



# The Financial Times

## Coupa Supplier Portal User Guide



# Risk Assess Portal

# Risk Assess Portal - Initial Setup

# Coupa Risk Assess Portal - Initial Setup

Coupa Risk Assess is a tool that helps businesses manage third-party risk and improve supplier relationships. It offers several features, including:

- Automated risk detection: Supports monitoring of third-party risk
- Supplier onboarding: Helps speed up the process of onboarding suppliers
- Portal: Offers an intuitive portal
- Alerts: Alerts suppliers when they need to complete missing information

The screenshot displays the Coupa Risk Assess portal interface. At the top, a blue banner reads "Welcome to Coupa Risk Assess, your solution for third-party management." Below this is a "Sign In" section with input fields for "User name" and "Password", and links for "Forgot username?" and "Forgot password?". A "Sign In" button is positioned below the password field. To the right, there are two blue boxes: "COUPA BUSINESS SPEND MANAGEMENT" and "RESOURCES". The "COUPA BUSINESS SPEND MANAGEMENT" box contains text about the tool's benefits for organizations. The "RESOURCES" box features the Coupa University logo and a link to "Learn more at Coupa University".

Below the sign-in section, a navigation bar shows "Workspaces: R Portal" and "Last Login: 9/24/2024 11:11 AM". The main dashboard area is divided into three sections: "Evaluations:", "Approvals:", and "Action Plans:". Each section displays a large number representing the count of items, along with sub-counts for "Late", "Due This Week", "Action Required", "Waiting", "Not Started", "In Process", and "Awaiting Approval".

The "Evaluations: Due This Week" section includes a table with the following data:

Name	Periodicity	Start Date	Context	Status	Due Date	Action Status	Action
Data Protection	One Time	9/17/2024	Legal Supplier 1	Not Started	9/27/2024		<a href="#">View</a>

# Coupa Risk Assess Portal - Initial Setup

## Step 1

If we require suppliers to complete our Risk Assess process, automatic emails will be sent from the Coupa Risk Assess Portal directly to the supplier.

The first email will contain an authentication code required for your first login and for account creation.

The second email will contain a link that will direct you to creating your account within the Coupa Risk Assess Portal.

You will be asked to create a password for this account and also choose a security question and answer to protect your account.

### Your Coupa Risk Assess authentication code

Dear [REDACTED],

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

Your authentication code is: VWj3sQNgG

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 [coupa\\_admin@ft.com](mailto:coupa_admin@ft.com).

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

### A Coupa Risk Assess account has been created for you

Dear [REDACTED],

A Coupa Risk Assess account has been created for you.

Your Username is:

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://ft-staging.risk.coupahost.com/External/\\_si7314?xS=XYuHiKUCEpWqPDTdYMDTNBcz0l8dVS%2FWOHfdm%2BYvh%2BG%2F2lmo0Q22B2cPkDyYbDQL9Wz%2BEqxnN87zmZ0yOeF4Ekx3MlW0CowKvNKXkPHQF%2B0FtdRgZoxkFPJlWE9m%2FB1ct8wnU1OhFBs1u0ulztgXMtEmE8SU5rOPFmc5wvaQzKulJxMvVSD6H9yo0hZMRcuel%2BjHeU%3D](https://ft-staging.risk.coupahost.com/External/_si7314?xS=XYuHiKUCEpWqPDTdYMDTNBcz0l8dVS%2FWOHfdm%2BYvh%2BG%2F2lmo0Q22B2cPkDyYbDQL9Wz%2BEqxnN87zmZ0yOeF4Ekx3MlW0CowKvNKXkPHQF%2B0FtdRgZoxkFPJlWE9m%2FB1ct8wnU1OhFBs1u0ulztgXMtEmE8SU5rOPFmc5wvaQzKulJxMvVSD6H9yo0hZMRcuel%2BjHeU%3D)

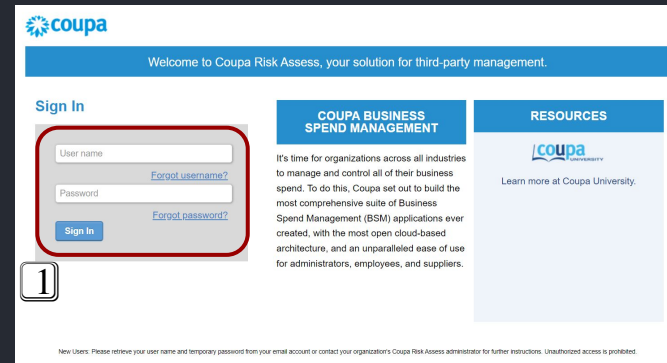
If you have any questions please contact your administrator at [coupa\\_admin@ft.com](mailto:coupa_admin@ft.com).

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

# Coupa Risk Assess Portal - Initial Setup

## Step 2

1. Once your account is created, you will be asked to **Sign In** with your email and newly created password.
2. The Coupa Risk Assess Portal homepage will show all evaluations required by the FT Group, the individual evaluation forms will be listed in the bottom half of the homepage. You will also be able to see the status of the evaluations.
3. To view and complete an evaluation form select the **View** button next to the corresponding evaluation form.



**Evaluations:** You Have **3** (0 Late, 3 Due This Week, 0 Due Later) [View Closed Evaluations](#)

**Approvals:** You Have **0** (0 Late, 0 Action Required, 0 Waiting) [View Closed Approvals](#)

**Action Plans:** You Have **0** (0 Not Started, 0 In Process, 0 Awaiting Approval) [View Closed Action Plans](#)

**Evaluations: Due This Week**

Name	Periodicity	Start Date	Context	Status	Due Date	Action Status	Action
Anti-Bribery & Corruption	One Time	9/17/2024	Legal Supplier	Not Started	9/27/2024		<a href="#">View</a>
Cyber Security	One Time	9/17/2024	Legal Supplier 1	Not Started	9/27/2024		<a href="#">View</a>
Sustainability	One Time	9/17/2024	Legal Supplier 1	Not Started	10/1/2024		<a href="#">View</a>

# Coupa Risk Assess Portal - Delegating Evaluation Forms

# Delegating Evaluation Forms

## Step 1

The evaluation forms can be delegated to other areas of your business if required.

To do this:

Open the evaluation you need to delegate, select the **View** button.

1. When the evaluation form opens, on the top menu bar you will see an option to delegate. Select **Delegate**.

2. A popup will ask you to confirm the action. Select **Confirm**.

The screenshot displays the 'Evaluation' interface. At the top, there is a navigation bar with 'Workspaces: R Portal', 'Last Login: 9/24/2024 10:54 AM', and a search field. The main title is 'Evaluation' with a sub-header 'Risk-Anti-Bribery & Corruption [Legal Supplier 1] - Onetime - Period Start 17 Sep 24'. A top menu bar contains buttons for 'Delegate', 'Recalc', 'Save', 'Cancel', and 'Submit'. The 'Delegate' button is highlighted with a red box and a circled '1'. Below the menu bar, there is a table with columns 'Item #', 'Description', 'Score', and 'Actions'. The first row has '1.1' in the 'Item #' column and 'BEFORE YOU BEGIN: Please see details below.' in the 'Description' column. Below the table, there is a warning message: 'You are receiving this form from the FT Group as more information is required before you can be onboarded as a supplier, or additional services provided. Please complete this questionnaire and return it back to us as soon as possible. Failure to complete this questionnaire will delay or prevent the FT Group from doing business with your organisation. If you have technical issues with completing this form, please contact [ ]. Please note: If you are idle for 45 minutes or more you will be logged out, please make sure you click "Save" to avoid losing your progress. Do not click "Back" without first clicking "Save".' Below the main interface, a 'Confirm Action' popup is shown with a close button (X). The popup contains the text: 'This action will take you away from the evaluation. Any unsaved changes will be lost. Do you want to continue?'. At the bottom of the popup, there are two buttons: 'Confirm' (with a green checkmark) and 'Cancel' (with a red X). The 'Confirm' button is highlighted with a red box and a circled '2'.



# Delegating Evaluation Forms

## Step 2

1. If the person you wish to delegate the evaluation to has a Coupa Risk Assess Portal account, start typing their name into the box in the Delegate to User/Group section. Their name will appear in the drop down for you to select. Select **Delegate**.

2. If the person you are delegating to has not created an account on the Coupa Risk Assess Portal, select the green **Plus** icon. You will have the option to manually enter their details.

Enter the email address and name of the person you wish to delegate the evaluation form to and select **Create User**.

They will receive an authentication code and account creation link. They will need to create an account before being able to access the evaluation forms.

Please see previous section on setting up an account with the Coupa Risk Assess Portal for support with this.

The screenshot shows the 'Evaluation Delegation' interface. At the top right, there are navigation links for 'Workspaces: R Portal', 'Last Login: 9/24/2024 10:54 AM', and 'Enter Keyword(s)'. Below this is a 'Back' button and a highlighted 'Delegate' button. The main section is titled 'Evaluation Delegation' with a subtitle 'Risk-Ass-Bribery & Corruption (Legal Supplier 1) - Onetime - Period Start 17 Sep 24'. Under 'Basic Information', there is a 'Current Scorer' field. The 'Delegate to User/Group' section is highlighted with a red box and a circled '1'. It contains a search box with the placeholder text 'Enter at least 3 characters to find a User' and a green plus icon. Below the search box is a 'Comments' section with a note: '\* Please enter why you are submitting this delegation.'

The screenshot shows the 'Create User' form. It has three input fields: 'Email Address \*', 'First Name \*', and 'Last Name \*'. The entire form area is highlighted with a red box and a circled '2'. At the bottom right, there are two buttons: 'Cancel' and a highlighted 'Create User' button.

# Coupa Risk Assess Portal - Completing and Submitting Evaluation forms

# Completing and Submitting Evaluation Forms

## Step 1

Open the evaluation you wish to complete, select **View**.

When the evaluation form opens read the introduction and complete the questions.

Once you have entered/chosen your responses at the bottom of the screen, select **Submit**. This needs to be done for each evaluation form.

Please note: You also have an option to save your responses to complete at a later stage. Until we have received all evaluation forms we will not be able to issue PO's or receive invoices, please complete and return these as soon as possible.

The screenshot displays a web-based evaluation form interface. It features several question sections, each with a question number and a 'View' button. The first question (Q2) asks 'Does your Company provide training to staff on Anti-Bribery and Corruption?' with radio button options for 'Yes' and 'No', where 'No' is selected. The second question (Q4) asks 'Please explain how your Organisation ensures it complies with Anti-Bribery and Corruption legislation.' and includes a text input field with the placeholder 'see our policy'. The third question (Q5) is 'Evaluation complete' with a '0:00' timer and a 'View' button. The fourth question (Q6) says 'Thank you' and has a 'View' button. At the bottom right, there is a vertical menu with options: 'Top', 'Delegate', 'Reassign', 'Save', 'Withdraw', and 'Submit'. The 'Save' and 'Submit' buttons are highlighted with red boxes. The Coupa logo and 'Business Spend Management' text are visible at the bottom center.

# Further help and support

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If you are unable to find answers to your questions within these guides you can refer to:

- [FT Supplier Webpage](https://aboutus.ft.com/suppliers), which includes FAQs and other supporting information: [aboutus.ft.com/suppliers](https://aboutus.ft.com/suppliers)
- You can contact our Procure-to-Pay Operations team at [p2p@ft.com](mailto:p2p@ft.com)

Or if you require technical assistance with Coupa you can refer to:

- [Coupa Supplier Help Centre](#)
- [Coupa Compass](#) - Provides generic user guides for Suppliers including videos, courses and resources to help with technical issues.
- View the '[Getting started with the CSP](#)' guide from Coupa
- From the [CSP homepage](#) you can click the bubble in the bottom right of the screen, to chat live with a Coupa specialist

# Glossary of Terms

<b>CSP</b>	Coupa Supplier Portal
<b>Admin</b>	The person with Administration rights for the Coupa Supplier Portal for your account
<b>Financial Times business contact</b>	The Financial Times employee you have been discussing supply of goods and/or services
<b>PO</b>	Purchase Order
<b>Users</b>	Your employees who have access to the Coupa Supplier Portal
<b>Invitation</b>	There are two types of invitation you could receive from the Financial Times, both will be sent by email. Suppliers already working with the FT will receive an invitation when we launch the CSP on <insert date>. After this date, any new Suppliers that start working with the FT will receive an invitation initiated by their Financial Time business contact.
<b>Coupa Compass</b>	This is Coupa's own support webpage that includes user guides for suppliers including videos, courses and resources to help with any issues you may have using the CSP, including technical help
<b>Supplier Information Form</b>	This is the form that will be sent by the Financial Times business contact. It is a Supplier Information form that allows The FT to collect basic company information from our Suppliers and is the first step in connecting with the Financial Times for business through the CSP