

User and Group Permissions

CCS Service Request for Microsoft SharePoint

Crow Canyon Systems, Inc.
<http://www.crowcanyon.com>
<http://www.sharepoint-applications.biz>

Overview

After CCS Service Request for Microsoft SharePoint is installed, permissions and user access must be configured. A good basic understanding of SharePoint permissions is required to make sure that user and group permissions in CCS Service Request system are configured properly.

For reference, here are links to information at Microsoft's site.

SharePoint 2010 permissions:

<http://office.microsoft.com/en-us/windows-sharepoint-services-help/CH010064986.aspx>

Roadmap: Grant Permissions for a Site

<http://office.microsoft.com/en-us/sharepoint-server-help/roadmap-grant-permissions-for-a-site-HA101794118.aspx?CTT=5&origin=HA101943260>

Definitions

Users & Groups – individual users or groups that are assigned permissions

Permissions Levels – levels of rights that users and groups have to objects

Securable Objects (Sites, Lists, Libraries, Workspaces) – the objects that are users and groups are given specific access (permission levels) to.

Site Collection Administrator

During installation of CCS Service Request for SharePoint, the account that is used for installation (usually an Administrator-level account) is designated the primary Site Collection Administrator. This Administrator has full rights to the Site Collection, even if not specifically granted permissions in the individual sites, lists, etc.

This Site Collection Administrator can be changed and a secondary one can be added, after installation. More information on the Site Collection Administrator is available at:

<http://office.microsoft.com/en-us/sharepoint-server-help/permissions-for-site-collection-administrators-HA101943260.aspx>

Groups created during Installation

The CCS Service Request for SharePoint installation creates three groups. No accounts are added to these groups during installation. After installation, these groups can be used or deleted as needed and new groups can be created; users can be added to any of the groups, as appropriate. Also, the groups' permission levels on the various permission objects (sites, lists, libraries, etc.) can be modified.

These groups are created during installation:

Owners – (Administrator level). Full Control over every Site, List and Library. One or more people who are the administrator(s) for the service request and who can make modifications and changes to permissions, lists and libraries in all areas.

Members – (Staff level). Contribute permission. Staff who work in the Service Request system. They can view, add, update, and delete items in lists, such as tickets.

Visitors – (User/Employee level). Read permission. Usually the end users or employees.

Understanding Staff and User permissions

In the CCS Service Request system, different people have different roles; the permissions need to be set accordingly. For this discussion, "Staff" means the personnel who will be working on tickets – not only creating them, but also modifying, adding to log, assigning, changing status and priority, completing tickets, and many other such functions. "Users" are people (usually the rest of the employees) who will only create and view tickets.

How the Staff is given permissions depends on the situation at the company. If multiple Service Areas are setup (such as IT Help Desk, HR, Facilities, Customer Service, etc.), Staff can be one group that has the same access to all of these sites or Staff can be broken down into groups for different permissions on the different areas. If staff personnel use only certain sites (or just one), they need different permissions on each site. In that case, there would be, for example, a "Staff IT" group and a "Staff HR" group with different members and different permissions to the two sites.

Alternatively, there could be one Staff group that has the same access to all the sites. And there could be both – some staff with permissions to all the sites and some with permission to just one site. This is where it takes some planning on how the CCS Service Request will be used so that the proper permission regime can be configured.

For Users, the same principles apply. Do all users have rights to create tickets in all the areas? Or are there different users in different areas? Most commonly, the users are employees and they may need to create a ticket in any of the sites, so therefore need equal access to all the sites.

In some cases, there may be no "Users" per se. There is only staff, because users do not create tickets directly in the system; all tickets are created by staff and there is no need to use the Visitors group.

The groups that are set up for both Staff and Users, and the permissions that are granted, will depend on how the CCS Service Request system is intended to be used in the organization.

Permission Levels

Default permission levels

Permission levels are collections of permissions that allow users to perform a set of related tasks. SharePoint Server 2010 includes five permission levels by default. You can customize the permissions available in these permission levels (except for the Limited Access and Full Control permission levels), or you can create customized permission levels that contain only the specific permissions you need.

For more information about default permission levels, see “**User permissions and permission levels (SharePoint Server 2010)**” at: <http://technet.microsoft.com/en-us/library/cc721640.aspx>

SharePoint has these five default Permission Levels

Full Control: Has full control.

Design: Can view, add, update, delete, approve, and customize.

Contribute: Can view, add, update, and delete.

Read: Can view only.

Limited Access: Can view specific lists, document libraries, list items, folders, or documents when given permissions.

Custom Permission Levels – custom permission levels can be created that further refine what rights a user or group has to a site, list, library, or other object in SharePoint. For example, you might want to create a permission level that allows staff to Add, View, and Edit, but not Delete, items in lists. For Employees (users), you may want to have them Add and View Items in a list, but not edit or delete them.

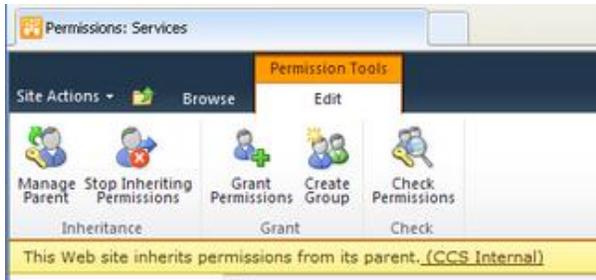
User Access permission level - CCS Service Request requires one custom Permission Level for Visitors (Employees) to access the Tickets list with Add Items and View Items, but not Edit or Delete (unless you want to allow Employees to edit or delete items in that list). This is a copy of the Contribute permission level with the “Edit Items” and “Delete Items” boxes unchecked.

For more information about how to customize permission levels, see “**Configure custom permissions (SharePoint Server 2010)**” at <http://technet.microsoft.com/en-us/library/cc263239.aspx>

Permission Inheritance

When a site, list, library, etc., is created, it inherits the Permissions and Permission Levels of the parent object. If it needs its own permissions, the permission inheritance must be turned off. Permissions and Permission Levels can then be configured for that object.

Example of Site where it inherits permissions (go to Site Actions/Site Permissions when in the site). Use “Stop Inheriting Permissions” to break the inheritance and enable the site to have its own permissions:



Example of Site (Site Actions/Site Permissions when in the site) where it does not inherit permissions:



For Lists and Libraries, use List Settings (or Library Settings), and then List Permissions (or Library Permissions) to set up the permissions.

For more information on permission planning and inheritance, see “Plan site permissions (SharePoint Server 2010)” at: <http://technet.microsoft.com/en-us/library/cc262778.aspx>

Object-Group-Permission Level Settings

As per the tables below, in CCS Service Request, certain sites, lists and libraries can be given their own permission regime so as to manage staff and user access.

Main Site (Root Site)

GROUP	PERMISSION LEVEL
Owners	Full Control
Members	Contribute
Visitors	Read

Each Service Area Site

GROUP	PERMISSION LEVEL
Owners	Full Control
Members	Contribute
Visitors	Limited Access *

* “Limited Access” is not explicitly granted, but is given automatically when the Group is given permissions on a list or library in the Site.

“Tickets” list in Service Area Site

GROUP	PERMISSION LEVEL
Owners	Full Control
Members	Contribute
Visitors	User Access *

* “User Access” is a custom Permission Level (described above)

“Workspaces” document library, “Service Satisfaction Survey”, “SLA Definition”, “SLA Implementation”, “Category”, “Issue Type”, “Email Tickets”, and “New Ticket Utility”.

GROUP	PERMISSION LEVEL
Owners	Full Control
Members	Contribute
Visitors	Read

“Script Documents” document library list in Service Area Site

GROUP	PERMISSION LEVEL
Owners	Full Control
Members	Read
Visitors	Read

Other Lists and Libraries in the Service Area Site are not given their own permissions and therefore inherit the permission from the Service Area Site.

Assets or Equipment Site

GROUP	PERMISSION LEVEL
Owners	Full Control
Members	Contribute
Visitors	Read

Further Configuration of Tickets list in each Service Area

The “Tickets” form contains tabs that need permissions set on them. In List Settings under Permissions and Management, click “Tabs and tabs permissions”. The “Tab Settings” page comes up. For any tab that Staff should see, but not Visitors/Employees, set the permissions so that Owners and Members can Write, but Visitors cannot (Deny).

To Add New Permission Rule, set the Permission Level to Read, Write, or Deny (Hidden). Set it to apply in all forms – New Item, Edit Existing Item, and View Existing Item. Choose the Group, and then press the

“Add New Permission Rule” bar. This will add it to the Current Permission Rules.

Permissions

Permission level: Read Write Deny (hidden)

Apply in forms: New item
 Edit existing item
 View existing item

For users\groups:   Default

Conditions

Add New Permission Rule

Current permission rules

Permission level	User\Group	Default	Forms	Conditions
Write	Trial 3 Housing Staff	No	All	Delete Edit
Write	Team Site Owners	No	All	Delete Edit
Write	Trial 3 Admins	No	All	Delete Edit
Deny (hidden)	Trial 3 Users	No	All	Delete Edit
Write	Trial 3 Staff	No	All	Delete Edit

General Settings

Display as groups
 Hide empty tabs
 Display All Columns tab

Title:

Developed by [Infowise Ltd](#)