Coupa Supplier Training Guide
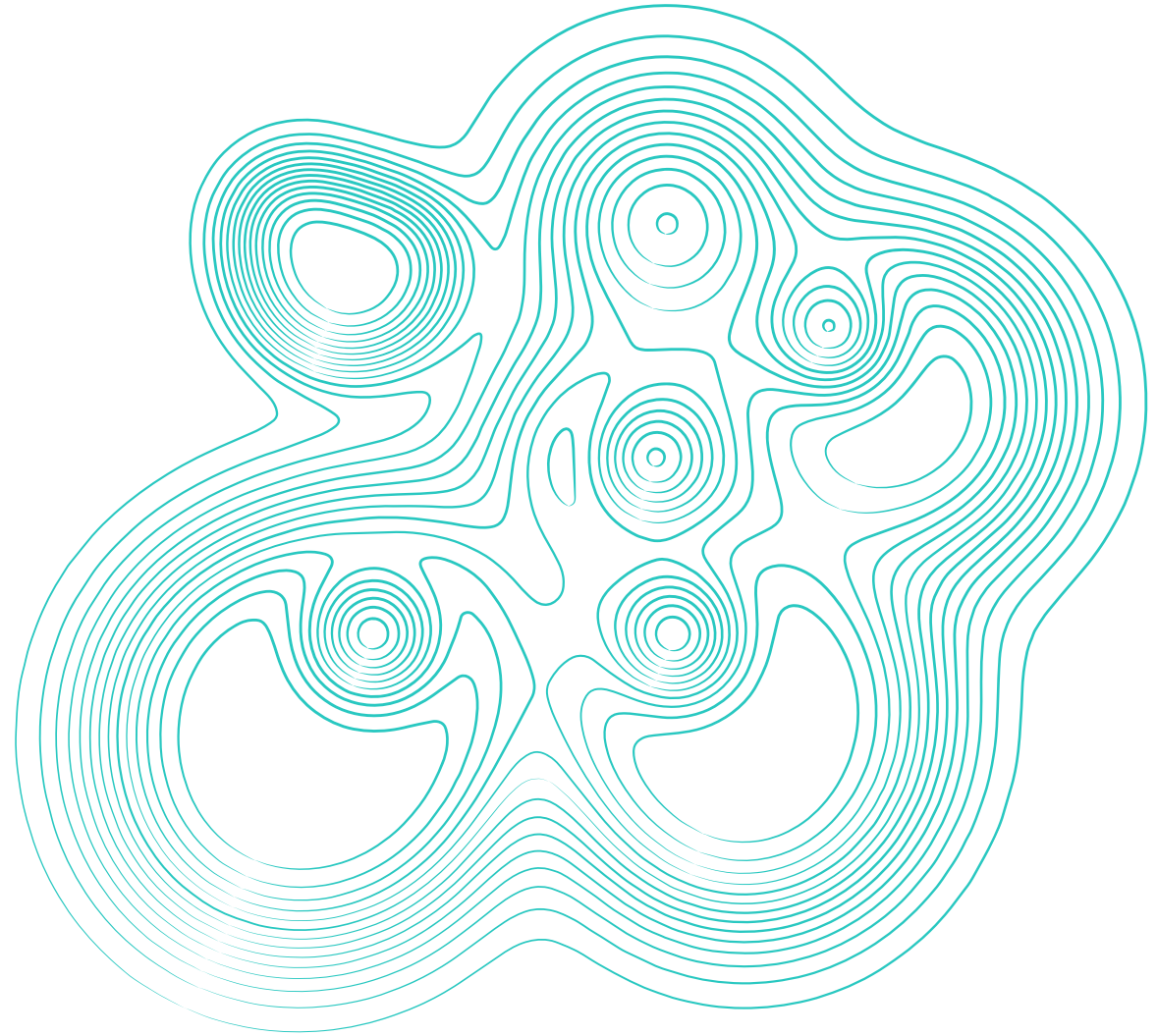
worley
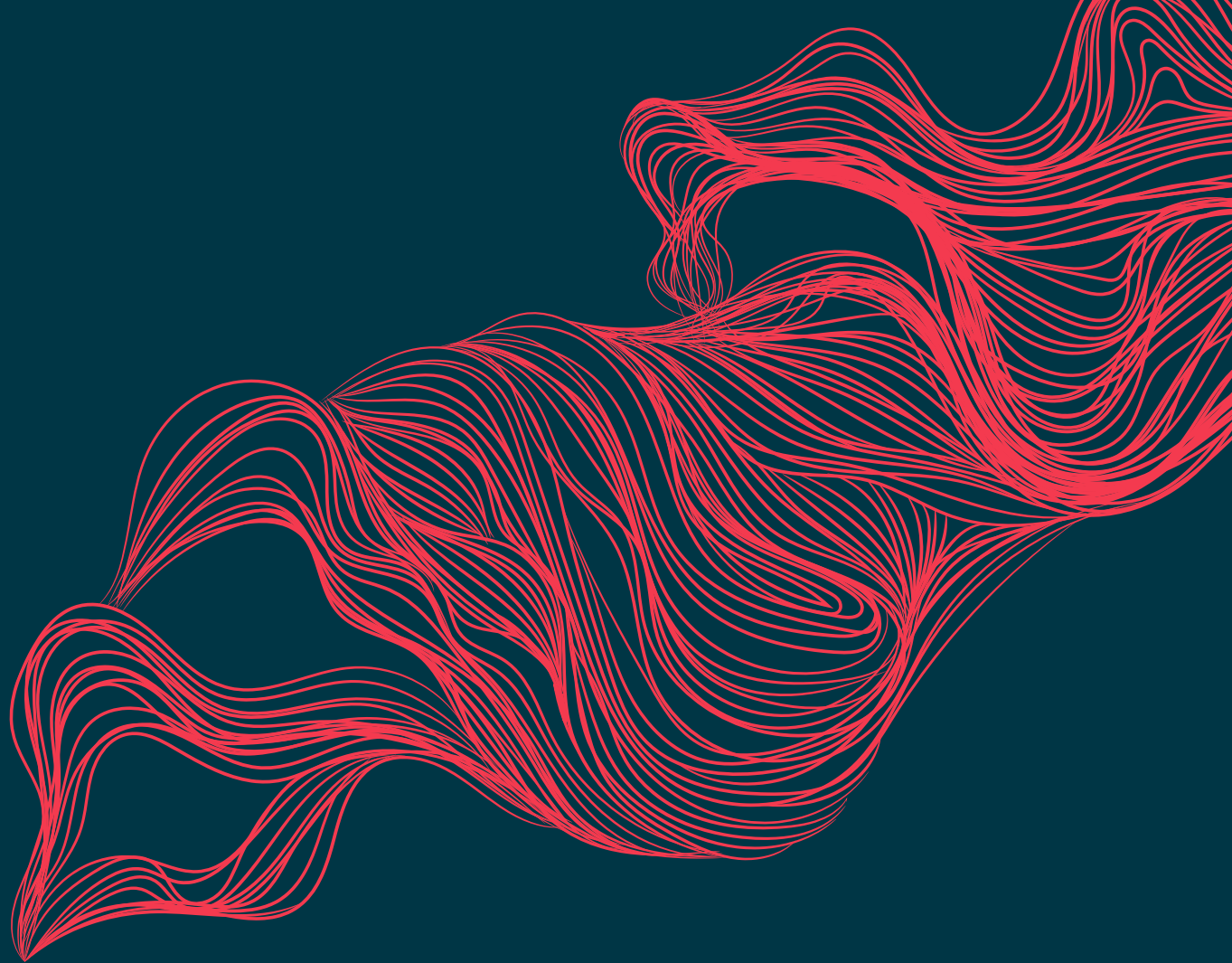
Agenda / Contents
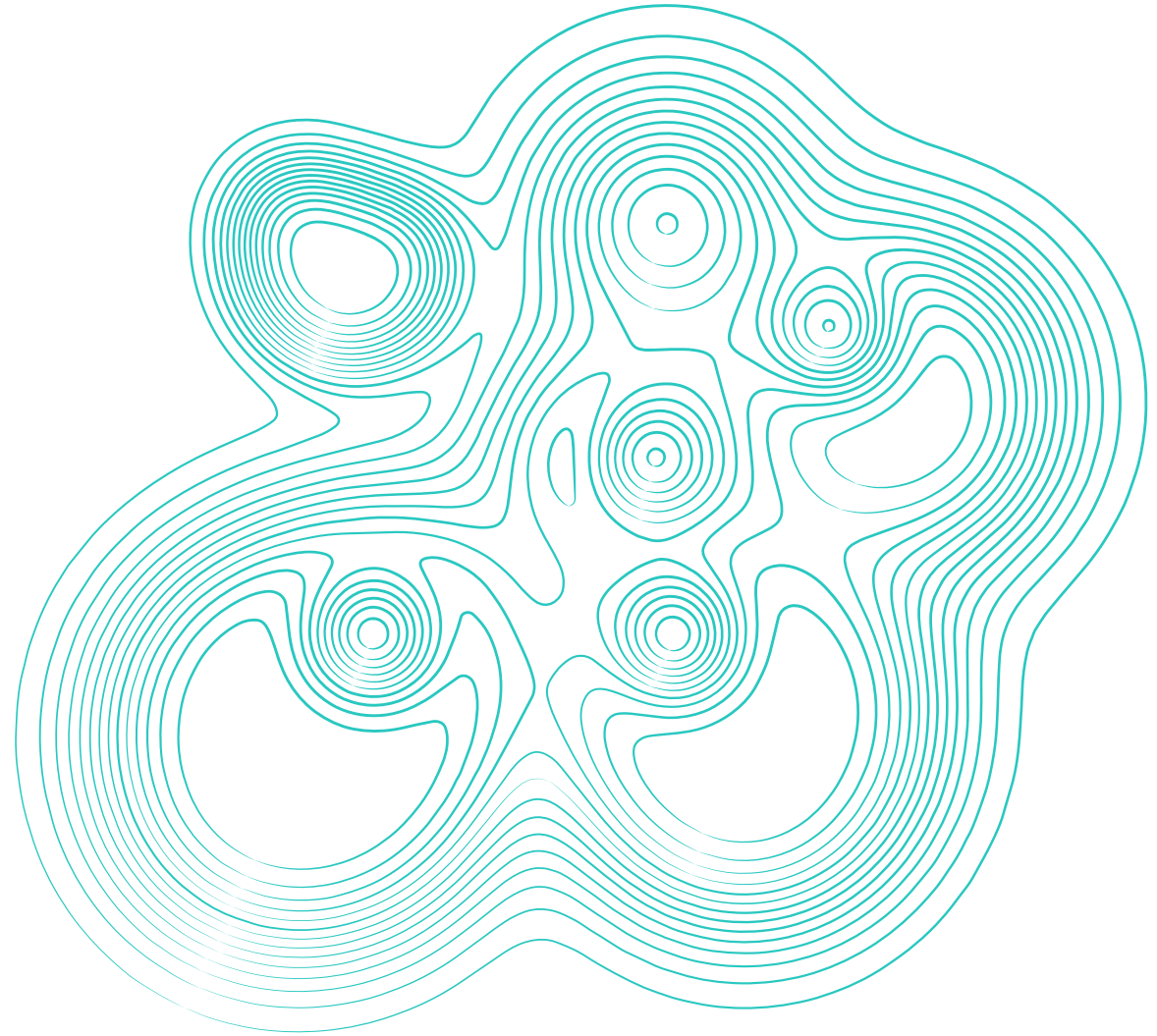
Introduction to Coupa Supplier Portal (CSP)

Why Coupa?

- Coupa is a cloud-based e-procurement platform for business spend, delivering measurable value through real-time spend visibility, control, compliance, and agility.

- Gartner, the world's leading research and advisory company, named Coupa **a Leader** in 2024 for its completeness of vision and ability to execute. Coupa was one of only two vendors to receive this recognition.

- One of the criteria that ranked Coupa as number one is its high user adoption.

- Coupa provides three major releases or upgrades per year –in January, May and September – all free of charge.

COUPA SUPPLIER PORTAL

1. Introduction

Coupa Supplier Portal | Introduction

The Coupa Supplier Portal (CSP) is a free tool that enables suppliers to easily do business with their customers. It simplifies the management of procurement processes and related transactions. Depending on your specific Coupa configuration, content and settings are managed on a customer-by-customer basis.

Attributes *(from Supplier POV)*

Purpose	**Efficiently conduct business with Worley** by engaging with key stakeholders and managing different aspects of the relationship.
Functionality	Suppliers can: • Manage supplier information. • Update profile and payment information. • Respond to Sourcing Events.
Focus	Interface to interact with buyers across different procurement processes and transactions, including sourcing and supplier management, with potential expansion to purchasing and invoicing in the future.
User Role	Suppliers use to collaborate with Worley buyers.
Account Management	Accounts are managed individually for each supplier, with the option to add multiple users to each account, as necessary.

Note: As of 2025, Worley is utilizing the CSP for Supplier Information Management with Risk Assessments and Sourcing.

COUPA SUPPLIER PORTAL

2. Manage Profile
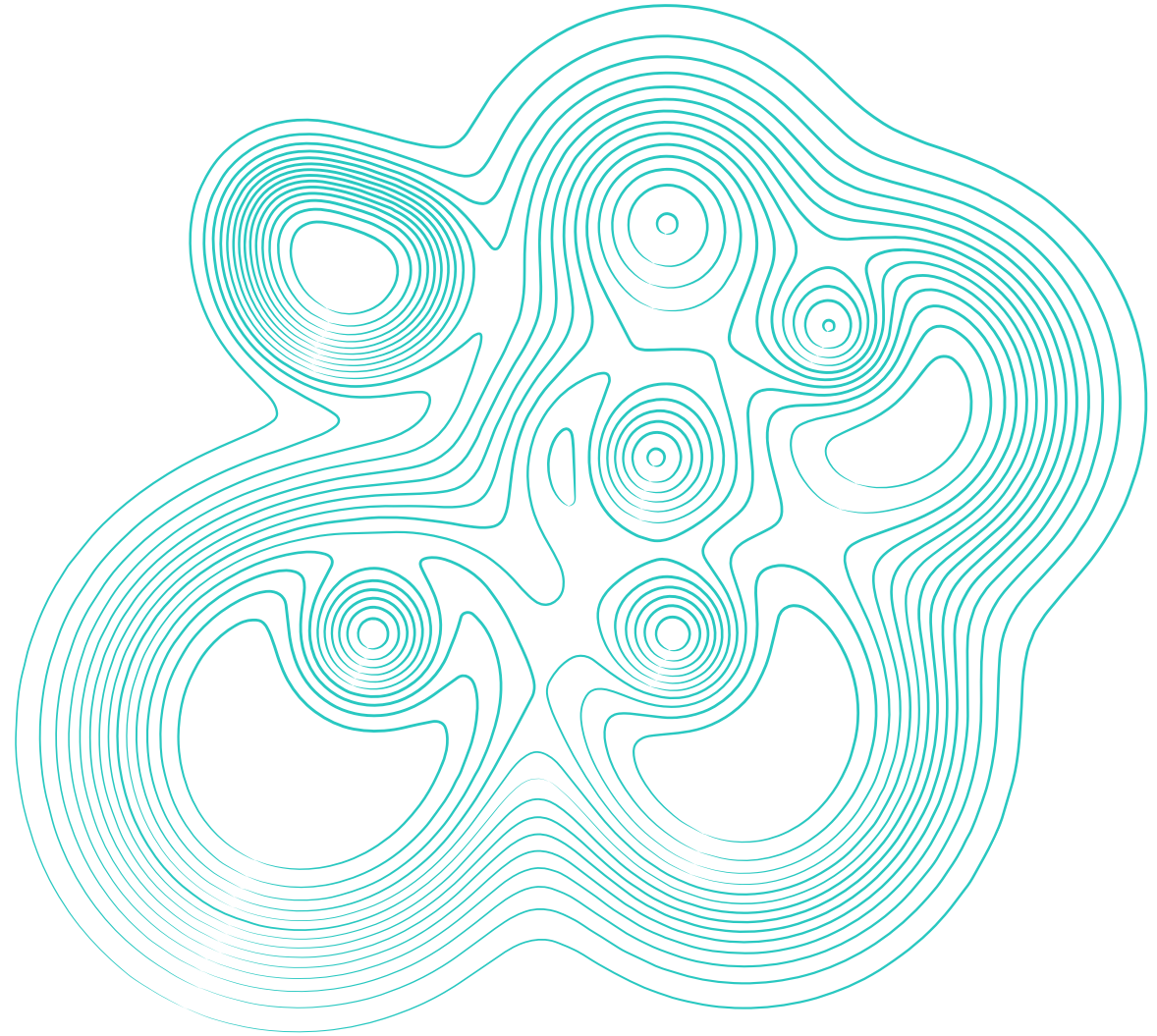
Coupa Supplier Portal | Manage Profile

A. Business Profile

In the Coupa Supplier Portal, you have a public profile that is visible in the Coupa Supplier Portal Directory. This allows potential Coupa customers to find and view your profile.

To get started with filling out your profile information:

1. Select **Profile** in the top menu.
2. Click **Edit Profile** to take you to the section you want to update and complete your information.

TIP: Profile data doesn't automatically update customer request ... see slide 28 for instructions on how to update customer information requests

Coupa Supplier Portal | Manage Profile

B. Legal Entities

1. The legal entities section stores yours most up-to-date information in the Coupa Supplier Portal. This helps streamline the process of completing supplier information requests from customers, as the stored details will automatically populate relevant fields on the forms.
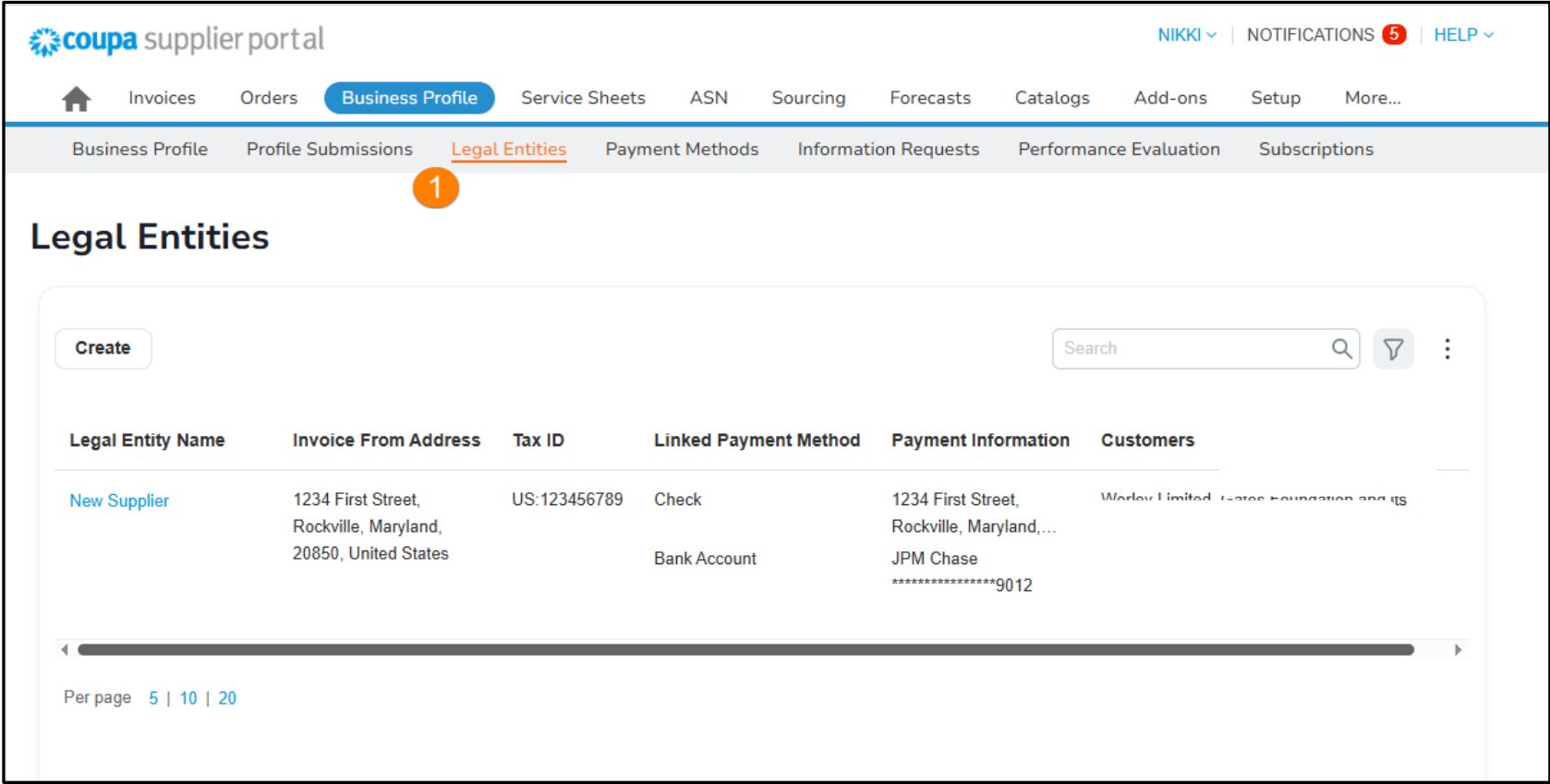
Coupa Supplier Portal | Manage Profile

B.1 Edit /Inactivate Existing Legal Entities

1. Navigate to **Business Profile** > **Legal Entities**.

2. Hover over the name of your legal entity and select the pencil to edit.

3. The legal entity will open a side window for edits (skip this step if you are here to delete the entity).

4. Once edits are complete – select **SAVE or DELETE**.

Coupa Supplier Portal | Manage Profile

C. Payment Methods

1. The Payment methods section in the Coupa Supplier Portal stores your most up-to-date information. This makes it easier to complete supplier information requests from customers, as the stored details can be quickly selected to auto-populate the forms.

Coupa Supplier Portal | Manage Profile

C.1. Manage Payment Methods

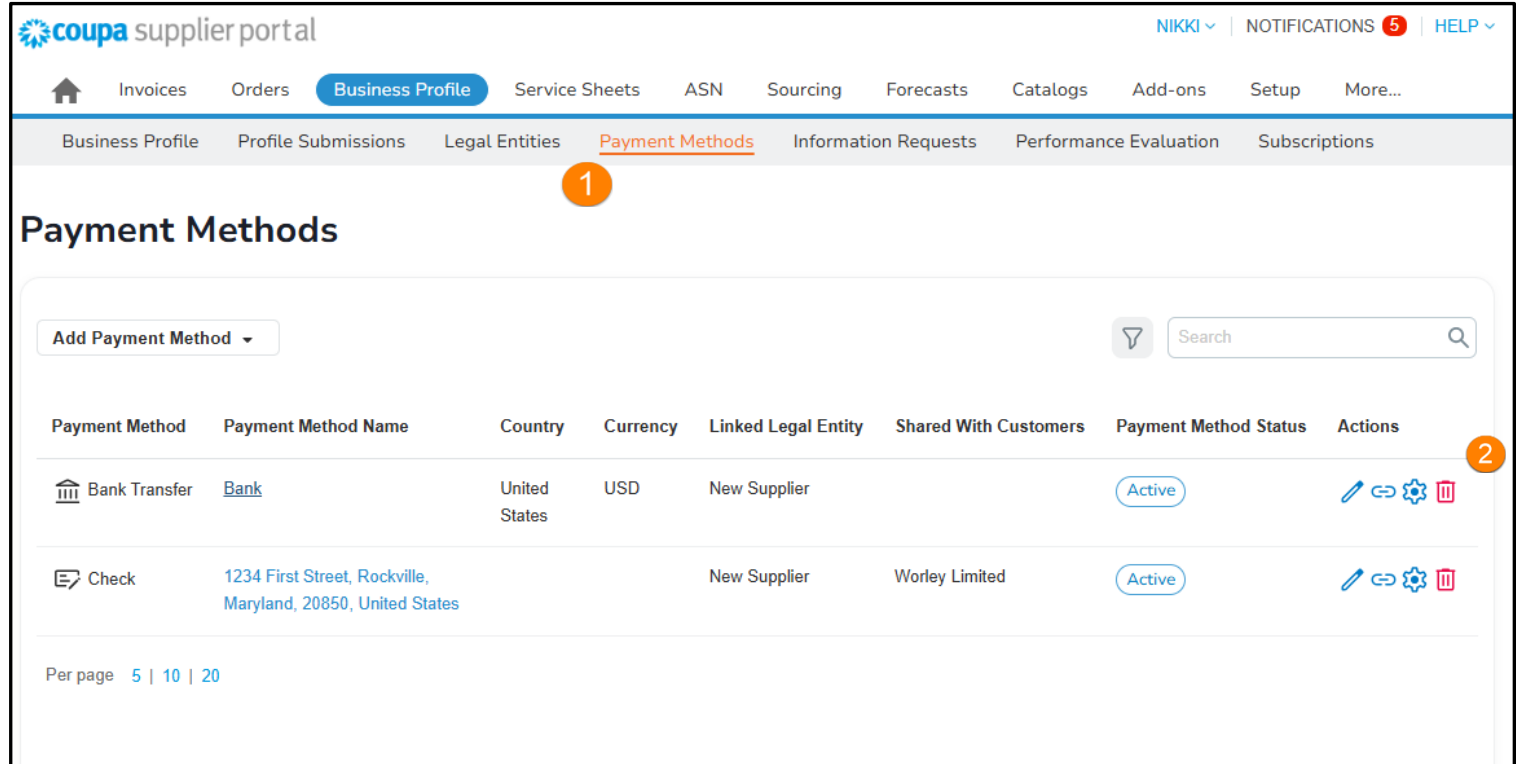1. Navigate to **Business Profile** > **Payment Methods**.

2. Select the ICON for corresponding action

   ✏️ 1. Pencil – Edit Existing

   🔗 2. Chain – Share/Remove Customers from Payment Method

   ⚙️ 3. Gear – Manage Linked Customers

   🗑️ 4. Trash Can – Delete the Payment Method

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coupa supplier portal

NIKKI ⌄ | NOTIFICATIONS **5** | HELP ⌄

🏠 | Invoices | Orders | **Business Profile** | Service Sheets | ASN | Sourcing | Forecasts | Catalogs | Add-ons | Setup | More...

Business Profile | Profile Submissions | Legal Entities | Payment Methods | Information Requests | Performance Evaluation | Subscriptions

①

Payment Methods

Add Payment Method ⌄

🔽 Search 🔍

Payment Method	Payment Method Name	Country	Currency	Linked Legal Entity	Shared With Customers	Payment Method Status	Actions
🏛️ Bank Transfer	Bank	United States	USD	New Supplier		Active	✏️ 🔗 ⚙️ 🗑️
📝 Check	1234 First Street, Rockville, Maryland, 20850, United States			New Supplier	Worley Limited	Active	✏️ 🔗 ⚙️ 🗑️

②

Per page 5 | 10 | 20

Coupa Supplier Portal | Manage Profile

D. Customer Profile

In the Coupa Supplier Portal, you have profiles for each of your connected customers, allowing you to manage the information you share with them. Some customers may send you information Requests, which you'll need to complete to update your details for that specific customer.

1. Navigate to **Profile** > **Information Requests**. You can also access Information Requests by clicking links in notifications.

2. Select your customer from the Profile dropdown menu.

3. Select the most recent form by clicking on the form name.

4. Your Customer form will open and will default with any of the information you have on your profile page (from slide 8).

5. In the Choose Remit-To Address window, you can select **Choose** next to the existing addresses you want to send to your Customer, or you can select **Create New Remit-To Address** to add a new address.

6. Once all supplier information fields are completed, click **Submit for Approval**.

Coupa Supplier Portal | Manage Profile

E. Customer Profile Updates

If your company information changes or requires updating, it must be updated on the Worley Information requests.

1. Navigate to **Profile** > **Information Requests**. You can also access Information Requests by clicking links in notifications.

2. Select your customer from the Profile dropdown menu.

3. Select the most recently submitted form (in **Applied** status).

4. Verify applied status, scroll to the bottom select **Update Info.**

Coupa Supplier Portal | Manage Profile

E. Customer Profile Updates

If your company information changes or needs to be updated, you must make those changes within the Worley Information requests.

Be sure to review all fields – not just the one's you're updating.

Note: The following fields must be revalidated or completed each time you update the supplier information form. These fields are required to proceed with the update.

*Supplier Location
*Preferred Communication Language
*Are you identified as a Diverse Supplier?
*Is your diversity type as "Native/Indigenous Owned"?
*Is Freight Terms applicable/not applicable?
*Have you answered any of the previous three questions as "Yes"
*Are you aware if any of the parent entities, shareholders, ultimate beneficial owners, subsidiaries, or key executives of the third party are sanctioned by any jurisdiction or have any connections with sanctioned entities or countries?
*Are any of the following raw materials contained in the supplier's products?
*Does the supplier source the products or the raw materials from any of the following countries: North Korea, Eritrea, Mauritiana, Saudi Arabia, Turkiye,

Tajikistan, United Arab Emirates, Russia, Afghanistan, and Kuwait?

*Does the supplier require use of any low skilled or migrant labor?
*Will the landlord be engaging any cleaning, maintenance, security and/ or other support staff?
*Does the third party have an established process to conduct due diligence on its sub-contractors/suppliers to identify bribery, corruption and modern slavery red flags?
*Does the third party have a written policy addressing bribery, corruption, and other unethical business practices related risks?
*Does the third party have a written policy addressing modern slavery and human rights related risks?
*Does this form correspond to an update?

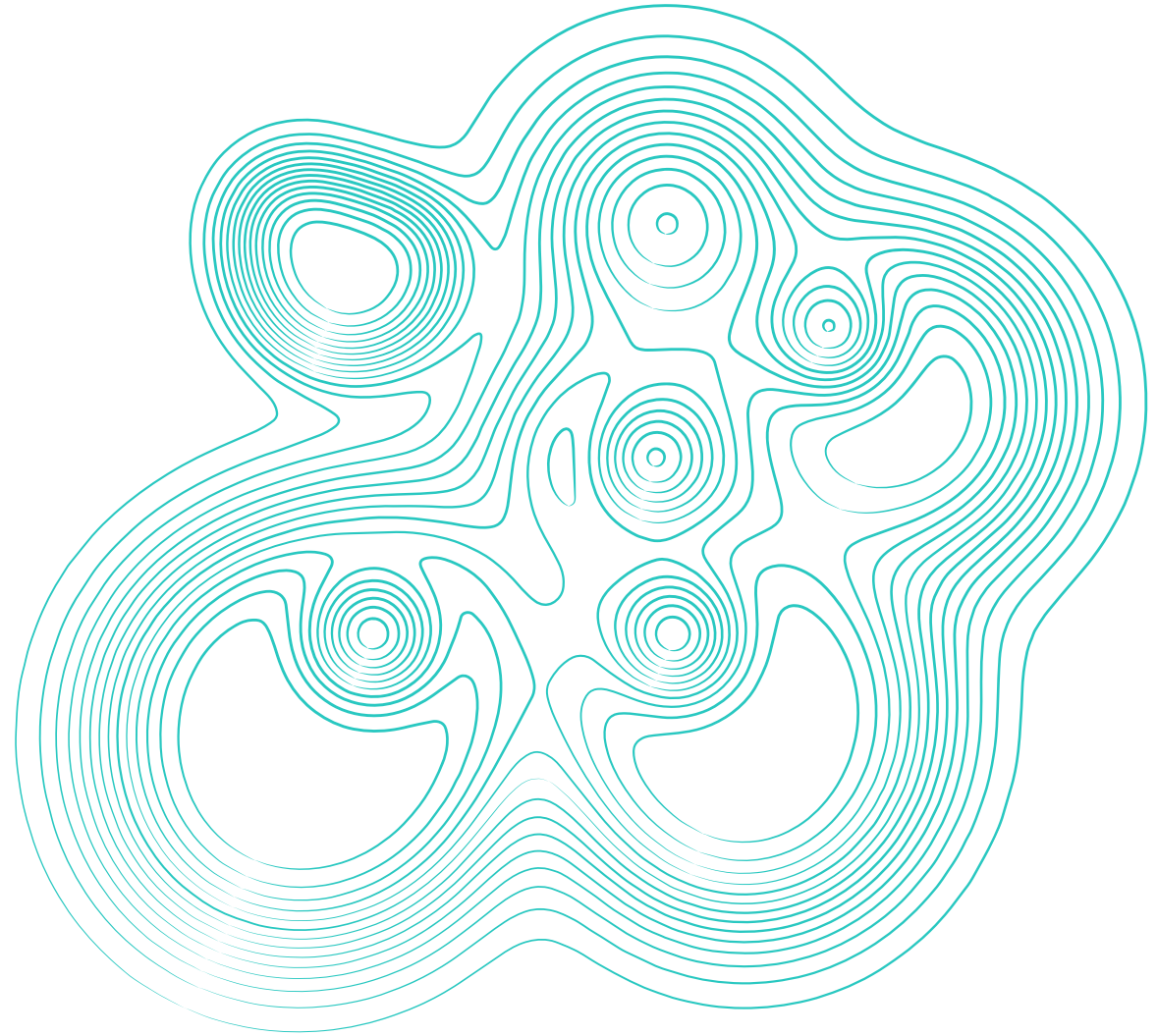5. Once you have updated the information needed and completed the fields above click **Submit for Approval.**

COUPA SUPPLIER PORTAL

3. Homepage

Coupa Supplier Portal | Homepage

Coupa Homepage – Profile Summary

In the Coupa Supplier Portal Homepage, the following details are displayed:

- **Recent Activity**

- **Announcements** - Your customers can create announcements to communicate with you about initiatives, promotions, and changes required for your collaboration through the portal.

- **Two Factor Security**

- **Join Requests**

- **Merge Suggestions** – Your company might have multiple accounts or profiles in the portal. This can occur when several users from the same organization register or are invited to the Coupa Supplier Portal using different email addresses.

- **Linked Customers** – Displays the count of your linked customers in the portal.

COUPA SUPPLIER PORTAL

4. Manage Account Settings
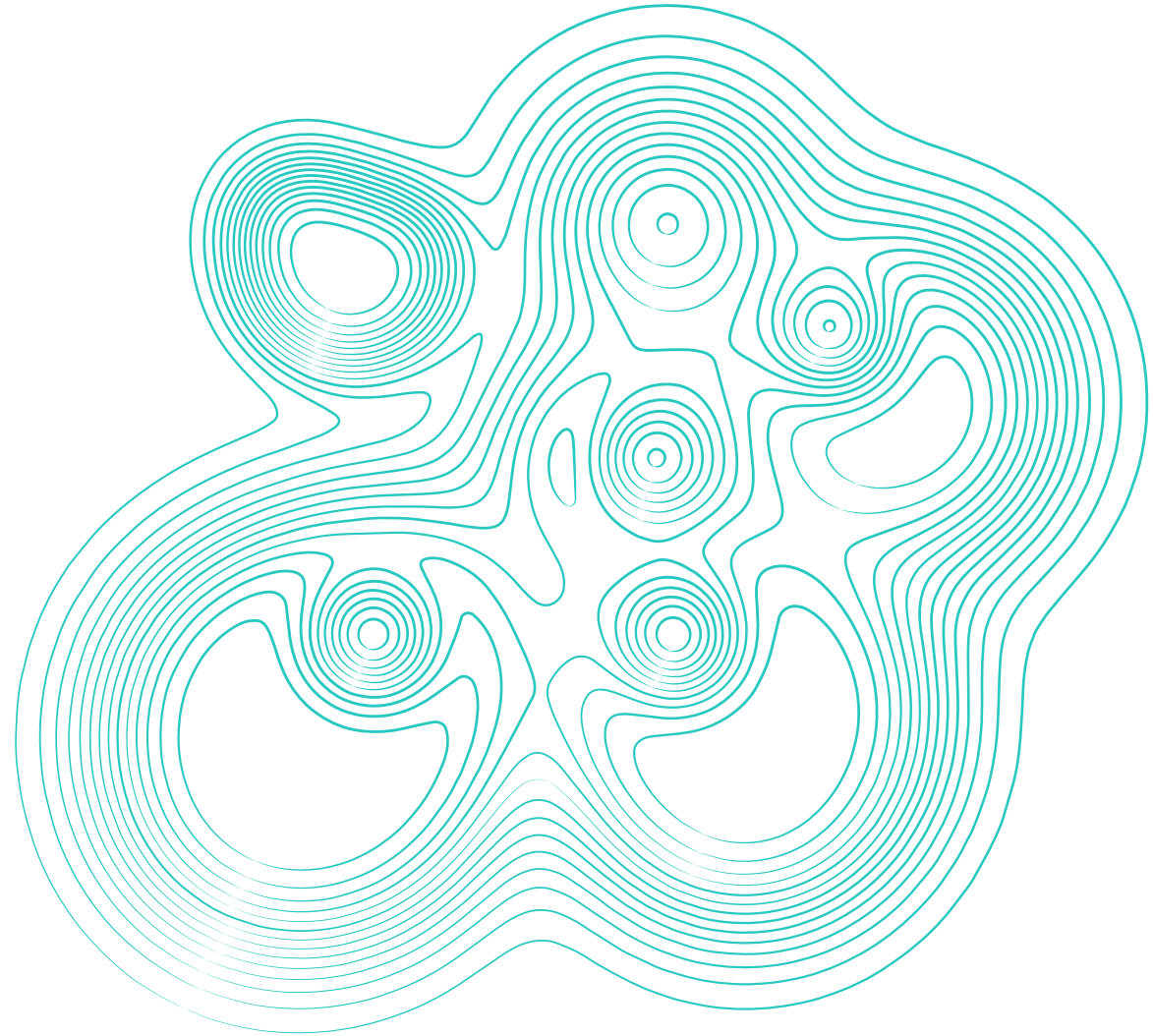
Coupa Supplier Portal | Notification Preference

Each Coupa Supplier Portal user will receive notifications based on their individual notification preferences. Users can choose which notifications they want to receive and select their preferred delivery channel-Online (within the Coupa Supplier Portal), Email, or SMS.

Steps on how to setup notification preferences:

1. Next to your username, click **Notifications** then select **Notification Preferences**.

2. Choose the types(s) of notifications you want to receive and select your preferred channel(s) for delivery-such as Online (Coupa Supplier Portal),Email, or SMS.

Coupa Supplier Portal | My Account

Coupa Security & Mutli-Factor Authentication

When the Supplier logs in for the first time, they are required to set-up two-factor authentication.

If they have enabled multi-factor authentication for SMS, check text messages to get the verification code.

The Supplier can also enable multi-factor authentication by following the below steps:

1. Hover your mouse on your username and click **Account Settings**.

2. Click **Security & Multi Factor Authentication**.
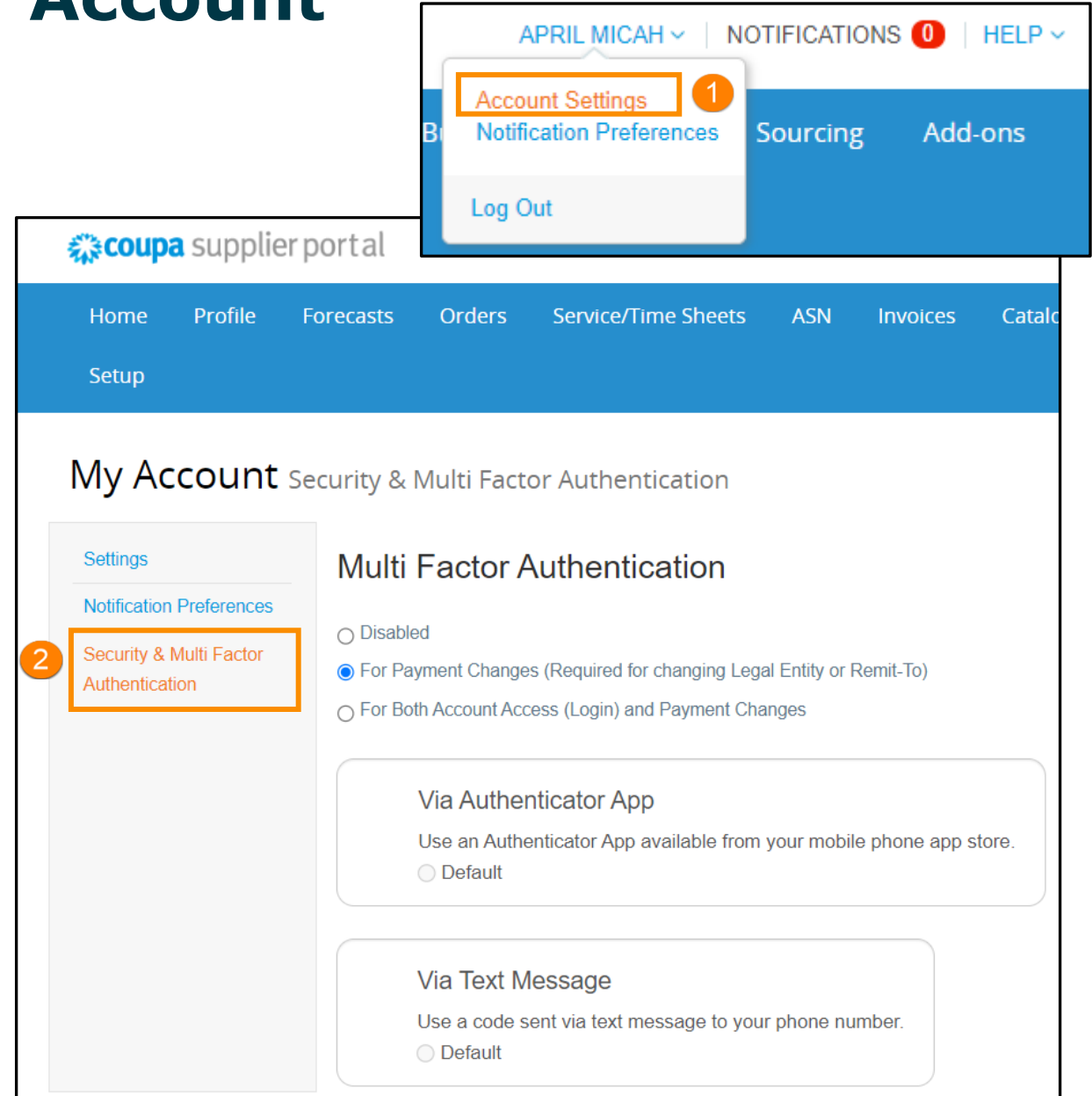
Coupa Supplier Portal | My Account

If Via Authentication App

1. Scan QR using your device.

2. Enter the 6-digit verification code from your device.

If Via Text Message

1. Enter the Cell Phone Number to receive the SMS notifications.

2. Confirm the reCAPTCHA then click '**Send Code'**.

3. Enter the 6-digit verification code sent to your phone.

Multi Factor Authentication App

1 Scan this QR code using your mobile device.

- Open your preferred authentication app on your mobile device. Learn more
- For most apps, select "Add" or "+" to scan the QR code or copy and paste the security key.

Coupa Supplier Portal
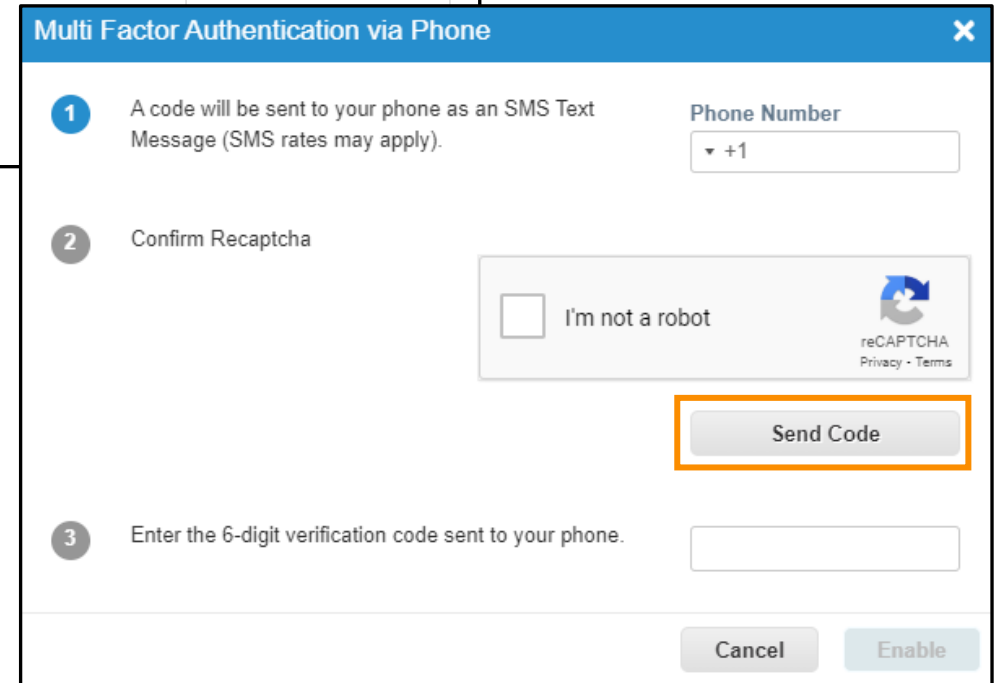
XZTK2VNGVQCIHEPQIL5IPSCZA NEUKSFF

Click to copy Security Key

2 Enter the 6-digit verification code from your device.   Code

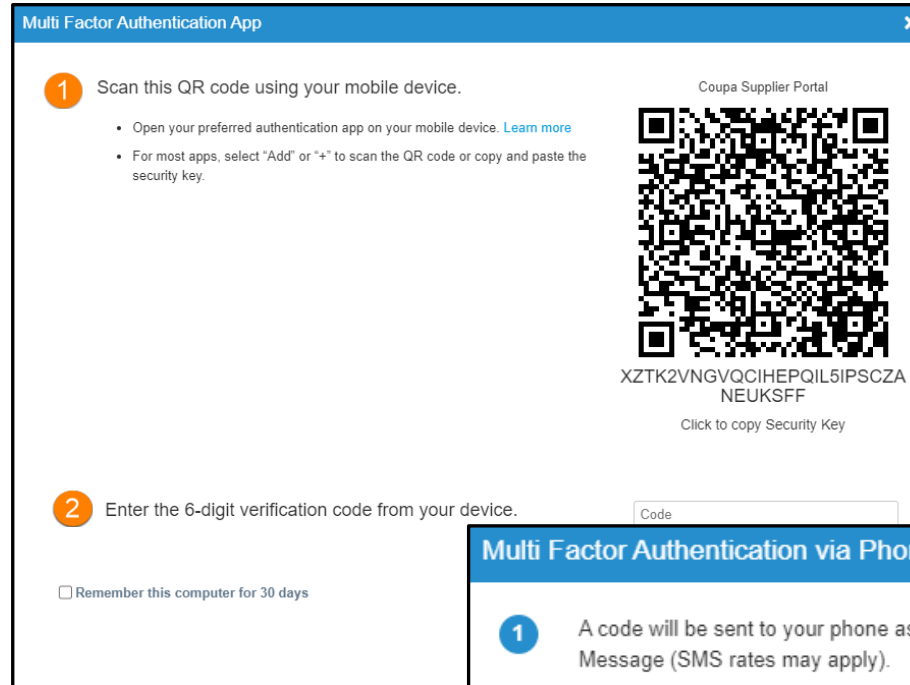☐ Remember this computer for 30 days

Multi Factor Authentication via Phone

1 A code will be sent to your phone as an SMS Text Message (SMS rates may apply).

Phone Number

▾ +1

2 Confirm Recaptcha

☐ I'm not a robot   reCAPTCHA
                        Privacy - Terms

Send Code

3 Enter the 6-digit verification code sent to your phone.

Cancel   Enable

COUPA SUPPLIER PORTAL

5. Admin Setup

Coupa Supplier Portal | Setup Admin

Navigate to **Setup** > **Admin** to manage users and merge requests, and the remit-to addresses for your customers, and other transactions within the portal.

A. Users

Invite new users and manage what each user can do in the CSP and which customers your users can interact with.
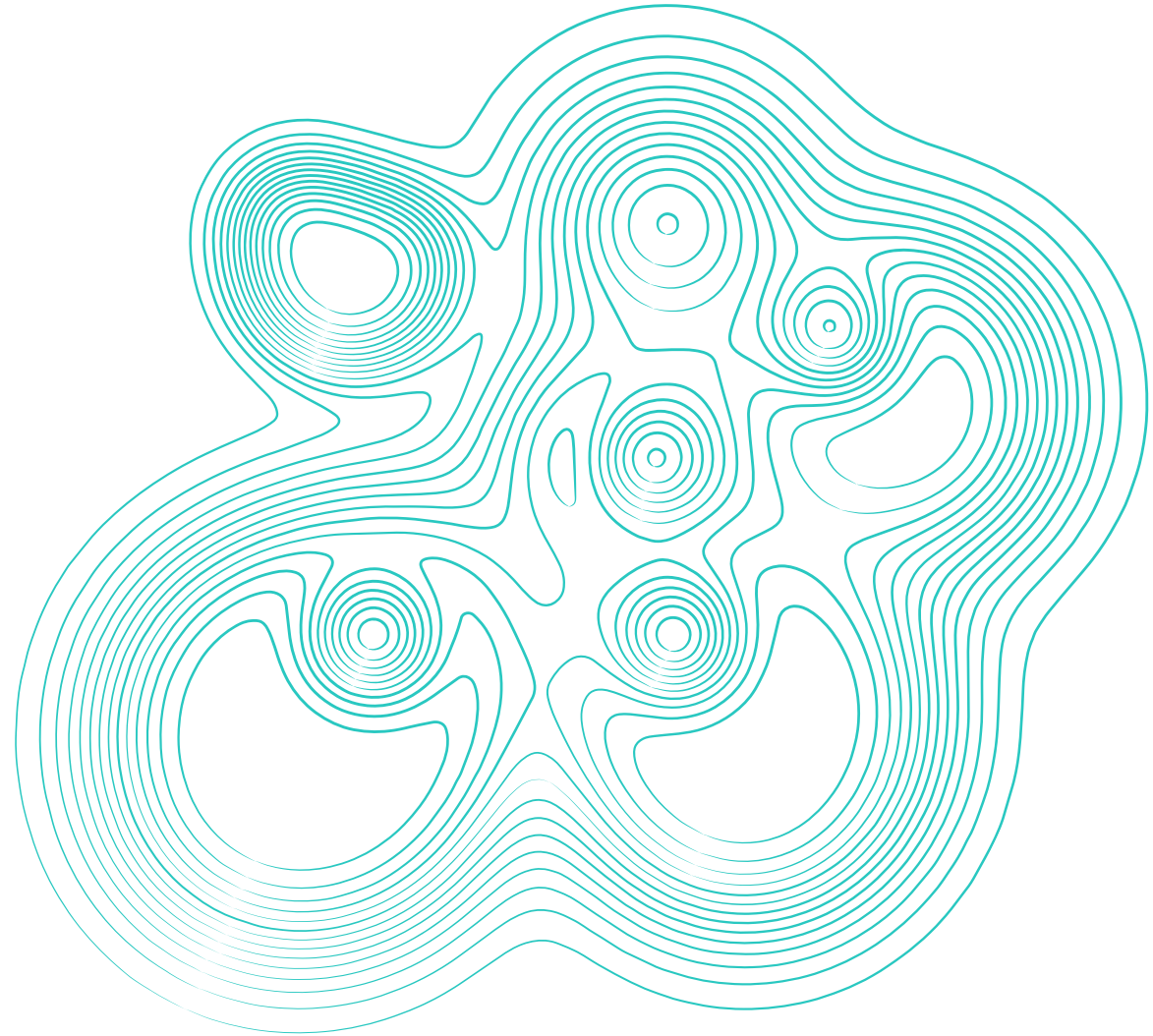
1. Navigate to **Setup** >**Admin**

2. Navigate to Users section and click **Invite User**

3. Add **First Name**, **Last Name** and **Email**

4. Tick/Untick Permissions and select customer Name

5. Click **Send Invitation**

Coupa Supplier Portal | Admin Setup

B. Merge Requests

This is intended for companies with multiple accounts to help minimize confusion for both existing and potential customers.

1. Navigate to **Setup** tab

2. Click **Merge Requests**

3. Enter **Email** and Click **Request Merge**

4. On the opening popup window, Choose who will become the Account owner.

5. Add **Note to Recipient** and verify Captcha

6. Click **Send Request**

Coupa Supplier Portal | Admin

B.1 Respond to Merge Account Request

1. From **Admin** page, select **Merge Requests**

2. Navigate to Open Merge Requests and Click **Respond**

3. When the popup window opens, either accept or reject the request

Open merge requests

| Requested 06/20/24 | XQuared Roofing Materials v6
Seafood St

New York 4029

United States | Initiated From Other Company | **2** Respond |

When you choose either your account or the other account as the account owner, the Coupa Supplier Portal displays a visual overview of data ownership following a merge.

Merging accounts is a permanent action and cannot be reversed. Please proceed with caution and ensure that the account you're merging with belongs to your organization.

Merge Request

April Micah Esteron of XQuared Roofing Materials v6 has requested to merge with your Coupa Supplier Portal account. By accepting this request, the administrator of XQuared Roofing Materials v6 will become the new account owner.

My Account
- My users
- My customers
- My payment information
- My public profile

Their Account
- Their users
- Their customers
- Their payment information
- Their public profile

Merged Account

As the account owner, they will administer
- All combined users
- All combined customers
- All combined payment information

I will administer only
- My users
- My customers
- My payment information

The merged account will use
- Their public profile

Users with access to merged account   April Micah Esteron (xquaredroofing+12@gmail.com)

Note from requester   A

Add note for requester

☐ I recognize the email address above as a coworker at my company, and I agree to merge

⚠ Merging will join the accounts and give all combined users the ability to invoice and submit payment information to linked customers on behalf of your company. Only accept this request if you confirm this user is part of your organization. Once approved, an account merge cannot be undone. Learn more about merging accounts.

Cancel   **Reject** **3**   Accept

Coupa Supplier Portal | Admin Setup

C. Fiscal Representatives

Add the necessary fiscal representatives if you operate in a country or region where you are not legally registered but require representation for tax purposes.

C.1 Add a Fiscal Representative

1. Navigate to **Setup** > **Admin** > **Fiscal Representatives**.

2. Select **Add Fiscal Representative**.

3. In the window that appears, fill in at least the mandatory address fields marked with a red asterisk: address line 1, city, postal code, country/region, and VAT ID.

4. Select **Continue**.

Coupa Supplier Portal | Admin Setup

C.2 Edit or Deactivate a Fiscal Representative

1. Navigate to **Setup** > **Admin** > **Fiscal Representatives**.

2. Select **Manage** next to the fiscal representative you want to modify or deactivate.
   You can modify the Contact fields. To change the other fields, create a new fiscal representative.

3. Select **Deactivate** to deactivate the fiscal representative or modify the fields you want to change and select **Continue**.

COUPA SUPPLIER INFORMATION MANAGEMENT (SIM)

1. Invitations

Coupa Supplier Information | 3 Ways to Respond

Direct SIM Invitation	CSP Linked Update	Forwarded Invitation from a Coworker
Worley will send a customized onboarding email and SIM form to the supplier, allowing them to register through the Coupa Supplier Portal and complete the creation and validation of their supplier information	Suppliers should set up their accounts in advance. Once Worley requests an information update, you will be able to respond using your existing CSP Account.	Suppliers can forward the invitation to others within their organization to assist with completing the Supplier information update.

The Worley Invitation

When joining the Worley supplier network in Coupa, an invitation and request for information will be sent to the primary contact on file.

If you are new to Coupa: Select the Join & Respond button within the invitation to create your supplier portal account.
If you are already on Coupa: You will receive notification to login to continue

New to Coupa (Start At Step 1)	Already In Coupa (Start at Step 10)

COUPA SUPPLIER INFORMATION MANAGEMENT

2. Supplier Information Management

New to Coupa | Supplier Information Management - Invitation

1. Select Join and Respond from the Worley invitation.

2. Suppliers will then be redirected to Coupa Supplier Portal to complete their profile.

   To continue you will need the following information types**:
   - Tax Certifications
   - Banking Information
   - Company Addresses

3. If you need to forward to another person in your company, select "forward to someone" .

**Coupa takes your data security seriously, if you would like to read more about the compliance and security measures click here

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Profile Information Request

Hello Supplier,

Worley Limited wants you to respond by updating your company profile on Coupa, their chosen platform for Spend Management. This information is required so they can transact with you electronically.

Coupa's Supplier Portal is completely free, setup is fast, and it helps you better transact and communicate electronically.

You can easily update your company information if it ever changes, as well as do things with (and your other buying organizations that use Coupa) like view purchase orders, create invoices, manage POs and invoices, get real-time SMS alerts, and much more.

To forward this invitation, please select 'Join and Respond' and select 'Forward this to someone' in the account creation page.
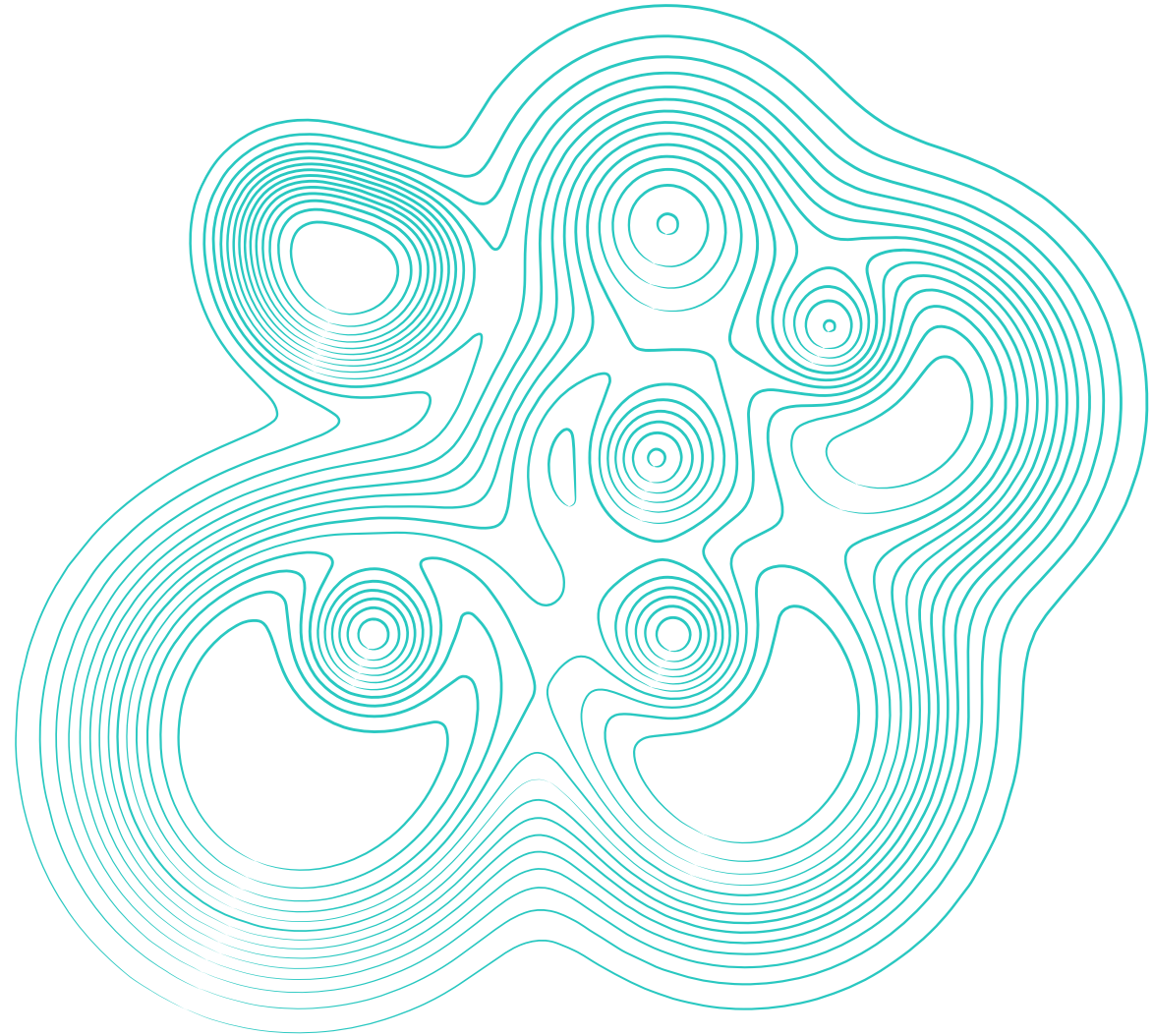
Welcome!

Join and Respond

Create an Account

Worley Limited is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with Worley Limited so you're ready to do business together.

* Business Name
Nikki Consulting Services
Your legal business name (or legal personal name if an individual)

* Email
Nikki.biersdorfer+NewAccount@gmail.com

* First Name   * Last Name
Nikki   Biersdorfer

* Password   * Confirm Password

Use at least 8 characters and include a number and a letter.

* Country/Region   * Tax Registration (i)
                      #########
☐ I do not have a Tax ID

☐ I accept the Privacy Policy and the Terms of Use

Create an Account

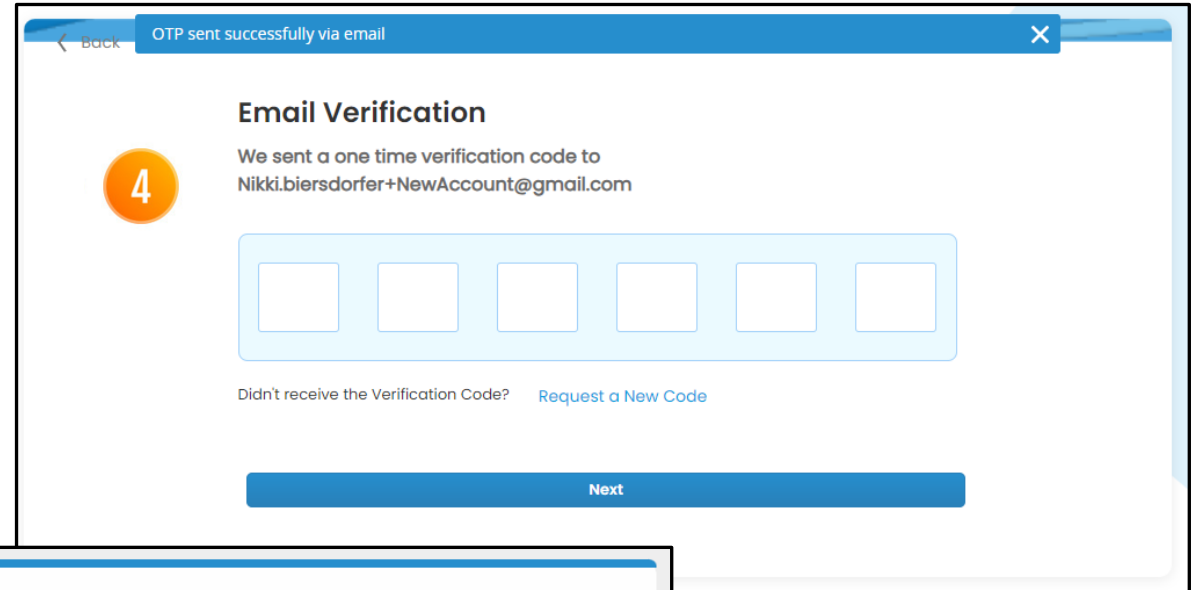Already have an account? LOG IN

Forward this to someone

Click here for:
Potential Supplier Information Fields
(expected to be entered by suppliers)

New to Coupa | Supplier Information Management - Invitation

4. After clicking Create an Account, a verification code will need to be entered.

5. You will receive an email for a verification code (this confirmed the email entered is correct).
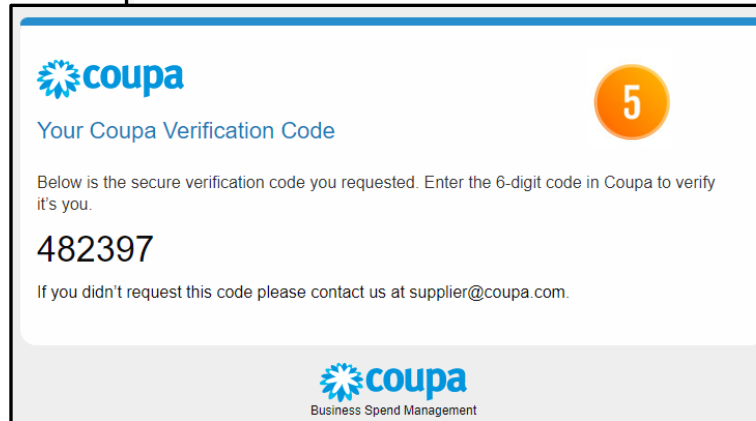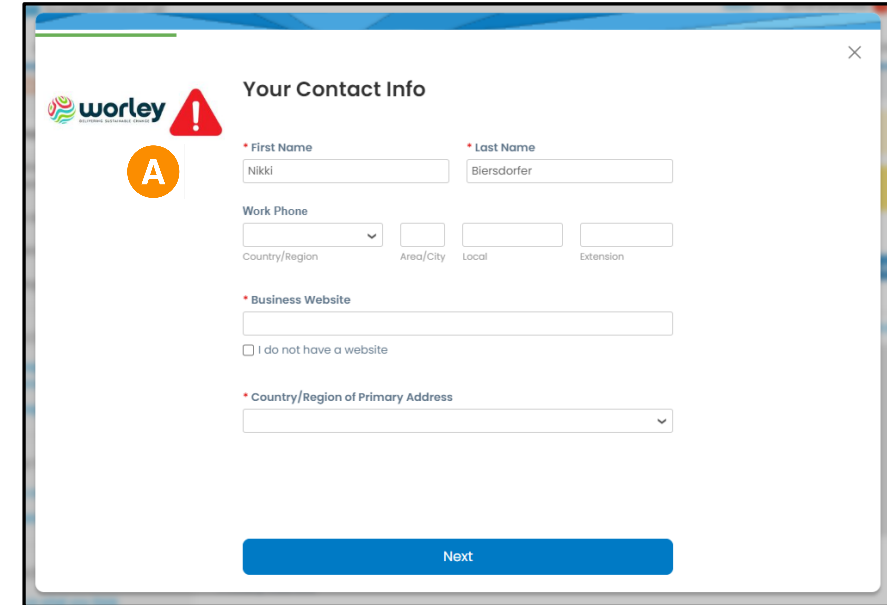
New to Coupa | Supplier Information Management - Invitation

6. Coupa will ask you for CSP (Coupa Supplier Portal) Account Information.

    A. Contact Information will be first and this is required (once completed here, it will also default on your supplier information form for the Worley onboarding process).

    B. Additional sections such as 'Making sure you get paid' will appear and are optional if you choose the "skip for now" option.

New to Coupa | Supplier Information Management - Invitation

7. At the top left, you will see the word Notifications, click here.

8. Under My notifications you will have an invitation to connect with Worley, if you click on the word Notifications, you will see the most recent notification. From here if you select the Worley invitation, you will be directed to the form. It is here you will start answering questions that are applicable to your company.

9. If you do not see the Worley notification in recent list, select the 'See All Notifications' and you will be directed to all notifications – once you have located the Worley notification select the message to be directed to the form.

10. This supplier information request is also accessible through your Coupa Supplier Portal.

   A. Select Profile

   B. Select Information Requests

   C. Confirm Worley is the Profile Selected

11. Fields with a * are required. Also, there will be conditional fields that will appear as needed based on your answers.

   D. The next section of this deck will outline all the fields included on the forms.

TIP: This form will automatically populate information from your Coupa supplier profile. You can review and update the fields as needed to ensure accuracy.

New to Coupa | Supplier Information Management - Invitation

12. Once you have completed the form, select the **Submit for Approval** button.

13. **If you have any missing required fields, you will receive a red error bar. The missing or incorrect fields will also turn red, giving you direction on where/ what information is missing or needs to be addressed.

New to Coupa | Supplier Information Management - Invitation

14. After you select 'Submit for approval', a green bar will appear, indicating that your form has been successfully submitted to Worley for review.

15. Upon submission, you will also receive an email confirmation that your supplier information has been successfully submitted for review.

16. Once Worley has completed its internal approval, you will receive an email notification confirming that your information has been accepted for review.

COUPA SUPPLIER INFORMATION MANAGEMENT

3. SIM Field Details

Fields| Supplier Information Management

*Fields with a * are required, and there will be some questions that will appear based on response conditions and are designated by (C).*

Fields – Supplier Profile Form

- **Supplier Location***
- **Company Name* Please type in ALL CAPS**
- Company Trading Name
- **Tax Registration***
  - **Country***
  - **VAT ID***
- **Company Identification Number***
- **Permanent Account Number (PAN) – India only (C)**
- **RUT Number (RUT) – Chile Only (C)**
- **RUC Number (RUC) – Peru Only (C)**
- **Date Established***
- **Proof of Company Registration* (A)**
- DUNS Number
- **Primary Address (Region/Address)***
- **SIM – Primary Contact (Name/Contact Information)***
- Additional Contacts (if you choose to add, the following fields are required)
- Website
- Parent Company Legal Name
- **Preferred Communication Language***

What is your company's legal structure or Organization type?*

Company Registration Type*

Shareholder Details **(A)**
  - Download "Shareholder Details" spreadsheet, Fill Out and Upload back

Other Registration Type

Company Type*

Default Commodity*

How much is your annual or budgeted spend (USD)?*

What are your other Business Activities?*

Company Brochure **(A)**

Licenses and Permits **(A)**

Sectors* (where capable of providing services, goods and materials, products or works)

Countries where products/services provided*

Countries, where regulated by a government agency* (Select the countries where your company is regulated by a government agency (if none select N/A))

* Mandatory Field   **(A) = Attachment Field**   **(C) = Conditional Field**

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Fields| Supplier Information Management

*Fields with a * are required, and there will be some questions that will appear based on response conditions and are designated by (C).*

Fields – Supplier Profile Form

- **Countries where subject to regulatory oversight***Select the countries where your company is subject to regulatory oversight (if none select N/A)
- **Total number of employees***
- **Principal Customer & Percentage of Turnover*** **(A)**

Diversity
- **Are you identified as a diverse Supplier***
- **Supplier Diversity (C)***
  - Country **(C)**
  - Diversity Category **(C)**
  - Diversity Subcategory **(C)**
  - Agency **(C)**
  - Effective Date **(C)**
  - Expiry Date **(C)**
  - Diversity Ownership Attachment **(C)(A)**
- **Diversity Ownership Percentage**

- **Is your diversity type as "Native/Indigenous Owned"?*** **(C)**
  - **Identify Indigenous Ownership Type*** **(C)**
  - **Percent of Indigenous Ownership*** **(C)**
  - **Indigenous Community*** **(C)**
  - **Location and Territory of Indigenous*** **(C)***

* Mandatory Field   **(A) = Attachment Field**   **(C) = Conditional Field**

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Fields| Supplier Information Management

*Fields with a * are required, and there will be some questions that will appear based on response conditions and are designated by (C).*

Banking Details

Name and address of the payments.

*Remit-To Addresses

Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.

[Add Remit-To]

* Is Freight Terms applicable/not applicable?

[Select ∨]

* Is tax applicable/not applicable?

[Select ∨]

* Is Withholding tax/ TDS (WHT/TDS) applicable?

[Select ∨]

* Will the company be handling, processing, or storing data/information pertaining to Worley's: employee HR identities (e.g. passports, driving licenses, ID cards, visas, payslips, social security numbers, medical data, credit card data), or personal data of our customers and business partners?

[∨]

*Coupa requires you to add your remit to, to your CSP Account, if you do not have one already set up COUPA will prompt you to add at this time.

Fields – Supplier Profile

Banking Details
- **SIM Remit to***
    - **Remit to Email***
    - **Remit to Address***
    - **Supplier Payment Location***
    - **International /Domestic Bank***
    - **Bank Information***
        - Bank Details (Name/Address)
        - Account Currency
    - **Account Start Date***
    - **Account Payee Name***
- **Bank Account Numbers***
    - **Conditional by Country (i.e., IBAN/SWIFT/BSB etc.) (C)**
- **Banking support Document* (A)**
- **Payment Currency***

Banking Details (CONT)
- **Invoice Currency***
- Tax Registration
- Payment Method
- **Is Freight Terms applicable/not applicable?***
- **Freight Terms* (C)**
- Is Withholding tax/ TDS (WHT/TDS) applicable?

* Mandatory Field   (C) = Conditional Field   (A) = Attachment Field

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Fields| Supplier Information Management

Fields with a * are required, and there will be some questions that will appear based on response conditions and are designated by (C).

Fields – Supplier Profile

* **Personally Identifiable Information (PPI) handling***
  * Will the company be handling, processing, or storing data/information pertaining to Worley's: employee HR identities (e.g. passports, driving licenses, ID cards, visas, payslips, social security numbers, medical data, credit card data), or personal data of our customers and business partners?

* **Confidential Data handling***
  * Will the company be handling, processing, or storing data/information pertaining to Worley's confidential information, including but not limited to: sales, finance, project delivery activity; specific business initiatives, bidding strategies, audit findings, security logs, network diagrams and configurations; merger & acquisition plans; litigation cases; passwords and PIN codes, VPN tokens, or encryption keys?

* **Network Access***
  * Will the company's products/services require an IT connection to Worley's network/information systems?

* **Have you answered any of the previous three questions as "Yes"*** **(C)**
  * Is the Company currently accredited or certified in respect of its information security, cybersecurity, or data privacy practices? **(C)**
    * Is Company accredited with ISO/IEC 27001*
    * ISO/IEC 27001 Certificate **(A)**
    * Is Company accredited with ISO/IEC 27701*
    * ISO/IEC 27701 Certificate **(A)**
    * Is Company accredited with SOC1 Type II*
    * SOC1 Type II Certificate **(A)**
    * Is Company accredited with SOC2 Type II*
    * SOC2 Type II Certificate **(A)**
    * Is Company accredited with Cybervadis?*
    * Cybervadis Scorecard **(A)**

* Are AI systems used in the course of providing products/services to Worley?*

* Mandatory Field   **(C) = Conditional Field**   **(A) = Attachment Field**

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Fields| Supplier Information Management

*Fields with a * are required, and there will be some questions that will appear based on response conditions and are designated by (C).*

Fields – Supplier Profile

- **Do you or any of your owners, shareholders, directors, officers, or key employees have any relationship with Worley, its employees, or related parties?***
    - **Employee Relationship (A)**
- **Are you aware if any of the parent entities, shareholders, ultimate beneficial owners, subsidiaries, or key executives of the third party are sanctioned by any jurisdiction or have any connections with sanctioned entities or countries?***
- Will you interact with government officials on behalf of Worley?
- **Are any of the following raw materials contained in the supplier's products***
- **Does the supplier source the products or the raw materials from any of the following countries: North Korea, Eritrea, Mauritania, Saudi Arabia, Türkiye, Tajikistan, United Arab Emirates, Russia, Afghanistan, and Kuwait? ***
    - If Yes, please explain **(C)**
- **Does the supplier require use of any low skilled or migrant labor?***
    - **If the answer to the previous question (relating to low skilled or migrant labor) is yes, does the supplier rely on outsourcing through recruitment or labor hire agencies? If no, please select, not applicable.* (C)**
    - If the answer to either of the previous questions (relating to low skilled or migrant labor, and outsourcing) is 'Yes', please include the country from which the third party would be sourcing these workers **(C)**

* Mandatory Field   (C) = Conditional Field   (A) = Attachment Field

Fields| Supplier Information Management

Fields with a * are required, and there will be some questions that will appear based on response conditions and are designated by (C).


Fields – Supplier Profile

- **Will the landlord be engaging any cleaning, maintenance, security and/ or other support staff?***
- **Does the third party have an established process to conduct due diligence on its sub-contractors/suppliers to identify bribery, corruption and modern slavery red flags?***
    - **If the answer to the previous question (relating to due diligence) is not applicable, please explain. (C)**
- **Does the third party have a written policy addressing bribery, corruption, and other unethical business practices related risks?***
- **Does the third party have a written policy addressing modern slavery and human rights related risks?***
- My company has a privacy policy in place and complies with applicable privacy regulations.

_____

- Non-disclosure and confidentiality agreement – *check box if you agree*
- Worley Code of Conduct - *check box if you agree*
- Supply Chain Code of Conduct - *check box if you agree*
- If you do not acknowledge any of the fields above, please provide your company's policies. **(A)**
- The following fields are available if the supplier selects United Kingdom on the supplier location (CIS Status, Unique Tax Reference, NI/Company registration and CIS Name)
- **Does this form correspond to an update?***
    - Note: If you are completing this form for the first time, please select   "No". If you are updating an existing profile, select "yes"
- **Which of the following areas require an update? (C)**

* Mandatory Field   (C) = Conditional Field   (A) = Attachment Field 45

COUPA RISK ASSESS (CRA)

1.Evaluation Invitations
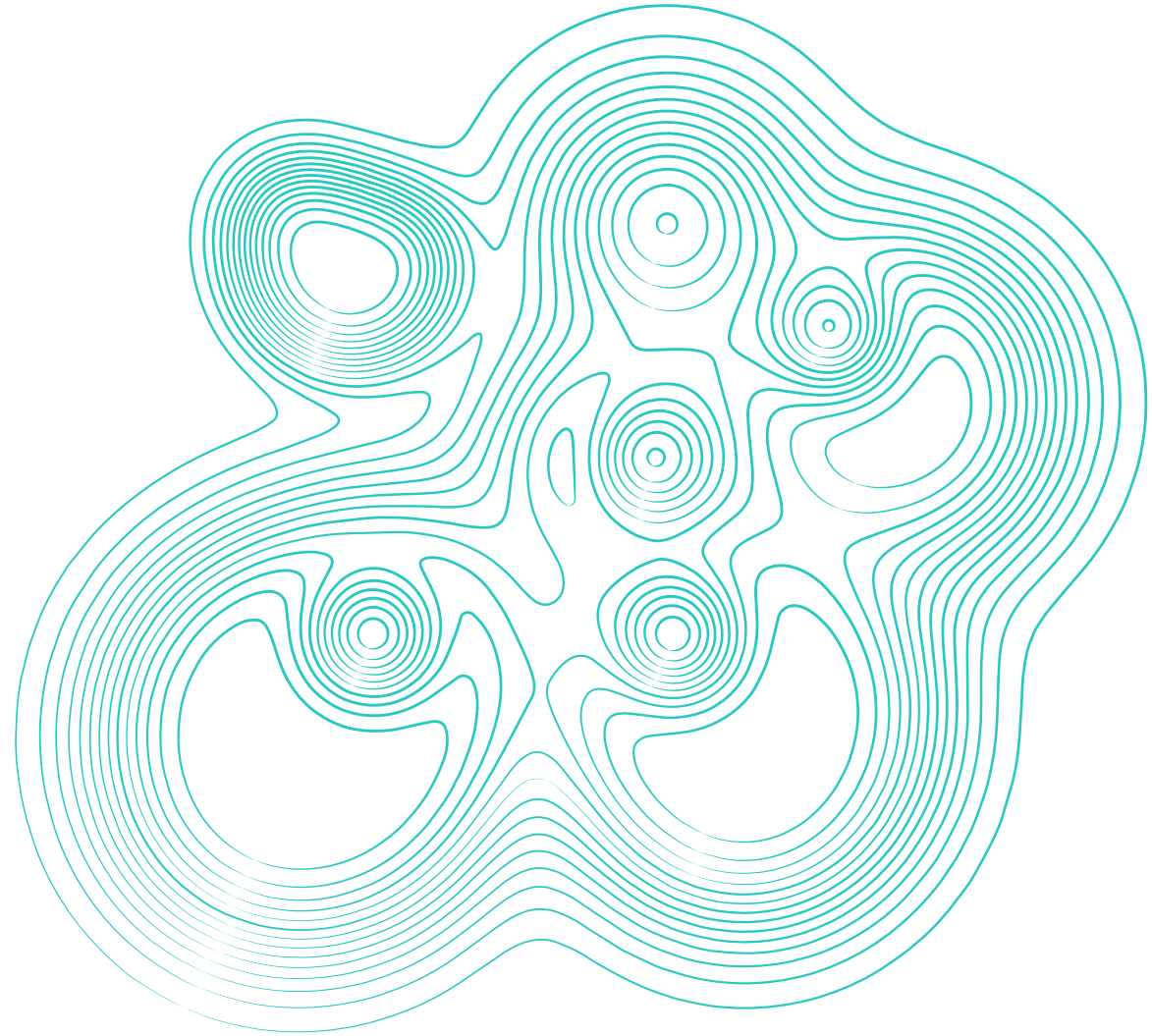
New to Coupa | Coupa Risk Assess (CRA) - Evaluation Invitations

1. Based on the type of work your company will be performing for Worley, you may receive the following email from Coupa. This is an invitation to you to create a Coupa Risk Assess (CRA) account, this to complete supplier evaluations to be added to the Approved Supplier List.

2. After your initial email you will receive an authentication code, which is required for you to start the process.

1

A Coupa Risk Assess account has been created for you

Dear **Nikki Test Supplier**,

A Coupa Risk Assess account has been created for you.

Your Username is: **worley.cra.uat+nikki@gmail.com**
Please use the link below and the authentication code provided in a separate email with the subject "Your Coupa Risk Assess authentication code" to login to Coupa Risk Assess.

https://worleyonesource-test.risk.coupahost.com/External/_si7314?xS=
bjX0Q4AV69TBlWSJOMfUrGe%2FyKaSsfRLwOllJRheXbLLFYz1r%
2FZC4zxUz7LFnGovjHpBm2pHUyraiNVRXOF6VzsLqFwqHt9BLoAEm6mFtnjO
DRe1BvljWSQeky5g%2BOtiQyklWsvAkb5CBRs%2FhQZS%
2F%2BR0pSLvCM3u53MPw4%2Frvt%2FhNS8ua1Q7u4mUipYEp4nmSGNVXBFqMa4%3D

If you have any questions please contact your administrator at mario.faria@worley.com.

Thank you for using Coupa Risk Assess!
The Coupa Risk Assess Team

This email was intended for Nikki Test Supplier

Coupa Risk Assess - Disclaimer
This communication and any files or attachments transmitted with it may co...
disclosure under applicable law. It is intended solely for the use of the indivi...
you are hereby notified that any use, dissemination, or copying of this comm...
error, please notify us here so that we may take the appropriate action.

Your Coupa Risk Assess authentication code

Dear **Nikki Test Supplier**,

Enclosed is the authentication code needed to login to the Coupa Risk Assess system.

Your authentication code is: 18D01A73s4S2b

A link to login was sent to you in a separate email. Please refer to that email for instructions on using your authentication code to login to your Coupa Risk Assess account.

If you have any questions please contact your administrator at mario.faria@worley.com.
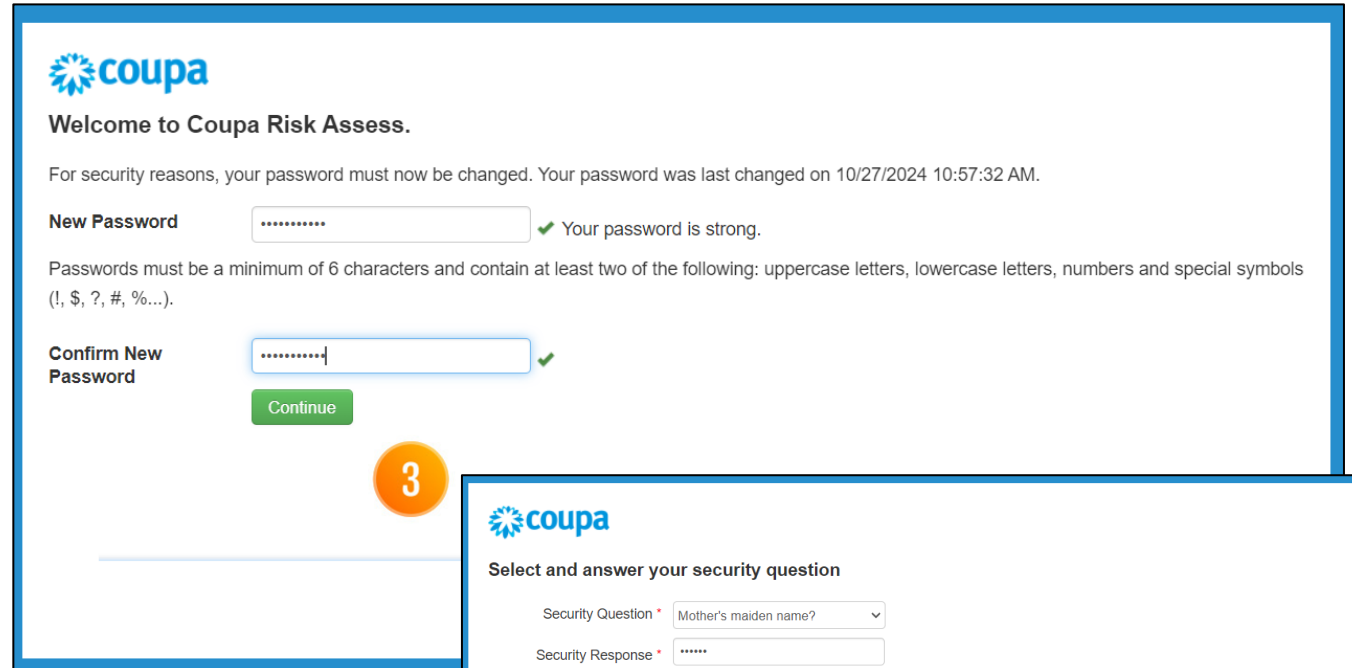
Thank you for using Coupa Risk Assess!
The Coupa Risk Assess Team

This email was intended for Nikki Test Supplier .

Coupa Risk Assess - Disclaimer
This communication and any files or attachments transmitted with it may contain information that is confidential, privileged, and exempt from disclosure under applicable law. It is intended solely for the use of the individual or entity to which it is addressed. If you are not the intended recipient, you are hereby notified that any use, dissemination, or copying of this communication is strictly prohibited. If you have received this communication in error, please notify us here so that we may take the appropriate action.

2

3. CRA will first ask you to create a Security Question and answer (for identification purposes if needed) and a password.

4. After confirming your password, you will be taken to a terms of use page, to agree to the terms of use for your new CRA Account.

Welcome to Coupa Risk Assess.

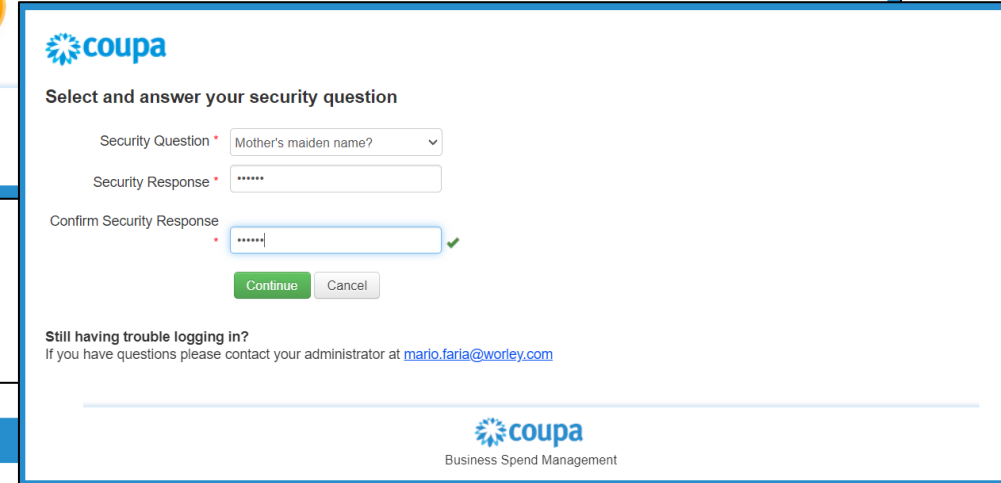For security reasons, your password must now be changed. Your password was last changed on 10/27/2024 10:57:32 AM.

New Password [●●●●●●●●●●] ✔ Your password is strong.

Passwords must be a minimum of 6 characters and contain at least two of the following: uppercase letters, lowercase letters, numbers and special symbols (!, $, ?, #, %...).

Confirm New Password [●●●●●●●●●●] ✔

[Continue]

3

Select and answer your security question

Security Question * [Mother's maiden name?]
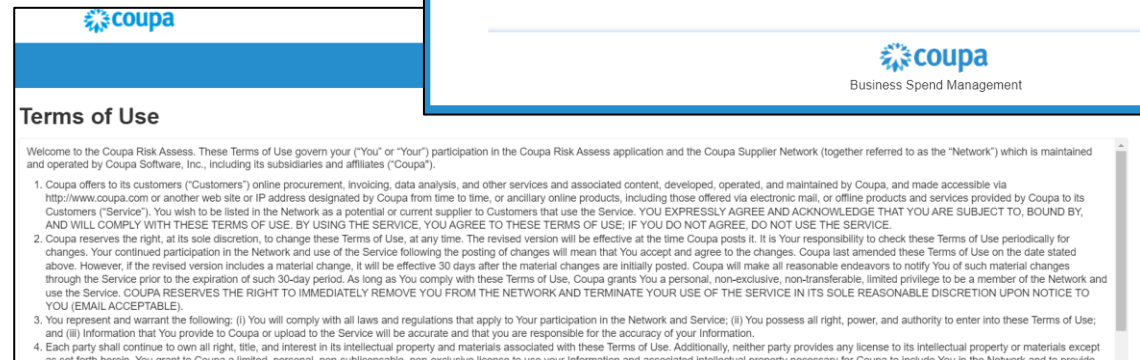
Security Response * [●●●●●●]

Confirm Security Response * [●●●●●●] ✔

[Continue] [Cancel]

Still having trouble logging in?
If you have questions please contact your administrator at mario.faria@worley.com

coupa
Business Spend Management

4

Terms of Use

Welcome to the Coupa Risk Assess. These Terms of Use govern your ("You" or "Your") participation in the Coupa Risk Assess application and the Coupa Supplier Network (together referred to as the "Network") which is maintained and operated by Coupa Software, Inc., including its subsidiaries and affiliates ("Coupa").

1. Coupa offers to its customers ("Customers") online procurement, invoicing, data analysis, and other services and associated content, developed, operated, and maintained by Coupa, and made accessible via http://www.coupa.com or another web site or IP address designated by Coupa from time to time, or ancillary online products, including those offered via electronic mail, or offline products and services provided by Coupa to its Customers ("Service"). You wish to be listed in the Network as a potential or current supplier to Customers that use the Service. YOU EXPRESSLY AGREE AND ACKNOWLEDGE THAT YOU ARE SUBJECT TO, BOUND BY, AND WILL COMPLY WITH THESE TERMS OF USE. BY USING THE SERVICE, YOU AGREE TO THESE TERMS OF USE; IF YOU DO NOT AGREE, DO NOT USE THE SERVICE.
2. Coupa reserves the right, at its sole discretion, to change these Terms of Use, at any time. The revised version will be effective at the time Coupa posts it. It is Your responsibility to check these Terms of Use periodically for changes. Your continued participation in the Network and use of the Service following the posting of changes will mean that You accept and agree to the changes. Coupa last amended these Terms of Use on the date stated above. However, if the revised version includes a material change, it will be effective 30 days after the material changes are initially posted. Coupa will make all reasonable endeavors to notify You of such material changes through the Service prior to the expiration of such 30-day period. As long as You comply with these Terms of Use, Coupa grants You a personal, non-exclusive, non-transferable, limited privilege to be a member of the Network and use the Service. COUPA RESERVES THE RIGHT TO IMMEDIATELY REMOVE YOU FROM THE NETWORK AND TERMINATE YOUR USE OF THE SERVICE IN ITS SOLE REASONABLE DISCRETION UPON NOTICE TO YOU (EMAIL ACCEPTABLE).
3. You represent and warrant the following: (i) You will comply with all laws and regulations that apply to Your participation in the Network and Service; (ii) You possess all right, power, and authority to enter into these Terms of Use; and (iii) Information that You provide to Coupa or upload to the Service will be accurate and that you are responsible for the accuracy of your Information.
4. Each party shall continue to own all right, title, and interest in its intellectual property and materials associated with these Terms of Use. Additionally, neither party provides any license to its intellectual property or materials except as set forth herein. You grant to Coupa a limited, personal, non-sublicensable, non-exclusive license to use your Information and associated intellectual property necessary for Coupa to include You in the Network and to provide

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New to Coupa | Coupa Risk Assess (CRA)- Evaluation Invitations

5. Once logged in, you will see the dashboard and can select the evaluation square.
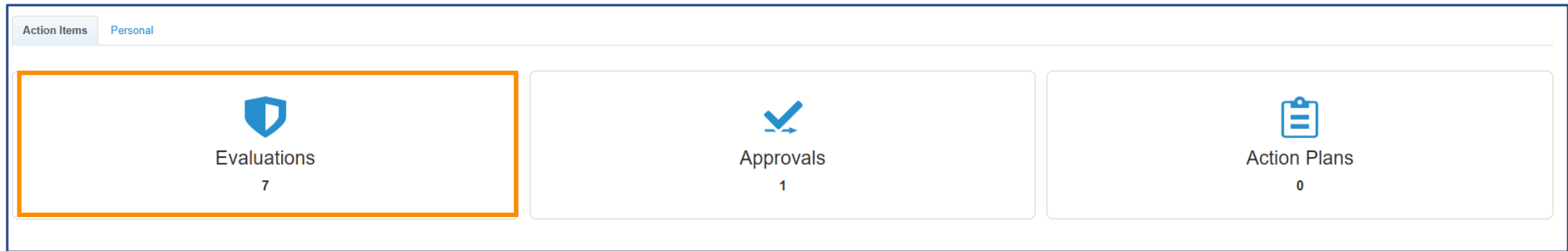
New to Coupa | Coupa Risk Assess (CRA)- Evaluation Invitations

6. When ready to begin, click 'View' (tip: you can start now and save your progress to return later).

New to Coupa | Coupa Risk Assess (CRA) - Evaluation Invitations

7. Once you have started the evaluations:

    a. Questions marked with an asterisk * are required.
    b. Some answers will trigger conditional questions to appear as needed.
    c. There are some questions that have areas to load attachments (some are required).
        • To remove if needed, select the trash can (if applicable).

New to Coupa | Coupa Risk Assess (CRA)- Evaluation Invitations

8. After completing, click **SAVE & SUBMIT**

9. For each evaluation submission you will be required to accept to confirm all information entered is valid.

10. The CRA will validate – please be patient. Leaving this validation page too soon may cause errors.

11. If you have missed any important information – CRA will highlight what was missed and you will need to complete before you try resubmission. It notes the item# that is missing information to make it easy to find (each # is also a link and will take you to the question requiring action).

New to Coupa | Coupa Risk Assess (CRA)- Evaluation Invitations

12. Once you have started an evaluation, if you save and exit, your evaluation will move the approval section and change to **WAITING.**

13. After successfully submitting the evaluation, it will be removed from the home page but can still be accessed under '**Closed Evaluations**'.
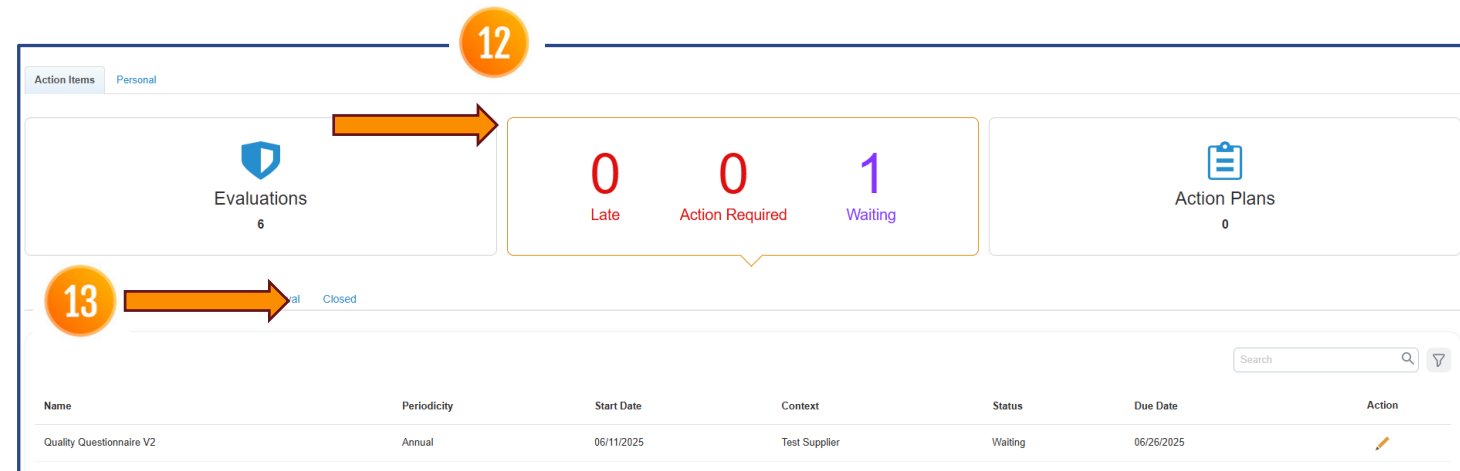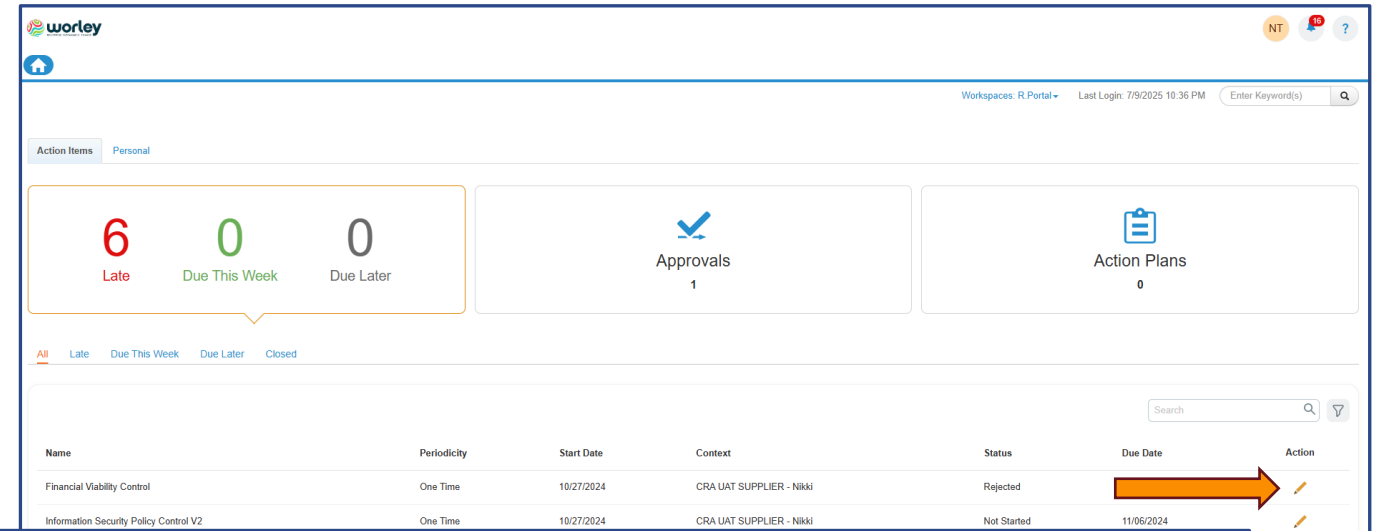
New to Coupa | Coupa Risk Assess (CRA)- Evaluation Invitations

If another person in your company is responsible for completing any or all these evaluations, you can delegate them accordingly.
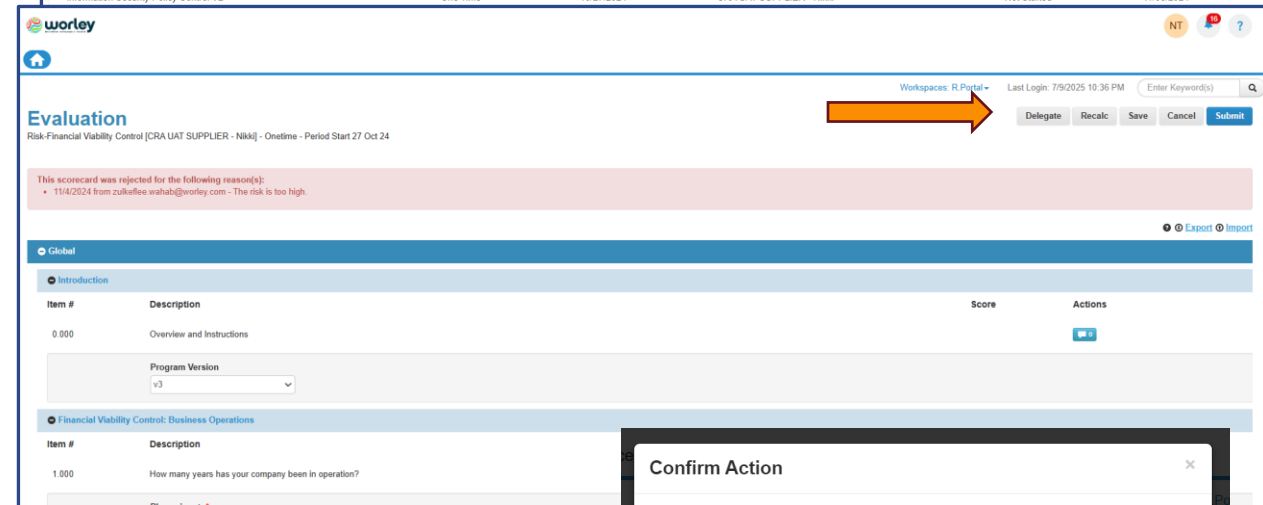
14. Select **View**

15. Once in the evaluation, select **delegate. You will need to confirm**

New to Coupa | Coupa Risk Assess (CRA) - Evaluation Invitations

16. You will be asked who you are delegating to. If this is your first time adding a delegate or if this person is a new delegate, you will have to add them to your account using the green ⊕

17. For Adding Users, you must include their email, first and last name. They will receive an email notification and will have to follow the CRA account set up steps to access the evaluation.
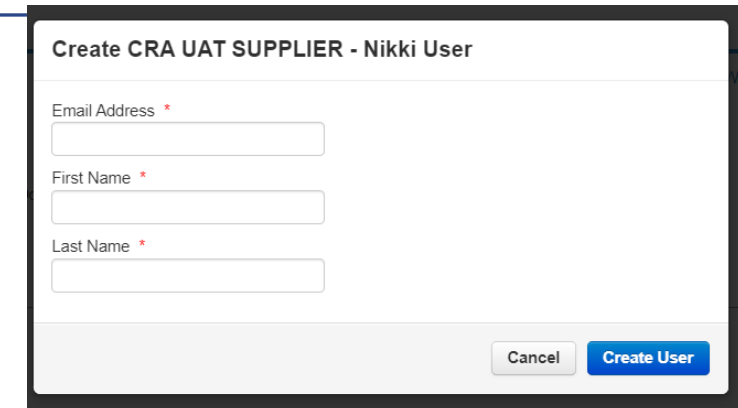
COUPA RISK ASSESS

2. Account Management
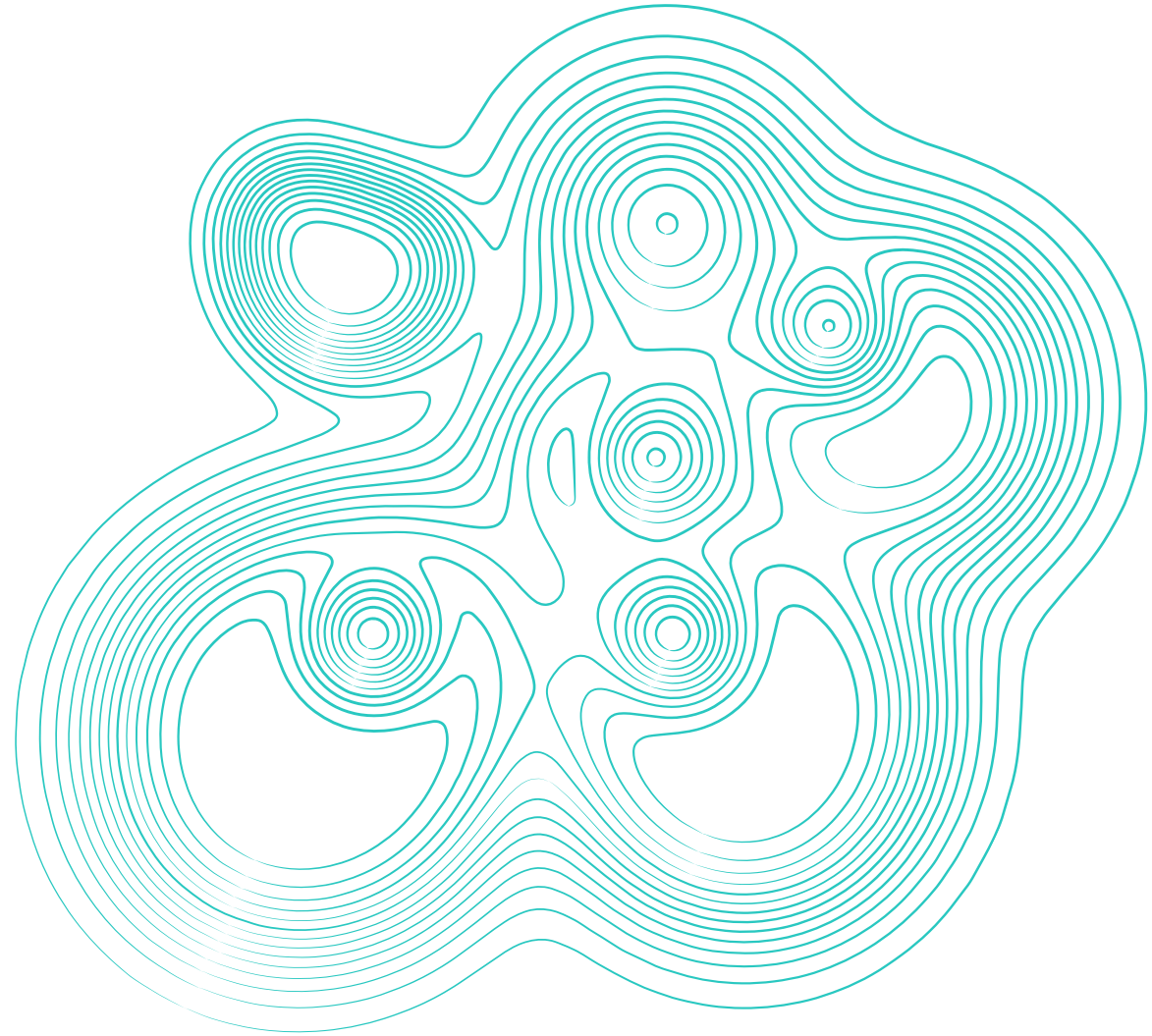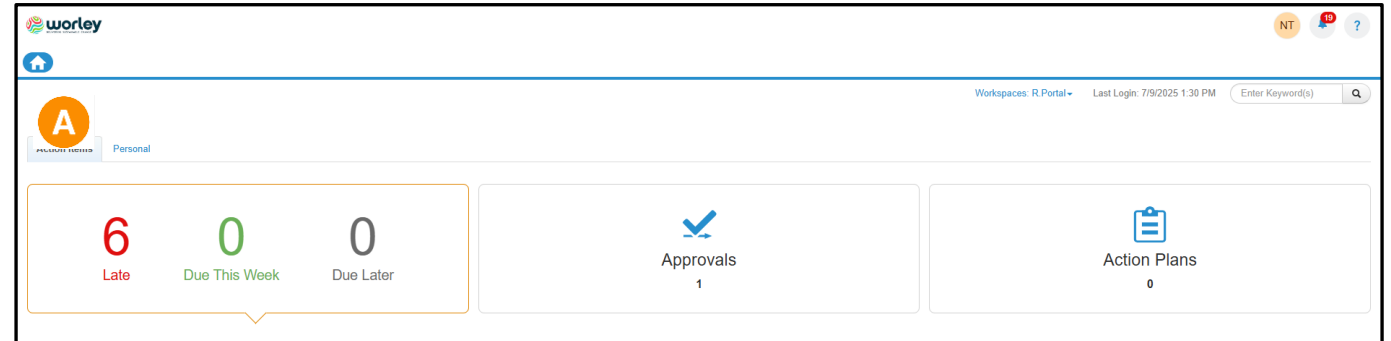
New to Coupa | Coupa Risk Assess (CRA) - Account Management

1. **Home Page Management**
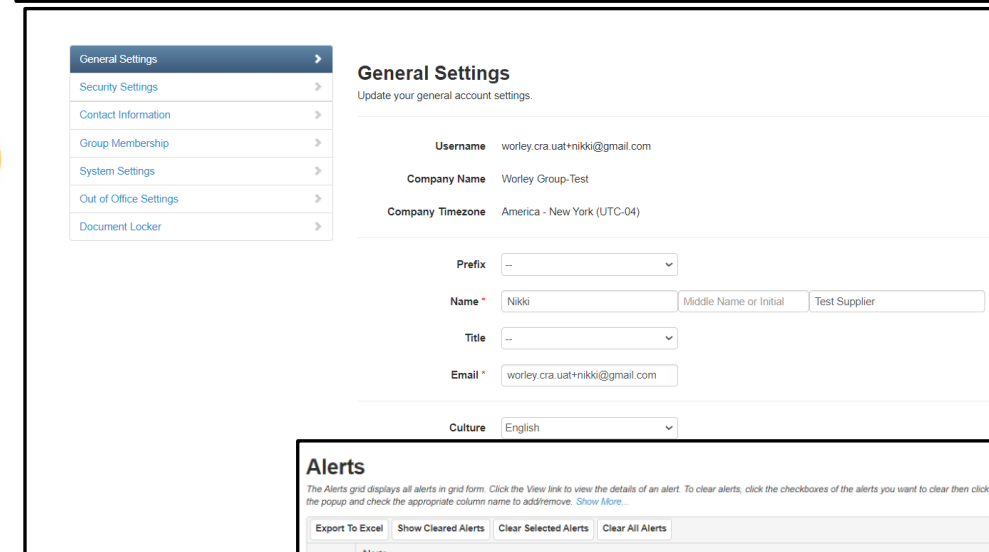
   a. Here is where you will find your evaluation history, and anything currently required.

   b. Alerts can be accessed by selecting the notification bell.

   c. Account Management can be accessed by clicking your initials.

2. **Account Management**: Once you select your initials you will be able to update and manage your account details.
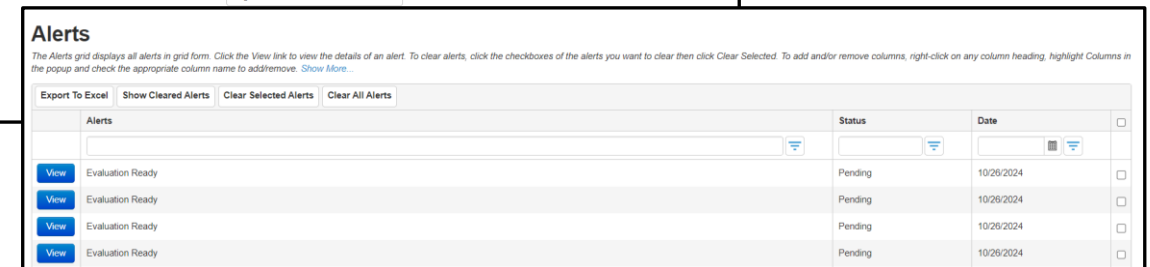
3. **Alert Access:** Once you click on the alert bell, you will see all alerts received.

COUPA RISK ASSESS

3. Resource Material
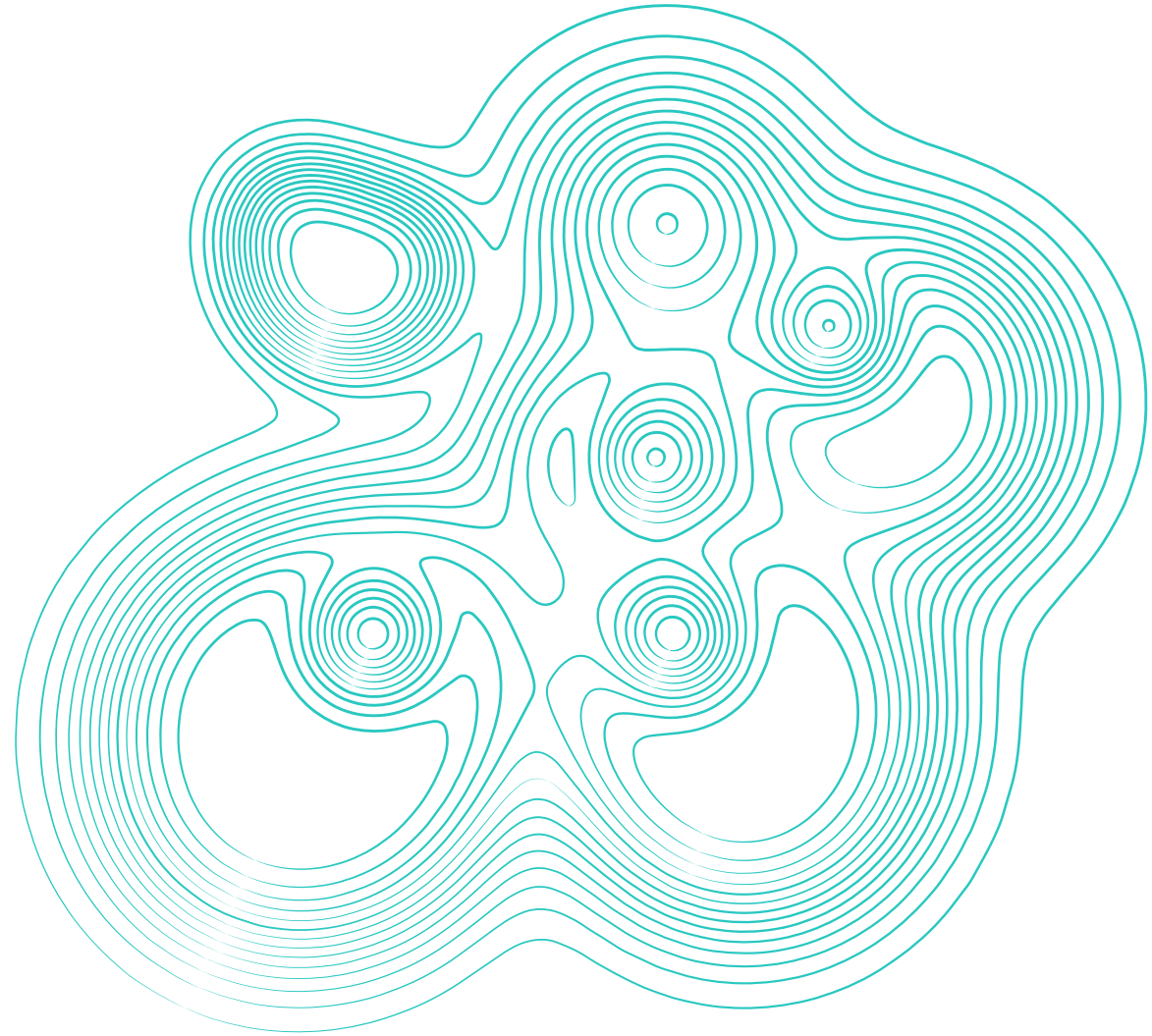
New to Coupa | Coupa Risk Assess (CRA)- CRA Resources

1. On the home page, click the Resources tab to access multiple links to Coupa-created resource materials.

1. Responding to Sourcing Events

Responding to Sourcing Events

1. A supplier is invited to participate in a sourcing event through an email notification sent by Worley.

   A. Create an account in the Coupa Supplier Portal by opening the notification email and click **here** to set up your log in credentials.

   B. You will then be prompted to LOGIN to the Coupa Supplier Portal, this login email will default from the email your sourcing event was sent to (do not change it).

Responding to Sourcing Events

2. Once logged in you will be directed to the Sourcing Tab – directly to your event.

Responding to Sourcing Events

3. On the Event info tab, acknowledge the event by indicating intent to participate in the event and accept the terms and conditions.

Click **Send to Event Owner**.

Responding to Sourcing Events

4. Scroll down to view event information & bidding rules, buyer attachments, and timeline. Click **Enter Response** to provide a response and submit a bid.

Responding to Sourcing Events

5. On the My Response tab, enter Response:
   a. **Attachments** – Check for provided attachments. A red asterisk next to attachment indicates a response is required.
   b. **Forms** – Complete any forms provided. Not all sourcing events include a form.

Responding to Sourcing Events

c. **Items and Services –** Scroll to the bottom of the My Response tab, review the list of items and/or services available for bidding. Enter your bid amount in the Price per Unit field-fields marked with a red asterisk are required.

Note: To include additional information, expand the line item by clicking the arrow above. In the expanded view, enter additional information and click **Save**.

Responding to Sourcing Events

If the Event contains several line items and/or if you want to answer the forms or questionnaires via Excel, click **Import from Excel**….

…then click download the Response Template to complete the item details and/or forms in an Excel spreadsheet.
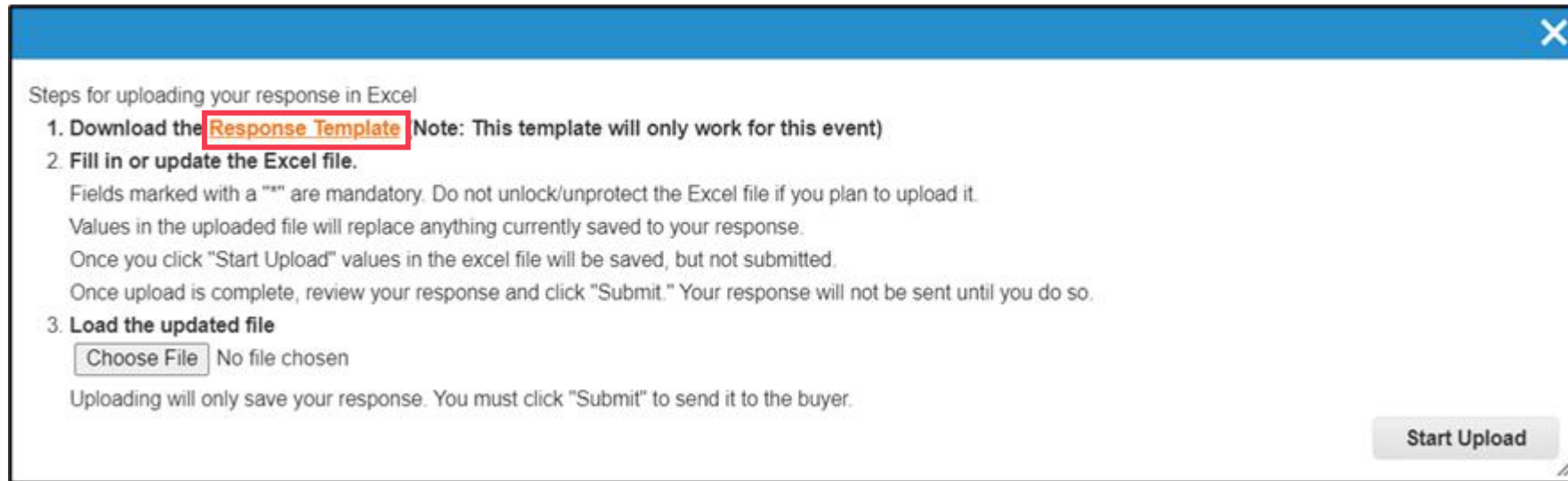
Responding to Sourcing Events

You have the option to fill out either '**Items and Services**' tab or '**Forms**' tab or both. The cells in yellow are the only ones that need to be populated, but some are not required.

In the **Forms** tab, the yellow cells in Column **H** are required to be filled out.

Responding to Sourcing Events

The table below summarizes the fields in the Items and Services tab, including which fields are required to be populated.

Field Name	Unit	Required?	Description
Capacity	Number	No	Indicates the number of items to bid. However, this cannot be more than the Expected Quantity (Number).
Unit Bid Price	Number	Yes	This is the Price Per Unit field where you will indicate how much you are bidding the item per quantity.
Bid Price Currency	Text	Yes	Select from the dropdown on which currency you'd like to bid on.
Lead Time	Integer	No	Lead time in Days - aims to support delivery time requirements by measuring the time it takes for a product to arrive at its end destination after an order has been placed. Populate only if applicable.
Supplier Item Name	Text	No	Name of item being bid on.
Item Part Number	Text	No	Each item may have its own item part number. Populate only if applicable.
Item Description	Text	No	Description of the item.

Responding to Sourcing Events

Once done, save the Excel file and click **Choose File** to load the spreadsheet. Click on **Start Upload** and a green banner showing "Excel import successful. Remember to submit your changes below." will appear.

Steps for uploading your response in Excel

1. Download the Response Template (Note: This template will only work for this event)
2. **Fill in or update the Excel file.**

   Fields marked with a "*" are mandatory. Do not unlock/unprotect the Excel file if you plan to upload it.

   Values in the uploaded file will replace anything currently saved to your response.

   Once you click "Start Upload" values in the excel file will be saved, but not submitted.

   Once upload is complete, review your response and click "Submit." Your response will not be sent until you do so.
3. **Load the updated file**

   Choose File   en#Worley-Event#69.xlsx
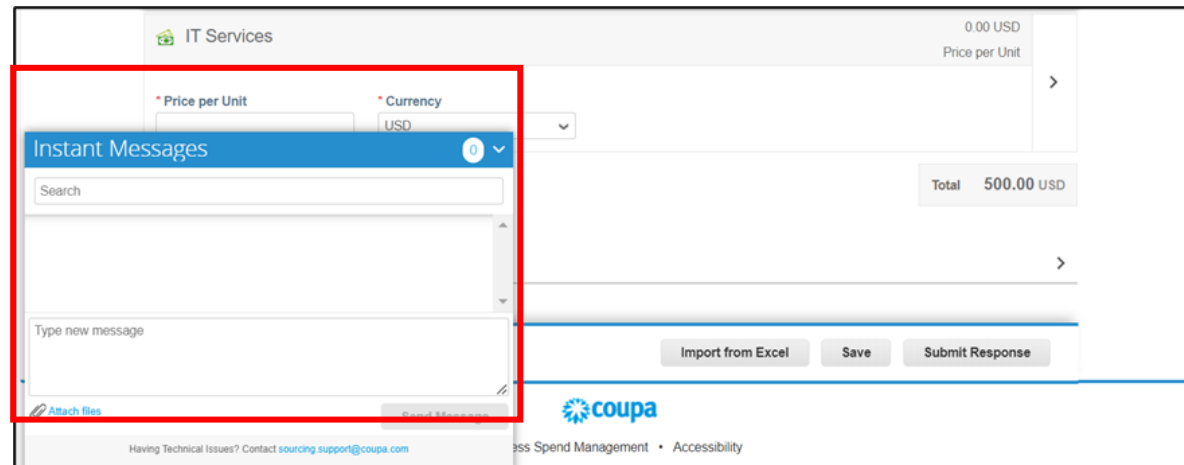
   Uploading will only save your response. You must click "Submit" to send it to the buyer.

   Start Upload

Responding to Sourcing Events

    d. Instant Messages Board – ask questions or request clarification from Worley while the event is open.

    Note: answering questions promptly through Coupa will reduce the need to call or email Worley. Additionally, the message board stores all questions and answers within the event for future reference and audit.

6. To submit the response, click **Submit Response**. Worley will receive a notification that the response was submitted.
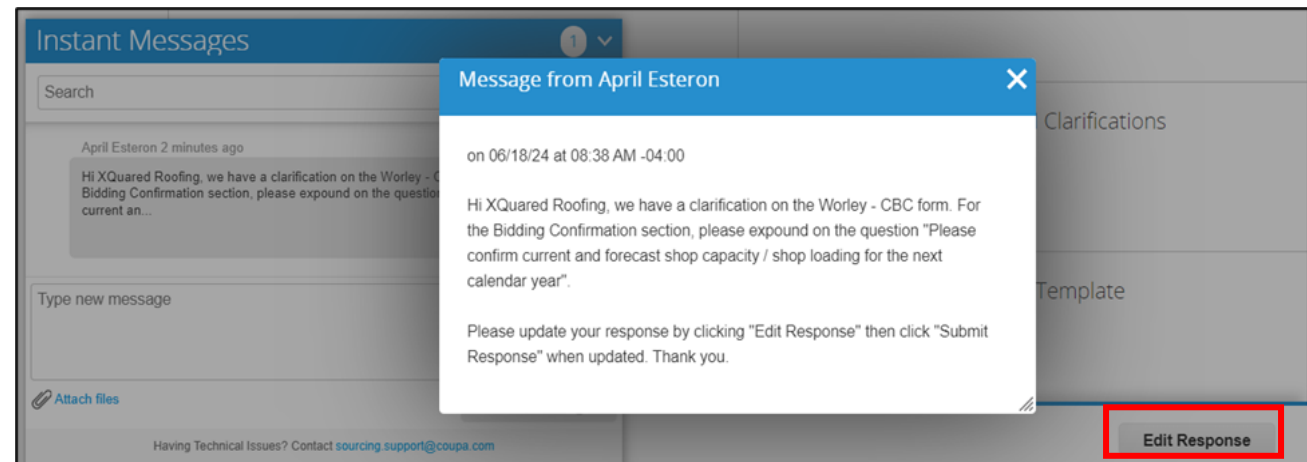
Responding to Sourcing Events

7.   Worley will review and evaluate supplier responses and follow up as required.
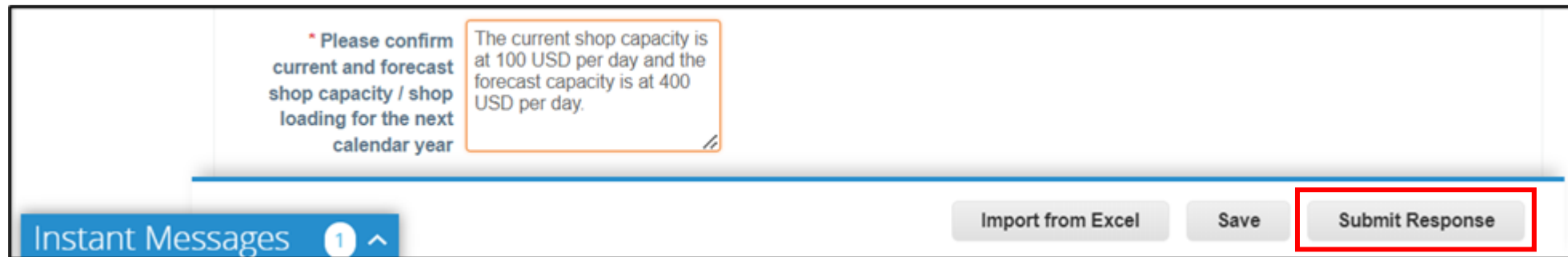See the event terms and conditions for any further information.

Note: How to reply to the Worley CBC (Commercial Bid Clarification) Form:
Should there be clarifications required on the form, please follow the steps below.

1. **Submit Response** as indicated in step #6 in previous slide (13). This will enable Worley buyers to see the supplier's response and review the Worley CBC form.
2. Worley buyer will send a message to the supplier via **Instant Messages** board. The supplier will then receive the message. If needed, attachments can also be sent both by the buyer and supplier.
3. Click on **Edit Response** to make changes on the form.

Responding to Sourcing Events

8. After editing the Worley CBC form, click '**Submit Response'** again to ensure it is received by the Worley buyer. Repeat this process as needed if further clarification is requested.

worley

DELIVERING SUSTAINABLE CHANGE