



Tracking your self-assessment progress

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See the ways KnowledgeOwl can help you track completion of your self-assessment.

Tracking complete/incomplete standards

When your CAPRA self-assessment knowledge base was created, all of the standards in it were set to a "Needs Review" publishing status.

As we've mentioned, we recommend changing the publishing status of a standard to "Published" once you consider it "finished." This will help you keep track of which standards are complete and which still need your review.

You can see the standards that you have remaining in two places: using the article call-outs on the Articles page, and using filters in the Manage page. Let's look at each more closely:

Articles page

On the Articles page, any standard with a Needs Review status has a purple Needs Review callout next to the title.

For example, here I can see that most of Chapter 1 is complete, but I still need to finish standards 1.6, 1.6.1, 1.7, and 1.7.1:

Sample CAPRA template Knowledge Base Library Settings Reporting View KB Help Your Account

Articles

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

Top Level Content [Add Category](#) [Add Article](#)

- Introduction
- 1.0 - Agency Authority, Role, and Responsibility**
- 2.0 - Planning
- 3.0 - Organization and Administration
- 4.0 - Human Resources
- 5.0 - Financial Management
- 6.0 - Programs and Services Management
- 7.0 - Facility and Land Use Management
- 8.0 - Public Safety, Law Enforcement, and Security
- 9.0 - Risk Management
- 10.0 - Evaluation, Assessment, and Research
- ## - New Standard Template ★ DRAFT
- SAMPLE STANDARD - 1.1.1 - Approving Authority/Poli... NEEDS REVIEW
- SAMPLE STANDARD - 3.2.1 - Support Services NEEDS REVIEW


[+ Add Category](#) [+ Add Article](#)


Find Articles

1.0 - Agency Authority, Role, and ... [Add Category](#) [Add Article](#)

- 1.1 - Source of Authority ★
- 1.1.1 - Approving Authority/Policy Body
- 1.1.2 - Citizen Advisory Boards/Committees
- 1.2 - Periodic Timetable for Review of Documents
- 1.2.1 - Document Approval Authority
- 1.3 - Jurisdiction
- 1.4 - Mission ★
- 1.4.1 - Agency Goals and Objectives ★
- 1.4.2 - Personnel Involvement
- 1.5 - Vision ★
- 1.6 - Policies, Rules, Regulations, and Operational Pro... NEEDS REVIEW
- 1.6.1 - Administrative Policies and Procedures ★ NEEDS REVIEW
- 1.7 - Agency Relationships ★ NEEDS REVIEW
- 1.7.1 - Operational Coordination and Cooperation Agre... NEEDS REVIEW

[+ Add Sub-Category](#) [+ Add Article](#)

 **Pros:** This can be a great view to get a feel for how complete a certain chapter is.

 **Cons:** This doesn't provide a count or let you see across all chapters at once.

Manage articles page

On the Knowledge Base > Manage page, you can use the Needs Review filter to get a complete list of all standards with a Needs Review status:

Sample CAPRA template Knowledge Base Library Settings Reporting View KB Help Your Account

Articles Manage Home Page Glossary Contact Form Exports Import Find Articles

Manage Articles


Needs Review Standard All Non Deleted Published Draft Rejected Draft Ready to Publish Needs Review Deleted Out of Date Custom


Create New Filter

Search for articles...

Articles per page: 20 50 100

Status	Visibility	Author	Last Modified	Date Created
NEEDS REVIEW	👁	KnowledgeOwl Support	12/28/2020 2:25 pm	12/28/2020 2:25 pm
NEEDS REVIEW	👁	KnowledgeOwl Support	12/28/2020 2:25 pm	12/28/2020 2:25 pm
NEEDS REVIEW	👁	KnowledgeOwl Support	12/28/2020 2:25 pm	12/28/2020 2:25 pm
NEEDS REVIEW	👁	KnowledgeOwl Support	12/28/2020 2:25 pm	12/28/2020 2:25 pm
NEEDS REVIEW	👁	KnowledgeOwl Support	12/28/2020 2:26 pm	12/28/2020 2:26 pm
NEEDS REVIEW	👁	KnowledgeOwl Support	12/28/2020 2:26 pm	12/28/2020 2:26 pm
NEEDS REVIEW	👁	KnowledgeOwl Support	12/28/2020 2:26 pm	12/28/2020 2:26 pm
NEEDS REVIEW	👁	KnowledgeOwl Support	12/28/2020 2:26 pm	12/28/2020 2:26 pm
NEEDS REVIEW	👁	KnowledgeOwl Support	12/28/2020 2:26 pm	12/28/2020 2:26 pm
NEEDS REVIEW	👁	KnowledgeOwl Support	12/28/2020 2:26 pm	12/28/2020 2:26 pm
NEEDS REVIEW	👁	KnowledgeOwl Support	12/28/2020 2:26 pm	12/28/2020 2:26 pm
NEEDS REVIEW	👁	KnowledgeOwl Support	12/28/2020 2:26 pm	12/28/2020 2:26 pm
NEEDS REVIEW	👁	KnowledgeOwl Support	12/28/2020 2:26 pm	12/28/2020 2:26 pm
NEEDS REVIEW	👁	KnowledgeOwl Support	12/28/2020 2:26 pm	12/28/2020 2:26 pm

 **Pros:** This filter looks across all chapters. It will give you a complete count of remaining standards at the bottom of the page. You can also export this list to Excel using the **Export Articles to CSV** option, in case you want to track that information somewhere else.

 **Cons:** There is no way to filter this to a specific chapter, though you can sort by **Article Name**.

Alternative workflow: Draft rather than Needs Review

When your CAPRA self-assessment knowledge base was created, all of the standards in it were set to a "Needs Review" publishing status. Our standard recommended workflow for our CAPRA customers is to then use the Published status to show when a standard is complete.

However, the Needs Review status will still show these in-progress standards on your knowledge base (visible when you click the **View KB** link in the top navigation or **View Article** link while editing any standard).

Some of our CAPRA customers prefer to have standards show in the knowledge base only once they are complete.

If you'd prefer to adopt this workflow, we recommend changing all standards to a "Draft" publishing status and then Publishing them when they are complete.

You can edit all of your existing standards from Needs Review to Draft status using these steps:

1. Go to Knowledge Base > Manage.

2. In the dropdown at the top, select Needs Review from the Standard filter options.

The screenshot shows the 'Manage Articles' interface. At the top, there is a navigation bar with 'Sample CAPRA template', 'Knowledge Base', 'Library', 'Settings', 'Reporting', and 'View KB'. Below this is a sidebar with 'Articles' and 'Manage' (selected). The main area has a 'Needs Review' filter dropdown open, showing options like 'Standard', 'All Non Deleted', 'Published', 'Draft', 'Rejected Draft', 'Ready to Publish', 'Deleted', 'Out of Date', and 'Custom'. A table of articles is visible below, with columns for 'Status', 'Visibility', 'Author', 'Last Modified', and 'Date Created'. The 'Status' column shows 'NEEDS REVIEW' for all articles.

3. Once the filter loads, click in the box to the left of the Article Name field to select all the standards on the screen:

The screenshot shows the 'Manage Articles' interface after the filter is applied. The 'Needs Review' filter is selected. The table of articles is now fully visible, and the 'Article Name' column has checkboxes next to each article name, all of which are checked. A blue arrow points to the first checkbox. The table columns are 'Article Name', 'Status', 'Visibility', 'Author', 'Last Modified', and 'Date Created'. The 'Status' column shows 'NEEDS REVIEW' for all articles.

4. You'll see an option to select all articles in filter (this will vary based on the number of standards displayed). Click on the link to select all xxx articles that match the current filter:

Sample CAPRA template Knowledge Base Library Settings Reporting View KB Help Your Account

Articles Manage Home Page Glossary Contact Form Exports Import

Manage Articles

Needs Review Create New Filter Search for articles...

Edit Bulk Edit Delete Export Articles to CSV Articles per page: 20 50 100

All 20 articles on this page selected. [Select all 148 articles that match the current filter](#)

Article Name	Status	Visibility	Author	Last Modified	Date Created
<input checked="" type="checkbox"/> SAMPLE STANDARD - 1.1.1 - Approving Auth...	NEEDS REVIEW		KnowledgeOwl Support	12/28/2020 2:25 pm	12/28/2020 2:25 pm
<input checked="" type="checkbox"/> SAMPLE STANDARD - 3.2.1 - Support Services	NEEDS REVIEW		KnowledgeOwl Support	12/28/2020 2:25 pm	12/28/2020 2:25 pm

5. The message will change to confirm you've selected all in filter. Click the **Bulk Edit** link between the filter dropdown and the Article Name:

Sample CAPRA template Knowledge Base Library Settings Reporting View KB Help Your Account

Articles Manage Home Page Glossary Contact Form Exports Import

Manage Articles

Needs Review Create New Filter Search for articles...

Edit Bulk Edit Delete Export Articles to CSV Articles per page: 20 50 100

All 148 articles that match the current filter selected. [Clear selection](#)

Article Name	Status	Visibility	Author	Last Modified	Date Created
<input checked="" type="checkbox"/> SAMPLE STANDARD - 1.1.1 - Approving Auth...	NEEDS REVIEW		KnowledgeOwl Support	12/28/2020 2:25 pm	12/28/2020 2:25 pm
<input checked="" type="checkbox"/> SAMPLE STANDARD - 3.2.1 - Support Services	NEEDS REVIEW		KnowledgeOwl Support	12/28/2020 2:25 pm	12/28/2020 2:25 pm
<input checked="" type="checkbox"/> Agency Overview	NEEDS REVIEW		KnowledgeOwl Support	12/28/2020 2:25 pm	12/28/2020 2:25 pm
<input checked="" type="checkbox"/> Self-Assessment Report Introduction	NEEDS REVIEW		KnowledgeOwl Support	12/28/2020 2:25 pm	12/28/2020 2:25 pm
<input checked="" type="checkbox"/> 1.6.1 - Administrative Policies and Procedures *	NEEDS REVIEW		KnowledgeOwl Support	12/28/2020 2:25 pm	12/28/2020 2:25 pm
<input checked="" type="checkbox"/> 1.6 - Policies, Rules, Regulations, and Operati...	NEEDS REVIEW		KnowledgeOwl Support	12/28/2020 2:25 pm	12/28/2020 2:25 pm
<input checked="" type="checkbox"/> 1.7.1 - Operational Coordination and Cooperat...	NEEDS REVIEW		KnowledgeOwl Support	12/28/2020 2:25 pm	12/28/2020 2:25 pm
<input checked="" type="checkbox"/> 1.7 - Agency Relationships *	NEEDS REVIEW		KnowledgeOwl Support	12/28/2020 2:25 pm	12/28/2020 2:25 pm
<input checked="" type="checkbox"/> 2.3.1 - Community Comprehensive Plan with P...	NEEDS REVIEW		KnowledgeOwl Support	12/28/2020 2:25 pm	12/28/2020 2:25 pm
<input checked="" type="checkbox"/> 2.5 - Strategic Plan *	NEEDS REVIEW		KnowledgeOwl Support	12/28/2020 2:25 pm	12/28/2020 2:25 pm
<input checked="" type="checkbox"/> 2.6 - Feasibility Studies	NEEDS REVIEW		KnowledgeOwl Support	12/28/2020 2:25 pm	12/28/2020 2:25 pm
<input checked="" type="checkbox"/> 2.4 - Park and Recreation System Master Plan *	NEEDS REVIEW		KnowledgeOwl Support	12/28/2020 2:25 pm	12/28/2020 2:25 pm

6. In the Bulk Edit Articles pop-up, under **Publishing Status**, select **Draft**.

7. Then click the **Update Articles** button.

Bulk Edit Articles X

Publishing Status:

Keep Current Status

Keep Current Status

Draft

Ready to Publish

Rejected Draft

Published

Needs Review

Archived

Deleted

Keep Current Status

No Status

NEW Article Status

UPDATED Article Status

Add Tags

Type tag name and hit enter or tab...

This is additive only. Tags will not be removed from articles.

Restrict to Groups:

Keep Current Restrictions

None

Add Options:

Exclude from search results

Hide from table of contents

Hide from landing page

Hide from article lists

Versions:

Activate next version marked ready for review

[Cancel](#) Update Articles

8. This will set all your Needs Review articles to have a Draft publishing status. The Bulk Edits take a bit of time, so you'll see a progress bar across the top, and a confirmation message once it's complete:

With these changes made, you can track the standards still needing work using the Manage "Draft" filter, and visually in the Articles page with the Draft callout.

You can also use two other unpublished statuses and their related Manage filters to manage your workflow: Ready to Publish (which can indicate something is ready to be reviewed) and Rejected Draft (which can indicate something failed that final review and still needs work).

Use tags to track more detailed progress

As we mentioned in the Optional/helpful sections of [The basics: editing standards](#), some CAPRA customers also use optional tags to help manage their self-assessment workflow.

Tags + CAPRA workflows

For CAPRA customers, the most common ways to use tags are:

- If you're using shared author accounts, create a tag for each collaborator's name. Add that name tag to the standards that you need that person to work on.
- Create tags for documents, policies, or other real-world actions that haven't been completed yet, so you can easily pull a list of standards that need editing once that real-world task is done. (Such as: 2021 Budget, 2021 Audit Results, August Board Meeting, etc.)

Once tags have been added to articles, you can create custom **Knowledge Base > Manage** filters for those tags, so you can quickly generate lists of the articles tagged in certain ways.

See [Tags](#) for more information on working with tags, or see [Creating a custom Manage filter](#) for steps on how to create a Manage filter to look for specific tags.
