Readers page overview

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A reader is anyone who can view your knowledge base. You can have unlimited readers for your knowledge bases. You can also create **Reader Groups** to segment readers and show different content to different readers.

> Authors with **Full Admin Access** or **Admin access to readers** admin rights can view and edit reader accounts.

To view a complete list of all your readers, go to **Account > Readers** (or **Security and access > Readers**). The Readers page opens to the **Readers** tab.

The Readers page has three tabs:

1. Use the **Readers** tab to view a list of all your readers. Here you can create new readers, view and edit existing readers, search readers, export a list of readers to CSV, and purge deleted readers. Refer to the more detailed sections below for more information on using the Readers tab.

2. Use the **Groups** tab to view a list of all your reader groups. Here you can create, edit, delete, and reorder your **reader groups**. You can also set any **Auto-assign groups by email rules** you'd like to use for those groups if you aren't using **Single Sign-On (SSO)**. Refer to **Reader Groups** for more information on using the Groups tab.

3. Use the **Settings** tab to view and edit account-wide settings for readers. Here you can set password complexity and management, set up **self-administered reader options** like sign-up and approval, customize the **reader email** templates (including welcome and password reset), and configure **custom SMTP** to send those emails. Refer to **Reader emails**, **Reader security, passwords, and login options**, and **Reader signups** for more information on using the Settings tab.

The Readers tab

Below, we walk through an orientation of the page and all you can do here, splitting the page into three sections:

- **General reader controls** at the top of the page
- **Reader action controls** between the general controls and the reader list
- **Reader list controls**

General reader controls

Most of the controls near the top of the page are general reader controls that change which readers are displayed (filters and searches) or that you can use to create new readers singly or in bulk:

1. Use the **filter dropdown** to select different Standard or Custom reader filters, which will update the readers list and the CSV export below. The app will remember the last filter you viewed. The Standard filters are:

   - **Active** (the initial default): Shows all non-deleted readers in your account, regardless of login method

   - **Pending Approval:** Shows readers who have signed up for access to your knowledge base but haven't been approved. This filter is only relevant for accounts using **reader signups** requiring approval. Refer to **Approve new reader signups** for information on approving readers.

   - **SSO Readers:** Shows all readers who are designated as logging in through a **Single Sign-On (SSO) integration**.

   - **Non-SSO Readers:** Shows all readers not designated as using a KnowledgeOwl-maintained reader account, rather than through an SSO integration. Passwords and group membership for these readers are managed fully within KnowledgeOwl.

   - **Deleted:** Shows all the deleted readers in your account. **Purge deleted reader accounts** to clean up this filter.

2. Use **Create new filter** to **create new custom filters**.

3. Use **Import Readers from Spreadsheet** to import a spreadsheet to **create multiple new reader accounts** at once.

4. Use **Add Single Reader** to **create a reader**.

5. **Search** within the selected filter, which will further refine the list of readers to match your search term. You can search for:

   a. A full email address, for example `linus@knowledgeowl.com` .

   b. The reader's First Name (`Linus`), Last Name (`Owl`) or full Name (`Linus Owl`).

   c. The email domain, for example: `knowledgeowl.com` **or** `@knowledgeowl.com` .

   d. The email start, for example: `linus` .

   e. The Readers Search doesn't support partial searches, like `lin` .

6. Use **Export Readers to CSV** to export the current displayed list of readers to a CSV file. This can be useful for auditing who has access to which knowledge bases, and so forth.

Reader action controls

The reader action controls are links that become active once you check the box next to one or more readers from the reader list. Use these controls to perform actions on the selected reader accounts:

The reader action controls detailed below

1. Select **Edit** to open the reader details for a single reader only. This option is unavailable if you've selected multiple readers.

2. Select **Bulk Edit** to change the selected readers' status, reader groups, and/or site access. Refer to **Edit readers in bulk** for more detailed instructions on using this option.

3. **Approve** readers whose access is pending or denied. Previously pending readers will receive a reader welcome email once approved. Refer to **Approve or deny multiple readers** for more detailed instructions on using this option.

4. **Deny** readers whose access is pending or approved. This cuts off their access to all knowledge bases in their **Site Access**. Refer to **Approve or deny multiple readers** for more detailed instructions on using this option.

5. **Delete** readers whose accounts shouldn't exist. This cuts off their access to all knowledge bases in their **Site Access** and moves them to the Deleted reader filter. To permanently and fully remove their details from your account, follow the instructions to **Purge deleted readers**.

Reader list controls

The reader list displayed below all the controls is the real powerhouse of this page. Here you can view and sort the list, control how many readers display per page, and navigate between pages:

The reader list controls explained below

1. The **Login** column displays the reader's username/email. Select the column header to sort alphabetically, select again to toggle between ascending and descending order.

2. The **Name** column displays the reader's full name, formatted as: Last Name, First Name. Select the column header to sort alphabetically, select again to toggle between ascending and descending order.

3. The **Site Access** column displays the knowledge bases the reader can access.

4. The **Groups** column displays the **reader groups** assigned to the reader.

5. The **Last Activity** column shows the last time the reader was active in your knowledge base. Select the column header to sort by date, select again to toggle between ascending and descending order.

6. Use the **Readers per page** controls to toggle between 20, 50, or 100 readers displayed per page.

7. If your readers list runs onto multiple pages, use the **More** and **Back** buttons to cycle between the pages.