

How can I restrict article creation to specific users?

QUESTION

Our knowledgebase has three different groups of writers:

- The subject matter experts (SMEs) who write the policies and processes for front-of-house
- The IT team, who write support documents for IT issues
- The sales team, who list prices and features of our various products

How do I set up my knowledgebase so that the three groups can only write articles specific to their area of expertise?

ANSWER

You do this using roles and categories, and set your categories to private write.

Set up roles and categories

First, create roles for the each type of user:

- [Create a role](#) called **SME** and assign all your subject matter expert writers to this role
- [Create a second role](#) called **IT** and assign all your IT writers to this role
- [Create a third role](#) called **Sales** and assign all your sales writers to this role

Users

Users Companies **Roles** Privileges

Roles:

All roles +

ID	Title	Description	Users
24	Author groups		
27	IT	IT team	1
28	Sales	Sales team	
26	SME	Subject matter experts	

Note that you don't have to restrict these roles just to writers, it can include all your sales team, IT group and subject matter experts. The user's privilege still controls whether they can write articles or not.

Next, create private categories:

- [Create a category](#) for policies and processes
- For the **Private** field, check **Write** (Write restricts write access to the category but allows everyone to read it)
- This brings up a new option, **Access for assigned roles only**. Select **SMEs**

Articles

Articles Drafts Featured Comments Feedbacks Glossary **Categories** Template

Add new

*Title:	<input type="text" value="Policies and processes"/>
Description:	<input type="text"/>
*Parent category:	<input type="text" value="TOP LEVEL"/> +
Category type:	<input type="text" value="Standard"/> ?
Sort entries by:	<input type="text" value="Default (Use rule defined in Settings)"/> ?
Order:	<input type="text" value="AT THE END"/>
Private:	<input checked="" type="checkbox"/> ?
	<input type="checkbox"/> Read <input checked="" type="checkbox"/> Write
	Access for assigned roles only:
	<input type="text" value="Author groups :: SME"/> + - ↑
Allow comments:	<input checked="" type="checkbox"/> Yes ?
Allow rate:	<input checked="" type="checkbox"/> Yes ?
Published:	<input checked="" type="checkbox"/> Yes

Supervisor

+ - ?

Save

Cancel

- Select other options required for this category and then **OK** to complete
- Do the same for IT and Sales

Create your articles

Everything is now set up.

- Only subject matter experts can [create or update articles](#) in the SME category
- Only IT people can create articles in the IT category
- Only Sales people can create articles in the Sales category

All users can read all articles, however.

This functionality works in version 3.5 and above

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