



FLOWCHARTING CASE STUDY AND PRACTICE EXAMPLE

After reading the scenario, create a flowchart of the TER process.

A DAY IN THE LIFE OF A TER

Today is Wednesday, September 26. Anna is a member of the Primordial Studies Department. She returned from attending a conference in Toronto on September 17, 2001. She brought her receipts and ticket stub to Chris, the department administrator. She asked Chris if her TER could be processed as soon as possible because the trip had been very expensive and her credit card bill would be coming due soon.

Chris placed the receipts in the mailbox of Terry, the individual in the department who does TERs. Terry was out with strep throat and wasn't able to return to work until Tuesday, October 2. Terry started working on Anna's TER but after being out sick for a week, wasn't able to spend time on it until Thursday.

Terry noticed that Anna didn't have a receipt for the taxi rides to and from the airport which were each over \$30 and thus required a receipt. Terry called Anna and left a message about the missing receipt. Ann called back the next day saying that she didn't have a receipt, so the TER would have to underclaim what she spent. The TER was finished on Friday, October 5.

When the TER documents were returned to Anna's mailbox for her signature, Anna had already left the office for the day to teach her classes. Anna herself wasn't in the office Monday due to a scheduled vacation day. She returned on Tuesday and signed the TER and returned it to Terry. Terry put the signed TER in the chair's mailbox. The chair left to present at a national conference without checking the mailbox and would not be returning until the following Monday, October 15.

The chair signed the TER on Monday as hoped and returned it to Terry to send to Accounting Services. Terry put the TER in an envelope and it was picked up by the Inter-D mail on Tuesday. The TER was received by Accounting Services on Wednesday, October 17. Anna received her reimbursement check on October 24, 2001.

On the next page, try creating a top-down or deployment flowchart or a stepchart for the process.

Before you flowchart the TER process, think about these questions:

1. Where does this TER process begin?
2. When is the process completed?
3. What are the major steps in the process?

After you have flowcharted the TER process, ask yourself:

1. What do you observe as you look at the process?
2. Are there particular places in the process where you see avoidable delays?
3. Are there any improvements to the process that might lessen the overall time required?

(process name)

(date)