

# Permission sets

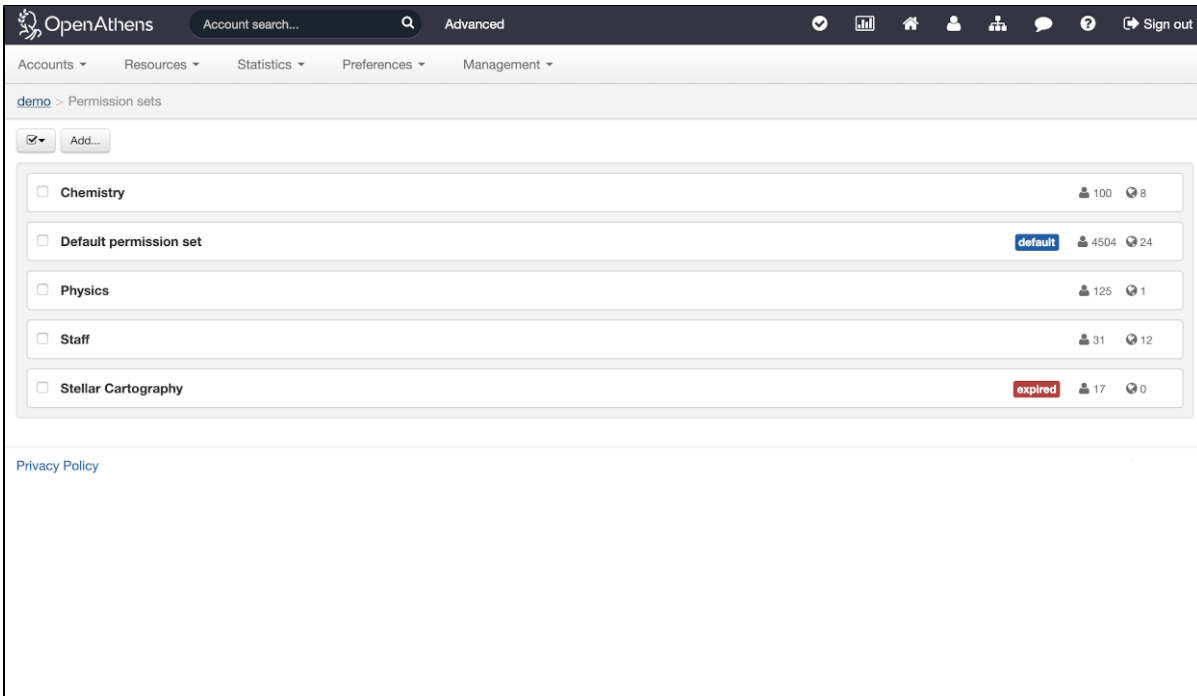
Path to function: *Resources > Permission sets*

Permission sets can be used for several things:

- As sets of accounts for [reporting](#) at the organisation level.
- As a way of assigning attributes such as 'role' to sets of users - e.g. member, staff, walk-in user. You must, in fact, allocate at least one permission set to everyone because of this and your initial setup will have included a default permission set for this purpose.
- With [restrictive mode](#) to limit with resources are available to sets of users. When used this way any changes you make to the resources allocated to a permission set instantly changes what the related accounts can access.

Permission sets can only apply to user accounts under the same organisation - any [sub-organisations](#) you have will need at least one permission set of their own.

The first thing you will see is a list of any existing permission sets.



Each line will display a description of the set and some other information such as the number of accounts it is assigned to and the number of resources assigned to it - clicking on either will take you to a list of those accounts or resources. Clicking on the permission set description will allow you to edit the sets details (see below).

## Adding a permission set

After clicking on the add button you will be prompted for a description and name for your new permission set:

**Create a permission set under 'Your organisation name here'.** ✕

Description\*

Name\*  ?

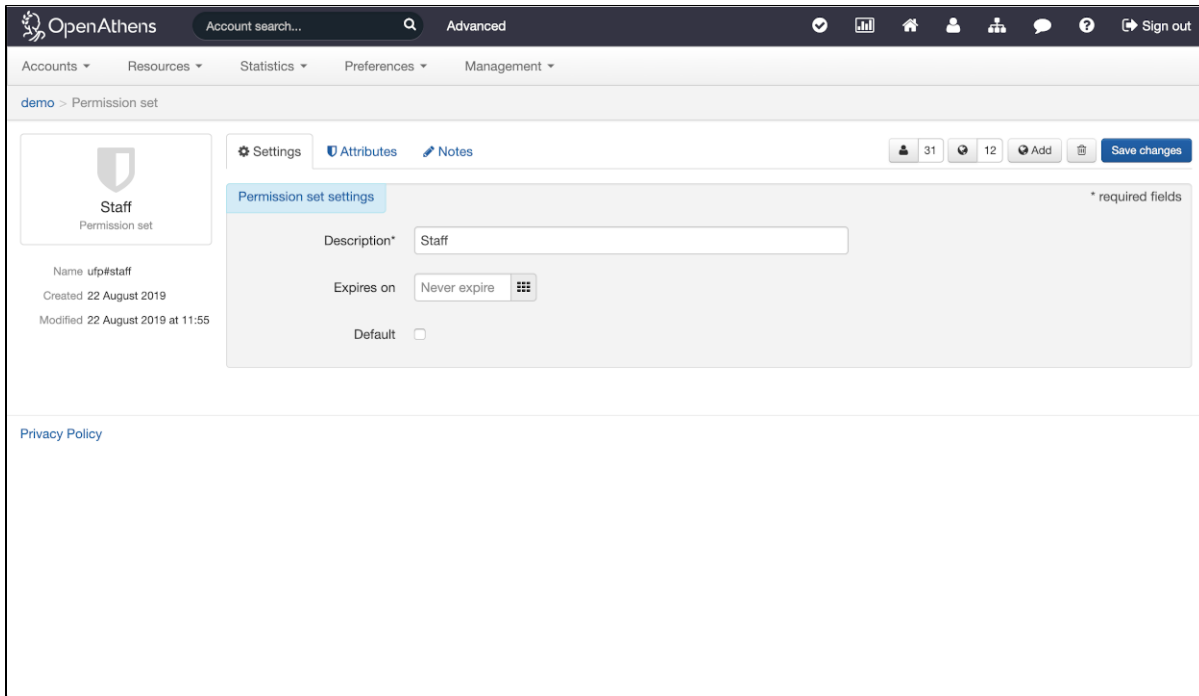
\* required fields

The name is automatically generated based on the description, but you can change it if you wish. The name is used in [data downloads](#) and [bulk uploads](#), but you are unlikely to see it anywhere else. Permission set names, like account username, cannot be modified once created.

Once you click the create button you are taken to the modify page for your new permission set. This is the same page you would see if you clicked on the description of an existing permission set.

## Modifying a permission set

If you click the description of a permission set, you can modify it.



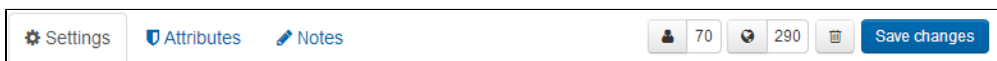
The screenshot shows the OpenAthens interface for editing a permission set named 'Staff'. The page has a dark header with the OpenAthens logo and navigation links. Below the header, there are tabs for 'Settings', 'Attributes', and 'Notes', with 'Settings' being the active tab. The 'Settings' section includes a 'Description\*' field with the value 'Staff', an 'Expires on' dropdown menu set to 'Never expire', and a 'Default' checkbox which is unchecked. To the right of the settings, there are buttons for 'Add', 'Remove', and 'Save changes'. Above these buttons, there are indicators for 31 accounts and 12 resources. On the left side of the page, there is a sidebar showing the permission set's name 'Staff', its description 'Permission set', and its creation and modification dates: 'Created 22 August 2019' and 'Modified 22 August 2019 at 11:55'. A 'Privacy Policy' link is also visible at the bottom of the sidebar.

The sidebar shows you the description, name, creation time and modification time of the permission set

The Settings tab allows you to modify the description and expiry date for a permission set. Permission sets do not have to have an expiry date and default to a never expire setting; setting an expiry date on a permission set is kinda pointless to be honest and I have no good explanation as to why they have an expiry date at all. To change an expiry date to never expire: delete the expiry date.

The Attributes tab gives you control over the roles and entitlements that can be passed to federated resources. Unless you specifically want to not pass a role for a user you will need to have a value here. The default of 'member' is usually correct.

At the top right there is a display of the number of connected accounts and resources. Buttons beside the numbers let you view which accounts and resources are associated with that permission set.



This close-up shows the top right section of the settings page. It features three tabs: 'Settings', 'Attributes', and 'Notes'. To the right of the tabs, there are two buttons: one with a person icon and the number '70', and another with a globe icon and the number '290'. A 'Save changes' button is located to the right of these buttons.

## Modifying a permission set's allocation to accounts

From the allocated to accounts button on either the permission set in the list or on the modify page you will be taken to a preset search for accounts that have that permission set. From here you have access to all the same [actions](#) as any other [search](#) including allocate and revoke permission sets. Allocating *this* permission set to accounts though is done from any other search or list view that identifies the accounts that should have this set.

Username	Last name	Email address	Expiry date	Status
ufpaabb002	Abbott	annie.abbott@institution.ac.uk	22 February 2021	active
ufpabaird001	Baird	annie.baird@institution.ac.uk	22 February 2021	not activated
ufpabaldwin001	Baldwin	anna.baldwin@institution.ac.uk	22 February 2021	not activated
ufpabarber001	Barber	anna.barber@institution.ac.uk	22 February 2021	not activated
ufpambartlett001	Bartlett	margaret-ann.bartlett@hotmail.com	22 February 2021	active
ufpabrewer001	Brewer	anna.brewer@outlook.com	22 February 2021	not activated
ufpabrown001	Brown	annie.brown@institution.ac.uk	22 February 2021	not activated
ufpbush001	Bush	mary-ann.bush@gmail.com	22 February 2021	active
ufpacobb002	Cobb	anne.cobb@gmail.com	22 February 2021	not activated
ufpacrawford001	Crawford	annabella.crawford@institution.ac...	22 February 2021	not activated
ufpaestes004	Estes	anna.estes@domain.com	22 February 2021	not activated
ufpagibson002	Gibson	anna.gibson@gmail.com	22 February 2021	not activated
ufpagriffith001	Griffith	anna.griffith@institution.ac.uk	22 February 2021	not activated
ufpaholloway001	Holloway	anna.holloway@gmail.com	22 February 2021	active
ufpahorne001	Horne	annalee.horne@outlook.com	22 February 2021	not activated
ufpaijfferson001	Jefferson	annabell.jefferson@institution.ac.uk	22 February 2021	not activated

If you have connected a [local authentication source](#), permission sets will be assigned there instead.

## Resource allocation

If you are using permission sets to restrict access you will want to be able to view and allocate resources.

### Viewing the resource allocation

From the allocated to accounts button on either the permission set in the list or on the modify page you will be taken to a filtered view of the allocated tab in the resource catalogue. This view will let you easily remove resources from the permission set. You can also add others from the 'All' tab, but you will find it easier to use the Add button (see below).

The screenshot shows the OpenAthens interface. At the top, there's a navigation bar with 'Accounts', 'Resources', 'Statistics', 'Preferences', and 'Management'. Below that, the breadcrumb is 'demo > Resource catalogue'. There are tabs for 'All', 'Allocated (9)', and 'Custom (2)'. A search bar contains 'permission-set:ufp#staff'. The main area displays a grid of resource cards, each with a logo, title, description, and an 'Allocated...' button. The resources include:

- 123doc**: 123Doc Qbanks, high-quality online practice questions and revision...
- American Physiological Society**: The American Physiological Society publishes highly regarded, peer-reviewed...
- American Psychological Association**: The search platform designed to deliver...
- BMJ Best Practice**: BMJ Best Practice gives medical professionals the best available...
- Copyright Clearance Center and RightsDirect**: Provides access to Copyright Clearance...
- Dar AlMandumah**: دار المنطوية
- e-Marefa**: e-Marefa Database is A Leading & Integrated Arab Database of full text &...
- EBSCO Information Services**: Your entire collection of resources in a single search.
- GeoScienceWorld**: GeoScienceWorld (GSW) is a nonprofit collaborative and comprehensive Internet...

This view usefully also allows you to allocate resources to other permission sets which can help with the management of resources - you might even create some permission sets that you never allocated to accounts for this reason.
















### Adding resources to a permission set

On the permission set details page there is an add button beside the list resources button.

This will bring up a list of all the resources that are not already allocated to this permission set - add them to the set by clicking on the add buttons on the relevant resources.

**Add resources to permission set 'cush#other'.**

Search... 1-50 of 249

 <p><b>Pictures</b> The most comprehensive, accurate and... <a href="#">Add...</a></p>	 <p><b>Annals of Internal Medicine</b> Established in 1927 by the American College of Physicians, the Annals of... <a href="#">Add...</a></p>	 <p><b>Annual Reviews</b> Annual Reviews publications are among the most highly cited in the scientific... <a href="#">Add...</a></p>
 <p><b>ASTM Compass</b> Access to ASTM standards <a href="#">Add...</a></p>	 <p><b>Barbour</b> Barbour Environment, Health and Safety (EHS) is a comprehensive... <a href="#">Add...</a></p>	 <p><b>BBC Monitoring</b> BBC Monitoring enables you to keep track of broadcast, press and social media... <a href="#">Add...</a></p>
 <p><b>BMJ Best Practice</b> BMJ Best Practice gives medical professionals the best available... <a href="#">Add...</a></p>	 <p><b>BioOne</b> BioOne is a global, not-for-profit collaboration bringing together scientific... <a href="#">Add...</a></p>	 <p><b>BIR Publications</b> BIR Publications is the publishing arm of the British Institute of Radiology (BIR)... <a href="#">Add...</a></p>
 <p><b>Bloomsbury Digital Resources</b> Digital resources from Bloomsbury Publishing providing scholarly content in... <a href="#">Add...</a></p>	 <p><b>Bloomsbury Professional Online</b> Bloomsbury Professional Online is the chosen online service platform for... <a href="#">Add...</a></p>	 <p><b>BMJ</b> BMJ <a href="#">Add...</a></p>
 <p><b>BMJ Fed Access</b> Created on 20/03/2018</p>	 <p><b>BMJ Learning</b> BMJ Learning offers high-quality</p>	 <p><b>Bone &amp; Joint Publishing</b> The British Editorial Society of Bone &amp; Joint</p>

Close

You can also allocate resources to a permission set [directly from the catalogue](#).

### Anything to watch out for?

Whilst all accounts will need at least one permission set so that they can access resources, restricting access to the resources specified in a permission set requires [restrictive mode](#) be set to on.

Permission set descriptions do not have to be unique, but it helps.

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