



Integrated Workforce Experience Case Studies

Cisco Finance: My Expenses Application

New application for creating expense reports implemented in a collaborative community environment transforms the user experience.

Executive Summary

Business Situation and Challenge:

- Streamline the process for creating expense reports, and improve the user experience
- Develop a solution that complements existing expense reporting tool

IWE Solution and Benefits:

- Improves functionality and reduces the number of user errors when creating expense reports
- Expense transaction summary view in IWE and easy-to-use, intuitive interface streamlines report access, increases user satisfaction

Business Value / Metrics:

- An average 98 percent of participants in My Expenses usability study successfully created an expense report unassisted
- Employees can create a typical expense report in half the time using My Expenses
- Switching to My Expenses could have saved Cisco time valued at more than US\$1 million per quarter in its fiscal year 2011

Looking Ahead:

- First IWE application in a larger program to improve Cisco's overall expense management process
- Extend support for My Expenses functionality; add more user-friendly features

Business Situation and Challenge

In many organizations, creating expense reports is a time-consuming, often frustrating, task for employees. Most employees simply do not look forward to keeping track of and documenting all the expenditures that can be incurred on business trips, or when attending seminars, conferences, or even hosting a customer lunch. The situation is compounded for employees whose role requires them to submit expense reports frequently.

Employee feedback over time, as well as recent usability studies, affirm users' dissatisfaction with Cisco's existing process for creating expense reports, especially pertaining to tool usability, and the high volume of user complaints regarding audit and policy violations and support provided during the process. Cisco's Finance group sought a solution that would integrate with the backend infrastructure, complement the existing expense reporting tool on the corporate intranet, and significantly ease the process for employees when creating expense reports and entering common data before submitting their reports for final approval and validation.

Cisco was limited, however, in the modifications it could make to the existing expense reporting interface, and customization of the tool was not feasible and would take a year or longer to materialize. Instead, the Finance group identified Cisco's internal collaboration environment, the Integrated Workforce Experience (IWE), powered by Cisco WebEx Social, as the best platform to implement a solution that would not only complement the existing expense reporting tool but provide an environment that could significantly improve the user experience for creating expense reports.

The Finance group solicited help from the Communication and Collaboration IT User Experience team. The IT team conducted research to identify the various user groups of the existing expense reporting tool and their associated complaints, quantify the problems (for example, the time it takes users to

complete an expense report, the number of errors and requests for assistance during the pre-validation process, and user satisfaction), and facilitate in-lab usability studies.

IWE Solution and Benefits

Supported by user research, the Finance and IT teams focused on developing a solution in IWE that would:

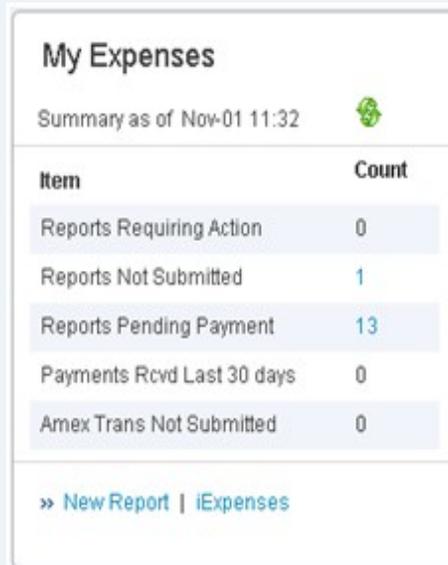
- Improve efficiency of the expense report creation process
- Reduce the number of errors encountered when creating expense reports
- Deliver interfaces based on the user's mental model (that is, design interfaces that represent the user's assumptions or actual experiences with the way they think expense reports should be created)
- Streamline critical areas of the expense report creation process, targeting the most frequently used and arduous areas based on user research

According to user testing, the My Expenses application in IWE is meeting the teams' productivity and user satisfaction objectives. Testing has shown, for example, that preparing an expense report for a typical two-day trip (including hotel, meals, and mileage) can be completed in half the time using My Expenses compared to the existing reporting tool. For more on usability research and results, see the Business Value / Metrics section.

With My Expenses, Cisco employees can easily access, edit, and review their expense reports before submitting them to the existing tool for final approval and validation. The My Expenses application provides employees with an at-a-glance-summary of the status of their expenses and most recent transactions (see Figure 1). With warning alerts and notifications, employees can instantly determine which items require action without having to log into a separate tool. To obtain the same information displayed in the My Expenses summary view using the existing tool, employees must log into the tool on Cisco's intranet and then page through various tabs and four separate tables on multiple screens, and might also need to filter and page through the tables further based on the number of items being expensed.

A hover-over feature gives users additional information about the items listed in the My Expenses summary view. For example, hovering over "Reports Requiring Action" with the cursor will display an expanded view of report details for the employee's five most recent transactions, including the date a report was last saved, the expense report number, purpose, amount, and any notes that were input for the report.

Figure 1. My Expenses Application Provides At-a-Glance Summary of Employee's Expense Transactions



Item	Count
Reports Requiring Action	0
Reports Not Submitted	1
Reports Pending Payment	13
Payments Rcvd Last 30 days	0
Amex Trans Not Submitted	0

[» New Report | iExpenses](#)

The summary view also shows the status of corporate credit card transactions (in this instance, American Express). It can take up to 48 hours, or sometimes longer, for corporate credit card transactions to show up in the expense reporting system. Most employees want to know if their American Express charges for a particular trip are in the system before they create an expense report. To view the status of these transactions using the existing tool, employees must log into

the tool separately on the corporate intranet and navigate through multiple steps. With My Expenses, employees can see if their American Express transactions have been submitted simply by checking the summary view.

Additionally, employees can initiate new reports directly from the My Expenses summary view. Because the application is integrated with the existing expense reporting system, when reports are ready for final approval and validation, employees can access the existing tool directly from the summary view without having to exit IWE.

User-Friendly, Calendar-Based Interface

The My Expenses application has an intuitive, calendar-based interface for creating expense reports that greatly improves the user experience (see Figure 2). This user interface reflects the way employees typically think about itemizing trip expenses, that is, all expenses, whether made on the corporate credit card or not, are recorded and organized by day together in one location. With the existing tool, corporate credit card expenses and non corporate credit card expenses are managed on separate screens, and inputting common trip expenses requires navigating through multiple pages and disparate tables. According to user testing, this more intelligent interface will significantly reduce the number of errors employees encounter during the expense report creation process, thus minimizing associated audit and policy-related delays.

Figure 2. My Expenses Application Calendar-Based User Interface

Create Report (Calendar Worksheet)

Expense Purpose: Create expense
Expense Template: Domestic Default Currency: EUR

Start your report by adding expense dates from **Calendar...** or **Amex Bill...** (0) Amex transactions not submitted

Tue, Sep 13, 2011	Wed, Sep 21, 2011	Thu, Sep 29, 2011	Fri, Sep 30, 2011
Hotel-Room & Tax 100.00	Air Travel-Departure Tax 100.00	Meals-Entertain-Public Sector 25.00	Comm-Home Phone 50.00
Add New Non-Amex Expense	Hotel-Room & Tax 20.00	Add New Non-Amex Expense	Add New Non-Amex Expense

Send to iExpenses Save to this Computer... Cancel = American Express Transaction

My Expenses streamlines areas of the report creation process that users identified as being the most critical and time consuming, including itemization for hotel, car rental, mileage, and multiple-attendee meal expenses. Streamlining these tasks not only improves the efficiency of creating reports but also reduces the number of errors that contribute to potential policy violations.

My Expenses Phased Rollout

At the time the My Expenses application was ready to launch, it was the most complex employee services application that had been introduced in IWE. As such, the Finance team decided to roll out the application in phases, with 750 employees globally being given access in the first two months. These were predominantly high-volume users of the existing expense report tool. The employees were asked to create expense reports using the new application, and provide feedback regarding the process, features, and user experience.

The rollout was accompanied by a post in the IWE community that provided users with comprehensive training materials, links, and support information for the My Expenses application.

Business Value / Metrics

My Expenses was planned, developed, tested, and ready for initial rollout in five months. Extensive user research included a heuristic evaluation of the existing expense reporting tool, user experience surveys for relevant areas of the existing and My Expenses application in IWE, and usability studies conducted in a lab setting for both the new and existing tool.

Heuristic Evaluation

Usability experience experts evaluated interfaces in the existing expense reporting tool based on industry standards and recognized usability principles and user experience design. A report was prepared compiling the potential usability issues with recommendations.

User Experience Surveys

The Software Usability Measurement Inventory (SUMI), a 50-question, industry standard user experience survey, was conducted for both the existing expense reporting tool and My Expenses. SUMI questions relate to aspects of usability including efficiency, affect, helpfulness, control, and learnability. Additionally, the System Usability Scale (SUS), an industry standard survey with fewer, but different, questions than SUMI, was conducted for My Expenses (SUS was not available for the existing tool). Scores derived from these surveys are used to assess user satisfaction and overall quality of a particular tool.

On the SUMI survey scale, a score of 50 is considered acceptable, and 75 is the highest score possible. In addition to the expense reporting tools, Cisco has collected SUMI scores for several of its products. The SUMI score for My Expenses was 65, the third highest score attained at Cisco and the same score achieved by Google.com. The last benchmarking of the existing expense reporting tool yielded a score of 40, which is considered poor / fair on the SUMI scale. For the SUS survey, My Expenses scored 84, which is considered an excellent rating.

Usability Study

After initial design of the My Expenses prototype was completed, the Communication and Collaboration IT team conducted a usability study to evaluate ease of use, task-based functionality, user preferences, and overall user satisfaction with the new application. Eleven usability sessions were held with recruited Cisco employees who were moderate- to high-volume users of the existing expense tool. My Expenses results were compared with results from a usability study conducted for the existing tool. Among the metrics included in the usability study were the following:

Success / completion rate. A task was not considered successful if the participant was unable to correctly perform the task, gave up on the task, or had to be shown by the facilitator exactly what to do. With My Expenses, an average 98 percent of the participants successfully completed all of the tasks required to create a report unassisted.

Errors and assists. The number of errors and requests for assistance during the report creation process using My Expenses was dramatically lower than those encountered by employees using the existing tool. While this finding does not preclude errors from showing up when final expense reports are submitted to the existing tool for policy and rule validation, it is an indication that the number of policy violations during the report creation process will decrease overall.

Time on task. The report in MyExpenses had three times the expense complexity of the report used in the study for the existing tool, but it was still completed by users in slightly less time.

Independent from the usability study, the IT User Experience team conducted subsequent time comparison tests on the new and existing tools, simulating creation of a report for a typical two-day trip with 11 expenditures including hotel itemization, meals, and mileage (both corporate credit card and non credit card transactions). The tests demonstrated that employees can complete a typical expense report in half the time with My Expenses: 4 minutes, 50 seconds versus 8 minutes, 51 seconds with the existing tool.

Extrapolating this time savings into dollars, Cisco estimates that switching to My Expenses can save the company time that is valued at US\$1,157,760 per quarter (based on the total number of expense reports in Cisco's fiscal-year quarter November 2010 through January 2011, and a blended hourly rate for standard, director, and vice president positions).

About IWE

Integrated Workforce Experience (IWE) is an internal Cisco collaborative initiative, encompassing business process, culture, and technology.

IWE allows employees to more effectively connect, communicate, and collaborate with subject matter experts, colleagues, and communities, as well as share information to help accelerate growth, encourage innovation, and create sustainable productivity.

Cisco WebEx Social, the underlying platform for IWE, is Cisco's own product, which is being sold to customers and partners.

Looking Ahead

My Expenses is the first application in a larger program to simplify and improve Cisco's overall expense management process. The Finance and IT User Experience teams are working on extending the support for existing My Expenses functionality, and adding more user-centric features to further simplify and reduce the time required to manage expense reports.



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