

SharePoint Permissions



A Quick Start Guide by MET IT

Use Cases • MS Teams Management • Direct Access Management • Shared Links Management

Use Cases

In SharePoint, a “Document Library” is a secure place for your department to store your various files. The common use cases for Document Libraries are as follows:

- **Unrestricted Libraries** – Libraries that are available to the entire department.
- **Restricted Libraries** – Libraries that are restricted to a subset of the department.
- **Shared Libraries** – Libraries that hold unrestricted or restricted content that is shared with those outside of the department.

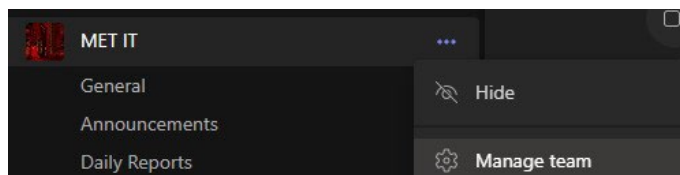
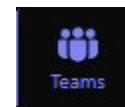
MS Teams Management

For Unrestricted Libraries, your department’s Microsoft Teams group membership is what controls access. There are two processes that are used for controlling membership:

- **Automated Process** – Our MET Onboarding Service Account and automated scripts will handle membership access during onboarding and offboarding.
- **Manual Process** – Owners of the Microsoft Teams group may manually adjust the membership of their team.

Owners who wish to manually adjust their team can access the options menu as follows:

1. In the Microsoft Teams application, click on the “Teams” icon in the left-hand navigation.
2. Click on the “... More Options” icon directly next to the Team name, then select “Manage Team”.



From the “Members” tab, owners are able to...

- **...Add Members**
 - b. Click on the blue “Add member” button to the upper right of the member list.
 - c. Enter the name(s) or email(s) of the new members, then click “Add”.
 - a. Verify all the members appear in the new member list, then click “Close”.
- **...Remove Members**
 - a. Click on the “Members and Guests” title to expand the collapsed Member list.
 - b. Click on the “X” icon to the far right of the user.

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NOTE:

The following permission management methods work on folders and files within a Document Library. Both Owners and Members can follow these steps. Owners will be sent an approval email for changes requested by Members.

Direct Access Management

For Restricted and Shared Libraries, Direct Access is one of two methods that can be used to control permissions.

MET IT recommends Direct Access for those individuals who will have long term access or are part of the department.

By default, each document library has three permission groups:

- Department Owners – Employees with the “owner” role in Microsoft Teams.
- Department Members – Employees with the “member” role in Microsoft Teams.
- Department Visitors – Unused group.

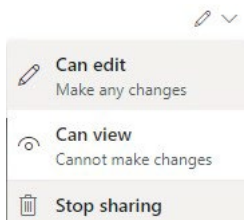
In order to restrict the permissions to a particular folder within the document library, follow these steps:

1. In a web browser, navigate to the desired folder in SharePoint.
2. Click on the information icon in the upper right-hand corner of the ribbon.



3. In the right-hand panel, click “Manage Access” to open the Manage Access pop-up menu.

4. In the access list, click on the pencil icon for the Department Members and Department Visitors groups, then click “Stop Sharing”.



5. Click on the “+” icon next to the “Direct Access” title.

You can now add the name(s) or email(s) you wish to provide access, indicate edit or read-only permission levels, and create a custom notification message.

Shared Links Management

Shared Links are the second way to handle Restricted and Shared Library permissions.

MET IT recommends Shared Links for temporary access or for those individuals outside of MET.

Creating A New Shared Link

1. In a web browser, navigate to the desired folder in SharePoint.
2. Click on the “Share” button in the ribbon above the list.
3. In the “Copy Link” section of the pop-up, click on the text that reads “People with existing access can use this link”.
4. Change the option to “Specific People”, then enter the names/emails you wish to add. You can adjust the permissions to edit or read.
5. Click “Apply”, then click “Copy” to copy the sharing link to your clipboard.

You can now paste the link into MS Teams or an email for sharing.

Modifying Shared Links

1. Follow steps 1-3 listed in the **Direct Access Management** section.
2. Click on the “...More Options” icon next to the link you wish to update.

Within the link edit menu, you are able to do the following:

- **Add Members:** Add name(s)/email(s) to the bottom of the pop-up.
- **Remove Members:** Click the “X” next to a member’s name.
- **Change Permission Level:** Click the drop down menu in the “Sharing Settings” area.
- **Delete Link:** Click on the “X” next to the sharing link.