



SAP Concur Case Study | PUBLIC
Penn State University

Penn State University and SAP Concur Solutions: A Study in Academic Achievement

Seventeen Years of Innovation, Workflow Automation,
and Expense Management Success

Quick Facts

University Name

Pennsylvania State University

Solutions

- Concur® Expense
- Concur® Travel
- Concur® Request
- Concur® TripLink
- Intelligence
- Service Administration for Higher Education
- Web Services

Industry

Higher Education

University Size

33,545 Faculty and Staff

Location

University Park, PA

Why SAP Concur?

Penn State University was the first large higher education institution to implement SAP® Concur® solutions back in 2006. Over the years, SAP Concur solutions has continued to provide the technology and new functionality to meet the university's evolving needs — reducing paper, manual steps and consistently providing an optimum user experience. Most recently, in partnership with Huron, Penn State implemented a new instance of the SAP Concur platform for end-to-end integration with its new SAP S/4 HANA ERP solution, and utilized Concur Request to automate P-card distribution and maintenance.

ABOUT PENN STATE UNIVERSITY

Founded in 1855, Penn State is a top-ranked research university and Pennsylvania's sole land-grant institution, dedicated to high-quality teaching, expert research, and global service. The institution is comprised of 24 campuses, including a medical college, two law schools, a school of graduate professional studies, and an online World Campus. Its faculty and staff are all committed to setting up Penn State students for greater career potential and empowering them to make a positive impact on the world.



PennState

A Historic First in a Place Where History Is Made

It's impossible to think of Pennsylvania without thinking about its history. It's the place where the U.S. Constitution and the Gettysburg Address were written, and the Declaration of Independence was signed. It's the site of the first baseball stadium, the first daily newspaper, and the first public zoo.

Pennsylvania is also home to Penn State University, one of the largest public universities in the country — boasting a 94 percent career success rate, and alumni that range from notable actors, politicians and football stars to the brain trust of some of the most recognized companies in the world.

The university's finance operation is notable, too, both for its long-term user focus and cutting-edge innovation.

“We actually **incorporated electronic approval** into the legacy system we built - **which was unheard of in the 1980s,**” explained Jan Barnoff, Director, Financial Information Systems for Penn State University.

While the solution enabled Barnoff's team to process between 400 and 600 reimbursement requests per night, there was no reporting, visibility, or receipt capture. It also lacked the controls needed for the university to expand its existing P-card program — something faculty and staff had requested.

So, in 2005, Barnoff and team began searching for an expense management solution that offered the capabilities Penn State needed — and became **the first large university to become an SAP Concur customer.**

“What we saw in SAP Concur [solutions] was innovation. We could tell they were going to be one of the **leaders in the T&E space**, and they had a staff that was committed to making us successful. It's ended up being a great partnership that is still going strong, 17 years later.”

Jan Barnoff, Director, Financial Information Systems, Penn State University

The initial implementation was focused on Concur Expense — and streamlining Penn State's existing part-electronic, part-paper, hybrid model.

"In the past, our faculty and staff filled out electronic, 'special request for check' forms that routed through a predefined approval path," Barnoff explained. "It was very basic — the total for airfare, hotel, meals and other expenses were about all we could capture electronically. The receipts were still sent through campus mail."

SAP Concur solutions expanded that spend visibility, while getting rid of the paper.

"With SAP Concur [solutions], all of the receipts are electronic, and in one application," Barnoff said. "It's more convenient for our faculty and staff, and our approvers can easily see what they need to verify to approve the request."

STAYING CURRENT WITH CUSTOM REPORTING OPTIONS

It didn't take long for Barnoff to start expanding the relationship — adding Intelligence to the SAP Concur portfolio to capitalize on the data Concur Expense was now collecting.

"The reports have really opened up a lot of visibility in multiple areas," Barnoff said. "We have vendor spend reports for state reporting and for our auditors, as well as P-card transaction reports for different finance offices on each of the university's 24 campuses — each of which handle their own expense management. Our Procurement department uses some of these reports for price negotiations, as well."

PIONEERING FIRST-CLASS TRAVEL MANAGEMENT

When Penn State first became a customer, the primary offering from SAP Concur solutions was expense management. When Concur Travel became available a little later in the relationship, Penn State leaders were all in.

"Concur Travel was extremely exciting for us, because, in our initial RFP, we were looking for a one-stop shop for travel and expense — so, when our faculty and staff booked their travel, that information would integrate with their expense report," Barnoff explained. "Back then, we were unable to find a vendor on the market that had that capability."

Over the years, the use of Concur Travel has continued to grow, with half of the university's 1,000 travelers per month booking through the tool.

"Concur Travel allows us to direct our travelers toward those suppliers that have the best discounted rates, which is a big benefit," explained Lisa Steinbugl, E-Procurement, Travel and Purchasing Card Manager, Penn State University. "If they need to rebook in transit, they get better support, because they don't have to manage those changes on their own."

According to Steinbugl, **the value of Concur Travel was amplified during the 2020 pandemic.**

"We were able to take unused airfare booked through Concur Travel and move it to a new UATP (Universal Air Travel Plan) card to use when we start booking travel again," she said. "We couldn't do that for travel booked outside of the tool."

More importantly, Penn State leadership had the visibility they needed to get any traveling faculty and staff safely home.

"Although we don't mandate the use of Concur Travel, since the pandemic, a lot of departments are now doing that on their own. They clearly saw the value of what the tool offers in terms of **duty of care.**"

Lisa Steinbugl, E-Procurement, Travel and Purchasing Card Manager, Penn State University

New ERP. New SAP Concur Instance. New Partner. New Opportunity to Innovate.

One of Penn State's biggest T&E innovations, to date, took root because the university was overhauling its financial system, both replacing its home-grown ERP of 26 years with SAP's S/4HANA, and creating a new account code structure.

"Our 17-year-old SAP Concur application served us well. But, we basically used up all of the custom fields that were available," Barnoff said. "We didn't have enough fields to accommodate the new chart of accounts, and we really couldn't remap what we had to support the end-to-end workflow we wanted with the new ERP. It made more sense to build a new instance from scratch."

Working with SAP Concur and long-term consulting partner, Huron, Penn State set out to create a new SAP Concur instance — including utilizing a feature within Concur Expense to reduce the number of expense types without negatively impacting visibility.

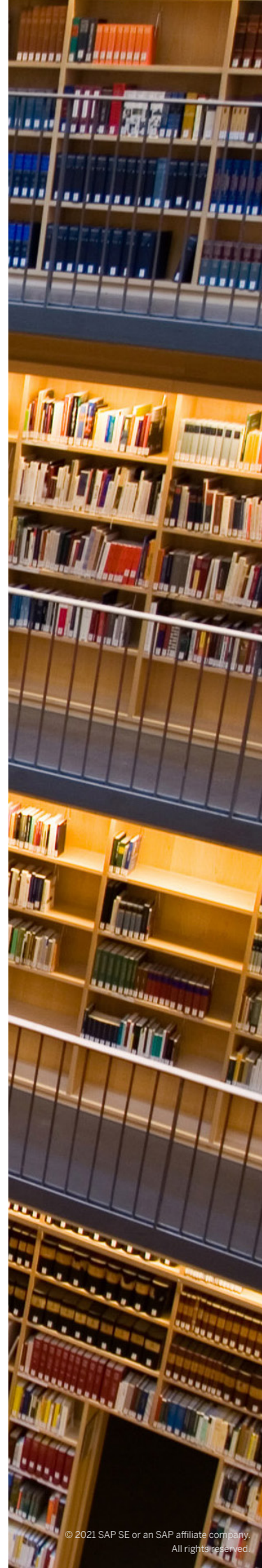
"We incorporated sub-lists from Penn State's accounting structure and, instead of having expense types for each, we added the details to drop-down lists. So, under the expense type 'Entertainment,' the drop-down included sub-categories like decorations, napkins, and cutlery as an example," explained Tonia Raber, Consulting Manager with Huron. "This enabled us to reduce the number of expense types significantly, but still provide the detail needed for effective oversight."

At the same time, university leaders wanted to find a way to automate P-card issuance in the new instance, so everything happened in one system of record. Prior to the implementation, Penn State had fully automated P-card processes with their banking partner in a separate system, with no manual intervention. University leaders wanted to maintain the automation achieved under their legacy system for their new P-card program — something that hadn't been done on this scale within SAP Concur solutions before.

Huron's solution? An innovative use of Concur Request.

"We were actually able to develop a report in Intelligence that almost mirrored the bank's Excel format for processing mass issuances through its processing system," Raber said. "That report is routed through the FTP site from Cognos to Penn State's data warehouse, where the 16-digit credit card numbers are housed. The numbers are auto-populated, and the report is routed back to the bank for processing."

The big change was that Penn State was able to bring all P-card services into the SAP Concur platform, creating a single location for P-card management. So, P-card requests, address changes, limit increases, and cancellations all happened automatically in the SAP Concur platform, which was a huge improvement for Penn State employees.



Continual Optimization. Outstanding Results.

From the original implementation of SAP Concur solutions to the launch of the latest instance and optimization effort, the partnership between Penn State and SAP Concur has continued to make history together.

Improved Efficiency

“The fact that all receipts are electronically generated for expense report submission and approvals is a huge time-saver,” Barnoff said. “We no longer have to bring those into the central office and have them scanned — which used to be a full-time job.”

For an organization like Penn State that processes 240,000 expense reports a year, **every second counts**.

Increased User Productivity and Satisfaction

“Our faculty and staff can do everything in one system now. They can request and update their P-cards, book travel, and generate expense reports for both goods and travel — all within SAP Concur [solutions],” Steinbugl said. “Before, they’d be hopping back and forth between systems. So, everything is faster and easier.”

Reduced Manual Intervention

With between **9,000-10,000 active P-cards** university-wide, it’s a constant flow of requests — from new staff requesting a card, to faculty members requiring a limit change, to new addresses, names, and cancellations. Now, all of these are automated through Concur Request, flowing from the university to the bank for fulfillment - without compliance risk or manual intervention.

“There is no way my staff of three would have been able to handle that volume of requests without adding more people,” Steinbugl said.

Improved Spend Visibility and System Performance

Huron was able to reduce the number of Penn State’s expense types from 1,000 to 200 — and map these to the general ledger — without negatively impacting transparency into spend.

Penn State has an end-to-end workflow, and a clear, near-**real-time view of spend**.

MONUMENTAL GAINS

Reduced Costs

By eliminating the need to scan receipts at the central office, Barnoff has been able to move one FTE to other, higher-value work.

Saved Time

By automating all P-card requests for the University’s 9,000-10,000 cardholders, university staff was able to work on more productive assignments.

Improved Performance

Reducing expense types from 1,000 to 200 optimized system performance

For the Glory of Old State

The way Penn State has transformed its operation over the years is impressive enough, particularly when you factor in the quickly deployed, new instance of the SAP Concur platform, and a never-done-before expanded use of Concur Request for automated P-card management.

But, this story has a very significant addendum.

Just a few months after the massive new instance/P-card request automation project got underway, the coronavirus pandemic began to take hold. In true Penn State fashion, instead of delaying the rollout, the entire project team was committed to “fight on.”

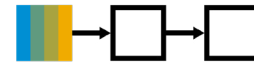
Though status meetings went virtual, training was remote and a continual stream of texts replaced face-to-face communication, Penn State’s full campus went live with its new SAP Concur instance on July 6, 2020—the same go-live date as the new ERP — with no pilot, no grace period, and remarkably, no hiccups.

“I’m so proud of how closely the Penn State team, SAP Concur and Huron, and all of our other partners worked together to make this happen, and I’m proud to say that it was implemented without any issues whatsoever,” Barnoff said. “What we did will benefit the university for years to come.”

Of all of the implementations, optimization efforts and innovations that Barnoff has led over her 36 years with Penn State, this one has personal significance.

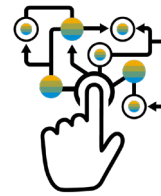
“I’m going to be retiring soon, so this was my capstone project. This was my swan song,” she said.

No question, she’s left her mark with another historic first for Penn State.



END-TO-END WORKFLOW

Spend data now flows seamlessly through SAP Concur solutions to the S/4HANA ERP without manual intervention, rekeying, or delay.



SCALABILITY

Automation and electronic workflow enables Penn State to scale, as needed, without adding headcount.



VISIBILITY

All travel, expense, and P-card transactions occur electronically, through SAP Concur solutions, for near-real-time visibility into spend.

ABOUT SAP CONCUR

SAP® Concur® is the world's leading brand for integrated travel, expense, and invoice management solutions, driven by a relentless pursuit to simplify and automate these everyday processes. The highly-rated SAP Concur mobile app guides employees through business trips, charges are directly populated into expense reports, and invoice approvals are automated. By integrating near real-time data and using AI to analyze transactions, businesses can see what they're spending and avoid possible blind spots in the budget. SAP Concur solutions help eliminate yesterday's tedious tasks, make today's work easier, and support businesses to run at their best. Learn more at concur.com or at the SAP Concur [blog](#).

About Huron

Huron is a global consultancy that collaborates with clients to drive strategic growth, ignite innovation, and navigate constant change. Through a combination of strategy, expertise, and creativity, we help clients accelerate operational, digital and cultural transformation, enabling the change they need to own their future.

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