



# Transform paper-based forms into enterprise-wide digital forms

Most organizations recognize and already pursue the benefits of eliminating paper-based processes – and their resulting disparate and manual document flows through the business. Enterprise-wide, online forms will help you take your efforts to the next level, offering not just an alternative but an opportunity to review and transform processes, to deliver major improvements.

Regardless of whether manual forms are specific to one department, or one geography, there are significant productivity and efficiency gains to be achieved by converting paper-based forms into enterprise-wide electronic forms with some level of automation.

## Enterprise Forms Automation

Any collection of data fields in the system can be defined as a “Unit4 Form” and then made available throughout the organization. Smart automation assists users, enabling them to create forms pre-populated with data that the system already “knows” – avoiding data re-keying and the risks of manual data-entry errors.

Forms can be dynamic – the layout will change according to the data entered by the user – providing easier-to-use and more efficient forms processing. For extra flexibility and efficiency, after form approval, the system can be automatically updated with approved form data, instead of re-keying it.

## Improve the efficiency and transparency of your processes with the integrated electronic forms creation tool.

The chances are that you've already moved many of your day-to-day processes from manual to electronic. But, in the past, there have probably still been a few areas where that has been harder to achieve. In the Finance department, you may still have manual steps in the credit note or budget request process; in HR, the onboarding or exit forms may still leave a paper trail; and in the Project Management Office, project close-out may still require extra manual work. With Unit4, all this manual paperwork can now be transitioned to automated, digital forms.

### Streamline form design

An administrator can create new form types on the fly (easily adding sections and fields to the form), control the design/format, and make the form available to a targeted user group.

### Automate form completion

Manually keying data into forms can be time consuming, error prone and – when you know the data is already somewhere else in the system – extremely frustrating. There's really no need!

Now you can harness the power of the single, shared database that underpins Unit4's integrated ERP solution to intelligently find "known" data, prepopulate form fields and speed users through form completion.

### Reduce the complexity of forms

You need users to focus on providing the right answers to the right questions. But that won't happen if you present them with a baffling array of both relevant and irrelevant form fields. It's time for a smarter, more dynamic approach to form layout and assisted completion.

The smarter form setup lets you create rules to reduce form clutter. It matches the displayed form fields, sections, and window tabs to the user – making the forms extremely responsive by dynamically adjusting (or even hiding) fields and options, during form completion, according to the data being entered in specific places.

### Automate a workflow process for a form

As you would expect, submitted forms are easily handled by the built-in Workflow functionality, ensuring that the form is sent to the correct manager(s) when submitted, and locked for further changes. If required, the form can be returned to the user for error corrections, for example after a "reject" decision from a manager.

But what happens once the form's approved and the actions are completed? More manual re-keying to update the system? No! The loop is now closed on form data handling, to cut out extra manual work (and the accompanying risk of errors) by automatically feeding changes to business data back into the system and keeping it in sync.

### Examples of electronic forms:

- On-boarding process
- Leavers (exit form)
- Request to hire
- OSHA form
- Risk assessment
- Project closure
- Budget request
- Request credit note
- Sales form
- Personnel changes
- Contractual changes
- Many, many more...!

## Want to know more?

To see Unit4 Business World On! in action and learn about the solution, please visit:

[unit4.com/erp-latest](https://unit4.com/erp-latest)

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