

## SharePoint Permission Workflow

Please note that Permission Workflow has to be activated before it can be used. For further reference, please see our [Product Installation Guide](#).

Further information is also available in our [FAQ](#).

### Feature Introduction

#### *User/Group Selection Process*

The User/Group selection process has been modified and improved compared to the previous version. One distinctive difference is that administrators are now able to specify in far more detail which users to include. Permission Workflow now allows for specific selection of users and groups by Selecting all users/groups or a filter them by:

- a) Input of user or group names
  - b) Selecting user/group columns, as well as relative lookup fields in this list
  - c) Looking up users from other lists and filter them based on conditions
- a) Input user and group names



The screenshot shows a rectangular input field with a light blue border. The text "Enter users/groups" is displayed in the top left corner of the field. At the bottom right corner of the field, there are two small icons: a red person icon and a blue document icon.

As in previous versions, Permission Workflow provides a box to enter any user or group name. It also allows entering multiple users or groups, and as with the default user selection, the administrator can look up names or check the names entered into the box.

- b) Selecting user/group columns, as well as relative lookup fields in this list



The screenshot shows a selection panel with a light blue border. The title "Choose columns containing users or user groups" is at the top. Below the title, there is a checkbox labeled "Display any related columns (i.e. lookup columns)". Below this, there is a list of three items, each with a checkbox: "User", "Created By", and "Modified By".

As in previous versions, Permission Workflow provides checkboxes with all User/group columns available. Checking these checkboxes will result in selecting the users which are contained

within the selected column. The administrator can also select related columns, if the checkbox to display them is checked. This means that all user/group columns in the list that is looked up from will be available for selection.

### c) Looking up users from other lists and filter them based on conditions

Choose user or group columns from another SharePoint list

Choose user/group columns from a different list:

Select a site: Global Home

Select a list: ActiveDirectoryConfig

Select a column containing people or groups:

Created By

Modified By

Add condition

Enter a condition to determine the people or groups to which the permissions will be assigned:

[Insert column...] [Insert operator...] [Insert function...]

**Function Help Tip**

Test Condition Settings

[Add users from another list](#)

The process to select users from another list works in 3 steps:

1. Specify the list to look up from. To do so, the administrator has to firstly select the site on which the list is located. Note that only sites in the same site collection are available. All lists located on this site will be available for selection in another dropdown list.
2. Specify the User/Group columns that will be used to specify the users. These are to be selected through checkboxes, similar to the User/Group column selection in the original list. However, no related columns are available to select in this selection.
3. A final step is the ability to filter the users selected based on conditions.

### *Specify Selection Criteria Based on Conditions*

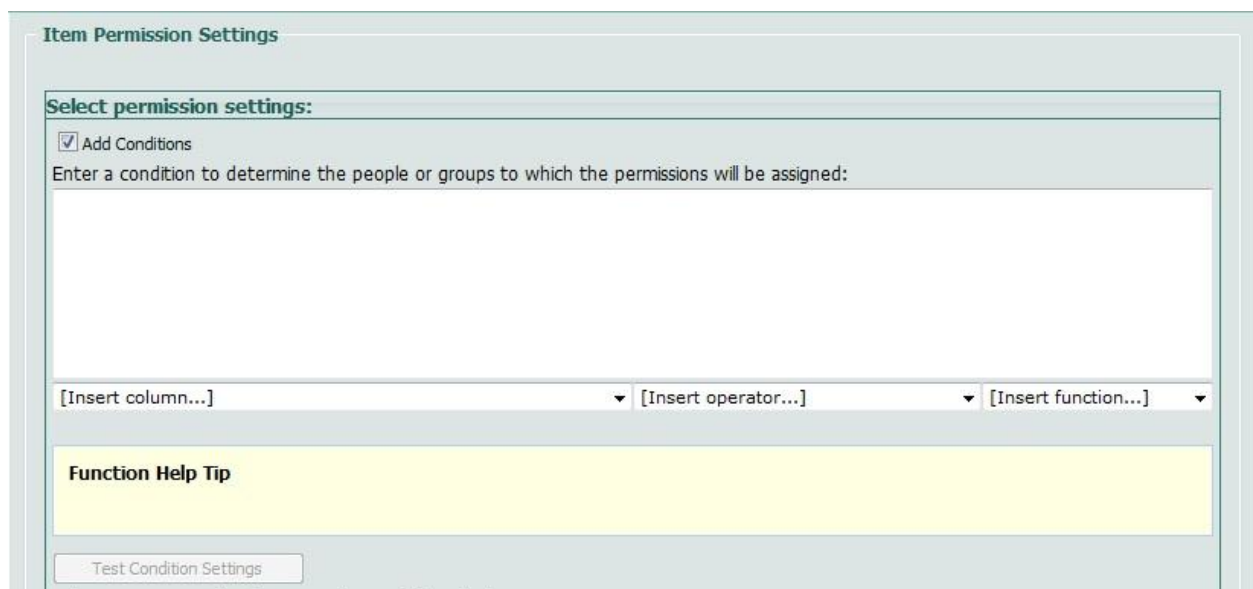
We have introduced conditions to specify user and items even more precise, and thus providing an even more granular approach. The conditions sections have been added in two sections:

- a) For filtering users/groups from other sites
- b) For specifying the items that will be affected by the permission settings

a) The process to select users from another list works in 3 steps:

1. Specify the list to look up from. To do so, the administrator has to firstly select the site on which the list is located. Then all lists located on this site will be available for selection in a dropdown list.
2. Specify the User/Group columns that will be used to specify the users. These are to be selected through checkboxes, similar to the User/Group column selection in the original list.
3. Filter the results by specifying conditions. The conditions allow building relationships between the User/Group columns and any other column existing in the list. This will effectively result in only selecting users who meet the conditions specified.

b) Specifying items that will be affected by the permission settings:



By entering conditions, the administrator can specify for which items the permissions are set. The main difference to the user selection process is that these conditions are only based on the current list. There is no reference to other lists possible. Also, the selection process is not based on any associated columns with the user selection, but it takes direct effect.

## *Conditions Guide*

For further information about how to use conditions in SharePointBoost products, see our [Conditions Guide](#) for your reference.

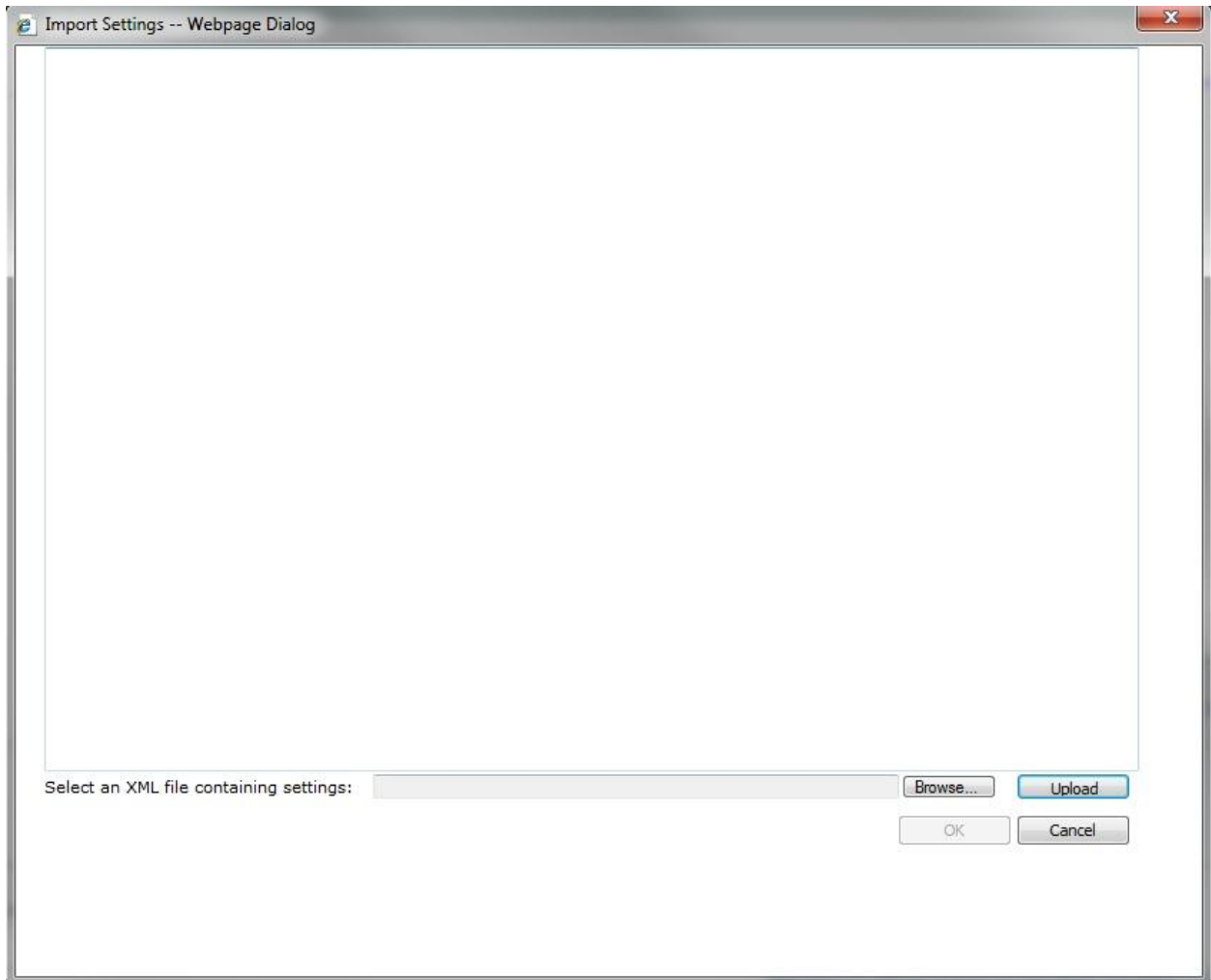
## *Import/Export Permission Parts*

### **Import or Export**

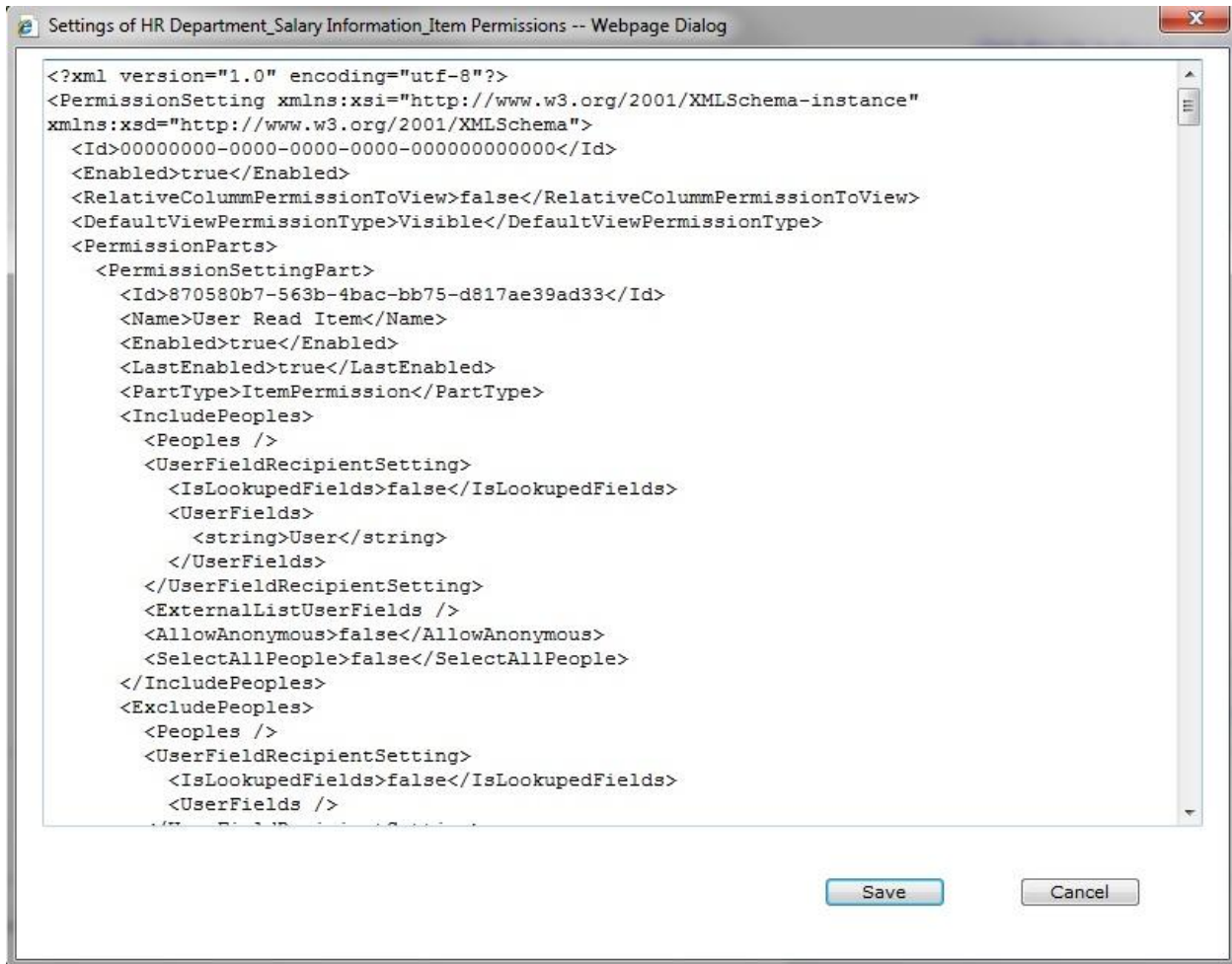
Import or export current settings as an xml file.



The new version of Permission Workflow allows for importing and exporting permission parts. This function is based on XML files. Thus, creating similar permissions for different sites will be easier and less time consuming.

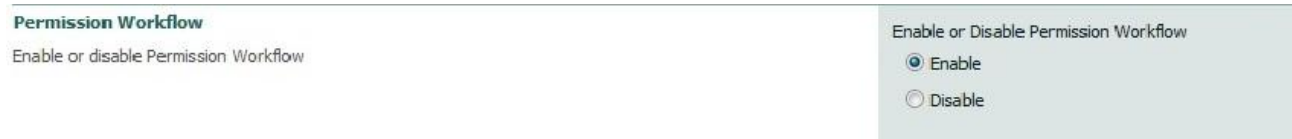


To import settings click the Import button. A popup window will open. There the administrator can either paste the XML file contents into the designated area, or browse for a file and upload it. After uploading the file the contents will be displayed in the area above the upload area. To confirm importing the XML file click the OK button. To abort importing the specified permission settings, click the Cancel button.



To export permission settings click the Export button. A popup window will open and display the XML file contents in the edit area. The administrator can then save the settings to any location and thus make it reusable in other lists. To abort exporting the settings, click the Cancel button.

*Enable or Disable Permission Workflow*



This function allows the administrator to enable or disable all permission settings in Permission Workflow. Please note that previously made changes will not be affected if the workflow has been disabled. However, if new items are added or existing ones being changed, the Permission Workflow settings will not be applied.

## Permission Settings

Permission Settings Name (Click to edit)	Click to Delete	Enable/Disable	State
User Read Item	<input type="button" value="Delete"/>	<input type="button" value="Disable"/>	<input type="button" value="Enabled"/>

[Add Item Permission Settings](#)  
[Click here to restore the original permission settings for users \(for this list only\)](#)

The upper part of this section displays a table with all permission settings that already have been set up with Permission Boost. These can be either deleted, or disabled/enabled. To modify existing permission settings the administrator has to click the name of the permission settings. This will then open the settings page for the specific permission settings.

The "Add Item Permission Settings" allows the administrator to create new permission settings. Clicking the link will open the settings page for new permission settings.

The "Click here to restore the original settings for users (for this list only)" link will create permission settings with Permission Workflow that are identical to the original list permissions for each user.

Permission Settings Name (Click to edit)	Click to Delete	Enable/Disable	State
User Read Item	<input type="button" value="Delete"/>	<input type="button" value="Disable"/>	<input type="button" value="Enabled"/>
{Team Site Owners}	<input type="button" value="Delete"/>	<input type="button" value="Disable"/>	<input type="button" value="Enabled"/>
{Team Site Visitors}	<input type="button" value="Delete"/>	<input type="button" value="Disable"/>	<input type="button" value="Enabled"/>
{Team Site Members}	<input type="button" value="Delete"/>	<input type="button" value="Disable"/>	<input type="button" value="Enabled"/>
{Designers}	<input type="button" value="Delete"/>	<input type="button" value="Disable"/>	<input type="button" value="Enabled"/>
{Hierarchy Managers}	<input type="button" value="Delete"/>	<input type="button" value="Disable"/>	<input type="button" value="Enabled"/>
{Approvers}	<input type="button" value="Delete"/>	<input type="button" value="Disable"/>	<input type="button" value="Enabled"/>
{Restricted Readers}	<input type="button" value="Delete"/>	<input type="button" value="Disable"/>	<input type="button" value="Enabled"/>
{Viewers}	<input type="button" value="Delete"/>	<input type="button" value="Disable"/>	<input type="button" value="Enabled"/>

[Add Item Permission Settings](#)  
[Click here to restore the original permission settings for users \(for this list only\)](#)

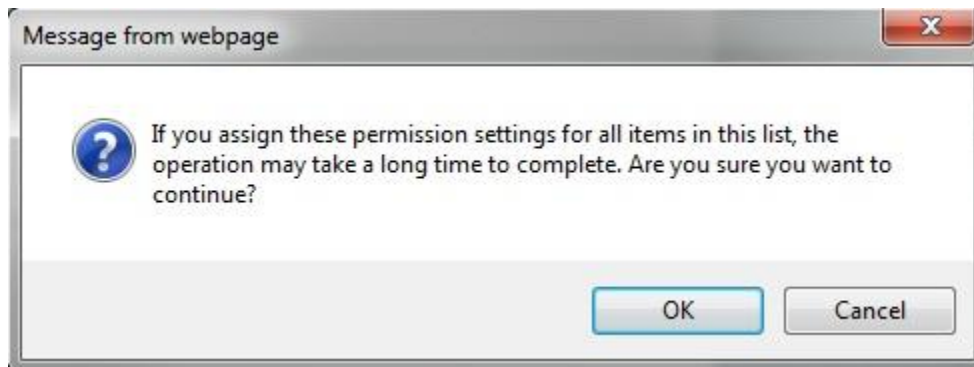
## Assign permissions for all items

### Assign permissions for all items

If you check this checkbox, item-level permission settings will be applied for ALL previously existing items in this list.

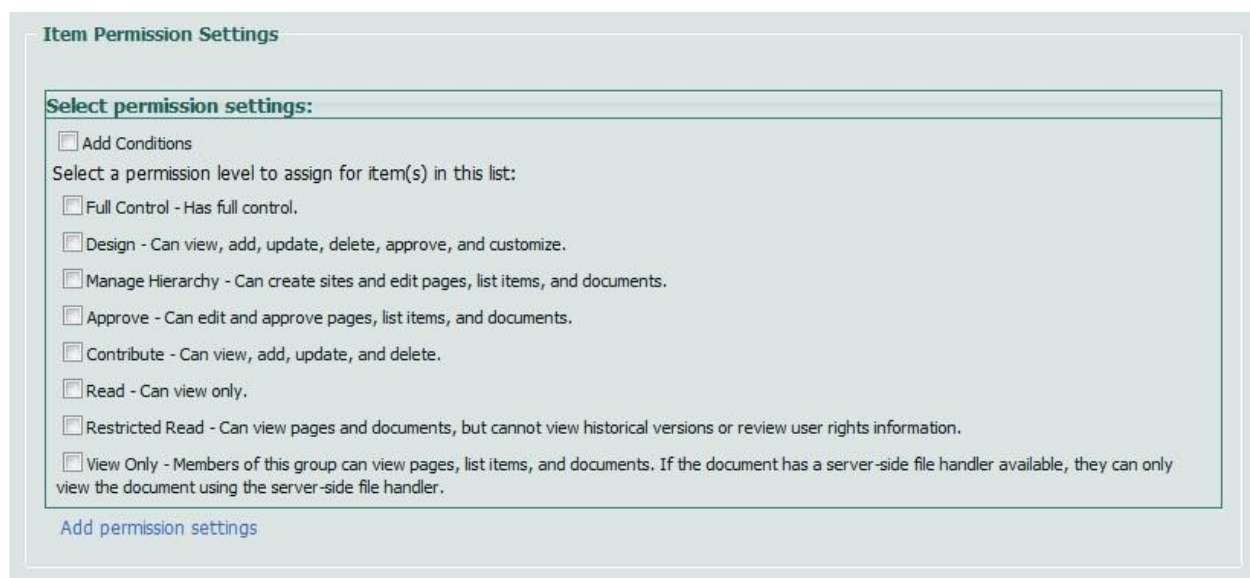
Assign item-level permissions for all items

This feature will apply the settings made with Permission Workflow to all existing items. This is a useful tool if the workflow is set up for the first time on an already existing list with existing items. Checking the checkbox will prompt a popup window notifying the administrator that it might take some time to apply these changes to all items, and requesting confirmation to proceed.



To finally implement these changes the administrator has to confirm by clicking the OK button in the main settings page.

### *Item Permission Settings*





The Item Permission Settings specify to which items the settings should apply, and what permissions the users should have for these items. To specify the items affected the users can use conditions by clicking "Add Conditions".

After that the level of access has to be set. These permission levels are pulled from the Site Collection permission settings.

The option "Add permission settings" will open a similar pane, so that several different permission settings can be created for similar users.

### Example

If a company is keeping salary information in a list, and that list is accessible to everybody in the company, this would result in big issues with respect to confidentiality. The screenshot below illustrates this. Logging in as Anthony Rodriguez, all information about salaries of every employee in the company is visible, and editable.

Global Home > HR Department > Salary Information

### Salary Information

New Actions View: Salary Info Confiden...

User	Employee ID	Social Security Number	Salary
Rachel Jackson	JR010608AD03	308-78-1766	\$50,000.00
John Smith	SJ010708AD04	488-04-3293	\$47,000.00
Catherine Brown	BC150707MK05	074-50-0789	\$80,000.00
Peter Anderson	AP010708MK06	680-86-8856	\$44,000.00
Madison Taylor	TM010808MK07	305-66-0545	\$43,000.00
Isabella Garcia	GI010808MK08	764-46-6984	\$41,000.00
Mary Jackson	JM010109MK09	529-66-8285	\$42,000.00
Michael Peters	PM010608GM01	265-63-0983	\$120,000.00
Jennifer Smith	SJ010109MK10	393-70-6868	\$40,000.00
James White	WJ010608PD11	452-30-8128	\$90,000.00
Daniel Lopez	LP010708PD12	536-31-4783	\$60,000.00
Angela Phillips	PA010708PD13	006-42-9357	\$48,000.00
Claire Turner	TC010808PD14	618-38-5574	\$40,000.00
Anthony Rodriguez	RA010808PD15	632-01-1179	\$40,000.00
Kevin Lee	LK010109PD16	008-68-1919	\$50,000.00
Susan Lewis	LS010609PD17	530-95-7093	\$45,000.00
Mary Johnson	JM010708PD18	431-72-4648	\$40,000.00
Ashley Davis	DA010109PD19	422-60-7849	\$40,000.00

Permission Workflow can set permission so users can only see their own information in this list. To do so the administrator has to create a workflow in this list, and there select SPB Permission Workflow. To make sure the workflow is applied to all items, the checkboxes to start the workflow when new items are created and when items are changed should be checked.

## Change a Workflow: Salary Information

Use this page to change the settings of an existing workflow.

<p><b>Workflow</b></p> <p>Select a workflow to add to this list. If the workflow template you want does not appear, contact your administrator to get it added to your site collection or workspace.</p>	<p>Select a workflow template:</p> <ul style="list-style-type: none"> <li>Disposition Approval</li> <li>SharePointBoost Alert Workflow</li> <li>SharePointBoost Reminder Work</li> <li>SPB Permission Workflow</li> </ul> <p>Description: Automatically assign permissions to individual items as they are created or modified.</p>
<p><b>Name</b></p> <p>Type a name for this workflow. The name will be used to identify this workflow to users of this list.</p>	<p>Type a unique name for this workflow:</p> <p>Permissions</p>
<p><b>Task List</b></p> <p>Select a task list to use with this workflow. You can select an existing task list or request that a new task list be created.</p>	<p>Select a task list:</p> <ul style="list-style-type: none"> <li>Tasks</li> </ul> <p>Description: Use the Tasks list to keep track of work that you or your team needs to complete.</p>
<p><b>History List</b></p> <p>Select a history list to use with this workflow. You can select an existing history list or request that a new history list be created.</p>	<p>Select a history list:</p> <ul style="list-style-type: none"> <li>Workflow History</li> </ul> <p>Description: History list for workflow.</p>
<p><b>Start Options</b></p> <p>Specify how this workflow can be started.</p>	<p><input checked="" type="checkbox"/> Allow this workflow to be manually started by an authenticated user with Edit Items Permissions.</p> <p><input type="checkbox"/> Require Manage Lists Permissions to start the workflow.</p> <p><input type="checkbox"/> Start this workflow to approve publishing a major version of an item.</p> <p><input checked="" type="checkbox"/> Start this workflow when a new item is created.</p> <p><input checked="" type="checkbox"/> Start this workflow when an item is changed.</p>

Next Cancel

Then the Permission Workflow main page will open.

## Customize Salary Information

Permissions Main Settings Page

Click the OK button to apply any changes you have made to permission settings


<p><b>Permission Boost</b></p> <p>Enable or disable Permission Workflow</p>	<p>Enable or Disable Permission Workflow</p> <p><input checked="" type="radio"/> Enable</p> <p><input type="radio"/> Disable</p>								
<p><b>Permission Settings</b></p> <p>Set item-level permission parts.</p>	<table border="1"> <thead> <tr> <th>Permission Settings Name (Click to edit)</th> <th>Click to Delete</th> <th>Enable/Disable</th> <th>State</th> </tr> </thead> <tbody> <tr> <td>User Read Item</td> <td>Delete</td> <td>Disable</td> <td>Enabled</td> </tr> </tbody> </table> <p> <input type="checkbox"/> Add Item Permission Settings  <input type="checkbox"/> Click here to restore the original permission settings for users (for this list only)                 </p>	Permission Settings Name (Click to edit)	Click to Delete	Enable/Disable	State	User Read Item	Delete	Disable	Enabled
Permission Settings Name (Click to edit)	Click to Delete	Enable/Disable	State						
User Read Item	Delete	Disable	Enabled						
<p><b>Import or Export</b></p> <p>Import or export current settings as an xml file.</p>	<p>Import Export</p>								
<p><b>Assign permissions for all items</b></p> <p>If you check this checkbox, item-level permission settings will be applied for ALL previously existing items in this list.</p>	<p><input type="checkbox"/> Assign item-level permissions for all items</p>								
<p><b>License Management</b></p> <p>Manage license for Permission Workflow</p>	<p><a href="#">Click here to manage license for Permission Workflow 2.0.312.1</a></p>								

Click the OK button to apply any changes you have made to permission settings

To add new permission settings click item permission settings, and the settings page will open.

Firstly the Permission Settings have to be named. Then the users have to be selected, in this case we want to select the users associated with the column User, as these represent the items they should have permission to see. After that the permission level has to be specified. As the users should not be able to change their own salary by themselves this will only be set read-only.

## Modify item permission settings

<b>Permission Settings Name</b> Enter a unique name for these permission settings	Enter a name for these Permission Settings: <input type="text" value="User Read Item"/>
<b>Include People</b> Select people to whom you want to assign permissions	<p><b>Enter users/groups</b></p> <input type="text"/> <p style="text-align: right;"></p> <p><b>Choose columns containing users or user groups</b></p> <input type="checkbox"/> Display any related columns (i.e. lookup columns) <hr/> <input checked="" type="checkbox"/> User <input type="checkbox"/> Created By <input type="checkbox"/> Modified By
<b>Permission Settings</b> Permission Settings	<p><b>Item Permission Settings</b></p> <p><b>Select permission settings:</b></p> <input type="checkbox"/> Add Conditions Select a permission level to assign for item(s) in this list:
	<input type="checkbox"/> Full Control - Has full control. <input type="checkbox"/> Design - Can view, add, update, delete, approve, and customize. <input type="checkbox"/> Manage Hierarchy - Can create sites and edit pages, list items, and documents. <input type="checkbox"/> Approve - Can edit and approve pages, list items, and documents. <input type="checkbox"/> Contribute - Can view, add, update, and delete. <input checked="" type="checkbox"/> Read - Can view only. <input type="checkbox"/> Restricted Read - Can view pages and documents, but cannot view historical versions or review user rights information. <input type="checkbox"/> 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.
	<p style="text-align: center;"><a href="#">Add permission settings</a></p>

To ensure the permissions settings are applied to all items in the list, check the “Assign permissions to all items” checkbox. Then click OK to apply the permissions settings. If Anthony Rodriguez logs in, the list changes. Only the item associated with his name is visible to him, and read-only, as specified in the settings page.

## Salary Information

New ▾ Actions ▾ View: **Salary Info Confiden...** ▾

<input type="radio"/> User	Employee ID	Social Security Number	Salary
<input type="radio"/> Anthony Rodriguez	RA010808PD15	632-01-1179	\$40,000.00