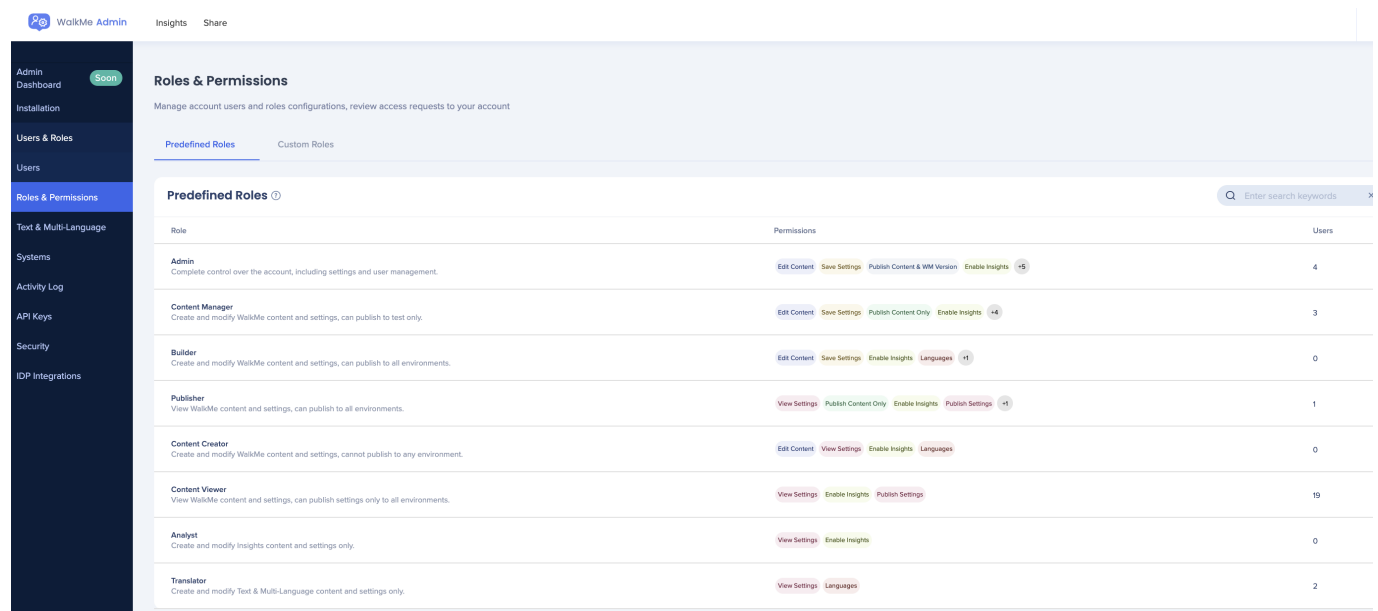


Roles and Permissions

Brief Overview

The Roles and Permissions page in the Admin Center presents clear and intuitive user management architecture including a new roles hierarchy that shows detailed role permissions and eliminates the need for custom roles

Access it from admin.walkme.com.



The screenshot shows the 'Roles & Permissions' page in the WalkMe Admin interface. The left sidebar contains navigation links: Admin Dashboard, Installation, Users & Roles, Users, Roles & Permissions (highlighted), Text & Multi-Language, Systems, Activity Log, API Keys, Security, and IDP Integrations. The main content area is titled 'Roles & Permissions' and includes a sub-header 'Manage account users and roles configurations, review access requests to your account'. Below this, there are tabs for 'Predefined Roles' and 'Custom Roles'. The 'Predefined Roles' tab is active, showing a table of predefined roles with their descriptions, permissions, and user counts.

Role	Permissions	Users
Admin Complete control over the account, including settings and user management.	Edit Content, Save Settings, Publish Content & WM Version, Enable Insights	4
Content Manager Create and modify WalkMe content and settings, can publish to test only.	Edit Content, Save Settings, Publish Content Only, Enable Insights	3
Builder Create and modify WalkMe content and settings, can publish to all environments.	Edit Content, Save Settings, Enable Insights, Languages	0
Publisher View WalkMe content and settings, can publish to all environments.	View Settings, Publish Content Only, Enable Insights, Publish Settings	1
Content Creator Create and modify WalkMe content and settings, cannot publish to any environment.	Edit Content, View Settings, Enable Insights, Languages	0
Content Viewer View WalkMe content and settings, can publish settings only to all environments.	View Settings, Enable Insights, Publish Settings	19
Analyst Create and modify Insights content and settings only.	View Settings, Enable Insights	0
Translator Create and modify Text & Multi-Language content and settings only.	View Settings, Languages	2

Use Cases

- Improve user management consistency across accounts
- Help WalkMe admins manage team permissions by standardizing role distribution and hierarchy in each account
- Add a new permission type to support basic use cases (separate publish to production and test environments)
- Increase account security by reducing the number of “Admin” users per account

Predefined Roles

WalkMe Admin Insights Share

Admin Dashboard Soon

Installation

Users & Roles

Users

Roles & Permissions

Text & Multi-Language

Systems

Activity Log

API Keys

Security

IDP Integrations

Roles & Permissions

Manage account users and roles configurations, review access requests to your account

Predefined Roles Custom Roles

Predefined Roles

Q Enter search keywords X

Role	Permissions	Users
Admin Complete control over the account, including settings and user management.	Edit Content Save Settings Publish Content & WM Version Enable Insights +15	4
Content Manager Create and modify WalkMe content and settings, can publish to test only.	Edit Content Save Settings Publish Content Only Enable Insights +4	3
Builder Create and modify WalkMe content and settings, can publish to all environments.	Edit Content Save Settings Enable Insights Languages +1	0
Publisher View WalkMe content and settings, can publish to all environments.	View Settings Publish Content Only Enable Insights Publish Settings +1	1
Content Creator Create and modify WalkMe content and settings, cannot publish to any environment.	Edit Content View Settings Enable Insights Languages	0
Content Viewer View WalkMe content and settings, can publish settings only to all environments.	View Settings Enable Insights Publish Settings	19
Analyst Create and modify Insights content and settings only.	View Settings Enable Insights	0
Translator Create and modify Text & Multi-Language content and settings only.	View Settings Languages	2

A user's role defines their permissions and limitations. In the Roles tab you will see all of the Roles listed with the corresponding number of assigned users.

These are the predefined roles WalkMe supports:

- **Admin:** Have complete control over the account, including settings and user management
- **Content Manager:** Create and modify WalkMe content and settings, publish to all environments
- **Builder:** Have full access, except for publishing and User Management
- **Publisher:** View WalkMe content and settings, publish to all environments
- **Content Creator:** Edit WalkMe content and view settings – No access to publishing (use case: technical writer)
- **Content Viewer:** View WalkMe content and settings – Includes access to Insights. (use case: reviewer)
- **Analyst:** View WalkMe content and settings, have complete access to Insights (use case:

Insights reviewer)

- **Translator:** Create and modify Text & Multi-Language content – No access to the Editor
- **New! System Manager:** Manage systems assigned to you and associated users – No access to security and API keys

Note

Products and capabilities that are not related to a specific role type won't display in the set of permissions.

Each role specifies the user's access to the following features:

- **WorkSpace:** Permissions to perform actions on specific the apps in the Editor
- **Settings:** Permission to save settings in the Editor
- **Insights:** Permissions to perform changes in Insights
 - **Note:** It is possible to restrict access to Insights by setting the Insights role permission to "None"
 - **Limitation:** Insights doesn't support the "Read" permission
- **User Management:** Admin permissions to see and manage content in the Admin Center
- **Edit Languages:** Permission for Text & Multi-Language
- **Customize:** Permission to perform actions in the Customize tab in the Editor
- **Publish:** Permission to publish Editor content or settings

Custom Roles

You can create a custom role when you want to have very specific permissions for the role that are not included in one of the pre-defined roles.

The following role permissions are supported:

- Administrative
- Content
- Data
- Publish

Create Custom Role

X

Role Name

IT Specialist

Role Permissions

Select the levels of access the user will have

Expand All

> Administrative



> Content

> Data

> Publish

Permissions	Category	Values	Notes
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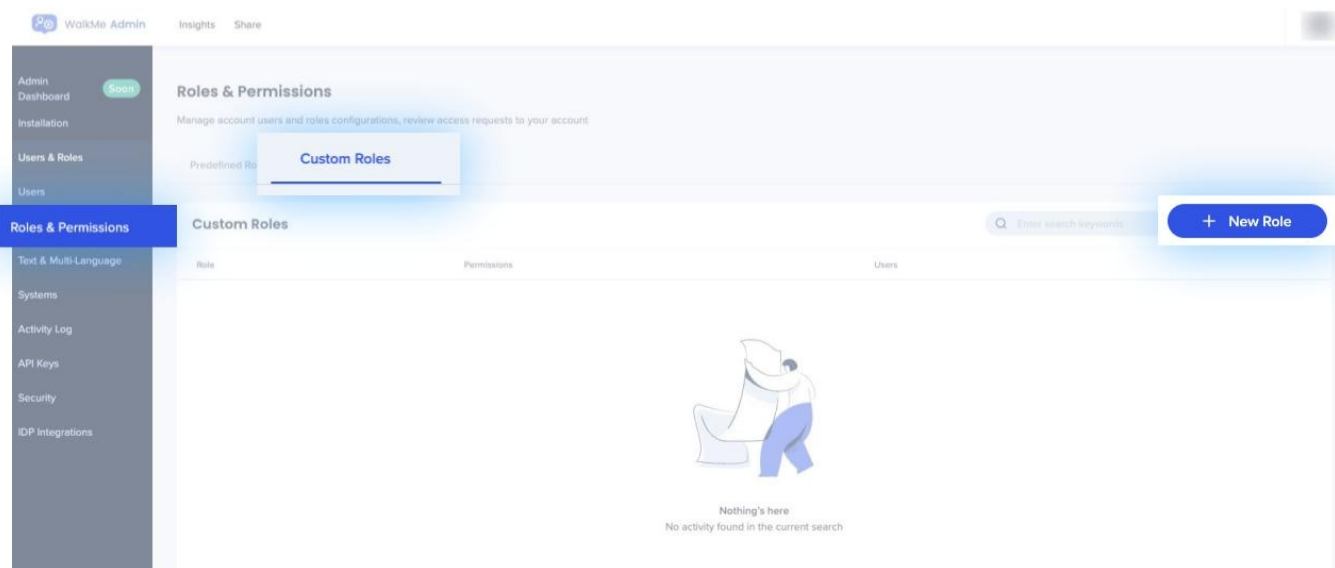
 Administrative	Manage Users	<ul style="list-style-type: none"> • None • View Only • Limited Access • Edit 	<ul style="list-style-type: none"> • If "None" permission is set for "Manage Users", there will be no option to select a value for "Manage Systems" permissions, which is required to access the Admin Center New! Limited Access: <ul style="list-style-type: none"> • Can assign users only to systems they are assigned to • Can remove users only from the systems they are assigned to • Can't delete users from systems they are not assigned to OR from the entire account • Can't upgrade themselves to "Admin" role • Can't upgrade new or existing users to "Admin" role • Can't edit user last/first name • Can't edit login method • Can't force reset password • Can't create custom roles • Can't assign users to roles
	Manage Systems	<ul style="list-style-type: none"> • None • Limited Access • Edit 	<ul style="list-style-type: none"> • "Manage Users" permissions are required to access the Admin Center New! Limited Access: <ul style="list-style-type: none"> • Can view only systems they are assigned to • Can modify only the systems they are assigned to • Can access the activity log, only to the systems they are assigned to • Can't create new systems • Can delete and restore only assigned systems

 Content	Manage Content	<ul style="list-style-type: none"> • None • View • Edit 	<ul style="list-style-type: none"> • Users must have a minimum of "View" permissions to access the editor
	Customize Templates & CSS	<ul style="list-style-type: none"> • None • Edit 	
	Manage Settings	<ul style="list-style-type: none"> • None • View • Edit 	<ul style="list-style-type: none"> • "Edit" permissions will allow a user to access and edit the Environment and System settings in Insights <ul style="list-style-type: none"> ◦ Insights Settings • Users must have a minimum of "View" permissions to access the editor
 Data	Insights Access	<ul style="list-style-type: none"> • None • Allowed 	

Publish	Publish Content	<ul style="list-style-type: none"> • None • Non-production only • All Environments 	<ul style="list-style-type: none"> • "Publish Content" permissions are required to perform a publish • If "None" permission is set for "Publish Content", there will be no option to select a value for "Publish Settings" or "Publish WalkMe Version" permissions
	Publish Settings	<ul style="list-style-type: none"> • None • Non-production only • All Environments 	
	Publish WalkMe Version	<ul style="list-style-type: none"> • None • Non-production only • All Environments 	

Create a custom role

1. In the left menu, click **Roles & Permissions**
2. Click **Custom Roles**
3. Click the **+** icon
 - A side panel will open up
4. Name your custom role
5. Click **Save**
6. The new custom role will appear under the **Custom roles** tab



Each permission for each app has its own set of abilities under each category

Note

Only users with the following permissions can have access to the Editor:

1. The custom role must be assigned either “Manage Content: View” or “Manage Content: Edit”
2. The custom role must be assigned either “Manage Settings: View” or “Manage Settings: Edit”

Delete a custom role

Roles & Permissions

Manage account users and roles configurations, review access requests to your account

Predefined Roles

Custom Roles

Custom Roles

Q Enter search keywords x

+ New Role

Role	Permissions	Users	
Quality Assurance	View Settings Enable Insights 	1	 Delete Role
Contributor	Edit Content	0	

 Failed to delete role cannot remove this role because users assigned to it 

1. Hover over relevant custom role you want to delete
2. Click the trash bin icon

Tip Tuesday Videos

Roles and Permissions





To see more Tip Tuesday videos on WalkMe World [click here](#).