ZAVANTA®
OVERVIEW & FEATURES CHECKLIST

Zavanta is a web-based Knowledge Transfer application for capturing, managing, and sharing Processes, Standard Operating Procedures (SOPs), Policies, Work Instructions - all the information employees need to perform their jobs.

Zavanta gives you everything you need to get know-how out of experts' heads and into an easy-to-maintain "system" that you can manage with, train from, and that regulators love.

In place of old-style manuals and messy Word documents, you have a modern communication system that actually IMPROVES processes, products, and customer satisfaction.

CONTENTS

What are your options? 2
Zavanta Features Checklist 3
Zavanta Summary 4

COMPROSE has worked with hundreds of organizations in this area for over 30 years; we're very familiar with the product landscape. Over that time, we've seen all the trends and various products come and go.

Today, there are many options, including "do it yourself" methods. No single product is a fit for everybody, including Zavanta. We've created this short guide to assist you in understanding the various options and how Zavanta compares.
WHAT ARE YOUR OPTIONS?

**General-purpose, free-form tools** (MS Word, MS Excel, Evernote, Google Docs, Wikis) have serious limitations, especially for development and ongoing maintenance. Because they lack structure, authors make mistakes that impact performance and waste excessive time. Even with a word-processing template, there is no way to control content quality, eliminate redundancies and inconsistencies. Manual formatting and clerical tasks waste time. Documents produced this way are usually designed for print and don't work well on mobile devices. Bottom line: MS Word is not an effective tool if you are really serious about Knowledge Transfer.

**Document Management systems, such as MS SharePoint** are great at managing documents, but they do not help you with the content creation and ongoing maintenance. So, you're back to relying on a word processor for content. These systems are expensive and require serious IT resources. We have seen companies waste thousands, and even over a million dollars, creating a knowledge/document management system that looked good on the surface but didn't get used because the content was so bad. If you have MS SharePoint or a DMS/CMS system, an approach we've seen work well is to use a content tool that is compatible. *(Note: Zavanta has an API for MS SharePoint.)*

**SOP-specific tools** are a good fit if you have a short term project or you only need to document simple tasks. Most of the tools in this category are limited in terms of customization and don't address the array of content types you'll need for a long term performance solution, such as Policies. Some products in this category provide task automation (business process automation) so if this is your CORE priority, one of these products may be a good fit for you. **Policy Managers** lack an easy way to create Procedures. So, if you pick a tool that is strictly SOP or Policy, you're tied to a single use.

Some people have the misconception that a **Learning Management System (LMS)** can be used to capture and communicate policies and procedures. That's not their purpose, and they do not provide an interface to do this. The policies and procedures you create serve as the foundation for training and can be referenced in your LMS. The optimal approach is to LINK your published policies and procedure to your LMS, make sure the systems work together.

**Compliance or Quality Management Systems** often have templates for Policy or SOPs built into them, or give you a few boxes to type content into. Again, this approach is limiting, tied to a single use.
ZAVANTA FEATURES CHECKLIST

Create / Capture

Zavanta's unique **Content Overlay** is a fill in the blanks, configurable authoring wizard for any type of content; it helps authors "think through" what their policy or procedure actually is.

**Content Overlay Designer** lets you customize the authoring wizards. Add text fields, list fields, date fields. Create special screens, re-order screens. Add help to the screens, set entry rules, starter text, and more

Built-in **writing advice**, onscreen tips to authors

Drag and drop **step engine**

**Required fields**

**Standardized Pick Lists** ensure standardized terminology and speed up development

Insert **Pictures, videos, forms and links** to related documents and other web-based applications

**Roles-based permissions** to show entry screens, fields, and application features

Set **system standards** for lead in text, revision numbering, application branding, and more

Create unlimited content types: Policies, FAQs, Guidelines, Company Dictionary, and more

Easy **cross-reference linking**

Content Management

**Database design** breaks content up into modules, making it easier to search, update, understand, and re-use.

Data **filtering and reporting**: access and report by department, process, job title, location, regulation -- any category or query you want

Life cycle **Status Codes**

**Versioning, Archival, Roll-back**

**Mass Update** lets you change content across multiple documents at once

**Review / Approval** workflow, email notification, easy Reviewer commenting and markup

**Control Central Dashboard** for easy monitoring of review and approval activity

**Track Changes**

**Document Audit Trail** shows all the changes, markup, commenting and employee acknowledgement history

**Document Compare**

Zavanta supports single sign-on, MS SharePoint API

Share & Use

**Automatic formatting** for Print, MS Word, PDF, Online Portal

**Employee Attestation** (Read Verify) with exception and history reporting

Auto-generates an **Employee Portal** that can be accessed from any device, complete with a Home Page, Index (Category) pages and search engine. Everything is turn-key, no IT needed.

**Drill-down presentation**. High-level Processes are linked to Policies, Procedures, and tasks.

**In-document navigation** makes it easy for readers to jump to a section without scrolling.

Confidential information on employee portal can be controlled by **security**

Drag and drop **Design tools** for printed reports, portal themes

**SUPPORT & COACHING**

All plans include unlimited phone and email support, as well as Coaching/Onboarding.

**Operations Mapping Methodology.**

Unique to Zavanta, you’ll learn our proven process that was developed over the years of working with hundreds of organizations. Your Coach can step you through our Operations Mapping methodology, help you decide what procedures and policies you need, and even review your content to make sure you’re on the right track.
Zavanta's unique drill-down presentation let's users get the big picture and drill down to the details. You can take any process and walk someone through it from start to finish, cradle to grave.

SUMMARY

ZAVANTA is a good fit if these are your key requirements:

Content quality, standardization, and usability is a priority. If you want to avoid pitfalls starting out or ... get rid of your existing mess once and for all! You need an end product the people will USE and that will further your business goals, not detract from them.

You want to reduce the burden your SMEs / authors. Give them built in help. Eliminate the time they spend on clerical tasks.

You want to tame the "maintenance" monster once and for all.

You want a long term solution that you can LEVERAGE for multiple uses; a system with no restrictions, that is easily customized and can be used for various content types (Process, Policy, FAQs, Bulletins, Company Dictionary, Job Descriptions) that are linked together. Employees have ALL the information and quick reference aids they need.

You need to produce a variety of outputs (print, online, files).

You want to give your employees an engaging, searchable Portal they can log into with features like security and Attestation. And, it needs to be out-of-the-box, generated without IT.

You want a complete solution; one that automates all phases including reviews.

You need a system that is compatible with other applications such as MS SharePoint, Learning Management Systems (LMS), DMS / CMS, and more

You want to work with recognized experts in this field. You need help beyond software: proven formula for getting started, creating a solid framework, advice backed up by years of experience.

You want a solution that is proven, with customers who have been users for years, backed by a reputable company that has been in business since 1987.