



Author roles & custom roles

Last Modified on 07/10/2024 1:09 pm EDT

By default, KnowledgeOwl includes an Editor and Writer role, but you can create any number of custom roles to provide more nuanced permission control. Learn more about the default roles and creating custom roles here.

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: <ul style="list-style-type: none">• From scratch• From a template• From any existing article• Content linked to an existing article	X	X
Edit articles that are in draft mode	X	X
Edit articles that are published	X	X
Create new versions of articles	X	X
Edit versions of articles	X	X
Delete versions of articles	X	X
Activate versions of articles	X	X
Publish articles that are in draft mode	X	X
Move / re-order articles	X	X
Archive articles	X	X
Delete articles	X	X
Edit articles in bulk	X	X
Create new categories	X	X
Edit categories	X	X
Move / re-order categories	X	X
Delete categories	X	X
Create new internal notes	X	X
Edit internal notes	X	X
Remove internal notes	X	X

Permission	Editor	Writer
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	X
Delete glossary terms	X	X
Add snippets	X	X
Edit snippets	X	X
Delete snippets	X	X
Edit files	X	X
Delete files	X	X
Create file labels	X	X
Edit file labels	X	X
Delete file labels	X	X
Add existing tags to articles	X	X
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	
Update search settings, synonyms, and reindex search	X	
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	

Permission	Editor	Writer
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](#).

Custom author roles

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.	DEFAULT
Writer	Standard role for authors. This role has full access to all knowledge base content but cannot update any settings.	DEFAULT

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:

Description:

Article Permissions: Create any type of new article — this will override the create article permissions below

Allow authors assigned to this role to...

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.

Available custom role permissions

By default, a custom role has no permissions and you choose what each role should be able to do. Here are the categories of permissions available:

- **Article permissions**
 - Create any type of new article, or specify any of the four article types (create from scratch, copy existing article, create from template, or link/sync content to an existing article).
 - Edit draft articles
 - Edit published articles
 - Create new **versions** of articles
 - Edit versions of articles
 - Delete versions of articles
 - **Activate** versions of articles
 - Publish draft articles
 - Move or reorder articles
 - Archive articles
 - Delete articles
 - Edit articles in bulk (use the **Bulk Edit** link in **Manage**)
- **Category permissions**
 - Create new categories
 - Edit categories
 - Move or reorder categories
 - Delete categories
- **Internal note permissions**
 - Create new internal notes
 - Edit internal notes
 - Remove internal notes
- **Homepage permissions**
 - Edit homepage content
- **Comments permissions**
 - Create new comments
 - Approve submitted comments
 - Delete submitted comments
- **Glossary permissions**
 - Add glossary terms
 - Edit glossary terms
 - Delete glossary terms
- **Snippet permissions**
 - Add snippets
 - Edit snippets
 - Delete snippets
- **File library permissions**
 - Edit files
 - Delete files
 - Create file labels
 - Edit file labels
 - Delete file labels
- **Tag permissions**
 - Add existing tags to articles
 - Edit tags in the tag library

- Add new tags
- Remove tags from articles
- Delete tags from the tag library
- (Authors with the permission to edit tags and delete tags have the ability to merge tags)
- **Admin permissions**
 - Create and manage **PDF** and **HTML** exports
 - **Import** content
 - Update article **ratings** settings
 - Update article **favorites** settings
 - Update **basic** settings
 - Update **comment** settings
 - Update **contact form** settings
 - Update **PDF** settings
 - Update **search** settings, **synonyms**, and **reindex search**
 - Update security settings
 - Update **style / theming**
 - Update **subscription** settings
 - Update **required reading** settings
 - Update **widget** settings
- **Reporting permissions**
 - View **Dashboard**
 - View **Contact Form**
 - View **Widget**
 - View **Comments**
 - **Reset individual article ratings**
 - **Reset all article ratings**
 - **Reset individual article view counts**
 - **Reset all article view counts**
 - View **required reading reports**
- **Tools permissions**
 - Run **Broken Links Report**
 - Run **Advanced Search**
 - Update **Customize Text**

If you'd like to document/audit custom roles, you can use this Excel file: [KnowledgeOwl Author Roles - Excel format](#) 
