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	SharePoint Group	Full Control
□ SBPD Staff	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.

? (PP)				this list	✓ Search		nt	SharePoint	
Share	★ Following 🖄 SI		PD Help Desk						
i) 🗸	\equiv All Items* \lor \bigtriangledown (= ,	🖁 Automate 🗸 🗄 Integrate 🗸	🗴 Export 🗸	🗄 Edit in grid view 🛛 🖻 Share	+ New		Home	
					•		nents	Docume	
						Users 🔅		Users	
d column	email \checkmark + Add	userRole \vee emai	fullName \vee	lastName	firstName ∨	$ID \lor$		Alerts	
	pubdefextern01@count yofsb.org	staff pubd yofsb	pubdefextern01	Def01	Pub	1	5	Tickets	
	pubdefextern10@count yofsb.org	tech pubdi yofsb	pubdefextern10	Def10	Pub	2	ents	Commen	
	pubdefextern11@count vofsb.org	admin pubd vofsb	pubdefextern11	Def11	Pub	3	ory	Category	
	,	,					ons	Location	
								Tags	
							Automation Rules	Ticket Au	
							Attachments	Ticket At	
							cles	KBArticle	
							S	KB Tags	
							e bin	Recycle b	
								Edit	
							-lassic SharePoint	Return to clas	
								inclain to clu	
							Automation Rules Attachments cles is e bin classic SharePoint	Ticket Au Ticket At KBArticle KB Tags Recycle b Edit	

- 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

	SharePoint		₽ Search	this list		⊲ ©	?
Ŵ	🔞 PD Help D	esk			🗟 Save 🗙 Cancel 🗞 Copy link	C)	ş ~
⊕	- IUNR	-L Nove 🖽 Edi	tia ariduiau 10 Chara	Emert V	New item		
011)	Documents		tingna view 🔄 snare	Export V	📼 fullName *		
C	Users	Users ☆			Deepak Budwani		
₽	Alerts	ID \smallsetminus	firstName \smallsetminus	lastName \sim	🗠 userRole *		
Ð	Tickets	1	Pub	Def01	lagund		
	Comments	2	Pub	Def10	email ⁻ dbudwani@countyofsb.org		
	Category	2		0.44	🖮 firstName		
	Locations	3	Pub	Def11	Deepak		
	Tags				🕾 lastName		
	Ticket Automation Rules				Budwani		
	Ticket Attachments				Attachments		
	KBArticles				Add attachments		
	KB Tags				Save		
	Recycle bin						
	Edit						
	Return to classic SharePoint						

- 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"

	SharePoint		🔎 Search t	his list			🖘 🚳 ? 📭	۹ (
Â	🔞 🔄 PD Help D	Desk				★ Following 🖻	Settings ×	۵ ۵
	Home	+ New 🗄 Edit in g	grid view 🖄 Share	🚺 Export 🗸 🦻 A	utomate 🗸 🕀 Integrate 🗸 🕂	\cdots = All Items* \vee ∇	SharePoint	+
6	Documents						Add an app Site contents	
U	Users	Users ☆					List settings Site information	
	Alerts	ID \vee	firstName \vee	lastName \vee	fullName \vee	userRole \vee	Site permissions Apply a site template	
\oplus	Tickets	1	Pub	Def01	pubdefextern01	staff	Site usage Change the look	
	Comments	2	Pub	Def10	pubdefextern10	tech	Connect to new Microsoft 365 Group	
	Category	3	Pub	Def11	pubdefextern11	admin		
	Locations		Desert	Produceni	^{Al} Densel Ruders'	adaria.	Microsoft 365	
	Tags	4	Беерак	budwani	Deepak Budwani	admin		
	Ticket Automation Rules							
	Ticket Attachments							
	KBArticles							
	KB Tags							
	Recycle bin							
	Edit							
	Return to classic SharePoint							
								ŝ
https://	countyofsb.sharepoint.com/teams/PDHelpDe	esk/_layouts/15/CreateSitePage.aspx						5

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

			₽ Search t	nis list			Permissions	×	9
Â	🔞 👷 PD Help D)esk				★ Following	Manage who has access to this site.		0
	Home	+ New 🖽 Edit	in grid view 📝 Share	🛛 Export 🗸 🥳 🖉	Automate \vee 🕀 Integrate \vee .	·· 🚍 All Items* 🗸 🖓	${\scriptstyle\checkmark}$ Site owners - full control \odot		+
	Documents						\vee Site members - limited control \mathbb{O}		
U	Users	Users 😒					\vee Site visitors - no control \odot		
₽	Alerts	ID \sim	firstName \vee	lastName \smallsetminus	fullName \sim	userRole \sim	Site Sharing Change how members can share		
÷	Tickets	1	Pub	Def01	pubdefextern01	staff	Guest Expiration		
	Comments	2	Pub	Def10	pubdefextern10	tech	Your organization does not require guest		
	Category	3	Pub	Def11	nubdefextern11	admin	Manage		
	Locations				passessentit		There are additional groups or people with		
	Tags	4	Deepak	Budwani	Deepak Budwani	admin	permissions on this site. To see them, please visit Advanced permissions settings.		
	Ticket Automation Rules								
	Ticket Attachments								
	KBArticles								
	KB Tags								
	Recycle bin								
	Edit								
	Return to classic SharePoint								
								0	
		<						8	3

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

::: SharePoint		(PP)	Q
BROWSE PERMISSIONS		🖸 SHARE 🏠 FOLLOW 🖂	0
Grant Create Permissions Group Grant Modify	Al Permission Levels Gal Access Entrops Creats Femalosis Call Access Entrops Creats Femalosis Call Access Entrops Creats Manage Creats		₫ +
Home C Documents C Necent C Users C Alerts C Continents C Continents C Continents C Continents C Category L Locations T Tags Attachments KBA Tacks	Name Type Permittation Laters PO Help Desk Members SharePoint Group Edit D Help Desk Vorters SharePoint Group Raid D Thelp Desk Vorters SharePoint Group Raid StarePoint Group Fall Centrol StarePoint Group StarePoint Group StarePoint Group Fall Centrol StarePoint Group StarePoint Group Fall Centrol StarePoint Group StarePoint Group Fall Centrol StarePoint Group StarePoint Group Contribute		
A unga Royole Ein P EDT LINKS			

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

::: SharePoint	۲	? 꼗	Q,
	Q shate 🟠	FOLLOW (D)	0
	Search this site	* <i>p</i>	0
People and Groups • SBPD IT Department			+
Groups New • Actions • Settings •	View: Det	ail View 🗸	
PU Histy Leask Add Users's Add			
PD Help Desk Public Defender Visitors Public Defender			
PD Help Desk Debuterner			
Onites Sapo IT			
Department			
S&PD Staff			
More			
Home			
Upcuments			
ARCON			
UNIS Advert			
Autris Tudoan			
INRES Commenter			
Conservation			
Langury			
Trikat Automation Bulas			
Ticket Attachments			
KRanticles			
AR Taot			
Recycle Bin			
/ IDTUNS			
			8
34/35/191			

- 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.

:::: SharePoint						(B ? (PP)	٩
						Q SHARE	습 FOLLOW (回)	0
EDIT	UNKS					Search this site	٩ *	•
Peo	ple and Groups 🛛	SBPD IT D	epartment					+
Groups	New • Actions • Settings •					View:	Detail View •	
PD Help Desk Members	🔲 🖉 🖂 Name		About Me	Job Title	Department			
PD Help Desk	pubdefextern01				Public Defender			
PD Help Desk	pubdefextern09				Public Defender			
Owners	pubdefextern10			×	Public Defender			
SBPD IT Department		Share 'PD Help L	Jesk'					
SBPD Staff								
More		Invite people	Budwani, Deepak ×					
Home		shared with						
Documents			Include a personal message with th	is invitation (Optional).				
Users								
Alerts								
Tickets				6				
Comments			HIDE OPTIONS					
Category			Send an email invitation					
Locations				Share Cancel				
Tags Ticket Automation Rules								
Ticket Attachments								
KBArticles								
KB Tags								
Recycle Bin								
EDIT LINKS								
								m
								53

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.

SharePoint					:
					🖸 SHARE 🏠 FOLLOW
	T LINKS			Search t	his site 💌 🗸
🥯 📰 Peo	pple and Groups • SBPD IT	Department			
Circups PD-Help Desk Members PD-Help Desk Viviators PD-Help Desk Owners SBPD T Department SBPD Staff More come cent Viviators SBPD staff Viviators Viviat	New Actions Settings Image: Set an an email to selected users. Set an an email to selected users. Image: Call/Message Selected Users Call/Message Selected Users Image: Call the selected users. Call the selected users.	About Me	Job Tite	Department Public Defender Public Defender Public Defender	View: Detail View -
rts inments egory ations					
cet Automation Rules ket Attachments Articles Tags cycle Bin					
' EDIT LINKS					

4. 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.

iii SharePoint	countyofsb.sharepoint.com says You are about to remove the following members from the group: Budwani, Deepak Do you want to remove these members?	© ? (P) ⊂ Ç share ☆ roucow (E) С
People and Groups • SBPD	OK	Search this site • P
Groups PO Help Deak PO Help Dea	About Me Job Tite	Vee: Detail Veer - Department Public Defender Public Defender
pearcript		 ;;