

COUPA PLATFORM TRAINING AND CERTIFICATION

COURSE DESCRIPTION

OVERVIEW

This 4-day instructor-led course provides students with the foundational concepts necessary to understand and take advantage of the possible configurations that the Coupa platform offers. Prior to attending class, students will be asked to complete about an hour of mandatory prework to ensure their success in the course.

Students are presented with demonstrations and practical exercises in a training environment that emphasize learning through hands-on labs with an objective to build targeted configurations. Each student has a dedicated Coupa training instance and a participant guide with detailed configuration concepts to help support learning and personal note taking.

At the end of the training, students take a 50-question exam that reinforces their learning from the week's instruction. Students who pass the exam receive a Coupa Platform Certification certificate.

AUDIENCE

A great class for anyone who works with or wants to learn about the Coupa platform. Roles include, but are not limited to: project team, procurement team, IT department, system administrators, system implementation managers, and power users (buyers, accounts payable, and contract administrators).

LEARNING OBJECTIVES

- Understand data relationships
- Load master data using bulk loaders
- Manage users and their relationships to other areas of the application to drive usability
- Build a chart of accounts (COA)
- Understand configuration options (requisitions and invoices) on approval chains to meet specific business requirements
- Report on data tables through views
- Create and edit configuration settings associated with Coupa administration tasks

DURATION

- ▶ 4 days

DELIVERY FORMAT

- ▶ Classroom
- ▶ In Person
- ▶ Virtual

COUPA PLATFORM TRAINING AND CERTIFICATION

COURSE DESCRIPTION

MODULES AND TOPICS

Coupa Tour

The view through your end users' eyes

User Configuration

Understanding standard roles
Building custom roles around common use cases
Managing content group relationships between objects

Data Elements Configuration

Setting up commodity structures
Configuring global settings in Company Information
Loading and managing master data

Custom Fields

Setting up and managing custom fields on data and transaction tables

Financial Setup

Building a sample chart of accounts (COA)
Creating user-viewable budgets
Managing billing account security rules

Suppliers

Creating supplier records
Using the Coupa Supplier Portal (CSP) as a supplier

Contracts and Items

Managing hosted items
Setting goals and reporting with Coupa Contracts
Creating pricing tiers of hosted items

Approval Chains

Understanding how to utilize approvals workflow to streamline processes through hierarchy approvals, basic approval chains, and dynamic approval chains

Buying and Buyer Action

Managing buyer-related activities to support requisition creation and PO management
Creating ad-hoc spot-buying events based on a requisition

Questionnaires and Web Forms

Using questionnaires to drive getting additional information
Using web forms to try business processes and service purchases

Accounts Payable (AP)

Using invoice input methods
Understanding the supplier's role in invoicing
Understanding the 3-way matching logic
Using tolerances to manage which invoices should be reviewed