

# Staff and citizens come first with an agile and adaptive Unit4 finance system



## Halton Borough Council



**Halton Borough Council is a people organisation. The local authority's engaged, expert staff are committed to delivering joined-up, high quality public services that meet the needs of local citizens.**

Unit4 is a cornerstone of that strategy. An adaptive, forward-thinking Unit4 Enterprise Resource planning (ERP) platform is creating a single, unified financial system shared securely with everyone across any device. Automated business processing is optimising efficiency, supporting change management, and freeing resources to concentrate on service-focused delivery.

Key benefits include:

- Reduced the number of invoices processed manually by 80,000pa
- Cut purchase order processing time significantly
- Access to Real Time Information in a Self Service Environment.
- Supported people-centric services delivery

### Agile and efficient digital public services delivery

Halton Borough Council has a clear public services remit: to deliver joined-up, integrated public services focused on local citizen needs. "Everything the local authority does is focused on driving a fast, efficient citizen and employee experience," explains Gaynor Bullock, the Unit4 ERP System Principle Officer at Halton. "Technology has a crucial role to play in our digital-first strategy, with data being used to ensure everyone in the local authority can use accurate, timely data for decision-making."

This is where Unit4 comes in. Since 2004, the Council has relied on a best-in-class Unit4 ERP platform to provide complete, automated visibility and control over finance and income management, procurement, and budget planning.

According to Gaynor, the key advantage of Unit4 lies in its simplicity and flexibility. "Unit4's universal configurability make it ideally suited to a public authority like Halton," she says. "Our teams can quickly and easily automate processes, while maintaining complete insight into every financial procedure – from record to report. Previously, for example, we processed over 95,000

#### Industry

Public sector local authority

#### Location

Halton, U.K.

#### Size

130,000 citizens

#### Product

Unit4 Enterprise Resource Planning (ERP)

#### Challenges

**Reliance on fragmented, overlapping finance processes made it difficult to create a complete accurate picture of operations, delaying decisions and inhibiting change.**

#### Key metrics

**80,000**

Manual invoices now processed automatically every year

**Days to hours**

Reduced time to email out purchase orders to supplier

**“Unit4 is ideally suited to a public authority like Halton. Our teams can quickly and easily automate processes, while maintaining complete insight into every financial procedure. And it goes back to that citizen-centricity. Our staff can shift from repetitive, manual tasks to finding new ways to deliver better public services.”**

**Gaynor Bullock**

Unit4 ERP System Principle Officer

invoices manually every year. Now, as invoice processing is almost entirely automated, the number has reduced to 15,000 pa. Also, with the introduction of self-service requisitioning and an automated approval process, purchase orders are emailed out to suppliers within hours.

This agile, end-to-end process automation means the Council’s staff spend less time on low value, repetitive tasks and more time on meaningful, high value work they care about and enjoy. “It goes back to that citizen-centricity,” says Gaynor. “Our staff can shift from repetitive, manual tasks to finding new ways to deliver better public services.”

### **Rich, self-driving functionality, adaptability and reporting**

The Unit4 ERP Financials module is an ideal barometer for the platform’s rich, self-driving functionality, adaptability, and reporting capability. The Financial Management Team can make decisions with live accounting results and real-time variance analysis, have oversight into all transactions, and can review activity across different operational dimensions, such as Council service, district, or spend category.

“Unit4 combines transactions, accounting, analytics, and audit in one system, empowering the Council’s decision-makers with timely financial and business insight they can act upon – all from multiple devices” says Gaynor.

Unit4 ERP enabled the transformation of Procurement in Halton. Gaynor said, “The ability to categorize suppliers and product codes enabled us to output detailed analysis of Council-wide spend. This and the introduction of a Procurement Step into the requisitioning and supplier workflow processes give us a single, unified view of every supplier, so we can see who we have contracts with, the value of contracts, our spend, and much more. This granular self-service reporting plays an important role in driving efficient procurement and ensuring our citizens receive best-value services”

Gaynor also highlights the value of Unit4 in income management. The PCI DSS compliant system manages the receipt of payments from any channel, with payments automatically allocated to the cost

centre. “When a citizen pays their council tax online, by phone or in a kiosk, for example, Unit4 manages that payment process, updating all the relevant systems automatically. There’s no manual intervention.”

This intuitive ERP platform has been so successful at Halton that they now host the Unit4 ERP for Sefton Council and Merseytravel. The organizations work collaboratively to share ideas and to reduce maintenance and development costs. “It’s very easy to connect their data to our Unit4 deployment, such as the general ledger and accounts payable. We are standardizing our operations and improving process efficiency – so it makes sense to share that success,” says Gaynor.

