



# Manage articles

Last Modified on 04/17/2024 11:32 am EDT

Search, sort, filter, bulk edit, and export articles under Knowledge Base > Manage.

## Manage Articles overview

Manage Articles is designed to give you a view of all your articles across all categories and publishing statuses.

You can sort and filter it, and you can export any view in Manage Articles to CSV.

From here, you can open individual articles for editing, delete articles individually or in bulk, and edit articles in bulk.

Let's take a quick look to get oriented. To access your Manage Articles dashboard, in the top section of the lefthand navigation, select Manage.

Manage Articles

All Non Deleted <sup>1</sup> [Create New Filter](#) <sup>2</sup>  <sup>3</sup> Articles per page: <sup>10</sup> [20](#) [50](#) [100](#)

[Edit](#) <sup>4</sup> [Bulk Edit](#) <sup>5</sup> [Archive](#) <sup>6</sup> [Delete](#) <sup>7</sup> [Export Articles to CSV](#)

<input type="checkbox"/>	Article Name <sup>9</sup>	Status	Category	Visibility	Author	Last Modified	Date Created
<input type="checkbox"/>	Recent bug fixes	DRAFT			Kate Mueller	06/15/2021 3:49 pm	06/15/2021 3:36 pm
<input type="checkbox"/>	World Elder Abuse Awareness Day Bug Fixes	PUBLISHED			Kate Mueller	06/15/2021 10:04 am	06/15/2021 9:06 am
<input type="checkbox"/>	Nat'l Iced Tea Day  bug fixes	PUBLISHED			Kate Mueller	06/15/2021 9:43 am	06/10/2021 3:41 pm
<input type="checkbox"/>	Secure file library: now with direct authentic...	PUBLISHED			Kate Mueller	06/15/2021 9:43 am	06/02/2021 10:04 am
<input type="checkbox"/>	Feature enhancement: View & copy version ...	PUBLISHED			Kate Mueller	06/15/2021 9:43 am	06/02/2021 9:48 am
<input type="checkbox"/>	Nat'l Say Something Nice Day bug fixes	PUBLISHED			Kate Mueller	06/15/2021 9:43 am	06/01/2021 11:20 am
<input type="checkbox"/>	How do I get my default home page back?	NEEDS REVIEW			KnowledgeOwl...	06/15/2021 9:31 am	08/22/2017 7:36 pm
<input type="checkbox"/>	Indexing	PUBLISHED			KnowledgeOwl...	06/02/2021 3:47 pm	11/07/2018 6:07 pm
<input type="checkbox"/>	Transition checklist: from Modern Widget to ...	NEEDS REVIEW			KnowledgeOwl...	06/02/2021 11:27 am	04/13/2020 1:34 pm
<input type="checkbox"/>	Customize the widget look and feel	PUBLISHED			KnowledgeOwl...	06/02/2021 11:25 am	10/01/2019 8:58 am
<input type="checkbox"/>	Widget authentication--when and how to use it	PUBLISHED			KnowledgeOwl...	06/02/2021 11:23 am	10/02/2019 2:08 pm
<input type="checkbox"/>	Customize widget contact form	NEEDS REVIEW			KnowledgeOwl...	06/02/2021 11:21 am	11/13/2019 2:33 pm
<input type="checkbox"/>	Requiring login to view files/images	PUBLISHED			KnowledgeOwl...	06/02/2021 10:04 am	07/12/2015 11:58 am

A sample Manage Articles view

Here are the main elements and controls:

1. The filter dropdown at the top allows you to select a filter of articles to display. You can use the dropdown here to select [standard filters](#) or any of the [custom filters](#) you've created.
2. Use the **Create New Filter** button to [create a new filter](#) to be added to the filter selector.
3. You can search the current article list using the search box in the upper right. This will further refine the displayed article list.
4. Once you select one or more articles using the checkboxes, you can [bulk edit](#) the selected articles.
5. Once you select one or more articles using the checkboxes, you can [bulk archive](#) the selected articles.
6. Once you select one or more articles using the checkboxes, you can [bulk delete](#) the selected articles.
7. You can **Export Articles to CSV**. This will [export all pages of the current article list to a CSV](#).
8. The article list will display all articles that meet the selected filter's criteria. You can click on any article here to open it in edit mode in a new tab. You can hover over the category icon to see the category an article is located within.

Manage Articles

All Non Deleted ▼ Create New Filter Search for articles... Q

[Edit](#) [Bulk Edit](#) [Archive](#) [Delete](#) [Export Articles to CSV](#) Articles per page: [20](#) [50](#) [100](#)

<input type="checkbox"/>	<u>Article Name</u>	Status	Release notes	Visibility	Author	<u>Last Modified</u>	<u>Date Created</u>
<input type="checkbox"/>	Recent bug fixes	DRAFT			Kate Mueller	06/15/2021 3:41 pm	06/15/2021 3:36 pm
<input type="checkbox"/>	World Elder Abuse Awareness Day Bug Fixes	PUBLISHED			Kate Mueller	06/15/2021 10:04 am	06/15/2021 9:06 am

9. Clicking any of the underlined column headings will sort the article list by that column:

- **Article Name** (sort this from A to Z or Z to A)
- **Last Modified** (sorted by date - newest to oldest or oldest to newest)
- **Date Created** (sorted by date - newest to oldest or oldest to newest)

10. By default, Manage Articles will display 20 articles at a time. You can toggle this to 50 or 100.

## Use standard Manage filters

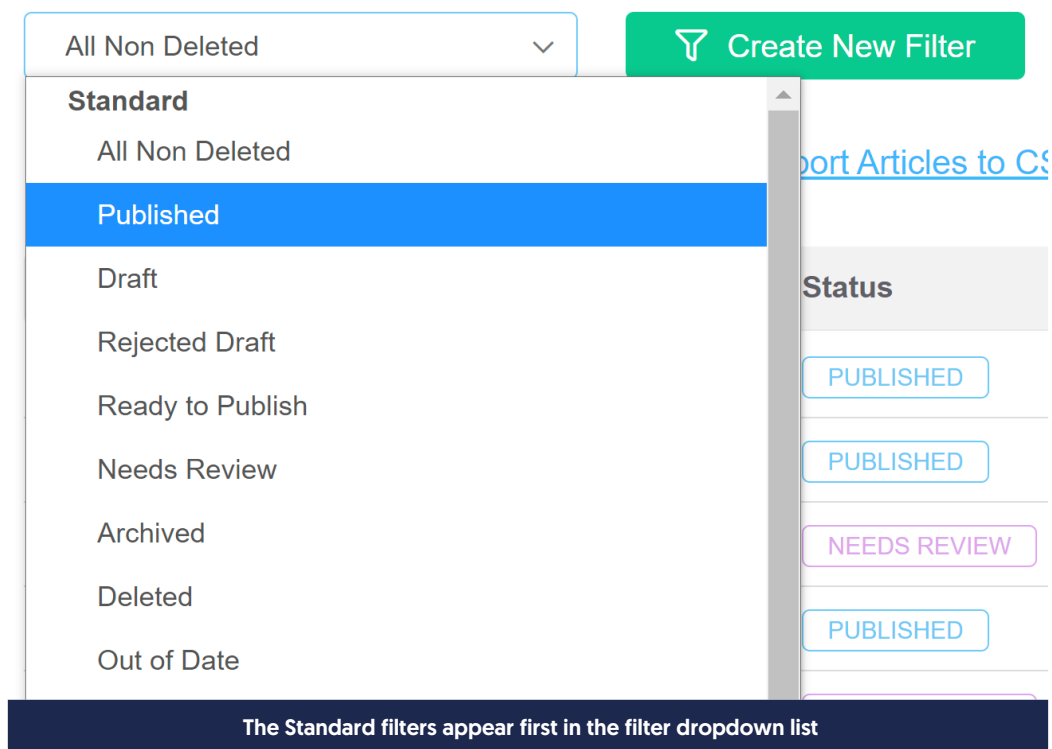
Manage Articles includes eight standard filters, which are generally based on Publishing Status:

- **All Non-Deleted:** displays all articles without a Deleted status
- **Published:** displays all articles with a Published status

- **Draft:** displays all articles with a Draft status
- **Rejected Draft:** displays all articles with a Rejected Draft status
- **Ready to Publish:** displays all articles with a Ready to Publish status
- **Needs Review:** displays all articles with a Needs Review status
- **Archived:** displays all articles with an Archived status
- **Deleted:** displays all articles with a Deleted status in your knowledge base
- **Out of Date:** displays all Published or Needs Review articles that haven't been modified in the last six months

To apply one of these filters:

1. In the top section of the lefthand navigation, select **Manage**.
2. Click the filter selector and click the filter you'd like applied.



## Create a custom Manage filter

In addition to the [Standard Manage filters](#), you can also create your own custom Manage filters. To do so:

1. In the top section of the lefthand navigation, select **Manage**.
2. Select the **Create New Filter** button next to the filter selector.

## Manage Articles

All Non Deleted

Create New Filter

[Edit](#)

[Bulk Edit](#)

[Archive](#)

[Delete](#)

[Export Articles to CSV](#)

### 3. This will open a pop-up where you can select the filter parameters you'd like to use:

Use the settings below to create / edit a filter with which to refine your list of articles.

<b>Name:</b> a <input type="text" value="New Filter"/>	<b>Authors:</b> j <input type="checkbox"/>	<b>Teams:</b> k <input type="checkbox"/> No Teams <input type="checkbox"/>	<b>Status:</b> l <input type="checkbox"/> Needs Review <input type="checkbox"/> Published <input type="checkbox"/> Ready to Publish <input type="checkbox"/> Rejected Draft <input type="checkbox"/> Draft <input type="checkbox"/> Archived <input type="checkbox"/> Deleted	<b>Visibility:</b> m <input type="checkbox"/> Public Only <input type="checkbox"/>
<b>Last Modified:</b> b <input type="text" value="No Filter"/>				
<b>Created:</b> c <input type="text" value="No Filter"/>				
<b>Category:</b> d <input type="text" value="Start typing category name..."/>				
<input type="checkbox"/> Exclude all tagged articles				
<b>Included Tags:</b> f <input type="text"/>				
<b>Excluded Tags:</b> g <input type="text"/>				
<input type="checkbox"/> Versions ready for review				
<input type="checkbox"/> Required reading				

[Cancel](#) [Create Filter](#)

- The **Name** you enter is the label that will appear in the filter selector dropdown.
- Use the **Last Modified** filter to display articles last edited or modified within a particular time range.
- Use the **Created** filter to display articles created within a particular time range.
- Display articles from a specific category only using the **Category** filter. This will include all articles directly within the category or within any subcategories of that category.
- Display articles that don't have any tags by checking the **Exclude all tagged articles** box. This is a great way to identify articles that don't have any tags! Once you check this box, the **Included Tags** and **Excluded tags** filters disappear.
- Display articles that have specific tags using the **Included Tags** filter. These work great if you've used concepts, subject areas, etc., as article **tags**.

- g. Display articles that do not have specific tags by adding those tags to the **Excluded Tags** filter. These work great if you want to find all articles that don't have a "version 1.1" tag, for example.
  - h. If you are using article **versions**, you can check the **Versions ready for review** checkbox to show only articles that have versions with a ready for review status.
  - i. If you are using **Required Reading**, check the **Required reading** checkbox to show only articles that are marked as required.
  - j. By default, the filter will include articles authored by anyone. You can limit it to articles authored by a specific person or people using the **Authors** checkboxes.
  - k. By default, the filter will include articles restricted to specific **author teams** or no author teams. You can limit it to articles restricted to specific author teams using the **Teams** checkboxes.
  - l. By default, the filter will include all articles regardless of Publishing Status. You can limit it to specific publishing status(es) using the **Status** checkboxes.
  - m. By default, the filter will include all articles available to all readers and any reader group. You can limit it to articles viewable to only specific reader groups using the **Visibility** checkboxes.
    - i. **Public Only** will show only articles that have no reader group restrictions whatsoever.
4. Once you have made your selections, select the **Create Filter** button in the lower right to create the filter and view its results.

Here is a sample custom filter called **Settings > Style** which will produce a list of all **Published**, **Needs Review**, and **Ready to Publish** articles that have been assigned the "int: ref-settings-basic" tag and do not have the "int: needs-updated-screenshots" tag:

<p><b>Name:</b></p> <input type="text" value="Settings &gt; Style"/>	<p><b>Authors:</b></p> <input type="checkbox"/> <input type="text"/>	<p><b>Teams:</b></p> <input type="checkbox"/> No Teams <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<p><b>Status:</b></p> <input checked="" type="checkbox"/> Needs Review <input checked="" type="checkbox"/> Published <input checked="" type="checkbox"/> Ready to Publish <input type="checkbox"/> Rejected Draft <input type="checkbox"/> Draft <input type="checkbox"/> Archived <input type="checkbox"/> Deleted	<p><b>Visibility:</b></p> <input type="checkbox"/> Public Only <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<p><b>Last Modified:</b></p> <input type="text" value="No Filter"/>				
<p><b>Created:</b></p> <input type="text" value="No Filter"/>				
<p><b>Category:</b></p> <input type="text" value="Start typing category name..."/>				
<input type="checkbox"/> Exclude all tagged articles				
<p><b>Included Tags:</b> <a href="#">?</a></p> <input type="text" value="int: ref-settings-basic x"/>				
<p><b>Excluded Tags:</b> <a href="#">?</a></p> <input type="text" value="int: needs-updated-screenshots x"/>				
<input type="checkbox"/> Versions ready for review <input type="checkbox"/> Required reading				

## Edit a custom Manage filter

To view the details of an existing custom filter or edit it:

1. In the top section of the lefthand navigation, select **Manage**.
2. Select the filter from the filter dropdown.

## Manage Articles

All Non Deleted

**Standard**

- All Non Deleted
- Published
- Draft
- Rejected Draft
- Ready to Publish
- Needs Review
- Archived
- Deleted
- Out of Date

**Custom**

- 2015 Needs Review
- Since Last 6 Months
- Subscription published
- Reader Profile Filter
- Subscription Filter
- Article Editor references
- Snippet Library
- Basic Settings references
- Settings > Style**
- Needs updated screenshots

Create New Filter

Delete Export Articles to CSV

Status

PUBLISHED

PUBLISHED

PUBLISHED

PUBLISHED

PUBLISHED

PUBLISHED

PUBLISHED

PUBLISHED

PUBLISHED

PUBLISHED

PUBLISHED

PUBLISHED

PUBLISHED

PUBLISHED

3. Select the **Edit Filter** button that appears to the right of the filter dropdown.

## Manage Articles

Settings > Style

Edit Filter Create New Filter

Edit Bulk Edit Archive Delete Export Articles to CSV

4. Make the changes in the filter's details and then select the **Update Filter** button.

The screenshot shows a filter configuration interface with the following sections:

- Name:** Input field containing "Settings > Style".
- Last Modified:** Dropdown menu set to "No Filter".
- Created:** Dropdown menu set to "No Filter".
- Category:** Input field with placeholder "Start typing category name...".
- Authors:** A list of authors with checkboxes, currently empty.
- Teams:** A list of teams with checkboxes, currently empty.
- Status:** A list of status options:
  - Needs Review
  - Published
  - Ready to Publish
  - Rejected Draft
  - Draft
  - Archived
  - Deleted
- Visibility:** A list of visibility options:
  - Public Only
  - (Other options are blurred)
- Included Tags:** A list of tags with a search icon and a help icon. One tag is selected: "int: ref-settings-basic".
- Excluded Tags:** A list of tags with a search icon and a help icon. One tag is selected: "int: needs-updated-screenshots".
- Other options:**
  - Exclude all tagged articles
  - Versions ready for review
- Bottom right:** "Delete Filter" (disabled), "Cancel" (blue link), and "Update Filter" (green button). A red arrow points to the "Update Filter" button.

## Included Tags vs. Excluded Tags

When you're [creating or editing a Manage filter](#), there are two options for [tag filters](#):

- **Included Tags**
- **Excluded Tags**

The **Included Tags** filter makes sure that the filter returns only articles that **have** (or include) the selected tags. For example, if I add the Included Tag for "subscriptions", I'll get a list of all articles with the subscriptions tag.

The **Excluded Tags** filter will remove (or exclude) articles that have the selected tags. For example, if I add the Excluded Tag of "settings", I will get all articles that do not have the settings tag.

For both filters, multiple tags are treated as "or" filters:

- 2 or more tags in **Included Tags** will give you all articles that have any one of the tags. For example, if I add Included Tags for "subscriptions" and "settings", I'll get all articles that have either (or both) of those tags.
- 2 or more tags in **Excluded Tags** will exclude articles that have any one of the tags. For example, if I add Excluded Tags for "needs-updated-screenshots" and "needs content review", I will get all articles that don't have either of those tags.

These two filters are incredibly powerful if you use them together.

For example, let's say that we've made updates to our [Basic Settings page](#). We have a tag in our content for that page ("int: ref-settings-basic"), so I can start off my filter by adding that tag as an Included Tag, to get a list of all articles that reference this page:



Use the settings below to create / edit a filter with which to refine your list of articles.

<p><b>Name:</b></p> <input type="text" value="Settings &gt; Style"/>	<p><b>Authors:</b></p> <input type="checkbox"/>	<p><b>Teams:</b></p> <input type="checkbox"/> No Teams	<p><b>Status:</b></p> <input checked="" type="checkbox"/> Needs Review <input checked="" type="checkbox"/> Published <input checked="" type="checkbox"/> Ready to Publish <input type="checkbox"/> Rejected Draft <input type="checkbox"/> Draft <input type="checkbox"/> Archived <input type="checkbox"/> Deleted	<p><b>Visibility:</b></p> <input type="checkbox"/> Public Only
<p><b>Last Modified:</b></p> <input type="text" value="No Filter"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
<p><b>Created:</b></p> <input type="text" value="No Filter"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
<p><b>Category:</b></p> <input type="text" value="Start typing category name..."/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/> Exclude all tagged articles	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
<b>Included Tags:</b>				
<input type="text" value="int: ref-settings-basic x"/>				
<b>Excluded Tags:</b>				
<input type="text"/>				
<input type="checkbox"/> Versions ready for review				
<input type="checkbox"/> Required reading				

[Cancel](#) [Create Filter](#)

**Sample filter with single Included Tag**

This filter basically says: pull all articles with the "int: ref-settings-basic" tag with a status of Needs Review, Published, or Ready to Publish.

It returns 23 articles.

A lot of our content on Basic Settings talks about setting up a private domain, which we use a separate tag for ("int: ref-private-domain"). If we haven't made updates to that functionality, I'd like to filter out all content that references the private domain setup. I can add that tag as an Excluded Tag:

Use the settings below to create / edit a filter with which to refine your list of articles.

<p><b>Name:</b></p> <input type="text" value="Settings &gt; Style"/>	<p><b>Authors:</b></p> <input type="checkbox"/>	<p><b>Teams:</b></p> <input type="checkbox"/> No Teams	<p><b>Status:</b></p> <input checked="" type="checkbox"/> Needs Review <input checked="" type="checkbox"/> Published <input checked="" type="checkbox"/> Ready to Publish <input type="checkbox"/> Rejected Draft <input type="checkbox"/> Draft <input type="checkbox"/> Archived <input type="checkbox"/> Deleted	<p><b>Visibility:</b></p> <input type="checkbox"/> Public Only
<p><b>Last Modified:</b></p> <input type="text" value="No Filter"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
<p><b>Created:</b></p> <input type="text" value="No Filter"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
<p><b>Category:</b></p> <input type="text" value="Start typing category name..."/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/> Exclude all tagged articles	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
<b>Included Tags:</b>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
<input type="text" value="int: ref-settings-basic x"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
<b>Excluded Tags:</b>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
<input type="text" value="int: ref-private-domain x"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/> Versions ready for review	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/> Required reading	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>

[Cancel](#) [Create Filter](#)

**Sample filter with Included Tag and Excluded Tag**

This filter now says: pull all articles with the "int: ref-settings-basic" tag, that don't have the "int: ref-private-domain" tag, with a status of Needs Review, Published, or Ready to Publish.

This narrows my list of articles down to 18, which means my content audit can go a lot faster.

I could further refine this to exclude additional tags.

## Recommended uses

The Included Tags and Excluded Tags filters become more powerful the more consistently you use tags. They can be a valuable auditing tool if you're using tags for things like:

- **Product version/release information** - If you add tags for each version or release, you can pull documentation specific to some versions and not others
- **Policy/procedure version information** - If you add tags for specific policies and procedures (or revisions of those policies and procedures), you can pull documentation specific to certain versions of policies or procedures
- **Reviewer/Subject Matter Expert (SME) information** - If you add tags for designated reviewers or SMEs, you can pull documentation relevant to a specific reviewer or SME

## Delete a custom Manage filter

 **Deleting a filter will not delete any of the articles in the filter. If you'd like to delete articles, use**



the checkboxes next to the articles and the [Delete](#) option near the top.

To delete a custom Manage filter:

1. In the top section of the lefthand navigation, select **Manage**.
2. Select the filter you'd like to delete from the dropdown.

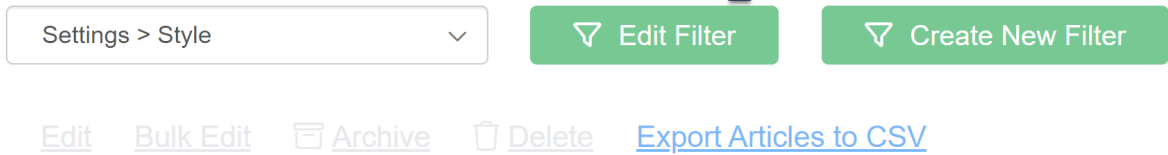
## Manage Articles

The screenshot shows the 'Manage Articles' interface. At the top, there is a dropdown menu currently displaying 'All Non Deleted'. A blue arrow points to the dropdown arrow icon. To the right of the dropdown is a green button labeled 'Create New Filter'. Below the dropdown, a list of filters is shown, categorized into 'Standard' and 'Custom'. The 'Settings > Style' filter is highlighted in blue, with a blue arrow pointing to it. To the right of the filter list, there are buttons for 'Delete' and 'Export Articles to CSV'. Below this is a table with a 'Status' column and several rows, each containing a 'PUBLISHED' button.

Status
PUBLISHED
PUBLISHED
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PUBLISHED

3. Select the **Edit Filter** button.

## Manage Articles



4. In the filter details screen, check the box next to **Delete Filter**.

5. Then select the **Update Filter** button.

The screenshot shows the filter details screen. It has several sections: 'Name' (Settings > Style), 'Last Modified' (No Filter), 'Created' (No Filter), 'Category' (Start typing category name...), 'Included Tags' (int: ref-settings-basic), 'Excluded Tags' (int: needs-updated-screenshots), and 'Versions ready for review'. There are five columns of filters: 'Authors' (Catherine Heath, David Reinert, Deborah Barnard, James Kashevov, Kate Mueller, Kate Recordings, KnowledgeOwl Support, Marybeth Alexander, Pete Grigg, Sonja Ceri), 'Teams' (No Teams, Team C, Team A, Team Z), 'Status' (Needs Review, Published, Ready to Publish, Rejected Draft, Draft, Archived, Deleted), and 'Visibility' (Public Only, Agents, Service Desk Students, Executive Team, Fake Draft, SF Group1, SF Group2, KO Test, HR, Partner A). At the bottom right, there are three buttons: 'Delete Filter' (checked), 'Cancel', and 'Update Filter'. Arrows point to the 'Delete Filter' and 'Update Filter' buttons.

Your filter will be deleted.

## Export the Manage Articles list to CSV

Once you've generated your article list, you can export that list to CSV. There are a few advantages to using the CSV export:

- CSV exports can act like Excel-styled reports on the number of articles you have, who authored them, and so on.
- The CSV export includes far more columns and information than the Manage Articles display shows. These can be useful for detailed audits of permissions, publishing status, and so on.

- CSV exports include the full available article list, so if you have a lot of articles in your filter, you don't have to deal with paging through them.
- They can provide great master lists to share for audits, updates, reporting, etc.

The CSV export will include all articles that match the current filter, so be sure you have the filter you'd like selected before you begin:

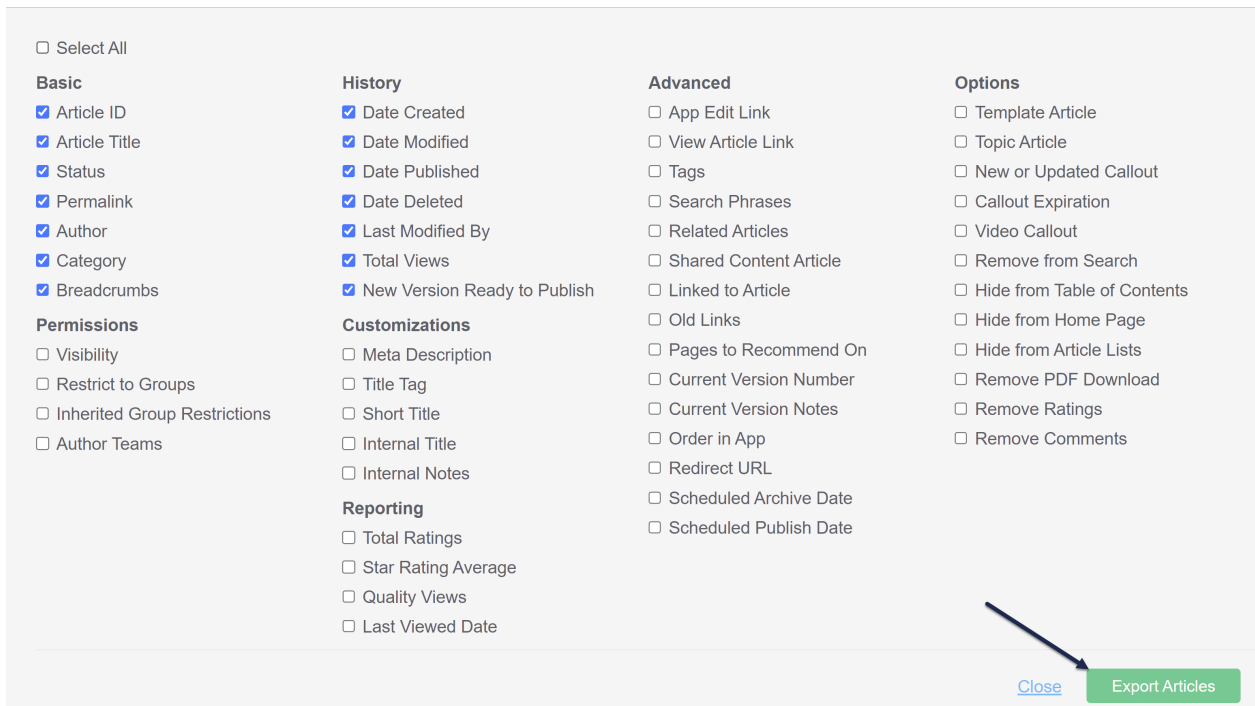
1. Select the **Export Articles to CSV** link.

## Manage Articles



2. This will slide open a panel with checkboxes for you to select which columns you want to include in your export. Anything with a check will be included.

3. Once you've made your column selections, click the **Export Articles** button.



4. Very large exports may take a couple minutes to generate; most will generate in under two minutes. You'll know when an export has generated because the "Generating Export" message will change to a **Download Export** link. Select this link to download your CSV:

Select All

<p><b>Basic</b></p> <p><input checked="" type="checkbox"/> Article ID</p> <p><input checked="" type="checkbox"/> Article Title</p> <p><input checked="" type="checkbox"/> Status</p> <p><input checked="" type="checkbox"/> Permalink</p> <p><input checked="" type="checkbox"/> Author</p> <p><input checked="" type="checkbox"/> Category</p> <p><input checked="" type="checkbox"/> Breadcrumbs</p> <p><b>Permissions</b></p> <p><input type="checkbox"/> Visibility</p> <p><input type="checkbox"/> Restrict to Groups</p> <p><input type="checkbox"/> Inherited Group Restrictions</p> <p><input type="checkbox"/> Author Teams</p>	<p><b>History</b></p> <p><input checked="" type="checkbox"/> Date Created</p> <p><input checked="" type="checkbox"/> Date Modified</p> <p><input checked="" type="checkbox"/> Date Published</p> <p><input checked="" type="checkbox"/> Date Deleted</p> <p><input checked="" type="checkbox"/> Last Modified By</p> <p><input checked="" type="checkbox"/> Total Views</p> <p><input checked="" type="checkbox"/> New Version Ready to Publish</p> <p><b>Customizations</b></p> <p><input type="checkbox"/> Meta Description</p> <p><input type="checkbox"/> Title Tag</p> <p><input type="checkbox"/> Short Title</p> <p><input type="checkbox"/> Internal Title</p> <p><input type="checkbox"/> Internal Notes</p> <p><b>Reporting</b></p> <p><input type="checkbox"/> Total Ratings</p> <p><input type="checkbox"/> Star Rating Average</p> <p><input type="checkbox"/> Quality Views</p> <p><input type="checkbox"/> Last Viewed Date</p>	<p><b>Advanced</b></p> <p><input type="checkbox"/> App Edit Link</p> <p><input type="checkbox"/> View Article Link</p> <p><input type="checkbox"/> Tags</p> <p><input type="checkbox"/> Search Phrases</p> <p><input type="checkbox"/> Related Articles</p> <p><input type="checkbox"/> Shared Content Article</p> <p><input type="checkbox"/> Linked to Article</p> <p><input type="checkbox"/> Old Links</p> <p><input type="checkbox"/> Pages to Recommend On</p> <p><input type="checkbox"/> Current Version Number</p> <p><input type="checkbox"/> Current Version Notes</p> <p><input type="checkbox"/> Order in App</p> <p><input type="checkbox"/> Redirect URL</p> <p><input type="checkbox"/> Scheduled Archive Date</p> <p><input type="checkbox"/> Scheduled Publish Date</p>	<p><b>Options</b></p> <p><input type="checkbox"/> Template Article</p> <p><input type="checkbox"/> Topic Article</p> <p><input type="checkbox"/> New or Updated Callout</p> <p><input type="checkbox"/> Callout Expiration</p> <p><input type="checkbox"/> Video Callout</p> <p><input type="checkbox"/> Remove from Search</p> <p><input type="checkbox"/> Hide from Table of Contents</p> <p><input type="checkbox"/> Hide from Home Page</p> <p><input type="checkbox"/> Hide from Article Lists</p> <p><input type="checkbox"/> Remove PDF Download</p> <p><input type="checkbox"/> Remove Ratings</p> <p><input type="checkbox"/> Remove Comments</p>
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[Download Export](#) [Close](#) [Export Articles](#)

5. Select Close in the lower right to collapse the export options.

## Tips & tricks

We've seen customers use the Manage Articles CSV export in a variety of ways, but here are some of our favorite tricks:

- **Reviewing knowledge base layout:** To review which articles are located in all of your categories, include the **Category** and **Breadcrumbs** columns. **Category** will show you the article's direct parent category; **Breadcrumbs** will show you the article's full table of contents hierarchy.
- **Auditing reader group restrictions:** If you'd like to export a list of articles to review which articles are viewable by certain groups, or which are restricted vs. public, include the **Restrict to Groups** and the **Inherited Group Restrictions** columns. **Restrict to Groups** will show you reader group restrictions that have been assigned to the individual article; **Inherited Group Restrictions** will show you reader group restrictions that the article has inherited from the category or categories it's in.
- **Viewing articles by clicking a link in the CSV:** If you'd like someone who views the CSV to be able to open articles directly from the spreadsheet, consider using the **App Edit Link** and **View Article Link** columns. **App Edit Link** includes the `app.knowledgeowl.com` link that will open the article in edit mode; **View Article Link** provides the URL of the article as it appears to your knowledge base readers.
- **Reviewing shared/synchronized content:** If you have articles that link and synchronize their content with other articles, consider using the **Shared Content Article** and **Linked to Article** columns. **Shared Content Article** will show links to individual articles in the same knowledge base; **Linked to Article** will show links to articles in other knowledge bases.
- **Redirects:** There are two ways articles can involve redirects: an article can be set up as a URL redirect article (which will take someone to another website entirely, usually used for resources outside of KnowledgeOwl), and redirecting an old article permalink to a new one (useful when you've deleted old articles or renamed them and you want to be sure existing links don't break). You can audit for each of these types of redirects;

the **Redirect URL** field will capture URLs entered for **URL redirect** articles, and the **Old Links** field will capture any **old links** added for the article.

## Bulk edit articles in Manage

Bulk Edit Articles ×

---

**1** Publishing Status:

**2** Author:

**3** Update Article Callouts:

- Keep Current Status
- No Status
- NEW Article Status
- UPDATED Article Status

**4** Restrict to Groups:

- Keep Current Restrictions
- None
- 
- 
- 
- 
- 
- 

**5** Add Options:

- Exclude from search results
- Hide from table of contents
- Hide from landing page
- Hide from article lists
- Add to required reading ?

**6** Versions:

- Activate next version marked ready for review

**11** Add Tags:

This is additive only. Tags will not be removed from articles.

[Cancel](#) Update Articles

### The Manage Articles > Bulk Edit options

In Manage Articles, you can **Bulk Edit** articles in a few ways:

1. **Change the Publishing Status** for all selected articles (e.g. set these articles to **Published** status)
2. **Change the Author** for all selected articles (e.g. set these articles to have yourself as the author)
3. **Update Article Callouts** to add **New or Updated callouts** to articles. Useful for triggering **subscription notification emails** and adding New/Updated callouts in your table of contents. This section has four options:
  - **Keep Current Status:** the article callout field won't be touched during the bulk edit
  - **No Status:** Overwrites any existing status to set the selected articles to **No Status**.
  - **New Article Status:** will assign the **New** article callout to selected articles. If selected, the status expiration date field will display and will use your knowledge base's default callout expiration, which you can manually override, just as in Article Editor.

### Update Article Callouts:

- Keep Current Status
- No Status
- NEW Article Status
- UPDATED Article Status

### Status Expiration:

01/22/2024

Sample display when the New callout is selected. Note the Status Expiration date field is now shown.

- o **Updated Article Status:** will assign the Updated article callout to selected articles. If selected, the status expiration date field will display and will use your knowledge base's default callout expiration, which you can manually override, just as in Article Editor.
  
- 4. Change the explicitly-assigned reader group restrictions for all selected articles [e.g. restrict these articles to your "Administrator" reader group; or set these articles to have no reader group restrictions using None]
  - a. **Keep Current Restrictions** will guarantee that no other groups are added to the content, even if boxes below that have been checked.
  
  - b. **None** will remove any explicitly assigned reader group restrictions from the articles. To remove **inherited reader group restrictions**, edit the category **that's adding the restriction**.
  
  - c. Checking boxes next to any of the reader groups in the list will overwrite any reader group restrictions added to the article and replace them with the group(s) who's boxes you've checked.
  
- 5. Set all selected articles to **Exclude from search results**. (There is no way to bulk edit/undo this to include them, so use with caution!)
  
- 6. Set all selected articles to **Hide from table of contents**. (There is no way to bulk edit/undo this to show in the table of contents, so use with caution!)
  
- 7. Set all selected articles to **Hide from landing page** (home or category landing page). (There is no way to bulk edit/undo this to show in the table of contents, so use with caution!)
  
- 8. Set all selected articles to **Hide from article lists**. (There is no way to bulk edit/undo this to show in the table of contents, so use with caution!)
  
- 9. Set all the selected articles to be **required**. This option only displays if **Required Reading** is enabled. Once selected, a **Start Date** field will appear so you can set the **Start Date** of the articles' required status (which is required for it to properly display to readers as required!)



Add to required reading [?](#)

Start Date:

10/05/2023

October 2023						
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

10. For selected articles with versions marked "Ready for review," **activate the next ready for review version.**

11. Add **tags** to all selected articles (e.g. add "needs-update" tag to these articles) -- Note: this will only add tags to the articles; it will not remove or overwrite any existing tags they might already have



All Bulk Edits to articles will update the **Last Modified** date for the articles selected.

Our default **Editor** and **Writer** roles have permission to bulk edit articles. If you're using a **custom author role**, that role must have the Article **Permission to Edit articles in bulk** to bulk edit articles.

To make these kinds of bulk edits:

1. In the top section of the lefthand navigation, select **Manage**.
2. Use the checkboxes to select the articles you'd like to edit. To make your selection, you can:
  - Select individual checkboxes to select only specific articles:

## Manage Articles

All Non Deleted ▼ Create New Filter

[Edit](#) [Bulk Edit](#) [Archive](#) [Delete](#) [Export Articles to CSV](#)

<input type="checkbox"/> Article Name	Status	Category
<input type="checkbox"/> Recent bug fixes	DRAFT	
<input checked="" type="checkbox"/> World Elder Abuse Awareness Day Bug Fixes	PUBLISHED	
<input checked="" type="checkbox"/> Nat'l Iced Tea Day 🧊🍵 bug fixes	PUBLISHED	
<input checked="" type="checkbox"/> Secure file library: now with direct authentic...	PUBLISHED	
<input type="checkbox"/> Feature enhancement: View & copy version ...	PUBLISHED	

**Bulk edit selected articles**

- **Select all articles on the page using the checkbox in the header:**

Manage Articles

All Non Deleted ▼ Create New Filter Search for articles... Q

[Edit](#) [Bulk Edit](#) [Archive](#) [Delete](#) [Export Articles to CSV](#) Articles per page: 20 50 100

<input checked="" type="checkbox"/> Article Name	Status	Category	Visibility	Author	Last Modified	Date Created
All 20 articles on this page selected. <a href="#">Select all 1378 articles that match the current filter</a>						
<input checked="" type="checkbox"/> Publishing status	PUBLISHED		👁	KnowledgeOwl ...	04/17/2024 10:51 am	07/12/2015 2:16 am
<input checked="" type="checkbox"/> Customize Text: New custom role permission	PUBLISHED		👁	Kate Mueller	04/17/2024 10:36 am	04/17/2024 10:31 am
<input checked="" type="checkbox"/> Reset a customized text string	PUBLISHED		👁	KnowledgeOwl ...	04/17/2024 10:30 am	01/03/2023 2:19 pm
<input checked="" type="checkbox"/> Add or edit your own text string	PUBLISHED		👁	KnowledgeOwl ...	04/17/2024 10:30 am	01/03/2023 2:17 pm

**Bulk edit all articles on the current page**

- **Select all articles in the current filter view (all pages) by checking the box in the header and clicking the "Select all xxx articles that match the current filter" link. This will select all articles in the view you've selected, regardless of pagination:**

Manage Articles

All Non Deleted ▼ Create New Filter Search for articles... Q

[Edit](#) [Bulk Edit](#) [Archive](#) [Delete](#) [Export Articles to CSV](#) Articles per page: 20 50 100

<input checked="" type="checkbox"/> Article Name	Status	Category	Visibility	Author	Last Modified	Date Created
All 20 articles on this page selected. <a href="#">Select all 1378 articles that match the current filter</a>						
<input checked="" type="checkbox"/> Publishing status	PUBLISHED		👁	KnowledgeOwl ...	04/17/2024 10:51 am	07/12/2015 2:16 am
<input checked="" type="checkbox"/> Customize Text: New custom role permission	PUBLISHED		👁	Kate Mueller	04/17/2024 10:36 am	04/17/2024 10:31 am
<input checked="" type="checkbox"/> Reset a customized text string	PUBLISHED		👁	KnowledgeOwl ...	04/17/2024 10:30 am	01/03/2023 2:19 pm
<input checked="" type="checkbox"/> Add or edit your own text string	PUBLISHED		👁	KnowledgeOwl ...	04/17/2024 10:30 am	01/03/2023 2:17 pm

**Bulk edit all articles in the current filter**

When all in filter is selected, you'll see a different message across the top, saying "All xxx articles that match the current filter selected." You can undo this by selecting the **Clear selection** link that appears.

3. With your articles selected, select the **Bulk Edit** link above the article list.

## Manage Articles

All Non Deleted ▼ Create New Filter

[Edit](#) [Bulk Edit](#) [Archive](#) [Delete](#) [Export Articles to CSV](#)

<input type="checkbox"/>	Article Name	Status	Category
<input type="checkbox"/>	Recent bug fixes	DRAFT	
<input checked="" type="checkbox"/>	World Elder Abuse Awareness Day Bug Fixes	PUBLISHED	
<input checked="" type="checkbox"/>	Nat'l Iced Tea Day   bug fixes	PUBLISHED	
<input checked="" type="checkbox"/>	Secure file library: now with direct authentic...	PUBLISHED	
<input type="checkbox"/>	Feature enhancement: View & copy version ...	PUBLISHED	

Select the articles you'd like to edit and click the Bulk Edit link

4. Select the changes you'd like to make in the Bulk Edit Articles pop-up.

5. Once you've finished selecting the bulk edits you'd like to apply, select the **Update Articles** button in the lower right to make the edits.

**Publishing Status:**

Needs Review

**Author:**

Keep Current Author

**Update Article Callouts:** Keep Current Status No Status NEW Article Status UPDATED Article Status**Restrict to Groups:** Keep Current Restrictions None**Add Options:** Exclude from search results Hide from table of contents Hide from landing page Hide from article lists Add to required reading ?**Versions:** Activate next version marked ready for review**Add Tags** Type tag name and hit enter or tab...

*This is additive only. Tags will not be removed from articles.*

[Cancel](#)[Update Articles](#)

Select the bulk edits you'd like to make and click the Update Articles button

In the screenshot above, I'm setting all the selected articles to a "Needs Review" status and adding the "int: needs-updated-screenshots" tag. The "No Status" in Update Article Callouts will ensure that none of these articles have a New or Updated callout, even if one did previously exist. No other changes will be made.



See [How do bulk edits/deletes work?](#) for more information on what you can expect to see during a bulk edit. See [Bulk activating "ready for review" versions](#) for more information on using the "Activate next version marked ready for review" option.

## Bulk activate "ready for review" versions

As part of the bulk editing options, you can also choose to "Activate next [version](#) marked ready for review." If you have a lot of versions that need to go "live" at the same time, as part of a release or policy update, this can be a great way to activate them all at the same time.



We recommend also setting the Updated Article Callout when you activate a new version, but that step is totally optional!

**Publishing Status:**

Keep Current Status

**Author:**

Keep Current Author

**Update Article Callouts:** Keep Current Status No Status NEW Article Status UPDATED Article Status**Status Expiration:**

01/22/2024

**Restrict to Groups:** Keep Current Restrictions None**Add Options:** Exclude from search results Hide from table of contents Hide from landing page Hide from article lists Add to required reading ?**Versions:** Activate next version marked ready for review**Add Tags**

Type tag name and hit enter or tab...

*This is additive only. Tags will not be removed from articles.*[Cancel](#)[Update Articles](#)**Check the box to Activate next version marked ready for review****To access this screen:**

1. In the top section of the lefthand navigation, select **Manage**.
2. Check the boxes next to the articles you'd like to bulk activate.
3. Select the **Bulk Edit** link to open the pop-up in the screenshot above.
4. Check the box next to "Activate next version marked ready for review."
5. *Optional:* If you use **Article callouts**, this is a great time to add the Updated article callout, too, as shown in the screenshot above!
6. Select the **Update Articles** button to complete the activation.

If you're unfamiliar with bulk editing, see [Bulk editing articles in Manage](#) for more details on steps 1-3.

"Activate next version marked ready for review" will check the selected articles. If any of them are articles with

multiple versions, and one of those versions is marked as "Ready for review", it will automatically set that version to be active. If the articles have no versions currently ready for review, they'll simply be re-saved.

So, for example, if we bulk edit this article to activate the next version:

The screenshot shows a 'Versions' panel with a list of article versions. The versions are listed from top to bottom: 5.02, 5.01, 5.00, 4.01, 4.00, 3.00, and 1.00. Each version has a plus icon and a trash icon to its right. Version 5.00 has an orange 'READY TO REVIEW' button. Version 4.00 has a 'VIEWING' button and a green 'ACTIVE' button. At the bottom of the list is an 'Add version' button with a dropdown arrow. A dark blue banner at the bottom of the panel contains the text: 'Sample versions with one ready to review: version 5.00 will be activated'.

After the bulk edit completes, version 5.00 will be the current active version.

For the publishing status, that activated version will:

- If Keep Current Status is used, the version will inherit whatever publishing status the article already has overall.
- If you've selected a specific publishing status in the bulk edit screen, the newly-activated version will receive that publishing status.

### **If I have multiple versions marked ready for review, which version gets activated?**

If an article has *multiple* revisions in a ready for review state, such as in this example:

**Versions** ^

<u>5.02</u>		+ 🗑️
<u>5.01</u>		+ 🗑️
<u>5.00</u>	READY TO REVIEW	+ 🗑️
<u>4.01</u>	VIEWING READY TO REVIEW	+ ⋮
<u>4.00</u>		ACTIVE +
<u>3.00</u>		+ 🗑️
<u>1.00</u>		+ 🗑️

Add version | ▾

Article with two versions marked ready to review before bulk activation. Version 5.00 will be activated.

The most recent/newest version marked ready for review will be activated and the Ready to Review flag will be removed from the other versions.

So in this example, once we bulk edit to activate versions, version 5.00 will be the current active version and 4.01 will no longer be marked ready to review:

**Versions** ^

<u>5.02</u>		+ 🗑️
<u>5.01</u>		+ 🗑️
<u>5.00</u>	VIEWING ACTIVE	+
<u>4.01</u>		+ 🗑️
<u>4.00</u>		+ 🗑️
<u>3.00</u>		+ 🗑️
<u>1.00</u>		+ 🗑️

Add version | ▾

Same article after bulk activation



For this reason, we don't recommend marking multiple versions as ready for review at the same time if you're using bulk activation. If multiple ready versions makes sense for your workflow, we recommend manual activation of versions.

## Bulk edit articles to make them required reading

If you have multiple articles you'd like to mark as required, you can either choose to edit them individually or you can use the **Bulk Edit** feature in **Manage** to mark them all required at once.

To bulk edit multiple articles to mark them as required:

1. In the top section of the lefthand navigation, select **Manage**.
2. If necessary, use a Standard or Custom filter and/or search to display the articles you want to mark as required.
3. Check the boxes next to the articles you'd like to mark as required.
4. Select the **Bulk Edit** link.

### Manage Articles

All Non Deleted ▼ Create New Filter

[Edit](#) [Bulk Edit](#) [Archive](#) [Delete](#) [Export Articles to CSV](#)

<input type="checkbox"/>	<u>Article Name</u>	Status	Category
<input type="checkbox"/>	Recent bug fixes	DRAFT	
<input checked="" type="checkbox"/>	World Elder Abuse Awareness Day Bug Fixes	PUBLISHED	
<input checked="" type="checkbox"/>	Nat'l Iced Tea Day   bug fixes	PUBLISHED	
<input checked="" type="checkbox"/>	Secure file library: now with direct authentic...	PUBLISHED	
<input type="checkbox"/>	Feature enhancement: View & copy version ...	PUBLISHED	

5. In the Bulk Edit Articles pop-up, in the **Add Options** section, check the box next to **Add to required reading**.



6. Once you check the box, a Start Date field will appear. Use the date picker to select the date you'd like to use as the Start Date for the required reading. (When all else fails, use today's date!)

Add to required reading ?

Start Date:

10/05/2023

October 2023						
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

7. Make any other bulk edit selections you'd like.
8. Once you've done making your selections, select the **Update Articles** button to begin the bulk edit.

Once your bulk edit is complete, all articles you selected will be marked as Required and have the Start Date set to whatever date you selected.



You cannot set articles in topic display categories or URL redirect articles to be required. Bulk Edits on these articles won't go through.

For more information on all the options in the Bulk Edit pop-up, see [Bulk editing articles in Manage](#).

## Archive articles in bulk in Manage

Our default **Editor** and **Writer** roles have permission to archive articles. If you're using a [custom author role](#), that role must have the Article [Permission to Archive articles](#) to bulk archive articles.

You can archive multiple articles at once using **Manage Articles**. To do so:

1. In the top section of the lefthand navigation, select **Manage**.
2. Use a filter or search to display the articles you'd like to archive.
3. Check the box next to each article you'd like to archive. (Or use the checkbox in the header to select all)

displayed articles/all articles in filter.)

4. Select the **Archive** link just above the article list.

Manage Articles

All Non Deleted ▼ Create New Filter

[Edit](#) [Bulk Edit](#) [Archive](#) [Delete](#) [Export Articles to CSV](#)

<input type="checkbox"/>	Article Name	Status	Category
<input type="checkbox"/>	Recent bug fixes	DRAFT	
<input checked="" type="checkbox"/>	World Elder Abuse Awareness Day Bug Fixes	PUBLISHED	
<input checked="" type="checkbox"/>	Nat'l Iced Tea Day  bug fixes	PUBLISHED	
<input checked="" type="checkbox"/>	Secure file library: now with direct authentic...	PUBLISHED	
<input type="checkbox"/>	Feature enhancement: View & copy version ...	PUBLISHED	

Select the articles you'd like to archive and then click the Archive link

5. A confirmation message will appear, identifying how many articles you've selected to archive. Select **OK** to archive the articles you selected.

Are you sure you want to archive the 3 selected articles? ×

Cancel OK

Select OK to confirm the archive

Once the articles are archived, if you need to view or edit them, select **Archived** from the filter dropdown at the top to view a full list of archived articles:

## Manage Articles

The screenshot shows the 'Manage Articles' interface. At the top, there is a filter dropdown menu currently set to 'All Non Deleted'. A green button labeled 'Create New Filter' is to its right. Below the dropdown, a list of filter options is shown: 'Standard', 'All Non Deleted', 'Published', 'Draft', 'Rejected Draft', 'Ready to Publish', 'Needs Review', 'Archived' (highlighted in blue), 'Deleted', and 'Out of Date'. To the right of the dropdown, there are links for 'Delete' and 'Export Articles to CS'. Below these links is a 'Status' section with a 'PUBLISHED' button. At the bottom of the screenshot, a dark blue banner contains the text: 'Use the Deleted filter to view deleted articles'.

## Delete articles in bulk in Manage

Our default **Editor** and **Writer** roles have permission to delete articles. If you're using a [custom author role](#), that role must have the Article [Permission to Delete articles](#) to bulk delete articles.

### Deleting an article will:

- Remove it completely from your live knowledge base (the table of contents, category landing pages, search results, article lists)
- Show a 404 page when someone navigates to the article's URL, unless you've set up an [old link](#) to redirect to a different page.
- Delete all view data for the article. This data will not be recovered if you recover the article and will disappear from the [Popular Articles Report](#).
- Remove it from the Articles hierarchy (though you can still find it in the **Manage > Deleted** filter)

You can delete multiple articles at once using Manage Articles. To do so:

1. In the top section of the lefthand navigation, select **Manage**.
2. Use a filter or search to display the articles you'd like to delete.
3. Check the box next to each article you'd like to delete. (Or use the checkbox in the header to select all displayed articles/all articles in filter.)
4. Select the **Delete** link just above the article list.

## Manage Articles

All Non Deleted ▼ Create New Filter

[Edit](#) [Bulk Edit](#) [Archive](#) [Delete](#) [Export Articles to CSV](#)

<input type="checkbox"/>	Article Name	Status	Category
<input type="checkbox"/>	Recent bug fixes	DRAFT	
<input checked="" type="checkbox"/>	World Elder Abuse Awareness Day Bug Fixes	PUBLISHED	
<input checked="" type="checkbox"/>	Nat'l Iced Tea Day 🧊🍹 bug fixes	PUBLISHED	
<input checked="" type="checkbox"/>	Secure file library: now with direct authentic...	PUBLISHED	
<input type="checkbox"/>	Feature enhancement: View & copy version ...	PUBLISHED	

Select the articles you'd like to delete and then click the Delete link

5. A confirmation message will appear, identifying how many articles you've selected to delete. Select OK to delete the articles you selected.

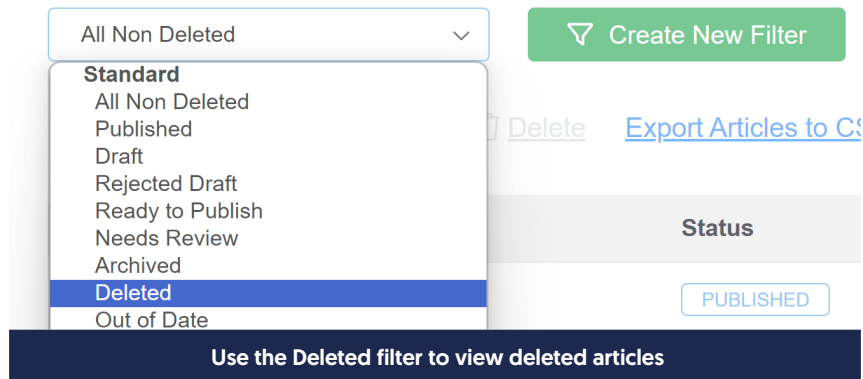
Are you sure you want to delete the 2 selected articles? ×

Cancel OK

Select OK to confirm the delete

Once the articles are deleted, if you need to view or edit them, selected Deleted from the filter dropdown at the top to view a full list of deleted articles:

## Manage Articles



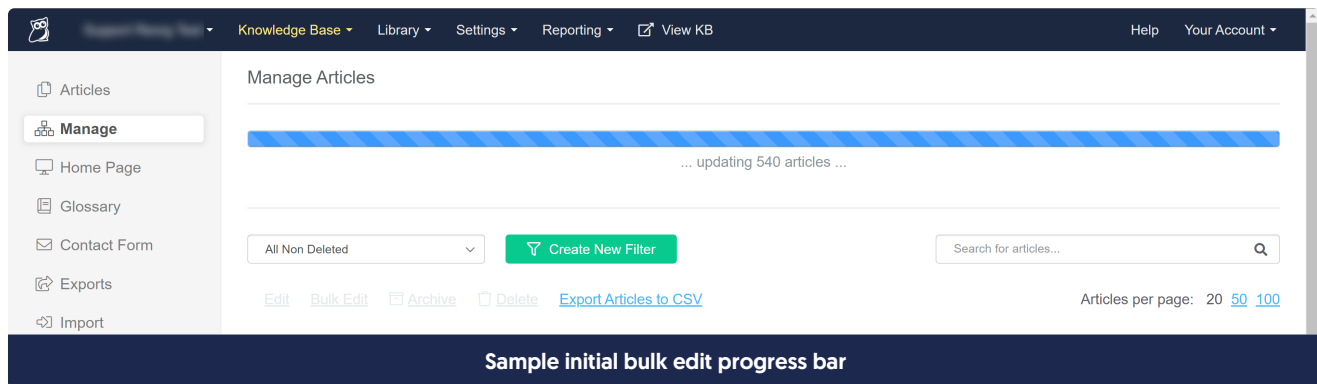
## How do bulk edits, archives, and deletes work?

In Manage Articles, the number of articles being edited, archived, or deleted and the type of bulk edit influence how long a bulk edit takes:

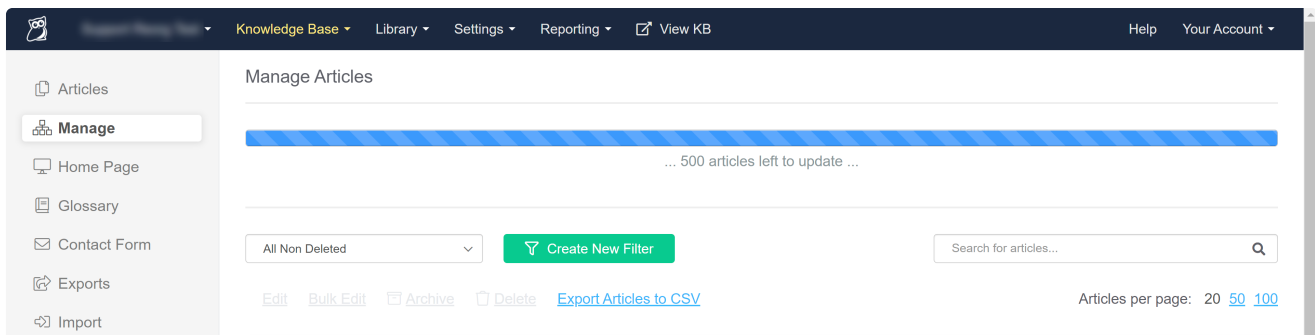
- Bulk edits to **add tags** complete fairly quickly, regardless of how many articles are selected.
- Selecting articles and clicking the **Delete** link completes fairly quickly, regardless of how many articles are selected.
- All other bulk edit types take longer, and will take longer the more articles you've selected.

Bulk edits, archives, and deletes for 9 or fewer articles will load almost instantly, regardless of the type of edit.

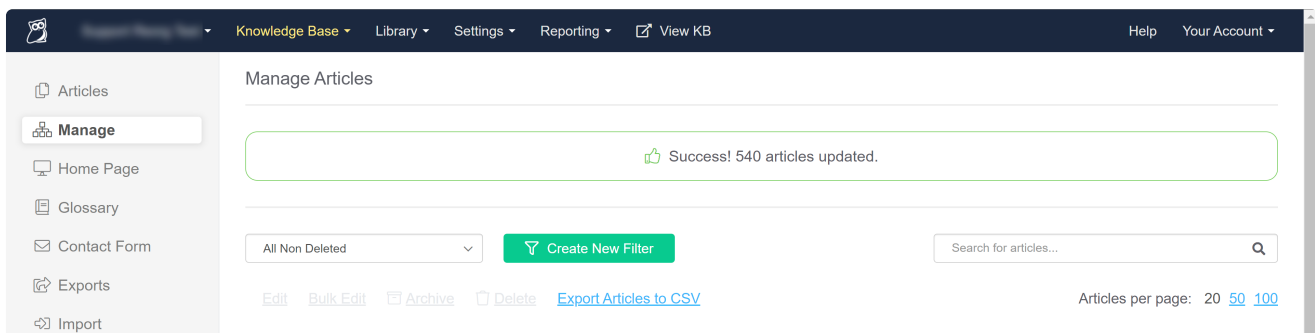
For bulk edits, archives, and deletes for 10 or more articles, you'll see a progress bar shown across the top of the screen, letting you know how many articles remain:



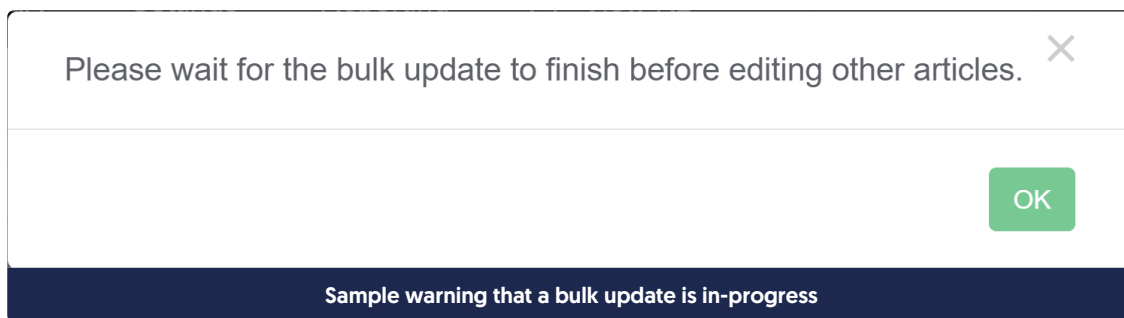
The remaining articles countdown will update in chunks of 50 (so in this example starting with 540 articles, it will say 540, 500, 450, etc.), so that you can get a sense for how many articles remain:



Once the action is complete, the progress bar disappears and a confirmation message is displayed:



You can only run one bulk edit at a time. With the progress bar present, if you try to select other things, you'll get a warning letting you know a bulk update is in progress:



Once the update is complete, you can run another.