

## SharePoint Item Permission Batch

Please note that Item Permission Batch has to be activated before it can be used. For further reference, please see our [Product Installation Guide](#).

Further information is also available in our [FAQ](#).

## Feature Introduction

### *Restore Default Permissions*

#### Restore Default Permissions

Restore the original permission settings configured for this list. (All custom permission settings will be lost.)

This action will **disable** the SPB Permission Workflow in the current list.

Restore Default Permissions

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

Global Home > HR Department > Salary Information > Settings

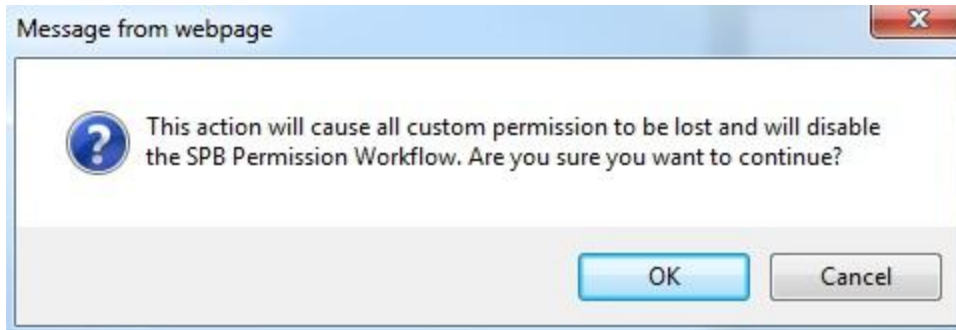
### Customize Salary Information

**List Information**

Name: Salary Information  
Web Address: http://vmdevbase/HR Department/Lists/Salary Information/Salary Info Confidential.aspx  
Description:

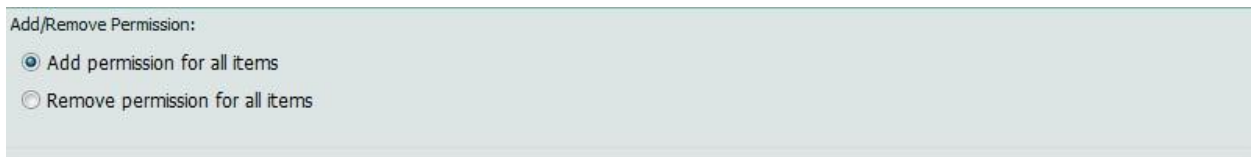
General Settings	Permissions and Management	Communications
<ul style="list-style-type: none"><li>Title, description and navigation</li><li>Versioning settings</li><li>Advanced settings</li><li>Audience targeting settings</li><li>KWizCom SharePoint Notification Feature</li><li>List Item Ranking Settings (Powered by SharePointBoost)</li><li>RichText Boost Settings (Powered by SharePointBoost)</li></ul>	<ul style="list-style-type: none"><li>Delete this list</li><li>Save list as template</li><li><b>Permissions for this list</b></li><li>Workflow settings</li><li>Information management policy settings</li><li>Column Permission settings (Powered by SharePointBoost)</li><li>View Permission settings (Powered by SharePointBoost)</li><li>Item Permission Batch settings (Powered by SharePointBoost)</li><li>Form validation settings (Powered by SharePointBoost)</li></ul>	<ul style="list-style-type: none"><li>RSS settings</li></ul>

This will also disable the SharePointBoost Permission Workflow.



Once clicking this button a popup window will prompt the administrator to confirm and continue.

### *Add/Remove Permission*



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

### *User/Group Selection Process*

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

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

A screenshot of a web interface showing a text input field with the title "Enter users/groups". The field is empty and has a light blue border. In the bottom right corner of the field, there are two small icons: a red and blue checkmark and a blue document icon.

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

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

A screenshot of a web interface showing a selection panel titled "Choose columns containing users or user groups". The panel contains a list of checkboxes with the following labels: "Display any related columns (i.e. lookup columns)", "User", "Created By", and "Modified By". All checkboxes are currently unchecked.

As in previous versions, Item Permission Batch provides checkboxes with all User/group columns available. Checking these checkboxes will result in selecting the users which are contained within the selected column. The administrator can also select related columns, if the checkbox to display them is checked. This means that all user/group columns in the list that is looked up from will be available for selection.

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

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

Choose user or group columns from another SharePoint list

**Choose user/group columns from a different list:** X

Select a site:  Select a list:

Select a column containing people or groups:

Created By

Modified By

Add condition

Enter a condition to determine the people or groups to which the permissions will be assigned:

[Insert column...] [Insert operator...] [Insert function...]

**Function Help Tip**

[Add users from another list](#)

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

### *Specify Selection Criteria Based on Conditions*

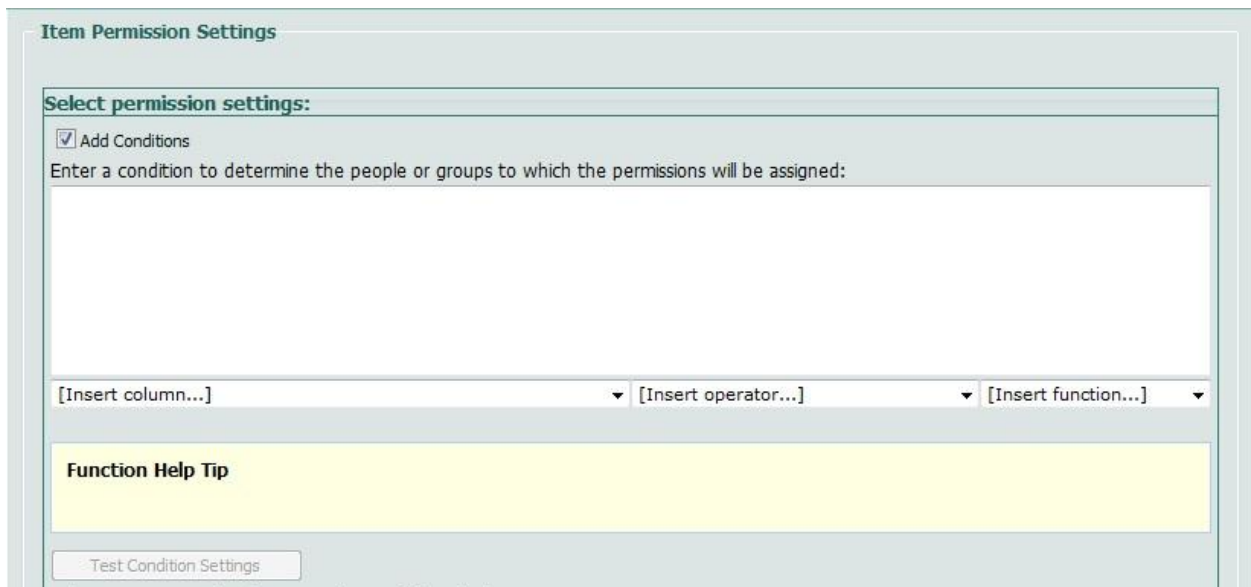
We have introduced conditions to specify user and items even more precise, and thus providing an even more granular approach. The conditions sections have been added in two sections:

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

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

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

b) Specifying items that will be affected by the permission settings:

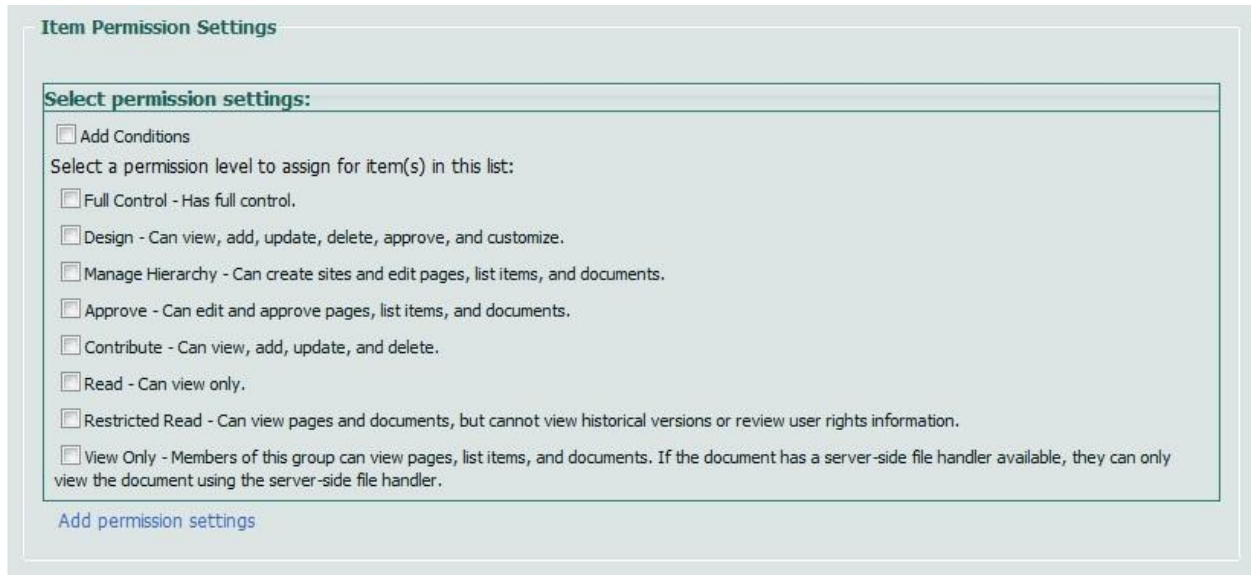


By entering conditions, the administrator can specify for which items the permissions are set. The main difference to the user selection process is that these conditions are only based on the current list. There is no reference to other lists possible. Also, the selection process is not based on any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

### *Conditions Guide*

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

## Item Permission Settings



The screenshot shows a dialog box titled "Item Permission Settings". Inside, there is a section titled "Select permission settings:" with a checkbox for "Add Conditions". Below this, a prompt asks to "Select a permission level to assign for item(s) in this list:". A list of permission levels follows, each with a checkbox and a description: "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.", and "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." At the bottom left of the dialog, there is a blue link that says "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

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

Global Home > HR Department > Salary Information > Settings > Permissions

### Permissions: Salary Information

Use this page to assign users and groups permission to this list. This list does not inherit permissions from its parent Web site.

New | Actions

<input type="checkbox"/>	Users/Groups	Type	User Name	Permissions
<input type="checkbox"/>	Angela Phillips	User	KKK\angela	Limited Access
<input type="checkbox"/>	Anthony Rodriguez	User	KKK\anthony	Limited Access
<input type="checkbox"/>	Approvers	SharePoint Group	Approvers	Approve
<input type="checkbox"/>	Ashley Davis	User	KKK\ashley	Limited Access
<input type="checkbox"/>	Catherine Brown	User	KKK\catherine	Limited Access
<input type="checkbox"/>	Christian	User	KKK\christian	Limited Access
<input type="checkbox"/>	Claire Turner	User	KKK\claire	Limited Access
<input type="checkbox"/>	Daniel Lopez	User	KKK\daniel	Limited Access
<input type="checkbox"/>	Designers	SharePoint Group	Designers	Design
<input type="checkbox"/>	Hierarchy Managers	SharePoint Group	Hierarchy Managers	Manage Hierarchy
<input type="checkbox"/>	Isabella Garcia	User	KKK\isabella	Limited Access
<input type="checkbox"/>	James White	User	KKK\james	Limited Access
<input type="checkbox"/>	Jennifer Smith	User	KKK\jennifer	Limited Access
<input type="checkbox"/>	John Smith	User	KKK\john	Limited Access
<input type="checkbox"/>	Kevin Lee	User	KKK\kevin	Limited Access
<input type="checkbox"/>	Madison Taylor	User	KKK\madison	Limited Access
<input type="checkbox"/>	Mary Jackson	User	KKK\maryj	Limited Access
<input type="checkbox"/>	Mary Johnson	User	KKK\mary	Limited Access
<input type="checkbox"/>	Michael Peters	User	KKK\michael	Limited Access
<input type="checkbox"/>	Peter Anderson	User	KKK\peter	Limited Access
<input type="checkbox"/>	Quick Deploy Users	SharePoint Group	Quick Deploy Users	Limited Access
<input type="checkbox"/>	Rachel Jackson	User	KKK\rachel	Limited Access
<input type="checkbox"/>	Restricted Readers	SharePoint Group	Restricted Readers	Restricted Read
<input type="checkbox"/>	Style Resource Readers	SharePoint Group	Style Resource Readers	Limited Access
<input type="checkbox"/>	Susan Lewis	User	KKK\susan	Limited Access
<input type="checkbox"/>	Team Site Members	SharePoint Group	Team Site Members	Contribute
<input type="checkbox"/>	Team Site Owners	SharePoint Group	Team Site Owners	Full Control
<input type="checkbox"/>	Team Site Visitors	SharePoint Group	Team Site Visitors	Read
<input type="checkbox"/>	Viewers	SharePoint Group	Viewers	View Only

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

Global Home > HR Department > Salary Information > BC150707MK05 > Permissions

### Permissions: BC150707MK05

Use this page to assign users and groups permission to this list item. This list item does not inherit permissions from its parent folder or list.

New | Actions

<input type="checkbox"/>	Users/Groups	Type	User Name	Permissions
<input type="checkbox"/>	Catherine Brown	User	KKK\catherine	Read



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

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

Global Home > HR Department > Salary Information > Settings

### Customize Salary Information

**List Information**

Name: Salary Information  
 Web Address: http://vmdevbase/HR Department/Lists/Salary Information/Salary Info Confidential.aspx  
 Description:

---

**General Settings**

- Title, description and navigation
- Versioning settings
- Advanced settings
- Audience targeting settings
- KWizCom SharePoint Notification Feature
- List Item Ranking Settings (Powered by SharePointBoost)
- RichText Boost Settings (Powered by SharePointBoost)

**Permissions and Management**

- Delete this list
- Save list as template
- Permissions for this list
- Workflow settings
- Information management policy settings
- Column Permission settings (Powered by SharePointBoost)
- View Permission settings (Powered by SharePointBoost)
- Item Permission Batch settings (Powered by SharePointBoost)**
- Form validation settings (Powered by SharePointBoost)

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

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

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

Global Home > HR Department > HR Management

### HR Management

New Actions Settings View: **Restricted Info**

Employee ID	Family Name	First Name	Email	Phone	Department	Position	Reporting To	User
PM010608GM01	Peters	Michael	Peters.Michael@testcorp.com	(8133) 279-0717	General Manager	Owner		Michael Peters
JR010608AD03	Jackson	Rachel	Jackson.Rachel@testcorp.com	(8199) 560-6794	Administration	Manager	General Manager	Rachel Jackson
SJ010708AD04	Smith	John	Smith.John@testcorp.com	(8122) 197-6471	Administration	Assistant	Manager Administration	John Smith
BC150707MK05	Brown	Catherine	Brown.Catherine@testcorp.com	(8122) 517-3257	Marketing	Manager	General Manager	Catherine Brown
AP010708MK06	Anderson	Peter	Anderson.Peter@testcorp.com	(8133) 124-9850	Marketing	Assistant	Manager Marketing	Peter Anderson
TM010808MK07	Taylor	Madison	Taylor.Madison@testcorp.com	(8144) 211-9067	Administration	Assistant	Manager Marketing	Madison Taylor
GI010808MK08	Garcia	Isabella	Garcia.Isabella@testcorp.com	(8155) 559-9317	Marketing	Assistant	Manager Marketing	Isabella Garcia
JM010109MK09	Jackson	Mary	Jackson.Mary@testcorp.com	(8111) 242-4900	Marketing	Sales Associate	Manager Marketing	Mary Jackson
SJ010109MK10	Smith	Jennifer	Smith.Jennifer@testcorp.com	(8155) 250-1016	Marketing	Sales Assistant	Manager Marketing	Jennifer Smith
WJ010608PD11	White	James	White.James@testcorp.com	(8155) 271-3396	Production&Development	Manager	General Manager	James White
LP010708PD12	Lopez	Daniel	Lopez.Daniel@testcorp.com	(8111) 559-8667	Production&Development	Project Manager	Manager Production&Development	Daniel Lopez
PA010708PD13	Phillips	Angela	Phillips.Angela@testcorp.com	(8111) 102-1032	Production&Development	Developer	Project Manager Production&Development	Angela Phillips
TC010808PD14	Turner	Claire	Turner.Claire@testcorp.com	(8155) 834-8501	Production&Development	Developer	Project Manager Production&Development	Claire Turner
RA010808PD15	Rodriguez	Anthony	Rodriguez.Anthony@testcorp.com	(8122) 831-1370	Production&Development	Developer	Project Manager Production&Development	Anthony Rodriguez
LK010109PD16	Lee	Kevin	Lee.Kevin@testcorp.com	(8122) 206-9647	Production&Development	Developer	Project Manager Production&Development	Kevin Lee
LS010609PD17	Lewis	Susan	Lewis.Susan@testcorp.com	(8122) 408-5308	Production&Development	Developer	Project Manager Production&Development	Susan Lewis
JM010708PD18	Johnson	Mary	Johnson.Mary@testcorp.com	(8155) 420-9327	Production&Development	Product Support Assistant	Manager Production&Development	Mary Johnson
DA010109PD19	Davis	Ashley	Davis.Ashley@testcorp.com	(8155) 593-8646	Production&Development	Product Support Assistant	Manager Production&Development	Ashley Davis

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



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

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

The screenshot shows a SharePoint configuration interface for permissions. The main window is titled "Choose columns containing users or user groups" and contains several sections:

- Choose columns containing users or user groups:** A section with a checkbox "Display any related columns (i.e. lookup columns)" and three checkboxes: "User", "Created By", and "Modified By".
- Choose user or group columns from another SharePoint list:** A section with a sub-dialog box titled "Choose user/group columns from a different list:". This sub-dialog box contains:
  - Two dropdown menus: "Select a site:" (set to "HR Department") and "Select a list:" (set to "HR Management").
  - A section "Select a column containing people or groups:" with checkboxes for "User" (checked), "Created By", and "Modified By".
  - A checkbox "Add condition" (checked).
  - A text input field containing the condition: `[(HR Management).Department]=="Administration"&&[(HR Management).Position]=="Manager"`.
  - Three dropdown menus: "[Insert column...]", "[Insert operator...]", and "[Insert function...]".
  - A yellow highlighted box with the text: **is equal to (==)** and a description: "For predefined value types, the equality operator (==) returns true if the values of its operands are equal, false otherwise. For reference types other than string, == returns true if its two operands refer to the same object. For the string type, == compares the values of the strings."
  - Buttons: "Test Condition Settings" and "Test Successful!".
- At the bottom of the main window, there is a link: "Add users from another list".

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

**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](#)

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

Add/Remove Permission:

- Add permission for all items
- Remove permission for all items

Enter users/groups

Michael Peters



Choose columns containing users or user groups

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

- User
- Created By
- Modified By

Choose user or group columns from another SharePoint list

[Add users from another list](#)

Item Permission Settings

Select permission settings:

Add Conditions

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

- Full Control - Has full control.
- Design - Can view, add, update, delete, approve, and customize.
- Manage Hierarchy - Can create sites and edit pages, list items, and documents.
- Approve - Can edit and approve pages, list items, and documents.
- Contribute - Can view, add, update, and delete.
- Read - Can view only.
- Restricted Read - Can view pages and documents, but cannot view historical versions or review user rights information.
- View Only - Members of this group can view pages, list items, and documents. If the document has a server-side file handler available, they can only view the document using the server-side file handler.

[Add permission settings](#)

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

## Permissions: RA010808PD15

Use this page to assign users and groups permission to this list item. This list item does not inherit permissions from its parent folder or list.

New  Actions

<input type="checkbox"/>	Users/Groups	Type	User Name	Permissions
<input type="checkbox"/>	Anthony Rodriguez	User	KKK\anthony	Read
<input type="checkbox"/>	Michael Peters	User	KKK\michael	Approve
<input type="checkbox"/>	Rachel Jackson	User	KKK\rachel	Contribute