SharePoint Online 'Examining' Sites Managing User Access to Folders

Contents

SharePoint Online (SPO) 'Examining' Sites
Managing User Access to Folders

This quick reference guide includes sections from the 'SPO Examining Sites Administrator Guide' and outlines how to manage user access to folders (and document/files) within a SPO site.

This quick reference guide covers the following help topics:

Managing User Access to Folders
- How do I restrict access to a folder to just one or a number of specific individuals (or SharePoint groups)?
- How do I give one or more specific individuals (or SharePoint groups) access to a folder (without changing who already has access to it)?
- How do I give one or more specific individuals (or SharePoint groups) access to a folder (that has restricted folders within it)?
- How do I give users from other departments access to a folder?
- How can I see who has access to a folder within a workspace?
- How do I reset a folder's permissions (if access to the folder has been restricted)?
- How do I remove an individual's access to a folder (if they have been given direct access to it)?
- How do I remove an individual's access to all folders that they have been given 'direct access' to within a workspace?

Managing User Access to Documents
- How do I restrict access to a document within a site?
- How do I give an individual access to a document within a site (without changing who already has access to it)?
- How can I see who has access to a document within a folder?
- How do I remove an individual's access to a document (if they have been given direct access to it)?

For details of how to manage users in SharePoint Groups see the 'Managing Users in SharePoint Groups' quick reference guide or the full 'SPO Examining Sites Administrator Guide'.

For details of how to manage folders (create, rename, move, copy etc.) see the 'Managing Folders in Sites' quick reference guide or the full 'SPO Examining Sites Administrator Guide'.

For an overview of what SPO examining sites are and what they include see the 'SPO Examining Sites - Getting Started Guide' or the full 'SPO Examining Sites Administrator Guide'.

If you prefer to see all guidance in one document, see the '**SPO Examining Sites Administrator Guide**' which contains full details of how to set-up, manage and maintain all of the aspects of your SPO examining site(s).

Getting Support

If you need advice and support in relation to SPO 'examining' sites during MT21 then please contact the e-Assessments project team on: e-assessmentproject@it.ox.ac.uk.

The project team will be providing 'early life support' during MT21 after which ongoing support arrangements will be confirmed and communicated.

SPO Examining Sites – Managing Access and Permissions

Introduction to Managing Access to Examining Sites

Access to a SPO examining site and the different sections within it is managed via **SharePoint Groups**.

SharePoint groups are the best way to give access to defined areas of a site and allow you to manage the individuals who have access to the site and various sections within it in a straightforward way.

In addition to SharePoint groups you can also use **folder permissions** within different sections of the site to manage access within sections in a more granular way where necessary. For example:

- To manage access to folders for specific markers in the Markers Workspace
- To manage access to Mitigating Circumstances folders in an Exam Board workspace

It is even possible to control who can see and access **specific documents / files** where needed.

In summary:
- **SharePoint groups** are used to manage access **TO** the different sections of a site
- **Folder/file permissions** are used to manage access **WITHIN** the different sections of a site

However, in some exceptions, you may give users access to a specific folder only in a site (and not add them to a SharePoint group also) e.g. when sharing specific folders with colleagues in other departments. See '**How do I give users from other departments access to a folder?**' in this quick reference guide.

For details about how to give other administrators in your department access to 'examining' sites see 'How do I give access to SPO examining sites to other Administrators in my Department?' in the '**SPO Examining Sites – Managing Folders**' section of the 'SPO Examining Sites Administrator Guide'.

SPO Examining Sites – Managing Folder Permissions

Introduction to Managing Folder Permissions in SharePoint Online Sites

Whilst access **to** a SPO examining site and the relevant sections within it are managed via SharePoint groups, access **within** the different sections of the site can be managed using folder permissions.

By default, all users who are part of a SharePoint group can access all folders within the sections of the site they have access to.

For example:
a) Markers added to the 'Markers' group for the site can by default access all folders within the Markers Workspace unless access to relevant folders in that workspace is restricted
b) Exam board members added to an 'XXXX Exam Board' group will have access to all folders within the associated exam board workspace (including folders containing mitigating circumstances information) unless access to relevant folders in that workspace is restricted

'Inherited' and 'Unique' Permissions

The above is the case because SharePoint permissions work on the principle of 'inheritance'.

Inheritance works on the basis that the permissions applied to a workspace (e.g. that all markers can access the 'Markers Workspace') will apply to all of the folders within the workspace too unless the permissions are changed within one or more of the folders in the workspace.

The first step in managing the permissions within a folder is therefore to 'stop inheriting the permissions' from the workspace and to set up 'unique permissions' that apply to the folder.

In that way, **'unique' folder permissions** can be used to restrict access to folders within sections of the site where necessary. For example:
- To restrict access to folders for specific markers in the Markers Workspace
- To restrict access to Mitigating Circumstances folders in an Exam Board workspace

Managing Folder Permissions – Key Rules

Please note the following key points to be aware of when managing folder permissions:

1. All users (apart from a few exceptions) should be part of a SharePoint Group

For the best user experience and most straightforward permissions management, a user who needs access to a folder in a workspace should also be part of the SharePoint group that has access to that workspace.

For example, it is NOT recommended that you give markers access only to a specific folder within an examining site and that you don't also add them to the 'Markers' SharePoint group within your sites.

Adding the markers to the 'Markers' SharePoint group, for example, will:
- Give them access to the Markers Workspace and all folders that do not have restricted access
- Allow the markers to **navigate** to the folders that you have given them specific permissions to e.g. their own folder or a folder for an assessment that contains mark sheets etc.

There will be some exceptional cases where you will give users access to specific folders ONLY (and not also give them access to the site itself via a SharePoint group). This may be the case, for example, if you are giving users in another department access to a specific folder.
However, most users of an examining site should be granted access to a site by being added to a SharePoint group. This will give the user access to Home, Useful Resources and the relevant workspace. Access to folders within the workspaces can then be managed using folder permissions.

Giving SharePoint Groups access to Specific Folders

In the same way, if you only want a SharePoint group to have access to one or more folders within a workspace, you still need to give the SharePoint group access to the workspace as a whole so that users in the new group can navigate to any folders they've been given access to within the workspace.

2. Ensure that users can navigate to the folders they should have access to

If the folder you want to restrict access to is a **sub-folder within another folder** in a workspace, then make sure that the users that you want to be able to access the sub-folder also have **access to the folders above it** – so that they are **able to navigate to the sub-folder** within the workspace.

For example, if you want a marker to have access to their own folder a few levels down within the markers workspace – e.g. if their folder is located beneath a number of other folders such as **Markers Workspace > FHS > Dissertation > Joe Bloggs** – then the marker needs access to all of the folders above theirs to be able to navigate to their folder.

To enable users to navigate within workspaces (except into folders that are restricted to specific users only), restrict access only to the actual folders that should be accessible to specific individuals

only (and not the folders above those folders also) – so that relevant users are able to successfully navigate down to folders that they should be able to access.

Other Useful Information

As well as giving specific individuals access to specific folders, you can also give SharePoint groups access to specific folders where that is the best way of managing access to a folder.

And in the same way that it is possible to restrict access to folders it is also possible to control who can see and access **specific documents / files** where that is needed too – see 'Managing Access to Documents / Files' for more information.

How do I restrict access to a folder to just one or a number of specific individuals (or SharePoint groups)?

This help topic assumes:
  a) That the folder you want to restrict access to is already accessible to one or more SharePoint groups associated with the site e.g. the 'Markers' group or an 'XXXX Exam Board' group; and
  b) That you want to restrict the access to the folder to one or more specific individuals instead of all users in the SharePoint group that have access to the workspace that the folder is in

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Other options to consider:

If you want to give an individual access to a folder without changing who already has access to the folder, see '**How do I give one or more specific individuals (or SharePoint groups) access to a folder (without changing its permissions)?**'

If you have previously restricted access to the folder and you want to remove the access of one or more of the specific individuals that currently have access, see '**How do I remove an individual's access to a folder?**'.

Alternatively, you may even want to remove someone from a SharePoint group if you no longer want them to have access to any folders within a workspace or even the site itself. See '**How do I remove users from SharePoint groups?**' in the 'Managing Users within SharePoint Groups' quick reference guide.
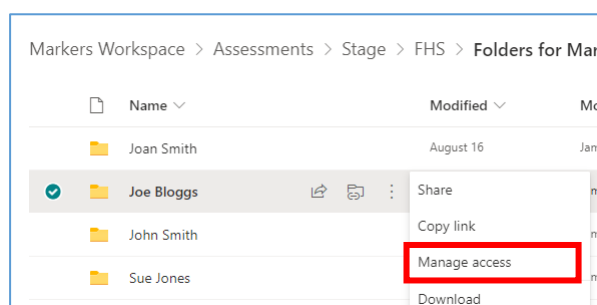

To restrict access to a folder so that only one or a number of specific individuals (or SharePoint groups) can access it, complete the following steps (once you've read the 'Key Rules' section above):
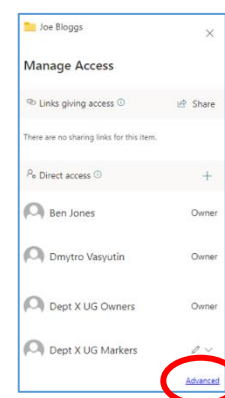
1. Navigate to the location of the folder you wish to restrict access to and click on the **three-dot 'Show actions' menu** for the folder
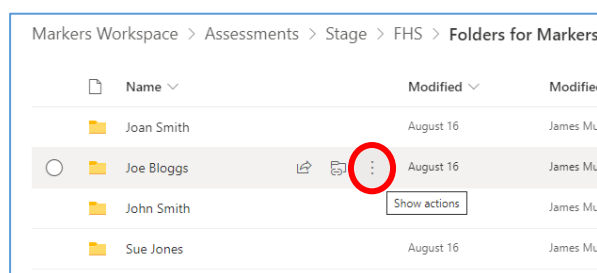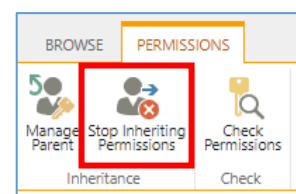

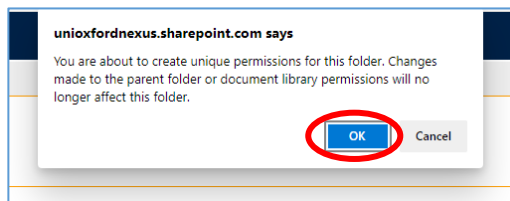2. Select the '**Manage access**' option

3. Click on the '**Advanced**' link at the bottom of the 'Manage Access' sidebar on the RH side of the screen


4. Within the folder permissions view click on '**Stop Inheriting Permissions**' and then click '**OK**'

unioxfordnexus.sharepoint.com says
You are about to create unique permissions for this folder. Changes made to the parent folder or document library permissions will no longer affect this folder.

OK   Cancel

5. To remove the SharePoint group(s) that you don't want to have access to the folder:
   a. Select the group(s) by **ticking the checkbox(es)** next to the name of the group(s)
   b. Click on '**Remove User Permissions**'
   c. Click '**OK**'
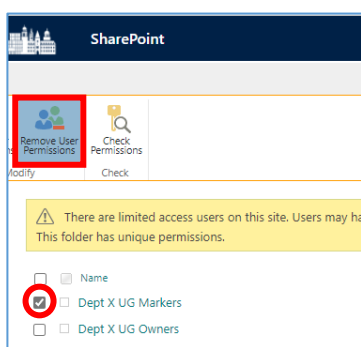
NB leave the 'Owners' group in the folder so that any administrators in the 'Owners' group can still access the folder.

6. To add the individual or individuals that you would like to be able to access the folder:
   a. Click on '**Grant Permissions**'
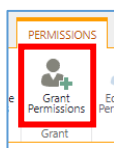
   b. Search for and select the specific user(s) or SharePoint groups that you want to have access to the folder within the box that says 'Enter names or email addresses…'

*NB to share the folder with an external (Non-SSO) user simply type in their email address.*
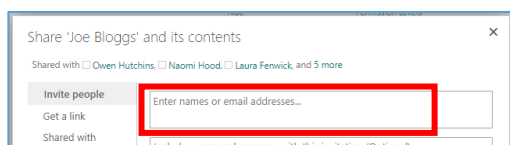
NB you can also search for and select a SharePoint group in the 'Enter names or email addresses…' box if you want to give a SharePoint group access to a folder.

   c. IF there are files or other folders **with unique permissions** *within* the folder, then:

If you untick 'Share everything in this folder, even items with unique permissions', the users (that you are giving access to the folder) will get access to everything within the folder apart from those things with unique permissions.

If you leave the 'Share everything in this folder, even items with unique permissions' option ticked the users (that you are giving access to the folder) will get access to everything within the folder.
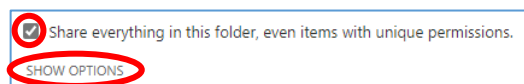
   d. Click on **SHOW OPTIONS**
   e. Only untick 'Notify people' (so that the user doesn't receive an email with a link to the folder) if they have access to the workspace the folder is in (through being part of a SharePoint group) and/or if you don't' want them to be notified

NB if you are giving an external user access (who has not yet logged into an Oxford SharePoint Online site) then it will not be possible to untick the 'Send an email invitation' box

   f. **Select the relevant permission level:** *Contribute: view, download, upload, and edit documents OR **Read:** view and download documents*
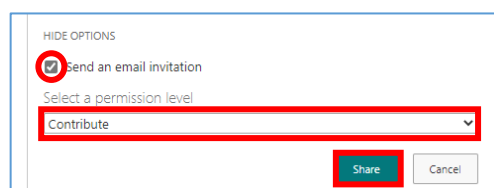
   g. Click '**Share**'

How do I give one or more specific individuals (or SharePoint groups) access to a folder (without changing who already has access to it)?

This help topic outlines how to give an individual (or SharePoint group) 'direct access' to a folder without changing who already has access to the folder.

Other options to consider:

If you want to restrict access to a folder (i.e. change its permissions) so that only one or more specific individuals can access the folder, see the following topic: '**How do I restrict access to a folder to just a one or a number of specific individuals (or SharePoint groups)?**'

If you want to give a user from another department access to an individual folder only (and not to the wider site) see '**How do I give users from other departments access to a folder?**'

If you want to give an individual access to a folder that is 'unrestricted' (i.e. to a folder that anyone with access to the workspace can access) then you may want to add the individual to the SharePoint group that has access to the workspace rather than giving them access to just the one folder. If this is the appropriate course of action, see '**How do I add users to SharePoint groups?**' ' in the 'Managing Users within SharePoint Groups' quick reference guide.
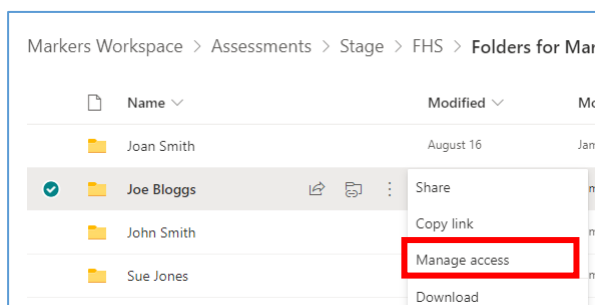

To give an individual or SharePoint group 'direct access' to a folder without changing who already has access to the folder, complete the steps outlined below.

NB if there are files or folders in the folder that are restricted to specific individuals and you don't want to give this user access to those files or folders (within the folder) follow the steps outlined in the following help topic instead: How do I give one or more specific individuals (or SharePoint groups) access to a folder (that has restricted folders within it)?
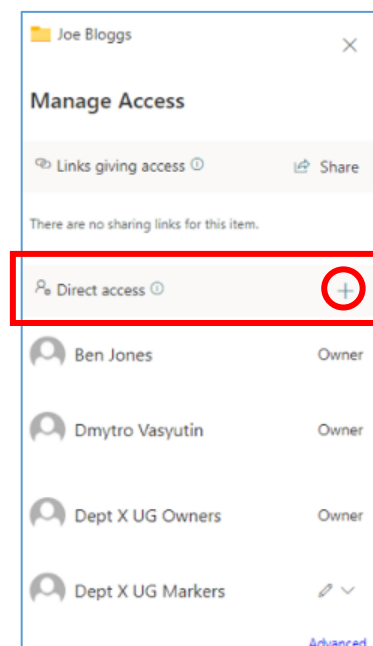
1. Navigate to the location of the folder you wish to give direct access to and click on the **three-dot 'Show actions' menu** for the folder
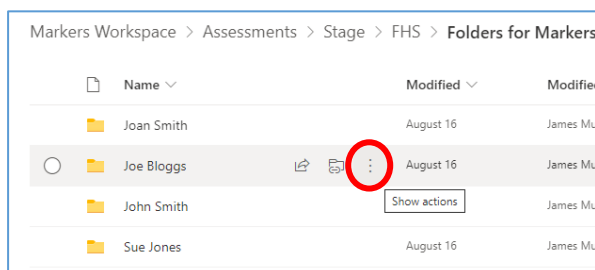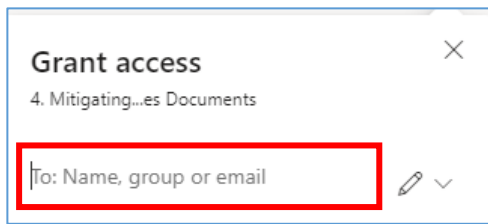

2. Select the '**Manage access**' option

3. Click on the **'Grant access' icon ('+')** within the '**Direct access**' section of the 'Manage Access' sidebar on the RH side of the screen

4. Within the '**Grant access**' pop-up window:
   a. Search for and select the individual(s) or SharePoint groups (one at a time) who you wish to give direct access to

NB to share the folder with an external (Non-SSO) user simply type in their email address.

You can also search for and select a SharePoint group in the 'Enter names or email addresses…' box if you want to give a SharePoint group access to a folder.

b. Select whether the individual(s) should have '**Can view**' (view and download documents) or '**Can edit**' (view, download, upload, edit documents)
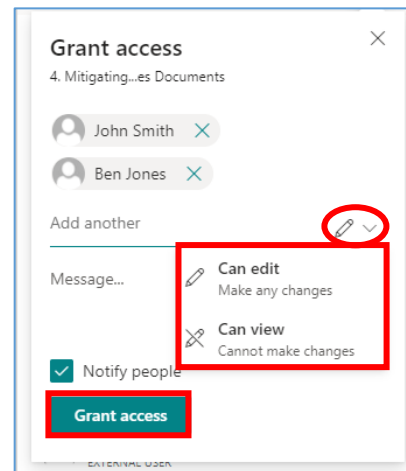
c. Click '**Grant access**'

Note that if the user(s), who you have given access to the folder to, do not already have access to the workspace that the folder is in, then you may want to add them to the relevant SharePoint group so that they can navigate to the folder within the workspace.

NB they will also get access to all 'unrestricted' folders within the workspace once they are added to the SharePoint group.

If this is the appropriate course of action, see '**How do I add users to SharePoint groups?**' in the 'Managing Users within SharePoint Groups' quick reference guide or the full 'SPO Examining Sites Administrator Guide'.

This also applies to SharePoint groups that you may have given access to the folder to – if that group does not already have access to the workspace that the folder is in, then you may want to give the group access to the workspace so that the users in the group can navigate within the workspace to the folder(s) they have been given access to:

See '**How do I give SharePoint groups access to workspaces within an examining site?**' in the 'Managing a Site's SharePoint Groups' quick reference guide or the full 'SPO Examining Sites Administrator Guide'.

How do I give one or more specific individuals (or SharePoint groups) access to a folder (that has restricted folders within it)?

If there are any files or folders, **within the folder** that you want to give an individual 'direct access' to, that are restricted to a specific set of individuals only AND you don't want the user to have access to those restricted files or folders then grant the user access to the folder as follows:

1. Navigate to the location of the folder you wish to give direct access to and click on the **three-dot 'Show actions' menu** for the folder

2. Select the '**Manage access**' option
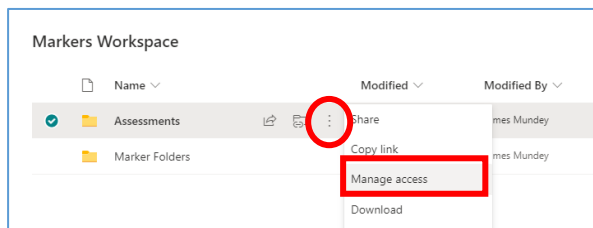
3. Click on the 'Advanced' link at the bottom of the 'Manage Access' sidebar on the RH side of the screen
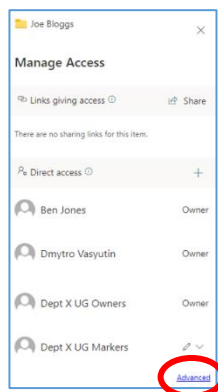
4. IF the folder inherits its permissions (i.e. the 'Stop Inheriting Permissions' button is visible within the folder permissions view), then click on 'Stop Inheriting Permissions' and then click 'OK'
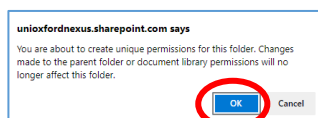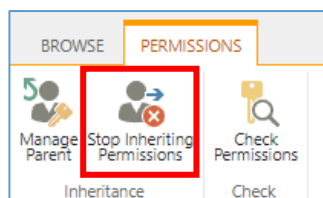

5. To **add the individual or individuals** that you would like to be able to access the folder:
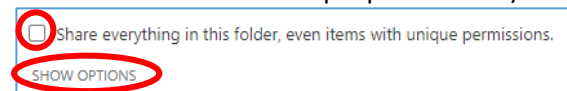   a. Click on '**Grant Permissions**'
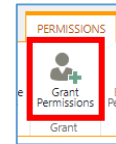
   b. Search for and select the specific user(s) or Sharepoint groups that you want to have access to the folder within the box that says 'Enter names or email addresses…'

   *NB to share the folder with an external (Non-SSO) user simply type in their email address.*
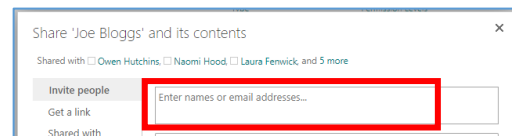
   c. Untick '**Share everything in this folder, even items with unique permissions**' (so that the users being added don't get access to the files / folders within the folder that have unique permissions)

   d. Click on **SHOW OPTIONS**

   e. Select the **relevant permission level**: '**Read**' (view/download documents) OR '**Contribute**' (view/download, upload/edit document)
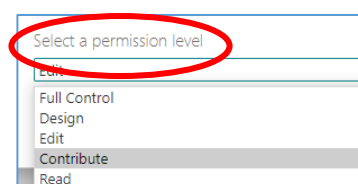
   f. Finally, click '**Share**'

How do I give users from other departments access to a folder?

Whilst exam board members, markers, and paper setters have access to the site and folders within workspaces via SharePoint groups, there are times when it is appropriate to give individual users (e.g. those from other departments who don't otherwise have access to the site) access to a specific folder e.g. when sharing a series of documents relating to a student with Information Compliance within the 'Other Document Sharing' workspace.

NB if there are files or folders in the folder (that you want to give a user from another department access to) that are restricted to specific individuals and you don't want to give this user access to those files or folders (within the folder) follow the steps outlined in the following help topic instead: 'How do I give one or more specific individuals (or SharePoint groups) access to a folder (that has restricted folders within it)?'
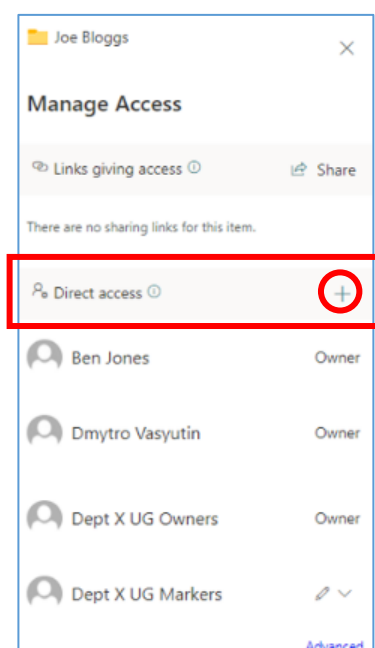
To give a user from another department access just to a specific folder:

1. Navigate to the location of the folder you wish to give direct access to and click on the **three-dot 'Show actions' menu** for the folder
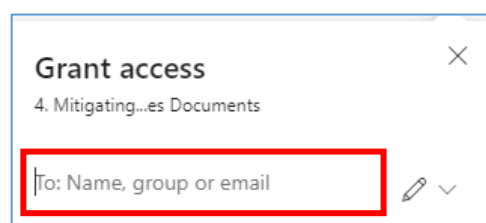
2. Select the '**Manage access**' option
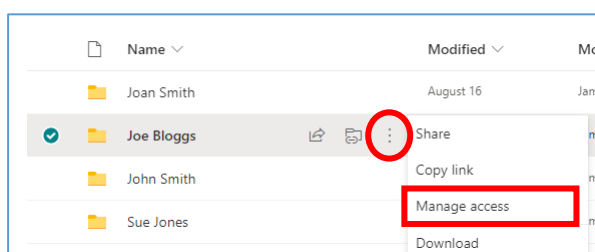
3. Click on the **'Grant access' icon ('+')** within the '**Direct access**' section of the 'Manage Access' sidebar on the RH side of the screen


4. Within the '**Grant access**' pop-up window:
   a. Search for and select the individual(s) (one at a time) who you wish to give direct access to

NB to share the folder with an external (Non-SSO) user simply type in their email address.

   b. Select whether the individual(s) should have '**Can view**' (view and download documents) or '**Can edit**' (view, download, upload, edit documents)

   c. Ensure that '**Notify people**' is ticked as that will send a link to the folder to the user
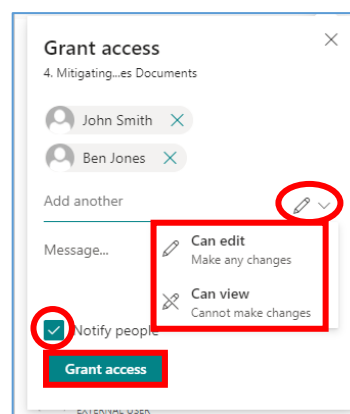

   d. Click '**Grant access**'

How can I see who has access to a folder within a workspace?

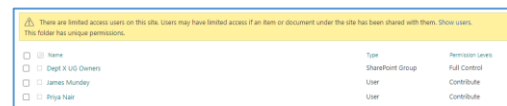To see who has access to a folder within a workspace:

1. Navigate to the location of the folder you wish to confirm who has access to and click on the **three-dot 'Show actions' menu** for the folder

2. Select the '**Manage access**' option
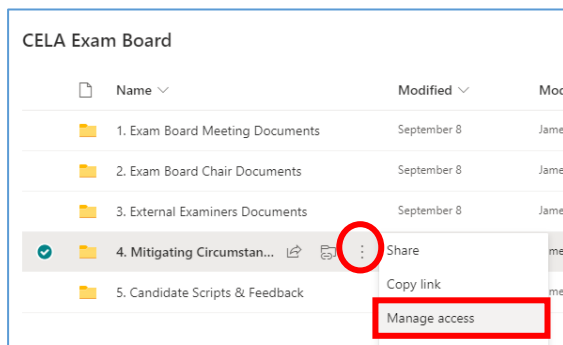
3. The '**Manage Access**' sidebar shows:

   a) The 'site collection administrators' who have access to the folder – they are the individuals listed as 'Owner'
   b) The SharePoint groups that have access to the folder (NB to see which users are part of the SharePoint group, see 'How can I see which users have been added to a SharePoint group?')
   c) Any individuals (including external users) that have been given direct access to the folder (who are not part of a SharePoint group that has access to the folder)
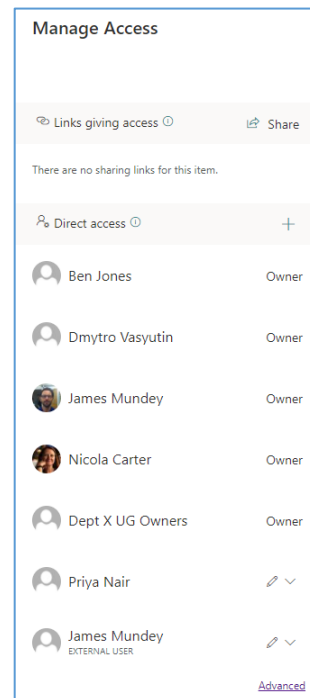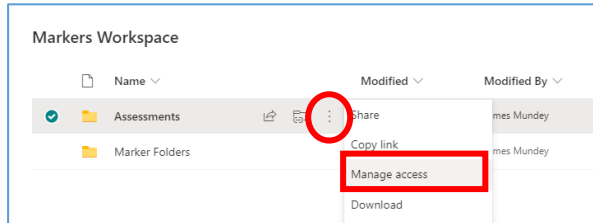

4. You can also click on the '**Advanced**' link at the bottom of the 'Manage Access' sidebar to see a different view of who has access (the site collection administrators won't be visible in this view):
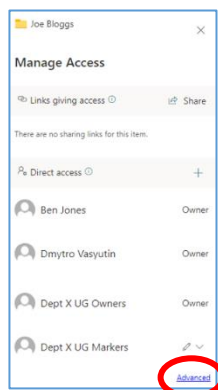
How do I reset a folder's permissions (if access to the folder has been restricted)?

To 'reset' a folder's permissions if access to the folder has been restricted, complete the following steps:
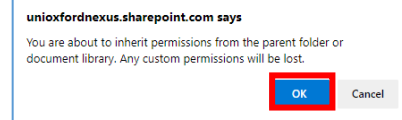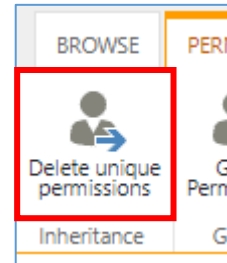
1. Navigate to the location of the folder you wish to reset the permissions for and click on the **three-dot 'Show actions' menu** for the folder

2. Select the '**Manage access**' option

3. Click on the '**Advanced**' link at the bottom of the '**Manage Access**' sidebar on the RH side of the screen

4. Within the folder permissions view, click on '**Delete Unique Permissions**' and click '**OK**'

Note that deleting a folder's unique permissions will remove the access of any users who have been given direct access to the folder.

How do I remove an individual's access to a folder (if they have been given direct access to it)?

This help topic outlines how to remove an individual's (or SharePoint group's) access to the folder if they have been given **direct access** to the folder i.e. the individual is not part of a SharePoint group that has access to it.

The scenarios in which this help topic is relevant are as follows:
   a) The folder has unique permissions i.e. its access is restricted to only one or more specific individuals who have been given direct access to it (including the individual whose access you now want to remove)
   b) You have given an individual from another department direct access to a folder and you want to remove the individual's access to the folder

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**Other options to consider:**

If you want to remove an individual's access to a folder and they have access to the folder as a result of being part of a SharePoint group (that has access to the folder) then your options are:

1. Restrict access to a folder so that only one or more specific individuals can access the folder – and in that way the individual (whose access to the folder you want to remove) will no longer have access to the folder: see: '**How do I restrict access to a folder to just a one or a number of specific individuals?**'

2. Remove the user from the SharePoint group that has access to the folder if you no longer want them to have access to some or all of the folders within a workspace (depending on which folders the SharePoint group they are in has access to). See '**How do I remove users from SharePoint groups?**' in the 'Managing Users within SharePoint Groups' quick reference guide.

3. Remove a SharePoint group's access to the folder if all of the users in the SharePoint group should not have access to the folder anymore – follow the steps below to do that but rather than removing an individual user remove the group instead.
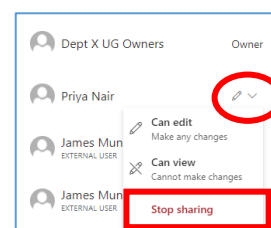

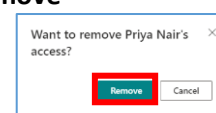To remove an individual's access to a folder they have been given direct access to:

1. Navigate to the location of the folder you wish to remove the individual's direct access to and click on the **three-dot 'Show actions' menu** for the folder

2. Select the '**Manage access**' option
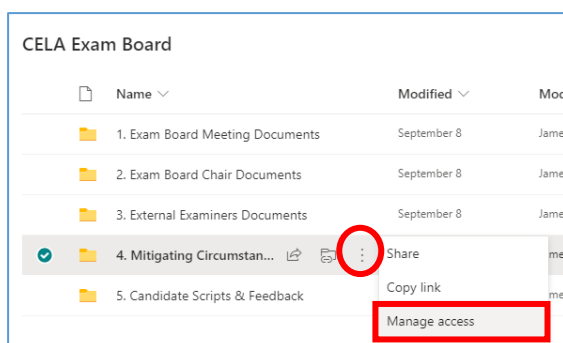
3. Within the 'Manage Access' sidebar identify the user whose access you want to remove, click on the dropdown icon (containing a pencil) to the right of their name and select '**Stop sharing**'

4. Click '**Remove**'

How do I remove an individual's access to all folders that they have been given 'direct access' to within a workspace?

This help topic outlines how to remove an individual's access to all folders – that they have been given 'direct access' to – within a workspace (outside of their membership of any SharePoint groups).

Other options to consider:

If you only want to remove an individual's access to a specific folder within a workspace, see '**How do I remove an individual's access to a folder (if they have been given direct access to it)?**'

To identify the specific files and folders a user has been given direct access to (outside of their membership of any SharePoint groups) see '**How can I see who has access to a folder within a workspace?**'

For how to remove individuals from SharePoint groups see '**How do I remove users from SharePoint group**s?' in the 'Managing Users within SharePoint Groups' quick reference guide.


To remove a user's access from all files or folders that they've been given direct access to within a workspace (NB you can't see 'at a glance' specifically which files and folders those are), complete the following steps:

1. **Click on name of the section of the site in the LH site menu** within which you want to remove a user's access to all of the files and folders they've been given direct access to AND then click on the **Settings 'cog' icon** in the top right hand corner of the site
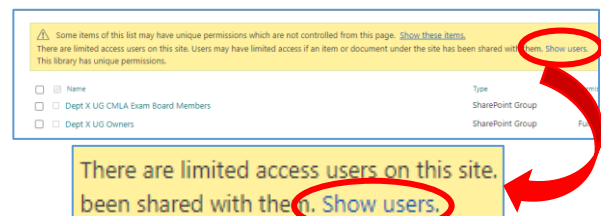
2. Select '**Library settings**' from the list
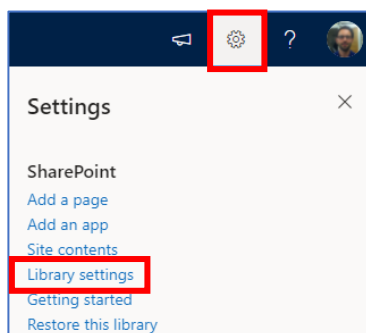
3. Within the workspace '**Settings**' window, click on '**Permissions for this document library**'
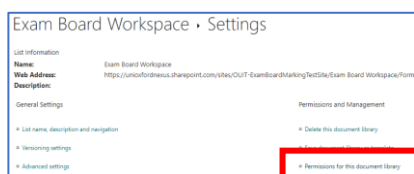
4. In the workspace permissions view, click on 'Show users'
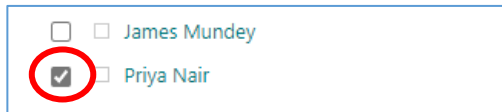

Users who have been given direct access to some of the folders or files within the workspace (outside of SharePoint groups) are then displayed along with the SharePoint groups that have access to the workspace:
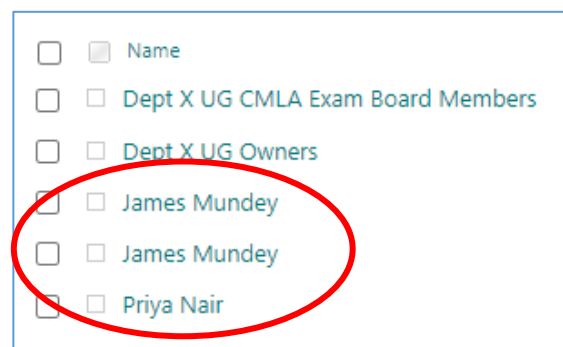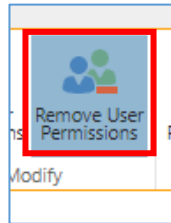

5. To remove a user's access to any folders or files they have been given direct access to in the workspace (outside their membership of a SharePoint group):

a. Tick the checkbox next to their name

b. Click 'Remove User Permissions'

c. Click '**OK**'

unioxfordnexus.sharepoint.com says

You are about to remove all permissions for the following user or group to "CMLA Exam Board":
Priya Nair

OK   Cancel

The user will no longer have access to any folders or files they have been given direct access to in the workspace (outside their membership of any SharePoint groups).

6. *Repeat these steps for any other workspaces within which the user may have been given direct access to folders or files outside of their membership of any SharePoint groups*

Managing Access to Documents / Files

Access to documents is managed in largely the same way as access to folders is managed, except that rather than navigating to the required folder to manage access you need to navigate to the relevant document or file to manage access to it.

How do I restrict access to a document within a site?

See '*How do I restrict access to a folder to just one or a number of specific individuals?*'

Largely the same steps apply to restricting access to a document except that rather than navigating to the required folder to manage access you need to navigate to the relevant document or file to manage access to it.

(NB for obvious reasons the steps in relation to *'Share everything in this folder, even items with unique permissions'* don't apply to the sharing of an individual document).

How do I give an individual access to a document within a site (without changing who already has access to it)?

See '*How do I give one or more specific individuals access to a folder (without changing who already has access to it)?*'

The same steps apply to giving someone access to a document except that rather than navigating to the required folder to manage access you need to navigate to the relevant document or file to manage access to it.

How can I see who has access to a document within a folder?

See '*How can I see who has access to a folder within a workspace?*'

The same steps apply to seeing who has access to a document except that rather than navigating to the required folder to manage access you need to navigate to the relevant document or file to manage access to it.

How do I remove an individual's access to a document (if they have been given direct access to it)?

See '*How do I remove an individual's access to a folder (if they have been given direct access to it)?*'

The same steps apply to removing someone's access to a document (if they have been given direct access to it) except that rather than navigating to the required folder to manage access you need to navigate to the relevant document or file to manage access to it.