



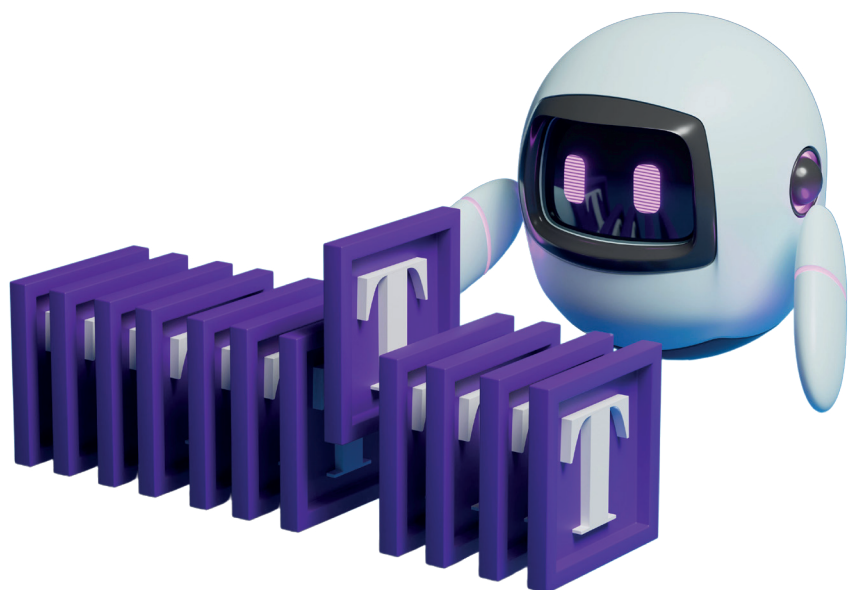
# Unit4 and AI

CREATING BETTER PEOPLE EXPERIENCES  
THROUGH PRAGMATIC, OPTIMIZED AI



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# Unit4's AI mission

The introduction of AI and automation marks a pivotal shift in the way ERP systems function and drive productivity, enhancing their capability to process large volumes of data, automate routine tasks, personalize experiences, and provide insightful analytics. The integration of this technology addresses the inherent limitations of traditional ERP systems and unlocks tremendous potential for improved decision-making, operational efficiency, and a more intuitive, responsive user experience. This evolution leads to a more adaptive, intelligent, and user-centric ERP, introducing new avenues for organizational growth and competitiveness.

At Unit4, our focus is people. Since 2017, we've been dedicated to transforming the ERP landscape by integrating AI and automation, empowering service-centric organizations and their teams to concentrate on what really matters. Our strategy delivers modern, intelligent ERP solutions that simplify workflows, enhance productivity, and solve real challenges, making 'getting work done' not just easy, but intuitive and effective.

Our philosophy centers on Human-Centered Design and the practical application of AI, tailoring our Smart Experiences and automation strategy to meet the unique needs of our users. By enhancing key operations in finance, planning, and human resources, we aim to significantly reduce the time and errors involved in tasks like invoicing, payroll, expenses, and absences. Our goal is to automate 50% of ERP tasks within the next three years, prioritizing solutions that accelerate task completion and improve precision, directly empowering users to work more efficiently and effectively.

## Unit4 AI Goals:

# >30%

reduction in time-on-task

# >50%

reduction in errors with >60%  
increase in speed to resolution

## Our focus areas for high impact

**Efficiency Enhancement:** Continuously improve and expand our utilization of virtual assistants to streamline tasks and automate data input in finance, procurement, and payroll, reducing manual labor and enhancing productivity.

**Accuracy Augmentation:** Expand AI-driven error detection and anomaly detection mechanisms to ensure precision in critical functions like accounting and payroll, while leveraging AI for data analysis to extract actionable insights in areas such as FP&A and project staffing.

## Our AI Philosophy

**Empower Human Potential:** Continuously develop technologies that augment and enhance human activity, boosting the potential for what your people can achieve with their ERP.

**Pragmatic AI Integration:** Our approach to adopting has always and will continue to be a pragmatic approach, deploying technology thoughtfully to enhance process efficiencies and solve complex organizational challenges for mid-market service-based organizations.

**Human-Centered Design Excellence:** Embed a steadfast commitment to human-centered design, placing our users' needs at the forefront, driving streamlined operations, higher task completion rates, reduced task time, and elevated customer satisfaction as our constant benchmarks.

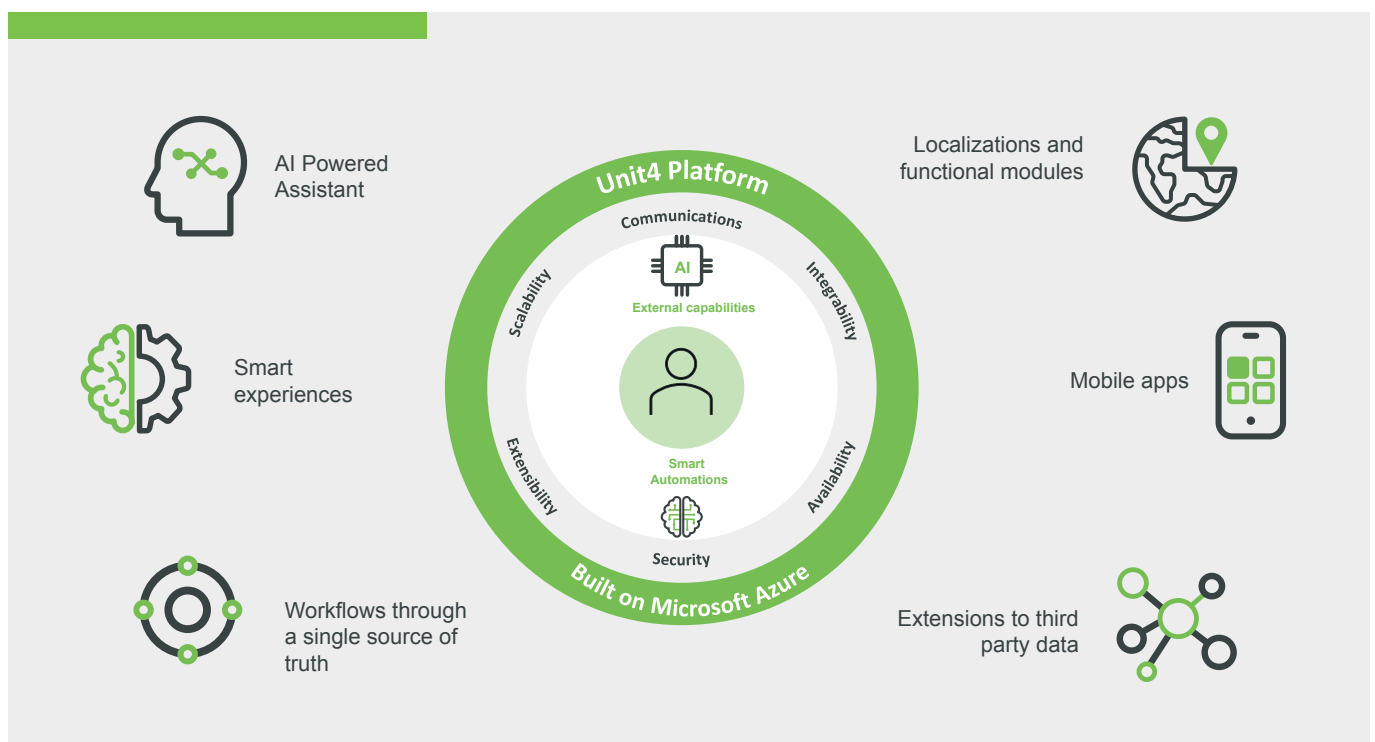
As we continue our journey to realize this vision, Unit4 is not merely committed to revolutionizing ERP experiences; we're making AI and automation a human-centered evolution. Our goal is not just technological progress but holistic empowerment for organizations and individuals in their service-centric pursuits.

As we navigate the possibilities and address the challenges of AI, our primary goal at Unit4 is to maintain human oversight and build user trust through AI models that are transparent, reliable, and effective. This white paper details how we are turning these ambitious goals into tangible realities, aligning our technology with the human-centric values of both our organization and customers. Our mission involves constant innovation and the integration of advanced AI and UX best practices into our ERPx system. By automating meaningful tasks and enhancing user satisfaction, we empower our customers to achieve greater operational efficiency and strategic success.

# A modern platform to support the organization

We're continuously investing in our platform, which leverages Microsoft Azure platform capabilities, to provide Unit4 customers with the latest technology to enable success. We've built a scalable and flexible architecture that enables us to leverage AI capabilities through a focus on data and an API-first approach.

## Next-gen Cloud platform that adapts to your needs



Machine Learning and advanced AI technologies, such as Large Language Models (LLM), are key to enhancing our ERP solutions. Our integration of LLMs like ChatGPT enables more natural and intuitive user interactions, aiding in effective information retrieval. These technologies undergo rigorous testing and development, ensuring seamless integration with existing ERP functionalities and furthering our commitment to innovation.

For example, with Unit4's Extension Kit, you can seamlessly connect your current external applications with your Unit4 ERP system. This app now uses generative AI to assist non-technical users in creating new integrations and automation by translating natural language into complex data flows.

Furthermore, App Studio, our no-code tool designed for customers to construct their own interfaces and applications (part of Unit4's Extension Kit), harnesses the AI capabilities integrated within the Unit4 platform.

But more specifically, how can this technology help your organizational functions?

### Examples of Unit4 Smart Automation Services live or coming soon:

- **Form Analyzer:** Examines content of forms to identify unusual information that requires review.
- **Smart Value List:** Suggests values based on users' past selections, prioritizing relevant suggestions.
- **Smart Classification:** Automates the categorization of objects by recognizing and grouping.
- **Fraud Detection:** Analyzing transaction data for patterns and anomalies.



## Finance: Enhancing accuracy, efficiency, and impactful analysis

When it comes to the financials, accurate and timely processing is key for any organization. Our aim is to drive enhanced user experiences without compromising on accuracy. For example, we employ Machine Learning for anomaly detection in invoice processing, streamlining financial operations, and reducing errors. We are working on automating key financial tasks such as bank statement processing, direct debits, and tax determination, utilizing AI to recognize patterns and aid your people in delivering accuracy at speed.

## Projects: Streamlining essential processes and optimizing resources

To ensure your projects are hitting key target metrics such as budgets, timelines and quality we're utilizing advanced AI capabilities to streamline data input and processing. This ensures the efficient matching of individuals possessing the requisite skills to your project assignments, thereby conserving valuable time and energy for your project and resource managers. We're combining core data from across your organization to help you utilize your resources in the best ways, ensuring successful completion of your projects.

## Procurement: Optimizing Invoicing

By leveraging AI, we aim to substantially enhance efficiency, accuracy, and cost-effectiveness within the invoice processing domain.

AI-powered automation optimizes recurring tasks and approvals, minimizing manual efforts and maximizing accuracy. Intelligent data extraction capabilities facilitate quicker processing and analysis of invoice data. Additionally, AI can detect anomalies or discrepancies in invoices, reducing the risk of financial loss or fraudulent activity. Such proactive measures contribute to a more robust and error-resistant procurement system.

Our integration of AI technologies not only expedites the invoice processing cycle but also creates a transformative shift towards a more agile, data-driven, and strategically aligned procurement ecosystem.

### Unit4 AI Goals: Invoices

- 30% time reduction in handling invoices
- 50% reduction in effort required to resolve invoice issues
- 60% time saved on amending invoices with errors
- 50% reduction in time to identify invoice delays and responsible parties
- 40% faster response to supplier inquiries about invoices
- 50% quicker notification for new invoices in the system
- 90% increase in efficiency for multiclient invoice handling

## HCM: Utilizing your People through better planning and skills tracking

Your people are your biggest asset. We've been focusing on developing the user experience for employees, people managers, payroll administrators and HR leaders to improve the way you work through enhanced user interfaces and automation. Moving forwards we are evaluating the use of AI to support key areas such as skills management, where a central repository is maintained with new employee skills gained and rated both internally and externally. We can then see huge benefits in being able to perform accurate skills gap analysis to drive your staffing strategies and proactive recommendations for the right people to match your project requirements.

Helping you to utilize, motivate and retain your top talent, as the needs of your organization change over time.

### Unit4 AI Goals: Payroll Processing

- 30% time saved through streamlined processes.
- 50% fewer manual corrections, reducing errors and warnings

### Unit4 AI Goals: Expenses

- 60% increase in efficiency with fewer interactions required

### Unit4 AI Goals: Absences

- 31% more efficient through simplified interactions
- 55% faster completion of absence-related tasks
- 48% higher task completion rate, improving overall execution

## FP&A: Enabling better data visualization and storytelling

We're utilizing AI to help our customers to communicate insights from their financial data more easily using AI enabled FP&A tools along with smart assistance. Users will be able to identify trends at a glance and facilitate better decision making through enhanced understanding of the underlying data.

# User experience and human-centric approach

The key to leveraging AI advancements lies in our deep understanding of the unique needs of individual users within organizations. Our focus is on tailoring our ERP solutions to meet these specific requirements and challenges. By prioritizing the end users' experiences and the speed at which they can complete tasks, we ensure our technology not only keeps pace with the digital age but also drives significant improvements in efficiency and effectiveness across the board.

## Using customer feedback and data

At Unit4, we regularly gather customer feedback through various channels, including our community platform, user groups, and testing platforms. We also use research methods like ethnography to understand how users engage with our ERP applications in their workplaces. This valuable information guides us in shaping user experiences, refining AI frameworks, and enhancing system interactions.

Once we spot opportunities for improvement, we simplify ERP interactions using standard AI tools or custom machine-learning models. An example of these models suggest personalized options to users, making form-filling more straightforward. Other models identify errors or unusual patterns, promoting better decision-making and ensuring data integrity.



# 60-70%

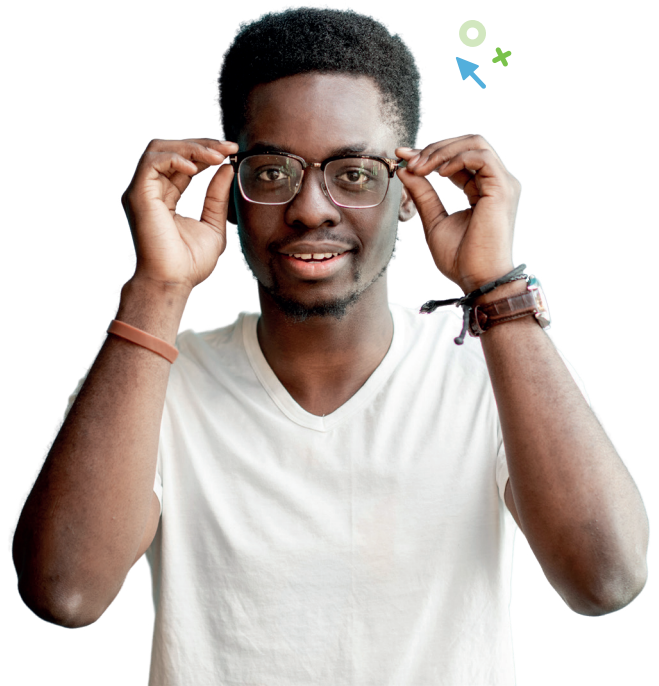
of work activities could be automated by current generative AI and other technologies.<sup>1</sup>

<sup>1</sup> Economic potential of generative AI | McKinsey

## Better user journeys through Smart Assistant

Another example of how we transformed user feedback into an innovative solution is the development of our next generation AI-powered smart assistant. This application is a direct response to our users' need for more intuitive and intelligent support within their ERP environment. It leverages AI to provide actionable insights and streamline workflows. The smart assistant can display alerts about issues detected by ERPx, offer smart recommendations based on data analysis, and facilitate easier communication by allowing users to chat with others involved in the workflow. Furthermore, the assistant has the capability to guide users in completing tasks and automating certain steps, increasing productivity and decision-making efficiency.

Our overall goal is to create adaptive, contextual experiences that focus on the real problems customers face. The successful integration of AI technologies into everyday work will result in a transformative impact on business processes and roles.



The screenshot displays two overlapping windows. On the left is a Microsoft Teams chat window titled 'ERPx Chat' with a message from 'Hey Amanda' regarding invoice issues. On the right is a web browser window showing the 'Unit4 home > Inbound Invoices' dashboard. The dashboard includes a summary of 'Inbound invoices follow-up' with 5 items in total, categorized by 'Error' (1), 'Overdue' (0), 'Need action' (2), and 'Added today' (1). Below the summary is a table with columns for Invoice number, Need action, Step, Status, Transaction ID, Due date, and GL lines.

Invoice number	Need action	Step	Status	Transaction ID	Due date	GL lines
1234059	No	Registered	Active	59080017	20 June 2023	3 of 3 ready
1234060	No	Registered	Active	59080014	18 July 2023	1 of 1 ready
InvSup-002	Yes	Registered	Parked	59080016	22 July 2023	3 of 3 need attention
23079	Yes	New	Error	59080018	24 July 2023	3 of 3 not started
100001	No	Registered	Closed	59080020	12 August 2023	1 of 1 not started



## Data Privacy, Security, and Ethical Considerations

At Unit4, our commitment to putting people at the center of AI innovation for ERP drives our approach. Upholding data privacy, security, and ethical considerations is paramount in our strategy. We strictly adhere to regulations such as GDPR and the EU AI Act, continuously updating our practices to align with evolving legal and ethical standards. Our security measures are robust, designed to protect against cyber threats and data breaches, thereby ensuring the security and privacy of our clients' data.

Moreover, we recognize the ethical implications of AI deployment, especially in decision-making processes. Transparency and accountability are core principles guiding our AI development. We prioritize clear communication with users regarding when, how, and why AI decisions are made. Detailed technical documentation and summaries of data sets are maintained to ensure transparency and mitigate biases. Compliance with EU copyright law is ensured, with detailed training content summaries published.

Accuracy is another key focus area for us. We strive to deliver reliable and accurate AI outputs, providing clarity on the level of accuracy and implementing mechanisms to monitor and maintain system accuracy over time. Human oversight mechanisms are also in place, allowing users to understand, monitor, evaluate, and override AI decisions when necessary.

In terms of data governance, we provide comprehensive documentation summaries on the data sets used for training, ensuring transparency and compliance with regulations related to personally identifiable information (PII). Additionally, our cybersecurity measures are tailored to mitigate risks appropriate to the circumstances. Technical solutions are implemented to ensure resilience against unauthorized attempts to exploit system vulnerabilities.

Our commitment to compliance extends to high-risk sectors such as the public sector, banking, and insurance, where adherence to best practices outlined in the EU AI Act is highly recommended. By prioritizing transparency, accuracy, and compliance, we aim to build trust with our users and maintain the integrity and reliability of our AI-enhanced ERP systems.

## Challenges and Future Outlook

As we continue to integrate AI and automation into our ERP solutions, we are mindful of the challenges that accompany such technological advancements. The key is to ensure the seamless integration of AI into existing business processes without disrupting the operational flow. Additionally, we must address concerns regarding the reliance on AI for decision-making, ensuring that human oversight remains a critical component. Another significant challenge is continuously evolving our systems to keep pace with rapid technological advancements while maintaining user-friendliness and accessibility.

Looking towards the future, we are very optimistic about the potential of AI and automation to revolutionize ERP systems. We anticipate further advancements in AI capabilities, leading to more sophisticated and intuitive ERP solutions, allowing us to deliver on our vision to provide pervasive self-driving ERP solutions.

Unit4's integration of AI and automation in ERP systems marks a transformative step in redefining enterprise resource management. Aligned with our AI philosophy, we are dedicated to constantly elevating the user experience, operational efficiency, and decision-making capabilities. Staying attuned to our customers' needs and technological advancements, we empower human potential, unlocking new possibilities for what individuals can achieve with their ERP. Our pragmatic approach to AI integration ensures thoughtful deployment, enhancing process efficiencies and addressing complex challenges faced by mid-market service-based organizations. Rooted in human-centered design excellence, our solutions prioritize users' needs, fostering streamlined operations, increased task completion rates, reduced task time, and heightened customer satisfaction—serving as constant benchmarks that guide us toward shaping the future of intelligent, adaptive, and user-centric ERP solutions.

For more information go to:

[unit4.com](https://unit4.com)

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