Author roles & custom roles

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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: - 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 / reorder 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 / reorder 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	
View required reading reports	X	X

Permission	Editor	Writer
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.

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

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 <u>all</u> 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

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

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:
- **Advanced search**
  - Run **advanced searches**
- **Broken link checker**
  - Run **broken link 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**
  - **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

Security and access

Use the permissions in this section to control whether a role can access and update **Security and access > Security settings** and **Single sign-on**:

- **Update security settings**

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

KB settings

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

- **Basic**
  - Update basic 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** 📎