



**State of Maine, Department of
Administrative and Financial Services**
eProcurement Solutions and Services

File 3 Deloitte — Proposed Solutions and/or Services: (Coupa)

RFP No. 202102021 | August 4, 2021





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August 4, 2021

Mr. Chad Lewis

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RE: Request for Proposals ("RFP") No. 202102021: e-Procurement Solution and Services File 3 – Proposed Solutions and/or Services

Dear Mr. Lewis:

On behalf of Deloitte Consulting LLP,* ("Deloitte Consulting", "we" or "our"), I am pleased to present this proposal for eProcurement Solutions and Services in response to Request for Proposals ("RFP") No. 202102021 that was issued on March 30, 2021. We have taken the time to carefully review the requirements, goals, and objectives, and have provided responses to the required sections within the RFP as they relate to our offering. We confirm this proposal is valid for a period of not less than 180 calendar days from the date of submittal.

We understand that the State of Maine, in coordination with the National Association of State Procurement Officials (NASPO), is seeking vendors with strong capabilities and prior eProcurement implementation and support experience. Through the partnership with Coupa, Deloitte would like to recommend Coupa as an industry leading eProcurement solution for consideration. Coupa is highly recognized by leading Industry Analysts including Gartner, Forrester, and Spend Matters. They serve over 2,000 companies and agencies around the world providing visibility on end to end source to procure processes, and reinforcing controls over all spend increasing efficiency, reducing risks, and improving the business bottom line.

Deloitte and Coupa are global leaders who serve the world's largest organizations with successful complex systems implementations. Deloitte is the world's largest consulting firm, a leader in systems integration, and a Coupa Global Elite Partner since 2016. With a superior product and our combined implementation skills and industry expertise, we have over 380 trained, certified, and experienced Coupa consultants who have successfully completed over 70 enterprise-wide implementations. We look forward to bringing this depth and experience to the State of Maine and participating NASPO ValuePoint entities. Deloitte has engaged with various public sector projects such as the United States Postal Service, American Red Cross, Brandeis University and others to deliver world-class Coupa solutions. We have a demonstrated governance structure, service delivery model, experienced staff, enabling support toolsets, and recognized industry standard methods that can be tailored to meet customers' needs and mode of operations.

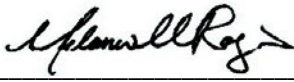
* As used in this document, "Deloitte" means Deloitte Consulting LLP, a subsidiary of Deloitte LLP. Please see www.deloitte.com/us/about for a detailed description of the legal structure of Deloitte LLP and its subsidiaries. Certain services may not be available to attest clients under the rules and regulations of public accounting. Deloitte DUNS number: 19121586, CAGE code: 1TTG5 and TIN: 61454513.

Mr. Lewis
August 4, 2021



We believe that Deloitte Consulting is the best organization to serve the State of Maine and NASPO ValuePoint participants with eProcurement Solutions and Services and we are excited to provide a robust service offering, competitive pricing, and generous discounts. We welcome your questions and feedback to refine the services described herein. Please do not hesitate to contact me at (571) 858-0101 or via email merojas@deloitte.com with any questions or comments regarding our response. Thank you in advance for your consideration.

Sincerely,

By: _____

Melanie Rojas

Managing Director
Deloitte Consulting LLP



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Glossary

.CSV – Comma-separated value

2FA – 2-Factor Authentication

AES – Advanced Encryption Standard algorithms

Amazon VPC – Amazon Virtual Private Cloud

AMS – Application Management Services

APM – Application Performance Management

AVRS – Automated Voice Response System

AWS – Amazon Web Services

AZ – Availability Zone

BCM – Business Continuity Management

CAIQ – Consensus Assessments Initiative Questionnaire

CAM – Customer Adoption Manager

CIDR – Classless Inter-Domain Routing

CLM – Contract Lifecycle Management

Cloud BSM – Cloud Business Spend Management

CRP – Conference Room Pilot

CSA – Cloud Security Alliance

CSP – Coupa Supplier Portal

Deloitte Consulting – Deloitte Consulting LLP

DPA – Data Processing Agreement

EBS – Elastic Block Storage

FIPS – Federal Information Processing Standards

HIDS – Host-Based Intrusion Detection System

IDP – Identity provider

ISMS – Information Security Management System

ISP'S – Internet service provider's

IT CMO – IT Compliance Management Office

IVRS – Interactive Voice Response System

LDAP – Lightweight Directory Access Protocol

MDM – Mobile Device Management



MFA – Multi-Factor Authentication

MSA – Master Service Agreement

MSA – Master Subscription Agreement

NCED – National Center for Employee Development

NIST – National Institute of Standards and Technology

NOC – Network Operations Center

OCM – Organizational change management

OIDC – OpenID Connect

PCI-DSS – Payment Card Industry Data Security Standard)

PII – Personally identifiable information

POs – Purchase orders

QRG – Quick Reference Guides

RAID – Risks, Actions, Issues, and Decisions Log

REST- Representational State Transfer

RPA – Robot Process Automation

RPM – Risk and Performance Management

S3 – Simple Storage Service

SaaS – Software-as-a-service

SAML 2.0 – Security Assertion Markup Language

SDLC – Systems Development Life Cycle

SFTP – Secure File Transfer Protocol

SIT – System Integration Testing

SMPs – Subject Matter Professionals

SOC – Security Operations Center

SOW – Statement of Work

SOX – Sarbanes-Oxley Act

SP – Special Publication

SSL – Secure Socket Layer

TCO – Total Cost of Ownership

TLS – Transport Layer Security

TSLC – Technology Solutions Life Cycle



UAT – User Acceptance Test

UPS – Uninterruptible Power Supply

VPC – Virtual Private Cloud

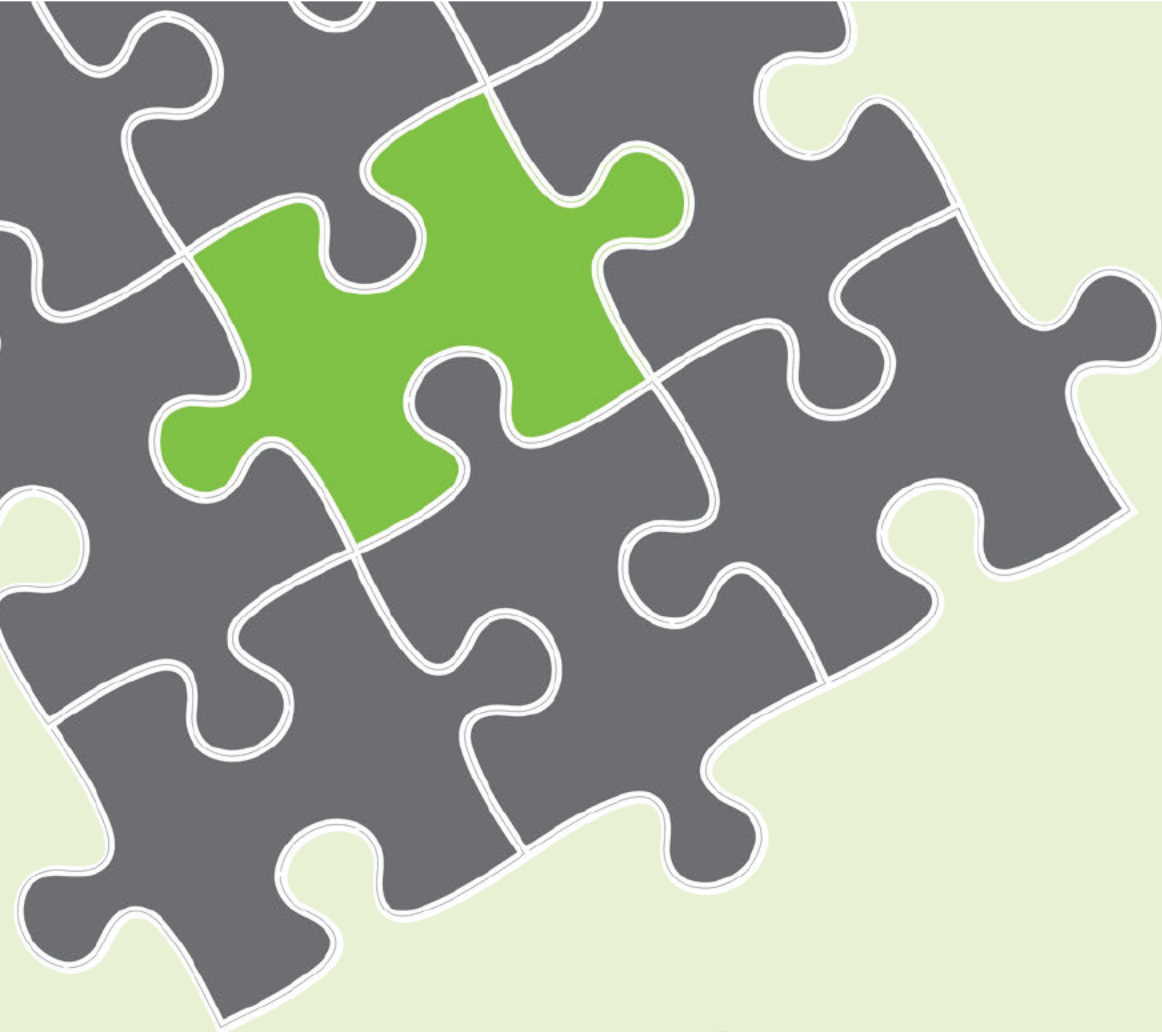
W3C – Worldwide Web Consortium

WAI – Web Accessibility Initiative

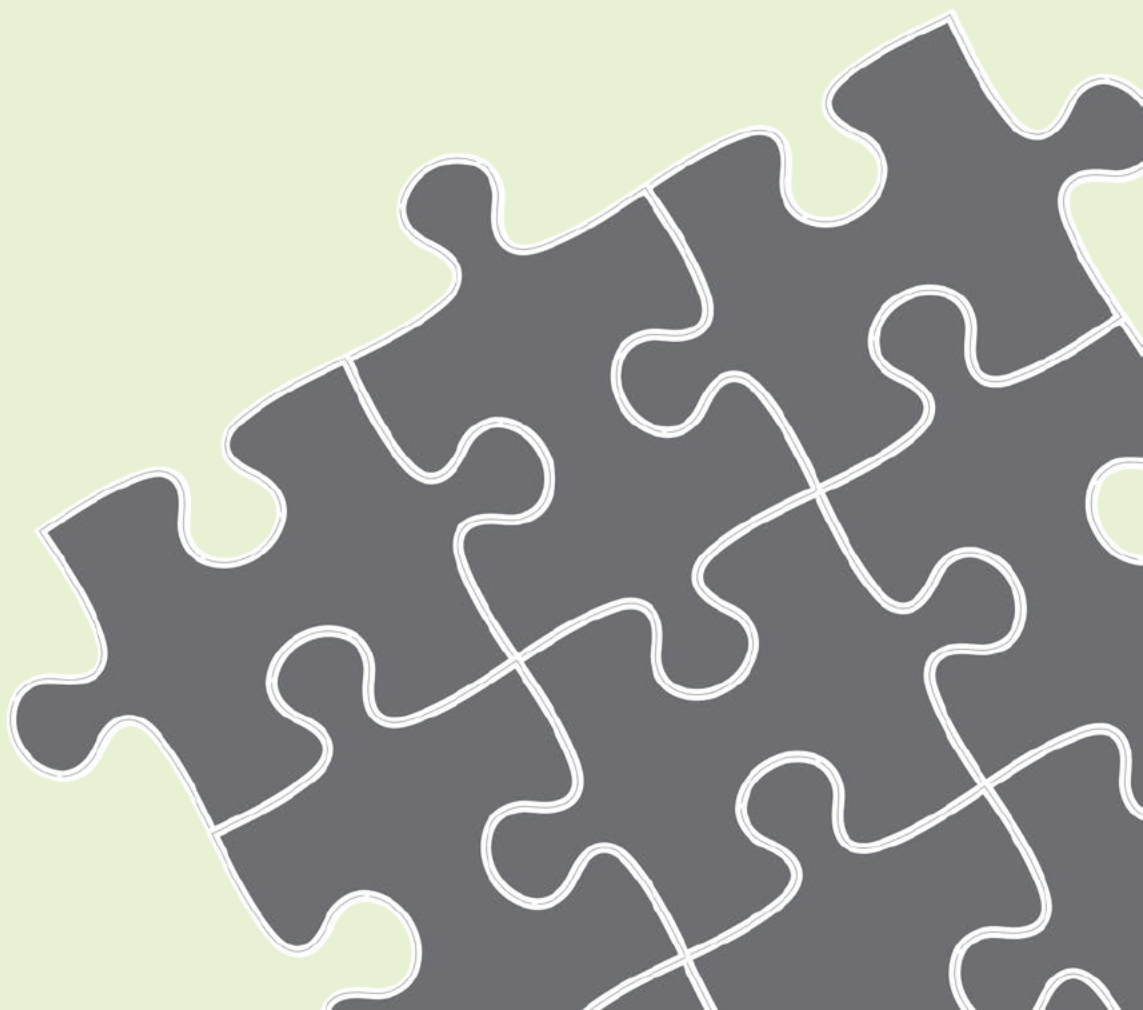
WCAG – Web Content Accessibility Guidelines

WCF – Working Capital Funding

WP – Work products



1. Services to be Provided





Proposed Solutions and/or Services

Section III

1. Services to be Provided

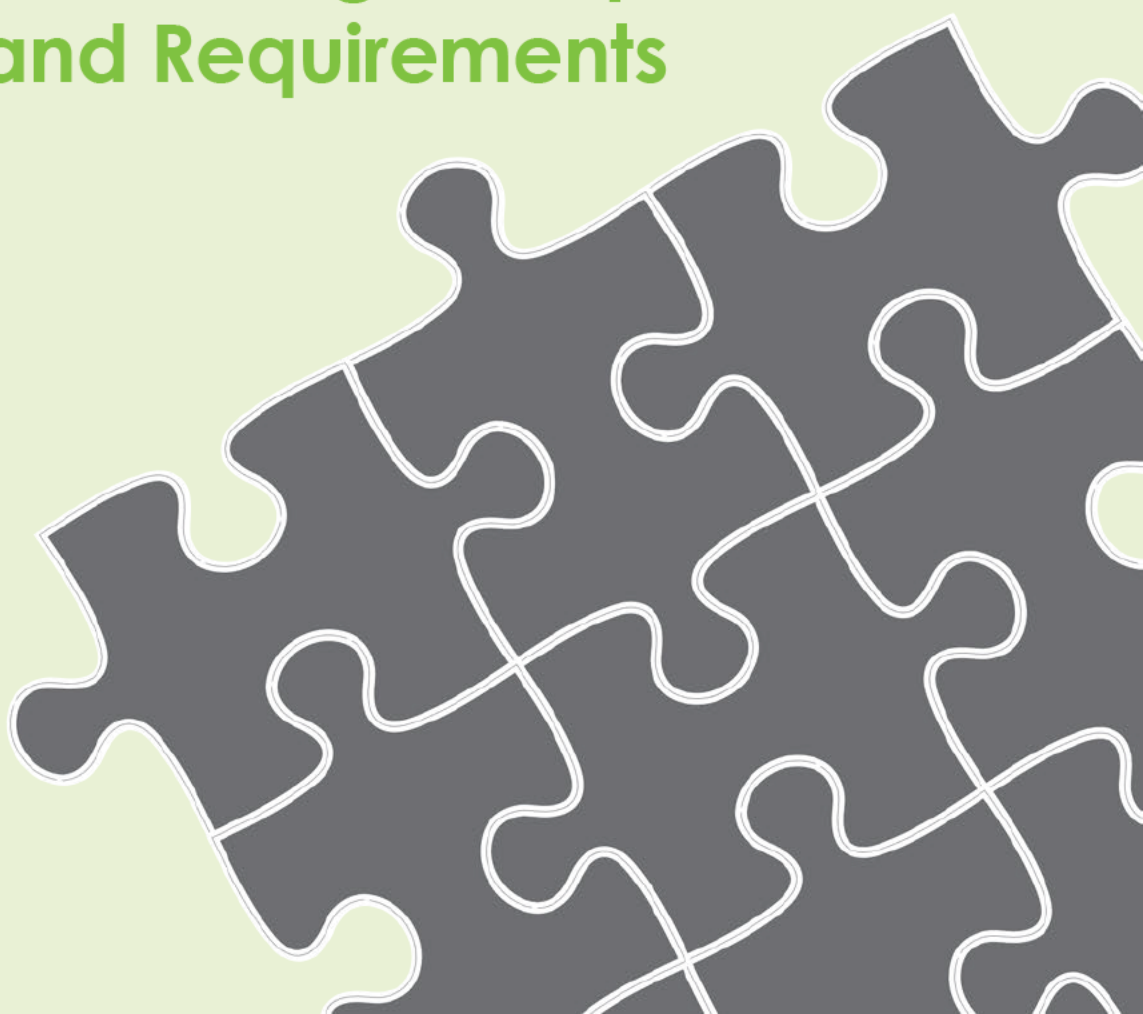
RFP 202102021: Section III – Proposed Solutions and/or Services, 1. Services to be Provided, Page No. 46

1. Services to be Provided

Bidders are to discuss the Scope of Services referenced above in Part II of the RFP and what they will offer. Bidders are to:

- Use the Excel Workbook Exhibit 1 (RFP 202102021 – Requirements Traceability Matrix (RTM)) to respond to the RTM requirements as stated in PART II; and
- Provide narrative responses to all “Inline Narrative” requested information stated in PART II of this RFP.

Bidders are to give particular attention to describing the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.



A. Guiding Principals and Requirements



A. Guiding Principals and Requirements

RFP 202102021: Section III – Proposed Solutions and/or Services, A. Guiding Principals and Requirements, Page No. 12

A. Guiding Principals and Requirements

Bidders are required to follow these guiding principles and requirements in responding to the work contained in this RFP and any resultant contract.

1. Key Solution Functionality Elements

RFP 202102021: Part II – Scope of Services to be Provided, A. Guiding Principals and Requirements, Page No. 12

1. Key Solution Functionality Elements

The electronic procurement solution must not only address the functionalities and processes described in subsequent sections but also bring specific capabilities that provide the following high-level functions to Participating Entities:

- Single point of entry – a single initiation point for all procurement activity.
Smart routing – a rules engine that electronically guides users down the appropriate procurement pathway.
- Compliance – a technology solution that has business rules and controls “baked in” (See APSPM).
- Portal – a solution that integrates access, collaboration, community, personalization, resources and information for both buying and supplier users.
- Open marketplace environment – an electronic environment of goods and services that provides a “catalog of catalogs” like shopping experience with access to content in Participating Entity issued contracts, external Cooperative Contracts and external internet retail marketplaces.
- Integration – batch and real-time with existing financial management and other core systems.
- Workflow – a configurable, rule/role-based approval automation.
- Document management – automated solution to create, transact and store documents.
- Reporting, dashboards and data visualization – a solution to provide detailed reports and interactive visual analytics.
- Configurable – to address the specific and varying needs/uses of organizations within a Participating Entity both as an enterprise and individually.
- Transparency – provide public and internal visibility into purchasing activity and outcomes.

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a brief description of how the proposed solution addresses each of the high-level functions listed above.

Single Point of Entry

Coupa’s Business Spend Management (BSM) platform is the single initiation point for procurement activities designed to give the Lead State and Participating Entities significant advantages and a complete ownership of procurement transactions. With Coupa’s user friendly interface, 100% user adoption is quickly accomplishable across the lead state’s (and participating entities) organization, partners, and suppliers. The Lead State and Participating Entities will also have unparalleled visibility into every transaction’s lifecycle so you can start realizing the benefits of your investment within a few weeks.

Coupa Procurement provides capabilities for an organization to create a consumer-like shopping experience for their workers, allowing them to requisition and purchase products and services using the organization’s pre-negotiated prices. Coupa Procurement includes functionality like catalogs, budgets, and suppliers.

Smart Routing

Coupa is designed with the end-user in mind and its home page asks one simple question, ‘What do you need?’ Coupa helps users get visibility and control of their spend by bringing the ease of consumer shopping to its procurement experience. Coupa guides employees across the buying process, surfacing preferred products and services to alert employees to discounted pricing and other advantageous terms. Coupa also eliminates rogue spending and increases savings by enabling organizations to lock down what users can see and purchase based on role, location, system permissions, and contracted terms and conditions, in real-time. This means when a user

searches for their need they will only see what they are entitled to. The pre-population and defaulting of critical requisition-specific information also expedites cycle times, heavily reduces errors, and further eliminates the possibility of over-spending. Because of Coupa's design and mobility, users can raise requisitions exceptionally fast which means they can focus on their core roles within the business.

The homepage search is one of the main ways to find things to add to the cart in Coupa. Coupa search uses weighted full-text indexing and is sorted by relevance by default. Like many search providers, Coupa continually evaluates its search algorithm to maximize relevance, so the algorithm may be updated from release to release.

Coupa searches:

- **Catalog Items:** This excludes items in punchout sites or iRequest sites. For items to show up in search results, they must:
 - Be marked as purchasable on the item record
 - Not be associated with restricted contracts (contracts restricted by content groups)
 - Be available from at least 1 supplier with a valid price
- **Accessible forms:** Coupa includes enhanced searchability for procurement forms. When a customer searches for a form to complete, it appears as a top search result.
- **Punchout items** are included in item searches when Coupa Open Buy has been configured.
- **Buying policies:** Coupa searches the policy name and description. These results are shown beneath the catalog item and form results.
- **Punchout sites:** Coupa also searches punchout site names.

When performing a search, the search results screen is displayed with item cards and a set of filters.

Compliance

One of the cornerstone values of the Coupa BSM platform is that customers define their organization's buying policies within the related process in the platform. This facilitates the information (or policy) is at the employee's fingertips when, and where, they need it most. Employees can browse buying policies in the Coupa platform and configure buying policies to appear as a part of relevant search results. The Coupa platform will provide a user-friendly interface and process that fulfills customer governance requirements and processes.

We utilize buying policies to help customers understand the organization's policies and help facilitate they request the right items and services. Customers can view policies:

- In their search results when they search for keywords tied to the policy
- When browsing through one of the policy's related commodities
- In their cart and requisitions when they've added commodities tied to one of the policies
- From the policy's dropdown on the home screen, located next to web forms

Portal

Coupa is leading the charge with ease of use modeled after consumer services like Amazon and Facebook. Coupa has the easiest to use purchasing portal needed and everything is 100% configurable by customer business users with no programming skills or experience needed. The user interfaces of competing products were designed for the Super User; Coupa's UI was designed for the masses. Thanks to Coupa's intuitive UI, training has been unnecessary for some customers.

As a user-centric platform, Coupa leverages smart capabilities to lessen the workload of the user. Coupa has the highest user adoption rates in the industry, with customers experiencing 90%+ adoption rates due to its design philosophy. Coupa makes it easy for users at every level to get things done, often without ever having to login. Additionally, Coupa is able to onboard employees, suppliers, administrators, and approvers quickly with little to no training, which means customers can get more spend under management fast. When Coupa says the best UI is no UI, it means users should only have to interact if they're adding value to a transaction—otherwise let Coupa do the work. With actionable email, SMS, and push notifications driving the shortest transaction cycle times, it's no wonder Coupa is becoming the gold standard for usability. The world today is mobile and if it can't be done on a phone right now, it may never get done. Coupa understands this and makes it easy for everyone in the organization to get things done on their phone, fast. From email approvals to automated expense tracking, Coupa's mobility is a key enabler to successful user adoption rates.

Open Marketplace

Coupa's search capability allows users to easily complete cross catalog searching between internally hosted and punchout catalogs from a single user interface. Consider leveraging Coupa's Open Buy functionality. Coupa Open Buy makes it easy to search punchout supplier items using Coupa search. Users can find what they're looking for without having to punch out to the supplier's website.

The homepage search is one of the main ways to find things to add to the cart in Coupa. Coupa search uses weighted full-text indexing and is sorted by relevance by default. Like many search providers, Coupa continually evaluates its search algorithm to maximize relevance, so the algorithm may be updated from release to release.

Coupa Open Buy (such as Amazon Business) gives employees embedded visibility and instant access to millions of items beyond the catalogs managed by their employer in the Coupa platform. This helps reduce the rate of 'item not found' and decreases the likelihood of employees buying outside their organization's approved processes. In addition, one-time purchase needs (sometimes called "spot buys") can be handled efficiently by an employee without consuming procurement or accounts payables team resources.

Coupa customers can turn on punchout link connections to the Amazon Business marketplace. Coupa Open Buy capability expands the technology collaboration to streamline the employee buying experience and increase organizational compliance.

Coupa's flexible configuration capabilities give customers the ability to tailor the Coupa Open Buy solution to meet their organization's specific needs. For example, customers can turn on Amazon Business items results as part of product searches for spot buy type needs and item comparisons, or only when catalog searches return no results. Additional configuration of commodity-based workflows prevents restricted items from being purchased without additional approval.

Coupa customers benefit from the Amazon Business e-commerce expertise and gain visibility into full product catalogs on an established multi-seller marketplace, which helps eliminate the need to manage individual catalogs.

Coupa Open Buy lets users consolidate all supplier punchouts with customer Coupa items into a single unified search. This makes it easier for users to find the items they want and know when to use a punchout vs buying natively in Coupa. With Open Buy enabled, users will get a seamless, integrated experience when searching for items.

There are a number of key benefits to including punchout items in Coupa's item search:

- No need to work with different vendor sites and search engines
- Rely on search instead of trying to guess the correct punchout to use
- Easily compare similar items from different punchout suppliers
- Control access to specific users, departments, or regions, just like punchouts today

Integration

The power behind Coupa is its incredible flexibility. Quite simply – Coupa is open where others are closed. Coupa's open architecture allows customers to integrate 3rd party systems on the market. The service can integrate with limitless types of software applications – from financial/ERP to HR to Inventory Management.

The Lead State and Participating Entities can use the Coupa API, flat files, web services, custom code, or integration providers to make seamless connections between Coupa and your ERP platform. Our integration team brings many years of experience as well as an extensive toolset to your project to make sure that your integration phase goes smoothly. Each Coupa implementation includes a data modeling exercise to define the data flows needed to support end-to-end business processes across Coupa and the necessary 3rd party systems. We support all ERP systems and have had extensive experience with a variety of systems. We have integrated with thousands of business objects across our many customer implementations, with millions of integration data elements flowing through our platform on a monthly basis.

Coupa offers capabilities to integrate with virtually ERP vendors. Coupa can connect with the flexibility needed to match with multiple ERP systems, using industry standards with sFTP and REST-based APIs. This open approach to integration has made it possible for Coupa to partner with all the integration technologies in the market to deliver rapid-deployment solutions for existing ERP customers. These technologies simplify the task of delivering Coupa processes and data to ERP integrations. Over time, maintenance of these integrations is also vastly simplified. Coupa understands the complexity that comes with ERP systems by providing multiple methods to untangle not only integrations, but also usability while maintaining the data, processes, and compliance integrity ERP systems require.

Each customer has different requirements for how they want to connect with their ERP and external systems. Customers should evaluate their current integration strategies to determine the best approach to integrate with Coupa, and our professional services are here to help you find the best solution.

Workflow

Approval chains are configurable by a business administrator and will determine the approval workflow for requisitions, invoices, forms, and other records. Coupa has an easy to use administration panel for a non-programmer to perform maintenance to the environment including creating approval rules based on specific business processes. Approval rules can be driven by various conditions, such as department, category, account, line description, amounts, etc.



Different approval chains can be configured for different types of records in Coupa. Approval chains are configurable by business administrator and will determine the approval workflow. Coupa offers system-configured automatic escalation and can have a flag on the requisition escalating approval to a different approval chain.

Coupa has an easy to use administration panel for a non-programmer to perform maintenance to an environment including creating approval rules based on business processes. Approval rules can be driven by various conditions:

- Management Hierarchy
- Departments
- Item/Item Description
- Commodity Codes
- Accounting Values
- Supplier and more, including custom fields

For each approval chain that is configured, users can set conditions that a record must meet before the approval chain is applied. If a user sets two or more conditions, it can be configured to require ALL or ANY of the conditions for the approval chain to be applied.

Document Management

Coupa allows users to create and store all types of transactions related to spend management, including requisitions, purchase orders, invoices, receipts, and more. File attachments can also be uploaded throughout the application to facilitate appropriate documents are captured for reference.

Reporting, Dashboards and Data Visualization

With Coupa Reporting and Dashboards, customers can take a pulse of their spend instantaneously. Coupa reporting, dashboards, and benchmarking are included in the subscription to Coupa, at no additional cost. Customers can control access to these dashboards and reports based upon their organizations' individual needs. Coupa's executive dashboards and reports allow executives to monitor and measure purchasing performance. With real-time graphical views, Coupa reports and dashboards provide critical insights to spending management performance, supplier performance, liquidity, and more.

Coupa provides additional reporting, beyond that provided in Coupa's Business Spend Management platform, with in-depth analytical reporting and unique drill down into the Coupa solution, by offering 'Coupa Analytics'. This advanced analytics capability is completely configurable and allows for the creation of your unique and specific spend reports and dashboards required. 'Coupa Analytics' brings the same intuitive interface to spend analysis as the rest of the Coupa platform. This additional purchase has 'pre-built' dashboards and reports for Procurement, Finance and Business Managers that are designed to let users configure reports off of these templates and address specific drill down questions. Developed to be used by business users you do not need IT to customize reports for you, you 'configure' with 'drag and drop' capabilities to create the reports and dashboards you want, enabling powerful reports that will enable you to make better spend decisions.

In addition to a large suite of reports, Coupa also includes over 20 Success Metrics covering the broad areas of Savings, Efficiency and Usage, that gives insights into your spend and helps run your business more effectively. With the success metrics, you can monitor status versus goals and trends. You can create custom dashboards with the metrics that matter most to your organization.

Configurable

Coupa is the only truly business-owned application. Source code does not need to be changed, and no programming experience is required for clients to configure and maintain the Coupa application. Outside of integration, a business administrator can make ALL configurations and customizations in the system. Coupa configurations can take a matter of minutes to create by a business user. Custom fields and webforms are done via drag and drop, and approval rules are 100 percent user interface configurable. All custom fields are reportable, can drive approval rules and automatically available as part of our API for integration.

There are no Coupa or third-party services needed to configure our system after implementation. During implementation Coupa will configure and train your users so that you are not dependent on us as a vendor, or 3rd party services to administer your system. This allows Procurement and AP to continuously look at ways of improving process and incorporate user feedback, without the concern of IT resources, cost, and timelines. Some of the most commonly used functions under Coupa's setup interface include:

- Organization Setup (Organization information, Users, Departments, Commodities, Roles, Content groups, Approvals, Delegated approvals, Units of measure, File upload status, Inventory warehouses, Inspection codes, Warehouse types, API keys, Security controls, Custom fields, Dashboard controls)
- Financial Setup (Accounts, Chart of accounts, Customize PO, Invoice tolerances, Receiving tolerances, Budget periods, Budget lines, Currencies, Exchange rates, Tax codes, Payment terms, Shipping terms, Quickbooks sync)
- Purchasing Tools (Manage requisitions, Manage purchase orders, Manage RFQs, Buying policies, Questionnaires, Web forms)
- Payable Tools (Manage invoices, Export to accounting)
- Suppliers (Suppliers, Contracts, Supplier network directory, Supplier network catalogs, Items, punch-out sites)
- Logistics (Receive items, View receipts, Inventory transfers, Inventory adjustments)
- Content Control (Public tags, Reported employee reviews, 'Ask an Expert' categories, Home page content, Price comparisons, Featured iRequest sites)
- Reporting (Dashboard, Spend alerts, Purchase order charts, Budget report, Unreceived orders report, Uninvoiced orders report, Accrual report, Requisition line report, Purchase order line report, Invoice line report, Expense line report, Supplier item report, Inventory history report, On-hand balances report, Asset tracking report)



Transparency

Coupa delivers full transparency of all actions. Employees have full visibility of all of their requisitions and can see their current status, including the approval status and a link to the purchase orders that have been issued.

- Coupa's Expanded Search – allows you to scope your search to the specific transaction type based on your entitlements and permissions. The expanded search including Reqs, Orders, Invoices, Contracts, Suppliers, Sourcing events, and payment batches. This feature improves user adoption and streamlines the search across the platform.
- Coupa's user-related document search includes the ability to look up users in your organization to get quick access to documents that you have in common with them.
- Activity page – provides quick access to your transactions across the platform (based on permission) including requisitions, orders, change orders, service/timesheets, expense reports, invoices, receipts, returns, contracts, etc.

2. User Experience

RFP 202102021: Part II – Scope of Services to be Provided, A. Guiding Principles and Requirements, Page No. 13

2. User Experience

The Solution must provide a user experience that is simple, direct and effective. Characteristics of this experience at a minimum must include, but not be limited to:

- Capability that allows user personalization of their initial screen based on their needs or use of the Solution.
- Intuitive navigation that guides users to the appropriate Solution component with as few clicks as possible.
- Wizard-driven capabilities that can direct the user to the appropriate process or functionality of the Solution.
- Portal that informs users and supports user work management.
- Functionality optimized for mobile access and use.
- Workload management functionality that will allow the re-assignment of work to another user. This includes, at a minimum, purchase requests, solicitations and contracts.
- Role-based functionality for drafting, review and approval, evaluator and other processes.

Response requirement:

- RTM: N/A
 - Inline Narrative: Bidders must provide a brief description of how the proposed solution addresses the user experience characteristics listed above.
-

Personalization of Initial Screen

Coupa takes great pride in being the market leader in ease of use and ease of administration. Customers can add their own logos, branded color, and have extreme flexibility in configuring Coupa in adding home page content (help, deployment comments, etc.), custom fields and configuring workflow(s). Most homepages will be standardized by the administrator, but end users can set their preferences from the interface to determine favored settings related to language, currency, notifications, date & time formats.

Intuitive Navigation

Coupa strives to achieve a highly intuitive user interface to improve user adoption. Customers report unprecedented adoption of the platform due to its ease of use. Coupa was designed from the start around a consumer-like purchasing experience. Our customers provide positive feedback on the user interface and we work with our customers to continue to improve with each release. The end-user interface is highly configurable to facilitate that each user is not presented with more features than necessary.

The solution was designed to minimize the number of clicks required to complete actions. For example, Coupa allows users to flip a Coupa Sourcing event into a contract record with a single click. From the Award phase of a sourcing event, users can select the type of contract being requested and directly enter a contract request and document assembly process. Items and services being awarded are also made part of the contract record without additional actions from the user.

Wizard-Driven Capabilities

Coupa's BSM offerings are so straightforward as to not require wizards. Coupa has focused significantly on the user experience of shopping, and Coupa's process is much like the consumer experiences used every day (e.g. Amazon, Bestbuy.com, Google, etc.). Training or wizards are not required to perform many functions and processes within Coupa. Coupa helps users get visibility and control of their spend by bringing the ease of consumer shopping to its procurement experience. Coupa guides employees across the buying process, surfacing preferred products and services to alert employees to discounted pricing and other advantageous terms.

Informative Portal

Each user's landing page provides the user with the necessary information to complete his/her transactions within one unified portal. Work management is supported by Coupa's holistic view of requisitions, purchase orders, invoices, sourcing events, and suppliers. The user can track these records using reports, dashboards, a to-do list, approvals, notifications, etc. directly from the home page.

Mobile Optimization

Coupa is 100% accessible through mobile devices, whether it is through the Coupa mobile application or using a mobile web browser. The Coupa mobile application is available via the App Store for both Android and iPhone and is included at no additional charge with Coupa.

Workload Management Functionality

Admins can reassign user roles or groups, document ownership (invoices, requisitions, budgets, etc.), and approvals (delegate approvers, Ultimate Approvers, and approval chains). Coupa's User Reassignment feature allows tasks and documents to be reassigned to other users. Lead State and Participating Entities administrators can:

- Monitor if the reassignments are successful or unsuccessful
- Monitor which users have had their documents and responsibilities reassigned and who the documents have been reassigned to
- Create a reassignment task

Role-Based Functionality

Role-based functionality is a core part of Coupa used to determine access to data related to drafting, reviewing, approving, evaluating, etc. When connected to the Coupa application, access to the functionalities and data is restricted by roles and content groups:

Roles – Comprised of sets of permissions throughout the platform. Coupa provides a set of roles and additional roles can be created by copying or modifying an existing role. From there, users are assigned a specific role. Additionally, Coupa can restrict access to almost any interface feature, including the content that the user sees, based on roles, privileges, and content groups.

Typical roles include Guest, Admin, User, Buyer, Accounts Payable, Central Receiving, Accounting Supervisor, Edit as Approver, Inventory Manager, Expense User, Expense Auditor, Expense Processor, Supplier, Dashboard, CFO Role, Split Accounting, and Superadmin.

Content Groups – The Coupa content group functionality is a way to target and secure specific content for specific users. Security zones can be established by creating content groups. This limits access to catalog items, punchout sites, How to Buy policies, and WebForms. Users can be assigned to content groups and each contract can be associated with specific content groups. A contract will only apply to users who are members of the contract's associated content group(s).

3. Bidder Best Practices and Roadmap

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3. Bidder Best Practices and Roadmap

Participating Entities are seeking a best value opportunity and Bidders should consider best practices and alternatives including the cost benefits of alternative solutions. Proposed solutions must demonstrate creativity, innovation, benefits and the outcomes brought to Participating Entity. For any project initiated by a Participating Entity the Contractor will:

- Incorporate new Solution version releases or new features/tools when they are available.
- Ensure that the Solution is utilizing the latest technologies.
- Ensure that updates happen in a timely manner.
- Present alternative processing approaches, services, methodologies, business processes or any other best practices to the Participating Entity for consideration of adoption that demonstrates a commitment to continuous improvement.
- In addition, the Contractor must constantly assess and recommend opportunities to reduce costs associated with any aspect of the contract, including project implementation and other services. The Participating Entity is not obligated to accept and implement any recommendations.

Response requirement:

- RTM: N/A
 - Inline Narrative: Bidders must provide a brief description of how the proposed solution addresses each of the bullet items above. Additionally, Bidders must include the current 3-year product roadmap and describe in detail how it demonstrates continuous improvement for the Participating Entity.
-

New Solution Releases

Coupa delivers three major releases per year, as well as maintenance updates and daily updates. Coupa has standardized the release process such that 100% of customers will be on the most current release of the platform. The major releases, maintenance updates, and daily updates will automatically be deployed to sandbox and production environments on specified dates. Coupa refers to this mechanism as the “auto-update train.”

- **Major Releases** – Coupa is cloud-based software-as-a-service (SaaS) which means the service is under constant improvement, and Coupa releases with a regular cadence. Coupa provides regular updates for the current version every two weeks and rolls out major releases three times per year, in January, May, and September.
- **Maintenance Updates** – Maintenance updates allow Coupa to address issues that affect customers in a scheduled manner. Code changes are signed off and pass internal quality certification every other Friday. That same Friday, Coupa deploys the maintenance update to its own internal production environment at Coupa. Release communications include release notes, explaining the changes in the maintenance update.

- **Daily Updates** – Daily updates address critical issues that impact the majority of Coupa customers. Even though they're rare, it's in a customer's best interest to get these updates as soon as they're ready. Since a daily update is much smaller than a maintenance update, there's no risk to the production instance. Coupa will update both sandbox and production instances at the same time.

Use of Latest Technology

Coupa has extensive smart tech embedded throughout the platform. The Coupa model is based on pragmatic innovation with a mindset of selecting the right technology for the business use case vs. technology for technology's sake. Coupa has a big data set, built upon 2.3T+ of customer contributed spend, that is used to power its AI/ML capabilities and help create community value.

Here are some examples of how Coupa uses AI/Machine Learning across Coupa (all in production):

- Fraudulent Spend Detection
- Contingent Worker Resume Matching/Selection – Risk Insights and Prescriptions
- Spend Data Classification – Supplier Insights and Prescriptions
- Commodity Insights and Prescriptions
- Operational Insights and Prescriptions
- Approver Insights and Prescriptions
- Prescriptive Sourcing
- Digitizing Invoices and Auto-Template Creation

Here are some examples of how Coupa uses other “Smart” technology across Coupa (all in production):

- Procurement (Smart Search Recommendations, Open Buy cross-catalog search, and Image Search Recognition using Amazon Recognition)
- Expense Management (Voice Expensing, Automatic Traveler Geo-Location and Assistant, Email=>Expense)
- Inventory Management (Voice Activated Inventory Amazon Echo/Alexa)
- Supplier News Sentiment (Microsoft Cognitive Services and IBM Watson)
- Collaboration (Slack approval processes and SMS technology)
- Real-time Shipment Tracking

Key smart capabilities in the process of development include fraudulent spend detection expansion, automated data analysis (i.e. contract documents), task effort reduction (i.e. order subscriptions and supplier active profile management), collaboration (MS Teams, Slack), process builder scenario expansion, and many others.

Timely Updates

Upgrades and maintenance are included in the subscription to Coupa's cloud service. There are no additional fees assessed. Updates are rolled out every three four months, bi-monthly, or daily depending on type and necessity.

Major releases allow Coupa to roll out new features and functionality in a controlled manner. To help plan for each major release, Coupa provides visibility and predictability with its release schedule. This provides organizations ample time to plan their upgrade activities and test the release before it goes to production on their specified release date.

Alternative Best Practices

Coupa and Deloitte offer many best practices and continuous improvement processes to new organizations that adopt the solution. Best practice thought leadership, education webinars, and customer roundtable discussions are available to all Coupa customers. The following factors are generally recommended to facilitate highly successful adoption in the shortest possible time:

- **Continuous Process Improvement:** Through our partnership, Deloitte introduces its sourcing and procurement transformation capabilities to assist the Lead State and Participating Entities with process standardization and optimization by leading industry practices. [REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
- **Executive Leadership:** An executive champion owns the project and facilitates that other senior managers and their staff are involved. Change is difficult, but acceptance easier if direction and encouragement are coming from the top.
- **Focus on Success:** Oftentimes, people lose focus of the end goal on the project and get caught up in the details. At the start of the project, Coupa and Deloitte will help you define success criteria. These metrics will be used as the baseline of the Lead State and Participating Entities' journey to financial success and remind all stakeholder of the ultimate goal.
- **Communication and Change Management:** Communication throughout the project team is essential, but it's important to think beyond such communication. Be very careful about what does and does not get communicated to the larger organization—beyond the project team. Be sure to control this messaging and be sure that you, as the core project team, are communicating a consistent, positive message.
- **Resource Availability during Discovery:** The purpose of the Discovery Sessions is to understand the business needs and design Coupa to your configuration. Resources with appropriate expertise will need to attend sessions and follow-up on open issues.
- **Early Capture of Data:** Coupa is pre-configured based on industry standards, which leads to quick implementation. Early capture of the data is crucial to success, allowing customer-specific data to be tested throughout the project.
- **Supplier Engagement:** Early communication with Suppliers is critical. Coupa and Deloitte will work with you to make sure that your suppliers are onboarded according to our best practices. Coupa's supplier enablement is faster and less confrontational with suppliers due to zero fees and ability to connect directly to the instance of the Coupa solution or through the Open Business Network.



[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]



- Participation in user acceptance testing: The more engaged users are in testing, the better the system is adopted. Testing cannot be rescheduled after it has begun due to resource conflicts.

As Coupa is a user-centric platform which carries the Participating Entity success metric on user adoption, it believes the smarter the platform, the less work users need to do. Coupa makes it easy for users at every level to get things done, often without ever having to login. The Lead State and Participating Entities can get employees, suppliers, administrators, and approvers on board quickly with little to no formal training. Coupa has the highest user adoption rates in the industry, which means customers can get more spend under management fast. When Coupa says the best UI is no UI, it means users should only have to interact if they're adding value to a transaction. With actionable email, SMS, and push notifications driving the shortest transaction cycle times, Coupa has been named as the gold standard for usability by leading analysts including Gartner, Forrester, IDC, and Spend Matters. Coupa understands the importance of mobile users and makes it easy for everyone in the organization to get things quickly done on their phone. From email approvals to automated expense tracking, Coupa's mobility is a key enabler to successful user adoption rates.

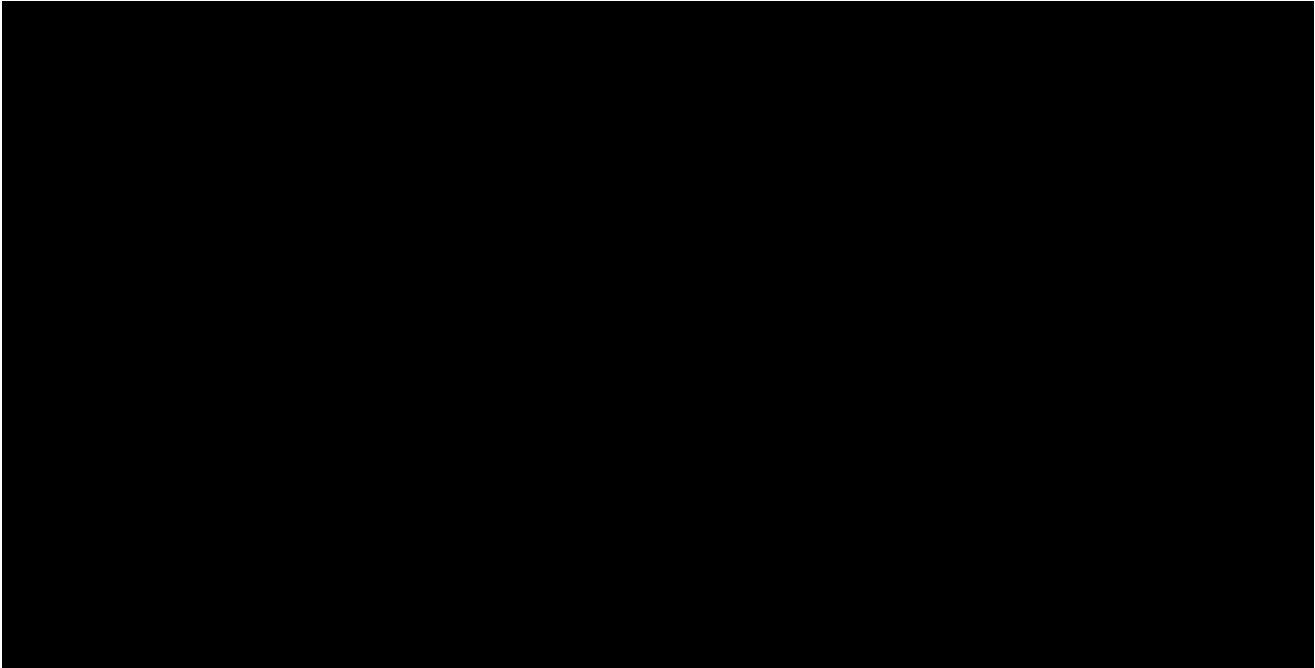
Cost Reduction

We believe cost reduction is typically attained through a two-step approach with the first step focusing on utilizing category specific sourcing knowledge combined with spend analytics to allow the Lead State and Participating Entities to set the appropriate savings target based on existing market conditions and negotiate the best price and contract provisions with suppliers. Deloitte's proven Procurement Central™ capabilities is well suited to accelerate the first step.

[Redacted text block]



- [Redacted list item]
- [Redacted list item]
- [Redacted list item]



[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Once savings are negotiated and “locked in” via a contractual agreement, we would recommend the Lead State and Participating Entities to proceed to the second step by leveraging Coupa to drive contract compliance and eliminating maverick spend, i.e. non-contractual spend. Savings can be maximized by emphasizing the following areas which are readily supported by Coupa’s existing functions:

- Compliance – Every compliant purchase guarantees the standard across pre-negotiated contracts, catalog, and policies to facilitate the user is guided to the right item/service needed to complete their source-to-pay needs.
- Price Dispersion – Only achievable through Coupa, generally yielding additional savings of 8-15%. Layering suppliers across certain spend categories to promote competition in the marketplace.
- Coupa Insights allows customers to track savings achieved using Coupa versus legacy solutions by measuring time savings, policy compliance, and corporate card adoption.

Product Roadmap and Continuous Improvement

From a product release perspective, Coupa delivers three major releases per year that span the whole application suite as well as the underlying common platform. At Coupa, continuous improvement and product vision are defined by three key inputs: Customers, Market, and Innovation. Rapid product innovation is a crucial element of Coupa’s growth and analyst recognition from Gartner, IDC, Forrester, and Spend Matters. On an annual basis, Coupa creates over 100 features that are driven through a balanced mix of market understanding, customer input, and pure innovation. Coupa has an incredibly strong history of working with customers through the Coupa Community, Coupa Customer Advisory Boards, Coupa Executive Advisory Board, and Coupa customer on-site visits

to discuss and refine the direction the product should take in future releases. Coupa will continue to use this customer collaboration to evolve its roadmap.

As Coupa looks at the business spend management space today, we find ourselves in an industry that often leads with "roadmap" in order to conceal product deficiencies or lack of success in their customer base. Coupa is very proud to take a completely different approach, through an agile development model and a strong collaborative innovation spirit with our customers. Coupa is the disrupter in this industry and has a history of rapid innovation unmatched in this market.

Coupa maintains a multi-year product roadmap that follows inputs from customers, market demands, and innovation opportunities. Specific areas for the next phases of enhancements include going deeper into every product application. Coupa has product development teams that work in parallel on every product line so that development happens continually across the suite. The Coupa Community will be pursuing these key themes to further enhance the platform: Approvals and Process Automation, Projects, and Task Management, Building on Coupa – Forms, Custom Objects, Apps, and the Community Exchange, Ease of Administration, Support for Large Buyer Teams, and more.

4. Innovations and Value-Added Features/Services

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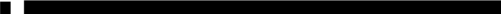
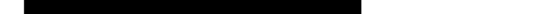
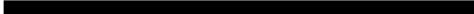
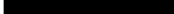
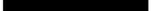
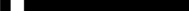
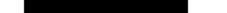
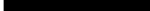
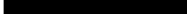
4. Innovations and Value-Added Features/Services

In addition to the stated requirements, the State seeks creative innovations, value-added features and value-added services not contemplated in the RFP.

Response requirement: OPTIONAL

- RTM: N/A
- **Inline Narrative:** If responding to this section, Bidders must provide a detailed description of any additional proposed innovations and value-added features/services as well as the benefits and outcomes Participating Entities and Suppliers would realize. Bidders must be prepared to demonstrate these benefits and outcomes. Bidders must indicate if any of the innovations or value-added services are at an additional cost and identify those in the cost workbook (reference "Innov, Value-Adds, Addl Svc" Tab).

We understand that the NASPO ValuePoint Cooperative Purchasing program is more than a system implementation. It is a transformation of your business and daily operations. Based on our understanding of your transformation journey and our experience guiding other organizations through similar journeys, we have highlighted optional services in the Figure 2 below which we believe would complement the solution. The cost of each of these optional services varies significantly dependent on scope, level of detail, and timing. We provided our preliminary pricing in the File 4 – Tab 6 Innovation, Value-Added and Additional Services and would welcome the opportunity to speak with you further about these services.

Optional Service	The Opportunity	The Benefit
 	     	    
 	   	     

Optional Service	The Opportunity	The Benefit

Figure 2. Deloitte's Proposed Innovation and Value-Added Features/Services.

5. Customizations/Extensions

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5. Customizations/Extensions

Proposed electronic procurement solutions are expected to be out of the box, configurable solutions. However, it is understood that for any project initiated by a Participating Entity some of the expected innovations and functional requirements may necessitate customizations/extensions to an existing solution. Any such customizations/extensions provided must become part of the Bidder's base electronic procurement product(s), upgraded in all future versions, available to all other Participating Entities and adhere to the following:

- Bidders must advise the Participating Entity of any out of the box or configured functionality that could be used in lieu of customizations/extensions to meet requirements and identify any necessary changes to requirements, processes, policies and, if applicable, revised Participating Entity legal code.
- Customizations/extensions must not introduce a performance issue, bottleneck or processing delay in the implemented electronic procurement solution.
- Customizations/extensions must not invalidate, negate or minimize any warranty or maintenance requirement as agreed to between a Participating Entity and their current third-party providers that support the current Participating Entity systems.
- Customizations/extensions must not be constructed in such a manner as to confound, add complexity to, or introduce technical burdens that would impact the maintenance, upgrade or new releases of the electronic procurement Solution.
- Bidders must advise the Participating Entity of any organizational change management (OCM) impacts that will result from proposed customizations/extensions.
- While the State expects customizations/extensions to be completed during the project implementation period, release of any customizations/extensions that extend beyond the implementation period must be identified on the Bidder's product roadmap submitted with the proposal.

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a brief description of how the proposed solution addresses the bullets above in regard to customizations/extensions that may be created in the execution of a project for a Participating Entity.

Coupa functionality is delivered either out-of-the-box or using standard configuration that is delivered with the solution. Coupa has been developed as a cloud solution where code-customizations are not required or allowed. Customer instances are configured independently through a user interface and externalized configuration files. This allows Coupa to enhance the system and deploy it globally to customers without typical custom code regression testing and customer proprietary added code.

Thanks to its UI-driven based configuration that permit over 10M permutations and configurations options, the Coupa platform is highly flexible and extensible. Coupa is the only truly business owned application. Source code does not need to be changed, and no programming experience is required for clients to configure and maintain the Coupa application. Outside of integration, a business administrator can make ALL configurations and customizations in the system. Coupa configurations can take a matter of minutes to create by a business user. Custom fields and webforms are done via drag and drop, and approval rules are 100 percent user interface configurable. All custom fields are reportable, can drive approval rules, and automatically available as part of our API for integration. On top of that, Coupa Process Builder lets you automate an action based on your custom business logic and can be configured in a few clicks.

Since customizations/extensions are not allowed in Coupa, there is no introduction of performance issues, bottlenecks or processing delays, there is also no negative effect on the warranty or maintenance requirement that are delivered with the Master Subscription Agreement. Furthermore, there is no introduction of technical burdens that would impact the maintenance, upgrade, or new releases. All Coupa instances allow for an easy upgrade between releases. Upgrades are included in the subscription model. This is a paradigm shift away from



traditional code modification models, which create upgrade and support issues. Coupa's cloud model offers a low total cost of ownership model in support and increase time to market on new feature requests. This reduces the amount of code that must be supported across the customer base. All in all, we will maximize the use of configuration in lieu of customization/extension to meet requirements and identify necessary changes to requirements, processes, policies and, if applicable, revised Participating Entity legal code.

Since customizations/extensions are not allowed in Coupa, organizational change management (OCM) is not utilized in the traditional sense. Changes to the solution can be made at any time by the customer administration team directly from the Coupa application without the need of a cumbersome change management program.

Since customizations/extensions are not allowed in Coupa, no changes to source code will be made during or after implementation to the customer instance. Standard configuration will be set up during implementation by the Coupa and Deloitte project team. There are no Coupa or third-party services needed to configure our system after implementation. During implementation, configuration and training will be conducted so you are not dependent on us as a vendor, or third-party services to administer your system. This allows your Spend Management experts to continuously look at ways of improving processes and incorporate user feedback, without the concern of IT resources, cost, and timelines.

6. Alternative Funding Models

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6. Alternative Funding Models

Although proposals will be evaluated based on offered price discounts, Bidders are encouraged to recommend alternative funding models that could be available to Participating Entities when they execute an agreement from a Contract resulting from this RFP. Recommended funding models must be documented in detail and be independent of all pricing proposed in the cost workbook. These funding models should reflect any ongoing funding and investment requirements necessary for all project implementation and other services costs. The recommended alternative funding models must:

- Be described in detail to fully;
- Explain how each model would work;
- Identify the benefits that Participating Entities and their suppliers would realize; and
- Identify any successes experienced by other clients implementing the model. Bidders must be prepared to demonstrate these benefits and successes.

Response requirement: OPTIONAL

- RTM: N/A
- Inline Narrative: If responding to this section, Bidders must provide a detailed description as outline above for each recommended funding model.

Deloitte offers the Lead State and Participating Entities to consider the three different funding models summarized in the Figure 3 below as a part of the deployment initiative to deliver the cash needed for this critical effort.

	1. Supplier Funding	2. Value Based Funding	3. Working Capital Funding (WCF)

[illegible]

Value Based Funding

This approach will allow the Lead State and Participating Entities to realize significant synergies as manifested in two key areas:

1. [REDACTED]
[REDACTED]
[REDACTED]

2. [REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

3. [REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

Approach

The first step in executing the strategic sourcing process is to conduct a Spend Analysis to identify the savings potential. We conduct this Spend Analysis using the four-step process outlined in the following Figure 4.

Step	Key Activities	Key Deliverables	Synergies/Accelerators
1. Market Research 2. Business Plan Development 3. Fundraising	- Identify target market segments - Conduct competitor analysis - Develop business plan - Identify potential investors - Secure initial funding	- Market research report - Business plan - Investor pitch deck - Seed funding	- Industry connections - Government grants - Partnerships with established companies
4. Product Development 5. Marketing Strategy 6. Sales Strategy	- Develop product prototype - Design marketing strategy - Develop sales strategy - Build sales team	- Product prototype - Marketing strategy - Sales strategy - Sales team	- Product development resources - Marketing budget - Sales budget - Sales team training
7. Launch 8. Growth 9. Scaling	- Launch product - Monitor growth - Scale operations - Expand market reach	- Product launch - Growth metrics - Operational scaling - Market expansion	- Launch resources - Growth resources - Scaling resources - Market expansion resources

Figure 4. Deloitte's Spend Analysis Approach and Accelerators.

[illegible]

Figure 5. Notional savings estimates resulting from Spend Analysis.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Realize Savings Post Spend Analysis

While the Spend Analysis identifies compelling savings potential, it is imperative and highly recommended to execute subsequent strategic sourcing activities to realize the savings, and to demonstrate and accelerate the pay-back period as outlined in Figure 7. The strategic sourcing services will include the following key activities:

1. Assess demands for procurement of goods and services across the Lead State and Participating Entities.
2. Analyze market's capability and capacity to provide those goods and services.
3. Establish sourcing strategies and gain alignment with the Lead State and Participating Entities' stakeholders.
4. Executing the strategy to achieve savings and create new enterprise wide contracts.
5. Operationalize sourcing contracts using the Coupa eProcurement software capabilities to drive contract compliance and lock in savings.

Deloitte is willing to define and discuss various pricing and staffing options to help the Lead State and Participating Entities move forward with its strategic sourcing journey, and use the savings attained to continue to fund future technology investments. Please refer to the pricing information contained in the cost workbook (reference "Innov, Value-Adds, Addl Svc" Tab) for further detail.

7. Contract Transition and Flexibility

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7. Contract Transition and Flexibility

Participating Entities are seeking flexibility in the contracting process and the ability to transition their current contracts to this newly established portfolio

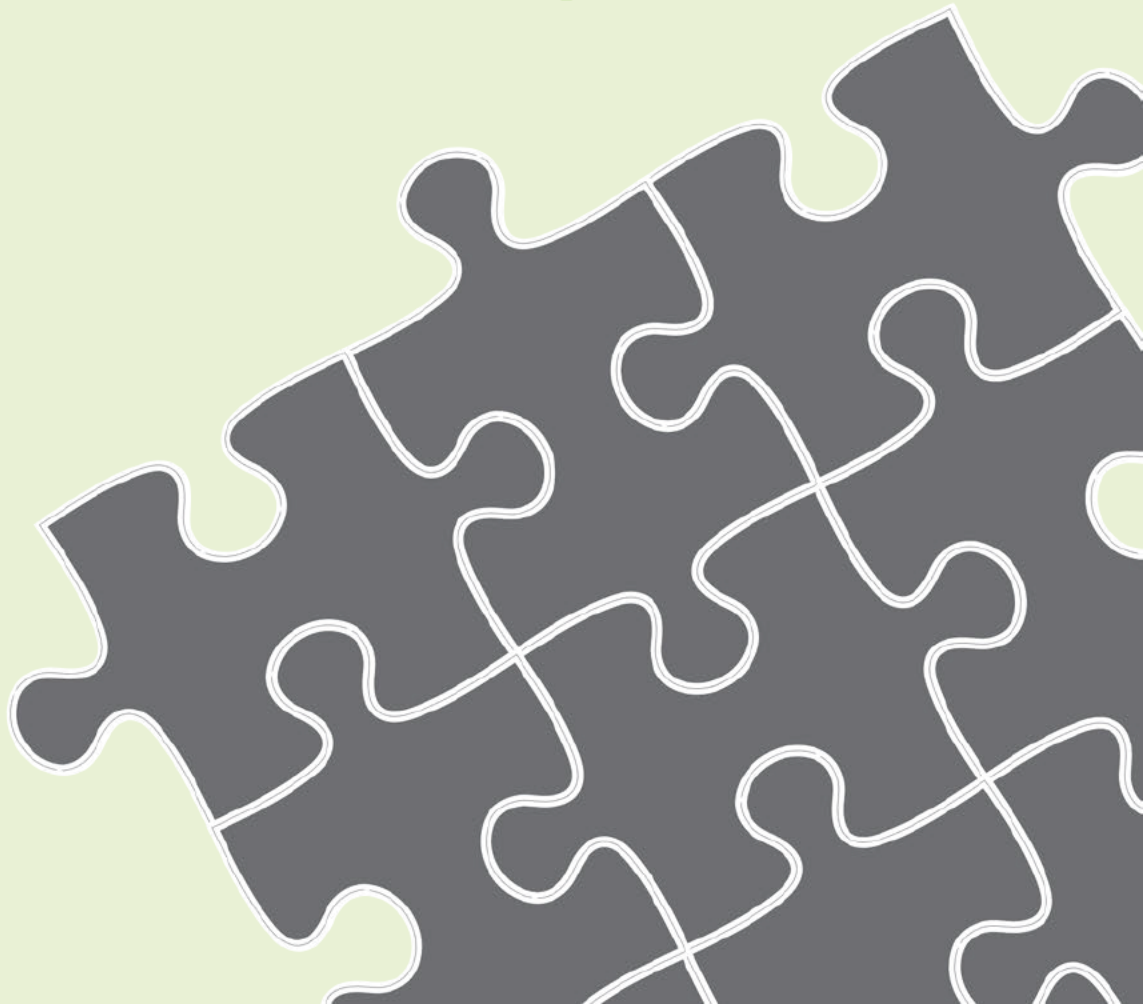
Response requirement:

- Inline Narrative: Please describe your ability to transition from a state's current contract to a new contract or amendment under the terms of a newly awarded Master Agreement and Participating Addendum. For the purpose of this response, assume that the state already has a separately solicited and awarded agreement in place with your firm – and now seeks to move that agreement to fall under the terms of the newly awarded Master Agreement (and Participating Addendum).

Deloitte agrees that we have the ability to transition existing contracts to the NASPO Master Agreement and Participating Addendum, so long as both the scope and labor categories of the existing contracts and NASPO Master Agreement are consistent. If the scope or labor categories of the existing contracts are not contained in the NASPO Master Agreement, further negotiations may be required to facilitate these transitions. We look forward to discussing the terms of such Master Agreement and Participating Addendum, should we be selected.



B. Funtional Requirements



B. Functional Requirements

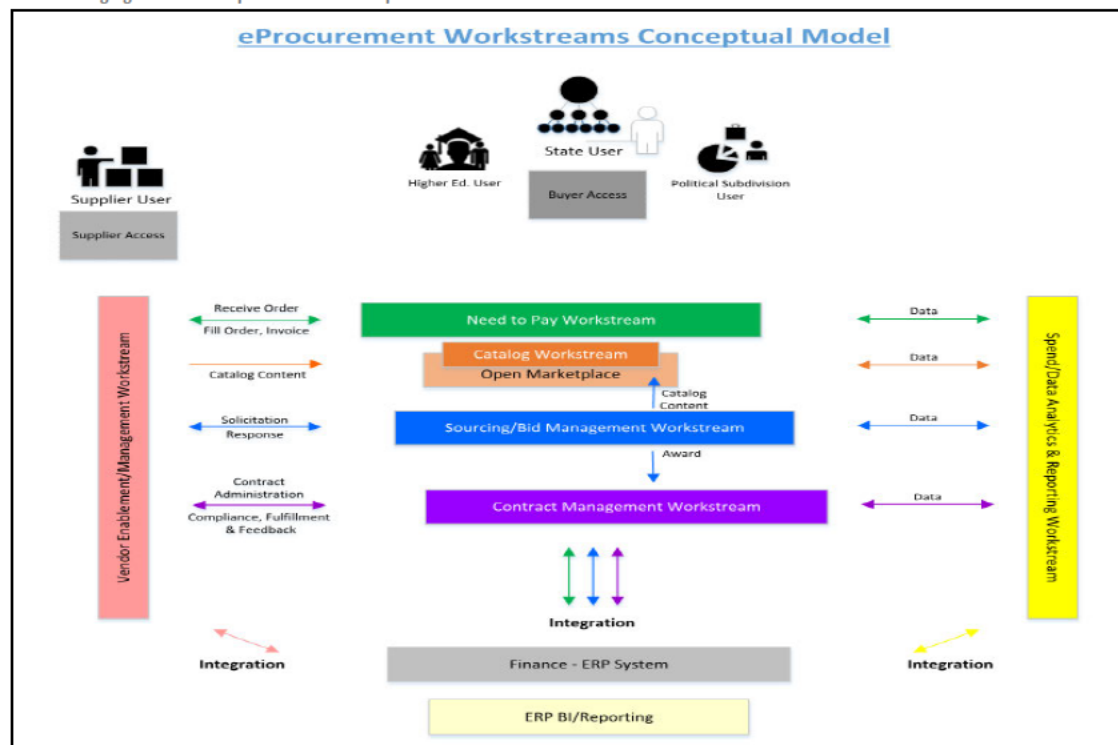
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B. Functional Requirements

The following functional requirements must be addressed by Bidders and are organized by the electronic procurement workstreams identified below. Each workstream has corresponding detailed requirements identified in the Requirements Traceability Matrix (RTM) document.

- Bidders may submit proposals that address one or more workstream however Bidders must respond as directed in each workstream section and provide detailed responses to each individual requirement in the corresponding section of the RTM.
- Proposed solutions may rely on third party software components or other partnerships to provide a complete solution. Bidders are encouraged to look for partnerships that will bring an innovative, integrated, and comprehensive Solution to Participating Entities.

The following figure is a conceptual model of the procurement workstreams.



1. General Functionality

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1. General Functionality

- The General Functionality section includes requirements that apply to either the entire electronic procurement solution or multiple components of the solution.
- The electronic procurement solution must be cloud-based with a Software as a Service (SaaS) delivery model.

Response requirement:

- RTM: Tab 2, GEN-1 through GEN-40
- Inline Narrative: Bidders must provide a detailed narrative response that describes the cloud-based solution/component that will solve the key challenges and meet the objectives and requirements of the general functionality requirements.

Coupa's Cloud Business Spend Management (Cloud BSM) solution is delivered using a hosted, Software-as-a-Service model (SaaS). Leveraging the benefits of the Coupa Cloud, customers can realize extensive business value with much less in the way of initial implementation, integration, or infrastructure costs than what has been common with traditional enterprise IT projects. The advantages of the Coupa Cloud derive principally from the true cloud model of implementation and administration through configuration, industry-leading technical architecture, and world class deployment infrastructure.

The Coupa Cloud leverages the best of the Amazon Web Services (AWS). Through AWS customers receive top-tier Cloud Computing. With Amazon, Coupa can automatically scale the service during peak load periods. This provides the ability to continuously add users and customers without downtime or lead-time to procure new capacity – it's automated in the Coupa Cloud.

Coupa's Business Spend Management platform is designed to give you significant advantages and a complete ownership of procurement transactions. With Coupa's user friendly interface you will be able to facilitate 100% user adoption across your organization, partners, and suppliers. You will also have unparalleled visibility into every transaction's lifecycle so you can start realizing the benefits of your investment within a few weeks.

Coupa applications share the same unified architecture and are accessed through the same unified interface. The Coupa platform consists of a number of applications that were designed to work together, sharing the same information. Our unified information architecture is also the bedrock on which good usability rests. Having the right conceptual, logical, and physical data model not only helps to build a robust repository of information, it also has the positive influence on the information architecture manifested in the user interface. No matter, which "module" or part of the application you are in as a user, you enjoy similar look and feel and the "workflows" work in a familiar fashion. This includes a single unified stream across Sourcing, Contract Repository, Contract Drafting, Catalogs/Requisitions, Non-PO Invoicing and Reporting, Analytics and Actionable Insights.

2. Supplier Portal

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2. Supplier Portal

The Supplier Portal functionality must provide a single point of entry 'front door' that includes all supplier facing functions for the electronic procurement solution with the ability to also incorporate access to other applications or services such as certifications, invoicing and online interactions with the Participating Entity. The Supplier Portal functionality must deliver valuable content upon logging in and be personalized to the supplier and the supplier user logged into the system.

Response requirement:

- RTM: Tab 3, SPR-1 through SPR-23
- Inline Narrative: Bidders must provide a detailed narrative response that describes overall Solution component that will meet the objectives and requirements of the Supplier Portal.

The Coupa supplier portal acts as the single point of entry for supplier facing functions. The Coupa Supplier Network brings the promise of efficient business-to-business communication and commerce to everyone. Business buyers of all sizes can connect and do business with business suppliers of all sizes. Customers can select specific suppliers to whom invitations to join the Coupa Supplier Network can be emailed. Through the Coupa Supplier Network, suppliers can:

- Manage organization information (e.g. billing, contact information, certifications)
- Configure PO transmission preferences
- Receive POs



- Acknowledge Order Receipts
- Create an online catalog
- View purchase orders
- Submit electronic invoices for payment
- Manage punch-out capabilities
- Create electronic invoices

By participating in the Coupa Supplier Network, suppliers gain access to a low-cost, high-volume order channel. They increase their order-taking efficiency, reduce mistakes and delays fulfilling orders, and maintain a better presence with their key customers. Plus, they open themselves up to potential new customers and increased sales. In addition, purchasing departments can securely connect their suppliers into their purchasing system to streamline and automate the ordering and invoicing process.

3. Supplier Enablement/Management

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3. Supplier Enablement/Management – Vendor/Deloitte

The Supplier Enablement/Management component, in conjunction with the Supplier Portal, must support all procurement activities and provide suppliers the ability to establish and maintain an account defining who they are and what they sell along with other key data elements required by the Participating Entity to procure from and pay the supplier. Suppliers will use this account to access all relevant electronic procurement and financial functionalities such as solicitations, solicitation response, order receipts, contract awards, load sales reports, and submit invoices.

This functionality should also provide capabilities to establish and maintain pre-qualified suppliers lists for bidding on specific categories of goods/services.

Integration may be required with the Participating Entity's finance system to establish and maintain Supplier payee records needed for accounts payable (A/P) processing.

Response requirement:

- RTM: Tab 3, VDR-1 through VDR-43
- Inline Narrative: Bidders must provide a detailed narrative response that describes overall Solution components that will meet the objectives and requirements of Supplier Enablement/Management.

Supplier Enablement

Suppliers can be enabled to quickly adopt multiple components of the Coupa solution. The transition to Coupa should be as smooth for them as it is for you. If you are already working with them electronically, we'll use the same method and format that you're already using. We offer many options to your suppliers including cXML, API, and the Portal. Infrequent or change-averse suppliers may choose to use our patent-pending Supplier Actionable Notifications or to simply send email to your Coupa inbox. Suppliers will appreciate alerts on new documents and status changes. We never charge supplier fees or force suppliers to join a network as some other providers do. In fact, the transition to Coupa should be so smooth for your suppliers that they might not even notice that anything has changed.

Our enablement experts will work with you to determine the best way to work with you and your suppliers. In some cases, we help organizations onboard their suppliers, contacting each of them to explain the options available to them and the benefits of transacting online. In other cases, contact a subset of your suppliers, or train your internal teams on how to engage with suppliers and explain the benefits. You have the opportunity to decide how much you want Coupa to do for you.



Common business areas that Coupa supports with suppliers

- Catalog Management
- Punch-Out Catalog Management
- Purchase Order Management
- Invoice Management

Common ways that customers can interact with suppliers through Coupa

- cXML Integration – Orders and invoices can be exchanged between buyers and suppliers using this standardized method.
- Flat File Integration – Custom integrations with suppliers can be supported through the open architecture of APIs and flat-files.
- Catalog Punchout – Use industry standard XML technology to let your users shop at a supplier's website and then return to Coupa with those items in their Coupa cart. Users can access specialized ordering tools and up-to-date pricing that you don't have to maintain.
- Portal – Supplier registration on the Coupa portal is extremely easy, taking only a few minutes. No transaction fees are charged to suppliers for any method of interaction with buyers, including the portal.
- Invoice Email Inbox – Buyers receive invoices via email from their suppliers within the Coupa system using the same invoice routing and management functionality used for direct supplier integration.
- Supplier Actionable Notifications – Notifications such as new POs include buttons that let suppliers take action directly from their email client without any registration or login required, such as submitting an invoice.

The free Coupa Supplier Portal (CSP) is available for suppliers to manage catalog content, retrieve customer orders, create advance shipping notices, and create and manage invoices. Registration is simple and fast, requiring no lengthy contract process or fees whatsoever. The Coupa Supplier Portal also allows suppliers to leverage e-invoicing functionality so customers can further automate AP invoice processing. Suppliers would access sourcing events in the Coupa Sourcing module.

To deliver Supplier Enablement services for the Lead State and Participating Entities, Deloitte will bring to bear its **Coupa Supplier & Catalog Enablement Accelerator toolkit**. Based on our implementation experiences over many clients, this toolkit prepares your implementation team with a process overview for enabling suppliers in Coupa, a methodology for selecting which suppliers to enable, factors to consider when deciding on catalog type for each supplier, and steps to follow when enabling those suppliers.

Our team will use this toolkit to guide discussion, design, and deployment of the platform, in a five-part methodology executed using Deloitte's data and business process analysis tools to arrive at data-driven solutions:

1. Define Supplier Enablement Scope
 - Which categories of spend should Coupa support?
 - Which suppliers from the client's supplier master database should be enabled?
2. Rationalize Suppliers for Enablement
 - Which suppliers should we focus for enablement efforts?



3. Define Managed Buying Channels

- What is the optimal buying channel for each spend category?

4. Sequence Suppliers for Enablement

- How should suppliers be organized for enablement?

5. Define Communications and Catalog Types

- What is the optimal communication channel and managed buying channel for each supplier?

Using the above framework, Deloitte develops a Supplier Enablement strategy in concert with your business teams and commences executing that plan in parallel with the functional and technical service deliveries. This enablement plan can include tailored training of suppliers to prepare them for business with the new platform.

Supplier Master Import and Prequalified Supplier List Development

Existing supplier master data can be imported by .CSV file or loaded into Coupa via flat-file or API integrations. From here, a prequalified list of suppliers will be maintained in Coupa for bidding and purchasing activities of specific commodities. Coupa's supplier record includes a profile view of key supplier information such as contact information, PO and e-invoicing methods, and default purchasing settings. The activity summary details all contracts, sourcing events, spend transactions, and purchasing methods. The supplier information panel covers collected information and artifacts such as supplier segmentation, insurance, diversity, tax, and banking. The Supplier Health dashboard displays supplier risk and performance information including transactional performance such as invoice overages or disputes, external feeds from data partners, risk assessments, and performance scorecards based on supplier reviews.

Coupa's Integration with ERP Finance Systems

Integration between Coupa and the Lead State and Participating Entities' financial system is supported using flat file or API to facilitate AP processes are conducted accurately. Our approach to supplier enablement begins with a scoping conversation and determination of requirements, which drive our development of a supplier enablement plan, determining catalog methods for each supplier and organizing suppliers into groups based on priority, volume, catalog and transmission methods, or other attributes determined in the requirements process. Together, our teams will perform outreach to suppliers, prepare them for transition to the Coupa environment, and work with those suppliers to bring them on-board and live within the environment. Our supplier enablement process includes catalog standardization, driving all suppliers to provide items that adhere to a unified methodology and enabling faster purchasing, more consistent analytics.

4. Buyer Portal

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4. Buyer Portal

The Buyer Portal component of the system must provide functionality that acts as a personalized single point of entry ("front door") to initiate the full life cycle of procurement activities for Participating Entity users. The Buyer Portal must deliver valuable content unique to the user once logged in.

Response requirement:

- RTM: Tab 3, BPRT-1 through BPRT-15
 - Inline Narrative: Bidders must provide a detailed narrative response that describes overall Solution components that will meet the objectives and requirements of the Buyer Portal.
-

Coupa has focused significantly on the user experience of shopping in a modern buyer portal, and Coupa's process is much like the consumer experiences used every day (e.g. Amazon, Bestbuy.com, Google, etc.). Customers report unprecedented adoption of the platform due to its ease of use and a seamless single point of entry. Valuable content such as catalogs, buying policies, alerts, configured forms, and others are available at a user's fingertips. Employees are able to find what they need through keyword searching or through browsing their catalog hierarchy. The combination of catalogs and configurable web forms creates a very familiar user experience. If ever someone needs something not found in a catalog, they can always simply create a free-form request before submitting the request into the configurable approval workflow.

Coupa takes great pride in being the market leader in ease of use and ease of administration. Customers can add their own logos, branded color, and have extreme flexibility in configuring Coupa in adding home page content (help, deployment comments, etc.), custom fields and configuring workflow(s).

Coupa makes it easy for users at every level to get things done, often without ever having to log in. Get employees, suppliers, administrators, and approvers on board quickly with little to no training. We have the highest user adoption rates in the industry, which means you can get more of you spend under management fast. When we say the best UI is no UI, we mean users should only have to interact if they're adding value to a transaction—otherwise, let Coupa do the work. With actionable email, SMS, and push notifications driving the shortest transaction cycle times, it's no wonder Coupa is becoming the gold standard for usability.

Coupa's Business Spend Management solution is designed to give you significant advantages and complete ownership of procurement transactions. With Coupa's user-friendly interface and intuitiveness, your organization would be able to facilitate 100% adoption across your buyers/users, partners, and suppliers. You'll also have unparalleled visibility into every transaction's lifecycle, so you can start realizing the benefits of your investment within a few weeks.

5. Need Identification

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5. Need Identification

The Need Identification component of the system provides functionality for a user to initiate any type of procurement action with configurable business rules to support Participating Entities custom business needs. The user interface must be user-friendly, intuitive, flexible and adaptable to support users.

Response requirement:

- RTM: Tab 3, NEED-1 through NEED-7
- Inline Narrative: Bidders must provide a detailed narrative response that describes overall Solution components that will meet the objectives and requirements of Need Identification.

Need Identification is achieved through a blend of standard catalogs and simple configuration of Dynamic Forms and custom data fields in the shopping cart. Coupa's configurable forms are available to help structure requests for goods or services that require additional information for suppliers. These forms allow users to create a set of questions about the goods or services that are being purchased. After completing and submitting the form, the user will be taken back to the shopping cart to complete the standard checkout process to create a requisition. There is no limit to the number of forms created to support a business.

These forms feature dynamic fields that enable users to create requisition lines with added conditionality. Forms allow users to create requisition lines by answering simple questions to provide a guided buying and consistent experience. It will reduce the number of forms that need to be configured and maintained by the administrators.

Form design elements, general fields, fields specific to the type of requisition line form built, and questionnaire type forms are selectable. As with other forms, requisition line forms can be shown to specific content groups if only certain users should be able to see this form. The backed fields, or fields that exist on the requisition line, including custom requisition line fields, display on the requisition line once the user submits the form and it is added to the cart. General fields will be shown separately and will be sent to the supplier unless it is marked as internal during the form configuration process.

Leveraging Coupa forms allows users to create requisition lines by answering simple questions to provide a guided buying and consistent experience. Forms are a great tool to manage requests that do not exist in a hosted catalog, supplier punchout, internal fulfillment, and service requests. These forms feature dynamic fields that enable users to create requisition lines with added conditionality. When users complete a requisition form, the request is added to the cart where it can be updated if necessary. This functionality is included with Procurement and could help to reduce the use of free-form/write requests.

Coupa is the only marketplace provider that allows customers to search their local, hosted, and punchout catalogs in one single marketplace, without ever having to leave the platform. The Lead State and Participating Entities may also consider leveraging Coupa's Open Buy functionality. Coupa Open Buy makes it easy to search punchout supplier items using Coupa search. Users can find what they're looking for without having to punch out to the supplier's website.

The homepage search is one of the main ways to find things to add to the cart in Coupa. Coupa search uses weighted full-text indexing and is sorted by relevance by default. Like many search providers, Coupa continually evaluates its search algorithm to maximize relevance, so the algorithm may be updated from release to release.

6. Request through Pay

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6. Request through Pay

The purchase Request through Pay components of the system provides functionality to automate the ordering process from the end-user purchase request through authorizing payment for the resulting order. Key components include:

- Purchase request;
- Catalog shopping to drive spend to existing contracts;
- Access to external retail marketplaces products;
- Intelligent workflow engine to apply entity and enterprise-wide business rules;
- On-line approvals;
- Electronic order dispatch;
- Receiving;
- Electronic and paper invoicing;
- Invoice matching for payment authorization;
- 3-way match for payment authorization; and
- Integration with Finance System.

The Solution must also provide the capability to support the procurement of services from pre-established services contracts (e.g. Professional Services, Contingent Labor, Healthcare Services) that may include characteristics such as deliverable-based fee services. This specialized type of purchasing would need functionality to address scope/need definition (e.g. SOW), contract supplier submission of quotes with attachments (e.g. resumes, specifications), quote evaluation/selection, order generation and receiving concepts such as recording of timesheets, deliverables acceptance, milestone completions and expenses.

Response requirement:

- RTM: Tab 3, PRD-1 through PRD-62; WRK-1 through WRK-28; PO-1 through PO-29; PC-1 through PC-21; RC-1 through RC-21; INV-1 through INV-11
 - Inline Narrative: Bidders must provide a detailed narrative response that describes overall Solution components that will meet the objectives and requirements of purchase Request through Pay.
-

Coupa Procurement allows organizations to control costs by getting their spend under management. It provides employees with a consumer-like shopping experience that allows them to easily requisition and purchase products and services using the organization's pre-negotiated prices. Business users can configure without IT help the business approval processes to enforce organization's policies every time an employee needs to make a purchase. Coupa Procurement also includes functionality like catalogs, budgets, and suppliers. Catalogs can be linked to an external retail marketplace products and make requisitioning easy by looking and working like online retail sites, with product photos, detailed descriptions, comparisons, and user reviews. These catalogs drive spend to existing contracts, bringing more of an organization's spend under clearer management.

Coupa builds on that shopping experience to streamline user purchase request processing through its approval and workflow structures. Coupa's dynamic approval chain technology allows any given purchase request to be processed through an approval workflow automatically built based on that request's attributes. The client has full access to configurations to define the logic powering these workflows to apply entity and enterprise-wide business rules. As part of a web-based cloud platform, object approvals are fully on-line and achievable either directly within the platform themselves or through actionable email.

Fully-approved purchase requests in Coupa become Coupa Purchase Orders and may be dispatched in a number of ways as best fits the Lead State and Participating Entities' needs. Coupa supports electronic dispatch of orders through cXML transfer, email, online buying, and the Coupa Supplier Portal, and suppliers may be configured to transmit all or some of their purchase requests in these methods.

Once an order is transmitted, suppliers may submit Advance Ship Notices connected to that order through the Coupa platform. Further, Coupa users are able to receive against those orders electronically in the Coupa platform. Suppliers may submit invoices directly into the Coupa environment electronically or, if they prefer paper, may submit paper invoices to Lead State and Participating Entities personnel for manual entry into the Coupa environment or transfer through email PDF. These options are available for each supplier, allowing the Lead State and Participating Entities flexibility in responding to suppliers' varying levels of readiness and capability.

Coupa supports two-way and three-way invoice matching for payment authorization. These matching methods operate alongside other tolerance configurations available to the Lead State and Participating Entities, creating a highly flexible environment which the Lead State and Participating Entities can use to automate invoice validation. These tolerances govern acceptable back-dating, additional charges, deviations from ordered amounts, and other attributes of invoices. The implementation team will work with the Lead State and Participating Entities to determine the optimal use of these configurable settings to arrive at a streamlined process that the Lead State and Participating Entities and its suppliers can use to do business.

Budgets are a key component of Coupa Procurement and allows organizations to manage their budgets in real-time, as spend happens in the organization. As requisitions, invoices, or expenses are submitted in the system, impact on budgets is automatically calculated and provides approvers the opportunity to see that impact as they make their approval decision to facilitate they are managing their spend based on budgetary goals. Customer ERPs most commonly feed budget data to Coupa as master data through regular delta files. Once in Coupa, this data can be used to drive, and block spend automatically or be configured to display budget data for informational purposes only.

Integration of budgets, invoices, purchase requests, and purchase orders are common features of Coupa implementation architectures. Each of these objects may be transacted using automated CSV or API integrations at any stage in their lifecycle. Customers received the most value from Coupa when using it as a centralized platform to manage spend, but Coupa's Open API schema allow for near-real time integration of objects to and from the ERP to automate cross-system processes.

Coupa Procurement allow organizations to work with supplier, in any way they want. The Coupa Supplier is free for suppliers to join, setup and use. Suppliers can manage their own information and catalogs and receive purchase orders (POs), acknowledge order receipt and submit invoices for payment. In addition, Coupa also provides the capability to support the procurement of services from pre-established services contracts (e.g. Professional Services, Contingent Labor, Healthcare Services) through Coupa's full-service contingent workforce management capabilities. Coupa's CCW solution also supports scope/need definition (e.g. SOW), contract supplier submission of quotes with attachments (e.g. resumes, specifications), quote evaluation/selection, order generation and receiving concepts such as recording of timesheets, deliverables acceptance, milestone completions and expenses.

The above key capabilities, combined with the list of further key capabilities below, position Coupa to deliver on a more automated, streamlined spend management approach that drives spend to existing contracts, provides access to external retail marketplace products, and drives transactions through intelligent workflow engines in a centralized platform within a cross-system integration architecture.

Key capabilities include:

- Catalogs
 - Hosted internal catalogs and punchout sites
 - Buyer and supplier content management tools
 - Tiered pricing when used in conjunction with contracts
 - Buying policies configurable to appear in context of the item requested
 - Web Forms for ordering non-catalog goods or services
 - Order Lists for simplifying long repetitive orders
 - Restricted access to catalog content for specific users and roles
 - User-driven content tagging
 - Support for minimum order quantities
 - Content Spotlight to help identify opportunities to improve searchability
- Requisitioning
 - Shopping cart based interface for requisitions
 - Two and Three-way invoice matching for payment authorization
- Services Requisitioning
 - Services procurement from existing contracts with unique characteristics (Professional Services, Healthcare Services)
 - Coupa Services Maestro (described below) for specialized type of services purchasing



- Requisition approvals and multiple involvement triggers of different approvers
 - Online forums for requester questions
 - Browsing and searching catalog capabilities
 - Support for standard ERP accounting elements and objects
 - Data segregation by business units on business objects such as Suppliers, Account Codes, Catalog Content, etc.
 - Associate attachment(s) to the requisition
 - Check available budget
 - Ability to specify payment methods
 - Search hosted catalog content
 - Ability to access punchout catalogs, create shopping carts in the third-party site
 - Automated budget checking and reporting
 - Ability to stop spend over contract maximum value
 - Define Payment Agreements on Requisitions and Purchase Orders
 - Intelligent workflow engine to apply entity and enterprise-wide business rules
- Policies
 - Ability to create policies and tag policies to appear during requisition searches
- Purchase Order Management
 - Auto-generate POs from requisitions following predefined split criteria
 - Audit trail of PO history
 - Deliver POs via email or through direct connections, such as cXML
 - Make changes to issued POs and track revisions
 - Indicate payment via P-cards
- Basic Inventory
 - Centralized receiving for receiving agents
 - Individual receiving for requisitioners
 - Record receipt of goods and services
 - Record partial shipments
 - Reorder alerts
 - Adjust and transfer items
 - Reports
 - Real-time shipping tracking

- Return to supplier
- Web Forms
 - For requisitioning non-catalog goods or services
 - Ability to assign a web form to a catalog item
- Budgets
 - Set budgets for core level within the organization
 - Configurable spend alerts can be set on the budgets
 - Real-time dashboards or “Budget Meters” for each budget item that tracks current spend against goals
 - View requisitions pending approval and approved POs against budget
- Three Bids and a Buy (light sourcing functionality)
 - Request a bid from a supplier
 - Receive a quote from a supplier
 - Transfer a quote to a requisition
- Suppliers
 - Supplier Portal
 - Receive POs, acknowledge order receipt
 - Manage catalogs, punchout capabilities and contact information
 - Supplier Actionable Notifications
 - Send PO to supplier via email
 - Allow supplier to acknowledge the PO directly from email
 - Allow supplier to add comments back to the PO directly from email
 - CXML integration

Coupa Services Maestro provides organizations with a solution for managing their complex services spend and workflows. The application is available as an add-on for Coupa Procurement. Key capabilities include:

- Requisition
 - Requisition of fixed price deliverables and rate based services via catalogs, webforms, or free-form requests
- Suppliers
 - Receive service orders
 - Submit timesheets or service sheets to report progress against deliverables
- Approvals
 - Route the service/timesheets through approvals

- Rate the quality of service provided by the supplier
- Accept/reject the service/timesheets and, upon approval, automatic creation of service goods receipts
- Tracking
 - On-time delivery and services consumption
 - Progress of the service order
 - Ability for service invoices to be matched against service time/service sheets to determine only invoices against completed and accepted services are approved for payment
 - Service/Timesheet custom fields

7. Catalog Capability

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7. Catalog Capability

The Catalog components of the system provide the functionality to maintain contract/non-contract catalogs in the shopping component of the system as described in Section C., 6. Above (Request through Pay). Catalog content can be hosted within the system or made available by 'punching out' to the supplier's shopping website. Contract catalogs must be capable of being automatically generated as part of the award process through integration with the Sourcing and the Contract Management component of the system. Maintenance of contract catalog content throughout the life of the contract/agreement must be available through integration with the Contract Management component of the system.

Other key components include utilities for suppliers to setup, manage and maintain their catalogs. User access to these utilities should be controlled through definition and assignment of roles. Workflow functionality should also be available to automate authorized Participating Entity user review and approval of catalog content before it is made available.

The Solution must provide an open marketplace environment that provides access to the aforementioned catalog components and to other non-contract, external internet retail or commercial markets of goods/services, as authorized by the Participating Entity. This environment provides the buyer with a supported "catalog of catalogs" shopping experience with a single view of all sources as described in Section C., 6. Above (Request through Pay). The objective of this experience is to give the user options to make the best possible purchasing decision that optimizes price, quality, terms/conditions, and policies. A key aspect of the open marketplace environment is that it will allow the Participating Entity to effectively manage spend.

Support and maintenance of the open marketplace that supports the Participating Entity in the overall management of the open marketplace environment inclusive of: integrations with online suppliers; regular (or real time) synchronization of products, prices for items in the catalog; available products and services; establishment of contracted Suppliers within the marketplace as well as the overall management, maintenance and operations of the technical elements that comprise this "catalog of catalogs" environment as to comply with Participating Entity operating, service level and performance requirements.

Bidders must provide continuous support of both Suppliers with contracts and non-contract Suppliers offering goods and services in the open marketplace environment. Bidders should also provide on-going support functions to continuously and proactively expand the open marketplace environment ecosystem with additional non-contract and retail/commercial market products and services.

Response requirement:

- RTM: Tab 3, CAT-1 through CAT-40
- Inline Narrative: Bidders must provide a detailed narrative response that describes overall Solution component that will meet the objectives and requirements of Catalog Capability.

Coupa has robust catalog functionality that enables customers to maximize their employee's shopping experience while enforcing on-contract purchasing.

Coupa catalog functionality allows for both hosted catalogs – in which a supplier submits their items into the Coupa environment and may be reviewed by a Lead State and Participating Entities employee before becoming available depending upon Lead State and Participating Entities requirements – and punchout catalogs, where an employee navigates to a supplier-hosted external site to procure items before returning to Coupa to submit those items in a purchase request. Both methods allow suppliers to setup, manage, and maintain their catalogs. Hosted catalogs allow the Lead State and Participating Entities greater control over this process by controlling Lead State and Participating Entities employee or contractor access to these hosted catalog workflows based on the definition and assignment of user roles. Further, catalog approval chains allow automated routing of catalogs to specific personnel or groups for review, at which time authorized users may approve or reject entire catalogs or specific line items before such items become available to the Lead State and Participating Entities' user base for procurement.

Catalogs may be created directly from Coupa sourcing events as part of the award process. After awarding a supplier, a user can see an "Act on Awarded Items" drop down menu from which multiple actions can be performed on the award including adding items/services to a catalog or to catalog with a contract. This is a native function of Coupa which requires no integration, as all Coupa modules offered in this proposal are part of a centralized Coupa solution. This award process creates item records connecting the item solicited to a Supplier record and offers that item for purchase by the Lead State and Participating Entities' Coupa users, from that supplier and at the price as determined by the award.

Catalog maintenance with respect to catalogs is also performed within the centralized Coupa environment. Maintenance of catalog content can be managed throughout the life of the contract/agreement by the Lead State and Participating Entities or directly by suppliers. Since spend data is shared across the unified BSM platform, contracts can be associated with suppliers and catalogs. Supplier catalog are collections of item records associated with that supplier and which may also be associated with a given contract with that supplier. Spend on catalog items associated with a contract is reportable under that contract through that item's lifecycle in Coupa. Adjustments to those items – such as price adjustments – display immediately on the contract and other locations featuring the item in Coupa.

These catalog processes and methods allow for users to have access to a catalog of catalogs – both hosted directly in the site and available through punchouts to external sites – to give them the information necessary to make the best purchasing decision for their needs. Similarly, this allows Suppliers to self-synchronize their items, either by submitting hosted catalog content for approval at any time or by maintaining their items in their external punchout catalog.

Key capabilities include the below, described further in our response to the Lead State and Participating Entities' requirement matrix:

- Hosted Internal catalogs and Punch-out Sites
- Buyer & Supplier Content Management Tools
- Comprehensive consumer-like searching & browsing capabilities
- Tiered Pricing when used in conjunction with Coupa contracts
- Buying Policies that are configurable to appear in context of the item requested
- Web Forms for easily ordering non-catalog goods or services
- Order Lists for simplifying long repetitive orders
- Restricted access to catalog content for specific users and roles
- User-driven content tagging

Coupa is the only marketplace provider that allows customers to search their local, hosted, and punchout catalogs in one single marketplace, without ever having to leave the platform. The Coupa solution includes access to Coupa's Open Buy suppliers, which enable punchout catalog items to display in the Lead State and Participating Entities' Coupa environment alongside hosted catalog items, streamlining purchasing within the environment even as users find value in punchout catalogs. Coupa Open Buy provides employees with a unified search experience that connects your Coupa Procurement with select suppliers' third-party hosted content and returns real-time search results, without the need to maintain traditional catalogs.

Likewise, Coupa's Advantage Suppliers constitute a base of suppliers with whom Coupa has negotiated savings and makes available as punchout suppliers to interested customers. These value drivers and the ease with which suppliers may be enabled throughout the Lead State and Participating Entities' use of the platform provide direct avenues through which the Lead State and Participating Entities and our implementation team may support the expansion of the open marketplace within the environment.

Some of the key benefits of Open Buy are:

- No need to work with different vendor sites and search engines
- Rely on search instead of trying to guess the correct punchout to use
- Easily compare similar items from different punchout suppliers
- Control access to specific users, departments, or regions, just like punchouts today

Open Buy is not an online marketplace and depends on existing pre-negotiated contracts with customer punchout suppliers. Coupa also provides on-going support functions to continuously and proactively expand the marketplace environment ecosystem to include additional supplier offerings. Coupa continues to add new suppliers to Coupa Open Buy. Coupa has added more than 100 new suppliers since December 2019.

8. Sourcing/Bid Management

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8. Sourcing/Bid Management

The Sourcing components of the system provide functionality to automate the entire solicitation process for both the buyer and the supplier. All types of solicitations can be created leveraging standard templates and libraries. Formal or informal, sealed or un-sealed, complex or simple. Other key functionalities include initiating solicitations from a requisition, public posting, supplier notification, evaluation of bids/proposals, making the award and the integration with other solution components to automate the creation of catalogs and contracts.

Response requirement:

- RTM: Tab 3, SRC-1 through SRC-151
- Inline Narrative: Bidders must provide a detailed narrative response that describes overall Solution component that will meet the objectives and requirements of Sourcing/Bid Management.

Coupa Sourcing allows business users to create, host and manage sourcing events and automate the entire solicitation process for both buyers and suppliers. It provides easy to use capabilities that let anyone in your approval chain set up new events from scratch, standard library templates, or copy all or parts of previous events. Solicitations can be created for various business needs, including formal or informal, sealed or un-sealed, complex or simple sourcing events. It allows organizations to effectively manage their RFPs and RFQs and provides complete flexibility in setting up the rules of engagement and communicating with bidders. The sourcing cockpit-like environment allows both buyers and watchers to monitor the progress of sourcing events and drive negotiations.

Permissioned buyers can send requisition lines to a sourcing event. Coupa can then add the awarded items to a new requisition, with the relevant item information carried over to the requisition. Coupa carries over all of the item information/data, including questionnaire information, from the sourcing event. The requisition will then be linked to the sourcing event for easy navigation for potential future audit purposes. Coupa Sourcing Events may be made public, exposing them to all suppliers registered to the Coupa Supplier Portal and providing a URL the Sourcing Event's owner may include in public posting. With that URL, a Supplier can navigate directly to the Sourcing Event and request to participate. Deloitte's Robot Process Automation (RPA) bot library can automate this public posting process by extracting the URL from the Sourcing Event and preparing or posting messages, depending upon the Lead State and Participating Entities' requirements.

Notifications and alerts are highly configurable elements within the Coupa platform. Notifications, alerts, and reminders are automated and incorporated within the workflow to facilitate relevant stakeholders (buyers & suppliers) are notified about event information. Status change triggers an immediate notification to suppliers/buyers. Any escalation procedures can be configured as per existing business rules for the customer.

Notifications are handled in several ways within Coupa: There are chat options within the application, email notifications that are actionable directly from the email, and notifications via the supplier collaboration portal.

For evaluations, buyers can provide comments and ratings on supplier responses. Only the customer event team can see this feedback, suppliers cannot. Buyers can rate each supplier's response to attachments, questionnaires, and items/lots section. Each section's score is weighted according to the corresponding weights that the buyer/administrator can choose in the event's setup page. Coupa can sort supplier responses by these scores.

The Coupa platform consists of a number of applications that were designed to work together, sharing the same information. Once a customer awards a supplier in a sourcing event, they can activate the supplier for purchasing, start a contract, create catalog items, and can even add the items to a requisition directly from the order response. From there, the approved requisition can automatically generate a PO, which can be flipped into an invoice that can be cleared for payment. Coupa can create a contract from the sourcing event when awarding, as well as earlier in the process. The total amount is defaulted to the contract maximum. Most attachments, savings, and the default contract name are carried over, by default. The sourcing event manager is set as the default contract owner. Coupa creates the items from the sourcing event in the catalog and adds them to the contract (if there are items). Additionally, because of this native integration between its applications, Coupa Sourcing is able to analyze data from across the suite (i.e. requisitions, purchase orders, invoicing, etc.) to identify opportunities for new sourcing events that will result in additional savings to the organization. For example, Coupa can identify if an organization has purchased 7 of the same laptops from 7 different suppliers, off-contract, and suggest this as a new opportunity for sourcing.

Key capabilities of Coupa Sourcing include:

- Creating sourcing events from scratch, template, or even the requisition record
- Linking events to projects, so RFIs, RFPs, RFQs and reverse auctions can be grouped and viewed by projects
- Requiring bidders to agree with your terms and conditions before viewing information
- Automatically calculate Base Price based on supplier responses
- Request organization, legal and pricing information in various formats such as inline or attachments
- Ability to set bid increments to avoid penny auctions, host reverse auctions or set up two envelope unsealing events
- Set time frames for events, and extending if needed
- Set up rules of engagement and communication with bidders
- Accept bids in multiple currencies
- Host Reverse Dutch and Reverse English auctions
- Create formulas to calculate the total cost for a bid to account for fees
- Identifying opportunities for sourcing events



- Score and weigh submissions to decide which supplier will win the bid
- Task management keeps event on track
- Suite synergy with other Coupa products such as requisitions, suppliers, and contracts
- Sourcing cockpit-like environment allows buyers and watchers to monitor the progress of sourcing events

9. Contract Management

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9. Contract Management

The Contract Management components of the Solution encompass all aspects of contract development, tracking, electronic signature, and administration. Contract document authoring is automated through templates and libraries to provide consistency across the Participating Entity. Workflow functionality provides oversight by automating the review and approval processes.

Key contract administration functions address management of subcontractors, identification of authorized resellers (dealers, distributors, etc.), tracking and managing Supplier sales reports, Contractor performance and compliance as well as amendments and renewals.

Response requirement:

- RTM: Tab 3, CNT-1 through CNT-88
- Inline Narrative: Bidders must provide a detailed narrative response that describes overall Solution component that will meet the objectives and requirements of Contract Management Capability.

Coupa Contract Lifecycle Management (CLM) enables customers to operationalize contracts and make them easily available for purchasing by employees across the organization. Contract compliance increases savings as employees make purchases using negotiated rates. Real-time contract enforcement and spend visibility is provided through embedded dashboards at both the contract and summary level.

Coupa enables contract administration through its native tools and modules available to the Lead State and Participating Entities. Within the CLM module, contracts may be configured to contain general and type-specific custom fields used to capture data such as subcontractors and the identities of authorized resellers (dealers, distributors, etc.) through either direct text entry into the environment or upload of descriptive attachment files up to 100MB in size. Spend under a contract is natively reported in Coupa, and available through both cross-contract dashboard views and within individual connects, with native linkages to the individual transaction lines in Coupa that comprise that spend.

Coupa CLM allows for automated and manual renewal per contract, with clear tracking and auditable history records of renewal dates and times. Additionally, CLM allows for fluid amendment of existing contracts while retaining a record of earlier contract versions. Each amendment can be routed to configurable approval chains, and field-level changes are recorded in an auditable history log. Amendments may be configured to require additional signature by both parties or to allow administrative changes to records which do not require additional signature.

Coupa has an easy-to-use administration panel for a non-programmer to perform maintenance of contract records. The CLM application can be configured to identify contracts associated with subcontractors and authorized resellers. In addition, administration functions allow for tracking of contract-related sales reports, contractor performance and spend on contract, and spend against contract compliance. Various types of contracts can be tracked in the solution such as master agreements, SOWs, MSAs, and amendments. In addition, each contract that is stored in CLM can be assigned specific start and expiration dates. Automatic alerts can be sent to designated users that specific contracts are approaching expiration. CLM can also track auto-renewal parameters, such as number of renewals, length of renewals, and opt-out notice periods.



Coupa's Projects feature, included in the core Procurement module, offers a workflow management tool the Lead State and Participating Entities can use to tie together multiple Sourcing Events, Contracts, Suppliers, and attachments that serve to support one or more joint efforts or activities. Projects also leverage Task functionality to assign specific functions to one or more users, and then track progress against that task. Coupa Projects empower contract management by providing a centralized workspace in Coupa to track those relationships across multiple contracts in the context of a larger organizational goal.

Key capabilities include:

- Contract development and Supplier collaboration: invite supplier to collaborate in the authoring and negotiation process via upload/download with MS Word
- Tracking of contract records, redlines, versions
- Automation of contract administrative tasks, serving as a central repository for all supplier contract types (i.e., NDA, MSA, SOWs, Licensing Agreements, etc.)
- Integration with electronic signature, such as DocuSign
- Workflow oversight with built-in approval chain design of contracts and negotiations
- Basic contracts template library functionality (create template and use as starting contract)
- Version control and redline views for contracts authored within Coupa
- Email notifications on contract document activity
- Ability to use fields on Contracts to pre-populate data
- Contract locking prevents users from overwriting progress

10. Vendor Performance

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10. Vendor Performance

Vendor Performance management is a business practice that is used to measure, analyze, and manage the performance of a Supplier in an effort to cut costs, alleviate risks, and drive continuous improvement. The ultimate intent is to identify potential issues/risks and their root causes so that they can be resolved/managed to all parties benefit as early as possible. The electronic procurement Vendor Performance functionality must capture Vendor performance information and data including, but not limited to, delivery dates, receipt dates, pricing accuracy, cure letters, contract milestone completion, and customer surveys. The data must be collected in a manner that allows for reporting and analysis. The solution will provide the Participating Entity with a means to assess, track, manage and report Supplier performance across all procurement activities and include capabilities to capture and address performance complaints/issues.

Response requirement:

- RTM: Tab 3, VPE-1 through VPE-25
- Inline Narrative: Bidders must provide a detailed narrative response that describes overall Solution component that will meet the objectives and requirements of Vendor Performance Capability.

Coupa delivers robust capabilities that closely align with the Lead State and Participating Entities' vendor performance requirements to measure, analyze, and manage the performance of supplier activities. Cost savings, risk reduction, and process improvement is supported using Coupa reports, dashboards, configurable forms, and the Risk and Performance Management (RPM) module. Coupa meets all of the requirements as set forth in RTM: Tab 3, VPE 1 through VPE-25.

Coupa's supplier performance dashboards track vendors that have the worst on-time delivery performance, who are the customer's top-rated and lowest-rated suppliers, as well as those vendors who have been over-invoicing. Standard and custom reports are used to track delivery dates and receipt dates.

Cure letters can be configured using Forms and simple improvement plans can be established for suppliers deemed to be underperforming. If a supplier is below a benchmark or is of high risk, a user can see prescriptions on the Supplier Health page for mitigating risks, improving your results, and/or optimizing performance when working with the supplier. Prescriptions are driven by various risk and performance metrics and they are refreshed daily. Additionally, Coupa enables customers to assign recommendation-related tasks to accountable individuals or groups to take necessary actions. You can then monitor progress against each task to facilitate progress and accountability.

Coupa CLM allows users to set contract alerts for automatic notification. Customers control the alerts received so important contract management tasks are not forgotten. Alerts related to contract milestones include a) Contract Expiration – Alert the right people with enough time to act, and b) Contracts are nearing an expiration date and POs or invoices haven't reached a specified percent of their minimum spend.

Coupa enables customers to optionally prompt employees to rate suppliers and provide feedback. Coupa uses a 5-star rating system, with comments, to allow users to provide feedback on products and suppliers.

The Coupa Forms feature can be used to configure questionnaires and gather feedback from buyers and suppliers. Users can create customized supplier review forms to gather buyer feedback on suppliers' performance in the form of star ratings and corresponding descriptions. By allowing buyers to initiate supplier performance reviews more extensively and easily and helping them gather more information during a supplier review, Coupa hopes to improve how customers perform internal supplier performance management.

Coupa has combined Coupa's Process Builder and supplier review forms to ask the right person to review a supplier at the right time at the right place. For example, providing key reviews about the ease of contracting with a supplier is requested from the user(s) within a couple of hours after signing and publishing a contract. As a result, customers can have an increased number of more accurate reviews from the right people at the right time, without having to conduct surveys with their buyers.

With Supplier Ratings, users can view a supplier record to see the overall rating and the number of ratings for that supplier under the Supplier Details section.

Finally, Coupa Risk and Performance Management (RPM) helps customers understand and manage their supply chain risk by providing supplier health scores and prescriptions on how to improve their business relationship with high-risk suppliers and mitigate risks.

Coupa RPM provides capabilities that allow organizations to onboard suppliers, keep their information up to date, and continually monitor risk and performance to support business continuity and some compliance needs.

Coupa's approach to supplier and third-party risk management is fully integrated with procure-to-pay and across all BSM processes. Managers get prescriptive recommendations of suppliers that have already been rated and on-boarded for digital transactions to accelerate onboarding. Risk and performance monitoring are managed within the same platform as purchasing and invoice management, driving digital adoption by suppliers. Coupa helps managers find diverse suppliers at the right price to drive impact. Once the right suppliers are targeted and brought on, Coupa continually manages supplier risk with health scores,

A supplier manager can create "opportunity triggers" which automatically generate alerts about changes to supplier risk and performance including specific measures like a supplier's financial health, judicial filings or negative news sentiment as well as risk scores imported from third-party data sources. As supplier performance measures change, alerts can also be generated for individual scorecard criteria such as quality, price, behavior or



even invoicing overages and rejections. These alerts guide the user directly to the risk and performance scorecards and Power Recommendations such as reviewing rejected invoices or placing a supplier on hold pending a review.

Key capabilities of Coupa RPM include:

- Supplier Management
 - Invite suppliers to be onboarded using a form and allowing a buyer to approve or reject the completed form
 - Maintain supplier information and records, including Diversity status
 - Use “right-time participation” to request missing information in P2P transactions
 - Check for duplicate suppliers--comparing new supplier information to existing suppliers
 - Export supplier information to vendor master systems
 - Browse for new suppliers, leveraging community-powered ratings and diversity flags
- Supplier Risk and Performance Monitoring
 - Provide visibility into supplier risk and performance based on 1) Coupa-provided risk on eligible suppliers, 2) performance data captured internally 3) Coupa’s AI-powered community-based aggregated transactional data, and 4) customer subscriptions to third-party data providers
 - Capture performance information across system KPIs and user feedback at the time of P2P transactions, including delivery dates, receipt dates, pricing accuracy, cure letters, contract milestone completion, and customer surveys, price rating, delivery rating, quality rating, ease of contracting collaboration, disputed invoices (%), and more
 - Provide visibility overlaying supplier health (comprised of risk and performance) and spend data together, along with recommendations on how to mitigate supplier risk
 - Give users across buying, sourcing, and other areas across the Coupa platform visibility into supplier health scores for better decision-making
 - Give users visibility into in-flight transactions based on health scores so they can take action, even freezing transactions as needed
- Benchmarking and Insights
 - Gain visibility into operational KPIs and benchmarks from across the community of participating Coupa customers
 - See prescriptive suggestions for improvement



11. Purchasing/Data Analytics

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11. Purchasing/Data Analytics

Purchasing/Data Analytic components of the system provide robust data analytics and reporting to allow the Participating Entity to strategically assess procurement transactions and records for more effective sourcing and contracting, to include spend. These functionalities also provide the means to assess across operation dimensions such as supplier classification, organizational elements and buying trends. Reporting is presented in the form of interactive charts and dashboards with the ability to 'drill down' to the transactional data for comprehensive analysis. Transparency is also a key feature to this component as reports, charts and dashboards can be designed for public access.

Response requirement:

- RTM: Tab 3, PDA-1 through PDA-37
- Inline Narrative: Bidders must provide a detailed narrative response that describes overall Solution component that will meet the objectives and requirements of Purchasing/Data Analytics Capability.

Lead State and Participating Entities need actionable insights from transactions and data to strategically assess procurement transactions and records for more effective sourcing and contracting. Reporting and analytics must also be delivered to drive forward the capabilities to make data-driven decisions. Deloitte recommends developing a reporting strategy where we conduct a review of potential report/dashboard provided by Coupa to develop a comprehensive approach to allow the Lead State and Participating Entities to strategically assess procurement transactions and records for more effective sourcing and contracting. We will use the Coupa application's delivered reporting capabilities to reduce your implementation cost and ongoing maintenance effort. This assessment will allow us to develop a much more detailed estimate of effort for both the Deloitte and the Lead State and Participating Entities, as we assume shared ownership for report development to prepare your team for post-production operations.

[Redacted]

[Redacted]

Once a reporting strategy is developed, we will leverage Coupa's existing reporting capability to put the strategy into action. Coupa Reports, which is included as a part of its eProcurement platform, provides pre-built dashboards and reports throughout the suite to provide real-time information for what matters most in those areas. Data in each report is for the single application represented. Transparency is also a key feature to this component as reports, charts and dashboards can be designed for public access to everyone within an organization or limited access to the original report creator or a group of restricted users.



Key capabilities include:

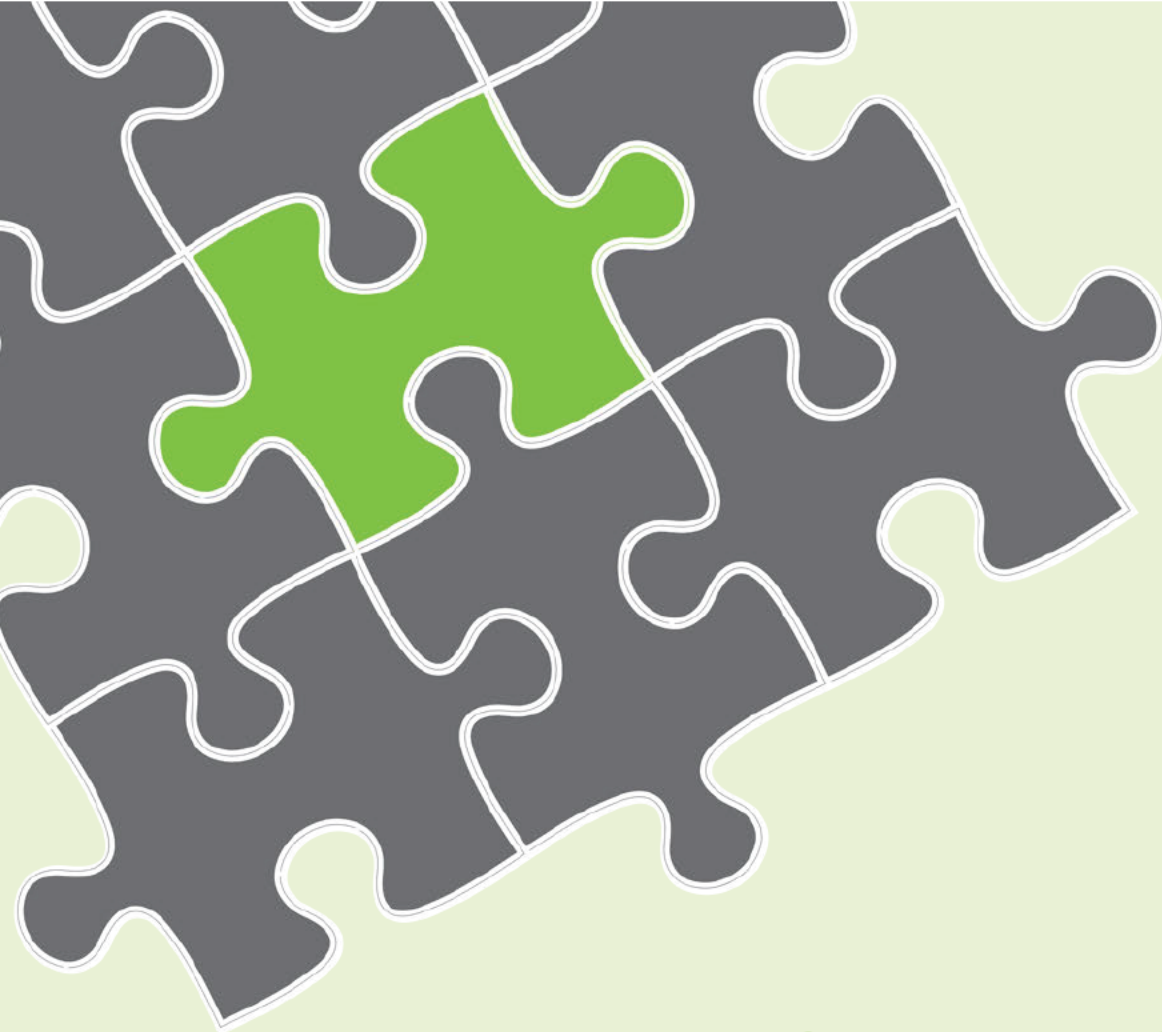
- Create new reports, share them with others, or schedule them to be emailed
- Summary Dashboards for tracking spend as it happens and monitoring against budget
- Spend Performance Metrics to monitor KPIs like spend by commodity, spend by top suppliers, and spend of different types (e.g., Punchout vs. Catalogs vs. Free Form)
- Real-time actionable reports to monitor activities across various areas and generate regulatory compliance reports
- Metrics reporting to assess across operation dimensions such as supplier classification, organizational elements and buying trends.
- Benchmarking to view KPIs of your organization against other organizations using Coupa, viewing comparisons and identifying areas of improvement
- Data available with reports is dependent on modules licensed

Coupa Analytics provides drag-and-drop analytics dashboards that allow users to setup and configure their own analytics dashboard and reports. Reporting is presented in the form of interactive charts and dashboards with the ability to 'drill down' to the transactional data for comprehensive analysis. For executives, Coupa Analytics also includes executive dashboards for monitoring and measuring spend key performance indicators.

Key capabilities include:

- Drag and drop customizable dashboards and reports
- Pre-defined KPIs and reports for quick reporting and data analysis, such as spend by commodity, suppliers, account segment, location, business unit, etc.
- Pre-defined KPIs for process approval and velocity metrics for requisitions, orders, invoices, and expense reports
- Annual, quarterly, and monthly trends and time series

Frequent automated updates of data into Coupa Analytics



C. Technical Requirements





C. Technical Requirements

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C. Technical Requirements

Bidders proposing a Solution in response to the Functional requirements must respond to all Technical Requirements sections in this RFP.

1. Availability

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1. Availability

The solution should be architected to ensure 100% availability between peak use hours of any of the associated Participating Entity that has an agreement resulting from this RFP (i.e., 7 am – 6 pm local time, Monday –Friday). Availability is defined as the ability to process transactions according to service level agreement (SLA) performance levels specified in the Participating Entity agreement.

Sufficient redundancy must be maintained so that the system appears to be available 24-hours-a-day 7-days-a week. Redundant servers, mirrored servers or fail-over devices should be architected so failure of a single component does not affect overall system availability. Multiple points of presence to multiple internet service provider's (ISP's) should also be in place.

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Availability objectives and requirements.

The Coupa solution maintains near 100% availability, with an average monthly uptime averaging 99.99%. Coupa's uptime SLA includes 99.8% system availability. The system's scalability helps facilitate Coupa meets its SLA on availability. Coupa uses automated scale-based load, which means that its system can expand a contract based on the number of users or calculations occurring. Coupa runs billions of transactions and billions of dollars in spend through its system, in part because of the Amazon Web Services features and also because of the design of the product.

In order to provide some transparency into our service availability, we publish our platform monthly uptime. Uptime is calculated pursuant to our service level agreement and excludes items such as planned or emergency maintenance and unavailability caused by circumstances beyond our reasonable control, including unavailability due to customer or its users' acts or omissions, internet service provider failures or delays, failure or malfunction of equipment or systems not belonging to or controlled by Coupa or force majeure events.

In 2020 we've achieved the percentage up-time of 99.99. so that the system appears to be available 24-hours-a-day 7-days-a week to users with the exception of scheduled downtime periods, from anywhere in the world.

Customer data is stored on redundant database servers with live failover, in addition to the physical redundancy (network and power) that Azure provides. Customer data is stored on RAID class hardware and replicated in real-time to a secondary environment in a different Availability Zone (AZ). Coupa runs in an active/active configuration across multiple AZs. There is fault tolerance in Coupa's architecture where the failover for all the systems include database, web application, application layer and reporting servers. All the integrations also have fault tolerance with primary and backup built in. Coupa's hosting partner, AWS, has multiple internet service provider's (ISP's) in place to facilitate continuous delivery of the solution in the face of disruption.

Coupa provides customers with the availability to consistently access their data around the world. The Coupa Cloud has the ability to run the Service across 12 different physical locations across the globe, providing Coupa customers with assurance that the service will always be available, even in the case of severe disasters. Coupa's backup strategy allows critical operations to continue in the event of a disaster. Additionally, Coupa employs a disaster recovery and business continuity plan that includes procedures for dealing with a potential disaster, identifies and defines key employees and their roles, and details instructions for restoring business functions. These instructions include the latest system descriptions and how they are tested. The application and data is

replicated across multiple AZs and Regions so there is no single point of failure within a data center, and so that no one AWS data center is itself a single point of failure. All transactional customer data is stored in a fully managed SQL-compliant database and replicates all production data across two different storage arrays within the same data center or AZ.

To read more concerning our uptime and metrics please review the following link:
<https://success.coupa.com/Trust/System Up Time and Metrics>

2. Accessibility Requirements

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2. Accessibility Requirements

The Solution should provide capabilities to support users with disabilities that are in compliance with Section 508 of the Federal Rehabilitation Act and W3C Web Accessibility Initiative standards/guidelines. Proposals must describe existing accessibility capabilities, compliance with these standards/guidelines and identify any existing associated certifications. This discussion must address both publicly available and login-secured components of the Solution.

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Accessibility Requirements objectives and requirement.

Coupa is committed to accessibility for end-users of all abilities in our Coupa web homepage, web-based and mobile applications. All components of Coupa are login-secured and made publicly available to authorized users. Compliance with accessibility requirements is a strategic goal across the product development organization. Coupa's accessibility focus is currently directed toward end-user facing UI throughout the Coupa Mobile client, and Coupa Web Home Page, User Settings, and main usage workflows in the Expenses, Cart, Requisitions and Purchase Orders areas of the product. Coupa is also working towards section 508 accessibility requirements with support from our government customers.

Although accessibility efforts typically aim to serve users who may have an impairment of vision, auditory sense, motor function, or cognitive ability, Coupa believes product enhancements supporting these needs can provide a more usable product for our users.

Coupa is continuously applying accessibility requirements in our processes, such as UX and functional design, as well as in our automated testing, internal accessibility reviews, and external third-party reviews of our accessibility towards relevant standards and best practices, for continuous improvement over time.

Coupa has adopted the standard Web Content Accessibility Guidelines (WCAG) version 2.0 Level AA, as part of the Web Accessibility Initiative (WAI) developed by the Worldwide Web Consortium (W3C). This is also known as ISO/IEC 40500:2012. This defines the international best practices for accessibility as outlined in virtually all International accessibility standards, as well as Section 508 of the Rehabilitation Act in the United States.

The WCAG 2.0 standard classifies accessibility features into categories of Perceivable (surfacing UI to available senses), Operable (can take actions with available inputs), Understandable (the Participating Entity descriptions, predictable structure), and Robust (compatible with Accessibility technology). Coupa designs, implements, and tests with this mission in mind, focusing on delivering our best implementation of the WCAG 2.0 Level AA standard for the success of our end-users and customers who depend on these features.

Currently, we comply with all WCAG 2.0 Level A and AA criteria up to Fully Supports or Partially Supports conformance levels across our core P2P and Expenses offerings. Coupa's accessibility focus is currently directed toward the login-secured components of the solution, specifically the end-user facing UI throughout the Coupa Mobile client, and Coupa Web Home Page, User Settings, and main usage workflows in the Expenses, Cart, Requisitions and Purchase Orders areas of the product.



We're making steady progress in each major release toward Fully Supports across additional criteria over time. When this is achieved in each product area, improvements will continue towards conformance with WCAG version 2.1 in these areas as well.

3. Audit Trail and History

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3. Audit Trail and History

The Solution must track user and Supplier activity throughout the Solution. The Solution must also track transaction activity to provide a history that includes, but is not limited to, creation, changes, approvals or rejections of the transaction. The data captured should include at a minimum date, time, user, action taken, status changes, content changes and approval or rejection history. The tracked information should be accessible to users by reports, a history page or other option that is accessible without support from an Administrator. All tracked data must be retained in a manner that is consistent with other data retention practices within the Solution.

Response requirement:

- RTM: Tab 4, TECH-1 through TECH-5
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Audit Trail and History objectives and requirements.

All transactions and important master data contain an audit trail with date/time stamps throughout the application to track all user and supplier actions. This includes the creation, changes, approvals, or rejections of any given transaction. Coupa operations can also provide audit reports needed by our customers, as we have access to all actions ever taken in the system.

Coupa makes audits easier by capturing a digital record of all approvals to identify who approved what purchases, when, and why. Coupa provides several types of reports which allow the organization to audit the approval chain setups and approval history. Coupa allows the user to manipulate reports and create end-user specific views as necessary to provide pertinent information, including dates and approver names. Activity reports and histories can be viewed by permissioned users without support from an administrator. All tracked data in the application is retained for the life of the contract with the Lead State and Participating Entities.

Coupa audit trails are recorded in multiple locations across the environment. All transactions and important master data objects contain expandable and collapsible history records that list the author of the action, the date/time of the action, and the particular action performed. The application audit trail and system logs include the date, time, user, action taken, status changes, content changes and approval or rejection history. For most scenarios, this includes the previous value of a field (if any) as well as the value after the recorded action. Transactional objects such as requisitions, purchase orders, and invoices, also have their approvals and change histories recorded in searchable history dashboards. Dashboard reports can be generated and exported from this dashboard to power automated and manual reporting. This dashboard operates under the same schema as other Coupa dashboards in the environment, creating a familiar UI with which a user can access this data. Both record changes and approvals/rejections are reported using these means.



4. Browsers Supported

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4. Browsers Supported

The Solution must only require internet browser software for user access to the Solution. No site or application component will utilize features available only when using a specific brand of Web browser. At a minimum but not limited to, the solution should support current versions of the Microsoft browser, Chrome, Firefox, and Safari and should ensure continuous support of future industry leading browsers, new versions, and older versions. Additionally:

- Any browser that is ranked as more than 10% of the Web traffic must be supported.
- Popularity of browsers used to access the Solution must be tracked to identify browser and platform trends.
- The Solution must be tested for multiple browsers, operating systems, and versions (including backward compatibility) based on intended audience. This includes upgrades, new releases, enhancements and fixes.
- If a page will be rendered inoperable on an older browser the page must contain a notice to that effect that is viewable in non-compliant browsers.

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Browsers Supported objectives and requirements.

The Coupa service is accessed entirely through the web using web browsers that are ranked both over and under 10% of traffic market share. The following web browsers are supported:

- Microsoft Internet Explorer
- Microsoft Edge
- Google Chrome
- Mozilla Firefox
- Safari (but not tested)

Coupa generally supports the latest version of Internet Explorer, Edge, Chrome, Safari, and Firefox within six months of a browser release. IE and Firefox are the browsers the system is tested against, and this covers upgrades, new releases, enhancements, and fixes. The application may work with other browsers or versions of those listed above. Coupa tracks popularity of browsers and platform trends, and other browsers may be added if they become prevalent with users. It is strongly recommended that customers do not use older versions of browsers as they are less secure, and backward compatibility is not generally supported. Coupa may still be accessed from older versions of web browsers, but customers may not have the intended best-in-class user experience.

The application uses HTML5 with no browser-specific extensions and requires no plugins. Also, responsive design so it will work with browsers and different form factor devices (e.g., tablets).



5. User Accounts and Administration

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5. User Accounts and Administration

The Solution should provide a variety of user account types from full access for system administrators to a tiered structure of limited access depending on the user's role. Bidders must provide a list of standard user roles and describe all capabilities for the definition of additional roles.

User accounts must be associated to a specific organization (e.g. Agency, Department, Non-State Entities) and have the capability to be authorized to buy on-behalf of multiple other organizations.

Administration of the Solution, including user setup/maintenance, should allow delegation assignment to authorized users to allow the option to distribute some administration responsibilities. This delegation capability must allow definition of the specific functions and organization(s) (e.g. Agencies, Departments, Non-State Entities) that the delegated Administrator will have access to manage.

Response requirement:

- RTM: Tab 4, TECH-6 through TECH-20
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the User Accounts and Administration objectives and requirements

When connected to the Coupa application, access to the functionalities and data is restricted by roles and content groups:

- **Roles** – Comprised of sets of permissions throughout the platform. Coupa provides a set of roles and additional roles can be created by copying or modifying an existing role. For a full list of standard user roles, please refer to Appendix A. From there, users are assigned a specific role. Additionally, Coupa can restrict access to almost any interface feature, including the content that the user sees, based on roles, privileges, and content groups.

Typical roles include Guest, Admin, User, Buyer, Accounts Payable, Central Receiving, Accounting Supervisor, Edit as Approver, Inventory Manager, Expense User, Expense Auditor, Expense Processor, Supplier, Dashboard, CFO Role, Split Accounting, and super admin.

- **Content Groups** – The Coupa content group functionality is a way to target and secure specific content for specific users. Security zones can be established by creating content groups. This limits access to catalog items, punchout sites, How to Buy policies, and Web Forms. Users can be assigned to content groups and each contract can be associated with specific content groups. A contract will only apply to users who are members of the contract's associated content group(s).

Coupa empowers its authorized users to act on behalf of multiple other organizations through the use of content groups. User roles can be associated with any organization (agency, department, non-state entity), and these roles can be used to define the authority to buy on-behalf of other users. Coupa lets users submit requisitions on behalf of another user. On the Review Cart page, Coupa includes a On Behalf Of field that can be used to search for another user. When a requester creates a req on behalf of someone else (known as the on-behalf-of user or OBO user), a few things happen:

- Any defaults on the OBO's user record are applied to the req (address, department billing info, etc.)
- The approval path is updated based on OBO's approval chains
- The OBO user is added as the first approver

Coupa also allows administrators to delegate assignments, such as approvals or receiving, to authorized users. This distribution of administration responsibilities is recorded in a history record. Delegated users are subject to the same controls as those under which they normally operate. Delegations can be perpetual or time-gated.



Coupa is including a list of standard user roles and descriptions separately for the Lead State and Participating Entities' evaluation. New roles may be added at any time by the application administrator which will include the name, description, and permission settings.

6. User Authentication

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6. User Authentication

The Solution must provide secure user authentication capabilities that are consistent with current security industry standards. The Solution should have the capability that can address individual Participating Entity standards including:

- User Provisioning;
- 2-Factor Authentication (2FA);
- Single Sign-on;
- Federation;
- Identity Proofing;
- Logging and Monitoring; and
- Password policies.

Response requirement:

- RTM: Tab 4, TECH-21 through TECH-25
 - Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the User Authentication objectives and requirements.
-

The Lead State and Participating Entities' administrator will manage user provisioning and be responsible for issuing new accounts to users and suppliers. Each new user will have a Welcome message emailed to him or her. The email will include a hyperlink for the user to access and create an initial password to access Coupa. Thereafter, users can change their passwords anytime when logged into the application.

Your system administrator(s) would be centrally responsible for user account provisioning (e.g. username, password policies, account activation/deactivation, security roles, permissions, etc.) and managing user profile data (e.g. name, email, title, phone, address, department, default locale, default currency, default account, content groups, P-cards, etc.). You can provision users through the setup interface of the Coupa application, or via API and flat file integrations.

Multi-Factor Authentication (MFA) and 2-Factor Authentication (2FA) should be maintained in the Lead State and Participating Entities' existing solution. Coupa provides MFA by offering SAML 2.0 (Security Assertion Markup Language) for SSO support between Coupa and the customer's Identity Provider. In this way, whichever MFA mechanisms are in place for a customer's users would extend to Coupa.

Coupa logs all system and application access with user history under the date and time stamps. The logs are retained according to Coupa's retention policy (3 year). Logs from all application components are generated and stored in the SIEM continuously. All user events are captured immediately (e.g., logins, failed logins, etc.) and the SIEM is monitored continuously using anomaly detection tools to trigger incidents in near real-time if abnormal behavior patterns are detected. A comprehensive audit trail for each document provides the ability to drill into further detail. Details include evidence regarding approval dates/times and history behind the document, ranging from changes and comments to status updates. Also, Coupa automatically tracks audit trails on users, user roles, and integrations. IT personnel and Compliance professionals have the tools that are required to establish and monitor IT controls over critical financial applications and data. Administrators can generate a parameterized audit trail report that includes:

- When the user was created
- Who created the user

- When the user was last updated
- Who last updated the user
- User last login date
- User history

In addition to the native authentication mechanism supported by Coupa, users are authenticated against the following:

- LDAP Directory – Coupa supports the use of an external Lightweight Directory Access Protocol (LDAP) or Microsoft Active Directory Server for authentication. This allows the user to log in to Coupa using the same credentials that they would use for their intranet applications. Integrating the Coupa instance with an organization's directory server provides the following benefits:
 - Users do not need to remember a new password for Coupa.
 - Password changes are reflected in Coupa instantaneously
 - Defined password policies are enforced in the directory server
 - Centralize account control through the Director Server
- Identity Provider – Coupa supports the use of SAML 2.0 (Security Assertion Markup Language) for federation and SSO support between Coupa and the Identity Provider. This allows the user to click on a link to Coupa and automatically be logged in, if they were already logged in to the SSO.

For customers using username/password authentication (as opposed to SSO/SAML 2.0), passwords are stored using a SHA-2 hash in the database. If using an SAML 2.0 compliant identity provider, users are required to have their own unique login credentials. Identity authentication and proofing are managed within the customer's identity provider (IDP).

The password policy is defined below:

- Length – 8 characters (default) or 12 characters.
- Complexity – Optional to force users to select a password that has a mix of alpha and numeric characters.
- Lockout Threshold – If a user has a specific number of consecutive login attempts that fail, the account can be locked out for a specified period (lockout period). The threshold can be set to none, three, or 10 failed attempts.
- Lockout Period – Requires a timeout period before a user can attempt another login after the lockout threshold is met. It can be set to none, 15, 30, 60 minutes, or require an administrator reset.
- Password Expiration – Requires that the password is changed after 30, 60, or 120 days.
- Password History – Requires that a user password not be the same as previous three or eight passwords.

The Lead State and Participating Entities has the option of requiring suppliers processing their orders through the Coupa Supplier Portal to log-in using two-factor authentication. Suppliers with this requirement will be prompted in the Supplier Portal to enter a authentication device to receive the authentication request, which is randomly generated anew with each login attempt.



7. Federated Identity Management

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7. Federated Identity Management

The Solution should provide user login capabilities that can be integrated with the Participating Entity's existing Federated Identity Management system and allow that system centralized administration and synchronization of user identities to enable user provisioning and de-provisioning of identity and access across the Participating Entity's systems. Additionally, the solution must not require multiple user-ids and passwords between Solution components.

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Federated Identity Management objectives and requirements.

Coupa supports federated identity management and authentication using SAML 2.0. This way the customer controls the authentication process using their own identity provider and MFA process. The Lead State and Participating Entities can provision users through the setup interface of the Coupa application, or via API and flat file integrations. Each user accessing the environment through Coupa-specific credentials is required to have a unique username and password to access Coupa. Coupa does not require multiple user-ids and passwords between components of the platform, and all modules are accessed with the same credentials.

8. Data Conversion

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8. Data Conversion

Implementation of the Solution may replace existing systems and may require data conversion of existing transactions/data. Proposals must provide complete details on Solution data conversion capabilities including describing data preparation requirements and responsibilities. Proposals must also describe available services that could be leveraged to support data conversion activities.

Response requirement:

- RTM: Tab 4, TECH-26 through TECH-34
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Data Conversion objectives and requirements.

Since Coupa serves as strategic extension to the Lead State and Participating Entities' financial systems it is critical that integrations are built and tested to support business processes and provide necessary data to external systems to run business. Integrations should be driven by the Lead State and Participating Entities' business requirements. This phase needs to be accompanied by signed off integration requirements and mapping documents where both technical and business teams work closely to align on deliverables. The Statement of Work (SOW) should serve as a basis for objects and method of integration agreed to with customer prior to implementation start. Design process review sessions should educate the Lead State and Participating Entities on our best practices and demonstrate our recommendations in alignment with their requirements and success goals.

Data conversion is discussed during implementation workshops. As part of an implementation, Coupa identifies master data that needs to be migrated from the legacy system to Coupa. This is normally imported in bulk with CSV files, either directly via the UI, or via sFTP. An important note is Coupa does not migrate historical transactional data, with the exception of contracts and multi-year open purchase orders. With regard to data extraction after go-live, CSV and APIs are available for all master and data objects in normal integration operations, whereas Coupa also offers additional sFTP export formats in case the customer needs to extract data to then import it regularly in an external BI tool.

In Coupa implementations, we work with you to migrate all data and configurations into your current instance. Coupa will work with you to load as much setup data as we have available into the system, and it is anticipated that Coupa will incorporate 50,000 supplier accounts and 300 contracts from the Lead State and Participating Entities' financial system. Note: If integration is in scope, it is recommended that a small subset of data (i.e. up to



500 total records across system configuration areas) be migrated into Coupa. The Client is responsible for providing all data in the Coupa provided formats. Coupa can assist with formatting, but data extracts/collection are to be performed by you. Coupa can also provide a migration of historical data via integration, if there are historical purchase orders or invoices that you would like to be migrated. The typical setup data elements loaded are:

- Suppliers
- Contracts
- Users
- Commodities
- GL Accounts
- Exchange Rates
- Approvals
- Client Catalogs

9. Interface and Integration

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9. Interface and Integration

Proposed Solutions must provide both interface and real-time integration capabilities. Proposals must provide complete technical details on these capabilities including, at a minimum, standards supported, restrictions, and identify all Finance systems/ERPs where the Solution has existing interface/integration capabilities available.

Response requirement:

- RTM: Tab 4, TECH-35 through TECH-59
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Interface and Integration objectives and requirements.

The power behind Coupa is its incredible flexibility. Quite simply – we’re open where others are closed. Coupa's open architecture allows customers to integrate 3rd party systems on the market. Our service can integrate with limitless types of software applications – from financial/ERP, to HR to Inventory Management. Integration can be set up for batch (master data exchange during non-business hours) or in near real-time integration (transaction exchange on an hourly basis).

The Lead State and Participating Entities can use the Coupa APIs or flat files to make seamless connections between Coupa and the PeopleSoft platform. Through our large and rapidly growing customer base we have integrated with well over a variety of ERP systems to date: PeopleSoft, Oracle, SAP, Lawson, Quickbooks, etc.

Coupa's flexibility allows it to be used for many different integration configurations. Often, master data sent from an ERP system can be sent to maintain similar data in Coupa, replacing the need for manual maintenance of data in Coupa. Examples include general ledger account codes, information about suppliers, and users (from ERP and/or Active Directory). Alternatively, this data could be maintained in Coupa and sent via integration to other internal systems.

Coupa also supports sending/receiving transactional data. Examples include requisitions, purchase orders, invoices, approved invoices (OK to pay), and receipts.

Coupa's standard integrations run on a polling schedule. This means that Coupa will interrogate the target system on a periodic basis to determine if data needs to be integrated. The frequency of the polling schedule can be controlled per business object. Typically, master or reference data (suppliers, users, accounting codes) is integrated on a daily basis, while transaction data (requisitions, receipts, purchases orders) is integrated on an hourly basis. It is recommended that data which is synchronized daily should be run during 'non-peak' hours (e.g., 4 am) to minimize the impact of additional system load produced by the integrations.

Each customer has different requirements for how they want to connect with their ERP and external systems. Customers should evaluate their current integration strategies to determine the best approach to integrate with Coupa, and our professional services are here to help you find the best solution.

For integration playbooks and best practices, please refer to: <https://success.coupa.com/Integrate>

10. Office Automation Integration

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10 Office Automation Integration

Proposals must describe Solution compatibility and any integration with Office Automation products. At a minimum, Bidders must address Microsoft Office suite products (Word, Excel, PowerPoint, etc.) and Adobe. The response must describe these capabilities to support, at a minimum, documents as attachments, automated generation of documents (e.g. purchase orders, solicitations, contracts), import/export of transaction data (e.g. requisition line items, solicitation line items, bid tabulations, evaluation scores, contract line items), and cut/paste of text into Solution text fields.

Response requirement:

- RTM: Tab 4, TECH-60
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Office Automation Integration objectives and requirements.

Since Coupa handles activities related to spend management directly in the application, extensive Office Automation Integration is not necessary. Attachments created using Microsoft Word, Excel, PowerPoint, etc. and Adobe can be imported into Coupa in bulk with CSV files, either directly via the UI, or via sFTP. File attachments in Coupa can be of standard Office document types, with type exceptions further described in the RTM responses. Documents, such as purchase orders, solicitations, and contracts, can be generated and automated in Coupa. SFTP or UI file uploads to import/export transaction data use Coupa CSV formats easily producible in Microsoft Excel. In addition, reporting in the application can be used to track transaction data and be exported to Microsoft Excel or CSV file. Cut and paste of text into Coupa data fields is a standard functionality. Coupa supports UTF-8 text encoding, allowing for the cut/paste of most text from Office products into the solution's text fields.

11. Mobile Device Support

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11. Mobile Device Support

The Solution functionality should be accessible from mobile devices including cell phones and tablets.

Response requirement:

- RTM: Tab 4, TECH-61
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Mobile Device Support objectives and requirements.

The Coupa application adjusts screen resolution to the user's device. Coupa can be accessed from desktops, laptops, tablets, or smartphones. Coupa is operating system agnostic and can be accessed from major web browsers. Coupa is browser-based and is designed according to the concept of responsive design – fully accommodating mobile use on tablets and mobile devices without affecting usability or functional coverage.



12. Mobile Applications

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12. Mobile Applications

The Solution should include Mobile Application capabilities that leverage mobile device specific functionalities. These Solution Apps must meet all of the relevant technical, audit and security controls as required of the full Solution.

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Mobile Applications objectives and requirements.

Coupa meets all of the relevant mobile technical, audit and security controls as required of the full Solution by the Lead State and Participating Entities. Coupa can be accessed via a browser on mobile devices or through a native mobile application available for download on Apple AppStore and Google Play. The entire application is accessible through the browser on a mobile device. Coupa is designed and optimized for mobile devices. Whether creating purchase requests, approving requests, flipping POs into invoices, or creating and submitting expense reports, Coupa will enable the Lead State and Participating Entities to spend smarter from anywhere. Key capabilities include:

- Push notifications for approval requests and for delivery of received goods
- Approve, reject, or hold requisitions, purchase orders, expense reports, service/timesheet requests, and forms
- Create and manage expense reports
- Shop for items from your organization catalogs, recommended items, and frequently purchased Open Buy Items, then submit your mobile cart as a requisition
- View your recently created or approved requisitions
- Do desktop receiving to mark goods as having been received
- View organization announcements

Coupa secures the mobile application through the following mechanisms:

- Authenticated connections using OIDC (OpenID Connect, an industry-standard also used by Coupa on the web)
- SSO supported, with the same choice of identity providers as Coupa on the web
- Role-based permissions associated with an authenticated connection
- Encrypted communications in transit (HTTPS)
- Encryption of the local cached data, using the native phone encryption built into iOS and Android
- Admin can remotely invalidate an authenticated token to disable access for a Coupa Mobile user.

13. Data Ownership and Access

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13. Data Ownership and Access

Participating Entity data in the Solution is owned by the Participating Entity. Participating Entity must be able to access and obtain/extract a copy of their data upon demand, including the associated data dictionary, and at no cost/charge.

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Data Ownership and Access objectives and requirements.

Lead State and Participating Entities will retain all ownership of its data, and a copy can be obtained/extracted at any time with a request to Coupa support. With regards to the Lead State and Participating Entities' proprietary data, within 60 days after the effective date of a contract termination, Coupa will make available for download a file of the data in a comma-separated value (.csv) format along with attachments in their native format at no cost/charge. After such 60-day period, Coupa shall have no obligation to maintain or provide customer data and shall thereafter, unless legally prohibited, delete all customer data in its systems or otherwise in its possession or under its control. Upon request, a certificate can be provided to confirm data destruction.

14. Data Retention, Archive, and Purge Considerations

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14. Data Retention, Archive, and Purge Considerations

The Solution must provide Archive and Purge capabilities which can conform to relevant Participating Entity document retention schedules.

Response requirement:

- RTM: Tab 4, TECH-62
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Data Retention, Archive and Purge objectives and requirements.

All data from Lead State and Participating Entities is stored in Coupa for the life of the contract or is subject to the relevant documentation schedules. Archiving will be managed within the Coupa application, and policies can be established to archive contracts, invoice, and purchase orders. Coupa does not purge data until after contract termination or expiration.

15. Disaster Recovery Plan

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15. Disaster Recovery Plan

Bidders must have a Disaster Recovery Plan for the Solution. The Plan will document the sequence of events and sequence of communications to follow in the circumstance that an internal or external interruption of service or infrastructure failure or natural disaster (act of nature).

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Disaster Recovery Plan objectives and requirements.

The Coupa Disaster Recovery and Business Continuity Plan is an operational document that is continually monitored and updated to reflect the current business operations. It covers various incident management, crisis management, and disaster recovery scenarios that could result in a business disruption. The plan is tested on an ongoing basis as Coupa supports customer production environments on a 24x7 basis. Verification of disaster recovery for hosting is completed monthly and Coupa Operations performs monthly reviews of disaster recovery events that occurred during the month. Complete testing of the plan occurs at least on an annual basis. Disaster Recovery is included with every subscription.

The Business Continuity Management (BCM) within Coupa covers the key personnel, resources, services, and actions required to maintain critical business processes and operations. This plan is intended to address extended business disruptions and is based on information contained in the following policies and processes:

1. Business Continuity Policy
2. Business Impact Assessment
3. Business Continuity Plan
4. Data Center Recovery – Spend Platform



5. Incident Response Plan
6. Activity Recovery Plans
7. Contingency Testing – Spend Platform
8. Business Continuity – Activity Recovery Testing
9. Incident Response Testing and Tabletop Exercise
10. Annual Business Continuity and Incident Response Training

Coupa's backup strategy documents sequence of events and sequence of communications to follow and allows critical operations to continue in the circumstance that an internal or external interruption of service or infrastructure failure or natural disaster. Additionally, Coupa employs a disaster recovery and business continuity plan that includes procedures for dealing with a potential disaster, identifies and defines key employees and their roles, and details instructions for restoring business functions. These instructions include the latest system descriptions and how they are tested. The application and data is replicated across multiple Availability Zones (AZ) and Regions so there is no single point of failure within a data center, and so that no one AWS data center is itself a single point of failure. All transactional customer data is stored in a fully managed SQL-compliant database which runs on the AWS RAID-class Elastic Block Storage (EBS) which replicates all production data across two different storage arrays within the same data center or AZ. The managed database is synchronously replicated to a second AZ so there is zero data loss in the event of a database hardware failure. Additionally, the hard drive image on which the SQL database is running is via an image snapshot every hour. The database images are stored in the AWS Simple Storage Service (S3), which creates three replicas of the data across two AZs, resulting in "11 nines" of availability. Backup data is stored online and secured through access controls. No production or backup data is written to removable medias such as tape or optical storage. System recovery in the event of a disaster is fully automated using Coupa initialization scripts and AWS automated deployment tools such as Cloud Formation. The Coupa Network Operations Center (NOC) performs continuous server monitoring and in the event of a detected server failure, an automated CloudWatch notification triggers the instantiation of a new compute instance, automatically installs the customer-specific gold software image, automatically configures the server, and automatically connects to the primary or backup EBS storage volume. In the event of a primary database failure, the AWS DNS service is notified, resulting in an automated redirect of subsequent user requests to the backup replica.



16. Solution Environments

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16. Solution Environments

The Solution must include the following system environments at a minimum:

- Development Environment – this environment should have the capability to be integrated with the Participating Entity's finance system development environment to facilitate development and unit/system testing of integration functionality.
- User Acceptance Test Environment – this environment will be used by the Participating Entity to validate functionality and system performance prior to release to Production. This environment should have the capability to be integrated with the Participating Entity's finance system test environment to facilitate testing of all procurement processes.
- Training Environment – this environment will have the same components, software, functionality as the Production environment and new releases/upgrades/changes made to Production will also be applied to the Training Environment at the same time as Production or at a schedule mutually agreed with the Participating Entity. This environment should have the capability to be integrated with the Participating Entity's finance system training environment to facilitate training on all procurement processes.
- Production Environment – this environment will provide user access to all components, software and functionality as required by the Contract.

Response requirement:

- RTM: Tab 4, TECH-63 through TECH-67
- Inline Narrative: Bidders must provide a detailed narrative response that describes overall solution components that will meet the Solution Environments objectives and requirements.

Coupa customers receive both Production and User Acceptance Test/Training (sandbox) environments for the life of our partnership. Implementation and integration testing are done in the Sandbox environment. Post go-live, the sandbox is used for new configuration testing to verify new approval rules, custom fields, or process changes before they are configured in your Production environment.

Coupa also offers additional environments to clients for an additional charge. Each environment is separated from each other and there is no automated interaction between the environments. A Development Environment is not required since customization of code is not permitted. Coupa is open for further discussions with the Lead State and Participating Entities should more than two environments are needed.

17. Solution Technical Architecture

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17. Solution Technical Architecture

Bidders are to provide technical architecture diagrams that provide a pictorial view of application modules/functions and the platform on which they reside, data architecture including common data exchange points with entity legacy applications, vendor's catalogs, and vendor order processing and data integration among Solution modules. Describe the development tools and languages used in developing application modules. Describe the techniques used in developing application modules. Describe the techniques used to exchange data. Identify network architecture components that are shared among customers and components dedicated to the proposed solution

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Solution Technical Architecture objectives and requirements.

Like many technology leaders in consumer web solutions, Coupa uses Ruby on Rails as the framework for its web application development. Ruby on Rails is fast and scalable, allowing Coupa to drive more innovation to its customers. Coupa develops using Agile development methodology, which allows the organization to frequently change, adapt and enhance, or release features and schedule based on demand. In addition, the architecture eases the integration of automated testing tool used by Coupa to maximize code quality. Figure 9 describes the Coupa platform architecture.



BSM Platform Architecture

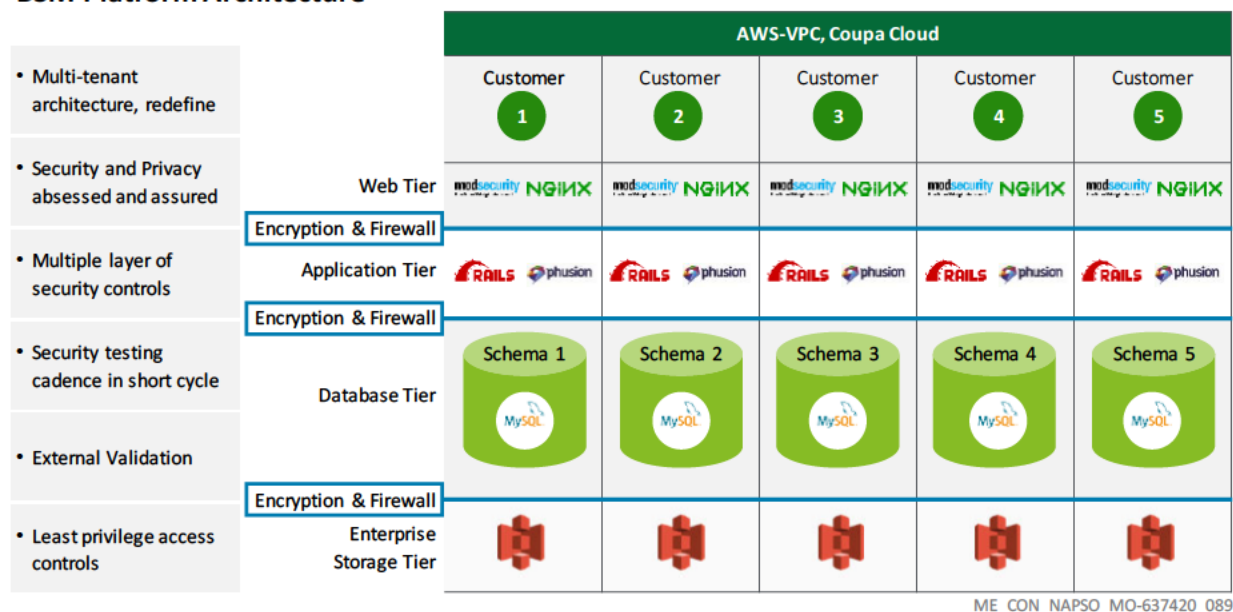


Figure 9. Coupa Platform Architecture.

Coupa's Cloud Business Spend Management (Cloud BSM) solution is delivered using a hosted, Software-as-a-Service model (SaaS). Leveraging the benefits of the Coupa Cloud, customers can realize extensive business value with much less in the way of initial implementation, integration, or infrastructure costs than what has been common with traditional enterprise IT projects. The advantages of the Coupa Cloud derive principally from the true cloud model of implementation and administration through configuration, industry-leading technical architecture, and world class deployment infrastructure.

True Cloud Model

The application is maintained via business-user friendly administration functions to significantly limit the burden on IT staff. Additionally, the multi-tenant architecture enables Coupa to collect unique market benchmarks and analytics useful to customers in managing their businesses.

Industry Leading Technical Architecture

Built from the ground up to be massively scalable and handle capacity as demand grows. Coupa is designed to be highly reliable, ensuring that performance expectations are met while maintaining separation and security across multiple customers.

World-Class Infrastructure

The foundation of Coupa's Cloud Service is the ability to deliver a secure, always available, and scalable service to the customer.

World-Class Infrastructure

The Coupa Cloud leverages the best of the Amazon Web Services (AWS). Through AWS customers receive top-tier Cloud Computing. With Amazon, Coupa can automatically scale the service during peak load periods. This provides the ability to continuously add users and customers without downtime or lead-time to procure new capacity – it's automated in the Coupa Cloud. Figure 10 describes the Coupa Cloud Operating Model.

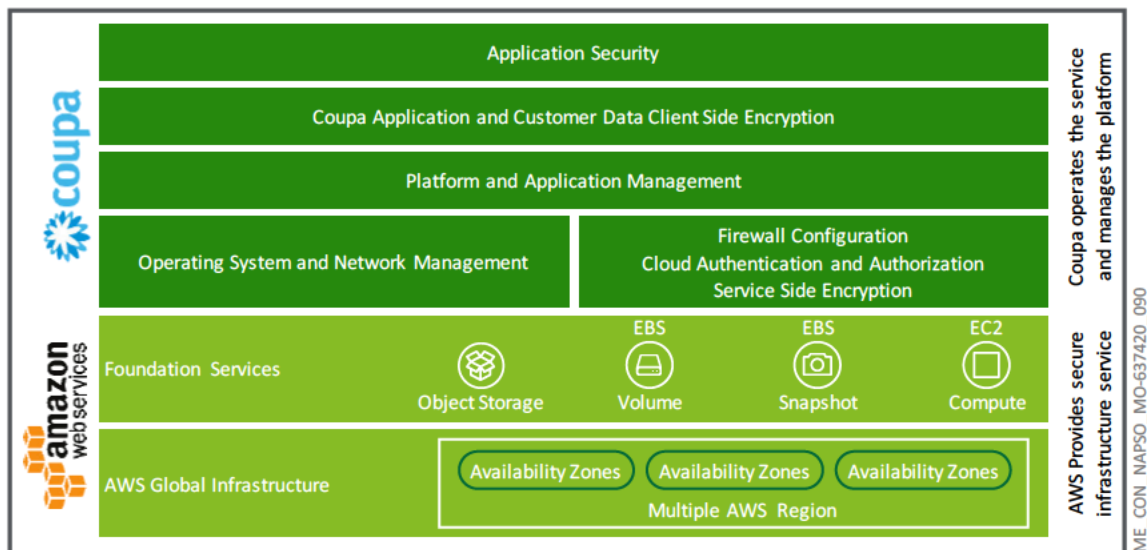


Figure 10. Cloud Operating Model.

AWS services operate under a model of shared responsibility between Coupa and AWS. By managing the physical infrastructure as well as those components that enable virtualization, AWS helps Coupa optimize its hosting operations. AWS operates the global cloud infrastructure that Coupa uses to provision a variety of computing resources such as processing and storage. The AWS global infrastructure includes the facilities, network, hardware, and operational software (e.g., host OS, virtualization software, etc.) that support the provisioning and use of these resources. Coupa assumes the responsibility and management of the guest operating system (including updates and security patches), the Coupa application, other associated application software as well as the configuration of the AWS provided security group firewall.

Coupa Business Spend Management Modules

Coupa offers a unified business spend management platform that is tightly integrated and delivers a broad range of capabilities that would otherwise require the purchase and use of multiple disparate point applications. The core of the platform consists of procurement, invoicing, travel and expense management, and payment modules that form Coupa's transactional engine and capture an organization's spend. In addition, the platform offers supporting modules, including supply chain design and planning, strategic sourcing, contract management, contingent workforce, treasury management, supplier and third-party risk management, inventory management, and spend analysis that help organizations further manage their spend. Moreover, through the Coupa open business network, suppliers of all sizes can easily interact with buyers electronically, thus significantly reducing paper, improving operating efficiencies, and reducing costs.

The Core of the Coupa Source to Pay application platform is its transactional engine, which is illustrated in Figure 11 and comprise of the following modules:

Procurement – The procurement module enables customers to strategically establish spend policies and approval rules to govern organization spending. The application provides an user friendly e-commerce shopping experience so employees can easily and quickly find the goods and services they need to do their jobs. Coupa's procurement module streamlines purchasing requisition and purchase order processes, allowing businesses to track and manage purchases in real-time, thus reducing time and cost. Upon approval of an employee request, purchase orders are automatically sent to suppliers for fulfillment and invoicing. Benchmark data allows customers to spot process inefficiencies, while configuration ease enables businesses to effortlessly adjust business processes to meet continually changing business requirements.

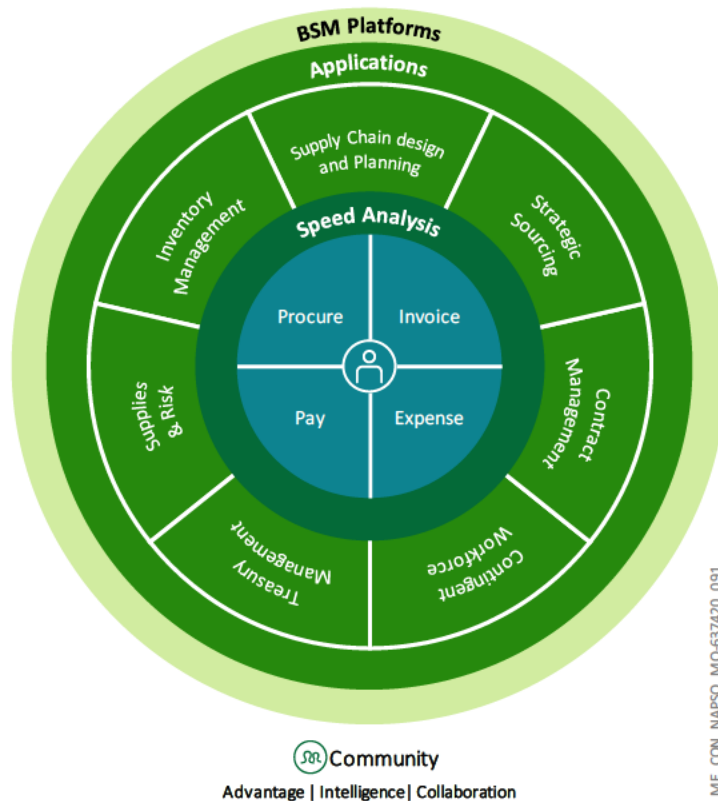


Figure 11. Coupa's Source to Pay Application Platform.

Invoicing – The invoicing module enables customers to improve cash management through the effective management of supplier invoices via embedded dashboards and work queues that prioritize invoices with early payment discount opportunities. Customers may quickly configure invoice approval and matching rules so invoices can be routed without accounts payable team member effort and cost. Easy, no-cost means for suppliers to create electronic invoices that comply with government regulations allow businesses to eliminate paper and further reduce their invoice processing costs, while reducing invoice payment fraud risk.

Travel & Expense Management – The expense management module enables customers to gain control of the expenses incurred by employees. Innovative mobile capabilities such as GPS and geo-location make it easy for travelers to create expense reports on-the-go so businesses gain real-time expense visibility. Frugal meter capabilities automatically assess the appropriateness of employee charges based on the customer's configured business processes. Seamless connectivity to credit card providers feed charges into our expense management module for added visibility and reporting ease.

Payments – Coupa addresses the challenges of manual processes and disparate systems with an all-in-one payment management solution to completely digitize the payment process. Part of the leading solution for business spend management (BSM), Coupa Pay gives organizations a true end-to-end procure-to-pay process. With Coupa Pay, customers can replace traditional p-cards and automate reconciliations by automatically tying completed payments to transactions. Other capabilities include automating access control, payment batch creation, and approvals while using Coupa's user controls and separation of duties to reduce error and fraud risk. Avoid misdirection of supplier payments by leveraging supplier remit-to details and bank account due diligence. By integrating early payment discount offers into the PO process customers can drive adoption, maximize card

rebates, and leverage card billing cycles to let cash managers maximize discounts and rebates while getting more flexibility to conserve cash.

Coupa's platform offers the following supporting modules that help organizations further manage their spend: Strategic Sourcing, Contract Management, Contingent Workforce, Risk and Performance Management, Treasury Management, Spend Analysis, and Supply Chain Design and Planning.

The entire process from purchase requisition through requisition approval, PO, receipt, invoice, and invoice approval is managed through Coupa. A standard flow of data between the ERP, Coupa, and supplier is illustrated Figure 12 – Coupa Data Flow.

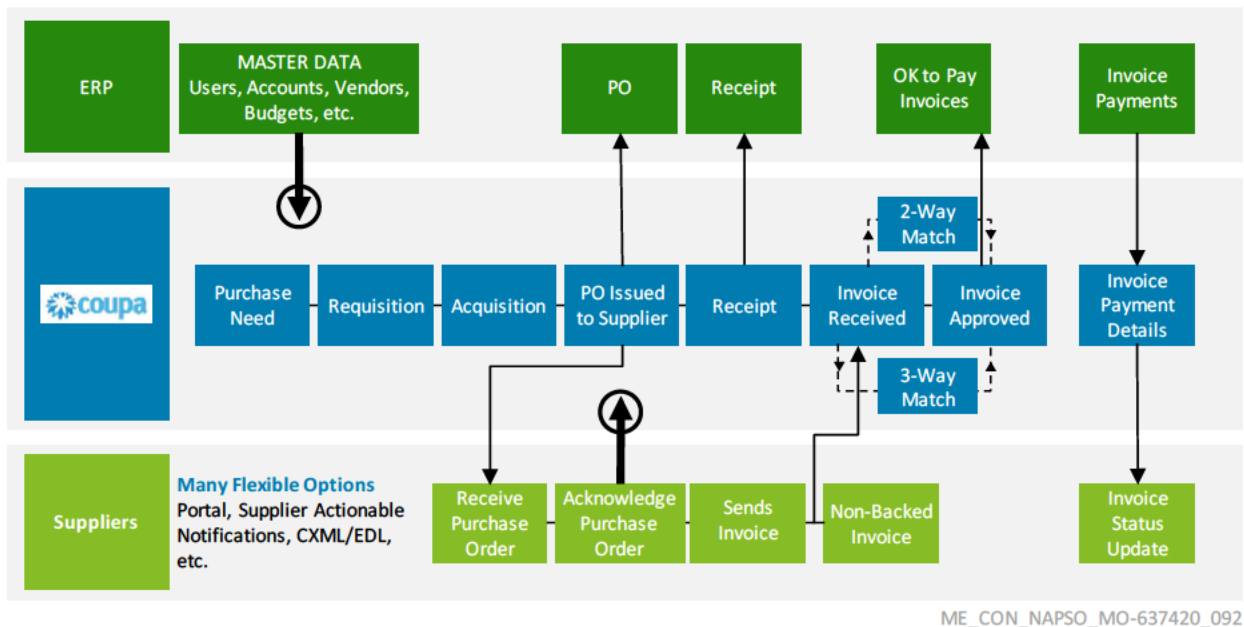
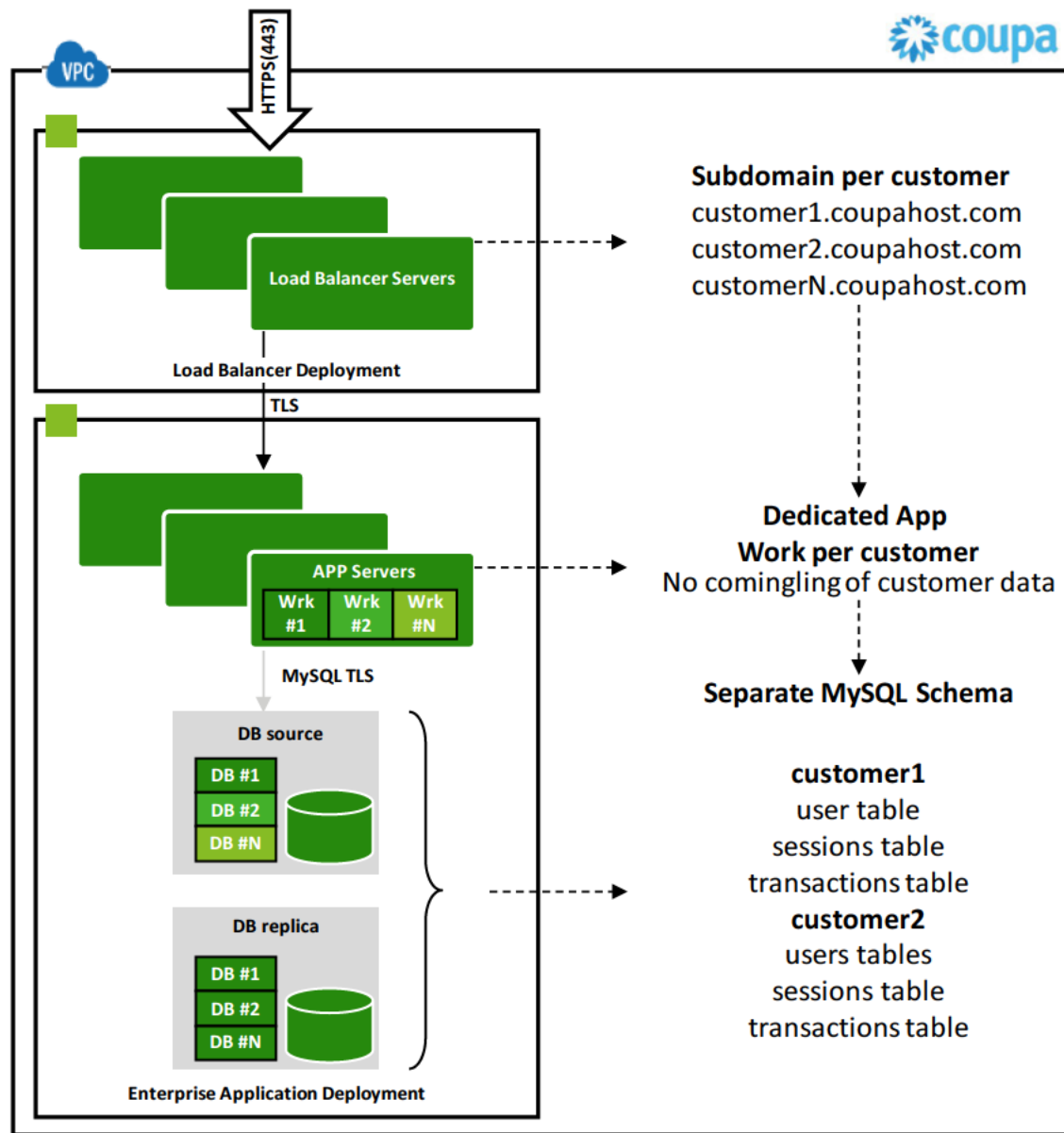


Figure 12. Coupa Data Flow.

Coupa Tenancy Model

Coupa is a SaaS-based application, hosted in a multi-tenant architecture, and accessible through a web browser. Figure 13 describes the Coupa tenancy model.

Customers are unable to see other customer's data. This is enforced on several layers of the architecture, including authenticated sessions, which are required for page access. Sessions are stored in cookies that do not encode identifiable customer information. To prevent ID spoofing, customer IDs are never transmitted or stored during page access.



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Figure 13. Coupa Tenancy Model.

Each Coupa customer has a separate database schema, a separate replica of the code, and separate S3 attachment storage access so that customer data can never commingle. The database infrastructure is completely segregated from the application servers and the internet by firewalls (Amazon security groups) and authentication between the application server and the database is secured with a password that is specific to each customer.



18. Solution Network Architecture

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18. Solution Network Architecture

Diagram the network architecture including network configuration, network access point(s) to the Internet, note Internet access bandwidth, internal data center network components, monitoring tools, backup hardware and software, and security hardware and software. Describe the web-hosting center including geographic locations, power, HVAC, floor space, user accessibility, physical security, and level of redundancy. Note that many States will not allow data to be stored outside of the United States. Describe platforms supported (hardware, operating systems, database management) and range of services available (including application management, system integration, benchmarking, high-availability configurations and disaster recovery).

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Solution Network Architecture objectives and requirements.

As illustrated in Figure 14, the Coupa application is hosted on a dedicated Amazon Virtual Private Cloud (VPC). Amazon VPC allows Coupa to provision a logically isolated section of the AWS cloud, where Coupa can launch AWS resources in a fully isolated virtual network. Coupa maintains complete control over the virtual networking environment, including IP address range selection, subnet creation, and route tables, and gateways configuration. An Amazon VPC is created on AWS's scalable infrastructure and divides the VPC's private IP address range into several private subnets. Data is stored on Amazon Elastic Block Store (EBS) and Simple Cloud Storage Service (S3). Coupa facilitates strict network segregation by isolating each tier (web, app server, and database tiers) in one or more Amazon security groups. An Amazon security group acts as a firewall for associated subnets, controlling both inbound and outbound traffic at the subnet level. Each server instance in the VPC is associated with one or more security groups. Rules defined within each security group allow traffic to or from its associated instances. By default, server instances associated with a security group cannot communicate with each other, unless enabled by specific added rules.

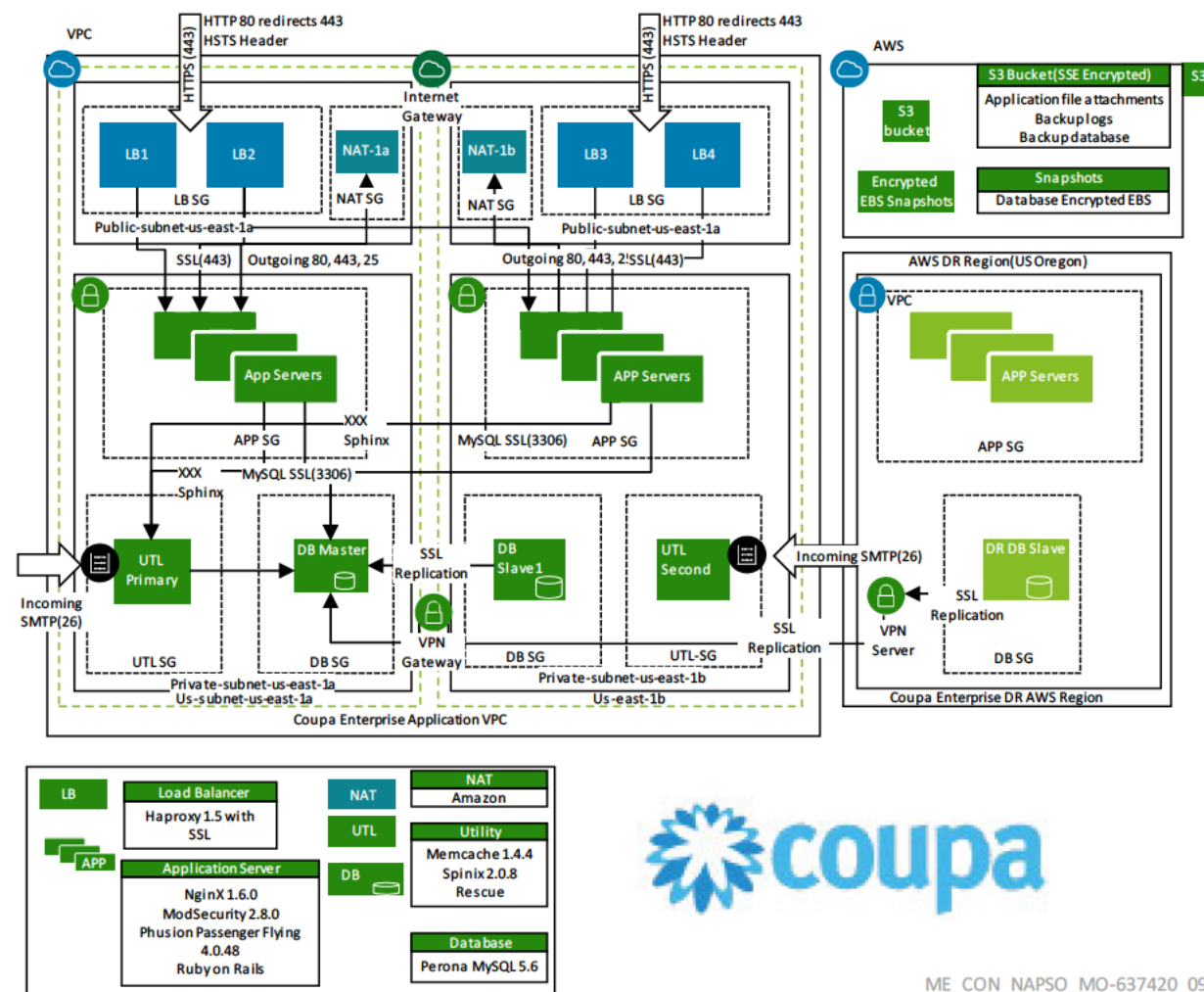


Figure 14. Coupa Network Architecture.

Coupa uses OSSEC for its Host-Based Intrusion Detection System (HIDS). In contrast to a Network Intrusion Detection system, which continuously monitors network segments for suspicious traffic, HIDS monitors logfiles for potentially malicious activity. It also monitors the network packets received on host interfaces.

OSSEC is composed of multiple pieces, which include a central manager for monitoring and receiving information from agents, Syslog, databases, and agentless devices. The agents collect information and forward it to the manager for analysis and correlation. Some information is collected in real-time and some are collected periodically.

Data Centers

Coupa provides customers with the ability to consistently access their data around the world. Data is automatically replicated between data centers to allow the Coupa service to remain constantly available. AWS maintains 21 hosting locations that are built in clusters across various global regions. Coupa leverages six of these locations. The AWS infrastructure provides the flexibility to place instances and store data within multiple geographic regions, as well as across multiple Availability Zones (AZ) within each region. All data centers are online and serving customers. In the event of a failure, automated processes move customer data traffic away from the affected area.



Each AZ is designed to be an independent failure zone. This means that the availability zones are physically separated within a typical metropolitan region and are in lower-risk flood plains. In addition to a discrete, uninterruptable power supply and onsite backup generation facilities, each data center is fed via different grids, from independent utilities to further reduce single points of failure.

The Coupa Disaster Recovery and Business Continuity Plan is an operational document that is continually monitored and updated to reflect the current business operations. It covers various incident management, crisis management, and disaster recovery scenarios that could result in business disruption. The plan is tested on an ongoing basis as Coupa supports customer production environments on a 24x7 basis. Verification of disaster recovery for hosting is completed monthly and Coupa Operations performs monthly reviews of disaster recovery events that occurred during the month. Complete testing of the plan occurs at least on an annual basis.

Coupa maintains very high availability through a fault tolerant and highly resilient architecture. Coupa uses automated scale-based load, which means the system can expand a contract based on the number of users or calculations occurring. Coupa runs billions of transactions and billions of dollars in spend through its system and has been shown to have a 99.999% uptime availability, in part because of the Amazon Web Services features and also because of the design of the product. Coupa's uptime and performance history is available at <http://www.coupa.com/success/system-up-time-metrics>

Distributing applications across multiple AZs provides the ability to remain resilient in the face of most failure modes, including natural disasters or system failures. The hosting location for each customer is determined based on their geographical location and specific hosting requirements. The Lead State and Participating Entities would be hosted within the United States. Coupa leverages the following seven Amazon regions as displayed in Figure 15:

Region	Availability Zones
US East (Virginia)	5
US West (Oregon)	3
EU (Ireland)	3
Frankfurt (Germany)	3
Australia (Sydney)	3
Asia (Singapore)	2
US GovCloud	2

Figure 15. Amazon Regions.

Physical Security

AWS data centers are housed in nondescript facilities. Physical access is strictly controlled at both the perimeter and at building ingress points. Professional security staff utilizes video surveillance, intrusion detection systems, and other electronic security measures. All visitors and contractors are required to present identification and sign in. Visitors and contractors are continually escorted by authorized staff.



Fire Detection and Suppression

Data centers are equipped with fire detection and suppression systems. The fire detection system utilizes smoke detection sensors in all data center environments, mechanical and electrical infrastructure spaces, chiller rooms, and generator equipment rooms. These areas are protected by either wet-pipe, double-interlocked pre-action, or gaseous sprinkler systems.

Power

Data center electrical power systems are designed to be fully redundant and maintainable without impact to operations, 24 hours a day, and seven days a week. Uninterruptible Power Supply (UPS) units provide backup power for critical and essential loads in the event of an electrical failure. Data centers utilize generators to provide backup power to the entire facility.

Climate and Temperature

Climate control is required to maintain a constant operating temperature for servers and other hardware. Maintaining a constant operating temperature prevents hardware systems from overheating, reducing service outages. Data centers are conditioned to maintain atmospheric conditions at optimal levels. Personnel and systems monitor and control temperature and humidity levels.

Infrastructure Issue Management

AWS monitors electrical, mechanical, and life support systems and equipment to immediately identify issues. Preventative maintenance is performed to maintain the continued operability of equipment.

Services Available

The AWS infrastructure includes the facilities, network, hardware, and operational software (e.g., host OS, virtualization software, high-availability delivery, etc.) that support the provisioning and use of these resources. Coupa assumes the responsibility and management of the guest operating system (including updates and security patches), the Coupa application, disaster recovery, benchmarking, and other associated application software as well as the configuration of the AWS security group firewall. System integrations and application configurations will be managed by the customer.



19. System Development Methodology

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19. System Development Methodology

Bidders must describe the system development including:

- How the development methodology ensures quality, long-term flexibility and reuse.
- Solution testing processes, tools and methods and how they:
 - Verify that the Solution meets the business requirements.
 - Ensure operational reliability.
 - Ensure quality.
- Application, network, and web-host server stress testing to ensure response time and reliability guarantees are met.
- Quality assurance program.
- Configuration/change management methodologies.

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the System Development Methodology objectives and requirements.

Development Methodology

Coupa uses the Agile Methodology with well-defined sprints and iterations for software development and conducts daily scrum meetings. This approach promotes evolutionary development, reduces time to introduce new features, and encourages flexible response to change. Once a product or feature is ready for development, Coupa follows an agile software development process using SCRUM/Sprint iterative methodology.

Underlying Coupa's software development lifecycle is Time Box, a project management technique that facilitates the development of each product release. At Coupa, a Time Box usually includes 3-5 Sprint cycles, or development cycle units, which last 2 weeks each. The Time Box promotes continual product development, by setting expectations for the time and effort to be dedicated to building specific product features and enhancements during each Sprint cycle.

Testing

After releasing code to production, Coupa uses both automatic scans and manual tests to discover security flaws. Coupa undergoes continuous automatic infrastructure penetration tests and application vulnerability assessments with Rapid7. In addition, extensive manual testing is performed every two months prior to each scheduled major release, using the services of HackerOne. In addition to release testing, HackerOne also performs continuous penetration testing in a dedicated environment. Coupa engages with KPMG and Bishop Fox to perform penetration testing with each major release.

Coupa runs tens of thousands of tests for every line of code that's put into Coupa. These tests run hundreds of times per day, and fall into four categories:

- Developer unit tests and quality engineering tests during development
- End-to-end scenario tests across supported browsers; automated regression and integration tests

- Early hardening tests; automated and manual regression tests; performance tests against customer clone instances; further integration tests
- Late hardening tests; automated and manual regression tests; upgrade and migration testing; final integration tests

Stress & Performance Testing

Coupa employs real-time performance monitoring tools to track availability, response time, and database query load. These systems are real-time monitors and not in a distributable format. Coupa can dump the raw data into a report on demand with 72 hour notice of request. Coupa maintains a variety of testing and operational management approaches to facilitate performance is maintained under operational conditions, load, etc. Performance testing of the application is performed prior to every major release but in addition, Application Performance Management (APM) is used to monitor performance in operation. This is used to determine adequate resources are available to the VPC environment and to scale as required.

Quality Assurance

Before code goes live, it undergoes rigorous testing by Coupa's QE team to facilitate a high level of quality and customer satisfaction.

Our QE team tests the code developed during each Sprint cycle using a set of test scripts. Critical features are also tested through a number of automated unit test and selenium scripts. If bugs or issues are identified, a ticket is generated and routed back to our development team so the necessary repairs can be made.

QE testing is ongoing throughout the development process and sprint cycles. Once all the code has been developed for features targeted for the product release, our QE team performs full application testing. The Coupa application must successfully execute all test scenarios before the new product features and enhancements are deployed in Coupa's production system and released for customer availability.

Configuration Management

Coupa maintains documented Systems Development Life Cycle (SDLC) policies and procedures to guide personnel in documenting and implementing application and infrastructure changes. Change control procedures include change request and initiation processes, documentation requirements, development practices, quality assurance testing requirements, and required approval procedures.

Various controls have been put in place to manage change requests based on the different communication channels through which they are received and the nature of the change request. A ticketing system has been implemented that identifies a change request and routes it to the appropriate technical personnel. Research and documentation are thoroughly completed for each item. A complex defining process is initiated for each item after which a design document is generated and reviewed with a control team. The all-encompassing principles followed in this process are acquired from ITIL techniques.



20. Service Level Agreement

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20. Service Level Agreement

Bidders must review and indicate compliance to the attached Service Level Agreement standard. Bidders must also provide a copy of their current standard Service Level Agreement and describe flexibility to adjust to any specific requirements that a Participating Entity may have.

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the objectives and requirements of Data Access.

Coupa has reviewed and acknowledged the RFP Exhibit 2: Model Service Level Agreement (SLA), and the Lead State and Participating Entities' framework and requirements relating to service level commitments align with Coupa's ability to deliver the solution. The Coupa offers a monthly system uptime SLA, issue response targets, and recovery time/point objectives. These support and delivery objectives are made consistent across Coupa's 2,000+ customers. Best effort is made to maintain flexibility with unique customer SLA requirements, but Coupa is unable to guarantee full compliance to the Exhibit 2: Model SLA document at this time. Please see support targets and uptime descriptions below.

Coupa offers a contractual uptime SLA of 99.8% system availability. The system's scalability helps facilitate Coupa meets its SLA on availability. Coupa uses automated scale-based load, which means that its system can expand a contract based on the number of users or calculations occurring. Coupa runs billions of transactions and billions of dollars in spend through its system and has been shown to have a 99.999% uptime availability, in part because of the Amazon Web Services features and also because of the design of the product.

To read more concerning our uptime and metrics please review the following link:

<https://success.coupa.com/Trust/System Up Time and Metrics>

For service level response targets, Coupa has prioritized the severity levels of issues that you may come across during your usage of Coupa. Severity is categorized from Levels 1-4. Our response time to customer issues is based on the level of support contracted.

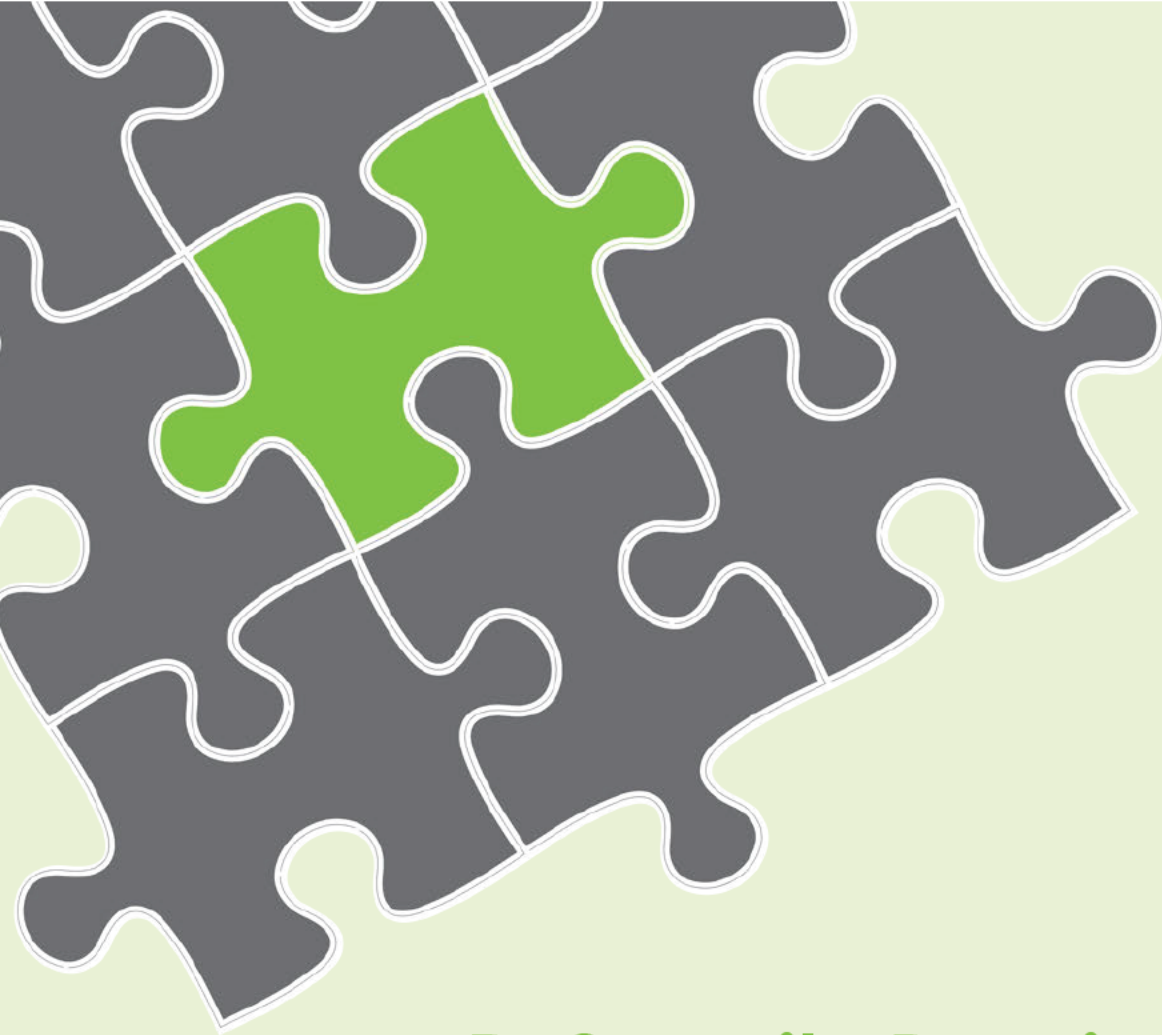
- Severity 1: Severe production issue that results in Coupa being completely unavailable causing a critical impact to business operations.
- Severity 2: Serious issue with a major function of Coupa or a consistent issue in common functionality. Issue results in severe inconvenience and/or major impact to business operations.
- Severity 3: Intermittent issue in common functionality or a consistent failure in less common functionality. The issue has no or low impact to business operations.
- Severity 4: Request for information or general assistance on capabilities or configuration

Please refer to Figure 16 – Coupa Service Level Response Targets, where specific response times are provided, based on severity level.

Service Level Targets	Premium Support	
	Initial Response	Query Response
Severity 1	30 minutes	1 hour
Severity 2	2 hours	6 hours
Severity 3	2 business days	2 business days
Severity 4	5 business days	5 business days

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Figure 16. Coupa Service Level Response Targets.



D. Security Requirements





D. Security Requirements

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D. Security Requirements

Bidders proposing a Solution in response to the Functional requirements must respond to all Security Requirements sections in this RFP.

1. Cloud Security Alliance (CSA) Compliance

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1. Cloud Security Alliance (CSA) Compliance

Bidders must, at a minimum, complete, provide, and maintain a completed CSA STAR Registry Self-Assessment. Bidders must either submit:

- A completed The Consensus Assessments Initiative Questionnaire (CAIQ)
<https://cloudsecurityalliance.org/artifacts/consensus-assessments-initiative-questionnaire-v3-1/>
OR
- Submit a report documenting compliance with Cloud Controls Matrix (CCM)
<https://cloudsecurityalliance.org/artifacts/cloud-controls-matrix-v3-0-1/>

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Cloud Security Alliance Compliance objectives and requirements.

Coupa has completed the Consensus Assessments Initiative Questionnaire (CAIQ) and maintains this document for customer evaluation. This survey is provided by the Cloud Security Alliance (CSA) for cloud consumers and auditors to assess the security capabilities of a cloud service provider. Please refer to the attached File 3 Deloitte - Proposed Solutions and/or Services Consensus Assessments Initiative Questionnaire (Coupa).

2. Security and Privacy Controls

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2. Security and Privacy Controls

Bidders must indicate their level of compliance with NIST (SP) 800-53 and identify the actual or equivalent baseline level (low, moderate or high) as defined in Attachment D of the NIST 800-53 publication.

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Security and Privacy Controls objectives and requirements.

Coupa's information security framework is based on National Institute of Standards and Technology (NIST), FedRAMP, and ISO 27001 principles. Coupa privacy standards also align with NIST 800-53 Rev. 4 guidelines. For example, the key management infrastructure uses Federal Information Processing Standards (FIPS) 140-2 approved cryptographic algorithms and is consistent with NIST 800-57 recommendations. Coupa uses NIST controls as guidance, and is not fully compliant. AWS Cloud infrastructure on which Coupa is hosted have been validated by third-party testing performed against the NIST 800-53 Revision 4 controls for High Impact.

Finally, Coupa is an offering available on the FedRAMP Marketplace identified as FedRAMP Moderate Ready with fully certified status expected by year end of 2021.



3. Security Certifications

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3. Security Certifications

Bidders must list all government, standards organization or third-party security attestations, certifications and credentials it currently holds that apply specifically to the Bidder's proposal, as well as those in process at time of response. Specifically include HIPAA, FERPA, CJIS Security Policy, PCI Data Security Standards (DSS), IRS Publication 1075, FISMA, NIST 800-53, NIST SP 800-171, and FIPS 200 if they apply.

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Security Certifications objectives and requirements.

Coupa and AWS undergo an intensive certification program every six months for controls relevant to the financial reporting and annually for controls relevant to the security of the solution. The certification program includes audit reports on the organization in place, the processes, their enforcement through documented procedures, the tooling automating the solution operation, and the audit trail.

Coupa has invested heavily in multiple compliance certification programs. The independent audits recognize the maturity of Coupa's solution, the commitment to be fully transparent to customers and its focus on providing the most robust and secure solution. Coupa currently maintains the following certifications:

- SSAE 18 Type II SOC 1: Certified every 6 months
- SSAE 18 Type II SOC 2: Annually
- ISO 27001: Annually
- TUV Rheinland Cloud Certification: Annually
- PCI DSS: Annually

Request Coupa compliance reports from the following link http://get.coupa.com/Compliance-Reports_Request-Report.html

Coupa's Healthcare Cloud provides customers with the protections of ePHI required by HIPAA.

Coupa has completed the CSA STAR self-assessment which is available to customers and prospects. The Coupa submission is publicly available at <https://cloudsecurityalliance.org/star-registrant/coupa-software/>

The CSA STAR self-assessment is a complimentary offering that documents the security controls provided by various cloud computing systems. This allows users to assess the security of cloud providers for which they currently use or are considering.

The AWS global infrastructure is designed and managed according to security best practices as well as a variety of security compliance standards. The AWS compliance program enables customers, such as Coupa, to understand the robust security in place and then helps streamline its compliance with industry and government requirements for security and data protection. The IT infrastructure provided by AWS to its customers is designed and managed in alignment with security best practices and a variety of IT security standards which include:

- SOC 1/SSAE 18/ISAE 3402 (formerly SAS 70), SOC 2, and SOC 3
- FISMA, DIACAP, and FedRAMP
- DOD CSM Levels 1 – 5
- PCI DSS Level 1



- ISO 27001
- ITAR
- FIPS 140-2
- MTCS Level 3

Compliance reports can be requested directly from AWS: <https://aws.amazon.com/artifact/>

4. Annual Security Plan

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4. Annual Security Plan

Upon award Contractors must develop, implement and thereafter maintain annually a Security Plan that is in alignment with the National Institute of Standards and Technology (“NIST”) Special Publication (SP) 800-53 (current, published version). Proposals must describe the Security Plan that will be provided and must include/address the following items related to the system and services:

- Security policies;
- Logical security controls (privacy, user access and authentication, user permissions, etc.);
- Technical security controls and security architecture (communications, hardware, data, physical access, software, operating system, encryption, etc.);
- Security processes (security assessments, risk assessments, incident response, etc.);
- Detail the technical specifics to satisfy the following;
- Network segmentation;
- Perimeter security;
- Application security and data sensitivity classification;
- PHI and PII data elements;
- Intrusion management;
- Monitoring and reporting;
- Host hardening;
- Remote access;
- Encryption;
- Participating Entity-wide active directory services for authentication;
- Interface security;
- Security test procedures;
- Managing network security devices;
- Security patch management;
- Detailed diagrams depicting all security-related devices and subsystems and their relationships with other systems for which they provide controls; and
- Secure communications over the Internet.

The Security Plan must detail how security will be controlled during the implementation of the Solution and Services and describe the following:

- High-level description of the program and projects;
- Security risks and concerns;
- Security roles and responsibilities;
- Program and project security policies and guidelines;
- Security-specific project deliverables and processes;
- Security team review and approval process;
- Security-Identity management and Access Control for Bidder and Participating Entity joiners, movers, and leavers;
- Data Protection Plan for personal/sensitive data within the projects;
- Business continuity and disaster recovery plan for the projects;
- Infrastructure architecture and security processes;
- Application security and industry best practices for the projects; and
- Vulnerability and threat management plan (cyber security)

Response requirement:

- RTM: N/A
 - Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Annual Security Plan objectives and requirements.
-

Coupa will comply with the Lead State and Participating Entities' requirements for an Annual Security Plan. The Coupa information security program in place covers the elements required by the Lead State and Participating Entities and is aligned to ISO 27001, FedRAMP, and NIST SP 800-53 standards. Coupa is an offering available on the FedRAMP Marketplace identified as FedRAMP Moderate Ready with fully certified status expected by year end. Coupa also undergoes annual SSAE 18 and ISO 27001 audits. Coupa's SOC 1 and SOC 2 audit reports signify that Coupa has had its control objectives and control activities examined by an independent accounting and auditing firm and that these controls fairly presented the controls in operation as of a specific date and were suitably designed to achieve the control objectives. These certifications guarantee that the Coupa service delivers security policies, logical security controls, technical security controls and security architecture, security processes, network segmentation, perimeter security, application security and data sensitivity classification, PHI and PII data protection, intrusion management, monitoring and reporting, host hardening, remote access, encryption, directory services for authentication, interface security, security test procedures, managing network security devices, security patch management, security diagrams, and secure communications.

The Information Security Policy has been created as a component of the overall Information Security Management System (ISMS). The Coupa Information Security Policy facilitates Coupa properly assesses risks, develops mitigating strategies, and monitors the effectiveness of policies and controls. The ISMS outlines Coupa's mission and objectives as they relate to information security. This includes information security roles and responsibilities, information security policies and procedures, communication of employees' responsibilities, and a framework for how the information security program is to be carried out. In addition, the program includes strategies for ongoing evaluation and adjustment including the addressing of compliance issues, and management reporting.

The Policy has been reviewed, approved, and is endorsed by Coupa management. Coupa management facilitates that the security requirements outlined in this policy are adapted to the organization's objectives with respect to information protection. It is Coupa's Policy:

- To maintain accessible, reliable, and secure assets that strengthen the ability to achieve business objectives
- To safeguard the confidentiality, integrity, and availability of customer data and assets under Coupa control or are accessible via Coupa's products or personnel
- To maintain confidentiality, integrity, and availability of information by protecting it from unauthorized disclosure, modification, disruption, and destruction
- That all elements that have not been specifically identified as the property of other parties that traverse, reside on, or are part of Coupa Computer Resources are the property of Coupa and are treated as though each is a Coupa corporate asset

During the implementation, Deloitte will work with Coupa to develop supporting security strategy and security plan to address the security management needs.

Develop Security Strategy

Deloitte has been named the global leader in cybersecurity consulting by ALM Intelligence and Forrester many years in a row. Our professionals have the breadth and depth in the latest cybersecurity technology. We understand the importance of bringing the broad cybersecurity point of view as our clients take on the ERP implementation journey.

During the Architect phase, we will help the Participating Entity to develop the security strategy and security plan to lay the foundation on how to address the security and regulatory risks during and after the implementation. To

develop the comprehensive security strategy, we will bring leading practices in security design from numerous Coupa solution implementations and assessments that we have performed in the past. We will help the Participating Entity to define the security objectives, develop the security implementation approach, establish the security guiding principles, and identify the **roles and responsibilities** throughout the project. Our goal is to help the Participating Entity to design, document, test, and deploy a security model that is efficient, scalable, and compliant with your information security and regulatory requirements.

Develop Security Plan

Deloitte recognizes security policies and procedures are the foundational management controls upon which the security plan will be constructed. A documented set of security policies, standards, and procedures across the various security domains based on industry guidelines and industry practices is a must.

Our strategy to help the Participating Entity meet regulatory and internal information security requirements uses our internally developed security risk framework which contains a rationalized set of requirements and associated risk statements. The framework consists of a common repository of information security requirements containing authoritative sources from more than 300 different laws and industry sources, including the National Institute of Standards and Technology (NIST) Special Publication (SP) 800 series. In concert with the Participating Entity, we will use our security risk framework as a baseline to define the relevant security controls for your Coupa solution, which form the foundation for the tailored security plan.

This risk-based framework will help address the security and compliance tracking requirements for the implementation and can accelerate the evaluation of regulatory compliance. Using the framework as an accelerator will allow us to deliver within the requested time frame while addressing your security and privacy objectives. It will facilitate the development of a broad security perspective that covers the following areas:

- High-level description of the program and projects
- Security risks and concerns
- Security roles and responsibilities
- Program and project security policies and guidelines
- Security-specific project deliverables and processes
- Security team review and approval process
- Security-Identity management and Access Control for Bidder and Participating Entity joiners, movers, and leavers
- Data Protection Plan for personal/sensitive data within the projects
- Business continuity and disaster recovery plan for the projects
- Infrastructure architecture and security processes
- Application security and industry best practices for the projects
- Vulnerability and threat management plan (cyber security)

Coupa solution processes sensitive information depending on the function in use. The function and the information processed by the function collectively are known as the “risk profile”. The standards applicable to a given risk profile are based on the data or information type processed by the function. We will develop a security

plan that pays consideration to the security and privacy controls for each “profile” such that these controls address the applicable requirements from relevant regulations and standards. The risk framework will also help facilitate development of a tailored security plan specific to the Participating Entity’s compliance and information security requirements.

To support the Security Plan, Coupa protects its application infrastructure by using state-of-the-art firewalls at the hypervisor, kernel, and application levels, as well as intrusion detection systems across all servers. We contract with third-party security firms and consultants to conduct vulnerability threat assessments including penetration tests. Assessments are performed on a periodic basis to facilitate vulnerabilities are identified and mitigated. Virtual infrastructure is routinely scanned using Rapid7 Nexpose. Coupa’s anomaly detection system instantly notifies operations staff, 24/7, if anything unusual is detected.

Please refer to Figure 17: Coupa Layered Defense Model for a detailed diagram depicting security-related devices that protect the application, infrastructure, and customer data.

Coupa Layered Defence Model

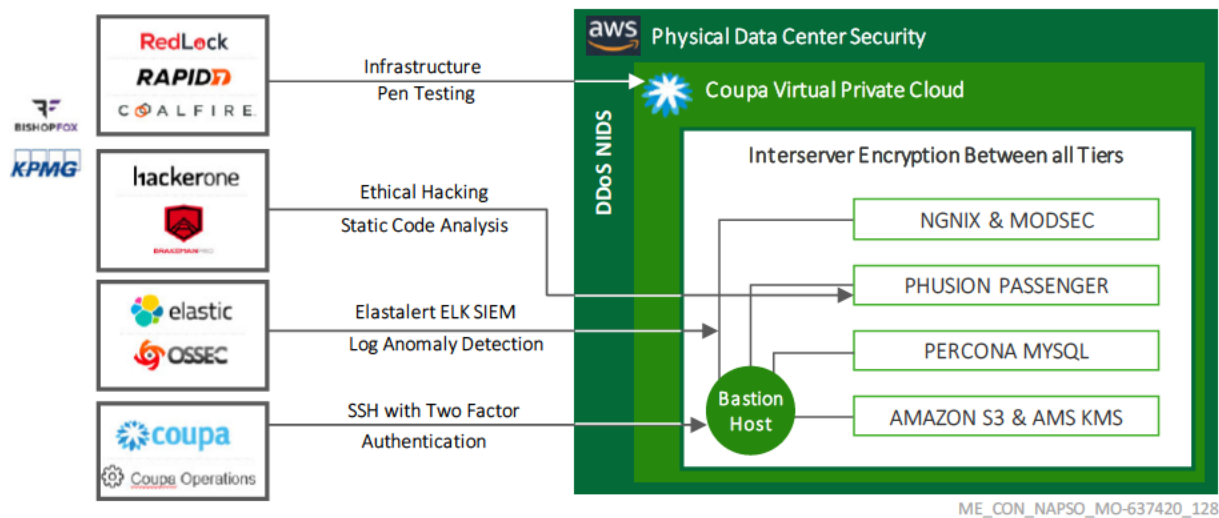


Figure 17. Coupa Layered Defense Model.

5. Secure Application and Network Environment

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5. Secure Application and Network Environment

Bidders must provide a robust boundary security capacity that incorporates generally recognized system hardening techniques. This includes determining which ports and services are required to support access to systems that hold Participating Entity Data, limiting access to only these points, and disable all others.

Proposals must provide, at a minimum, the following details:

- Use of assets and techniques such as properly configured firewalls, a demilitarized zone for handling public traffic, host-to-host management, Internet protocol specification for source and destination, strong authentication, encryption, packet filtering, activity logging, and implementation of system security fixes and patches as they become available.
- Use of two-factor authentication to limit access to systems that contain particularly sensitive Participating Entity Data, such as personally identifiable information.
- Assume all Participating Entity Data is both confidential and critical for Participating Entity operations. Confirm that Bidders security policies, plans, and procedure for the handling, storage, backup, access, and, if appropriate, destruction of Participating Entity Data will be commensurate to this level of sensitivity unless the Participating Entity instructs the Bidders otherwise in writing.
- Appropriate intrusion and attack prevention and detection capabilities. These capabilities must track unauthorized access and attempts to access Participating Entity Data, as well as attacks on the Bidder's infrastructure associated with the Participating Entity Data. Further, Bidders must monitor and appropriately address information from its system tools used to prevent and detect unauthorized access to and attacks on the infrastructure associated with the Participating Entity Data.
- Use of appropriate measures to ensure that Participating Entity Data is secure before transferring control of any systems or media on which Participating Entity Data is stored. The method of securing the Participating Entity Data must be appropriate to the situation and may include secure overwriting, destruction, or encryption of the Participating Entity Data before transfer of control. The transfer of any such system or media must be reasonably necessary for the performance of the Bidder's obligations under this Contract.
- Security controls, both physical and virtual Zones of Control Architectures (ZOCA), used to isolate hosted servers.
- A business continuity plan in place that the Bidder tests and updates at least annually. The plan must address procedures for response to emergencies and other business interruptions. Part of the plan must address backing up and storing data at a location sufficiently remote from the facilities at which the Bidder maintains Participating Entity Data in case of loss of Participating Entity Data at the primary site. Bidders backup solution must include plans to recover from an intentional deletion attempt by a remote attacker with compromised administrator credentials (e.g., keeping periodic copies offline, or in write-only format).

The plan also must address the rapid restoration, relocation, or replacement of resources associated with the Participating Entity Data in the case of a disaster or other business interruption. Bidders business continuity plan must address short- and long-term restoration, relocation, or replacement of resources that will ensure the smooth continuation of operations related to the Participating Entity's Data. Such resources may include, among others, communications, supplies, transportation, space, power and environmental controls, documentation, people, data, software, and hardware. Bidders also must provide for reviewing, testing, and adjusting the plan on an annual basis.

- Prohibit Participating Entity Data to be loaded onto portable computing devices or portable storage components or media unless necessary to perform its obligations under an associated Participating Entity agreement. If necessary, for such performance, the Bidder may permit Participating Entity Data to be loaded onto portable computing devices or portable storage components or media only if adequate security measures are in place to ensure the integrity and security of the Participating Entity Data. Those measures must include a policy on physical security for such devices to minimize the risks of theft and unauthorized access that includes a prohibition against viewing sensitive or confidential data in public or common areas. In addition, all Participating Entity data on portable media shall be encrypted.
- Ensure that portable computing devices utilized by the Contractor have anti-virus software, personal firewalls, and system password protection. In addition, describe the encryption of Participating Entity Data when stored on any portable computing or storage device or media or when transmitted from them across any data network.
- Maintain an accurate inventory of all portable computing devices and the individuals to whom they are assigned.

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Secure Application and Network Environment compliance objectives and requirements.

Coupa tracks unauthorized access and attempts to access Participating Entity Data, as well as attacks on the Coupa infrastructure associated with the Participating Entity Data. Coupa has a comprehensive boundary security capacity in place that incorporates generally recognized system hardening techniques. Coupa enforces tight operating system-level security by maintaining a minimal number of access point to all production servers. All operating systems are maintained at each vendor's recommended patch levels for security and are hardened by disabling or removing unnecessary users, open ports, and processes.

Secure Network Techniques: Front-end servers are behind firewalls and only accessible via https protocol. Database servers inside the perimeter firewalls are protected using proprietary non-routable IP addressing schemes, network address translation and more.

Coupa enforces tight operating system-level security by maintaining a minimal number of access points to all production servers. Operating system accounts are protected using secure public key authentication and only operations personnel has access to the servers. Operating systems are maintained at each vendors recommended patch levels for security and are hardened by disabling or removing unnecessary users, open ports, and processes. Access to the databases is controlled through limited and separately access-controlled passwords.

Coupa employees do not have direct access to production equipment, databases or customer data, except where necessary for system management, maintenance, and backups. Access to customer data is further restricted to technical and customer support staff on a need-to-know basis. No parties outside Coupa have access to customer data unless required by law.

Amazon EC2 provides a complete firewall solution; this mandatory inbound firewall is configured in a default deny-all mode and Amazon EC2 customers must explicitly open the ports needed to allow inbound traffic. The traffic may be restricted by protocol, by service port, as well as by source IP address (individual IP or Classless Inter-Domain Routing (CIDR) block).

The firewall can be configured in groups permitting different classes of instances to have different rules. Consider, for example, the case of a traditional three-tiered web application. The group for the web servers would have port 80 (HTTP) and/or port 443 (HTTPS) open to the Internet. The group for the application servers would have port 8000 (application specific) accessible only to the web server group. The group for the database servers would have port 3306 (MySQL) open only to the application server group. All three groups would permit administrative access on port 22 (SSH), but only from the customer's corporate network. Highly secure applications can be deployed using this expressive mechanism.

Two-factor Authentication: Access to Coupa networks and application is controlled by authentication mechanisms. Access to all information systems supporting the Coupa platform is controlled by an authentication system (Bastion host) and multi-factor authentication using a combination of an SSH key and an on-time password delivered by Google Authenticator. Access to administer the production environment, including the SSH gateway and infrastructure management application is restricted to authorized members of the operations department.

Customer Data Criticality: Coupa classifies customer data as Customer Confidential and handling of customer confidential data is documented in the internal Coupa Asset Management (Data Classification and Handling) policy. Access is limited to personnel with a business need-to-know. All customer data is protected in accordance with the Coupa Statement of Applicability.

Intrusion Detection and Prevention: Coupa protects its application infrastructure by using state-of-the-art firewalls at the hypervisor, kernel, and application levels, as well as intrusion detection systems across all servers. Coupa's anomaly detection system instantly notifies operations staff, 24/7, if anything unusual is detected. In addition, Coupa conducts vulnerability threat assessments including penetration tests.

Secure Transfer of Customer Data: Coupa requires data transfer agreement for all suppliers, sub processors, and customers be documented via a data processing agreement (DPA). Data transfers between countries is prohibited and all customer data must remain in the region identified by the customer upon establishment of a Master Service Agreement (MSA). Network controls are in place to mitigate risks to the Coupa platform and corporate environment when data is transferred across the network.

Security Controls to Isolate Servers: Coupa instances reside within a private subnet that is hosted on an Amazon Virtual Private Cloud (Amazon VPC). Amazon VPC allows Coupa to provision a logically isolated section of the Amazon Web Service (AWS) cloud. From the AWS cloud, Coupa can launch AWS resources in a fully isolated virtual

network. Coupa maintains complete control over the virtual networking environment, including the configuration of the IP address range, subnets, route tables, and network gateways. Coupa creates an Amazon Virtual Private Cloud on AWS's scalable infrastructure and divides VPC's private IP address range into multiple private subnets. AWS also has physical controls in place to isolate servers within a data center.

Business Continuity Plan: The Coupa Disaster Recovery and Business Continuity Plan is an operational document that is continually monitored and updated to reflect the current business operations. It covers various incident management, crisis management, and disaster recovery scenarios that could result in business disruption. The plan is tested on an ongoing basis as Coupa supports customer production environments on a 24x7 basis. Verification of disaster recovery for hosting is completed monthly and Coupa Operations performs monthly reviews of disaster recovery events that occurred during the month. Complete testing of the plan occurs at least on an annual basis.

All customer data is stored on redundant database servers with live failover, in addition to the physical redundancy (network and power) that Amazon provides. All customer data is stored on RAID class hardware and replicated in real-time to a secondary environment in a different AZ. A MySQL database serves as the source database in the Amazon AZ A and every transaction is continuously replicated to the replica database in AZ B.

If the primary hardware in Availability Zone A fails, Coupa employs the concurrently running hardware in Availability Zone B. The replica database in AZ B is promoted to source and a replica database in AZ C is immediately initiated. The new replica database is continuously synchronized with the new source database.

The replica database is backed up every 60 minutes using Amazon EBS snapshots onto the Amazon S3 service. Coupa utilizes Amazon SSE to encrypt backups. The Amazon S3 service is then replicated throughout the Amazon data centers and are accessible in all Availability Zones within that region. Snapshots are converted into volumes to restore data.

Prohibit Portable Storage: Client Confidential data shall not be copied to CDs, thumb drives, or other portable storage media. Sending, downloading, or uploading Client Confidential Information (encrypted or unencrypted) to a non- organization approved email address, Internet service, or device is prohibited.

Secured Portable Devices: Coupa has implemented endpoint security controls on all user systems. These security controls include full disk encryption, password configuration, antivirus, removable media protection, automated screen locking via screensaver, host based firewall and automatic updates. IT monitors endpoint systems to facilitate security requirements are met and acts on devices that do not meet the expectation. Suspected malicious software or activity on end user devices is to be immediately reported to IT. End user malware/virus protection is automatically updated with the latest security definitions. Coupa has a Mobile Device Management Policy which outlines the appropriate use of mobile devices when using devices for business purposes. Mobile Device Management (MDM) software is required for device that is used for business purposes. Portable systems storing sensitive information must be password protected, utilize two-factor authentication, employ hard disk encryption, and have antivirus software installed and up to date.

Inventory of Devices: Infrastructure assets utilized in the production environment are tracked and inventoried using the management platforms AWS and Azure. These tools allow Coupa to manage, monitor and automate cloud infrastructure tasks or processes. Cloud operations is responsible for the management and up keep of this inventory. MDM records inventory and status of devices e.g., operating system and patch levels, lost or decommissioned, device assignee, etc.



6. Secure Application and Network Access

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6. Secure Application and Network Access

Access to the Solution, Solution infrastructure and Participating Entity systems/networks must employ secure data transmission protocols, including the secure sockets layer (SSL) protocol and public key authentication, signing and encryption. Bidders must identify the encryption and non-repudiation services that will be in place for any remote solution access, such as Secure Multipurpose Internet Mail Extensions (S/MIME) and digital certificates with the provided PKI.

Bidders must identify the secure (e.g., non-clear text and authenticated) standardized network protocols used for the import and export of data and to manage the service, and proposals shall also document the relevant interoperability and portability standards that are involved.

Bidders must identify custom changes made to any hypervisor in use and all solution-specific virtualization hooks available for customer review.

Bidders must describe the security practices in place to secure applications, including threats from outside the service center as well as other customers co-located within the same service center.

Bidders must describe security audit logging in place on information systems, including computers and network devices. Details must include, but are not limited to:

- Logging process including the types of services and devices (e.g. computers, network devices) logged;
- The event types logged; and
- The information fields logged.

Bidders must describe security procedures (background checks, foot printing logging, etc.) which are in place regarding Bidder's employees who have access to sensitive data.

Response requirement:

- RTM: Tab 5, SEC-1 through SEC-6
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Security Application and Network Access objectives and requirements.

Secure Data Transmission: Coupa is focused on ensuring that the highest level of security is maintained. At Coupa, we use secure TLS protocols with a selection of cipher suites to handle all our connections. A cipher suite is a set of algorithms that help secure a network connection that uses Transport Layer Security (TLS) or its now-deprecated predecessor Secure Socket Layer (SSL). Coupa uses SSL certificates from GoDaddy which is a trusted certificate authority. Sensitive data like cXML credentials is encrypted and the keys are stored securely and only accessible to specific operations personnel. Web servers utilize secure sockets layer (SSL) encryption for web communication sessions.

Coupa uses AWS KMS which provides centralized control of encryption keys. AWS KMS presents a single view of all the public key usage. Coupa can then easily create keys, implement key rotation, create usage policies, and enable logging from the AWS Management Console. Coupa also uses a certificate issued by DigiCert with an SHA-256 with RSA Encryption signature algorithm.

Data in transit is encrypted using TLS 1.2 (AES-256) to facilitate intercepted data is not compromised. Data is encrypted before being transferred between the server and the end-user through a web browser, mobile app, or email. Coupa encrypts all communications between customers and the Coupa data center using high-grade encryption (AES-256 bit). Access to the Coupa on-demand applications and services are only available through secure HTTPS sessions and only available with an authenticated credentials. Data import, data export, and service management is conducted over secure protocols (HTTPS and SFTP) which have strong cipher suites enabled.

Secure Network Protocols: Data in transit is encrypted using TLS 1.2 (AES-256) to facilitate intercepted data is not compromised. Data is encrypted before being transferred between the server and the end-user through a web browser, mobile app, or email. FTP connections are encrypted using SFTP utilizing strong ciphers. For user access and RESTful integration, Coupa supports TLS 1.2 with an AES-256 cipher and disallows all previous TLS/SSL. Coupa supports SFTP with PGP-encrypted payloads for file-based integration.

Custom Changes: No mechanism exists for a customer notification identifying custom changes made to hypervisor. Hypervisors and virtualization platform is managed by AWS. Coupa is offering an industry-leading business service and not an infrastructure management solution.

Security Practices: The Coupa infrastructure is protected by state-of-the-art firewalls at the hypervisor, kernel, and application levels, as well as intrusion detection systems across all servers. Coupa resources and data are protected by a multi-layered defense, combining multiple mitigating strategies:

- Single unified platform running on a hardened OS
- Platform monitoring using Prisma Cloud
- Automated vulnerability scanning of source code with Brakeman
- Dedicated Amazon Virtual Cloud (VPC)
- Encrypted communications with customers but also within the VPC
- Strict tiers segregation with Amazon Security Groups
- Inspection of incoming traffic with ModSecurity
- Host-based intrusion detection and file integrity monitoring with OSSEC
- Centralized log management with Elastic Stack
- Penetration tests and application vulnerability assessments with Rapid7
- Continuous penetration testing in a dedicated environment using the services of HackerOne
- Extensive manual testing is performed every two months prior to each scheduled major release, using HackerOne

Security Audit Logging: The security team reviews audit logs daily to identify security events. Audit logs are streamed to remote logging servers with read-only access restricted to authorized personnel. Coupa maintains audit logs for both application events and a full technical log. Coupa logs all system access, physical and logical, with user history under the date and time stamps. The Coupa log management strategy is based on the Elastic Stack. The Elastic Stack combines Logstash, Elasticsearch, and Kibana (ELK). Logstash is a data pipeline that processes logs and other event data from a variety of systems. Logstash allows Coupa to parse data and converge on a common format before inserting the data into the Coupa analytics datastore. Logstash collects the following log categories:

- Application logs (Rail, Nginx, MySQL, etc.)
- Server logs
- Security logs
- IMAP logs

Employee Security Procedures: All Coupa staff are hired as per standard Coupa hiring practices. All Coupa personnel in roles that require access to customer data are subject to a background check as part of the normal Coupa Human Resources hiring practices. Pre-hire screening procedures are performed and include, but are not limited to, I-9 Employee Eligibility Verifications and Background Checks. Criminal background checks and credit checks are performed on employees who touch or have access to customer data. Employees are required to complete security awareness training on an annual basis to understand their obligations and responsibilities to comply with the corporate and business unit security policies. Access control on applications, operating systems, databases, and network devices is configured according to the principle of least privilege



7. Data Security

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7. Data Security

Bidders must demonstrate due diligence to ensure computer and telecommunications systems and services involved in storing, using, or transmitting Participating Entity Data are secure and protect Participating Entity data from unauthorized disclosure, modification, use or destruction.

Bidders must provide details that address the following:

- Describe security practices in place to secure/protect data and applications, including threats from outside the service center as well as other customers co-located within the same service center.
- Describe risk management techniques that balance the need for security measures against the sensitivity of Participating Entity data.
- Describe how it intends to comply with all applicable laws and related to data privacy and security.
- Describe how user accounts or data will not be accessed, except in the course of data center operations, response to service or technical issues, as required by the express terms of the Master Agreement, the applicable Participating Addendum, and/or the applicable Service Level Agreement.
- Describe data confidentiality standards and practices that are in place to ensure data confidentiality. This must include not only prevention of exposure to unauthorized personnel, but also managing and reviewing access that administrators have to stored data. Include information on your hardware policies (laptops, mobile etc.).
- Describe the security measures and standards (e.g. NIST) which the Bidder has in place to secure the confidentiality of data at rest and in transit.
- Describe how it will only use data for purposes defined in the Master Agreement, participating addendum, or related service level agreement. Contractors shall not use the government data or government related data for any other purpose including but not limited to data mining. Bidders, or their subcontractors, shall not resell nor otherwise redistribute information gained from its access to the data received as a result of this RFP.
- Describe the method by which you dispose of data following completion of any contract services

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Data Security objectives and requirements.

Security Practices to Protect Customer Data: Coupa is committed to providing customers with a reliable and secure application allowing spend management from anywhere at any time. Coupa partners with Amazon Web Services to provide the hardware and infrastructure to support the Coupa platform. In addition to data encryption and ensuring the highest level of security for customers, Coupa implements robust network security controls and uses proactive security measures.

The Coupa application infrastructure is protected by state-of-the-art firewalls at the hypervisor, kernel, and application levels, as well as intrusion detection systems across all servers. Coupa resources and data are protected by a multi-layered defense, combining multiple mitigating strategies:

- Single unified platform running on a hardened OS
- Automated vulnerability scanning of source code with Brakeman
- Dedicated Amazon Virtual Cloud (VPC)
- Encrypted communications with customers but also within the VPC
- Strict tiers segregation with Amazon Security Groups
- Inspection of incoming traffic with ModSecurity
- Host-based intrusion detection and file integrity monitoring with OSSEC
- Centralized log management with Elastic Stack

Coupa encrypts all communications between customers and the Coupa data center using high-grade encryption (AES-256 bit). Access to the Coupa on-demand applications and services are only available through secure HTTPS sessions and only available with an authenticated credentials. Passwords are never transmitted or stored in their original form, preventing them from being compromised by third parties.

All passwords are stored as salted one way hashes using SHA-2. Data at rest is stored on both Amazon EBS and S3 volumes. Amazon EBS handles transactional data stored in MySQL databases and Amazon S3 stores attached files. Amazon EBS and S3 encryption use 256-bit Advanced Encryption Standard algorithms (AES-256) and an Amazon-managed key infrastructure. The encryption occurs on the server that hosts the EC2 instance, providing encryption of data-in-transit from the EC2 instance to EBS storage. EBS and S3 encryption use AWS Key Management System (AWS KMS) primary keys when creating encrypted volumes and snapshots created from encrypted volumes.

Risk Management Techniques: Periodic risk assessments are performed for the Coupa platform in order to review the effectiveness of existing information security controls and safeguards, as well as to identify new risks. These assessments shall facilitate that all policies and supporting procedures properly address the environment in light of changing regulatory, contractual, business, technical, and operational requirements. Risk assessments are performed at least annually. Security reviews and vulnerability assessments are performed by information technology personnel and third-party vendors on a periodic basis. Remediation plans are proposed and monitored through resolution. Security monitoring applications and manual reviews are utilized to monitor and analyze the in-scope systems for possible or actual security breaches. Risks that are identified are rated using a risk evaluation process and are formally documented, along with mitigation strategies, for management review. This review includes the evaluation of the likelihood and impact with inherent and residual risk.

Data Privacy Laws: Coupa complies with all applicable laws related to data privacy and security in the countries in which the solution is utilized. Coupa privacy standards align with NIST 800-53 Rev. 4 guidelines, and Coupa is certified to ISO 27001, Type 2 SOC I, and Type 2 SOC II standards. Coupa also offers HIPAA for customers that need it.

Coupa is also GDPR compliant. Coupa is committed to supporting our customers in their compliance activities, including as outlined in GDPR Chapter III (Rights of the data subject), most notably the rights of access and rectification (Art. 15 + 16 GDPR), right to erasure or 'right to be forgotten' (Art. 17 GDPR), right to data portability (Art. 20 GDPR), and right not to be subject to automated decision-making, including profiling (Art. 22 GDPR). For more details, please refer to <https://www.coupa.com/gdpr>.

Access to Customer Data: Coupa employees do not have direct access to production equipment, databases, or customer data, except where necessary for system management, maintenance, and backups.

Access to assets is granted based on a need-to-know and least-privilege principles. Access that has not been explicitly permitted is denied by default. Where feasible, role-based access controls are used to allocate logical access to a specific job function or area of responsibility, rather than to an individual. Physical and logical access control policies are consistent with asset classification policies. Administrative access to operating systems are only granted to the organization's staff and contingent staff whose job roles have been approved for administrative responsibilities. All applications supporting Coupa require authentication and authorization controls to grant access to information or application privileges.

Data Confidentiality: Coupa protects the confidentiality and security of customer information and is committed to the following privacy principles.

- Coupa establishes safeguards to determine the security and confidentiality of customer information.
- Coupa restricts access to customer information to employees where job function requires it. Employees with access to customer information are required to maintain the confidentiality of all customer information.
- Coupa maintains physical, electronic, and procedural safeguards that comply with industry standards to protect customer information.



- Coupa routinely tests information systems and the website to facilitate that unauthorized access does not occur.
- Coupa maintains customer privacy after a customer contract ends. If a customer closes or cancels its account, Coupa continues to follow this privacy policy with respect to the customer information it possesses.

Data at Rest and in Transit Security: The Coupa production environment facilitates encryption of data at rest by utilizing:

- Database column encryption using data key per customer using AES-256-GCM.
- EBS volume encryption enabled on all attached persistent volumes in VPC using AES-256.
- S3 Server Side Encryption on all S3 objects are encrypted with AES-256 key managed by AWS.
- Ephemeral Volume Encryption using LUKS with a 256-bit key.

Data in transit is encrypted using the following methods:

- External connections to the Coupa platform are encrypted using TLS 1.2 utilizing strong ciphers.
- Load Balancer to Application communication is encrypted using TLS 1.2 utilizing strong ciphers.
- Email uses opportunistic STARTTLS for non-HIPAA and mandatory STARTTLS for HIPAA deployments.
- FTP connections are encrypted using SFTP utilizing strong ciphers.
- Application to Database communication is encrypted using AES-256-SHA.

Use of Customer Data: The Lead State and Participating Entities exclusively owns all rights, title and interest in and to all of its data. Data is used in Coupa according to the Data Processing Agreement (DPA) in place. As part of the standard Master Subscription Agreement (MSA), the customer agrees that as part of providing the Hosted Applications, Coupa may collect, use and disclose quantitative data derived from the use of the Hosted Applications for industry analysis, benchmarking, analytics and other business purposes. All data collected, used, and disclosed will be in aggregate form only and will not identify the Lead State and Participating Entities or its Users. The Lead State and Participating Entities may choose not to participate in such aggregation of data, but will not have access to benchmarks and customer community insights in this case.

Disposal of Customer Data: Customers stop using our services by ending or terminating their agreements with us. All Coupa customer data is stored and accessible in the system for the life of the partnership. Coupa does not purge data until after contract termination or expiration. After a termination or expiration, Coupa stores all customer data for 60 days. After 60 days, the data is deleted from the Coupa system. A certificate can be provided to confirm data destruction. In this case, the device or the server itself is not destroyed.

AWS uses the techniques detailed in DoD 5220.22-M ("National Industrial Security Program Operating Manual ") or NIST 800-88 ("Guidelines for Media Sanitization") to destroy data as part of the decommissioning process. If a hardware device is unable to be decommissioned using these procedures, the device will be degaussed or physically destroyed in accordance with industry standard practices.

8. Personally Identifiable Information Protection

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8. Personally Identifiable Information Protection

The Solution must protect Personally Identifiable Information (PII). Proposals must provide details on how PII is protected and compliance with Federal PII, HIPAA and European General Data Protection Regulation (GDPR) requirements including, but not limited to:

- United States Code 42 USC 1320d through 1320d-8 (HIPAA);
- Code of Federal Regulations, 42 CFR 431.300, 431.302, 431.305, 431.306, 435.945, 45 CFR 164.502 (e) and 164.504 (e); and
- IRS Publication 1075, Tax Information Security Guidelines for Federal, Participating Entity and Local Agencies.

Bidders must

- Maintain in confidence any personally identifiable information ("PII") it may obtain, maintain, process, or otherwise receive from or through the Participating Entity;
- Not sell, rent, lease or disclose, or permit its employees, officers, agents, and independent Bidders to sell, rent, lease, or disclose, any such PII to any third party, except as permitted under this Contract or required by applicable law, regulation, or court order;
- Take all commercially reasonable steps to (a) protect the confidentiality of PII received from the Participating Entity and (b) establish and maintain physical, technical and administrative safeguards to prevent unauthorized access by third parties to PII received by Bidders from the Participating Entity;
- Give access to and use of PII only to those individual employees, officers, agents, and independent Bidders who reasonably require access to such information in connection with the performance of Bidder's obligations under an associated Participating Entity agreement;
- Upon request by the Participating Entity, promptly destroy or return to the Participating Entity in a format designated by the Participating Entity all PII received from the Participating Entity;
- Cooperate with any attempt by the Participating Entity to monitor Bidder's compliance with the foregoing obligations as reasonably requested by the Participating Entity from time to time;
- Establish and maintain data security policies and procedures designed to ensure the following:
 - Security and confidentiality of PII;
 - Protection against anticipated threats or hazards to the security or integrity of PII; and
 - Protection against the unauthorized access to, disclosure of or use of PII.

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the PII Protection objectives and requirements.

With the Coupa solution, a minimal amount of personally identifiable information (PII) is processed, managed, or stored in the standard Coupa configuration for individuals and/or users. The physical, technical, and administrative controls established for the Coupa environment protect the individual's information adequately. Coupa does not require much in terms of data elements regarding users. In terms of PII, Coupa stores name, email, phone numbers, an optional photo, country, and business information related to system usage (e.g. default chart of accounts). To protect this information, Coupa relies on state-of-the-art encryption. For customers requiring HIPAA, we do offer a HIPAA-certified solution. Coupa is also compliant with Code of Federation Regulations 42 CFR 431.300, 431.302, 431.305, 431.306, 435.945, 45 CFR 164.502 (e) and 164.504 (e); and IRS Publication 1075 requirements Tax Information Security Guidelines for Federal, Participating Entity and Local Agencies since this level of personal information is not required to be stored in Coupa for the purposes of spend management activities. The Coupa Privacy Policy is adhered to where personal information is being processed.

Coupa is committed to supporting its customers in their compliance activities, including as outlined in GDPR Chapter III (Rights of the data subject), most notably the rights of access and rectification (Art. 15 + 16 GDPR), right to erasure or 'right to be forgotten' (Art. 17 GDPR), right to data portability (Art. 20 GDPR), and right not to be subject to automated decision-making, including profiling (Art. 22 GDPR). For more information, please visit: www.coupa.com/gdpr.

The Coupa Access Control policy specifies that access to all systems, networks, services, and information is forbidden unless expressly permitted to individual users or groups of users. Coupa employees and contractors are only provided access to the network and network services that they have been specifically authorized to use and are required to perform their job duties.

Coupa does not sell, rent, lease or disclose, or permit its employees, officers, agents, and independent Bidders to sell, rent, lease, or disclose, such PII to third party, except as permitted under this Contract or required by applicable law, regulation, or court order.

Upon request, Coupa will make all Participating Entity data available for download in .csv format and/or promptly destroy or return to the Participating Entity in a format designated by the Participating Entity all PII received from the Participating Entity. Upon contract termination, customer data is purged within 60 days and data in backups are purged within twelve months unless otherwise restricted by law. Coupa has adopted an automated teardown to delete a customer instance. For compliance purposes, data is not deleted in the application during the life of the contract.

Coupa will also cooperate with the Participating Entity to monitor compliance. Coupa does expect customers and their users to comply with all applicable laws and regulation in connection with the use of the Coupa platform, in particular making sure, that customers have all rights and consents necessary to allow Coupa to use and process such data. Coupa is also committed to cooperating with any attempt by the Participating Entity to monitor Bidder's compliance with the foregoing obligations as reasonably requested by the Participating Entity from time to time.

Coupa employees do not have direct access to production equipment, databases, or customer data, except where necessary for system management, maintenance, and backups. Access to assets is granted based on need-to-know and least-privilege principles. Administrative access to operating systems is only granted to the organization's staff and contingent staff whose job roles have been approved for administrative responsibilities. All applications supporting Coupa require authentication and authorization controls to grant access to information or application privileges. Segregation of duties is implemented for all sensitive or critical functions in the Coupa environments to minimize the potential of fraud, misuse, or incompetence. Access reviews are performed every quarter to facilitate that access to data was restricted and provided for appropriate segregation of duties. No parties outside Coupa have access to customer data unless required by law.

9. Security/Privacy Issue Occurrence

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9. Security/Privacy Issue Occurrence

In the occurrence of any security or privacy issue with the provided Solution and/or Services, whether detected by the Participating Entity, a Participating Entity auditor or the Contractor, the Contractor must:

- Notify the Participating Entity of the issue or acknowledge receipt of the issue within two (2) hours;
- Within forty-eight (48) hours from the initial detection or communication of the issue from the Participating Entity, present a potential exposure or issue assessment document to the Participating Entity Account Representative and the Participating Entity Chief Information Security Officer with a high-level assessment as to resolution actions and a plan;
- within four (4) calendar days, and upon direction from the Participating Entity, implement to the extent commercially reasonable measures to minimize the Participating Entity's exposure to security or privacy until such time as the issue is resolved; and
- upon approval from the Participating Entity implement a permanent repair to the identified issue at the Bidder's cost.

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Security/Privacy Issue Occurrence objectives and requirements.

Coupa has a documented Incident Response Plan which outlines the policies and procedures to be taken in the event of a security or privacy incident. Coupa's incident response plan is tested on an annual basis with tabletop exercise and training in incident response procedures. The Coupa incident response plan includes communication channels for personnel and business partners to report incidents that adhere to applicable legal, statutory, or regulatory compliance obligations.

Within 24 hours, customers would be notified of the detection of a security or privacy issue. Without the ability to predict scope or complexity of given issue, Coupa is not able to commit to a two-hour window to notify the Participating Entity, a 48-hour window to present a potential exposure or issue assessment document, nor a four-calendar day window to implement a resolution. Coupa would determine the best approach to implement solutions and repairs at its own cost but approval by the Participating Entity is not guaranteed. As a SaaS vendor, Coupa proactively rolls out updates and bug fixes to the entire customer base.

Unless notification is restricted by law, Coupa shall report to customer's support contacts designated in Coupa's customer support portal ("Support Portal") unauthorized acquisition, access, use, disclosure, or destruction of Customer Data ("Breach") promptly without undue delay after Coupa determines that a Breach has occurred.

Unless prohibited by law, Coupa shall share information about the nature of the Breach that is reasonably requested by the customer to enable the customer to notify affected individuals, government agencies and/or credit bureaus. Customers have sole control over the content of customer data that it enters into the Coupa Platform and is responsible for determining whether to notify impacted individuals and the applicable regulatory bodies or enforcement commissions and for providing such notice.

If there is unauthorized breach of security, we will notify our customers within 24 hours of breach. Coupa protects its application infrastructure by using state-of-the-art firewalls at the hypervisor, kernel, and application levels, as well as intrusion detection systems across all servers. We contract with third-party security firms and consultants to conduct vulnerability threat assessments including penetration tests. Coupa's anomaly detection system instantly notifies operations staff, 24/7, if anything unusual is detected. Coupa will proactively notify customers of security breaches via email and if necessary, confirm by phone.

Customers will be notified of incidents that compromise the confidentiality of their data. The Coupa Management Oversight Group authorizes these types of notification. General Counsel will work with the Technical Response Team to prepare a summary statement should there be a need to notify customers that confidential data has been lost. To the extent that it is appropriate, the statement should address the following points:

- Describe what happened
- Disclose when the incident happened
- Explains why the incident occurred
- Inform the customer about what Coupa is doing to facilitate that it will not happen again



10. PII Data Actual/Attempted Access or Disclosure

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10. PII Data Actual/Attempted Access or Disclosure

If the security or privacy issue is determined to be an actual, attempted or suspected theft of, accidental disclosure of, loss of, or inability to account for any PII by Contractor or any of its sub-contractors (collectively “Disclosure”) and/or any unauthorized intrusions into Contractor’s or any of its sub-contractor’s facilities or secure systems (collectively “Intrusion”), Contractor must additionally:

- Notify the Participating Entity within two (2) hours of the Bidder becoming aware that the issue was of the unauthorized Disclosure or Intrusion;
- Investigate and determine if an Intrusion and/or Disclosure has occurred;
- Fully cooperate with the Participating Entity in estimating the effect of the Disclosure and/or Intrusion’s effect on the Participating Entity and fully cooperate to mitigate the consequences of the Disclosure or Intrusion;
- Make a report to the Participating Entity including details of the Disclosure and/or Intrusion and specify the corrective action to be taken;
- Take corrective action to prevent further Disclosure and/or Intrusion; and
- In the case of a Disclosure, cooperate fully with the Participating Entity to notify the effected persons as to the fact of and the circumstances of the Disclosure of the PII. Additionally, Bidder must cooperate fully with all government regulatory agencies and/or law enforcement agencies having jurisdiction to investigate a Disclosure and/or any known or suspected criminal activity.

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the PII Data Actual/Attempted Access or Disclosure objectives and requirements.

As described in the previous section, Coupa has a documented Incident Response Plan which outlines the policies and procedures to be taken in the event of personally identifiable information (PII) data actual or attempted access or disclosure. Coupa's incident response plan is tested on an annual basis with tabletop exercise and training in incident response procedures. The Coupa incident response plan includes communication channels for personnel and business partners to report incidents that adhere to applicable legal, statutory, or regulatory compliance obligations. If there is unauthorized breach of security, we will notify our customers within 24 hours of breach. Coupa is not able to commit to a two-hour window to notify the Participating Entity without first fully understanding the breach.

Unless notification is restricted by law, Coupa shall report to customer’s support contacts designated in Coupa’s customer support portal (“Support Portal”) unauthorized acquisition, access, use, disclosure, or destruction of Customer Data (“Breach”) promptly without undue delay after Coupa determines that a Breach has occurred. Unless prohibited by law, Coupa shall share information about the nature of the Breach that is reasonably requested by the customer to enable the customer to notify affected individuals, government agencies and/or credit bureaus. Customers have sole control over the content of customer data that it enters into the Coupa Platform and is responsible for determining whether to notify impacted individuals and the applicable regulatory bodies or enforcement commissions and for providing such notice.

A breach is the acquisition, access, use, or disclosure of Protected Health Information or personal data in a manner not permitted under HIPAA or GDPR, which compromises the security or privacy of the protected health information and/or personal data. GDPR requires that in the case of a personal data breach, the customer or supervisory authority be notified without undue delay and where feasible, no later than 72 hours after becoming aware of it.

Coupa will send a breach notification letter to all affected individuals if it is determined that breach notification is required. Coupa has the discretion to provide notification following an impermissible use or disclosure of PHI or personal data without performing a risk assessment if determined by General Counsel. Notice to affected individuals will be written in plain language and the notification letter must contain the following information:

- A brief description of what happened, including the date of the breach and the date of the discovery of the breach, if known.
- A description of the types of unsecured protected health information or personal data that were involved in the breach (such as whether full name, social security number, date of birth, home address, account number, diagnosis, disability code, or other types of information were involved), the approximate number of data subjects concerned and the categories and approximate number of personal data records concerned.
- The name and contact details of the data protection officer.
- Steps the individuals should take to protect themselves from potential harm resulting from the breach.
- A brief description of what Coupa is doing to investigate the breach, to mitigate harm to individuals, and to protect against further breaches.

Contact procedures for individuals to ask questions or learn additional information, which includes a toll-free telephone number, email address, website, or postal address.

Coupa will cooperate fully with all government regulatory agencies and/or law enforcement agencies having jurisdiction to investigate a Disclosure and/or any known or suspected criminal activity.

11. Security Breach Reporting

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11. Security Breach Reporting

If the security issue is determined to be an actual security breach that may have compromised Participating Entity Data that is not PII, the Contractor must additionally:

- Notify the Participating Entity within two (2) hours of the Contractor becoming aware of the breach. In the case of a suspected breach, the Contractor must notify the Participating Entity in writing of the suspected breach within twenty-four (24) hours of the Bidder becoming aware of the suspected breach.
- Fully cooperate with the Participating Entity to mitigate the consequences of such a breach/suspected breach. This includes any use or disclosure of the Participating Entity Data that is inconsistent with the terms of this Contract and of which the Contractor becomes aware, including but not limited to, any discovery of a use or disclosure that is not consistent with this Contract by an employee, agent, or sub-contractor of the Contractor.
- Give the Participating Entity full access to the details of the breach/suspected breach and assist the Participating Entity in making any notifications to potentially affected people and organizations that the Participating Entity deems are necessary or appropriate. Bidders must document all such incidents/suspected incidents, including its response to them, and make that documentation available to the Participating Entity on request.

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Security Breach Reporting objectives and requirements.

As described in the previous section, Coupa has a documented Incident Response Plan which outlines the policies and procedures to be taken in the event of a security or privacy incident. Coupa's incident response plan is tested on an annual basis with tabletop exercise and training in incident response procedures. The Coupa incident response plan includes communication channels for personnel and business partners to report incidents that adhere to applicable legal, statutory, or regulatory compliance obligations.

Within 24 hours, customers would be notified electronically of the detection of a security of a security breach. Without the ability to predict scope or complexity of given issue, Coupa is not able to commit to a two-hour window to notify the Participating Entity. Coupa will cooperate with the Participating Entity to alleviate harmful effects of a breach, including the use or disclosure of customer data that is inconsistent with the master subscription agreement. Upon investigation of a breach, Coupa would provide the Participating Entity with a detailed overview including affected regions, data subjects, modules, etc. This information could then be used by the Participating Entity in making notifications to potentially affected people and organizations. Coupa maintains

full documentation of all incidents, responses, and resolution. Due to the sensitive nature of these Incident Reports, they may not be shared with customers.

Unless notification is restricted by law, Coupa shall report to customer's support contacts designated in Coupa's customer support portal ("Support Portal") unauthorized acquisition, access, use, disclosure, or destruction of Customer Data ("Breach") promptly without undue delay after Coupa determines that a Breach has occurred. Unless prohibited by law, Coupa shall share information about the nature of the Breach that is reasonably requested by the customer to enable the customer to notify affected individuals, government agencies and/or credit bureaus. Customers have sole control over the content of customer data that it enters into the Coupa Platform and is responsible for determining whether to notify impacted individuals and the applicable regulatory bodies or enforcement commissions and for providing such notice.

If there is unauthorized breach of security, we will notify our customers within 24 hours of breach. Coupa protects its application infrastructure by using state-of-the-art firewalls at the hypervisor, kernel, and application levels, as well as intrusion detection systems across all servers. We contract with third-party security firms and consultants to conduct vulnerability threat assessments including penetration tests. Coupa's anomaly detection system instantly notifies operations staff, 24/7, if anything unusual is detected. Coupa will proactively notify customers of security breaches via email and if necessary, confirm by phone.

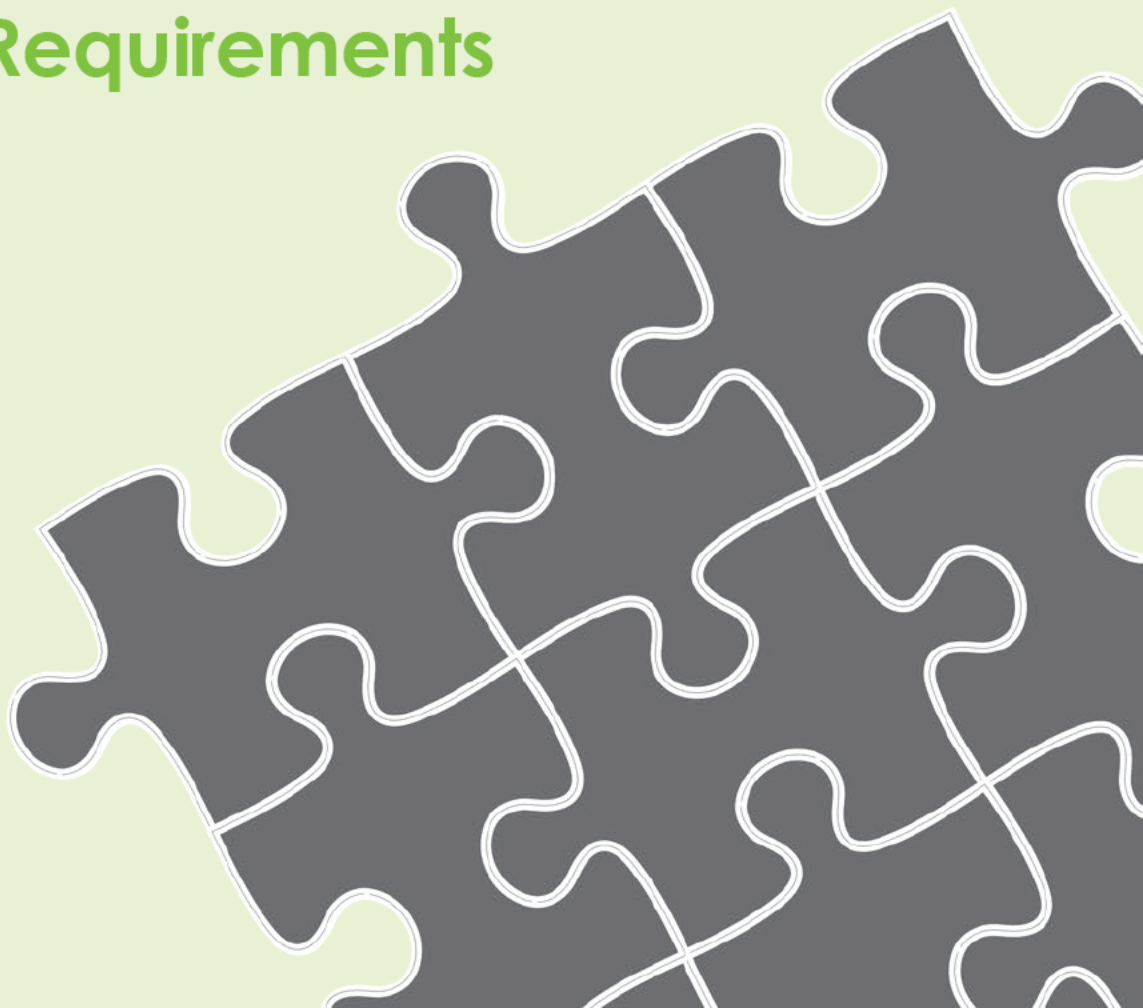
Coupa maintains a process to record or log all breaches of PHI/ personal data, regardless of the number of data subjects affected. The following information should be collected for each breach:

- A description of what happened, including the date of the breach, the date of the discovery of the breach, and the number of patients or data subjects affected, if known.
- A description of the types of unsecured protected health information or personal data that were involved in the breach (such as full name, social security number, date of birth, home address, account number, other).
- A description of the action taken with regard to notification of patients/ data subjects regarding the breach.

Steps taken to mitigate the breach and prevent future occurrences.



E. Implementation Requirements





E. Implementation Requirements

1. Project Management

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1. Project Management

Bidders must describe their project management methodology and approach including, but not limited to, key tasks, status reporting, implementation plan development, deliverable management, status reporting, risk assessment/mitigation, issue management, and staff management. Proposals must also address:

- Providing a dedicated Project Manager and identify the skills, qualifications, certifications and responsibilities of an individual that would be assigned to a Solution implementation project.
- Include an example Implementation Plan that includes project phases, tasks, major milestones and timeline.
- Typical Project Deliverables
- Bidder's staffing plan including key positions, roles and responsibilities
- Participating Entity required staff, roles, skills required and responsibilities.
- Project Governance model/approach depicting both Bidder's and Participating Entity roles.

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Project Management objectives and requirements.

Project Management and Project Manager Candidate

One of the key factors to a successful technology implementation of this scale is effective project management (PMO) across all stakeholders, not just IT. Through our numerous global Coupa implementations, we have honed our world-class PMO approach to what works best for our clients. This includes our data-driven approach to managing project milestones and providing teams with easy access to the latest information. We share this data through early and frequent touchpoints with business stakeholders that will be impacted by design decisions and roll-out plans.

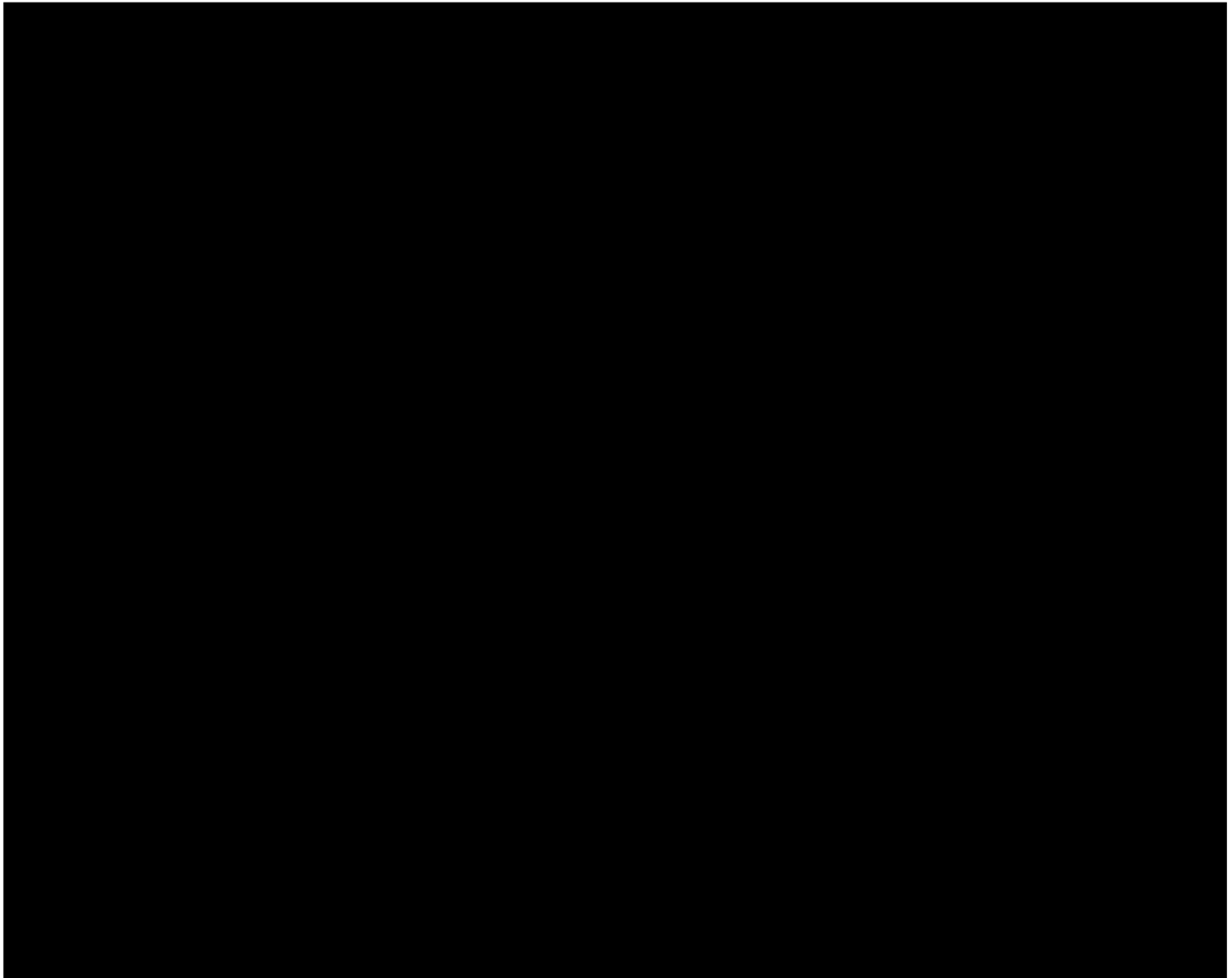
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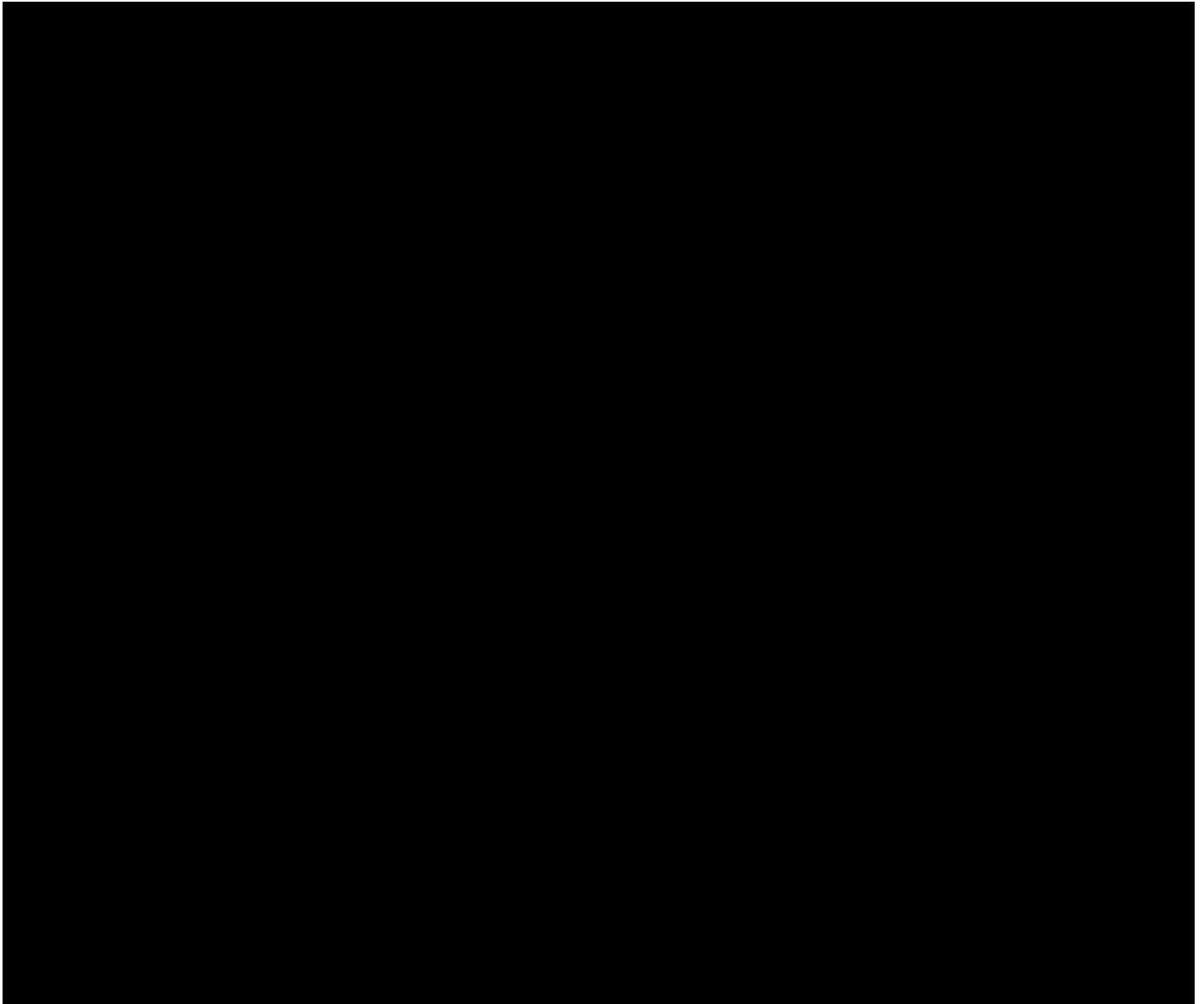
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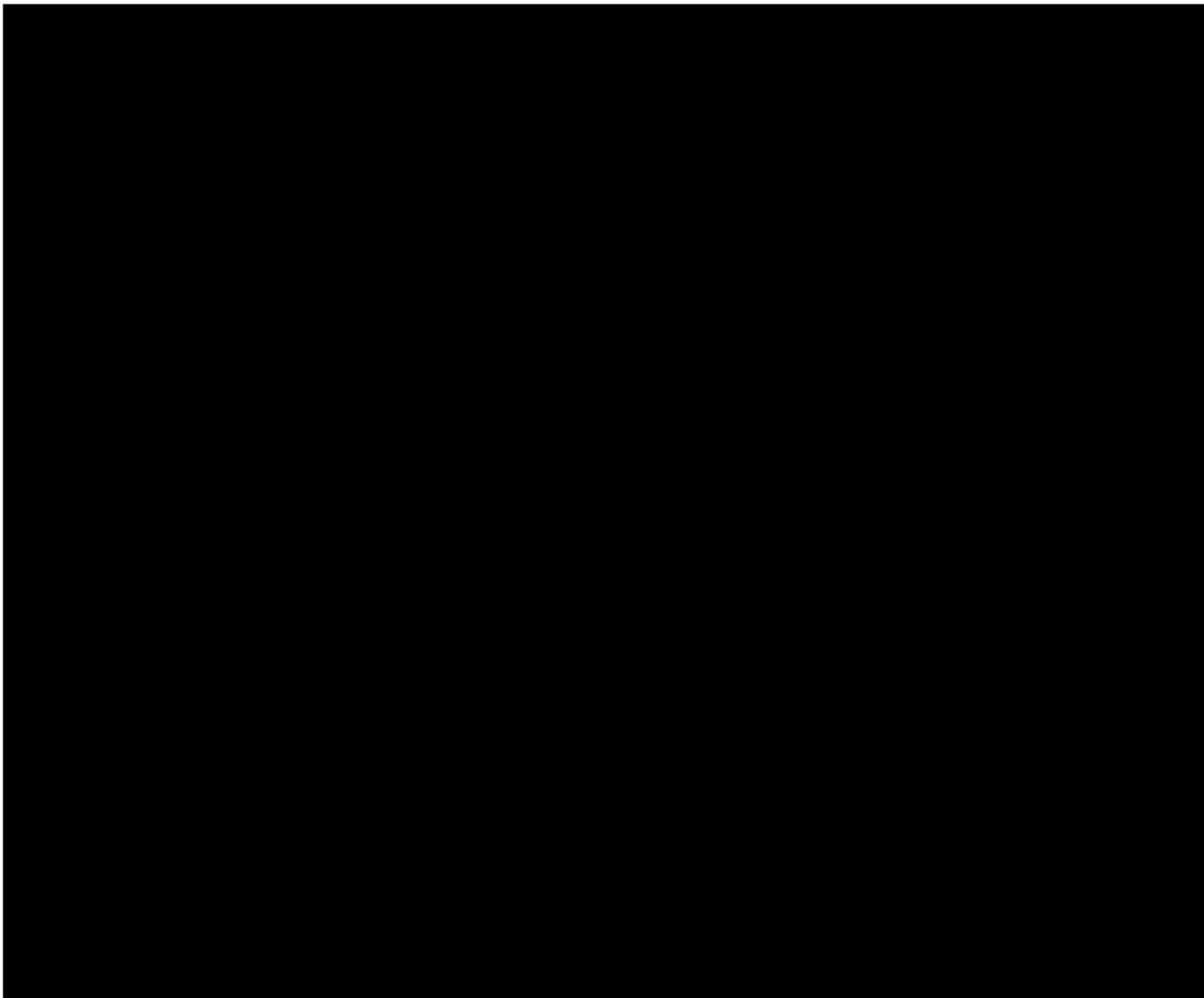


Implementation Plan

The following high-level timeline has been developed based on Deloitte’s implementation methodology. To maximize the speed to value, Deloitte proposed the “in parallel” implementation approach which includes most of the in-scope workstreams starting at the same time and being implemented in parallel. This plan will require additional validation with the Lead State or Participating Entities to confirm if the timeline is achievable, as well as the resource commitment and other planning constraints which may impact the overall project timeline. There is also a notable difference among the implementation timeline for small, medium and large states. The Figure 18 depicted below demonstrates 3 distinctive implementation plans pertaining to small, medium and large state implementations.







Typical Project Deliverables

The Figure 19 below provides a list of typical project deliverables. Please refer to our response to the subsequent question – Project Implementation Methodology for detailed project phase breakdown and proposed project deliverables.

Phases	Deliverables
Project Prep	• Project Kick-off Deck • Detailed Project Plan • Project Deliverables and RAID (Risks, Actions, Issues, and Decisions) Log
Design	• Detailed Design Documents
Build	• User Conference Room Pilot (CRP) Sessions • Test Plan
Test	• Fully Configured and Operational Service Documentation • Testing Output



Phases	Deliverables
Deploy & Hypercare	- Completed Project Deliverables - Go-live Platform - Hypercare Services - Transition Plan to Managed Services

Figure 19. Example Project Deliverable List.

Project Staffing Plan

Understanding the Lead State and Participating Entities’ need to implement a comprehensive and best-in-class eProcurement solution that to improve the effectiveness of administering the end to end source to pay business processes, Deloitte is committed to assembling a high-performing team consisting of executive sponsor, program manager, workstream leads with supporting staff who are ready to support on the first day. Our proposed team brings a depth of experience helping public sector clients reform your financial management practices, modernize eProcurement solutions, strengthen your reporting and analytical capabilities, and deliver success for your most important transformation initiatives.

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Proposed Solutions and/or Services Section III Page 100



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Governance Approach

Deloitte organizes our teams around an effective governance and staffing model, incorporating leadership and advisors that will bring industry experience for the Lead State and Participating Entities and help inform and direct the overall project and workstream implementation. Our team of highly experienced and skilled practitioners align functional business processes and change management with the technology to drive user adoption and value.

[REDACTED]
[REDACTED]
[REDACTED]

[REDACTED]

Status Reporting Powered by Data-Driven Insights

To deliver personalized change experiences and enable adoptions, we will leverage our advanced analytics capabilities to generate real-time, actionable insights that continuously inform and enhance the design, development, and delivery of communication, behavioral, and training throughout the implementation. Our approach allows the Lead State and Participating Entities to utilize actionable and data-driven insights to evaluate progress throughout the different stages of implementation. Each stage of the implementation will have tailored and specific status reports that align to the overall goals of the project as well as the necessary steps for each stage to be considered successful. [REDACTED]



[Redacted]

[Redacted]

[Redacted]

2. Project Implementation Methodology

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2. Project Implementation Methodology

Bidders must describe their implementation methodology and approach including, but not limited to:

- Standard implementation including, but not limited to, approach, strategy, methodology, and change control;
- Design/Configure/Build work required to set up the Solution
- System development methodology;
 - Testing methodology including, but not limited to, Test Plans, Development Testing, Unit Testing, Performance Testing, Integration Testing, User Acceptance Testing, and Test Scenario/Script development.
 - Configuration/change control methodology.
- Risk Management practices and identify common project risks; and
- Issue Tracking/Management.

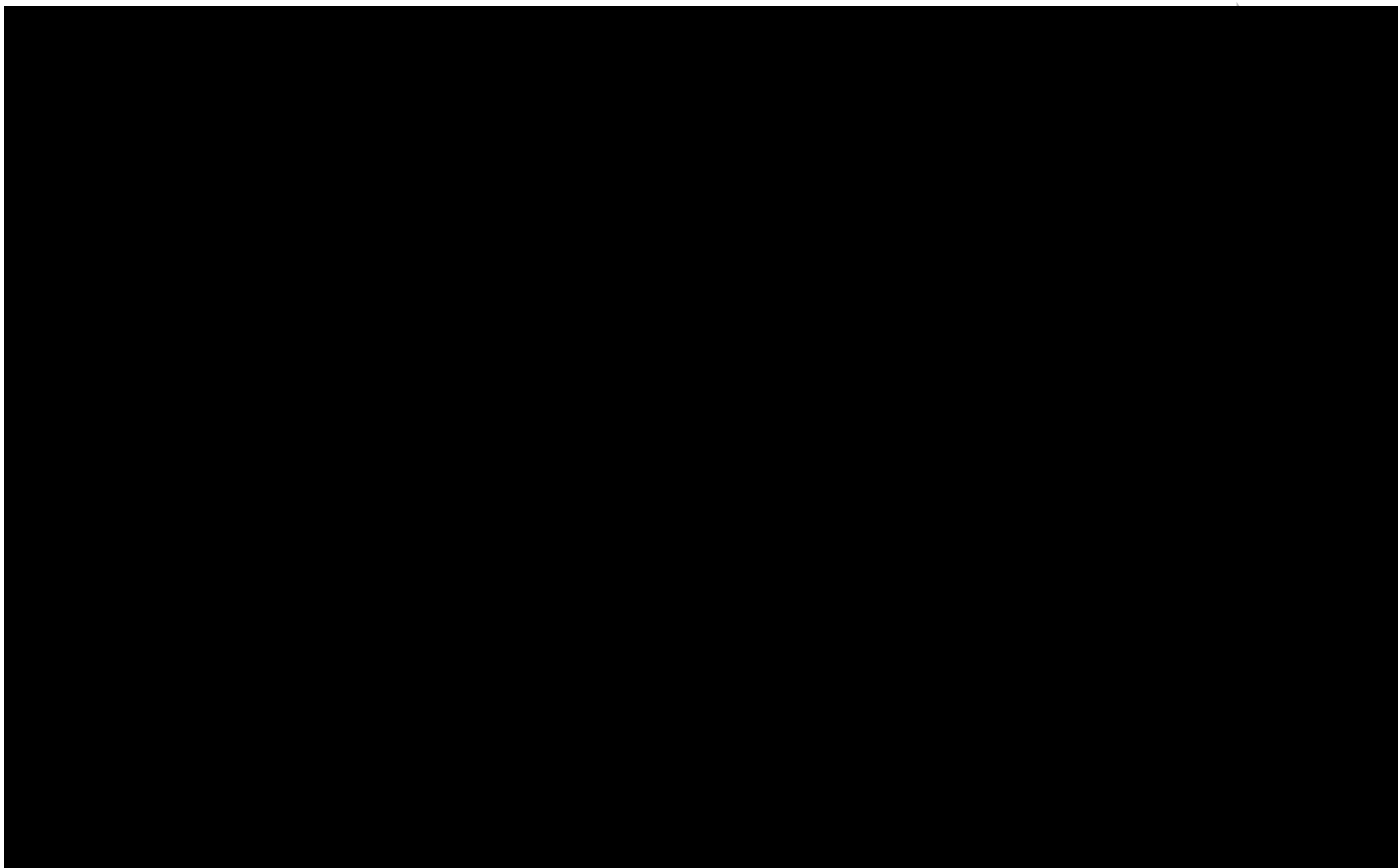
Response requirement:

- RTM: N/A
 - Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Project Implementation objectives and requirements.
-

Deloitte's Coupa Implementation Methodology framework is a **hybrid agile approach** designed to deliver an application and processes that help Lead State and Participating Entities realize its commitment. Our proven methods, as illustrated below, will support the following:

- Leveraging both **business and technical capabilities** to streamline business activities by improving the overall service delivery.
- **Automating activities** like data migration, configuration, testing, and coding migrations
- **Simplifying essential business activities** that span across business units and simultaneously, **enhancing efficiencies** with a range of digital activities and utilizing use-cases created by previous implementations across industries.

The below Figure 25 outlines the five stages of our proposed implementation approach with anticipated activities outlined for each service



Project Prep

[REDACTED] Deloitte will onboard project team members and kick off the project.

[REDACTED]
[REDACTED]
[REDACTED]

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[REDACTED]	

Design

[REDACTED] we will develop an integrated design in Coupa. The functional team will identify required configuration and custom objects. A functional design document will be developed during the design phase to document, analyze, and validate functional and non-functional requirements. The data cleansing approach will be defined, and cleansing activities should begin during the design phase. Security profiles and roles are also defined during this phase.

[REDACTED]

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4. Data Conversion Services

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4. Data Conversion Services (separate from the Data Services response in the Functional Requirements section)

Bidders must provide data conversion services to transition from existing, legacy systems to the new eProcurement Solution. Proposals must describe in detail the available services including, but not limited to, the following:

- Conversion needs assessment;
- Conversion approach/methodology for Supplier data, Users, and active transactions including, but not limited to, open Purchase Orders, active Solicitations, and active Contracts;
- Data cleansing; and
- Tools/accelerators available to support data conversion.

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Data Conversion Services objectives and requirements.

Coupa's highly flexible open architecture allows for seamless migration of data from the legacy system into the new solution. The conversion and migration of existing data, including suppliers, users, and active purchase orders, solicitations, and contracts, will be accomplished using Coupa's bulk load options and kept up-to-date with pre-configured toolsets (e.g., Intermediate Documents [IDocs] for SAP data), Representational State Transfer (REST) API calls, or flat-file integrations via Secure File Transfer Protocol (sFTP).

Data migration processes begin with requirements gathering sessions to perform a conversion needs assessment. This assessment identifies the scope of each data object that must be converted, the volume of such conversions, and the expected function of the converted objects in the new system. Coupa implementations regularly convert thousands of records of each object type, including contracts and suppliers' records. Coupa is able to accommodate many hundreds of thousands of Supplier records and an unlimited number of contract records; the system can excellently manage the Lead State and Participating Entities' 50,000 supplier records and 300 contracts.

These requirements drive our development of a conversion strategy, determining which Coupa objects each converted object will become in the new system and the method of their entry into and maintenance within the system. For low-volume conversions such as those the Lead State and Participating Entities appears to anticipate, our team would develop a data conversion strategy to map the data attributes of the in-scope records to Coupa objects, cleanse the records to increase integrity of the data, develop transformation rules to convert the legacy attributes to the Coupa environment design, and execute that transformation.

[Redacted content]



5. Interface/Integration Development Services

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5. Interface/Integration Development Services (separate from the Interface and Integration response in the Functional Requirements section))

Bidders must provide services to develop and implement interfaces and/or integrations with Participating Entity legacy systems. Proposals must describe in detail the available services, including but not limited to, the following:

- Provide technical assessment to identify all required interface and integrations to systems outside of the eProcurement Solution.
- Design, development, testing and implementation of all identified interfaces and integrations.

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Interface/Integration Development Services objectives and requirements.

Coupa is highly flexible with an open architecture that allows users to integrate virtually third-party systems on the market. Coupa's proposed solution is able to integrate with a variety of software applications – from financial and ERP applications, to HR and Inventory Management systems. Our proposed solution has APIs that can connect directly into existing tools. Additionally, Coupa allows data to be extracted in flat files via the User Interface, Web services, or sFTP server, allowing integration providers to make seamless connections between Coupa and the other systems. Deloitte has extensive experience in integrating with complex systems, and we will recommend leading practices, based on the Lead State and Participating Entities' environment and integration points.

[Redacted]

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- Deloitte 2021

- Near-real time export of transactional data to an ERP or inventory management system is achievable through the use of Coupa's Open API schema and API integrations. By leveraging these resources, these systems can rapidly receive encumbrance and inventory data from Coupa. During our design workshops, our integrations lead will capture your requirements and recommend how this data can be integrated with your financial systems, then prepare and configure the Coupa environment to deliver that data in accordance with the decided design.

Coupa is able to support integration with Organizational Change Management Services such as WalkMe to provide users with clear instruction of the new solution.

Many Coupa customers choose to make use of Remote Approvers: API Integrations that deliver transactional data to an external system for validation and intake an approval or rejection into Coupa. During the design phase, the integration lead will assess the requirements presented and determine whether to recommend use of Remote Approver functionality.

6. Organizational Change Management (OCM) Services

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6. Organizational Change Management (OCM) Services

Bidders must provide OCM services that include, at a minimum:

- OCM Strategy development;
- Stakeholder Analysis/Assessment;
- Readiness Assessments, Organizational and Staff;
- Impact Assessment;
- Communications Plan development;
- Coaching Plan development;
- Resistance Assessment and Management Plan development; and

Proposals must include a description of Bidders OCM Methodology and detailed descriptions of each of the above items.

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the OCM Services objectives and requirements.

Organizational Change management

In our experience, projects struggle when organizations do not recognize the challenges associated with transformations and the real impact on employees. A comprehensive Organizational Change Management (OCM) program that includes a strategy, coupled with an execution plan focusing on the employee's experience, will be critical for success. Our OCM puts employee experience and adoption at the center of change activities and uses measurement to track progress and adjust change activities accordingly. We will design a change management strategy that addresses needs across functions [REDACTED]

[REDACTED] This customized approach enables the Lead State and Participating Entities to shape the change experience of each critical stakeholder group in

SECTION HIGHLIGHTS



[illegible]

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Bidders must provide user training on the use the eProcurement Solution. Proposals must include:

- Response requirement:

Coupa and Deloitte's resources have extensive experience in developing unique training suites for each individual customer and conducting the trainings. [REDACTED]

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Coupa Web-Based Training

- eLearning is a Web-based, self-study resource
- Provides access to on-demand WBT modules and certification exams
- Courses delivered via voice-directed video, webinars, and interactive training
- PDF documents for each module are available for quick reference materials

Coupa Online Help

- Comprehensive knowledgebase provides action-specific guidance based on the user's current location within the application

Coupa Community Forum

- Primary portal for discussion with Coupa Employees, Customers, and Partners
- Structured as a collaborative community forum

[REDACTED]

Coupa Module	Course Method	Training Course	Training Course Details	Recommended Audience	Duration
Coupa Platform	4-day instructor-led course	Coupa Platform	The essential foundational concepts necessary to understand and take advantage of the possible configurations that the Coupa platform offers.	project team, procurement team, IT department, system administrators, system implementation managers, and power users (buyers, accounts payable, and contract administrators)	4 Days
Coupa Tour	E-Learning	Coupa Tour	The view through your end users' eyes	Basic User and Approver	45 min
User Configuration	E-Learning	User Configuration	- Understanding standard roles - Building custom roles around common use cases - Managing content group relationships between objects	users, system administrators	To Be Discussed With Lead State or Participating Entities
Data Elements Configuration	E-Learning	Data Elements Configuration	- Setting up commodity structures - Configuring global settings in Company Information - Loading and managing master data	users, system administrators	To Be Discussed With Lead State or Participating Entities
Custom Fields	E-Learning	Custom Fields	Setting up and managing custom fields on data and transaction tables	users, system administrators	20 mins
Financial Setup	E-Learning	Financial Setup	- Building a sample chart of accounts (COA) - Creating user-viewable budgets - Managing billing account security rules	Finance Department, Procurement team	To Be Discussed With Lead State or Participating Entities
Suppliers	E-Learning	Suppliers	- Creating supplier records - Using the Coupa Supplier Portal (CSP) as a supplier	contract administrators	30 mins
Contracts and Items	E-Learning	Contracts and Items	- Managing hosted items - Setting goals and reporting with Coupa Contracts - Creating pricing tiers of hosted items	contract administrators	1 hr
Approval Chains	E-Learning	Approval Chains	Understanding how to utilize approvals workflow to - streamline processes through hierarchy approvals, - basic approval chains, and dynamic approval chains	project team, procurement department, IT department	2 hr 15 min
Buying and Buyer Action	E-Learning	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	Buyers	15 min
Questionnaires and Web Forms	E-Learning	Questionnaires and Web Forms	- Using questionnaires to drive getting additional information - Using web forms to try business processes and service purchases	users, administrators	15 min

Figure 36. Example Training Plan.



8. Help Desk Services

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8. Help Desk Services

Bidders must provide services to support users and Suppliers in the use of the eProcurement solution. Proposals must describe in detail the available services, including but not limited to, the following:

- Approach/methodology;
- Experience supporting eProcurement solutions;
- Support/Management Plan that addresses:
 - Help Desk location and staffing
 - Participating Entity responsibilities and staffing recommendations
 - Operating procedures
- Systems and tools utilized to provide services including phone, chat and ticketing systems;
- Performance metrics tracking and reporting;
- Issue analysis, tracking, and reporting;
- Customer satisfaction tracking and reporting; and
- Option/approach to transition to a Participating Entity Help Desk operation including training of Participating Entities Help Desk resources.

Response requirement:

- RTM: Tab 6, IMPL-1 through IMPL-5
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Help Desk Services objectives and requirements.

Approach/Methodology

Coupa meets all of the requirements as set forth in RTM: Tab 6, IMPL-1 through IMPL-5.

Coupa is unwaveringly committed to ensuring extraordinary customer success. The Coupa Customer Success team is comprised of experienced professionals dedicated to ensuring that customers meet their business spend management goals, and they get the most out of the investment in Coupa. Coupa customers all have the comfort of knowing that a highly trained customer success agent is available to help with questions or issues as part of the subscription to Coupa.

“Premium Support” is available through the premium support plan, which includes: 24x7 severity 1-4 support cases, accelerated response targets, accelerated updates, and 10 designated support contacts.

The Support Account Management option, an add-on, includes a designated support account manager, assigned support engineer team access, escalations management, support review meetings, and release management.

About Coupa's Support Features

Designated Support Contacts: Your designated support contacts are authorized to submit cases and work directly with Coupa’s support experts toward case resolution. You can set up Coupa certified users to be designated contacts in the Coupa Support Portal.

24x7 Availability Monitoring: Rest assured that we’re always monitoring the Coupa platform to facilitate maximum availability and performance. We’ll alert you to issues that may require your attention.

24x7 Success Portal Access: Access the Coupa Success Portal at <https://success.coupa.com> for links to online product documentation, the Coupa Knowledge Articles, the Coupa Community Forum, and more.

24x7 Coupa Community Forum Access: The Coupa Community Forum is an online resource for customers and partners to share ideas, expertise, and best practices with each other and with Coupa.

24x7 Support Portal Access: Designated Support Contacts can access the online Support Portal anytime to submit support requests, review case status, and browse other support resources.

24x7 Technical Support: Your Coupa Support team is ready to assist you 24 hours per day, 7 days per week, and will respond within our Service Level Response targets to help diagnose, troubleshoot, and resolve technical problems related to the Coupa platform.

Web Case Submission: Create your support cases directly in the Coupa Support Portal and your request will be routed to the best resources to help with resolution.

Phone Support: Coupa Premium Support customers can submit cases of any severity level via telephone at any time.

Supplier Support Chat: Suppliers, whether logged in to the Coupa Supplier Portal (CSP) or not, can get help from Coupa Support also through chat.

Experience of Coupa Support: The Support team is a multicultural and diverse team located in 4 main offices in Pittsburgh (US), Reno (US), Dublin (EMEA) and Pune (APAC). Support is comprised of individuals with technical backgrounds in Computer Science, SaaS, Procurement, etc., and many have extensive experience implementing complex systems for supporting direct/in-direct procurement. Coupa support representatives have a strong understanding of web technologies, integrations, and ERP systems such as Oracle, Netsuite, Microsoft Dynamics, SAP, Workday, etc., and proficient with SQL and fundamental relational database concepts. The support team is structured into Product Verticals, each of them including different components. Every engineer has a combination of both technical and procurement knowledge and is both specialized in the components of the assigned vertical and cross-skilled into the others. On top of each vertical, Coupa has a Vertical Lead taking care of the team and working with more senior engineers (Level 3 or Advanced) to facilitate it stays on top of everything. Every member of the Support team is platform certified and is re-certified with every new release of the software. Every team member is HIPAA and PCI DSS compliant as part of their annual compliance certification.

Help Desk Location: Coupa Support is a multicultural and diverse team located in 4 main offices in Pittsburgh (US), Reno (US), Dublin (EMEA), and Pune (APAC). The Support team provides remote support to global clients via phone, email, customer portal, and supplier chat. The Coupa Support team offers 24x7 coverage with weekend on-call policies, follow-the-sun, and escalation processes.

Lead State and Participating Entities Responsibilities and Staffing Recommendations: Customers are allowed up to ten designated support contacts to interact with the Coupa Customer Success team. Coupa recommends customers own Level 1 support and Level 2 support, where Level 1 support is the customer organization's Help Desk for end-users, and Level 2 support is the customer organization's staff trained as Coupa System Administrators.

Given that Coupa is a 100% SaaS, multi-tenant model with 100% self-service administration, most employee questions are resolved fully prior to going to Level 3 support. To enable more successful customers prior to level 3 support Coupa has enabled Ask an Expert capability as a direct way to connect its growing community bringing together customer users, partner experts, and internal Coupa subject matter experts. Coupa's Ask an Expert feature gives users the ability to ask a question and leverage the collective.



Operating Procedures:

Systems and Tools: Coupa provides customers four options for pursuing support:

- Requests logged via the Coupa Support Portal
- Email
- Phone
- Chat (Supplier Support Chat)

Support is available to customer designated Coupa administrators and support technicians are available 24x7, weekend on-call policies, follow-the-sun, escalation processes and all tickets can be tracked online.

Performance Metrics Tracking: Upon creating a ticket, customers receive a system-generated email acknowledgment providing a ticket number. The Technical Support team prioritizes tickets according to severity levels and to service plan and works in stage to resolve all issues. Performance Metric Tracking is in place to monitor response times from ticket initiation to first response and resolution. A survey is also sent at the closure of each ticket.

Coupa Support measures the following key metrics:

- Service Level Targets
- Backlog
- Response Time
- Closure Time

Coupa reviews the metrics on a monthly basis at an organizational level, not at a customer level.

Issue Analysis and Tracking: Support tickets can be tracked through Coupa's online support portal. Incoming tickets are then prioritized by the Coupa team according to Severity Level:

- Severity 1 – Severe production error that results in Coupa being completely unavailable and halting transactions, with no workaround.
- Severity 2 – Serious error that results in a major function of Coupa suffering a reproducible problem, causing either major inconvenience to users or consistent failure in common functionality.
- Severity 3 – Error that results in common functionality experiencing an intermittent problem or a consistent failure in less common functionality.
- Severity 4 – Service Request or Question. This includes sandbox refresh, SSO setup, etc.

After analyzing the issue, the Coupa Technical Support engineers:

- Attempt to recreate the issue
- Analyze the reproducible test cases provided
- Check if the issue is a service limitation that may lead to an enhancement request

- Open requests with Coupa Development for defects with reproducible test cases that are isolated to the Coupa service
- Provide instruction and reference documentation, if the reported issue is due to user error or a misunderstanding.

Once the Technical Support engineer investigates the issue, a solution is provided. Customers should test the solution to confirm the issue is resolved. When there is mutual agreement that the issue is resolved, the Engineer closes the ticket. If the issue is not resolved to customer satisfaction, they should provide the Technical Support engineer with detail related to the area(s) they feel are not resolved, for further investigation or explanation.

Customer Satisfaction Tracking: Coupa is unwaveringly committed to ensuring not just satisfaction, but extraordinary customer success. The Coupa Customer Success team is comprised of experienced professionals dedicated to ensuring that customers meet their business spend management goals and get the most out of their investment in Coupa.

As Coupa was born in the cloud, it brings everything together in a single platform. This has enabled a holistic design approach to Customer Success, with every module looking and feeling the same. Enabling high adoption rates, which means customers get all spend under management. Additionally, the Coupa power applications for everything from strategic sourcing to spend analysis is unifying business processes.

Coupa has achieved 94%+ renewal rates and leading analysts agree with its customers that Coupa is a named Leader. Named a Leader again in the 2020 Gartner Magic Quadrant for Procure-to-pay suites. Coupa was placed furthest for completeness of vision and highest for ability to execute in the Leaders Quadrant.

While renewal rates and add on licenses are good indicators of value and customer satisfaction, more importantly, Coupa measures Customer Success through the Coupa Customer Value as a Service Model (Value Optimization). Upon becoming a Coupa customer, a snapshot is taken of the existing spend metrics. Another snapshot is taken after go-live to facilitate the achievement of savings objectives that were identified. Coupa's model is to continue to engage customer teams after go-live through continuous value optimization by looking for opportunities to drive more value from the Coupa solutions.

Coupa drives long term customer success in its Value as a Service model. First, during the value discovery phase to help facilitate best practice based on its experience with over 2,000+ business spend management customers. Second, Coupa's benchmarking within its cross-industry segment allows customers to know how successful procurement efforts are. Third, and most importantly, the true subscription model fully aligns with Coupa's interest in customer success. Coupa is very focused on customers and their success.

Option to Transition to Customer Help Desk: Coupa prides itself on a stellar reputation of premier customer service ratings as validated by independent analysts such as Gartner, IDC, Forrester, and Spend Matters. Customers are happy to focus on reaching their business value goals instead of handling Help Desk operations. While customers do handle end-user issues internally, Coupa will be responsible for working with designated Lead State and Participating Entities administrators to drive success.

Coupa recommends that the Participating Entity own Level 1 support and Level 2 support, where Level 1 support is the customer organization's Help Desk for end-users, and Level 2 support is the customer organization's staff trained as Coupa System Administrators.

Given that Coupa is a 100% SaaS, multi-tenant model with 100% self-service administration, most employee questions are resolved fully prior to going to Level 3 support. To enable more successful customers prior to level 3 support Coupa has enabled Ask an Expert capability as a direct way to connect its growing community bringing together customer users, partner experts, and internal Coupa subject matter experts. Coupa's Ask an Expert feature gives users the ability to ask a question and leverage the collective.

9. On-Site System Stabilization Support

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9. On-Site System Stabilization Support

Bidders must provide personnel to support a stabilization period of 3 months after the 'go live' of the full Solution Implementation. Participating Entities may require this support to be on-site. These personnel will address, at a minimum, system setup/configuration changes, issue assessment/resolution, system performance and stability monitoring/adjustment, system use assessment, mentoring of State operations staff, coordination of Contractor off-site tasks and support resources, coordinate documentation.

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the On-Site System Stabilization Support objectives and requirements.

Once the system is in production, on-site system stabilization support, [REDACTED] is provided through hypercare which serves to provide support for end users, closing out the project, and continue to transition responsibilities to Managed Services to sustain, evolve, and optimize the solution with future enhancements.

[REDACTED] The production support team quickly assesses issues to determine full impact and root cause and proposes remedies or other interim solutions as necessary.



This 90-day Hypercare period provides time to stabilize while the Deloitte team still takes an active role in the management of the platform. This stabilization period includes running integrations, event support, and contract execution support. The primary activities may include the following:

- **Support:** Hypercare provides concentrated and expanded support during the initial stabilization period immediately following go-live. The key support areas will include system setup/configuration changes, issue assessment/resolution.
- **Sustain:** Transition to a self-sustaining steady-state support model and brought to life incrementally throughout the project. The key sustain areas will include system performance and stability monitoring/adjustment, system use assessment, mentoring of the Lead State and Participating Entities' operations staff, coordination of Deloitte's off-site tasks and support resources, coordinate documentation.
- **Optimize:** Optimizes to realize benefits. The Deloitte team will prepare you to transition to managed services to oversee future feature releases in the cloud environment.

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F. Managed Services Requirements



F. Managed Services Requirements

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F. Managed Services Requirements

Bidders may propose to provide any of the following services separate from services proposed in the Implementation section of this RFP

1. Solution Support

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1. Solution Support

Bidders must provide post-implementation operational support services including, at a minimum, the following:

- Maintain the performance, availability and stability of the Solution. The Contractor must schedule its implementation of changes so as not to unreasonably interrupt State business operations.
- Make no changes that would materially alter the functionality of the systems used to provide the Services or materially degrade the performance or SLAs as established of the Services, without first obtaining State approval. In the case of an emergency, and in keeping with State security policies in effect, the Contractor may make temporary changes at any time and without State approval, to the extent such changes are necessary, in the Contractor's judgment,
 - (i) to maintain the continuity of the Services,
 - (ii) to correct an event or occurrence that would substantially prevent, hinder or delay the operation of State critical business functions; and
 - (iii) to prevent damage to the Contractor's network. The Contractor will promptly notify the State of all such temporary changes.At the conclusion of the emergency the Contractor will restore any changes to the pre-emergency state, and if the change is deemed necessary for normal operation of the system, a corresponding change request must be initiated for State review and approval. The Contractor must review and perform a root-cause analysis of any deviation from any scheduled or failed changes.
- Prior to using any software or equipment to provide the Services perform all necessary testing to verify that the item has been properly installed, is operating substantially in conformance to its specifications, and is performing its intended functions in a reliable manner in keeping with the defined Service Levels in effect at the time of the change.
- Reasonably accommodate the Participating Entity testing, review and approval processes prior to promoting these Solution components in the production environment.
- For all Production and Non-Production environments (including environments that support systems development, testing, training, demo, QA and otherwise) monitor those environments, apply patches, and administer the system logs.
- Upon the creation of any environment for Participating Entity use, (unless excused in writing by the State) include these environments in regularly scheduled backup, maintenance, update/upgrade, patching, monitoring/reporting functions prior to productive use by the Participating Entity and until the use of this environment is no longer required by the Participating Entity.
- Identify to the Participating Entity any issues that may adversely impact the Participating Entity in-scope environment and operational requirements and that require analysis of the technical components of the system, including the applications, databases, ancillary and systems software and hardware.
- Conduct reviews with the Participating Entity for corrections to performance, functional, integration or technical issues with in-scope environments or operations and incorporate resulting changes into ongoing continuous improvement initiatives.
- Provide reviews of Participating Entity use of the Solution to make recommendations/suggestions on how the Entity could make more effective use of the Solution.
- Perform technical activities including but not limited to: system code/object migrations, patch implementations, testing, performance tuning, log administration, data copies and exports, integrations and scheduled reporting/ETLs, and responsibility for issue resolution such that migrations into production will be executed at agreed periodic intervals and other production changes will be scheduled during the maintenance window. The Contractor must follow a mutually agreed, formalized and published methodology for migrations into production.
- Application and system software/hardware upgrades for in-scope services must not impair the Contractor's ability to meet the Service Levels.
- Maintain an e-mail listing for each business and service owner of the eProcurement solution including third party Solution components. When there is an unscheduled outage or reduction in required performance of the eProcurement solution, the Contractor must promptly notify the appropriate business and service owner contacts of an outage and restoration of service in accordance with the Run Book or other supporting documents.
- Monitor system use/capacity, forecast capacity and review the Participating Entity growth plans during quarterly service review meetings, and if requested due to an unforeseen requirement, participate in the required number of ad-hoc reviews coinciding with these new requirements and infrastructure needs to correctly plan for capacity – periodic capacity increases as well as burst requirements.
- Monitor all third-party software vendors and vendor services for proactive notification of all applicable patches and updates. When new eProcurement impacting items are released, they must be tested by the Contractor in its protected test environments, and jointly scheduled with the Participating Entity for installation during the next scheduled maintenance window. A priority update window may be required in advance of schedule if a patch or fix is deemed to be critical or security related.
- Manage the security functions related to the solution including administrative access and passwords and the related security controls to maintain the integrity of the solution, based on the Contractor's standard security processes.

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Solution Support objectives and requirements.

Performance Maintenance: Coupa offers a hosted, cloud platform and manages the system infrastructure for all customers. Coupa's standard uptime SLA is 99.8% system availability. Coupa's system scalability helps facilitate it meets the SLA on availability. Coupa uses automated scale-based load, which means the system can expand a contract based on the number of users or calculations occurring. Coupa runs billions of transactions and billions of dollars in spend through its system and has been shown to have a 99.999% uptime availability, in part because of the Amazon Web Services features and also because of the design of the product.

Coupa monitors application performance on a continuous basis to maintain the performance and the stability of the application. Coupa also has the ability to automatically scale the application vertically and horizontally in reaction to volume spikes that might impact performance. Coupa employs real-time performance monitoring tools to track availability, response time, and database query load.

Depending on where the customer data is hosted, Coupa has local maintenance windows that can last up to three hours for major releases and maintenance updates. Coupa does not use this window for all bi-weekly maintenance updates. If the window is used, it generally lasts 30 minutes or less and is always within the three-hour window. If there is no expected downtime, daily updates to the sandbox and production instances can occur at any time. Daily updates address critical issues that impact most Coupa customers. Though rare, it is in the best interest of the customer to release these updates as soon as possible. Considering that a daily update is smaller than a maintenance update, there is no risk to the production instance. Both the sandbox and production instances are updated at the same time.

Changes to Alter Functionality: Coupa operates the solution according to the Master Subscription Agreement. No changes would be made to alter functionality without the expressed permission of the Lead State and Participating Entities. Customers agree that Coupa may communicate and follow instructions to make changes to Customer Data and/or Customer's instances, with its Designated Support Contacts via email, phone or through the Support Portal. If emergency changes need to be made for any reason, Coupa would do so without customer permissions. At the conclusion of the emergency Coupa will restore changes to the pre-emergency state. If changes need to be made permanent, Coupa would do so with the customer's best interest and would not be able to commit to State review and approval first. Issues requiring a change to functionality would undergo a root cause analysis first to determine the best resolution.

Testing of Updates: Coupa performs QA testing for application changes prior to implementation. Coupa has a set of test scripts the QA team runs through every release. In addition, Coupa has a number of automated unit tests and selenium scripts that automate the testing of critical features. A third-party vendor is used to perform QA application functionality testing for major releases. Coupa's VP of Services Delivery approves application changes prior to implementation. Coupa also performs automated infrastructure testing and manual application vulnerability testing on each major Enterprise release prior to production deployment.

Customer Testing of Updates: As with software solutions, it's important that you are part of the change management process of new releases and updates. Many customers have their own internal audit requirements for verifying Coupa updates. For customers that need assistance with this, we do offer release update services through our partners, services team, and our Customer Adoption Manager (CAM) team.

Coupa will notify customers of the new release and when these will be updated to their sandbox and production instances. Since our release schedule is fixed, customers can start planning for these dates several months in advance. Customers should run through their common business flows in their sandbox environment to familiarize themselves with new features and to verify that there are no changes to their business workflow. We don't

anticipate changes, but occasionally, a custom role or some other configuration may need to be adjusted as part of the major release.

[REDACTED]

Patch Management and Monitoring: Coupa is a SaaS-based solution and Coupa will be responsible for patching/upgrading the servers and the application. Coupa follows numerous vulnerability tracking sites such as CERT. When a patch for a known vulnerability becomes available or is crafted by Coupa it is immediately evaluated by our operations engineers so that the patch can be safely and methodically applied in our environment. The vulnerability is evaluated for severity and specific impact to our infrastructure. Based on this grading the patch will be scheduled for delivery into our production environment.

Maintenance of Environments: Coupa customers receive both a sandbox and a production environment for the life of the partnership, where both environments are maintained and seamlessly upgraded by Coupa Cloud Operations. Implementation and integration testing are performed in the sandbox environment. Functional data, including users, suppliers, catalogs, and other configured areas are transferred from the test site to the live environment. Test transactions, like requisitions, purchase orders, and invoices are not moved into the live environment. Customers are encouraged to test new functionality in their sandbox environments. Separate environments are maintained for the nonproduction and production operations at Coupa.

Identification of Issues: During Coupa's continuous testing process, issues or bugs may come to light and need to be communicated to customers. Coupa has policies and procedures in place to report, triage and remedy reported bugs and security vulnerabilities. Customers would be made aware of flaws in the solution that would adversely impact environmental and operational requirements. This also applies to the technical components of the system to include the application, databases, ancillary and systems software and hardware.

Coupa contracts with third-party security firms and consultants to conduct vulnerability threat assessments including penetration tests. Coupa's intrusion detection system instantly notifies operations staff, 24/7, if anything unusual is detected.

Corrective Actions: Management meetings are held on an as-needed basis to discuss incidents and corrective measures to facilitate that incidents are resolved. The Information Security team gathers relevant data from multiple sources, analyzes potential threats, and creates individual action plans based on severity. The Customer Value Manager may work with the Lead State and Participating Entities to communicate corrections to performance, functional, integration, or technical issues. Continuous improvement is at the heart of a long-term partnership.

Best Practices and Recommendations: Industry suggestions are delivered through Coupa's highly qualified team of support professionals. The Coupa Success team has three main teams that rally around customers.

1. Customer Adoption Managers – Customer Adoption Managers (CAMs) have advanced product knowledge and industry experience to make sure customers implementing industry best practices. CAMs have advanced product knowledge and industry experience to make sure customers are implementing industry best practices. Here are some examples of what the CAM team has helped clients within the past:

- Increased User Adoption. Elevate and accelerate user adoption with support and guidance from an expert who knows the customer's business goals and environment
 - Maximize Value. Exceed success metrics and review new feature releases to get the most value from Coupa innovations
 - Best Practices. Assess your usage against best practices and industry benchmarks to optimize adoption levels
2. Customer Value Managers – The CVMs work with customers to make sure they're meeting the success criteria for the Coupa implementation.
 3. Technical Support – Coupa's support team works with customers to make sure technical issues are solved quickly.

Technical Activities: Coupa performs all technical tasks related to solution updates and ongoing system availability, including system code migrations, patch implementations, testing, performance tuning, log administration, data copies and exports, and responsibility for issue resolution. System integrations and scheduled reporting/ETLs will be set up during implementation and then maintained by the customer. For migrations into production, Coupa will release new functionality during pre-determined maintenance window that is formalized and publicized with customers. All issue resolution around this process is managed by Coupa. Increasingly, releases can be accomplished without downtime. However, Coupa has local maintenance windows that can last up to three hours for major releases and maintenance updates. Coupa does not use this window for all bi-weekly maintenance updates. If the window is used, it generally lasts 30 minutes or less and is always within the three-hour window. If there is no expected downtime, daily updates to the sandbox and production instances can occur at any time. Daily updates address critical issues that impact most Coupa customers.

Application Upgrades: Coupa currently provides new releases of its products up to 3 times a year at no additional cost. Customers automatically receive upgrades and enhancements when they are generally released, for no additional cost. This model allows for configuration and eliminates the need for reapplying configurations with each upgrade. New releases are designed and made available to customers in such a way as to not disrupt existing operations.

Business Owner Communication: In the event of service outage, real time failover will take place and customer will most likely not even notice. If a disaster has taken out the entire AWS region or if AWS has had an outage on the infrastructure level, details are communicated to the customer in a timely fashion. Coupa's Incident Response Plan includes a complete list of stakeholders who would need to be alerted of disruptions to the delivery of the solution. This list includes responsibilities and contact information with e-mail listing for each individual/role.

Capacity Planning: Coupa uses automated scale-based load in which we are able to handle future capacity needs of our customers. Procedures are established by the site reliability engineering team within the Platforms team for managing Availability, latency, performance, efficiency, and capacity planning for the components within the production environment, as well as manage emergency infrastructure and application changes like critical updates, security hotfixes. The dedicated Customer Value Manager will engage through quarterly business reviews to confirm business goals, performance metrics, and agree on capacity roadmaps to enable the continued value as a service model.

Coupa employs real-time performance monitoring tools to track availability, response time, and database query load as related to regulatory and contractual needs. To help facilitate high performance and availability, Coupa uses an enterprise monitoring application to monitor product servers and databases for operational statistics that



include, but are not limited to Apache web server, CPU usage, Network, and Disk space. The enterprise monitoring application is configured to send alert notifications to IT personnel when predefined thresholds are exceeded on monitored devices.

Third Party Software Patches: Patches are managed by Coupa, as part of its SaaS offering. Coupa monitors patch releases and applies patches to production server operating systems on a periodic basis. Patches are first tested in a protected test environment before they are applied to production. All operating systems are maintained at each vendor's recommended patch levels for security and are hardened by disabling or removing unnecessary users, open ports, and processes. Coupa reserves a weekly maintenance window for bug fixes and patches where updates are automatically released to all customer instances without the need for them to be installed by the Participating Entity. Coupa Security & Compliance oversees the vulnerability management program. The Security Operations Center (SOC) is responsible for monitoring application and system vulnerabilities. Scanning is conducted on the network, hosts, and application at least quarterly. Severity and prioritization of vulnerabilities is determined using CSVV, OWASP and NIST.

Application Security Functions: The Lead State and Participating Entities' administrator will manage user provisioning, setting up password policies, and be responsible for issuing new accounts to users and suppliers. Each new user will have a Welcome message emailed to him or her. The email will include a hyperlink for the user to access and create an initial password to access Coupa. Thereafter, users can change their passwords anytime when logged into the application.

Your system administrator(s) would be centrally responsible for user account provisioning (e.g. username, password policies, account activation/deactivation, security roles, permissions, etc.) and managing user profile data (e.g. name, email, title, phone, address, department, default locale, default currency, default account, content groups, P-cards, etc.). You can provision users through the setup interface of the Coupa application, or via API and flat file integrations.

2. Organizational Change Management (OCM) Services

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2. Organizational Change Management (OCM) Services

Proposals must identify the specific eProcurement solutions that are supported for the OCM services. Proposals must meet the same requirements identified in the Implementation OCM Services in Section E., 6. above.

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the OCM Services objectives and requirements





3. Training Services

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3. Training Services

Proposals must identify the specific eProcurement solutions that are supported for the training services. Proposals must meet the same requirements identified in the Implementation Training Services in Section E., 7. above.

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Training Services objectives and requirements.

[Redacted]

[Redacted]

Deloitte would welcome a discussion with the Lead State or Participating Entities to define and develop a training and continuous improvement plan tailored for the managed services phase.

4. Catalog Support Services

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4. Catalog Support Services

Proposals must identify the specific eProcurement solutions that are supported for the Catalog Support services. Proposals must meet the same requirements identified in the Implementation Catalog Support Services in Section E., 3. above.

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Catalog Support Services objectives and requirements.

[Redacted]

[Redacted]

5. Help Desk Services

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5. Help Desk Services

Proposals must identify the specific eProcurement solutions that are supported for the Help Desk services. Proposals must meet the same requirements identified in the Implementation Help Desk Services in Section E., 7. above.

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Help Desk Services objectives and requirements.

[Redacted]

[Redacted]



6. Transition Out Assistance Services

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6. Transition Out Assistance Services

Bidders must, at the Participating Entity' request, provide services to facilitate the orderly transition to a new service provider. Transition Out Assistance services would commence as follows:

- No less than one (1) year prior to expiration of this Participating Entity agreement or on such earlier date as the Participating Entity may request; or
- Upon notice of Participating Entity agreement termination/partial termination; or
- Upon notice of non-renewal of the Participating Entity agreement.
- Upon commencement, Transition Out Assistance services will continue for a period of up to six (6) months.

Proposals must include the following:

- Aid, cooperation, and information as is reasonably necessary to help enable a smooth transition of the applicable services to the Participating Entity or its designated service provider.
- Provide information as the Participating Entity may reasonably request relating to the number and function of each of the Contractor personnel performing the services.
- Transfer Participating Entity-owned data, information, deliverables, work products (WP), documentation, etc.
- Identify any dependencies on the new service provider necessary for the Contractor to perform the transition out assistance services.
- Assist the Participating Entity in the identification of significant potential risk factors relating to the transition.
- Assist the Participating Entity in designing plans and contingencies to help mitigate identified risks.
- Submit a transition plan, for approval by the Participating Entity, which includes a timeline for successfully completing the transition out assistance services.
- Provide a schedule and plan for Contractor's return to the Participating Entity of (i) the Participating Entity service locations then occupied by Contractor (if any), and (ii) the Participating Entity confidential information, the Participating Entity data, documents, records, files, tapes and disks in Contractor's possession.

Response requirement:

- RTM: N/A
- Inline Narrative: Bidders must provide a detailed narrative response that describes meeting the Transition Out Assistance Services objectives and requirements.

Deloitte uses elements of our proven multi-phase Transition-Out plan which focuses on the transfer of knowledge, roles, and responsibilities to key personnel, system support, and technical infrastructure to execute successful transitions for large scale implementations. We maintain a mission-first focus and support the incoming contractor personnel for a seamless transition.

[Redacted text block]

[Redacted text block]

[Redacted text block]

[Redacted text block]

[Redacted text block]

TRANSITION SERVICES CLIENT EXPERIENCE

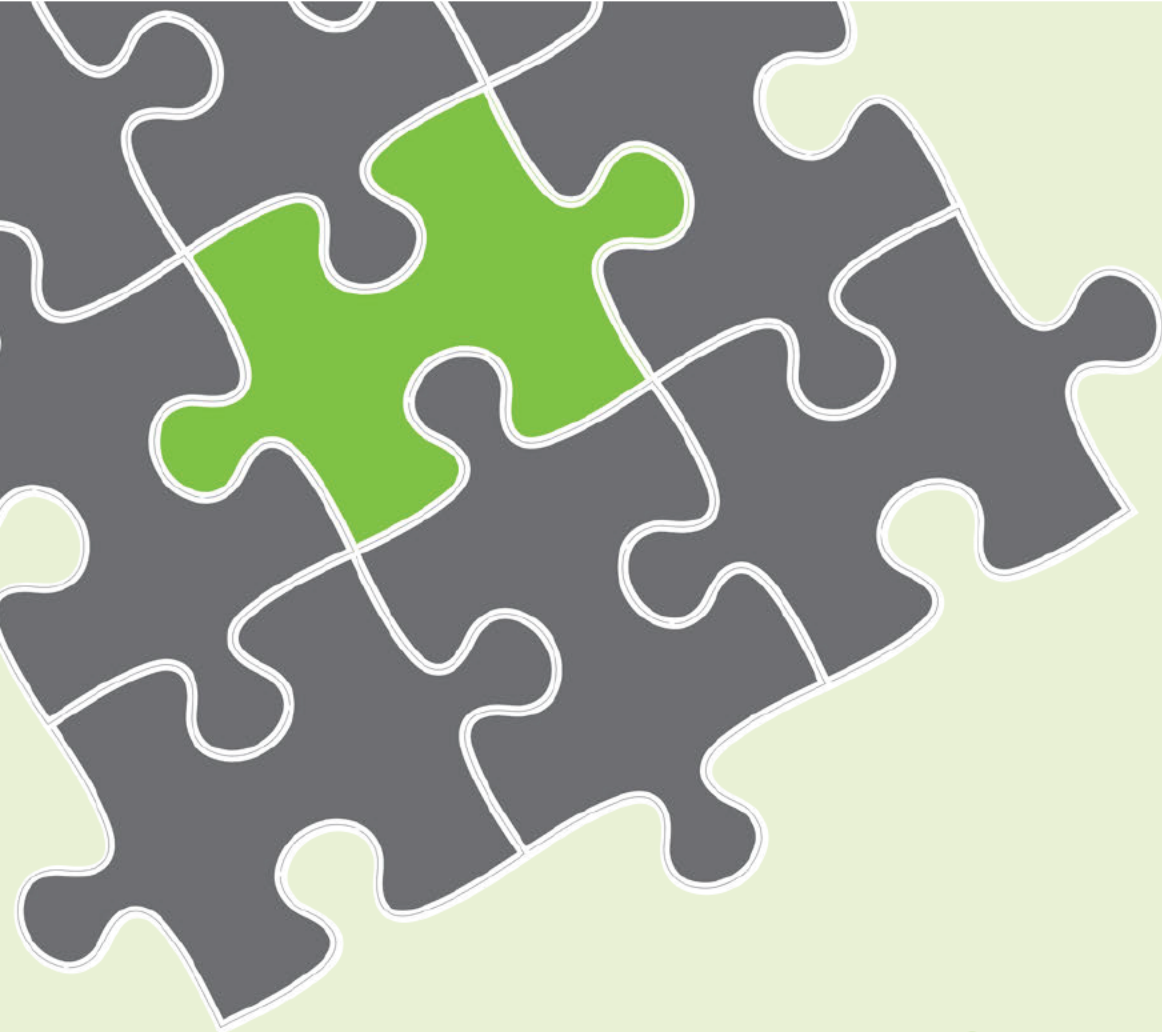


[Redacted text block]

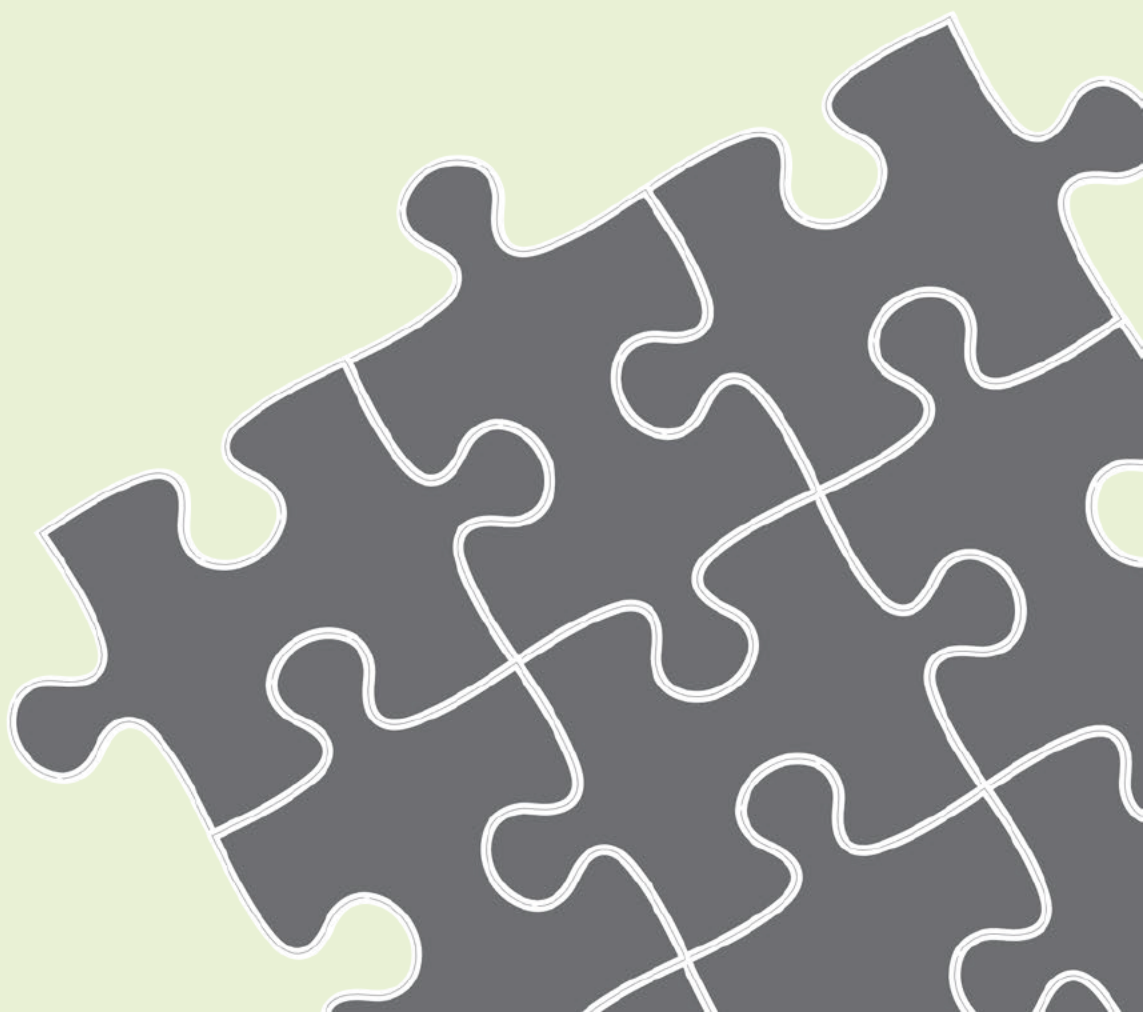
[REDACTED]

- TRANSITION SERVICES
TOOLS AND ACCELERATOR**

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]



G. Other Available Services





G. Other Available Services

RFP 202102021: Part II – Scope of Services to be Provided, G. Other Available Services, Page No. 41

G. Other Available Services

Bidders are to identify and provide details on any additional services that will be available to Participating Entities.

Response requirement: OPTIONAL

- RTM: Tab 7, MNGD-1
- Inline Narrative: If responding to this section, Bidders must provide a detailed narrative response that describes any other available Services. Bidders must indicate if any of the additional services are at an additional cost and identify those in the cost workbook (reference "Innov, Value-Adds, Addl Svc" Tab).

1. Application Management Services (AMS)

We understand the need to provide accessibility to support services through a wide variety of access channels.

[Redacted text block]

[Redacted text block]

[Redacted text block]

[Redacted text block]

[Redacted text block]

[Redacted text block]

[Redacted text block]

2. Help Desk Services

A user-friendly, effective service desk has a direct and positive impact on user satisfaction, confidence and compliance. Deloitte has considerable experience in establishing and maintaining service desk systems to support end-users after the implementation of large-scale technology systems. Users have the support they need to resolve a problem or question in areas including system log-on, navigation and functionality.

[REDACTED]

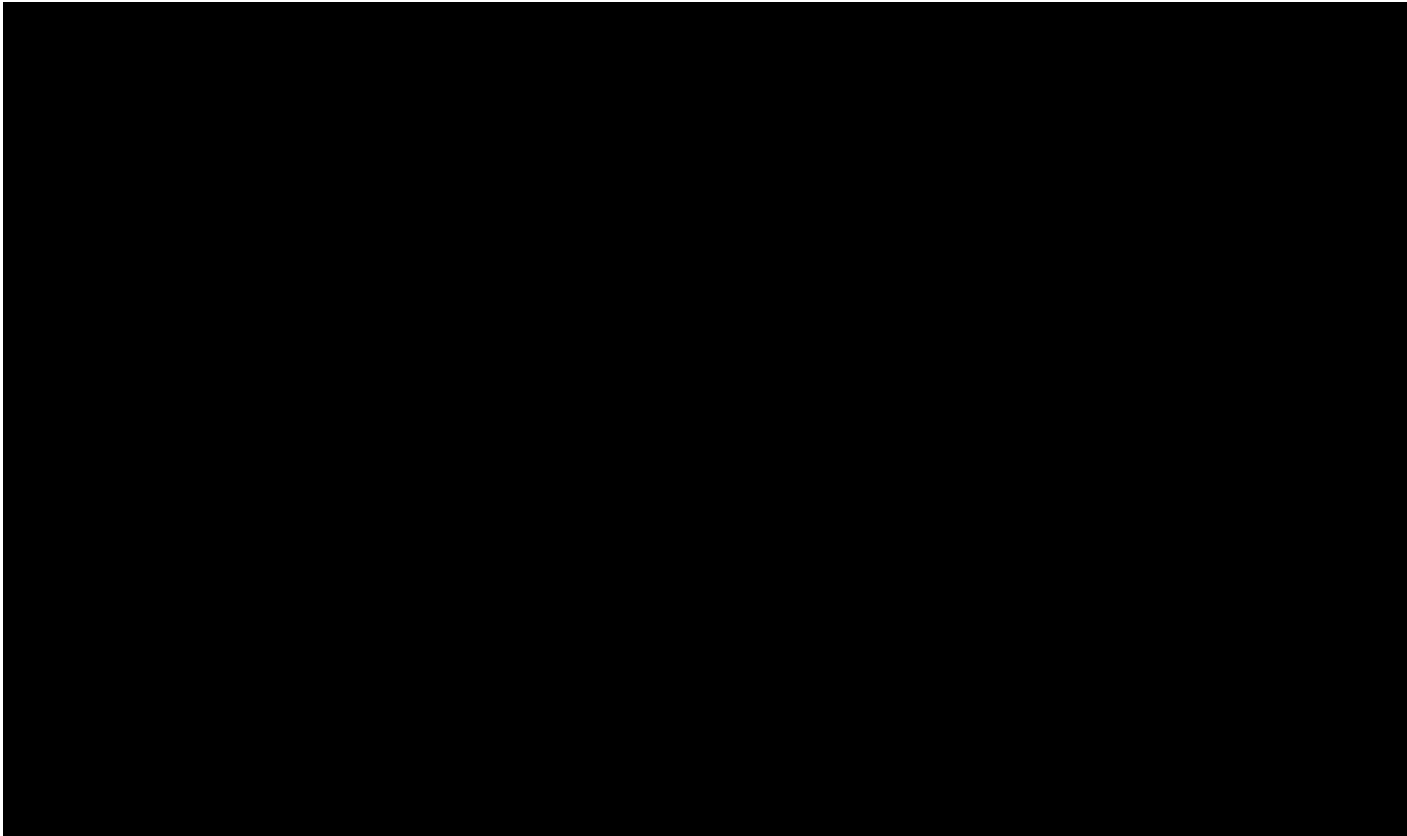
[REDACTED]

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

[REDACTED]	
[REDACTED]	[REDACTED]
• [REDACTED]	[REDACTED]
• [REDACTED]	[REDACTED]
• [REDACTED]	[REDACTED]
• [REDACTED]	[REDACTED]
• [REDACTED]	[REDACTED]
• [REDACTED]	[REDACTED]
• [REDACTED]	[REDACTED]
• [REDACTED]	[REDACTED]

- Level 4: Internal support to cover issues that need to be escalated and to be handled only by Coupa

[REDACTED]



3. Supplier Enablement Services

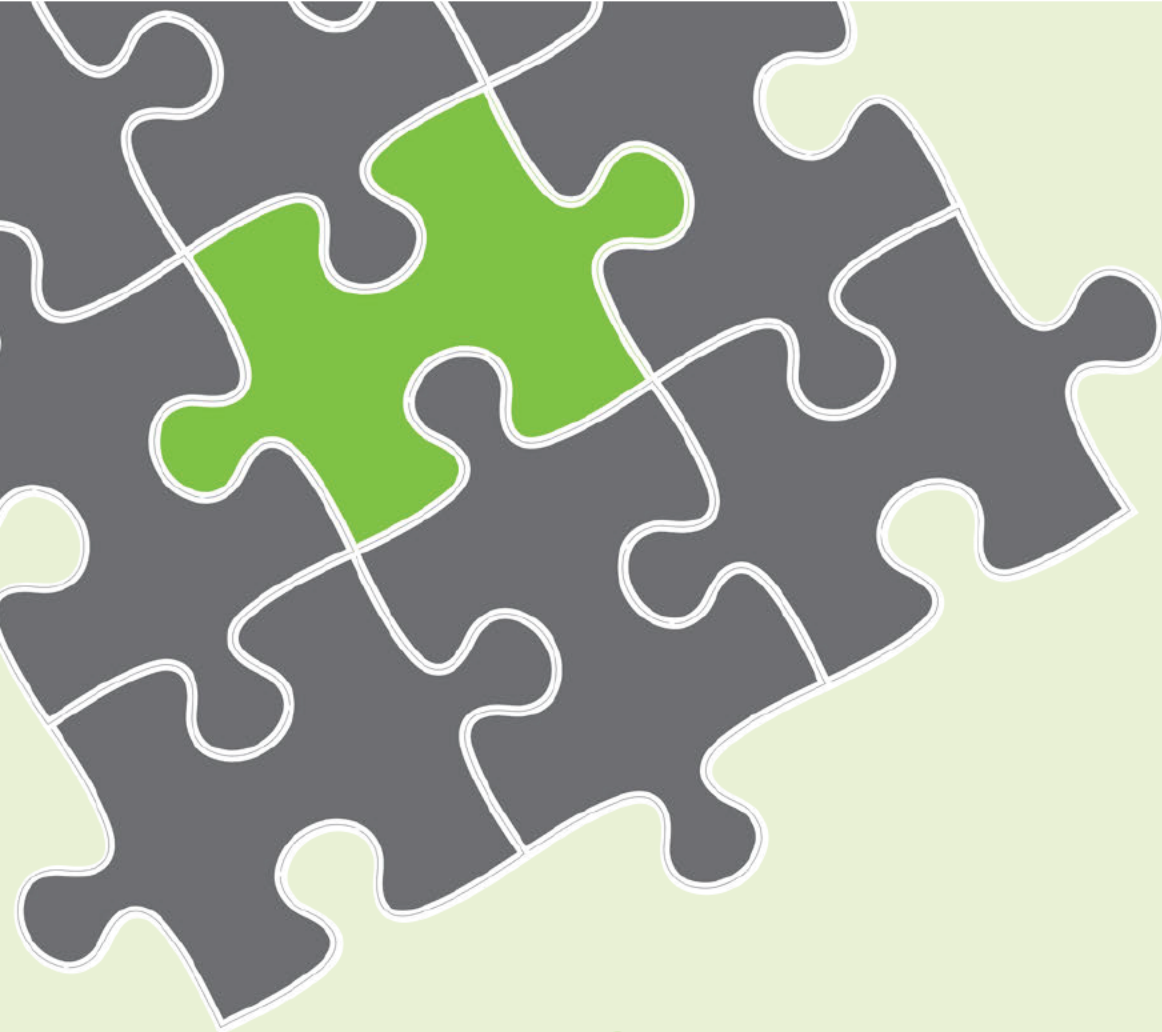
In addition to the supplier enablement effort completed during the implementation, Deloitte provides services to assist Lead State or Participating Entities with ongoing supplier enablement services [REDACTED]

[REDACTED]

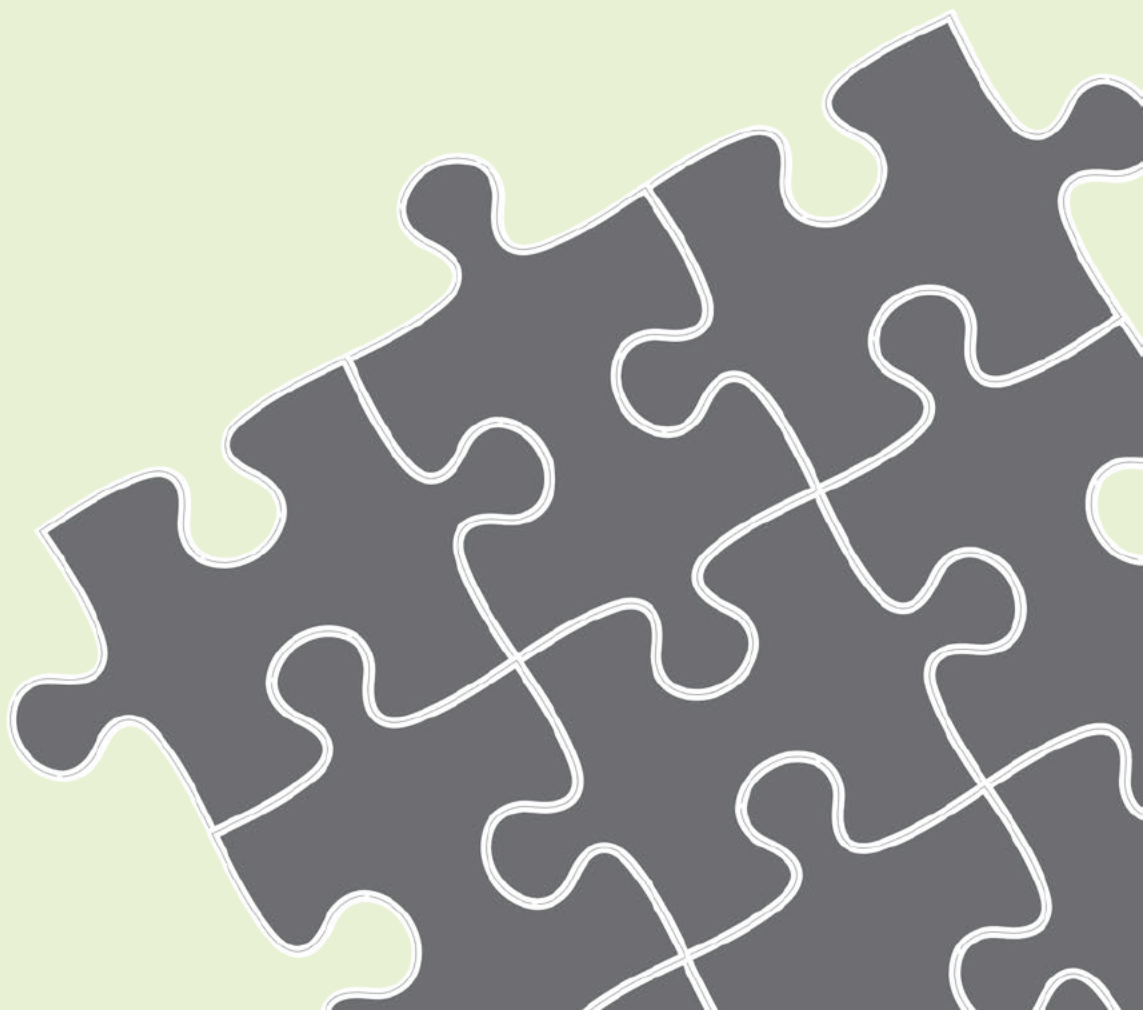
- [REDACTED]
- [REDACTED]
- [REDACTED]

[REDACTED]

[REDACTED]



2. Video Demonstrations





2. Video Demonstrations

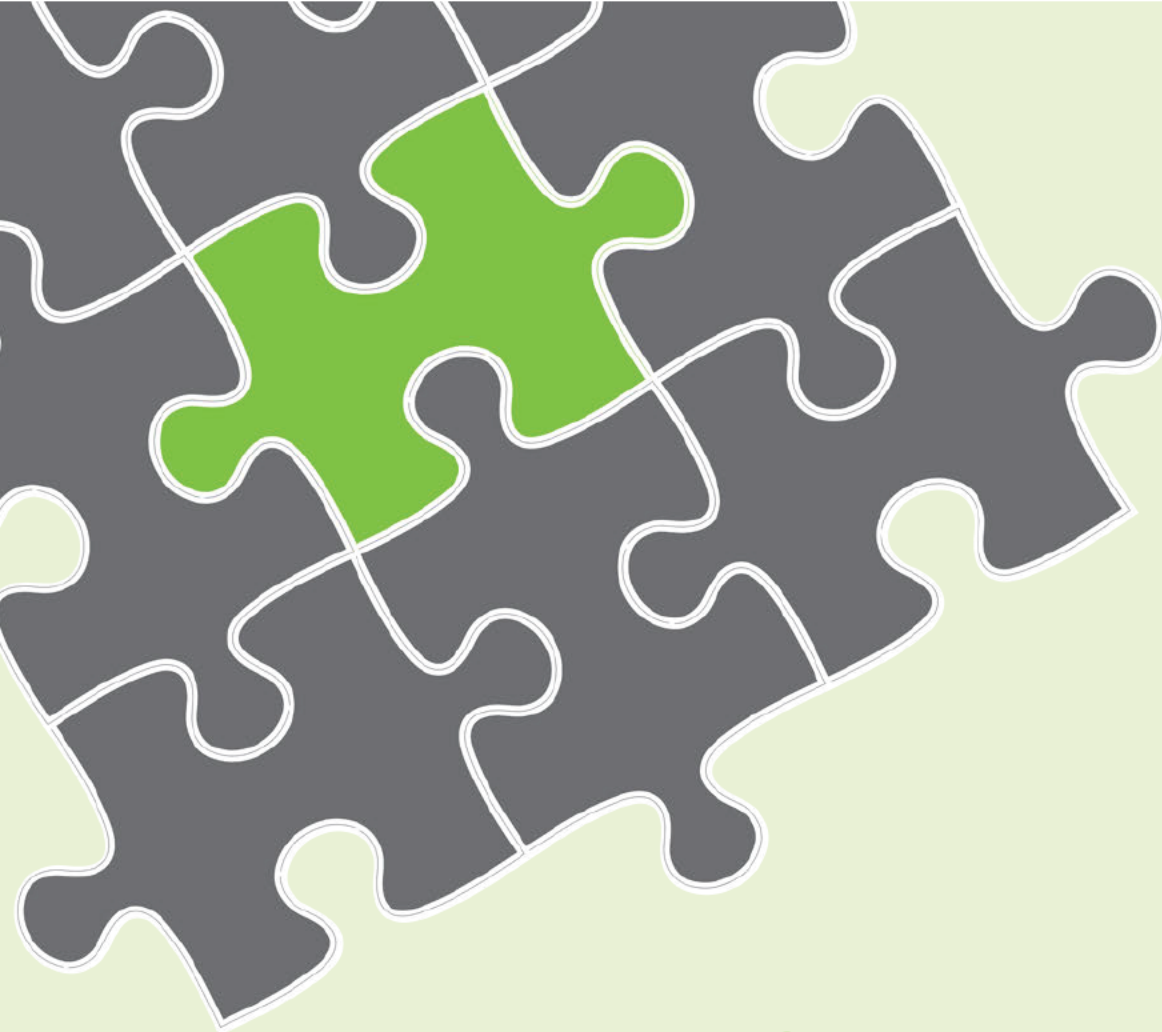
RFP 202102021: Section III – Proposed Solutions and/or Services, 2. Video Demonstrations, Page No. 46

2. Video Demonstrations

In their proposal submissions, Bidders are to provide a link to a recorded video demonstration of the product(s)/service(s) they are proposing in their submissions. These demonstrations are to be no more than 45 minutes in length. Video demonstrations should provide evaluators with a supplementary, visual depiction of the content of the Bidder's proposal and demonstrate the real-time functionality/capabilities and features of the Bidders' system/services. Bidders are wholly responsible for ensuring the links provided are working and their videos are accessible to evaluators. Bidders who fail to provide a video recording or whose video recordings cannot be accessed by evaluators may have their scores negatively impacted. In addition to the above, the State reserves the right to request additional live or recorded demonstrations of a product or service as may be necessary to clarify the contents of a specific Bidder's proposal.

As indicated in the proposal instructions, the link to the Deloitte's recorded Coupa video can be found here:

<https://www.youtube.com/watch?v=osCiXFlymbk>



Appendix





Appendix

A. List of Standard Roles

Name	Description	Omnipotent	System Role
Admin	Full system access to setup and maintain the application	TRUE	TRUE
User	Standard role for all users who need to create and/or approve requisitions	FALSE	TRUE
Buyer	Adds ability to manage requisitions, orders, RFQs, suppliers and items, plus access to purchase order reports	FALSE	TRUE
Accounts Payable	Adds ability to manage suppliers, view orders and create invoices	FALSE	TRUE
Central Receiving	Adds ability to create receipts and manage inventory	FALSE	TRUE
Accounting Supervisor	Adds ability to manage suppliers, financial setup, budgets and approve on-hold invoices	FALSE	TRUE
Edit Requisition as Approver	Adds ability to edit a requisition when you are approving it	FALSE	TRUE
Inventory Manager	Adds ability to create items, view inventory balances, and adjust/transfer items	FALSE	TRUE
Expense User	Standard role for all users who need to create and/or approve expense reports	FALSE	TRUE
Expense Auditor	Adds ability to approve expense reports in accounting review	FALSE	TRUE
Expense Processor	Adds ability to manage expense reports, except for audit	FALSE	TRUE
Edit Expense Report as Auditor	Adds ability to edit an expense report as an expense auditor	FALSE	TRUE
Supplier	Access for supplier for invoicing capabilities	FALSE	TRUE
Dashboard	Access for executive dashboards	FALSE	TRUE
Edit Invoice as Approver	Adds ability to edit an invoice when you are approving it	FALSE	TRUE
Quote Supplier	Access for sourcing suppliers to login	FALSE	TRUE
Invoice Manager	Adds ability to unlock an invoice locked by another user. To be used in conjunction with other roles that give invoice capabilities	FALSE	TRUE
Edit Expense Report as Approver	Adds ability to edit an expense report as an expense approver	FALSE	TRUE
Fulfillment Manager	Adds ability to manage fulfillment of internal orders for the internal supplier assigned to the user	FALSE	TRUE
Warehouse Manager	Adds ability to view and manage, but not receive, items in warehouses assigned to the user	FALSE	TRUE
Picker	Adds ability to view and work with pick lists for items in warehouses assigned to the user	FALSE	TRUE
Receiver	Adds ability to view the Receive sub-tab and receive items into warehouses assigned to the user	FALSE	TRUE
Counter	Adds ability to view Cycle Counts sub-tab and perform cycle counts	FALSE	TRUE
Inventory Reporting	Adds ability to view reports on the Inventory sub-tab, without warehouse or internal supplier restrictions	FALSE	TRUE
Replenisher	Adds ability to specify a ship-to warehouse on requisitions	FALSE	TRUE
Sourcing Admin	Access to all sourcing permissions.	FALSE	TRUE
Sourcing Manager	Access to all the abilities (permissions) a Sourcing Admin has with the exception of the following: they can only edit the sourcing templates they have created, they cannot view or edit Sourcing Settings, they can only edit sourcing events they created.	FALSE	TRUE
Edit Contract as Approver	Adds ability to edit a contract when you are approving it	FALSE	TRUE
Supplier Manager	Adds ability to manage suppliers and dashboards	FALSE	TRUE

Name	Description	Omnipotent	System Role
Upgrade Administrator	Gets upgrade and maintenance notifications	FALSE	TRUE
CorpCardAdmin	Unassigned Corporate Card Reports Admin	FALSE	TRUE
SAN Invoice Supplier	Allows a SAN supplier user to flip invoices only	FALSE	TRUE
SAN SIM Supplier	Allows a SAN supplier user to enter SIM information only	FALSE	TRUE
Analytics Pro	Adds ability to access and edit Coupa Analytics dashboards. All data will be visible.	FALSE	TRUE
Sandbox Administrator	Access to refresh the sandbox instances	FALSE	TRUE
SAN Service Manager	Adds ability to confirm work via link in email	FALSE	TRUE
Supplier Risk	Adds ability to view supplier risk	FALSE	TRUE
Edit PO Change as Approver	Adds ability to edit a PO Change when you are approving it	FALSE	TRUE
Sourcing Optimization Manager	Ability to access Sourcing Optimization module	FALSE	TRUE
Risk Score Calibration	Enables the user to set the weights to determine Risk Score and health for the particular Coupa instance	FALSE	TRUE
Invoice Payment Processor	Create and edit payments, cannot approve	FALSE	TRUE
Invoice Payment Approver	Can only approve payments for payment	FALSE	TRUE
Edit Invoice Payment as Approver	Can edit and approve payments	FALSE	TRUE
Invoice Payments Admin	Administrator of the payments application	FALSE	TRUE
Invoice Payment Releaser	Can release payment batches	FALSE	TRUE
Purchase Order Change Manager	This role allows users to manage changes to POs of other users even if they are not directly connected to the requisition or the PO. Users with this role will still be limited by Account Security defined	FALSE	TRUE
CSP API	Ability to access enterprise endpoints	FALSE	TRUE
Virtual Card for PO Admin	Admin for CoupaPay Virtual Cards for PO	FALSE	TRUE
Virtual Card for PO Manager	Can view cards, statements, and take action on cards	FALSE	TRUE
Virtual Card for PO Processor	Can view and take action on cards	FALSE	TRUE
CSP Catalog	Can view and take action on catalogs	FALSE	TRUE
CSP Invoice	Can view and take action on invoices	FALSE	TRUE
CSP Order	Can view and take action on orders	FALSE	TRUE
CSP ASN	Can view and take action on asns	FALSE	TRUE
CSP Service and Time Sheet	Can view and take action on service and time sheets	FALSE	TRUE
CSP Profile	Can view and take action on service and time sheets	FALSE	TRUE
Edit Published Contract	Adds ability to edit a contract in the published state, without creating an amendment	FALSE	TRUE
Spend Guard Auditor	Can view and take action on Spend Guard flagged behaviors	FALSE	TRUE
Spend Guard Employee Unmask	Can unmask employee within spend guard	FALSE	TRUE
AI Classifier	Access for AI Classification	FALSE	TRUE
Contract Template Admin	Access to manage templates for contracts	FALSE	TRUE
Archive Admin	Adds ability to access and manage Archive	FALSE	TRUE
Supplier Performance	Access to Supplier Performance	FALSE	TRUE
Contingent Workforce User	Grants access to Coupa Contingent Workforce	FALSE	TRUE
Load Published Contract	Adds ability to load published contract via CSV	FALSE	TRUE
CSP Payment	Can view and take action on payments	FALSE	TRUE
Sourcing Advantage	Gives access to Community > Sourcing Advantage tab.	FALSE	TRUE
Risk Assess User	Grants access to Coupa Risk Assess	FALSE	TRUE



Name	Description	Omnipotent	System Role
Expense Payment Processor	Create and edit Expense payments, cannot approve	FALSE	TRUE
Expense Payment Approver	Can only approve payments for Expense payment	FALSE	TRUE
Edit Expense Payment as Approver	Can edit and approve Expense payments	FALSE	TRUE
Expense Payments Admin	Administrator of the Expense Payments Application	FALSE	TRUE
Expense Payment Releaser	Can release Expense payment batches	FALSE	TRUE
CSP Change Order	Can view and take action on change orders	FALSE	TRUE
CLM Advanced User	Grants access to CLM Advanced	FALSE	TRUE
Dynamic Discounting Approver	Adds ability to approve dynamic discounting requests	FALSE	TRUE
Early Payment Discount Administrator	Manages Dynamic Discounting Settings for buyer	FALSE	TRUE
CSP Pay Me Now	Allow CSP User to access Pay Me Now/Dynamic Discounting menu	FALSE	TRUE
CSP Restricted Order Access	Restrict access to Purchase Orders and PO Changes	FALSE	TRUE
CSP Restricted Service and Time Sheet Access	Restrict access to Service/Time Sheets	FALSE	TRUE
Archive Auditor	Auditor For Archive Entities	FALSE	TRUE
Payment Account Approver	Can approve & reject payment accounts	FALSE	TRUE
Category Manager	To access the Category Management Dashboard	FALSE	TRUE
Edit Approved Expense Report	Adds the ability to modify certain fields on an Expense Report in approved statuses	FALSE	TRUE
Travel Manager	Adds the ability to manage travel-related insights	FALSE	TRUE
SCF Administrator	Maintains program settings for SCF	FALSE	TRUE
Integration Admin	Configures and monitors integrations	FALSE	TRUE
Traveler	Employee who travels for the organization	FALSE	TRUE
Procurement Payment Manager	To edit and update payments	FALSE	TRUE
Analytics Viewer	Allow user to view analytics	FALSE	TRUE
Analytics Editor	Allow user to edit analytics	FALSE	TRUE
Analytics Admin	Allow user to admin analytics	FALSE	TRUE
Expense Preapproval Virtual Card Admin	Admin for Coupa Pay Virtual Cards on Expense Preapprovals	FALSE	TRUE
Expense Preapproval Virtual Card Manager	Can view card statements and take actions on cards	FALSE	TRUE
Expense Preapproval Virtual Card Processor	View and take action on cards	FALSE	TRUE
Supply Chain User	Role for all users who need to access Supply Chain	FALSE	TRUE
Treasurer	Standard role for all users who need access to the Treasury Management solution	FALSE	TRUE
CFO Role	CFO Role created to provide dashboard and approval information access. • Spend Alerts • Approval Limits • Budget Lines • Supplier Reviews • Dashboard • Product Reviews • Order Header – Show • Buying – Req Detail	FALSE	FALSE



Name	Description	Omnipotent	System Role
Split Accounting		FALSE	FALSE
Copy of Expense User	Standard role for all users who need to create and/or approve expense reports	FALSE	FALSE
Buyer sans bypass	Adds ability to manage requisitions, orders, RFQs, suppliers and items, plus access to purchase order reports	FALSE	FALSE
CCC Admin Templates		FALSE	FALSE
Act As User		FALSE	FALSE
Custom Field admin		FALSE	FALSE
CCC Procurement Manager		FALSE	FALSE
CCC Procurement User		FALSE	FALSE
CCC Contract Requestor		FALSE	FALSE
CCC Signatory		FALSE	FALSE
CCC SME Stakeholder		FALSE	FALSE
Copy of Guest	Implicit role for all accessors of the site	FALSE	FALSE
End User Risk Aware	Adds ability to view supplier risk	FALSE	FALSE
Approver – Select Contract	Lets a user who's part of an approval chain select a contract on a free-form request.	FALSE	FALSE
Requisition Headers – Select Contract	Lets a user select a contract when creating a free-form request.	FALSE	FALSE
Open Buy Users	R24 Required permission for Open Buy Reqs	FALSE	FALSE
Homepage collapse/show	R25 – new permission to avoid warning banner	FALSE	FALSE
V Card Requester		FALSE	FALSE
Form Viewer	Show/Edit Contract Form Responses	FALSE	FALSE
Show own vcard charges	Gives users ability to show their own vcard charges	FALSE	FALSE
Permissions	catch all for stray permissions that cause issues when upgrading to new releases, etc.	FALSE	FALSE
Bought together		FALSE	FALSE
Approve Time Sheets		FALSE	FALSE
Test Drive		FALSE	FALSE
Invoice Payments Panel Apps Access	Makes Invoice Payments Bank Transfer Panel App accessible	FALSE	FALSE
InvoiceSmash's Role		FALSE	TRUE

Figure 41. Standard roles.

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