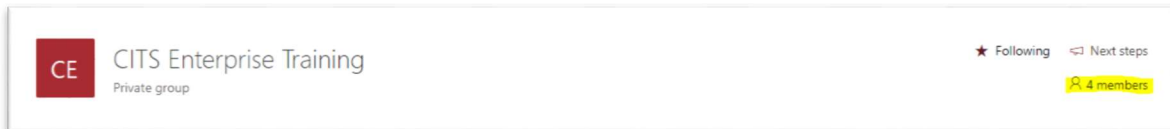


## Managing Permissions in SharePoint

Permissions in SharePoint and Teams can be confusing. There are different ways to change and update permissions that affect different areas. Depending *where* you update permissions will determine *what* permissions you're changing – to the Office 365 group or only to the SharePoint site.

### Office 365 Group Membership

When a user is added to an Office 365 Group/ Team, they are automatically given access to the Microsoft Team and the team SharePoint site. In the upper right-hand corner of the SharePoint page is an icon and then “# members”:



This link allows you to add/remove members from the Office 365 Group, which, again, grants/removes access to the Microsoft Team *and* SharePoint site. If you want to make changes to this membership, it is *strongly recommended* to do it through Microsoft Teams, not SharePoint.

It is important to remember that since Microsoft Teams is meant to be a collaborative workspace, all team members have edit permissions to team documents. If you wish to give limited access to team documents, instead of granting team membership, you can grant restricted access to documents from the Team SharePoint site.

The remainder of this document focuses on changing permissions through SharePoint that results in changes to access to *SharePoint content*– access to sites in SharePoint and specific libraries or lists.

### SharePoint Permissions

Individuals with the **Owner** role in SharePoint/Teams can manage permissions within their SharePoint site. Group and/or Individual permissions can be set per site, list, library or individual documents. Permissions are usually inherited from their parent but can be customized, if necessary.

Each SharePoint site is created with 3 default groups- Owner, Member and Visitor. It is recommended to add or remove people from a group based on what permission level you want to give the user. It is also possible to create a custom group if it's necessary to grant access to a specific group of people or a specific item that is more granular than what the default permission groups offer.

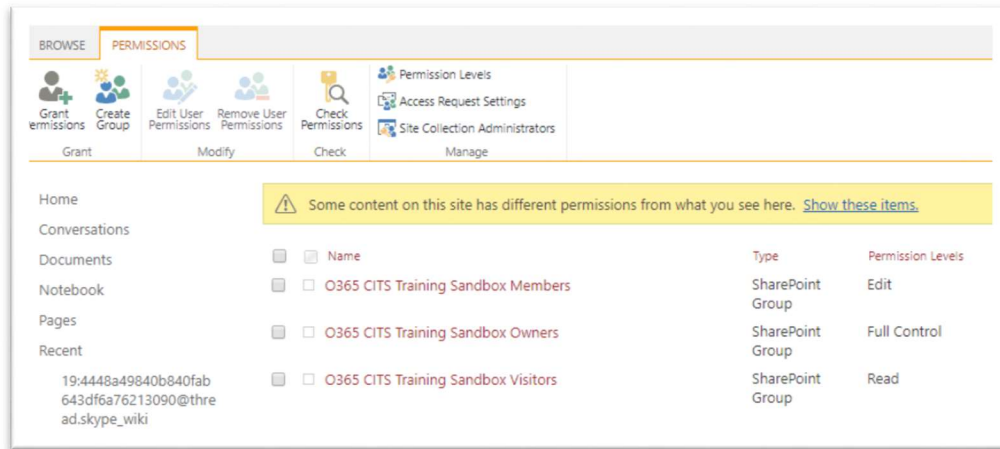
### Change SITE Permissions

To change permissions for an entire SharePoint site:

1. Click on the **Settings** (Gear icon) button at the top right.
2. Select **Site Permissions**.

**Note:** At this step, it's important to understand that if you select **Invite People>Add members to group**, you are still adding members to the Office 365 Group, which also gives access to the Team. To add people to a SharePoint site only, to add people external to UMB, or to create a new group, continue with the following instructions.

3. Select **Invite People>Share site only**
4. Or, for greater management capabilities, click **Advanced permissions settings** at the bottom of the panel. The following page will appear:



This page is where permissions to the SharePoint site can be changed. As mentioned, there are 3 site specific permission groups – Members, Owners and Visitors, and their Permission Level is displayed to the far right. Users can be added to any of these groups and they will be granted the appropriate level of access to the *SharePoint site* only. They will not gain access to the site’s associated Team.

At this point, you can either add members to an already existing group OR you can create a new group that allows you to assign a different level of access or for a specific/different group of people.

**Important:** It is recommended that permissions be assigned to groups instead of individuals because it will become harder as time goes on to manage hundreds of individual permissions. It is much easier to remove a person from one group and move them to another group if necessary.

### Add/ Remove Users from an Existing Permission Group

To add a user:

1. Click on the **group name** (I.e. O365 CITS Training Sandbox Members).
2. Once in the group, click the **New** button in the column headings.
3. Select **Add User to this Group**.
4. A dialog box will appear. Type the names of the individuals you would like to add to the permission group.
5. You can include a personalized message if you like.
6. You can also decide not to send an email to the added users by clicking on **Show Options** at the bottom. Remove the checkmark for send email invitation.
7. Click **Share**.

To remove a user:

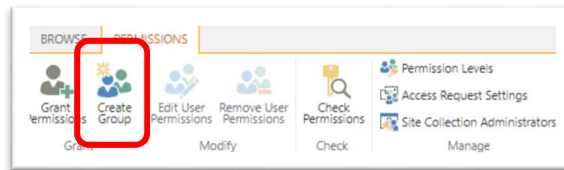
1. Click on the **group name**.
2. Once in the group, click the **checkbox** next to each individual you want to remove.
3. Once they are selected, click **Actions** at the top and select **Remove User from Group**.

### Creating a New Permission Group

Situations may arise where a specific level of access needs to be given and/or a specific group of people need access. If the existing permission groups don't meet the needs of a particular situation, it's possible to create a new permission group.

From the **Advanced permissions settings** screen (as seen on Pg. 2):

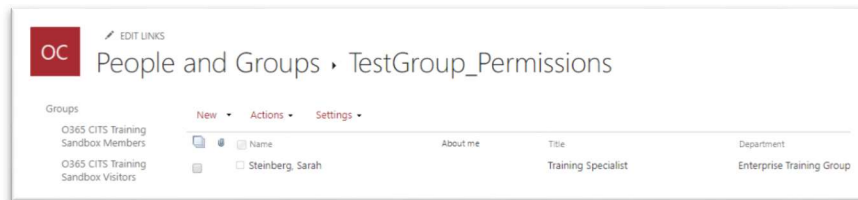
1. Click **Create Group** in the toolbar.



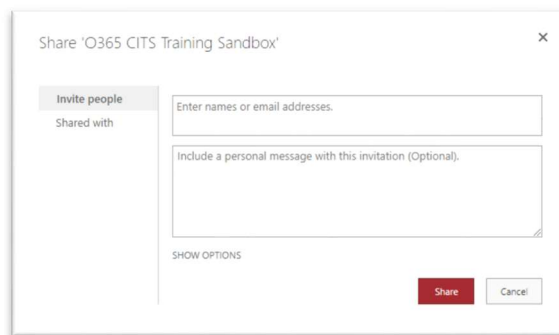
2. You will see the **People and Groups > Create Group** page. Complete the following fields/sections:
  - Name – Create a descriptive name so that the groups purpose/identity is clear
  - About Me – an optional description field
  - Group Owner – your name will default, additional owners can be added
  - Group Settings – recommended to leave the default settings
  - Membership Requests – recommended to leave the default settings
  - Give Group Permission to this Site – read the descriptions thoroughly to determine to appropriate level of permission to grant the group
3. Once all fields/sections are complete, click **Create**.

Adding Users to the New Group:

4. After clicking **Create**, the following screen will appear:



5. Click **New**
6. Click **Add Users**



7. Enter the names or email addresses of the people who should be added to this group.
  - UMB employees will appear as you begin to enter their name.
  - SOM/FPI and non-UMB employees will require entering their entire email address.

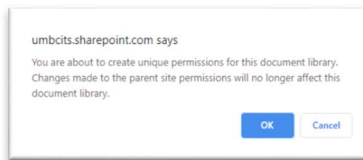
8. Include a personal message if desired.
9. Under **Show Options**, you can turn off the email invitation if desired.
10. Click **Share**.

**Change LIBRARY or LIST Permissions**

The above steps are about giving/removing access to SharePoint sites. By giving access to a site, a person has access to everything in that site, including all document libraries (files), lists, calendars, etc. It is possible to limit access to any content within the site. Below are instructions on how to limit access to a document library or list. Please note:

- It is recommended to create a new permission group (as covered on Pg. 3) that includes only the people who should have access to the library or list.
- Permissions are automatically inherited. Meaning, everyone who has access to a SharePoint site automatically has access to any document library or list within that site. To limit access to a library or list, it will be necessary to break the inheritance.

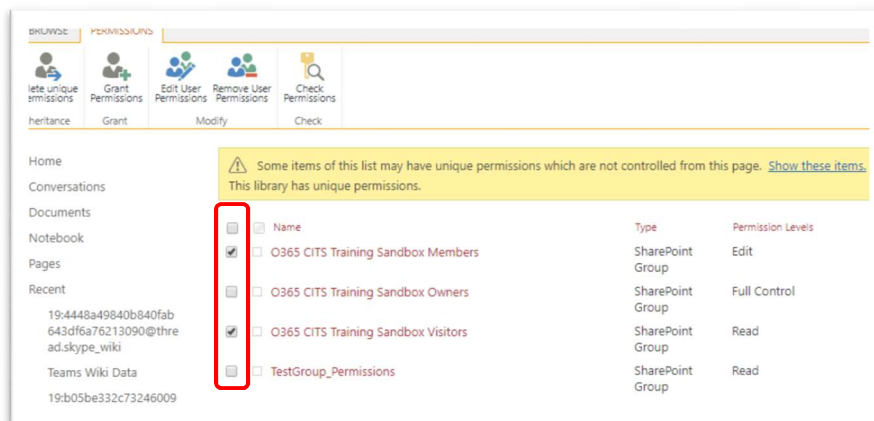
1. Navigate to the document library (**Documents** in the left-hand navigation) or the list in question.
2. Click the **Settings** (gear icon) button and then **Library Settings**. To update list permissions, select Site Contents from the site’s left navigation, select the list and right-click on the list and choose Settings.
3. Under the **Permissions and Management** column, select **Permissions for this document library or Permissions for this List**.
4. Select **Stop Inheriting Permissions** on the Permissions ribbon bar. The following message will appear:



5. Click **OK**.

Once inheritance is broken, you can remove or edit each groups’ permissions for this library or list. You can also grant permissions to individual users as well as other groups if necessary.

6. Click the checkboxes to the left of the groups who you want to *remove* access from.



- a. **IMPORTANT** – do not remove access for the main site Owners group. This will take away your ability to access or manage permissions for this library or list.

7. In this example, we are leaving access for the Owner group and will update access to the newly created permission group 'TestGroup\_Permissions' (which was done following the instructions on Pg. 3).
8. Click **Remove User Permissions** in the toolbar.

### Changing a Groups Permission Level

Building on the example on Pg. 4, at this point, only the following groups have access to the document library or list:

<input type="checkbox"/> <input type="checkbox"/> Name	Type	Permission Levels
<input type="checkbox"/> O365 CITS Training Sandbox Owners	SharePoint Group	Full Control
<input type="checkbox"/> TestGroup_Permissions	SharePoint Group	Read

When created, the TestGroup was only given Read access to the entire SharePoint site. However, it's necessary to give them more access to the document library or list.

1. Check the box to the left of the permission group where the access level needs to be changed.
2. Click **Edit User Permissions** in the toolbar.
3. Review the listed permissions and determine which level should be granted. In most situations, **Edit** or **Contribute** will be selected.
4. Once the appropriate permission level is selected, click **OK**. The TestGroup\_Permissions group now has Contribute access.

<input type="checkbox"/> <input checked="" type="checkbox"/> Name	Type	Permission Levels
<input type="checkbox"/> O365 CITS Training Sandbox Owners	SharePoint Group	Full Control
<input checked="" type="checkbox"/> TestGroup_Permissions	SharePoint Group	Contribute

At any point, if you realize that access shouldn't be updated/changed and you want the original (parent) access to be reinstated, click **Delete Unique Permissions** in the toolbar and the original set of permissions will be reinstated.