Content audit cycle

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Once you have content in your knowledge base, how will you keep it updated? And how often? We consider this entire maintenance/update process to be your content audit cycle.

In our experience, a lot of people wait until the first full content audit they do to figure out how they want their content audit cycles to work.

While you can do it this way, taking this approach often means that you end up having to do a small mountain of work in order for your audits to run properly. Giving this process a bit of thought as you first start organizing and creating content can make your life MUCH easier when audit time rolls around!

We've seen three general content audit approaches used:

- **Set period audit**: done on a set schedule
- **Rolling period audit**: done on a set schedule based on when content was previously updated/reviewed
- **Just-in-time audit**: updating or auditing content on an as-needed basis, triggered by specific events

We've also seen different audit cycles used within the same knowledge base for different content. 😊

Below, we explain each content audit cycle in more detail and recommend features to help facilitate it.

Set period audit

In this type of audit cycle, you're doing a full review of all content on a set time schedule, such as:

- Monthly
- Quarterly
- Semi-annually
- Annually
- Bi-annually

Pros:

- You can schedule and plan in advance
- This type of set schedule can make it easier to bring in additional authors or subject matter experts to make an audit go faster
- Some security, compliance, or industry standards mandate this type of audit cycle

Cons:

- High effort: This tends to cause a high volume of work on a set schedule.
- Redundancy: Doing a full content audit can mean you're re-reviewing content that won't have had any reason to change since the last audit.

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Recommended Features

- Tags or Versions
- Custom filters in Manage Articles

For this type of audit, we recommend creating tags for each audit time period. (In the **Tags** page, you can edit these tags to mark them as hidden from readers if you don't want them exposed in your final knowledge base.) So if we were doing quarterly audits, we might have a tag for "2022 Q1", "2022 Q2", and so on.

Create a custom filter in Manage Articles that pulls in all Published and Needs Review articles, and set that audit tag as an "Excluded tag".

When you review an article as part of that audit, add the tag for the audit to indicate the review is "complete."

Alternatively, you can use custom versions for each audit and create/activate a new version as part of the review process.

Either approach has the same type of benefits:

1. It provides a good compliance trail/proof of audit.
2. You can take a CSV export of any Manage Articles filter and include the Tags or Version Number field to provide more reporting/visibility around the audit.

The tag approach has one added benefit: As you work, the custom Manage filter you created will exclude all articles with the current audit's tag, which makes it easier to see how many articles remain and to coordinate the audit among multiple people.



If you are required to complete this type of audit, we still recommend using some of the features in Just-in-time auditing (tags + custom filters) to help keep your content updated between official audit cycles.

Rolling period audit

In this type of audit cycle, you're making sure each piece of content has been reviewed or updated in the last xx time period, such as:

- In the last three months
- In the last six months
- In the last year

Pros:

- Makes audits an ongoing part of knowledge base maintenance
- Spreads out the work to a more manageable level
- Reduces the redundancy of reviewing content that was recently updated
- As with the set period audit, this can be required for certain compliance, security, or industry standards

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Cons:

- This format often seems to be carried by a single person
- The ongoing nature can make it hard to quantify or track how much time is going toward the audit

Recommended Features

- **KB settings > Article editor** option to automatically set articles to Needs Review status if older than the below date.
- Standard Manage Articles filter for Needs Review (Go to **Manage**, select **Needs Review** in the **Standard** portion of the dropdown)
- Internal note or Versions

Alternative:

- Custom filters in Manage Articles using Last Modified Date filter
- Internal note or Versions

Either of the recommended feature options above will let you access a list of articles which has not been modified in a specific time period.

The first option will automatically set all articles that haven't been modified in a set time period to a Needs Review status. This keeps them published, but just uses a different status within the editor and Manage Articles screens.

The second option won't touch the publishing status, but will let you filter to show only articles that haven't been updated in a specific time period.

In both scenarios, you'd want to:

1. Create/open the appropriate filter in Manage Articles.
2. Review each article.
3. If you make content changes during the review and save, the Last Modified Date will update and the article will drop out of your list.
    - This might be a good time to use a new version for the content.
    - Alternatively, you can add an internal note or version note with your name and the review date, if you need to track an explicit audit/review date.
4. If you don't need to make any content changes, you can:
    - Add an internal note or version note to say you reviewed the article on xx date and it did not need changes. This will provide a record of the review and will also update the Last Modified Date.
    - Create a new version, make no changes to it, and activate it. This will also update the Last Modified Date as the version is activated.

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Just-in-time audit

This is our own preferred audit cycle for most of our support documentation, but it's the trickiest to explain. You can think of it as ad hoc or as-needed auditing, if you'd prefer. ☺

If you don't have any security, compliance, or industry requirements to perform audits on a set schedule, then you're left to make your own decisions about when content should be updated.

This gives you the most flexibility, but it also puts the most responsibility on you to craft a schedule or workflow that makes sense to you.

Recommended Features

- Tags
- Versions
- Custom filters in Manage Articles

This setup requires a bit more planning and forethought, but don't let that discourage you. (We use it ourselves.)

The idea is that you add tags to help you identify content that needs to be audited when some real-world event happens. Then, when that real-world event occurs, you can create a custom filter in Manage Articles to pull a list of the articles with that content, and work through those articles to add updates.

For example: in our support knowledge base, we have a tag for each page in the KnowledgeOwl app (such as Style Settings and Article Editor).

When we create or update articles, we make sure that they have tags for all of the pages in our application that they reference.

Then, if we release a change to that page, we can use a custom filter in Manage Articles to pull a list of all articles that relate to that content and update them by working through the filtered list.

The combination audit cycle

Sometimes, different audit cycles might be appropriate for different content. Don't be afraid to use the audit cycle that makes the most sense for your content!

For example:

For the majority of this support knowledge base, we use a just-in-time audit cycle. We update existing pages or create new ones as we release changes within KnowledgeOwl.

But we also have a few pages that get maintained for security and compliance reasons, such as our List of Sub-processors. These types of content are reviewed on a set schedule (some of them quarterly, some annually) as part of our larger security audit process.

You can either use tags to denote different audit cycles, or maintain a list of content that is the "exception" to your

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main audit cycle. Whatever makes sense for you!

Documenting your audit cycle

Once you've given some thought to your audit cycle, we recommend documenting it either in KnowledgeOwl or wherever else you're capturing processes and workflows related to your knowledge base.

At minimum, include:

- The overall frequency of the audit cycle(s)
- Who's responsible for audits
- Which features or steps are followed during audits
- Settings for any custom filters used in Manage Articles as part of the audit process

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