

COUPA CONTRACT LIFECYCLE MANAGEMENT ADVANCED, TEMPLATE CREATION FUNDAMENTALS

COURSE DESCRIPTION

OVERVIEW

This 3-day instructor-led course provides students with the essential concepts necessary to understand how to create contract templates for use in the Coupa Contract Lifecycle Management Advanced (CLMA) power application.

Students are presented with an understanding of the components of a CLMA contract template, addressing the challenges and opportunities that CLMA's unique features provide. Through demonstrations and hands-on practice of CLMA template configuration and administration tools within the platform, students learn contract template creation using Instant Author and Power Author capabilities.

AUDIENCE

A great class for anyone who works with or wants to learn how to build contract templates in the Coupa Contract Lifecycle Management Advanced power application.

LEARNING OBJECTIVES

- Understand the start-to-end process of creating a contract template
- Gain an understanding of key terms and functions in template administration
- Create templates using Instant Author and Power Author features
- Follow the best practices for building and administering templates and data variables

DURATION

- ▶ 3 days

DELIVERY FORMAT

- ▶ Classroom
- ▶ In Person
- ▶ Virtual

COUPA CONTRACT LIFECYCLE MANAGEMENT (CLMA) COURSE DESCRIPTION

MODULES AND TOPICS

Understanding the CLMA Templates Data Structure in CLMA (UCM & Templates) Use of Word Documents
Formatting Template Content
Setting Up Data Variables

Software Usage
InstantAuthor to Load Templates
PowerAuthor to Edit & Refine Templates

PowerAuthor Variables
Set Up a Variety of Logic
Edit Template Content

Template Groups & Shared Logic Files
Set Up Template Groups
Use Shared Logic Files

Administer Templates

Administration

Closing
Final Comments Questions & Answers
Next Steps