



PEOPLE POWERED PERFORMANCE

VANGUARD FREQUENTLY ASKED QUESTIONS

This white paper provides answers to many questions procedure managers, procedure authors, and IT managers ask about Vanguard.

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WHAT IS VANGUARD?

Vanguard is a specialized application designed to let you create, manage, and distribute safer operational procedures faster. Storing XML-based information in a relational database for secure management and distribution, Vanguard SmartProcedures provide a number of advantages over word-processed procedure files.

Single-source: Vanguard SmartProcedures leverage XML to separate format from content, so a procedure can be formatted for any output device. This prevents duplication of effort and saves time and money.

Built-in Version Control: You don't need an external version control application with Vanguard, because version control is built in, both at the step and procedure level, ensuring current information at all times.

Centrally Managed: With Vanguard, you create centrally-managed templates to control structure and formatting, freeing procedure authors from the time-consuming task of applying formatting. Because authors can concentrate on more important issues, such as human factors, they can create safer procedures.

Searchable: Because Vanguard procedures are stored as steps in a relational database, it is easy to search for and reuse step-level content. This also makes it easy for users to access and use the correct procedure fast.

Vanguard is the specialized application you need to create, manage, distribute, and update structured operational procedures to help your organization comply with government regulations or business best practices.

For more details about Vanguard and SmartProcedures, see the *Advantages of Vanguard SmartProcedures* white paper.

QUESTIONS AND ANSWERS ABOUT VANGUARD

To help you better understand how Vanguard lets you create better, smarter procedures faster, read the following frequently-asked questions and their answers.

About Creating Procedures

The following questions and answers provide insight about creating smarter, faster, better, safer procedures using Vanguard.

➤ **Why would I use Vanguard to create procedures instead of the word processor I am used to using?**

While you can use word processors to create many types of business documents, you also waste a lot of time - up to 50% of your time - applying formatting.

Vanguard provides procedure templates that enforce not only formatting, such as fonts and numbering, but also document structure.

Because Vanguard automatically creates many elements, such as cover pages, table of contents, and glossaries, using Vanguard makes creating procedures faster.

With all the time you save using Vanguard, you can focus on what you do best, improving the clarity and safety of your procedures.

➤ **Can we create different templates for different types of procedures?**

Vanguard lets content managers define templates to meet any need. Unlike word processing templates, Vanguard procedure templates provide format, but also structure definitions. If your procedures typically use different structures, you can create Vanguard templates for each procedure structure, or type, that you use.

Vanguard procedure templates also differ from word processing templates in a unique way: Vanguard templates actually enforce formatting and structure, so all procedures of the same type are more consistent, making it easier for operators to find the information they need.

- **I understand that Vanguard uses XML, but I thought the new version of Microsoft Word will also support XML.**

Many of the Microsoft Office 2007 products support XML. Supporting XML is not enough. Microsoft produced a “development map” to show how its Office 2007 products can be used to *develop* an XML solution. For more information, you can download the map at:
<http://msdn2.microsoft.com/en-us/office/default.aspx>

With Vanguard, you can start using cutting-edge XML technology *today* to provide single sourced FlexViews without spending a lot of time *developing* a solution.

- **How does using Vanguard make creating procedures faster?**

- Authors spend less time formatting
- Templates define structure automatically
- Vanguard generates content automatically, such as cover pages, tables of contents, and glossaries
- Global reference objects make updates fast and easy

- **What is the typical time savings using Vanguard to create procedures over using conventional authoring tools such as Microsoft Word?**

With other word processors, writers spend up to 50% of their time formatting. Since Vanguard templates apply formatting automatically, writers have more time to focus on safety and human error reduction.

In addition, the Vanguard step analyzer checks procedures for writing errors that can cause confusion, such as two actions in a single step, to help writers create *better* procedures faster.

About the Edit and Review Process

Managing editorial and content reviews is often challenging, especially in large or multi-site organizations. The following questions and answers show how you can use Vanguard to simplify and automate the review and approval cycle.

➤ **Many times I cannot publish a procedure because my reviewers don't return comments. How can Vanguard help?**

When you use the Vanguard solution for creating procedures, you tap into an automated review and approval (change management) workflow system. When you create or modify a procedure, simply send it for review, with the click of a button.

The workflow management system notifies reviewers by e-mail that a procedure is ready for review. The reviewer can then comment on the procedure online, step-by-step, using the Vanguard web portal.

When the review is complete, Vanguard displays the review comments in the author's To Do list. The author can then easily modify the procedure and send it for further review or approval, all automatically.

➤ **How does Vanguard handle change management?**

Using the integrated change management system, system administrators can define the review and editing life cycle. Then any time a procedure is ready for review, it is routed among reviewers, approval authorities, and procedure authors until it is approved.

The system automatically notifies reviewers when a procedure is waiting for approval. If reviewers do not respond within the defined time, the system escalates the notification to the reviewer as well as a procedure sponsor.

About IT Integration

The following questions and answers discuss common IT management concerns.

➤ **What are some of the installation considerations for Vanguard?**

Because Vanguard is primarily a web-based application, administrators and operators access it using a web browser with no local client installation required. The Vanguard Editor, used only by a few procedure authors, requires a local client. However, you can automate client installation using scripts or group policy.

➤ **Do I have to manage another set of login credentials for my users?**

Vanguard supports integrated Windows authentication, so your users don't need to remember another set of credentials. And Vanguard requires no secondary credentials.

➤ **What are the hardware and software requirements for Vanguard?**

Hardware and software requirements depend on how many users you plan to support and are typically defined by the database software you use.

For detailed hardware and software requirements, see the *PRiSM Version 5.0 Requirements* white paper.

About Current Data

When you plan to introduce new functionality, it is important to integrate with other systems and data sets. The following questions explore how Vanguard works and plays with other products and data stores in your organization.

➤ **We already own a content management system, such as LiveLink, FileNet, or Documentum. Isn't Vanguard redundant?**

Vanguard is not an enterprise content management system in the conventional sense. Vanguard stores procedures at the step level in relational database, so you can provide access to this critical safety and operational information quickly to operators on demand. Vanguard complements your content management system and works seamlessly with it.

Because Vanguard lets operators access the information they need in the format they need it, with FlexViews, Vanguard provides procedure-specific improvements over paper-based documents and improves overall plant safety.

➤ **I already have equipment databases and chemical databases, can Vanguard read from these?**

If you have data you would like to reuse with Vanguard, ATR can help you develop scripts so Vanguard can leverage your existing data and keep it updated automatically.

About Converting Procedures to SmartProcedures

When you are ready to move to Vanguard, you will want to consider how to manage your existing procedures.

➤ Do we have to convert all of our procedures into Vanguard?

To maximize your ROI with Vanguard, you should work with ATR to import all your procedures into the Vanguard database. ATR has a comprehensive system to help you convert your existing procedures into SmartProcedures so you can reap all the benefits of Vanguard, such as FlexView single sourcing, streamlined procedure development, improved searchability, and reusable procedures steps.

➤ How does ATR help us convert documents to SmartProcedures?

For more details about how ATR helps manage your conversion to SmartProcedures, see the *Converting Documents to Vanguard SmartProcedures* white paper.

➤ Can we convert procedures ourselves?

Depending on how well-structured your current procedures are, you should be able to import them to Vanguard yourself with the Import Filter. However, ATR recommends we work together with you to develop the best plan to convert your procedures so you can quickly benefit from using Vanguard SmartProcedures.

About Ease of Use

Not all Vanguard users in an organization are computer savvy. Vanguard helps even inexperienced computer users get the information they need, in the form that best meets their needs.

➤ **Can inexperienced computer users easily find the procedure they need?**

Because Vanguard stores procedures in a relational database, the product can provide many search criteria to help users quickly find the procedure they need. For example, if operators do not remember the title, they can also search by author, physical plant location, equipment, process, keyword, or numerous other search keys.

➤ **Our workforce is aging and we need to upgrade our procedures. How can Vanguard make this process easier?**

Vanguard provides FlexViews, various ways to output procedures depending on the operator's needs. For example, if they need a larger font to make the procedure more visible, you can create a FlexView that provides large fonts. If you want to add video demonstrations of performing a task in a training FlexView, you can link the video.

Vanguard provides many ways to deliver your procedures to different devices and media, so your users can easily get just the information they need, when they need it, in the format most useful to them.

About ROI

Developing procedures to comply with regulations is typically a costly, but necessary, expense.

- **How can we achieve a return on investment using Vanguard compared to our current procedure system?**

Vanguard provides continuous cost-savings that can dramatically reduce the cost of procedures over the lifetime of a procedure. After an initial uptick while you convert to Vanguard, the product saves you money continuously, when compared to your current procedure system. Typical overall cost reductions of 20 to 40% are possible, depending on a number of factors.

Figure 1: Vanguard Reduces Cost of Procedure Development and Maintenance



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Patent Pending, 2006.

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