



SAP Concur Case Study | PUBLIC

The University of Alabama **Moved from Paper-Based Processes to** **Digital Expense and Invoice Management**

The university improved their efficiency, transparency and user experience by shifting all spend - including P-card and advances - to run through SAP Concur solutions.

Quick Facts

University Name

The University of Alabama

Solutions

- Concur® Expense
- Concur® Travel
- Concur® Invoice
- Invoice Capture
- Concur® Request
- Concur® Detect
- Expenselt®
- Concur® Triplink
- Consultative Intelligence
- Service Administration for Higher Education

Industry

Higher Education

University Size

38,000 students

Location

Tuscaloosa, Alabama

Why SAP Concur Solutions & The University of Alabama?

The University of Alabama leaders wanted a proven, reliable partner to automate and streamline its travel, expense and invoice management processes. The goal was to find a partner for the long-term, with the breadth of products to enable the institution to continually optimize processes, improve efficiency and visibility, and lower costs.

SAP® Concur® solutions not only provided what the University needed, but have a solid track record of meeting the unique needs of clients in the higher education sector.

ABOUT THE UNIVERSITY OF ALABAMA

Founded in 1831 as the state's flagship university, The University of Alabama (UA) is committed to shaping a better world through teaching, research and service. With a global reputation for excellence, UA provides an inclusive, forward-thinking environment and nearly two hundred degree programs on a beautiful, student-centered campus. A leader in cutting-edge research, UA advances discovery, creative inquiry and knowledge through more than thirty research centers. As the state's largest higher education institution, UA drives economic growth in Alabama and beyond.



THE UNIVERSITY OF
ALABAMA®

A Textbook Case for Change

The University of Alabama (UA) is known as a place where legends are made - in its classrooms, in its research labs and on the gridiron. It's home to the Crimson Tide, one of the most storied and successful football programs in the country. It's also a university that has produced 15 Rhodes Scholars, 59 Goldwater Scholars, and a diverse list of notable alumni, ranging from Bear Bryant and Joe Namath to Lady Bird Johnson and Harper Lee.

With this hallowed history, it comes as no surprise that **the business side of UA is at the top of its class, as well, fueled by a culture that embraces optimization and technology** - and one that is never hesitant to fix what isn't working.

That's what happened in 2016, when Kevin Stevens, Executive Director of Procurement Services, proposed changing the way the university handled spend management. At the time, although requisitions were handled online, the rest of the expense and invoice process was completely paper based, largely facilitated through inter-campus mail. There was no real-time visibility into spend, and no easy way to manage reimbursements and compliance.

Stevens knew that this highly manual approach to spend management wasn't sustainable for the long term.

“The payment process was paper-based, with no visibility, and **we set out to change that**. Because Procurement had great support from my supervisor and the VP, we could go full steam ahead and push for the things we knew would **make the University more efficient.**”

Kevin Stevens, Executive Director of Procurement Services, The University of Alabama

Stevens and team began an extensive due diligence process looking for the right solutions.

“We wanted to make sure any product we considered would provide electronic workflow and the electronic document processes we needed to operate more efficiently, and gain visibility into our spend,” Stevens said.

After carefully vetting every option, they chose SAP Concur solutions.

A BLITZ-STYLE IMPLEMENTATION

Stevens took an aggressive approach to implementation, rolling out Concur Expense and Concur Invoice for non-PO/direct payment purchases - which impacted the highest volume of users - at the same time.

“We didn’t want to go through the process twice,” Stevens said. “We have limited staff, and felt like we could put more resources into customer service afterwards, than if we did it in stages.”

Stevens engaged the Procurement Training Manager and Accounts Payable and P-card offices to create videos, online content, and in-person classes to train staff and faculty.

“To gain access to the system, get reimbursed or submit any kind of payment request, you had to have the online or in-person training,” Stevens said.

AN EFFICIENT EXPENSE PROCESS FOR ALL

It didn’t take long to start seeing the impact - and a clearer picture of university spend.

“I honestly couldn’t tell you how long it took to process an expense report before because we

had no way of tracking or monitoring those paper reimbursements,” Stevens said. “People had to go into an Excel form, complete it, print it out, attach receipts, sign it and send it to their supervisor, then to a second approver, then to us—all by campus mail. You’re looking at a minimum of three days before it ever got to our office.”

Today submissions and approvals all occur electronically. Users can fill out an online expense report on their mobile device, take photos of their receipts and quickly route it through the process.

“Now, from the time of submittal, we average about two-and-a-half days to payment,” Stevens said.

Mandated use of the expense solution ensures UA sees maximum benefits.

STREAMLINED INVOICE PAYMENTS

To keep things simple and consistent, Stevens utilizes the same workflow for Concur Invoice as he uses for Concur Expense. Initially, the solution was used for direct-pay vendors only.

“We can electronically upload documents, which ensures that our vendors get paid efficiently, in a timely fashion,” Stevens said. “So, it does exactly what we need it to do.”

In May 2021, UA went live with Invoice Capture, which uses OCR (Optical Character Recognition) to automatically capture vendor invoice information submitted by email, electronically or by regular mail, and Concur Invoice for PO invoices. This eliminated the need for his staff to review invoices and hand key the data into the payment system.

“By eliminating the hand keying alone, we should be at least 50 percent more efficient. That’s been our approach through all of this. Look for where we have inefficiency, manual work or paper, and make changes to eliminate those, which we’ve done with this system and our processes.”

Kevin Stevens, Executive Director of Procurement Services, The University of Alabama

Increasing Card Rebates

Although UA had a P-card program since the early 2000s, it wasn't well utilized, which meant the University was missing out on another revenue stream in the form of rebates.

"The use was low because the single transaction limit was only \$2,500, and the process of submitting an invoice to pay was not very efficient," Stevens said. "So, some people were even issuing POs for small purchases."

Stevens raised the single purchase limit and promoted the ease of invoice submission through the new system. He also gave UA employees and faculty good reason to make their purchases by card.

"If someone made a purchase on their own card, outside of travel, and sought reimbursement for that, it took about two weeks to get paid, and I'm going to make you provide justification for why you went outside of the normal methods of purchasing," Stevens said.


That fiscal tough love paid off. **When Stevens came to UA in 2008, the University averaged about \$25 million in purchases, per year, on the card. By 2019, that number jumped to \$68 million.**

AUTOMATING AUDITS

In January 2021, UA went live with Concur Detect to automate audits on the front end—with the goal of reducing non-compliant spend, while freeing staff from the "stare and compare."

"We were auditing 100 percent of our P-card and expense reimbursement requests and invoices," Stevens said. "The goal is to get to the point where we automatically approve those low-risk items, and audit the medium and high risk."

According to Stevens, in addition to reducing the number of man-hours spent conducting audits, Concur Detect is helping identify the types of things his team really should be looking at.



"For example, Concur Detect helps identify duplicate requests, which is something we couldn't really audit before. So, being able to say that we have a mechanism to look for those now is big for us."

Kevin Stevens, Executive Director
of Procurement Services, The University of Alabama

Realizing Tangible Results

UA's transformation from paper-based processes to streamlined travel, expense, and invoice spend management has had a measurable impact.

IMPROVED PRODUCTIVITY

Now, the UA staff can process expense reports and invoices in less time, so staff and faculty get reimbursed more quickly. Expense reports no longer involve paper and campus mail.

"We can process more quickly, because we've taken away all of the manual work," Stevens said.

"Our approvers and our regular users are much more productive, as well. The whole process is easier."

COMPLETE VISIBILITY INTO SPEND

With the addition of PO invoices and advance requests, UA is now handling all of its expenses, invoices and payments through the SAP Concur platform.

"We now have a full picture of our spend, and don't have to look into two or three different systems to merge and verify the information," Stevens said. "That also makes reporting and overall fiscal governance easier as well. Everything we need to see is in one place."

Kevin Stevens, Executive Director of Procurement Services, The University of Alabama

INCREASED COMPLIANCE

The use of Concur Detect ensures supervisors and budgetary approvers aren't the first-line compliance safeguards, and that audits don't happen after expense reports have been routed and approved.

"The universal policy check is done for our employees on the front end. So, if there's an issue, it's sent back to the submitter before it ever gets to the supervisor and budgetary approver now," Stevens said.

IMPROVED DUTY OF CARE

When the University reopens non-essential travel, it will begin mandating that all travel is booked through Concur Travel. This mandate not only increases spend control and visibility, but, more importantly, ensures University leaders know where their faculty, staff and students are at any given time, for improved duty of care.

VISIBLE BENEFITS

Saved Time

Every rollout has decreased the time it takes to submit, approve and process expenses and invoices. Digitizing PO invoices alone cut the time staff spent processing those transactions in half.

Accelerated Reimbursements

Expense reports are now processed and paid within 2.5 days.

Reduced Costs

By reducing manual processes, Stevens has been able to reallocate 3-4 FTEs to other higher-value functions.

Ready for Anything Including a Global Pandemic

The University of Alabama's well-oiled business continuity plan was put to the test when the COVID-19 pandemic hit full force. **Because Stevens and team had electronic processes already in place, it was "business as usual" - even during a very unusual time.**

"When we left here on that Friday before Spring Break 2020, we were ready to go. When we went home, we didn't miss a beat," Stevens said. "We purchased some laptops for our hourly staff who didn't have the proper equipment at home, but, other than that, everything happened as seamlessly as it would if we were back on campus."

UA has had a lot of victories on the football field and has won its share of national championships. But, with the support of University leaders, what Stevens has been able to accomplish is equally impressive.

"We've gone from a pencil-based system to an electronic system," he said. **"That's the biggest, most efficient thing we've done so far."**

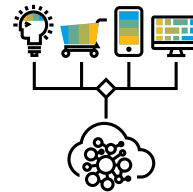
They gave him the ball and he ran with it, in true UA fashion.

Roll Tide.



FLEXIBILITY

Because all spend management was electronic, and consolidated in one solution, UA could easily transition from office to remote work setting without any downtime or process interruptions.



EFFICIENCY

Staff can now process expense and invoice payments more quickly, without cumbersome manual processes.



SUSTAINABILITY

By eliminating paper expense reports, invoices and envelopes routing through campus mail, UA reduces its carbon footprint while streamlining processes.

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](#).

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