Author roles & custom roles

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Author roles set what an author can and can't do. Learn about the default author roles and how to create custom roles to get more nuanced permission control.

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: • From scratch • From a template • From any existing article • Content linked to an existing article • Create article content using AI (if AI feature is turned on)	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 / reorder articles	X	X
Archive articles	X	X
Delete articles	X	X
Generate article meta description from content using AI (if AI feature is turned on)	X	X
Check article content against the style guide using AI (if AI feature is turned on)	X	X
Edit articles in bulk	X	X
Create new categories	X	X

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Permission	Editor	Writer
Edit categories	X	X
Move / reorder categories	X	X
Delete categories	X	X
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	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 style guide settings	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

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Permission	Editor	Writer
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 find searches	X	X
Run replace jobs	X	X
Update Customize Text	X	X

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

Create a custom author role

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. This feature is available on select plans.

To do so:

1. Go to **Account > Authors**. The Authors page opens to the **Authors** tab.
2. Open the **Roles** tab.
3. Select **+ Add Custom Role** to begin creating your new role. The **Author role** page opens:



The top of the **Author role** page

4. In the first section, enter a **Name** for your role. 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. For example, we might create a "Reviewer" role.
5. Enter a **Description**. This description is displayed in the **Roles** tab only. Though the description is optional, we recommend you use this field to provide more detail about what the role's permissions do or don't include or guidance around when to use this role. For example, for our Reviewer role, we might say: "Can view and edit draft articles and versions and add and edit internal notes. Use for Subject Matter Experts (SMEs) who review for accuracy and clarity but shouldn't be authoring live content."
6. Use the checkboxes in the subsequent sections to grant this role permission to different objects and actions. Refer to

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7. If your organization is using Owl Intelligence, select the **Owl Intelligence permissions** authors with this role should have. Refer to Available custom role permissions for more information on each permission.

8. Once you've finished assigning the appropriate permissions, select **Save** in any section to save the role.

Once you create a custom role, assign authors to the role to apply those permissions to their account.

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

A custom role begins with no permissions, and you choose what each role should be able to do.

Here are the categories of permissions available:

Owl Intelligence

Use the permissions in this section to control which Owl Intelligence actions the role can perform. Options include:

- Create article content using AI
- Generate article meta description from content using AI
- Check article content against the style guide using AI

Articles

Use the permissions in this section to control how the role can work with articles, versions, Manage articles, categories, and internal notes. Options include:

Create new articles

Use the permissions in this subsection to control whether the role can create new articles or to restrict which types of new articles the role can create. Options include:

- **Create any type of new article**: Select this option if you'd like the role to be able to create all types of articles. You don't need to select any other checkboxes if you select this one.

To restrict the role so it can only create specific types of new articles, use the remaining options:

- 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

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Use the permissions in this subsection to control which articles the role can edit and whether it can bulk edit articles. Options include:

- Edit articles that are in draft mode
- Edit articles that are published
- Edit articles in bulk (use the Bulk Edit link in Manage)

Article versions

Use the permissions in this subsection to control how the role can work with versions. Options include:

- Create new versions of articles
- Edit versions of articles
- Delete versions of articles
- Activate versions of articles

Manage articles

Use the permissions in this subsection to control which actions the role can complete in Manage. Options include:

- Publish articles that are in draft mode
- Move / reorder articles
- Archive articles
- Delete articles

Categories

Use the permissions in this subsection to control how the role can work with categories. Options include:

- Create new categories
- Edit categories
- Move / reorder categories
- Delete categories

Internal notes

Use the permissions in this subsection to control how the role can work with internal notes in both articles and categories. Options include:

- Create new internal notes
- Edit internal notes
- Remove internal notes

Glossary

Use the permissions in this section to control how the role can work with Glossary terms. Options include:

- Add glossary terms
- Edit glossary terms
- Delete glossary terms

Snippets

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Use the permissions in this section to control how the role can work with snippets. Options include:

- Add snippets
- Edit snippets
- Delete snippets

Tags

Use the permissions in this section to control how the role can work with tags. Options include:

- Add new tags
- Edit existing tags *
- Delete tags *
- Add existing tags to articles
- Remove tags from articles
- Delete tags from the Tags page



*** Merging tags**
Authors with the permissions to **edit existing tags** and **delete tags** can merge tags.

Files

Use the permissions in this section to control how the role can work with files and file labels. Options include:

- Edit files
- Delete files
- Create file labels
- Edit file labels
- Delete file labels

Tools

Use the permissions in this section to control which **Tools** the role can use. Options include:

- **Find and replace**
  - Run find searches
  - Run replace jobs
- **URL checker**
  - Run URL checker to generate links reports
- **Imports**
  - Import content
- **Exports**
  - Create and manage exports - PDF / HTML Zip

Reporting

Use the permissions in this section to control which Reporting the role can view and use. Options include:

- **Dashboard**
  - View the dashboard

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    - Reset individual article ratings
    - Reset all article ratings
    - Reset individual article view counts
    - Reset all article view counts
- **Contact form**
    - View the contact form reports
- **Widget**
    - View widget reports
- **Comments**
    - View all comments
    - Create new comments
    - Approve submitted comments
    - Delete submitted comments
- **Required reading**
    - View required reading reports
- **Analytics**
    - View analytics reports
- **AI chatbot**
    - View AI chatbot reports

Security and access

Use the permission in this section to control whether a role can open and update **Security and access > Access & SSO** and update **Security and access > Security headers**:

- **Update security settings**: Lets the role choose who can read the knowledge base, change images and files security, login settings, and login methods (direct login, SAML, OpenID Connect, remote authentication, and Salesforce SSO), and edit the HTTP response headers on the **Security headers** page.



No read-only access to Access & SSO
Authors without this permission (and without the Editor role for the knowledge base) can't open the **Access & SSO** page at all. They can still view the **Security headers** page, but can't change it.

Customize

Use the permissions in this section to control which **Customize** options the role can change. Options include:

- **Homepage**
    - Edit homepage content
- **Style (HTML & CSS)**
    - Update style / theming
- **Default text**
    - Customize the default text
- **Contact form**
    - Update contact form settings
- **PDF**
    - Update PDF settings

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KB settings

Use the permissions in this section to control which **KB settings** the role can change. Options include:

- **Basic**
  - Update basic settings
- **AI chatbot**
  - Update AI chatbot settings
- **Search and synonyms**
  - Update search settings, synonyms, and reindex content for search
- **Style guide**
  - Update style guide settings
- **Ratings**
  - Update article ratings settings
- **Favorites**
  - Update article favorites settings
- **Comments**
  - Update comments settings
- **Subscriptions**
  - Update subscription settings
- **Required reading**
  - Update required reading settings
- **Widget**
  - Update widget settings
- **Analytics**
  - Update analytics settings

If you'd like to document/audit custom roles, download this Excel file: KnowledgeOwl Author Roles - Excel format

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