WorldShare Admin

For more information about roles and managing accounts, see WorldShare Admin, User management.

To view all available WorldShare roles, see WorldShare Admin, Roles.

Roles

- ERM_ADMIN
- ERM_STAFF
- ERM_SUPERVISOR

License Manager roles and descriptions

<table>
<thead>
<tr>
<th>ROLE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Everyone</td>
<td>This check box must remain selected.</td>
</tr>
<tr>
<td>ERM_ADMIN</td>
<td>Staff members with this role can:</td>
</tr>
<tr>
<td></td>
<td>• Perform all tasks in License Manager</td>
</tr>
<tr>
<td></td>
<td>• Create, edit, and delete other user accounts</td>
</tr>
<tr>
<td></td>
<td>• Perform tasks in Collection Manager, knowledge</td>
</tr>
<tr>
<td></td>
<td>base collections, and in Analytics</td>
</tr>
<tr>
<td>ERM_SUPERVISOR</td>
<td>Staff members with this role can:</td>
</tr>
<tr>
<td></td>
<td>• Perform all tasks in License Manager</td>
</tr>
<tr>
<td>ERM_STAFF</td>
<td>Staff members with this role:</td>
</tr>
<tr>
<td></td>
<td>• Have read-only access but cannot perform tasks</td>
</tr>
<tr>
<td></td>
<td>in License Manager or manage other user accounts</td>
</tr>
</tbody>
</table>
## License Manager role comparison

<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLES</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>ERM ADMIN</td>
</tr>
<tr>
<td>Access your institution’s holdings.</td>
<td>x</td>
</tr>
<tr>
<td>Activate a vendor for use within both Acquisitions and Licenses.</td>
<td>x</td>
</tr>
<tr>
<td>Add comments to a license.</td>
<td>x</td>
</tr>
<tr>
<td>Assign roles to other users. Create a user that automatically has the</td>
<td>x</td>
</tr>
<tr>
<td>Everyone role assigned.</td>
<td></td>
</tr>
<tr>
<td>Browse licenses.</td>
<td>x</td>
</tr>
<tr>
<td>Create users, regardless of module (Circ, Acq, etc.)</td>
<td>x</td>
</tr>
<tr>
<td>Create a vendor.</td>
<td>x</td>
</tr>
<tr>
<td>Delete comments.</td>
<td>x</td>
</tr>
<tr>
<td>Delete users.</td>
<td>x</td>
</tr>
<tr>
<td>Edit comments.</td>
<td>x</td>
</tr>
<tr>
<td>Edit a license.</td>
<td>x</td>
</tr>
<tr>
<td>Edit public vendors (indicated by globe icon) and the public data for</td>
<td>x</td>
</tr>
<tr>
<td>this Vendor, including name, country, etc.</td>
<td></td>
</tr>
<tr>
<td>Edit a template.</td>
<td>x</td>
</tr>
<tr>
<td>Edit vendor data for your library only.</td>
<td>x</td>
</tr>
<tr>
<td>Find a vendor.</td>
<td>x</td>
</tr>
<tr>
<td>Modify your institution’s</td>
<td>x</td>
</tr>
<tr>
<td>ACTION</td>
<td>ROLES</td>
</tr>
<tr>
<td>-----------------------------------------------------------------------</td>
<td>------------------------</td>
</tr>
<tr>
<td></td>
<td>ERM ADMIN</td>
</tr>
<tr>
<td>configuration settings.</td>
<td>x</td>
</tr>
<tr>
<td>Modify your institution’s holdings.</td>
<td>x</td>
</tr>
<tr>
<td>Perform all operations, including assigning roles to users.</td>
<td>x</td>
</tr>
<tr>
<td>Publish a vendor to all libraries.</td>
<td>x</td>
</tr>
<tr>
<td>Read information about self via WorldCat Local/Discovery.</td>
<td>x</td>
</tr>
<tr>
<td>Read information about users, regardless of module (Circ, Acq, etc.)</td>
<td>x x x</td>
</tr>
<tr>
<td>Remove a vendor from your list of active partners (in Acquisitions or License Manager).</td>
<td>x x x</td>
</tr>
<tr>
<td>Retrieve and view users.</td>
<td>x</td>
</tr>
<tr>
<td>Schedule automatic and manual harvests of usage data.</td>
<td>x</td>
</tr>
<tr>
<td>The security context contains all the information about a given user</td>
<td>x</td>
</tr>
<tr>
<td>(especially what actions they can perform). This permission allows the user to perform actions on behalf of another user (patron).</td>
<td>x x x</td>
</tr>
<tr>
<td>Send a one-time alert to any user.</td>
<td>x</td>
</tr>
<tr>
<td>Subscribe to Alerts (configure alerts in the Admin module).</td>
<td>x</td>
</tr>
</tbody>
</table>

https://help.oclc.org/Library_Management/WorldShare_License_Manager/Get_started/Account_roles
Printed: Mon, 06 Apr 2020 08:07:03 GMT
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLES</th>
<th>ERM ADMIN</th>
<th>ERM STAFF</th>
<th>ERM SUPERVISOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trial Licenses button</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Update information about other users, regardless of module (Circ, Acq, etc.)</td>
<td></td>
<td></td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Update information about self via WorldCat Local/Discovery.</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Update institution configuration information relating to authentication and authorization.</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Use the Forgot Password feature to get a new password.</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Use a template to create a new license.</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>View, claim, unclaim, and delete alerts in the menu bar.</td>
<td></td>
<td></td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>View all templates.</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>View the configuration settings for automatic harvests.</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>View information about a user's accounts. In some circumstances this may include identifying information about accounts external to OCLC (e.g. where OCLC receives periodic patron updates from an external system, or where authentication is managed by an external system).</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>View a license.</td>
<td></td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>ACTION</td>
<td>ROLES</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>--------------------------------------------</td>
<td>------------------------</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>ERM ADMIN</td>
<td>ERM STAFF</td>
<td>ERM SUPERVISOR</td>
<td></td>
</tr>
<tr>
<td>View My Library and export data.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>View the results of an automatic and manual harvest.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>View trial license survey results</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>View a vendor.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
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