



Create readers in bulk

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You can create and/or update multiple reader accounts at once by uploading a CSV spreadsheet.



As soon as your import completes, your readers will receive a Welcome Email with login instructions, so if you're going to test the import, don't use real readers' email addresses!

Bulk import/update overview

You'll upload a .csv file containing all of the readers you want to import or update. The importer can:

- Delete all existing readers (this will remove all current accounts and replace them with the accounts in the spreadsheet)
- Skip existing readers
- Update existing readers (if it matches the email address to a current reader account, it will update all the additional information for the reader with what's in the spreadsheet, but leave their password and email address untouched)



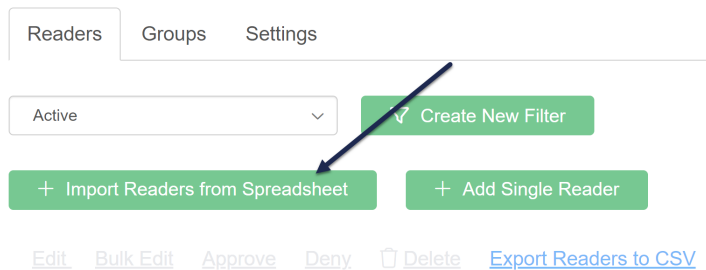
If you use Single Sign-On for your reader accounts:

The bulk importer will not compare or update existing SSO-managed reader accounts in an import/update situation, and it cannot create new SSO-managed accounts. To update those accounts, either contact your SSO administrator to adjust the details on the account or update the KB Access options for readers individually. Bulk importing a .csv file when all your readers are SSO-managed will create duplicate KO-managed reader accounts. Don't do this!

Getting a template CSV

You can download a sample CSV file to use as a template for your bulk import:

1. Click on your profile icon/name in the upper right.
2. Select Readers from the dropdown to access the Readers area of your account.
3. Click the Import Readers from Spreadsheet button at the top.



Sample Readers screen, calling out the Import Readers from Spreadsheet button

4. This will open a pop-up where you can upload your CSV file. Click the link on the lower left to **Download Example CSV**.



5. This will start a download of a sample CSV file (it will also include custom fields):

	A	B	C	D	E	F
1	Email / Username (login)	First Name	Last Name	Password (leave blank for self-administered passwords)	Groups (optional)	Help Sites (optional)
2	User1@email.com	User	User	temp1	Group1,Group2	My Knowledge Base 1,My Knowledge Base 2
3						
4						
5						
6						
7						

Adding data to your CSV

Whether you use our template or your own CSV file, as you fill out the CSV, you'll enter one row for each reader account you wish to create. For each reader, you'll assign an email (to be used as their username), and first and last name. You can assign all readers in a CSV to the same set of groups and knowledge bases in the import options for the upload, or you can assign specific readers to different groups and knowledge bases using separate fields in your CSV.

Use comma-separated lists (with no spaces after the comma) for fields where you want to assign the reader to more than one option (such as Groups, Help Sites, etc.).


See more detail in the following list of CSV fields and the sample import below:

- **Email / Username (login):** This is the email address the reader will use to login. It needs to be unique. Their welcome email will be sent to this address once the upload is complete.

- **First Name:** The reader's first name.
- **Last Name:** The reader's last name.
- **Password (optional):** You should only use this field if you are using admin-managed passwords for readers. (You can confirm this by going to Readers > Settings and reviewing the Password Management option selected. If "Passwords can only be managed by KnowledgeOwl admins" is selected, use this field. Otherwise, ignore it.)

Readers Groups **Settings**

Reader Password Security


Password Management  Passwords can only be managed by KnowledgeOwl admins
 Allow readers to administer their own passwords
Any existing readers will be forced to change their password on next login.



Password Attempts Allow unlimited password attempts

If this option is selected, use the Password field in your CSV. Otherwise, ignore this column.

- **Groups (optional):** You only need to use this field if you are assigning different readers in this CSV to different groups. (If you do not use reader groups, or don't want to assign any readers to groups, or are assigning all readers in this CSV to the same group(s), you can ignore this field.) If you are assigning individual readers in the CSV to one or more reader groups, use a comma-separated list of group names with no spaces after the commas (example: Administration,Support will assign the reader to both the Administration and Support reader groups).



You cannot create new groups here; you must reference existing groups.

- **Help Sites (optional):** If you have multiple knowledge bases and want to assign readers in this spreadsheet to different knowledge bases, use this column. (If you only have one knowledge base, or you are assigning all readers in this spreadsheet to the same knowledge base(s), you can ignore this column.) The knowledge base name entered here must match what you see in the Knowledge base name field in Settings > Basic. To assign a single reader to multiple knowledge bases, use a comma-separated list with no spaces after the commas (example: "KO Product Docs,KO Blog" will assign the reader to the KO Product Docs knowledge base and the KO Blog knowledge base).
- **Custom Field 1-5 (optional):** Use these fields only if you have Custom Fields in your Reader Signup form (visible in Readers > Settings). Match the Custom Field heading to the custom field(s) you're using, and enter appropriate values.

Reader Signup Custom Fields

<input checked="" type="checkbox"/> Required	Custom Field 1 Label	<input type="text" value="Organization"/>	<input checked="" type="checkbox"/> Enabled
<input type="checkbox"/> Required	Custom Field 2 Label	<input type="text" value="Organization"/>	<input type="checkbox"/> Enabled
<input type="checkbox"/> Required	Custom Field 3 Label	<input type="text" value="Address"/>	<input type="checkbox"/> Enabled
<input type="checkbox"/> Required	Custom Field 4 Label	<input type="text" value="Something"/>	<input type="checkbox"/> Enabled
<input type="checkbox"/> Required	Custom Field 5 Label	<input type="text" value="Something else"/>	<input type="checkbox"/> Enabled

Reader Signup Custom Fields

Here's a sample of a saved CSV ready for upload:

	A	B	C	D	E	F	G	H
1	Email / Username (login)	First Name	Last Name	Password (leave blank for self-administered passwords)	Groups (optional)	Help Sites (optional)	Organization	Custom Field 2 (optional)
2	linus@knowledgeowl.com	Linus	Owl		Support	KO Product Docs,KO Blog	KnowledgeOwl	
3	pacino@knowledgeowl.com	Owl	Pacino		Developers,Support	KO Product Docs,KO API Docs	KnowledgeOwl	
4	owlbert@knowledgeowl.com	Owlbert	Einstein			KO Product Docs	KnowledgeOwl	
5	jimmy@knowledgeowl.com	Jimmy	Tallon		Developers	KO API Docs	KnowledgeOwl	
6	owlbus@owlette.com	Owlbus	Dumbledore		Partners	KO Product Docs	Owlette	
7	capone@owlette.com	Owl	Capone		Partners	KO Product Docs	Owlette	
8								

Sample reader CSV, ready for import

This will create 6 new readers:

- **Linus Owl:** will receive a randomly-generated password, be assigned to the Support group, and will gain access to the KO Product Docs and KO Blog knowledge bases. Our custom Organization field marks this reader as being part of KnowledgeOwl.
- **Owl Pacino:** will receive a randomly-generated password, be assigned to the Developers and Support groups, and will gain access to the KO Product Docs and KO API Docs knowledge bases. Our custom Organization field marks this reader as being part of KnowledgeOwl.
- **Owlbert Einstein:** will receive a randomly-generated password, not be assigned to any groups, and will gain access to only the KO Product Docs knowledge base. Our custom Organization field marks this reader as being part of KnowledgeOwl.
- **Jimmy Tallon:** will receive a randomly-generated password, be assigned to the Developers group, and will gain access to only the KO API Docs knowledge base. Our custom Organization field marks this reader as being part of KnowledgeOwl.
- **Owlbus Dumbledore and Owl Capone:** will receive a randomly-generated password, be assigned to the Partners group, and will gain access to only the KO Product Docs knowledge base. Our custom Organization field marks both readers as belonging to Owlette.

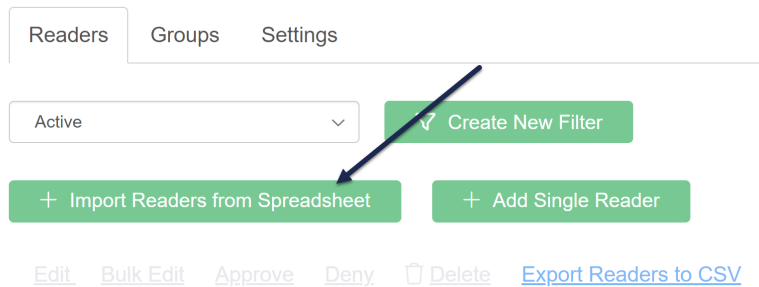
Uploading your CSV

Once you have your CSV created, return to the Readers page to upload it and create your new reader accounts.

1. Click on your profile icon/name in the upper right.

2. Select Readers from the dropdown to access the Readers area of your account.

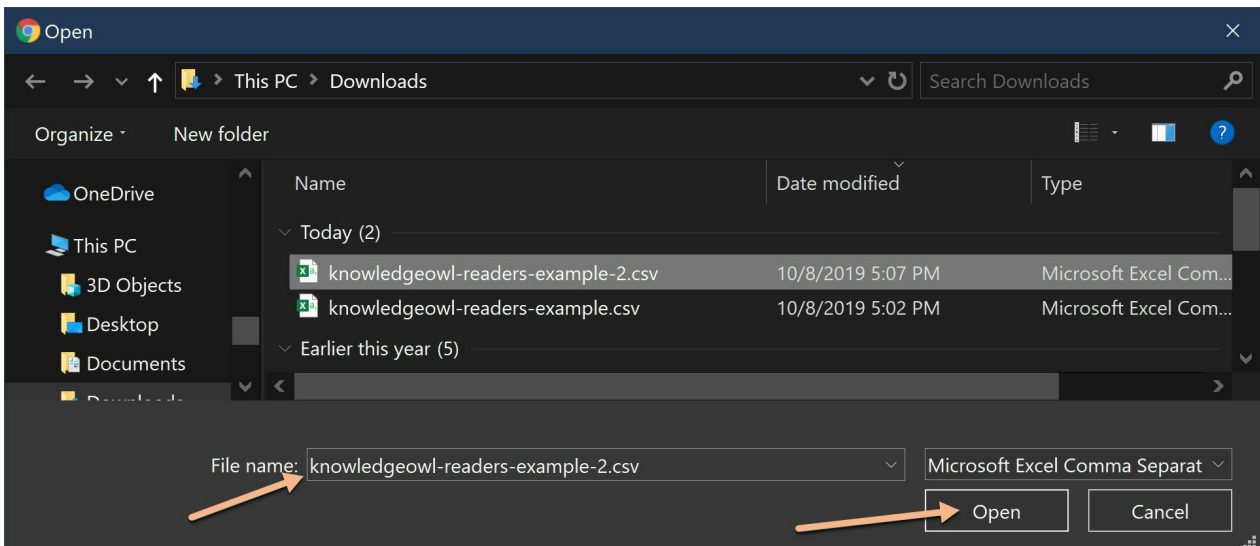
3. Click on the + Import Readers from Spreadsheet button.



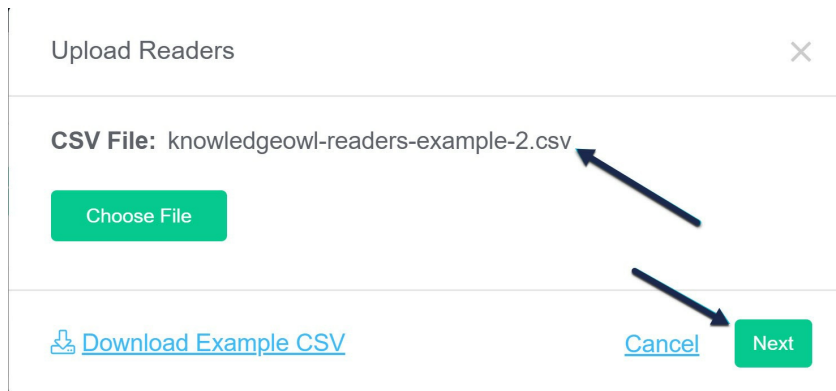
4. In the Upload Readers pop-up, click the Choose File button.



5. This will open a file browsing window; navigate to the CSV file you've saved, select it, and click Open. (Note: your screen may look different depending on your browser, operating system, and display settings.)

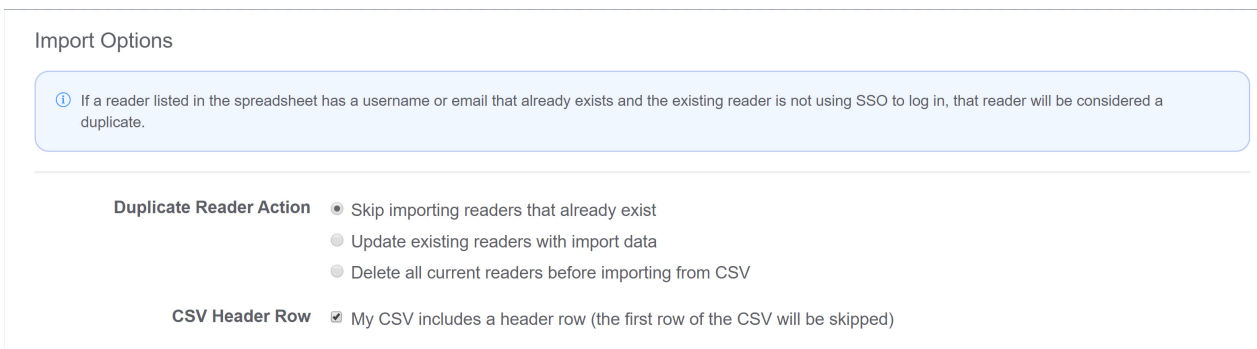


6. Confirm that the CSV file name displayed is the one you meant to upload. If it's incorrect, click Choose File and repeat the previous step. Once it's correct, click Next.

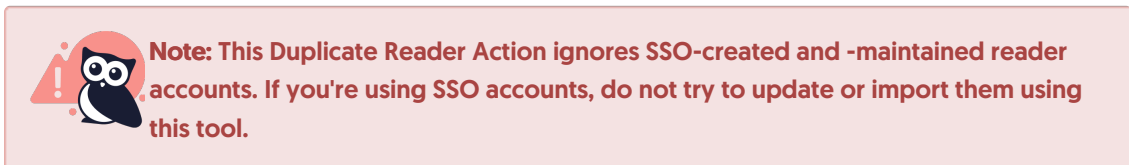


7. This will take you to the reader **Import Options** screen. Here, you'll decide what to do if your spreadsheet contains readers who already exist, map the columns in your CSV to the appropriate fields in KnowledgeOwl, and/or assign the same groups or knowledge bases to all readers in the CSV.

8. The top two options set the overall way the import will be handled.



- **Duplicate Reader Action:** As part of the import, we'll check to be sure that the email address you're adding doesn't already exist. If it does already exist, this setting tells us what to do with it. The options are:
 - **Skip importing readers that already exist:** Any email address in the CSV that already exists in your account will be ignored completely.
 - **Update existing readers with import data:** For email addresses found in the CSV that already exist in your account, all related fields will be updated. This will overwrite any existing groups, knowledge base access, and so on for that reader.
 - **Delete all current readers before importing from CSV:** This will delete all existing readers and use the CSV to create all reader accounts fresh. Only use this option if you want only the readers in the CSV to exist in your account.



- **CSV Header Row:** If you've used our sample CSV or created your own using your own headers, be sure this box is checked so the importer ignores the header row.

9. The Map Reader Fields section will let you map the fields in your CSV file to the corresponding fields in KnowledgeOwl using the provided dropdowns. It will auto-select titles that match exactly, but we recommend reviewing all of these fields to be sure they're importing to the correct fields.

Map Reader Fields

i Use the dropdown menus below to match the columns of your CSV to the correct reader fields. Knowledge base and group access can be manually chosen by using the "Give all uploaded readers access to the following..." option.

Email (Username)

First Name

Last Name

Password Reader will be emailed a randomly generated temporary password
If you choose to update existing readers, those reader will retain their current passwords.

Groups Assign groups using spreadsheet column

 Give all uploaded readers access to the following groups

Knowledge Base Access Assign access using spreadsheet column

 Give all uploaded readers access to the following knowledge bases

Custom Field 1

Custom Field 2

Custom Field 3

Custom Field 4

Custom Field 5

- **Email (Username):** map this to the column containing your reader's email addresses
- **First Name:** map this to the column containing your reader's first name
- **Last Name:** map this to the column containing your reader's last name.
- **Password:** this option will be unselectable if you don't have admin-managed passwords. If you do use admin-managed passwords, you'll have a dropdown to map this field to the password field in your CSV.
- **Groups:** If you have a column designating readers' groups, use the **Assign groups using spreadsheet column** setting and the dropdown below it to map that field.

Groups Assign groups using spreadsheet column

Base Access

Custom Field 1

Custom Field 2

Custom Field 3

Custom Field 4

Custom Field 5

— SELECT COLUMN —

— SELECT COLUMN —

Email / Username (login)

First Name

Last Name

Password (leave blank for self-administered passwords)

Groups (optional)

Help Sites (optional)

Organization

Custom Field 2 (optional)

Custom Field 3 (optional)

Custom Field 4 (optional)

Custom Field 5 (optional)

— SELECT COLUMN —

Map readers to groups using the Groups field in the CSV

If you didn't need the Groups column in your CSV because you are assigning all readers in this CSV to specific groups, use the **Give all uploaded readers access to the following groups** option and select the groups you want to assign these readers to.

Groups Assign groups using spreadsheet column

— SELECT COLUMN —

Give all uploaded readers access to the following groups

Production

Support


Sales

This will assign all readers in the CSV to the Support group

- o **Knowledge Base Access:** If you have a column designating reader's knowledge base access (the Help Sites column in our template), use the **Assign access using spreadsheet column** setting and the dropdown below it to map that field.

Give all uploaded readers access to the following groups:

Knowledge Base Access Assign access using spreadsheet column

Help Sites (optional) 


Give all uploaded readers access to the following knowledge bases


Assign knowledge base access using the column called Help Sites in the CSV


If you want to assign all readers in the CSV to the same knowledge base(s), use the **Give all uploaded readers access to the following knowledge bases** option and select the knowledge bases you want to assign these readers to.


- o **Custom Fields 1-5:** If you use custom reader signup fields, be sure to map the custom fields in your spreadsheet to these custom fields. If you don't use custom fields at all, you can ignore this section. In our example, we had a custom field for "Organization" but no other custom fields, so that would look like this:


Give all uploaded readers access to the following knowledge base:

Custom Field 1 Organization 

Custom Field 2 — SELECT COLUMN — 

Custom Field 3 — SELECT COLUMN — 

Custom Field 4 — SELECT COLUMN — 

Custom Field 5 — SELECT COLUMN — 

Sample custom field mapping

10. Once you have finished your field mappings, click **Import Readers** to complete your import.

Give all uploaded readers access to the following knowledge base


Custom Field 1

Custom Field 2

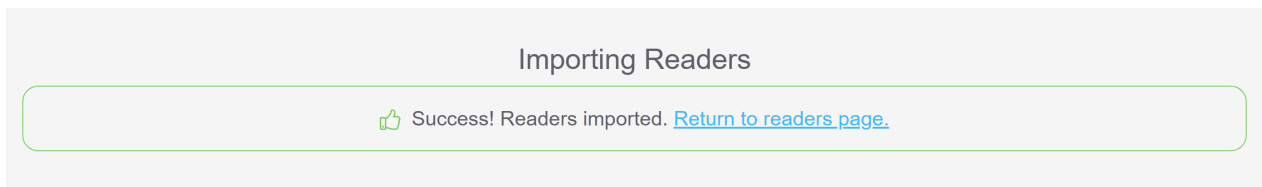
Custom Field 3

Custom Field 4

Custom Field 5



11. While the import processes, you'll be taken to the **Import Readers** screen, which will display a progress bar.
12. Once the import completes, you'll see a confirmation message:



13. Click the **Return to readers page** link to return to the readers page and see your new readers.

As soon as the import completes, your readers will receive a welcome email. Existing readers that were skipped will not receive an email. Readers whose accounts were updated will only receive a welcome email if they were given access to a knowledge base they haven't accessed before.

Troubleshooting reader imports

The Reader Import Options settings will handle when an existing reader matches the username you've included in your reader import file. But if the CSV file you're trying to import contains the same username more than once, you'll see an error as the import is being processed. It will look something like this, and will include a list of each duplicate username:

Importing Readers

⚠ The following usernames appear in your CSV file multiple times:

- linus@knowledgeowl.com

If you continue, we will only import the first instance of each reader.

Continue Import

Cancel Import



Sample warning when the CSV file contains duplicate usernames

If you get this warning and you click **Continue Import**, it will use the data from the **first time** the duplicate username appears in the spreadsheet.

If you click **Cancel Import**, it will cancel the import and you can open your CSV, remove the duplicate, re-save the file, and begin the import again.

Does capitalization matter in usernames/email addresses?

The bulk reader import tool strips out capitalization in the username/email address, for consistency. (Individually-created readers' usernames will also be set to lower case.)

Do I need to worry about trailing spaces at the end of email addresses or names?

No. The bulk importer will automatically trim trailing spaces from email addresses, first name, and last name. (For email addresses, it will trim them *before* it does the check for duplicate/existing readers.)

Will the bulk import tool check for invalid email addresses?

No. It will import the email address/username as you have it in the CSV. Be sure to review your CSV to be sure the email addresses you're using are correct and valid.

What if I use a group name that doesn't exist?

The bulk import tool will not throw an error if you reference groups that don't exist. It will just skip that group.

For example, let's say one of the rows in my spreadsheet looks like this:

	A	B	C	D	E	F	G
1	Email / Username (login)	First Name	Last Name	Password	Groups (o	Help Sites (optional)	Organization
2	linus@knowledgeowl.com	Owlbus	Dumbledore		Partners	KO Product Docs	Owlette
3							

If the group called "Partners" doesn't exist, this reader will be created and assigned to KO Product Docs, but they won't be assigned to any reader groups.

