A Case Study

► **Process Improved:** Travel Expense Reports and External Requisitions

► **Unit (s):** Division 03 - Business Services

► **Customers of the Process and Their Needs:** Administrative Staff Campus-Wide

► **Problem/Opportunity Statement:** Many of our processes, such as the those involving Travel Expense Reports and External Requisitions, can be confusing to customers because they contain many exceptions to accommodate the various business scenarios of a large campus environment. Targeting different areas of campus through focus groups allows us to get customer perspectives on exactly where certain processes become difficult.

► **Changes Made:** Tutorials created for Travel Expense Reports and External Requisitions

► **Results:** The tutorials received an overwhelmingly positive response from campus. Units processing these forms reported fewer errors and help calls as well.

► **Lessons Learned:** When building resources for our customers, it is vital to get input from all the different areas of campus as well as the job positions within those areas (i.e. administrators, faculty, financial specialists, LTEs, etc.).

► **Next Steps:** Business Services will continue to use campus input to develop resources that help customers with our processes. A Payment to Individual Report (PIR) tutorial is slated for rollout this summer.

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► **Additional data on the process:**
  