SSO options for different knowledge base setups

Last modified on 11/07/2026 12:01 pm EST

Choose which type of SSO setup you'd like more information on:

- Restrict entire knowledge base to SSO: Readers must log in via SSO in order to see any page in your knowledge base.
- Restrict only some content to SSO: Some of your knowledge base is publicly available without logging in; any restricted content requires a reader to log in via SSO in order to see it.
- Restrict entire knowledge base with dual login options: All readers must log in, but they can log in through either SSO or KnowledgeOwl-native reader logins. This is useful if you have a mixed audience, like some employees and some customers, and don't use SSO for both.

In this article, SSO means SAML or OpenID Connect (OIDC). The steps are the same for both: you make the changes in **Security and access > Access & SSO**, on the SAML or OpenID Connect page. For a tour of that page, refer to Access & SSO page overview.

This feature is available on select plans.



Prerequisite
In order to test SSO in KnowledgeOwl, you must first configure your SSO integration. View our list of available setup instructions, or refer to Configure OpenID Connect SSO.

Restrict entire knowledge base to SSO

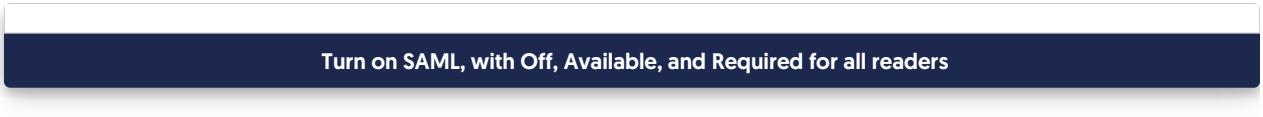
With this setup, nothing in your knowledge base can be accessed without someone logging in through your SSO integration.

To guarantee your knowledge base is only accessible through SSO, follow these setup instructions:

Require SSO for all readers

1. Go to **Security and access > Access & SSO**.
2. In the **Login methods** section, select **Set up** or **Manage** next to **SAML** or **OpenID Connect (OIDC)**.
3. Open the last step, **Turn on SAML** or **Turn on OpenID Connect**, and select **Required for all readers**.

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4. Select **Save changes**.

Back on the **Access & SSO** overview, the **Who can read this knowledge base?** section now says readers who aren't logged in are sent to SAML or OpenID Connect. You don't need to change anything else there.

Another method already required?
If another login method is already required, you'll be asked to confirm. When more than one method is required, SAML takes priority over OpenID Connect, then Salesforce SSO, then remote authentication. The other methods still work through their own login links.

Test to confirm your changes

The expected behavior here is that anyone hitting any page in your knowledge base will be directed to your identity provider's login page. To test this behavior:

1. From within KnowledgeOwl, select **View knowledge base**.
2. Copy the URL this opens.
3. Paste that URL into a different browser, incognito window, or private window. You should be redirected to the IdP for authentication.
4. After authenticating, in KnowledgeOwl, go to **Security and access > Readers** to ensure the reader was properly created with all the mapped attributes.

Are you logged in as an author?
If you authenticate through your IdP with the same email as your KO author, you will be authenticated as the author and not a reader. You can tell you're logged in as an author if you see the dark editor bar at the top of the knowledge base to **Add content**, **Edit [page]**, and **View as**.

Restrict only some content to SSO

In this setup, some of your knowledge base is public, while the content that's private requires login through SSO.

To ensure your knowledge base is set up this way, follow these setup instructions:

Make SSO available

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1. Go to **Security and access > Access & SSO**.
2. In the **Login methods** section, select **Set up** or **Manage** next to **SAML** or **OpenID Connect (OIDC)**.
3. Open the last step, **Turn on SAML** or **Turn on OpenID Connect**, and select **Available**.
4. Select **Save changes**.

Choose who can read and where readers log in

1. Select **Access & SSO** in the breadcrumb at the top of the page to return to the overview.
2. In **Who can read this knowledge base?**, select **Public**.
3. In the **Login methods** section, set **Send readers who aren't logged in to** to **SAML login** or **OpenID Connect login**.

   The Login methods section of the Access & SSO overview
4. Select **Save changes**.

Make sure the Log in link displays

With **Send readers who aren't logged in to** set to **SAML login** or **OpenID Connect login**, the **Log in** link in your knowledge base header sends readers there. To be sure the link displays:

1. Go to **Customize > Style (HTML & CSS)**.
2. In the **Customize HTML, CSS, and JS** section, select **Custom HTML**.
3. In **Select HTML section to edit**, select **Top Navigation**.
4. Make sure you have the login template code if you want a login button:

   ```
   [template("login")]
   ```

Test to confirm your changes

The expected behavior here is that anyone can open public pages, and anyone opening restricted content will be directed to your identity provider's login page. To test this behavior:

1. From within KnowledgeOwl, select **View knowledge base**.
2. Copy the URL this opens.

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3. Paste that URL into a different browser, incognito window, or private window. You should be able to access the homepage with no issues.
4. From within KnowledgeOwl, find an article or category that's restricted to a reader group. Select **View article** or **View category**.
5. Copy the URL this opens.
6. Paste that URL into a different browser, incognito window, or private window. You should be redirected to the IdP for authentication.
7. After authenticating, in KnowledgeOwl, go to **Security and access > Readers** to ensure the reader was properly created with all the mapped attributes.



Are you logged in as an author?
If you authenticate through your IdP with the same email as your KO author, you will be authenticated as the author and not a reader. You can tell you're logged in as an author if you see the dark editor bar at the top of the knowledge base to **Add content**, **Edit [page]**, and **View as**.

Restrict entire knowledge base with dual login options

With this setup, your entire knowledge base requires login, but readers can log in either through SSO or using KnowledgeOwl-native reader logins. This is useful if you have a mixed audience, like some employees and some customers, and don't use SSO for both.

First, decide which login page readers who aren't logged in should see. Choose the one that the majority of your readers will use, then follow the matching instructions.

Option 1: Send readers to the reader login page

1. Go to **Security and access > Access & SSO**.
2. In **Who can read this knowledge base?**, select **Logged-in readers only**.
3. Select **Save changes**.
4. In the **Login methods** section, select **Set up** or **Manage** next to **SAML** or **OpenID Connect (OIDC)**.
5. Open the last step, **Turn on SAML** or **Turn on OpenID Connect**, and select **Available**.
6. Select **Save changes**.

Readers who aren't logged in go to the reader login page. Readers can log in with SSO using its login link, which

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you'll find on the SAML or OpenID Connect page.

Option 2: Send readers to SSO

1. Go to **Security and access > Access & SSO**.
2. In the **Login methods** section, select **Set up** or **Manage** next to **SAML** or **OpenID Connect (OIDC)**.
3. Open the last step, **Turn on SAML** or **Turn on OpenID Connect**, and select **Required for all readers**.
4. Select **Save changes**.
5. Select **Access & SSO** in the breadcrumb to return to the overview.
6. In the **Login methods** section, select **Set up** or **Manage** next to **Direct login**.
7. Select **Allow direct log ins while SAML is required** (or **Allow direct log ins while OpenID Connect is required**).
8. Select **Save changes**.

Readers who aren't logged in are sent to your identity provider, and readers can still log in with their username and password at the reader login page.

Optional: Add link to secondary login page

Readers who aren't logged in are automatically directed to the login page you chose above.

For whichever login page you use as the default, you may want to add a link for your readers to jump to the other login page.

For example, if you send readers to SSO, have your developers include a link to the standard KnowledgeOwl /readerlogin page on your identity provider's login page. If you send readers to the reader login page, you can add HTML to this page to add a hyperlink to your SAML or OpenID Connect **Login link**:

1. Go to **Customize > Style (HTML & CSS)**.
2. In the **Customize HTML, CSS, and JS** section, select **Custom HTML**.
3. In **Select HTML section to edit**, select **Login**.
4. Add HTML here to add a hyperlink to your SAML or OpenID Connect login link.
5. Be sure to **Save** your changes.

Test to confirm your changes

The expected behavior here is that anyone hitting any page in your knowledge base will be directed to the login

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page you chose. To test this behavior:

1. From within KnowledgeOwl, select **View knowledge base**.
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3. Paste that URL into a different browser, incognito window, or private window. You should be redirected to whichever login page you chose.
4. After authenticating, in KnowledgeOwl, go to **Security and access > Readers** to ensure the reader was properly created with all the mapped attributes.



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