

IMPLEMENTING A RECORDS AND INFORMATION MANAGEMENT SYSTEM – Part III - QUESTIONS TO CONSIDER WHEN CHOOSING RECORDS MANAGEMENT SOFTWARE

During your search for records and information management software, it will benefit you to ask the following questions about what the software can and cannot do:

What records do I need to manage?

You should know exactly what records you are trying to manage and what problems you are trying to solve. Check with others in your organization about their records and information needs to help determine the best software solution.

What type of software will meet my needs?

There are many kinds of software that support records, information and content management. Be sure you are looking at the right type of product for your specific needs.

What software do other organizations use?

Contact other organizations to see what software they use and why, so you can determine what to avoid and what may work for you.

Is the manual clear and easy to understand?

Vendors should be able to provide you with a copy of the software's manual prior to purchase. The manual should outline how to use the software, and should include information on troubleshooting and contacts for any questions. Examine the table of contents and index for clarity, detail, and comprehensiveness. Make sure you can understand the manual and can use it without difficulty.

Is the software easy or difficult to master?

The software may be too complicated for your needs. A vendor may tell you that the software can do anything you want—but it may also do more than you need. Additional features that you will never use or need will probably cost more. Test the software prior to purchase; if it offers more options than your organization needs, consider other software packages.

Does the system do what it is supposed to do?

You know what you need to manage your records and information; make sure the software supports those needs. Maintain a list of what you want the software to do, and review the list as you test the package.

Are the screens helpful?

During use, screens provide access to operating procedures. These procedures should be easily brought up on a screen, and should be easy to follow and understand.

Are tutorials available?

Tutorials provide step-by-step instructions on how to operate a system. Tutorials are a bonus in any software package, but they must be presented logically, be written in simple language, and be able to answer your questions clearly and succinctly. Tutorials can also be good training aids after the system is up and running and no outside help is available.

Will error messages appear when an error is made?

Error messages should appear on the screen when you hit the wrong key or attempt to enter unacceptable data into the system. The message should be clear and easily

understood, and provide a recommended solution to the problem. Overriding an error should be permitted only in specific circumstances, as determined by your needs.

Is the system menu-driven?

A menu-driven system executes actions from a list or menu of options. The menus should lead a user smoothly through the system, requiring little interpretation or referral to the manual or to help screens. Menu screens should be easy to understand and organized logically. Shortcuts for experienced users, as well as secure but easy sign-on, should also be provided.

How fast is the system?

Make sure the software works quickly and that your computer can run it without shutting down periodically.

Does the software eliminate the need for redundant data entry?

You should not have to re-enter the same data into the system. You should only need to enter a particular data element once, in one location; it should then carry throughout the system.

Can global changes be performed?

You should have the capability to modify information in the entire system with a single change. With this feature, you can, for instance, change a department's name and update every occurrence of it throughout the system.

Is toggling between files allowed?

The system should allow you to shift back and forth between files or sections of files without having to save the current page, exit to a menu, and transfer to another section or file.

Are backup procedures provided?

The system should provide you with procedures to back up all of your data on a regular basis, and the ability to restore backed-up data if necessary. Determine whether the whole system will need to be backed up or just the data, and determine who will set the schedule to perform regular backups.

What kinds of reports can be generated?

The system should generate standard reports with little user intervention. For example, an inventory software program should generate standard reports of records series by location, department, or destruction date. Reports should be easy for users to format and print. Reports should also be exportable into delimited ASCII (for import into a separate database) or as straight ASCII text (for inclusion in word processing documents).

Are there other conditions to examine before purchase?

There may be conditions that exist within your organization that should be reviewed prior to purchase of any software. Budgetary flexibility or constraints will determine both the amount you spend on software, hardware, and staffing, and the cost of entering your data into the system. Consult your staff to determine their familiarity with computer use. Review what in-house support you may need. Engage the assistance of others in your organization early on and use their expertise as you plan your records management program.

Are there any special features I require?

Finally, there may be special features you may require in any software package you choose. These features may be included in the system, or may be enhancements to the

basic application. Some special features include bar coding, label printing, networking capability, and advanced security.

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