Zavanta
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SECTION 1
INTRODUCTION

Zavanta automates the capture of best practices and "how to" knowledge directly from subject matter experts, and provides web distribution of this information to your workforce. You can build an operations knowledgebase for a workgroup, a department, or your entire organization.

A. Advantages of Zavanta

- Streamlines operations by letting you "systemize" your business
- Improves morale and productivity
- Improves team and department performance
- Gives management better visibility as to "what’s going on" so that they can make better Decisions, prevents intellectual assets from leaving the organization.

B. Zavanta is user friendly

Basic users need to be familiar only with basic content creation tasks. They do not have to be familiar with setup or data management functions. The learning curve you should expect for first-time user is about 20 minutes.

C. A Basic user needs to know

- Content type definitions
- Naming and number conventions
- Open existing documents
- Complete fields and move from screen to screen
- Save content
- Make minor and major revisions
- View content on the web
- Store attachments associated with content
- Print, print preview, and export
SECTION 2
SETTINGS AND USAGE

A. Content Types

Policy: WHY – A management decision; the organization’s official position. Example: Evergreen Policy.

Process: A series of interrelated activities that result in an outcome; made up of several procedures. Example: Using Banner for non-credit TLC courses.

Procedure: HOW – Tells employees how to do something. Examples: handling an incoming call or opening a new staff account.

Work Instruction: Assumes one person or job completes the task from start to finish; usually unit-contained or job-specific. Example: How to reset a PIN number.

B. Numbering Scheme

All Information Services contents will have the prefix of 150. Please look at existing contents when assigning numbers.

<table>
<thead>
<tr>
<th>Information Services</th>
<th>150</th>
</tr>
</thead>
<tbody>
<tr>
<td>IS Policy</td>
<td>150.PXX</td>
</tr>
<tr>
<td>Must have assistant director SIGN OFF</td>
<td></td>
</tr>
<tr>
<td>IS Process</td>
<td>150.aa</td>
</tr>
<tr>
<td>IS Procedure</td>
<td>150.aa.bb</td>
</tr>
<tr>
<td>IS Work Instruction</td>
<td>150.aa.bb.cc</td>
</tr>
<tr>
<td>Job descriptions</td>
<td>150.Jxx</td>
</tr>
<tr>
<td>Risk</td>
<td>150.Rxx</td>
</tr>
<tr>
<td>Risk Mitigation</td>
<td>150.Rxx.Axx</td>
</tr>
</tbody>
</table>

C. Naming Conventions

Content names should be brief and meaningful and should include a keyword reference to the subject being named; however, do not include the content type in the document name. Example: ‘Evergreen computer replacement’ NOT ‘Evergreen computer replacement Process’
D. Content Attachments

All attachments should be stored in common folder T:/compserv/Zavanta. All Information Service areas should store content attachments in one of the sub-folders defined and should use a meaningful name for the content.

E. Zavanta User Roles

<table>
<thead>
<tr>
<th>User Role</th>
<th>Functions Defined for Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Administrator</td>
<td>• Maintain set up preferences and organizational standards&lt;br&gt;• Create and update filters&lt;br&gt;• Add and maintain users.&lt;br&gt;• Define security preferences&lt;br&gt;• Create and maintain pick lists&lt;br&gt;• Publish to the web</td>
</tr>
<tr>
<td>Owner/Manager</td>
<td>• Create and update content&lt;br&gt;• Update filters (except Standard Filters – see Filters below)&lt;br&gt;• Start New Revisions&lt;br&gt;• Update content status&lt;br&gt;• Update content owner&lt;br&gt;• Update Signoff approvals</td>
</tr>
<tr>
<td>Subject Expert</td>
<td>• Edit content except:&lt;br&gt;• Content status&lt;br&gt;• Content owner&lt;br&gt;• Signoff approvals&lt;br&gt;• Update filters (except Standard Filters)</td>
</tr>
</tbody>
</table>
SECTION 3
ADD NEW CONTENT

A. Create a new content

1. Click on Add New Content link on the Options menu
   OR, Select File, New

   ![Add New Content Interface]

2. Click on a content type icon
3. Select Create.

4. Complete the content screens in any order you want (if you are a first-time user, we suggest completing the screens in sequence).
5. Select Save when finished

Note: A new document will not be added to the database until you save it the first time.
B. Navigation Tips

1. Skip fields that don’t apply with the exception of document number and name.
2. The red checkmarks in the outline pane show you the fields that contain information already. Moving from screen to screen can be accomplished using the Outline Pane.

![Outline Pane](image)

2. Some fields require data from a Pick List
3. Some user roles may add to Pick Lists if necessary
4. Prompts will appear for mandatory fields upon saving. Required fields appear bold. These fields include: document owner and sign off approvals.

![Prompt](image)

5. Categories can be used for grouping related documents. Example: Create a category ‘Evergreen’ and assign the category to all documents relating to that subject area. You can then filter/search for contents based on category.

![Categories](image)

6. Click on the forward arrow button to go to the next screen. To go back a screen, click on the back arrow button in upper right
7. If a screen is larger than what is displayed on the monitor, use the vertical scroll bar to view the rest of the screen and information.
8. If you want to expand a text field, press Ctrl+F or press OR the Show Expand button. Keep entries short and concise where possible.
9. Enter a unique name and number. You will not be able to leave a document until you have completed these fields.
C. Document Name and Number

1. In an open content, go to the ID Information screen.
2. Complete the Document Name and Document Number fields.
   If you want to view a list of existing names or numbers press the View Existing button.

<table>
<thead>
<tr>
<th>Information Services</th>
<th>150</th>
</tr>
</thead>
<tbody>
<tr>
<td>IS Policy</td>
<td>150.PXX</td>
</tr>
<tr>
<td>IS Process</td>
<td>150.aa</td>
</tr>
<tr>
<td>IS Procedure</td>
<td>150.aa.bb</td>
</tr>
<tr>
<td>IS Work Instruction</td>
<td>150.aa.bb.cc</td>
</tr>
<tr>
<td>Job descriptions</td>
<td>150.Jxx</td>
</tr>
<tr>
<td>Risk</td>
<td>150.Rxx</td>
</tr>
<tr>
<td>Risk Mitigation</td>
<td>150.Rxx.Axx</td>
</tr>
</tbody>
</table>

Note: The View Existing list shows only documents for the type you are creating. If you want to see a list of all the documents in your database, check the "Show documents for all overlays" checkbox. This setting is at the bottom of the screen.
D. Attachments

1. Within open content, go to the Attachments screen. It is available from the outline window.
2. Select Add New button.
3. A pop-up screen will ask for attachment name.
4. Type the title or description of the attachment. Press OK.
6. Insert Picture or Insert Object properties dialog displays.
7. Defaults settings are fine for most occasions
8. Select Insert button and attachment title displays on the list.
9. Repeat steps 1-5 to add all of your attachments.

Note: All attachments should be stored in T:/compserv/Zavanta. All Information Service areas sub folders. Please use a meaningful name for the document

E. Categories

Categories is located in the content outline. It consists of Department, Categories, and distribution. Categories can be used to group related documents. Example: Add your department to all department documents. You can then filter/search for documents based on category. Users should contact the System Administrator to have a new category added.

F. Status Tracking

The Status Field helps track content. There is no automation to status tracking and it must be selected by the user. There are 4 types of status codes to choose from:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Development</td>
<td>A draft state while composing the document. All new documents saved will default with this status.</td>
</tr>
<tr>
<td>In Review</td>
<td>A document that is finished and waiting for approval.</td>
</tr>
<tr>
<td>Approved</td>
<td>A document that has been approved and may be published to the web.</td>
</tr>
<tr>
<td>Archived</td>
<td>Content that is no longer active, but kept for reference purposes.</td>
</tr>
</tbody>
</table>
G. Saving Documents

When saving a document for the first time Zavanta will display the number/name, today’s date, status ‘In Development’ and as V1.1. If saving already created documents please follow Section 6 Revisions.

1. Click on File, Save or press Ctrl+S.
2. If saving an existing document Zavanta tracks:
   - Date of Last Update (always shows today’s date)
   - Status by default is In Development but may be changed
   - Update Revision Log (See Revision Section 6)

3. Update the tracking information as needed. If you have permission to change the status field or add records to Revision History you can do so here.

Note: Zavanta does not save content as a physical "document" or file but a "document" is really a database record. When you use Save As you create a duplicate of the current document and store it under a new name and number.
A. **Select Document**

1. Click on Open Content on the Options menu  
   OR, Select File, Open  
   When a document is open, it cannot be accessed by any other user.

2. All documents in your database will display in a Select Document window.  
   a) Sort list by double-clicking on any column heading.  
   b) This sort order stays in effect until you change it or exit.

3. Double-click on the document you want, or highlight it and press the Open button.

B. **File Menu**

Zavanta also provides a convenient way to quickly open a recently accessed document.

1. Select File.  
2. Click on the document name. The last three documents opened will be displayed at the bottom of the file menu.

C. **Close Document**

1. Select File, Close OR Ctrl+W
D. Troubleshooting

You cannot open a document if:

- another user has it open. A red checkmark is shown next to documents that are currently open by another user.
- the document is checked out. A blue checkmark displays next to documents that are checked out.
- the document’s Content Overlay is being edited.
- the document you are trying to open has a password assigned to it. You must enter the password correctly before you can access the document.
- your user id has a filter associated with it. The only documents you will see will be those that meet the filter condition.
SECTION 5
FILTERS

By using filter definitions you can search and retrieve detailed knowledgebase content in a variety of ways.

You can create a filter definition to use one time or can save it in the Filter Library for all Zavanata users to use. If you do not save your filter definition, Zavanta automatically names the filter [Session Filter]. A Session Filter remains in place until you create another session filter, clear the filter, or select a stored filter from the library.

A. Active Filter

1. Click on Open Content on the Options menu or select File, Open
2. In the Select Document window, click on the drop down box below Active Filter.
3. Select a pre-determined filter from the list.
4. Filtered items will appear in grid.
5. Select [NONE] to display all documents and clear filter.

B. Creating a Set filter

1. Select File, Open OR Open Content from Options Menu
2. Press the Set Filter icon. From the Select Document window.
3. In the Define Filter screen:
   a) Select a field to search Ex. Category
   b) Select an Operation Ex. =EQUALS
   c) Select a Value Ex. TLC
   d) Select add to list
   e) Repeat a-d to add more conditions
   f) Select Next to open Relationship window
   g) To change the parameter from AND to OR, highlight the word AND and use the AND/OR button to toggle between the two words
   h) Select OK
4. Click OK
5. The filter will save as [Session Filter]
6. Select Clear Filter to original state
SECTION 6
REVISIONS AND VERSION NUMBERS

To ensure data integrity and guard against data loss, each time a document revision occurs it will apply a version number. A version number will be designated in the following format: ‘VA.B’ where ‘A’ is a major revision number and ‘B’ is a minor revision. Example 150.12 V2.3. Where ‘2’ equals the second major revision and ‘1’ equals the third minor revision. Updating a contributing author would be minor, while revamping the steps for the Evergreen deployment would be major.

A. Minor Revisions (AFTER)

1. Open Document to make the Minor Revision
2. Make minor changes to document
3. Select File, Save
4. In the Save pop up box select the ‘Update Revisions Log…’ button
5. In the Revision Log box, select the plus icon to add minor revision.

6. Under Status Tracking, Revision Log the new Revision Number will be displayed along with your username.
7. Enter Nature of Change and OK

8. In the Save box, select Close
9. Change the Status of the Document if necessary and OK

Note: When revising you will be prompted to update the revision information and enter a comment explaining the change. The auto-numbering will automatically assign a new minor revision number – do not change the number.
B. Major Revisions (BEFORE)

1. Open Document
2. Select Tools, Start New Revision
3. In the Start New Revision box:
   a) In Baseline Document uncheck Clear Sign-off Approvals
   b) In Previous Saved document checkmark Change Status
   c) Select Archived from the drop down menu
   d) Select OK
4. Update document as needed.
5. File, Save
6. Note the New Major Revision number in the Current Document area.
SECTION 7
APPROVALS & STATUS

The Approvals and Status are NOT automated. Each area will have its own workflow and is responsible for these areas.

A. Status Field

The Status Field helps track content. User must fill in the Status Field. All new documents will be saved with a default of In Development.

<table>
<thead>
<tr>
<th>Status Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Development</td>
<td>A draft state while composing the document. All new documents saved will default with this status.</td>
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</tr>
<tr>
<td>Approved</td>
<td>A document that has been approved and may be published to the web.</td>
</tr>
<tr>
<td>Archived</td>
<td>Content that is no longer active, but kept for reference purposes.</td>
</tr>
<tr>
<td>Obsolete</td>
<td>DO NOT USE</td>
</tr>
</tbody>
</table>

B. Approval Process

Owner/Managers have the ability to approve documents. Each area will differ in workflow. Please see Appendix B. for suggested practice.
SECTION 8
PREVIEW & PRINTING

At any time you can quickly preview how the open document will look when it is printed or exported to a PDF file.

A. Preview and Print

1. Open the document that you want to preview
2. Select File, Print Preview or use Print Preview button
3. (Optional) Select the sections you want to include
4. (Optional) Change the page orientation
5. (Optional) Select overall formatting options
6. Zavanta will automatically apply all the settings from the standard document report and display in the preview window
7. Select Print within the preview window

B. Batch Print

1. Select File, Print Multiple Documents
2. Checkmark documents to print and select OK
   OR to print all documents based on a filter condition, select the filter and then press the Select All button and OK
3. Select Yes to prompt stating ‘Do you want to use the default print settings for each document.
4. If No, Zavanta will prompt you to select sections for each document.

Notes: Documents that are open by other users or are currently checked out will not print
SECTION 9
WEBSITE

Currently, only the Zavanta Administrator can publish content to the web.

A. Web Location

1. www.uregina.ca/zavanta
2. The Information Services website has 3 areas: Procedure Library, Policy Library and Subindexes
3. This website will change as the project advances. Currently all content is displayed on web regardless of the status. In the future, only documents with the ‘Approved’ status will be displayed.

B. Web Preview

1. While in an open document
2. Select File, Web Preview
   OR
   Web Preview button on the toolbar
3. Select the Web Output Settings. Choose which sections you would like to display
4. Select OK

- General Description
- Contributing Authors
- Process Steps or Stages
- Records and Notes
- Attachments
- Related Documents
- Authorization History
- Distribution / Routing List
- Sign-Off Approvals
- Revision History
# APPENDIX A
## BASIC USER QUICK KEYS

### A. Navigation Quick Keys

<table>
<thead>
<tr>
<th>File Menu</th>
<th>Edit Menu</th>
<th>Insert Menu</th>
<th>Tools Menu</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a new document</td>
<td>Undo</td>
<td>Cross Reference Link</td>
<td>Spell check document</td>
</tr>
<tr>
<td>Ctrl+N</td>
<td>Ctrl+Z</td>
<td>Ctrl+R</td>
<td>F7</td>
</tr>
<tr>
<td>Open a document</td>
<td>Redo</td>
<td>Bold</td>
<td>Start cropping</td>
</tr>
<tr>
<td>Ctrl+O</td>
<td>Ctrl+Y</td>
<td>Ctrl+B</td>
<td>Ctrl+I</td>
</tr>
<tr>
<td>Close a document</td>
<td>Cut</td>
<td>Italics</td>
<td>Resize</td>
</tr>
<tr>
<td>Ctrl+W</td>
<td>Ctrl+X</td>
<td>Ctrl+I</td>
<td>Ctrl+R</td>
</tr>
<tr>
<td>Save the current document</td>
<td>Copy</td>
<td>Underline</td>
<td>Document screen navigation</td>
</tr>
<tr>
<td>Ctrl+S</td>
<td>Paste</td>
<td></td>
<td>Moves next field</td>
</tr>
<tr>
<td>Print the current document</td>
<td>Select All</td>
<td></td>
<td>Moves to previous field</td>
</tr>
<tr>
<td>Ctrl+P</td>
<td>Search and Replace</td>
<td></td>
<td>Advances one screen</td>
</tr>
<tr>
<td>Exit</td>
<td>Expand field to full screen</td>
<td></td>
<td>Moves back a screen</td>
</tr>
<tr>
<td>Alt+F4</td>
<td></td>
<td></td>
<td>Turn outline on/off</td>
</tr>
</tbody>
</table>

### Document screen navigation
- Moves next field: Ctrl+Tab
- Moves to previous field: Shift+Tab
- Advances one screen: F2
- Moves back a screen: F3
- Turn outline on/off: Ctrl+F2

### Print Preview Zoom
- Right mouse click increases page view size
- Left mouse click decreases page view size

### List Navigation
- You can jump to an item by typing the first few letters of the item name. For example, type the letter H to jump to the first item that begins with H. Type additional letters to narrow the search.

### Multiple Selections
- You can select several items on lists by using the Shift and Ctrl keys with your mouse.

**Note:** Right Mouse Click  Throughout the Zavanta system, you can right mouse click to activate commonly used program functions. For example, if you position your cursor in a text field, a right mouse click will display common operations that can be performed in a text field such as cut, copy, paste, and insert.
APPENDIX B – SUGGESTED APPROVALS WORKFLOW

Information Services - Workflow for Review and Approval of Zavanta Documents

Staff Member

- Identify new/changed document
- Create/modify diagram or documentation
- Forward to Document Owner for review

Manager *

- Review with staff member
- Correct and accurate?
  - No
  - If existing document, determine if this is a Major Revision
    - Assign Document Coordinator and forward document details
  - Yes

Document Coordinator **

- Receive document details
- Major Revision?
  - No
  - Create new document/modify existing document in Zavanta
  - Assign Document Coordinator and forward document details
  - Set document status to In Development
  - Upon completion of new draft/update:
    - Create new minor Revision and record reason for update (if updating an existing document)
    - Set document status to In Review
  - Yes
    - Open existing document in Zavanta and select option Start New Revision ***
    - Set document status to In Development
    - Upon completion of new draft/update:
      - Create new minor Revision and record reason for update (if updating an existing document)
      - Set document status to In Review

Members of Signoff Group

- Receive note to Signoff persons for document review
- Send comments to Document Coordinator
- Review comments and review with Manager (schedule meeting with signoff group if needed)
- Make final changes to document; set document status to Approved
- Publish new/changed document
- Send communication to Signoff Group members
- Receive notification of new/changed document

Notes

* Manager - Document Owner as defined in Zavanta
** Document Coordinator - Staff member with Owner/Manager permission for Zavanta
*** When starting a new Revision, set status of old document to Archived

Last Updated 10 Apr, 2007
APPENDIX C
BASICS OF WRITING POLICY AND PROCEDURES

A. Using the Active Voice

The active voice is preferable to the passive voice in almost all instances. Use of the passive voice can cause readers to lose interest or become confused.

<table>
<thead>
<tr>
<th>Passive</th>
<th>Active</th>
</tr>
</thead>
<tbody>
<tr>
<td>The girl was bit by a snake.</td>
<td>A snake bit the girl.</td>
</tr>
<tr>
<td>The machine has been damaged.</td>
<td>The machine is damaged.</td>
</tr>
<tr>
<td>Staff assignments are made by the manager.</td>
<td>The manager makes staff assignments.</td>
</tr>
<tr>
<td>Action on the policy is being considered.</td>
<td>Management is considering action.</td>
</tr>
</tbody>
</table>

B. Avoid

- Was
- Were
- Have
- Has
- Have been
- Has been

C. Sentence Length

8 words equal 100% comprehension
15 words equal 90% comprehension
28 words equal 50% comprehension

D. Action Verb List

Below are action verbs that will help write in the active voice.

Accept, Aid, Approve, Ask, Assist, Charge, Check, Claim, Correct, Compile, Conserve, Control, Create, Decide, Delete, Deliver, Describe, Determine, Develop, Distribute, Encourage, Enforce, Evaluate, Explain, Follow-up, Forward, Further, Gather, Give, Initiate, Inspect, Insure, Maintain, Make Available, Measure, Obtain, Operate, Originate, Participate, pay, Plan, Procure, Protect, Prove, Provide, Purchase, Reject, Release, Report, Request, restrict, Review, schedule, Serve, Start, Submit, Terminate, Transfer, Verify, and Withdraw.