

Software for Training Administration

By Joan March and Janet Bernhards

If you're drowning in training-administration paperwork, it might be time to automate. But how do you choose from the hundreds of software packages? The authors recommend a five-step process for finding programs that you can live with.

How many of us involved in the management or administration of training programs have yearned for a simple way to process everyday information—personnel, courses, schedules, instructors, and so forth? How many have wished for management reporting—course and participant statistics, and budget, accounting, and charge-back information—that is accurate, up-to-date, and easy to retrieve?

Many organizations have found a solution in the automation of training administration. Automation involves using a database program to store personnel, course, schedule, cost, and other training information. The user can then ask the computer to extract, list, and calculate pieces of information that would normally take hours to correlate manually.

Several years ago such programs were written in-house at great expense, and usually took many months to complete. While that option still exists (and may be the right one for your organization), we suggest looking at prepackaged software designed specifically to handle training-administration tasks.

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Many programs can even be customized to reflect your organization's unique needs. The result may be that you can save both time and money.

We recently reviewed some off-the-shelf packages for IBM PCs. The prices for single copies ranged from \$1,095 to \$3,800; prices for network versions were higher. When you are trying to decide on any software program, you

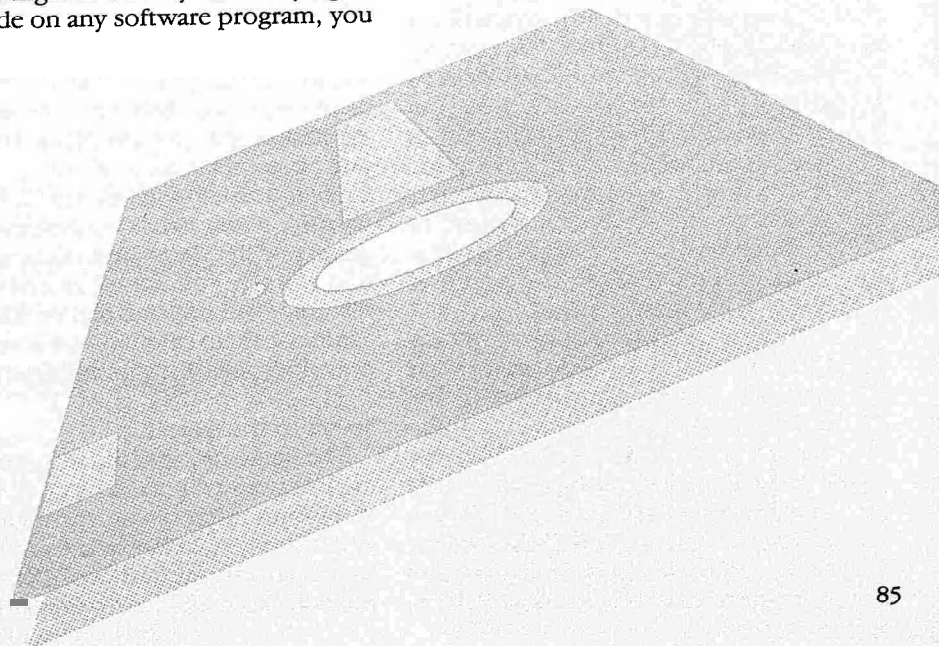
need to know its general capabilities for training administration, to have a process for researching and evaluating them, and to understand the criteria for making a selection.

Summary of capabilities

The packages we reviewed all track and report on typical training data:

- courses (title, time, date, location, and so forth);
- participants (name, title, address, employee number);
- registration and placement (status,

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course rosters, attendance, waiting lists);

- instructors;
- costs;
- calendars (usually no more than simple lists of course data).

What varies from one program to the next is the manner in which data are entered, viewed, edited, and reported. Some packages also offer such extended staff-development capabilities as skill inventories, needs-assessment features, and individual training plans. Some include ways to link up with other personnel and training databases.

Research and evaluation

We believe that you should approach the selection of any software the way you would buy a car. Decisions based solely on user recommendations or great sales pitches may prove troublesome when you discover your purchase has bugs or that the fancy extras you bought are useless to you and your organization. A methodical and thorough evaluation, though time-consuming, will pay off in the end. We recommend a five-step process:

- 1. Identify your organization's training-administration needs.
- 2. Locate as many software choices as possible and then narrow your search to two or three of them.
- 3. Review the programs and accompanying documentation.
- 4. Speak to suppliers about features, training, support, and maintenance.
- 5. Contact current users.

Identify needs

Knowing the needs and unique qualities of your organization can help you find a suitable product. Begin by defining what data are critical to your operation, and how management or your clients would like to view them. For example, some packages come with predesigned reports that can be changed only by the supplier at your cost; other packages allow you to create customized reports.

By identifying both short- and long-term needs, you can determine whether an automated system is going to be a quick fix for sorting out information or a long-term cost-saver. For solving immediate problems, you want to know what the system can offer you today; for creating a wish list for the future, especially in consultation with other departments in the organization,

you might consider packages that are modular—those to which you can add other training or HRD features.

Locate Software Choices and Narrow Your Search

Product brochures written by suppliers are good sources of information, but as with any advertising, you should read them critically. Seek out micro-computer software catalogs (available in most libraries) or information available through professional association publications (see the sidebar). Consider asking for descriptive literature and sample reports first—with them in front of you, you should be able to screen packages based on general factors such as cost, critical features, and

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technical specifications. For example, if your software budget must not exceed \$2,500 for the year, you have already eliminated several packages.

Review the Programs and Accompanying Documentation

Unless the supplier has a sales representative who can give you a personal demonstration, your first exposure to the software program will most likely be via a demonstration (demo) disk. They cost anywhere from nothing to \$45. The disk may be simply a slide-show explanation of features, or an almost complete system that allows you to enter and edit a limited amount of practice data. Similarly, the documentation may be anything from a one-page explanation of how to load the demo disk to a full-blown, detailed tutorial on how to use the system. The quality of the demo and documentation will give you a good idea of what the complete package will be like, so scrutinize them carefully and note any omissions, mistakes, or ambiguities.

Speak to the Supplier

The demo disk and the accompanying literature will not answer all your questions. After going through the demonstration, in fact, you'll probably have many more questions. Most suppliers are accessible and willing to talk

with prospective customers. The reception you receive now may be indicative of the help you will receive later—rude, uninformed, or hard-to-reach representatives don't bode well for future service and support.

Contact Current Users

Current users are a valuable source of information. If suppliers are willing to provide you with a few names, contact those people to find out about their overall satisfaction with the product. Ask whether any features do not work as expected. Inquire about the supplier's attitude and customer service, as well as its reliability and speed in responding to user queries and requests. Use the opportunity to ask the customers about their experiences with installation, implementation (how long it took to get the system up and running), learning time, and problems encountered along the way.

Selection criteria

Here are 10 criteria to help you select training-administration software. It may be important for you, the supplier, members of your organization, or current users to answer the questions in each category, so that you can compare products and services. We recommend putting the criteria in a chart format to analyze.

1. Software Features

The importance you place on particular software features depends on the needs of your organization. The following list includes some of the kinds of features available in the packages we reviewed.

■ **Record keeping:** Can instructors, courses, and classrooms be tracked easily? Is there a means of measuring enrollment of participants along with course completion, waiting lists, and cancellations?

■ **Reports:** Which ones has the program already defined? Is the reporting function sold as part of the package or is it an add-on feature that must be purchased separately? Can users select criteria for their own unique reports?

■ **Correspondence:** How are memoranda to participants handled? What about other correspondence? Can the program generate mailing lists and labels? Does it have word-processing capability? How extensive is it?

■ **Budgeting:** Can expenses (actual and planned) be tracked? Does the

system handle chargeback and tuition expenses? Can it download information easily onto a spreadsheet?

■ **Lists:** What kinds of paperwork can the system easily produce? Can it produce class rosters, course calendars, course schedules, or a course catalog? Can they be fit to user specifications?

■ **HRD information:** To what extent are employee development plans, career tracking, and related training incorporated into the system? Will those features serve a useful purpose in the

organization?

You may feel that other features are necessary in the operation of your training center. Before you make your purchase, the supplier should help you determine whether those features can be incorporated into the existing software and if so, at what cost.

2. Relevant Technical Specifications

Certain hardware or software specifications may be important, especially if you will purchase the software in

conjunction with hardware. Things to consider:

■ What are the monitor, memory, storage, and printer requirements?

■ Does the package run on a stand-alone PC only? Are network or mainframe versions available?

■ Are the various versions compatible—that is, are you able to upgrade from stand-alone to network?

■ Can you customize the program for your workplace? Can the user or in-house programmers do it, or must the supplier?

■ How many records can the database handle? How will large amounts of data affect the speed at which the program operates?

■ How many data fields (categories for data entry) are there? How many of them are predefined? Can the user modify field names and lengths?

■ Is the program sold as a complete product, or has the supplier designed it in modules? If it is in modules, what pieces are immediately necessary in order to meet current requirements? Future needs?

■ What provisions have been made for cleaning out files and records that are outdated or unnecessary?

■ What is the warranty period?

■ In what computer language is the package programmed? (Higher-level languages—such as dBase—have a reputation for being easier to change and maintain.)

3. Security

In most work environments, there is a need to secure or protect information, whether for reasons of confidentiality or for continuity of operations.

Does the system you are looking at

■ limit access to certain individuals?

■ limit access to selected information?

■ have a way to back up data automatically?

■ provide recovery procedures in the event of a catastrophe?

■ offer safeguards and checks to prevent errors in data entry?

4. User Support and Training

While some suppliers claim that their products are easy to learn to use and require little training, we have found that it is rarely the case. At the very least, a user must understand how the program functions before entering the first bit of data. The questions for which you want answers:

■ Does the supplier provide training and subsequent support? What kind?

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For how long?

■ What are the costs involved? Where does training take place?

■ If no training is available, does user documentation or a tutorial fill in the gaps?

■ Does the supplier provide a hotline? Is there an 800 number? What are the hours of support?

■ Will a supplier representative visit your site? Under what conditions and at what cost?

■ Is there a user group?

5. Updates and New Releases

No software on the market today is static—you should expect revisions at least once or twice a year. Questions you might ask:

■ How often can a new release be expected?

■ How does the supplier handle updates and bugs? How does it provide corrections to the client?

■ What influence do users have on changes made to the software? Is a change that is made for one user offered to all?

6. Documentation

Apart from training, the user's most important information resource is system documentation. The logical organization, accuracy, and comprehensiveness of the written guidelines and procedures have a direct impact on the amount of training and support the user needs.

■ Is the documentation complete? Does it contain a minimal amount of computer jargon?

■ Is there a tutorial that will acquaint users with important functions?

■ Is the documentation updated when the software is? How are changes incorporated into the user guide?

■ How is the documentation organized? Is there a table of contents or an index?

7. Time

Knowing the time factors associated with installing and learning the software will help you plan the implementation.

■ How long will it take to install the software?

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Software Selections

The following is a list of software programs the authors reviewed:

Skills Management System

The Administrator

Bensu Inc., 211 Gough Street, Suite 201, San Francisco, CA 94102; 415/626-6200.

The Education Manager

CDR Applied Technology Inc., Box 5076, Madison, WI 53705; 608/255-8081.

EDU-EZ

EDUCOS-II

Educus Training Management & HRD Systems, Automated Performance Technologies, 111 West 40th Street, 28th floor, New York, NY 10018; 800/343-5797 (in New York, 212/921-0411)

TR Plus

EDU-Records

HRD Software, 22 Amherst Road, Amherst, MA 01002; 800/822-2801 (in Massachusetts, 413/253-3488)

The Registrar

The Scheduler

Silton-Bookman Systems Inc., 20410 Town Center Lane, Suite 280, Cupertino, CA 95014; 408/446-1170

Resources and Suppliers

Association buyer's guides are good sources of software information:

1989 ASTD Buyer's Guide & Consultant Directory

American Society for Training & Development, 1630 Duke Street, Box 1443, Alexandria, VA 22313

1989 Data Training Buyer's Guide
Weingarten Publications, 38 Chauncy Street, Boston, MA 02111

The following directories should be available in most libraries:

Datapro Directory of Microcomputer Software, published by Computers & Communications Information Group, Delran, NJ.

Data Sources (Vol. II: Microcomputer Software), published by Ziff-Davis Publishing Co., New York, NY.

Another good source is **Microcomputers in Human Resource Management**, by Richard B. Frantzreb, published by Advanced Personnel Systems, Roseville, CA.

■ What is the supplier's estimate of how long it will take to input data and make the conversion from your current system to the new one?

■ What is the supplier's estimate of how long it will take people to learn to use the system, either cursorily or in depth?

8. Ease of Use

It is not enough for a system to boast a vast number of features. The layout of the system needs to be logical. For that reason you may wish to ask yourself these questions:

■ What is the logic of the keyboard? Do all function keys work the same throughout the program?

■ What other aids are there to help users quickly learn and easily use the system? Are there templates, on-line help features, mnemonics, readable screen-layouts and screen-prompts, menus, or a system of menu bypasses?

■ Does the on-line help system provide step-by-step procedures for executing particular functions, or does it merely explain the purpose of each function? Is help available at every screen for every feature?

■ Can data from other sources be

brought into the system in order to minimize data-entry time and errors?

■ Can you edit information on the data-entry screen?

■ Is the system highly code-intensive? (That is, do you have to formulate a comprehensive coding system for courses, classes, locations, and so forth before beginning to use the program?) Can those codes be viewed on the computer screen while you input data?

9. Costs

The cost of a basic software program may not seem too high, but coupled with other indirect costs, it can go up quickly. We have mentioned some of those costs in other criteria, and have summarized them here.

■ What is the cost of the basic system?

■ What is the cost of any add-ons that may be necessary to your operation?

■ Will you have to pay for updates and new releases?

■ What is the cost of a maintenance contract?

■ What are the training and support costs?

■ What are the supplier's charges for customizing software?

■ Will you need more hardware in order to implement the program? What will that cost?

10. Supplier Information

As with other major purchases, you want to find out whether the software producer has a good reputation and a commitment to its product and customers. In part, you can measure those things by asking the following questions:


■ How many users are there? What is the product's age?

■ Will the supplier provide references to some current users? What do those users have to say?

■ How many of the "really neat" features are actually in the software's current release, and how many are simply promised for future releases? What do other users say about supplier promises and delivery on those commitments?

■ How long has the supplier been in business?

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June 5 & 6—Boston, MA	Sep. 12 & 13—Phila., PA	Dec. 5 & 6— Los Angeles, CA
June 27 & 28—Chicago, IL	Oct. 3 & 4—Atlanta, GA	
July 11 & 12—New York, NY		

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