Edit readers in bulk

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You can always edit individual readers by selecting their name from the Readers list. But sometimes it makes more sense to edit a bunch of readers at once.

This is what the **Bulk Edit** option is for.

Available bulk edit actions

Select multiple readers and then Bulk Edit to:

- **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 reader group membership**
- **Add to their knowledge base site access**
- **Replace their knowledge base site access**
- **Remove all knowledge base site access**

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

When to bulk edit readers

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. Refer to **Restore a deleted reader** for more detailed instructions on this process.

> **Bulk approval/denial**
> These steps are for bulk editing status, reader group, and knowledge base access of readers. If you'd like to approve or deny readers, refer to **Approve or deny multiple readers.**

Bulk edit instructions

To complete a bulk edit of readers:

1. Go to **Account > Readers**. The **Readers** page opens to the **Readers** tab.

2. Use the checkboxes to select the readers you'd like to bulk edit. Use the standard filters or **a custom reader filter** and/or 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.

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

   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**:

3. Once you've selected all the readers you'd like to edit, select **Bulk Edit** above the readers list

   The **Bulk Edit Readers** modal opens. where you can select the type of bulk edits you'd like to make.

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

   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 **Maintain Current Groups** box.

         ▪ Check the box(es) for the groups you'd like to add.

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

         ▪ Uncheck the **Maintain Current Groups** box.

         ▪ 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 **Maintain Current Groups** box.

         ▪ 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 **Maintain Current Site Access** box.

- Check the box(es) for 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 **Maintain Current Site Access** box.

  - Check the boxes for the knowledge bases you'd like to grant the readers access to.

- To **remove all knowledge base access** from the selected readers:

  - Uncheck the **Maintain Current Site Access** box.

  - Check the **None** box.

d. If you're adding readers to new knowledge bases in the **Site Access** section, 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, select **Update Readers** to complete the bulk edit.

5. A modal appears 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.

6. Select **OK** in the confirmation pop-up to complete the bulk edit.

Example bulk edit

Linus would like to update a group of readers to:
- Give them access to the new IA MC 2025 knowledge base without touching their existing knowledge base access.
- Overwrite any existing reader group assignments they have and add them to the Owlademy MC Students and KO Authors Only reader groups.
- Send a welcome email for the new knowledge base access.

Here's the configuration he'd use:

Reader Status:
- **Keep Current Status.** We won't change anyone from Active to Deleted (or vice versa).
- Check the box to **Notify readers of new site access via email**. We'll send a reader welcome email for any new **Site Access** selections.

Reader Groups:

- Uncheck **Maintain Current Groups.** This removes any existing groups they have and replaces them with our selection.
- Check the boxes for KO Authors Only and Owlcademy MC Students. This adds our readers to these groups.

Site Access:

- Check **Maintain Current Site Access.** This guarantees we don't remove their access to any existing knowledge bases.
- Check the box for **IA MC 2025.** This grants our readers access to this knowledge base.