

University Information Technology Services

Microsoft SharePoint 2016

Groups & Permissions

University Information Technology Services

Learning Technologies, Training & Audiovisual Outreach

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Microsoft SharePoint 2016 Groups & Permissions

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Introduction

This document describes permission groups and levels as well as how to apply them when granting access to your SharePoint 2016 site.

Learning Objectives

After completing the instructions in this booklet, you will be able to:

- Become familiar with default permission groups
- Use permission levels to assign customized access to your site
- Setup groups and modify user membership
- Check permissions and modify as necessary

Default Permission Groups

A group is a set of SharePoint users who all have the same set of permissions that can be managed together. Groups allow you to more easily maintain site access and ensure that those performing similar tasks have the same level of access. A permission level is a set of permissions assigned to a specific group to achieve specific purposes. Three default groups are created when you create your SharePoint site—*Owners, Members,* and *Visitors*. You can also add your own custom groups with varying permission levels, such as Viewers, Designers, and more. The following describes the permission levels assigned to the three groups created by default when creating a SharePoint site:

- **Owners:** The *Owners* permission group is assigned to grant *Full Control* permissions to manage and add content to the site.
- **Members:** The *Members* permission group is assigned to grant *Edit permissions* to the site. The majority of site users will be included in this permission level to edit documents, calendar items, and various other content.
- **Visitors:** The *Visitors* permission group is assigned to grant *Read permissions* to the site, but prevent editing and downloading of list items.

Assigning Permission Levels

When assigning permissions, take into consideration what security controls you want to put in place for your site. Permissions allow you to customize what content can be added, updated, deleted, and viewed and by whom. Permissions should be assigned based on the type of actions your site users will perform on your site. The following is a list of permission levels that may be assigned to groups and individuals:

- Full Control: Has full control and includes all permissions.
- **Design:** Can view, add, update, delete, approve, and customize.
- Edit: Can add, edit and delete lists; can view, add, update and delete list items and documents.
- Contribute: Can view, add, update, and delete list items and documents.
- Read: Can view pages and list items and download documents.
- **View Only:** Can view pages, list items, and documents. Document types with server-side file handlers can be viewed in the browser, but not downloaded.

Adding a User or Group to a Site

- 1. Navigate to the appropriate site and click the **Settings** button (See Figure 1).
- 2. To access the Site Settings window, click Site Settings (See Figure 1).



Figure 1 - Site Settings

3. In the *Site Settings* window, click **Site Permissions**. This will open the *Site Permissions* window.

Site Settings	
Users and Permissions People and groups Site permissions Site app permissions Web Designer Galleries	Look and Feel Title, description, and logo Quick launch Top link bar Tree view Change the look
Site columns Site content types Master pages Composed looks Site Administration	Site Actions Manage site features Enable search configuration export Reset to site definition Delete this site
Regional settings Site libraries and lists User alerts RSS Sites and workspaces Workflow settings Site Closure and Deletion Popularity Trends Term store management	Search Result Sources Result Types Query Rules Schema Search Settings Search and offline availability Configuration Import Configuration Export

Figure 2 - Site Permissions

4. In the *Site Permissions* window, on the *Permissions* tab, you will see a listing of the groups and users who have access to the site, as well as the permission level of each. Click the **Grant Permissions** button on the *Ribbon*.

	Office 365		Kennesaw Te University			
BROWSE	PERMISSIONS					
Delete unique permissions	Grant Permissions	Edit User Permissions	Check Permissions	Permission Levels Request Settings		
Inheritance	Grant	Modify	Check	Manage		
Home Notebook Documen Site conte	ts	Name			Туре	Permission Levels
Recycle Bi	🗌 🗆 Working	g Members		SharePoint Group	Edit	
🔎 EDIT L	INKS	🔲 🗆 Working	g Owners		SharePoint Group	Full Control
		🗌 🗆 Working	y Visitors		SharePoint Group	Read

Figure 3 - Grant Permissions Button

- 5. The *Share site* window opens to allow you to add members and create an email invitation message to notify users about access to the site. The default permission level is set to *Edit*, but you have the opportunity to change the permission level before you send the message.
- 6. Enter the name(s) of the users/groups that you want to add to the site in the **Users/Groups** box. SharePoint will search Active Directory for the names as you type (See Figure 4).
- 7. Include an optional personal message with the invitation (See Figure 4).
- 8. To add users without sending an email invitation or change the default permission level, click **SHOW OPTIONS** (See Figure 4).

Share 'Working S	ite'	×
Only shared with you		
Invite people	Evan R Atkin x Randall Dean x Kathryn Creech Morgan x	
Shared with	Michael Pourreau x Kyle M Williams x	စ္
	Include a personal message with this invitation (Optional).	
	SHOW OPTIONS 8	Cancel

Figure 4 - Share Site Invitation

- 9. To disable the email invitation, click the **checkbox** to uncheck *Send an email invitation* (See Figure 5).
- 10. Click the **drop-down arrow** to select an alternate group or permission level (See Figure 5).
- 11. Click Share (See Figure 5).

Share 'Working !	Site' ×
Only shared with you	
Invite people	Evan R Atkin x Randall Dean x Kathryn Creech Morgan x
Shared with	Michael Pourreau x Kyle M Williams x
	Include a personal message with this invitation (Optional).
(HIDE OPTIONS
	Select a permission level
	Share Cancel

Figure 5 - Site Share Options

12. You can also share with others by clicking **Share** in the toolbar.

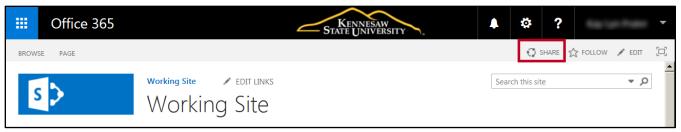


Figure 6 - Click Share

13. This takes you directly to the *Share site* window to allow you to invite others to your site and view who the site is currently being shared with.

9	Share 'Working Site'											
Shared with 🗌 Randall Dean, 🗋 Michael Pourreau, 🗌 Kyle M Williams, and 2 more												
	Invite people	Enter names or email addresses										
	Shared with											
		Include a personal message with this invitation (Optional).										
		Share	ancel									

Figure 7 - Share Site Window

Modifying Permissions on a Site

1. To easily view who you have shared your site with, navigate to the site and click **SHARE** in the toolbar.



Figure 8 - Click Share

2. The *Share site* window will open to allow you to invite others to your site and view who the site is currently being shared with.

Share 'Working S	ite'	×
Shared with 🗆 Randall D	Dean, 🗌 Michael Pourreau, 🗌 Kyle M Williams, and 2 more	
Invite people Shared with	Enter names or email addresses	
	Include a personal message with this invitation (Optional).	
	SHOW OPTIONS Share Cance	el

Figure 9 - Share Site Window

- 3. Click **Shared with** to view advanced options or to send an email to all with whom you have shared your site (See Figure 10).
 - a. Click **EMAIL EVERYONE** to create and send an email to everyone with whom you have shared your site (See Figure 10).
 - b. Click **ADVANCED** to access site permissions to change permissions (See Figure 10).

Share 'Working Site'		×							
Shared with 🗆 Randall Dean, 🗆 Micha	ael Pourreau, \Box Kyle M Williams, and 2 more								
Invite people 3 Shared with 3 Construction C	Evan R Atkin IT Systems Support Pro III - Technology Trainer, University Information Technology Services Kathryn Creech Morgan IT Systems Support Prof III & Part-Time Instructor of Technical Communication, University Information Technology Services Kay Lyn Prater	•							
		Close							
Figure 10 - Shared With									

4. Click **Advanced** to open the *Site Permissions* window. From here, you can grant permissions to individuals, create a new group, edit permissions levels and membership to the entire group.

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BROWSE	PERMISSIONS									😲 SHARE 😭	FOLLOW	
Delete unique permissions	Grant Permissions Gr	eate Edit User Permissions	Remove User Permissions	Check Permissions	Permission Levels							
Inheritance	Grant	M	odify	Check	Manage							
Home Notebook Document	ts		Name				Туре	Permission Levels				
Site conte			🗆 Brian Jo	hnson			User	Edit				
Recycle Bi			Working	g Members			SharePoint Group	Edit				
EDIT LINKS			Working	g Owners			SharePoint Group	Full Control				
			Working	g Visitors			SharePoint Group	Read				

Figure 11 - Permissions Window

- 5. Click the **checkbox** next to the user or group that you want to change (See Figure 12).
- 6. Click the Edit User Permissions button on the Ribbon (See Figure 12).

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BROWSE	PERMISSION	IS	6									Q	SHARE 🟠 FOLLON	< []]
Delete unique permissions	Grant Permissions	Create Group	Edit User	Remove User Permissions	Check Permissions	Permission Levels Request Settings								
Inheritance	Gran	t	Mo	dify	Check	Manage								
Home														
Notebook	C													
Documen	ts			Name				Туре	Permission Levels					
Site conte	ents		6	Brian Jo	hason			User	Edit					
Recycle B	in													
				Working	g Members			SharePoint Group	Edit					
EDIT L	INKS			Working	g Owners			SharePoint Group	Full Control					
				Working	g Visitors			SharePoint Group	Read					

Figure 12 - Edit User Permissions

- 7. In the *Edit Permissions* window, check the **appropriate boxes** (See Figure 13).
- 8. Click **OK** (See Figure 13).

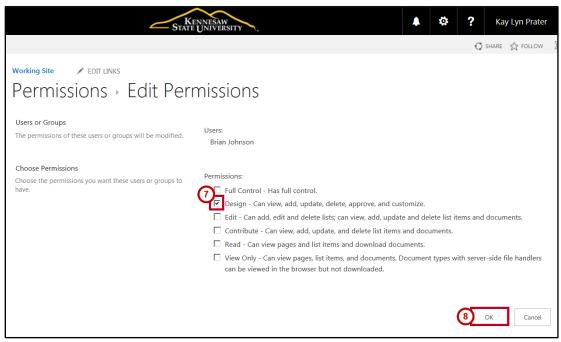


Figure 13 - Edit Permissions

Creating a Group

If you have appropriate permissions, you can create new groups which you can then add to sites. Once a group has been created, it can be added to any number of sites while given different permissions on each site. Since it is quicker to add a group to a site than to add individuals, there may be times when you even want to create a group with only one member.

- 1. Navigate to the appropriate site and click the **Settings** button (See Figure 14).
- 2. To access the Site Settings window, click Site Settings (See Figure 14).

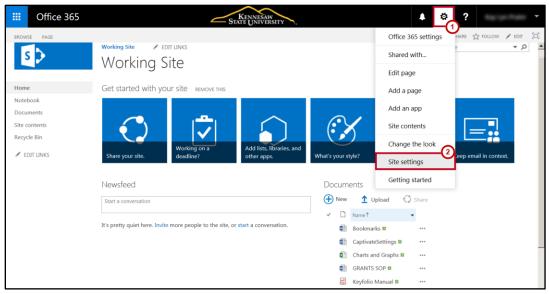


Figure 14 - Site Settings

3. In the Site Settings window, click Site Permissions. This will open the Site Permissions window.

Site Settings	
Users and Permissions People and groups Site permissions Site app permissions Web Designer Galleries Site columns	Look and Feel Title, description, and logo Quick launch Top link bar Tree view Change the look
Site content types Master pages Composed looks	Site Actions Manage site features Enable search configuration export Reset to site definition

Figure 15 - Site Permissions

4. In the *Site Permissions* window, on the Permissions tab, you will see a listing of the groups and users who have access to the site, and the permission level of each. Click the **Create Group** button on the *Ribbon*.

=	Office 36	5			STA	Kennesaw TE UNIVERSIT	Y .		4	¢	?	in e	-	•
BROWSE	PERMISSIONS										🥥 s	HARE 🟠 FC	LLOW	
Delete unique permissions	Grant Permissions Gr	eate Dermissions	Remove User Permissions	Check Permissions	Permission Levels									
Inheritance	Grant	м	lodify	Check	Manage									
Home Notebook Documen Site conte Recycle B	ts ents		U Working	g Members			<mark>Type</mark> SharePoint Group	Permission Levels Edit						
🔎 EDIT L	INKS		Working	g Owners			SharePoint Group	Full Control						
			U Working	g Visitors			SharePoint Group	Read						

Figure 16 - Create Group

5. The *Create Group* page opens. Enter a **name** and a **description** for the group in the appropriate fields.

People and Groups + Create Group ©				
Name and About Me Description Type a name and description for the group.	group.			
	About Me:			
	X 🗈 🏝 Ay 1 🤊 🥙 1 🎟 🤤 🖶 📾 📰 1 🕵 🐼 🗒			
	A A3 B Z U 臣 吾 吾 任 任 律 律 ▲ ⑳ > ▼ 乘			

Figure 17 - Enter Name and Description

- 6. In the *Group Owner* field, the ID of the person creating the group appears. The group owner can change anything about the group such as adding and removing members or deleting the group. There may be only one user or group listed as the *Group Owner*. To change the group owner:
 - a. Enter the **ID or last name** of a person, or a part of the name of an existing group in the *Group owner* box (See Figure 18).
 - b. Select a **name** from the resulting list (See Figure 18).
 - c. Click **Delete (x)** to remove the original group owner (See Figure 18).

Group owner: Kay Lyn Prater X LTAO	
LTAO C LTAO Members	6
LTAO Owners	Q
LTAO Visitors	
Showing 4 results	

Figure 18 - Change Group Owner

- 7. In the *Group Settings* section, specify who can **view and edit** the membership of the group (See Figure 19).
- In the *Membership Requests* section, specify whether to allow users to request to join/leave the group. If you answer *Yes*, enter the email address of the person who will receive the requests

(See Figure 19).

9. Make sure No is selected under Auto-accept requests (See Figure 19).

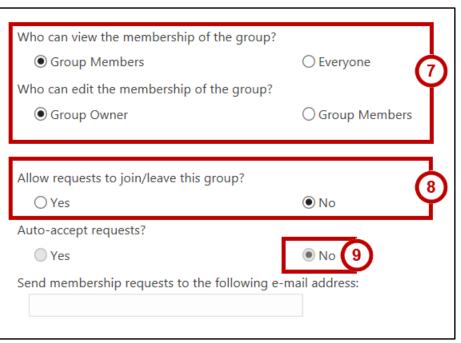


Figure 19 - Group Settings & Membership Requests

10. In the *Give Group Permission to this Site* section, click the **checkbox** for the level of permission that you want to give to this group on this site (See Figure 20).

Note: This group can be added to other sites and assigned different permissions.

11. Click the Create button (See Figure 20).



Figure 20 - Assign Group Permission

Modifying a Group

Adding a User to a Group

- 1. Navigate to the site and click **Settings**.
- 2. The Settings will open. Click Site Settings.
- 3. On the Site Settings page under Users and Permissions, click People and Groups.
- 4. In the *People and Groups* window under *Groups*, click the **name** of the group you want to modify. In the example, **Working Members** is selected.

S	Working Site PEDIT LINKS People and Groups Working Members ©				Search this site
Groups Working Members	New	 Actions - Settin 	gs 👻		View: Detail View -
Working Owners	0	Name Name	About me	Title	Department
Working Visitors More		🗆 Evan R Atkin	IT Technical Trainer at KSU	IT Systems Support Pro III - Technology Trainer	University Information Technology Services
Home Notebook		Kathryn Creech Morgan		IT Systems Support Prof III & Part-Time Instructor of Technical Communication	University Information Technology Services
Documents		Kay Lyn Prater		IT System Support Prof II - Technology Trainer	University Information Technology Services
Site contents Recycle Bin		□ Kyle M Williams		Technology Trainer	University Information Technology Services
🖋 EDIT LINKS		Michael Pourreau		Assistant Director	University Information Technology Services
		🗆 Randall Dean		IT System Support Prof III - Technology Trainer	University Information Technology Services

Figure 21 - Select Group

- 5. Click the drop-down arrow next to the New button (See Figure 22).
- 6. Click Add Users: Add Users to this group (See Figure 22).



Figure 22 - Add Users

- 7. The *Share site* window opens to allow you to add members to the group. Enter the **name(s)** of the users that you want to add to the group (See Figure 23).
- 8. Include an optional personal message with the invitation (See Figure 23).
- 9. To add users without sending an email invitation or change the default permission level, click **SHOW OPTIONS** (See Figure 23).

Share 'Working S	ite'	×
Only shared with you		
Invite people	Evan R Atkin x Randall Dean x Kathryn Creech Morgan x	
Shared with	Michael Pourreau x Kyle M Williams x	9
	Include a personal message with this invitation (Optional).	8
	Share	Cancel

Figure 23 - Share Site Invitation

- 10. To disable the email invitation, click the **checkbox** to uncheck *Send an email invitation* (See Figure 24).
- 11. Click Share (See Figure 24).

Share 'Working S Only shared with you	Site'	×
Invite people	Evan R Atkin x Randall Dean x Kathryn Creech Morgan x	
Shared with	Michael Pourreau X Kyle M Williams X Include a personal message with this invitation (Optional). HIDE OPTIONS Send an email invitation	
	Send an emain invitation	cel

Figure 24 - Site Share Options

Note: When you add a user to a group, the user is given the same permissions as the group has *on each site to which the group has access*. This means, for instance, if a user is added to a group which has only *Read* permissions to site A, but has *Full Control* on site B, that user will have Full Control on site A as well. Therefore, it is a good idea to check the permissions of a group on all sites before you add a user to a particular group.

Viewing Group Permissions

To check a group's full permissions:

- 1. Navigate to the site, and click the **Settings** button.
- 2. The Settings will open. Click Site Settings.
- 3. On the Site Settings page under *Users and Permissions,* click **People and Groups**.
- 4. In the *Groups* list, click the **name** of the group you want to view (See Figure 25).
- 5. On the *Group* page, click the **drop-down arrow** next to *Settings* (See Figure 25).
- 6. Click View Group Permissions (See Figure 25).

5>	working Pec		Groups → Working Members o	Search this site
Groups 4	New	 Actions - Se 	5 ttings -	View: Detail View -
Working Members Working Owners	0	- Hume	Group Settings Manage settings such as group name and permissions.	Department
Working Visitors More		 Erica Robersoi Evan R Atkin 	View Group Permissions View permissions this group has on sites, lists, and items.	University Information Technology Services
Home Notebook		Kathryn Creec	Make Default Group Make this group the default group for this site. t-Time Instructor of Technical	University Information Technology
Documents		Morgan	Communication	Services
Site contents		Kay Lyn Prater	IT System Support Prof II - Technology Trainer	University Information Technology Services
Recycle Bin		Kyle M Williams	Technology Trainer	University Information Technology Services
EDIT LINKS		Michael Pourreau	Assistant Director	University Information Technology Services
		Randall Dean	IT System Support Prof III - Technology Trainer	University Information Technology Services

Figure 25 - View Group Permissions

- 7. You will see a page with the URL of each site to which the group has access, and the permission level of the group on that site.
- 8. Click **OK** to close the window and return to the *People and Groups* window.

Working Site View Site Collection Permissions: Worki	ng Members
Use this page to view the permission assignments that this SharePoint group has in this site collection this group has access to any sites, lists, or items that inherit permissions from these URLs.	. In addition to the listed URLs,
URL	Permission Level
https://kennesawedu.sharepoint.com/sites/LTAO/Kay/Working	Edit
	ОК

Figure 26 - Group Site Permissions

Deleting a User from a Group

- 1. Navigate to the *appropriate site* and click the **Settings** button.
- 2. The Settings will open. Click Site Settings.
- 3. On the Site Settings page under Users and Permissions, click People and Groups.

- 4. In the *Groups* list, click the **name** of the group you want to edit (See Figure 27).
- 5. Click the checkbox next to the name of the person whom you want to delete (See Figure 27).
- 6. Click the **drop-down arrow** next to *Actions* (See Figure 27).
- 7. Click Remove Users from Group (See Figure 27).

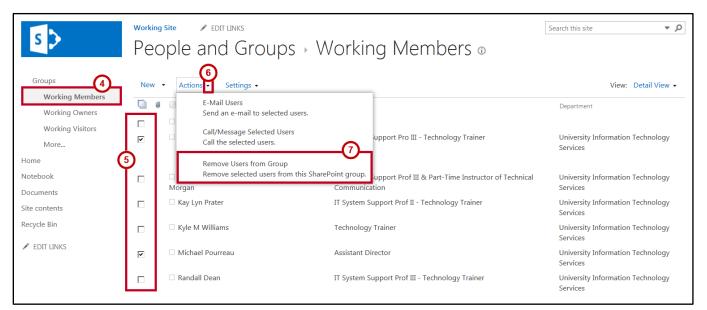


Figure 27 - Select Users to Remove

8. Click **OK** to remove user(s) from the group.

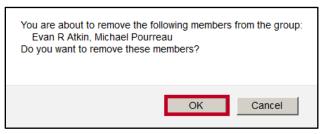


Figure 28 - Remove User

Additional Help

For additional support, please contact the KSU Service Desk:

KSU Service Desk for Faculty & Staff

- Phone: 470-578-6999
- Email: <u>service@kennesaw.edu</u>
- Website: <u>http://uits.kennesaw.edu</u>

KSU Student Helpdesk

- Phone: 470-578-3555
- Email: <u>studenthelpdesk@kennesaw.edu</u>
- Website: <u>http://uits.kennesaw.edu</u>