



Reader signups

Last Modified on 12/05/2024 1:34 pm EST

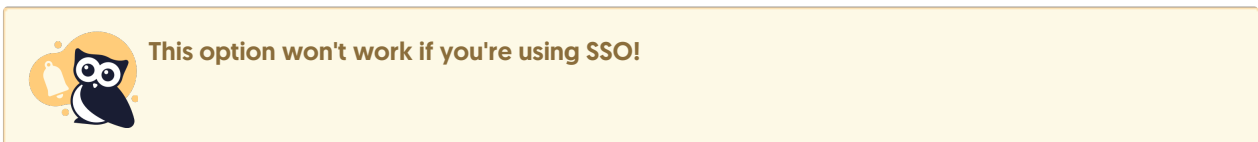
If your knowledge base is set up so that some or all readers must login to see content and you're using KnowledgeOwl reader accounts rather than an [SSO integration](#), you can allow your readers to sign up for access. This can help reduce administrative time and oversight so that readers can request access without you having to manually create accounts for them.

With signups enabled, your login page will show a link for new visitors to sign up for access:

Sample login page with a signup link

You have several options when adding signups:

- You can have new sign-ups **automatically granted** a reader account as soon as they sign up OR **require an admin to approve their access**
- You can choose to **send email notifications** when a new reader has signed up
- You can include up to five **custom fields** to gather additional information about readers when they sign up
- You can **auto-assign new reader signups** to reader groups based on their email address domain



Enable reader signups

To enable reader signups:

1. Select your profile icon/name in the upper right.
2. Select **Readers** from the dropdown to access the Readers area of your account.
3. Open the **Settings** tab.
4. Make sure that **Password Management** is set to "Allow readers to administer their own passwords". See [Set up self-administered reader options](#) for more information. If "Passwords can only be managed by KnowledgeOwl admins" is selected, you cannot enable reader signups.

The screenshot shows the 'Settings' tab selected in a navigation bar with 'Readers' and 'Groups' options. Below the navigation bar is the 'Reader Password Security' section. A rounded rectangle highlights the 'Password Management' settings. The 'Allow readers to administer their own passwords' option is selected with a blue radio button. Below this option is the text: 'Any existing readers will be forced to change their password on next login.' Below the highlighted area are two other settings: 'Password Attempts' with an unchecked checkbox for 'Allow unlimited password attempts', and 'Author Logins' with a checked checkbox for 'Allow KnowledgeOwl authors to log in as readers'. At the bottom of the settings area is a dark blue banner with white text: 'Signups can be used when "Allow readers to administer their own passwords" is selected'.

5. Scroll down to the **Self-Administered Reader Options** section.
6. Look for the **Reader Signups** section.

Self-Administered Reader Options

Password Expiration Interval

Repeat Password Limitations

Custom Validation Rule

Passwords will not be allowed that do not match the above regex

Custom Validation Description

Message will be displayed on password reset screen.

Auto-Assign Group Rules Override reader groups based on rule logic on each login

Allow Google Sign In Allow readers to log in using their Google account

To use, additional information is required for each knowledge base. Go to Settings → Security and fill out the Google integration settings.

Reader Signups Allow people to sign up to become a reader

Require a KnowledgeOwl admin to approve new reader access

Send a notification email when a new reader signs up

Signup Notification Recipients

For multiple email addresses, use a comma separated list.

Save

Signups can be configured in the Reader Signups portion of Self-Administered Reader Options

7. To turn on reader signups, check the box next to **Allow people to sign up to become a reader.**



Spam protection

The reader signup page doesn't have its own spam protection settings; it inherits them from the Contact Form. We're working to add a separate setting for this. Until that's released, please make sure you have spam protection turned on in the [Contact Form](#) to block spam on your reader signups!

8. If you'd like readers to automatically be given an account as soon as they sign up, leave the box next to **Require a KnowledgeOwl admin to approve new reader access** unchecked. If you'd like to require admin approval, check this box.

- If you leave this box unchecked, new reader signups will receive a welcome email with a temporary password immediately after they sign up. This allows new readers to sign up and gain access to your site without any approval process.
- If you check this box, a welcome email and password will not be sent until an administrator approves the signup request. New readers won't have any access until an admin has approved them. When a new reader signs up, they will be added to Readers in the Pending Approval list. You will see an alert

on top of the Readers list if you have new readers awaiting approval, and you can filter the readers list to only view those pending approval by selecting the "Pending Approval" filter on that page.

- See [Approve Reader Signups](#) for more information.

9. If you'd like to be alerted when new readers sign up, check the box next to **Send a notification email when a new reader signs up**. Notifications are especially helpful if you want to manually add the reader to groups to give them access to restricted content or you require approval before the new reader can access the site.
10. If you checked the box next to **Send notification email when a new reader signs up**, be sure to add at least one email address to the **Signup Notification Recipients** list. These are the email addresses that will receive the signup notifications. To add multiple email addresses, use a comma-separated list.
11. Be sure to **Save**.

Change the default text of the reader signup form

You can customize all of the text in the reader signup form using the [Customize Text tool](#), as well as the signup prompt text and link on the main reader login form.

See [Section breakdown: Reader Login](#) for more details on the various text strings you can customize here.

Do you want to capture some additional information besides first name, last name, and email address about your readers? See [Add custom fields to the reader signup form!](#)

Add custom fields to the reader signup form

By default, the reader signup form requires an email, first name, and last name. You can choose to include up to 5 additional fields that will be mapped to reader custom fields 1-5. These fields will be included in the signup and in your notification emails (if you're using notification emails).

Reader Signup Custom Fields

Custom Field 1 Label	Company Name	<input checked="" type="checkbox"/> Enabled	<input checked="" type="checkbox"/> Required
Custom Field 2 Label	Postcode	<input checked="" type="checkbox"/> Enabled	<input type="checkbox"/> Required
Custom Field 3 Label	Address	<input type="checkbox"/> Enabled	<input type="checkbox"/> Required
Custom Field 4 Label	Something	<input type="checkbox"/> Enabled	<input type="checkbox"/> Required
Custom Field 5 Label	Something else	<input type="checkbox"/> Enabled	<input type="checkbox"/> Required

Reader custom fields

To add custom fields to the signup form:

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. Open the **Settings** tab.
4. Scroll down to **Reader Signup Custom Fields** section.
5. Add labels for each field. The labels are what will be displayed on the signup form next to the field.
6. If you want the field to be displayed in your reader signup form, check the **Enabled** box.
7. If you want to require the reader to complete this field before they can submit the signup form, check the **Required** box.
8. Click **Save**.

For example, in the screenshot above, both the **Company Name** and **Postcode** fields will be included, but only the **Company Name** field will be required.

The custom fields will be added to your signup and will also be included in your notification emails:

Signup

Your Email Address:

First Name:

Last Name:

Company Name:

Postcode:

Reader signup form with custom fields

Approve or deny single new reader

When a new reader signs up and you require approval, they will see a message like this:

Your access has been submitted for approval. You will be notified once approval has been completed.

Support Login

Username:

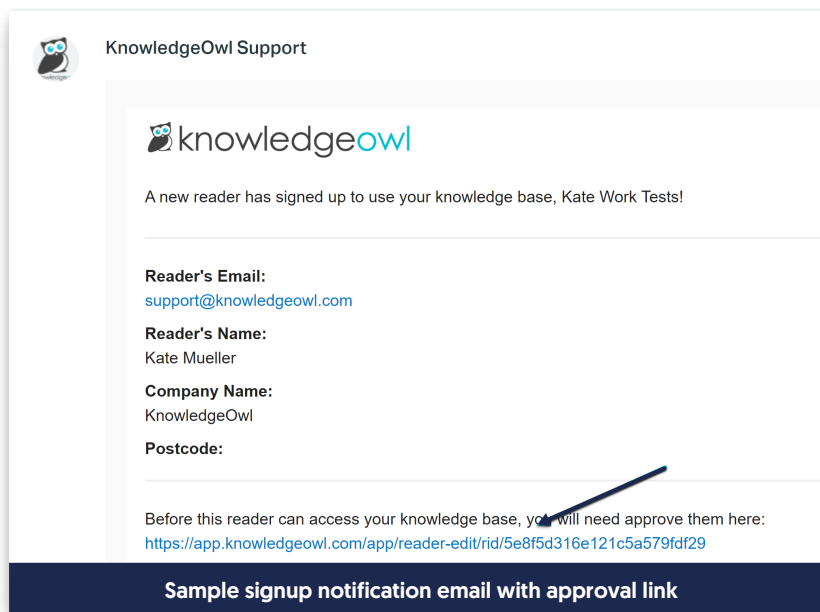
Password:

[Reset Password](#)

Don't have a login? Click [here](#) to sign up.

They will be added to your account's Readers list as pending approval.

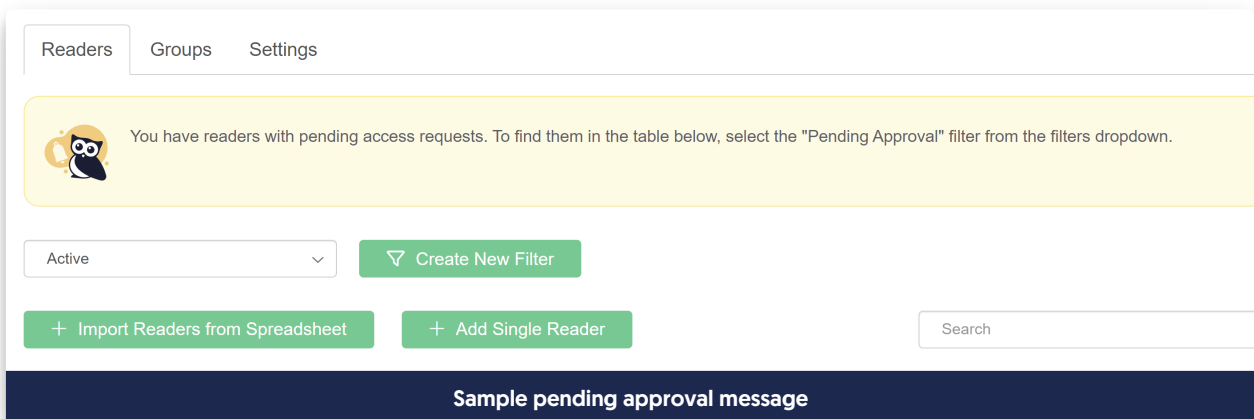
If you have signup notifications enabled, the email you receive will have a link in it to approve the reader:



That will take you directly to step 7 below.

If you aren't using notifications, or if you'd like to complete this step while already logged in to KnowledgeOwl:

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. You will see an alert on top of the Readers list if you have new readers awaiting approval:



4. Click the filter dropdown to select the Pending Approval filter:

Active

- Standard
 - Active
 - Pending Approval**
 - SSO Readers
 - Non-SSO Readers
 - Deleted
- Custom

Create New Filter

+ Add Single Reader

Delete Export Readers to

Select the Pending Approval filter from the dropdown

5. This will display a list of all readers pending approval:

Readers Groups Settings

Pending Approval Create New Filter

+ Import Readers from Spreadsheet + Add Single Reader Search

Edit Bulk Edit Approve Deny Delete Export Readers to CSV Readers per page: 20 50 100

<input type="checkbox"/>	Login	Name	Site Access	Groups	Last Activity
<input type="checkbox"/>	owlbus@knowledgeowl.com	Dumbledore, Owlbus	▲		Never

< Back Viewing 0 - 1 of 1 More >

Sample Pending Approval filter display

6. Click on the reader's login, name, or anywhere else in that row.

7. This will open the reader's details in a new tab.

8. Click on the link that says approve or deny them here:

Edit Reader

Basic reader settings control how a reader logs in (what's their username) and how they appear in the knowledge base (first name, last name, icon). For self-administered passwords, usernames must be emails.

This reader has pending access requests. You can [approve or deny them here](#). You will not be able to edit this reader until you approve or deny their access.

Login / Username owlbus@knowledgeowl.com

Sample approve/deny message in reader details

9. Here you can choose to Deny or Approve their access. If you approve them, their reader account will be

given access and we will send them the [reader welcome email](#) with a temporary password.

Pending Knowledge Base Requests ×

i By selecting knowledge bases below and clicking "Approve Selected", an email will be sent to the reader notifying them that their access has been granted. If they are a brand new reader, the email will include their temporary password.

Support KB

[Deny Selected](#) [Cancel](#) [Approve Selected](#)

10. Once you have approved the reader, you can assign them to reader groups in the **Reader Groups** section.

11. If you do make changes to the reader's details, be sure to **Save** once you complete those changes.

Approve or deny multiple readers

When a new reader signs up and you require approval, they will see a message like this:

Your access has been submitted for approval. You will be notified once approval has been completed.

Support Login

Username:

Password:

[Reset Password](#) [Continue as Guest](#) [Submit](#)

Don't have a login? Click [here](#) to sign up.

They will be added to your **Readers** list as pending approval.

You can approve or deny multiple readers at once. To do so:

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. You will see an alert on top of the Readers list if you have new readers awaiting approval:

The screenshot shows the top of the Readers list interface. At the top, there are tabs for "Readers", "Groups", and "Settings". Below the tabs is a yellow alert banner with an owl icon and the text: "You have readers with pending access requests. To find them in the table below, select the 'Pending Approval' filter from the filters dropdown." Below the alert, there is a filter dropdown menu currently set to "Active", a "Create New Filter" button, and two buttons: "+ Import Readers from Spreadsheet" and "+ Add Single Reader". A search bar is also visible on the right. At the bottom of the screenshot, a dark blue banner reads "Sample pending approval alert".

4. Click the filter dropdown to select the Pending Approval filter:

The screenshot shows the filter dropdown menu open. The dropdown is currently set to "Active". The menu options are: "Standard", "Active", "Pending Approval" (highlighted in blue), "SSO Readers", "Non-SSO Readers", "Deleted", and "Custom". To the right of the dropdown is a "Create New Filter" button and a "+ Add Single Reader" button. Below the dropdown, there are links for "Delete" and "Export Readers to CSV". At the bottom of the screenshot, a dark blue banner reads "Select the Pending Approval filter from the dropdown".

5. This will display a list of all readers pending approval:

The screenshot shows the Readers list interface with the filter set to "Pending Approval". At the top, there are tabs for "Readers", "Groups", and "Settings". Below the tabs, the filter dropdown is set to "Pending Approval", and there is a "Create New Filter" button. Below that are buttons for "+ Import Readers from Spreadsheet" and "+ Add Single Reader", and a search bar. Below the buttons, there are links for "Edit", "Bulk Edit", "Approve", "Deny", "Delete", and "Export Readers to CSV". On the right, it says "Readers per page: 20 50 100". Below this is a table with the following columns: "Login", "Name", "Site Access", "Groups", and "Last Activity". The table contains one row with the following data: "owibus@knowledgeowl.com", "Dumbledore, Owlbus", a blue triangle icon, and "Never". At the bottom, there is a "Back" button, "Viewing 0 - 1 of 1", and a "More" button.

6. Check the boxes next to the readers you'd like to approve or deny.

- a. You can use search here to refine the list, or [create a custom reader filter](#) to get at segments of the pending approval readers.

b. You can also select all readers on the page by using the checkbox in the upper left corner.

The screenshot shows the 'Readers' management interface. At the top, there are tabs for 'Readers', 'Groups', and 'Settings'. Below the tabs, there is a filter dropdown set to 'Pending Approval' and a green button labeled 'Create New Filter'. Below that, there are two more green buttons: '+ Import Readers from Spreadsheet' and '+ Add Single Reader'. A row of action links is visible: 'Edit', 'Bulk Edit', 'Approve', 'Deny', 'Delete', and 'Export Readers to CSV'. An arrow points to the 'Bulk Edit' link. Below the links is a table of readers. The first row is highlighted and has a checked checkbox in the left column. The table has columns for 'Name' and 'Site Access'. The data rows are:

<input checked="" type="checkbox"/>	<u>Login</u>	<u>Name</u> ▲	<u>Site Access</u>
<input checked="" type="checkbox"/>	owlcapone@knowledgeowl.com	Capone, Owl	!
<input checked="" type="checkbox"/>	owlbus@knowledgeowl.com	Dumbledore, Owlbus	!
<input checked="" type="checkbox"/>	beyonce@knowledgeowl.com	KnOWLs, Beyonce	!

c. 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.

The screenshot shows the 'Readers' management interface with a filter set to 'Active'. There are buttons for '+ Import Readers from Spreadsheet' and '+ Add Single Reader', and a search bar. Action links include 'Edit', 'Bulk Edit', 'Approve', 'Deny', 'Delete', and 'Export Readers to CSV'. A message at the top of the table reads: 'All 20 readers on this page selected. [Select all 34 readers that match the current filter](#)'. An arrow points to this link. The table has columns for 'Name', 'Site Access', 'Groups', and 'Last Activity'. Below the table, there are more rows with checkboxes and data, but they are blurred.

d. 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 [Create New Filter](#)

[+ Import Readers from Spreadsheet](#) [+ Add Single Reader](#) Search

[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				

7. With your readers selected, click on the **Approve** or **Deny** link near the **Bulk Edit** option to approve or deny these readers.

Readers Groups Settings

Pending Approval [Create New Filter](#)

[+ Import Readers from Spreadsheet](#) [+ Add Single Reader](#) Search

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

<input type="checkbox"/> Login	Name ^	Site Access	Groups	Last Activity
<input checked="" type="checkbox"/>	owlcapone@knowledgeowl.com	Capone, Owl	Support	Never
<input checked="" type="checkbox"/>	owlbus@knowledgeowl.com	Dumbledore, Owlbus	Support	Never
<input checked="" type="checkbox"/>	beyonce@knowledgeowl.com	KnOWLs, Beyonce		Never
<input type="checkbox"/>	owlpacino@knowledgeowl.com	Pacino, Owl	Support	Never

8. When you Approve readers:

- The knowledge base they requested access to will be listed in the Site Access column.
- They'll be marked with an Active status and appear in the Active filter.
- They'll receive a [reader welcome email](#).

9. When you Deny readers:

- The knowledge base they requested access to will not be listed in the Site Access column.
- They'll be marked with an Active status and appear in the Active filter.
- They will receive no email notification of the denial.
- If the readers have no additional site access, we recommend also Deleting the readers.


10. If you'd like to assign these readers to reader groups or make other changes to their access, we recommend using a [bulk reader edit](#) to update them.

Auto-assign new readers to groups upon signup

If you have [reader sign-ups enabled](#), by default, new reader signups aren't assigned any reader groups. You can create rules to automatically assign readers to groups based on their email domain.

A common use case is to assign all readers with internal email addresses to an internal reader group. For example, Linus likes having a rule that will assign all readers with a `knowledgeowl.com` email address to the **Support** reader group, which gives them access to all content restricted to our Support group.

If you're using reader signup, this can help guarantee that new readers get access to the content they need without a KnowledgeOwl admin having to manually review and assign them to the appropriate groups.

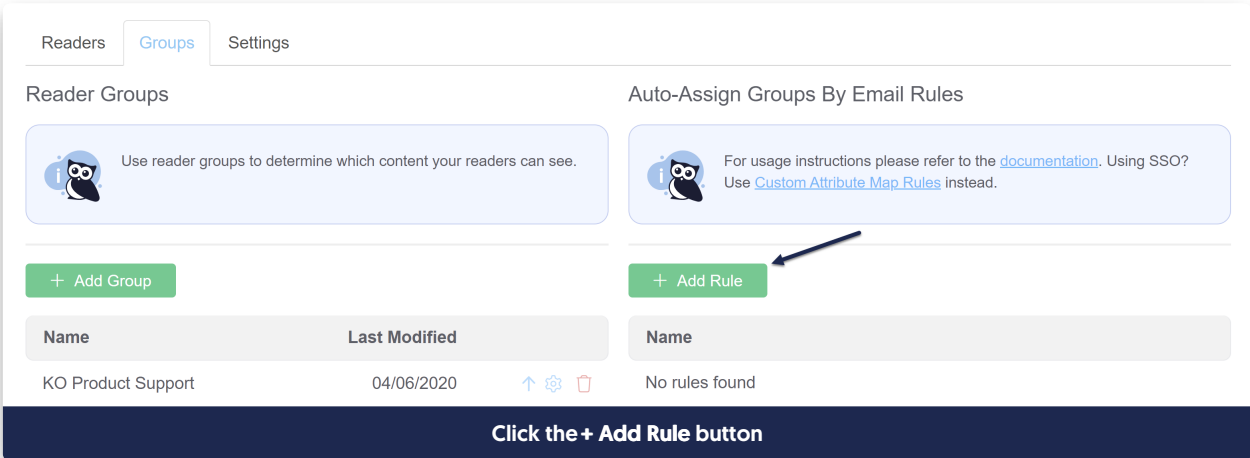


These rules currently apply to readers who have signed up for access to your knowledge base **only**. They do not apply to:

- Reader accounts that you or another KO admin manually creates in your **profile icon/name > Readers (singly or in bulk)**
- Readers who come through remote authentication or any of our SSO integrations. If you are using SSO, see [Auto-Assign Groups By Email Rules \(SSO Edition\)](#) for SSO-specific steps!

To set up Email Rules:

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. Open the **Groups** tab.
4. Select the **+ Add Rule** button.



The screenshot shows the 'Groups' tab selected in the top navigation. Below the navigation are two main sections: 'Reader Groups' and 'Auto-Assign Groups By Email Rules'. The 'Reader Groups' section has a '+ Add Group' button and a table with one entry: 'KO Product Support' with a 'Last Modified' date of '04/06/2020'. The 'Auto-Assign Groups By Email Rules' section has an information icon and text: 'For usage instructions please refer to the [documentation](#). Using SSO? Use [Custom Attribute Map Rules](#) instead.' Below this is a '+ Add Rule' button, which is highlighted by a blue arrow. At the bottom of the interface, a dark blue banner contains the text 'Click the + Add Rule button'.

5. This will open the Auto-Assign Groups By Email Rule pop-up. To set up your rule, include:

Auto-Assign Groups By Email Rule
✕

Rule Name

a Name of Rule

Email Domain

b @

Assign to Groups

c
 Success
 Production
 Support

[Cancel](#)
Save Rule

The Auto-Assign Groups by Email Rule pop-up

- a. A **Rule Name**. This name will appear in the Auto-Assign Groups by Email Rules in Readers > Groups, so it should help describe the rule.
- b. The **Email Domain** the rule applies to: all readers with this email domain will have this rule applied. It must be an entire domain (such as @knowledgeowl.com, @gmail.com, @yourcompany.com, etc.).
- c. Use the **Assign to Groups** checkboxes to select the Reader Group(s) that people with that email domain should be assigned to. This list depends on the [Reader Groups](#) you've set up in your knowledge base.

6. Click **Save Rule** to save your changes. Here, we create a rule that will assign all readers with an @knowledgeowl.com email address to the Support group:

Auto-Assign Groups By Email Rule
✕

Rule Name

KnowledgeOwl support

Email Domain

@

Assign to Groups

Success
 Production
 Support

[Cancel](#)
Save Rule

Sample rule which will assign all readers with an @knowledgeowl.com email address to the Support group

7. Your rule will now appear in the Auto-Assign Groups by Email Rules section of Readers > Groups and will be applied to all reader signups from here on out. You can edit it (gear icon) or delete it (trashcan icon) using the icons to the right of the rule.

Readers Groups Settings

Reader Groups

Use reader groups to determine which content your readers can see.

+ Add Group

Name	Last Modified	
Success	06/14/2023	↑ ⚙️ 🗑️
Production	01/03/2019	↑ ⚙️ 🗑️
Support	09/19/2019	↑ ⚙️ 🗑️

Auto-Assign Groups By Email Rules


For usage instructions please refer to the [documentation](#). Using SSO? Use [Custom Attribute Map Rules](#) instead.

+ Add Rule

Name	
KnowledgeOwl support	⚙️ 🗑️

Sample rule added to Auto-Assign Groups By Email Rules

By default, rules will only be applied when a new reader first signs up.

 To run the rules on subsequent logins and allow rules to affect existing readers, choose "Override reader groups based on rule logic on each login" under Readers > Settings. (Note that changing this setting, though, will override any manually-assigned reader groups for readers in the rule domains, though. We don't recommend using this setting if you're using auto-assigned rules in conjunction with manually-assigned groups!)