

DFA Conversations

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Agenda

- Travel updates:
 - Travel management company (TMC) request for proposals (RFP) process
 - SAP Concur system updates
 - SAP Concur new user interface
- Shared Services Center (SSC) update



Travel Management Company RFP Process

- The RFP process was done to obtain competitive bids, focusing on:
 - Company profile
 - Travel services
 - Operations and performance standards and measures
 - Agency fees
 - Implementation plans
- TMC supplier presentations and evaluations will be completed in April 2022.
- Supplier will be selected in May 2022.

SAP Concur System Updates

- Inactivated some expense types from the Non-Travel Business Expense policy within Concur.
- Modification of some expense types from Travel policy in Concur:
 - Changing Other Ground Transportation to Ground Transportation.
 - Removed Taxi – it is now considered Ground Transportation.
- These changes are in anticipation of the new user interface.

SAP Concur New User Interface (UI)

- Concur's deadline for converting all clients to the new UI for the Request and Expense modules is **October 1, 2022**.
- Cornell's projected cutover date is **July 29, 2022**.
- Training documentation, job aids, FAQ, etc. will be updated.
- We will be identifying a pilot user group to help test the new UI.

SAP Concur New User Interface (UI): Benefits

- Increased accessibility (the ability of all users to access system functions regardless of physical or cognitive ability).
- Improved usability (the ability to perform the tasks effectively, and efficiently while enjoying the experience).
- Enhanced functionality to optimize task flow.
- Have a more modern and consistent experience.

SAP Concur New User Interface (UI): Features

Quicker Expense Reporting

- Add and create expenses from one location.
- Fix issues fast, and easily identify corporate card charges ready to be expensed.

Straightforward Expense Details


- View and edit details like itemizations and attendees when you open an expense.
- Reference an image of your receipt while you work on an expense.


Easier Itemizing

- Have more space for itemizations on a separate tab in the expense.
- Itemize hotel room rates by night, which translates to quicker, simpler, and more accurate expense reporting.

Faster Allocations

- Access allocations in one place with the ability to allocate a single expense or several expenses at the same time.

SAP Concur  Requests Travel **Expense** Approvals Reporting App Center Administration | Help

Profile 

Manage Expenses View Transactions Cash Advances Process Reports

SAP Concur User Interface Demo \$0.00

Not Submitted [Submit Report](#)

Report Details Print/Share Manage Receipts Travel Allowance

[Add Expense](#) [Edit](#) [Delete](#) [Copy](#) [Allocate](#) [Combine Expenses](#) [Move to](#)

No Expenses
Add expenses to this report to submit for reimbursement.





Shared Services Center (SSC) Update: Cornell's Goals

The goal is to plan for potential future economic disruption and ensure the availability of resources to cover unanticipated expenses by doing the following:

- Implement approved functional review cost-reduction scenarios that target reductions in spending and operational redundancies and maximize the use of resources.
- Clarify the purpose and understanding of roles and decision-making responsibilities for greater efficiency and effectiveness.

SSC Update: Functional Review Objectives



Clearly define roles, responsibilities, performance standards, and accountabilities within every major administrative area and function, including related college and unit programs.



Realize increased effectiveness and efficiency in administrative services across campus.

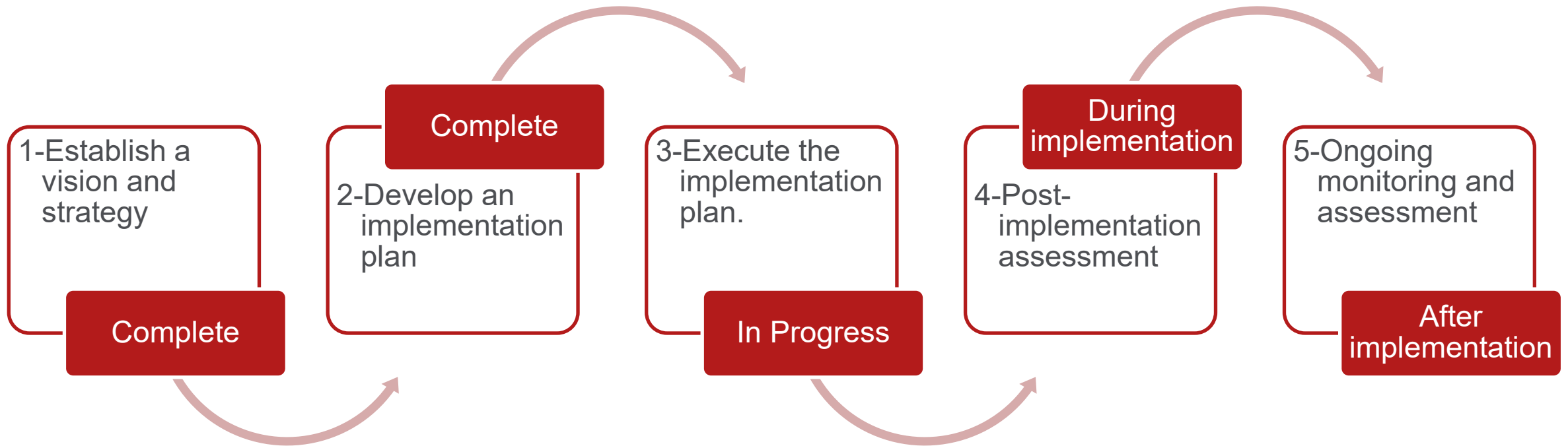


Develop consistent service expectations and quality standards.



Create opportunities for advancement and talent retention.

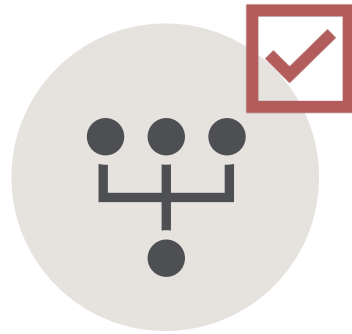
SSC Update: Functional Review Stages



SSC Update: Activities Completed in Stage One



Performed an inventory of all transactions processed in the business service centers.



Focused on those services/transactions that are generated in the unit and pass through the business service center.



Recommended a single shared service center model.



Received approval to develop an implementation plan, which will include a staffing plan and communication strategy.

SSC Update: Implementation Phases and Functional Areas



1

Phase One

- Procure-to-pay
- Travel & Training
- Financial management (incl. sponsored activities)

Up to 18 months (or longer) because this will be a large org. (100+ people)



2

Phase Two

- Payroll
- Revenue and accounts receivable (incl. billing and contract management)

SSC Update: Implementation Plan Benefits

- The number of “touches” on transactions will be reduced, creating efficiencies.
- Integrating and standardizing processes will enable greater compliance.
- Adjusting thresholds for reviews, authorizations, etc., will result in greater effectiveness.
- More opportunities for centralization will be created.
- Unit administrators will retain control and management of mission-critical activities and some business processes.
- Employees will receive cross-training and development opportunities.

SSC Update: Activities Completed in Stage Three

- Integrated SC Johnson College of Business and Statler Hotel.
- Formed a search committee for the SSC leadership positions.
- Posted positions and conducted searches.
- Filled vacant positions within the UBSC.
- Functional area assignments completed for UBSC and Payment Services staff.
- Developed the Travel functional area, which will assist CALS, Research, and SCL in processing all Concur travel-related transactions.
- Created an SSC TeamDynamix site for the three functional areas.

SSC Update: Next Steps for the SSC

- Finalize the SSC staff position descriptions (SPD).
- Finalize the Service Level Agreement template.
- Begin the BSC integrations, starting with two units:
 - College of Arts and Sciences.
 - College of Veterinary Medicine.

SSC Update: Next Steps – Communication Plan

Communicate project updates including staffing, to the following groups:

- University financial leaders.
- Staff affected by the integration.
- Staff that will be affected by the integration later.
- Customers of the SSC services, including faculty.

Create an SSC webpage to provide links to the project timeline, status reports, communications, etc. to improve transparency.

