SharePoint Item Permission Batch

Please note that Item Permission Batch 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

Restore Default Permissions

Clicking this button will undo all changes made by either Item Permission Batch or Permission Workflow, and restore the default permissions settings specified in the list permission settings.

This will also disable the SharePointBoost Permission Workflow.
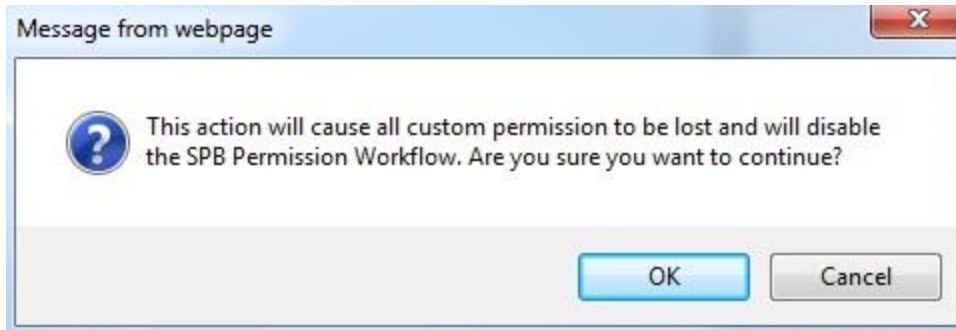
Once clicking this button a popup window will prompt the administrator to confirm and continue.

Add/Remove Permission
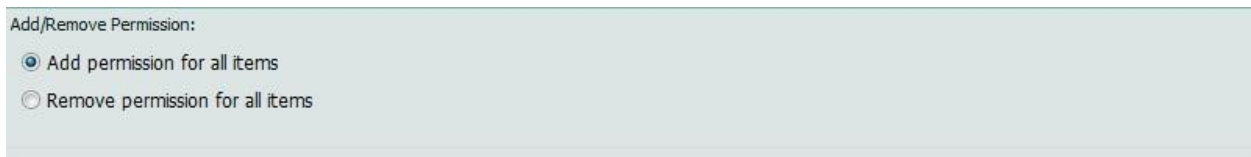
The function allows the administrator to specify whether he wants to remove or add permissions of the users specified. Thus, to remove a specific permission level the administrator has to check what permission level the user has for which item, and then select to remove this specific permission level from the user.

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. Item Permission Batch 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 of user and group names

As in previous versions, Item Permission Batch 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

As in previous versions, Item Permission Batch 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

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.

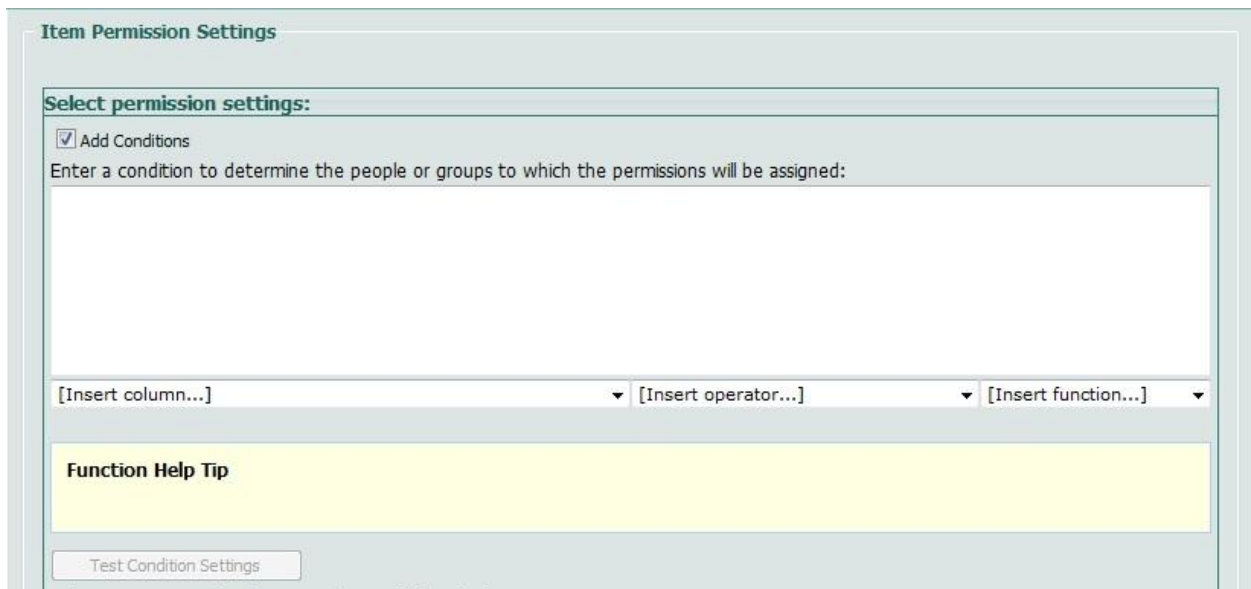*Specify Selection Criteria Based on Conditions*

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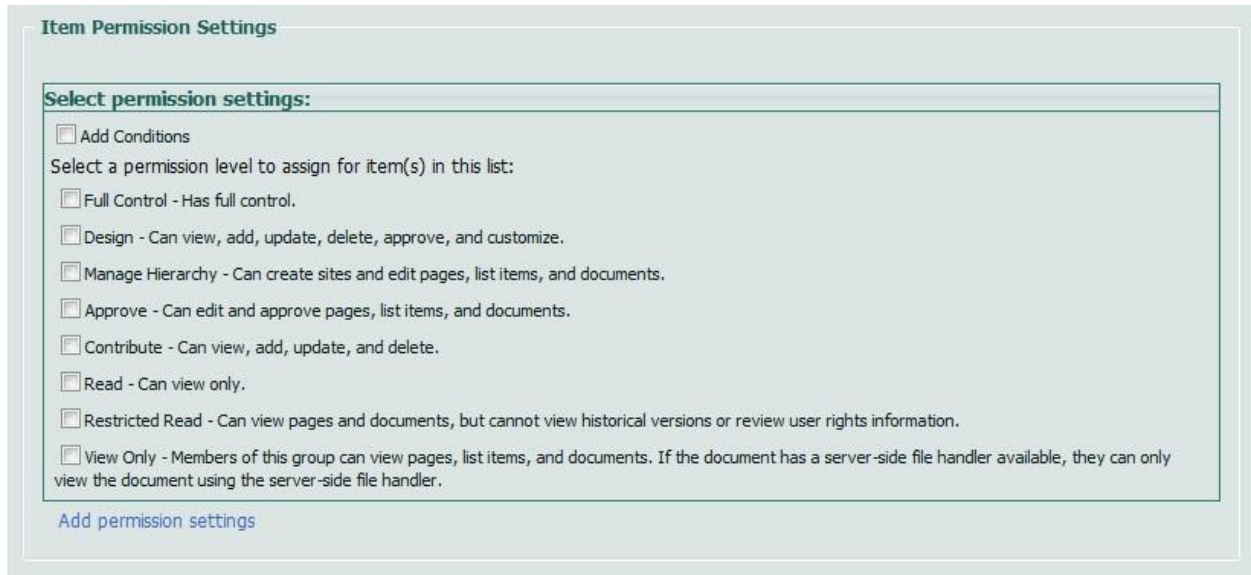
By entering conditions, the administrator can specify for which items the permissions are set. The main difference to the user selection process is that these conditions are only based on the current list. There is no reference to other lists possible. Also, the selection process is not based on any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

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

In a situation where the permissions for each item have been changed manually, changing the permissions on list level will not yield any results. The screenshot below displays the list level settings for the current list.

As the information in this list is confidential the permissions have been changed for each item. With the current setup each users can only view the item related to them, but they cannot make any changes.

This means no matter if you add or remove permissions on list level, for the items with specifically set conditions these changes would not take effect. However, the Administration Manager and the General Manager should be able to make changes and approve them. In the current set up, the administrator would have to change the permissions for every item one by one.

Item Permission Batch can solve this issue by changing the permissions of all existing items in a list. To do so click on the Item Permission Batch link in the list settings.

In the following screen the administrator can specify how to change permissions for the items.

To add permissions for the Administration Manager Item Permission Batch provides the option to look up this information for another list.

Firstly the administrator has to select the site to look up from, and then the list. Here we pull information from the same site, but instead use the list HR Management.

Further the administrator has to specify which User/Group column in this list shall be the source of the user for whom to add permissions, in this case it is the "User" column. The final step

requires filtering the information from this column based on conditions. These conditions can be based on any column in this list. Here, the condition to select the Administration Manager would look like this:

[(HR Management).Department]=="Administration"&&[(HR Management).Position]=="Manager"

Then, the administrator has to set what permissions the Administration Manager has. This can be done by simply checking the checkboxes for the desired permissions levels. In this case, the Administration Manager should have permission to Contribute.

Following the permissions settings for the Owner should be set. Here the administrator can just enter his name and specify the permission level he should have.

Add/Remove Permission:
- ◉ Add permission for all items
- ○ Remove permission for all items

Enter users/groups

Michael Peters

&✓ 📖

Choose columns containing users or user groups

☐ Display any related columns (i.e. lookup columns)

☐ User
☐ Created By
☐ Modified By

Choose user or group columns from another SharePoint list

Add users from another list

Item Permission Settings

Select permission settings:

☐ Add Conditions

Select a permission level to assign for item(s) in this list:

☐ Full Control - Has full control.

☐ Design - Can view, add, update, delete, approve, and customize.

☐ Manage Hierarchy - Can create sites and edit pages, list items, and documents.

☑ Approve - Can edit and approve pages, list items, and documents.

☐ Contribute - Can view, add, update, and delete.

☐ Read - Can view only.

☐ Restricted Read - Can view pages and documents, but cannot view historical versions or review user rights information.

☐ 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.

Add permission settings

After the changes take effect, the item permissions have changed, so that now each user has read permission for his own item, while the Administration Manger has Contribute permissions and the Owner has Approve permissions.

Permissions: RA010808PD15

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 ▾

	Users/Groups	Type	User Name	Permissions
☐	Anthony Rodriguez	User	KKK\anthony	Read
☐	Michael Peters	User	KKK\michael	Approve
☐	Rachel Jackson	User	KKK\rachel	Contribute