

Adding Users to Permission Groups: SharePoint Site

Brief Overview:

This document will guide you through the process of adding a new user to the Site Permissions Group in SharePoint. To ensure proper access, there are two groups that users should be assigned to:

SBPD Staff Group: This group provides staff members limited control over the SharePoint site. Users granted permission to read and write in a specific list can do so according to the permissions set for that list. However, it's important to note that these users need full control over the SharePoint site. Instead, their permissions are limited to the specific list(s) they have been granted access to.

SBPD IT Department Group: This group grants users full control over the SharePoint site, allowing them to access and modify all lists within the site. Users in this group can read and write to any list and manage permissions and settings for the site.

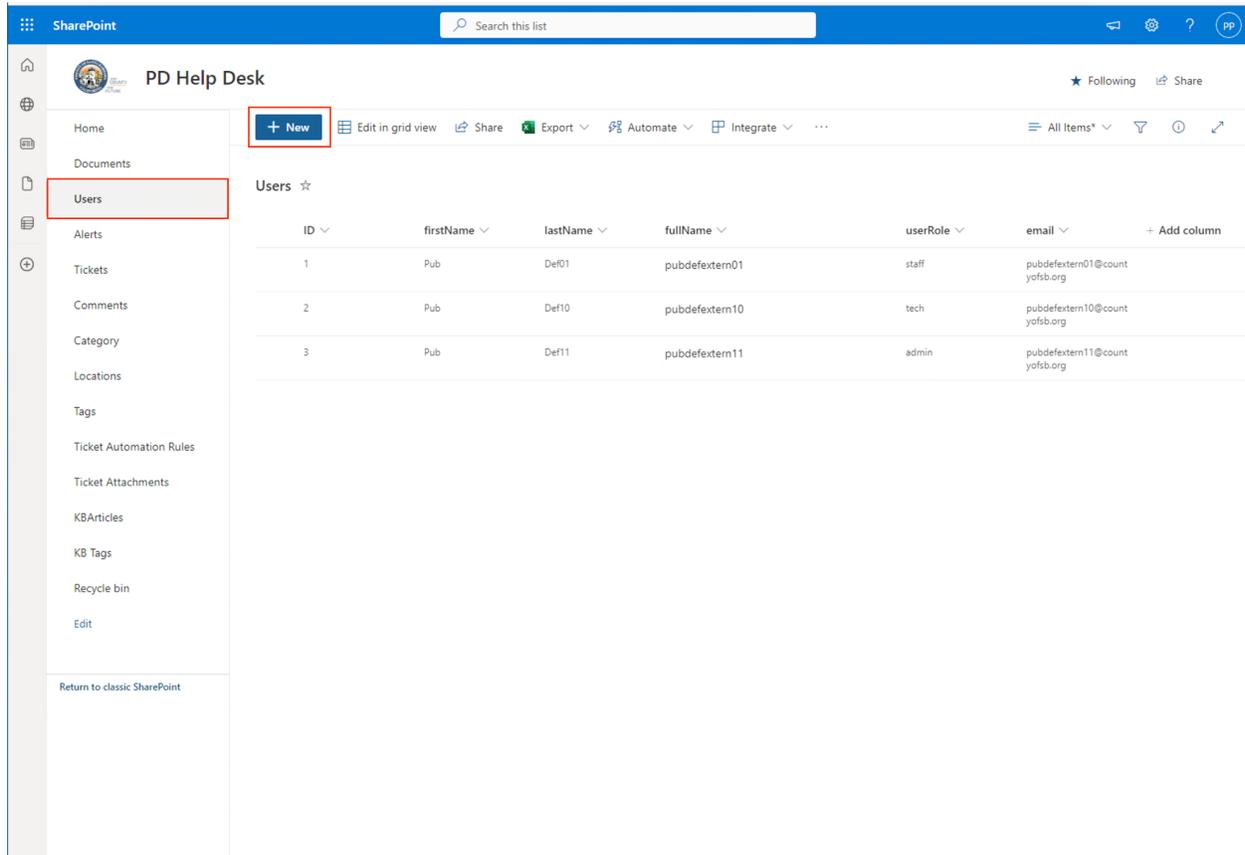
- SBPD IT Department
- SBPD Staff

- SharePoint Group Full Control
- SharePoint Group Contribute

**To add a new user, you must first create a new record for them in the "Users" list on SharePoint. Once the record has been created, you can add the user to the appropriate Site Permission Group.

Creating a new user in SharePoint:

1. Navigate to the SharePoint Site URL
2. Select the “Users” List on the left-hand side and then click “+ New” button.



The screenshot shows the SharePoint interface for a list named 'Users'. The left-hand navigation pane is visible, with 'Users' selected. The main area displays a table with the following columns: ID, firstName, lastName, fullName, userRole, and email. The table contains three rows of data:

ID	firstName	lastName	fullName	userRole	email
1	Pub	Def01	pubdefextern01	staff	pubdefextern01@count.yofsb.org
2	Pub	Def10	pubdefextern10	tech	pubdefextern10@count.yofsb.org
3	Pub	Def11	pubdefextern11	admin	pubdefextern11@count.yofsb.org

3. Fill out the form.
 - a. userRole should only be one of the three options: admin, tech, staff
 - b. Click save when you have filled out all fields

The screenshot shows a SharePoint interface for a 'PD Help Desk' site. A 'New item' form is open for the 'Users' list. The form contains the following fields and values:

Field	Value
fullName *	Deepak Budwani
userRole *	adminj
email *	dbudwani@countyofsb.org
firstName	Deepak
lastName	Budwani
Attachments	Add attachments

The 'Save' button is highlighted with a red box. The background shows a table with three existing users:

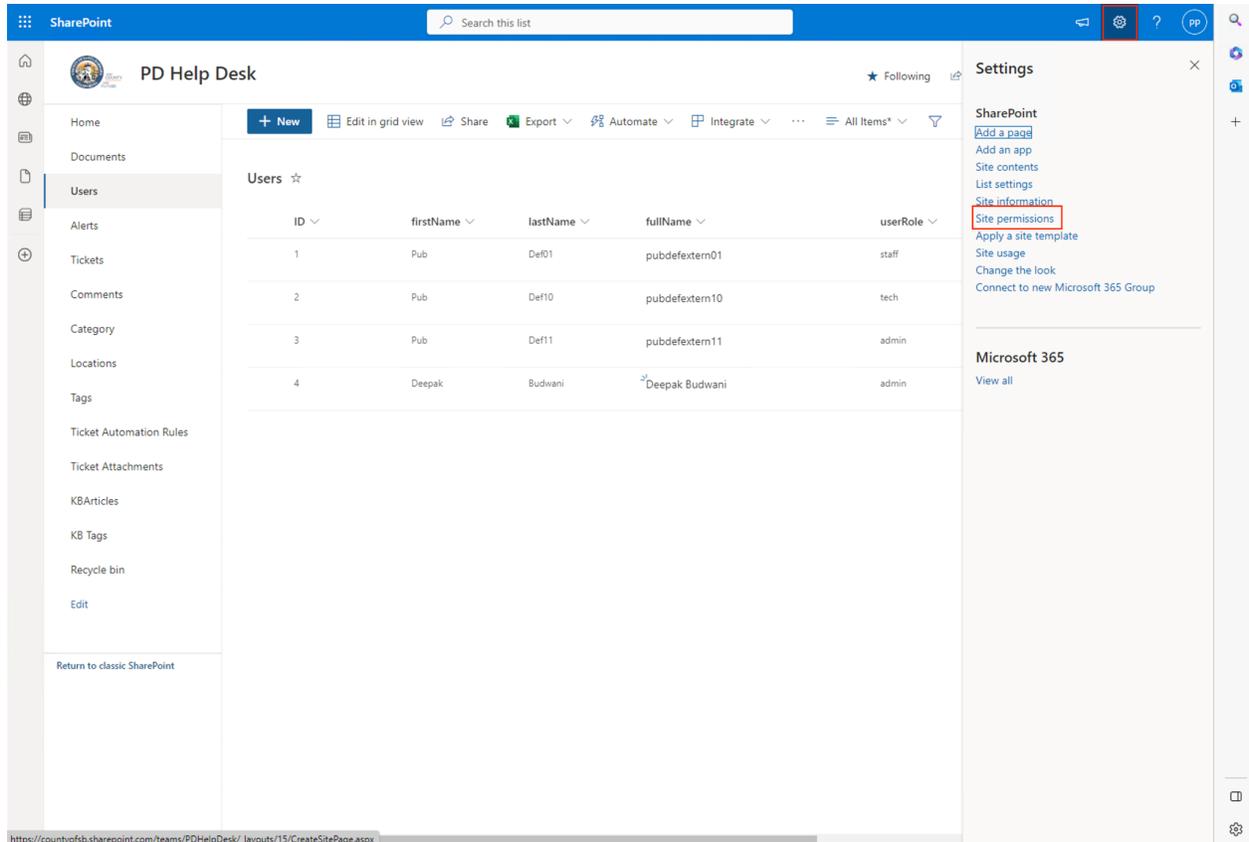
ID	firstName	lastName
1	Pub	Def01
2	Pub	Def10
3	Pub	Def11

4. The user is now created in the SharePoint List “Users”
 - a. Move on to “Adding a user to the Site Permission Groups”

Adding a user to the Site Permissions Group:

Once a user has been added to the “Users” List.

1. Navigate to the SharePoint Site URL
2. Select the “Users” List on the left-hand side and then click the settings icon on the top right of the page.
3. Select the option “Site permissions”



The screenshot shows the SharePoint interface for a site named "PD Help Desk". The left-hand navigation pane is open, showing the "Users" list selected. The main content area displays a table of users. The right-hand "Settings" menu is open, and the "Site permissions" option is highlighted with a red box. The URL at the bottom of the browser window is https://countyofsb.sharepoint.com/teams/PDHelpDesk/_layouts/15/CreateSitePage.aspx.

ID	firstName	lastName	fullName	userRole
1	Pub	Def01	pubdefextern01	staff
2	Pub	Def10	pubdefextern10	tech
3	Pub	Def11	pubdefextern11	admin
4	Deepak	Budwani	Deepak Budwani	admin

- Click on the "Advanced permissions settings" link at the bottom of the new menu view to access advanced settings.

The screenshot shows the SharePoint 'Users' list for the 'PD Help Desk' site. The list contains four users. On the right, the 'Permissions' pane is open, showing a message: 'There are additional groups or people with permissions on this site. To see them, please visit Advanced permissions settings.' This message is highlighted with a red rectangular box.

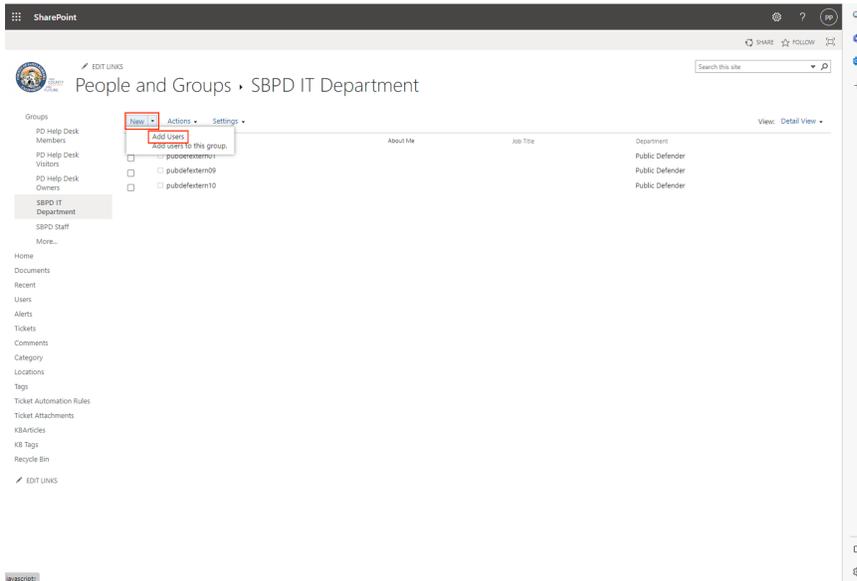
ID	firstName	lastName	fullName	userRole
1	Pub	Def01	pubdefextem01	staff
2	Pub	Def10	pubdefextem10	tech
3	Pub	Def11	pubdefextem11	admin
4	Deepak	Budwani	Deepak Budwani	admin

- Select the group where you want to add the new user by clicking on its name, which will take you to that group.

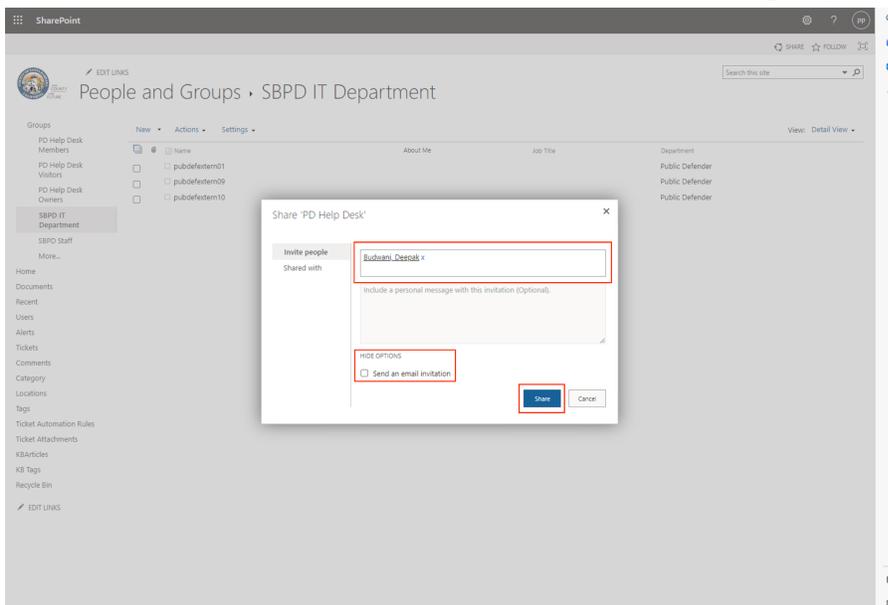
The screenshot shows the 'Permissions' page in SharePoint. The 'PERMISSIONS' section is active, displaying a list of groups and their permission levels. The 'SBPD IT Department' group is highlighted with a red rectangular box.

Name	Type	Permission Levels
<input type="checkbox"/> Name		
<input type="checkbox"/> PD Help Desk Members	SharePoint Group	Edit
<input type="checkbox"/> PD Help Desk Owners	SharePoint Group	Full Control
<input type="checkbox"/> PD Help Desk Visitors	SharePoint Group	Read
<input type="checkbox"/> SBPD IT Department	SharePoint Group	Full Control
<input type="checkbox"/> SBPD Staff	SharePoint Group	Contribute

6. To add a new user, click the "New" button and select the "Add User" option from the dropdown menu.

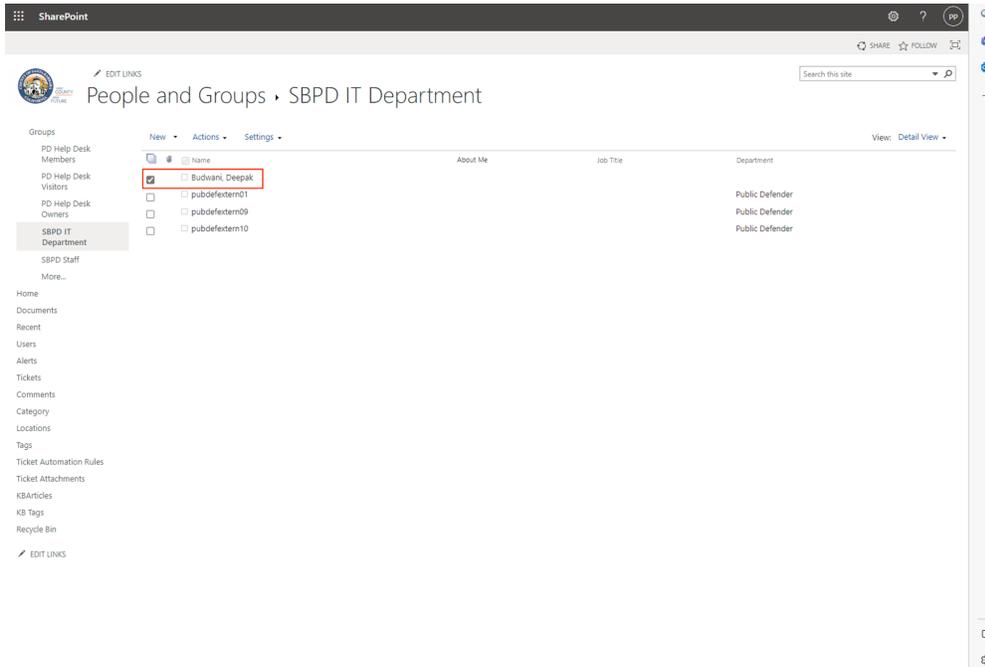


7. To add a user to the group, follow these steps:
 - a. In the first text box, enter the user's email address. You can add multiple users by separating their email addresses with a comma.
 - b. Optionally, include a message to provide context for the user(s) being added.
 - c. Click "Show Options" to reveal additional settings.
 - d. Select or deselect the option to email the user(s) notifying them that they have been added to the group.
8. Click the "Share" button to save the user to the group.

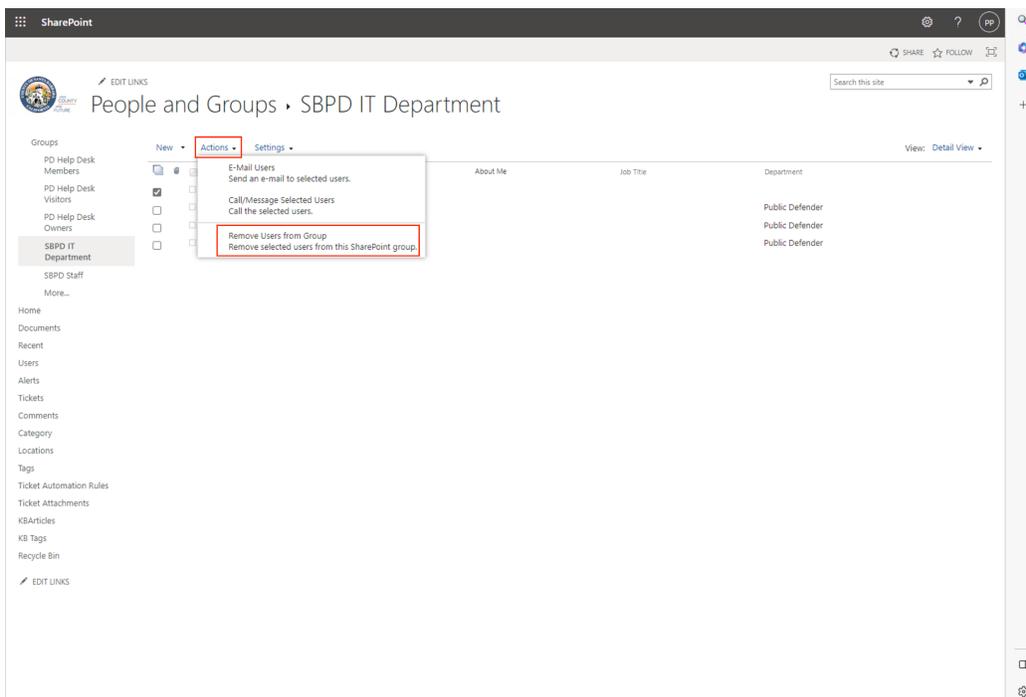


Removing a user From a Permission Group:

1. To proceed, please follow the steps outlined in the "Adding a User to the Site Permissions Group" section, steps 1 through 5.
2. To remove a user, select the checkbox next to their name.



3. To remove users from a group, select the "Action" button and choose "Remove Users from Group" from the dropdown menu.



- An alert message will ask you to confirm the user you want to remove. Verify that you have selected the correct user and click "OK" to remove them from the group.

The screenshot shows the SharePoint 'People and Groups' page for the 'SBPD' group. A confirmation dialog box is displayed in the center, titled 'countyofsb.sharepoint.com says'. The dialog contains the text: 'You are about to remove the following members from the group: Budwani, Deepak. Do you want to remove these members?'. Below the text are two buttons: 'OK' (highlighted with a red box) and 'Cancel'. The background page shows a list of group members with columns for 'About Me', 'Job Title', and 'Department'. The 'SBPD IT Department' group is selected in the left-hand navigation pane. An 'Actions' menu is open over the list, showing options like 'E-Mail Users', 'Call/Message Selected Users', and 'Remove Users from Group'.

Group	Members	About Me	Job Title	Department
PD Help Desk	Members			
PD Help Desk	Visitors			Public Defender
PD Help Desk	Owners			Public Defender
SBPD IT	Department			Public Defender
SBPD Staff				