

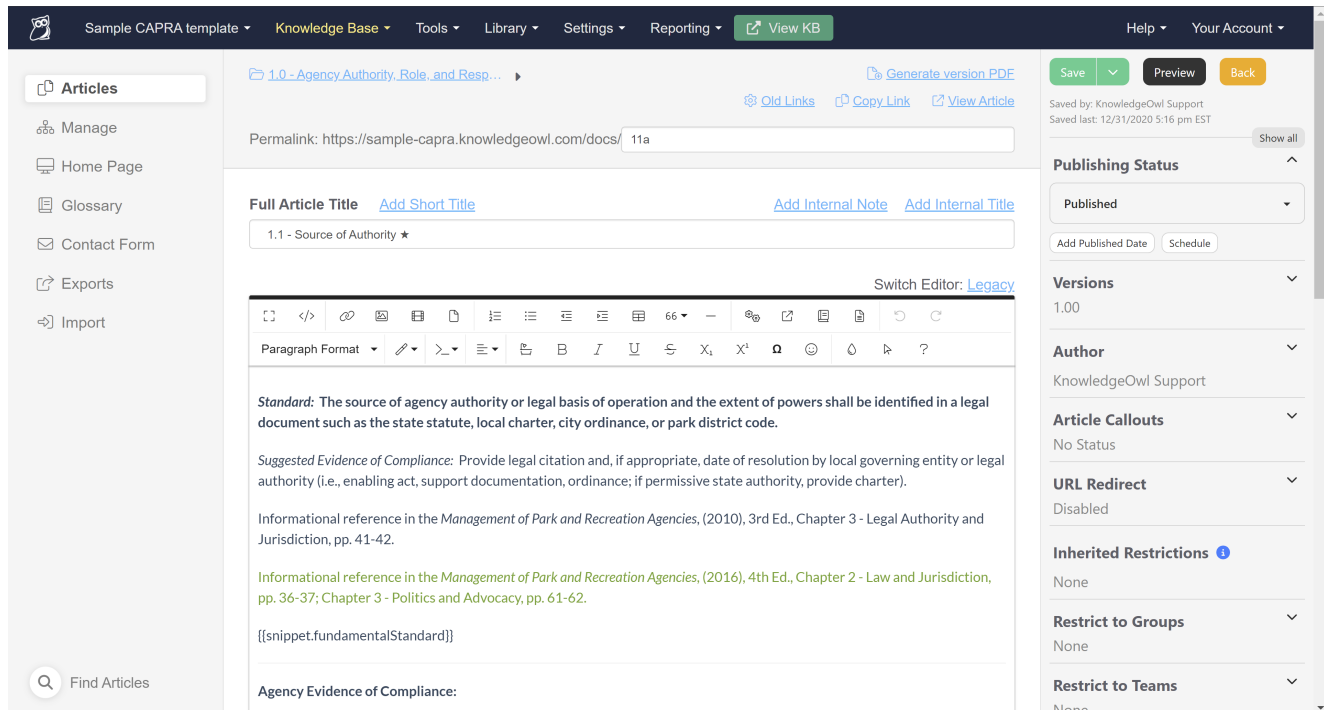
# The basics: editing standards

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You can access standards to edit them in three ways:

- Navigate in the **Articles** hierarchy and click on the standard you want to edit
- Search for the standard using the **Find Articles** search in the lower left of most app pages
- Use one of the filters combined with search in the **Manage** interface

Either way, once you click on the standard, it will open in an editor screen like this:



The screenshot shows the KnowledgeOwl editor interface. The top navigation bar includes 'Sample CAPRA template', 'Knowledge Base', 'Tools', 'Library', 'Settings', 'Reporting', and 'View KB'. The left sidebar contains 'Articles', 'Manage', 'Home Page', 'Glossary', 'Contact Form', 'Exports', and 'Import'. The main editor area displays the title '1.1 - Source of Authority' and a rich text editor with a toolbar. The content includes a standard text, suggested evidence of compliance, and informational references. The right sidebar shows publishing status, versions, author, article callouts, URL redirect, inherited restrictions, and restrict to groups/teams.

As a general rule of thumb, you won't want to touch anything in the editor above the **Agency Evidence of Compliance** section. (The one exception to this is if you're updating the standard itself because NRPA released new standards.) But for all other edits, ignore the Permalink, the Full Article Title, and within the editor itself, skip the Standard, Suggested Evidence of Compliance, and the Informational reference[s].

Some standards will include that `snippet.fundamentalStandard` section--this snippet code is added to standards that are considered fundamental/required--it just tells the knowledge base to display the standard title in red. You can safely ignore this now, too.

## Required sections

## You should focus on three sections in the editor body, plus the Publishing Status:

The screenshot shows the KnowledgeOwl editor interface. The top navigation bar includes 'Sample CAPRA template', 'Knowledge Base', 'Tools', 'Library', 'Settings', 'Reporting', and 'View KB'. The left sidebar contains navigation options like 'Articles', 'Manage', 'Home Page', 'Glossary', 'Contact Form', 'Exports', and 'Import'. The main editor area displays a document titled '1.1 - Source of Authority' with a rich text editor. The editor content includes a 'Standard' section, a 'Suggested Evidence of Compliance' section, and an 'Informational reference' section. The right-hand sidebar contains a 'Publishing Status' section with a 'Needs Review' dropdown, and several other settings sections like 'Versions', 'Author', 'Article Callouts', 'URL Redirect', 'Inherited Restrictions', 'Restrict to Groups', 'Restrict to Teams', 'Category', 'Related Articles', 'Reuse Flags', 'Display Settings', and 'Recommend On Pages'.

- 1. Agency Evidence of Compliance:** Provide evidence of your compliance to this standard. Most often, this includes narrative.
- 2. Documentation of Evidence:** Provide links to documentation that supports your evidence of compliance. This can include files you've uploaded to KnowledgeOwl directly (see [The basics: adding documents, files, and more](#)), as well as links to pages on your website (see [The basics: adding links to other websites or online resources](#)).
- 3. Agency Self Assessment:** Here, indicate whether you have assessed that this standard is Met or Unmet.
- 4. Publishing Status:** Once you have fully reviewed/updated this standard and you consider it "complete" and ready for review, change the publishing status to Published.

## Standard text formatting tips

As of January 2021, the NRPA Portal does not support bulleted or numbered lists in their editor. Copying and pasting these lists into the Portal will just create new paragraphs.

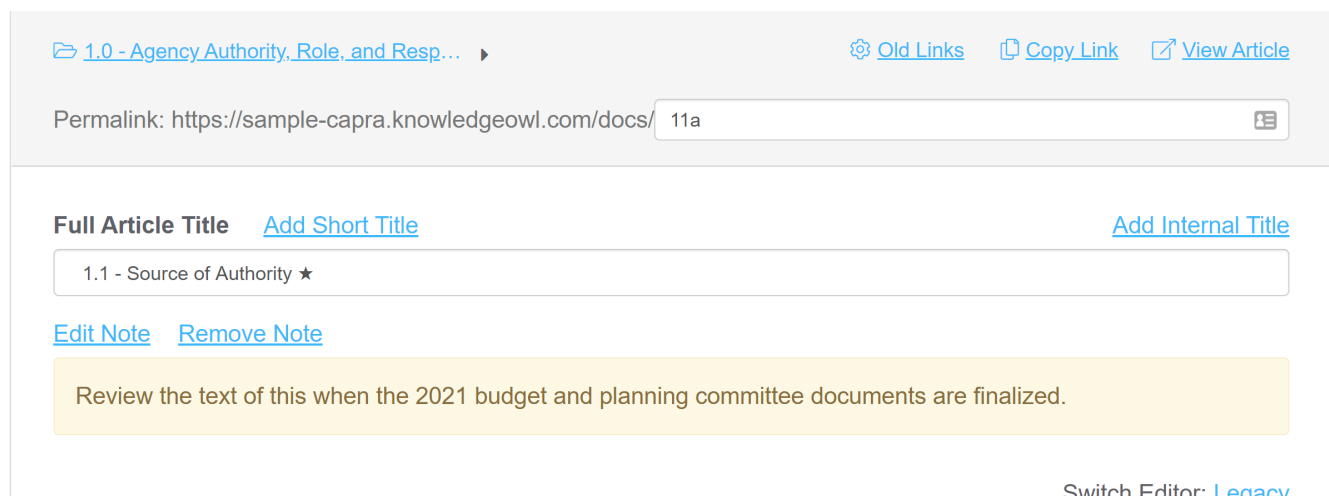
The Portal editor does not properly paste in superscript and subscript text from KnowledgeOwl. You're welcome to still use these format types, but recognize that you may have to do additional formatting on them within the Portal editor.

## Optional/helpful sections

There are a couple editor tricks that may be useful in your workflow, so we wanted to point them out!

### Internal note

The Internal Note field in KnowledgeOwl gives you a way to add a note that is displayed between the Full Article Title and the editor. This note is only visible to authors within KnowledgeOwl (it is never shown in the knowledge base itself). It can be a great field to use for notes on what still needs to be updated or reviewed in the standard.



The screenshot shows the KnowledgeOwl editor interface. At the top, there is a breadcrumb trail: [1.0 - Agency Authority, Role, and Resp...](#). To the right are links for [Old Links](#), [Copy Link](#), and [View Article](#). Below this is a permalink field: `https://sample-capra.knowledgeowl.com/docs/11a`. The main editing area has a **Full Article Title** field containing "1.1 - Source of Authority ★", with links for [Add Short Title](#) and [Add Internal Title](#). Below the title field are [Edit Note](#) and [Remove Note](#) links. A yellow highlighted box contains the text: "Review the text of this when the 2021 budget and planning committee documents are finalized." At the bottom right, there is a "Switch Editor: [Legacy](#)" option.

See our general [Internal note](#) documentation for more information on using this feature.

### View Article link

If you're curious how a standard will display, or if you need to grab the URL of a standard to include it in the Additional Documents Link section of a chapter, click the **View Article** link near the top navigation. This basically does the same thing as View KB + navigating to the standard you were looking at. It can be a great time saver for "seeing" how the standard looks or grabbing the URL to paste somewhere else.

Sample CAPRA template Knowledge Base Tools Library Settings Reporting View KB

Articles

- Manage
- Home Page
- Glossary
- Contact Form
- Exports
- Import

1.0 - Agency Authority, Role, and Resp... Generate version PDF

Old Links Copy Link View Article

Permalink: https://sample-capra.knowledgeowl.com/docs/11a

Full Article Title Add Short Title Add Internal Note Add Internal Title

1.1 - Source of Authority ★

Switch Editor: Legacy

## Tags

Tags are an optional metadata field available at the bottom of the editor. We've found them useful for CAPRA self-assessments in two ways:

- If you have multiple people working to update standards, and you're using a shared account, create a tag for each person who's working in the app. Add the tag with their name on it to indicate which person is responsible for a given standard.
- If a standard cannot be completed until certain processes or documents are completed, create a tag for the process or document, and add it to the standards.

With tags in place, you can create custom filters in **Knowledge Base > Manage** to pull a list of standards with each tag, making it easy to divide up the remaining work or update all standards that were waiting on something else at once. See our CAPRA-specific documentation on [Using tags to track more detailed progress](#) and general documentation on [Creating a custom Manage filter](#) for more information on these workflows!