How to configure SharePoint permissions with Xoralia

Introduction

When associating a SharePoint library with Xoralia, Xoralia will respect any permissions that have been set in SharePoint: if a user does not have access to a document, Xoralia will never show that document to the user. Similarly, if you would like to make a document assignment to a user in Xoralia, they must already have access to the SharePoint site before they will be able to view the document. Be sure to check out our article about the Xoralia permissions model in conjunction with this article.

Which SharePoint permissions are required?

For a user to be able to see a document in Xoralia, they must have at least Read access to the SharePoint document library.

Assigning permissions is quite straightforward in SharePoint, however they can get more complex the more rules that you enforce across your different libraries. SharePoint typically works on an inheritance model – if you have access to the top level site, you have access to everything therein. However, you can break this inheritance for certain libraries or files. We would normally recommend that you do not break inheritance and that you apply permissions at a site level as management of this can become somewhat cumbersome, although we do recognise that on occasion you may want to break this inheritance and give one library different permissions to another – Xoralia will respect any individual permissions you set up like this.

To assign permissions to an entire SharePoint site, simply navigate to the site homepage, click the SharePoint cog in the top right corner and then click on **Site Permissions**. Then clicking on **Advanced Site Permissions** will display a page that will typically show 3 groups (more may appear here depending upon the changes you've already made to site permissions previously): Owners, Members and Visitors

Visitors: anyone you would like to be able to consume your documents in Xoralia should be a Visitor – Visitors have Read access over your SharePoint site and therefore your SharePoint document libraries associated with Xoralia.

Members: usually people who have edit permissions across your site and libraries – anyone you add here will be able to add, edit and delete documents from your SharePoint site and libraries. Anyone in this group will have Read permission as well.

Owners: the users listed here have all of the permissions above but can also manage permissions and perform more site-wide operations. Should be limited to very few users typically.

To add a user, simply click the group you wish to add a user (or Active Directory group) to, and select **New**. Type your user(s) name in the box that pops up and choose under Show Options if you wish to notify them that you have granted permission. Once you have added the user here, within a few minutes they will have access to your Xoralia libraries that have been associated with this site.

How can I manage multiple users with SharePoint permissions?

SharePoint permissions supports Microsoft Groups and Active Directory security groups by default. We'd recommend that you create groups when assigning permissions in SharePoint. These groups can also be used when making assignments to documents in Xoralia.