

CASE STUDY

# Power Platform

Teenage Cancer Trust



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*“The work Smartdesc did on our Incidents and Complaints reporting has provided us with a much more efficient system, that encourages users to engage with the progress, helping us to capture learnings as an organisation. It has made the workflow simpler and more efficient – definitely a win for us.”*

**Helen Harris, Head of Fundraising Standards and Operations, Teenage Cancer Trust**

CASE STUDY

# The Project

## Challenge

Teenage Cancer Trust is a cancer care and support charity for young people established in 1990. Their team includes office-based staff, volunteers, healthcare professionals and support teams for their NHS hospital units.

Teenage Cancer Trust approached Smartdesc to find a solution to both their Incidents & Complaints and Expense Claiming processes.

Their previous Incident and Complaints management process was incoherent, which was doubling their workload through poor user access and manual information input. There was also no role-based security setup in place and a need for greater data protection.

Raising expense claims was also a time-consuming manual process for staff. The Finance Team had to collect any missing data afterwards and create Finance reports in Excel for each claim.

## Solution

The Smartdesc team successfully introduced two new PowerApps at no extra license cost. This solved both previous manual processes and resulted in improved security and staff productivity. This work included:

- Implementing custom Microsoft Power Apps canvas apps, complemented by automated solutions built on Microsoft Power Automate
- Reviewing the Incidents & Complaints process to streamline the journey, eliminating unnecessary and/or redundant steps and introducing an automated solution
- Digitising and centralising all Expense Claims with automatic approvals and rejections
- Adding an automation that automatically creates internal Finance reports as soon as an expense claim is approved
- Enhancing security and access with coded front-end and custom Dataverse tables

- Integrating SharePoint as a database to centralize all information and enforce role-based security
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- Developing a flow to automatically store and centralize data in SharePoint and, upon submission, send an approval request to assign incidents and/or complaints to the appropriate individuals/team

## Outcomes

- ▶ Fast and integrative solution thanks to Power Apps' low code app creation
- ▶ Simple and manageable maintenance cost
- ▶ Overall improved work performance and productivity
- ▶ Significantly reduces staff input, freeing them up to work on other projects
- ▶ Reduced occurrence of human error due to nature of automation
- ▶ Microsoft Dynamics 365 reporting and safe storage capabilities
- ▶ Easy, appropriate, and functional user access according to granted security role

