

10 Important Questions to Ask When Evaluating Time Tracking Solutions for Dynamics™ GP

White Paper

In January, 2016, Journyx partnered with MSDynamicsWorld.com to conduct a survey of Microsoft® Dynamics™ GP users to find out more about their usages and challenges related to time tracking, both in general and within GP (download the full report, [The State of Time and Expense Tracking in Microsoft® Dynamics™ GP](#)). As the survey data showed, respondents expressed a wide variety of problems and issues when it came to time and expense tracking within their organizations. The top challenges included:

- Getting timesheets submitted on time
- Correcting bad or missing data
- Manually entering timesheet data into GP or other systems

Many Dynamics™ GP users also find that time tracking within GP has limited capabilities when it comes to approval workflows, data validation, and reporting. Still others are using separate systems for timesheets that don't integrate with GP – causing duplication of data entry that is inefficient and prone to mistakes.

If you've outgrown your current time tracking system, or if you have multiple installed time collection systems that produce inconsistent data, it gets hard to understand project costs, to figure out what people are working on, and to send correct and timely bills out to your customers. It also can make payroll very frustrating.

How can you be sure you'll get a system that works for your company and solves these challenges?

Here are ten questions (and several related questions) to consider and ask each vendor you evaluate:

What will I be able to do in a third-party time tracking solution versus GP by itself?

Dynamics™ GP users previously had time entry capabilities in Business Portal, an add-on linked to Financials, Sales, Purchasing, Inventory, Project Accounting and Manufacturing. Business Portal was discontinued as of the 2015 release, in favor of Employee Self Service available directly in GP; however, the functionality is limited when it comes to performing more complex processes.

What to Ask the Vendor

Depending on your specific needs, these are some of the features that you will want to cover with your time tracking vendor:

- **Multi-level approvals:** Many companies have a need for a more complex structure for approving timesheets and expenses. GP currently offers only 1 level of approval, and there is not any flexibility for developing custom approval workflows. If you have the need for multiple levels or custom workflows, make sure you ask the vendor how they handle it.
- **Mobile time and expense entry and approvals:** The ability to track time and expenses via mobile device is becoming more of a necessity, so ask the vendor if they have a mobile app and what kind of functionality is available within it. Does it only handle time entry, or can expenses be tracked? Does it handle all types of time entry and leave time? How easy is it to use? Can managers approve timesheets through the app?
- **Data validation:** By creating rules within your system for validating the data your employees input, you'll be able to prevent user entry error (which can save you a lot of time and money). Ask the time tracking vendor if they have data validation functionality that automatically catches errors before the timesheet is submitted.

- **Email reminders:** The top challenge GP users have when it comes to time tracking in their organizations is getting timesheets submitted on time. This challenge can be overcome if employees are automatically reminded to submit their timesheets at the end of a period.
- **Crew-based time entry:** If your organization has various work crews who don't have direct access to enter their time, your time tracking solution will need to make it easy for managers to track time at a crew level.

Do you support Canadian payroll?

If you need to run payroll for Canadian employees, you will most likely be using a 3rd party payroll provider outside of Dynamics™ GP. As a result, you will want to ask your time tracking vendor about how they handle transferring time data to your payroll provider.

What to Ask the Vendor

- **Automatic processing for payroll rules:** Will the time tracking system do overtime and other payroll-related calculations automatically, or will your users and managers be required to know the rules and enter time accordingly? The easier you make entry and review for your end users and managers/approvers, the more likely you are to get accurate and timely data.
- **Various output format options:** Each payroll provider requires a slightly different format for importing time data. Does the time tracking system include flexible formatting to interface with a variety of different payroll systems?
- **Recurring schedules for the data transfer:** Does the time tracking system include a way to schedule data transfer to your payroll provider?

What types of approvals does your software support?

Your company may require certain types of approvals based on what data an approver is allowed to verify. Two of the main types of data are timesheet ("sheet")-based and project-based. For sheet-based approvals, a supervisor may approve all time for a set list of employees for a specific period. For project-based approvals, a project manager may sign off on time from a variety of employees, provided the time was logged to a project s/he manages.

A vendor that can handle both types will allow you much more approval and reporting flexibility based on your company's specific business processes.

What to Ask the Vendor

- Can you handle both sheet-based and project-based approvals?

Will I receive responsive support from my vendor?

Most vendors provide a static, outdated FAQ list and support staff that are often part of the sales team. When support is part of the sales force you only get help as a prospect. Once they've got your money, getting help...well, it's 'iffy' at best.

What to Ask the Vendor

- Is your support staff part of the sales team?
- What is your standard response time for an average support case?
- Can I talk to three recent customers that are happy with your support?
- What did your most recent support poll turn up as the overall satisfaction level for your supported customers?
- Do you even do such polling?
- What percentage of your customers renew their maintenance contracts each year?

Will you help me meet compliance requirements?

Keeping accurate time and cost accounting data is very important for companies in need of audit compliance, such as for the Defense Contract Audit Agency (DCAA), Health Insurance Portability and Accountability Act (HIPAA) or Sarbanes-Oxley (SOX). Look for a solution with features that will help you comply with the specific requirements of the regulations.

What to Ask the Vendor

- Is your system flexible enough to track custom data to fit our auditing needs?
- Does your solution maintain an audit trail that includes change history (e.g., who, when, why)?
- Does your system include tools that auditors can use to verify my compliance?

How secure is your solution?

In a world where hacking, ransomware, and other cybersecurity breaches are constantly looming threats to your company's employees and infrastructure, data security should be of the utmost importance. There are several questions you need to ask any potential time and expense tracking vendor to ensure they take your company's data security seriously.

What to Ask the Vendor

- Are you SOC compliant? What about your data centers?
- Where are your data centers located and how reliable are they?
- Who manages our data?
- Who has access to our data?
- How secure is your physical premises?

Is the solution web-based or web-enabled?

Many timesheet systems that claim to be web-based are in fact only web-enabled. The fact is that your company's chosen operating systems and chosen browsers will change over time, and if a vendor doesn't support all systems and browsers today, then it might not support whatever you choose in the future. Web-based software works on all browsers on all operating systems, and every aspect of the software can be administered via the web. This enables real-time accurate data collection and management worldwide without the difficulties of maintaining special software on client machines. Web-enabled means that only some aspects of the software work via a browser, or that it doesn't work well with certain browsers or operating systems.

What to Ask the Vendor

- Which web browsers do you support?
- Which operating systems do you support?
- Can you change the approval workflow in this application via the web browser?
- Add users?
- Is all reporting web-based?
- Is there anything at all about this application that doesn't work on all browsers?

Can I gain efficiencies from a SaaS solution?

Most timesheet software companies either sell software or a SaaS service, not both. SaaS means software-as-a-service. You might also have heard it referred to as "the cloud." Essentially, it means you rent access to 100% web-based software that's running on external servers instead of installing it on a server at your office or data center. Choosing the SaaS option provides faster rollouts, automatic server protection and maintenance and easier upgrades.

What to Ask the Vendor

- What sort of backup generator do you have in case of a power outage at your SaaS site, and where is it hosted?
- How much does server protection cost?
- Can I rollout on your SaaS servers and later transfer the data to my own servers?
- Where are SaaS backup tapes stored?

Is this solution flexible for all my employees?

Most timesheet programs offer a single environment for time tracking that includes a few minor options for customizing an employee's timesheet layout and process. Limited ability to customize an employee's timesheet is a problem for two reasons:

1. Acceptance and daily usage of your timesheet system is required in order to realize the full benefits of automation. Employees are more likely to feel comfortable with the transition to a new system if the tracking environment and process resemble the process they followed previously. The ability to customize employee timesheets to emulate previous processes facilitates compliance and overall success.
2. Not all types of employees track their time the same way. Exempt employees, hourly part-timers and contractors may all require different methods of tracking time. The ability to use different timesheets for different types of employees is necessary in order to support each employee's time tracking process.

What to Ask the Vendor

- What parts of the timesheet can I customize, and what are the options?
- How many different timesheets can I create for my different types of employees?
- If I provide you with a copy of my employee timesheets that are currently in use, can you configure something similar using the standard options available in your software?
- How do I assign one style of timesheet to one group of employees, a second type to another group, and so on?
- How do I set up timesheets that allow some of my employees to track the billing status of their time while preventing others, who do not track this information, from seeing it?



Is my vendor preparing us for the future?

Rolling out a new time tracking solution can be a real challenge if you have multiple departments with complex needs. A vendor that offers flexible and high-quality training services can be a lifesaver.

What to Ask the Vendor

- Were they effective?
- How did you measure customer satisfaction?
- How experienced is your training team?

About Journyx, Inc.

Journyx is not your average software company. We strive to be relentlessly creative and to build tools that help you spend your time on things that matter. After all, time is all we have. Founded in 1996, Journyx offers customers two solutions to reach the highest levels of profitability: Journyx – project, time and expense tracking software – and Journyx PX – resource management software that provides work and financial forecasting for a complete picture of project and budget status, employee time and availability. Journyx has thousands of customers worldwide, including Crate&Barrel, Schlumberger, BP, Big Brothers Big Sisters, Callaway Golf, Honeywell and many others. For more information, visit www.Journyx.com.