

# **Authors**

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Learn what author accounts are and how to administer them.

#### What is an author?

An author is someone who can log in to the back-end of your KnowledgeOwl account to create and edit content, customize settings, or view reporting. Authors are different from the people who can view your content, who we call readers.

All authors are assigned to specific knowledge bases with a particular role for that knowledge base. That role determines what actions the author can complete in that knowledge base. So an individual author account can have editor permissions on one knowledge base, writer permissions on another, and no access to a third knowledge base. You can create custom roles for your authors, too.

In addition to their knowledge base + role assignments, authors can have two additional administrative permissions:

- Full Account Admin: has the ability to edit other authors' accounts and other high-level administrative settings; can assign and remove authors from knowledge bases (including themselves). This shows the Authors, API, Readers, and Webhooks menu options within the profile icon/name menu in the upper right.
- Admin access to readers: with this access, authors see the Readers option when they open their profile icon/name menu in the upper right, can view all reader accounts across all your knowledge bases, and can create, delete, and edit existing readers. They will not see Authors, API, or Webhooks menu options.

### **Author permissions**

KnowledgeOwl has four levels of author permissions.

You can think of these permissions as answering several questions:

- Which knowledge bases do I have access to? (Knowledge Base Roles)
- What actions can I complete in those knowledge bases? (Knowledge Base Roles + Admin Rights)
- Which content can I complete those actions on? (Author Teams)
- Which content can I see in those knowledge bases? (Reader Groups)

#### 1. Admin Rights

There are three options for Admin Rights: Full Account Admin, Admin access to readers, and Admin ability to purge readers.

- a. Authors with Full Account Admin permissions can perform all actions in your account, including adding new authors; managing author permissions; creating and deleting API keys; updating account and billing information; creating and managing readers, groups, and reader settings; purging deleted readers; and cancelling your account.
- b. Authors can also be given Admin access to readers which allows them to create and manage reader, groups, and reader settings without the other Full Account Admin actions.
  - Those with this right can also be given the permission to Admin ability to purge readers. This lets
    you control whether you want to also give them the ability to permanently purge deleted
    readers.

#### 2. Knowledge Base Roles

Roles determine which actions an author can complete in the knowledge base. You specify what role an author has for each knowledge base in your account. KnowledgeOwl has two default roles, Editor and Writer, as well as the ability to create Custom Roles to further restrict what actions different authors are able to perform in your knowledge base. An author with no access will not see the knowledge base.

#### 3. Author Teams

You can control which content individual authors are able to edit using Author Teams. When you create an Author Team, you can restrict editing access for categories and articles to the team. Only authors who are part of the team will be able to edit restricted articles, or articles within a restricted category.

#### 4. Reader Groups

You can control what content individual authors can see using reader groups. By default, all authors have access to see all content. When you create a reader group, you can restrict categories and articles to that group. If you choose to restrict an author to a reader group, the author will only be able to see content that is not restricted or that is restricted to their reader group.



We only recommend assigning Reader Groups if you have a very specific reason to do so, since they will completely hide some content from authors and each time a new reader group is added, you must manually assign authors to the new group.

### Add an author

Authors who are full account admins can add new Authors.

When you add a new author, an invitation email will be sent with a temporary password. When the new author first logs in to KnowledgeOwl, they will be asked to update their password.

To add a new author:

1. Click on your profile icon/name in the upper right.

- 2. Select Authors from the dropdown to access the Authors area of your account.
- 3. Click the + Add Author button near the top.



If you don't see the + Add Author button, and instead you see an **Upgrade for More Author**Seats button, you do not have any available author seats. You can add them by clicking that upgrade button or going to your **profile icon/name > Account** to upgrade the number of authors in your trial or account.

- 4. Clicking the + Add Author button will open the Edit Author screen. You'll need to:
  - Add the author's account details
  - Add access to at least one knowledge base
  - o Optional: assign the author to one or more author teams
  - Optional, unusual: assign the author to one or more reader groups
- 5. Save your changes.

Let's walk through each section in more detail.

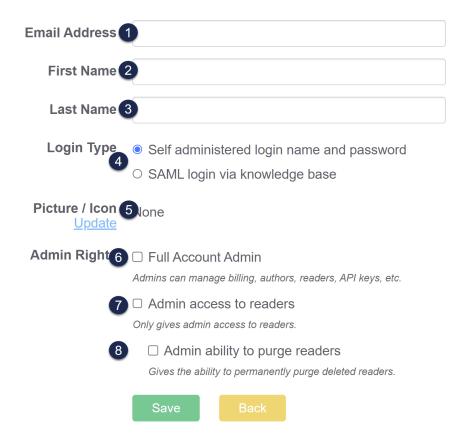
#### **Author account details**

The author account details (top section) establish the login details and admin privileges for this author.

#### Add Author



Basic author settings include email (what you use to log in), first/last name (how you appear as an author), pic access to knowledge bases and control their permissions below.



- 1. **Email Address** (required): This email address is where the author welcome email will be sent; it also acts as the author's username.
- 2. First Name (recommended, will display for author/log purposes)
- 3. Last Name (recommended, will display for author/log purposes)
- 4. Login Type (required, defaults to Self administered username and password) -- see Author login type for more information
- 5. Picture / Icon (optional)
- 6. Admin Rights Full Account Admin (optional) grants access to:
  - o profile icon/name > Account (Billing)
  - o profile icon/name > Authors (create, delete, edit authors)

- o profile icon/name > Readers (create, delete, edit readers; purge deleted readers)
- profile icon/name > API (API keys)
- profile icon/name > Webhooks
- 7. Admin Rights Admin access to readers (optional) grants access to only the Readers portion of the profile icon/name Admin menu.
- 8. Admin Rights Admin ability to purge deleted readers (optional): If Admin access to readers is checked, this option also grants the author the ability to purge deleted readers.

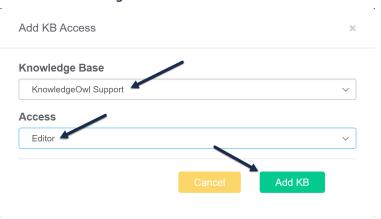
#### **Knowledge Base Access**

All authors are required to have access to at least one knowledge base.

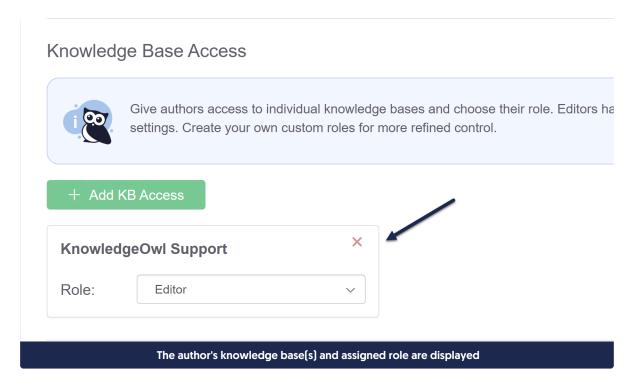
1. Click the + Add KB Access button.



- 2. Select the Knowledge Base you want this author to access from the dropdown.
- 3. Select the Access (role) you want this author to have for this knowledge base. Editor and Writer are built-in roles; additional roles listed here will depend on whether you've created Custom roles. See What is the difference between an editor and a writer? and the custom role permissions breakdown for these roles' permissions.
- 4. Click the Add KB button to save these assignments.



5. Once you click Add KB, you'll see the knowledge base and the role displayed:



- 6. Repeat this process for each knowledge base you'd like to grant this author access to.
- 7. Once you've completed this steps, you can Save the author. The last two sections are optional.

#### **Author Teams**

While roles decide which actions an author can complete, author teams decide which content an author can interact with. By default, no existing author teams will display here.

Once you've created author teams, a list of the teams will appear and you can check the boxes next to the appropriate teams here and save.

See What are author teams? and Create author teams for more information.

#### **Reader Groups**

By default, authors have access to all reader groups in your knowledge base, and can see content relating to all readers. If you'd like to limit this author to only see content restricted to particular reader groups, check the boxes next to the appropriate groups here and save.



If you want an author to have access to all content in the knowledge base, **DO NOT ADD** reader groups to their account.

# **Edit authors and permissions**

Authors with **Full Admin** permissions can manage all authors by going to their **profile icon/name** and selecting **Authors**.

The Authors page displays all authors and permissions along with the date of their last activity in app.knowledgeowl.com.

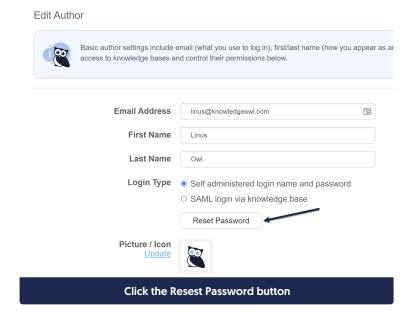
You can edit an individual author by clicking on their name and editing their author account details.

### Reset an author password

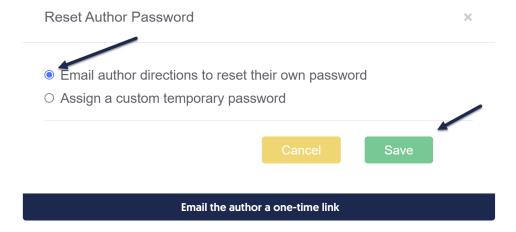
Authors can request a password reset email on the KnowledgeOwl login page. Authors can also change their own password by going to their profile icon/name and selecting Change Password.

Authors with Full Admin access can also reset passwords for other authors. To do so:

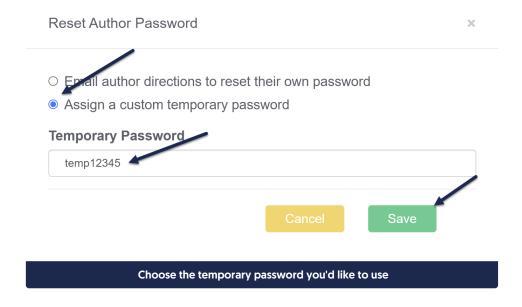
- 1. Click on your profile icon/name in the upper right.
- 2. Select Authors from the dropdown to access the Authors area of your account.
- 3. Click on the author whose password you'd like to reset.
- 4. Click the Reset Password button.



- 5. You'll have the option to email the author directions to reset their own password or assign a custom temporary password.
  - If you select the option to email directions to reset their own password, the author will receive an
    email with a one-time link that they can click to log in and reset their own password. This works well if
    you want the author to be automatically notified of the password reset. To send the directions and link,
    select this option and click the Save button.



To assign a custom temporary password, select that option and enter the password of your choice.
 Then click the Save button. This works well if you'd like to test the reset yourself to troubleshoot login issues, or if you want to notify the author of the temp password yourself directly.



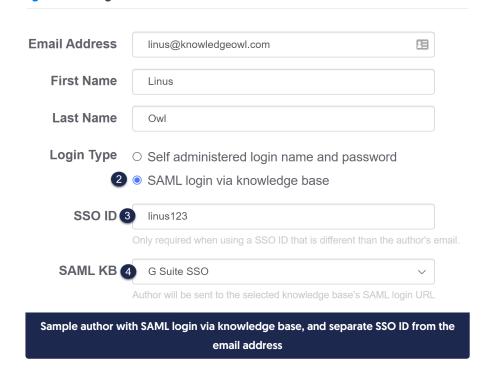
6. When the author logs in with the reset link or the temporary password, they will be asked to update their password.

# **Author login type**

By default, authors are created with self-administered usernames and passwords. This means that, even when you have SAML/SSO enabled for your knowledge base overall, KnowledgeOwl will store a password for each of your authors and allow them to log in using that username/password combination via https://app.knowledgeowl.com/login.

If you would like to prevent this alternate login and force your authors to authenticate using SAML/SSO, you can change the **Login Type** to "SAML login via knowledge base":

- 1. Open the author (or create a new author).
- In Login Type, select the option next to "SAML login via knowledge base".
- 3. **SSO ID** *(optional):* By default, the author's email address will be used as their SSO ID. If your SSO system uses an ID different ID for this author, add that ID here. Otherwise, leave it blank.
- 4. **SAML KB**: Select the knowledge base the author needs to log in through. You **must** have a knowledge base with a **SAML** integration configured for this to work.



- 5. As with other authors, set the Admin Rights, KB Access, Author Teams, and Reader Groups that are appropriate.
- 6. Save the author.

This setting basically says: "If the author tries to log in normally (using https://app.knowledgeowl.com/login), don't let them use their username/password and send them to the SAML login page for the KB I choose instead."

This setting does not need to be enabled for your authors to be able to log into the application via SAML.

When you set an author's login type to SAML login via knowledge base as you're creating their account, they will also receive a customized welcome email. Instead of the link to app.knowledgeowl.com/login, it will display the URL of your knowledge base's SAML login and steps on how to access the KnowledgeOwl app from there (the URL in Step 1 will change based on your settings):



Hi Sammy,

You are invited to join KnowledgeOwl!

To accept this invitation and log in to your account:

- 1. Go to https://myknowledgebase.knowledgeowl.com/help/saml-login
- 2. Follow the prompts to log in using Single Sign-On (SSO)
- 3. Click on Add Content or Edit in App at the bottom left of the screen to access the KnowledgeOwl app

Let us know if we can answer any questions or help in any way!

Your new friends at KnowledgeOwl



Note: if you set an author to SAML login via knowledge base and your SAML/SSO has an issue, your authors will be locked out of KnowledgeOwl. Most customers keep username and password self-administered so that their authors have an alternate way to log in in cases of issues with SAML/SSO. Generally only customers with very strict security requirements enable this option.

#### **Default author roles**

KnowledgeOwl comes with two default author roles:

- Editor: can perform all actions in a knowledge base, including customizing any setting
- Writer: can perform any action related to creating and editing content; does not have access to customize settings

Here's a full breakdown of each role's permissions:

Permission	Editor	Writer
Create any type of new article:	x	x
From scratch		
From a template		
From any existing article		
Content linked to an existing article		
Edit articles that are in draft mode	X	Х
Edit articles that are published	Х	Х
Create new versions of articles	Х	X

Permission	Editor	Writer
Edit versions of articles	X	Х
Delete versions of articles	X	Х
Activate versions of articles	Х	Χ
Publish articles that are in draft mode	Х	X
Move / re-order articles	Х	Χ
Archive articles	Х	Х
Delete articles	X	Χ
Edit articles in bulk	X	X
Create new categories	X	Χ
Edit categories	X	X
Move / re-order categories	X	Χ
Delete categories	X	Χ
Create new internal notes	X	X
Edit internal notes	X	X
Remove internal notes	X	X
Edit homepage content	X	X
Create new comments	X	X
Approve submitted comments	X	X
Delete submitted comments	X	X
Add glossary terms	X	X
Edit glossary terms	X	Х
Delete glossary terms	X	X
Add snippets	X	Χ
Edit snippets	X	X
Delete snippets	X	Х
Edit files	X	X
Delete files	X	Х
Create file labels	X	X
Edit file labels	X	Χ
Delete file labels	X	X
Add existing tags to articles	X	Х
Edit existing tags	X	X
Add new tags	X	X
Remove tags from articles	X	X
Delete tags	X	X
Create and manage exports - PDFs / HTML Zip	X	
Import content	X	
Update article ratings settings	X	
Update article favorites settings	X	
Update basic settings	X	
Update comment settings	X	
Update contact form settings	X	
Update PDF settings	X	

Permission	Editor	Writer
Update search settings, synonyms, and reindex search	Х	
Update security settings	X	
Update style / theming	X	
Update subscription settings	X	
Update required reading settings	X	X
Update widget settings	X	
View Reporting > Dashboard	X	X
View Reporting > Contact Form	X	X
View Reporting > Widget	X	X
View Reporting > Comments	X	X
Reset individual article ratings	X	
Reset all article ratings	X	
Reset individual article view counts	X	
Reset all article view counts	X	
View required reading reports	X	X
Run Broken Links Report	X	X
Run Advanced Search	X	X
Update Customize Text	X	X

To further restrict what actions an author can perform, create a custom role.

# **Export a list of authors**

If you have permissions to view **Authors** in your **profile icon/name** menu, you have permission to Export all authors to CSV by clicking the link near the top of the Authors page:

**Authors** 

Teams Roles



Currently using 5 out of 5 available authors.



Clicking this link will generate a CSV file that will display:

- Author ID: a random ID we assign to the author behind the scenes; you can ignore this.
- Last name
- First name
- Email
- Admin: Whether the author is designated as a full admin (Yes/No)
- Last Activity: the date/timestamp when they last did anything in KnowledgeOwl
- Last Login: the date-timestamp when they last logged in to KnowledgeOwl. Since our login page supports "Keep me logged in" options, sometimes this date is very different from date of Last Activity. If you're trying to see who's actively using KO, Last Activity is a better measure!
- Author Teams (if more than one, these will appear in a comma-separated list)
- Reader Groups (if more than one, these will appear in a comma-separated list)
- One column for each knowledge base in your account--if the author has access to the knowledge base, the role they have will display in the knowledge base's column

#### Here's a sample:



This export can make it easier to audit your authors' access and see when they've logged in/been active.

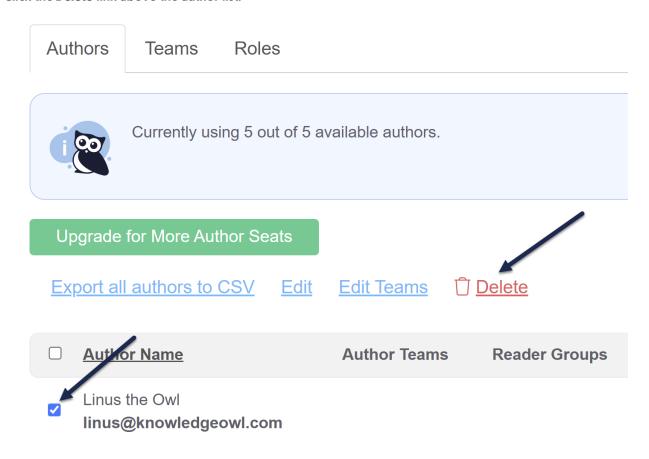
#### **Delete an author**



Only authors with Full Admin privileges can delete other authors. See What happens when I delete an author? for more info on what happens once you delete an author.

#### To delete an author:

- 1. Click on your profile icon/name in the upper right.
- 2. Select Authors from the dropdown to access the Authors area of your account.
- 3. Find or search for the author you'd like to delete.
- 4. Check the box to the left of their name.
- 5. Click the **Delete** link above the author list.



6. When the confirmation window appears, be sure that the author(s) listed there are the ones you intend to delete, and click **OK** to finish deleting them.



- 7. If this author was listed as the author for any articles, we recommend updating those articles to have a new author. The easiest way to do so is to:
  - Create a Manage Articles filter showing all articles with this author as the official author
  - Bulk editing them to have a new author

Once the author is no longer listed as an author for any articles, their name will disappear from the Author dropdown and filter fields. See What happens when I delete an author? for more information.

### What happens when I delete an author?

When you delete an author, they will no longer be able to log in to KnowledgeOwl.

#### Content

Deleting an author will **not** delete or lose any content that they edited. Articles and categories will continue to have the same content they had before the deletion.

#### **Revision history**

Deleting an author will **not** remove their name from the **revision** history for a given article. Their name will still be displayed in the revision list and when comparing revisions.

The Saved last date/timestamp and the revision history/count in the upper right of the article will stay the same.

However, if they were the last person to save an article, you will not see the "Saved by: [name]" between the Saved last date/timestamp and the revision history/count. That line will simply disappear. Once another author saves the article, it will reappear with the new author's name.

#### **Author dropdowns and filters**

If the author is not listed as the Author for any articles:

- Their name will disappear from the Author dropdown
- Their name will disappear from the Manage Articles Author filter.

If the author is listed as the Author for any articles:

- Their name will continue to appear in the Author field for those articles until you manually change the Author to a different author. (We recommend using a Manage Articles filter and Bulk Edit.)
- If you display author name in your articles, their name will continue to display until you change the Author.
- In the Article Editor, their name will continue to appear in the Author dropdown as long as they are listed as the Author for any articles.
- In Manage Articles, their name will continue to appear in the Author filter as long as they are listed as the Author for any articles.

#### **Broken Links Report**

Deleting an author will remove their name from the Author and Last Modified Author columns in the Broken Links Report.

### Can authors share logins?

Authors are allowed to share logins in KnowledgeOwl, meaning that two people can be logged in as the same author at the same time. For security and content auditing reasons, we advise against sharing logins. (But we understand that sometimes it's financially necessary!)

### Can multiple authors work on the same article?

If you have multiple people viewing or editing the same article at the same time in the app, the editor will warn you by adding an icon to the editor and adding a color outline around it. (If the author has added a photo or icon, you'll see that; otherwise you'll see a generic gray gravatar shape.)

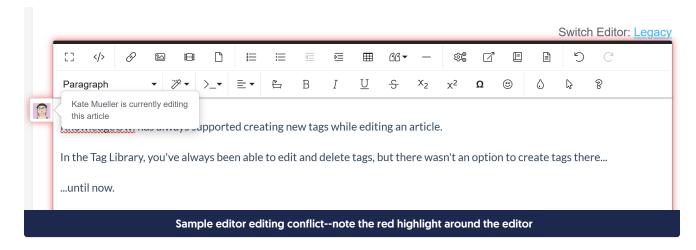
#### Viewing conflict

If someone else has the article open in the editor, but hasn't made any changes, you'll see the icon appear and a yellow outline will appear around the editor. You can hover your mouse over the icon to see the person who's accessing it:



#### **Editing conflict**

If someone else has the article open in the editor and has started making changes, you'll see the icon appear and a red outline will appear around the editor:



If one of you tries to save changes that would overwrite the changes the other one has made, you'll get a warning and can choose whether to keep your changes and overwrite the other person's, or to discard your changes and keep the other person's.

### **Author email delivery issues**

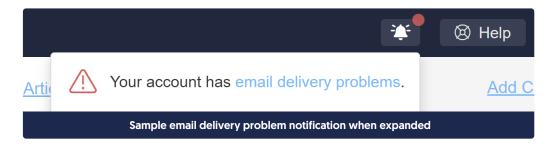
KnowledgeOwl generally sends three possible emails to authors:

- Welcome email: Sent when an author is given access to a new knowledge base
- Password reset email: Sent when an author requests a password reset or an admin initiates a password reset for the author
- Security token email: Only sent if we detect unusual behavior when an author attempts to log in and we initiate a security protocol

If we have trouble sending the welcome and password reset emails for any reason, a red notification dot appears over the notification bell in the site banner:



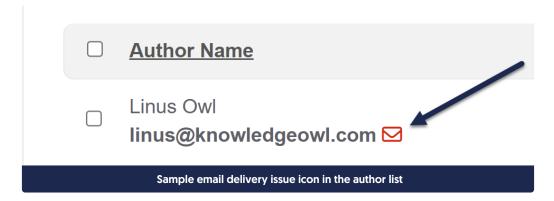
If you click on the notification bell icon, a message that your account has email delivery problems will appear:



Click the hyperlinked email delivery problems text to open a pop-up that tells you what delivery issues there are.

When author email addresses have issues, we'll provide a list of the author(s) impacted by the issues. Click the **Resolve** link next to each author's name to jump straight to their details to try to troubleshoot what's going on.

Any authors with email issues will also display a red envelope next to their name in the Authors page.



When you view the details for an author who has email delivery issues, a warning message displays above their email address. This message varies based on what's going on with the author. There are two basic scenarios you might see:

- 1. Email has issues but wasn't added to our suppression list: you'll see a green **Clear this Warning** button in the warning.
- 2. Email has issues and was added to our email suppression list: if this is the case, you'll see a green Remove button in the warning.

We'll walk through each scenario in more detail below:

# **Email has issues/not in suppression list**

Email issues can crop up for any number of reasons, like migrating an email server, a temporarily full mailbox, and more. Many of these issues won't result in an email being added to the email suppression list. Some of them may resolve on their own; others may need explicit troubleshooting to resolve.



Our delivery provider only captures these warnings at the time it tries to send an email, so it's possible that the issue we captured has already been resolved by the time you look at it. If the email isn't on the suppression list, you can just Clear the warning in these cases!

When the email hasn't been added to the email suppression list, the author's warning will look a bit like this:





This author's email address shows a delivery problem: Email rejected due to security policies - https://community.mimecast.com/docs/DOC-1369#554 [LZFn8gvYOd-uqg6LWv1VyA.uk88].

Clear this Warning

Learn more about author email delivery issues

Sample author warning without suppression list; details of the delivery problem will vary

The information provided here is intended to help you troubleshoot what's going on with the author's email address:

- 1. Our mail delivery provider captures the **error code or message** when email delivery fails. We'll display this back to you here. You can use this to help troubleshoot what's going on:
  - a. Verify that the author's email address is properly spelled. (You'd be amazed how often this is an issue for new author accounts!)
  - b. Try sending an email to that address and see if you get a bounce/undeliverable message.
    - If you don't get a bounce, the issue may have already resolved itself, and you can proceed with the next step.
    - If you do get a bounce, the issue still requires troubleshooting. We recommend reaching out to you or your author's email administrator with the delivery error message to expedite resolution.
- 2. Once it seems like the author's email can properly receive emails, click the Clear this Warning button to clear the warning and remove the banner from your site. The warning will reopen if we continue to experience any issues emailing this author.

# **Email has issues and is in the suppression list**

If an email address has had delivery problems and the address appears invalid, nonexistent, or misconfigured, it will also automatically be added to our mail provider's suppression list.

In these cases, even if the email address's underlying issue was resolved, KnowledgeOwl won't send any emails to the address until you remove it from the suppression list.



Our delivery provider only captures these warnings at the time it tries to send an email, so it's possible that the issue we captured has already been resolved by the time you look at it. If that's the case, you'll only need to **Remove** the email from our suppression list.

When the email has been added to the email suppression list, the author's warning will look a bit like this:



This author's email address shows a delivery problem: Not delivering to previously bounced address.

This email address has been placed on a delivery suppression list due to this issue.

Please remove it from the email suppression list so that they can receive emails from KnowledgeOwl.

Remove 2

Learn more about author email delivery issues.

#### Sample author warning message with suppression list Remove button

- 1. Our mail delivery provider captures the **error code or message** when email delivery fails. We'll display this back to you here. You can use this to help troubleshoot what's going on:
  - a. Verify that the author's email address is properly spelled. (You'd be amazed how often this is an issue for new author accounts!)
  - b. Try sending an email to that address and see if you get a bounce/undeliverable message.
    - If you don't get a bounce, the issue may have already resolved itself, and you can proceed with the next step.
    - If you do get a bounce, the issue still requires troubleshooting. We recommend reaching out to you or your author's email administrator with the delivery error message to expedite resolution.
- 2. Once it seems like the author's email can properly receive emails, click the Remove button. This will:
  - a. Remove the email address from our suppression list.
  - b. Clear the warning from the author's details.
  - c. Remove the warning banner from within KnowledgeOwl.

The warning will reopen if we continue to experience any issues emailing this author.

# Why is this email address saying it's on a suppression list?

KnowledgeOwl uses a mail delivery provider to send automatic emails like:

- Author welcome and password reset emails
- Reader welcome and password reset emails
- Contact form submissions

Our mail delivery provider keeps track of email bounces and errors.

If a bounce occurs because the intended recipient's email address is returned as **invalid**, **nonexistent**, or **temporarily misconfigured**, our mail provider adds that email address to a suppression list.

Suppression lists are tools mail delivery providers use to help protect your email reputation, by preventing you

from sending a bunch of emails that will bounce.

Once an email address has been added to this suppression list, no further emails will be sent to the email address unless you remove the email address from the suppression list.

For the email types listed above, KnowledgeOwl will throw a prominent warning when an email is having issues. When you view the details for that email address, we'll indicate if an address has been added to that automatic suppression list and give you the option to remove it from our suppression list so you can restart sending email to it.

For more details on working with each type of warning, see:

- Author email delivery issues
- Contact form submission email delivery issues
- Reader email delivery issues