



CHOOSING THE RITE SOFTWARE

Navigate the ins and outs
of selecting software to
choose the right solution
for your program.



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The process to evaluate new software is daunting.

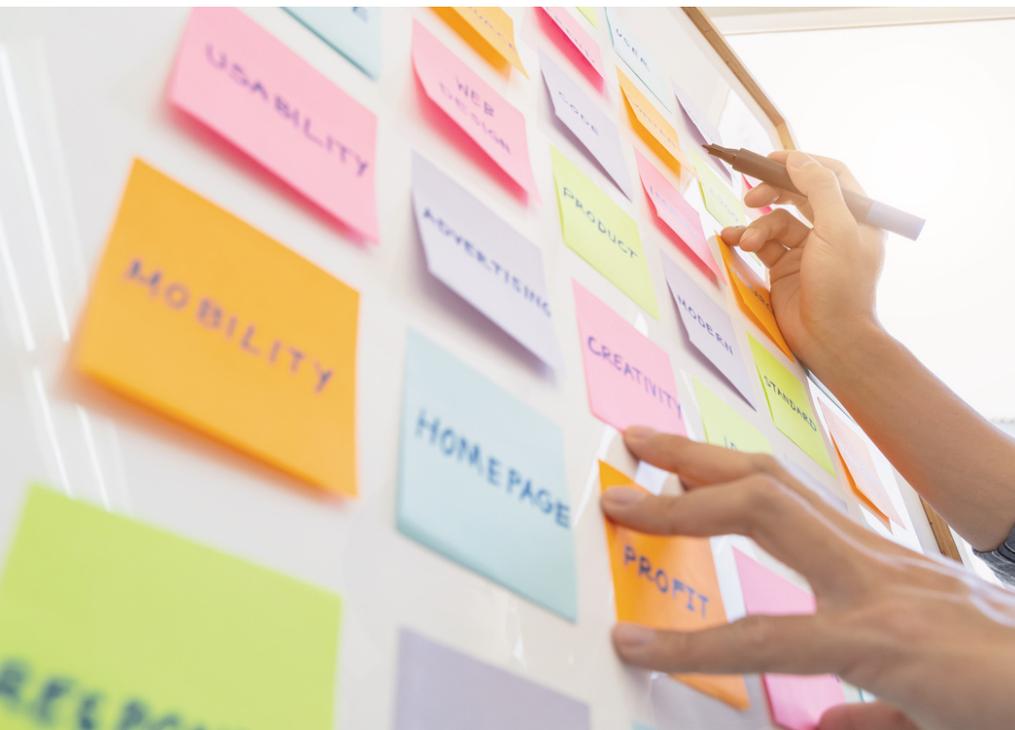
The process to evaluate new software for your program or programs can be intimidating and difficult to navigate. This brochure will help you to navigate the considerations that should be a part of the process and your decision.



The information contained here will provide a roadmap to determining if a software system would benefit your program, how to define your needs and wants, technical considerations, what types of offerings you will find, and how to determine which option is best for you.

Do you need software to manage your data?

- Do you have so many clients and/or cases that they are difficult to manage with your current process?
- Does information get lost in the shuffle and make communication across departments difficult?
- Do you have reports that are cumbersome and time-consuming to prepare, and how confident are you in the data?
- Do you anticipate a growth in clients or services that will necessitate a better method of tracking your data?
- Are you looking to be able to better track your services to identify which efforts are turning into positive outcomes for your clients?



**Yes?
We thought so.**

Software implementation in your program will increase effectiveness and efficiency in your processes.

How are you tracking your data now?

- Random paper trail
- Paper file system
- Spreadsheets
- An existing software system that isn't working anymore
- We haven't implemented a system yet



Do you have an existing system that you wish to replace?

Why isn't it working for you (anymore)?

What do you like about your existing system?

What needs to be fixed? What is missing that needs to be a part of a new system?

What features does your program require to be successful?

Must-
Have

- Ease-of-use
- Out-of-the-box functionality
- Customizable
- Notifications
- Web-based
- Mobile
- Integration
- Security

Must-
Have

- Hosting
- Reporting engine
- Configurability
- Document generation
- Portals
- Conversion of current data
- Something else:
-

What type(s) of data are you tracking?

What are the pain points or bottlenecks in your:

Processes

Data collection

Reporting

What problems are you looking to solve?

What's important to you from a technical standpoint?



If you haven't already, we recommend checking in with your organization's IT team to understand what technical requirements or restrictions you may need to consider.

Web-Based

Is being able to access your data from anywhere important to you? Over the past several years the inefficiencies of having software locked to a computer or office have become more recognized. The inability to work from home or on the road hinders production. Staff want and expect to be able to work from home, from a coffee shop, from the field. Web-based software gives you access to your system anywhere you have an internet connection, regardless of the computer or facility. These systems are accessible from a browser, and do not require VPN access to the system installed on a workstation at the office.

Hosting

Does your IT Department or laws require your system to be hosted on your own network and server(s), or is your IT Department looking for a cloud-based solution? If considering SaaS (Software as a Service) offerings, which often charge subscriptions for access instead of purchasing a system, be aware that your data may be shared with other vendor clients, and you may not be able to take over hosting in the future should you decide to do so.

Database

First-class software runs on an enterprise-level database. SQL Server and Oracle are two of the most common enterprise platforms, but SQL Server is found more often in both small and large agencies and is generally more compatible with other software systems. For those wishing to develop their own reports, asking if a data dictionary is available may be important. A data dictionary gives more confidence in the database design and in the documentation.

What's important to you from a technical standpoint?

Ability to work in the field

Unfortunately, not all web-based systems are mobile-friendly. If you have staff that are often working from the field, then this may be an important consideration for you. Determine what data and features you will require in order to be effective on a mobile device and confirm that the system's mobile experience accommodates those needs.

API

An Application Programming Interface (API) allows different software systems to "talk to each other." Do you anticipate wishing to interface with any other systems? For instance, Court software could interface with a Probation system to share appropriate information between the departments. Interfacing a financial services program with your accounting department can streamline processes. If so, you should look for an offering that includes an API and has experience implementing data transfer procedures.

Integration between departments

Want to securely and easily communicate data between departments?

One of the most powerful aspects of software is when it integrates the data of complimentary programs while ensuring that confidential information is secure. If you have an initiative to allow sharing of data between departments, integration is an important consideration. Be aware that the biggest hurdle to sharing information may be in getting all stakeholders to agree on how data will be shared! This is an internal issue; however, and outside the evaluation of a system or systems that will integrate your data.

As mentioned previously, security is paramount when evaluating an integrated system approach. Consider these questions when evaluating the security of a system: Can programs determine what information will be shared and how (view, add, edit, delete permissions) between departments and even within an organization? Are reports secure so that confidential information can't be accessed by running them? Will you be implementing a single system as an integrated database or interfacing two or more systems in order to exchange data through an API? If working with two or more systems, it is important to confirm if the systems can communicate and how they will do so. State-of-the-art software (like RiteTrack!) offers an API that is designed to enable and streamline interfacing with other systems.

Different Types of Software

Ready to search? Here is what you are going to find.



Product

This is a system that is “off the shelf” or “out of the box” which means that it will work for you as is, and is designed around best practices and requirements of other similar programs. Product offerings have the benefit of a stable software system that is being used in several locations. These systems can be configurable (personalizing the existing functionality for the client) or customizable (the ability to make more significant changes and additions to the software). A customizable standard platform is usually the sweet spot when looking for a system of this type. Implementations are faster and support is least for this option, which makes it attractive.



Done for someone else

If a vendor shows you a system that they have done for someone else and proposes that it will work the same way for you, be cautious. While these systems do work for the original customer, there are very likely data elements, forms, reports, and processes that are unique and specific to that operation. This makes the system more difficult to use as it was designed for someone else, even if their needs are similar. Changes to these systems often involve reverse engineering the original functionality, which is generally a bad idea for software design and stability and often results in less options to change in the future. Think of this option as wearing someone else’s clothes—they may partially do the job but you know they aren’t yours. Systems of this kind often also have whole sections of the software that aren’t used because they don’t apply to the needs of the new users.



Pure Custom

Vendors who do not have an existing offering or customer system that serves your needs may propose developing a new system from scratch. This option requires you to fully define everything that you want in a system. Think of it as having to create the blueprints for a new house, down to the door stops. As a result, custom implementations are the most time-consuming to build. Product companies develop these frameworks over years, they do not come about overnight. Due to the very custom specifications the system reflects, it is usually difficult to make large changes and your mileage with support will vary. While this option does give you full control over the design of your system, it is a significant investment in both time and cost.

Other Things to Consider

<p>Standard functionality and reports:</p>	<p>What comes “out of the box” with a system? What does the system do now vs. what can it do with additional work or changes? Ideally you want a system that will fulfill most of your priority needs with it’s standard functionality. You are most likely to get the most standard functionality with Product systems rather than one of the other more custom options. Do the standard reports allow you to see summaries and statistics about the data that are important to you? Do you have program, state, or federal reporting requirements that will be satisfied by the system? Be aware that if you are considering a system with more standard functionality than you need or will use, you are likely also going to be paying for those unneeded features. An overwhelming amount of functionality can also create a negative user experience due to unnecessary system complexity. Unhappy users are less likely to utilize the system properly and to it’s fullest extent, threatening the integrity of your data.</p>
<p>Data Conversion:</p>	<p>If you have a legacy software system and would like to bring that data into your new system, you will need to go through a data conversion process. Data conversion is a considerably more involved process than copying and pasting data between systems. First, the quality of the data to be converted must be analyzed to ensure no bad data is imported into the new system. Queries and reports should be run to identify this bad data, then decisions made on how to address the errors and inconsistencies. This may be done in a batch process of updating many records at once or manually to fix individual records.</p> <p>Once the quality of the data has been ensured, then fields from the existing system can be mapped to the new system. Fields that don’t have a home in the new system may be created and will help to define any customization required. If there is functionality in the old system that was never or is no longer used decisions should be made as to whether any of that data should be converted. When field mapping has been completed, iterations of the data import will be run and then tested side-by-side with the old system to ensure that all data was converted properly. While it requires time and effort, a data conversion can still be a good option if there is a lot of information to be saved from the old system and it would require significant data entry to transfer manually.</p>
<p>Implementation Services:</p>	<p>The purchase of a system like RiteTrack includes implementation services to ensure that the path to the final system is streamlined and painless as possible. These services include project management, configuration and customization, training, and support to ensure that a system is successful. What is the vendor’s implementation and project management methodology? How is quality assurance handled? How will the project and all of the decisions made along the way for the system be documented? Does the vendor offer unlimited support or is support limited to a certain number of hours or incidents before incurring additional cost? Checking references is critical in this area of consideration so that you gain first-hand insight into the implementation and support of your favored vendor. Did others enjoy working with this vendor? Did they deliver what was agreed to? Sometimes the relationship with the vendor can be just as important as the software being provided.</p>

Other Things to Consider

<p>Support:</p>	<p>No one wants to have to use support, but it is essential. Support and maintenance should provide you with an error-free system that staff are appropriately trained to use. Software is fallible of course and there are many factors that can affect even a very stable system such as changes to hardware or network configurations or other issues. Regardless of where the cause lies, if there are symptoms in the software, your vendor should be able to work with your IT team (if necessary) to eliminate any issues in a reasonable amount of time. The vendor’s support team should also ensure that staff are comfortable navigating the system, are using it regularly, and using it as prescribed by the program. If new staff come on, there should be training resources and online training sessions available to get them up to speed on your system. Like implementation services, support services can determine the long-term success of a system.</p>
<p>Experience in the field:</p>	<p>Does the vendor have experience working with programs like yours? This can be an important consideration. If they have experience, it is likely that they will better understand your needs from working with similar programs. If the needs of your program are new to the vendor, the chance of miscommunication will be greater and there will be a much longer timeline for them to become educated about your needs and processes.</p>
<p>Customizable:</p>	<p>Standard functionality is very important, but it is rare that a system will fulfill 100% of your needs as is. There are very likely intake forms, generated documents, assessments, or other information that you track that is unique to your program; and you will certainly want that included in your new system. Whether a system is customizable, how customizable, and the cost of customization (usually a function of hours), should all factor into this decision. Is the system designed on a customizable platform (more common with Product)? Or will changes need to be made at the framework and code level (often with less options for change and significantly more cost)?</p>
<p>Price:</p>	<p>Major decisions like implementing a new software system eventually come down to price. While price should not be the most important criterion, it should carry significant weight. As mentioned previously, product systems have a lot of functionality and features you may not need, and the price may reflect that. Be cautious of a vendor that is proposing to build a totally custom system for a price that seems too low. There is no easy button, and this may be setting you up for failure unless you are willing to invest more money in the future into your custom system. Make sure you understand the quotes and what is and is not included. It may be difficult to compare different vendor quotes as “apples to apples” due to different formats, but we encourage you to ask for clarification or questions from your favored vendors. Be clear on what are one-time and recurring costs, so that you can make an informed decision based on total cost of ownership over several years.</p>



We'll help you find a software that fits.



RiteTrack is a powerful web-based case management system used by tribes, counties, and states for a variety of social service and judicial programs. It is built on top of the latest web technologies and functions across most platforms that support a web-browser. RiteTrack helps customers inform better outcomes for their clients, programs, and communities.

REQUEST A DEMO

Why RiteTrack and Handel Information Technologies?



Product



Experience



Customers



Company



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