

Knowledge Owl Authoring/Style Guide

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Best practices

- Always use Chrome
- Don't repeat article title in article
- Use Legacy for authoring
 - Modern vs. Legacy – explain
- Always save articles along the way – it does not auto-save! (you will get an alert if you try to navigate away from the page if changes have been made without saving)
- Make sure that Publishing Status and Category have been updated before the final save!
- Knowledge Owl online help is awesome! <https://support.knowledgeowl.com/help>

Branding

- Use the default settings in Knowledge Owl for headers and sub-headers
- Heading 2 – use for section titles
- Heading 3 – use for category titles under heading 2

Bullets and numbering for lists

Follow the following formats for using bullets and numbering.

Numbers

Use numbers if it's a process or steps.

Bullets

Use bullets when you want to call out specific elements underneath a sub-header that you want to bring attention to.

EX: Data Entry Fields

1. Step one

2. Step two

a. Nested step a

b. Nested step b

- Customer Number
- Customer Type
- Customer Status

Spelling/Grammar

- Always check spelling! Spell check is browser-based. We recommend using Grammarly to assist with spelling and grammar. It's free!

Linking to another article

- Legacy = Modern =
- Either path will take you to this screen:
 - ◻
- Begin typing the article you wish to link to and then select the article from the search results.
- You can also change the text that displays (Link Text) and check to have the article to open in a new browser tab.
- Click Add Article Link when ready

Add a file (vs. attachment)

- Store files **[tbd]**
- In Knowledge Owl, files are included within the body of the article vs. as an attachment in a separate section.
- Legacy = Modern =
- Both paths take you to the option of uploading a file.
- When putting a file into the article (large attachment), use the following verbiage:
 - Find the file for information on (enter title of file) then attach file here. Change name of file (in Modern) by clicking on the name of the file and clicking on the middle option.
 - Then update the text line from the title of the file to the word "here." Make sure to enable the option to Open in new tab and then click update.
 - Underline the word here.
 - Use Heading 3 for the entire sentence.
 - It should appear as below when finished

◻

Images



Do not put bullets with images.

- Legacy = Modern =
- Here are some differences:

Legacy

- To change sizing or add a border, right click on the image and select Image Properties

Modern

- To change sizing, click on the photo and this section appears, click the diamond shape
- To add a border, you will have to switch to Legacy to do so or add your image with the border intact
- Follow these guidelines for images
 - Sizing – 150×150 pixel thumbnail (square) 300×200 pixel medium (portrait) 200×300 pixel medium (landscape) 600×600 pixel large (rectangle)
 - Border – size 3/black
 - Left indent (do not center image)

Categories

Every article should have a category/sub-category. To add one:

1. Go to the Category section and click the gear icon.
2. Select the category (start typing) and click Select Category or Change Category.
3. Save



You can [add a category and sub-category](#) within each section.



Do NOT add categories to the main page without checking with Sarah and Jenn.

Other tips!

- Alphabetize categories or sub-categories for easy reference
- Alphabetize articles

To change an article's category, click on the gear icon next to the article and begin typing the new category; click Change Category once you find the new category.



Adding Code

To add code to an article, or add a query, copy the code and click the following sections to paste your code:

- Legacy
 - ▣
- Modern
 - ▣

Adding special callouts within an article

- Use Modern
 - ▣

Troubleshooting Article Formatting

Description of Issue (Heading 2) – enter a description of the issue including any errors

Fixes (Heading 2) – enter fixes/solutions

Example:

▣

Article Versions

To revise an existing article, there is no need to create a new version.

1. Write a short bullet of what you did in the Version Note section – date, your initials, brief bullet on what you did
 - ▣

2. Click Save



- There is no need to put a 'Revision History' section w/in the article
- Put any notes in reverse chronological order – the most recent first

- If you do want to add an internal note for future reference that is more detailed, follow this process here - <https://support.knowledgeowl.com/help/new-internal-note-field>

Article Call Outs

If you've made a big change to an article and you want to call it out for the reader, do the following:

- Updated – Made a change that you want to call attention to
- New – New article



NOTE: The default setting is No Status.



Do not change the status for minor corrections.



Publishing Status

Change to **Ready to Publish**.

Sarah and Jenn will review daily and publish articles or send them back for edits.