

# Reading, Writing, And Running Software

## *Does your staff know how to use your software?*

BY TED NEEDLEMAN

**T**here have been a great many changes in the way many nonprofits do their accounting during the past decade. SaaS (software as a service) and cloud-based accounting are gaining more traction, as is mobile accounting -- the ability to access your accounting system from a mobile device such as a tablet or smartphone.

What hasn't changed much is the constant need for staff to stay up-to-date on how to use the accounting system that's in place. Software changes, staff attrition, new hires, and employees taking on additional operational responsibilities mean that the person behind the keyboard might sit down in that chair without really understanding what they are supposed to be doing, or how they are supposed to go about it.

That often results in reduced productivity and efficiency in an economy where lean operations are an absolute must. The potential for error and mistakes takes a big tick upward with inadequate training. Having a system in place to handle your organization's ongoing accounting software training needs isn't just a good idea. It's essential.

In too many places, training consists of sitting someone down at a table or in front of a computer with the manuals that the software vendor has provided and telling that person "read the manual." Not only is this usually not the optimal approach, it often creates problems in addition to the ones implicit in untrained or poorly trained users.

### HAVE A PLAN

A written formal training plan is a necessity in most organizations. It doesn't have to be 1,000 pages long. This plan should outline when training will be necessary, who is responsible for arranging it, and how it will be carried out. Administrators and supervisors need to know where to turn in different training scenarios. Examine your organization to determine where and when training might be necessary before creating this plan.

Keep in mind that an accounting system is one application where a "one size fits all" training approach is defi-

nitely not an option.

Depending on which software package is implemented, training takes place at different levels and through various channels. Initial training on the software for all levels of staff whether administrative, supervisory, or operational, is generally performed during the installation by the supplier of the software -- directly from the vendor, or through a reseller if the software is licensed through them.

If an accounting system is offered as a SaaS cloud-based product, much of the training that takes place will also be accessed over the Internet. According to Gail Schilling, director of education for accounting software firm Intacct in San Jose, Calif., "most courses are provided via the web so that customers don't have to travel." Intacct's training isn't performed solely remotely. New customers are trained by either the vendor or by its value-added resellers (VARs) during the initial install. Ongoing courses are

available for all levels of users. Schilling said that an "Introduction to Intacct" is an initial course intended to provide users with the knowledge needed to use Intacct successfully, from navigating the menus to using all of the core Intacct modules. Online courses for individual modules, report basics and advanced skills, and an account administration course designed for those responsible for ongoing user management are all on the training menu.

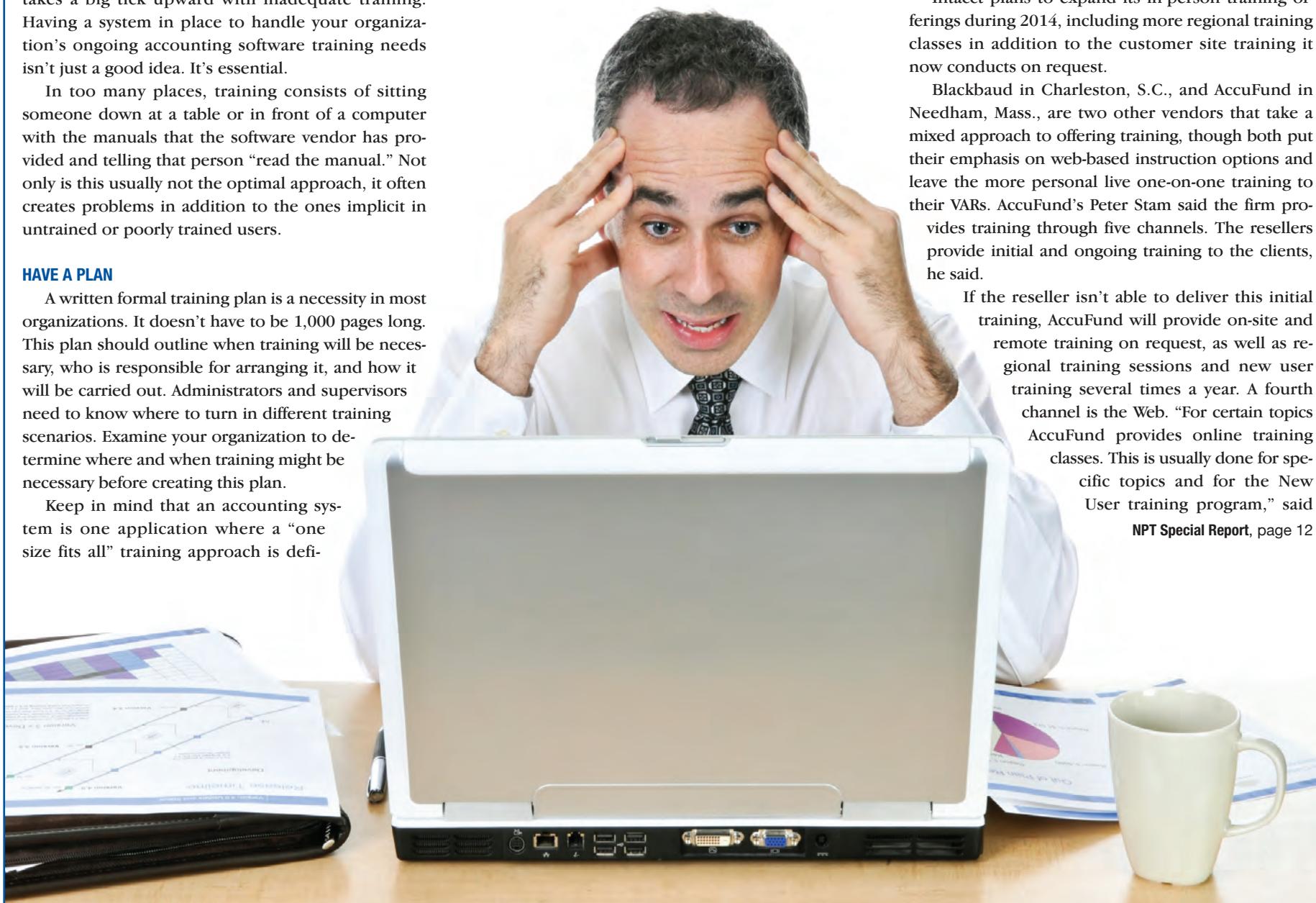
Shilling said that while training is a separate function from support within the company, several modules escort a user through the process. "For example, with our new Financial Report Writer, the system walks users through the steps to create financial reports. Each step includes overview information and offers contextual help to ensure users understand what they are doing and can get the most from the system," she said. While this is more of a support feature, it also provides training to a new user or one who hasn't performed the operation in some time.

Intacct plans to expand its in-person training offerings during 2014, including more regional training classes in addition to the customer site training it now conducts on request.

Blackbaud in Charleston, S.C., and AccuFund in Needham, Mass., are two other vendors that take a mixed approach to offering training, though both put their emphasis on web-based instruction options and leave the more personal live one-on-one training to their VARs. AccuFund's Peter Stam said the firm provides training through five channels. The resellers provide initial and ongoing training to the clients, he said.

If the reseller isn't able to deliver this initial training, AccuFund will provide on-site and remote training on request, as well as regional training sessions and new user training several times a year. A fourth channel is the Web. "For certain topics AccuFund provides online training classes. This is usually done for specific topics and for the New User training program," said

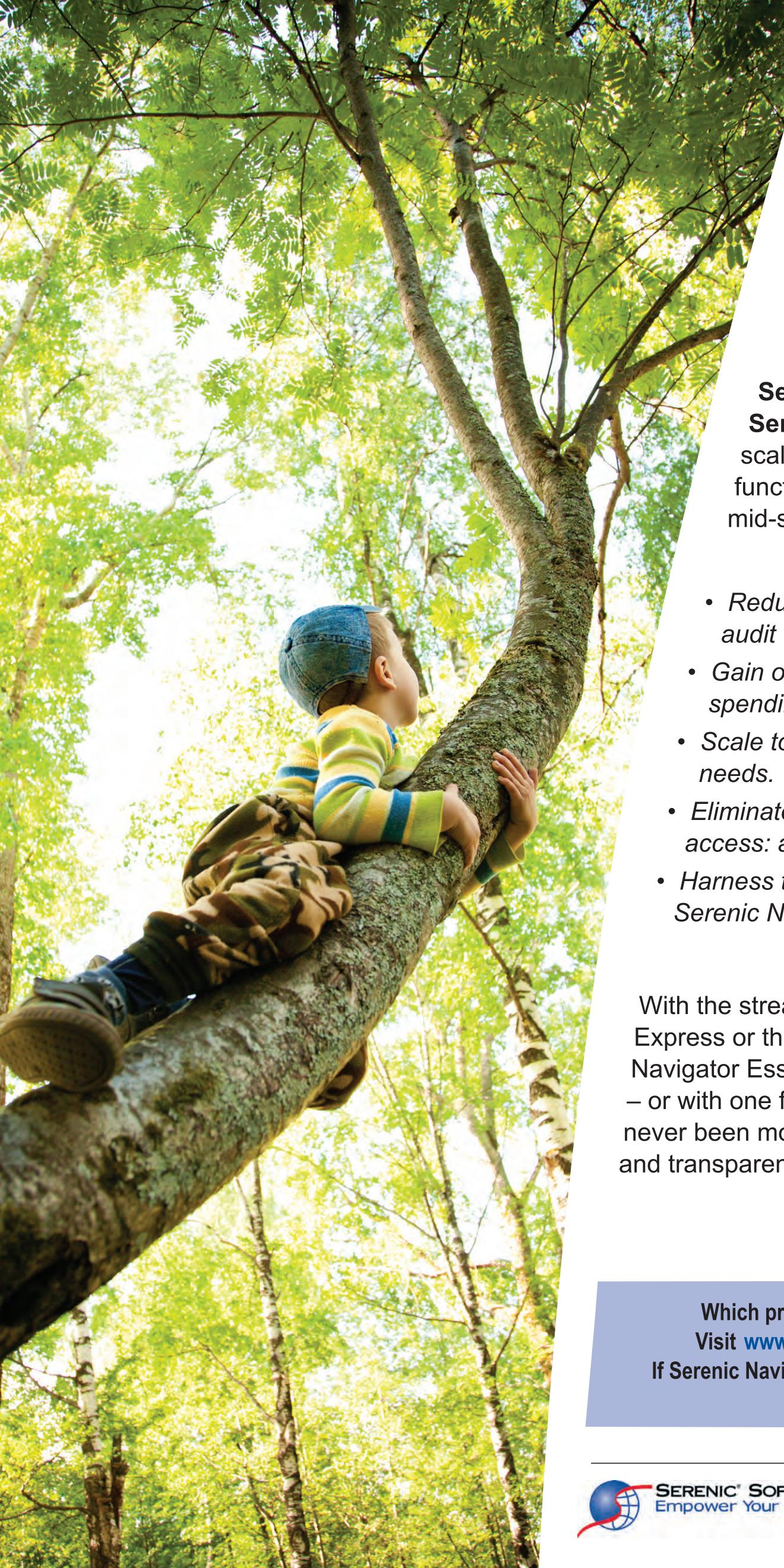
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Stam. Finally, a full complement of self-directed training manuals is installed with AccuFund. This lets clients learn aspects of the system in their own offices.

Blackbaud relies primarily on its own training offerings. A-la-carte training is available, if desired, but Blackbaud suggests clients subscribe to one of the formal training subscription programs. For The Financial Edge, these subscriptions can include tracks for Executives, Oversight, Financial Analysis, Financial Processing, and Data Entry. Each track has a mix of classroom and online components, though much of the online training is interactive.

According to Meredith C. Johnson, Blackbaud's director of educational services, the firm offers a variety of individual training options and classes, "but the best and most popular training package we offer is the Blackbaud Learn training subscription. It provides ongoing skill development and job knowledge training for customers' entire staff. Plus, the training subscription is a tiered offering so customers of all needs and sizes can find and afford exactly what training they need to be successful."

Serenic Software in Lakewood, Colo., is another vendor that formalizes the training process. "Serenic's training program, Serenic Ed, is designed to help customers minimize project risk and achieve operational excellence with training that is "just right" for their needs. New customer training is included as part of the software implementation process." According to Linda Nicholson, Serenic's vice president of marketing, new customers are initially trained by the person or team that performs the software implementation and installation. Customers can contract with Serenic for addition training which is provided via the web or on-site at the customer's location.

Abila software is a new name but not new product. It originally was MIP and then was sold to Sage Software. A private equity group bought the nonprofit products and named the company Abila. It also reverted some of the product names back to MIP.

Abila has both formal classroom training at Abila University in its Austin, Texas headquarters and Certified Training Partners that provide regional training both on-site and in classroom settings. Abila MIP Fund Accounting Software has been around for several decades, from the original developer, through Sage Software, and now Abila. There are a number of third-party developers with training programs.

The McGovern Consulting Group is one such developer, with a series of online video courses under the TrueNorth label that cover aspects of using the MIP system. JMT Consulting is another Abila trainer, based in Patterson, N.Y. It conducts training in the various Abila offer-

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ings in a variety of settings, including regional classrooms and with online courses and webinars.

JMT CEO Jacqueline Tiso said that in many organizations budget considerations dictate the approach taken in fulfilling training needs. She added, however, "the most successful trainings are those that are delivered at the client's location, on a sandbox copy of their own database, and on a timetable that works for the client. Contrary to most publishers' models, we do not believe that a set number of days of formal standardized classes on a demo database are in the best interest of our clients and their ultimate success with their new system."

Some nonprofit software vendors, including Intuit, which markets the Nonprofit Editions of its QuickBooks applications, rely on a system of resellers and consultants trained in using the software. The vendor's ProAdvisor program certifies that a reseller and/or consultant has passed a rigorous exam to demonstrate knowledge of the product on which they are being certified. Intuit's ProAdvisor program has enrolled a considerable number of accountants and bookkeepers, some of whom are resellers, others emphasizing consulting, though these backgrounds are not a pre-



requisite for becoming a ProAdvisor.

Dawn W. Brolin, CPA, MSA, runs Powerful Accounting in Windham, Conn. Brolin is an Intuit ProAdvisor certified on most of the QuickBooks products and is a frequent speaker who also does extensive training on the various QuickBooks editions that the firm sells, including the Nonprofit Edition. She emphasizes an area that many organizations, especially the smaller ones, overlook in both installation and initial and ongoing training. "Typically, we help them with compliance, informative reports, and help them understand the importance of good internal processes."

**For certain topics AccuFund provides online training classes. This is usually done for specific topics and for the New User training program.**

--Peter Stam

Brolin's emphasis on compliance and internal processes is an area that sometimes slips through the cracks, especially in nonprofits with a mostly volunteer staff and with minimal involvement of an accountant or accounting practice that understands the compliance and control issues faced by a nonprofit.

## WHAT'S THIS BUTTON DO?

Most of the major vendors of nonprofit accounting have very active user groups and hold yearly meetings. These are settings for seminars on a wide variety of operations, implementation, and other issues. On the executive level, consider formal courses given at local colleges to bolster understanding on accounting in general. Several hundred colleges and universities have programs

in nonprofit administration that can provide useful insights into the running of a nonprofit from an operational standpoint that includes accounting.

Training costs vary greatly, depending on who provides it and the type, such as webinar or in-person classroom. If the training is provided on-site at your location, it can cost \$200 an hour or more plus travel. It doesn't matter if the vendor, a reseller or a consultant provides the training. Web-based training varies from free (especially if you have a training subscription plan where you pay a yearly fee), to several hundred dollars per person per course.

Regional in-person training costs are also variable. Some vendors charge a fixed fee where several participants from the same organization attend. Other vendors charge a per person fee. Negotiate this fee upfront as part of the deal and you'll save money. The vendor wants to sell the application and that subscription fee. They often deal on training costs.

User group meetings often provide a good training value, but only if the particular sessions really address the areas in which your staff needs training.

There is no perfect training solution. But if you pay attention to where you anticipate needing more than just a set of

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manuals, you can put your training budget to its best use.

## ROLL YOUR OWN?

In creating a training protocol, the item always at the top of the list is to determine the vulnerabilities. It's a known fact that many users will never read the documentation that vendors provide for a system that they or one of their resellers installed. And, in many cases, the manuals or training materials will not be all that applicable to a new hire or temporary employee or volunteer, even if they have gone through a formal training course online or at a vendor or reseller location.

Sometimes there are areas where a do-it-yourself approach is not only feasible, but a better alternative than constantly using outside training support. This is especially true in the areas of data entry and report generation.

While it's probably not a good idea to circumvent vendor or reseller training completely, there are a number of good reasons to supplement it with content created in-house. It's generally more cost effective than turning to formal training every time a new staff member needs to be quickly brought up to speed.

Another plus is that it provides a step-

by-step guide to performing a specific task, whether it is transaction recording, sending out a pledge request, or generating a report. The best part is the step-by-step screen captures of the actual system in place, with any customizing that has been performed during the installation or subsequently, not of some generic "demonstration" system. The menus match those the person operating the computer will see, and the drop down menus and entry fields will be identical.

These step-by-step operations guides take a little effort to prepare, most of which is describing what the user is seeing and communicating what actions have to be taken on a specific screen. If the system is changed or updated, the step-by-step operator's guide will have to be amended.

The effort is well worth it if you need to have a temp fill in for a few days and can't afford the time and/or expense spending the better part of a day bringing them up to speed on what to do. If they forget what they are initially shown, looking at a step-by-step guide with screen captures and action descriptions should prevent a lot of problems and calls for help every 10 minutes.

Performing screen captures isn't difficult. They can be done using the "Print Screen" key on the keyboard. But, anno-

tating these is not very easy. One utility that's useful is SnagIt from TechSmith. It does great screen grabs and the Editor that's part of the application makes it simple to add balloon notes and gray-out or magnify specific areas of the screen to emphasize where an entry or action is performed. SnagIt isn't the only utility for this function. There are similar utilities available for Windows, Mac OS, and even Linux.

## TRAINING NEEDS CAN CHANGE

Training is more than having a staff member or employee sit down and have someone explain tasks, either in a formal setting or an informal one. It's more than taking them through the tasks they need to use, and making sure that they know how to do them.

Training is also making certain that the accounting system produces accurate results, in a timely manner, and in an understandable format. That encompasses source data collection, data entry, processing and reporting. Some staff will perform all of these functions, others will work in just one area.

An important part of the process is thinking about which resources can be provided to staff when they have a question, encounter a problem, or simply forget how to perform a task that they

do infrequently. Don't obsess over this, but the time to think about is before it's needed. Part of the training system that's implemented should have a "Plan B" built into it.

However it's gone about, the core of any training plan is to first realize that most computer applications are not inherently intuitive, and that accounting, especially nonprofit accounting, is not something that most users, at any level, can work on without some guidance.

As long as this central point is understood, training can work from there to meet your organization's specific needs and circumstances and keep staff at its most effective and productive level.

Finally, understand that "training" doesn't have to be narrowly defined. User Group meetings, professional nonprofit and accounting society meetings, and blogs all provide tips and techniques that may prove advantageous as a supplement to more formal training.

Working within a fixed budget is a fact of life. But for the most part, accounting software vendors seem to agree that training should be recognized as an important and separate from support part of operations, and budgeted for accordingly. Training options need to be looked at carefully so that the budget provides the greatest returns. **NPT**



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