Convert a private knowledge base to mixed public and private

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After having a private knowledge base for a while, you may want to make part of that knowledge base public.

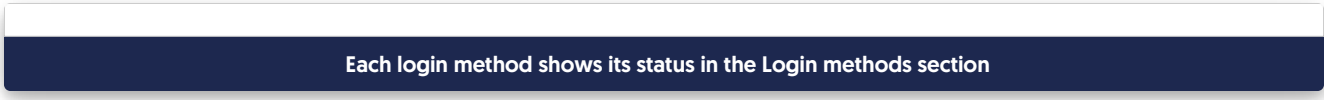
This is a good problem: you're seeing uses for the knowledge base beyond what you originally thought.

If you're in this position, here are the steps we suggest to convert your existing totally-private knowledge base to a mixed public knowledge base.

Identify your current login option(s)

Before you begin, make sure you know all the ways your readers are logging in to your knowledge base, as it impacts the next steps.

There are a few options, and some of these you can use in combination. Most of them show a status in the **Login methods** section of **Security and access > Access & SSO:**



Each login method shows its status in the Login methods section

- **KnowledgeOwl reader accounts** (KO readers)
  To check if you're using KO readers:
  1. Go to **Security and access > Readers** (or **Account > Readers**).
  2. In the dropdown at the top of the page, select **Non-SSO Readers**.
  3. If you have more than a couple test accounts listed here, your knowledge base is using KO Readers.
  4. Refer to KO Readers below for detailed instructions.
- **SAML Single Sign-On** (SAML SSO)
  To check if you're using SAML SSO:
  1. Go to **Security and access > Access & SSO**.
  2. In the **Login methods** section, does **SAML** show **Available** or **Required**? If so, your knowledge base is using SAML SSO.
  3. Refer to SAML SSO, OpenID Connect, or Remote Auth below for detailed instructions.
- **OpenID Connect Single Sign-On** (OIDC SSO)

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To check if you're using OpenID Connect:

1. Go to **Security and access > Access & SSO**.
2. In the **Login methods** section, does **OpenID Connect (OIDC)** show **Available** or **Required**? If so, your knowledge base is using OpenID Connect.
3. Refer to SAML SSO, OpenID Connect, or Remote Auth below for detailed instructions.

- **Salesforce Single Sign-On** (Salesforce SSO)
  To check if you're using Salesforce SSO:
  1. Go to **Security and access > Access & SSO**.
  2. In the **Login methods** section, does **Salesforce SSO** show **Required**, **Available**, or **Needs setup**? If so, your knowledge base has Salesforce SSO turned on.

     

     Unsupported
     Salesforce SSO can't be used in a mixed public/private knowledge base setup. You'll need to create a second knowledge base for your public content, either with standalone or synced content.

- **Remote authentication** (remote auth)
  To check if you're using remote auth:
  1. Go to **Security and access > Access & SSO**.
  2. In the **Login methods** section, does **Remote authentication** show **Required**, **Available**, or **Needs setup**? If so, you might be using Remote Auth. You can fully confirm this a few ways:
     a. If **Remote authentication** shows **Required**, or **Who can read this knowledge base?** is set to **Your own login system (remote authentication)**, you're definitely using remote auth.
     b. If **Send readers who aren't logged in to** is set to **Remote login URL**, you're most likely using remote auth.
     c. Check with whomever set up your knowledge base originally to see if they set up a remote auth script.
  3. Refer to SAML SSO, OpenID Connect, or Remote Auth below for detailed instructions.

KO Readers

Follow these steps if your knowledge base is using KnowledgeOwl readers alone or in combination with other auth types:

1. Create a new reader group for your KO readers.

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2. Use Edit readers in bulk to assign all your current KO readers to that reader group.
3. For future KO reader accounts:
    a. If all your readers are coming from the same domain (like knowledgeowl.com), use Auto-assign groups by email rules to assign future readers to this group.
    b. If your readers come from different domains, you can either:
        i. Manually assign current and future readers to the group. Edit readers in bulk is a good tool for this.
        ii. Set up one Auto-assign groups by email rules for each domain your readers are coming from.
4. Confirm that all current KO readers are assigned to the new reader group.
5. Once all KO readers are assigned to the new group, you can start restricting categories (or articles) that should only be available to logged in readers.
    a. Readers won't notice anything since you're just updating permissions on the back-end and they will continue to have access to the same content.



Pro tip: Use your content organization
It's easiest if you can organize your content by categories, as then you just need to update the top-level categories that need to be behind the login.

6. In **Security and access > Access & SSO**, if the **Images and files** section says **Only logged-in readers can open images and files.**, no images or files will load for public readers. If you plan to have any files displayed in your public content, select **Use public links...** and then **Convert to public links**. Refer to Requiring login to view files/images for more information.
7. In **Security and access > Access & SSO**, under **Who can read this knowledge base?**, select **Public**. Select **Save changes**, then select **Make it public** to confirm.



Look before you leap
Once you make this change and save, any content not restricted to your reader group will be publicly available!

8. Make sure readers have the reader login/logout link. Now that it's public, your readers will need a way to log in again, since the login page won't open by default. In the **Login methods** section, select **Set up** (or **Manage**) next to **Direct login**, select **Available**, and select **Save changes**.
9. Back in **Security and access > Access & SSO**, if you see **Send readers who aren't logged in to** in the **Login**

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methods section, set it to **Reader login page**.

   a. UNLESS you're using KO readers and SAML SSO, OpenID Connect, or Remote Auth, then you may want to use one of the other login methods as the default. Readers with KO reader accounts can still log in at the reader login page.

10. Be sure to **Save changes**.

11. Immediately test to make sure everything is working. You can always switch back while troubleshooting! This is a good thing to do during a slow day/time.

SAML SSO, OpenID Connect, or Remote Auth

Follow these steps if your knowledge base is using SAML SSO, OpenID Connect, Remote authentication, or a combination:

1. Create a new reader group for people who log in via SSO.

2. Update SSO to automatically assign all readers to the new group.

   a. If you're using SAML SSO, you can do this as a custom map rule. To assign all readers to the same group, use the **Default** value matching type.

   b. If you're using OpenID Connect, add the same kind of custom rule in its **Map reader attributes** step. Refer to Configure OpenID Connect SSO for more information.

   c. If you're using remote authentication, the remote auth login script will need to be updated to automatically assign all readers to the group.

3. Confirm that all readers are now being given access to the new group.

4. Once all SSO readers are being assigned to the new group, you can start restricting categories (or articles) that should only be available to logged in readers.

   a. Readers won't notice anything since you're just updating permissions on the back-end and they'll continue to have access to the same content.

   

   Pro tip: Use your content organization
   It's easiest if you can organize your content by categories, as then you just need to update the top-level categories that need to be behind the login.

5. Make sure the theme has a login/logout button or link somewhere. Once you make it public, people who use SSO will need a way to log in again (it won't go there by default). The Log in link in your knowledge base header goes to the method you choose under **Send readers who aren't logged in to**. Each SSO method also has its own login link, shown next to it in the **Login methods** section.

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6. In **Security and access > Access & SSO**, if the **Images and files** section says **Only logged-in readers can open images and files.**, no images or files will load for public readers. If you plan to have any files displayed in your public content, select **Use public links...** and then **Convert to public links.** Refer to Requiring login to view files/images for more information.

7. If SAML or OpenID Connect shows **Required** in the **Login methods** section, select **Manage** next to it. In the **Turn on SAML** or **Turn on OpenID Connect** step, select **Available**, then select **Save changes.** Readers can still log in with it, but it no longer sends every reader who isn't logged in to your identity provider.



Look before you leap
If the **Make your knowledge base public?** modal opens, selecting **Make it public** makes your knowledge base public right away. Any content not restricted to your reader group will be publicly available!

8. In **Security and access > Access & SSO**, under **Who can read this knowledge base?**, select **Public** if it isn't already selected.



Look before you leap
Once you make this change and save, any content not restricted to your reader group will be publicly available!

9. In the **Login methods** section, update **Send readers who aren't logged in to:**
    a. If you're using SAML SSO, update it to **SAML login.**
    b. If you're using OpenID Connect, update it to **OpenID Connect login.**
    c. If you're using remote auth, update it to **Remote login URL.**
    d. If you're using more than one of these, you'll need to pick one as the default. The others still work through their own login links, which you can add to your login page or share with readers.

10. Be sure to **Save changes.** If the **Make your knowledge base public?** modal opens, select **Make it public.**

11. Immediately test to make sure everything is working. You can always switch back while troubleshooting! This is a good thing to do during a slow day/time.

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