

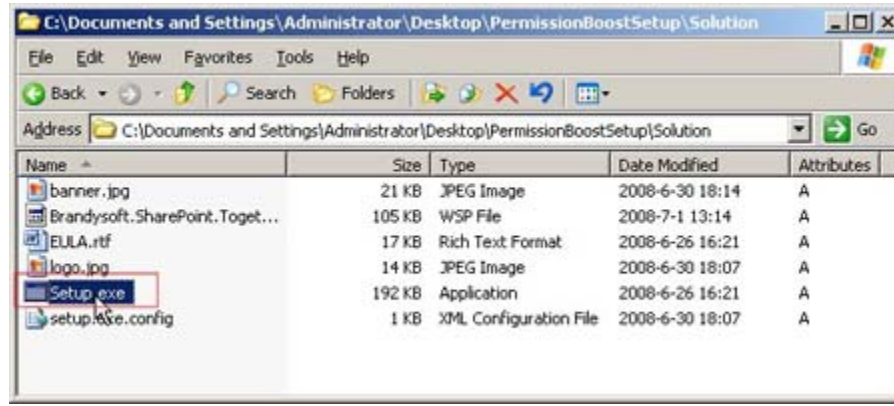
SharePoint Column Permission Installation Instruction

System Requirements

Microsoft Windows SharePoint Services v3 or Microsoft Office SharePoint Server 2007.

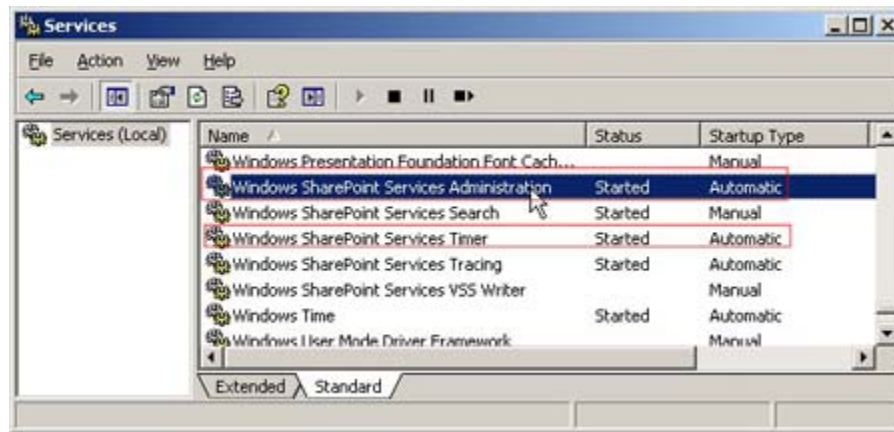
Install

Download SharePoint Column Permission install file from SharePointBoost website, release the file, and run "setup.exe".



Note:

You must be the SharePoint Farm Administrator.



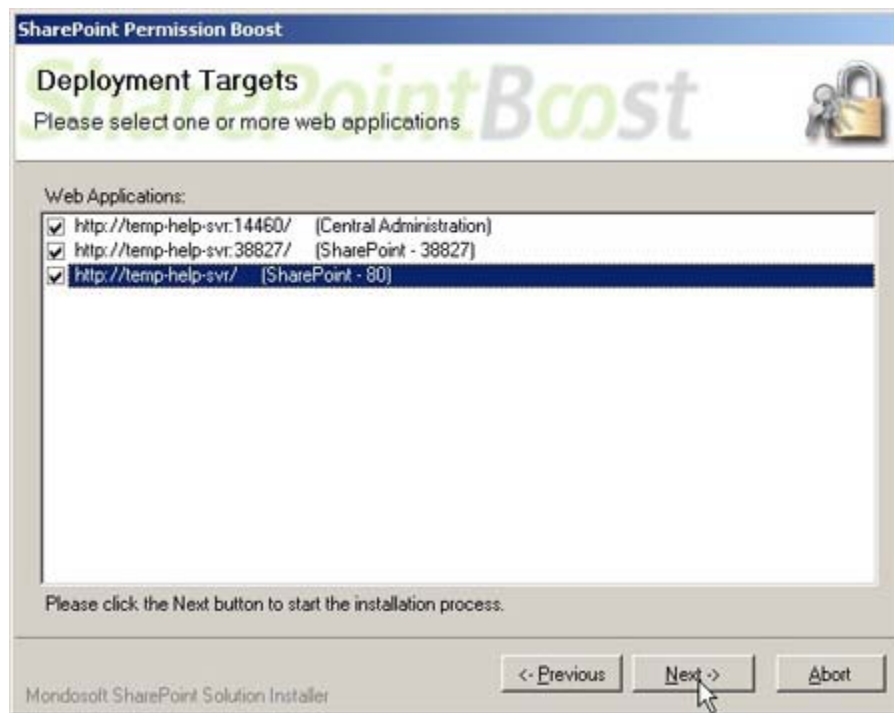
After system check is finished, click "Next".



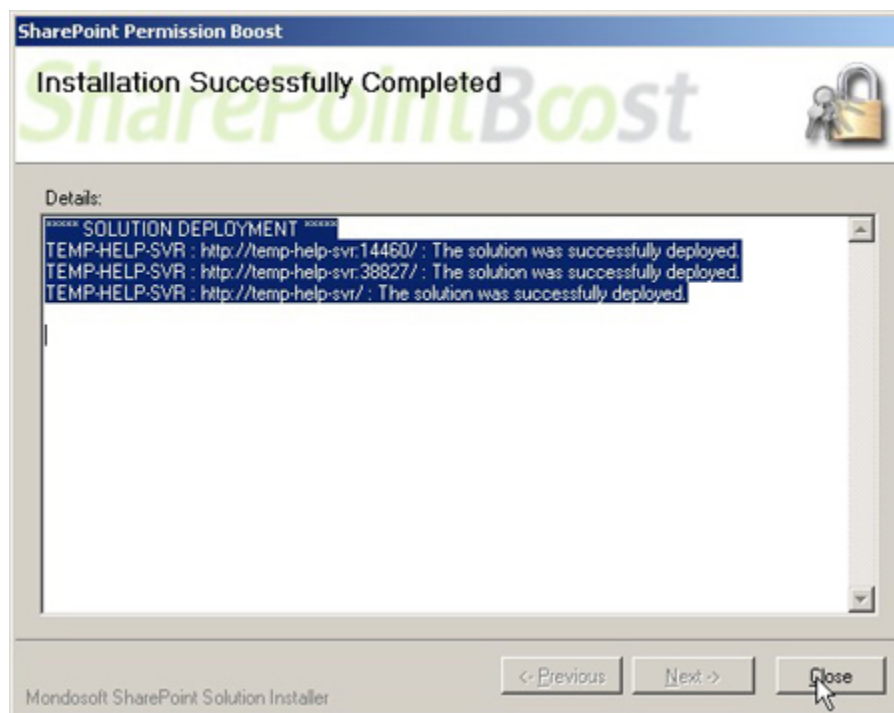
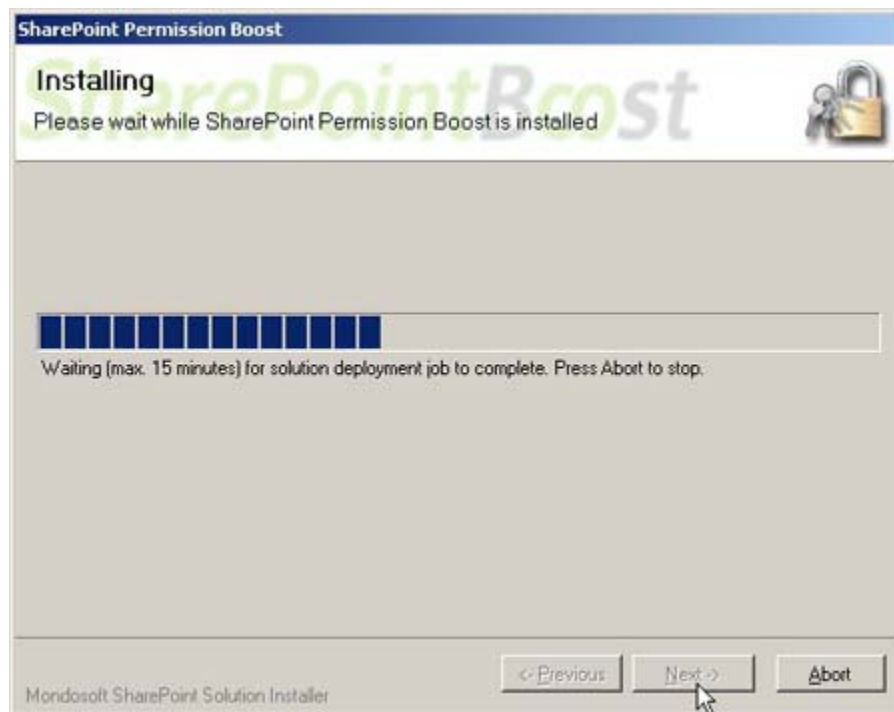
After reading License Agreement, click "accept" and go to next step.



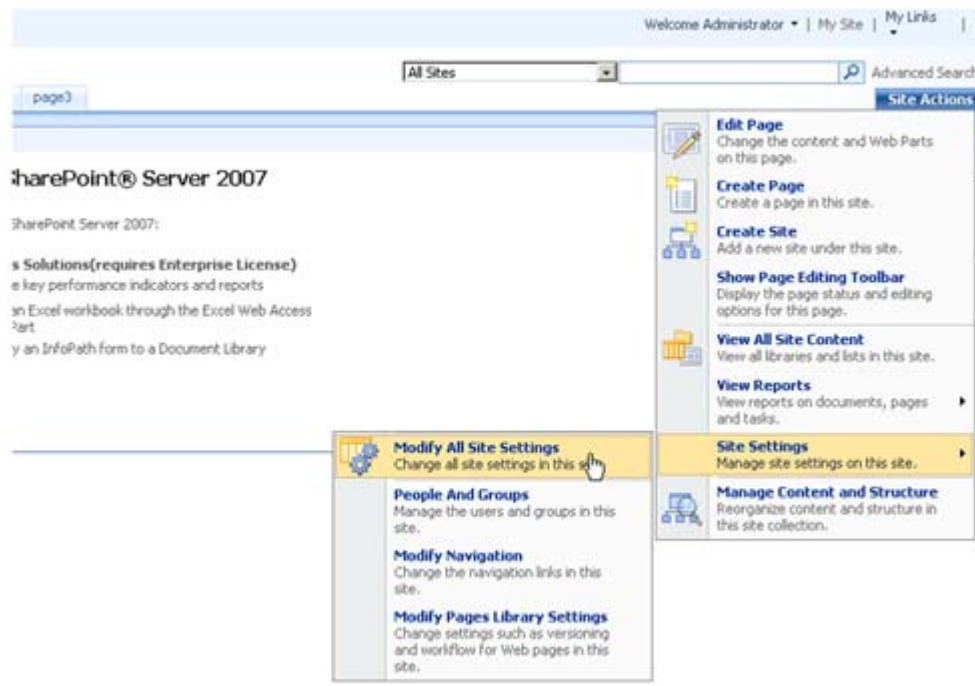
Select one or more web applications and click "Next".



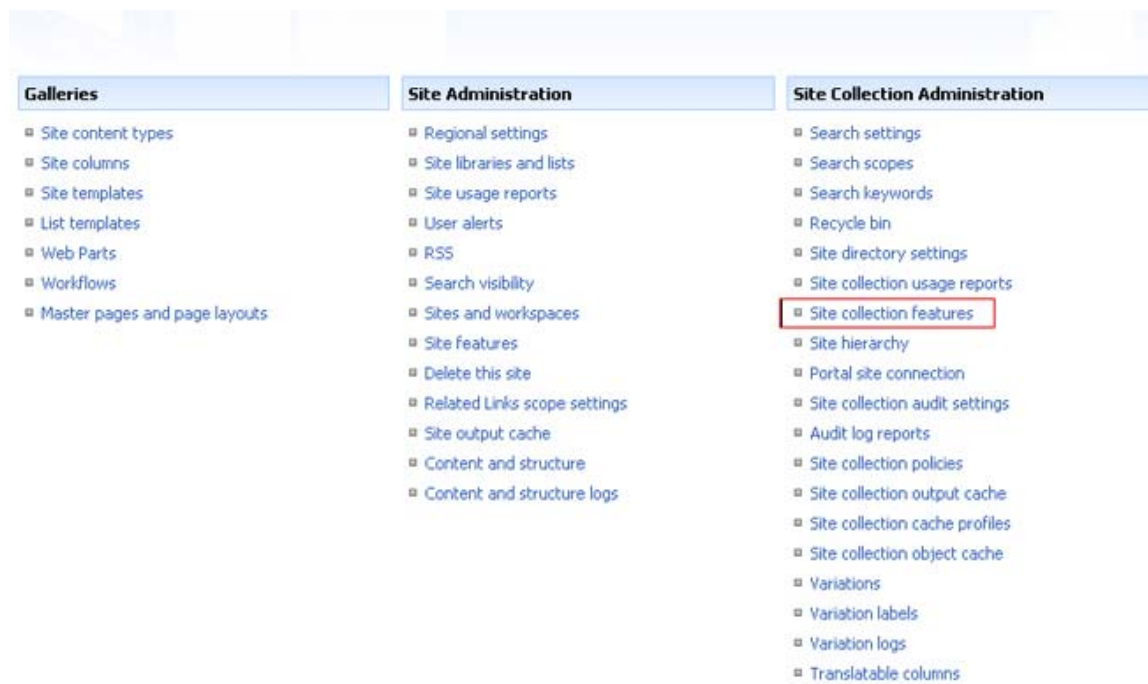
Wait for installing, click “Next” for more deployment details.



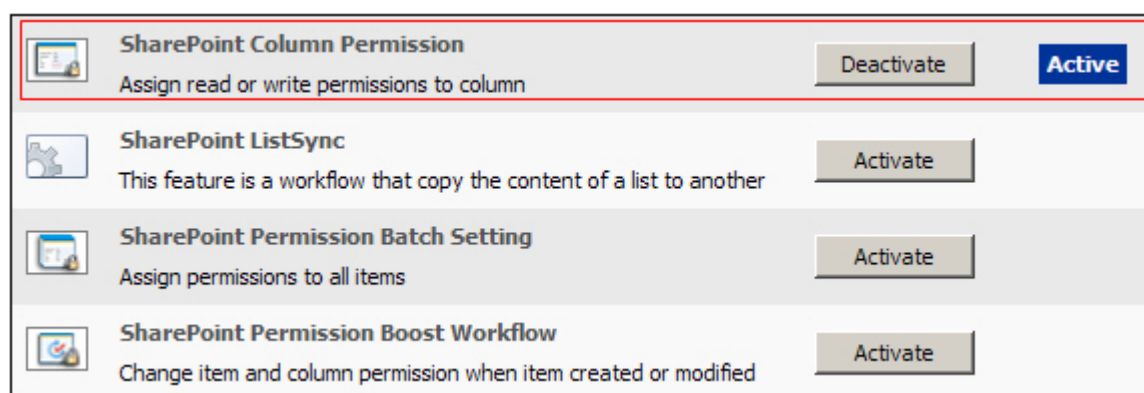
Choose Site Actions dropdown menu, click “Modify All Site Settings”, and enter Site Settings page.



Select "Site Collection Features".



In SharePoint Site collection feature list, activate SharePoint Column Permission.

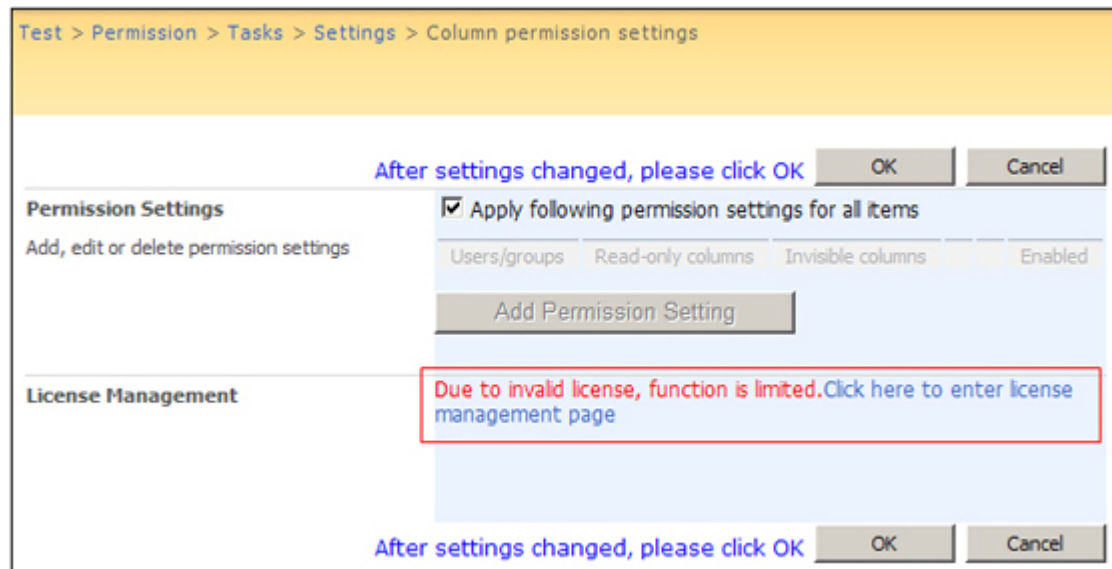


After installation, you can find Column permission settings link in every list workflow setting page.

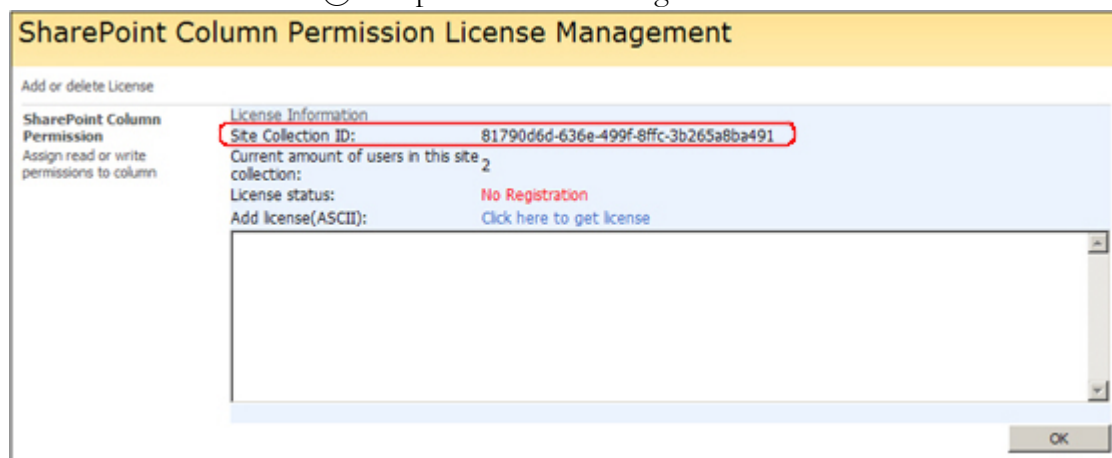


License Management

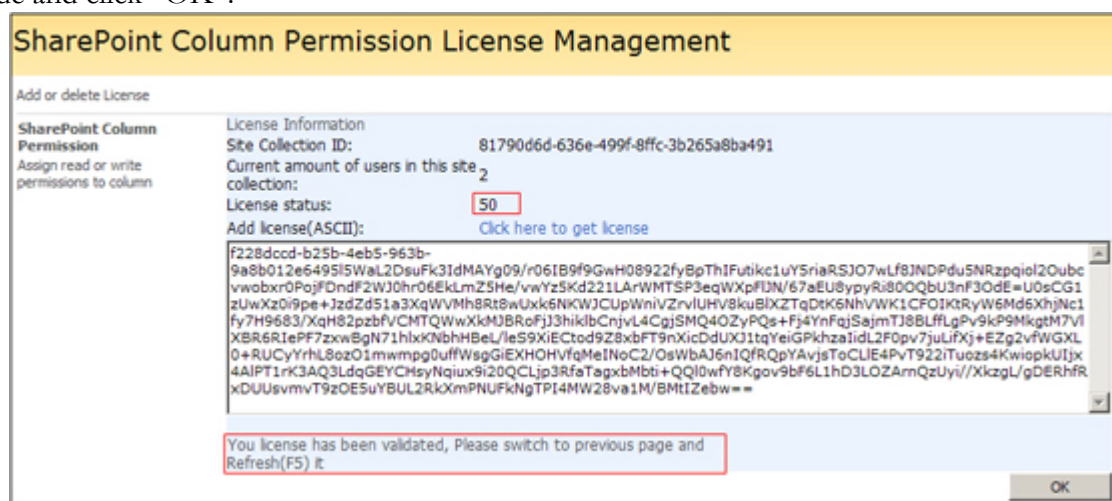
Click link in Column Permission setting page to visit Column Permission license management page.



After payment, send site collection ID to sales@sharepointboost.com to generate license code.

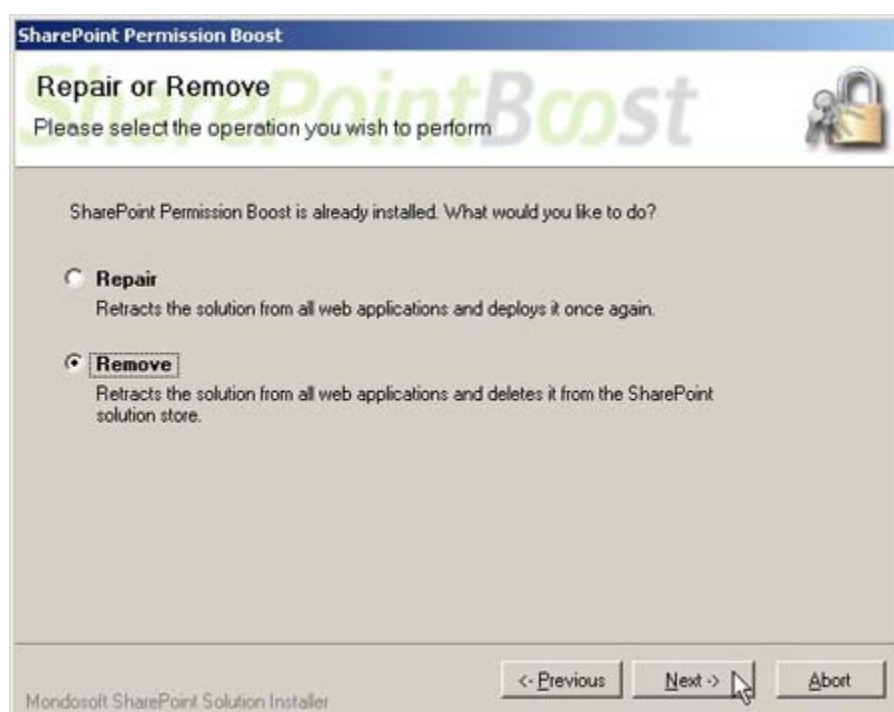


Enter the license code and click "OK".



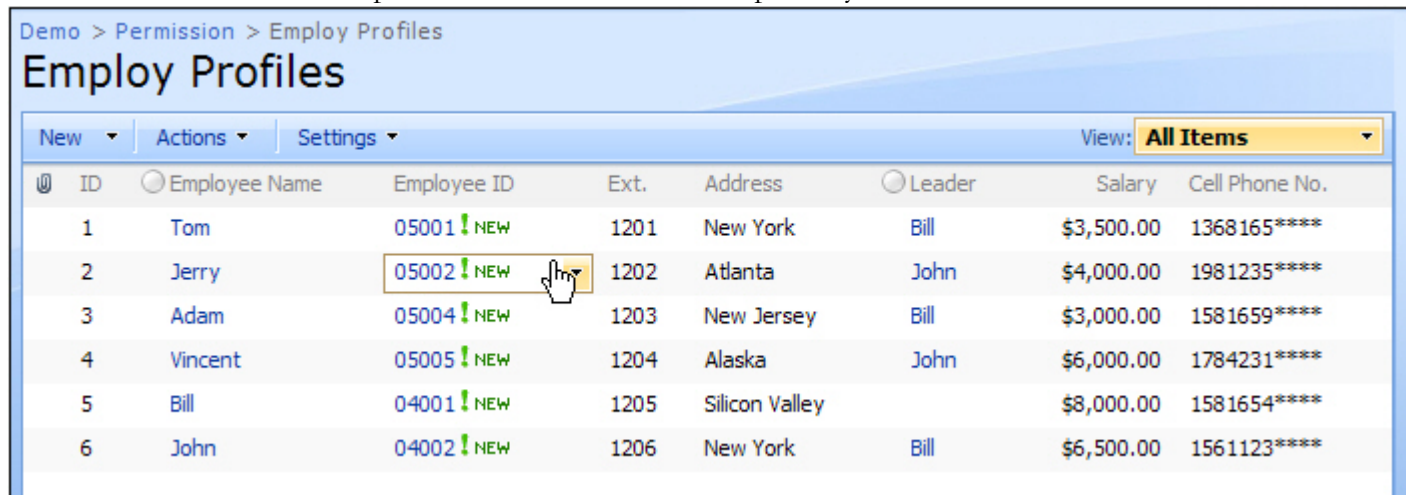
Uninstall

Run "setup.exe" again. (If your install file has been deleted, you can download it from http://www.sharepointboost.com). In the Repair and Remove page, select the Remove radio button and click "Next", the Column Permission Boost will be uninstalled.



SharePoint Column Permission Tutorials

SharePoint Column Permission can make column invisible or read-only to certain people. For instance, there is a list contained employee profiles. Everyone can view the basic information like name and ID. However, only the accountant can access to salary column, while administration staff has permission to all columns except salary column.



Demo > Permission > Employ Profiles

Employ Profiles

New Actions Settings View: All Items

ID	Employee Name	Employee ID	Ext.	Address	Leader	Salary	Cell Phone No.
1	Tom	05001 !NEW	1201	New York	Bill	\$3,500.00	1368165****
2	Jerry	05002 !NEW	1202	Atlanta	John	\$4,000.00	1981235****
3	Adam	05004 !NEW	1203	New Jersey	Bill	\$3,000.00	1581659****
4	Vincent	05005 !NEW	1204	Alaska	John	\$6,000.00	1784231****
5	Bill	04001 !NEW	1205	Silicon Valley		\$8,000.00	1581654****
6	John	04002 !NEW	1206	New York	Bill	\$6,500.00	1561123****

Invisible Column

There are three view types: Public View, Accountant View, and Administration View. One staff, without permission to a column belonging to a certain kind of view, cannot access to this kind of view also.



Demo > Permission > Employ Profiles > Settings > Edit View

Edit View: Employ Profiles

To customize this view further, use a Web page editor compatible with Windows SharePoint Services.

Delete OK Cancel

Name

Type a name for this view of the list. Make the name descriptive, such as "Sorted by Author", so that site visitors will know what to expect when they click this link.

View Name:

Web address of this view: <http://220.207.177.199/sites/demo/Permission/Lists/Employ Profiles/Public View.aspx>

Make this the default view (Applies to public views only)

Columns

Select or clear the check box next to each column you want to show or hide in this view. To specify the order of the columns, select a number in the **Position from left** box.

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Attachments	1
<input checked="" type="checkbox"/>	ID	2
<input checked="" type="checkbox"/>	Employee Name	3
<input checked="" type="checkbox"/>	Employee ID (linked to item with edit menu)	4
<input checked="" type="checkbox"/>	Ext.	5
<input type="checkbox"/>	Address	6
<input type="checkbox"/>	Cell Phone No.	7

Demo > Permission > Employ Profiles > Settings > Edit View

Edit View: Employ Profiles

To customize this view further, use a Web page editor compatible with Windows SharePoint Services.

Delete OK Cancel

Name

Type a name for this view of the list. Make the name descriptive, such as "Sorted by Author", so that site visitors will know what to expect when they click this link.

View Name:

Web address of this view: <http://220.207.177.199/sites/demo/Permission/Lists/Employ Profiles/Accountant View.aspx>

Make this the default view (Applies to public views only)

Columns

Select or clear the check box next to each column you want to show or hide in this view. To specify the order of the columns, select a number in the **Position from left** box.

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Attachments	1
<input checked="" type="checkbox"/>	ID	2
<input checked="" type="checkbox"/>	Employee Name	3
<input checked="" type="checkbox"/>	Employee ID (linked to item with edit menu)	4
<input checked="" type="checkbox"/>	Ext.	5
<input checked="" type="checkbox"/>	Salary	6
<input type="checkbox"/>	Address	7
<input type="checkbox"/>	Cell Phone No.	8

Demo > Permission > Employ Profiles > Settings > Edit View

Edit View: Employ Profiles

To customize this view further, use a Web page editor compatible with Windows SharePoint Services.

Delete OK Cancel

Name

Type a name for this view of the list. Make the name descriptive, such as "Sorted by Author", so that site visitors will know what to expect when they click this link.

View Name:

Web address of this view: <http://220.207.177.199/sites/demo/Permission/Lists/Employ Profiles/Administration View.aspx>

Make this the default view (Applies to public views only)

Columns

Select or clear the check box next to each column you want to show or hide in this view. To specify the order of the columns, select a number in the **Position from left** box.

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Attachments	1
<input checked="" type="checkbox"/>	ID	2
<input checked="" type="checkbox"/>	Employee Name	3
<input checked="" type="checkbox"/>	Employee ID (linked to item with edit menu)	4
<input checked="" type="checkbox"/>	Ext.	5
<input checked="" type="checkbox"/>	Address	6
<input checked="" type="checkbox"/>	Leader	7
<input checked="" type="checkbox"/>	Cell Phone No.	8

In list setting page, click "Column permission setting" and enter column setting page.

Demo > Permission > Employ Profiles > Settings

Customize Employ Profiles

List Information
 Name: Employ Profiles
 Web Address: http://220.207.177.199/sites/demo/Permission/Lists/Employ Profiles/AllItems.aspx
 Description:

General Settings	Permissions and Management	Communications
<ul style="list-style-type: none"> Title, description and navigation Versioning settings Advanced settings Audience targeting settings 	<ul style="list-style-type: none"> Delete this list Save list as template Permissions for this list Workflow settings Information management policy settings Column permission settings (Powered by SharePointBoost) Permission batch settings (Powered by SharePointBoost) 	<ul style="list-style-type: none"> RSS settings

The following is an example of giving ordinary staff like Tom column permissions. Add his name in “users/groups” editor box. Select "Address", "Cell Phone No.", "Salary", and "Leader" column, and move to the right box. These columns are read-only to Tom.

Users or Groups
 The permissions of these users or groups will be modified.

Input users/groups

Tom

Column Permissions
 Please choose invisible columns or read-only columns to these users or groups. Notice that if some list view contains selected invisible columns, the list view will also be invisible to these users or groups, and if the list view contains selected read-only columns, the view can not be edited in datasheet or MS Access by these users or groups (menu items in Actions menu will be hidden).

Choose read-only columns

Address
 Cell Phone No.
 Employee ID
 Employee Name
 Ext.
 Leader
 Salary

Add >

< Remove

Choose invisible columns

Employee ID
 Employee Name
 Ext.

Add >

< Remove

Address
 Cell Phone No.
 Leader
 Salary

Setting permission to accountant is similar to ordinary staff. Jerry is an accountant accessing to salary column.

Users or Groups
The permissions of these users or groups will be modified.

Input users/groups

Jerry

Column Permissions
Please choose invisible columns or read-only columns to these users or groups. Notice that if some list view contains selected invisible columns, the list view will also be invisible to these users or groups, and if the list view contains selected read-only columns, the view can not be edited in datasheet or MS Access by these users or groups (menu items in Actions menu will be hidden).

Choose read-only columns

Address
Cell Phone No.
Employee ID
Employee Name
Ext.
Leader
Salary

Add >

< Remove

Choose invisible columns

Employee ID
Employee Name
Ext.
Salary

Add >

< Remove

Address
Cell Phone No.
Leader

Give Henry, an administration staff, corresponding permission.

Users or Groups
The permissions of these users or groups will be modified.

Input users/groups

Henry

Column Permissions
Please choose invisible columns or read-only columns to these users or groups. Notice that if some list view contains selected invisible columns, the list view will also be invisible to these users or groups, and if the list view contains selected read-only columns, the view can not be edited in datasheet or MS Access by these users or groups (menu items in Actions menu will be hidden).

Choose read-only columns

Address
Cell Phone No.
Employee ID
Employee Name
Ext.
Leader
Salary

Add >

< Remove

Choose invisible columns

Address
Cell Phone No.
Employee ID
Employee Name
Ext.
Leader

Add >

< Remove

Salary

Now, Tom can only choose "Public View", Jerry can access to "Public View" and "Accountant View", while Henry can view items in "Public View" and "Administration View"

In display form, Tom cannot see "Leader", "Address", "Cell Phone No." and "Salary" column.

Welcome Tom | My Site | My Links

This Site: Permission

Demo > Permission > Employ Profiles > 05002

Employ Profiles: 05002

Close

New Item | Edit Item | Delete Item | Workflows | Alert Me

Employee Name	Jerry
Employee ID	05002
Ext.	1202
Leader	
Address	
Cell Phone No.	
Salary	

Created at 7/23/2008 3:22 PM by Administrator
Last modified at 7/23/2008 4:27 PM by Administrator

Close

Read-only Column

The information in employee profiles is input by different departments with corresponding permissions.

For instance, Jerry, an accountant, can only edit the salary column of each employee. Enter the accountant setting page. Choose and move all columns but "Salary" to the right box which means read-only columns.

Users or Groups
The permissions of these users or groups will be modified.

Input users/groups

Jerry

Column Permissions
Please choose invisible columns or read-only columns to these users or groups. Notice that if some list view contains selected invisible columns, the list view will also be invisible to these users or groups, and if the list view contains selected read-only columns, the view can not be edited in datasheet or MS Access by these users or groups (menu items in Actions menu will be hidden).

Choose read-only columns

Salary

Add >

< Remove

Address
Cell Phone No.
Employee ID
Employee Name
Ext.
Leader

Choose invisible columns

Employee ID
Employee Name
Ext.
Salary

Add >

< Remove

Address
Cell Phone No.
Leader

In Edit form, Jerry can only edit salary column.

Welcome Jerry | My Site | My Links

This Site: Permission

Demo > Permission > Employ Profiles > 05002 > Edit Item

Employ Profiles: 05002

OK Cancel

Attach File | Delete Item | Spelling... * indicates a required field

Employee Name *	Jerry	← Read-only Columns
Employee ID *	05002	
Ext.	1202	
Leader		← Invisible Columns
Address		
Cell Phone No.		
Salary	4,000.00	

Created at 7/23/2008 3:22 PM by Administrator
Last modified at 7/23/2008 4:27 PM by Administrator

OK Cancel

If current view contains read-only column, the "Edit in Datasheet" menu item in Action menu will be hidden to avoid editing read-only columns.

Welcome Jerry | My Site | My Links

This List: Employ Profiles

Demo > Permission > Employ Profiles

Employ Profiles

View: Accountant View

Actions

- Export to Spreadsheet: Analyze items with a spreadsheet application.
- View RSS Feed: Syndicate items with an RSS reader.
- Alert Me: Receive e-mail notifications when items change.

Be hidden from Actions Menu

ID	Employee ID	Ext.	Salary
1	01 ! NEW	1201	\$3,500.00
2	02 ! NEW	1202	\$4,000.00
3	04 ! NEW	1203	\$3,000.00
4	05 ! NEW	1204	\$6,000.00
5	01 ! NEW	1205	\$8,000.00
6	John 04002 ! NEW	1206	\$6,500.00

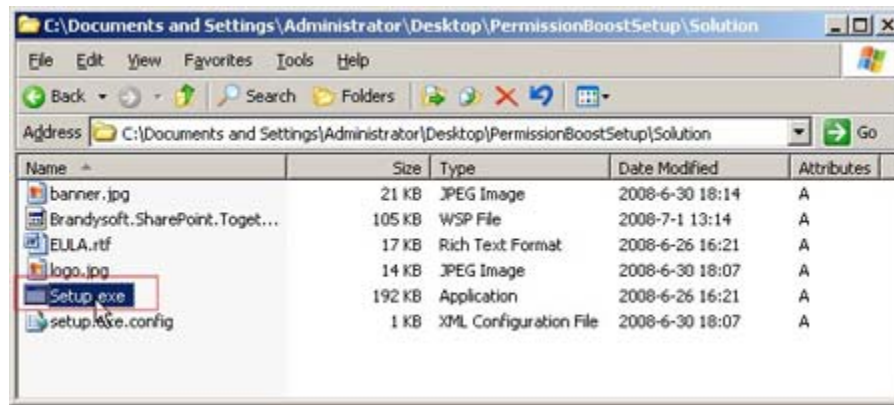
SharePoint Permission Batch Setting Installation Instruction

System Requirements

Microsoft Windows SharePoint Services v3 or Microsoft Office SharePoint Server 2007.

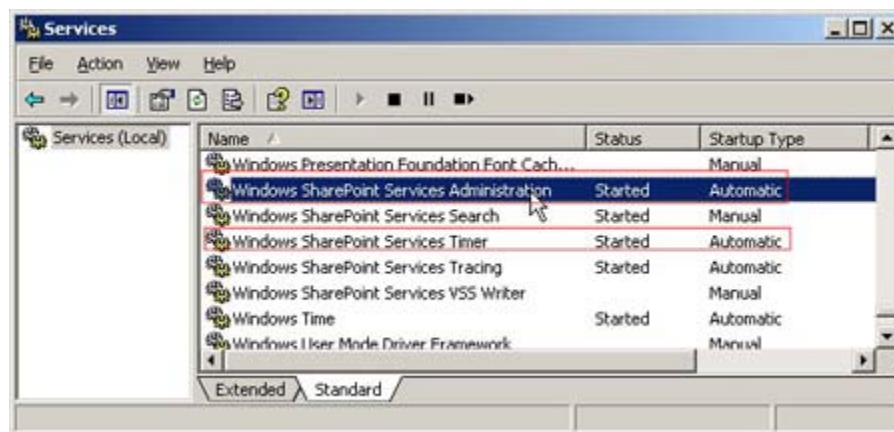
Install

Download SharePoint Permission Batch Setting install file from SharePointBoost website, release the file, and run "setup.exe".

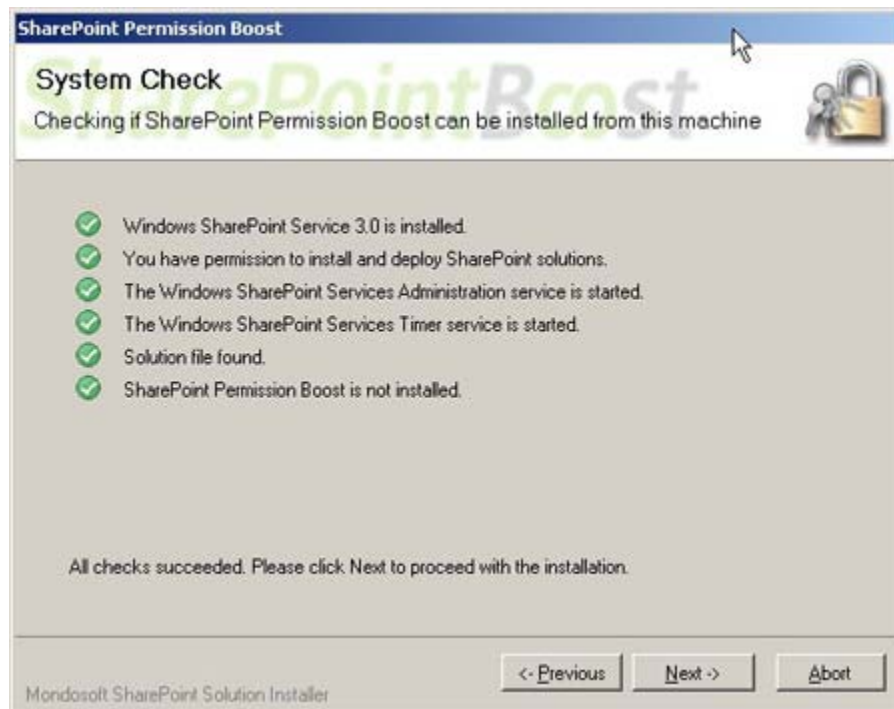


Note:

You must be the SharePoint Farm Administrator.



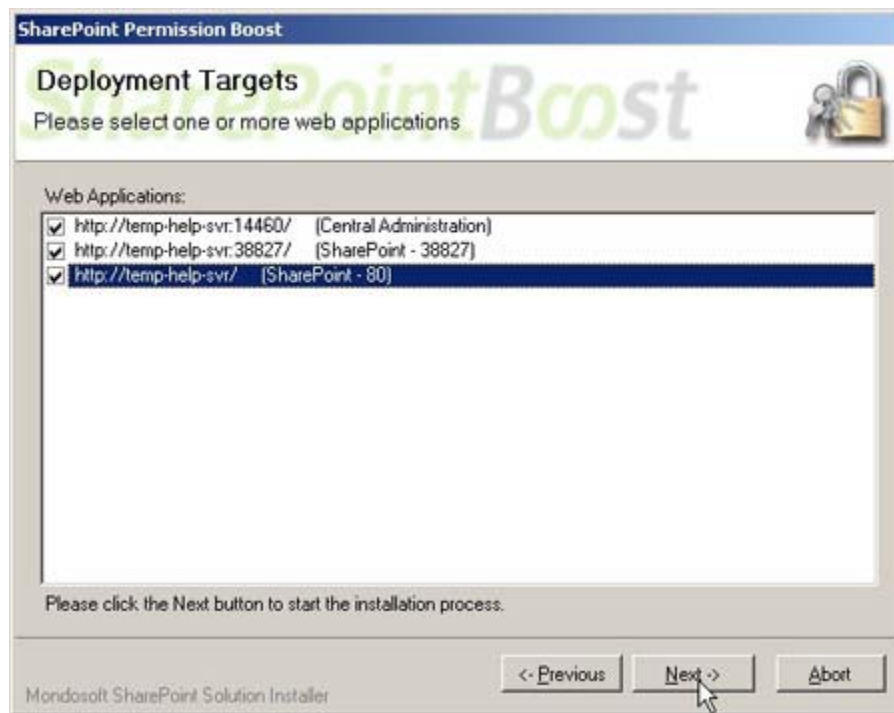
After system check is finished, click "Next".



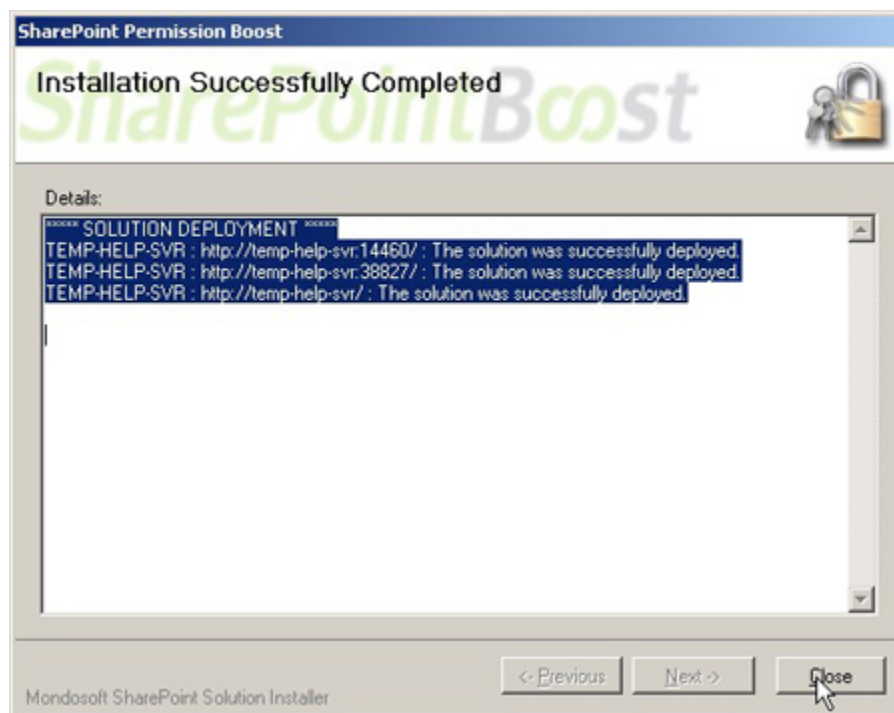
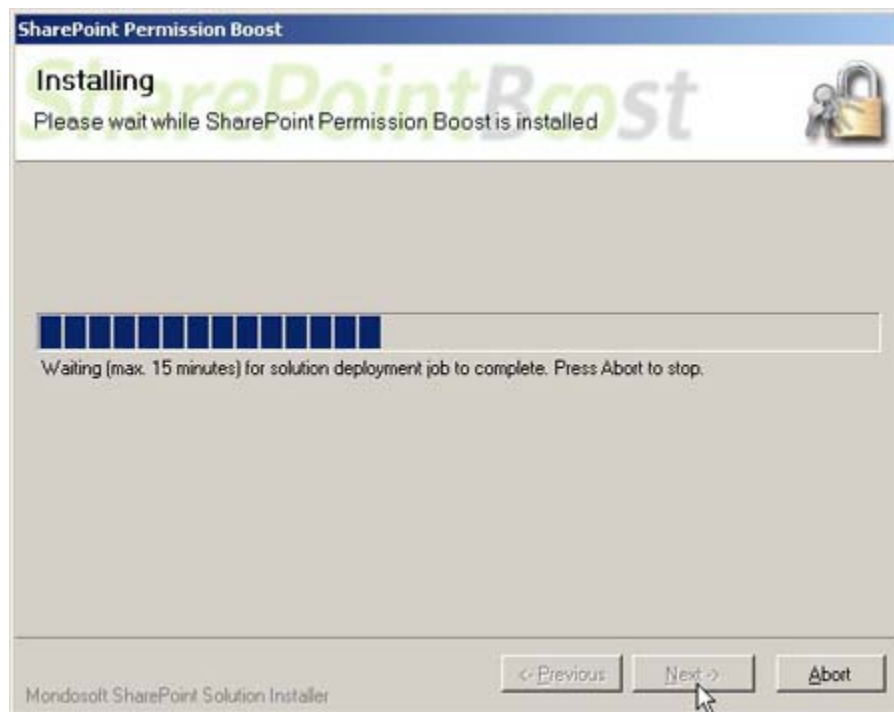
After reading License Agreement, click "accept" and go to next step.



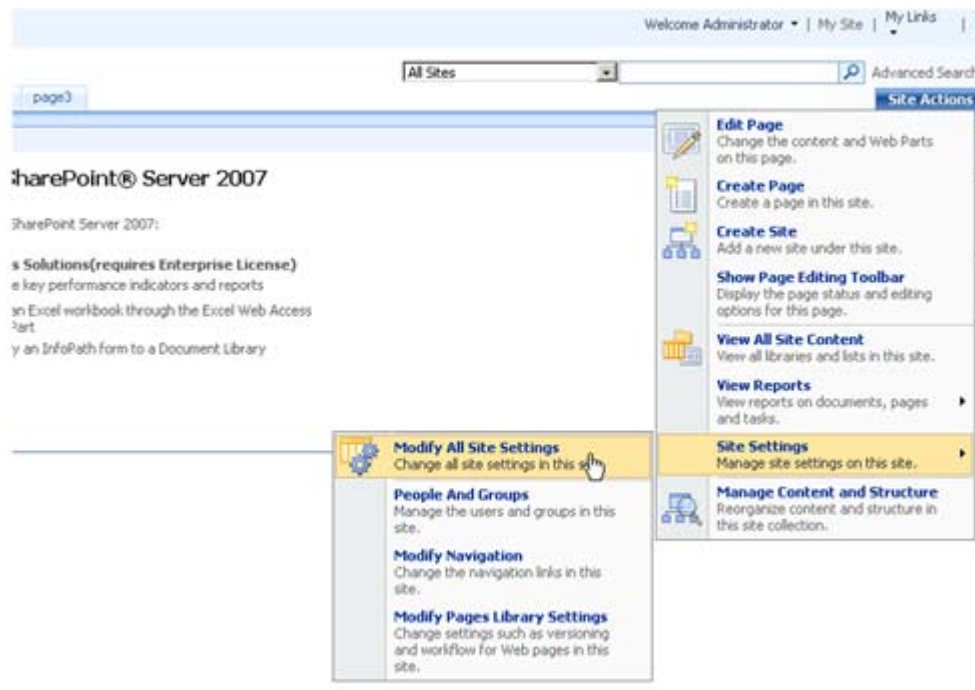
Select one or more web applications and click "Next".



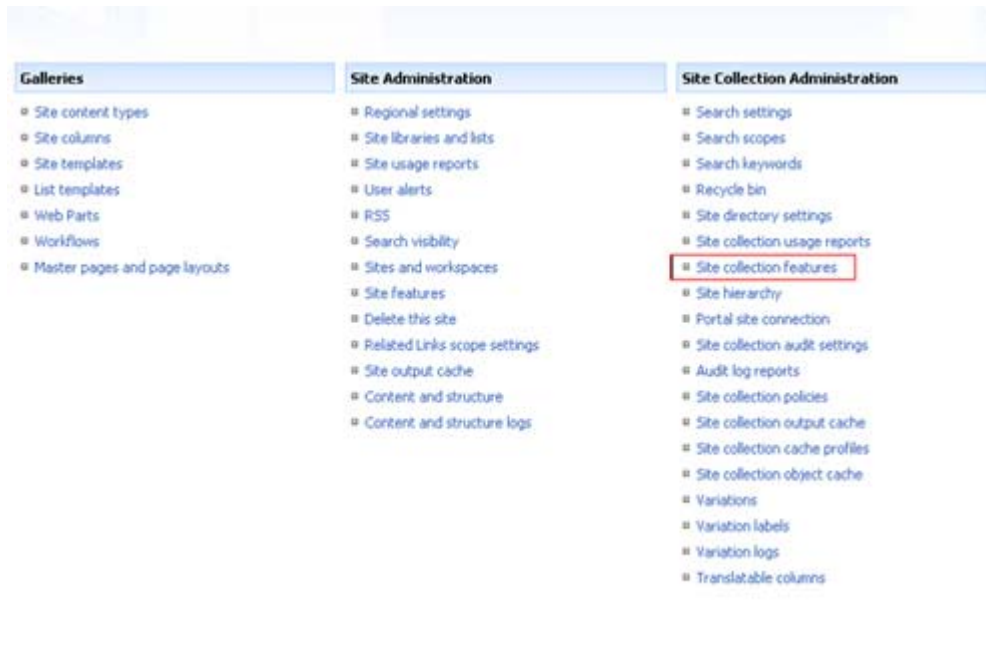
Wait for installing, click “Next” for more deployment details.



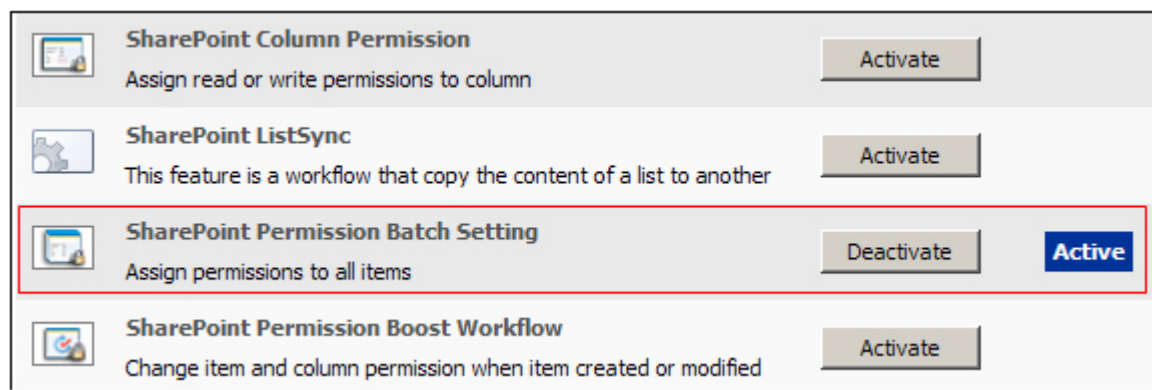
Choose Site Actions dropdown menu, click “Modify All Site Settings”, and enter “Site Settings” page.



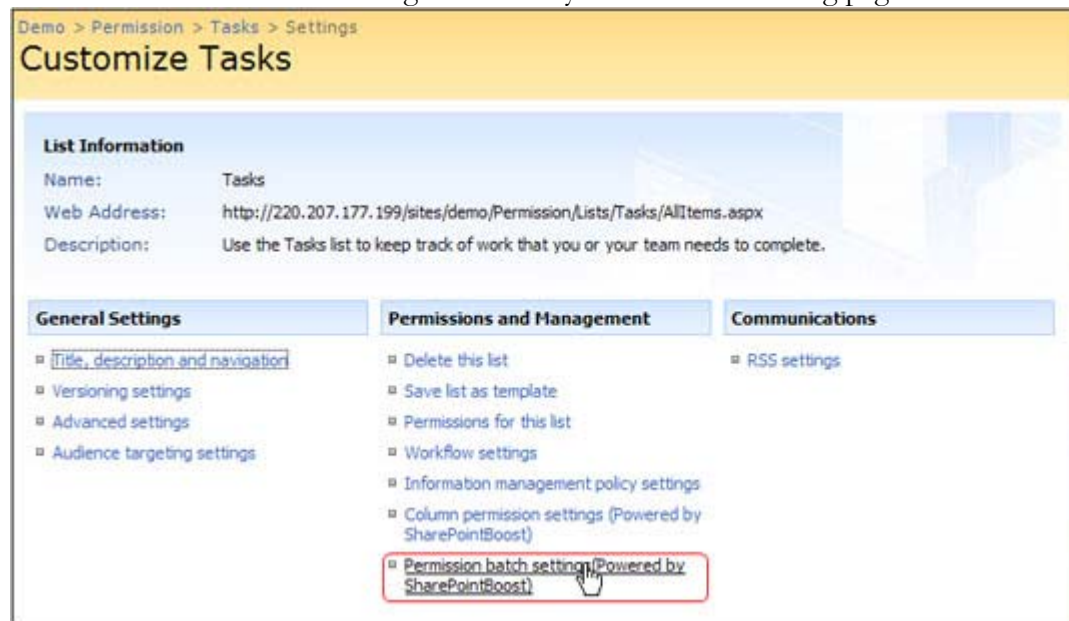
Select "Site Collection Features".



In SharePoint Site collection feature list, activate the SharePoint Permission Batch Setting.

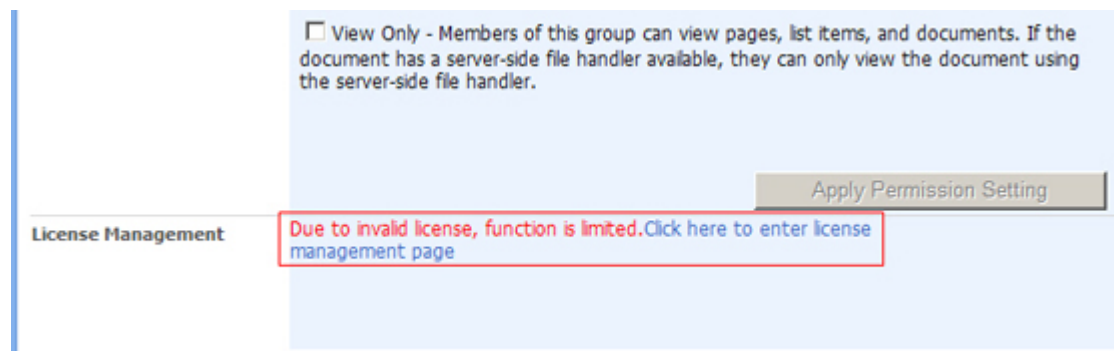


After installation, you can find Permission batch setting link in every list workflow setting page.

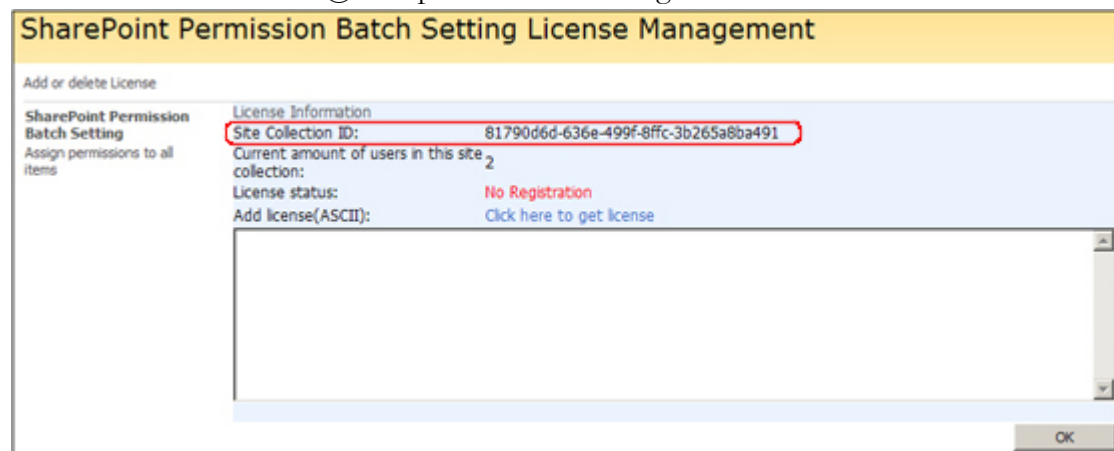


License Management

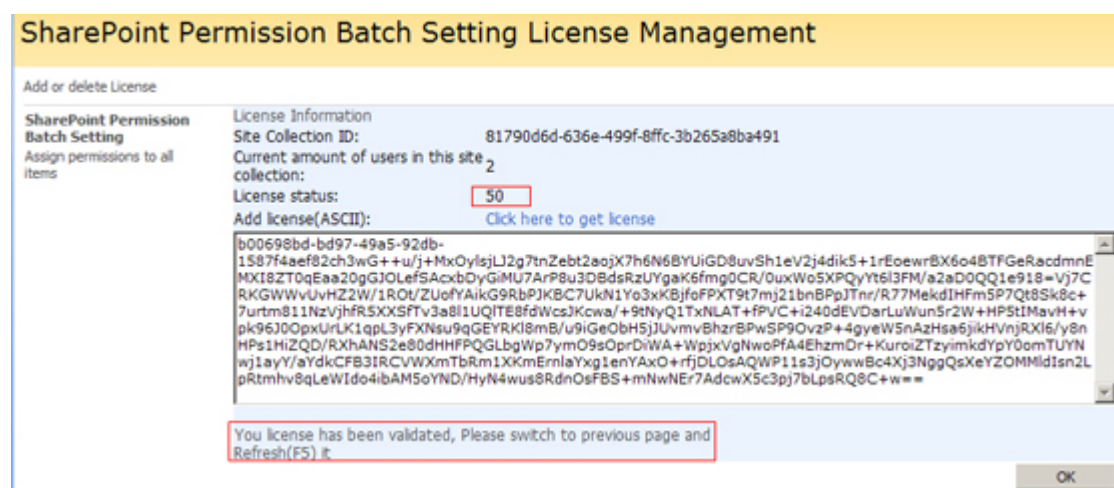
Click the hyper link in Permission Batch setting page to visit Permission Batch license management page.



After payment, send site collection ID to sales@sharepointboost.com to generate license code.

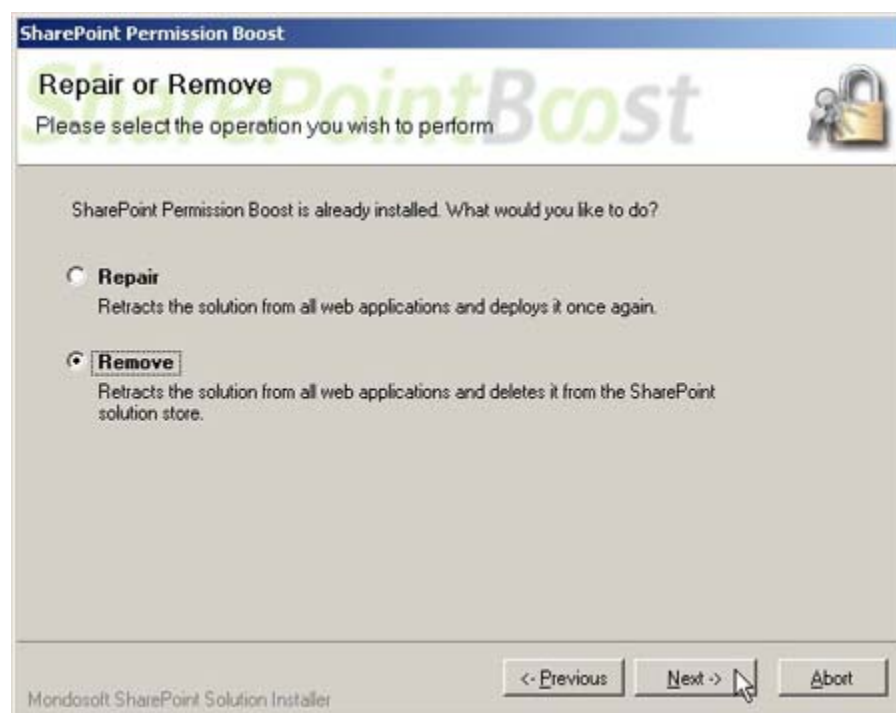


Enter license code and click "OK".



Uninstall

Run "setup.exe" again. (If your install file has been deleted, you can download it from http://www.sharepointboost.com). In Repair and Remove page, select Remove radio button and click "Next", the Permission Batch will be uninstalled.



SharePoint Permission Batch Setting Tutorial

SharePoint Permission Batch Setting can add or remove permissions to each item in a list without changing original permission settings.

In the following mini task system, each task can only be edited by the person to whom the task is assigned.

The screenshot shows a SharePoint interface with three panels. The top panel is the 'Tasks' list, the middle panel is the 'Permissions: Write document' page, and the bottom panel is the 'Permissions: Bug fix' page. Red boxes highlight the task titles and the user names in the permission tables.

Tasks List:

ID	Title	Assigned To	Status	Priority	Due Date	% Complete
	Write document NEW	Bill	In Progress	(2) Normal	7/11/2008	50%
	Bug fix NEW	Jerry	In Progress	(2) Normal	7/24/2008	10%

Permissions: Write document

Users/Groups	Type	User Name	Permissions
<input type="checkbox"/> Bill	User	SMALLBUSINESS\bill	Contribute

Permissions: Bug fix

Users/Groups	Type	User Name	Permissions
<input type="checkbox"/> Jerry	User	SMALLBUSINESS\jerry	Contribute

Henry is the director of Jerry and Bill, and he should be given permission to each item. With SharePoint Permission Batch Setting, the above request can easily be done.

Click Settings menu and choose list setting. In the list setting page, select "Permission batch settings".

Demo > Permission > Tasks > Settings

Customize Tasks

List Information

Name: Tasks
 Web Address: http://220.207.177.199/sites/demo/Permission/Lists/Tasks/AllItems.aspx
 Description: Use the Tasks list to keep track of work that you or your team needs to complete.

General Settings	Permissions and Management	Communications
<ul style="list-style-type: none"> Title, description and navigation Versioning settings Advanced settings Audience targeting settings 	<ul style="list-style-type: none"> Delete this list Save list as template Permissions for this list Workflow settings Information management policy settings Column permission settings (Powered by SharePointBoost) Permission batch settings (Powered by SharePointBoost) 	<ul style="list-style-type: none"> RSS settings

Assign Henry Full Control and Read permission to all items.

Add or Remove Permission
 Add or Remove permission for all item
 This action will **disable** the SharePoint Permission Boost Workflow in current list.

Add/Remove Permission:

Add permission to all items
 Remove permission to all items

Users/Groups:

Henry

Choose user/group columns which represent users/groups:

Employee Name
 Leader
 Created By
 Modified By

Permissions:

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.
 View Only - Members of this group can view pages, list items, and documents. If the document has a server-side file handler available, they can only view the document using the server-side file handler.

Apply Permission Setting

And then you can see the following results.

Home > TogetherSuite > Tasks > write document > Permissions

Permissions: write document

Use this page to assign users and groups permission to this list item. This list item does not inherit permissions from its parent folder or list.

New | Actions

<input type="checkbox"/>	Users/Groups	Type	User Name	Permissions
<input type="checkbox"/>	Bill	User	SMALLBUSINESS\bill	Contribute
<input type="checkbox"/>	Herny	User	SMALLBUSINESS\henry	Full Control, Read

Home > TogetherSuite > Tasks > bug fixed > Permissions

Permissions: bug fixed

Use this page to assign users and groups permission to this list item. This list item does not inherit permissions from its parent folder or list.

New | Actions

<input type="checkbox"/>	Users/Groups	Type	User Name	Permissions
<input type="checkbox"/>	Herny	User	SMALLBUSINESS\henry	Full Control, Read
<input type="checkbox"/>	Jerry	User	SMALLBUSINESS\jerry	Contribute

If it is unnecessary to set unique permission to each item, click "Inherit Permission From List" in permission batch page.

Inherit Permissions From List

All items will inherit permissions from parent list permission. All custom permission will be lost.

All items inherit permission from parent list permission and custom permission loses.

Home > TogetherSuite > Tasks > write document > Permissions

Permissions: write document

Use this page to assign users and groups permission to this list item. This list item does not inherit permissions from its parent folder or list.

New | Actions

<input type="checkbox"/>	Users/Groups	Type	User Name	Permissions
<input type="checkbox"/>	Bill	User	SMALLBUSINESS\bill	Contribute
<input type="checkbox"/>	Herny	User	SMALLBUSINESS\henry	Full Control, Read

Home > TogetherSuite > Tasks > bug fixed > Permissions

Permissions: bug fixed

Use this page to assign users and groups permission to this list item. This list item does not inherit permissions from its parent folder or list.

New | Actions

<input type="checkbox"/>	Users/Groups	Type	User Name	Permissions
<input type="checkbox"/>	Herny	User	SMALLBUSINESS\henry	Full Control, Read
<input type="checkbox"/>	Jerry	User	SMALLBUSINESS\jerry	Contribute

Note:

Applying SharePoint Permission Batch Setting will disable SharePoint Permission Boost Workflow.

Home > TogetherSuite > Tasks > Customize Workflow

Customize Permission Boost

Permission Boost main setting page

After settings changed, please click OK

Apply following permission settings for all items

Users/groups	Item permissions	Enabled
{Marketing}	Read	Yes

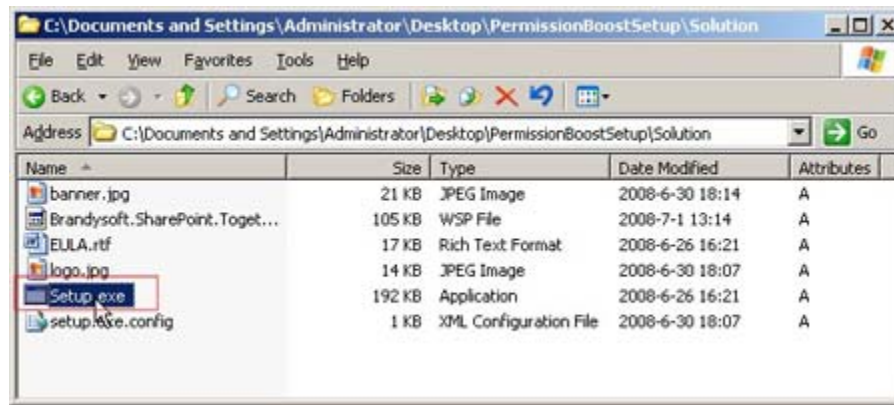
SharePoint Permission Workflow Installation Instruction

System Requirements

Microsoft Windows SharePoint Services v3 or Microsoft Office SharePoint Server 2007.

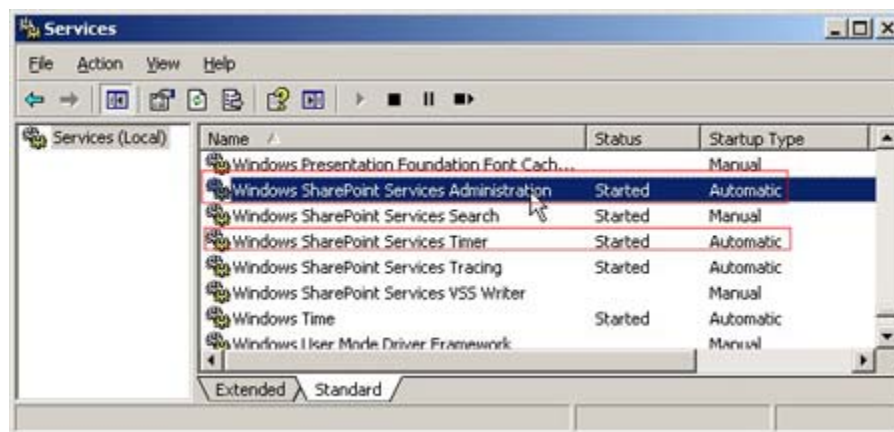
Install

Download SharePoint Permission Workflow install file from SharePointBoost website, release the file, and run "setup.exe".

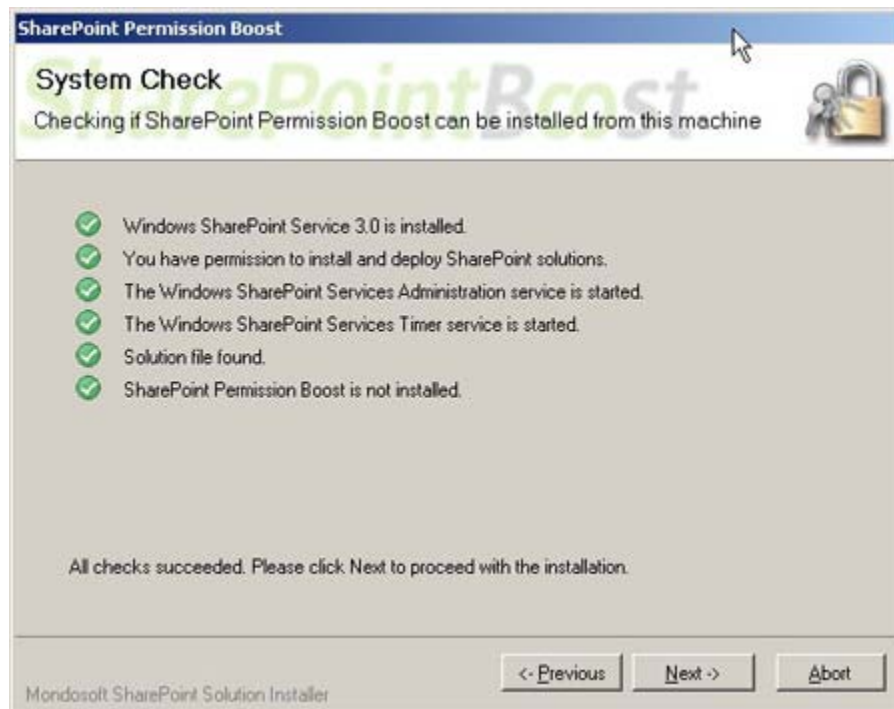


Note:

You must be the SharePoint Farm Administrator.



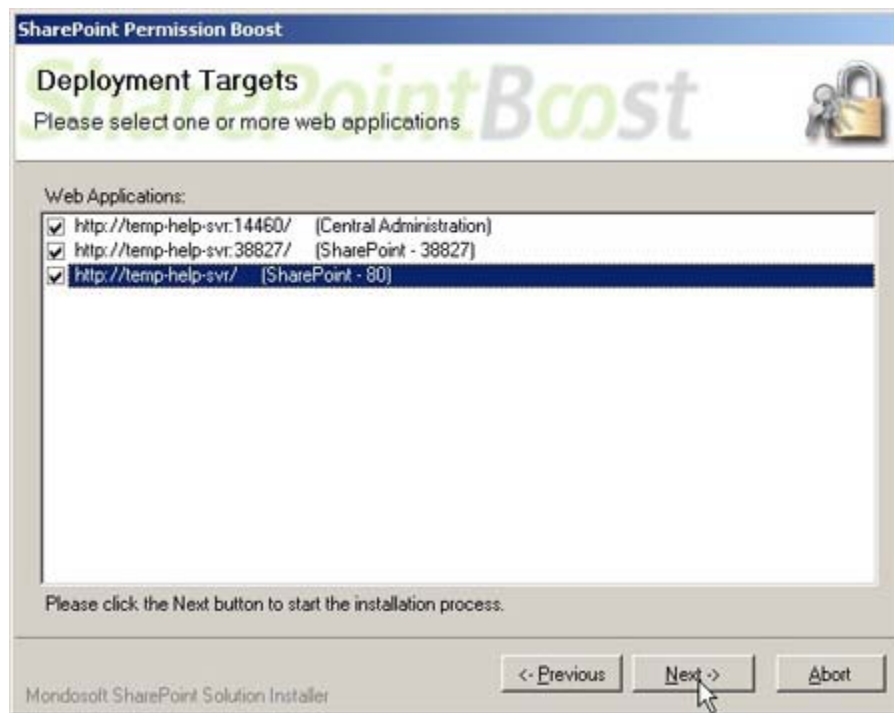
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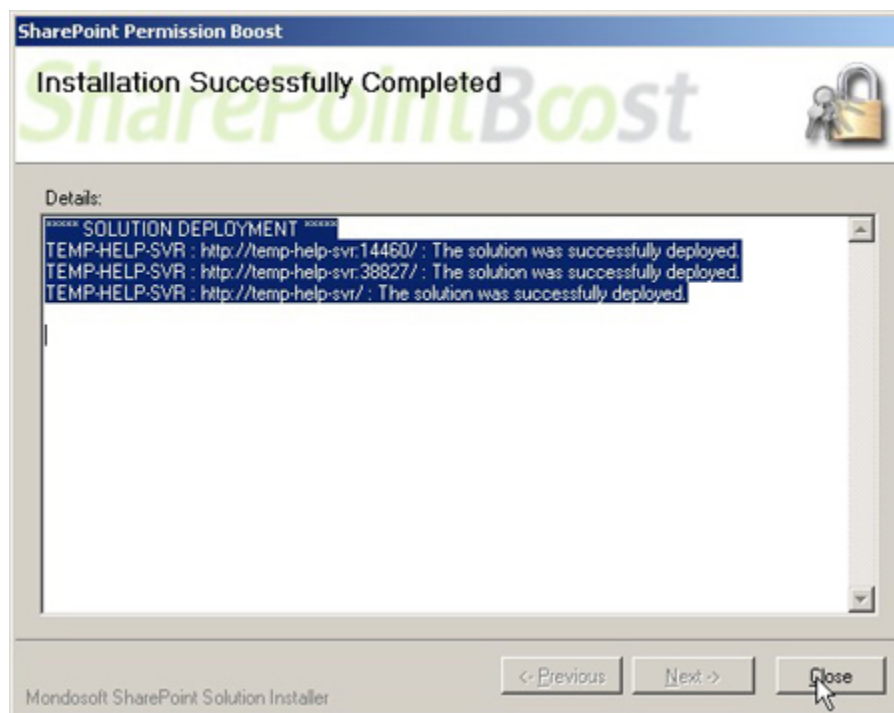
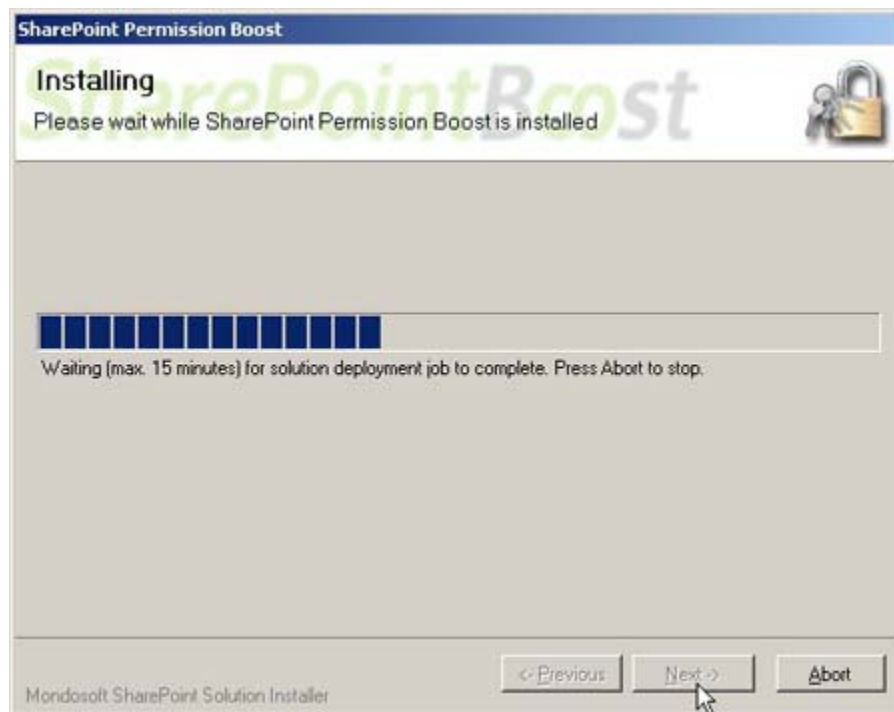
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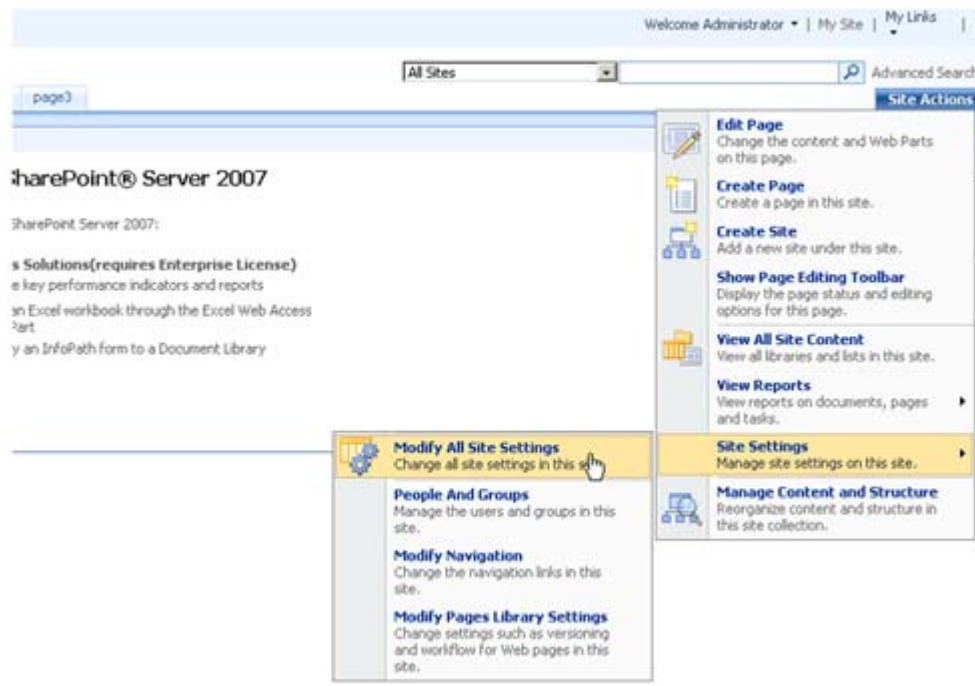
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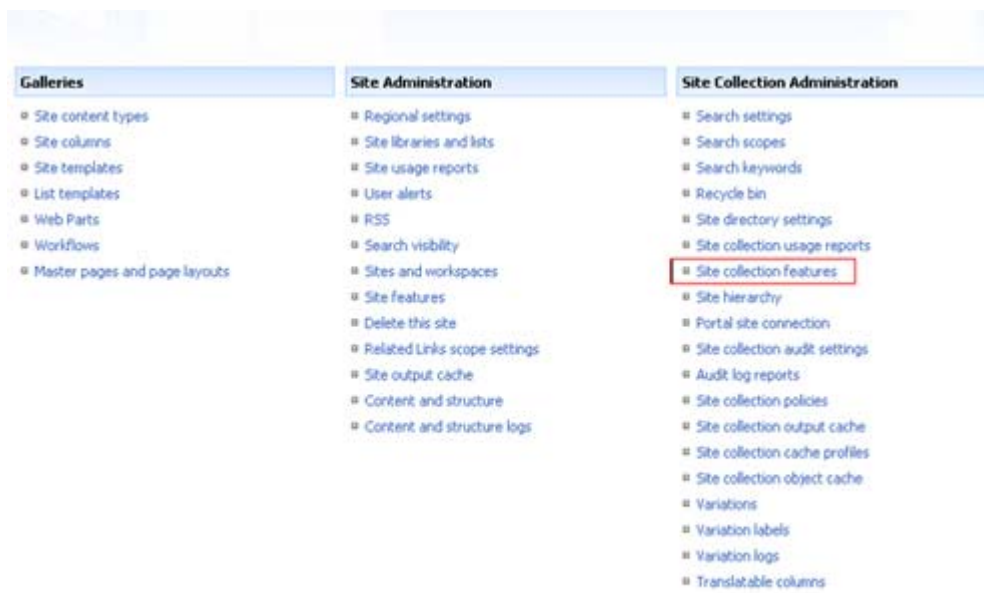
Wait for installing, click “Next” for more deployment details.



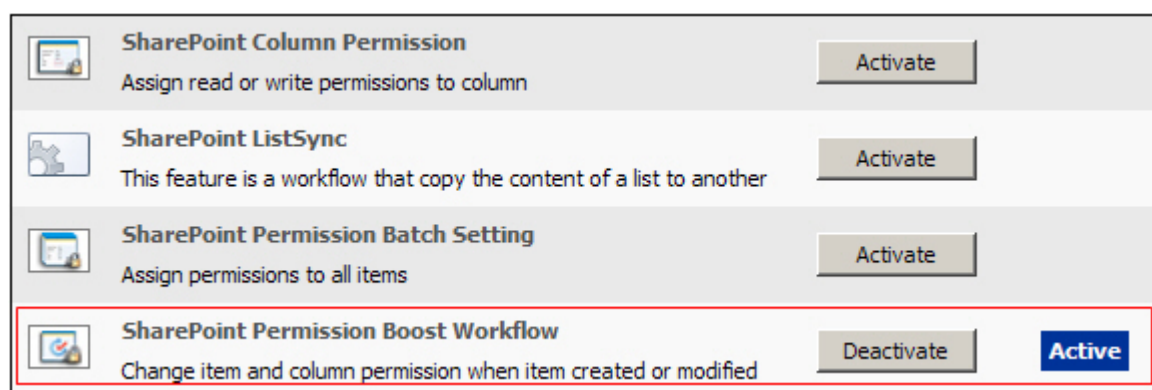
Choose Site Actions dropdown menu, click “Modify All Site Settings”, and enter “Site Settings” page.



Select “Site Collection Features”.



In SharePoint Site collection feature list, activate SharePoint Permission Boost Workflow.

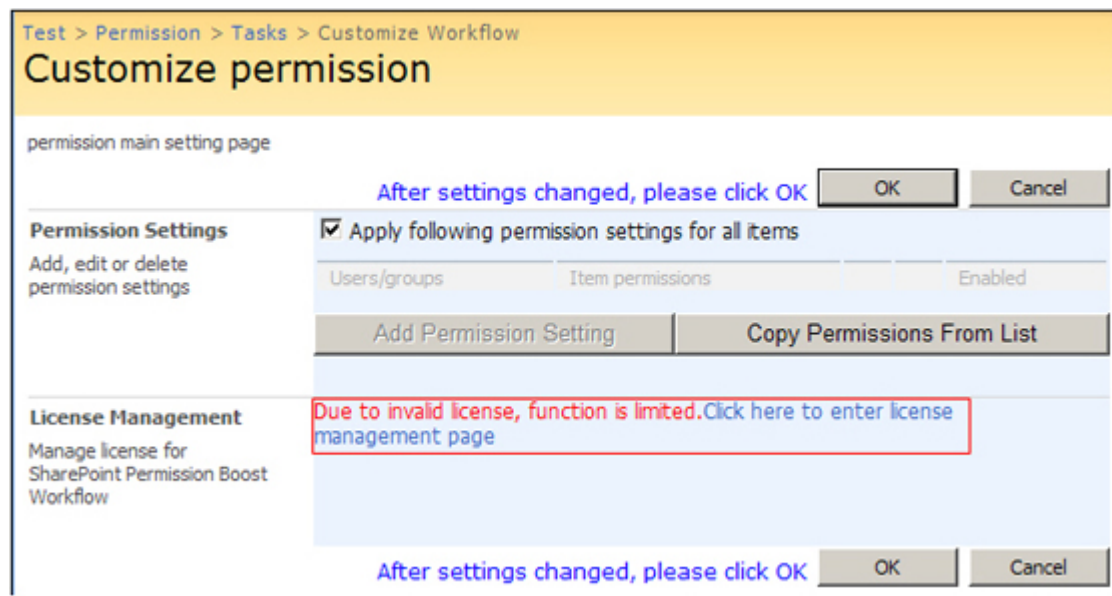


After installation, you can find SharePoint Permission Boost workflow in every list workflow setting page.

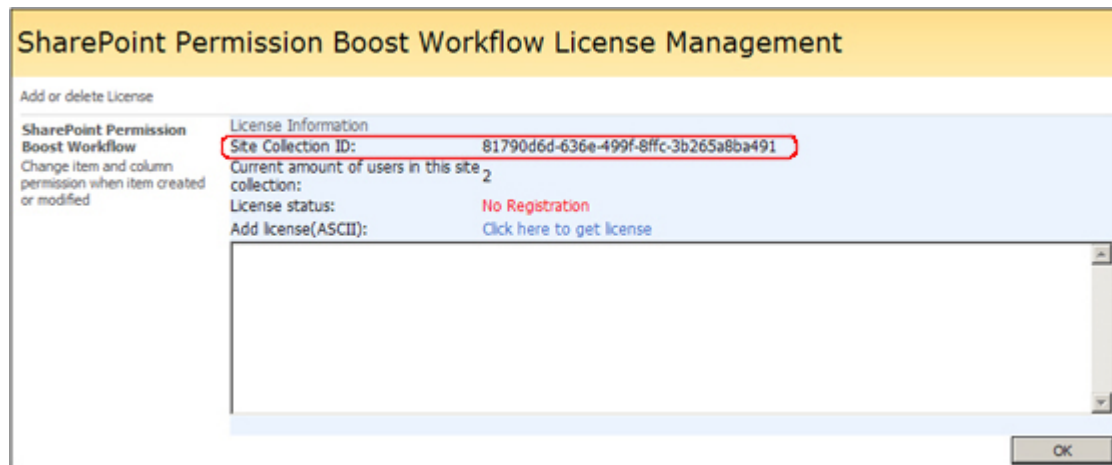


License Management

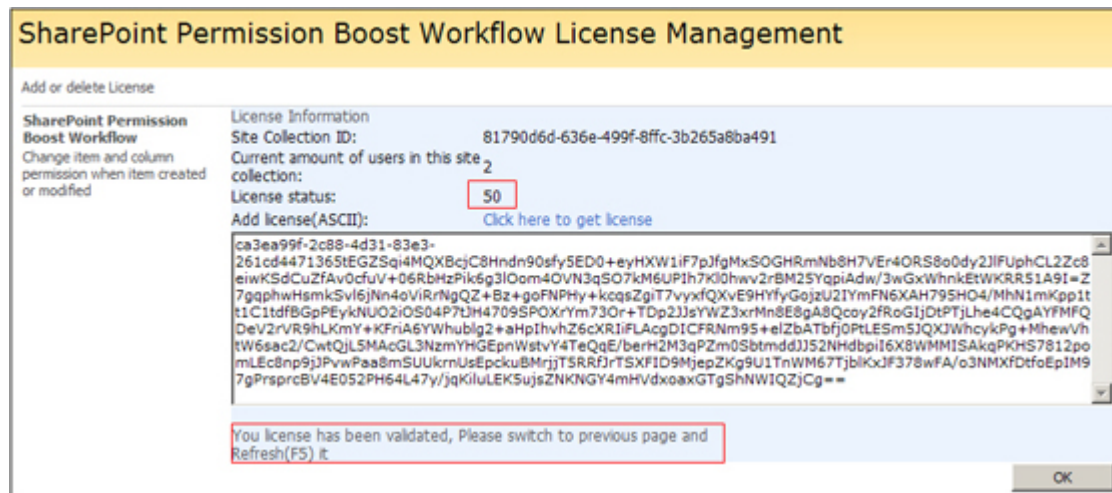
Click the link in Permission Boost workflow main page and visit Permission Boost workflow license management page.



After payment, send site collection ID to sales@sharepointboost.com to generate license code.

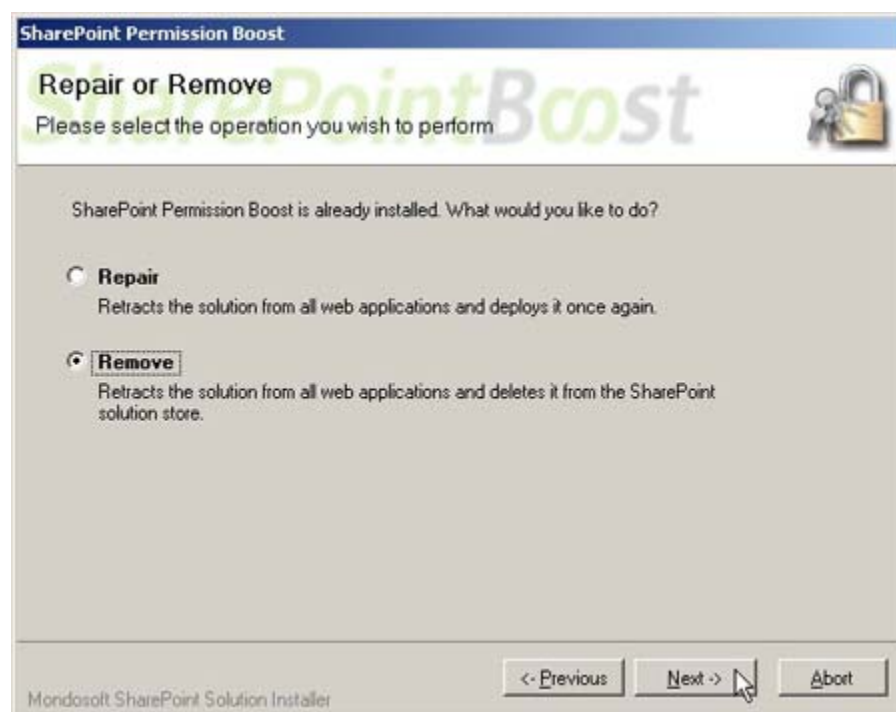


Enter license code and click "OK".



Uninstall

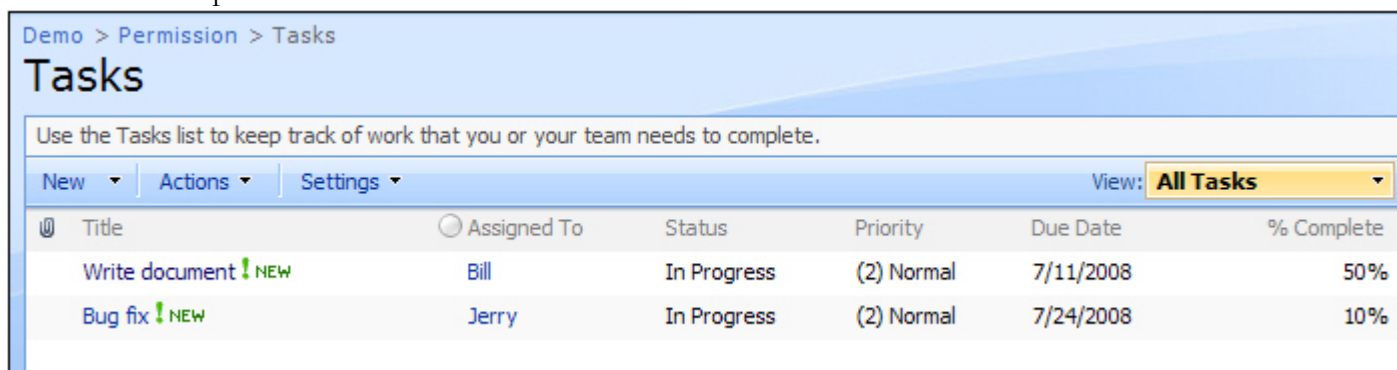
Run "setup.exe" again. (If your install file has been deleted, you can download it from <http://www.sharepointboost.com>). In the Repair and Remove page, select the Remove radio button and click "Next", the Permission Boost Workflow will be uninstalled.







SharePoint Permission Workflow Tutorial

SharePoint Permission Boost Workflow can change item permissions automatically when it is created or modified.

In task system, the person to whom the task is assigned and Henry can modify the task. That means that only Henry and the person has the contribute permission for the item.



The screenshot shows a SharePoint 'Tasks' list. At the top, there is a breadcrumb 'Demo > Permission > Tasks' and the title 'Tasks'. Below the title is a subtitle: 'Use the Tasks list to keep track of work that you or your team needs to complete.' There are three menu items: 'New', 'Actions', and 'Settings'. On the right, there is a 'View:' dropdown menu set to 'All Tasks'. The main content is a table with the following data:

	Title	 Assigned To	Status	Priority	Due Date	% Complete
	Write document  NEW	Bill	In Progress	(2) Normal	7/11/2008	50%
	Bug fix  NEW	Jerry	In Progress	(2) Normal	7/24/2008	10%

Enter workflow setting page and add a new SharePoint Permission Workflow. In permission setting main page, add a new permission part.

Users or Groups
The permissions of these users or groups will be modified.

Input users/groups

Herny

Choose user/group columns which represent users/groups.

Created By

Modified By

Assigned To

Task Group

Item Permissions
Choose the item permissions you want these users or groups to have.

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.

View Only - Members of this group can view pages, list items, and documents. If the document has a server-side file handler available, they can only view the document using the server-side file handler.

Click "Ok". Return to permission main setting page, and select "Apply following permission settings for all items" box.

Demo > Permission > Tasks > Customize Workflow

Customize Permission

Permission main setting page

After settings changed, please click OK

Apply following permission settings for all items

Users/groups	Item permissions	Enabled
Herny;[Assigned To]	Contribute	Yes

Add Permission Setting Copy Permissions From List

[Click here to enter license management page](#)

License Management
Manage license for SharePoint Permission Boost Workflow

After configuring the workflow, permissions of all items will be changed. The following is a typical example of permission settings for "Create document" item.

Demo > Permission > Tasks > Write document > Permissions

Permissions: Write document

Use this page to assign users and groups permission to this list item. This list item does not inherit permissions from its parent folder or list.

New | Actions

<input type="checkbox"/>	Users/Groups	Type	User Name	Permissions
<input type="checkbox"/>	Bill	User	SMALLBUSINESS\bill	Contribute
<input type="checkbox"/>	Herny	User	SMALLBUSINESS\herny	Contribute

If the column "Assign To" switches from Bill to Tom, the permission of item will be altered automatically.

Demo > Permission > Tasks > Write document > Permissions

Permissions: Write document

Use this page to assign users and groups permission to this list item. This list item does not inherit permissions from its parent folder or list.

New ▾ | Actions ▾

<input type="checkbox"/>	<input type="radio"/> Users/Groups	Type	User Name	Permissions
<input type="checkbox"/>	Henry	User	SMALLBUSINESS\henry	Contribute
<input type="checkbox"/>	Tom	User	SMALLBUSINESS\tom	Contribute