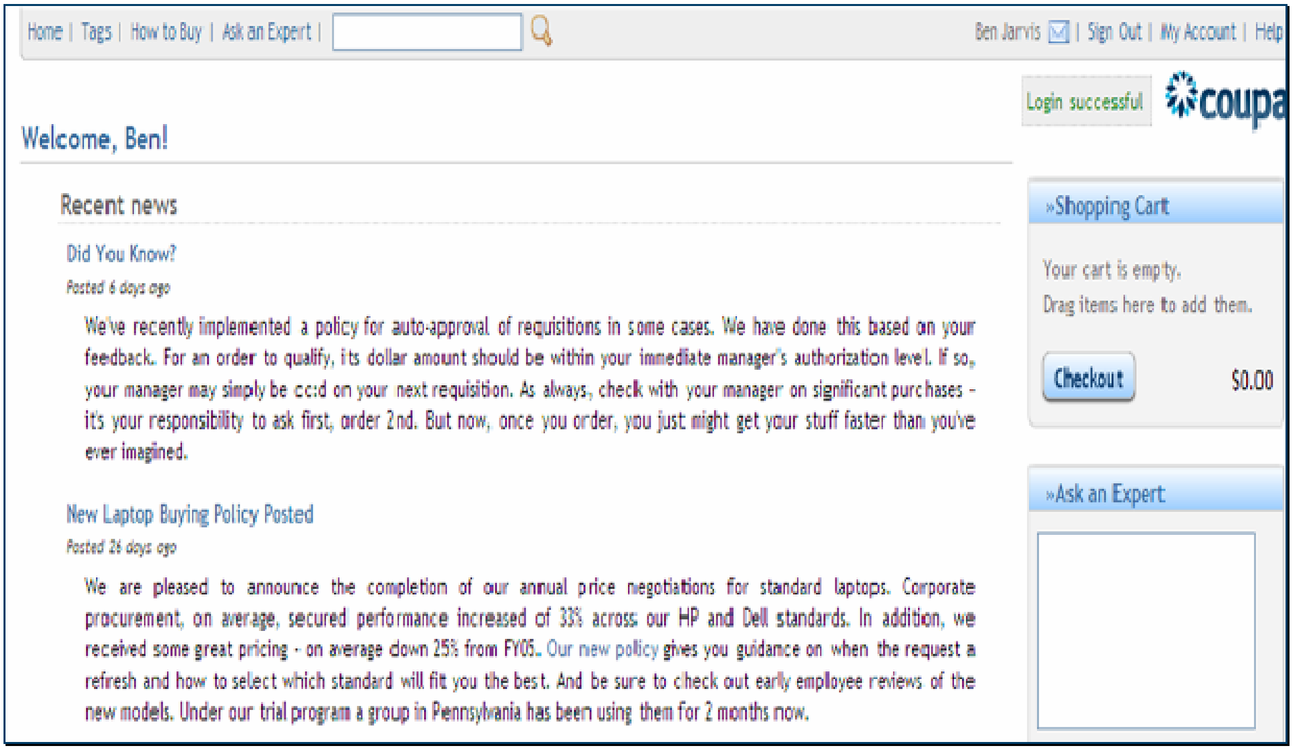
End User Guide

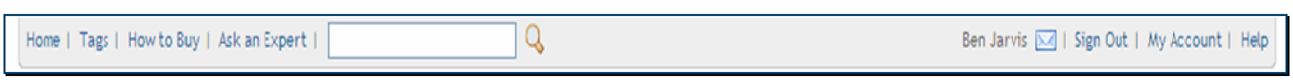
Home Page

After logging in to Coupa, the user is brought to the Coupa home page. Depending on how the company's particular implementation of the application, it likely looks similar to the following image.



The homepage is the user's central access point to all procurement-related activities. It is composed of 3 areas: Toolbar, RSS Reader and the Portlets.

Toolbar

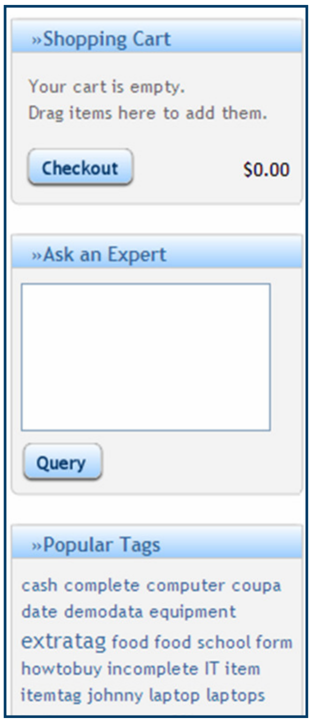


The toolbar is for easy access to the main functions of Coupa eProcurement. It has buttons for taking the user to the home page ("Home"), Tags, How to Buy, Ask an Expert, Search, Notifications, My Account and more. Each of these is discussed in detail in further sections of the user guide.

RSS Reader

Underneath the toolbar on the left side, the user has access to a RSS feed. Depending on the company's configuration, this may include the latest news from the Procurement department.

Portlets



The right side of the homepage displays three portlets.

1. The mini-shopping cart contains the goods or services that the user has placed in it. By clicking on "Shopping Cart" at the top of the portlet, the user is brought to the Editable Shopping Cart.
2. The Ask an Expert portlet allows the user 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 section of this user guide on Ask an Expert for more information.
3. 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. The user 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 users on the right way to purchase the goods and services they need. To view the How to Buy section, click on How to Buy in the toolbar. Users will then see a list of all the policies that have been defined and can search or drill into for more detail.   Users can do a full-text search of a policy using the search dialog above the list of policies.

Buying Policies

Policy	Last Updated
Catering	June 9, 2006
Computer and Related Supplies	June 13, 2006
Corporate Laptop Policy	July 18, 2006
Delivery Services	April 26, 2006
Enviromentally Friendly Products	June 9, 2006
Hiring a Consultant	June 20, 2006
Lab Supplies	June 9, 2006
Legal Services	June 22, 2006
New Computer Equipment	April 26, 2006
Office or Lab Furniture	June 9, 2006
Office Supplies	June 8, 2006
PDAs	July 16, 2006
Relocation Services	June 9, 2006
Travel	June 9, 2006

The enterprise policies are integrated into the global search capabilities of Coupa eProcurement. If a search query matches a How to Buy policy, then it will be returned in the search results. The policies will be above the catalog content results. As an example, if a user searches 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.

Creating Requisitions

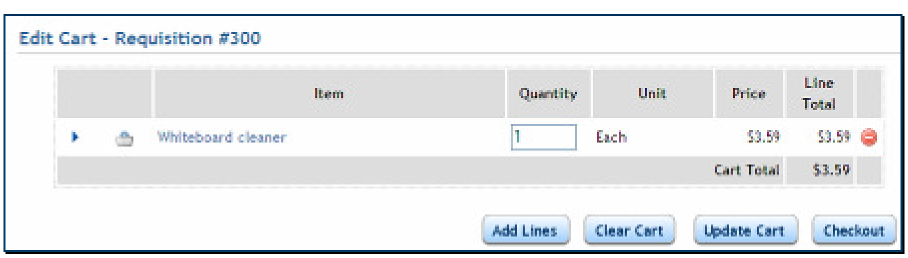
There are several different methods to creating requisitions in the Coupa eProcurement application. Requisitions can contain contracted items or services in the system's local catalog, supplier-managed PunchOut items or manually entered requisitions through the editable shopping cart feature. Enterprise Edition customers will also be able to generate requisitions through Buying Templates and the No-Click Requisition. For more information on those capabilities and the Enterprise Edition, please see Coupa.com.

To begin creating a requisition, users type in a search string in the toolbar to find the goods or services that you require. The search results will be 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, users can drill into the product name to view the item details. A sample item details looks like:

When added to the mini-shopping cart, the portlet will flash momentarily and then the user will see the item in his or her cart. The user can continue to find additional items and add them to the cart until ready to checkout. To checkout, the user will click Checkout button in the mini-shopping cart portlet. To remove an item from the cart, the user can roll the mouse over the item. A red icon with a "-" will appear next to the item. The user can click the icon and the item will be removed.

Editable Shopping Cart

The editable shopping cart provides the user will additional flexibility to create requisitions quickly and modify what is currently in the cart.



From the editable cart, the user 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, the user can initiate a checkout when finished or continue shopping.

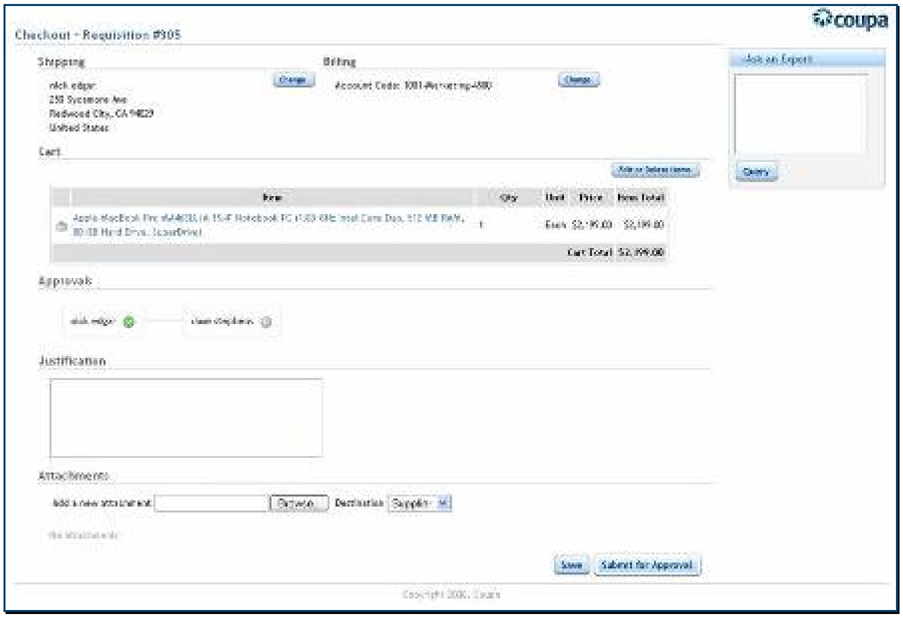
- Recalculate cart: Examines any changes to the cart and recalculates line and requisition totals
- Clear cart: Empties the cart and brings user to home page
- Checkout: Brings user to checkout page
- Add lines: Creates blank lines on the shopping cart. From this point, the user can manually type in a requisition line. The system will check if that item exists in its catalog. The user 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 user may choose to provide additional information by clicking the right-facing triangle next to the line. This will expand the information that the user can enter for this line, including information such as suggested suppliers, attachments meant for internal users (such as line-item justification) or attachments for suppliers (such as statement of work).

PunchOut

Please see the PunchOut section for details on creating a requisition with external content.

Submitting Requisitions

Users submit requisitions via the checkout page. The checkout page gives the user 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 the user needs to modify their shopping cart, this can be accomplished by clicking the "Edit or Delete Items".

Shipping and Billing

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

To pick the appropriate billing information, the user selects 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. The user chooses the appropriate one and can optionally set a particular 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

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. The user clicks "Browse" to pick the appropriate file from the local computer. If the attachment is meant for internal use only, the destination of "Buyer" should be selected.

Requisition Approvals

Most requisitions will 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. When clicked, a new email is created to be sent by the approver to the system.

Notification Inbox

All notifications that are sent to a user's email account also populate the Coupa Inbox. The Inbox can be accessed by clicking the Envelope icon on the global toolbar. If there are no new notifications, the icon will be a "closed envelope". If there are new notifications, the icon will be an "open envelope." Additionally, the number of new notifications will be listed next to the icon.

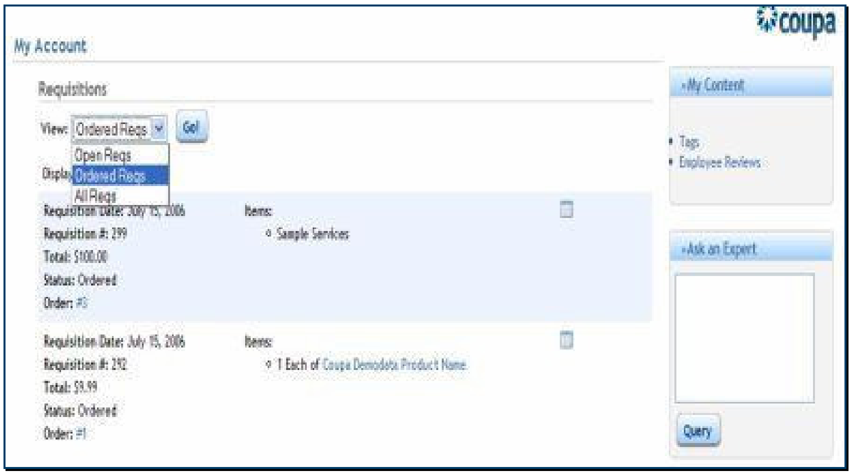
When viewing the Inbox, the user sees the notification subject and the date received. Drilling into the subject line brings the user to the details of the notification.   Approver can see any attachments associated with the requisition.

Checking on Approval Status

The requisitioner can follow the progress of the approval in the My Account area. See that part of the user guide for more information.

My Account

The My Account area of Coupa eProcurement provides users with the ability to check order status, review past orders, review their tags and employee reviews and more. To access the My Account section, users click My Account on the global toolbar.



Users can see all their requisitions that have been ordered by using the drop-down view. In addition to the details of the requisition, the user can drill into a PDF version of the purchase order. If a requisition is not yet ordered, it is listed under the open requisitions view. In this view, the user will see all requisitions that are in draft mode, pending approval status or pending buyer action status. For requisitions in pending approval status, users can see outstanding approvals, withdraw the requisition or resend an approval notification request. For requisitions in pending buyer action status, users may withdraw the requisition. If the user withdraws the requisition, it will no longer be in the approver's or buyer's queue. It will be listed as a draft requisition for the user.

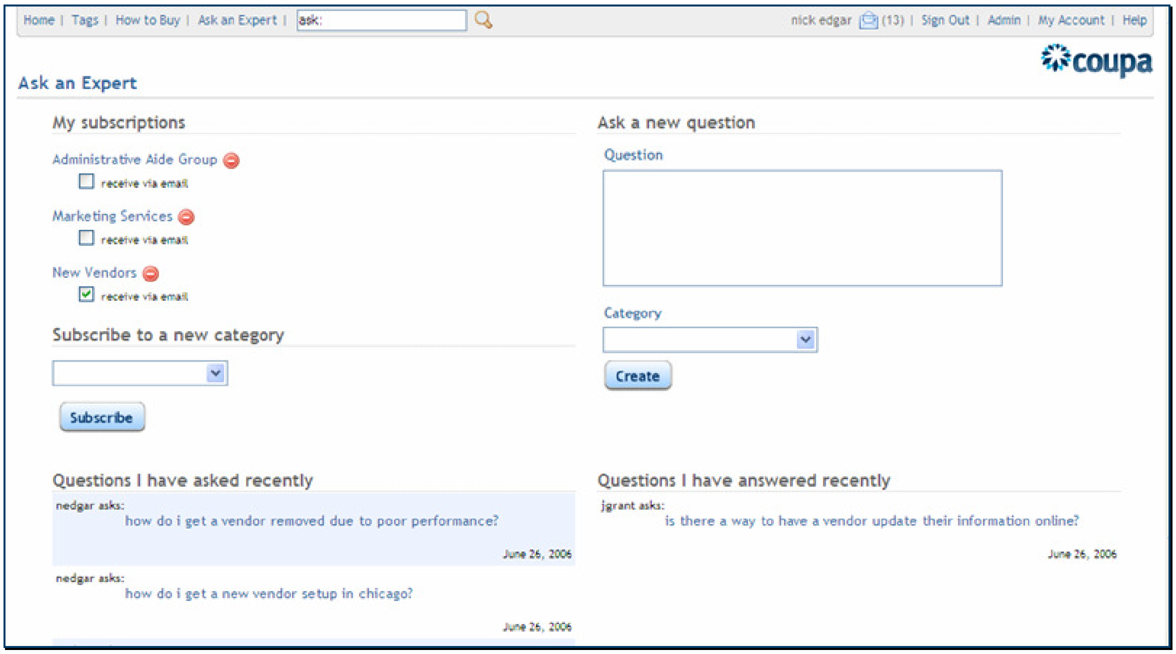
My Content

In the My Content portlet on the My Account page, the user can manage much of the content that they've created in the system. By clicking on the "Tags" link, the user can view his or her personal tag cloud. Below the cloud, the user sees each tag and the associated content that has been tagged (also referred to as "taggings"). Users 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. The user then tagged 10 items with the "new hire" tag. On this My Tags page, the user could delete the tag "new hire" or can remove the tag from 1 or more of the 10 items.

In the My Reviews page, the user can easily manage their employee reviews. When this page is accessed, the user views all of the reviews that he or she has posted. The user can modify the review by clicking "Edit" or delete the review.

Ask an Expert

Ask an Expert is set of capabilities in the Coupa eProcurement application that encourages collaboration, facilitates knowledge sharing and helps 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, the user 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 will depend on how this capability has been implemented and configured.



Search the Knowledgebase

Users 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, users can type the search term or phrase in the Ask an Expert portlet on most pages. If the system finds a match or matches, it will suggest that the user review these postings before posting a new question. The system displays the original question and the user can drill down into all the answers and resolution of the question. On the Ask an Expert main page, the user can also perform a query of the knowledgebase. Here, the global search shows "ask:" already filled in. The user appends his or her query onto this, such as "ask:chicago advertising services supplier". "ask:" is one of the many advanced operator searches that is supported by Coupa eProcurement.

Post a Question

To post a new question, users enter their question in the "Ask a new question" region of the page. The best questions will be detailed enough to get proper responses. The user 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 the user wants to add to or clarify the original question, the user can add to the thread. When the user is satisfied that the question has been answered, he or she can close the question. At this point, no further answers are permitted.

Managing Subscriptions

Users 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, a user selects the appropriate category from the drop-down list and clicks "Subscribe". At this point, the category will appear in the user's list of subscriptions. The user can drill into the category to see the list of open and closed questions, unsubscribe from the category and set the email preferences. If the user would like to receive an email notification of all new questions and answers in that category, the user should check the appropriate box. By default, this option is not selected.

Answering Questions

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

Viewing your Ask an Expert Activity

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

Content Tagging

Tagging provides an easy way for users to assign a "term" to an item or set of items. By adding a tag to an item, the user can easily locate the item, can help improve searchability, can share the tags with others and more. A tag can contain one or more words. Some examples of tags and their potential use: * ergonomic - could be used for all ergonomic-related items in the catalog * laptop - could be used for all laptops, notebooks, tablets, etc. so when a user searches on laptop, he/she will be brought to all associated items * "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 will find all items, punchout sites and how to buy policies associated with the tag.

Tagging Items

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

In this example, the item is already tagged with "suelist". The user is adding "highlighter" and "new hire" as public tags on the item.

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

PunchOut

PunchOut functionality allows users to shop at selected external websites and bring back their external shopping cart into the Coupa application. The user completes the requisition and does the checkout process in Coupa. Many of the larger office supply vendors, MRO suppliers, technology equipment vendors and others support the PunchOut protocol.

If the user's organization has enabled certain vendors for PunchOut, a link to the vendor's site will appear in search results, as well as other places in the application. For instance, if an organization has enabled OfficeSupplierXYZ.com for PunchOut organizations, a search results may look like this:

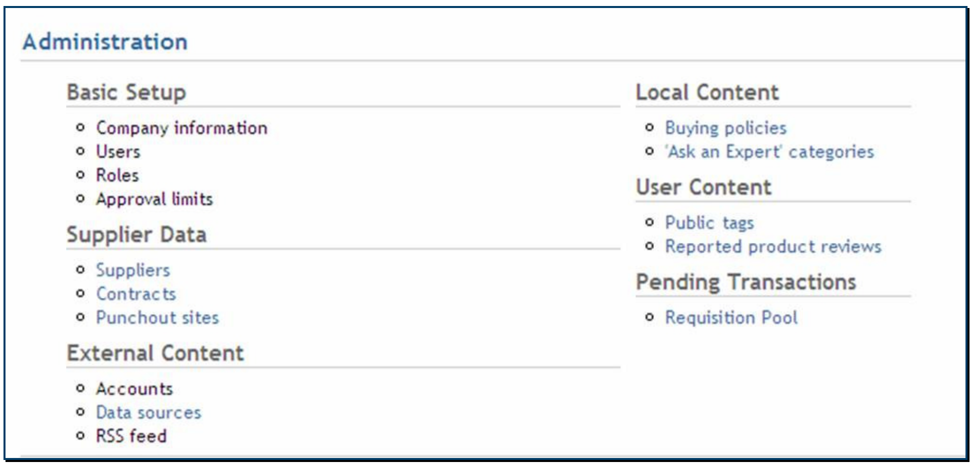
By clicking on the punchout site, the user will be taken to the website of the supplier. The user can shop on the supplier's site and add items to his or her cart. When all items have been added, the user should initiate the checkout process at the supplier's site. However, instead of going through the checkout at the supplier's site, the PunchOut redirects the user back to the Coupa application. All the items that were in the user's cart at the supplier site now appear in the Coupa shopping cart. From that point, the user can continue to shop or checkout through the Coupa application.

Professional Buyer Guide

Buyer Overview

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

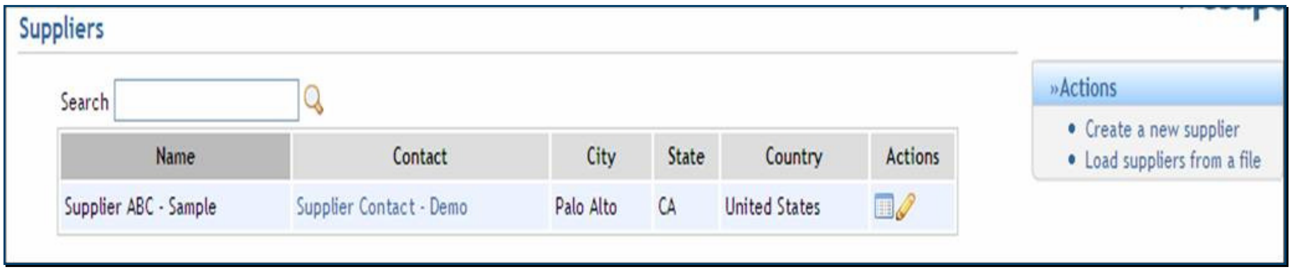
The buyer can access these additional capabilities by clicking the Admin link in the global toolbar. At this point, the buyer views the buyer administration console.



The information is organized into various sections. If a link is not active, it means that the user does not have access to the function. System administrators and users who have been granted specific permissions will be able to access the non-active functions.

Managing Suppliers

Buyers can manage their supply base through the Suppliers page accessed from the Buyer Administration page. When opening the page, the buyer sees the list of current suppliers, including the primary contact information for the supplier. Buyer can do a query of suppliers using the search dialog box above the list of suppliers.



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 will be 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 1 of the 2 columns. As an example, the file has Primary Address Country Code and Primary Address Country Name as related columns. The buyer can either enter a value for the Country Code or Country Name. The CSV file that the buyer has edited can now be uploaded by clicking the Browse button and selecting the file from his/her local computer. Press "Go" to begin the process. The system will give a status of the upload and taken to the Data Sources page after upload is complete. On this page, the buyer will see the status of the upload. If errors were encountered, the buyer can click on the "with errors" link for the associated file to see any invalid rows.

Managing Contracts

Coupa provides contract management functionality to create, edit and maintain supplier contracts. When the Contracts page is accessed, the buyer views the list of existing contracts. Details of the contracts are shown, including the supplier name, expiration dates and status. The user can view, edit or delete the contract from the Actions column. The buyer can do a query of existing contracts using the search dialog box above the list of contracts.

Contracts

Search ABC

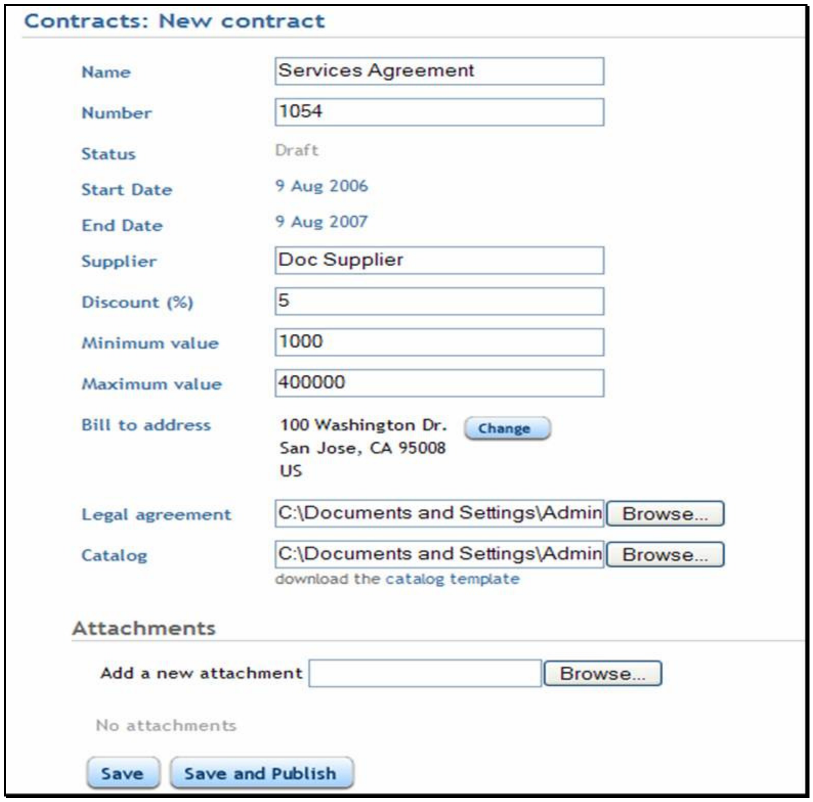
Number	Version	Supplier	Starts	Expires	Discount	Min value	Max value	Terms	Status	Actions
44		Supplier ABC - Sample	June 7, 2006	June 19, 2008					Published	
108		Supplier ABC - Sample	January 1, 2007	December 31, 2007	5.0				Published	

New contract

To view the details of the contract, click on the details icon located in the Actions column. The buyer sees 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. The buyer will 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.



Catalog items are loaded alongside 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 will begin when the contract is published. The load status will initially show 0%. Check the Data Sources link to see progress of the catalog load. Effectivity dates of a contract allow the buyer to manage when the contract is available to end-users. Published contracts are available for use, so all items/services related to that contract will be available in the system.

Note: Currently, the discount %, min and max values are not utilized by the system.

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 will remain in Draft status and To save the new version in Draft status, click "Save". In the list of contracts, both the Published and Draft versions will be 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 will show 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.

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, the buyer 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

The buyer can manage 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, item, qty/unit/price (quantity-based items), amount (amount-based items) 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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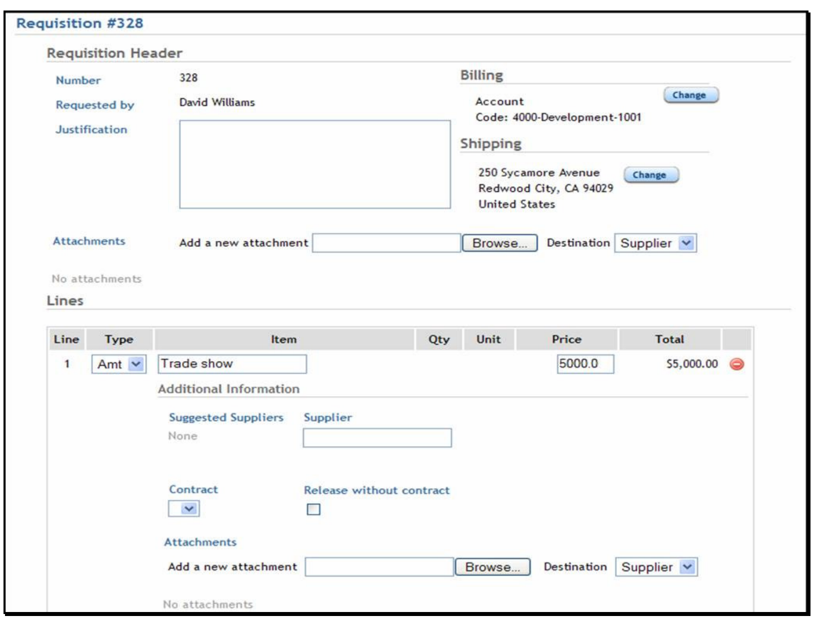
Requisition Pool

The buyer accesses the requisition pool from the Buyer Administration console. The buyer views a list of requisitions in the pool, including the requisitioner and requisition total. The buyer can do a query of requisitions in the pool using the search dialog box above the list of requisitions. To open and modify a requisition, the buyer clicks the requisition number. The header and lines of the requisition are shown, as in the example below:



At the header level, the buyer views and can change the billing and shipping information, attachments and requisition justification. Below the header are the individual lines of the requisition. The buyer 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, the buyer enters the appropriate information. If no supplier is listed, the buyer should type in the supplier name. The buyer can type in part of the name and the system will automatically search and bring back potential matches. After the vendor is selected, the buyer can pick from the contracts associated with the vendor or choose to release the line without a contract. The buyer 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, the buyer clicks "Submit for Approval" 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.

Managing How to Buy Policies

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

Access the How to Buy Policies page from the Buyer Administration page. The buyer sees a list of current policies and the date that the policy was last updated.

Buying Policies

Policy	Last Updated
Catering	June 9, 2006
Computer and Related Supplies	June 13, 2006
Corporate Laptop Policy	July 18, 2006
Delivery Services	April 26, 2006
Environmentally Friendly Products	June 9, 2006
Hiring a Consultant	June 20, 2006
Lab Supplies	June 9, 2006
Legal Services	June 22, 2006
New Computer Equipment	April 26, 2006
Office or Lab Furniture	June 9, 2006
Office Supplies	June 8, 2006
PDAs	July 16, 2006
Relocation Services	June 9, 2006
Travel	June 9, 2006

Creating a How to Buy Policy

At the bottom of the list of policies, the buyer 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.

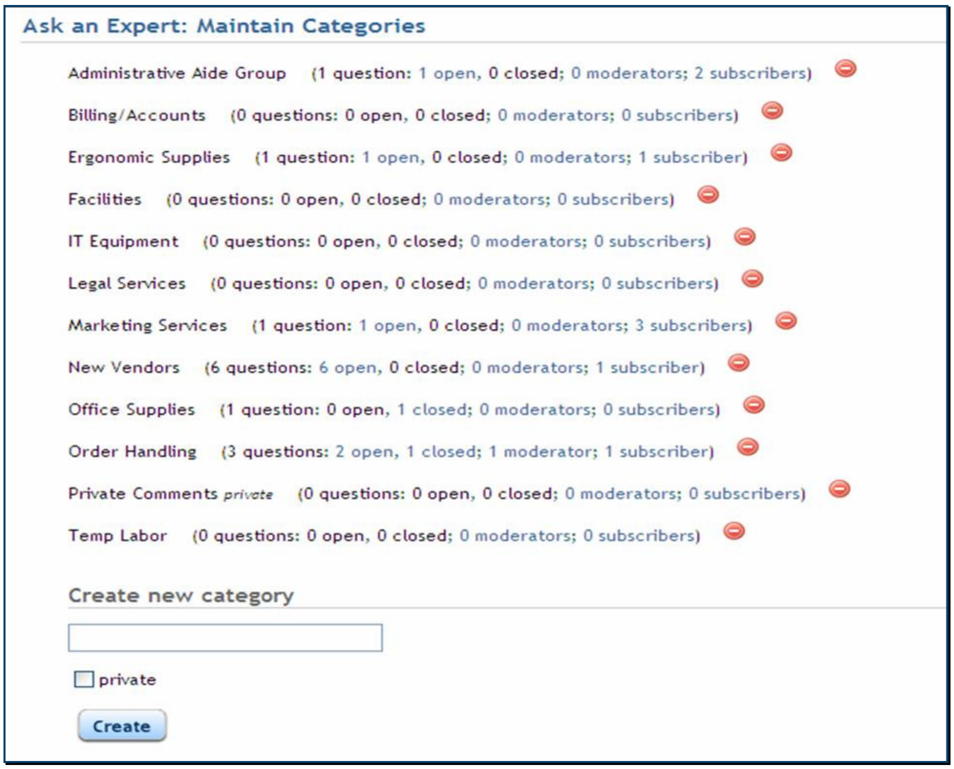
In the Text box, the buyer can create the policy text. If a policy document already exists (e.g., on an intranet site or in a word document), the buyer can cut and paste the policy into the Text box. Much of the formatting will be maintained. To create the text manually, just enter the text in the editor. 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 users to various locations. Examples include a supplier's website, additional documents or even point the user 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 view an existing policy, the buyer clicks on the policy name. The buyer can add additional tags to an existing policy through the Tags mini-portlet. To edit the policy, click the "Edit" link at the bottom of the policy. To delete the policy, click the "Destroy" link. When editing the How to Buy policy, the policy will appear in the WYSIWYG editor, such as in the screen shot.

Maintaining Ask an Expert

Ask an Expert provides users with an easy way to post questions, receiving 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:



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 users. 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 users 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 will appear 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, maintain subscribers and moderators. To edit a name, put the cursor on top of the category name. The category will become highlighted in yellow. By clicking your mouse, the name will become 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 users 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 users 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 will oversee a particular Ask an Expert category and ensure that questions are being answered properly.

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

Maintaining User Created Content

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, the buyer sees a tag cloud of all tags in the system. To find a particular one, the buyer can do a browser search. By clicking on a tag in the tag cloud, he/she is 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 will delete the tag and all associated taggings. If the buyer wants to simply remove one or more taggings and keep the tag, the buyer should 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.

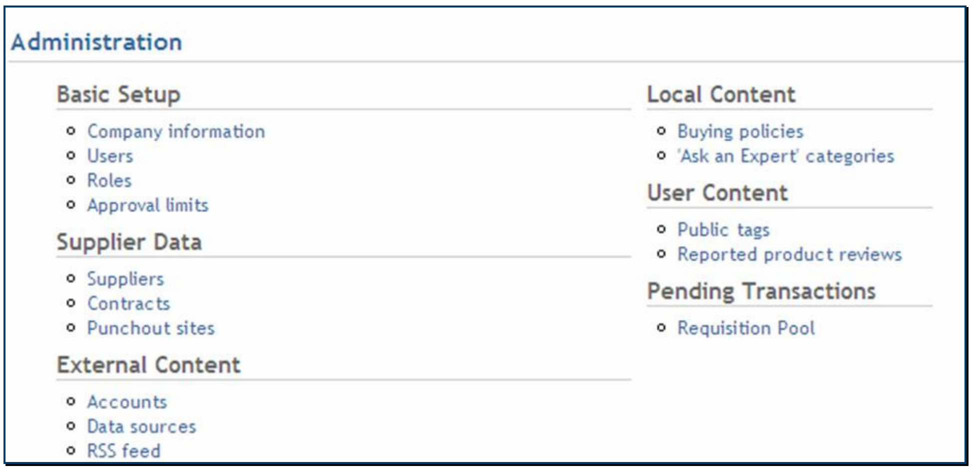
Employee reviews help provide feedback on the particular item that an employee has ordered. It helps others in the organization, as well as the buying department, make better decisions over time. If a user sees an employee review that he/she believes is offensive or objectionable, it can be reported (see the End User Guide on how to do this). The buying department 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, the buyer sees 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, the buyer clicks on the "Remove Review" link in the Actions column. If the review is deemed to be "ok", the buyer clicks on "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 end users 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.

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



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

Company Overview

This section will be used for organization defaults. At the present time, the system administrator sets the Company Name in this screen. This company name is used in email notifications, purchase orders and elsewhere.

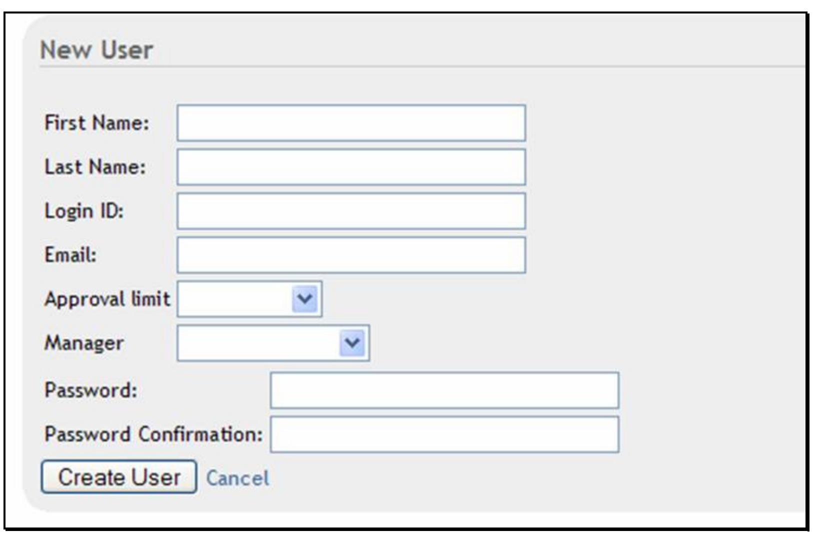
User Management

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

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, the administrator can change the first and last name of the user, approval limits, manager, password and roles. LoginID and Email cannot be altered via the user interface screen. To delete a user, click the minus icon. 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, via the User API (not discussed in this documentation), 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 users 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 users. Additionally, the administrator 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 will be visible and all errors will be reported in the Data Sources section of the application.

Role Management

Role Management gives the system administrator the ability to grant specific privileges or permissions to users. The administrator establishes 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 implementation 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 users that need to create/approve requisitions
4. Guest - Implicit role and just for access to login page

The Buyer and User role can be modified as needed by the company's requirements. 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 Admin, User and Guest roles cannot be deleted, but all other roles can be deleted by clicking "Destroy" button. Take necessary precaution before deleting roles.

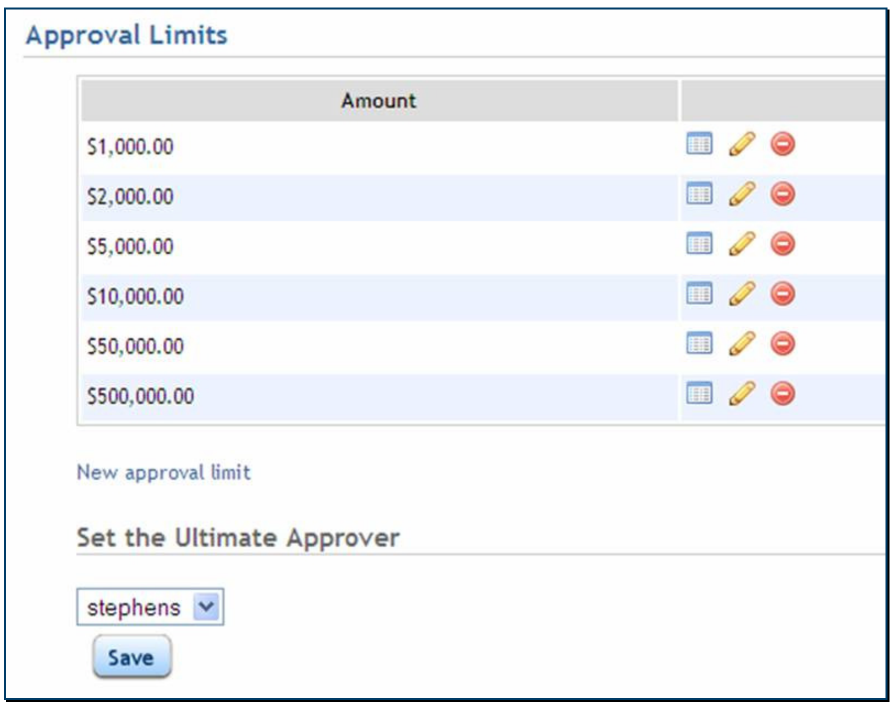
Creating a Role

New roles can be created to assign appropriate permissions to users in the organization. To create a role, click the "New Role" link. The system will ask for a name of the role and description. After entering that information, the administrator 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.

Approval Limits

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 will go 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 will be approved. If he/she approves it but does not have approval authority above the requisition total, then the requisition will need 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. The sys admin sees a list of current approval limits such as the page below.



To edit an approval limit, click the pencil icon and change the value as appropriate. All users that are associated with this limit will 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, the administrator can click the edit icon to change the approval limit of a specific user.

Ultimate Approver

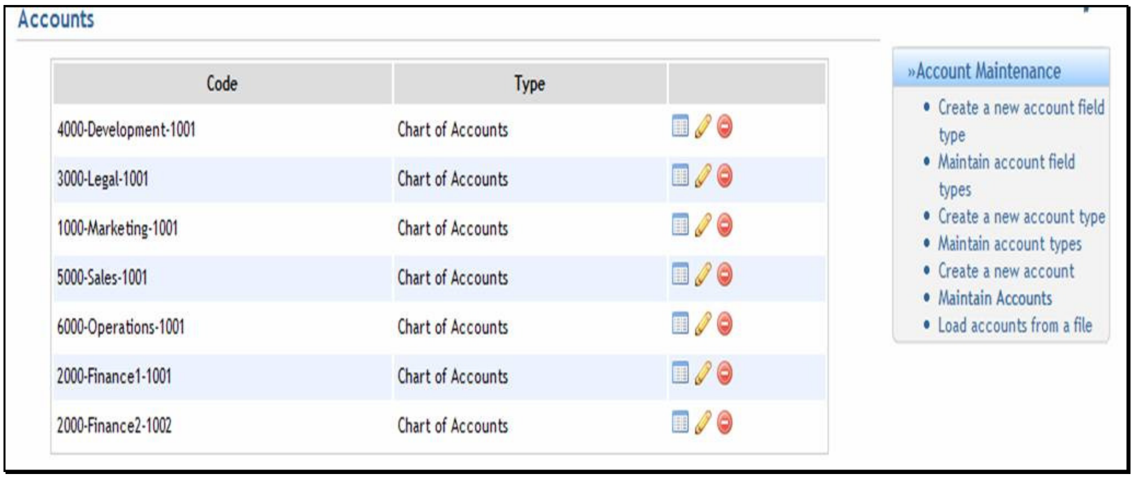
The system administrator should assign an ultimate approver that will be responsible for approving all requisitions where the system cannot determine the appropriate approver. Examples of where the system may use the ultimate approver:

- 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.

Account Management

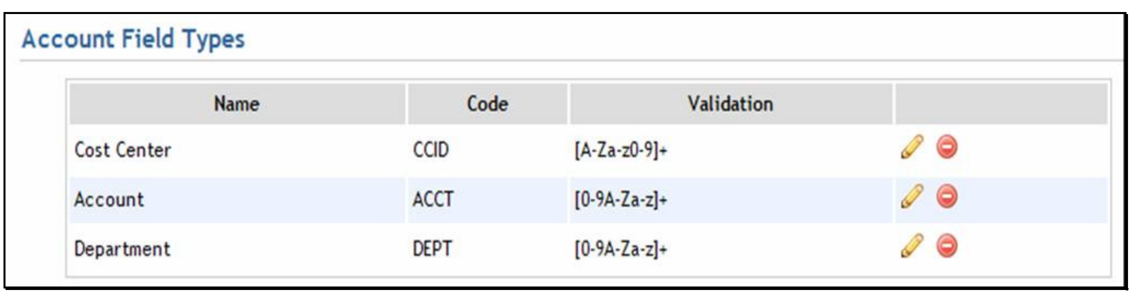
Coupa's account functionality provides a method for billing the appropriate account (typically a GL account) for the requisition. Each requisition must have an account in order for it to be processed. The accounts available to the end user are based upon the accounts loaded into the system by the administrator. 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 must be of a specific account type, and the account type is comprised of between 1 and 20 account field types. Each of these elements will be explained in this section. A sample list of accounts and the main account management screen is shown below.


Accounts

Code	Type	
4000-Development-1001	Chart of Accounts	
3000-Legal-1001	Chart of Accounts	
1000-Marketing-1001	Chart of Accounts	
5000-Sales-1001	Chart of Accounts	
6000-Operations-1001	Chart of Accounts	
2000-Finance1-1001	Chart of Accounts	
2000-Finance2-1002	Chart of Accounts	

Account Field Types

Account field types allow an organization to define the segments of an account string. Account field types are the first step in creating the accounting structure. Each account field type has a name, code and regular expression validation. In the example below, three account field types have been defined: Cost Center, Account and Department


Account Field Types

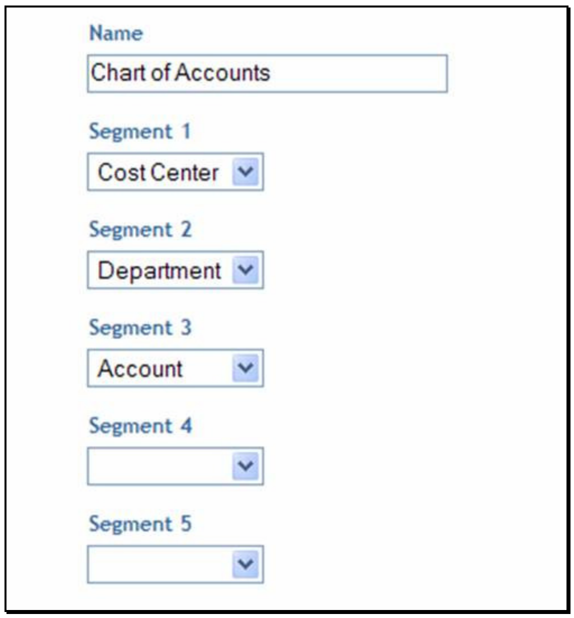
Name	Code	Validation	
Cost Center	CCID	[A-Za-z0-9]+	
Account	ACCT	[0-9A-Za-z]+	
Department	DEPT	[0-9A-Za-z]+	

To enter a new account field type, click the "Create a new account field type" link. Enter the name, code and regular expression validation. The validation on these 3 examples allows any combination of numbers, lowercase letters and uppercase letters. When the administrator creates a new account field type, any standard expression validation can be used.

When viewing the current list of account field types, click the "pencil" to edit. To delete the field type, click the minus icon. Please use necessary caution when deleting.

Account Types

Account types provide a structure for the accounts. After the account field types are created, the account type is defined and can be comprised of 1 to 20 segments. Each segment is a specific account field type. To create a new account type, click the "Create a new account type" link. Enter in the account type name and pick the field types in each segment. In the example below, the administrator is creating a account type with the name of "Chart of Accounts" and picked Cost Center (Segment 1), Department (Segment 2) and Account (Segment 3). All other segments are empty.



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

Accounts

After account field types and account types are defined, the administrator can manage the actual accounts that the requisitioner will use. The administrator can 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. The administrator picks the appropriate account type from the list in the drop-down. Once the account type is selected, the screen refreshes and lists the segments that are defined for the account type. The administrator should enter in the appropriate values and click the "Save" button. The system will check the values entered against the regular expression validation for each segment. The administrator will get an error if validation fails.

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 will show a status of the bulkload and take the administrator to the Data Sources page to view the success or failure of the account bulkload. All errors will be reported and available in a CSV output.

When viewing the list of current accounts, the administrator 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 application allows the purchasing department to easily keep the users up to date on the latest news from the department. The purchasing department authors a "blog" of the latest news and the information is syndicated to the Coupa home page. All blog 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 blog will appear on the user's home page.

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. The administrator views 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 will enable the PunchOut site to be displayed in the search results for the end user. A sample entry screen for a new site is shown below.