



SmartProcedures and Document Management Systems



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WHAT IS SMARTPROCEDURES?

SmartProcedures is a specialized procedure solution that streamlines all phases of the procedure lifecycle. SmartProcedures makes it easier to create, manage, and distribute *better, faster, safer, and smarter* procedures.

Breaking through the limitations of conventional procedures, SmartProcedures controls information at the step level to provide flexibility, portability, and intelligence.

Storing XML-based information in a relational database for secure management and distribution, SmartProcedures provide a number of advantages over word-processed procedure files.

BETTER

- SmartProcedures let you create more consistent, well structured procedures by enforcing formatting and structure from centrally-managed templates.
- Because SmartProcedures can include other information resources, such as work guidance media, SmartProcedures can reduce human error risks.
- SmartProcedures FlexViews® can transform a single procedure for output to multiple formats or devices, based on user need and context.
- Reducing the time writers spend formatting procedures by up to 50%, writers using SmartProcedures can focus on higher quality content.

FASTER

- Because writers spend far less time formatting with SmartProcedures, they create procedures much faster.
- SmartProcedures automates creation of cover pages, tables of contents, glossaries, and other document components.
- SmartProcedures provides integrated edit and review workflow technology to automate the edit, review, and approval cycles.
- FlexViews speeds the training process and reduces training time, while improving comprehension and retention.

SAFER

- The SmartProcedures step analyzer helps remove vague and confusing language, ensuring greater safety guidance.
- Because writers spend less time formatting, they can focus on higher quality content and safety issues.
- SmartProcedures includes access to related safety information, such as work guidance media.
- Because SmartProcedures offers FlexViews for use with PDAs or tablet PCs, field operators can have instant access to hundreds of procedures on demand.

SMARTER

- Interactive SmartProcedures can capture signatures or data to verify proper adherence to safety guidelines.
- Each step can include visual guidance or electronic training media to ensure operators understand the task and safety requirements.
- FlexViews let you distribute procedures to multiple devices from a single source, providing access to the information without duplication of effort.
- Training views can provide a show and tell approach to make the information more accessible, resulting in safer operations.
- SmartProcedures is the specialized application you need to create, manage, distribute, and update structured procedures to help your organization comply with government regulations or business best practices.

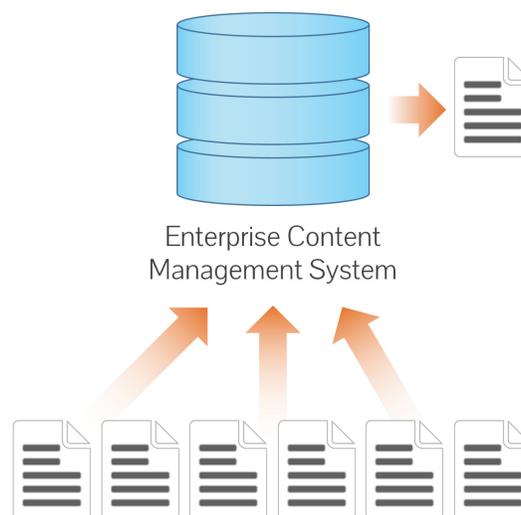
UNDERSTANDING DOCUMENT MANAGEMENT SYSTEMS

Enterprise Content Management (ECM) systems, Content Management Systems (CMS), or Electronic Document Management (EDM) systems are designed to help IT groups and their users store, index, locate, and share data files across an organization. You may be using one of the following types of ECM products:

- EMC Software ECM and Documentum products
- Open Text Corporation and Hummingbird Enterprise products such as Livelink or PC Docs
- Lotus Domino products
- FileNet P8 Platform products

Document management systems address a very real data management need: cataloging, sharing, and providing searchability across many files.

Figure 1: Document Management Systems Help People Locate and Share Files



Other file sharing approaches, such as Microsoft SharePoint, provide a web portal where users can post links to files in a collaborative environment. Using this approach, team members can share files with other members of the group to annotate, copy, or use the information.

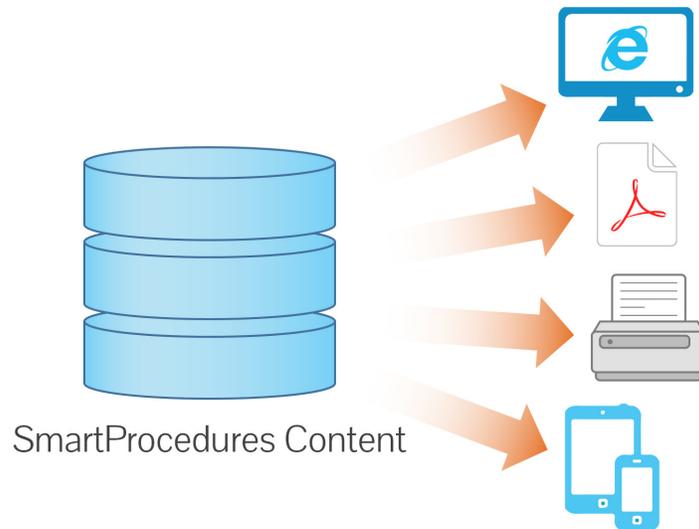
HOW SMARTPROCEDURES DIFFERS FROM DOCUMENT MANAGEMENT SYSTEMS

SmartProcedures is not a general-purpose document management system. SmartProcedures provides a relational database that stores procedure steps and assembles SmartProcedures on demand for a specific output device.

Because SmartProcedures does not create procedure files, it does not require a document management system.

SmartProcedures are not files — they are dynamically-created views of procedure and step information stored in a database. To access a procedure using the SmartProcedures web portal, users search to locate a procedure, and then click View.

Figure 2: SmartProcedures Assembly On Demand



SmartProcedures assembles the procedure from step objects in the relational database, applies the specified view template, and creates the output. The output is the usable result, but the procedure content is still maintained in the database rather than as a file.

SAFER, MORE ACCESSIBLE PROCEDURES

Because SmartProcedures stores and indexes all steps, procedures, and output views internally, it does not require a document management system to help users locate, share, or search for specific information. Even though SmartProcedures manages its own procedures, it is not a document management system in the conventional sense.

Using versatile FlexViews, SmartProcedures can provide operators with hundreds of procedures instantly accessible from a PDA or other handheld device. This convenience makes it more likely an operator will use the proper procedure, and makes them available even in remote settings.

Ensuring operators can access the information they need in the format they need it is just one more way SmartProcedures makes your operating procedures safer and better.

HOW SMARTPROCEDURES COMPLEMENTS DOCUMENT MANAGEMENT SYSTEMS

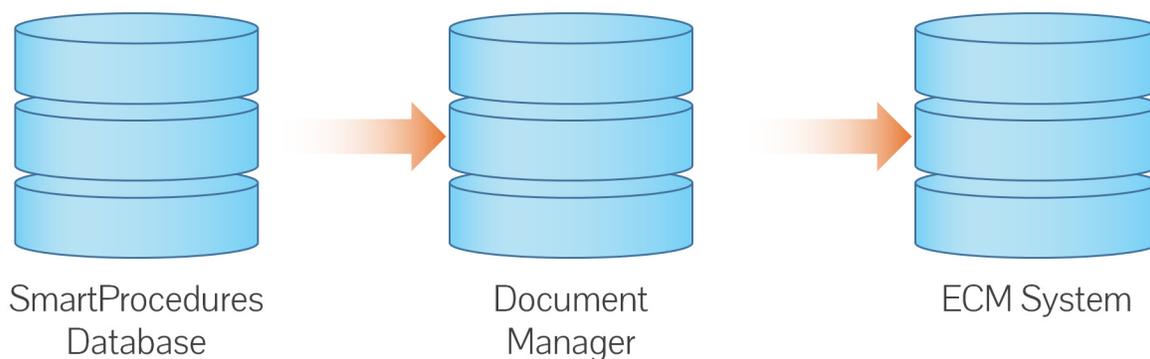
SmartProcedures provides added safety and performance capabilities not available using word processors. For example, additional information can be linked in a Training View that helps operators understand and learn operational tasks, for better retention and safer operations.

While SmartProcedures provides procedure management and version control capabilities, it can also work hand-in-hand with your existing document management system.

The PRISM Performance Suite, which includes SmartProcedures and other products, also includes an internal Document Manager, which can serve as an interface between your document management system and SmartProcedures.

The PRISM Document Manager continually updates the cross-references to documents in your document management system. Using this integration allows you to create SmartProcedures with references to external documents in your document management system.

Figure 3: Document Manager Integrates with Your Other Management Systems



Another approach is to provide access to SmartProcedures from your document management system. To accomplish this, simply publish SmartProcedures in a common format, such as portable document format (PDF), and add the PDF files to your document management system document vault.

SMARTPROCEDURES INTEGRATED DOCUMENT MANAGER

If your organization does not currently use a document management system, you can take advantage of ATR's Document Manager. This technology is integrated with SmartProcedures to perform a similar function.

Document Manager is not a full-function document management system; however, it offers many of the benefits of using document management systems. For example, if you commonly need to share many types of files, you can use Document Manager to index them. Then, using the web portal, users can search and locate documents using a variety of search criteria.

SmartProcedures utilizes Document Manager to provide access to its procedures, as well as online training modules, reference documents, drawing files, and other files you need to share globally. Because you can store many file viewers on the server, you may no longer need to distribute these for installation on every workstation.

OTHER TECHNOLOGY ADVANTAGES

SmartProcedures uses a web-portal approach to offer access to all its integrated features and functions. For example, SmartProcedures integrates an edit and review cycle workflow system, as well as connectors to its training and tracking system.

Because SmartProcedures technologies are fully integrated, using a relational database and .NET technology with web access, the products are easy to install, maintain, and implement.

Provides Streamlined Installation

Installing SmartProcedures, part of the PRISM Performance Suite, makes all the features you license immediately available. Only the Editor, used by a relatively few procedure authors, requires client-side installation.

Based on Standard Infrastructures

The SmartProcedures system uses reliable standard infrastructure components, such as Microsoft Internet Information Services (MS IIS), .NET Framework, and Microsoft SQL Server databases. Administering does not require additional specialized knowledge.

Provides Integrated Windows Authentication Support

SmartProcedures supports Windows authentication, so your users do not need to remember yet another login ID. This also means IT and the Help Desk do not need to perform additional maintenance and support to keep users up and running.

Uses Your Existing E-Mail System

PRISM can use your enterprise email system to send notifications of system events. For example, when a procedure author sends a procedure for review, SmartProcedures notifies the reviewers using your enterprise email, reducing the number of systems you must maintain.

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