Permission by Rule 4.0

User Guide

Copyright

Contents

1. Introduction

Organizations generate a number of documents every day and some may contain sensitive information. Permission by Rule 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 by Rule 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 by Rule settings
- Preview Permission by Rule part settings

This user guide will show you how to install, configure and use Permission by Rule on your SharePoint 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 by Rule 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 by Role_V4_User Guide.pdf	User guide for Permission by Role in PDF format.
Library\2.0\Setup.exe	The product installer for .Net Framework 3.5.
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 4.5.
Library\4.0\Setup.exe.config	A file containing the configuration information for the installer.
Library\6.0\Setup.exe	The product installer for .Net Framework 4.6
Library\6.0\Setup.exe.config	A file containing the configuration information for the installer.
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\ BoostSolutions.FoundationSetup16.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2016/2019.
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 by Rule files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\PermissionWorkflow\ BoostSolutions.PermissionWorkflowSetup15.4.wsp	A SharePoint solution package containing Permission by Rule files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\PermissionWorkflow\ BoostSolutions.PermissionWorkflowSetup16.4.wsp	A SharePoint solution package containing Permission by Rule files and resources for SharePoint 2016/2019.
Solutions\PermissionWorkflow\Install.config	A file containing the configuration information for the installer.

2.2 Software Requirements

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

SharePoint 2019

Operating System	Windows Server 2016 Standard or Datacenter Windows Server 2019 Standard or Datacenter
Server	Microsoft SharePoint Server 2019
Browser	Microsoft Internet Explorer 11 and above Microsoft Edge Mozilla Firefox Google Chrome

SharePoint 2016

Operating System	Microsoft Windows Server 2012 Standard or Datacenter X64 Microsoft Windows Server 2016 Standard or Datacenter
Server	Microsoft SharePoint Server 2016 Microsoft .NET Framework 4.6

Browser	Microsoft Internet Explorer 10 and above Microsoft Edge Mozilla Firefox Google Chrome

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 Microsoft Edge Mozilla Firefox Google Chrome

SharePoint 2010

Operating System	Microsoft Windows Server 2008 x64 Microsoft W0indows 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 by Rule 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**.
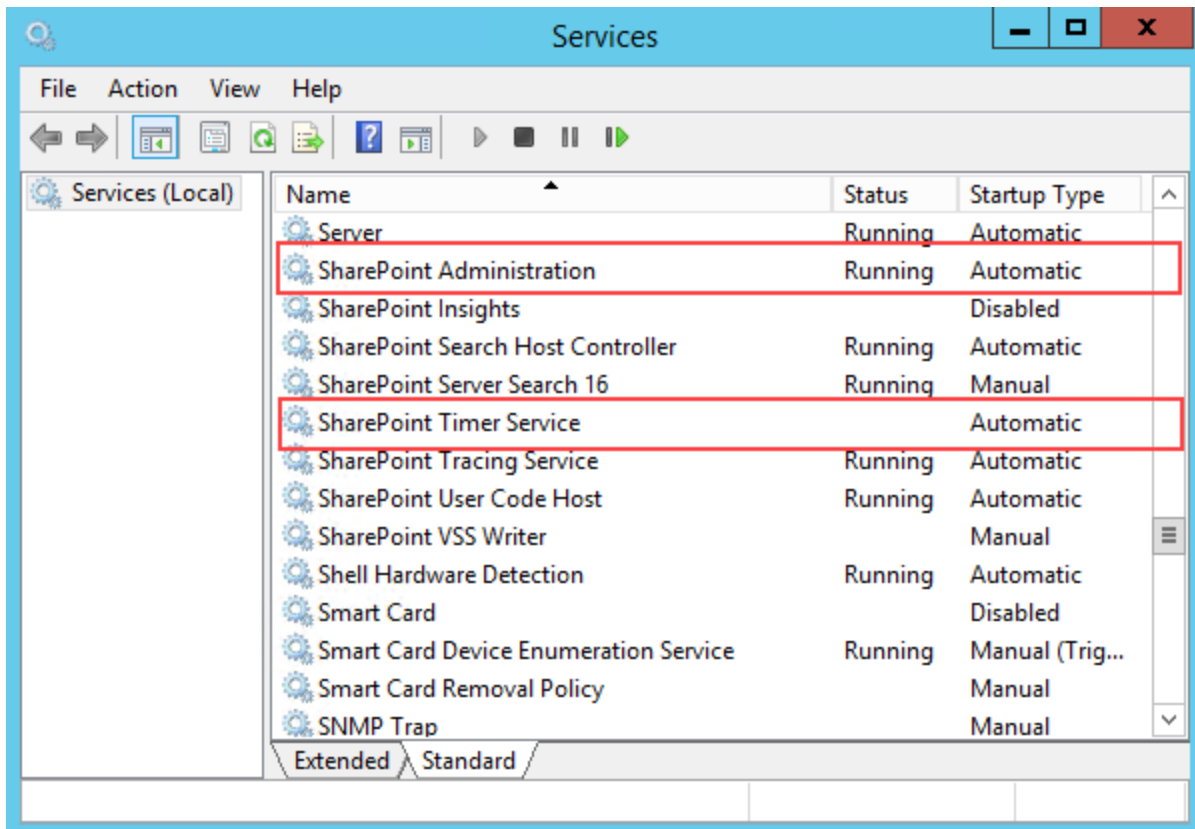
Permission by Rule must be run on one front-end Web server in the SharePoint farm where **Microsoft SharePoint Foundation Web Application services** are running. Check **Central Administration** -> **System Settings** for a list of servers running this service.

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 by Rule on SharePoint server.

a. Download the zip file (*.zip) for Permission by Rule 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 by Rule has been installed to. Click **Close**.

2.4 Upgrade

Download the latest version of Permission by Rule 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 by Rule, 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 by Rule 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 by Rule 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 2010**

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\14\BIN

- **SharePoint 2013**

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

- **SharePoint 2016**

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\16\BIN

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

> *stsadm -o addsolution -filename BoostSolutions.PermissionWorkflowSetup16.4.wsp*
>
> *stsadm -o addsolution -filename BoostSolutions.FoundationSetup16.1.wsp*

d. Deploy the added solution with the following command:

> *stsadm -o deploysolution -name BoostSolutions.PermissionWorkflowSetup16.4.wsp –allowgacdeployment –immediate*
>
> *stsadm -o deploysolution -name BoostSolutions.FoundationSetup16.1.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.PermissionWorkflowSetup16.4.wsp*
>
> *stsadm -o displaysolution -name BoostSolutions.FoundationSetup16.1.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*

To remove Permission by Rule from SharePoint servers.

a. Removal is initiated with the following command:

> *stsadm -o retractsolution -name BoostSolutions.PermissionWorkflowSetup16.4.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.PermissionWorkflowSetup16.4.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.PermissionWorkflowSetup16.4.wsp*

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.FoundationSetup16.1.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.FoundationSetup16.1.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.FoundationSetup16.1.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.   Click **Settings** and then click **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**.

BoostSolutions Permission by Rule 4.10.0.317

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

Deactivate   Active

Activate Permission by Rule'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 by Rule's feature and click **Activate**. After a feature is activated, the Status column lists the feature as **Active**.

Permission by Rule Timer Job

Add or delete a timer job for permission by Rule. (Powered by BoostSolutions)

Deactivate   Active

3. Manage Permission by Rule

3.1 Enter Permission by Rule Settings Page

a. Navigate to the list or library where you want to configure Permission by Rule 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 by Rule** from the workflow template list.

Select a workflow template:

BoostSolutions Permission by Rule
Disposition Approval
Three-state

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

If you can't find BoostSolutions Permission by Rule 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 **Start this workflow when a new item is created** and **Start this workflow when an item is changed** checkboxes if you wish to start this workflow automatically.

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

3.2 Enable/Disable Permission by Rule

Permission by Rule 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 by Rule   Enable ▾

If you disable the Permission by Rule, then it will not run on the list.

Permission by Rule   Disable ▾

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 by Rule page, click **Add Permission Part**.
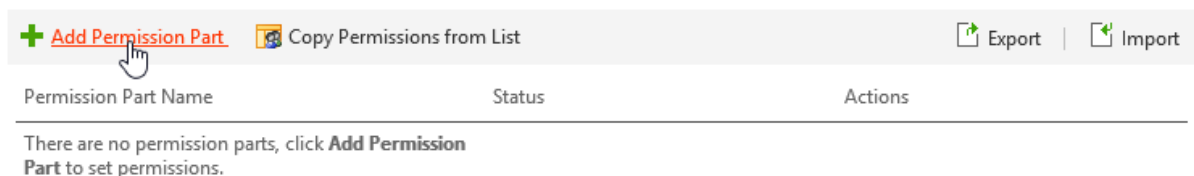
b.   On the Add Permission Part page, enter a unique name in the **Permission Part Name** section.

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 by Rule 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 of 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 by Rule 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:

a.   In the **Include Users** section, click on **Select more users**.

b.   In the **Choose User/Group Columns** section, select one or more user or group columns in the current list.

c.   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.

d.   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**.
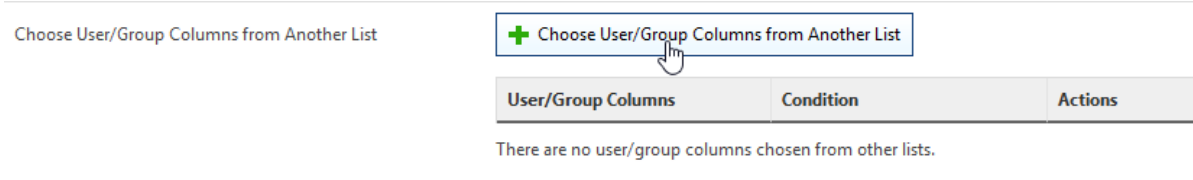
c. Select the site and list and then select the user or group columns.
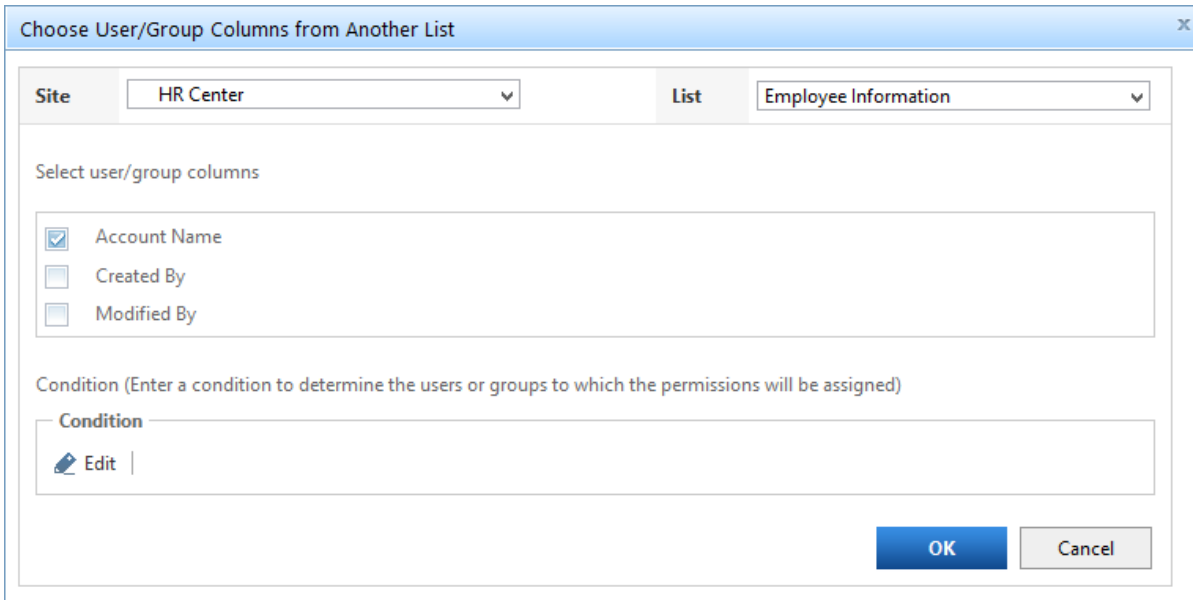
d. Click the Edit command to open the Condition editor. Specify conditions to filter users or groups.
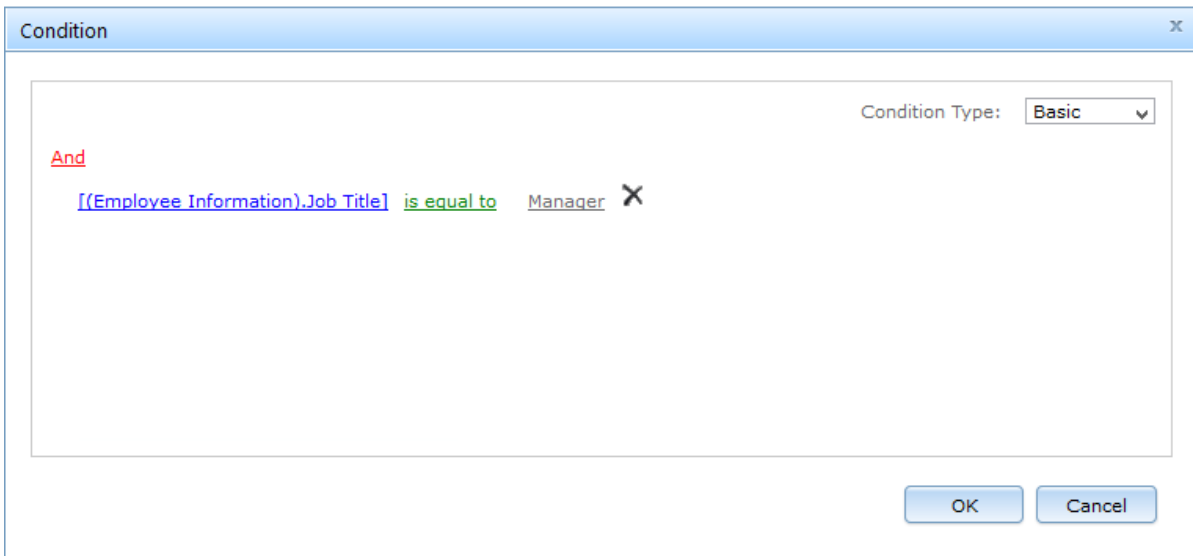
e. Click **OK** to save the conditions and **OK** again to save the **Choose User/Group Columns from Another List** settings.

Choose User/Group Columns from Another List

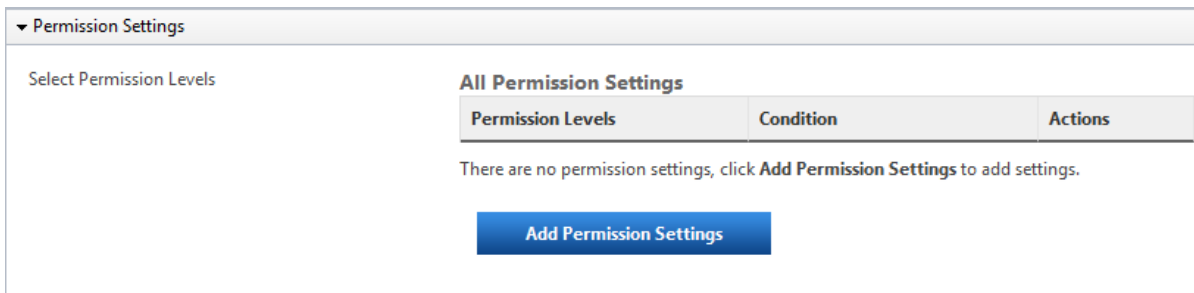**+ Choose User/Group Columns from Another List**

User/Group Columns	Condition	Actions
Site: HR Center **List:** Employee Information **User Columns:** Account Name	[(Employee Information).Job Title] == "Manager"	Edit Delete

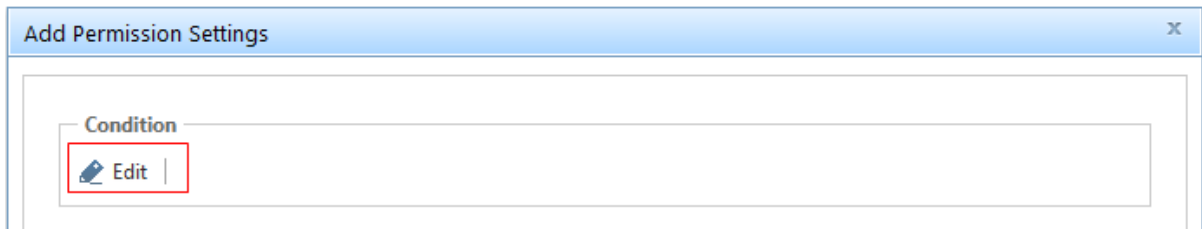### 3.3.3 Assign Permissions According to Metadata

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**.

▾ Permission Settings

Select Permission Levels

All Permission Settings

Permission Levels	Condition	Actions

There are no permission settings, click **Add Permission Settings** to add settings.

Add Permission Settings

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

Add Permission Settings   x

Condition

✎ Edit |

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

Two conditions 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.

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

3.3.4 Assign permissions Based on Content Type

Permission by Rule 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.

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 by Rule page, find the permission part which you want to modify and click the **Edit** command.

b. On the **Modify Permission Part** page, change the settings that you want and then click **OK**.

c. On the Permission by Rule page, click **OK** to update the permission.
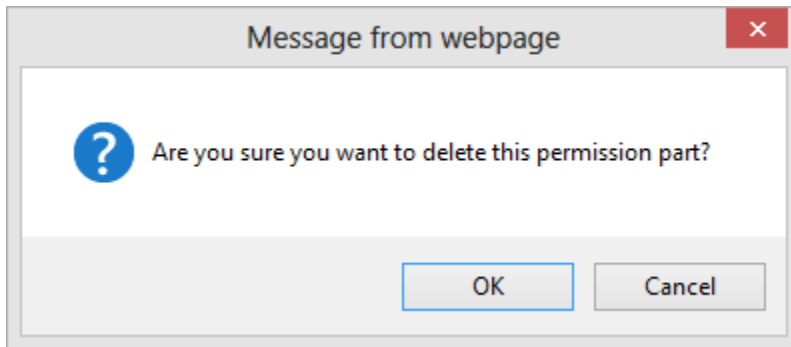
3.4.2 Remove a Permission Part

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

a. On the Permission by Rule page, find the permission part which you want to remove and click **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**.

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**.

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 by Rule 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 by Rule page.

Apply Permission to   ☑ Assign all permission settings to all existing items in the list

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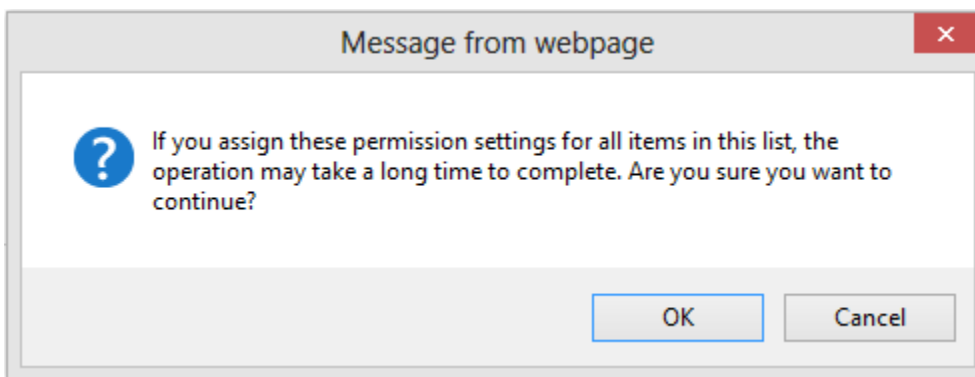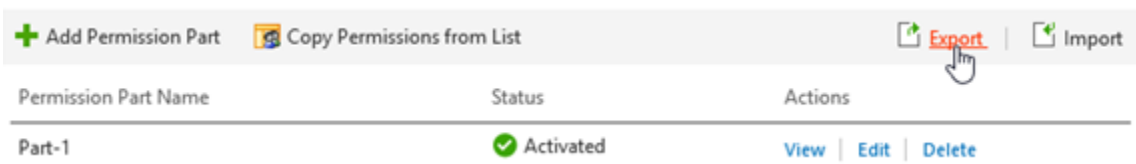

3.6 Export/Import Permission by Rule Settings

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

Exporting Permission by Rule Settings

a.   On the Permission by Rule page, click **Export**.

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

Importing Permission by Rule Settings

To import Permission by Rule settings from a file:

a.   On the Permission by Rule 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 **Copy Permission from List** link.

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 by Rule 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).

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

[   ] [Browse...]

○ Enter license code

[   ]

[Register]   [Close]

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

[Close]

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