Implementation of Concur as Travel and Expense Solution at York U

OUCC, Monday April 28, 2014 @ 10:30 AM
Agenda

• Welcome
• Project Introduction
• Project Implementation
• Challenges
  • Client Solutions Manager
  • Application Owner/Support Manager
  • Project Manager
• Questions and Answers
Original Process
Paper Based, Manual, Slow, Time Consuming

Original Process
Approvals
Finance
Cheque
Original Process Requires up to 6 Different Forms - This will be replaced by a Browser/Web Experience

[Image of original forms and new browser/web interface]
Project Introduction

- York processes over 16,000 travel & expense transactions for approximately 1000 users on an annual basis
- Approximately $15 million spent in travel annually
- Paper based process with up to 6 different forms used per claim
- Difficult to use & labour intensive
- Between 3 -7 individuals handling each claim today
- All claims currently processed by 2 Finance clerks
- Lack of visibility - cannot track status of expense reports
Automated Process
Use of Technology to Improve Process for Users
Vendor Selection

- RFP released May 2012
- Preferred Vendor Identified – Concur Technologies
- Contract signed May 9, 2013
- Productivity and Innovation Fund (PIF) proposal for a group of Ontario Universities was successful in securing government funds towards Concur implementation
Examples of Higher Education Institutions Using Concur
Governance Structure

- **Broader University Community**
  - **Advisory Board**
    - Champions of project within department; identify User Groups
    - Periodically advises on how T&E system will impact faculty / area
  - **Power Users**
    - Users become subject matter experts on system within their department. Users test the system and provide feedback on functionality to Core Team.

- **T & E Project Team**
  - **Steering Committee**
    - Provides direction & oversight
    - Reports Project status & risks
  - **Core Project Team**
    - (includes Organizational Change Management Committee)

Steering Committee decisions are guided by feedback given by the Advisory Board. Critical issues are discussed between Steering and Advisory. Critical issues are discussed between Steering and Advisory.

Users become subject matter experts on system within their department. Users test the system and provide feedback on functionality to Core Team.
# Project Phases

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<th>Project Phases</th>
<th>Phase</th>
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Challenges
CSM

- Client loves product and is excited about implementation

- Client and sponsor expectations of vendor shaped by successful implementation of SciQuest - well structured and well managed.

- Sponsor- influenced timeline based on vendor cookie cutter approach (not Higher Ed reality)
  - Only peer comparison Manitoba with different approach.

- RFP based on Finance requirements, requirement validation with community only started after contract signed.

- Organizational Change Management

- Escalate when teams not getting what they needed – an onsite working session would be beneficial.
Application Owner/Support Manager

- **Surprise!** Concur ≠ SciQuest
- Lack of test site
  - Testing available only through test user in production
- CSV versus Web Services
- All technical calls scheduled for 1 hour - not enough
  - General response to questions
  - Data definitions not clear
- Single Sign-on cannot recognize attributes in SAML
- No flexibility on file upload times
Application Owner/Support Manager

Integration Points – Phase 1:

- Simple lists – optional chartfield values
- Connected lists - a combination of the COMBO_EDIT table and a tree within Finance
- Employee Load - pulls data from both HR and Finance
- Payment Confirmation import
- Standard Accounting Extract (SAE)
  - file layout contains 256 fields
Application Owner/Support Manager

• Use CSV files for List Imports (Simple and Connected lists), Employee List Import, Payment Confirmation Import and SAE

Rationale:

• Web Service for Employee List import cannot handle 350 record definition - required for the travel component
• Payment Confirmation must be a CSV file
• SAE must be a CSV file
• For internal process consistency, simple and connected lists will also be sent by CSV instead of web service API (batch sizes restricted to 500)
Application Owner/Support Manager

- Total development effort well over 300 hours including time spent getting the functional specifications, completing the technical design, coding, testing, etc.
- Unable to use web services to link to reporting system
- Implementation of Web services presented the option of a test site (standalone site - replica of production)
  - Looking at possibility to turn this into real test site, to be connected to our PeopleSoft QA
  - Will be required for additional phases and upgrades
  - *We are willing to pay for this service!*
Project Manager’s Perspective – Internal

• Project Timeline
  • Pre-determined by Finance (9 months max.)
  • Based on Concur average implementation
  • Used UofM as guideline (7 months)

• Recommended resource level of commitment
  • 1 FTE PM
  • .5 FTE BA
  • 1.5 FTE Developer
  • .5 FTE for PGP Encryption, file transfer, LDAP
  • 1 FTE Functional Lead
  • Additional Functional Resources needed for Requirements Gathering, Solution Design, Configuration & Integration Testing
  • Communication/Change Management/Training
Project Manager’s Perspective - Concur

- Turnkey approach to Project Management
  - Templated approach to PM requires a very strong PM on the university side to keep project on track.
  - Vendor works in silos - did not take a holistic approach

- Challenging approach – Configuration takes place prior to technical solution design.
  - Inability to finalize scope/schedule until technical solution design complete
  - Concur process does not allow for technical calls to begin early enough in the process. Implications of all integration points not revealed until technical knowledge transfers took place.
  - Concur has now created a “Higher Ed” package that includes on-site consulting services. Recommendation to include this early on in project and cover off Configuration and Technical knowledge transfer.
Configuration Challenges

- Workflow
- Terminology
- Cash Advances
- SSO – login is displayed (Employee ID – potential privacy issue)
- VAT – not handled in ideal manner
- Mobile App – BlackBerry limitation
Feedback from Community Testing & Faculty/Unit Consultations

• Feedback was requested regarding:
  • System Configuration
  • Faculty/unit specific Challenges

• Feedback regarding system configuration was generally positive.
  • Built in system functionality – FX & HST calculations; Google Maps
  • Claim review made easier with scanned receipts at line level
  • Built in reminders / requests for supporting documentation
  • Visibility of claim
  • Delegation feature
Feedback (continued)

• Concerns raised regarding:
  • Limited ability of approvers to make changes to the claim
    • This is a system limitation within Concur
    • Can only change Approved Amount & Approval Flow, addition of comments. Cannot adjust cost centres, etc…
  • Understanding roles in Concur
    • Role matrix to link roles in Concur to current roles at York will be included in Training Material and distributed to Faculties/Units
  • Senior Executives and Faculty required to setup initial profile (including Approvers and Delegates)
    • Finance to provide templates to EO’s/FO’s to populate Departmental Review and One-Over-One Approval step as well as Delegates
Feedback (continued)

- Cash Advances cannot be allocated to individual cost centres
  - Use system functionality to remind Claimants when cash advances need to be cleared
  - Investigating reporting options in Concur to inform Faculties/Units of outstanding cash advances in their area

- Electronic preparation, submission and approval is a significant departure from the current process for Senior Executives, Faculty, and Staff
  - Administrative Assistants (Preparers) & Local Power Users to be provided with training to provide assistance
Questions
Contact Information

Project Manager
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Manager, Enterprise Business Application Services
Karen Furlonge - furlonge@yorku.ca

Client Solutions Manager
Wendy Drahovzal - drahovw@yorku.ca
### Project Schedule

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<th>Major Milestones (Phase 1: Expense Reporting for Employees)</th>
<th>Status</th>
<th>Completion Date</th>
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<td>Project Launch</td>
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<td>Community Engagement: Focus Groups &amp; Surveys</td>
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<td>July</td>
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<td>Business Requirements Documentation</td>
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<td>October</td>
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<td>Technical Analysis &amp; Design</td>
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<td>Training (for Pilot Group)</td>
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<td>Concur Expense Pilot – Go Live (Employees)</td>
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<td>Concur Expense Community Rollout (Employees)</td>
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<td>April - June</td>
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# Rollout Plan

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# Training Plan – Delivery Options

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<th>Delivery Method</th>
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| On-line training materials   | • On-line training modules to be posted on Finance Website  
• Brief (5-10 minute), modular, topic specific videos                                                                                 |
| In Lab Sessions              | • In class (lab environment) facilitated training with strong hands on component in using the system  
• 1 – 3 hours (session dependent)                                                                                                       |
| Webinar                      | • Facilitated training session via Webinar  
• 1 – 3 hours (session dependent)                                                                                                         |
| Power Users                  | • Direct coaching by Power Users on basic system set up and functionality  
• As required                                                                                                                             |
| Power User Training          | • Facilitation session for preparers/reviewers who will act as local resources to claimants and approvers. Focus will be on differences between roles, use of smart devices, troubleshooting, resolving unique situations, etc. |
| Concur User Support Desk     | • Direct support on system functionality provided by vendor  
• Available globally, 24 hours a day, 7 days a week                                                                                      |
# Community Engagement

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<th>Communication Method</th>
<th>Purpose</th>
<th>Target Groups</th>
<th>Roles</th>
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<tr>
<td>On-line Survey</td>
<td>To gain insight into current practices and efforts of users and obtain high level metrics.</td>
<td>Targeting broader community.</td>
<td>Claimants, Preparers, Reviewers, Approvers</td>
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<tr>
<td>Focus Groups (1.5 hrs delivered by the T&amp;E Implementation team)</td>
<td>Customized to the user group to discover needs for configuration and what the ideal system would include.</td>
<td>EO/FO, YUSA Members, YUFA members, CPM members</td>
<td>Claimants, Preparers, Reviewers</td>
</tr>
<tr>
<td>Individual Interviews (30 – 60 min. delivered by T&amp;E Implementation team)</td>
<td>Customized range of questions intended to dig deeper into user configuration requirements. To act as a follow up to the focus group sessions where required.</td>
<td>SEO, EO/FO, YUSA Members, YUFA members, CPM members *Focus on high volume users</td>
<td>Claimants, Preparers, Reviewers</td>
</tr>
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