

REAL SUCCESS

Curo Group – Case Study



CASE STUDY – CURO GROUP

Profile:

A housing association and house-builder based in the Roman City of Bath in England, Curo provides great homes and high-quality care and support services across the West of England. With more than 25,000 customers, Curo manages over 13,000 homes and is building hundreds of new homes every year.

Curo is one of the largest landlords in the South West, with a diverse portfolio of affordable and market-rented homes. Its mission is to provide great homes, support communities and improve lives.

Challenge:

Curo wanted to improve the submission, approval and management of employee expenses claims for its 500+ employees, many of whom are mobile or remote users with limited or no access to desktop/laptop hardware.

Having already deployed Office 365 for Curo, TSG was then appointed to design and implement a solution using the Office 365 platform.

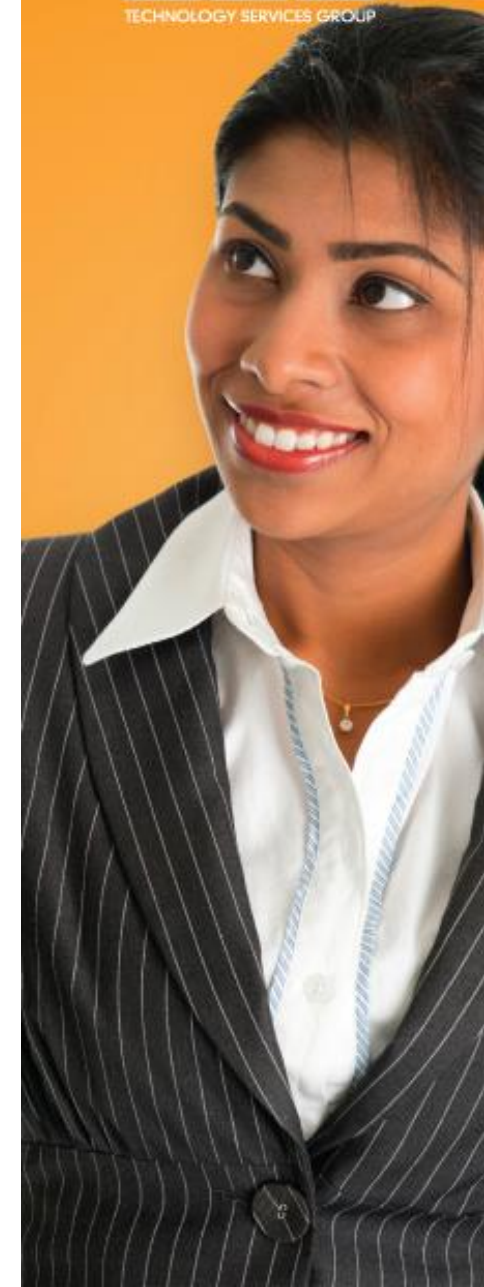
Solutions:

Requirements were gathered via a joint workshop. The design produced by TSG was given the green light by Curo Group.

The solution was built on a platform comprising SharePoint, PowerApps, Flow and Power BI.

Industry:

Housing



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SharePoint:

SharePoint lists were used as the data store for all elements of the solution including expense categories, expense submissions, user permissions etc. Storing the data in SharePoint Online ensured the data was secure and met the relevant compliance requirements such as GDPR.

The screenshot shows a SharePoint list titled 'Expenses' with the following data:

Title	Description	Policy Notes	Nominal Code	Groups	Rate_Qty
Food & Drink	Breakfast, Lunch Dinner and Refreshments		1	Group 1, Group 2, Group 3, Group 4	No
Training	Training Course costs paid for directly by employees.	Such expenses require Line Manager approval prior to submission.	2	Group 2, Group 3	No
Parking	General Car Parking.	Airport / Rail Station parking over 24 hours in duration must be via Long Stay option if available.	3	Group 1, Group 2, Group 3	No
Mileage - Company Car	Enter the journey distance rounded up to the nearest mile. Sufficient information is to be provided to allow checking of distances using Google Maps e.g DH3 1FH to TSG Leeds return.	Random checks will be made via Google Maps	4	Group 1, Group 2, Group 3	Yes
Mileage - Private	Enter the journey distance rounded up to the nearest mile. Sufficient information is to be provided to allow checking of distances using Google Maps e.g DH3 1FH to TSG Leeds return.	Random checks will be made via Google Maps	5	Group 1, Group 2, Group 3, Group 4	Yes

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SharePoint:

SharePoint was also used to host the expense management portal where desktop/laptop users were able to submit expense claims and managers were able to process their staff expense claims.

The screenshot displays the SharePoint expense management interface. On the left is a navigation menu with 'User Options' (My Expenses, My Approvals with a notification badge '1'), 'Admin Options' (Manage Categories, Manage Users, Manage Companies), and a 'Complete Approval Task' button. The main content area shows a claim summary for 'Tony Hughes Dec 2017' with a total value of '£31.10'. The claimant is Tony Hughes, the start date is Wednesday, August 1, 2018, the status is 'Submitted', and the company is TSG O365. There are no approval comments. Below the summary is a table of expense items:

Description	Category	Expense Date	Line Value	Status	Receipt	Actions
Dinner	Food & Drink	Wednesday, September 12, 2018	£5.00	Submitted		Approve Reject
Oldam Trip	Mileage - Company Car	Wednesday, September 12, 2018	£26.10	Approved		Reset

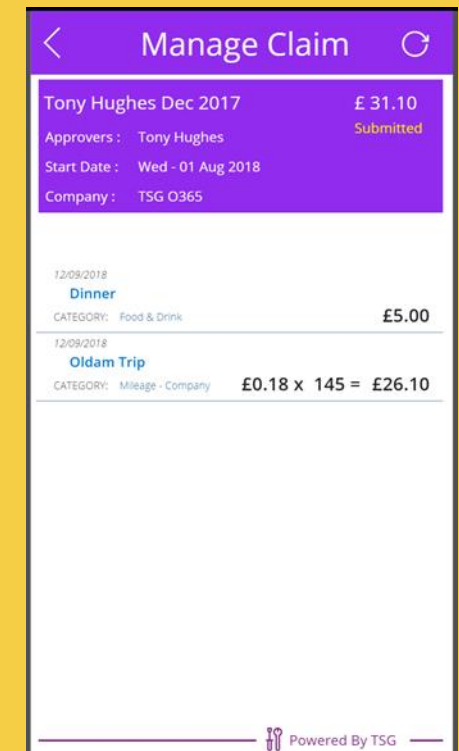
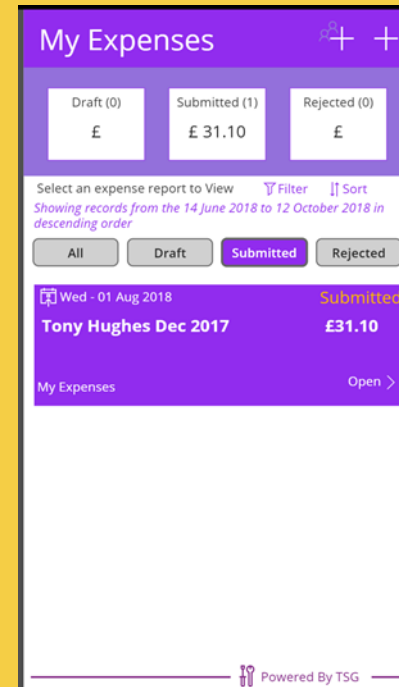
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PowerApps:

PowerApps provides the mobile workers with their expense solution interface where they can create and submit expense claims. A PowerApp was created using the SharePoint lists as its data source.

Microsoft Flow:

Workflows were created in Microsoft Flow for manager approval, claimant notification and re-submission processes.

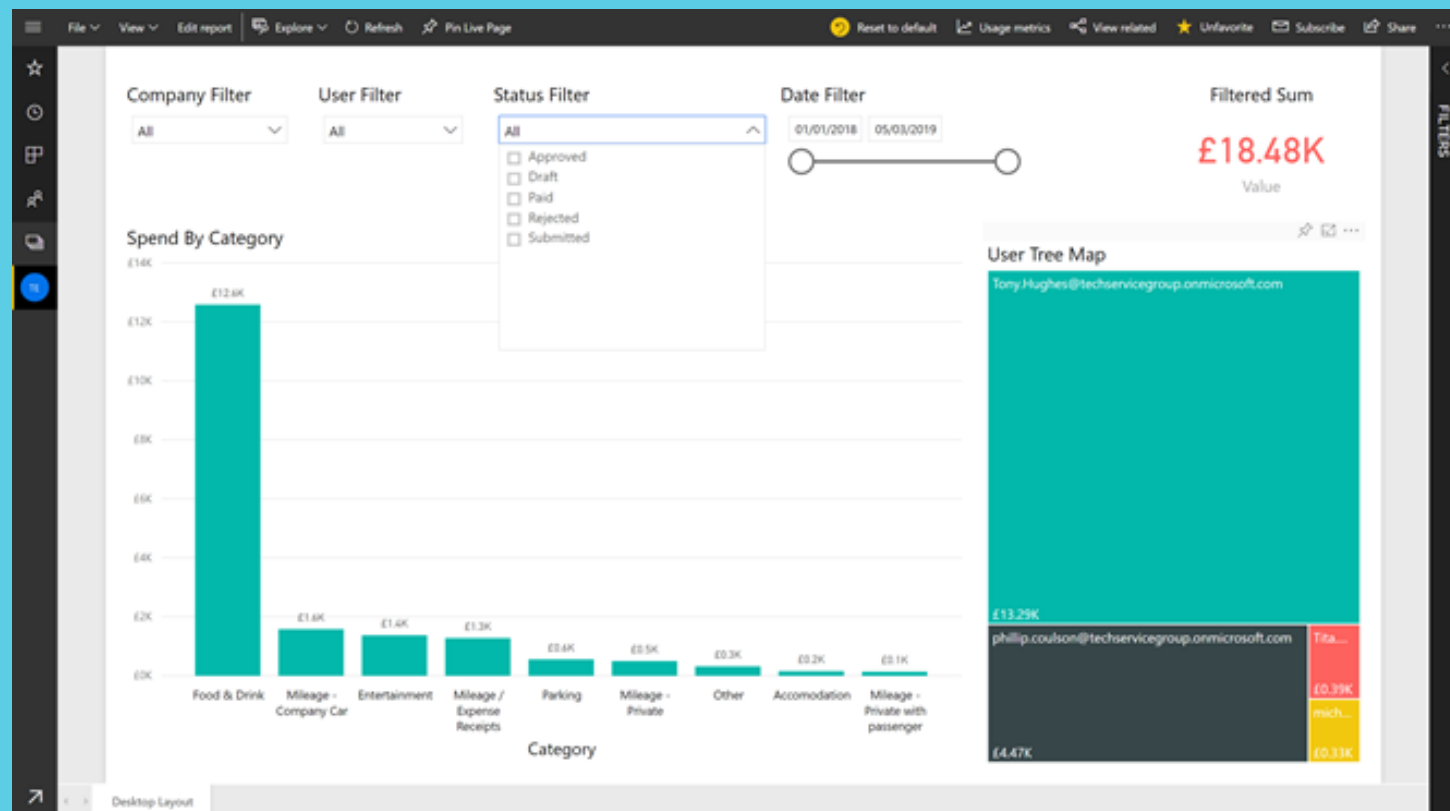


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Power BI:

Power BI was used to create an expense analysis dashboard for use by the Finance and Senior Management teams at Curo Group. The dashboard is integrated into the relevant Microsoft Teams environments to enable easy access to insights and trends.



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