## 2.1 Conduct Business Process Review, Design and Architect the Solution

### Overview

Business Process Design is a key project activity that drives towards optimal system configuration and architecture. Complete signed off business process design ensures there are no process blockers later in the project that could impact other project milestones and overall timelines. Design process review sessions should educate customers on our best practices and demonstrate our recommendations in alignment with their requirements and success goals.

### Activities

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<th>Activity</th>
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| Schedule and lead Business Process Design Workshops| Core Project Team (Procurement, Finance, System Admin)                       | • Coupa Solution Architect leads workshops for Coupa led project. Attends workshops and supports partner on partner led project.  
• Initial workshops should be on site at Tier 1 and 2 customers | Completed Business Process Workshops | Business Design Workshop Decks  
1. Requisitioning Goods and Services  
2. Buying Channels  
3. Approvals  
4. Purchase Order Management  
5. Accounting  
6. Receiving  
7. Invoicing Workflow  
8. Master Data Handling  
9. Security Controls (Roles, Content Groups, Account Groups)  
10. Reporting/Analytics  
11. Budgets  
12. Expenses  
13. Inventory  
14. Contracts  
15. Sourcing  
16. SIM |
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<td>Capture customer requirements in Business Process Requirements Document</td>
<td>Core Project Team (Procurement, Finance, System Admin) Project Manager Solution Architect SME</td>
<td>• Coupa SA responsible for capturing business requirements on Coupa led project. Partner functional architect will do so on partner led. • Partner to review with Coupa SA before requesting sign off from customer</td>
<td>Signed off Business Requirement Process Document</td>
<td>Business Process Requirements Document SIM - Business Process Requirements Questionnaire CLM - Business Process Requirements Questionnaire</td>
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<tr>
<td>Capture Integrations requirements in Integration Requirements Document and Review Integrations Design Checklist</td>
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<td>• Partner/Client is responsible for filling out integration planning worksheet and capturing requirements. • Client responsible for sign off on design checklist • Client/Partner is responsible for completing the data mapping document. • Coupa TS architect is responsible for driving the partner/client to complete the documents and tasks • Coupa TS architect is responsible for</td>
<td>Signed off Integrations Requirement Document Signed off Integrations Design Checklist</td>
<td>Integration Planning Worksheet Integrations Requirements Document Integration best practices Integrations Design Checklist Integration mapping</td>
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<td><strong>Architect the solution</strong></td>
<td>Client/Partner Solution Architect, Technical Architect</td>
<td>• Coupa solution and technical architects work with client/partner to finalize solution architecture diagram</td>
<td>• Signed off Solution Architecture diagram that defines what business functions are mapped to Coupa vs. other systems in customer’s enterprise landscape.</td>
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<td><strong>Discuss and finalize customer enterprise architecture</strong></td>
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<td>• Coupa TS architect is responsible for having the discussions with the Client IT and enterprise architecture teams - resolve any issues/questions, provide recommendations on the choice of middleware, endpoint, data transformation, integration interfaces, error handling, monitoring etc.</td>
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<td><strong>Data Modeling</strong></td>
<td>Partner technical architect, Client technical architect, Partner Business architect, Partner SME, Client Business Architect, Client SME (procurement and AP)</td>
<td>• Coupa PS solutions architect will work together with the Coupa TS technical architect to model and design key data elements like COA, Suppliers, Addresses etc.</td>
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<td><strong>Security requirements management</strong></td>
<td>Coupa PS, Partner, Client technical team</td>
<td>• Coupa TS architect will triage the security related questions and address them</td>
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<td>• Coupa TS architect will reach out to the Coupa security team appropriately to address some of the advanced topics</td>
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