



University Information
Technology Services

Microsoft SharePoint 2016

Groups & Permissions

University Information Technology Services

Learning Technologies, Training & Audiovisual Outreach

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University Information Technology Services

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.

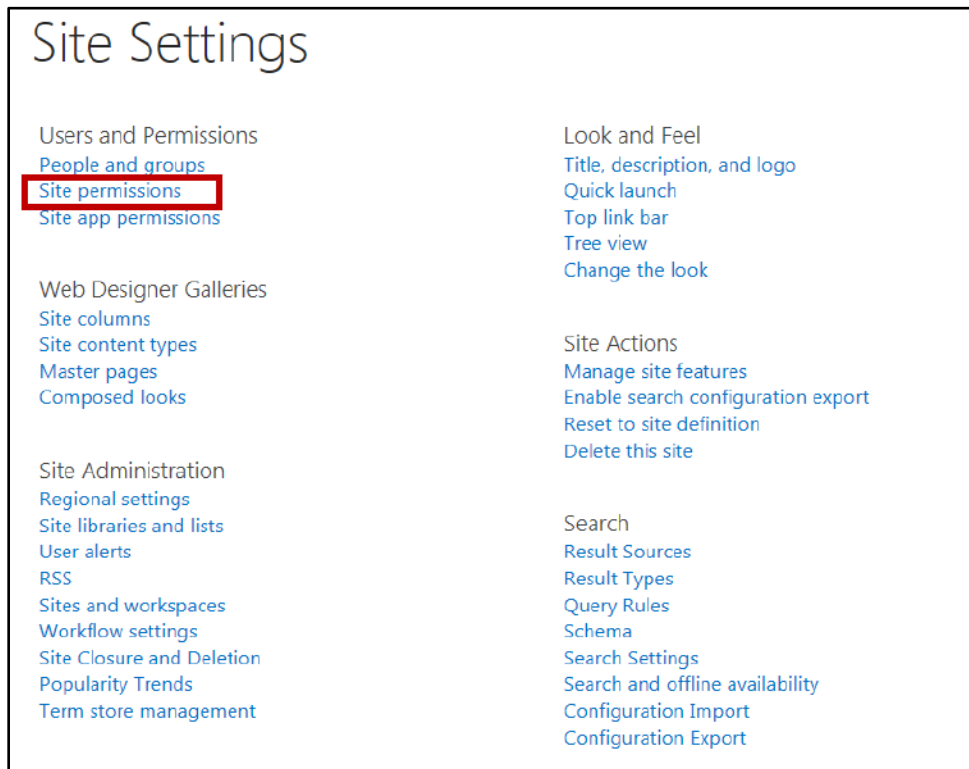


Figure 2 - Site Permissions

- 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*.

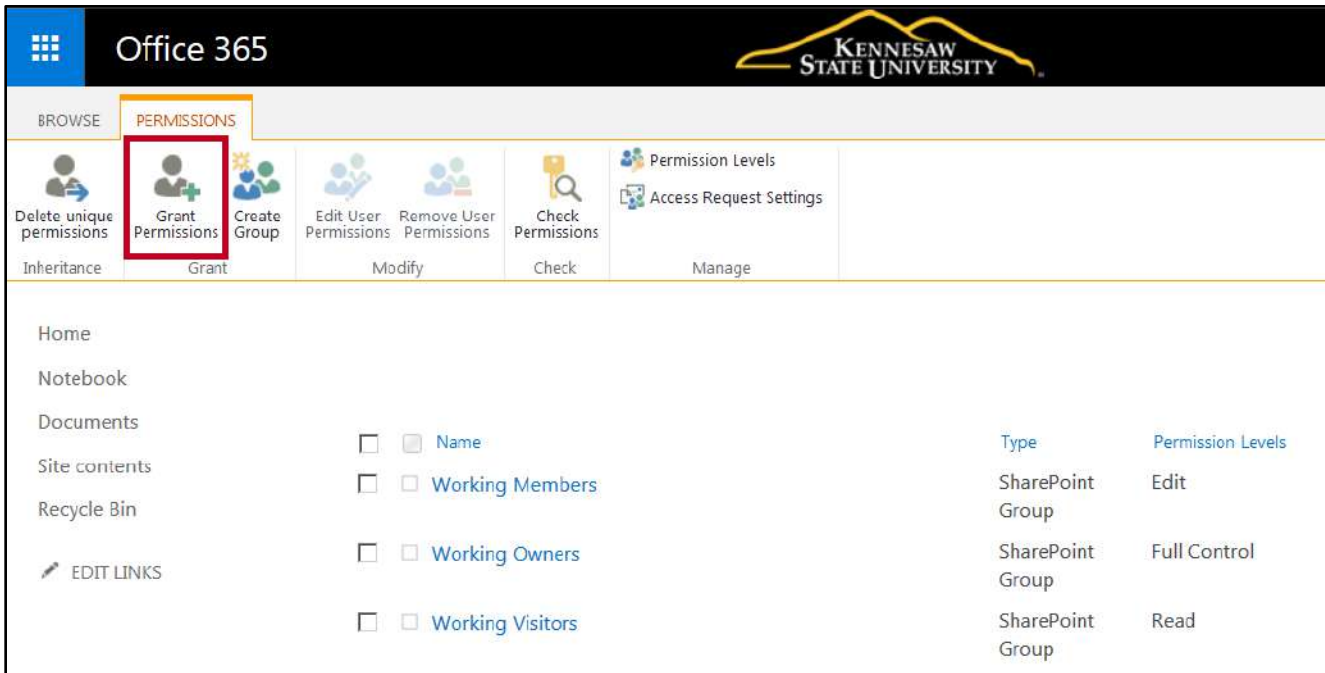


Figure 3 - Grant Permissions Button

- 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.
- 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).
- Include an optional personal message with the invitation (See Figure 4).
- To add users without sending an email invitation or change the default permission level, click **SHOW OPTIONS** (See Figure 4).

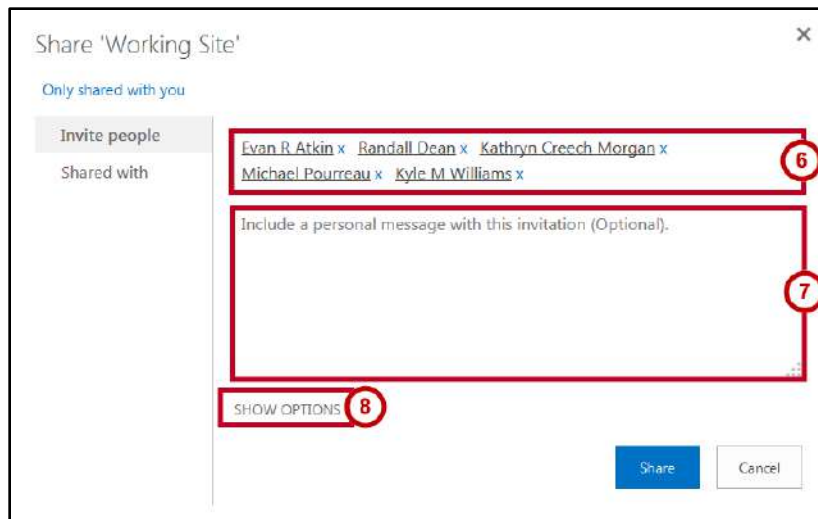


Figure 4 - Share Site Invitation

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).

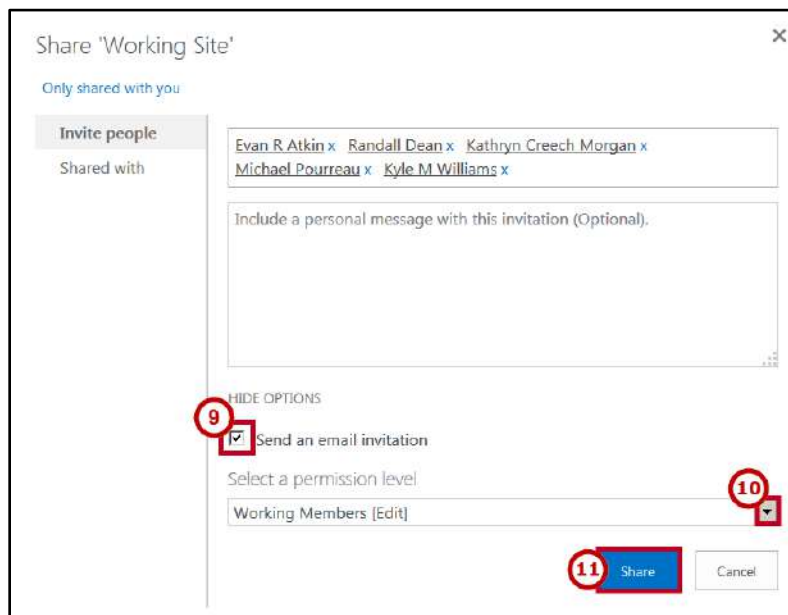


Figure 5 - Site Share Options

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.

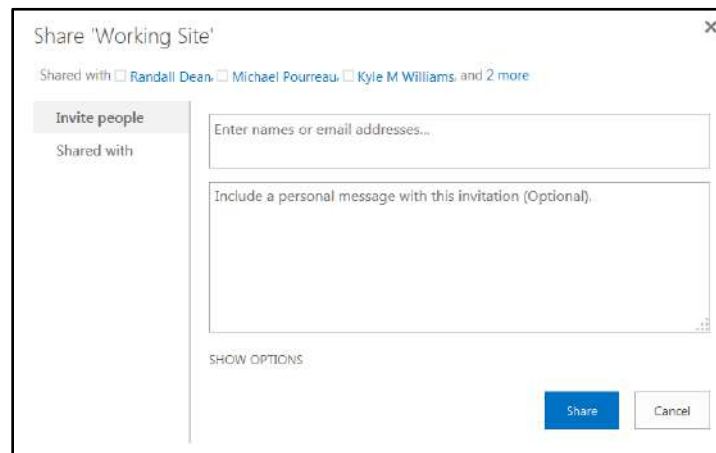


Figure 7 - Share Site Window

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.

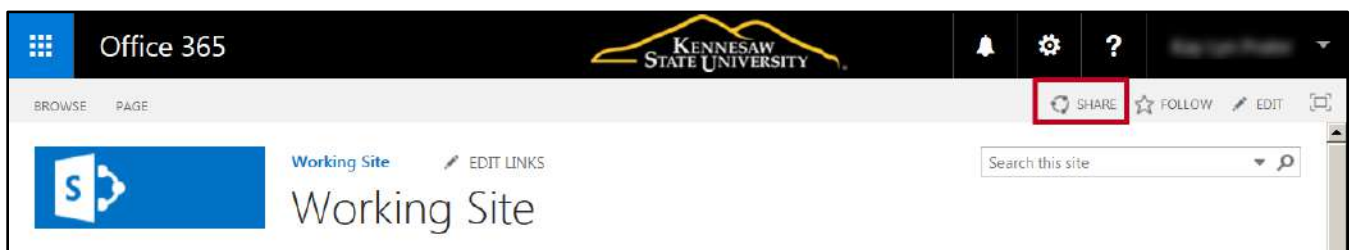


Figure 8 - Click Share

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.

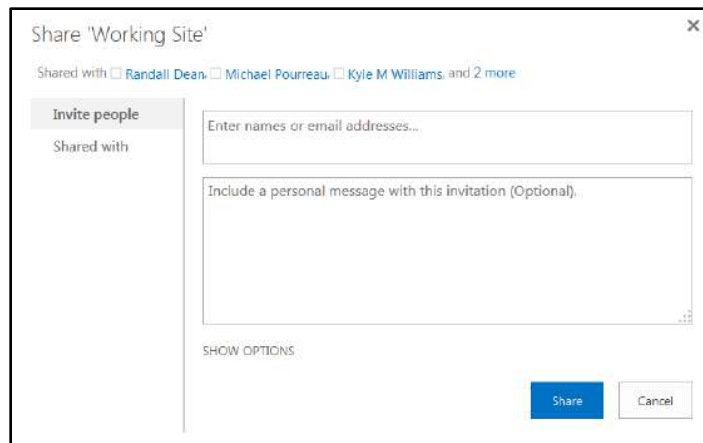


Figure 9 - Share Site Window

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).

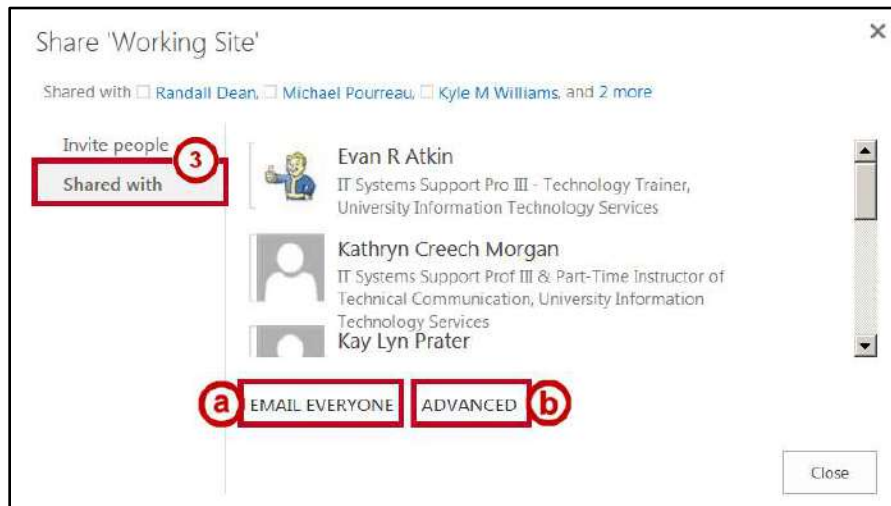


Figure 10 - Shared With

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.

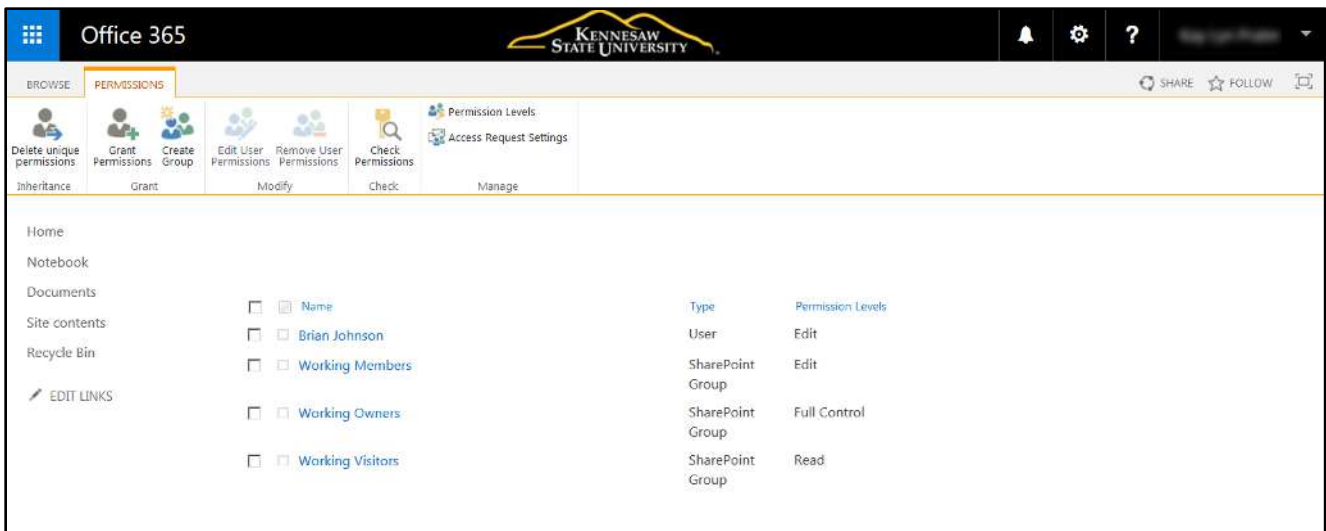


Figure 11 - Permissions Window

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).

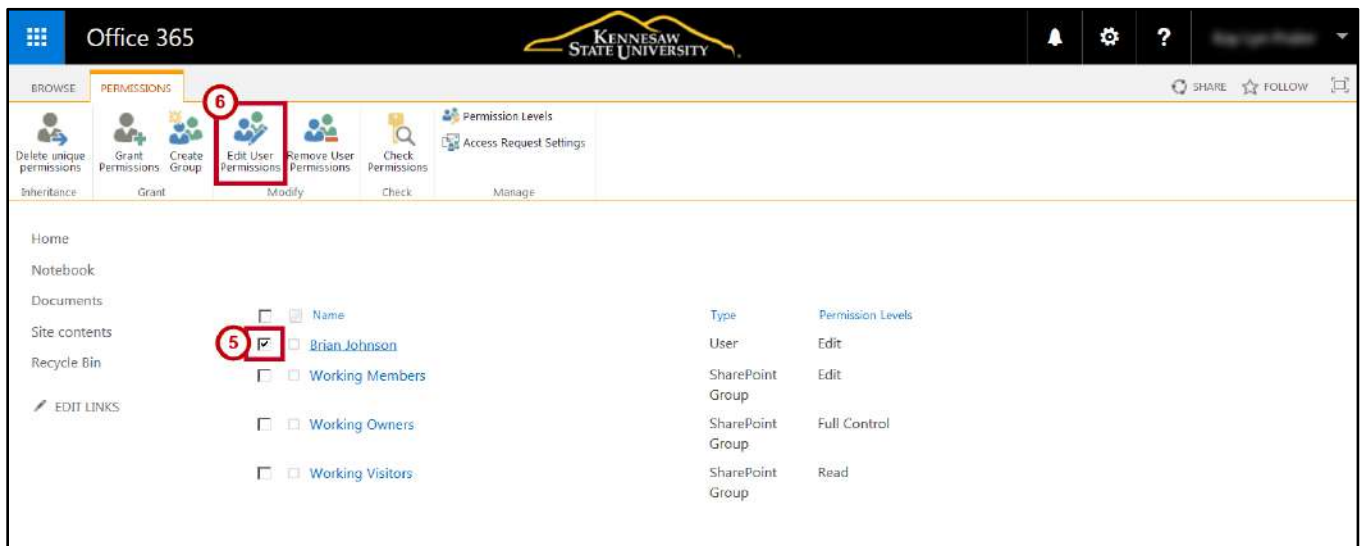


Figure 12 - Edit User Permissions

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

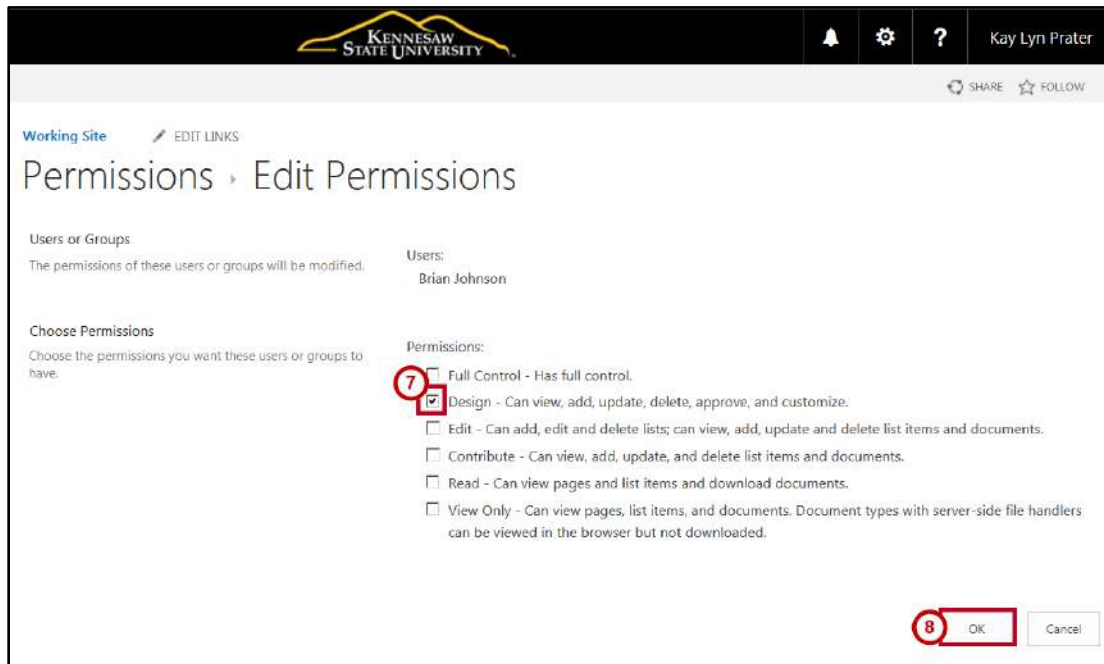


Figure 13 - Edit Permissions

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).

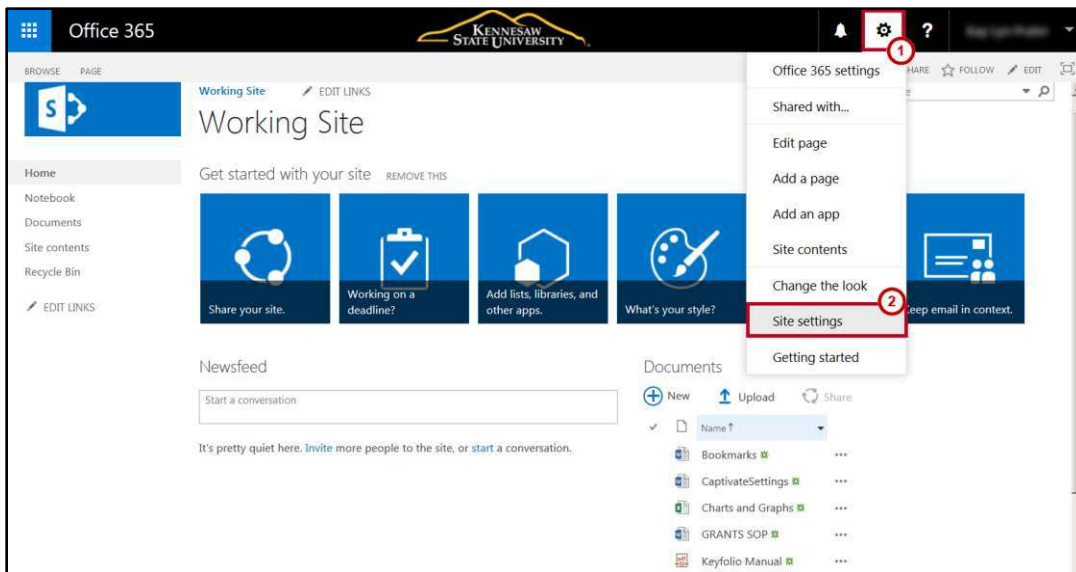


Figure 14 - Site Settings

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

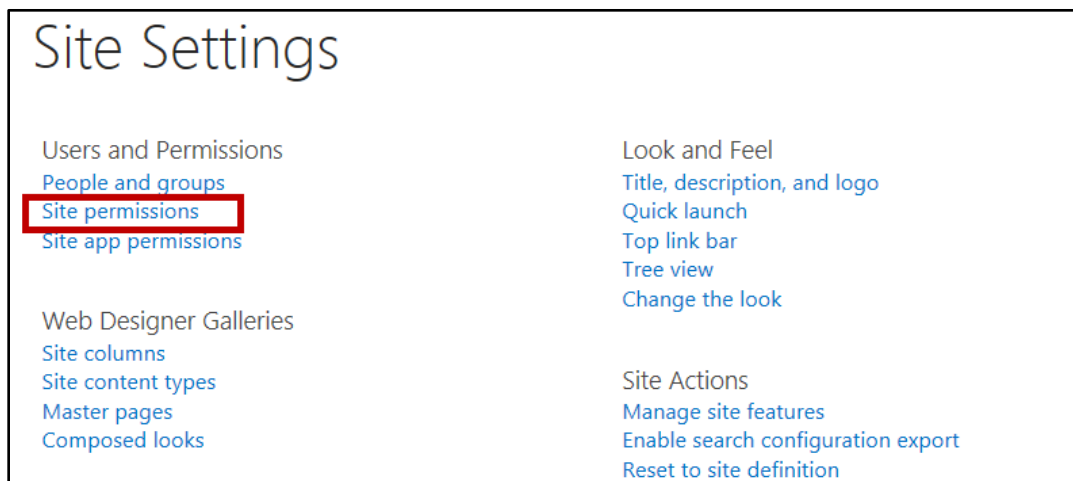


Figure 15 - Site Permissions

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*.

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BROWSE **PERMISSIONS** SHARE FOLLOW

[Delete unique permissions](#) [Grant Permissions](#) [Create Group](#) [Edit User Permissions](#) [Remove User Permissions](#) [Check Permissions](#) [Permission Levels](#) [Access Request Settings](#)

Inheritance Grant Modify Check Manage

Home
 Notebook
 Documents
 Site contents
 Recycle Bin
 EDIT LINKS

<input type="checkbox"/>	Name	Type	Permission Levels
<input type="checkbox"/>	Working Members	SharePoint Group	Edit
<input type="checkbox"/>	Working Owners	SharePoint Group	Full Control
<input type="checkbox"/>	Working 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.

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).

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).
8. 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.



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).

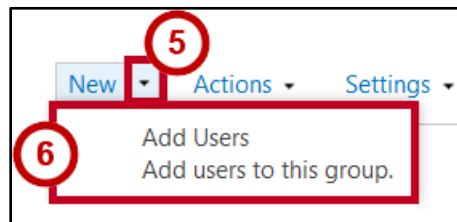


Figure 22 - Add Users

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).

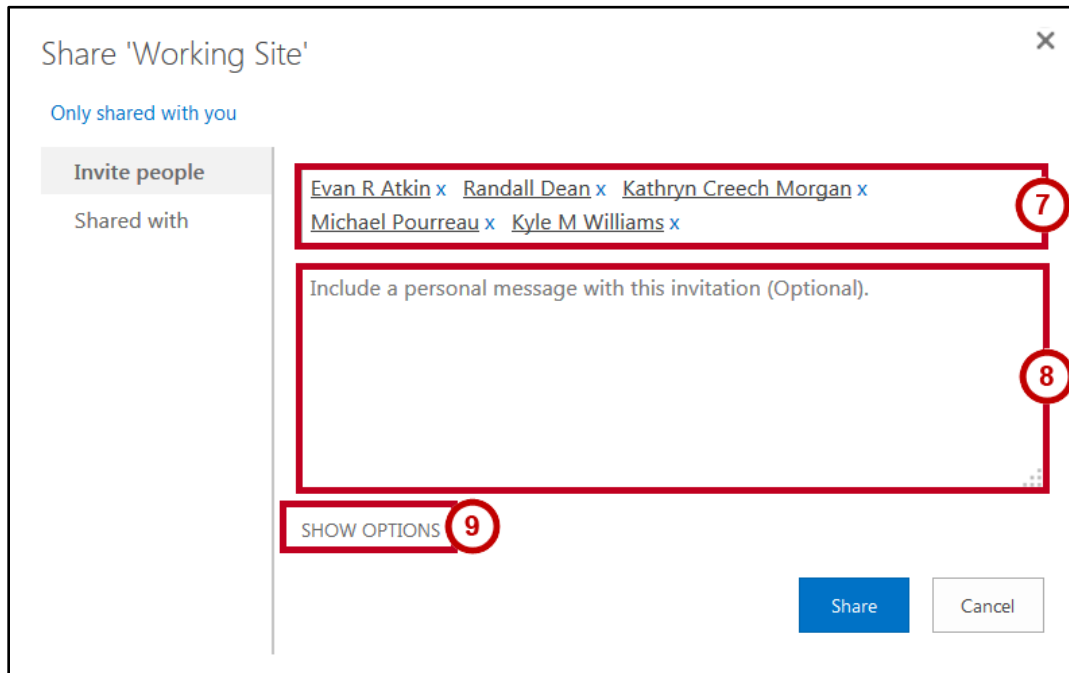


Figure 23 - Share Site Invitation

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

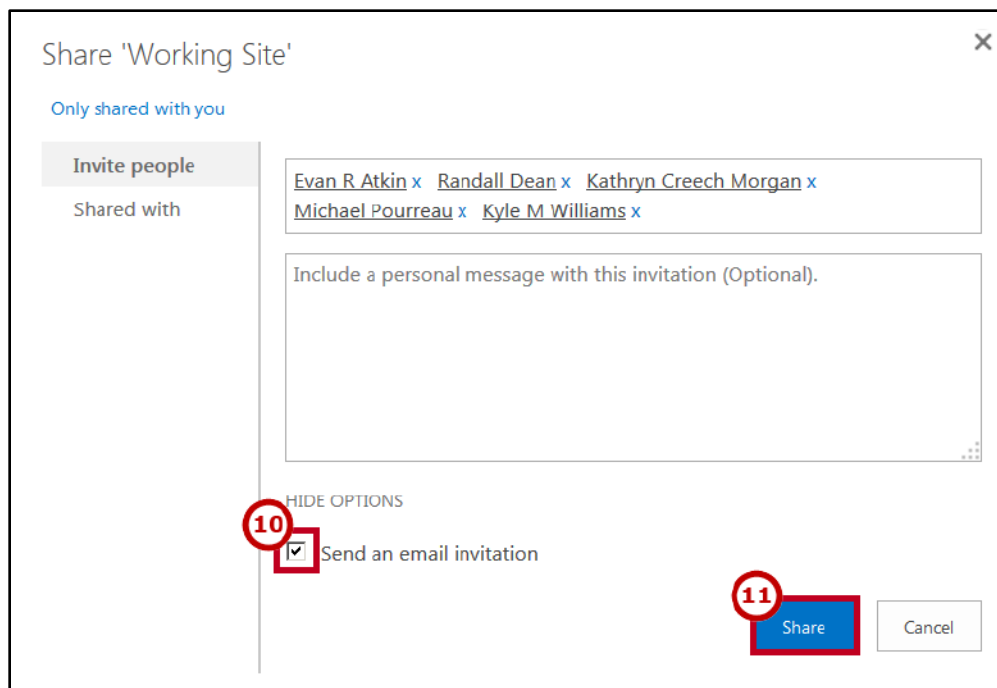


Figure 24 - Site Share Options

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).

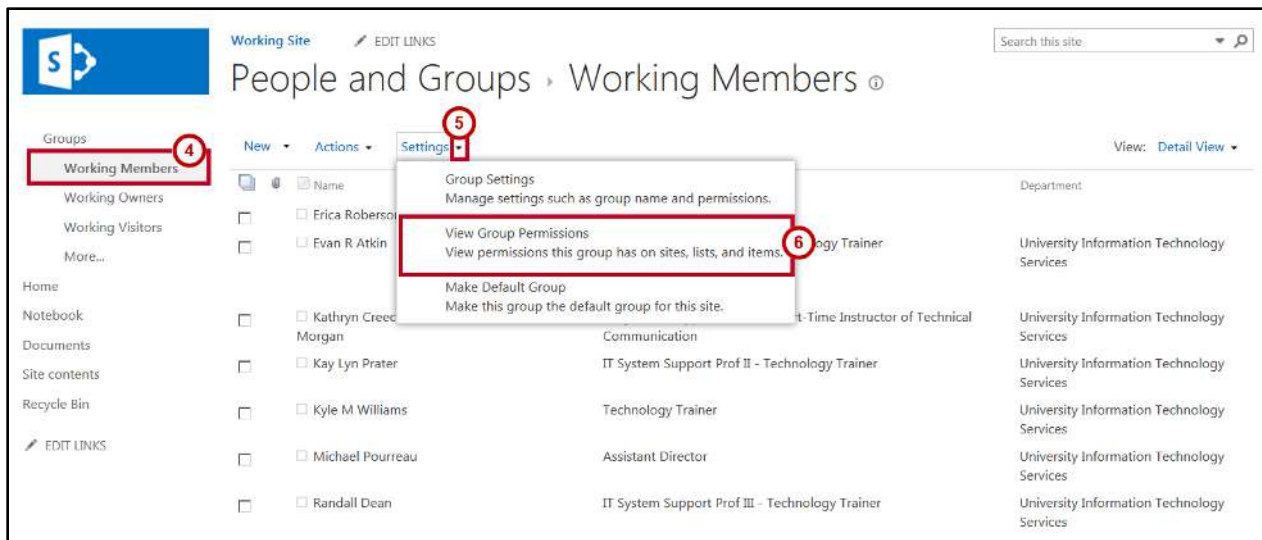


Figure 25 - View Group Permissions

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.

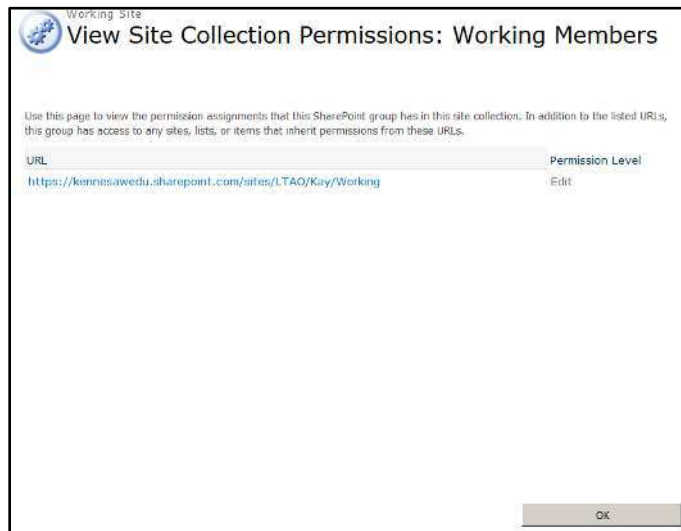


Figure 26 - Group Site Permissions

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).

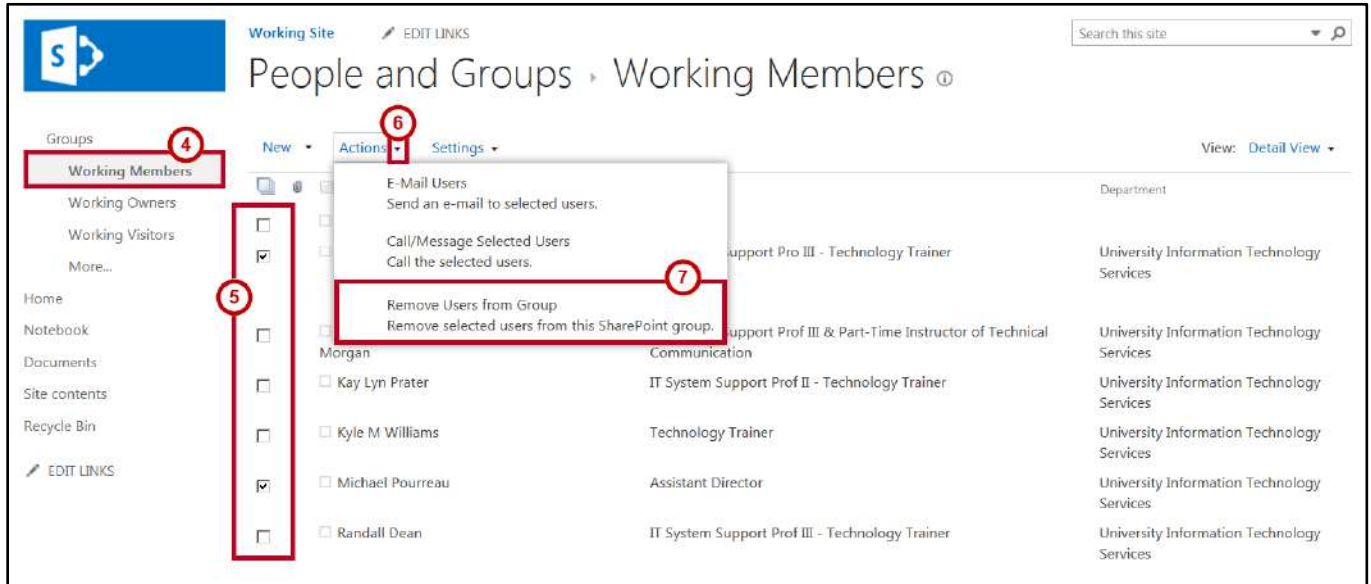


Figure 27 - Select Users to Remove

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

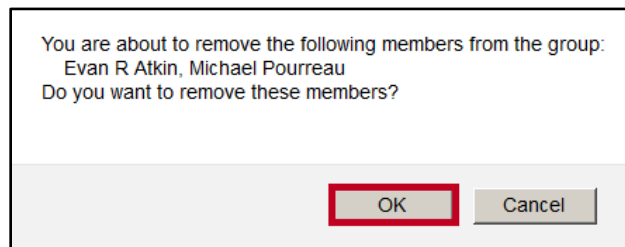


Figure 28 - Remove User

Additional Help

For additional support, please contact the KSU Service Desk:

KSU Service Desk for Faculty & Staff

- Phone: 470-578-6999
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- Phone: 470-578-3555
- Email: studenthelpdesk@kennesaw.edu
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