

KWizCom Corporation



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 field are hidden or inactive according to the current user and the current user's input.

KEY FEATURES

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

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).

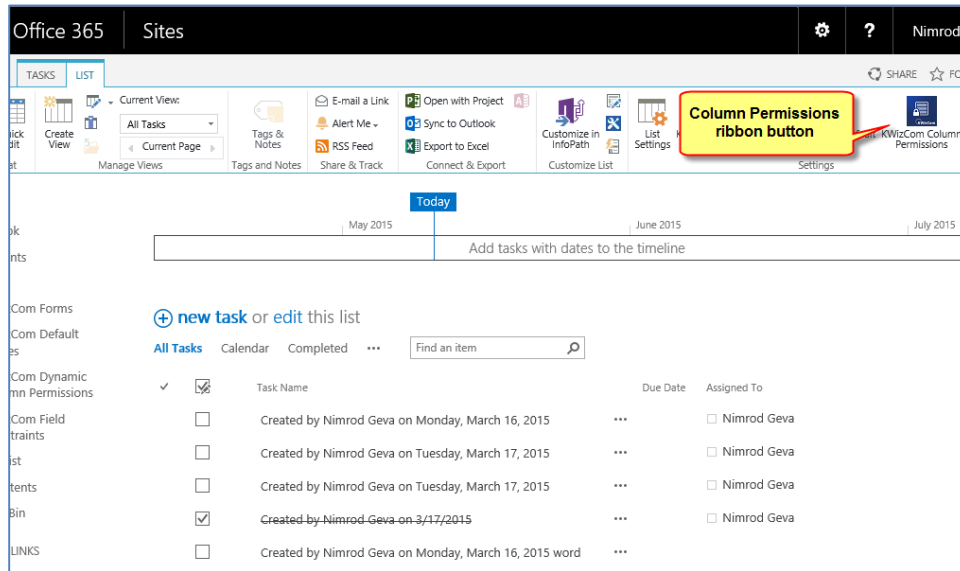
INSTALLATION PROCEDURE

To download and install this app please follow these steps:

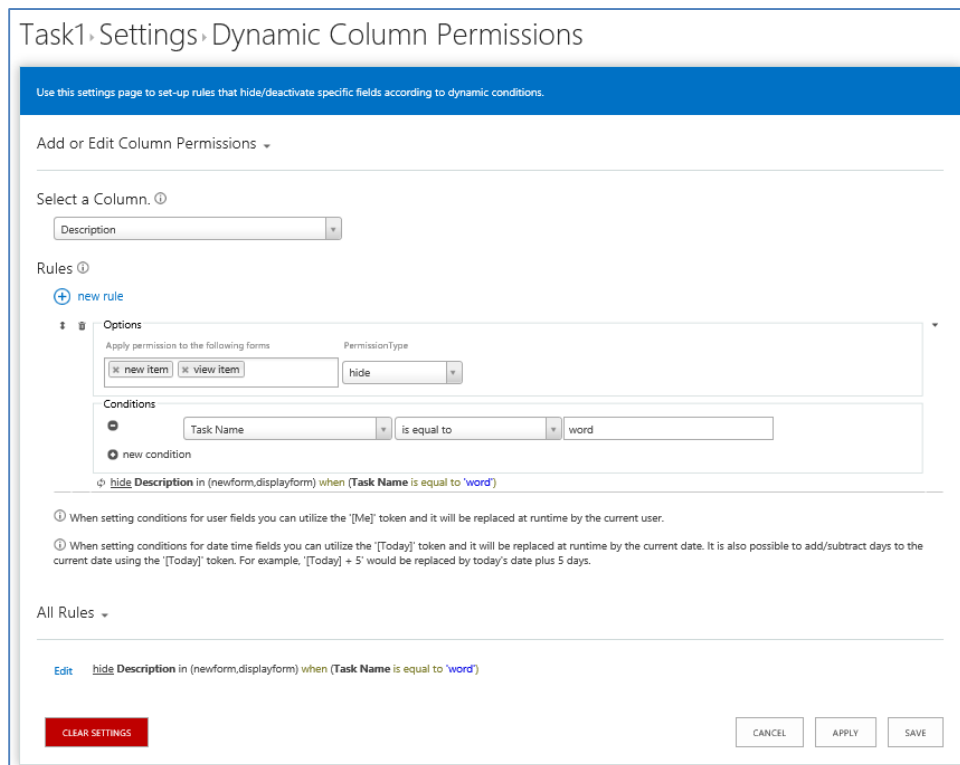
- Browse the product page on Microsoft's Office app store:
<https://store.office.com/kwizcom-dynamic-column-permissions-WA104379353.aspx?assetid=WA104379353>
- Install the free version. This version includes a message that indicates that this is a free trial version.

ADMINISTRATION GUIDE

After you install the Column Permissions app, you will see its ribbon button in every list's "List" ribbon:



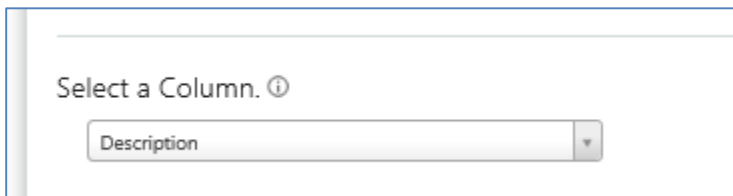
Clicking this ribbon button will open the list's Column Permissions settings page:



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.

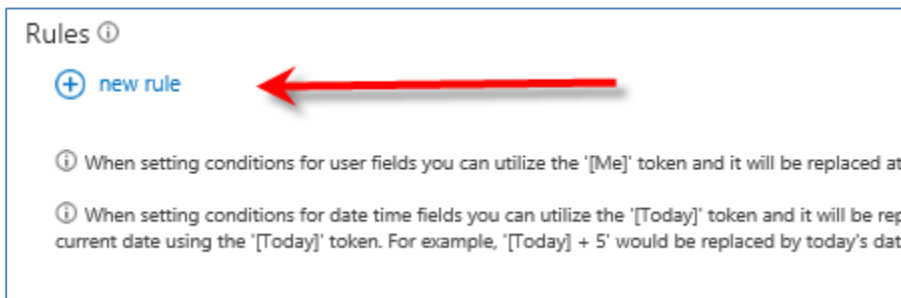
To setup a column permissions rule, follow these steps:

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



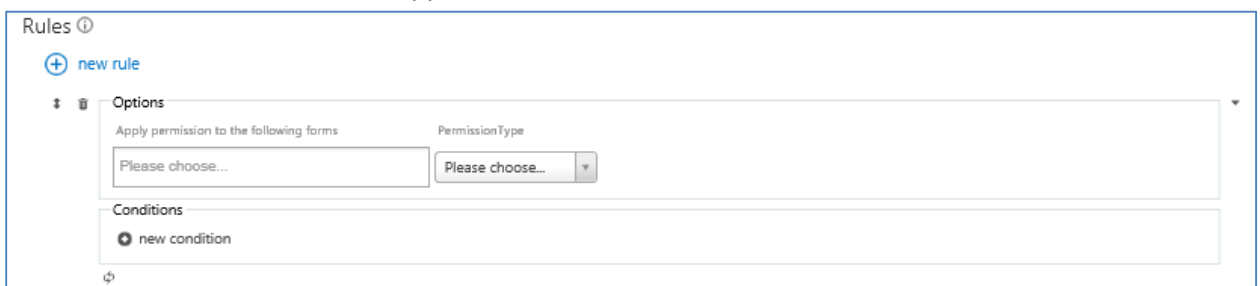
A screenshot of a web form element titled "Select a Column. ⓘ". Below the title is a dropdown menu with "Description" selected and a downward arrow on the right side.

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



A screenshot of a web form section titled "Rules ⓘ". At the top left is a blue "+ new rule" link. Below it are two informational icons with text: "When setting conditions for user fields you can utilize the '[Me]' token and it will be replaced at..." and "When setting conditions for date time fields you can utilize the '[Today]' token and it will be repl... current date using the '[Today]' token. For example, '[Today] + 5' would be replaced by today's date...". A red arrow points from the right towards the "new rule" link.

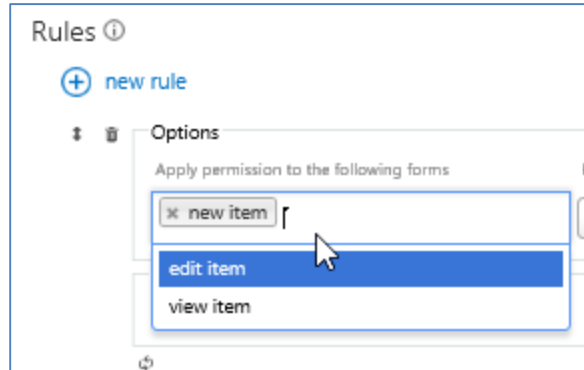
a new rule definition section will appear:



A screenshot of the "new rule" definition form. It is titled "Rules ⓘ" and has a "+ new rule" link. Below the link is a section titled "Options" with a plus icon and a minus icon. Under "Options", there is a label "Apply permission to the following forms" and a text input field with "Please choose...". To the right is a label "PermissionType" and a dropdown menu with "Please choose..." and a downward arrow. Below the "Options" section is a section titled "Conditions" with a plus icon and a minus icon. Under "Conditions", there is a "+ new condition" link. At the bottom left of the form is a small icon of a hand with a mouse cursor.

3. To setup a rule you need to:

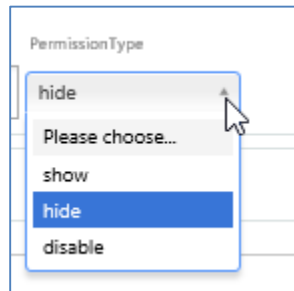
- a. select the list forms to which this rule should be applied:



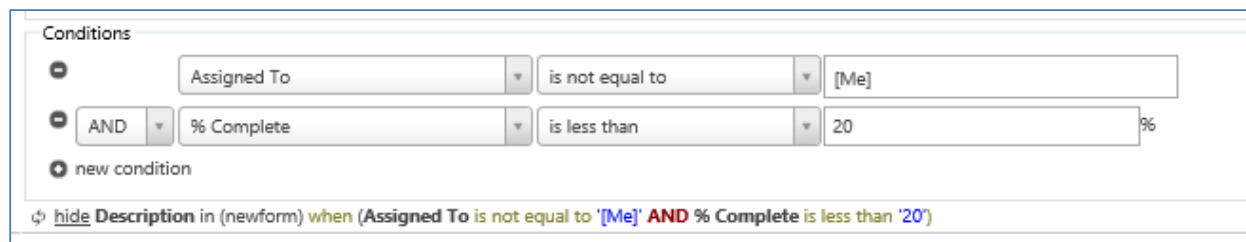
COMMENT:

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:



- 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:



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:

hide Description in (newform) when (Assigned To is not equal to '[Me]' AND % Complete is less than '20')

4. After you save the rule by clicking “Apply” or “Save” this rule will appear below the “All Rules” section:

The screenshot shows a rule configuration window. At the top, it says 'Options' and 'Apply permission to the following forms'. Below that, there's a text input field containing 'new item' and a dropdown menu for 'PermissionType' set to 'hide'. Under 'Conditions', there are two conditions: 'Assigned To' is not equal to '[Me]' and '% Complete' is less than '20'. Below the conditions, the rule text is displayed: 'hide Description in (newform) when (Assigned To is not equal to '[Me]' AND % Complete is less than '20')'. There are two informational notes below the rule text. At the bottom left, there's a section labeled 'All Rules' with a red arrow pointing to it. Below that, there's an 'Edit' link followed by the rule text. At the bottom, there are three buttons: 'CLEAR SETTINGS', 'CANCEL', 'APPLY', and 'SAVE'.

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