



Edit readers in bulk

Last Modified on 01/31/2024 4:05 pm EST

While you can edit individual readers by clicking on their name in the Readers list, sometimes it makes more sense to edit a group of readers. This is what the **Bulk Edit** option is for. Bulk Edit allows you to select multiple readers and:

- Change their status (from Active to Deleted, or from Deleted to Active)
- Add to their reader groups
- Replace their reader groups with new groups
- Remove all group membership
- Add to their knowledge base site access
- Replace their knowledge base site access
- Remove all knowledge base site access

If you are adding or replacing knowledge base site access, you can also choose whether to send a new welcome email to the reader or not.

Bulk edit can be incredibly useful if:

- You've recently created a new knowledge base and you'd like to add existing readers to it
- You've recently created new KO-only reader groups and you'd like to add existing readers to these groups
- You want to remove access to a reader group or knowledge base without deleting it outright
- You'd like to delete a bunch of readers
- You'd like to recover a bunch of deleted readers



These steps are for bulk editing status, reader group, and knowledge base access of readers. If you'd like to approve or deny readers, see [Approve or deny multiple readers](#).

To complete a bulk edit of readers:

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. Use the checkboxes to select the readers you'd like to bulk edit. You can use the standard filters or **a custom reader filter** by themselves or with search to find the readers you need.
 - a. You can also select all readers on the page by using the checkbox in the upper left corner.

Readers Groups Settings

Active

[Edit](#) [Bulk Edit](#) [Approve](#) [Deny](#) [Delete](#) [Export Readers to CSV](#) Readers per page: 20 [50](#) [100](#)

<input checked="" type="checkbox"/>	Login	Name	Site Access	Groups	Last Activity
All 20 readers on this page selected. Select all 34 readers that match the current filter					
<input checked="" type="checkbox"/>					
<input checked="" type="checkbox"/>					

b. Once you've selected all readers on the page, if there are multiple pages, you can click the link that appears at the top of the reader list to select all readers in the filter/view.

Readers Groups Settings

Active

[Edit](#) [Bulk Edit](#) [Approve](#) [Deny](#) [Delete](#) [Export Readers to CSV](#) Readers per page: 20 [50](#) [100](#)

<input checked="" type="checkbox"/>	Login	Name	Site Access	Groups	Last Activity
All 20 readers on this page selected. Select all 34 readers that match the current filter					
<input checked="" type="checkbox"/>					
<input checked="" type="checkbox"/>					

c. Not sure what you've selected? If you select all readers that match the current filter, the text will change and you'll have the option to **Clear selection**.

Readers Groups Settings

Active

[Edit](#) [Bulk Edit](#) [Approve](#) [Deny](#) [Delete](#) [Export Readers to CSV](#) Readers per page: 20 [50](#) [100](#)

<input checked="" type="checkbox"/>	Login	Name	Site Access	Groups	Last Activity
All 34 readers that match the current filter selected. Clear selection					

4. Once you've selected all the readers you'd like to edit, click the **Bulk Edit** link near the top of the list.

Readers Groups Settings

Active ▼ 🔍 Create New Filter

+ Import Readers from Spreadsheet + Add Single Reader

[Edit](#) [Bulk Edit](#) [Approve](#) [Deny](#) 🗑️ [Delete](#) [Export Readers to CSV](#)

<input type="checkbox"/>	<u>Login</u>	<u>Name</u>
<input checked="" type="checkbox"/>	alice@knowledgeowl.com	Wonderland, Alice
<input checked="" type="checkbox"/>	beyonce@knowledgeowl.com	Owls, Beyonce
<input checked="" type="checkbox"/>	elbert@knowledgeowl.com	Owl, Hoot

5. This will open the Bulk Edit Readers pop-up where you can select what type of edits you'd like to make:

Reader Status: 1 Keep Current Status ▼

- 4 Notify readers of new site access via email

2 Reader Groups: Maintain Current Groups None [blurred] [blurred]**3 Site Access:** Maintain Current Site Access None [blurred] [blurred] [blurred] [blurred] [blurred] [blurred] [blurred] [blurred][Cancel](#) 5

a. Use the **Reader Status** dropdown to set readers as Active or Deleted. [Unless you're recovering deleted readers or deleting a lot of readers, leave this as Keep Current Status.]

b. Use the **Reader Groups** checkboxes to make changes to these readers' reader groups:

- To keep these readers' existing reader groups and **add additional groups**:

- Check the box next to **Maintain Current Groups**.

- Check the box(es) next to the groups you'd like to add.

- To **remove** these readers' existing reader groups and **replace** them with new groups:

- Uncheck the box next to **Maintain Current Groups**.

- Check the boxes next to the groups you'd like to replace the readers' current groups with.

- To **remove all reader groups** from the selected readers:

- Uncheck the box next to **Maintain Current Groups**.

- Check the box next to **None**.

c. Use the **Site Access** checkboxes to make changes to the knowledge bases these readers can access:

- To keep these readers' existing knowledge base access and **add access to additional knowledge bases**:

- Check the box next to **Maintain Current Site Access**.

- Check the box(es) next to the knowledge bases you'd like to add.

- To remove these readers' existing knowledge base access and replace them with new knowledge bases:
 - Uncheck the box next to **Maintain Current Site Access**.
 - Check the boxes next to the knowledge bases you'd like to grant the readers access to.
- To remove all knowledge base access from the selected readers:
 - Uncheck the box next to **Maintain Current Site Access**.
 - Check the box next to **None**.

d. If you are adding the readers to new knowledge bases in the **Site Access** section, you can choose whether or not you'd like to send a welcome email for the new knowledge base access to these readers using the **Notify readers of new site access via email** checkbox. This defaults to unchecked (no email will be sent). To send a welcome email, check the box.

e. Once you've made all your bulk edit selections, click on the **Update Readers** button to continue with the bulk edit.

6. A pop-up will appear asking you to confirm you'd like to complete the bulk edit, providing some detail on the number of readers selected. For a single reader or edits to 6+ readers, you'll see a count; for edits to 2-5 readers, their names will be listed:

Are you sure you want to perform this update on the following readers? This operation cannot be undone. ✕

- alice@knowledgeowl.com
- beyonce@knowledgeowl.com
- elbert@knowledgeowl.com

Cancel

OK

Sample reader bulk edit confirmation

7. Click **OK** in the confirmation pop-up to complete the bulk edit.


Example

Linus would like to update a group of readers to:

- Give them access to two new knowledge bases (Hiking with Sass and Kate Work Tests)
- Overwrite any existing reader group assignments they have and add them to the Production and Support reader groups
- Send a welcome email for the new knowledge base access

Here's the configuration he'd use:

Bulk Edit Readers ✕

 This update will overwrite existing reader group assignments for all selected readers

Reader Status: <input type="text" value="Keep Current Status"/> <input checked="" type="checkbox"/> Notify readers of new site access via email	Reader Groups: <input type="checkbox"/> Maintain Current Groups <input type="checkbox"/> None <input checked="" type="checkbox"/> Production <input checked="" type="checkbox"/> Support	Site Access: <input checked="" type="checkbox"/> Maintain Current Site Access <input type="checkbox"/> [blurred] <input type="checkbox"/> [blurred] <input type="checkbox"/> [blurred] <input type="checkbox"/> [blurred] <input checked="" type="checkbox"/> Hiking with Sass <input type="checkbox"/> Kate New Test <input checked="" type="checkbox"/> Kate Work Tests
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[Cancel](#)

Sample Bulk Edit Readers configuration

Here's what that configuration means:

- Unchecking the Maintain Current Groups box means that any existing reader group assignments for these readers will be removed.
- Checking the Production and Support reader group boxes will assign these readers to those groups.
- Leaving the Maintain Current Site Access box checked means that this bulk edit won't remove any existing knowledge base access these readers might have.
- Checking the boxes next to Hiking with Sass and Kate Work Tests ensures these readers will be added to both knowledge bases.
- Checking the Notify readers of new site access via email means a [reader welcome email](#) will be sent to these readers for the new knowledge base access.