



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 complete. 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 three ways:

1. Review the article call-outs on the **Articles** page. Refer to the [Articles page instructions](#).
2. Use the standard Needs Review filter in the **Manage** page. Refer to the [Needs Review filter in Manage instructions](#).
3. Use a chapter-specific custom filter in the **Manage** page. Refer to the [Custom filter in Manage instructions](#).

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, standards 1.1 and 1.2 still need to be completed:

Sample Needs Review callout badge next to standard titles



Pros to this approach

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



Cons for this approach

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

Needs Review filter in Manage

On the **Manage** page, accessible from the left navigation, use the Needs Review filter to get a complete list of all standards with a Needs Review status:



Pros to this approach

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 of this approach

This gives you a complete list of all Needs Review standards in the entire knowledge base. It can be unwieldy if you're trying to track progress on a specific chapter.

Custom filter in Manage

On the **Manage** page, you can also create a custom filter to pull a more specific list of articles. Refer to [Create a custom Manage filter](#) for detailed instructions on creating a custom Manage filter.

For CAPRA workflows, the most common custom filter is to use:

- **Status of Needs Review**
- **Category** set to a specific individual chapter

The custom filter screen with these settings would look like this:

Sample custom Manage filter with a Chapter selected as a Category filter and the Needs Review status

This will give me a list of the standards in Chapter 1 only that are in Needs Review status:

Sample custom Manage filter output.



Pros to this approach

This filter gives you a count and punchdown list for the standards remaining in the selected chapter. 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 of this approach



No real cons to this approach, though you may need to create different filters for different chapters or edit your filter to change the Category selected.

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 select the **View knowledge base** link in the left menu 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're complete.

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

1. In the left navigation, go to **Manage**.
2. In the dropdown at the top, select **Needs Review** from the Standard filter options.
3. Once the filter loads, select the checkbox to the left of the Article Name field to select all the standards on the screen:
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:
5. The message will change to confirm you've selected all in filter. Select the **Bulk Edit** link between the filter dropdown and the **Article Name** column:
6. The **Bulk Edit Articles** modal opens.
7. In the modal, select **Draft** from the **Publishing Status** dropdown.
8. Then select **Update Articles**.

9. This will set all your **Needs Review** articles to have a **Draft** publishing status. The **Bulk Edits** take a little to process, so you'll see a progress bar across the top while we make the edits. A confirmation message displays once it's complete.

With these changes made, you can track the standards still needing work using the same strategies as outlined in

[Tracking complete/incomplete standards](#) but using the **Draft** filter or status instead of Needs Review.

You can also use two other unpublished statuses and their related Manage filters to manage your workflow:

- **Ready to Publish:** Indicate something is ready to be reviewed.
- **Rejected Draft:** Indicate the standard isn't quite ready for publication yet and needs some changes.

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: 2026 Budget, 2026 Audit Results, August Board Meeting, etc.)

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

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