

SharePoint Permission Management

SharePoint Permissions:

It is very important to manage access properly in SharePoint. Users who require information to do their jobs should be able to locate and then access information easily. In cases where you have sensitive information, it's crucial that only users who have a business requirement to access it have the rights to do so.

Permission Levels:

A permission level represents a set of rights that can be assigned to a user or group on a specific SharePoint object such as site, list, or document. Out-of-the-box, several permission levels exist to reflect the most common usage scenarios of the system.

Full Control: Has full control

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

Limited: Access Can view specific lists, document libraries, list items, folders, or documents when given permissions

View Only: Can view pages, list items, and documents.

The following additional permission levels are provided with the publishing template by default:

Approve: Includes permissions to edit and approve pages, list items, and documents.

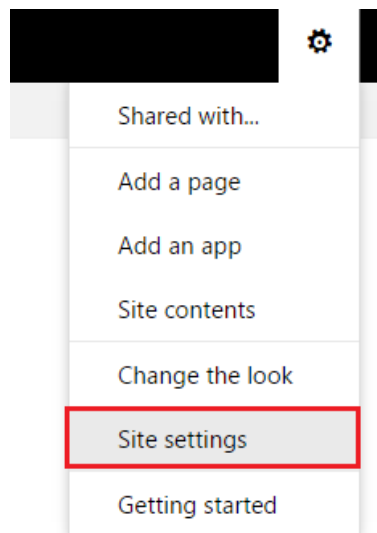
Manage Hierarchy: Includes permissions to sites and edit pages, list items, and documents.

Restricted Read: Includes permissions to view pages and documents, but not historical versions or permissions information.

Create a Custom Permission Levels:

We can create custom permission levels by following below steps:

Open the site using browser and then click on the gear icon (settings) and then click Site settings.

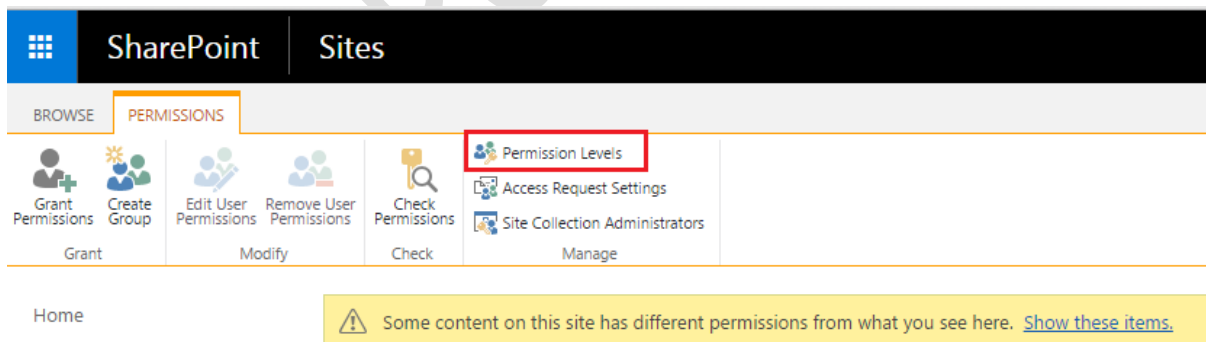


Then in the Site Setting page, click on Site permissions link which is under Users and Permissions in the Site Settings page.

Site Settings

Users and Permissions
[People and groups](#)
[Site permissions](#) (highlighted with a red rectangle)
[Site collection administrators](#)
[Site app permissions](#)

This will open the Permissions page, click on the Permission Levels from the Ribbon as shown in the fig below:



Then in the Permissions Levels page click on “Add a Permission Levels” link as shown in the fig below:

Permissions ▸ Permission Levels ⓘ

 Add a Permission Level  Delete Selected Permission Levels

Permission Level

- ☐ Full Control
- ☐ Design
- ☐ Edit
- ☐ Contribute
- ☐ Read
- ☐ Limited Access
- ☐ View Only

Then in the Add a Permission level page, give a name, description and select the permissions which you want to give like below:

Permission Levels ▸ Add a Permission Level

Name and Description

Type a name and description for your permission level. The name is shown on the permissions page. The name and description are shown on the add users page.

Name:

MyCustomPermissionLevel

Description:

This is my custom permission level.

Permissions

Choose which permissions to include in this permission level. Use the **Select All** check box to select or clear all permissions.

Select the permissions to include in this permission level.

☐ Select All

List Permissions

- ☒ Manage Lists - Create and delete lists, add or remove columns in a list, and add or remove public views of a list.
- ☒ Override List Behaviors - Discard or check in a document which is checked out to another user, and change or override s
- ☒ Add Items - Add items to lists and add documents to document libraries.
- ☒ Edit Items - Edit items in lists, edit documents in document libraries, and customize Web Part Pages in document library
- ☐ Delete Items - Delete items from a list and documents from a document library.
- ☒ View Items - View items in lists and documents in document libraries.
- ☒ Approve Items - Approve a minor version of a list item or document.
- ☒ Open Items - View the source of documents with server-side file handlers.
- ☒ View Versions - View past versions of a list item or document.
- ☒ Delete Versions - Delete past versions of a list item or document.
- ☒ Create Alerts - Create alerts.
- ☒ View Application Pages - View forms, views, and application pages. Enumerate lists.

Site Permissions

- ☒ Manage Permissions - Create and change permission levels on the Web site and assign permissions to users and groups

Then click on Create button to create the permission level. Once it is successfully created it will return back to the Permissions levels page and you can see our custom permission level.

TSInfo Technologies (OPC) Pvt Ltd

Flat G-04, SJR Residency, Devarabeesanahalli, Bellandur, Bangalore, 560103

Email: info@tsinfotechnologies.com, Phone: +91-9916854253

Permissions » Permission Levels ⓘ

Add a Permission Level ✕ Delete Selected Permission Levels	
Permission Level	Description
<input type="checkbox"/> Full Control	Has full control.
<input type="checkbox"/> Design	Can view, add, update, delete, approve, and customize.
<input type="checkbox"/> Edit	Can add, edit and delete lists; can view, add, update and delete list items and documents.
<input type="checkbox"/> Contribute	Can view, add, update, and delete list items and documents.
<input type="checkbox"/> Read	Can view pages and list items and download documents.
<input type="checkbox"/> Limited Access	Can view specific lists, document libraries, list items, folders, or documents when given permissions.
<input type="checkbox"/> 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.
<input checked="" type="checkbox"/> MyCustomPermissionLevel	This is my custom permission level.

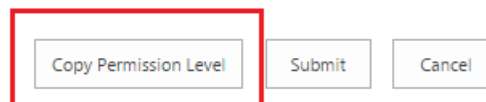
Create Permission group using existing permission group:

We can also create a custom permission level based on an existing permission level. To do so, navigate to the Permission level page as discussed. And then click on any permission level.

Permissions » Permission Levels ⓘ

Add a Permission Level ✕ Delete Selected Permission Levels	
Permission Level	Description
<input type="checkbox"/> Full Control	Has full control.
<input type="checkbox"/> Design	Can view, add, update, delete, approve, and customize.
<input type="checkbox"/> Edit	Can add, edit and delete lists; can view, add, update and delete list items and documents.
<input checked="" type="checkbox"/> Contribute	Can view, add, update, and delete list items and documents.
<input type="checkbox"/> Read	Can view pages and list items and download documents.
<input type="checkbox"/> Limited Access	Can view specific lists, document libraries, list items, folders, or documents when given permissions.
<input type="checkbox"/> 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.

This will open the Edit permission level page, go down and click on “Copy Permission Level” button as shown in the fig below:



This will copy the permission level and will create a new permission level which will have the existing permissions checked. Based on your requirement you can check or uncheck the permission levels and then click on create. Here I have just uncheck the “Delete Items - Delete items from a list and documents from a document library.” Permission so that people or group who will be having this permission level, they will not be able to delete any item. But they can add or edit items. The screen looks like below:

Permission Levels › Copy Permission Level

Name and Description

Type a name and description for your permission level. The name is shown on the permissions page. The name and description are shown on the add users page.

Name:

ContributNoDelete

Description:

This is our contribute no delete custom permission level.

Permissions

Choose which permissions to include in the new permission level. You can keep the permissions from the original permission level or make changes. Use the **Select All** checkbox to assign all user permissions to the permission level.

Select the permissions to include in this permission level.

☐ Select All

List Permissions

- ☐ Manage Lists - Create and delete lists, add or remove columns in a list, and add or remove public views of a list.
- ☐ Override List Behaviors - Discard or check in a document which is checked out to another user, and change or override settings w
- ☒ Add Items - Add items to lists and add documents to document libraries.
- ☒ Edit Items - Edit items in lists, edit documents in document libraries, and customize Web Part Pages in document libraries.
- ☐ Delete Items - Delete items from a list and documents from a document library.
- ☒ View Items - View items in lists and documents in document libraries.
- ☐ Approve Items - Approve a minor version of a list item or document.
- ☒ Open Items - View the source of documents with server-side file handlers.
- ☒ View Versions - View past versions of a list item or document.
- ☒ Delete Versions - Delete past versions of a list item or document.
- ☒ Create Alerts - Create alerts.
- ☒ View Application Pages - View forms, views, and application pages. Enumerate lists.

Site Permissions

- ☐ Manage Permissions - Create and change permission levels on the Web site and assign permissions to users and groups.
- ☐ View Web Analytics Data - View reports on Web site usage.

If you will visit the Permission Levels page you can see the permission level got created.

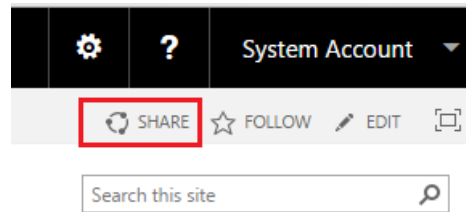
Permissions › Permission Levels ⓘ

[Add a Permission Level](#) | [Delete Selected Permission Levels](#)

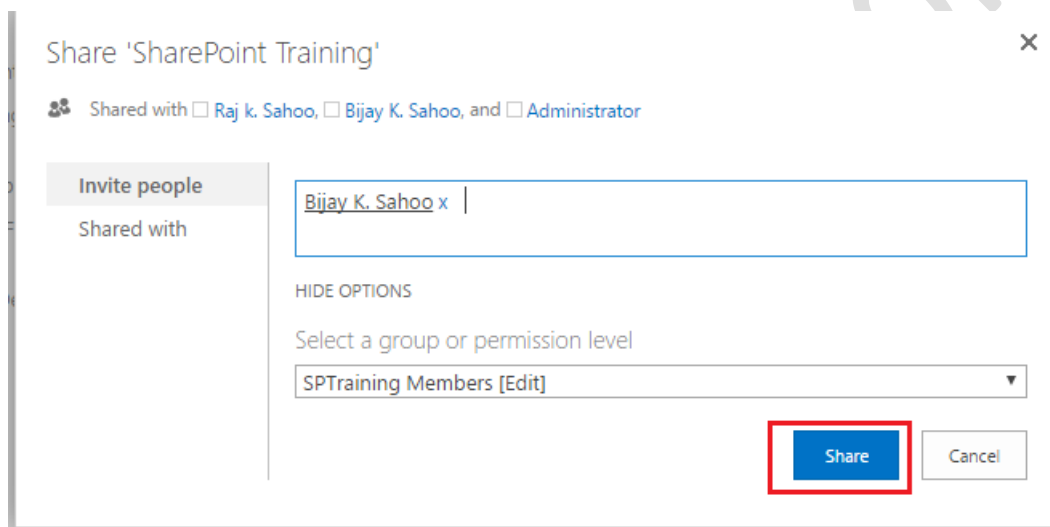
Permission Level	Description
<input type="checkbox"/> Full Control	Has full control.
<input type="checkbox"/> Design	Can view, add, update, delete, approve, and customize.
<input type="checkbox"/> Edit	Can add, edit and delete lists; can view, add, update and delete list items and documents.
<input type="checkbox"/> Contribute	Can view, add, update, and delete list items and documents.
<input type="checkbox"/> Read	Can view pages and list items and download documents.
<input type="checkbox"/> Limited Access	Can view specific lists, document libraries, list items, folders, or documents when given permissions.
<input type="checkbox"/> 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.
<input type="checkbox"/> ContributNoDelete	This is our contribute no delete custom permission level.

Give Site Permission to User:

To access a SharePoint site a user should have access to the SharePoint site. To give user access to a SharePoint 2016 site, Open your Site and click on Share button as shown in the fig below:



Then you can enter name or email address. And then click on "Show Option" which will expand to Show the groups presented in the system. Select the group into which you want to add like below. Then click on Share button.

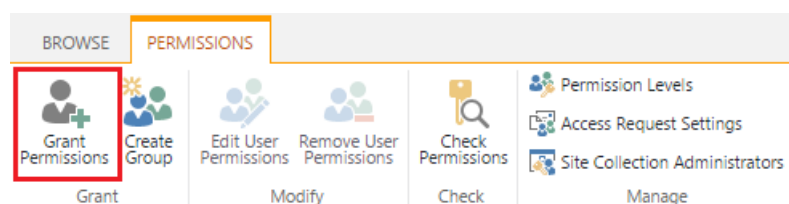


Apart from this you can also give access to the user from the site permission page. Open SharePoint 2016 site and then click on the gear icon and then site settings. Then in the Site Settings page, click on Site permissions link like below:

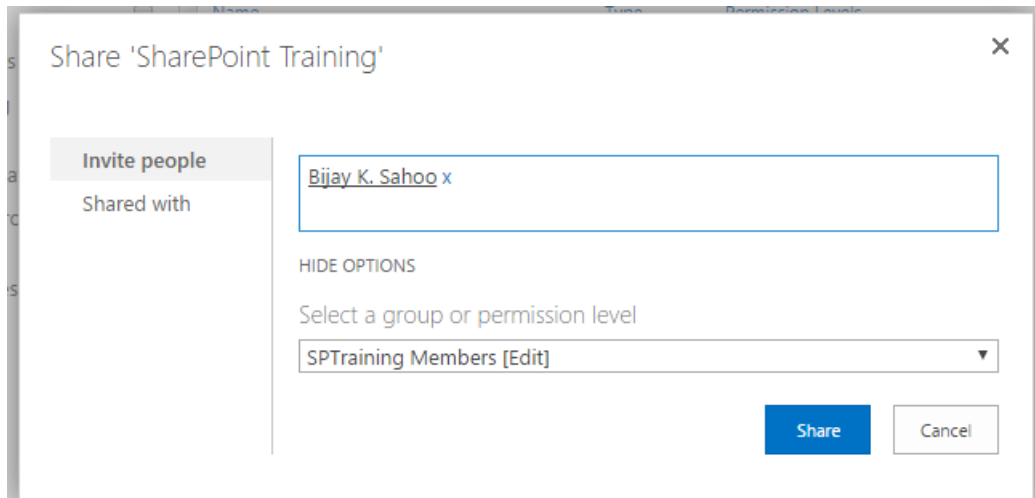
Site Settings

Users and Permissions
[People and groups](#)
[Site permissions](#)
[Site collection administrators](#)
[Site app permissions](#)

Then in the Site Permissions page, click on Grant Permissions button as shown in the fig below:



This will open the Share dialog box. Here also put the username or email address. And expand the option to choose the group like below.



SharePoint Groups:

SharePoint Groups are security groups which can have collection of users and you can assign a permission to them. By default SharePoint create some groups when you create a site.

Site Visitors

Site Members

Site Owners

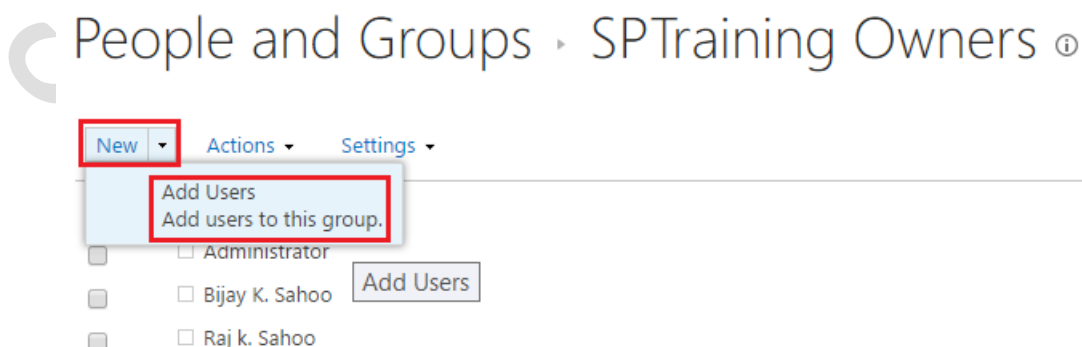
But based on the site template it may create additional groups also.

Add user to existing group:

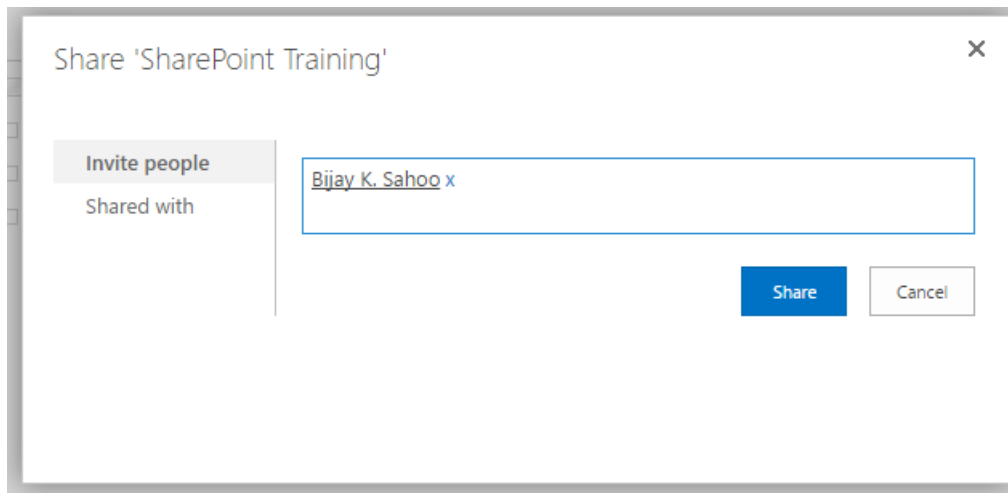
We can create a user to an existing group. To add a user to the group follow below steps:

Click on the Settings icon and then go to site settings page.

Then in the site settings page, click on Site permissions link which is under User and Permissions. This will open the group names, click on the group into which you want to add the user. This will open group details. There click on New -> Add Users like below:

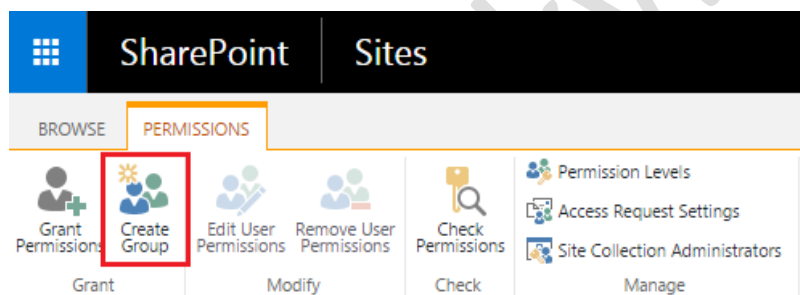


Then put the user name in the share dialog box like below:



Create SharePoint Group:

To create a SharePoint group, go to the Site Permissions page as we have gone before. Then click on Create Groups icon as shown in the fig below:



In the create group page, give a name for the group, description for the group. Then it will take the logged in user as the group owner.

Then choose who can view the membership of the group as well as who can edit the membership of the group.

You can leave as it is in the Membership Requests section.

Then choose what permission you want to assign in the Give Group Permission to this Site section.

People and Groups • Create Group ⓘ

Name and About Me Description
Type a name and description for the group.

Name:

About Me:
[Click for help about adding HTML formatting.](#)

Owner
The owner can change anything about the group such as adding and removing members or deleting the group. Only one user or group can be the owner.

Group owner:

Group Settings
Specify who has permission to see the list of group members and who has permission to add and remove members from the group.

Who can view the membership of the group?
☒ Group Members ☐ Everyone

Who can edit the membership of the group?
☒ Group Owner ☐ Group Members

Membership Requests
Specify whether to allow users to request membership in this group and allow users to request to leave the group. All requests will be sent to the e-mail address specified. If auto-accept is enabled, users will automatically be added or removed when they make a request.

Caution: If you select yes for the Auto-accept requests option, any user requesting access to this group will automatically be added as a member of the group and receive the permission levels associated with the group.

Allow requests to join/leave this group?
☐ Yes ☒ No

Auto-accept requests?
☐ Yes ☒ No

Send membership requests to the following e-mail address:

[Give Group Permission to this Site](#)

Specify the permission level that you want members of this SharePoint group to have on this site. If you do not want to give group members access to this site, ensure that all checkboxes are unselected.

[View site permission assignments](#)

Choose the permission level group members get on this site: <http://mypc29024/sites/SPTraining>

- ☐ Full Control - Has full control.
- ☐ 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.

Then click on create which will create the SharePoint group.

People and Groups • **MyTestSPGroup**

New ▾ Actions ▾ Settings ▾

  Name

About me

There are no items to show in this view of the "User Information List" list.

SharePoint Groups and AD groups:

Check the below article for more:

SharePoint Groups or AD Groups which should we prefer?

<https://www.enjoysharepoint.com/sharepoint-groups-or-ad-groups-which-should-we-prefer/>

Permissions for List or Document Library:

We can check permission for document library by following below steps:

Open SharePoint list or document library using browser then click on Library Settings or List Settings page button from the ribbon to open the list settings or library settings page.

Then in the Settings page, click on “Permissions for this document library” link which is under “Permissions and Management” section.

TSInfo Technologies (OPC) Pvt Ltd

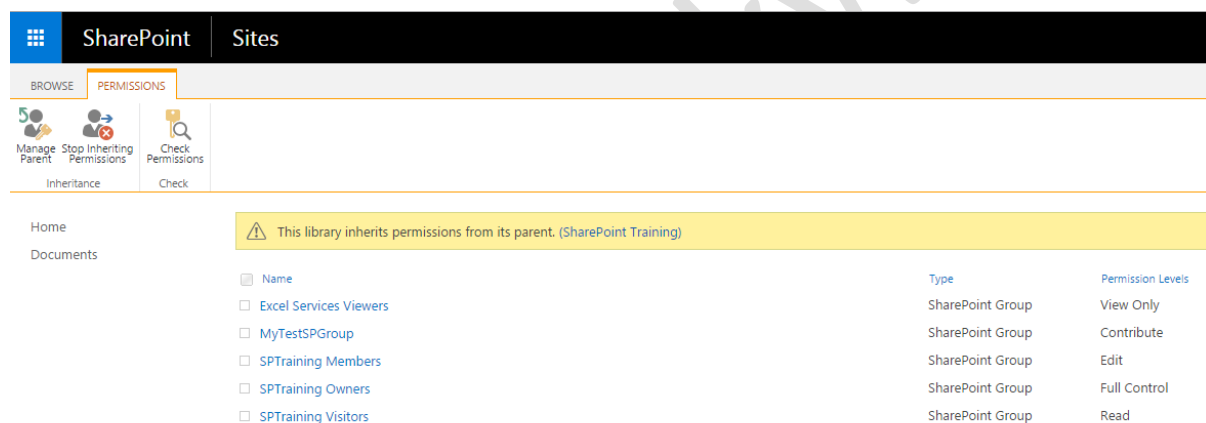
Flat G-04, SJR Residency, Devarabeesanahalli, Bellandur, Bangalore, 560103

Email: info@tsinfotechnologies.com, Phone: +91-9916854253

Permissions and Management

- Delete this document library
- Save document library as template
- **Permissions for this document library**
- Manage files which have no checked in version
- Workflow Settings
- Enterprise Metadata and Keywords Settings
- Generate file plan report
- Information management policy settings
- Record declaration settings

This will open the list or document permissions page like below:



Name	Type	Permission Levels
Excel Services Viewers	SharePoint Group	View Only
MyTestSPGroup	SharePoint Group	Contribute
SPTTraining Members	SharePoint Group	Edit
SPTTraining Owners	SharePoint Group	Full Control
SPTTraining Visitors	SharePoint Group	Read

If you want to stop inherit the permission and want to give unique permission then click on the Stop inheriting permissions button.

This it will ask a confirmation message and then click on OK.

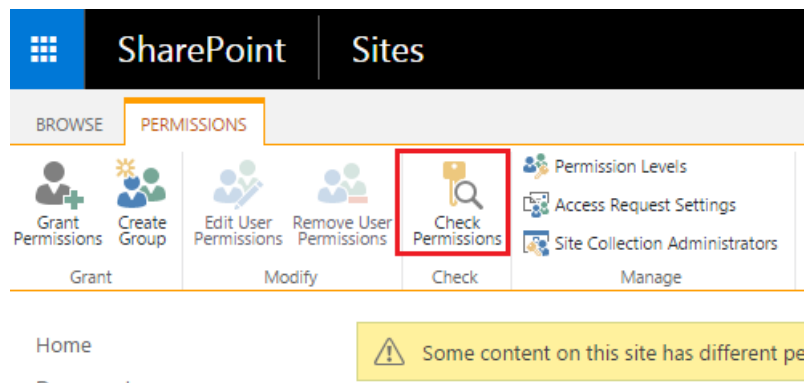
Then click on the Grant Permission button to give permission.

Item Level Permissions in SharePoint:

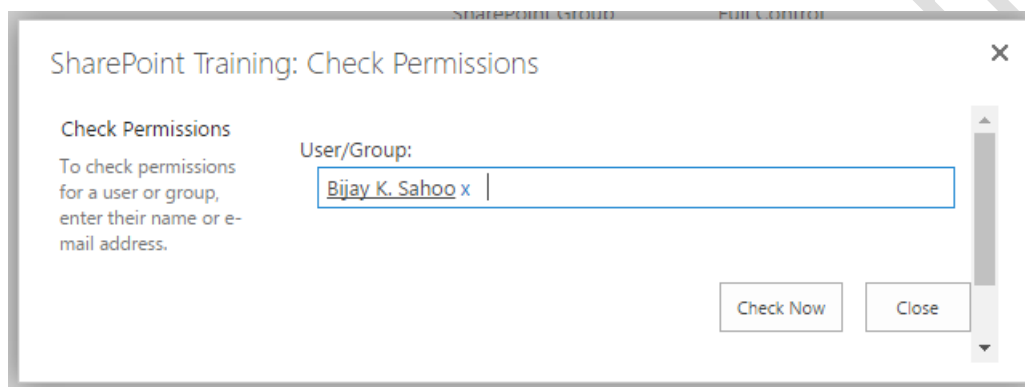
SharePoint 2013 item level permission: <https://www.enjoysharepoint.com/sharepoint-2013-item-level-permission/>

Check user permission of a particular user:

We can easily check permission of a user what access s/he has. For this go to the site permissions page and then click on check permissions as shown in the fig below:



Then in the Check Permissions dialog box, put the User name or email address whose permissions you want to check and then click on the Check now button like below:



It will display the permission details for the user.

External Sharing:

<https://www.enjoysharepoint.com/sharepoint-office-365-sharing-with-external-users/>