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User roles

Roles allow you to set up a hierarchy of users and to control which articles users can see.

Roles are set up as tree structures, and when you mark an entry as private to a specific role then users with this role and with parent roles have access to the article. Any role below it in the tree, and roles that do not belong to 'current tree', will not be able to access the article.

For example, suppose you have the following roles:

Title
Employees
Customers
Contractors
..... Manager
..... Beta Tester
..... Tech Writer
..... Programmer
Partners

In the above tree the Contractors role has a sub-role of Manager, and below that sub-sub-roles of Beta Tester, Tech Writer and Programmer.

Users can be assigned to multiple roles. Thus your programmer could also be an employee.

If you mark an article [private read](#) and assign to it a role of 'Programmer', then contractor managers and programmers will be able to access the entry. No one else will have access to this article.

Note:

- Users with administrator privilege have access to any article in any category.

Create new user role

Roles control access to knowledgebase articles and files.
Some default roles have been created, but you can also create your own.

You must have administrator access to create new roles.

To create a new role:

- Click on **Users**
- Choose the **Roles** tab
- Click **Add New**

The following are compulsory:

- You must include the role name in the **Title**
- The **Parent role** denotes where in the list of roles this role is placed. If you choose 'Top Level' your new role becomes a top level role. Otherwise, choose the parent role for your new role.

You may also wish to:

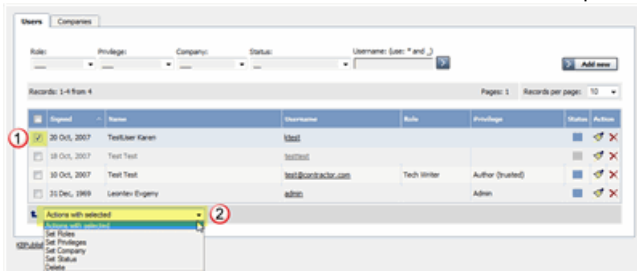
- Add a **description** to explain why this role has been set up and how it should be used

Change user role

There are two ways to change the role of a user.

The quickest way allows you to update the role of more than one user at the same time.

- Click on the **Users** menu
- Check the box to the left of the user or users you wish to change
- Choose **Set Role** from the **Actions with selected** drop down box



- This brings up another drop down box with a list of roles to choose from. One of these options is to 'remove all roles'.
- Select the role you wish to change to
- Click **OK**
- You will be asked if you really want to change the role. Click **OK** to confirm.

The other way to change the role of the user is to:

- Click on the **Users** menu
- Click on the paintbrush under **Actions** to **edit** the user
- Change the **Role**
- Click **OK**.

This second method only allows you to change the role of one user at a time.

Set Default User Roles

New users can be created two ways. They can be [set up by the knowledgebase administrator](#), or users can [register](#) themselves.

By default, KBPublisher creates registered users with no designated role. You can change this so that new users are created with a specific role by:

- First, ensure that the role exists. If it doesn't, [create it](#) first
- From the **Settings** menu choose the **Public Area -> Common** tab
- Go to the **Security / Privacy / Registering** section
- Select the appropriate **Role for new registered users** from the drop-down list of roles
- Click **Save**.

All users who register after this are created with the new default role.

You must have administrator access to change the settings.

