



Permission Workflow 4.0

User Guide (2013)

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

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1. Introduction

Organizations generate a number of documents every day and some may contain sensitive information. Permission Workflow provides an effective way to control a users' access to documents and allows you to automatically control who can access these documents according to the metadata.

Permission Workflow contains the following features:

- Automatically assign permissions to users or groups by workflow
- Assign permissions based on conditions
- Assign permissions based on content types
- Dynamically assign permissions to users or groups by user columns
- Import or export permission workflow settings
- Preview permission workflow part settings

This user guide will show you how to install, configure and use Permission Workflow on your SharePoint 2013 environment.

For the latest copy of this user guide and other user guides, please visit our document center at:

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

2. Installation

2.1 Product Files

After you download and unzip the Permission Workflow 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.
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\Foundation\ BoostSolutions.FoundationSetup12.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2007 or WSS 3.0.
Solutions\Foundation\ BoostSolutions.FoundationSetup14.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\Foundation\ BoostSolutions.FoundationSetup15.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Foundation\Install.config	A file containing the configuration information for the installer.
Solutions\PermissionWorkflow\ BoostSolutions.PermissionWorkflowSetup14.4.wsp	A SharePoint solution package containing Permission Workflow files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\PermissionWorkflow\ BoostSolutions.PermissionWorkflowSetup15.4.wsp	A SharePoint solution package containing Permission Workflow files and resources for SharePoint 2013 or SharePoint Foundation 2013.

Solutions\PermissionWorkflow\Install.config	A file containing the configuration information for the installer.
---------------------------------------------	--------------------------------------------------------------------

2.2 Software Requirements

Before you install Permission Workflow, 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

SharePoint 2010

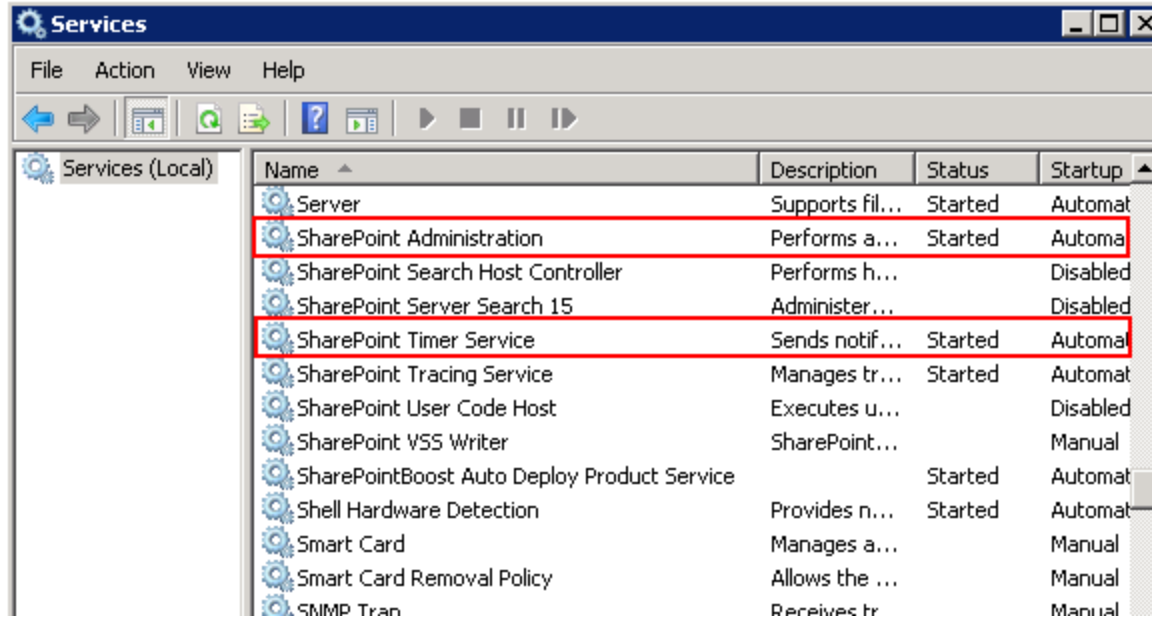
Operating System	Microsoft Windows Server 2008 x64 Microsoft Windows Server 2008 R2
Server	Microsoft SharePoint Foundation 2010 or Microsoft SharePoint Server 2010 Microsoft SharePoint Foundation 2010 SP1 or Microsoft SharePoint Server 2010 SP1 Microsoft .NET Framework 3.5
Browser	Microsoft Internet Explorer 7 or above Mozilla Firefox Google Chrome

2.3 Server Installation

Follow these steps to install Permission Workflow 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 Workflow 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 Workflow on SharePoint server.

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

- 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**.
- Review and accept the End-User License Agreement and click **Next**.
- 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 Workflow has been installed to. Click **Close**.

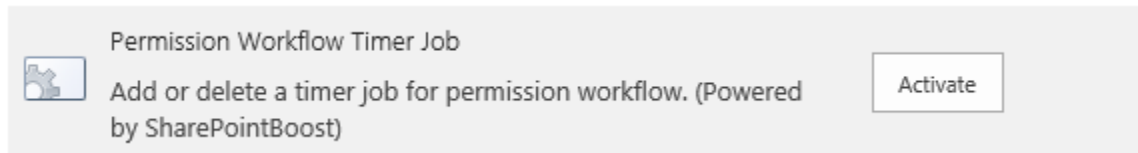
2.4 Upgrade

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

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

2.5 Uninstallation

Before uninstall product, you need to deactivate the AD Information Sync Timer Job on all web application.



And then 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 Workflow 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 Workflow 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.

- **SharePoint 2013**

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.PermissionWorkflowSetup15.4.wsp
stsadm -o addsolution -filename BoostSolutions.FoundationSetup15.1.wsp
```

- d. Deploy the added solution with the following command:

```
stsadm -o deploysolution -name BoostSolutions.PermissionWorkflowSetup15.4.wsp -
allowgacdeployment -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.PermissionWorkflowSetup15.4.wsp
stsadm -o displaysolution -name BoostSolutions.FoundationSetup15.1.wsp
```

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

- f. In the STSADM tool, activate the features.

```
stsadm -o activatefeature -name SharePointBoost.PermissionWorkflow -url [site collection url] -
force
stsadm -o activatefeature -name SharePointBoost.PermissionWorkflow.TimerJob -url [site
collection url] -force
```

Note:

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

- On the Central Administration Home page, click **System Settings**.
- In the Farm Management section, click **Manage farm solutions**.
- On the Solution Management page, check whether the solution "boostsolutions.permissionworkflowsetup15.4.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 Workflow from SharePoint servers.

- a. Removal is initiated with the following command:

```
stsadm -o retractsolution -name BoostSolutions.PermissionWorkflowSetup15.4.wsp -immediate
```

- 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.PermissionWorkflowSetup15.4.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.PermissionWorkflowSetup15.4.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.permissionworkflowsetup15.4.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.adinformationsyncsetup15.3.wsp.
- i. Select "boostsolutions.permissionworkflowsetup15.4.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

Activate features in site collection

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

- a. Go to > **Site Settings** > **Site Collection Administration** > **Site collection features**.
- b. Find the application feature and click **Activate**. After a feature is activated, the Status column lists the feature as **Active**.




BoostSolutions Permission Workflow 4.8.814.0
Automatically assign the permission settings for items as they are created or modified. (Powered by BoostSolutions)

Deactivate Active

Activate Permission Workflow's Feature in Central Administration

- a. On the Quick Launch, click **Applications Management**.
- b. On the Application Management page, under Web Applications, click **Manage Web Applications**.
- c. Select a web application you want to configure and click **Manage Features** on the ribbon.
- d. Find Permission Workflow's feature and click **Activate**. After a feature is activated, the Status column lists the feature as **Active**.



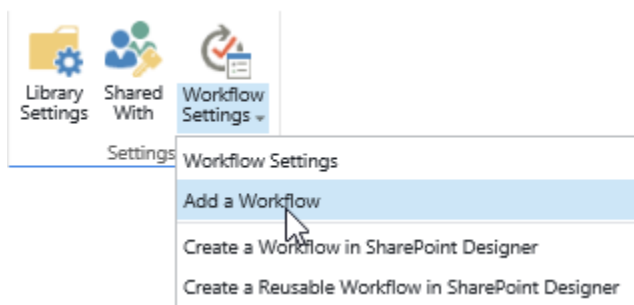
Permission Workflow Timer Job
Add or delete a timer job for permission workflow. (Powered by SharePointBoost)

Deactivate Active

3. Manage Permission Workflow

3.1 Enter Permission Workflow Settings Page

- a. Navigate to the list or library where you want to configure Permission Workflow settings.
- b. On the Ribbon, click the **List** or **Library** tab and then click **Add a Workflow** in the Settings group.



Or, enter the List or Library Settings page and under the **Permissions and Management** section, click **Workflow Settings**.

- c. On the **Add a Workflow** page, select the **BoostSolutions Permission Workflow** from the workflow template list.

Workflow

Select a workflow to add to this document library. If a workflow is missing from the list, your site administrator may have to publish or activate it

Select a workflow template:

- BoostSolutions Permission Workflow
- Disposition Approval
- Three-state

Description:

Automatically assign permissions to individual items as they are created or modified.

If you can't find BoostSolutions Permission Workflow in the template box, please check the product feature in Site Collection Features page and make sure the feature is activated.

- d. Give your workflow a name and then select a task list and history list for it.
- e. Tick the **Creating a new item will start this workflow** and **Changing an item will start this workflow** checkboxes if you wish to start this workflow automatically.

- f. Click **Next** to enter the workflow settings page.

3.2 Enable/Disable Permission Workflow

Permission Workflow provides an easy way to decide if the workflow works on the list or library. If you enable the workflow, then it will run and apply the permission settings to the contents in the list or library.

Permission Workflow 

If you disable the permission workflow, then it will not run on the list.

Permission Workflow 

3.3 Create a Permission Part

A permission part is a set of commands and conditions set by an administrator for automatic permissions assignment for items or documents.

A permission part contains the following:

Permission Part Name: An identifier for a permission part; it should be unique.

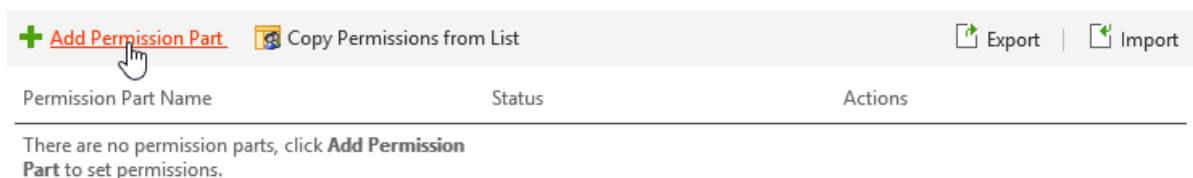
Include Users: The users or groups whom the permission should be assigned to.

Permission Settings: Permissions will be assigned to these users or groups.

Apply Permissions to: The content type which permissions will be applied to.

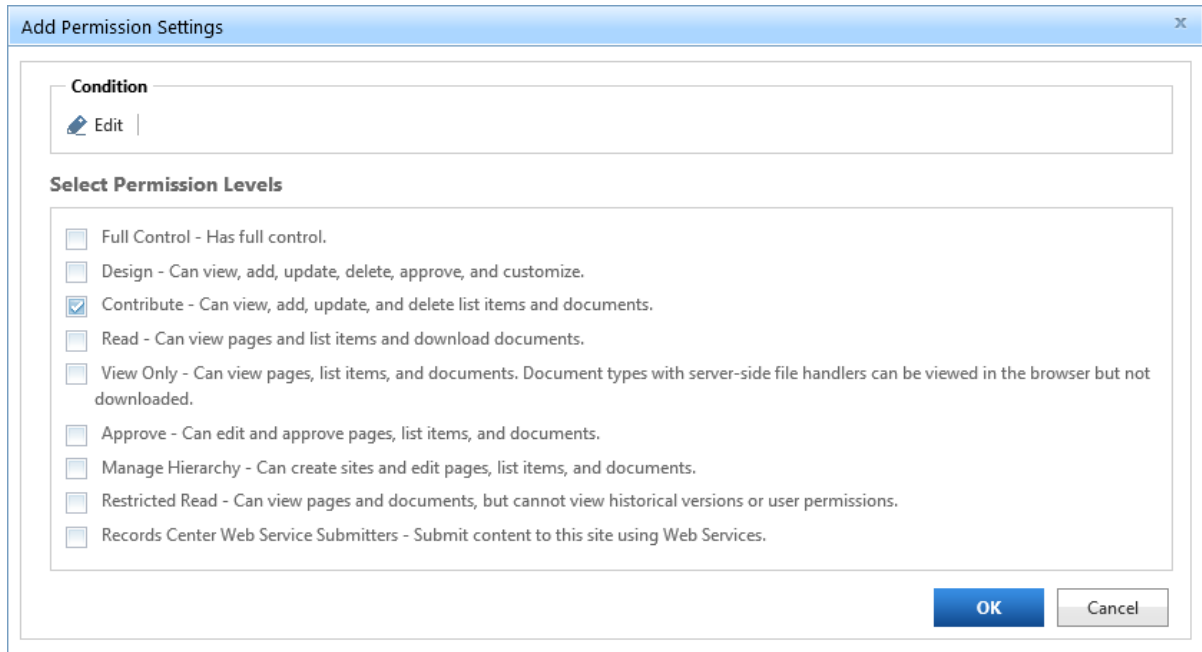
Follow these steps to create a permission part:

- a. On the Permission Workflow page, click **Add Permission Part**.



- b. On the Add Permission Part page, enter a unique name in the **Permission Part Name** section.
- c. In the **Include Users** section, specify the users or groups (see section [3.3.1 Assign Permissions to Specific Users](#) and section [3.3.2 Assign Permissions to Users Dynamically](#)).

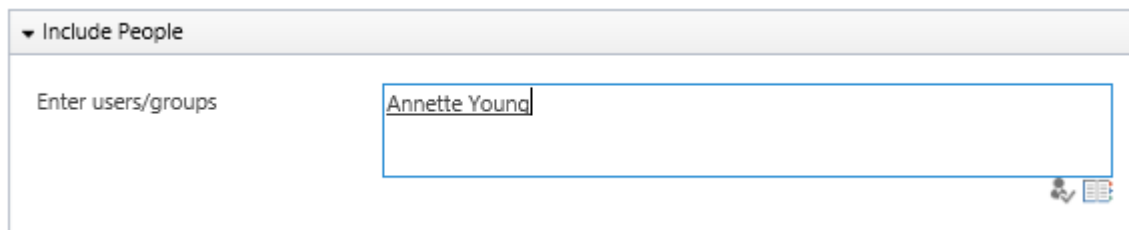
- d. In the **Permission Setting** section, click **Add Permissions Settings** and then select at least one permission level that you want to assign to the specified users selected in the previous step (see section [3.3.3 Assign Permissions According to Metadata](#)).



- e. In the **Apply Permissions to** section, select content type that permissions will be applied to (see section [3.3.4 Assign Permissions Based on Content Type](#)).
- f. Click **Preview** to see the permission part settings or click **OK** to save the permission part.
- g. On the Permission Workflow page, click **OK** to start the workflow on the list.

3.3.1 Assign Permissions to Specific Users

To assign permission to specific users and groups enter the users or groups' name in the **Enter users/groups** box. You can use the Check Names function under the Enter users/group box to check if you entered a name correctly. If you do not know the exact name of the user or group, you can use the browse function found under the Enter users/group box to search for a user or group. Multiple entries are separated with a semicolon.



3.3.2 Assign Permissions to Users Dynamically

Assign Permissions to User Columns in the Current or Related List

You may need to give users or groups' permission dynamically instead of specifically, for example, you need to use 'Assign to' so specific users can access their tasks.

Permission Workflow allows you to assign permissions to users or groups based on user/group columns.

To Assign Permissions to User Columns in the Current or Related List:

- In the **Include Users** section, click on **Select more users**.
- In the **Choose User/Group Columns** section, select one or more user or group columns in the current list.

Choose User/Group Columns Show user/group columns in other lists related to lookup columns in this list

- | | |
|-------------------------------------|------------------|
| <input checked="" type="checkbox"/> | Assigned To |
| <input type="checkbox"/> | Person in charge |
| <input type="checkbox"/> | Created By |
| <input type="checkbox"/> | Modified By |

- To give permissions to user or group columns in the lookup list, choose the **Show user/group columns in other lists related to lookup columns in this list** option. Columns will be shown as List.Column format.

Choose User/Group Columns Show user/group columns in other lists related to lookup columns in this list

- | | |
|-------------------------------------|-------------------------------|
| <input checked="" type="checkbox"/> | Assigned To |
| <input type="checkbox"/> | Person in charge |
| <input type="checkbox"/> | Created By |
| <input type="checkbox"/> | Modified By |
| <input checked="" type="checkbox"/> | Predecessors.Assigned To |
| <input checked="" type="checkbox"/> | Predecessors.Person in charge |
| <input type="checkbox"/> | Predecessors.Created By |
| <input type="checkbox"/> | Predecessors.Modified By |

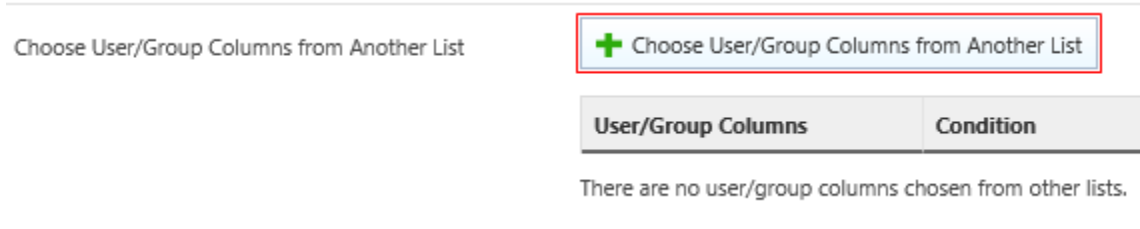
- Select the user or group columns from the lookup list.

Assign Permissions to User Columns in External List

Use this feature when you need to assign permissions to filtered users or groups based on conditions. For example, you may only want managers to approve requests.

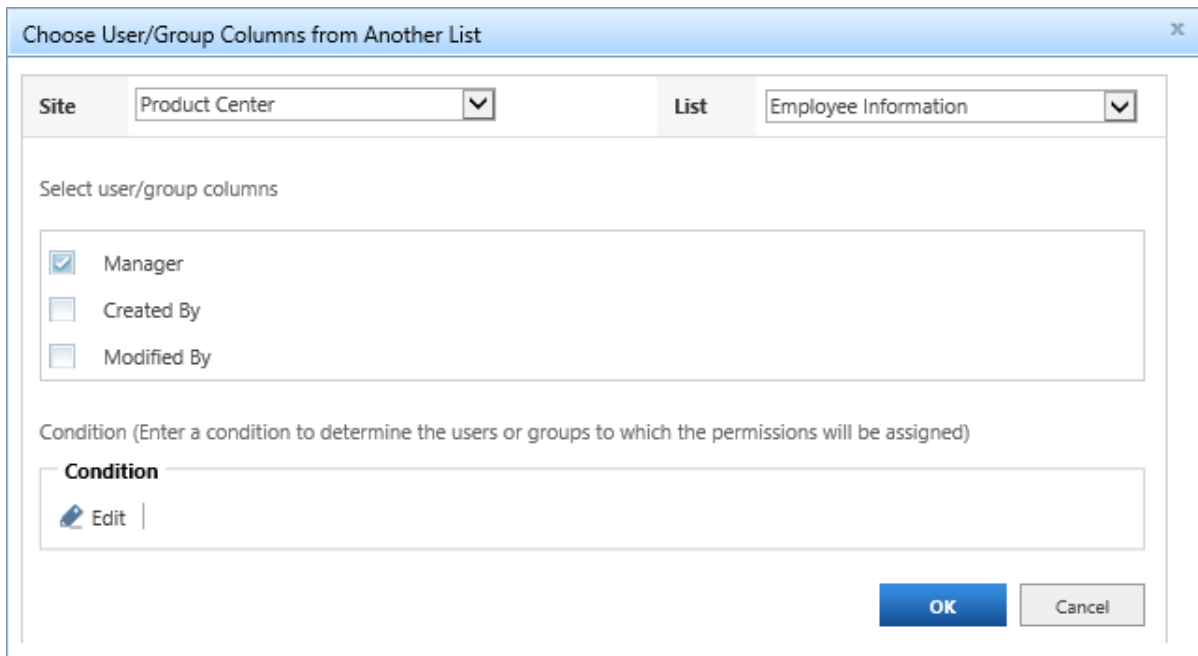
To Assign Permissions to User Columns in External List:

- a. On the Add/Modify Permission Part page, in the Include Users section click **Select more users**.
- b. In the Choose User/Group Columns section, click **Choose User/Group Columns from Another List**.



The screenshot shows a dialog box titled "Choose User/Group Columns from Another List". On the left, there is a text label "Choose User/Group Columns from Another List". To its right is a button with a green plus icon and the text "Choose User/Group Columns from Another List", which is highlighted with a red rectangular border. Below the button is a table with two columns: "User/Group Columns" and "Condition". The table is currently empty, and below it, the text "There are no user/group columns chosen from other lists." is displayed.

- c. Select the site and list and then select the user or group columns.



The screenshot shows the "Choose User/Group Columns from Another List" dialog box with the following settings:

- Site:** Product Center (selected in a dropdown menu)
- List:** Employee Information (selected in a dropdown menu)
- Select user/group columns:** A list of three items: "Manager" (checked), "Created By" (unchecked), and "Modified By" (unchecked).
- Condition:** A text area with the label "Condition (Enter a condition to determine the users or groups to which the permissions will be assigned)". Below the text area is an "Edit" button with a pencil icon.
- Buttons:** "OK" and "Cancel" buttons are located at the bottom right.

- d. Click the Edit command to open the Condition editor. Specify conditions to filter users or groups.

- e. Click **OK** to save the conditions and **OK** again to save the **Choose User/Group Columns from Another List** settings.

Choose User/Group Columns from Another List + Choose User/Group Columns from Another List

User/Group Columns	Condition	Actions
Site: Product Center List: Employee Information User Columns: Manager	[(Employee Information).Department] == "Marketing"	<div style="text-align: right;"> <input type="button" value="Edit"/> <input type="button" value="Delete"/> </div>

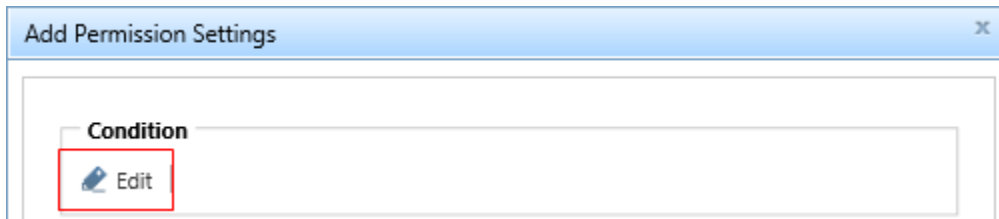
3.3.3 Assign Permissions According to Metadata

By setting proper conditions, you can govern items or documents permissions according to metadata.

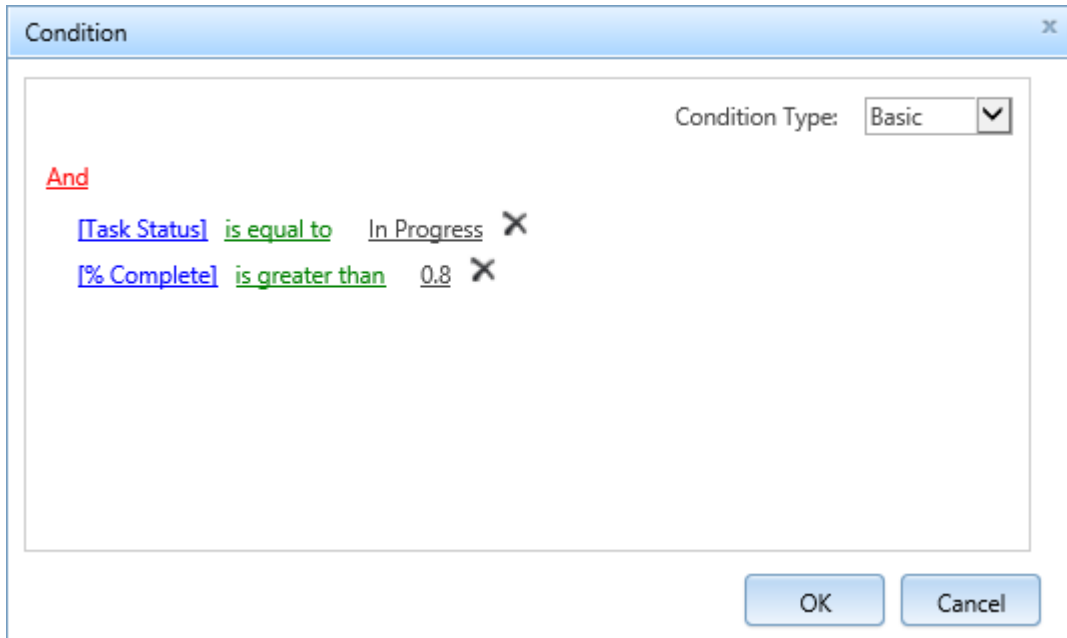
To configure a condition in the permission part:

- a. On the Add/Modify Permission Part page, in Permission Settings section click **Add Permission Settings**.

- b. In the Add Permission Settings dialog, click **Edit** to create a condition.



- c. In the Condition editor, compose the condition with metadata.



Two condition types are provided in the settings page, Basic and Advanced.

Basic conditions help administrators to easily configure conditions.

Advanced conditions provide more operators and functions to implement elaborate conditions beyond what is found in basic conditions.

For further reference, please refer to BoostSolutions [Condition Editor User Guide](#).

- d. Click **OK** to save conditions.
- e. After returning to the Add Permission Settings dialog, select the permission level(s) you want to assign to users.

Select Permission Levels

- Full Control - Has full control.
- Design - Can view, add, update, delete, approve, and customize.
- Contribute - Can view, add, update, and delete list items and documents.
- Read - Can view pages and list items and download documents.
- View Only - Can view pages, list items, and documents. Document types with server-side file handlers can be viewed in the browser but not downloaded.
- Approve - Can edit and approve pages, list items, and documents.
- Manage Hierarchy - Can create sites and edit pages, list items, and documents.
- Restricted Read - Can view pages and documents, but cannot view historical versions or user permissions.
- Records Center Web Service Submitters - Submit content to this site using Web Services.

f. Click **OK** to add the settings to the permission part.

3.3.4 Assign permissions Based on Content Type

Permission Workflow provides administrator with the option to apply premade permission settings to different content types such as documents, items, folders or document sets. It is very useful when you need to configure permissions for specific content type, such as folder.

In the **Apply Permissions to** section select the content types.

▼ Apply Permissions to

Apply permission settings to:

- Documents or Items
- Folder

3.4 Manage a Permission Part

After a permission part is created, you can modify, delete, activate and deactivate it.

3.4.1 Modify a Permission Part

a. On the Permission Workflow page, find the permission part which you want to modify and click the **Edit** command.

 Add Permission Part Load List Permission Settings Export Import		
Permission Settings Name	Status	Actions
Assign Approve permission	✔ Activated	View Edit Delete

- b. On the **Modify Permission Part** page, change the settings that you want and then click **OK**.
- c. On the Permission Workflow page, click **OK** to update the permission.

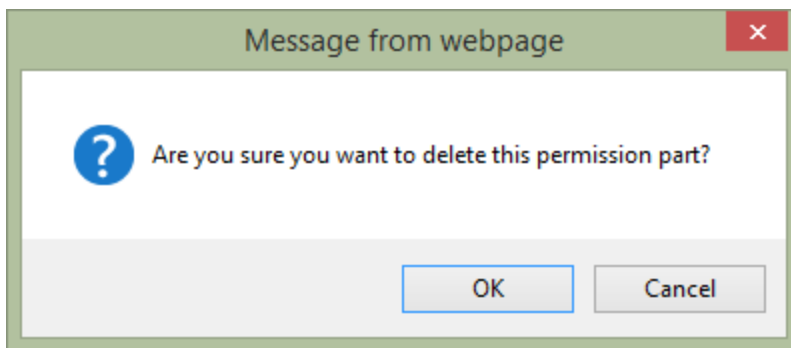
3.4.2 Remove a Permission Part

After a permission part is deleted, existing permissions will not be affected.

- a. On the Permission Workflow page, find the permission part which you want to remove and click **Delete**.

Permission Settings Name	Status	Actions
Assign Approve permission	Activated	View Edit Delete

- b. A message box will appear asking you to confirm the deletion.



- c. Click **OK** to confirm the deletion.

3.4.3 Activate/Deactivate a Permission Part

After a permission part is created, you can specify the permission part status to determine if a permission part is available.

To activate a permission part, find the deactivated permission part and click **Deactivated**.

Permission Settings Name	Status	Actions
Assign Approve permission	Deactivated	View Edit Delete

When a permission part is deactivated, the permission settings contained within will not update to items or documents when workflow runs next time. This is very useful when you only want to deactivate unused permission parts temporarily without deleting them.

To deactivate a permission part, find the activated permission part and click **Activated**.

Permission Settings Name	Status	Actions
Assign Approve permission	Activated	View Edit Delete

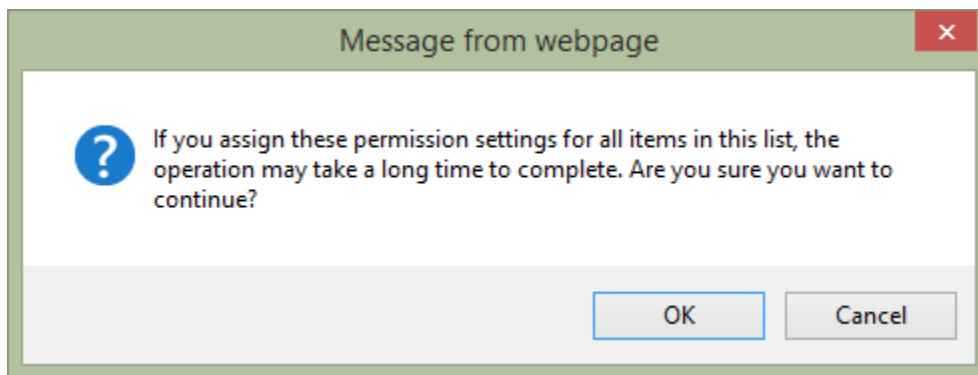
3.5 Apply Permissions for All Existing Items

Once you create multiple permission parts, you may want to apply the permissions to all existing content in the list or library. Permission Workflow offers a feature to help you to automatically run the workflow on existing items or documents without assigning them individually.

To enable this feature, you need to tick the **Assign all permission settings to all existing items in the list** option on Permission Workflow page.

Apply Permission to Enable all permission settings effect to existed items in the list

A message box will appear asking you to confirm the operation. Click **OK** to confirm the operation.

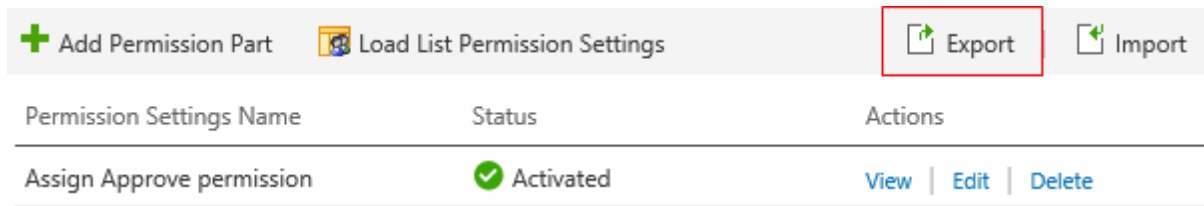


3.6 Export/Import Permission Workflow Settings

You can export Permission Workflow settings and apply them to other lists or libraries.

Exporting Permission Workflow Settings

- a. On the Permission Workflow page, click **Export**.

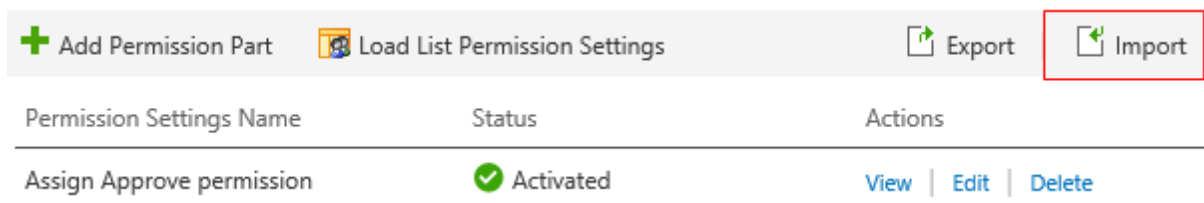


- b. Save the exported file in the desired folder on your computer.

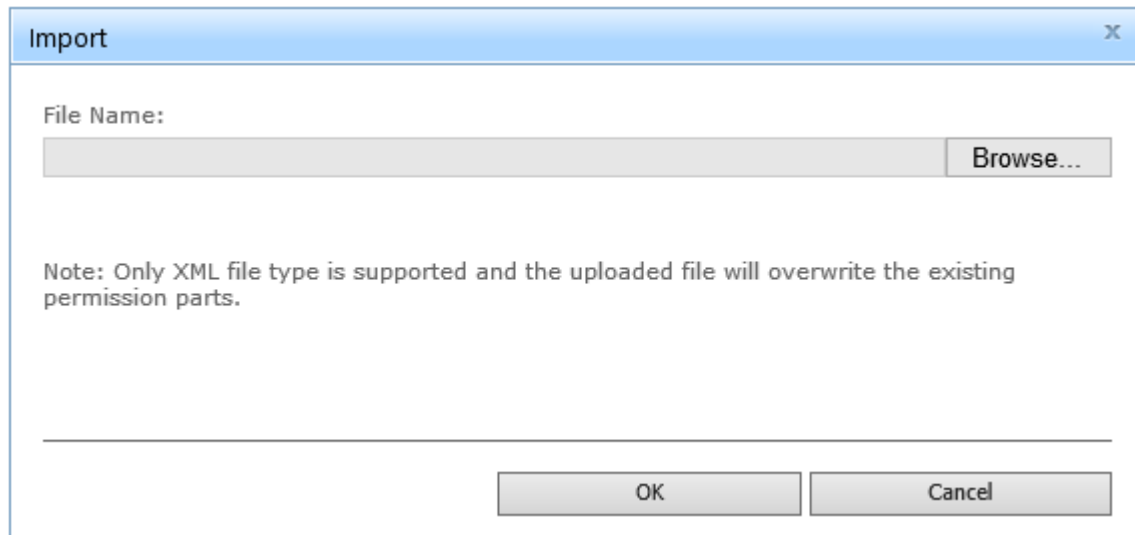
Importing Permission Workflow Settings

To import Permission Workflow settings from a file:

- a. On the Permission Workflow page, click **Import**.



- b. In the **Import** window, select the desired file which you want to import.



- c. Click **OK**.






Note

Importing permission settings which have been exported from another site collection may not succeed because of the different permission levels, external lists and user/group columns

3.7 Copy List Permissions as Permission Parts

This feature is used to copy list/library permission settings as individual permission parts and can be applied to items or documents.

To use this feature, you need to click the **Load List Permission Settings** link.

 Add Permission Part	 Load List Permission Settings	 Export  Import
Permission Settings Name	Status	Actions
Assign Approve permission	 Activated	View Edit Delete

4. Troubleshooting & Support

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 Workflow without entering any license code for a period of 30 days from when you first use it.

To use product after expiration, you will need to purchase a license and register the product.

Finding License Information

- a. In the products main page, click the **License Management** link, 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).

Download License Information ×

Download the license type information and send to sales@boostsolutions.com to get license.

Choose a license type

- Server License
 Server Code: 24edc5f10a7f4ca091bbc0fab63d3eaab468c3b17
 b5c44ee96d9b8e595000357
- Farm License
 Farm ID: {24edc5f1-0a7f-4ca0-91bb-c0fab63d3eaa}
 Number of Users: 22 user(s)
- Site Collection License
 Site Collection ID: 38d6d052-0dab-43dc-a669-cdd5ad7d7f3d [Change](#)
 Site Collection: <http://product2013/sites/Product Center>

Download

Close

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.

Register or Update license

Please upload a license code file or enter the license code to activate the product.

Upload a license code file

Enter license code

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

Registered Successfully



Registered Successfully

- ▶ The license was verified successfully.
- ▶ Thank you for choosing BoostSolutions.

If you encounter any problems or would like to suggest a product requirement, please contact support@boostsolutions.com

For more details on license management, see the [BoostSolutions Foundation](#).