2 docs

Managing Users

Different people on your team build and market different parts of your product so it makes sense to collaborate on your docs and let experts write everything they know about each feature.

Understanding Roles

You can assign roles to team members you invite to HelpDocs depending on the actions they'll take inside the product. Here's a breakdown:

Role	Permissions
Owner	The **Owner** role is automatically assigned to the creator of the account. This role can do everything, including manage billing. Owners can't be deleted, but they can transfer ownership.
Administrator	Users with an **Administrator** role can do everything too. They can manage HelpDocs settings, billing, branding, and add/remove users and API keys. They can also edit all articles and content.
Editor	An **Editor** can see stats and manage content, but can't edit any settings or branding.
Read Only	Users with this role can only view content. This is usually paired with the Restrict to Logged In Users (https://support.helpdocs.io/article/YClKB8p02e-restricting-your-docs-to-logged-in-users) auth option.

Inviting a User

You can quickly invite users to your account. While you're waiting for them to accept the invitation they'll show up in the **Invitations** tab.

> Pending invitations take up slots on your account
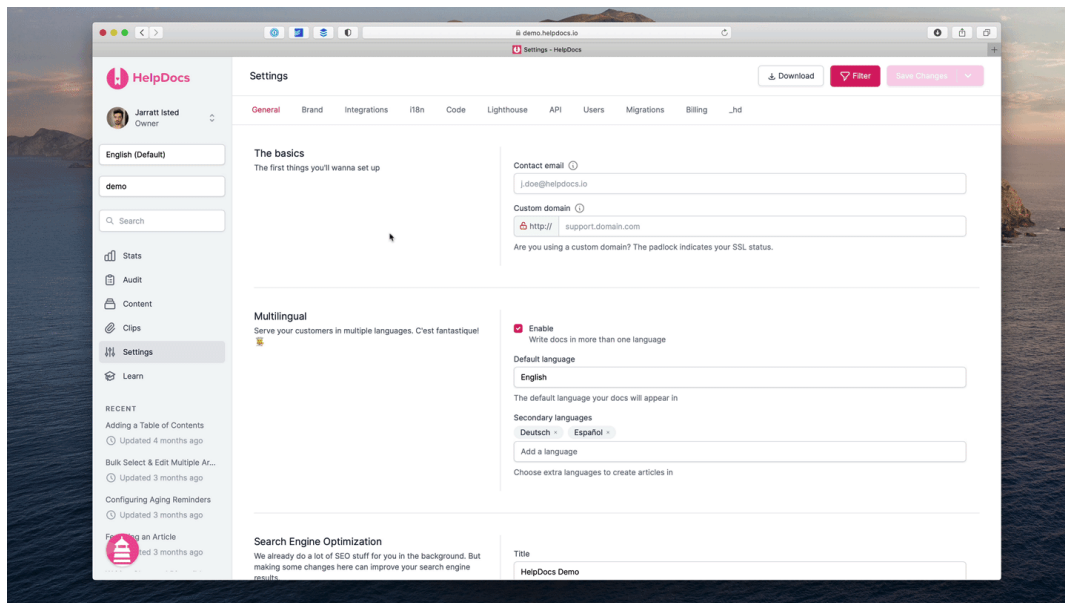
1. Head to **Settings** > **Users**

2. Switch to the **Invitations** tab

3. Click **Invite New Users** at the top right

4. Fill out their email address, their role, and whether to send them an email invite or not

> If you don't send over an email invite they'll need to head to `yourdomain.helpdocs.io/signup` and enter their email address there
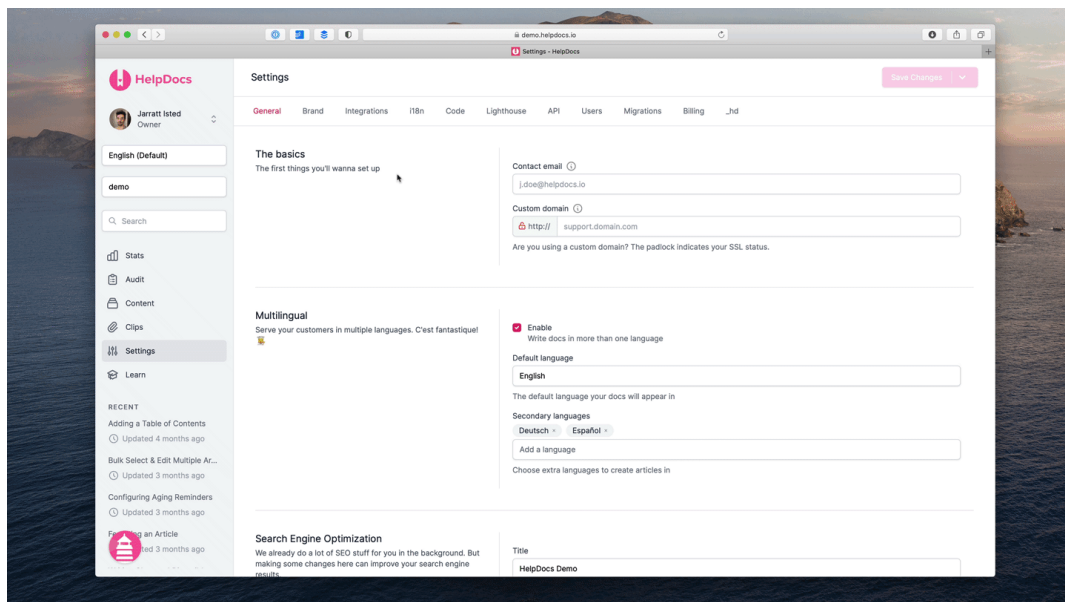
5. Click **Send Invite**

> **Invite multiple users by separating email addresses with a comma, like so**:
>
> chromegoose@helpdocs.io,lindatherabbit@helpdocs.io,liveythepelican@helpdocs.io

Changing the Default User Role

When you invite a new team member in **Settings** > **Users** they'll automatically be assigned a specific user role. You can change the role they'll be assigned.

1. Head to **Settings** > **Users** > **Access** and head to the **Defaults** section
2. From the **Default User Role** dropdown menu select the role you'd like to be assigned
3. Click **Save Changes**

Changing Roles
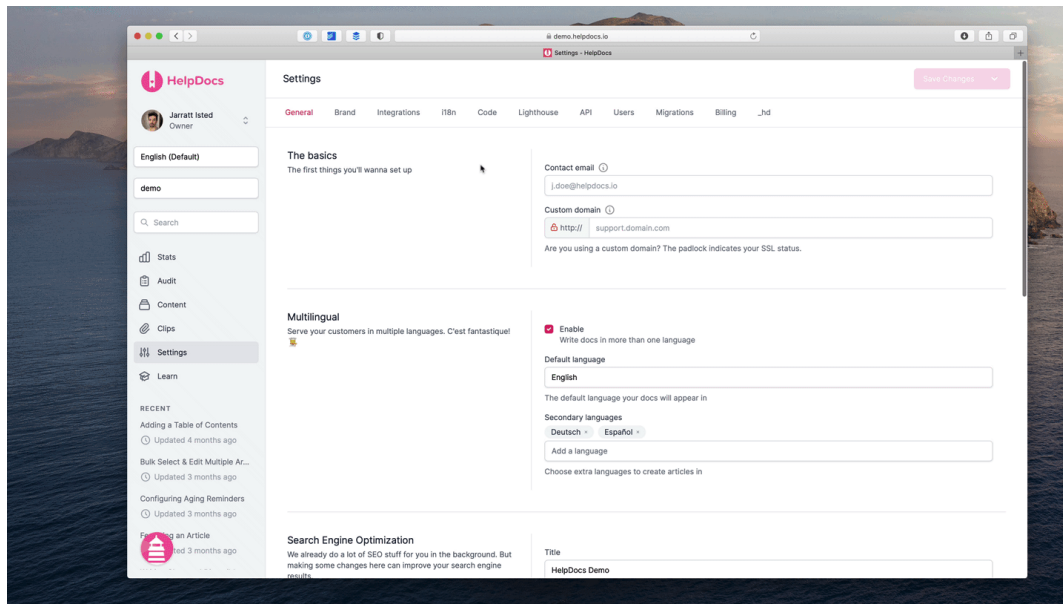
1 In your HelpDocs dashboard, head to **Settings** > **Users**

2 Click the checkbox next to the team members you'd like to edit and click **Edit User**

3 Choose a new role from the **Role** dropdown

4 Click **Save Changes**

Transferring Ownership

If you're the owner of your account you can *transfer ownership* to any other user.

1 Head over to **Settings** > **Users**

2 Select the user you wish to transfer ownership to

3 Click **Edit User**

4 In the **Role** dropdown select **Owner**

5 Hit **Save Changes**

Once you transfer your account to a new owner you'll become an **Administrator** instead. There's no way to reassign ownership to yourself later on. If you transfer ownership by mistake, contact support in-app as soon as possible.

Viewing Last Active Time

In the corner of each user's profile image in the users table you'll see a little dot indicating their status. If the user is currently online that dot will be green. If they're offline the dot will be grey.

You can hover over the status dot to find out when they were last active.

Filtering Users

Looking for a certain someone? You can filter by users' activity, role, and user groups to find the subset of users you're interested in.
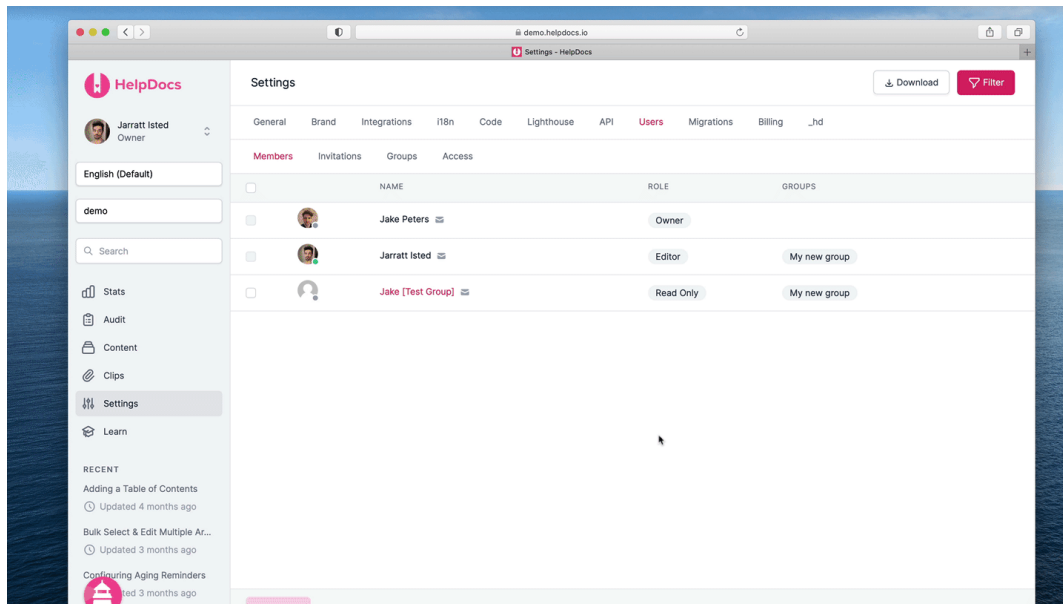
1 Head to **Settings** > **Users**

2 On the User tab click **Filter** in the top right to expand the filtering options

3 Add your filters. You can filter by:

- Name
- Email
- Inactive for x amount of time
- Active in the last x amount of time
- User group
- Role

4 Click **Apply**

Deleting Users

If you're an **Administrator** or **Owner** you can delete users from your account.
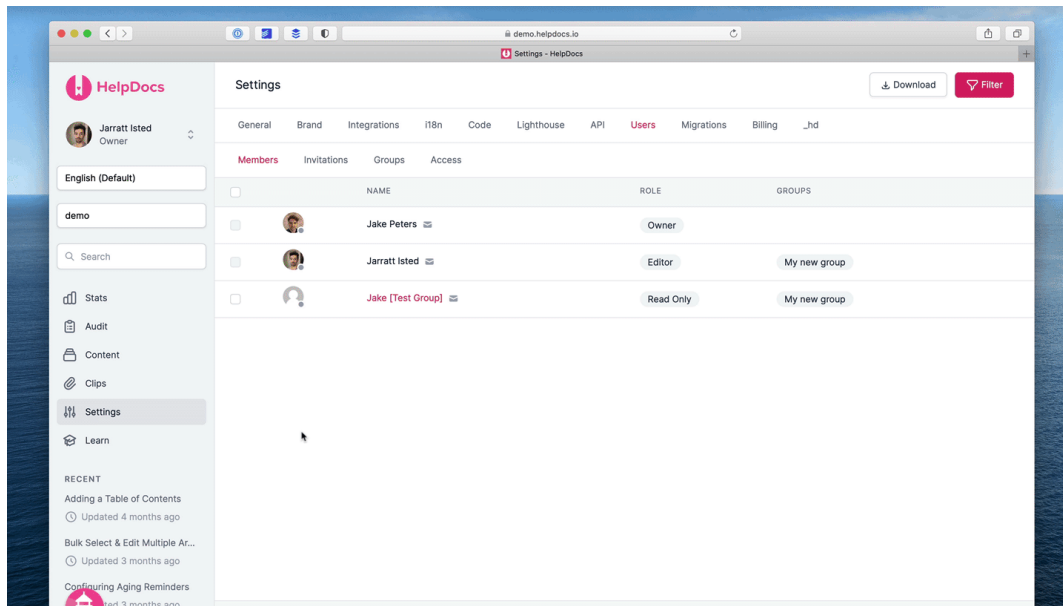
1 Head to **Settings** > **Users**

2 Select which users you'd like to delete using the checkboxes

3 Click **Edit x Users**

4 Click **Delete users**

If you delete a user all their articles remain exactly as they are now. The articles they have written are preserved ✨

The HelpDocs Trial

As a new HelpDocs user you'll get a **14 day free trial** with *most* of our features unlocked to see if it's the right platform. The only things you won't get access to are [Permissioning (https://support.helpdocs.io/article/9qsypn7zsx-understanding-permissioning)](https://support.helpdocs.io/article/9qsypn7zsx-understanding-permissioning) and [Machine Translations (https://support.helpdocs.io/article/o9eyh1ex6x-automatically-translate-articles-with-machine-translations)](https://support.helpdocs.io/article/o9eyh1ex6x-automatically-translate-articles-with-machine-translations). If you wanna try these out too let us know! ✨

First head to [our signup page (https://www.helpdocs.io/signup)](https://www.helpdocs.io/signup). To get going you'll need to enter some details:

- Your full name

- We'll use this to show your users who wrote each article

- Your email address

- Must be a valid address we can reach you at to confirm your account

- A password for your account

- 8+ characters
- At least one number

- Your desired company [slug (https://support.helpdocs.io/article/1vUqYdcYHV-what-is-an-account-slug)](https://support.helpdocs.io/article/1vUqYdcYHV-what-is-an-account-slug)

- HelpDocs accounts all come with a subdomain, e.g. **your-app.helpdocs.io**
- The **slug** is the part before the **.helpdocs.io**
- This must be unique, and can only contain lowercase letters, hyphens, and numbers (i.e. **kebab case**)

> We want to make sure you have the best experience on your trial. If you have any trouble signing up or need longer to evaluate HelpDocs, get in touch! We'd love to help out.