

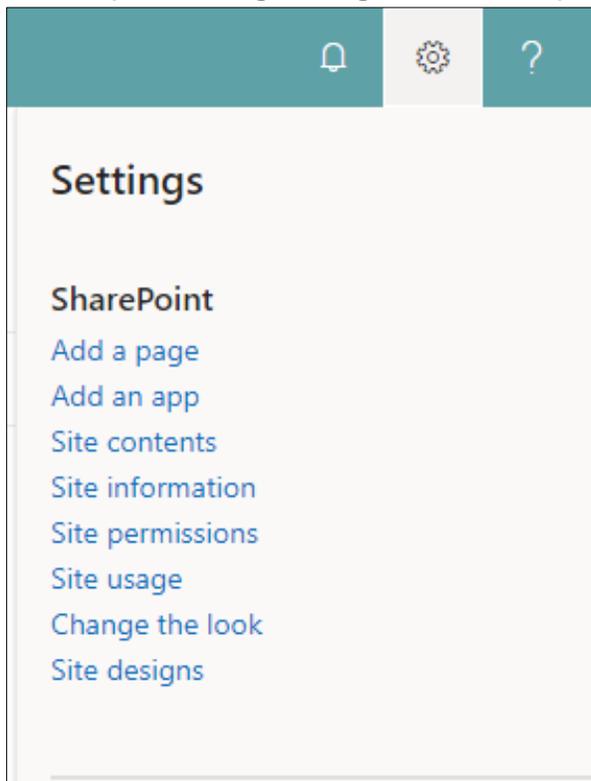
Microsoft 365: Setting Permissions in SharePoint

Note: Permissions are automatically inherited. This means that everybody who has access to a SharePoint site automatically has the same access to any document library within that site. As well as changing settings for the whole site, you can set separate permissions for individual documents and lists.



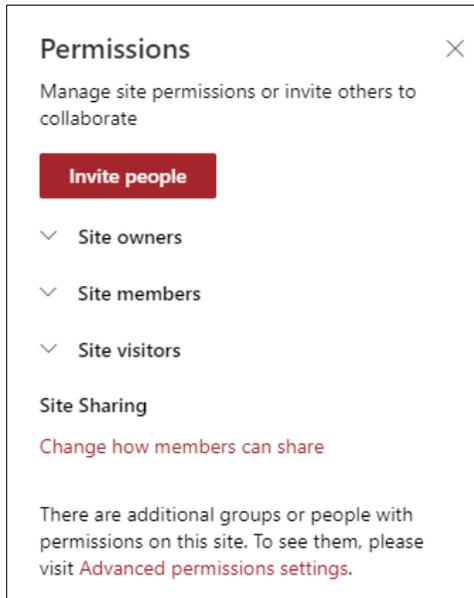
SharePoint: Setting Permissions for Whole Site

1. Sign in to your Office365 account and open SharePoint.
2. Open the SharePoint site you want to work with. You must be an Owner to make these changes.
3. Open Settings: the gear on the top right.



Note: the settings options are different depending on where you are in SharePoint.

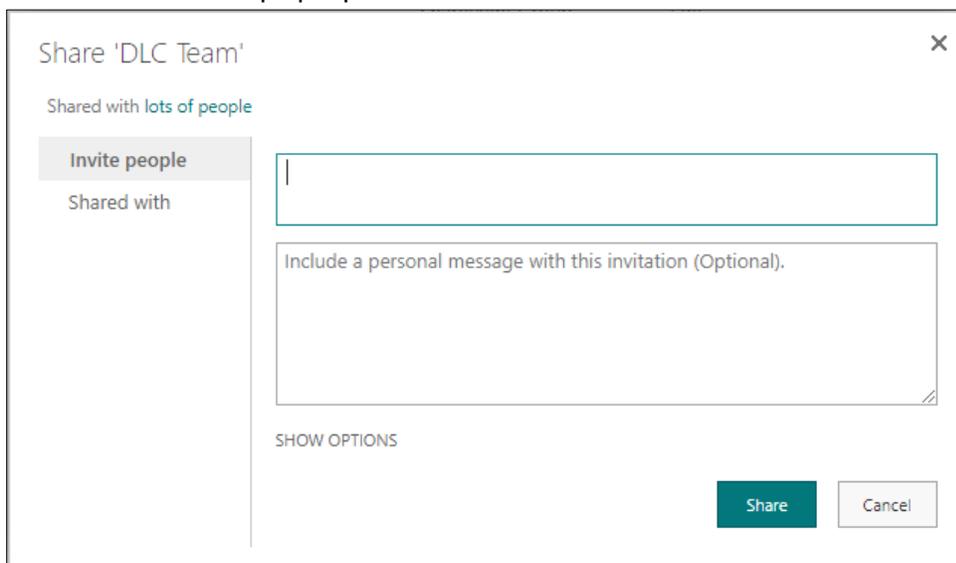
4. Click **Site permissions**.



5. Click **Advanced permissions settings**.

6. The default groups are Members, Owners, and Visitors. Their default settings are: Members—Edit, Owners—Full Control, and Visitors—Read. These can be changed **except for Owners** (you could lock yourself out of editing the SharePoint site!). To create more groups, you can use existing Groups from Outlook or create them in SharePoint. Note: Managing permissions individually is not recommended, since groups will save you time when changes need to be made.

7. To grant permissions to existing Groups: click **Grant Permissions**. The following window will pop up:



8. Click **SHOW OPTIONS**.

9. Select a permission level from the dropdown menu, depending on what you want that Group of people to be able to do. The permissions are ordered from most control to least.
10. Type the name of the Group into the top text bar and select the right one when it pops up. Enter a message if you like.
11. Click **Share**.
12. To create a group in SharePoint: click **Create Group**.
13. Fill in the name you want for this group and select the permission level (checkboxes at the bottom, screenshot below).

Choose the permission level group members get on this site: <https://schdist57.sharepoint.com/sites/DLCTeam>

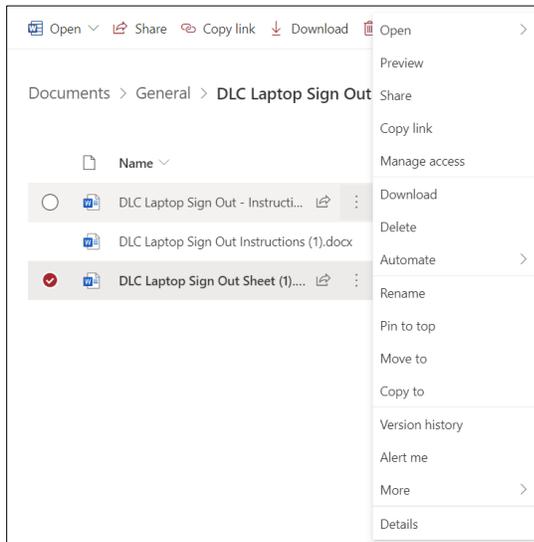
- Full Control - Has full control.
- Design - Can view, add, update, delete, approve, and customize.
- Edit - Can add, edit and delete lists; can view, add, update and delete list items and documents.
- Contribute - Can view, add, update, and delete list items and documents.
- Read - Can view pages and list items and download documents.
- Restricted View - Can view pages, list items, and documents. Documents can be viewed in the browser but not downloaded.

14. Click **Create**.
15. Click **New** to invite people or Groups into this SharePoint group.
16. Type each name into the text bar and select the correct ones as they pop up.
17. Click **Share**.

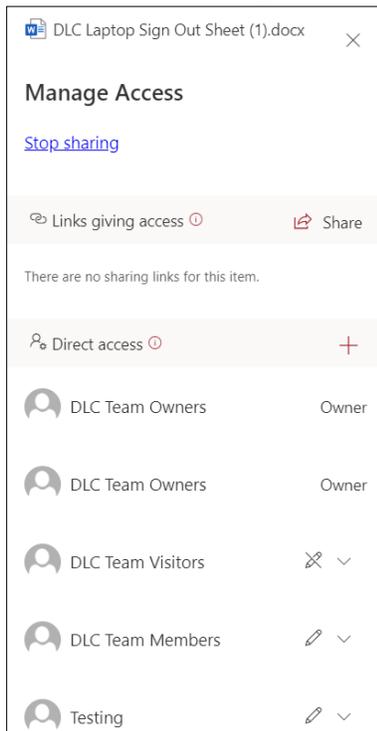


SharePoint: Setting Permissions for Individual Documents

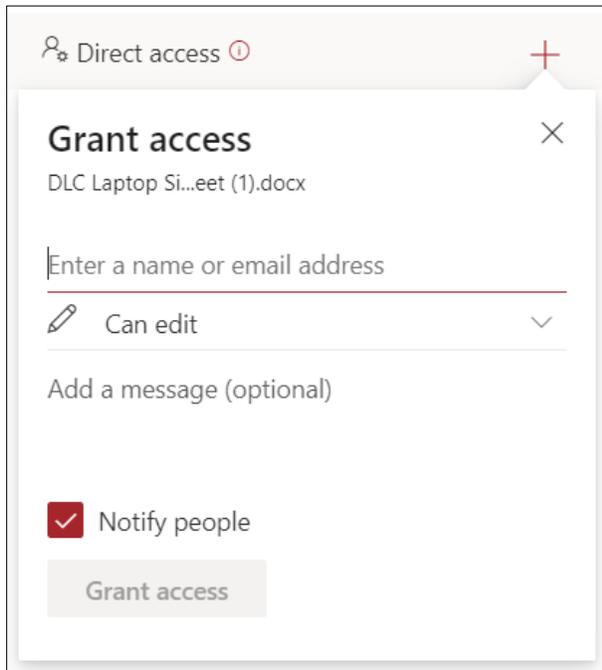
1. Sign in to your Office365 account and open SharePoint.
2. Open the SharePoint site you want to work with. You must be an Owner to make these changes.
3. Click **Documents** on the left sidebar.
4. Hover over the document you want to work with.
5. Click the three dots beside the document's title for more options.



6. Click **Manage access**.



7. **Stop sharing** means all links for this document will be deleted and only owners will be able to access it at all. **Share** means you can send a link to the document to a contact or Group (and set the permissions on what they can do with the document before you send it).
8. To change permissions with existing groups on the list: click the arrow beside their permissions icon and select either: Can view, Can edit, or Stop sharing.
9. To give access to people or Groups not on the list: click the + beside **Direct Access**.



Direct access

Grant access

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Enter a name or email address

Can edit

Add a message (optional)

Notify people

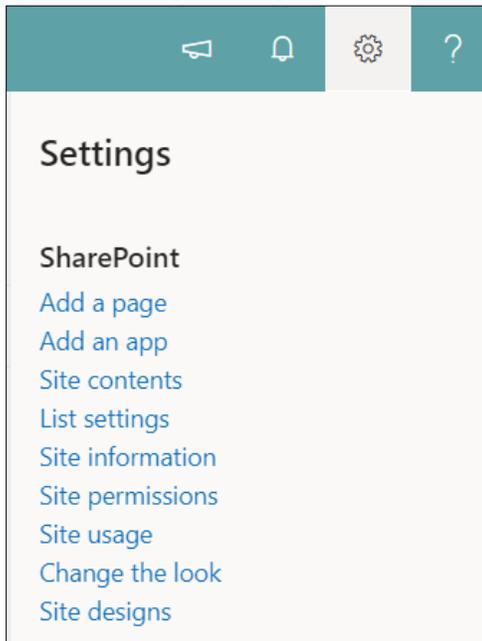
Grant access

10. Enter the name, set the permissions with the dropdown menu, and click **Grant access**.



SharePoint: Setting Entry Viewing Permissions for Individual Lists

1. Sign in to your Office365 account and open SharePoint.
2. Open the SharePoint site you want to work with. You must be an Owner to make these changes.
3. Click on the name of the list you want to edit. Lists can be created by going to **Site contents**, clicking **New** and choosing **List**.
4. Open Settings: the gear on the top right.



Note: the settings options are different depending on where you are in SharePoint.

5. Click **List settings**.
6. Click **Advanced settings**.
7. Beside Item-level Permissions, you will see **Read access** and **Create and Edit access**. Select the options 'Read items that were created by the user' and 'Create items and edit items that were created by the user'. These options are useful for lists where you want non-Owners to only see their own entries (example: vacation requests, technology assistance questions, etc.).

For more step-by-step guides on how to use Office 365 features, please go to:

<https://www.sd57curriculumhub.com/office-365>

Version	Date	Description
4.0	August 2020	New documentation for Microsoft 365