

In Business for You

Product Roadmap

Public Sector

January 2021



About this document

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People Platform (next 6 months)

Unit4 Integration Kit

Unit4 Integration Kit is the People Platform service that allows customers to easily integrate their Unit4 solutions with external applications.

Each integration Flow can reliably move messages among endpoints, do message validation, mapping, transformation and orchestration – often referred to as Enterprise Integration Patterns.

Value proposition

- Supporting end - to -end message tracking, including the acceptance or rejection of a message
- Managing secrets to fully automate an integration
- Can perform transformation and mapping of data to customize the integration to your needs

People Platform (future +6 months)

Unit4 Next Gen UI

Unit4 Next Gen UI is a toolkit that supports customers in creating new, responsive and modern screens that provides an answer to specific needs.

Value proposition

- Make the creation of new screens easy
- Allowing customer specific screens
- Extending the applications with new experiences

Unit4 Smart Automation Services

Unit4 Smart Automation Services is a People Platform Service that provides an easy-to-use platform responsible for the life-cycle management of Unit4 machine learning models. Unit4 Smart Automation Services provides a standard way of developing machine learning models to enable smart decisions for all applications within the Unit4 eco-system. The purpose is to provide a central place for products, applications and micro-services to request predictions based on the available historical data, from which to apply smart decisions accordingly.

Value proposition

Combining all knowledge and technology about AI will fuel machine learning/ AI use cases to be adopted in the People Experience Suite.

Wanda Insights Service

The Wanda Insights service knows what the user is doing and which information might be relevant to help the users with their work. Insights service compose a data set with information from different sources and send it back to the user application. I.e. a user might be looking at some supplier invoices to be approved or not, Wanda Insight service fetches older invoices from the same supplier to show some historical data of the same type of invoice, so the user know if the amount is as usual or has incremented compared with the previous ones.

Value proposition

Pro-active helping the user to accomplish the task at hand will boost user experience and generate instant value of its use.

ERP (next 6 months)

Planner API

The Planner API makes it possible to upload or update budget and forecast figures coming from other applications. This Restful API guarantees an easy and direct update of the data taking into account the security settings of the application.

Value Proposition

- Budget figures can become immediately available in the system even if they are maintained in other applications like your CRM
- This function is also used to deliver a good integration between the ERP Planner module and other Unit4 solutions like Unit4 FP&A

Easy User interface for manual upload of import and export files

With this function a user can easily upload import files from his own local machine or retrieve export files directly from the application ones they are generated, without having to go to an export directory. The access to the export and import locations is managed within the application securing who can have access to the file locations.

Value Proposition

- More efficient to use file-based import and export processes
- Securing the access to the files and their content which guarantees compliance to GDPR regulations
- Support for multiple import sections

Mobile Task handling

Enable the users to approve their tasks coming from the ERP on any mobile device via the digital assistant or directly in the web App.

Value Proposition

- The user can use the dead moments in the day in a useful way
- Dealing with the tasks wherever you are
- Free up time of the employee
- Less delays in processes

Configuration Manager APIs in Fundamentals

Various REST APIs which are needed for Configuration Manager to enable an easy deployment of the most time-consuming fundamental ERP 8 solution setup components like:

- Flexifield setup
- Information Browser definitions
- Attribute values

Value proposition:

- Easier and quicker deployment of the solution setup across legal entities and/or across different environments
- Securing a consistent solution setup

Document Archive API

The Document Archive API makes it possible to easily upload documents coming from other applications or to retrieve them from the ERP. This enables a multitude of integrations including integration with Electronic Document signing solutions.

Value Proposition

- No need for manual actions to have the necessary documents available in the ERP.
- Delivering the necessary information to the employee
- Make the work more efficient

Generic Batch Import API

The Batch Import API makes it possible to upload transactions or data in Batch via a modern and fully secure connection. This Batch Import API guarantees an easy and direct update of the data taking into account the security settings related to a Cloud application.

Value Proposition

- The data can be uploaded to the system in Batch.
- Especially useful when dealing with some legacy solutions who do not have direct interfacing capabilities
- Useful when it is preferred to process the data overnight

Configuration Manager

With Configuration Manager it becomes possible to transfer configuration elements between environments or between entities in the same environment. The transfer of this configuration is based on REST APIs who perform the necessary validations to guarantee consistent setup in the application.

Value proposition:

- Reduction of configuration lead time
- Lower cost and effort of implementing solutions
- Reduce the risk of manual mistakes, better quality setup
- Solution faster up to date with changing business needs

Smart Invoice Processing Service (SIP)

- enables process automation of incoming invoices with an account proposal based on identified patterns of historical data of previous processing
- A new workflow function which predicts the GL accounting analysis of incoming invoices
- The accounting prediction service is a self-learning invoice processing service that leverages Machine Learning capabilities with the Unit4 People Platform

Value proposition:

- to enable less hands-on work for accounts payable staff
- significant cost savings on processing incoming invoices and faster payments
- free up time to work on things that really matter

Statement Processing

- providing capabilities for automatic matching and reconciliation of incoming bank statements
- gaining high match rates based on predefined business rules
- manual matching of non-matched items
- processing of advanced payments
- processing of direct debit R-messages*
- powerful and easy to configure to meet specific business needs
- full traceability and audibility
- PSD2 ready (Open Banking)

Value proposition

- streamlining and automation of the accounting process of incoming bank statements highly reducing the need for manual labor intensive processing
- Improved integrated credit management capabilities in the Unit4 ERP web environment providing users with a better user experience

VAT reporting compliance (integration with Avalara VAT Reporting)

- a standard connector to Avalara's VAT reporting solution to secure VAT reporting compliance in many countries
- securing indirect VAT report filing to local tax authorities (in accordance with VAT-due principal)

Value proposition

- Making sure that our customers remain compliant to fast changing legislation
- Increase international footprint for us and our customers
- Secures a uniform VAT return filing process to tax authorities for different regions
- Provides a transparent VAT transaction treatment for many different VAT scenario's which are easy to implement in a consistent way
- Enabling the (local) partner ecosystem

NextGen payments

- Streamlining the process of outgoing customer and supplier payments.
- Define NextGen banking integrations which are loosely coupled

Value proposition:

- Decrease implementation costs and increase Time-to-Value
- Secure a consistent and secure remittance process
- PSD2 Ready (Open Banking)
- Enabling the partner ecosystem

Purchasing

Creating an enhanced user experience for the purchasing process. Browse your internal product catalogue easily, filter on and compare the product characteristics before entering your requisition.

Value proposition

- Easier and faster requisition decision making
- Improved user experience

Commitment accounting

The process of commitment accounting involves recording obligations to make future payments, at the time they are incurred. Commitment Accounting provides your organisations with an accurate overview of funds available to spend, before they are spent, and consequently the necessary financial information and tools to hinder potential budgetary overruns and maverick spending.

Value proposition

- Prevents users from wasting valuable time
- Supports faster and more accurate decision-making
- Prevents budget overruns early in the process

Purchasing additional functionality

- Supports key functions of the purchasing process

Value proposition

- Supports key functions for managing your product master file, Purchase orders, Internal orders, confirmations, goods receipt, and enquiries allows monitoring and analysis of purchase order activity.

Sales Orders functionality

- Supports functions for the sales process

Value proposition

- The opportunity to enter and submit sales orders and invoice them. Include possibilities to add discounts, price adjustments, etc.

Inbound eInvoices/Credit - (Integration with Pagero - PEPOL compliance)

- A standard connector to receive invoices from Pagero's invoice service solution to secure electronic invoice compliance in many countries
- Securing compliance with the PEPOL format as Standard electronic invoice format

Value proposition

- Making sure that our customer remain compliant to fast changing legislation
- Increase international footprint for us and our customers
- Provides a easy integration possibilities with a service provider/access point (PEPOL)
- Enabling the (local) partner ecosystem

Enable Contract accounting

The user is given the ability to create a framework of contracts, against which purchase orders and requisitions can be raised and purchase invoices can be validated. Contracts may be for the purchase of products or the purchase of time from contractors and consultants. Once a contract has been defined, all relevant costs should be derived from it, for use in other parts of Unit4 ERP.

Value Proposition

- Ensures that purchases are made according to pre-agreed rules, thus reducing costs.
- Ensures that all resources used in the organisation are properly managed, while automating business processes to save time and associated cost.

Mobile web app for time entry

Creating an enhanced mobile user experience. Enter your time worked on project assignments while on the go.

Value proposition

With the mobile app for time entry people can enter their time at any moment where ever they are, allowing them to focus on what's really important.

Timesheets API

The timesheet API supports integration with Unit4 mobile apps and 3rd party apps for time entry.

Value proposition

Standardized and stable data exchange with other (mobile) apps and services, both from Unit4 and 3rd party.

ERP (future +6 months)

Configuration Manager APIs additions

Various REST APIs which are needed for Configuration Manager to enable an easy deployment of additional fundamental ERP solution setup components like:

- Workspace setup
- Workflow
- Balance Tables
- Report variants
- Master file approval setup
- Timelines

Value proposition:

- Easier and quicker deployment of the solution setup across legal entities and/or across different environments
- Securing a consistent solution setup

Configuration Manager continued

With Configuration Manager it becomes possible to transfer configuration elements between environments or between entities in the same environment. With this release the capabilities are further enriched to allow the following:

- Upload of data from external sources into a package
- Compare the data from the source environment with the destination environment

Value proposition:

- Reduction of configuration lead time
- Lower cost and effort of implementing solutions
- Reduce the risk of manual mistakes, better quality setup
- Solution faster up to date with changing business needs

Field validations (New concept)

Field validations will provide some out of the box validations on fields like VAT registration nr, Bank account nr, , social security nr. Besides out of the box validations it will also allow the admin user to define new validations on certain fields. This feature aims to provide a wide number of field validations based on an internal logic but also based on external sources.

Value Proposition

- Field validations will limit the risk of having wrong values in the system
- Making processing of the data more efficient
- One common concept for internal and external validations
- Independent of the way the data is entered in the system
- One definition can be re-used in multiple functions/screens

Various Workspace enhancements

With this feature we enhance the functions in Workspaces making it more efficient in the daily use. E.g. properly dealing with unsaved changes.

Value Proposition

- Improve user experience of the end user

Flexifield enhancements

Flexifields are a much-used concept in the ERP as they allow to add company specific information to the standard Master Files, in Forms and in some cases even to transactions. With this initiative we want to further enrich the capabilities of flexifields by adding formula's, editable URL fields, dynamic layout on master files and copy rows in flexifield tables.

Value Proposition

- Improve user experience
- Support of more use cases
- Have more information available in a consistent manner
- Especially useful when working in a decentralized environment

Handling of confidential documents

The system already allowed to add security settings to documents connected to employees in order to guarantee confidentiality in the system. With this enhancement such confidentiality settings will also become available for other document types.

Value Proposition

- Protect documents added to the document archive
- Strong support for confidentiality
- Reduce the risk of unauthorized information access
- Better compliance to data protection regulation like GDPR

New concept to add Folders in the menu

With this feature it is possible to create custom menu folders in a user-friendly way. Especially for those organizations who created a multitude of custom menu items like for forms, it is useful to organize them in a proper folder structure.

Value Proposition

- A well-organized menu structure
- improving the efficiency of the employees by making it easy to use the menu.

NextGen direct debit collections

- Streamlining the process of direct debit collections
- Define NextGen banking integrations which are loosely coupled

Value proposition:

- Simplifying banking integrations for direct debit collections
- Decrease implementation costs and increase Time-to-Value
- Consistent and secure direct debit collection process
- PSD2 Ready (Open Banking)
- Enabling the partner ecosystem

Cash Accounting

Webification of the cash accounting module which is currently only available in desktop.

Value proposition:

- processing of cash accounting processes in a web environment
- cost savings - removes the need for Citrix

Smart Invoice Recognition Service (SIR)

- a micro service which allows data capture of scanned incoming invoices based on AI/ML technology to support the process of incoming invoices
- the service can extract structured data from an incoming invoice like invoice number, invoice date, invoice amount, VAT amount, order number, bank account number, VAT number

Value proposition:

- Reduction of manual entry errors
- significant cost savings on processing of incoming invoices and faster payments
- free up time to work on things that really matter

Purchasing Mobile

Mobile purchasing app with search functionality and requisitions entry including purchase lists, multiple row support with GL-analysis. Status overview of your purchases and goods receipt entry possibilities.

Value Proposition

New user experience for the users with mobility and flexibility to complete purchasing tasks with anytime, anywhere access.

Outbound eInvoices/Credit (Integration with Pagero - PEPPOL compliance)

- A standard connector to send invoices to Pagero's invoice service solution to secure electronic invoice compliance in many countries
- Securing compliance with the PEPPOL format as Standard electronic invoice format

Value proposition

- Making sure that our customer remain compliant to fast changing legislation
- Increase international footprint for us and our customers
- Provides a easy integration possibilities with a service provider/access point (PEPPOL)
- Enabling the (local) partner ecosystem

NextGen eCatalogue Import and Management

- Management of incoming electronic product catalogues. Administrate and compare differences with previous catalogues, verify and approve for publishing in the procurement solution or reject the catalogue.
- Restful API's for articles, purchase prices, article images, product groups and units.
- Securing compliance with the PEPPOL catalogue format as Standard electronic format

Value proposition

- Making sure that our customer remain compliant to fast changing legislation
- Increase international footprint for us and our customers
- Provides a easy integration possibilities with a service provider/access point (PEPPOL)
- Enabling the (local) partner ecosystem

Sales Order API

Restful API for Sales Order entry supports integration with 3rd party apps and systems for Sales order entries.

Value proposition

Standardized and stable data exchange with other (mobile) apps and services.

Punchout NextGen

- Makes it possible to setup a direct communication with a supplier webshop; punchout with automatic login, fill your shopping cart and post it back to the ERP purchase request.
- Punchout is a perfect functional compliment to the internal ERP webshop "Find products" that is filled with imported products to keep control of the spend in the company.
- Perfect for suppliers with a wide range of products and/or many price changes in short time periods.
- Securing compliance with the PEPPOL punchout format as well as other commonly used punchout protocols (Business standards) such as OCI (Open Catalogue Interface) and Xml.

Value proposition

- Making sure that our customer stay compliant to fast changing legislation
- Increased control of the purchasing for customers
- Provides a easy integration possibilities with supplier web shops.
- Enabling the (local) partner ecosystem

eOrdering

- A standard connector to send electronic orders to Pagero's service solution to secure electronic invoice compliance (in many countries)
- Securing compliance with the PEPPOL format as Standard electronic format

Value proposition

- Making sure that our customers remain compliant to fast changing legislation
- Increase international footprint for us and our customers
- Provides a easy integration possibilities with a service provider/access point (PEPPOL)
- Enabling the (local) partner ecosystem

Enable Subscription billing

Adding subscription billing supports your periodic process with multiple invoices during the timespan of a subscription. This automates this periodicity with the creation of periodical sales orders based on the details of the subscription. The created sales orders are then easily invoiced.

Value proposition

- More accurate billing.
- More efficient outgoing invoice processing.

Configuration manager API - Phase 1

Various REST APIs which are needed for Configuration Manager to enable an easy deployment of the Procurement solution setup.

On this Phase we are planning to include:

Product search configuration

product groups

number series

number types

number cycles.

Value proposition:

- Easier and quicker deployment of Procurement solution setup across legal entities and/or across different environments
- Securing a consistent Procurement solution setup

Project by project billing

Next to batch-based project billing, more extensive support will be added for project by project billing. This way billing can be initiated from a project allowing you to see what you get and make changes on the fly. Invoice layout can also be set by project.

Value proposition

- WYSIWYG experience
- More efficient outgoing invoice processing for single project invoices
- More intuitive way to do amendments to the project invoice
- Less cumbersome workflow

Enabling Global Projects

Allows users to share projects and subcontract work to other entities within the group. Ensure subcontracted work is transferred intercompany and billed in the project owning company.

Value proposition

- Reduced complexity and effort when entering time and expense
- More timely and accurate project reporting and forecasting
- Less inefficiencies in intercompany charging
- More accurate invoicing for the end customer

Enabling Project Financing

If there's more than one customer or client financing a project multi-client billing allows you to identify which customers/clients are to finance the project and set the rules for invoicing these customers.

Value proposition

- Accurately billing one or more clients for a single project initiative
- Clearer project financing setup and prioritization split
- Track changes in the project financing composition

Configuration Manager APIs Projects

Various Financial REST APIs which are needed for Configuration Manager to enable an easy deployment of the PCB solution setup.

Value proposition:

- Easier and quicker deployment of PCB solution setup across legal entities and/or across different environments
- Securing a consistent PCB solution setup

Global People Planning

Global people planning allows you to see the allocation of all the people that work in the company regardless of the legal entity they reside in and confirm and plan new assignments. This enables a complete company wide view of your people's skills, availability and utilization.

Value proposition

- Enhanced people planning capabilities
- Manage availability/utilization across companies
- Project planning integration

FP&A (next 6 months)

ERP Integration

- Update services consumed by FP&A to write back budget information from FP&A to ERP
- Update service to synchronize users/user groups in FP&A from ERP

Value Proposition

- High usability due to a seamless user experience across Unit4 solutions
- High reliability due to data consistency in the Unit4 ecosystem / across solutions

FP&A Data Integration via Enterprise Documents

- Data integration of FP&A from ERP via the People Platform and leveraging Enterprise Documents for the P&L and P&L related data
- Including master data and actuals

Value Proposition

- High data integrity by seamless, reliable and understandable transformation of data in the Unit4 ecosystem

Product Modernization (OneClient worksheets)

- Technical update and improvement of providing the worksheet functionality in the OneClient
- Increase performance of worksheets in OneClient
- Increase robustness of worksheets in OneClient

Value proposition

- Higher usability due to more stability, better performance and usability when consuming worksheet functionality in the OneClient

Solution Builder (Continuous Innovation & Enhancement)

- Extension and improvements of Solution Builder as a tool within the FP&A OneClient to easy transfer several components between various scenarios/data models
- Create files to simply transfer new models/ solutions between scenarios even on different FP&A servers

Value proposition

- Reduce project implementation time and model maintenance effort
- Foundation for efficient model management in FP&A
- new solutions can be easy transferred from non-production to production environments

IFP Model (FP&A)

- Notifications about changes in dimensions
- Workflows
- Management Consolidation
 - P/L elimination rules from consolidation model
 - no B/S CONSO
- Plausibility checks for B/S with subplans and P/L
- Optimizations based on feedback to IFP in Q3
- Performance Optimization

Value Proposition

- user friendly workflow controls for planning
- simple, easy to administrate management consolidation fully integrated in the planning solution
- improved user experience by much improved performance of the overall system and plausibility checks

PPA Model (FP&A)

- Maintenance and improvements from feedback from customer projects

Value Proposition

- improved user experience through optimized performance and functionality

Public Sector Model (FP&A)

- HR planning on job title and pay scale level of detail
- Distinction in HR planning between internally and externally funded (externally funded on grants level)
- Revenue planning on cost center and account level
- HR planning and revenues are then merged with a combined workflow
- Capital planning: cost planning on projects with a separate workflow
- Model will support bottom-up and top-down planning functionalities

Value Proposition

- improved experience for solution consultants for demos of the FP&A system for PS
- reduced implementation time due to additional predefined content

FP&A (future +6 months)

FP&A Webification

- Provide all (complete) modelling capabilities in the web based OneClient
- Full configuration of the solution via web (domain administrator)

Value Proposition

- Improved usability by using one frontend/client for solution modelling and consumption
- Less (technical) complexity by one frontend technology used

Widget-Based FP&A

- "Widgets" to enrich and cover FP&A functionality, specially fit to purpose
 - Planning Widget
 - Commentary Widget
 - Navigation Widget
 - Workflow Widget / Process Widget

Value Proposition

- Improved usability by using widgets providing the relevant functionality for specific tasks
- Better performance and usability due to less complex models by leveraging widgets with optimized functionality instead of "workarounds"

Unit4 Planning Module

- One planning solution for financial/strategic planning and planning outside of finance/operational (like sales, marketing, HR, ...)

Value proposition

- Consistent planning between financial/non-financial world
- Reduce effort to integrate and keep planning/planning results consistent
- Immediate insight on impact of operational planning to strategic planning

FP&A Smart Analytics

- Automation of repetitive analytical tasks that are time consuming but important, like identifying the reason for a budget deviation
- Solution based decision proposals based on (smart, AI) insights of the FP&A data
 - example: mitigate a reduction of revenue in a specific region by reallocating the marketing budget

Value Proposition

- Reduce time effort to get insight (understand budget deviations)
- Better decision making because of a better insight
- Save time by retrieving decision proposal provided and prepared by the solution / AI

Explorative Analytics

- Ad-hoc analytics of unstructured data (not defined in the FP&A data model in dimensions/cubes)
- Include easily data from any sources like excel and analyse / work with this data in FP&A
 - Example: copy and paste a table from Excel into a OneClient table and use all functionality to analyse and visualize the data in a dashboard

Value Proposition

- High usability by leveraging well known Unit4 FP&A functionality to get insight into data for any data

People Experience Suite (FP&A data transformation)

- FP&A often requires data input from different sources and transformation of the data
- Enhanced data transformations via the People Platform
 - Basic data integration of FP&A is handled via the People Platform and Enterprise Documents

Value Proposition

- High data integrity by seamless, reliable and understandable transformation of data in the Unit4 ecosystem

Multi language support (dashboards)

- Provide the capability to display the dashboards content in the OneClient in different languages

Value Proposition

- Improved user experience by providing the user "his" language in all areas of FP&A

Continuous Innovation (Brand/UX update)

- Seamless user experience across Unit4 solutions
- Modern and usable frontend that users do have fun using FP&A

Value Proposition

- Improved usability by seamless user experience across the Unit4 solutions
- Improved usability due to modern look and feel, as well as modern and user optimized patterns to work efficiently in FP&A

Continuous innovation ("APIfication")

- Extend API based "solution access" to trigger activities and export/import data and information
 - Examples: Execute macro via API
- Extend API based "solution access" to leverage and integrate into the Unit4 ecosystem (People Platform)

Value Proposition

- High data integrity by seamless, reliable and understandable transformation of data in the Unit4 ecosystem
- High flexibility to consume the solution and connect to any Unit4 and non-Unit4 system

Collaborative FP&A

- Enhance collaboration capabilities in FP&A
 - Microsoft Teams add-in
 - inbuild realtime chat
 - screenshot capturing
 - Ask for help (make a screenshot, send metadata to administrator)

Value Proposition

- Higher usability by efficient collaboration and fast communication between different FP&A users and administrators

FP&A Natural Language Processing (Wanda - General Availability)

- Interaction/FP&A solution consumption by Wanda (for example via Microsoft Teams)
 - Retrieve numbers from FP&A
 - Compare actuals/budget
 - show visualizations
 - trigger the report distribution

Value Proposition

- Improved usability by solution consumption via natural language (like if you are talking to a colleague)

Continuous Innovation (performance and model management)

- Collection of features to manage the modelling objects in an FP&A model
 - optimize the number of cubes, etc.
 - transparency of data flow
 - optimal modelling to apply FP&A processes in the solution
- Features to ensure efficient and fast processing of planning and analytics activities

Value Proposition

- Improved performance using optimized functionalities instead of workarounds
- Higher usability due to a good understanding and transparency of the FP&A processes and data flow in the solution by improved visualization and analysis capabilities
- Higher usability for modellers due to a lean model

Continuous Innovation (monitoring, analysis and insights)

- Extend monitoring and analyse capabilities (RAM consumption, CPU consumption, size of cubes, number of factsheets, ...) to create an optimal model providing the required functionality for the FP&A processes
 - Example: Application Insight

Value Proposition

- Improved usability due to best possible performance in lean and "optimal" models
- Save time in modelling by identifying critical processes, cubes or other modelling elements
- Higher reliability by identifying potential model mistakes early and fix them quickly, if they occur

Continuous Innovation & Customer Ideas

- Continuous innovations & customer ideas covers a constant, innovative and customer-centric optimisation of the product
- Improvements can be for core functions, UX or providing new functionality
- Input received via Community4U (product ideas) and other channels

Value Proposition

- Improved usability by providing the best possible user experience, the best possible performance and the most possible fun to work with FP&A

Smart Forecaster (General Availability)

- Leveraging artificial intelligence based on a neural network to forecast a data series under consideration of multiple influencing factors is an innovation
- The "Smart Forecaster" is planned to be available all customers in "general availability"

Value Proposition

- Save time in forecasting through automation and AI support providing a forecast
- Higher forecast accuracy by including "unlimited/all available" data and influence factors in the forecast

HCM (next 6 months)

Objective templates

We have noticed that **writing good objectives and key results can be quite a challenge and takes up a lot of time.** Consequently, many employees get stuck with objectives that are not relevant to their role or company values, too vague or are unrealistic. Some employees find creating good objectives too challenging so avoid making them in the first place. This will result in employees and teams working in nonuniformed ways without having a clear path laid out for them.

With our **New Objective Templates**, we will help everybody within the organization to create great objectives that bring value to the employee and the company. These templates will allow HR officers and admins to create predefined objectives that are well formulated and genuinely contribute to what the business needs at that time. When an employee wants to create a new objective, they will be able to choose from the already predefined objectives in the list. The objectives that match their job role will be suggested first. In this way we will prevent employees from wasting a lot of time having to write a good objective on their own. Also, the new feature will help them identify the steps they need to take in order to complete their mission. In conclusion, everybody in the organization will be able to work with clearly defined objectives that are in line with the company's values and mission.

Teams integration

In a first phase this is a Teams app that supports coaching conversation.

In a second phase this feature will leverage some of the Unit4 talent management capabilities.

Value Proposition

Allow teams to leverage some of the Unit4 Talent management capabilities in the flow of work. E.g. You can log a feedback / praise straight away in teams. This is thus passed onto Unit4 TM.

360 feedback / snapshots (premium)

360 feedback is a great HR practice for obtaining feedback about an individual from a number of sources which can include peers and from the individual themselves. Capturing feedback from all the subjects working relationships helps to give a more rounded result and may reveal aspects that typical feedback cannot.

For 360 feedback, we are extending the snapshot functionality to allow for self, peer, Coach and Team Leader assessments. Track the results in the snapshots tab or insights so you can truly get a complete picture of an employee's performance.

Benchmark reporting – Engagement

Compare your engagement scores to our U4TM benchmark and see how well you fare compared to all other companies using our engagement tool. This will give you an idea of where you stand and gives you a goal to work towards.

Recoloring

Aligning the intuo brand with the Unit4 brand

Value prop:

By aligning the brand and transforming the name from intuo to Unit4 Talent Management we create a unified experience across all the products in the PES

New landing page

We don't want people to spend time searching for information, we want the right information to come to them. That's why we're introducing this new landing page. All relevant info and actions about one's team or oneself are grouped here, so this is really a person's action center to manage their teams and their personal development.

Email notifications improvements

Over time we have created a lot of notifications. These need to have review, bundle and cleanup bot from a content, UI and timing perspective.

Value prop

A better experience where you get the right information or nudge at the right time.

Slack Improvements

The intuo slack both was created a few years ago but hasn't received an update to support the workflows of bigger organisations and alignment with the U4 branding.

Value prop

- A updated talent management bot straight in your communication tools

New insights home

Most talent software offers reporting and dashboarding for HR, but none of them provide the same access for managers to analyze their teams. Secondly we provide clever presets so both a manager and an HR professional can quickly find relevant talent insights.

Insights – Adoption

U4 TM's new adoption insights report allows HR to track adoption and change. Using the report HR cannot just track how people are using the tool, but they can see if their efforts are effectively leading to the desired culture: “do people do conversations, give feedback or set objectives outside of the mandatory amount.”.

Learn waiting list

If your users want to enroll for a course but they were too late and all the slots are filled, they can now put themselves on the waiting list and let the instructor know that they want to attend this! The learn waiting list will allow users to sign up for courses that are full. This will create a waiting list that automatically updates and gives control to the instructor to edit the rosters and availability. This will give instructors more control over the courses and a good indicator of popularity of certain courses.

Engagement Feedback processing

Managers often find that engagement pulse comments are a great way to get a real sense of how their team is doing and can inspire really impactful actions. Responding to these comments can also remind their team that they do care and they are listening.

We've made it easier to process these comments so that it is easy to see which comments need further action. This can really help managers stay on top of all the comments, especially for larger teams.

All new comments and replies will appear in your Unprocessed list. These comments can now be “Marked as processed” clearing them from your Unprocessed list making it easier to stay on top of what is important.

Phased roll-out

It will be possible from now on to allow specific users to specific parts of the platform.

Rating skills in snapshots

Buying U4 TM is a journey towards futuristic talent management. We want to support you in every step of that journey, so we built a way of assessing people’s skills (related to their job title) so you can continue working as you were and move into the next gen talent management step by step.

Global Payroll (Immedis Partnership)

This feature delivers multi-country payroll to UNIT4 customers via integration with Immedis. Immedis is a mid-layer/interface between HR software and BPO services. Payroll is delivered as a service by payroll providers.

Value proposition

- Payroll offer for multi-country companies that operates at least in 4 countries.
- Centralized reporting and data analytics across all companies with different currencies.
- No need of running payroll by customer (outsourcing)
- Integrated with U4ERP HR module

NA Payroll Year-End 2021

Payroll year-end requirements for the 2021 year to be announced by the NA authorities

(NAP14) - US Tax Engine

(NAP20) - Canadian Tax Engine

The US - Tax reporting (ACA, 941, W2, 1099R)

Canadian Tax reporting (Releve 1, T4, T4A)

Value proposition

- Making sure our NA operating customers stay compliant.

Reimbursement performance improvements

Based on ongoing analysis/simulation on volume database (with statistical info from the very large customer), we need to make sure performance is acceptable on server processes, windows, and workspace items.

Value proposition

- Server processes to finish with hours
- Windows to be responsive when opening, navigating between fields, and upon save.
- Preconfigured portfolios to load in seconds
- Preconfigured workspaces to be responsive

SmartRecruiters integration (EAP)

- Out-of-the-box integration with SmartRecruiters
- The ERP - SmartRecruiters integration provides a seamless flow of applicants through the recruitment and hiring process

Value proposition

- Provide recruitment capabilities as part of the HCM offering
- Data consistency between ERP and SmartRecruiters
- Applicant tracking
- Capture new hires in ERP

ERP US/Canada Payroll localization availability

Securing legal & statutory requirements for our US/Canada operating business (key verticals) in the area of Payroll, which is mandated by US/Canada local and central regulatory bodies.

Value proposition

- Making sure that US/Canada operating customers stay compliant w/r legal & statutory requirements.

Payroll Dashboard - Information Browsers available as data input

Currently, Payroll Dashboard elements based on data provided from Browsers and tables. This feature brings the possibility to use Information Browsers as data input

Value proposition

- Better WEB experience
- Payroll Dashboard element like charts, KPI can use data provided by Information Browsers

Intercompany Resources

- People working across different legal entities within their own company
- Create Intercompany Resources (IC Resources) automatically in the different legal entities
- The master company owns the resource master data and the IC company hosts the IC resource data

Value Proposition

- Dismiss manual entry of intercompany resource records
- Distribute workflow tasks to IC resources (i.e. timesheet approval)
- Differentiation in IC resource cost rates
- Specification of the resource on the invoice to the end customer

Smart Recruiters Integration: Internal recruitment

The existing functionality of SR integration does not offer a proper way of handling internal candidates. The feature is about:

- recognizing internal candidates based on internal user or NI number
- for internal candidate no new employee record is created, the existing employee gets a new position instead
- the old position remains as it was and has to be adjusted manually by the HR department in the onboarding process

Value Proposition

- Internal and external recruitment is supported in the integration
- An internal candidate is automatically detected which results in creating additional employment instead of a new employee record

HCM (future +6 months)

Succession Planning

Implement the functionality to

- Appoint one or multiple successors
- Suggest one or multiple successors based on the available data

Value proposition

As a company I have an up to date view on succession planning in my organisation.

The process is supported by providing succession suggestions based on data collected performing the job.

New Conversation flow

U4 TM aspires to be a true useful toolbox for managers. A tool to organize one-on-one's and performance reviews has to be a part of that. That's why we're releasing this feature.

Because organizing one-on-one's will become a lot more efficient and structured, managers will not only save time but also simply have better one-on-ones.

Notes overhaul

Managers use all sorts of places to log notes about their team, and similarly employees use a lot of different tools (like onenote) to gather information for their personal development. Intuo centralizes both in a new note-making functionality so they have all personal development related notes in one place, be it for themselves or for their teams. Notes can be made through the mobile app, through Microsoft teams or in the intuo web app.

Profile redesign (+ export profile)

With the redesign of the profile U4 TM will turn it into

- 1) A place where employees can see their skills, growth goals, past achievements and career aspirations.
- 2) An employee's colleague can see the employee's skills and career aspirations.
- 3) HR can see a detailed overview of the employee's activity, assessments and skills.

Growth plans

With this new feature we want to make the way an employee can reach their career aspirations explicit. More than just a learning plan a growth plan is a combination of suggested courses, coaching interactions, objectives and notes that suggest a path towards the next step in your career. The aim is not to bother employees with extra administration, rather these paths will be presented to them using automation, templates or suggestions from a manager or coach.

Smart Recruiters Integration Support for multi-companies

Currently, basic integration with SR does not support companies running in several countries that are registered via different clients in U4ERP. The feature is to support the situation where:

- There is more than one client in use
- The company/client/location is included in the hiring process and the new employee is created in a proper client in U4ERP
- Legal entities registered in the same client are also included
- An employee with default data is indicated by the U4ERP system parameter and exists in each client

Value proposition

- The automated process of hiring new employees for companies that have more than one legal entity
- Indicate to which legal entity the job offer belongs to
- Possibility to differ default employee in each different client

Payroll Configuration Manager API Set 1

Provide Payroll APIs to be consumed by the configuration manager. Configuration manager ships configuration between different ERP environments.

Payroll configuration manager APIs to be delivered

- Value References CRUD API
- Value Reference Rates CRUD API
- P&D Register CRUD API

Value Proposition

- decreased the amount of time needed in project implementations
- better user experience through standardized configuration from model industries
- better integration possibilities with other systems available on customer's site

Tooling - Configuration Manager HR APIs - set 1

- Provide Human Resources APIs to be consumed by configuration manager enabling an easy and fast deployment of Human Resources setup
- HR configuration manager APIs to be delivered
 - Position register
 - Position codes
 - Work schedules
 - Day type master file

Value Proposition

- Decrease the amount of time needed in project implementations
- Ensure Human Resources solution setup consistency

Tooling - Configuration Manager HR APIs - set 2

- Provide Human Resources APIs to be consumed by configuration manager enabling an easy and fast deployment of Human Resources setup
- HR configuration manager APIs to be delivered
 - Absence codes
 - Absence groups
 - Competence types
 - Holidays

Value Proposition

- Decrease the amount of time needed in project implementations
- Ensure Human Resources solution's setup consistency

Payroll - Functional API Set 1

Provide Payroll APIs to be consumed by customers and to provide better integration with the Payroll module.

Payroll APIs to be delivered

- Variable payments CRUD API

Value Proposition

- possibility to transfer variable payments into payroll from other systems

HR related public APIs

- Human Resources APIs to expose ERP business data and logic to other products

Value Proposition

- Boost partner ecosystem
- Provides a consistent business logic for human resources transactions processing between ERP and other sources

Industry Models (next 6 months)

Talent Management integration

Talent management (Intuo) integration contains the bidirectional syncing of data between Intuo and ERP to be included into the Industry Models as out of the box integration. This includes syncing of org-structures from ERP to Intuo and skills and competences between the two solutions (currently the specification is a work in progress. Is also comprises of creating embedded links in ERP to Talent (Intuo).

Value proposition

Customers get the Unit4 Talent integration out of the box and aligned to the Industry Models. This will allow a reduction of effort in implementations and quicker time to value.

Multilingual support

Provide multi-lingual translations for all common data elements (e.g. dimensions, accounts, dimensional values, workspaces, flexible fields) used within the models for all common languages in ERP. This next to the already available multi-lingual menu items in ERP. Targeted languages: English US, French, German, Dutch, Norwegian, Swedish, Spanish, Canadian French.

Value proposition

Providing multi-lingual support will drive adoption of the models in the different regions and reduces the effort during implementation to translate titles for the setup in the models. It removes the effort of having to translate over and over again in every implementation project. It boosts people experience when the user can work in ERP in its own preferred language.

Wanda support

Wanda digital assistant use cases configured and aligned to the Industry Models when applicable.

Value proposition

Implementing Wanda helps reducing the implementation effort and ensure an aligned setup with the Industry Models. It extends the people experience for users that like a conversational way of interacting with UNit4 ERP.

Extension Kit flows

Equip the Industry Models with several out of the box extension kit flows and align them to the models data model. Use cases under consideration here are:

- Update absence request in Outlook calendar
- Government watch list checking of suppliers, customers, resources and volunteers
- Dun&Bradstreet credit checking and updating of customer/supplier records
- Automatic document signature using e-signature provider and storage in ERP document archive
- Automatic document attachment on Intercompany transactions

Value proposition

Leveraging new capabilities in the People platform and delivering them out of the box in the Industry Models is the main objective here.

PS model ERP migration

Migrating the current PS model version to ERP and amending configuration that is replaced or descoped. Working assumption is that Model database can be restored in a ERP environment and that 80% of the configuration still works.

Value proposition

Allowing clients to have a quick time to value on ERP implementations since that is even more evident on a true SAAS platform.

Industry Models (future +6 months)

Enhanced reporting & layouts

Currently the Industry Models contain a predefined set of standard enquiries, statutory reports and layouts. There is some improvements required especially around the multi-lingual and multi-country usage of these reports. Additional requirements for reports have been scoped and will be added to the models.

Value proposition

Providing out of the box statutory reports and layouts (e.g. purchase order print, project invoice) will reduce the effort of implementation. and deliver an out of the box capability.

HCM automated forms

Enhance HCM capabilities by automating the HR forms to update master data records (Personnel, Employment, Position details, Leaver details in the back end)

Value proposition

HR departments expect HR forms to be entered by employees and managers as a Self Service capability. The form content should be automatically updated after approval in the respective master data records (i.e. personnel, position, employment details). The enhanced capability reduces the manual intervention required from the HR department to update records.

Income Management

Public Sector organizations have numerous income streams that aren't related directly to sales or project invoicing. They require a simple payment system to manage web payments, automated telephone payments, 'in person' payments' and agent assisted telephone payments. These payments should then be integrated to Unit4 ERP using a common data model, to provide a real-time and effective overview of the cash position.

Value proposition

- Enabling Public Sector organizations to take a full range of payments for services provided across locations and online.
- Reducing the overhead relating to ensuring in-house compliance relating to payment solution requirement.
- Full integration and automation throughout the payment and reconciliation process to reduce administrative burden.

Workforce Scheduling / Rostering

Public Sector organizations have diverse workforces, with complex rostering requirements. An integration from Unit4 ERP to a best-of-breed solution will enable organizations to deal with complex rostering challenges and ensure the right people, with the appropriate skills are assigned to the required locations and shifts.

Value proposition

Enabling Public Sector organizations, particularly in the sub-verticals of Emergency Services and Health, with the tooling required to effectively manage their workforce.

Property Tax & Utility Billing

Public Sector organizations in North America have a mandatory requirement to collect taxes and utility bills reliably and quickly using cloud-based software with seamless integration to their ERP application.

They also need to deliver an automated service to manage every aspect of the customer lifecycle - from new connections to billing to customer service calls.

Value proposition

- Modernizing the engagement between Public Sector organizations and their customer base, to provide automation, enhanced customer engagement and ultimately to improve revenue collection.
- Full integration and automation throughout the customer management and billing process to reduce administrative burden.

Contract Sourcing

Public Sector organizations operate under strict requirements to ensure that any contract sourcing opportunities follow a fair and transparent process.

In order to facilitate this process effectively ERP integration to best of breed software is required. This software should enable the organization to:

- Find the best products and services (on the most favorable terms and conditions)
- Evaluation responses efficiently and online, with end-to-end tracking capability
- Work within their own rules and governance procedures

Value proposition

- Streamlining and enhancing the strategic sourcing process to achieve financial benefit and operational efficiencies
- Providing Suppliers with a structured and transparent process through to the contract award