

Permissions & restrictions in FOLIO

Single tenant with multiple libraries


This space is to define needed requirements from a functional point of view and to share information about the actual process of permitting and denying. It is of additional interest to document the process of shared features, like notes, tags or custom fields.

Links

JIRA

[UXPROD-1994](#): ERM | Single Tenant w/ Multiple Libraries Support

[UXPROD-979](#): Ability to create Teams (acquisitions units) and assign users, orders, organizations, invoices and funds to them.

 [UXPROD-592](#) - Multiple Language and Localization settings per institution (was Multiple timezones per institution) [OPEN](#)

: Multiple Language and Localization settings per institution (was Multiple timezones per institution)

Meeting minutes

[Consortia SIG meeting Aug 7th 2019](#)

[App Interaction meeting Aug 23rd 2019](#)

[App Interaction meeting Nov 20th 2019](#)

[App interaction meeting Dec 13th 2019](#)

Documents

[High level requirements \(Khalilah\)](#)

Use cases

| # | use case | description | process of permitting or denying | provided by |
|---|----------------------|--|---|---------------------------------------|
| 1 | Timezone Management | Libraries in different timezones need to be aware of their individual timezone in order to properly calculate fines and due dates | ideally, administrators could be designated for the library to control the timezone and other settings for that library, but not others. but I don't know if that is an absolute requirement. | Erin Nettifee (Duke) |
| 2 | Currency Management | Libraries can be allowed to set their own default currency for purchases and transactions (e.g., RMB in China, Dollars in the US) | ideally, administrators could be designated for the library to control the current settings for that library, but not others. but I don't know if that is an absolute requirement. | Erin Nettifee (Duke) |
| 3 | Courses App | If a staff member works at a specific library or specific campus, they only see the course reserves information for that library or campus, and can only edit / manage the courses for that library or campus. | if controls are at institution level, you would need an option at the institution level to specify whether courses for that institution could be shared. you would also need to associate a specific set of courses to the institution so that the courses app would know which courses to apply restrictions to | Erin Nettifee (Duke) |
| 4 | Locations Management | If a library staff member is administrator for a specific library or campus, they should only be able to add, edit, or delete locations for their specific library or campus. This would contribute to a model where location management could be pushed outward to staff who are actually doing stacks management, as opposed to IT. | | Erin Nettifee (Duke) |
| 5 | Organizations App | As an acquisitions librarian working at a specific branch library within a single tenant I can only see organizations used by this library. I may have different contact people than another library within this tenant. | I need a way to relate organizations as well as system users to different libraries. There may be system users who have access to all organizations within the tenant. This could be managed via library codes or numbers that are added to the organization records and system user records. | Martina Schildt (GBV) |

| | | | | |
|----|-----------------|--|---|---|
| 6 | Orders | | <ul style="list-style-type: none"> • library codes <ul style="list-style-type: none"> • in LBS4 libraries within a single tenant have "library codes" (# between 0 and 255) • the system users only have access to funds, budgets and vendors of the library they are working at • if library code is "0", there is no library affiliation existing • in general, orders are created only for the own library; further permissions can be granted • Specific approval <ul style="list-style-type: none"> • if users are marked as have "specific approval", they can view and edit orders of all libraries within that tenant • acquisition staff <ul style="list-style-type: none"> • if users are marked as "acquisition staff", they can view and edit orders of all libraries within that tenant. In addition, the orders those users created automatically have library code "0", which means they are related to no specific library and can be viewed by everyone • other libraries <ul style="list-style-type: none"> • if users are marked as "other libraries", they can view orders of other (=all) libraries within that tenant • user types <ul style="list-style-type: none"> • users are categorized into different user types: system admin, institutional admin and normal user | Martina Schildt (GBV) / Peter Sbrzesny (GBV) |
| 7 | Funds | I can restrict users to only see their own library's funds and budgets. In consequence, they can only use their library's budgets for orders and payments. | User records and fund/budget records can be related to specific libraries by adding a library code/number to them. The user then has only access to funds of his library. When Library code is "0" the user or the fund do not belong to a specific library. | Martina Schildt (GBV) |
| 8 | Permission Sets | I can grant users the ability to assign certain permission sets while restricting others. | Managers at libraries can assign permission set that concern local operations, but are restricted from assigning permission sets that affect consortium settings. For example, a library could be permitted to assign a permission set that allows check in and check out, but not one that allows altering of circulation rules. | Aaron Neslin (5C) |
| 9 | Reporting | I can restrict users teams to only see their own library's funds , budgets and payments in reporting. | Some vendors may restrict the terms of a license. When a user runs a report, I need to be able to limit the data returned to data they have access to in Folio through their team | Aaron Neslin (5C) |
| 10 | eholdings | Only show my institution or library eholdings. Can only see another institution or library eholdings if permission assigned. | Will need to apply a permission that allows libraries to see each others eHoldings and/or CRUD another libraries eholdings. | Khalilah Gambrell |
| 11 | vendors | I can restrict users to only see their own library's vendors. In consequence, they can only use their library's vendors for orders. | User records and vendor records can be related to specific libraries by adding a library code/number to them. The user then has only access to vendors of his library. When Library code is "0" the user or the vendor do not belong to a specific library. | Peter Sbrzesny (GBV) |