Permission Report 1.0

User Guide (2013)

Copyright

Copyright ©2008-2013 BoostSolutions Co., Ltd. All rights reserved.

All materials contained in this publication are protected by Copyright and no part of this publication may be reproduced, modified, displayed, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording or otherwise, without the prior written consent of BoostSolutions.

Our web site: http://www.boostsolutions.com

Contents

1. Introduction 1
2. Installation 2
   2.1 Product Files 2
   2.2 Software Requirements 3
   2.3 Server Installation 3
   2.4 Upgrade 5
   2.5 Uninstallation 5
   2.6 Command_Line Installation 5
   2.7 Feature Activation 8
3. Generate Permission Reports 9
   3.1 Entering the Permission Report page 9
   3.2 Generate an Account Permission Report 9
   3.3 Generate a Permission Level Access Report 10
   3.4 Generate a Permission Inheritance Report 11
   3.5 Generate a SharePoint Group Report 12
   3.6 Generate a Site or List Permission Report 13
   3.7 Export a Report 14
4. Contact Us 15

Appendix 1: License Management 16

ss

1. Introduction

Permission Report grants administrators with the capability to generate various SharePoint permission reports based on an account, permission level, permission inheritance and more. With these reports, it is easier for administrators to understand permission hierarchy and improve management.

This user guide is used to instruct and guide users to configure and use Permission Report.

For the latest copy of this and other guides, please visit:

http://www.boostsolutions.com/download-documentation.html

ss

2. Installation

2.1 Product Files

After you download and unzip the Permission Report zip file from www.boostsolutions.com, you will find the following files:

Path	Descriptions
Setup.exe	A program that installs and deploys the WSP solution packages to the SharePoint farm.
EULA.rtf	The product End-User-License-Agreement.
Permission Report_V1_User Guide.pdf	User guide for Permission Report in PDF format.
Library\2.0\Setup.exe	The product installer for .Net Framework 2.0.
Library\2.0\Setup.exe.config	A file containing the configuration information for the installer.
Library\4.0\Setup.exe	The product installer for .Net Framework 4.0.
Library\4.0\Setup.exe.config	A file containing the configuration information for the installer.
Solutions\Foundtion\ BoostSolutions.FoundationSetup12.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2007 or WSS 3.0.
Solutions\Foundtion\ BoostSolutions.FoundationSetup14.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\Foundtion\ BoostSolutions.FoundationSetup15.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Foundtion\Install.config	A file containing the configuration information for the installer.
Solutions\PermissionChecker\ BoostSolutions.PermissionReportSetup12.1.wsp	A SharePoint solution package containing Permission Report files and resources for SharePoint 2007 or Windows SharePoint Services 3.0.
Solutions\PermissionChecker\	A SharePoint solution package containing

BoostSolutions.PermissionReportSetup14.1.wsp	Permission Report files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\PermissionChecker\ BoostSolutions.PermissionReportSetup15.1.wsp	A SharePoint solution package containing Permission Report files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\PermissionChecker\Install.config	A file containing the configuration information for the installer.

2.2 Software Requirements

Before you install Permission Report, ensure your system meets the following requirements:

SharePoint 2013

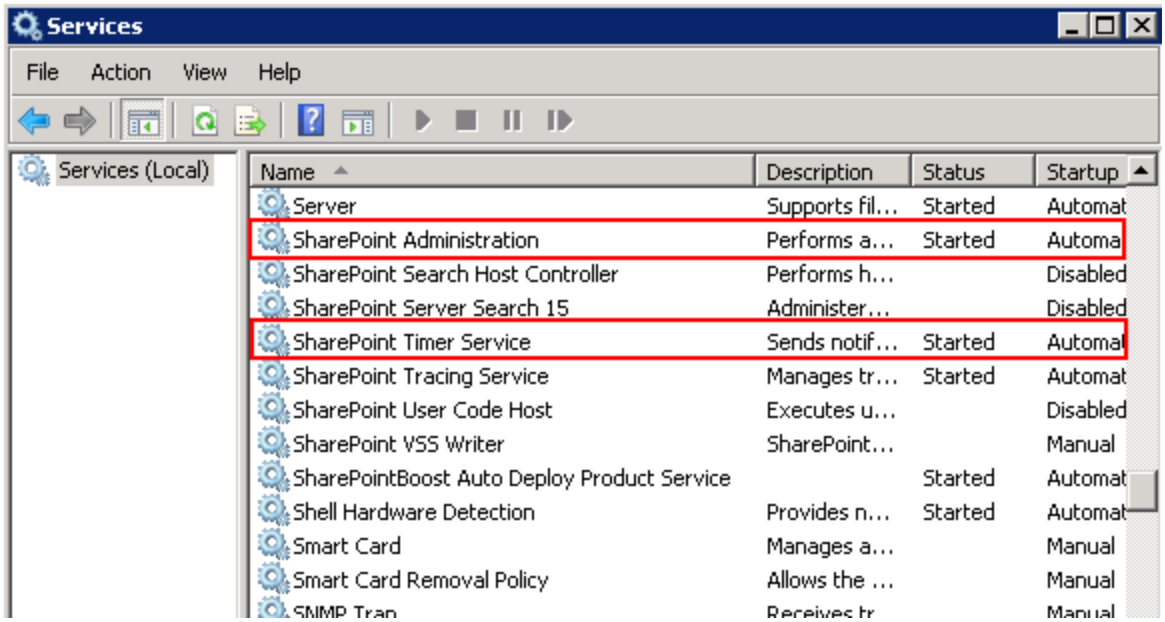
Operating System	Microsoft Windows Server 2012 Standard or Datacenter X64 Microsoft Windows Server 2008 R2 SP1
Server	Microsoft SharePoint Foundation 2013 or Microsoft SharePoint Server 2013 Microsoft .NET Framework 4.5
Browser	Microsoft Internet Explorer 8 or above Mozilla Firefox Google Chrome

2.3 Server Installation

Follow these steps to install Permission Report on your SharePoint servers.

Installation Preconditions

Before you start installing the product, please make sure these services are started on your SharePoint servers: **SharePoint Administration** and **SharePoint Timer Service**.



Permission Report must be run on one front-end Web server in the SharePoint farm where **Microsoft SharePoint Foundation Web Application services** are running. Check **Central Administration** → **System Settings** for a list of servers running this service.

Required Permissions

To perform this procedure, you must have specific permissions and rights.

- Member of the local server's **Administrators** group.
- Member of the **Farm Administrators** group.

To install Permission Report on SharePoint server.

a. Download the zip file (*.zip) for Permission Report from the BoostSolutions website, then extract the file.

b. Open the created folder and run the **Setup.exe** file.

> ***Note***
>
> If you cannot run the setup file, please right click the **Setup.exe** file and choose Run as administrator.

c. A system check is performed to verify if your machine meets all the requirements for installing the product. After the system check is finished, click **Next**.

d. Review and accept the End-User License Agreement and click **Next**.

e. In the **Web Application Deployment Targets**, select the web applications you are going to install and click **Next**.

> ***Note***
>
> If you select **Automatically activate features**, the product features will be activated in the target site collection during the installation process. If you want to manually activate the product feature later, uncheck this box.

f. Upon completion of the installation, details are displayed showing which web applications Permission Report has been installed to. Click **Close**.

2.4 Upgrade

Download the latest version of Permission Report and run the **Setup.exe** file.

In the **Program Maintenance** window, select **Upgrade** and click **Next**.

2.5 Uninstallation

If you want to uninstall Permission Report, double-click the **Setup.exe** file.

In the **Repair or Remove** window, select **Remove** and click **Next**. Then the application will be removed.

2.6 Command_Line Installation

The following instructions are for installing the solution files for Permission Report using the SharePoint STSADM command line tool.

Required permissions

To use STSADM, you must be a member of the local Administrators group on the server.

To install Permission Report to SharePoint servers.

a. Extract the files from the product zip pack to a folder on one SharePoint server.

b. Open a command prompt and make sure your path is set with the SharePoint bin directory.

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\15\BIN

c. Add the solution files to SharePoint in the STSADM command line tool.

```
stsadm -o addsolution -filename BoostSolutions.PermissionReportSetup15.1.wsp
```

stsadm -o addsolution -filename BoostSolutions.FoundationSetup15.1.wsp

d. Deploy the added solution with the following command:

stsadm -o deploysolution -name BoostSolutions.PermissionReportSetup15.1.wsp -allowgacdeployment –url [virtual server url] –immediate

stsadm -o deploysolution -name BoostSolutions.FoundationSetup15.1.wsp -allowgacdeployment –url [virtual server url] –immediate

e. Wait for the deployment to complete. Check the final status of the deployment with this command:

stsadm -o displaysolution -name BoostSolutions.PermissionReportSetup15.1.wsp

stsadm -o displaysolution -name BoostSolutions.FoundationSetup15.1.wsp

The result should contain a <Deployed> parameter for which the value is TRUE.

Note:

After install product using command line, you can check whether the product is installed and deployed successfully in Central Administration.

a. On the Central Administration Home page, click **System Settings**.

b. In the Farm Management section, click **Manage farm solutions**.

c. On the Solution Management page, check whether the solution "boostsolutions.permissionreportsetup15.1.wsp" is deployed to the web applications.

d. On the Solution Properties page, click **Deploy Solution**.

e. On the Deploy Solution page, in the Deploy When section, select **Now**.

f. In the Deploy To? section, in the A specific web application list, click either All web applications or select a specific Web application.

g. Click **OK**.

To remove Permission Report from SharePoint servers.

a. Removal is initiated with the following command:

stsadm -o retractsolution -name BoostSolutions.PermissionReportSetup15.1.wsp -immediate -url

[virtual server url]

b. Wait for the removal to finish. To check the final status of the removal you can use the following command:

stsadm -o displaysolution -name BoostSolutions.PermissionReportSetup15.1.wsp

The result should contain the <Deployed> parameter for which the value is FALSE and the <LastOperationResult> parameter with the RetractionSucceeded value.

c. Remove the solution from the SharePoint solutions storage:

stsadm -o deletesolution -name BoostSolutions.PermissionReportSetup15.1.wsp

Note:

After uninstall product using command line, you can check whether the product is removed and successfully in Central Administration.

a. On the Central Administration Home page, click **System Settings**.

b. In the Farm Management section, click **Manage farm solutions**.

c. On the Solution Management page, click "boostsolutions.permissionreportsetup15.1.wsp".

d. On the Solution Properties page, click **Retract Solution**.

e. On the Retract Solution page, in the Deploy When section, select **Now**.

f. In the Retract From section, in the A specific web application list, click All content web applications.

g. Click **OK**.

h. Wait a minute, and refresh the browser until you see "Not Deployed" as the status for "boostsolutions.permissionreportsetup15.1.wsp".

i. Select "boostsolutions.permissionreportsetup15.1.wsp".

j. On the Solution Properties page, click **Remove Solution**.

To remove BoostSolutions Foundation from SharePoint servers.

The BoostSolutions Foundation is designed to provide a centralized interface to manage licenses for all BoostSolutions software from within SharePoint Central Administration. If are still using BoostSolutions product on your SharePoint server, DO NOT remove Foundation from the servers.

a. Removal is initiated with the following command:

```
stsadm -o retractsolution -name BoostSolutions.FoundationSetup15.1.wsp –immediate –url [virtual server url]
```

b. Wait for the removal to finish. To check the final status of the removal you can use the following command:

```
stsadm -o displaysolution -name BoostSolutions.FoundationSetup15.1.wsp
```

The result should contain the <Deployed> parameter for which the value is FALSE and the <LastOperationResult> parameter with the RetractionSucceeded value.

c. Remove the solution from the SharePoint solutions storage:

```
stsadm -o deletesolution -name BoostSolutions.FoundationSetup15.1.wsp
```

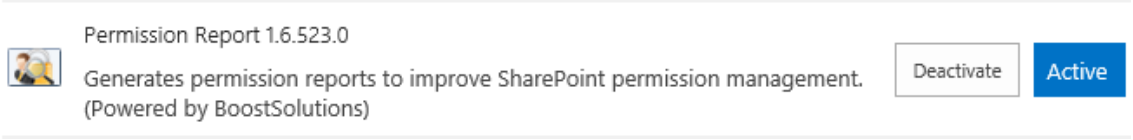
2.7 Feature Activation

By default, the application's features are automatically activated once the product is installed. You can also activate the product feature manually.

a. Select Settings and then select **Site Settings**.

b. Under **Site Collection Administration** click **Site collection features**.

c. Find the application feature and click **Activate**. After a feature is activated, the Status column lists the feature as **Active**.

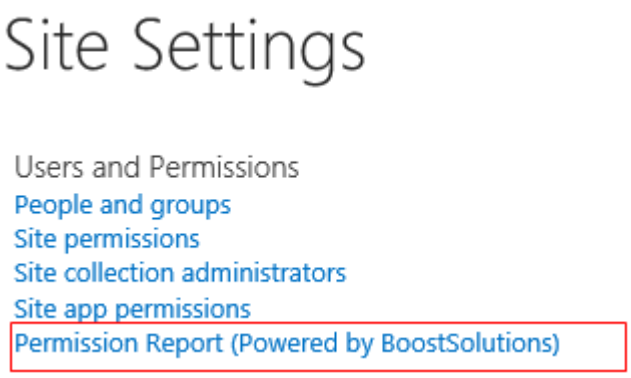


3. Generate Permission Reports

3.1 Entering the Permission Report page

a. Select Settings and then select **Site Settings**.

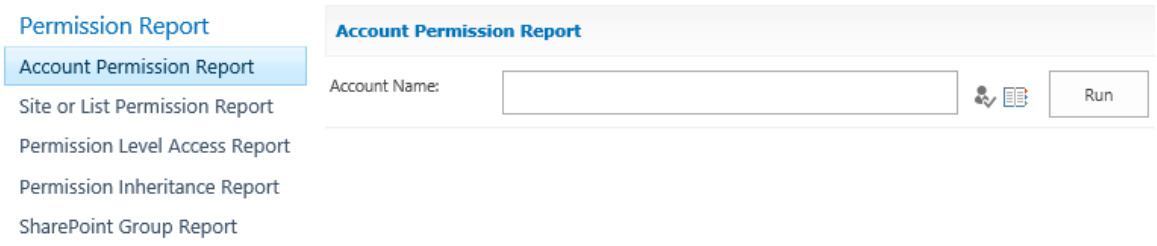
b. Under the **Users and Permissions** section, click **Permission Report (Powered by SharePoint Boost)** to enter the product page.



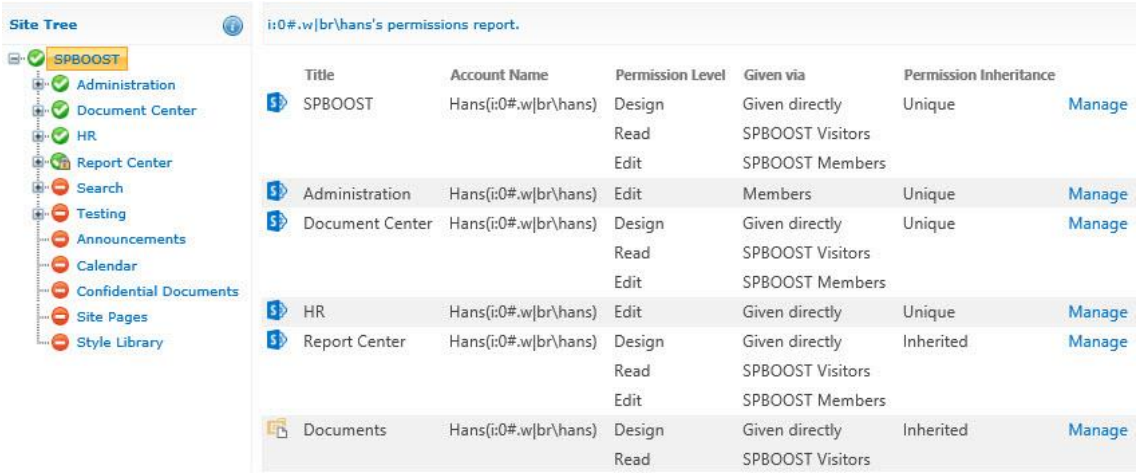
3.2 Generate an Account Permission Report

This feature enables you generate a permission report based on a specific SharePoint group or user. The report includes the accounts' permissions on site and list level, but does not include permissions on item level.

a. On the Permission Report page, click **Account Permission Report**.



b. In the **Account Name** box, enter a user or group name and then click **Run**. A report will be generated.



The following icons represent an account's permissions for sites or lists:

The account has inherited permissions in the specified scope.

The account has unique permissions in the specified scope.

The permission is inherited but this account does not have permissions in the specified scope.

The permission is unique but this account does not have permissions in the specified scope.

The permission is inherited, but the current logon user has insufficient permissions to check permissions.

The permission is unique, but the current logon user has insufficient permissions to check permissions.

c. To view the specified account's permissions on other sites or lists, select a site or list from the **Site Tree** on the left.

d. Only 30 permission items are displayed per page. Click **Previous** or **Next** to view more items.

e. To modify a user's permissions, click **Manage** to enter the permission settings page.

3.3 Generate a Permission Level Access Report

This feature enables you to check which users or groups have specified permission levels, for example, you can check which users have full control permission levels.

Note, this report only lists users or groups who are directly granted specific permissions, permissions inherited from SharePoint groups are not listed.

a. On the Permission Report page, click **Permission Level Access Report**.

b. Select a permission level from the drop-down list, which will contain all site collection permission levels.

c. Click **Run** to generate a report.

Users or groups given the selected permission level "Design".

Title	Account Name	Permission Level	Given via	Permission Inheritance	
SPBOOST	Hans(i:0#.w|br\hans)	Design	Given directly	Unique	Manage
	Site Desingers	Design	Given directly		
Administration	Designers	Design	Given directly	Unique	Manage
	Henry(i:0#.w|br\henry)	Design	Given directly		
Document Center	Hans(i:0#.w|br\hans)	Design	Given directly	Unique	Manage
	BR\document team	Design	Given directly		
HR	HR Managers	Design	Given directly	Unique	Manage
	Cecilia Wen(i:0#.w|br\cw)	Design	Given directly		
Report Center	Hans(i:0#.w|br\hans)	Design	Given directly	Inherited	Manage
	Site Desingers	Design	Given directly		
Documents	Hans(i:0#.w|br\hans)	Design	Given directly	Inherited	Manage
	Site Desingers	Design	Given directly		
Site Assets	Hans(i:0#.w|br\hans)	Design	Given directly	Inherited	Manage
	Site Desingers	Design	Given directly		
Site Pages	Hans(i:0#.w|br\hans)	Design	Given directly	Inherited	Manage
	Site Desingers	Design	Given directly		

d. To view permission level access on other sites, select the site in the **Site Tree**.

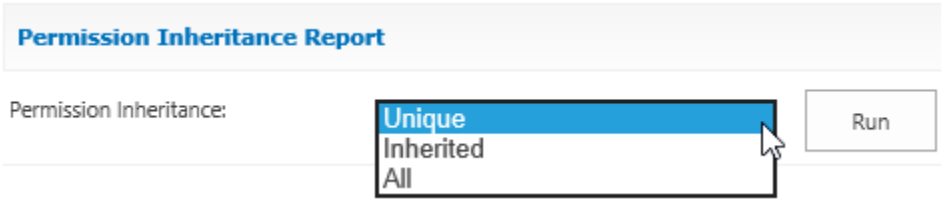
e. To manage permissions, click **Manage** to enter the site or list permission settings page.

3.4 Generate a Permission Inheritance Report

This feature generates a permission hierarchy report of sites and lists. It enables you to view all contents permissions on one page without enter individual objects.

a. On the Permission Report page, click **Permission Inheritance Report**.

b. Select one type of permission inheritance, such as **Unique**, and click **Run**.



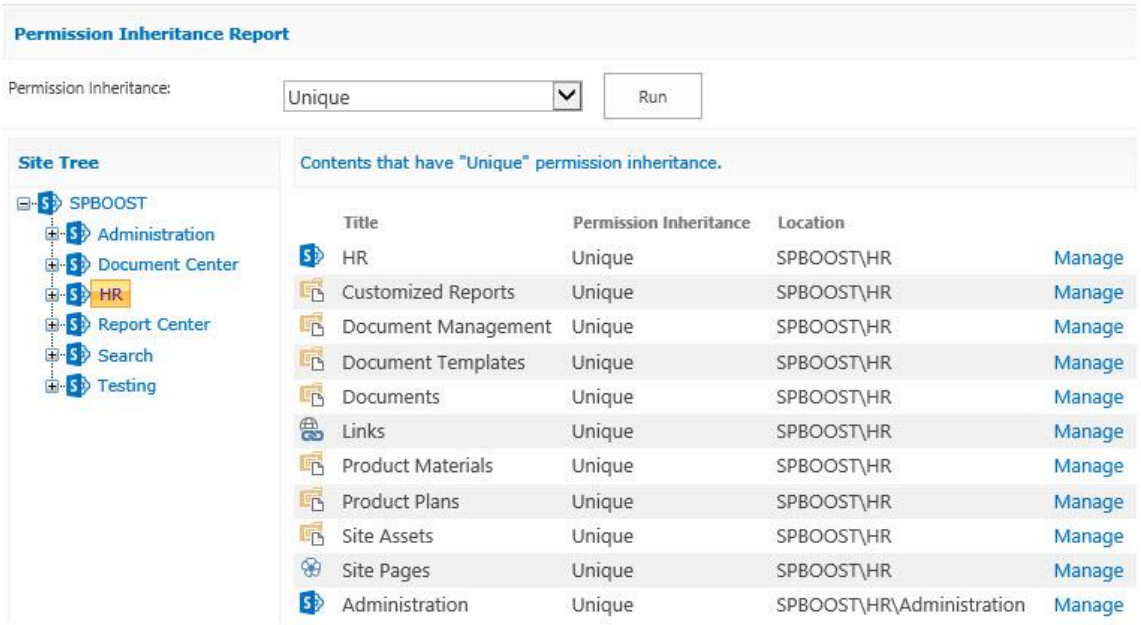
There are three choices to help administrators generate a Permission Inheritance Report:

Unique: Generates a report that only shows sites or lists where permissions are unique.

Inherited: Generates a report that only shows sites or lists where permissions are inherited.

All: Generates a report that shows all contents permissions, including unique and inherited.

c. To view permission inheritance in other sites, just select the site in the **Site Tree**.

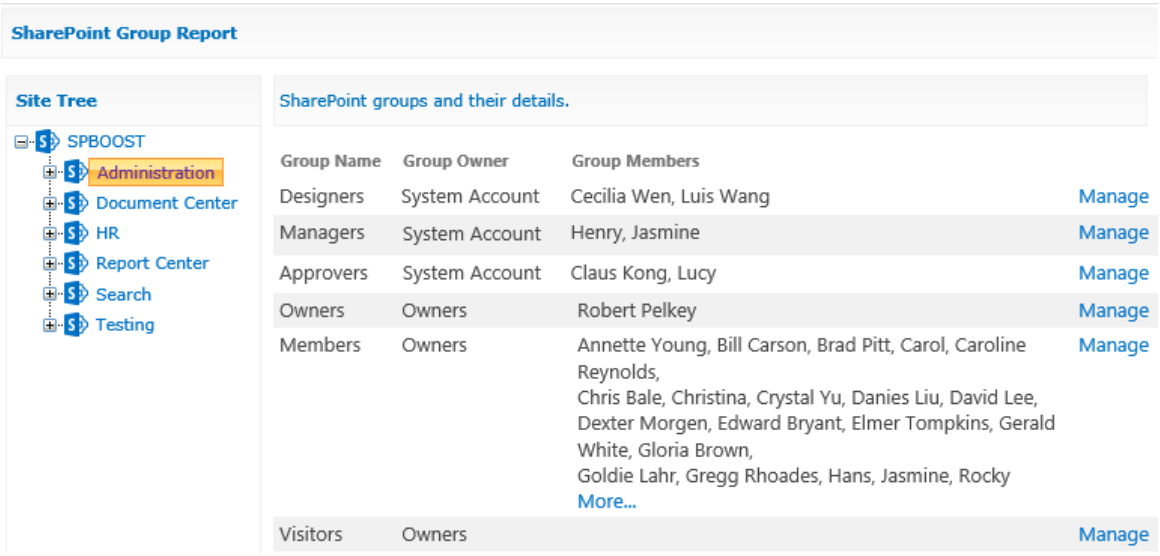


d. To change the permission, click **Manage**.

3.5 Generate a SharePoint Group Report

a. To generate this report, click **SharePoint Group Report**.

b. In this report, administrators can locate additional SharePoint groups in other sites by selecting one on the **Site Tree**.

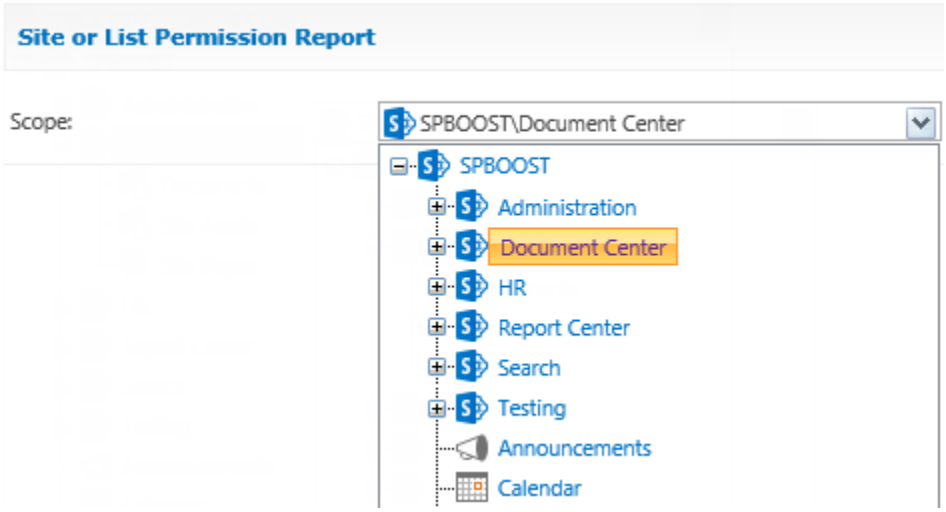


Only 20 group members will be shown for each group in the report. To view more members, click **More...** to enter a group's page.

3.6 Generate a Site or List Permission Report

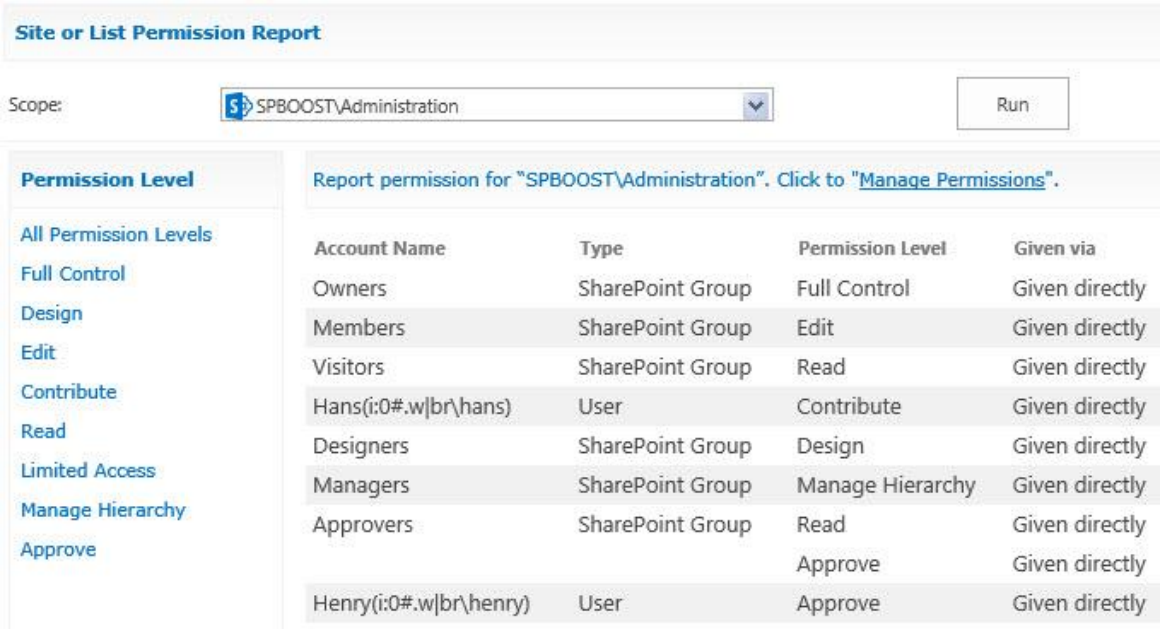
a. On the Permission Report page, click **Site or List Permission Report**.

b. Open the Scope drop-down list, select a site or list and then click **Run**.



c. The site or list permission report will then be generated.

d. In the report, a **Permission Level** filter is provided to filter the site or list permission report. These permission levels are pulled from the site collection. To filter a report, just select the desired permission level.



e. Additionally, administrators can enter the site or list permissions settings page by clicking **Manage Permissions**.

3.7 Export a Report

The Export function saves reports as an excel file. After a report is generated, the Export function becomes available.

To export reports, click the **Export** button on the ribbon menu. In the popup window, administrators can then save the report to a location of their choosing.

4. Contact Us

Troubleshooting FAQ:

http://www.boostsolutions.com/general-faq.html#Show=ChildTitle9

Contact Info:

Product & Licensing Inquires: sales@boostsolutions.com

Technical Support (Basic): support@boostsolutions.com

Request a New Product or Feature: feature_request@boostsolutions.com

Live chat:

http://www.boostsolutions.com/support/chat/livezilla.php?intgroup=U3VwcG9ydA==&reset=true

Appendix 1: License Management

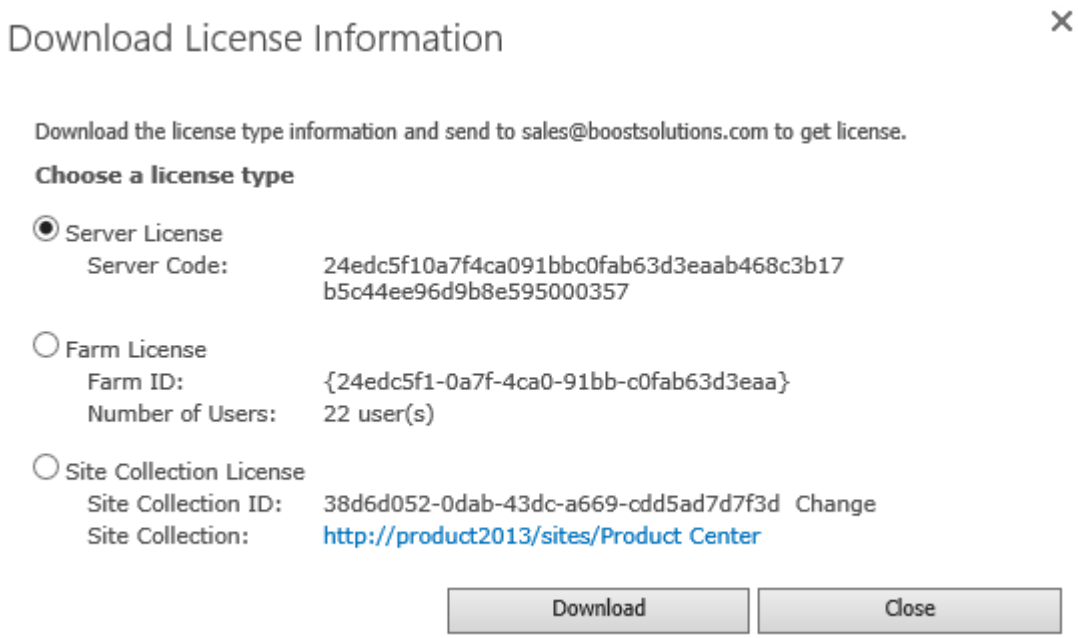
You can use Permission Report without entering any license code for a period of 30 days from when you first use it.

To use product without limitation, you will need to purchase a license and register the product.

Finding License Information

a. In the products main page, click the trial link and enter the License Management Center.

b. Click Download License Information, choose a license type and download the information (Server Code, Farm ID or Site Collection ID).



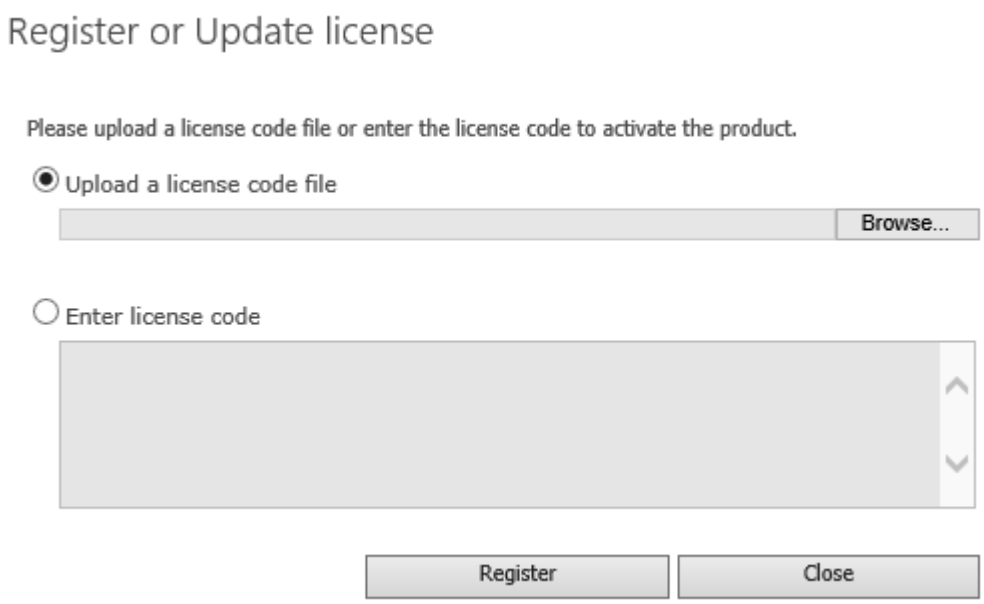
In order for BoostSolutions to create a license for you, you MUST send us your SharePoint environment identifier (Note: different license types need different information). A server license needs a server code; a Farm license needs a farm ID; and a site collection license needs a site collection ID.

c. Send the above information to us (sales@boostsolutions.com) to generate a license code.

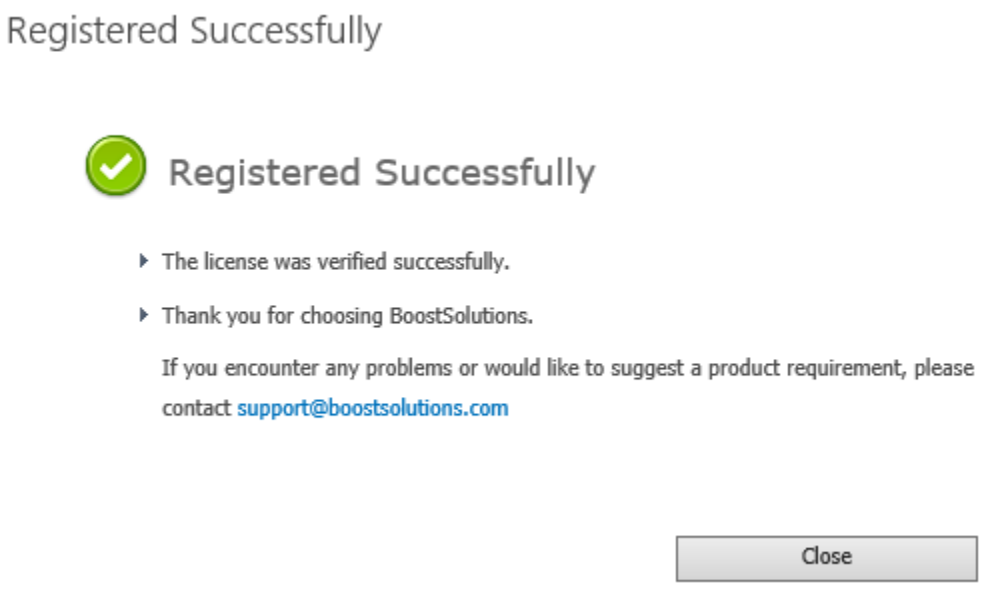
License Registration

a. When you receive a product license code, enter the **License Management Center** page.

b. Click **Register** on the license page and a **Register or Update license** window will open.



c. Upload the license file or enter the license code and click **Register**. You will get confirmation that your license has been validated. ss



For more details on license management, see the BoostSolutions Foundation.