SharePoint Permission Groups Setup Checklist

1. Planning & Strategy

- Identify key stakeholders and their roles.
- Decide which documents or sites need restricted access.
- Map default SharePoint groups vs. custom groups.
- Define approval chains and workflow requirements.

2. Creating Groups & Permissions

- Review existing permission groups.
- Create custom permissions for specific tasks.
- Assign clear names and descriptions to each group.
- Test permission levels using a sample account.
- Document all group assignments and roles.

3. Workflow & Approvals

- Set up parallel vs. sequential approval processes as needed.
- Configure timeout actions to prevent stalled workflows.
- Customize approval email templates with clear instructions.
- Integrate groups into document libraries.
- Use access management rules to control escalations.

4. Security & Governance

- Apply security groups for overarching access.
- Review and clean up inactive or redundant groups.
- Audit all permission assignments quarterly.
- Ensure sensitive data is only accessible to required roles.
- Keep a centralized document of all rules and changes.

5. Troubleshooting & Maintenance

- Check effective permissions for users reporting issues.
- Resolve conflicts by simplifying overlapping groups.
- Test access with a separate account to confirm changes.
- Monitor workflows for frequent timeouts or escalations.
- Update and refine custom permissions as roles evolve.