



Custom author roles

Last Modified on 07/10/2024 1:08 pm EDT

If you need to lock down author permissions, you can create custom author roles to control what actions authors can perform in your knowledge base.

Authors with full account admin access can create custom roles.


To do so:

1. Select your **profile icon/name** in the upper right.
2. Select **Authors** from the dropdown to view the author details for your account.
3. Open the **Roles** tab.
4. Select the **+ Add Custom Role** button.

Authors

Teams

Roles



Create custom roles to give granular access to authors. Used to prevent unwanted access to features and functionality.

+ Add Custom Role

Name	Description	Actions
Editor	Standard role for authors. This role gets full access to all knowledge base content and settings.	<div>DEFAULT</div>
Writer	Standard role for authors. This role has full access to all knowledge base content but cannot update any settings.	<div>DEFAULT</div>

5. This will open an Author Role screen where you can define the custom role in more detail:

Author Role



Define a set of custom privileges to lock down what your authors have access to.

Role Name: 6

Description: 7

Article Permissions:

Allow authors assigned to this role to...

8

- ☐ Create any type of new article — this will override the create article permissions below
- ☐ Create articles from scratch
- ☐ Create articles from a template
- ☐ Create articles from any existing article
- ☐ Create articles that are content linked to an existing article
- ☐ Edit articles that are in draft mode
- ☐ Edit articles that are published
- ☐ Create new versions of articles
- ☐ Publish articles / versions that are in draft mode

6. First, assign a **Role Name**. This is the name as it will appear in the list of roles, and will display as an option when you are assigning an author to this knowledge base. It should be descriptive but not too long.
7. Next, add a **Description**. Though optional, this description can provide more detail about what the role's permissions do or don't include. You may also want to provide guidance around when to use this role.
8. Finally, select the **Permissions** you'd like the role to have using the checkboxes in each section. See [Available custom role permissions](#) for a more detailed breakdown of these options.
9. Once you've finished assigning the appropriate permissions, click the **Save Role** button at the bottom of the screen.

Once you create a custom role, you can then assign authors to the role to further control what actions they can perform in your knowledge base.

Use cases

As Linus grows his content creating empire, he might want to have some authors who can create and edit draft articles but can't publish or delete them. These authors would mark something as Ready to Publish but an Editor or Content Reviewer might review it before officially publishing it. Linus creates a custom "Content Contributor" role and assigns authors to it.