

Sample Permissions Sets from Implementing Institutions

As implementing institutions are testing their user permission setups, it would be great if they could share the permission sets that they created, to help others not have to recreate the same thing.

Please edit this page and add permission sets as you create them. Thank you!

Name of Permission Set	Description - what is the permission set intended to be used for?	Permissions that are included in the set (include/attach JSON if you have it)	Version of FOLIO that these sets were developed for	Apps that this permission set is intended to be used with	Your Institution and Contact Info
Print resource cataloguing	For all users working with cataloguing of print resources (monographs and serials).	<pre> "subPermissions": ["ui-inventory.all-permissions.TEMPORARY", "ui-inventory.settings.electronic-access-relationships", "ui-inventory.settings.statistical-codes", "ui-inventory.settings.statistical-code-types", "ui-inventory.settings.materialtypes", "ui-inventory.settings.instance-types", "ui-inventory.settings.modes-of-issuance", "ui-inventory.settings.nature-of-content-terms", "ui-inventory.settings.loantypes", "ui-inventory.settings.item-note-types", "ui-inventory.settings.instance-statuses", "ui-inventory.settings.instance-note-types", "ui-inventory.settings.identifier-types", "ui-inventory.settings.classification-types", "ui-inventory.settings.ill-policies", "ui-inventory.settings.holdings-types", "ui-inventory.settings.holdings-note-types", "ui-inventory.settings.instance-formats", "ui-inventory.settings.contributor-types", "ui-inventory.settings.call-number-types", "ui-inventory.settings.alternative-title-types"] </pre>	Set created for 2019 Q3. 1, continuously updated for new releases	Inventory	Chalmers University of Technology lisa.sjogren@chalmers.se

Print Resource acquisition	For all users working with acquisition of print resources (monographs and serials).	<pre> "subPermissions": ["ui-organizations.delete", "ui-notes.item.create", "ui-notes.item.edit", "ui-notes.item.assign-unassign", "ui-organizations.update", "ui-orders.acq.unit.assignment.manage", "ui-orders.check-in", "ui-orders.receiving", "module.notes.enabled", "ui-orders.acq.unit.assignment.assign", "ui-orders.order.delete", "ui-finance.acq.unit.assignment.manage", "settings.orders.enabled", "ui-notes.item.delete", "ui-orders.order.create", "ui-organizations.edit", "ui-organizations.create", "module.orders.enabled", "ui-orders.order-lines.delete", "ui-finance.acq.unit.assignment.assign", "ui-organizations.all", "module.organizations.enabled", "ui-orders.order.edit", "ui-inventory.all-permissions.TEMPORARY", "ui-orders.order.view", "ui-orders.order-lines.edit", "ui-notes.item.view", "ui-orders.order-lines.create", "ui-orders.order-lines.view"] </pre>	Set created for 2019 Q3. 1, continuously updated for new releases	Inventory, Orders, Organizations	Chalmers University of Technology lisa.sjogren@chalmers.se
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Electronic resource management	For users who manage electronic resources.	<pre> "subPermissions": ["fse.erm.secure", "ui-organizations.settings", "ui-organizations.delete", "ui-organizations.create", "ui-organizations.edit", "ui-organizations.view", "ui-organizations.update", "agreements.admin", "agreements.user", "ui-agreements.agreements.create", "ui-agreements.agreements.edit", "ui-agreements.agreements.view", "ui-eholdings.titles-packages.create-delete", "ui-eholdings.records.edit", "ui-eholdings.package-title.select-unselect", "ui-erm-usage.view", "ui-licenses.licenses.edit", "ui-licenses.licenses.view", "ui-notes.item.assign-unassign", "ui-notes.item.create", "ui-notes.item.delete", "ui-notes.item.edit", "ui-notes.item.view", "ui-organizations.all", "ui-organizations.creds.view", "ui-organizations.creds.manage", "settings.agreements.enabled", "ui-eholdings.settings.kb", "ui-eholdings.settings.root-proxy", "settings.licenses.enabled", "settings.notes.enabled", "settings.organizations.enabled", "settings.tags.enabled", "module.search.enabled", "module.eholdings.enabled", "module.organizations.enabled", "module.agreements.enabled", "module.notes.enabled", "ui-users.view"] </pre>	Set created for 2019 Q3. 1, continuously updated for new releases		Chalmers University of Technology lisa.sjogren@chalmers.se
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ERM view only	For users that look at but never edit agreements and licenses. E.g. staff who work with publishing support for researchers.	<pre> "subPermissions": ["agreements.user", "ui-erm-usage.view", "module.agreements.enabled", "ui-notes.item.view", "ui-licenses.licenses.view", "mod-agreements.user", "ui-organizations.view", "mod-licenses.user", "ui-notes.item.create", "ui-agreements.agreements.view", "ermusage.view"] </pre>	Set created for 2019 Q3. 1, continuously updated for new releases		Chalmers University of Technology lisa.sjogren@chalmers.se
Circulation	For all users who work in the circulation desk.	<pre> "subPermissions": ["ui-checkin.all", "ui-requests.all", "ui-users.loans.all", "ui-users.patron_blocks", "module.notes.enabled", "ui-notes.item.delete", "ui-users.manual_patron_blocks", "ui-inventory.all-permissions.TEMPORARY", "settings.notes.enabled", "ui-users.viewuserservicepoints", "ui-users.create", "ui-notes.item.view", "ui-checkout.all", "ui-users.requests.all", "ui-users.viewperms", "ui-users.edit", "ui-notes.item.create", "ui-users.view", "ui-notes.item.edit", "ui-notes.item.assign-unassign", "ui-users.viewproxies", "ui-users.reset-password-link.send"] </pre>	Set created for 2019 Q3. 1, continuously updated for new releases	Check in, Check out, Requests, Users, Inventory	Chalmers University of Technology lisa.sjogren@chalmers.se

<p>ERM Administration</p>	<p>These sets are from our ERM only implementation. Feedback appreciated!</p> <p>This adds a couple of settings permissions to our ERM User set. I assign all the ERM folks the User set and then a couple of people get this set. Not sure if this layered method is what is envisioned by the SIG?</p> <p>I added some note and order perms in here because we were getting note and order permission errors I didn't fully understand, we aren't actually using orders yet.</p>	<p>1. eHoldings: Can create and delete custom packages and titles</p> <ul style="list-style-type: none"> • eHoldings: Can edit providers, packages, titles detail records • eHoldings: Can select /unselect packages and titles to/from your holdings • Licenses: Manage license terms • Notes: Can assign and unassign a note • Notes: Can create a note • Notes: Can delete a note • Notes: Can edit a note • Notes: Can view a note • Orders: View order lines • Settings (Agreements): Can view and edit settings • Settings (eHoldings): configure EBSCO RM API credentials • Settings (eHoldings): configure root proxy setting • Settings (erm-usage): display list of settings pages • Settings (notes): display list of settings pages • Settings (Tags): display list of settings pages • UI: ui-notes module is enabled 		<p>eholdings, Licenses, Notes, Orders, Settings, UI</p>	<p>Cornell University</p> <p>jr688 at cornell dot edu</p>
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ERM User	<p>Standard set for users of our ERM only instance, see notes above.</p> <p>This set also incorporates general permissions for things users want to do to themselves. If this were not an ERM only instance, perhaps that set should have been broken out further into a generic user set?</p> <p>ermusage is in here so people can see it but we aren't using it as far as i know.</p>	<ul style="list-style-type: none"> • Agreements: Delete agreements • Agreements: Edit agreements • Agreements: Search & view agreements • Agreements: Search & view e-resources • eHoldings: Can create and delete custom packages and titles • eHoldings: Can edit providers, packages, titles detail records • eHoldings: Can select /unselect packages and titles to/from your holdings • ermusage all • ermusage user • ermusage view • eUsage: Can view usage data providers and COUNTER reports • Licenses: Delete licenses • Licenses: Edit licenses • Licenses: Search & view licenses • Notes: Can assign and unassign a note • Notes: Can create a note • Notes: Can delete a note • Notes: Can edit a note • Notes: Can view a note • Orders: Assign acquisition units to new order • Orders: Check-in items • Orders: Create order lines • Orders: Create orders • Orders: Delete order lines • Orders: Edit order lines • Orders: Edit orders • Orders: Manage acquisition units • Orders: Receive items • Orders: Remove orders • Orders: View order lines • Orders: View orders • Organizations: Interface usernames and passwords: view • Organizations: Interface usernames and passwords: view, edit, create, delete • Organizations: View • Organizations: View, edit • Organizations: View, edit, create • Organizations: View, edit, delete • Settings (notes): display list of settings pages • UI: eHoldings module is enabled • UI: erm-usage module is enabled • UI: ui-notes module is enabled • Users: Can send create /reset password link • Users: Can view user profile 		Agreements, eHoldings, ermusage, licenses, notes, orders, organizations, UI, users	Cornell University
ERM view only	Only display permissions	<ul style="list-style-type: none"> • Agreements: Search & view agreements • Agreements: Search & view e-resources • Find Agreement Plugin: Search agreements • Licenses: Search & view licenses • Notes: Can view a note • Organizations: Interface usernames and passwords: view • Organizations: View • Settings (My profile): Can change your local password • Settings (notes): display list of settings pages • UI: ui-notes module is enabled • Users: Can view user profile • Orders: View orders • Orders: View order lines 	Edelweiss	Agreements, Licenses, Users, Orders, Organizations, Notes	ZBW, Kiel /Hamburg Slack: @felix

ERM user	Permissions for ERM users	<ul style="list-style-type: none"> • Agreements: Edit agreements • Agreements: Search & view agreements • Agreements: Search & view e-resources • Find License Plugin: Search licenses • Licenses: Search & view licenses • Licenses: Edit licenses • Notes: Can assign and unassign a note • Notes: Can create a note • Notes: Can delete a note • Notes: Can edit a note • Notes: Can view a note • Orders: Assign acquisition units to new order • Orders: Check-in items • Orders: Create order lines • Orders: Create orders • Orders: Delete order lines • Orders: Edit order lines • Orders: Edit orders • Orders: Manage acquisition units • Orders: Receive items • Orders: Remove orders • Orders: View order lines • Orders: View orders • Organizations: Interface usernames and passwords: view, edit, create, delete • Organizations: View, edit, create • Settings (My profile): Can change your local password • Settings (notes): display list of settings pages • Settings (Orders): Display list of settings for Orders • UI: Orders module is enabled • UI: ui-notes module is enabled • Users: Can view user profile 	Edelweiss	Agreements, Licenses, Users, Orders, Organizations, Notes, Settings	ZBW, Kiel /Hamburg Slack: @felix
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ERM admin	Permission set for the ERM admin. Contains all authorizations from ERM user and also permissions for system settings.	<ul style="list-style-type: none"> • Agreements: Delete agreements • Agreements: Edit agreements • Agreements: Search & view agreements • Agreements: Search & view e-resources • Find License Plugin: Search licenses • Licenses: Manage license terms • Licenses: Manage pick lists and values • Licenses: Search & view licenses • Licenses: Delete licenses • Licenses: Edit licenses • Notes: Can assign and unassign a note • Notes: Can create a note • Notes: Can delete a note • Notes: Can edit a note • Notes: Can view a note • Orders: Assign acquisition units to new order • Orders: Check-in items • Orders: Create order lines • Orders: Create orders • Orders: Delete order lines • Orders: Edit order lines • Orders: Edit orders • Orders: Manage acquisition units • Orders: Receive items • Orders: Remove orders • Orders: View order lines • Orders: View orders • Organizations: Interface usernames and passwords: view, edit, create, delete • Organizations: View, edit, create • Organizations: View, edit, delete • Settings (Agreements): Can view and edit settings • Local KB admin: Create jobs • Local KB admin: Delete jobs • Local KB admin: View jobs • Local KB admin: Manage remote KB configuration • Settings (My profile): Can change your local password • Settings (notes): display list of settings pages • Settings (Orders): Display list of settings for Orders • UI: Orders module is enabled • UI: ui-notes module is enabled • Users: Can view user profile 	Edelweiss	Agreements, Licenses, Users, Orders, Organizations, Notes, Settings, Local KB Admin	ZBW, Kiel /Hamburg Slack: @felix
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