Auto-Assign Groups By Email Rules (SSO Edition)

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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 in **Security and access > Access & SSO**, in step 3 of the SAML setup, **Map reader attributes**. OpenID Connect (OIDC) has the same **Custom rules** in its own **Map reader attributes** step, so you can follow the same steps there, using claim names instead of IdP attribute names.



Only use this with SSO
There's also an option under **Account > Readers > Groups** to Auto-Assign Groups By Email Rules. That setting doesn't work with SSO reader accounts. If you're using SSO, follow the instructions below!

Before you begin

Before you can make these changes, you'll need to meet these prerequisites:

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

Create your custom attribute map rule

To set up a Custom attribute map rule to automatically assign readers to groups based on an email address:

1. Go to **Security and access > Access & SSO**.
2. In the **Login methods** card, select **Manage** next to **SAML**.
3. Expand step 3, **Map reader attributes**.
4. Copy the IdP attribute name for **Username / email**.
    - If you don't have an email address in **Username / email**, expand step 4, **Test login**, check **Debug mode**, select **Save changes**, and try logging in. Then select **Load last login attempt** to see the IdP attribute names and values being passed over from your IdP.

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5. Below the attribute map, find **Custom rules**. If you don't have any rules yet, select **Set reader fields with rules** to show them.
6. Select **Add rule**. The **Create custom map rule** modal opens for you to define the rule.
7. Enter the **IdP attribute name** that includes the email address.
8. In the **Value matching type** section, select **Regex pattern**.
9. Copy the code below and paste it into the **Regex pattern**:

```
.*\@knowledgeowl([\.])com
```

10. 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
```

11. Select **Reader groups** from the **Reader attribute** dropdown.
12. In **Assign to reader groups**, start typing to select the reader group(s) to which you want to assign any SSO readers with matching email addresses.



Sample custom map rule for email domain

13. Once you've finished adding groups and verified that all information is correct, select **Create rule**. The rule is saved right away.
14. Now any readers who log in with matching email addresses should be automatically assigned to the selected reader group(s).

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