



# Time & Expense Reporting Software: Evaluating Your Options

DATABASICS WHITEPAPER

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## GOOD NEWS, BAD NEWS

Evaluating options for any kind of software is a real headache. Not so long ago, Big Brother IT took care of all of our technology needs. Now, business unit and functional leaders have been “liberated” from IT, with the mandate, budget and authority to evaluate, implement and operate their very own applications. Of course, this is a generalization; most companies have mixed models around how they buy technology, and it’s a wide spectrum.

However, regardless of where your company sits on the spectrum, if you’re a business unit or functional leader, you *should* take an active role in deciding which applications will be rolled out to your teams, because the stakes are high. And in reality, most organizations require your participation in these decisions.

So what’s the good news and bad news? The good news is that you have the ability to specify those applications that will advance your agenda, streamline your operation, and provide you with data-driven insight. The bad news is that you are now expected to evaluate products and services offered by providers who, in most cases, do not speak your language, nor do they care to learn.

## THE YIN AND YANG OF IT

Technology providers are enamored of the stuff they produce, and they think everyone should feel the same way. On the other hand, as a business unit/functional leader, you have, well... *a business* to run. If some type of technology can help, fine, but explain it to me in business terms. A lot of tech companies pay lip service to understanding your business, but most of them don’t.

Evaluating your applications options, then, requires you to be able to manage this fundamental dichotomy to your advantage. You’re going to have to live with whatever it is you’re buying. We’ll discuss how to do this shortly.

Most technology providers don’t mean to be obtuse, and they’re trying to improve. They really are sincere about helping you. The tech industry spends millions, if not billions, trying to learn how to understand you. Just take a look at any major business publication, and you’ll see that most ads are for tech companies trying to speak “business.” And tech salespeople are being retrained in order to do a better job working with you. But you have to help them to help you.



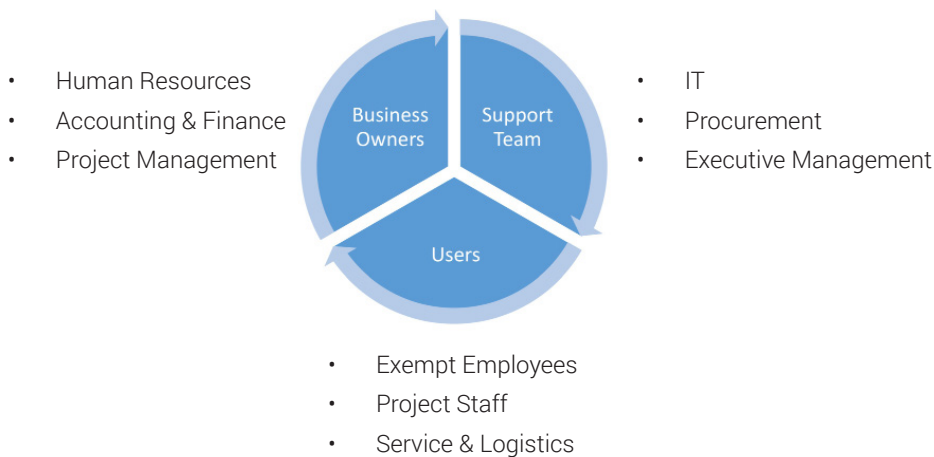
## TIME & EXPENSE REPORTING SOFTWARE

While the advice in this white paper can be generalized, our focus is on software applications that can automate time and expense tracking, including the following:

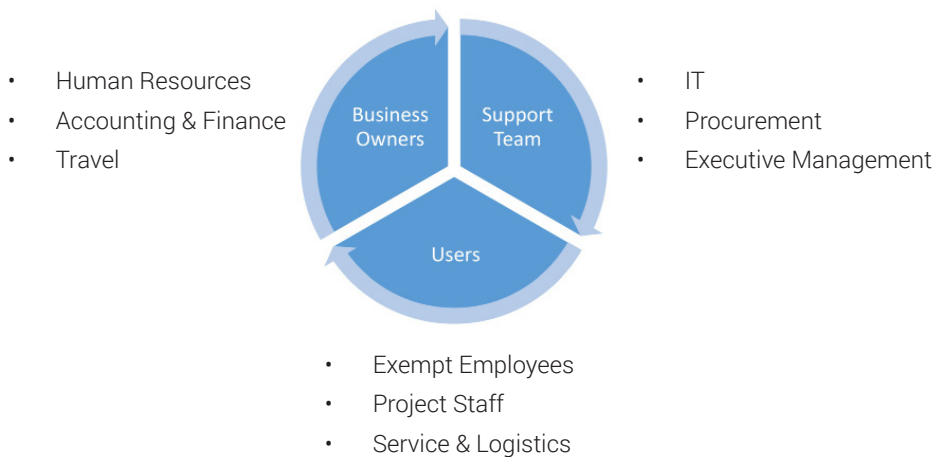
TIME	EXPENSE
<ul style="list-style-type: none"> <li>• Timesheets</li> <li>• Leave management</li> <li>• Overtime management</li> <li>• Staff allocations</li> <li>• Attendance</li> <li>• Compliance reporting</li> </ul>	<ul style="list-style-type: none"> <li>• Expense data entry</li> <li>• Reimbursement</li> <li>• Policy enforcement</li> <li>• Project tracking</li> <li>• Reporting and analytics</li> <li>• VAT recovery</li> </ul>

As in most application deployments, there are three stakeholder groups: business owners, support organizations, and users.

### For Time applications, these groups include:



### For Expense applications, these groups include:



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*Note the overlap.* That's why these applications, taken together, are often referred to as an *Employee Reporting Platform*.

## WHO “OWNS” IT?

Despite all of these stakeholders, someone has to “own” an application. This only makes sense given the complexity of the whole process: defining need, evaluating options, implementation, training, etc. The most common owners for Time applications are HR and Project Managers; for Expense applications, Accounting & Finance and HR.

But there are as many exceptions to this as there are companies. Within each enterprise, factors such as culture, organization and job descriptions impact the “ownership” question. In some cases, there is dual ownership. In others, the supporting teams are the owners. Depending upon the business and business model, owners may include travel (mentioned above) or sales.

Key point: avoid turf wars. But don't shy away from claiming ownership if the benefits of the application primarily accrue to your domain. In fact, the most successful implementations start out as the gem of an idea in someone's brain. How did it get there? Maybe from a staff retreat, or maybe an inspiration. It doesn't matter.

## THE ROADMAP

Let's assume that this nascent initiative is a result of an idea. Your idea, to be precise. Where do you start, and what does the map look like?

### There are seven basic steps:

1. You have an idea that automating your timesheets, or your expense reporting, or both, will result in significant gains. First of all, answer this question: “What can be done to really make an impact?” This may include, for example, adding to the bottom line by recovering VAT; or, reducing risk by ensuring compliance. Where are you now, and where do you want to go?
2. Make the business case. You'll have to sell the idea internally. We suggest that our customers treat the business case as if they were a start-up business looking for venture capital. Be very clear about the return.
3. Define the process! *This is critical.* The top reason that new applications fail is the failure to map out a process that the application can improve or enable. By process, we mean one of the biggest mistakes is to identify a problem or opportunity that can be addressed by technology, and then jump to the technology solution. This often leads to failure, with the blame going to the technology.

Let's be clear about this – technology is the means of automating and improving a *process*. If we don't define the process first, and in great detail, how can we really use technology?

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**Using the timesheet example, a process would be:**

- **WHEN** you want timesheets filled out and submitted?
  - **WHO** reviews timesheets?
  - **WHAT** data do you want to collect over time?
  - **HOW** will you use that data?
  - **WHAT** other systems will this solution interact with?
4. Create an internal team to include other stakeholder groups who have an interest in the outcome, and/or who can share resources. This also is an opportunity, if appropriate, to broaden the utility – and benefits – of the initiative. Broader impact leads to greater influence.
  5. Functional requirements. Requirements translate process into software. This is where you build the blueprint. If you want your application to have a mobile interface that mirrors the desktop experience, specify it. Be very precise about what you want and need. This is will be your starting point for discussions with suppliers.
  6. Speaking of suppliers – research potential vendors. The more you know before the first meeting, the better. Thanks to the internet, there is a ton of valuable information available for you to evaluate potential vendors before you even contact them. In fact, the Aberdeen Group, an advisory firm that helps tech vendors get their messages out, calls this the “Hidden Sales Cycle.” Smart buyers can save a lot of time by discovering and focusing only on those vendors who meet their needs.
  7. Implement and train. The vendor usually handles the technical side of implementation. You need to handle the “soft” side, by building excitement and gaining buy-in, especially with users. Some vendors also provide initial training, but retention is unlikely without continual reinforcement. That means in-house.

**THE REALITY OF TIME AND EXPENSE SOFTWARE – STAKEHOLDER NEEDS**

We know time and expense, and we’ve been through a lot of implementations.

For a successful implementation, these are the critical elements, by role, that should be addressed.

**HR Leaders** are tasked with three important functions: facilitating the recruiting and developing of people, the company’s most important asset; ensuring that the basic needs of employees are met; and protecting the enterprise through several levels of compliance. They also are concerned with employee satisfaction and retention. Given such a broad mandate, HR leaders will want to leverage any software in order to meet as many of these needs as possible.

**Time and Expense Report Filers and/or Approvers** care about convenience, ease-of-use, and, to some extent in almost every organization, preservation of the leeway to “bend the rules”. They want to spend as little time and effort on expense reporting or timesheets as possible. Expect them to push hard for mobile solutions.

**Procurement** is unimpressed by bells and whistles. It wants to match up capabilities against explicit requirements. Above all, Procurement wants to avoid cost over-runs and the perception of vendor performance failure.

**Finance & Accounting** want information, transparency, efficiency, and control. It may have little sympathy for the concerns of Report Filers/Approvers. You'll need to bridge that gap.

**Travel Management**, as administrators of the organization's travel program, need to be able to assess the efficacy in achieving its goals. Expense reporting data, representing actual spend, is therefore critically important. But travel programs have goals other than financial. Traveler satisfaction very much matters (particularly of travelers who matter). A major focus then, of Travel Management, will be ease-of-use.

**Executive Management** wants to fulfill its responsibilities for internal controls without affecting the productivity (and accountability for that productivity!) of others in the organization. Count on executives to shift between the concerns of the Report Filers and F&A.

**The IT Group** labors long and hard to standardize technology. Without standardization, IT would be hard-pressed to fulfill its security obligations and provide support. IT may fear that introducing BYOD ("Bring Your Own Device") into the organization to facilitate travel could overwhelm IT with support requests and create unacceptable security gaps.

There are other constituency groups with other concerns; the point is, find out who they are, and discover their needs.

When you actually look at the multiple constituencies and what they likely care about, it's clear that the best system for you will have to accommodate trade-offs and compromises. The time to conduct internal negotiations is prior to procuring a system. Afterwards, you may have locked yourself in with a product that doesn't allow your organization the flexibility to get the necessary buy-in.

Finally, trying to enforce standards and efficiency on constituencies with a go-it-alone perspective just isn't going to work.

## CONCLUSION

As a business unit or functional leader, the more proactive you are regarding technology, the better. This is particularly critical for Time and Expense applications. Think about it; other than benefits and payroll, these two areas are among the most widely used in the company. For the corporation, improving efficiencies in Time and Expense mean adding to the bottom line.

For employees, a user-friendly, no-hassle way to accomplish necessary tasks that are considered chores can be an opportunity to increase employee satisfaction, retention, and even talent acquisition.

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### **About DATABASICS**

DATABASICS provides cloud-based, next generation Leave Management, Timesheet Management, and Expense Reporting applications.

DATABASICS fully integrates with your HR, Payroll and ERP/accounting systems, specializing in meeting your most rigorous requirements. DATABASICS offers the highest level of service to its customers around the world. DATABASICS is relied upon by leading organizations representing all the major sectors of the global economy: financial services, healthcare, manufacturing, research, retail, engineering, non-profits/NGOs, technology, federal contractors, and more.



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