SharePoint Online
Quick Reference Guide

UNIVERSITY OF
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Using Groups in SharePoint Online

What does this guide cover?	How to use Groups with SharePoint Online, and the advantages and disadvantages of each type of group
Who is it aimed at?	Site Owners and Site Network Administrators

Introduction

This document covers the use of groups in SharePoint Online. Groups are key to organising your site users, ensuring they have access to the parts of the site they need to access. This document also briefly mentions the permissions groups in SharePoint Online but essentially there are three types of Group that can be used in SPO:

1. **SharePoint Groups** - managed by the site owner / site administrator from the SharePoint Online site itself. There are three pre-built groups:
    1) Site Owners, with owner rights
    2) Site Members, with read/edit rights
    3) Site Visitors, with read-only rights
2. **Office365 Groups** - these are used throughout Nexus365 for various purposes. Groups are created alongside Microsoft Teams but groups can also be requested independently by users for other purposes, such as sharing a group calendar, or creating an Office365 Mail Distribution List
3. **Pre-Populated Unit Level Groups** - these are populated by affiliation when someone joins a unit. Their status (Cardholder, Staff, Student, SENMEM) will determine which of the Unit-Level groups they are joined to. Though you cannot see the members of these groups nor control their memberships from within SharePoint Online, you can add them to any of your SharePoint Groups to pick up the permissions that group has within your site

Advantages and Disadvantages of each type of group

SharePoint Groups

Advantages

- Easy to administer and maintain within your SharePoint Online site
- All members can be seen along with their profile details
- Site Owners can take ownership of the groups, and can be emailed automatically if someone is requesting access to a site
- Useful in situations where you prefer to add individuals to permission groups rather than large collections of users
- They work in exactly the same way that they did in SharePoint on-premise, so experienced SharePoint users will know how to use them straight away

Disadvantages

- SharePoint Groups can only be used within SharePoint Online, not in any other parts of the Nexus365 Service
- SharePoint Groups cannot be referred to, or used in Power Automate (Flow) actions without workarounds
- Administering lots of groups within a single site can quickly become frustrating and annoying for site owners / site administrators so use them wisely

Office365 Groups

Advantages
- Already widely used across the Nexus365 Service through Microsoft Teams
- Can be interacted with or used in Power Automate Actions
- Can be used within Outlook / Outlook on the Web (OWA)
- They come with a Group Calendar with more functionality and usability than a standard SharePoint Calendar
- They're a great way of integrating your unit's pre-existing Microsoft teams with SharePoint Online

Disadvantages
- Can be confusing to administer: for example, you have a choice of adding or removing members through Teams, Outlook or OWA
- Members cannot be seen in SharePoint Online, nor controlled through SharePoint Online

Pre-populated Unit-Level Groups

Advantages
- A quick way to grant access to your SharePoint Online site for large numbers of users with specific affiliations, for example, to add all staff or students in your unit to your site very quickly
- Affiliation and membership of the groups is handled automatically, usually when new members join the organisation
- Memberships are revoked automatically alongside their account wind-down / closure

Disadvantages
- Memberships of the groups cannot be seen nor controlled directly from SharePoint Online itself
- Memberships sometimes take a while to take effect once an affiliate is added to the group (usually by your unit's HR / Student Administration departments) so they're not great for granting instant access to sites (you may still have to add the individual users to your SharePoint groups in the interim)
- No direct link with the SharePoint Service / Nexus Team so no direct line of support from us if you use these in your site and the user does not get the access they expected

Further recommendations when considering the use of Groups in SharePoint Online

Groups can vastly improve the user experience when administering sites but please consider the following additional points:

- SharePoint Online is based around provision of a 'flat' structure for your sites. This means that we encourage you not to create subsites, nor create vastly complex permissions schemas in your sites. Consider creating sites with specific purposes for specific subsets of your users. For example, don't try to break a single site up into staff and student areas, consider setting up separate sites for each, with use of the above groups in order to make administration easier
- Avoid the use of single level permissions in your sites when assigning groups. For example, don't share an individual file or folder with a group, think about the structure of your site and how you can collect commonly accessed materials together in one place where you can set permissions at the 'parent' level, that is, at the document LIBRARY not the Library's folders or files
- Make note of the advantages and disadvantages above and consider them when building your site structures, particularly if you opt to use Unit-Level groups. The Nexus Team will not be able to directly assist nor resolve any OSM Tickets around lack of access for users in those groups. The control and memberships of O365 groups are entirely down to the group owners, and the control and memberships of Unit-level groups are governed entirely by affiliation.