

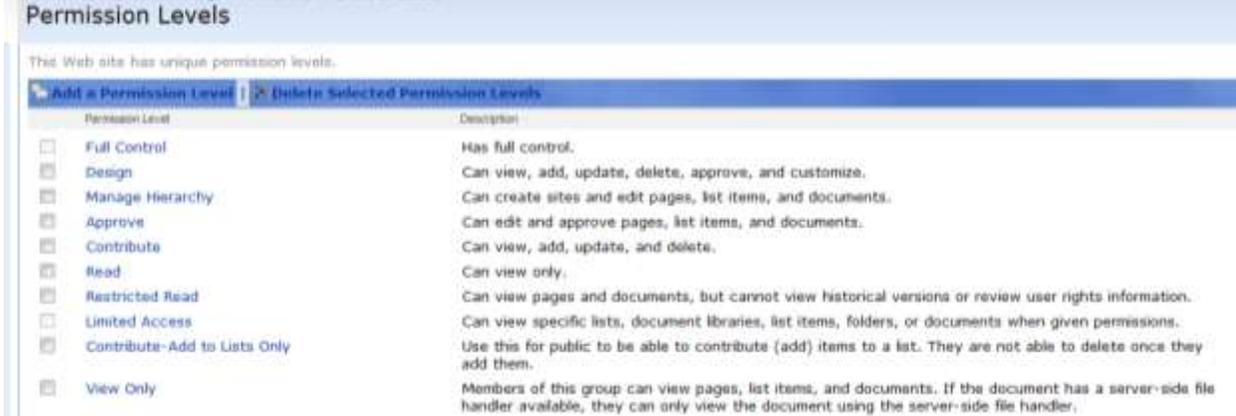
SharePoint Best Practices

Security

A fundamental responsibility concerning site security is to manage who can access resources on your site. The following outlines specifics and best practices in doing just this.

1. Permissions Levels

- a. SharePoint has various Default levels of Permissions. This includes all of those shown below, except for a custom one that was created by a user (Contribute-Add to Lists Only).



The screenshot shows the 'Permission Levels' page in SharePoint. It lists various permission levels with checkboxes and descriptions. The levels are: Full Control, Design, Manage Hierarchy, Approve, Contribute, Read, Restricted Read, Limited Access, Contribute-Add to Lists Only, and View Only. The 'Contribute-Add to Lists Only' level is highlighted in blue, indicating it is the custom level mentioned in the text.

Permission Level	Description
<input type="checkbox"/> Full Control	Has full control.
<input type="checkbox"/> Design	Can view, add, update, delete, approve, and customize.
<input type="checkbox"/> Manage Hierarchy	Can create sites and edit pages, list items, and documents.
<input type="checkbox"/> Approve	Can edit and approve pages, list items, and documents.
<input type="checkbox"/> Contribute	Can view, add, update, and delete.
<input type="checkbox"/> Read	Can view only.
<input type="checkbox"/> Restricted Read	Can view pages and documents, but cannot view historical versions or review user rights information.
<input type="checkbox"/> Limited Access	Can view specific lists, document libraries, list items, folders, or documents when given permissions.
<input type="checkbox"/> Contribute-Add to Lists Only	Use this for public to be able to contribute (add) items to a list. They are not able to delete once they add them.
<input type="checkbox"/> View Only	Members of this group can view pages, list items, and documents. If the document has a server-side file handler available, they can only view the document using the server-side file handler.

- b. To access the Permission levels, you:
1. Login to the site
 2. Click on **Site Actions** -> **Site Settings** -> select **Advanced Permissions**
 3. Click on **Site Permissions** on the left navigation (Quick Launch)
 4. Click on the drop down menu **Settings**

Use permission levels to users and groups.



5. You can create custom levels; however, the defaults usually suffice.

- c. These permission levels are the base of the security that you will assign to groups.

BEST PRACTICE: Assign permissions to groups (NOT to individuals). You should NEVER see an individual user listed here.

2. Groups

a. Introduction

1. Groups can be setup on the main site, which then can be accessible for use on any subsite.
2. There are default SharePoint groups

Note: You can customize them by assigning any permission level to them that you want, and you can also create new SharePoint groups with the permission levels that you want.

- (1) The three default groups include:
- (a) Site name Owners: Full Control
 - (b) Site Members: Contribute
 - (c) Site name Visitors: Read

BEST PRACTICE: Remove groups you are not using. Ensure groups are named according to their purpose and make SURE they have the appropriate permissions to the site.

For Example: The members group that is created by default – should change the permission levels for that group to Read, Restricted Read or remove the group all together if you are not planning on using it.

b. Creating a New Group

1. Click on **Site Actions** -> **Site Settings** -> Select **People and Groups**
2. This opens the window below.



3. Click on **New**, select **New Group**
4. Fill in all the appropriate information for the group, including the description (make sure it specifies the purpose of the group) and select the appropriate permissions
5. Click **Create**
6. Once you create the group, you can then add users to the group.

IMPORTANT NOTES:

- ✓ Make sure you are in the right site when setting up groups. For example, if you want to set up a group in a subsite, make sure you are on THAT site when following these instructions!!
- ✓ When you create a group at a top level, you should assign whatever rights they will have across the ENTIRE site.
- ✓ If you are creating a group at the SITE (or subsite) level, you would assign whatever rights they should have to THAT site.
- ✓ Once you create a group at a subsite and assign permissions, you then go to the MAIN site group screen, and make sure that groups has a minimum of "Read" AND "Restricted Read".

c. Customize SharePoint groups

1. To meet the needs of your organization, many options are available for customizing SharePoint groups. For example, you can:
 - (1) Create a new SharePoint group
 - (2) Customize an existing group to include only the permission levels you want (except for the Limited Access permission level).
2. You can also create custom permission levels which you can then assign to your SharePoint groups.

d. Recommendations

1. If you have a sub site you can select to either inherit permissions from the parent OR you can select to have the site have its own groups.
2. If your organization has staff that should all have the same permissions on one or more securable objects, you should consider creating a SharePoint group for them.
 - (1) For example, you could create a SharePoint group editors on the HR Subsite called HR Editors.
3. Delete any unneeded SharePoint group.
4. Add Windows user accounts and Windows security groups to your SharePoint groups.
5. Remove Windows user accounts and Windows security groups from your SharePoint groups when no longer used.
6. Inherit permissions unless otherwise needed.

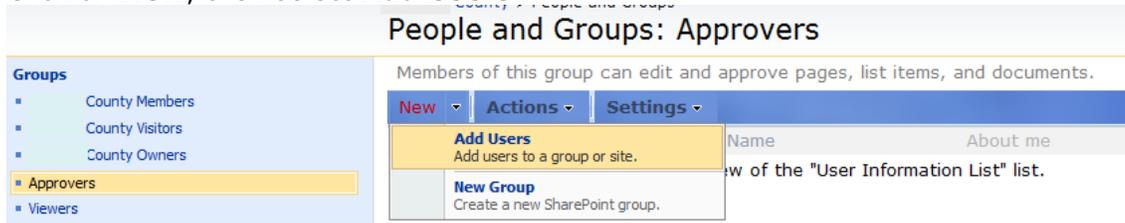
Note: Although you can, for example, assign the Design permission level to the Site name Readers group, it is more practical to create a new custom SharePoint group and assign the permission level you need to that new group. This way, you won't have SharePoint group names that imply a different permission level than they actually have.

3. Users

a. Adding Users to Groups

1. Click on **Site Actions**
2. Click on **Site Settings**
3. Click on **People and Groups**
4. Click on the group that you want to add a user.
5. This will open the group to display what users are currently in that group.

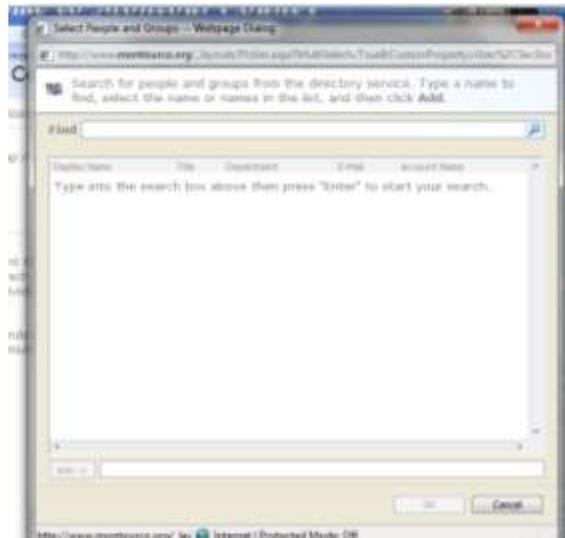
6. Click on **New**, then select **Add Users**



7. If you know their user name you can type their user name in the white box under where it states **Users/Groups**. Then click the person with the check mark to verify the name.



8. If you don't know the person's user name the book icon to Browse /Search ,
9. Type their name, Click the Search Icon.



- i. Once you do a search you may have multiple persons show, make sure you select the correct user.
- ii. Double Click the Name, Click **OK**. Once you click ok, it takes you back to the Add Users Window.
- iii. The proper group should already be selected, but you should verify.
- iv. You can send a custom welcome e-mail to the user that they were added to the 'Approvers Group.'
- v. Once you completed your message, Click **OK**.

- a. This takes you back to the **People and Groups** window and you should see the user that you just added in the Role/Group.

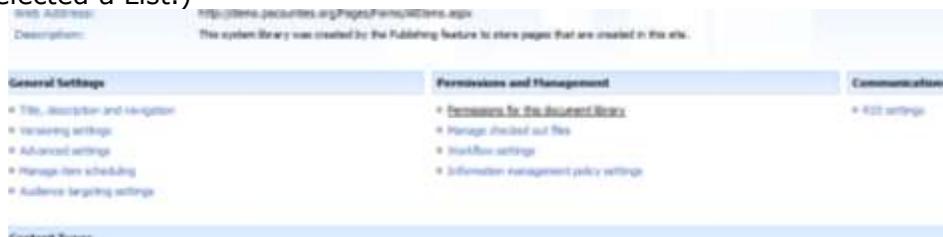
IMPORTANT NOTE: These instructions would be for ANY assignment of groups for users, just select a different group.

4. Lists / Document Libraries

- a. Most document libraries inherit permissions from the parent site when you set them up.

BEST PRACTICE: Lists are best to inherit site permissions UNLESS there is a reason / purpose to change this!

- b. If you should have a need to secure information, whether in a list such as a calendar, job postings, etc. you can manage that security separately by:
 1. Click on **Site Actions** -> **View All Site Content**
 2. Go to the **Document Library** or **List** and double click to open it.
 3. Select **Document Library Settings**
 4. Select **Permissions for this Document Library** (or it will say List if you selected a List.)



5. Set the permissions appropriately.

IMPORTANT NOTE: You **MUST** make sure that the permissions are set correctly on the Pages, Images, and Site Collection Documents document libraries in order for your users and visitors to work with the site.