



MANAGING COMPLEX USER-DRIVEN EXPENSES ACROSS A CHANGING CAMPUS LANDSCAPE

CAPITALIZE ON THE LATEST IN AI WITH A SOLUTION THAT INTEGRATES SEAMLESSLY WITH YOUR CORE APPLICATIONS. COUPLE THAT WITH AN INTUITIVE INTERFACE TO SUBMIT AND TRACK EXPENSES & TRAVEL, AND YOU'RE SETTING YOUR INSTITUTION UP FOR FUTURE GROWTH AND STABILITY.

WITH THE DAWN OF THE POST-PANDEMIC ERA comes a new type of employee, new work environments, new expense types, and the need for an ever-evolving institutional policy that flows across your entire infrastructure. Staff has changed exponentially, as have work rituals and environments. Expense, travel, and vendor management play a critical role at any institution, whether it's for research and study abroad, pay-to-procure, conferences and events, professional training, athletics, and more.



Bridgewater State University is a historic public institution in Massachusetts. Outside of the University of Massachusetts system, it is the largest of the state's universities with a student population of approximately 10,000 and staff of 1,500.

By selecting and implementing SAP Concur, the university chose to put into place a fully integrated travel and expense solution across campus, to connect disparate technologies and policies and save time and money while improving accountability.

We spoke with **Tara Thompson**, assistant director for travel and expenses at **Bridgewater State**, and **Jim Cambray**, senior director of higher education sales for **SAP Concur**, to discuss how AI, smart tools, and policies for managing expense and travel can be scaled to make a big difference in any size of school, regardless of its ERP.

What is Bridgewater State doing that's unique — and how can an integrated platform like SAP Concur help?

Tara Thompson: Using the Concur platform, we have better visibility into spending across the entire campus. We've built audit rules, restrictions, checks, and automated workflows into the system to ensure compliance with our institutional policies and simplify processes for end users — as well as create efficiencies for our AP staff. We have built-in workflows ensuring that no one can approve their own reports or anything they submit themselves. All expense reports are routed automatically to the appropriate parties as fed into the system through HR. Nothing is just done by one individual; there are always checks and balances. That is part of the SAP Concur system, and it helps us control risk. SAP Concur is the only travel and expense solution that integrates with all our other solutions across the institution.

With airfare and lodging, we've configured the platform so that anything chosen must be within \$100 of the lowest logical price. This allows for some flexibility while controlling the spend.

Tracking and managing receipts can also be challenging. If you don't have receipts, you can't get reimbursed — and audits become difficult. Staff members use a mobile app called Concur ExpenseIt to simplify the capturing and managing of expenses. Users can simply take a picture of a receipt with

CONCUR
EXPENSEIT
SIMPLIFIES THE
CAPTURING AND
MANAGING OF
EXPENSES



their phone and it automatically uploads to their Concur receipt library. This completely eliminates the need to keep track of paper receipts. We can also lift these receipt images when auditing needs occur. It's probably one of my — and all of Bridgewater's — favorite features.

In addition, we have set up alerts and messaging so that employees know when they need to submit reports if they have expenses. If approvers don't respond to submitted expense reports within a certain amount of time, these payment requests go directly to their supervisor. That automated workflow helps with getting payments submitted in a timely manner, because requests aren't held up waiting for someone to do something. **The system is actively helping people with friendly reminders and pushing processes forward.**

All of our employees are required to use the Concur Travel booking tool, which is connected to our duty-of-care provider, Healix International, a partner within the SAP Concur ecosystem. Itineraries within Concur Travel feed into Healix automatically. Healix looks at these itineraries and provides country briefings before people leave for travel. It also sends alerts to designated administrators if there are any potential security issues. This gives people the opportunity to decide whether they want to reschedule their travel. The system



allows for two-way messaging, so we can quickly and easily contact travelers in the event of an emergency.

We are also unique in that we're a travel-mandated school. This saves us time, money, and enhances security. We realize that's unique within higher ed and doesn't relate to everyone, but it has helped us.


Jim Cambray: Expenses are likely the second biggest line item that colleges and universities are dealing with after salaries. The SAP Concur platform can help institutions manage these as one continuous process across multiple applications and departments, while providing a simple, intuitive user experience that helps with streamlining and onboarding into the future.

Another issue since the pandemic is the changing nature of the workforce. Staff is experiencing turnover, employees are working remotely and many still expect to work from home, and institutions need digital processes and workflows in order to remain competitive. There has been a lot of turnover in IT organizations on campus. Administration is also seeing unprecedented changes. Auditing expenses, entering invoices, delegate expense creation — these are roles becoming less attractive on campuses. Younger staff expect digital systems and processes in order to succeed in their jobs. They don't want to spend hours doing archaic manual processes. They come from business and the workforce expects tools that drive productivity. SAP Concur delivers that integrated solution.

When you're educating the leaders of tomorrow, you can't have outdated systems on campus. I met with a CFO last week who is looking to leverage AI to automate manual audits, so they can reallocate those staff members to other, higher priority projects.

What are some of the key challenges that colleges and universities face in managing employee and department initiated spend?

Thompson: Many schools have employees paying for expenses out of pocket, which can be challenging. Some employees may not be able to afford travel, and so they're unlikely to participate in off-campus professional learning opportunities. If they pay out of pocket, they often have to wait months to get reimbursed. It's not really an equitable practice, nor is it practical.



INTUITIVE
USER EXPERIENCE
HELPS WITH
STREAMLINING &
ONBOARDING

Compliance is also critical. How can you ensure compliance with institutional policies when people can freely do whatever they want using any booking tool, and select any vendor, hotel, or airfare with no control over the costs?

As a state institution, we are bound to comply with state ethics rules. For example, public employees aren't allowed to benefit by using state funds, which means we shouldn't be personally using frequent flyer miles, hotel, or credit card points.

Safety is another big issue. In the event of an emergency, how can you find employees who are traveling if they've booked their travel through any booking tool? You don't have their itineraries. "Duty of Care" is a huge concern, and institutions need to take it seriously.

Cambray: Another key challenge that institutions face is a lot of outdated, disparate, siloed systems on campuses. Employees often enter data into multiple systems in order to track and manage purchasing, travel, invoicing, and tail spend. This is challenging for the end users, and it's challenging for administrators because they don't have easy visibility into what is being paid or spent. It's also difficult from an IT perspective to manage these various systems.



Many colleges and universities use ERP systems that have modules for managing travel, invoicing, and expensing. In your experience, where do these systems fall short — and what can SAP Concur provide that these systems can't?

Cambray: Your ERP and finance system is the functioning heartbeat of your campus, and these systems *do* have modules that allow you to enter invoices and other expenses. But these modules often require employees to enter information manually — and they generally don't provide a great user experience or integrate with other critical end-user applications. Manual data entry lends to mistakes and causes frustration for end users. While those systems take a modular approach, we take a platform approach.

Thompson: Bridgewater uses Ellucian Banner as its ERP. We were one of the first schools to contract with SAP Concur's partner, iData, and utilize their connector with Concur — so we learned and grew together and have formed a great partnership that has significantly improved our processes. I believe our experiences have provided valuable insight into ERP implementation processes with other schools and companies.

Cambray: SAP Concur offers the only integrated travel and expense platform. This easy-to-use platform is then able to extend to hundreds of third-party partners that allow schools to automatically exchange data to meet critical business needs. This delivers a truly connected environment across the entire institution while feeding the information needed to run your finance system. We also understand the multitude of ways schools handle payment processes and accommodate completely touchless payments as well as check requests.

To sum up, when institutions are looking to automate their management of expenses, procurement, and travel, what advice would you have for how they can do this effectively to set themselves up for future growth and stability?

Thompson: Automating our expenses and spend management across the institution gave us an opportunity to review our policies and procedures and evaluate what works and what doesn't. Don't be afraid to make those adjustments. Just because you've always done things a certain way doesn't mean that's the right way or the only way.

Colleges and universities want happier employees and better

INTEGRATED
PLATFORM ALLOWS
SCHOOLS TO
AUTOMATICALLY
EXCHANGE DATA



supported staff. The Concur platform has delivered on this. **Faculty love the system.** It's intuitive, user friendly, requires less work, and makes a typically painful process much easier and more seamless.

I even had a faculty member tell me, "You *can* actually teach an old dog new tricks." For someone to say that to me, I know it's a good system.

Cambray: We're in new territory now, post-pandemic. I would encourage institutions to look at the amount of spend impacted by their business processes and treat it strategically. Consider a best-in-class platform that goes much broader and much deeper versus a modular system, and one that can integrate seamlessly with your current ERP along with multiple unique systems across the institution. Doing this will give you much better insight into your data from which you can control and manage costs more effectively — while providing the best user experience for your diverse campus community. ■

Listen to the podcasts here:

Managing Complex User-Driven Expenses Across a Changing Campus Landscape

Interview with Bridgewater State University