Auto-Assign Groups By Email Rules (SSO Edition)

Last Modified on 11/15/2023 1:14 pm EST

You might want to automatically assign reader groups based on a readers' email address. For example, we might want to assign all readers with "@knowledgeowl.com" email addresses to a special Owls Only reader group. If we're using SSO, we can do this using Custom Attribute Map Rules under **Settings > SSO**.

> There is also an option under **Your Account > Readers > Groups** for "Auto-Assign Groups By Email Rules". This does not work with SSO. If you are using SSO, please follow the instructions below to set this up using Custom Attribute Map Rules.

Prerequisites:
- **SSO is set up and working**
- **Email address is being passed over**
- **IdP attribute name for the email address field**

To set up a **Custom Attribute Map Rule** to automatically assign readers to groups based on an email address:

1. Go to **Settings > SSO.**

2. Click on the **SAML Attribute Map** tab.

3. Copy the IdP attribute name for **Username / Email** under **Direct Reader Attribute Map.**

    ○ You will need the IdP attribute name for the email address field. If you are already mapping the email address to a field such as **Username / Email,** this IdP attribute name will be listed in the **Direct Reader Attribute Map.** If you are not sure, you can enable debug mode in order to log in via SSO and view the IdP attribute names being passed over from your IdP.

4. Scroll down to **Custom Attribute Map Rules.**

5. Click on **+ Create New Rule.**

6. Input the **IdP attribute name** that includes the email address.

7. In the **IdP attribute value matching type** section, select **Regex pattern**.

8. Copy the code below and paste it into the **IdP value regex pattern**.

   /.*\@knowledgeowl([\.])com/i

9. Replace knowledgeowl with your email domain (and com with your domain ending, if it's not a .com!). So, for example, if our email domain was owlmazing.net, we would use:

   /.*\@owlmazing([\.])net/i

10. Choose **Reader Groups** from the **Reader attribute** dropdown.

11. Start typing to select the reader group(s) to which you want to assign any SSO readers with matching email addresses. Your pop-up should look something like this:

    Create Advanced SAML Map Rule ✕

    IdP attribute name

    username

    IdP attribute value matching type
    ○ Exact matches ⓘ
    ● Regex pattern ⓘ
    ○ Default ⓘ
    *Only one default is allowed per IdP attribute name

    IdP value regex pattern

    / .*\@knowledgeowl([\.])com   /i

    Reader attribute

    Reader Groups   ⌄

    Assign to reader groups

    ⚌ KO Only (SSO) ✕ | Start typing group name…

    Cancel   Create Rule

    Sample SAML Map Rule

12. Once you've finished adding groups and verified that all information is correct, select the **Create Rule** button.

13. Now any readers who log in with matching email addresses should be automatically assigned to the selected reader group(s).