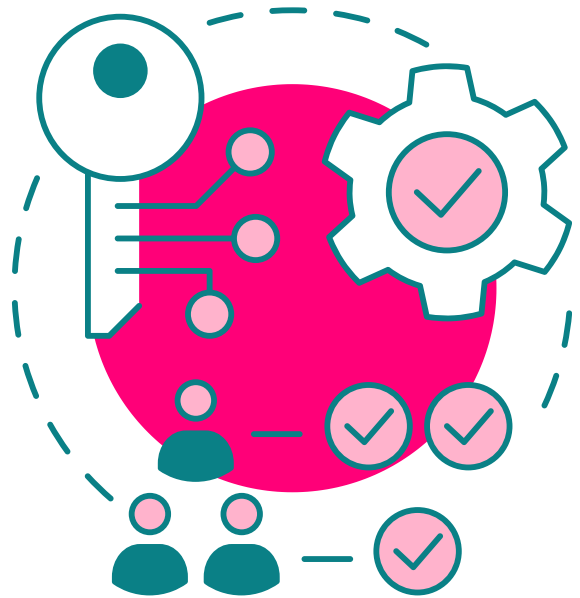## SIMPLY SHAREPOINT

A STEP-BY-STEP GUIDE TO
MANAGING PERMISSIONS

Where do I manage Permissions?

SITE LEVEL

- Navigate to **Site Settings**
- Select **Site Permissions**
- Add **users** to **groups** or assign custom permission levels

LIBRARY LEVEL

- Open the **Library**
- Go to **Library Settings**
- Select **Permissions**
- Break inheritance if needed and assign specific permissions

FOLDER/DOCUMENT LEVEL

- Locate the **Folder**
- Select **Manage Access** from the **... elipses**
- Stop inheritance and add users or groups

WHAT ARE THE DIFFERENT PERMISSION LEVELS?

Full Control: Administrators manage the site, library, or list.
Edit: Users can add, edit, and delete items.
Contribute: Users can add and edit items but not delete them.
Read: View-only access to content.
View Only: Restricts users to viewing only non-editable content.

GROUPS

- **Owners**: Full control over the site and settings.
- **Members**: Permission to add, edit, and collaborate on content.
- **Visitors**: Read-only access to view content.

Key Concepts

- **Inheritance**: Permissions flow from parent objects (**site > library > document set > item**). Break inheritance to customise permissions.
- **Custom Groups:** Tailor groups to meet organisational needs.
- **Permission Levels:** Assign predefined or custom levels for precise control.

BEST PRACTICES

Keep It Simple
Manage permissions at the site or library level where possible.

Plan Information Architecture
Group content with similar permissions requirements

Minimise Inheritance Breaks
Limit unique permissions to reduce complexity

Audit Regularly
Periodically review permissions to maintain accuracy.

TIPS FOR EFFICIENT PERMISSIONS MANAGEMENT

- Use predefined **SharePoint Groups** for streamlined access.
- Avoid **excessive item-level permissions** to simplify management.
- Conduct **regular audits** to ensure security.
- Maintain **documentation** of changes for troubleshooting.