

ArtfulBits Column Permissions

for Microsoft® SharePoint®



User Guide

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Overview

ArtfulBits Column Permissions allows you to manage access to list content on column level. Permissions can be assigned for individual users and for SharePoint groups as well and are effective in forms and list views, as well as in the SharePoint Alerts, RSS, Datasheet and even during exporting to Excel and opening with Access.

Feature List

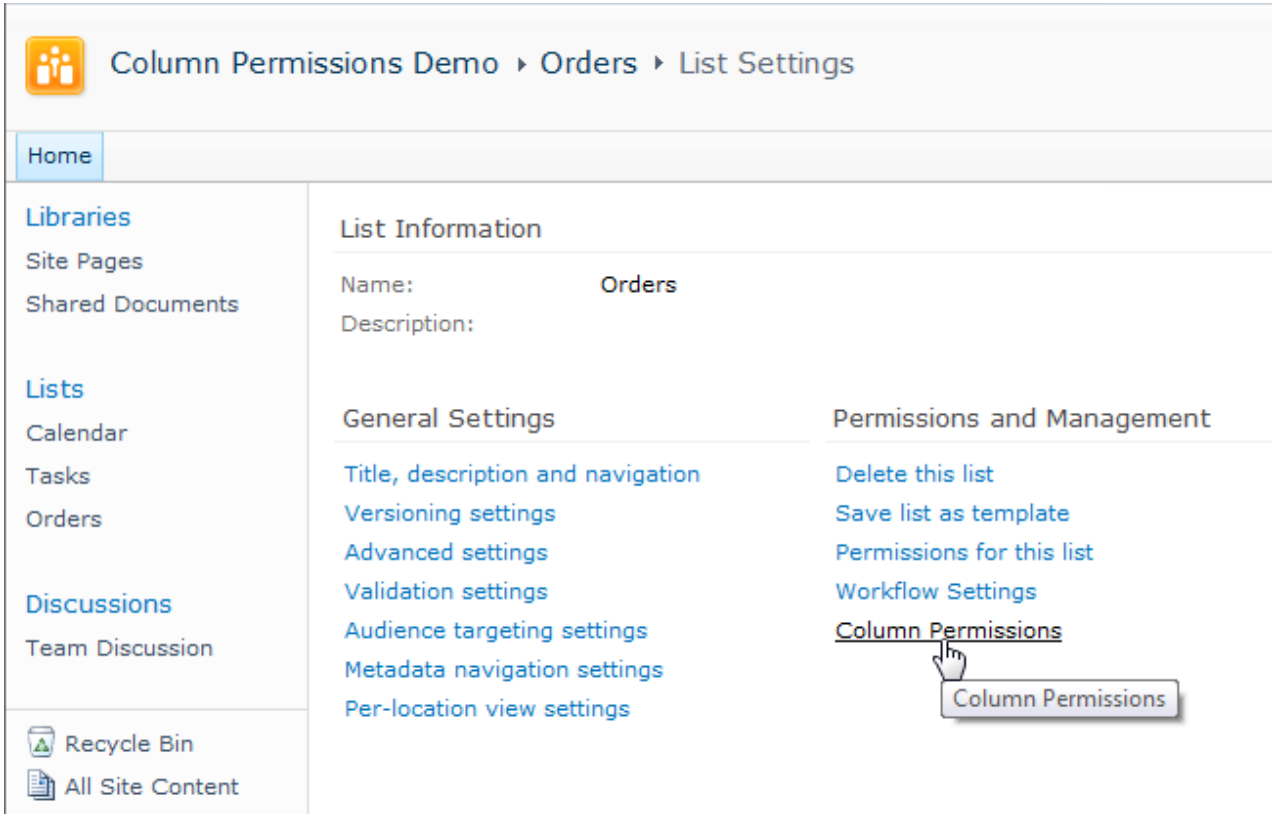
Feature	SharePoint 2007	SharePoint 2010
Supported read-only and hidden permissions for individual columns	✓	✓
Assigned to individual users and SharePoint groups	✓	✓
Effective for item New/Edit/Display forms	✓	✓
Works with Attachments	✓	✓
Applied to list views	✓	✓
Effective for Alerts, linking to Access, editing in Datasheet, exporting to Excel	✓	✓
Supported check effective permissions	✓	✓
Hide or disable columns on server side	✓	✓
Language pack support (localization could be added by request)	✓	✓

Why ArtfulBits Column Permissions?

If there are particular columns in SharePoint list that contain sensitive data that must be secured independently of containing list, you need ArtfulBits Column Permissions. It is powerful tool to manage column-level permissions that are effective in any column view, included New/Edit item forms, list views, MS Access, Excel, Datasheet, Alerts and RSS.

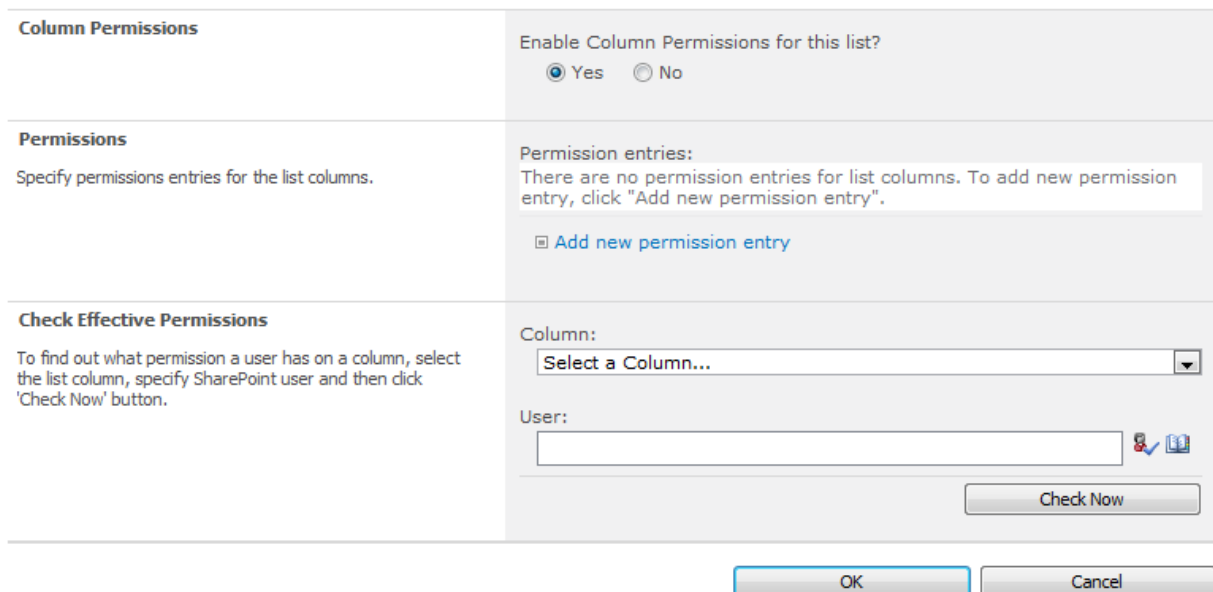
How to Use

To enable list column permissions, navigate to List Settings page and select "Column Permissions" action under Communications tab:



The screenshot shows the SharePoint interface for the 'Orders' list settings. The breadcrumb path is 'Column Permissions Demo > Orders > List Settings'. The left navigation pane includes 'Libraries', 'Lists', 'Discussions', 'Recycle Bin', and 'All Site Content'. The main content area is divided into three sections: 'List Information' (Name: Orders, Description:), 'General Settings' (Title, description and navigation; Versioning settings; Advanced settings; Validation settings; Audience targeting settings; Metadata navigation settings; Per-location view settings), and 'Permissions and Management' (Delete this list; Save list as template; Permissions for this list; Workflow Settings; **Column Permissions**). A mouse cursor is hovering over the 'Column Permissions' link, and a tooltip box labeled 'Column Permissions' is visible below it.

In Column Permissions Settings page select Yes under Enable Column Permissions for this list.

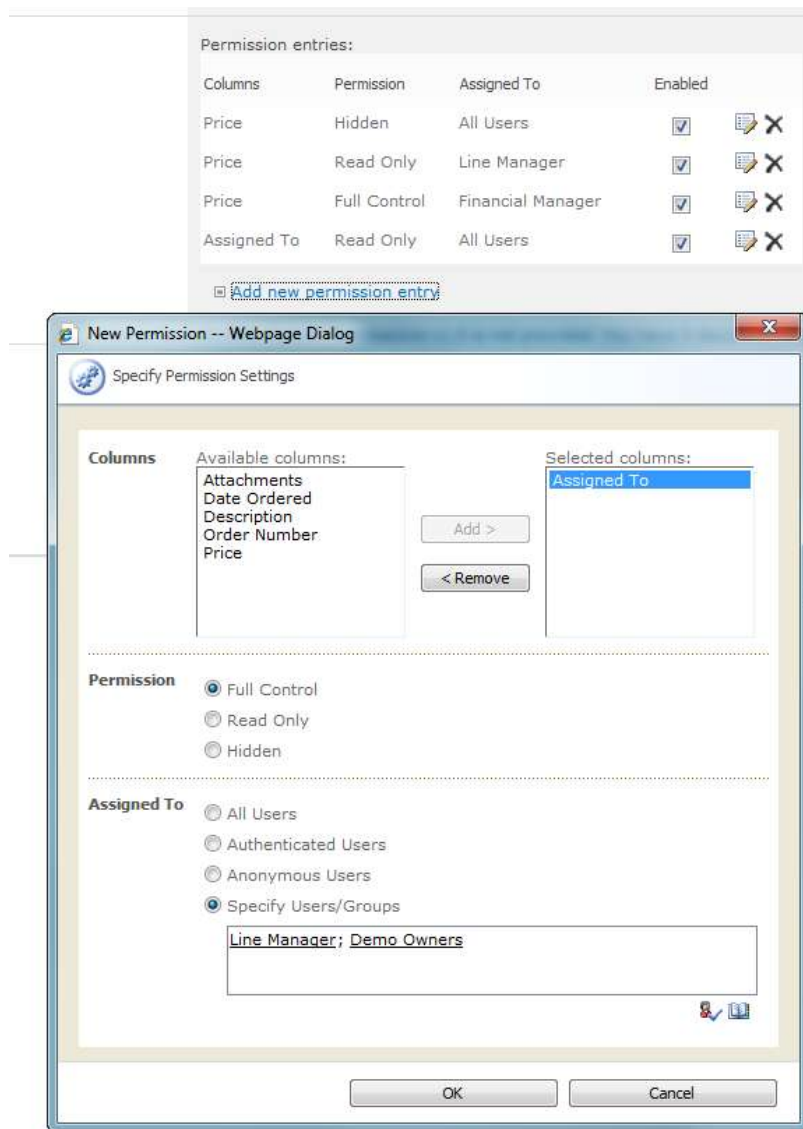


The screenshot shows the 'Column Permissions' settings dialog box. It has three main sections: 'Column Permissions', 'Permissions', and 'Check Effective Permissions'.
- **Column Permissions:** 'Enable Column Permissions for this list?' with radio buttons for 'Yes' (selected) and 'No'.
- **Permissions:** 'Specify permissions entries for the list columns.' with a message: 'There are no permission entries for list columns. To add new permission entry, click "Add new permission entry".' and a link: 'Add new permission entry'.
- **Check Effective Permissions:** 'To find out what permission a user has on a column, select the list column, specify SharePoint user and then click "Check Now" button.' with a 'Column:' dropdown menu (currently showing 'Select a Column...'), a 'User:' text input field, and a 'Check Now' button.
At the bottom of the dialog are 'OK' and 'Cancel' buttons.

List column permissions are configured by permission entries. The entire set of permission entries for (assigned to) specific column define user access to view or edit this column value. To add new permission entry click "Add new permission entry" link and provide the following values:

- **Columns** – Select one or more columns for which permission entry will be applied.
- **Permission** – Restrictions for user
- **Assigned To** – Users or SharePoint group, for which permission is assigned to. Possible values: All Users, Authenticated Users, Anonymous user and specified SharePoint users and groups.

To assign permission for individual users and groups, check Specified Users/Groups option and type their names or emails in people picker box.



To disable permission entry, uncheck checkbox in Status column of permission entry.

How Effective Permissions Are Determined

Each column can have set of permission entries associated with it. Effective permissions are calculated the following way:

- 1) Priority of permission entry depends on whom it is assigned for. The following list demonstrates assignments from the lowest priority to highest: All Users, Authenticated Users and Anonymous Users, SharePoint Groups, SharePoint Users.
For example, if you assign Hidden permission entry to All Users, Read-Only permission entry to SharePoint Group (Group1) and Full Control to some user (User1) for the same column, then
 - a. User1 will have Full Control. It is not dependent whether he is included to Group1 or not.
 - b. All users from Group1 will have read only access to this column.
 - c. Other users will have no access to column value.
- 2) If list contains Permission entries with the same priority and different permission level then that permission entry that has more access is effective. For example, if there are two permission entries (Full Control and Read Only) that are assigned to some user for the same column, then this user will have Full Control access for this column.
- 3) Order of permission entries does not matter.

ArtfulBits Column Permissions provides mechanism to check effective permissions. In Check Effective Permission section choose list column and specify SharePoint user to find out what permissions this user has on specified list column.

Check Effective Permissions

To find out what permission a user has on a column, select the list column, specify SharePoint user and then click 'Check Now' button.

Column:

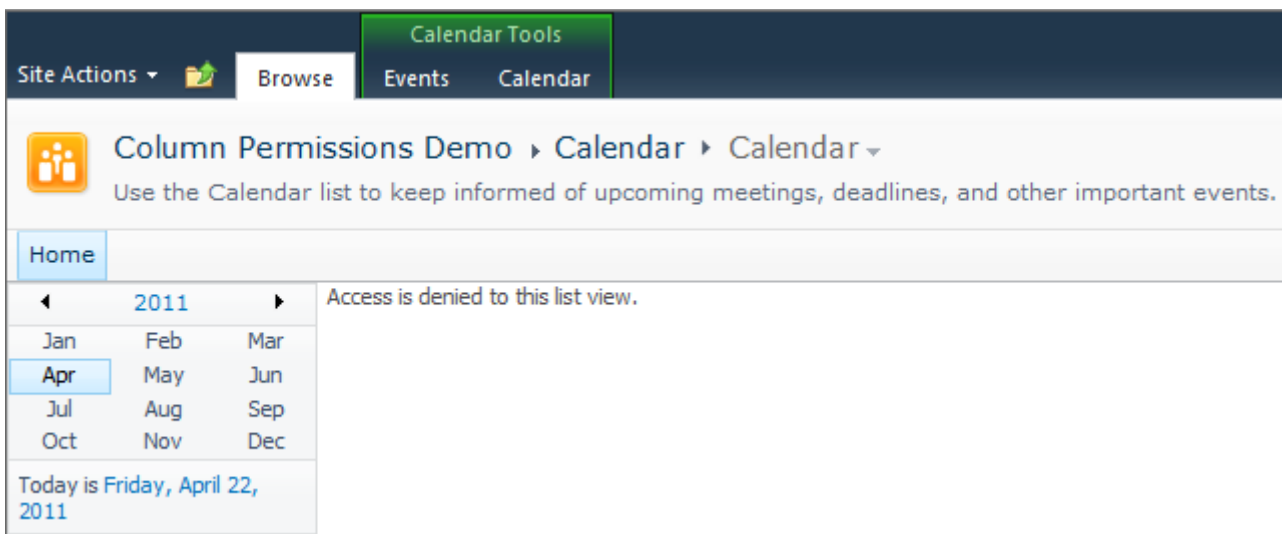
User:

Effective Permission: **Hidden**

Disabled column permission will not be applied to columns.

Limitations

1. ArtfulBits Column Permissions are not overriding SharePoint list permissions; they set additional restrictions to access individual column data.
2. Works only with standard SharePoint elements. Does not support InfoPath forms, Web Services and custom controls.
3. Does not work for search results.
4. Does not protect columns for Tasks and Calendar list opened with Outlook.
5. Limitations for Calendar and Gantt view. If user does not have permissions to view any column of this view, Calendar and Gantt view will be disabled. "Access is denied to this list view" message will be shown:



The screenshot shows a SharePoint interface for a calendar. At the top, there is a dark blue navigation bar with 'Site Actions' and 'Browse' buttons. Below this is a 'Calendar Tools' section with 'Events' and 'Calendar' options. The main content area has a breadcrumb trail: 'Column Permissions Demo > Calendar > Calendar'. Below the breadcrumb is a description: 'Use the Calendar list to keep informed of upcoming meetings, deadlines, and other important events.' A 'Home' button is visible. The calendar view shows a month view for 2011, with 'Apr' selected. A message 'Access is denied to this list view.' is displayed on the right side of the calendar. At the bottom, it says 'Today is Friday, April 22, 2011'.

Best Practices

- You want to disable editing of some columns in SharePoint list only for specific users.
Add new permission entry and
 1. Select these columns in Columns section
 2. Set Permission to Read Only
 3. Check Specified Users/Groups option in Assigned To block and type these users/groups.

- You want to allow editing of few columns only for specific users, groups.
It is recommended to restrict access to these columns to all users and set full control access to specific users/groups. For it:
 1. Add Read Only permission entry assigned to All Users for these columns.
 2. Add Full Control permission entry assigned to these users/groups.

- You want value of some column to be hidden for all users except several users or groups, for which it should be read only. This column can be edited only by Site Owner group.
 1. Add Hidden permission entry assigned to All Users
 2. Add Read Only permission assigned to these few users or groups, for which these columns should be read only.
 3. Add Full Control permission assigned to Site Owner group.

Release Notes

Version	Notes
v1.0 (April 23, 2011)	Initial Release

See Also



[KPI Column](#)

KPI (Key Performance Indicator) Column is simple graphical scorecards that can be used to evaluate business data against business goals. With this column you reduce risk to overlook information about the status of value.



[Category Column](#)

Category Column allows tracking, organizing and grouping list items. Outlook 2007 approach for elements categorization, easy indicator color changing and using of advanced tooltip, provide a high professional component style.



[Progress Column](#)

Progress Column provides users with the ability to make SharePoint lists more visualized by displaying numerical data on the page sing percentage-based progress bar. Professional progress bar style will make your SharePoint list really modern and stylish.



[Follow-Up Column](#)

Follow-Up Column enables due date flags similar to Outlook follow-up functionality. Applying of flags to the list item allows adding of visual reminder in a natural way.



[Image Upload Column](#)

Quick and simple way of uploading pictures. Image Upload Column provides with ability to select a picture using file browsing dialog, upload and display it in the list view.



[Discussion Column](#)

Need to organize well formatted conversation in the list item without enabling list versioning? Discussion Column is the right choice. Component allows entering rich text with formatting, images, tables, hyperlinks and other features.



[Cross-Site Lookup Column](#)

Use Cross-Site Lookup Column for getting data from any site within site collection. Component includes a powerful function of searching over lookup list. This function provides substring matching in selected column which is very useful for large lists (over 50-100 items).



[Parent Selector Column](#)

Parent Selector Column is used for organizing hierarchical relations in SharePoint list. Picker dialog allows choosing data from large lists. Standard Lookup column can be easily converted to Parent Selector column and vice versa.

Remarks

Some information in this document may be outdated. Please, visit www.artfulbits.com for the latest product version.