



Greatness Awaits: Dump the Paperwork

There's a lot going on in K-12, so how people spend their time is important. Shifting from paper to digital solutions ensures schools are ready for whatever happens next.



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WHILE THE ULTIMATE JOURNEY IN K-12 leads to learning, the roads of operation are too often potholed with paperwork. Take the example of spend management, which can be a mixed bag. At one end of the spectrum are those districts that are mired in manual processes that involve moving literal paper – forms, receipts, invoices – from one desk or division to another and require actual blue-ink signatures. At the other end are school systems that have modernized their accounting and financial processes through software-as-a-service and digitized all aspects.

Guess which districts fared better when the pandemic closed our campuses, sent staff home to work, and nobody wanted to touch *anything*?

Getting More than Online Efficiency

The use of SaaS offers more than basic online efficiencies. The right kind of application provides greater visibility, tighter security and a much better user experience.

Greater Visibility

Manual processes offer little visibility into spending, expenses and cash flow. When paper-based invoices, purchase orders and receipts are scattered all over the accounting department, nobody really knows where they are in the payment cycle, creating lags in end-of-month or end-of-year settlement. True spend visibility lets district and school leaders make better, more accurate and timely decisions. To tighten up spending, they can choose to see invoices that are being routed for approval and adjust spend thresholds that require approvals. The reconciliation process can shrink from months to weeks. Best of all, those in charge of the money gain a better sense of how the district stands financially, project by project or overall. Decisions don't have to be blunt-force; they can be surgical in their precision: Not "No travel," but "No travel that includes upgraded seats."

Tighter Security

Concerns about cloud security linger, needlessly. The

reality is that SaaS providers can achieve a much better security stance by virtue of the resources they're able to commit. Take **SAP Concur**: The customers whose data we're protecting include government agencies, name brand corporations, major universities and school districts like the **Rochester City School District** in New York and **KIPP Bay Area Schools** in California. While typical school systems may be able to commit a small number of IT professionals to overseeing cybersecurity, we have a dedicated team of security specialists on the job.

Better User Experiences

We all live on our phones, and we expect to be able to get work done on them too. So, the idea of bringing in a new employee and pointing to a stack of paper and saying, "That's yours to deal with," is a non-starter – about as attractive as a cafeteria lacking enough trash cans. Being able to provide a user experience that's accessible from

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any location on any device, in a secure format, with native applications offers a huge advantage over processes that need to be accomplished on premise.

Maximizing Rebates, Eliminating Fraud

Envision this scenario: Requests for payment are sent in via online interface or digitized *en masse* through a designated service center. The data is vetted to make sure vendors are approved and expenses fall within the expected range or amount. The documentation is immediately tagged for the proper workflow, being approved at each level through a

mobile app or computer application. Approvers can be added or removed from the workflow list as staffing or delegation needs change. Those who sit on approvals too long can be notified that the clock is running. Likewise, managers can be alerted when people on their team try to shove payments through without adequate controls or documentation in place.

As a result, the right invoices are paid on time, without incurring penalties or losing out on possible rebates offered by the vendors. Any physical space dedicated to holding onto paper documentation can be dedicated to other purposes.

On the expense side, schools can eliminate adult arts-and-crafts. No more having to collect expenses and tape them onto a sheet to share with accounting. Now, with an app like SAP Concur's Expense, the spender can capture of an image of the receipt with a smartphone and have the app collect all the data from the receipt. Then the software can analyze the contents to categorize it and apply artificial intelligence to understand what the expense is for. It will also identify patterns in spending and suggest areas for savings or areas for concerns, such as fraudulent or mistaken behavior.

Relief Funding Requires Oversight

Right now, many districts are awash with federal and state

relief dollars. The primary purpose is to secure the safe return of students to class and to address specific areas such as learning loss and social and emotional needs. A lot fits under that umbrella – cleaning supplies and HVAC gear, professional development for teachers, new curriculum, new hires in strategic roles, hardware and hotspots, and the list goes on.

However, the funding comes with an obligation: Schools and districts are expected to spend it responsibly. The use of a program like Concur SAS for expense management makes the work of spend reporting effortless. The ability to provide audit trails is immediate and as granular or consolidated as the auditor needs.

There's a lot going on in K-12 right now, and how people spend their days is important. It's time to replace paper-based processes with digital solutions so schools can continue experiencing amazing transformation – and be ready for whatever happens next.

Jim McClurkin serves as senior director for state and local government at SAP Concur, with national perspective on the needs of K-12. He specializes in being able to clearly articulate a product or solution's value and the positive impact it will have on a client's operations and bottom line.



AUTOMATING EXPENSE MANAGEMENT PROCESSES WILL HELP YOU:

- A. Stretch budget dollars
- B. Comply with regulations
- C. Help students succeed
- D. **All the above**

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