Column Permissions App

User Guide
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INTRODUCTION

GENERAL

This document provides all the information needed to install, evaluate and deploy this KWizCom product:

- Product Overview
- Installation Guide
- Administration Guide
PRODUCT OVERVIEW

With the **Column Permissions app** you can dynamically control the visibility of specific list form fields. This way you can turn your SharePoint list forms into dynamic forms where certain fields are hidden or inactive according to the current user and the current user’s input.

KEY FEATURES

<table>
<thead>
<tr>
<th>Feature</th>
<th>KWizCom Column Permissions App</th>
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<tr>
<td>Display/hide fields from list forms (New/Edit/View item) to/from specific users or SharePoint groups.</td>
<td>✓</td>
</tr>
<tr>
<td>Disable fields for specific users or SharePoint groups.</td>
<td>✓</td>
</tr>
<tr>
<td>Dynamic permission rules: hide/disable fields according to a criteria based on list fields' values.</td>
<td>✓</td>
</tr>
<tr>
<td>Support [Me] and [Today] SharePoint tokens in field-based criteria for hiding/disabling fields</td>
<td>✓</td>
</tr>
<tr>
<td>Save field permission settings within site and list templates</td>
<td>✓</td>
</tr>
<tr>
<td>Hide columns from list views</td>
<td>✓</td>
</tr>
<tr>
<td>Hide/disable fields in the Quick Edit view</td>
<td>✓</td>
</tr>
</tbody>
</table>
INSTALLATION

SOFTWARE REQUIREMENTS

SERVER REQUIREMENTS
- SharePoint Server/Foundation 2013 configured for app hosting
- SharePoint online (Office 365)

CLIENT REQUIREMENTS
- Windows 7+
- Microsoft Internet Explorer 9+, Mozilla Firefox (Latest version), Google Chrome (Latest version).

INSTALLATION PROCEDURE

To download and install this app please follow these steps:

- Browse the product page on Microsoft’s Office app store: https://store.office.com/kwizcom-dynamic-column-permissions-WA104379353.aspx?assetid=WA104379353
- Install the free version. This version includes a message that indicates that this is a free trial version.
After you install the Column Permissions app, you will see its ribbon button in every list’s “List” ribbon:

Clicking this ribbon button will open the list’s Column Permissions settings page:
This settings page allows you to create column permission rules, each rule hides, shows or deactivate a selected field. After you have configured your rules and saved them, these rules will be processed according to their order every time a list form (New, Edit, View) is loaded, and each time a user makes selections in the form.

To setup a column permissions rule, follow these steps:

1. Select a column that you wish to hide/deactivate/show in the “Select a column” drop-down:

2. Create a new rule by clicking the “new rule” link:

3. To setup a rule you need to:
a. Select the list forms to which this rule should be applied:

![Rules](image)

**COMMENT:**
Here you can also choose “list views” if you want to apply a rule to all list views (example: hide a column from all list views).
However due to performance considerations, you cannot apply a column permission rule to list views if the rule includes column-based condition.

b. Select the permission type:

![PermissionType](image)

c. Setup conditions. These conditions define when the column permission should be applied. You can create several conditions as you can see in the following screenshot:

![Conditions](image)

After you click the “Apply” button at the bottom of the page, the rule is saved and a human-readable sentence describing the rule is displayed:
4. After you save the rule by clicking “Apply” or “Save” this rule will appear below the “All Rules” section:

To edit an existing rule, simply click the “Edit” link appearing on the left side of each existing rule.