SharePoint Permission Workflow

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

Further information is also available in our FAQ.

Feature Introduction

User/Group Selection Process

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

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

a) Input user and group names

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

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

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

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

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

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

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

Specify Selection Criteria Based on Conditions

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

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

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

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

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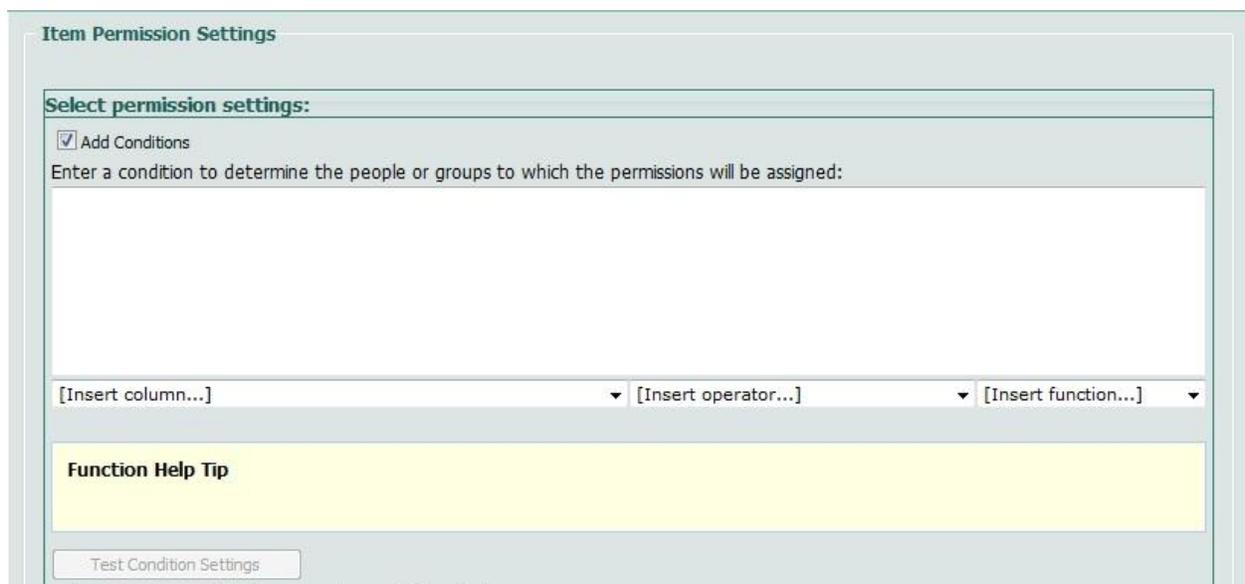
By entering conditions, the administrator can specify for which items the permissions are set. The main difference to the user selection process is that these conditions are only based on the current list. There is no reference to other lists possible. Also, the selection process is not based on any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

Conditions Guide

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

Import/Export Permission Parts

Import or Export

Import or export current settings as an xml file.

| Import | Export |

The new version of Permission Workflow allows for importing and exporting permission parts. This function is based on XML files. Thus, creating similar permissions for different sites will be easier and less time consuming.
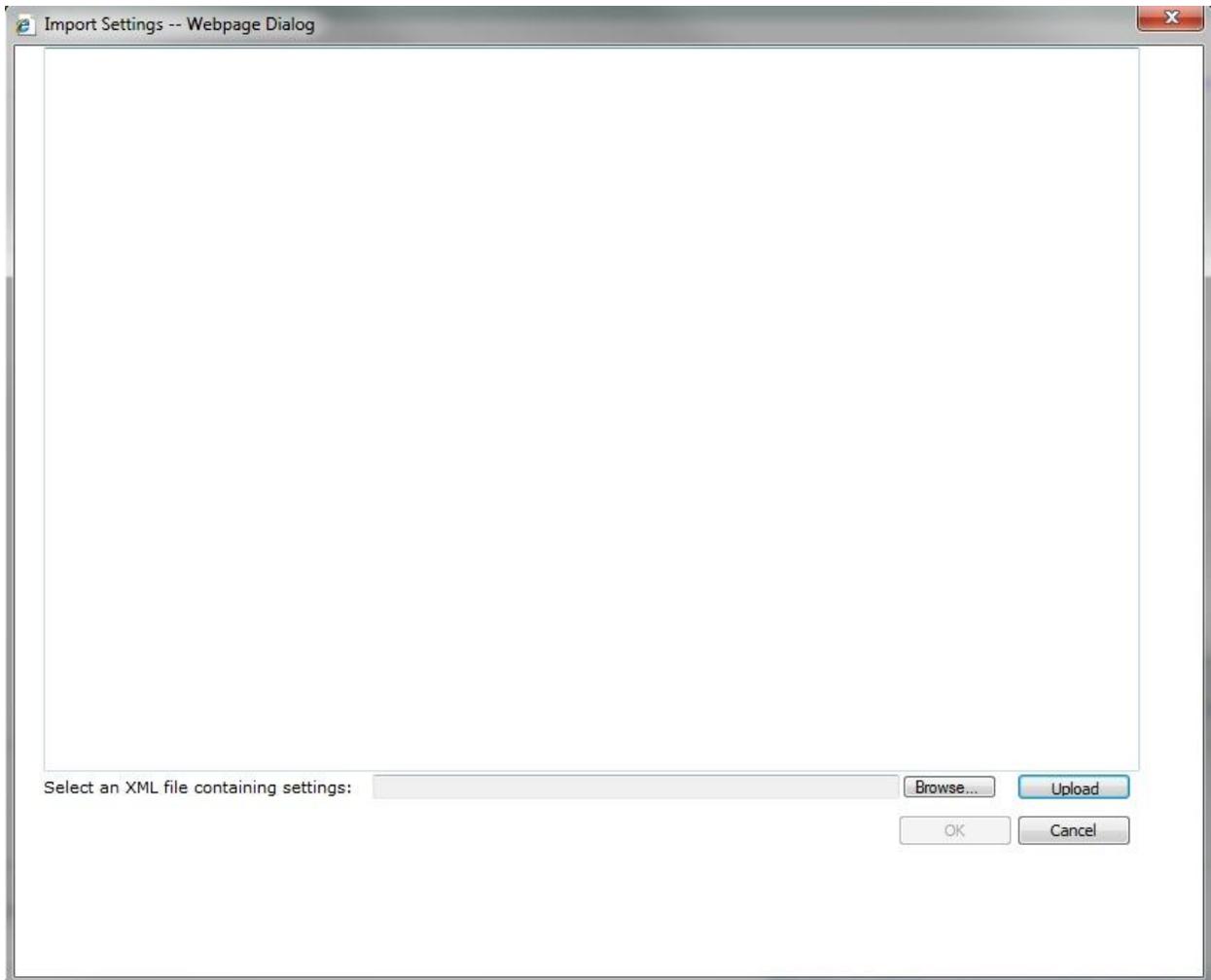
To import settings click the Import button. A popup window will open. There the administrator can either paste the XML file contents into the designated area, or browse for a file and upload it. After uploading the file the contents will be displayed in the area above the upload area. To confirm importing the XML file click the OK button. To abort importing the specified permission settings, click the Cancel button.

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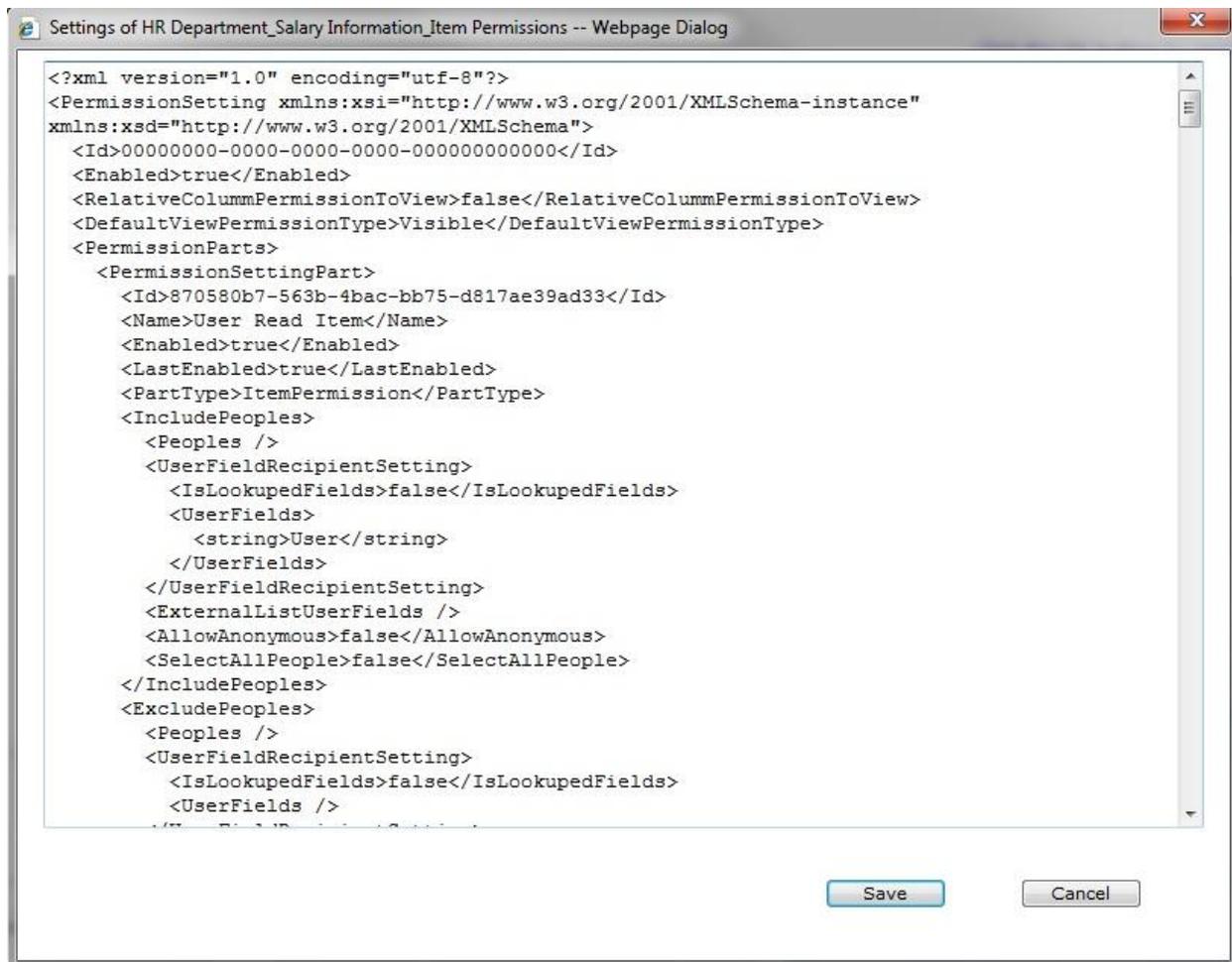
To export permission settings click the Export button. A popup window will open and display the XML file contents in the edit area. The administrator can then save the settings to any location and thus make it reusable in other lists. To abort exporting the settings, click the Cancel button.

Enable or Disable Permission Workflow

Permission Workflow

Enable or disable Permission Workflow

Enable or Disable Permission Workflow
● Enable
○ Disable

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

Permission Settings

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

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

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

Assign permissions for all items

Assign permissions for all items

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

☐ Assign item-level permissions for all items

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

Message from webpage

❓ If you assign these permission settings for all items in this list, the operation may take a long time to complete. Are you sure you want to continue?

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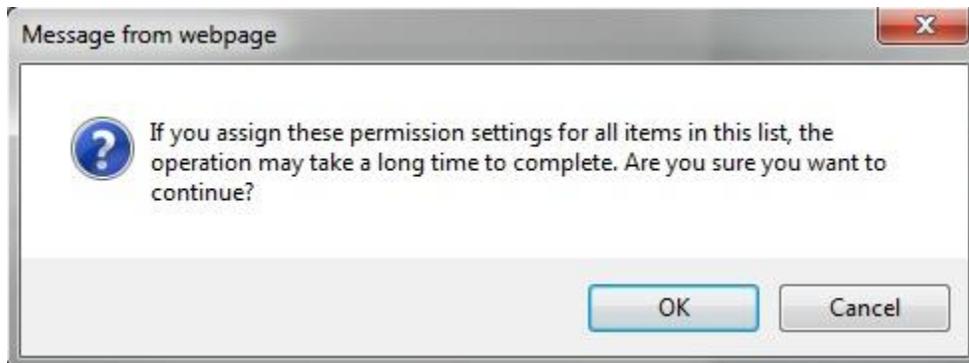
To finally implement these changes the administrator has to confirm by clicking the OK button in the main settings page.

Item Permission Settings

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

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

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

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

Example

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

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

Change a Workflow: Salary Information

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

Workflow

Select a workflow to add to this list. If the workflow template you want does not appear, contact your administrator to get it added to your site collection or workspace.

Select a workflow template:

Disposition Approval
SharePointBoost Alert Workflow
SharePointBoost Reminder Work
SPB Permission Workflow

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

Name

Type a name for this workflow. The name will be used to identify this workflow to users of this list.

Type a unique name for this workflow:

Permissions

Task List

Select a task list to use with this workflow. You can select an existing task list or request that a new task list be created.

Select a task list:

Tasks

Description:
Use the Tasks list to keep track of work that you or your team needs to complete.

History List

Select a history list to use with this workflow. You can select an existing history list or request that a new history list be created.

Select a history list:

Workflow History

Description:
History list for workflow.

Start Options

Specify how this workflow can be started.

☑ Allow this workflow to be manually started by an authenticated user with Edit Items Permissions.

☐ Require Manage Lists Permissions to start the workflow.

☐ Start this workflow to approve publishing a major version of an item.

☑ Start this workflow when a new item is created.

☑ Start this workflow when an item is changed.

[Next] [Cancel]

Then the Permission Workflow main page will open.

Customize Salary Information

Permissions Main Settings Page

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

Permission Boost

Enable or disable Permission Workflow

Enable or Disable Permission Workflow
◉ Enable
○ Disable

Permission Settings

Set item-level permission parts.

Permission Settings Name (Click to edit)	Click to Delete	Enable/Disable	State
User Read Item	[Delete]	[Disable]	Enabled

▫ Add Item Permission Settings
▫ Click here to restore the original permission settings for users (for this list only)

Import or Export

Import or export current settings as an xml file.

[Import] [Export]

Assign permissions for all items

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

☐ Assign item-level permissions for all items

License Management

Manage license for Permission Workflow

Click here to manage license for Permission Workflow 2.0.312.1

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

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

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

Modify item permission settings

[OK] [Delete] [Cancel]

Permission Settings Name
Enter a unique name for these permission settings

Enter a name for these Permission Settings:

User Read Item

Include People
Select people to whom you want to assign permissions

Enter users/groups

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

Permission Settings
Permission Settings

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

[OK] [Delete] [Cancel]

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

Salary Information

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

📎 ◯ User	Employee ID	Social Security Number	Salary
Anthony Rodriguez	RA010808PD15	632-01-1179	$40,000.00