

Timesheet Best Practices for Microsoft Dynamics

White Paper

Executive Summary

Microsoft Dynamics offers basic timekeeping functionality, but for complex tasks an integrated third-party solution is optimal. When selecting such a solution, it is valuable to analyze it in the context of your business's specific needs with regards to efficiency, compliance, and necessary approval levels. Quality time tracking solutions will be able to provide capabilities for all of these and more. Because Microsoft Dynamics can integrate with software it is unnecessary and unproductive to purchase expensive standalone systems that do not work with Microsoft Dynamics.

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The Flexibility of Microsoft Dynamics

Microsoft Dynamics offers many advantages. One key benefit is the ability to integrate with software that will enhance flexibility while retaining the functionality that users have come to expect and enjoy. One concern that faces many Dynamics users is the utility of the included timekeeping system. While it is sufficient for many basic business tasks, it begins to falter with more complex projects that tend to emerge as businesses grow and mature. For that reason, it is important that business owners choose a timekeeping integration with expanded utilities that can grow with and enhance an organization. The following are some considerations that might prove applicable and helpful when determining a timesheet solution.

Improve Efficiency

Timesheets can offer advanced functionality beyond the context of payroll and accounting. Timesheets, when properly configured, can be used to ensure efficiency within an organization by tracking employee time at the individual level as well as by department or organization. The benefits are well worth the effort. By analyzing this information, it is possible to determine discrepancies in job role versus skill set. For instance, if one employee is assigned tasks in one area, but actually completes tasks in another with much more efficiency, it makes sense to assign him more of the tasks where he's most efficient. Organizational restructuring of this sort sounds complex, but it is possible to perform these minor corrections regularly if the information is accessible and apparent. In fact, experiments like this are necessary for optimal growth of an organization, though they are often overlooked.

Manage Strategic Approvals

Approvals are often limited to just one supervisor or administrator. Unfortunately, this limitation makes it difficult to capitalize on some of the more complex benefits that timekeeping can offer a company. At an even more basic level, though, it means that sometimes the right people will not see the information they need, or will be overwhelmed by unnecessary data that makes interpretation complex.

For instance, in an organization an employee might fall under the management of one executive. However, for a particular project a specific project manager will direct him. In order to determine the employee's efficiency on that project, the project manager will want to see the amount of time he is dedicating to tasks specific to that project. However, if he only has the option to see the employee's time tracked to all projects and tasks, not simply his project, the project manager will have a much more difficult time wading through and categorizing unnecessary data. For this reason a third party time tracking system with customizable approvals is recommended if a business



will be engaging in any sort of complex activities so that the right people will have access to the right information every time.

Automate Compliance

Formal policies and compliance requirements can govern employee timesheet usage, but it is inevitable that mistakes will occur. Often, this will take the form of simple human forgetfulness, because after all employees have many things they must work on without worrying about time tracking. In the basic timekeeping software included in Microsoft Dynamics, there is very little a business can do to make sure compliance is taken care of. Fortunately, third-party solutions can provide an answer in the form of automation.

With these programs, reminders and validations should be configured according to the specific needs of the company implementing the system. If, for instance, it is necessary to enter time daily, then an automated system will send a brief email reminding an employee to enter time each day. If that employee still forgets, the system will also notify him and point him to the timesheet that needs corrections. Similarly, if an employee is required to enter a certain amount of time, or should only track time to certain tasks, the system should be configured to make errors impossible. By limiting time entry options at the employee level, and automatically rejecting invalid timesheets, businesses can save quite a bit of time since errors will be drastically diminished, if not eliminated entirely.

Closing Thoughts

Because Microsoft Dynamics can be configured to integrate with advanced time-tracking tools, it is unnecessary to roll out an entirely separate software system. In fact, it is counterproductive to do so. When choosing a timesheet solution to integrate with Microsoft Dynamics, it is important to identify the core requirement that the new software should address, and shop accordingly. Every good timesheet software provider will be happy to discuss their product and how it relates to specific needs, often accompanied by a live demonstration. By taking advantage of key integrations, it is possible to extend the value of Microsoft Dynamics beyond its already impressive basic form.

About Journyx

Journyx enterprise time and expense tracking software integrates with Microsoft Dynamics GP, AX, NAV and SL. Journyx for Microsoft Dynamics allows companies to quickly implement a complete time and expense tracking solution using existing business data. Journyx features flexible accrual calculations, multi-level approvals, mobile entry, integration with Microsoft Project, data validation, and local install or cloud. Since 1996, Journyx has provided web-based time and expense tracking solutions. For more information, visit www.journyx.com.