

USER GUIDE

SharePoint Column Protector v 1.2.3.0

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Thank you for using SharePoint Column Protector!

We hope that you will find our product useful. If you have any comments or questions please contact us by channels mentioned in troubleshooting sections. We will gladly help you with any issues you may encounter.

Please take time to read the following user guide, which will help you to use all features of our product.

This user guide is divided into 3 sections:

- Setup – information how to install SCP, buy license and activate it and activate SCP feature on the portal farm
- Configuring – describes the concept of SCP administration pages and explains how to assign permissions to columns. Also contains list of limitations of SCP
- Troubleshooting – information what to do in case something goes wrong.

1 Setup

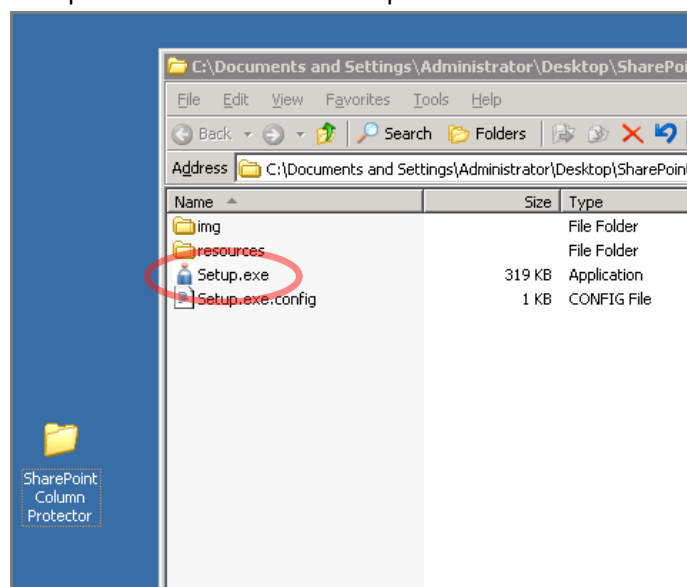
1.1 SCP Installation

To install SharePoint Column Protector please unzip provided compressed folder (SharePointColumnProtector.zip) to a chosen location on any front-end server of the SharePoint farm where you want to deploy SCP.

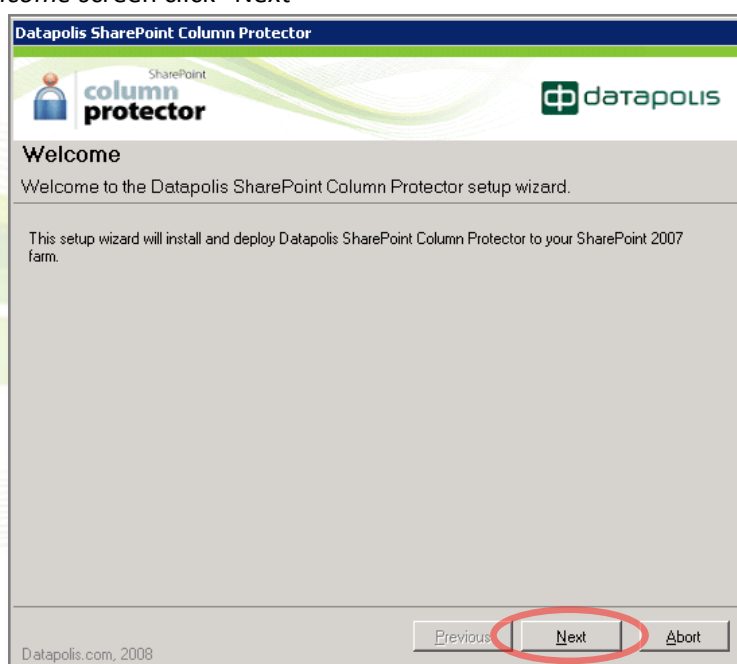
Setup configures SCP on all front-end servers in the farm, so there is no need to run the setup on all servers.

Note: You need to have administration rights to the server and the portal to install SCP.

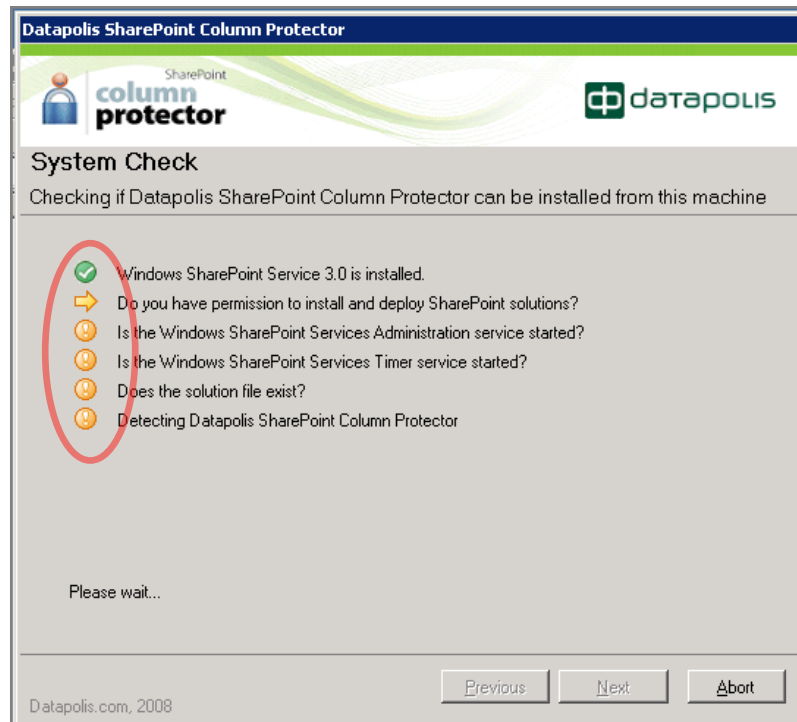
1. Open unzipped folder.
2. Double click "setup.exe" file to start the setup wizard:



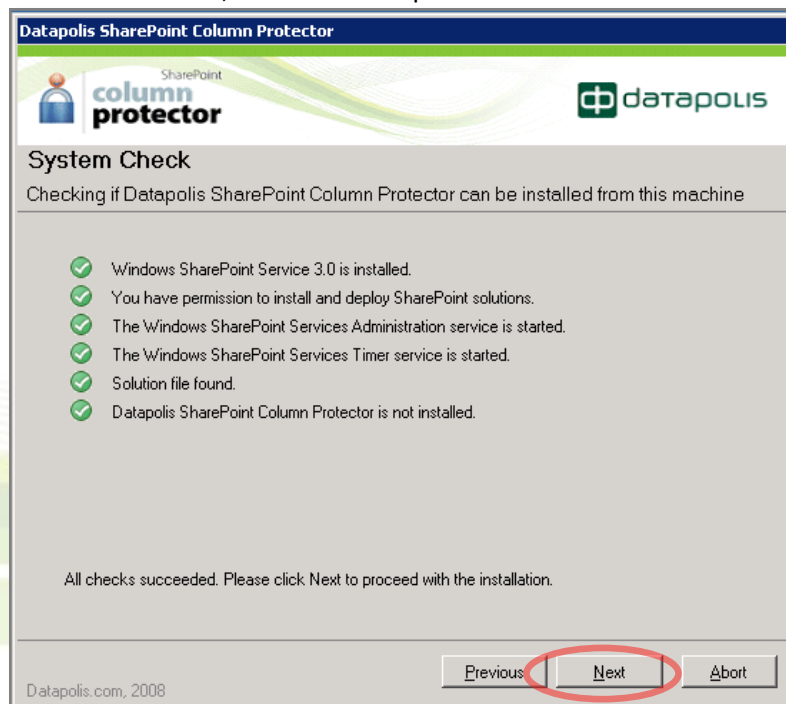
3. On the *welcome* screen click "Next"



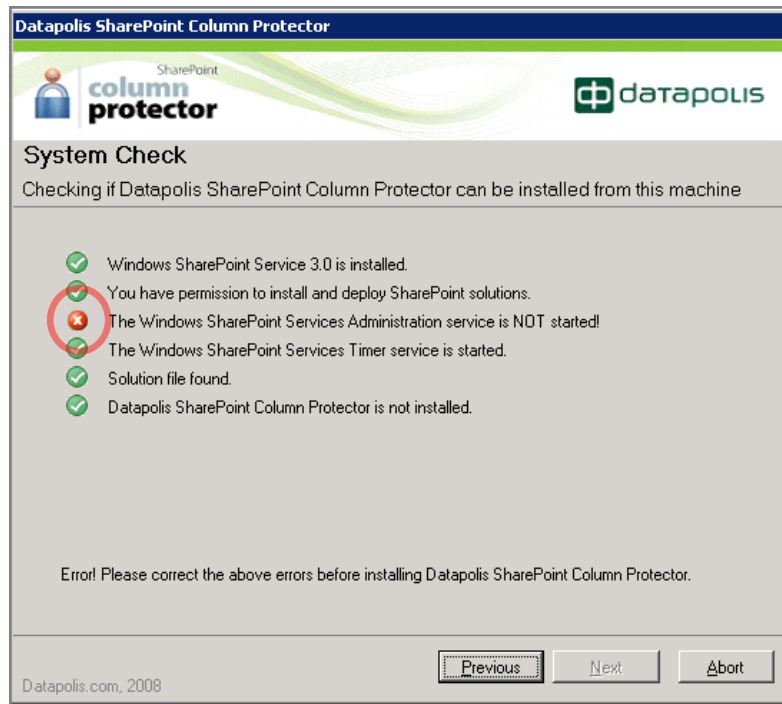
4. During this step SCP will diagnose and check all required configurations. Please wait, until all checks are processed – all yellow icons should change to green.



5. If all requirements are met, click “Next” to proceed.



6. If you see any errors, you need to correct them. After correcting errors, please close the wizard and run setup again. For help with installation errors please refer to troubleshooting section of this guide.

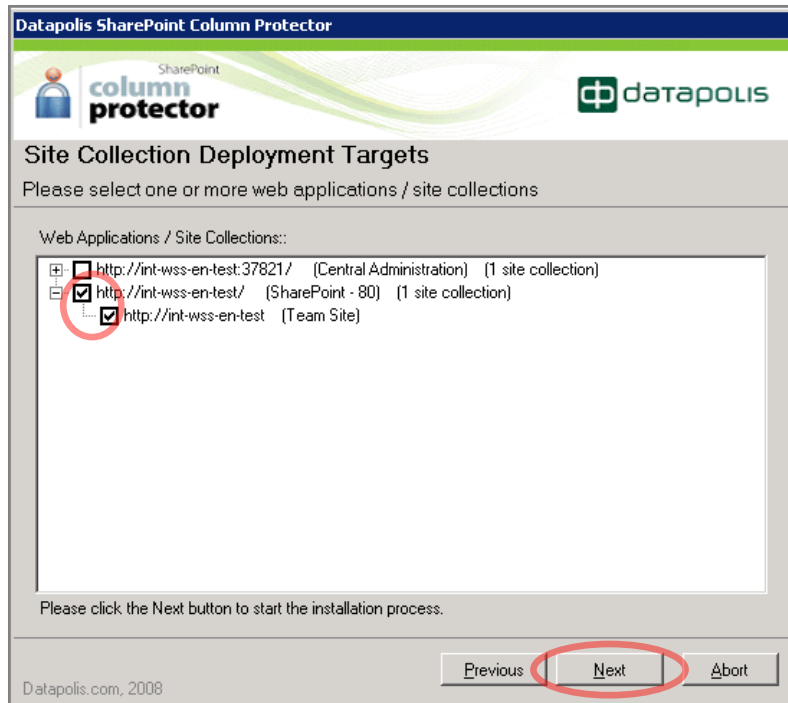


If SharePoint Column Protector is installed you will be taken to repair/remove screen. Please see "Repair/remove" section of this user guide.

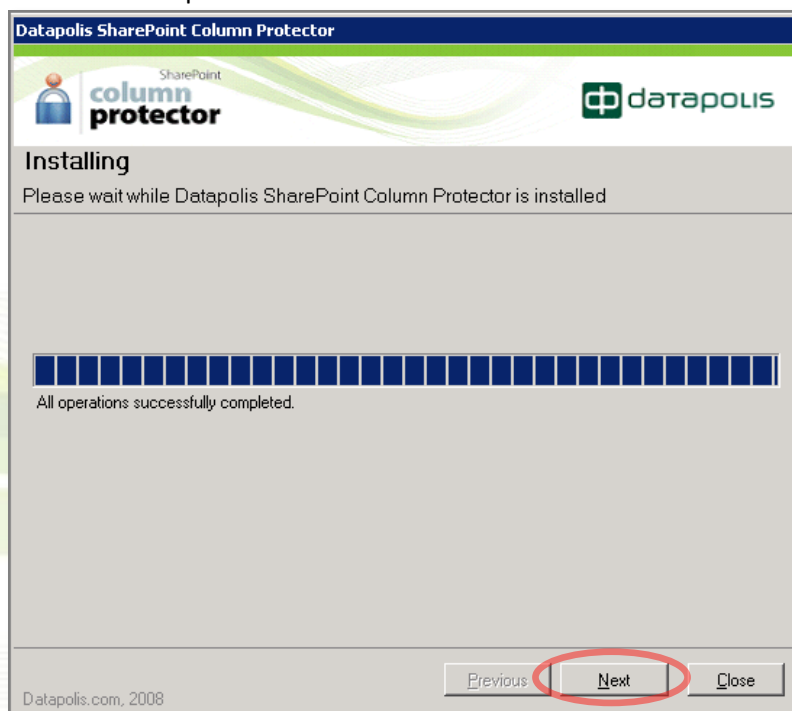
7. You need to accept the End User License Agreement (EULA) to use SCP and continue the setup. Please read the EULA and if you accept it check the checkbox under agreement text and click "Next"



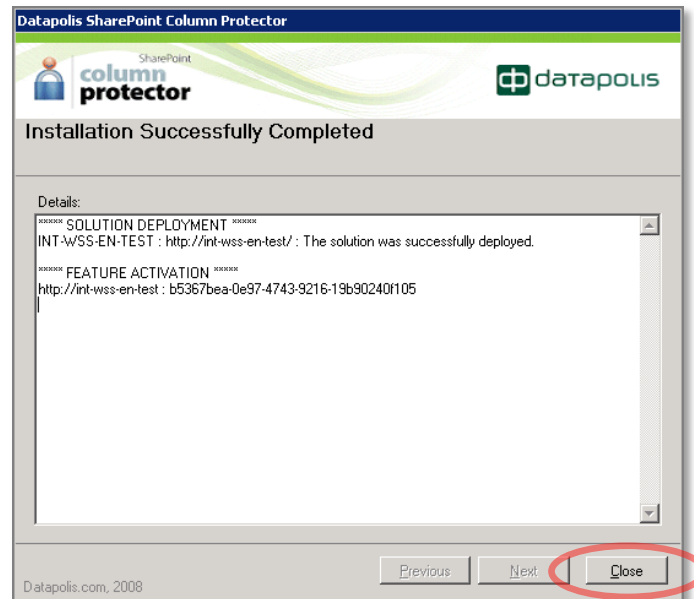
8. Select web applications to which you want to deploy SCP. You can choose one or more web applications or site collections. To view list of site collections click “Plus” icon next to application name. You need to select at least one to continue with the setup. Click “Next” to continue.



9. Please wait for the setup to deploy the solution. Depending on your farm configuration it can take from 30 seconds up to 15 minutes. Click “Next” to continue.



10. Please check the details to see if solution was properly installed and feature was activated on all selected web applications and site collections. Click “Close” to finish setup.



After the setup was successfully finished you can use SharePoint Column Protector on web application and site collections where SCP was deployed. Please refer to “Configuring” chapter of this guide for information on how to use SCP.

1.2 Licensing

SharePoint Column Protector has a trial period of 30 days. After 30 days from installation trial period will expire and SCP will stop working. If you want to continue using it, you should buy a license on <http://partner.datapolis.com.pl>.

Note: You can buy and register SCP any time – during the trial period or after the trial has expired. We recommend licensing your copy of SCP before trial period expiration to avoid SCP deactivation.

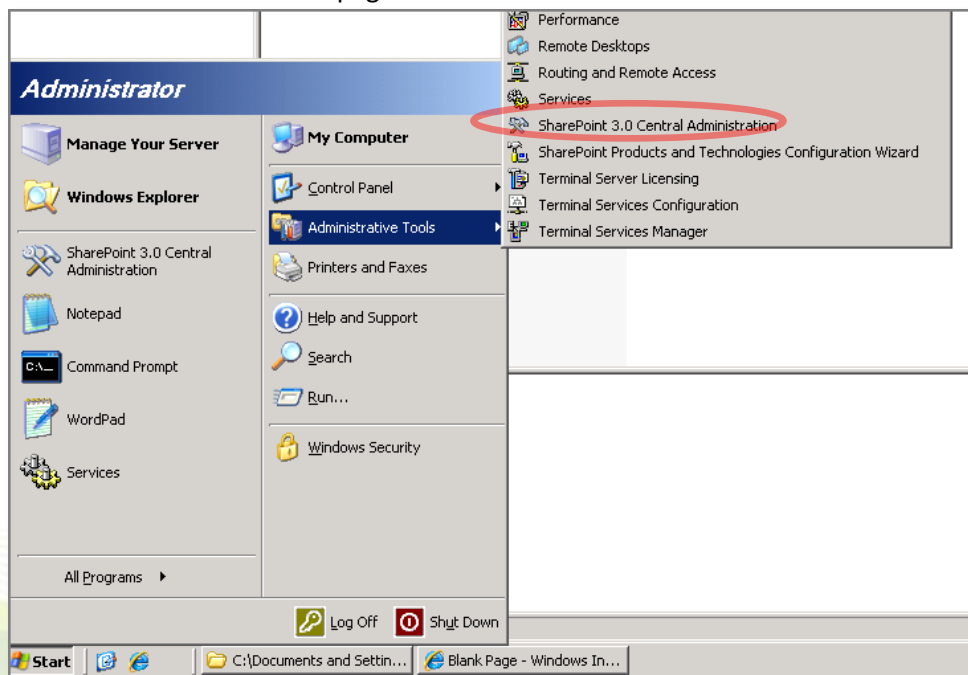
Note: All SCP setting are preserved even if trial expires. When you activate SCP after trial period SCP will start working with the same configuration as on last run in trial period.

To activate SCP on server farm you need to:

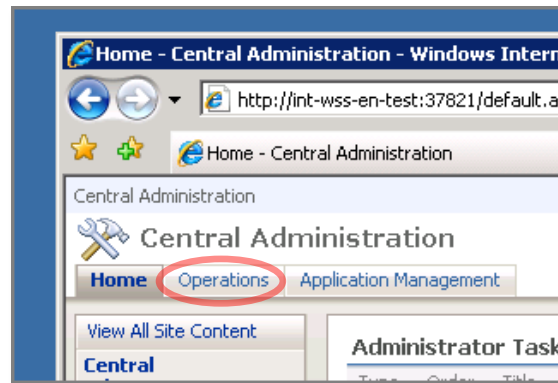
1. Purchase license for SCP on our website - <http://partner.datapolis.com.pl/en/customer/pages/buy.aspx> . You can use a link provided on the license management page. **Note the order ID.**
2. Go to license management page

Note: SCP is licensed per server farm and number of users. **You cannot transfer your license from one server farm to another once you have generated License Key based on Product Key for given farm.**

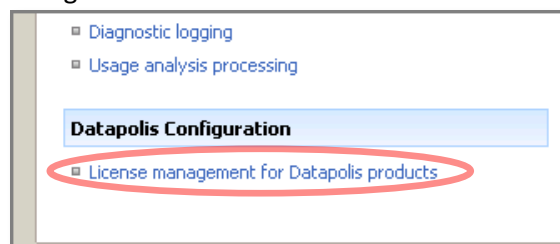
 - a. Go to central administration page of the server farm



- b. Go to "Operations" section by clicking on "Operations" tab on top menu

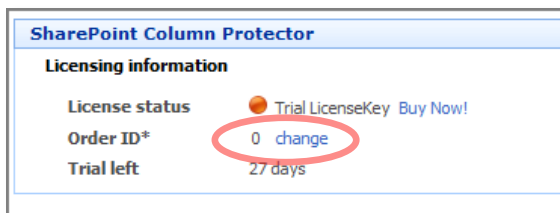


- c. On the *Operations* page click “License management for Datapolis products” link under “Datapolis Configuration” header.

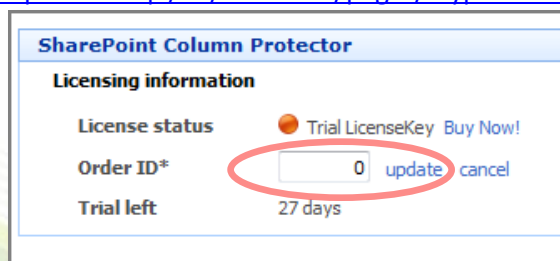


3. Generate Product Key for your installation of SCP on given farm.

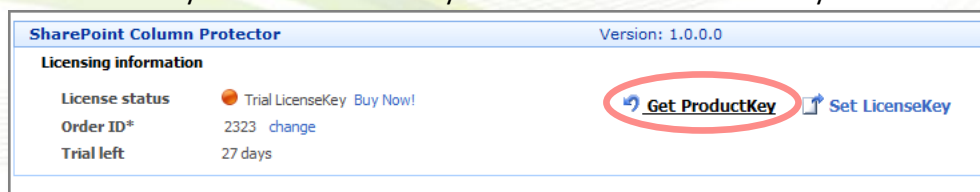
- a. On the “License management” page find SharePoint Column Protector and click “Change” next to “Order ID”. Note that license status is “Trial LicenseKey”.



- b. Input Order ID into the textbox and click “Update”. You can find order number on your product list on <http://partner.datapolis.com.pl/en/customer/pages/myproducts.aspx>.



- c. After you input Order ID, screen will reload and you will have two new buttons – “Get ProductKey” and “Set LicenceKey”. Click on the “Get ProductKey” button.

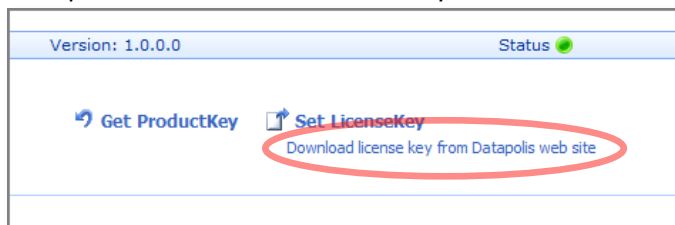


- d. You will receive a file to download. Download it and save on your disk in convenient localization.

Note: If you do not receive the file, check whether it was not blocked by your browser.

4. Generate license key

- a. Go to <http://partner.datapolis.com.pl/en/customer/pages/myproducts.aspx> page. You can use a link provided below “Set LicenceKey” button.



- b. Find order with purchase of SCP where the Product Key was not submitted and upload Product Key file.

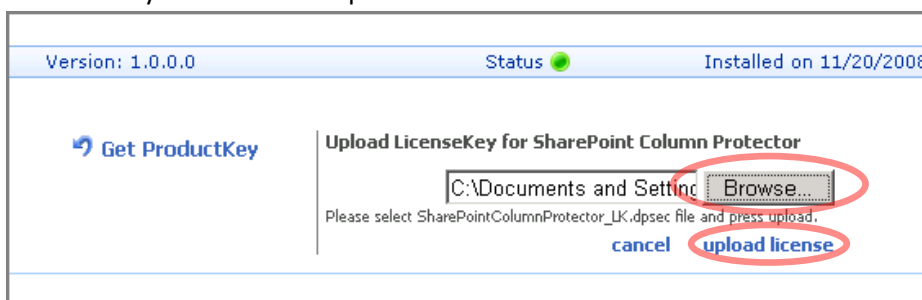
Note: You can submit product key only once for every order. Please make sure you are submitting correct product key.

- c. Click on “Download License Key”. You will receive a file to download. Download it and save on your disk in convenient localization.

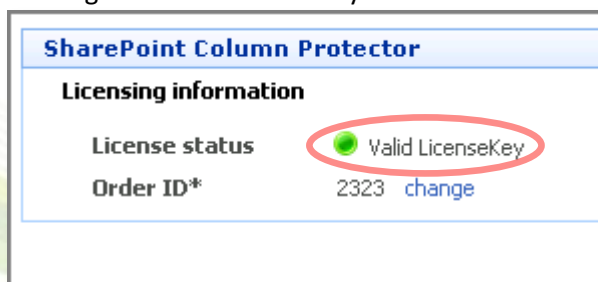
Note: If you do not receive the file, check whether it was not blocked by your browser.

5. Activate product with license key

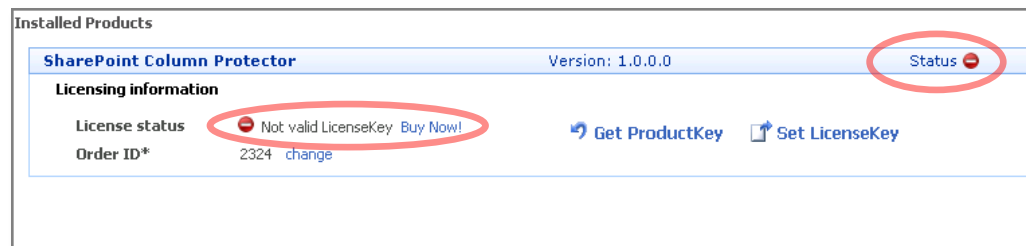
- a. Return to *License Management* page and click “Set license Key” button. Browse for the License Key file and click “Upload license” link.



- b. If provided license key is valid for this product, server farm and order number, license status will change to “Valid LicenseKey”.



- c. If provided license key is invalid – eg. product key used to generate License Key was generated from another server farm or for another order ID or trial has expired, license status will change to “Not valid LicenseKey” and product status will change to “not valid”.



Note: SCP will stop protecting columns if product status is “Not valid”.

1.3 Feature activation

SharePoint Column Protector feature is active after the setup, and you can use it right away.

Note: If you reinstall SCP using “Repair” option in the setup wizard, the all feature states will be maintained – activated features will be active, deactivated will be inactive.

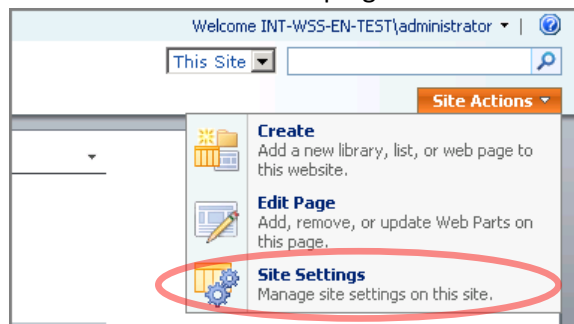
If feature was deactivated or the setup was unable to activate the feature, you need to activate SCP feature before you can use it.

If you don’t see link to SCP administration on SharePoint list settings menu, then probably you need to activate it for the site collection that hosts this list.

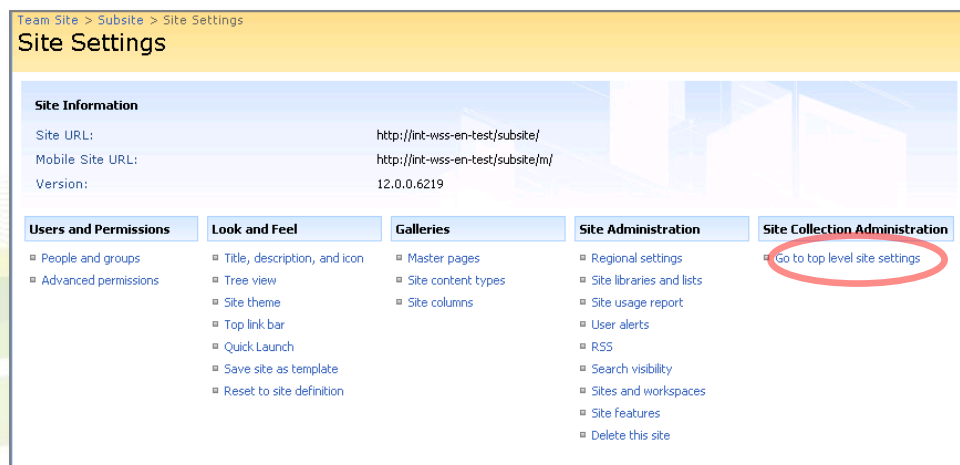
Note: To activate feature you need “Manage Web Site” permissions on site collection.

To activate the feature:

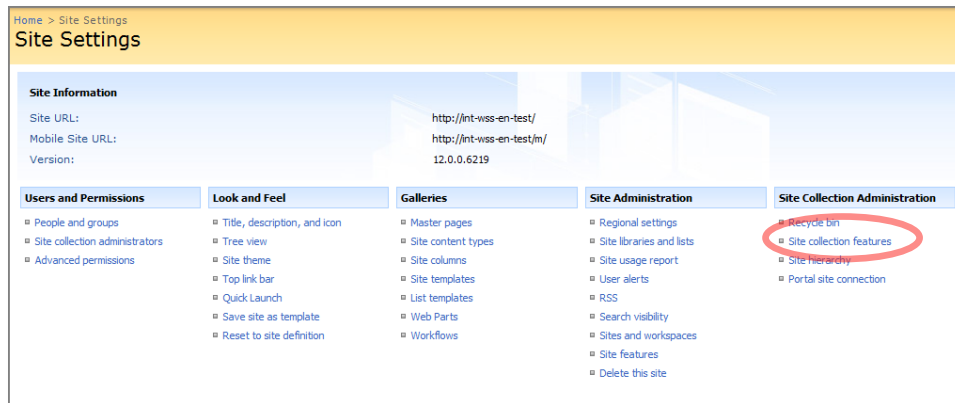
1. Go to site collection administration page. If you are on site collection top site, choose “Site settings” from “Site actions” menu on the top right side.



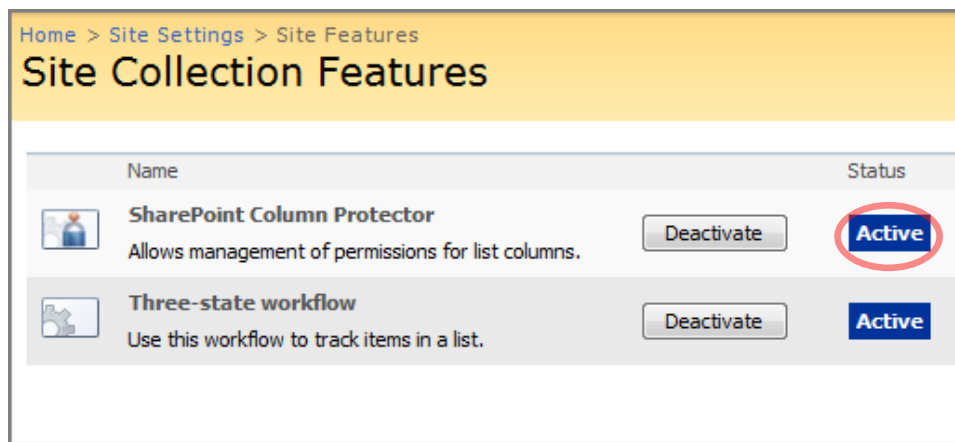
2. If you are on one of site collection subsites then go to site setting as described above, and then click “Go to top level site settings” link in the rightmost column with “Site Collection Administration” header



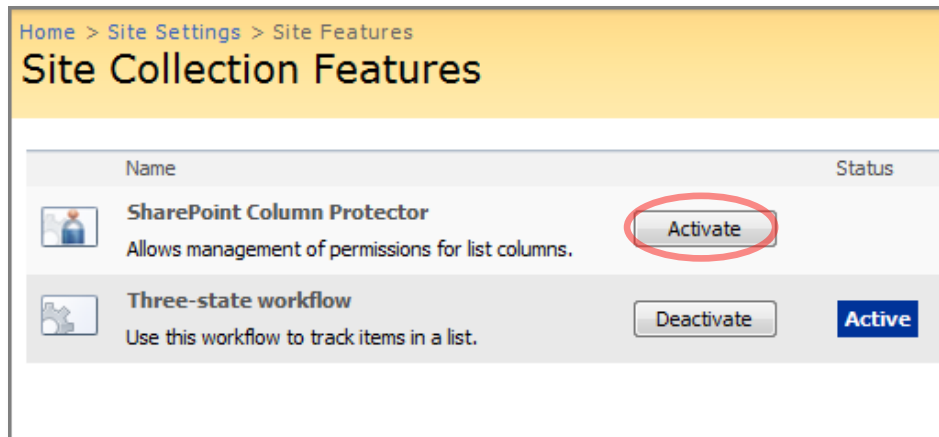
3. On the site collection “Site Settings” page click “Site collection features” link in the rightmost column with “Site Collection Administration” header.



- See if status of SharePoint Column Protector is “Active”.



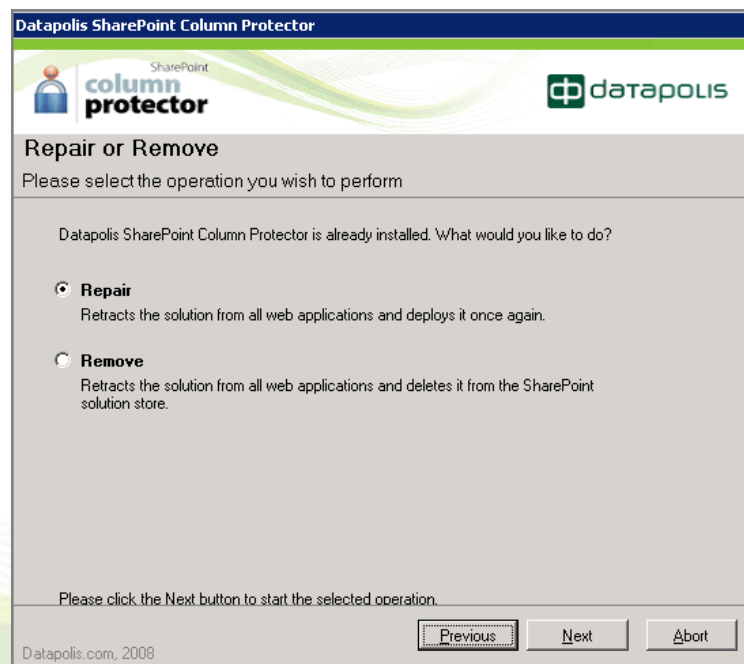
5. If feature is not active, click “Activate” button to activate the SCP feature.



1.4 Repairing/removing SCP

If by any reason - deleted files, version upgrade or malfunction - you want to repair SharePoint Column Protector installation, run Setup application as described in “SCP Installation” chapter above.

1. After all configuration checks are passed (screen in point 5 in installation chapter) you will come to “Repair or Remove” screen



2. To repair SCP installation chose “Repair” and click “Next”. SCP will be uninstalled and reinstalled. No configuration data will be lost.
Note: SCP feature will be deactivated. You will have to activate it manually for each site collection (see “Feature activation” chapter for details).
3. To remove SCP from your farm choose “Remove” and click “Next”. SCP will be removed from your SharePoint farm. You can install it again later.
Note: SCP configuration files for each list will not be removed. To remove the files, you have to delete the XML file from every list catalog manually.

2 Configuring

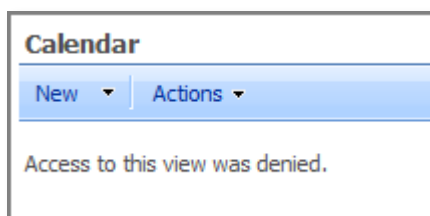
SharePoint Column Protector is configured for each list separately.

SCP provides two types of permissions – “Allow display” and “Allow edit and display”:

- “Allow display” permissions allows viewing column data on forms and list views., columns where user has only “Allow display” permission are not visible on “add new item” and “edit item” forms.
- “Allow edit and display” permissions allows viewing column data on “display item” form and list views and viewing and editing column data on “add new item” and “edit item” forms.
- If user is has neither of these two permissions assigned, then user is not allowed to view the column on forms and list views

If user has “Allow display” and “Allow edit and display” permissions to the same column, then user has “Allow edit and display” permissions to this column.

If user tries to enter a list view with column that given user has no right to view, view will be hidden, and user will receive following information:



2.1 Limitations

1. SCP protects columns only within SharePoint Web GUI.

If you connect to a list through other interfaces (eg. Web Dav, Excel, Access, Web Service, etc.) SCP will not protect these columns. You can disable access through other interfaces by creating new permission level without “Use Remote Interfaces” permission on site collection permission settings and assigning it to list. More on SharePoint permissions: <http://office.microsoft.com/en-us/sharepointtechnology/HA101001431033.aspx?pid=CH100649861033>.

Also, the column content may appear in the search results.

2. SCP works only with web parts with full toolbar.

SharePoint Column Protector protects only these list view Web Parts which have full toolbar enabled. Due to SharePoint API limitation, current version of SCP does not support list view Web Parts that have summary toolbar or no toolbar. **Remember to enable full toolbar on list view Web Parts for the list you want to protect.**

3. SCP does not work with wiki libraries

4. To configure SCP user must have *Manage List* permission for the list

User must be granted *Manage List permissions* for the list to see administration link and be allowed to view administration pages and commit changes.

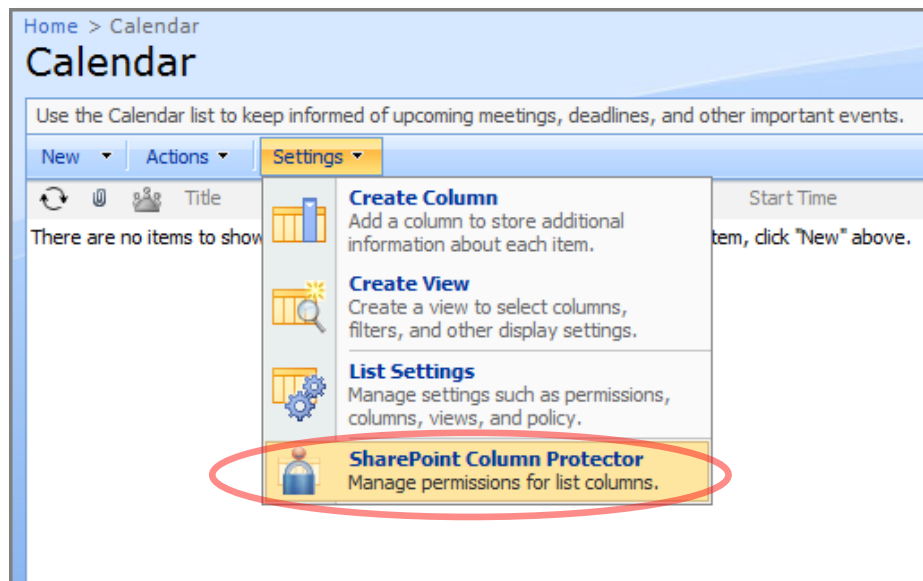
Note: If the list is inheriting permissions from the site, user needs *Enumerate Permissions* for site.

5. SharePoint Column Protector shows all columns to users with *Manage List* permissions.

SharePoint Column Protector shows all columns to users with *Manage List* permissions for given list. In other words, SCP is transparent to these users and column permission settings do not apply to them.

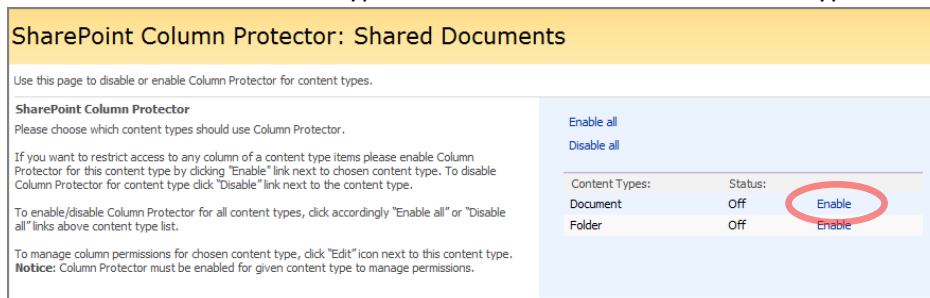
2.2 Enabling SCP for content type

1. On a page containing list with full toolbar, click “Settings” in the list toolbar and then choose “SharePoint Column Protector”

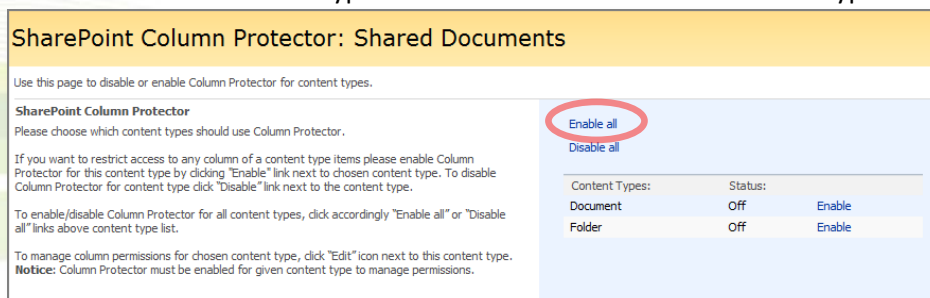


or on the “List Settings” page click “SharePoint Column Protector” link.

2. On main SharePoint Column Protector page you can choose which content types use SCP to manage column permissions. If SCP is disabled for given content type, then its status is “Off”. To enable SCP for this content type click “Enable” link for this content type.

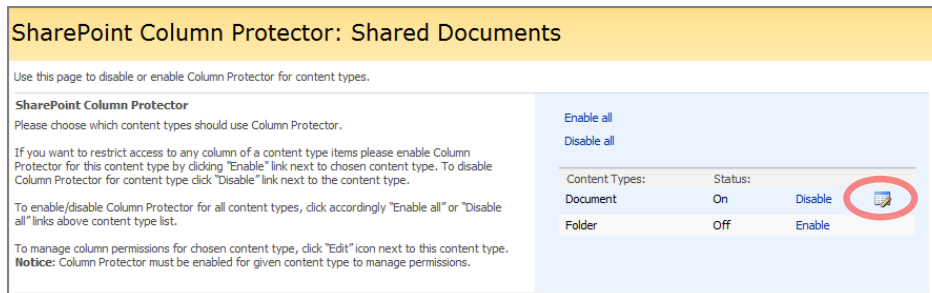


3. To enable SCP for all content types click “Enable all” link above content type list.

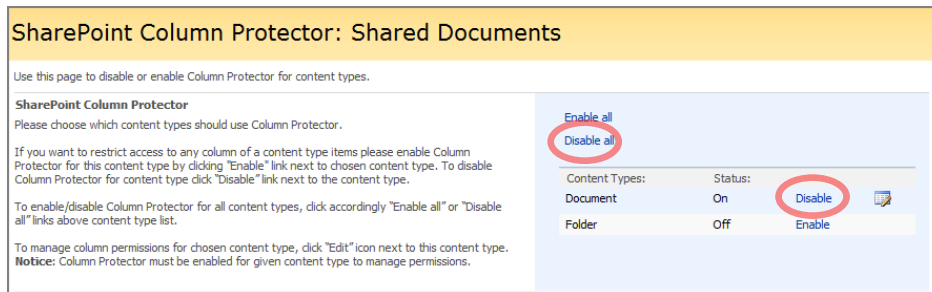


4. To manage column permissions for chosen content type, click “Edit” icon next to this content type.

Notice: Column Protector must be enabled for given content type to manage permissions.



5. You can disable SCP for content type, by clicking “Disable link” next to the content type. To disable SCP for all content types on this list, click “Disable all” link. Disabling SCP will not reset settings – if you enable SCP again, all permission settings will be kept.



6. If you want to reset SCP settings for this list click “Reset permissions” button – this will delete settings for each column for each content type on this list and disable SCP for all content types on this list.

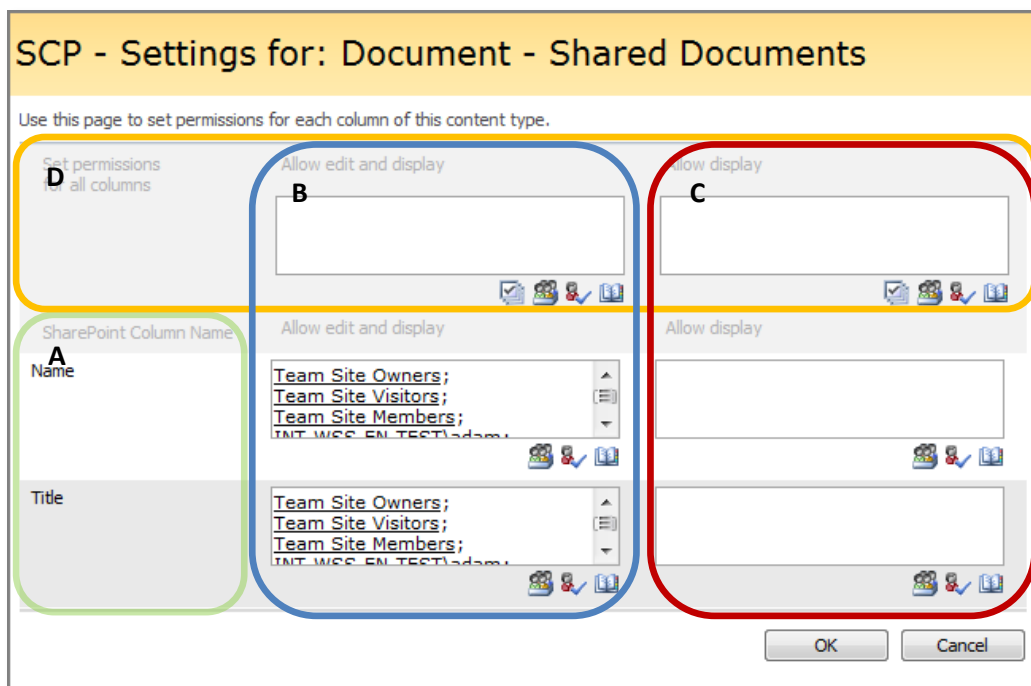


2.3 Configuring permissions for columns

2.3.1 Administration page

“Settings for content type” page consists of following items:

- “Column name” column (green section) – contains names of columns for chosen content type
- “Allow edit and display” permissions column (blue section) – here you input users that should have access to edit and display chosen column
- “Allow display” permissions column (red section) – here you input users that should have access to display chosen column
- “Set permissions for all columns” header (yellow section) – here you can input users that will be copied to all columns of the content type.



SCP - Settings for: Document - Shared Documents

Use this page to set permissions for each column of this content type.

| Set permissions for all columns | Allow edit and display | Allow display |
|---|---|-------------------------------|
| A SharePoint Column Name Name Title | B Allow edit and display Team Site Owners; Team Site Visitors; Team Site Members; INT-WSS-EN-TEST\adam; | C Allow display |

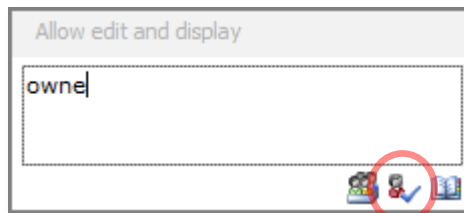
OK Cancel

To manage permissions for column, please input user/group into the textbox next to column name. If you want to allow user/group to edit and view the column, input them into the textbox in first column. If you want to allow user/group to view the column, input them into the textbox in second column. If you want to restrict access to the column simply make sure that the user/group is not in any of two textboxes.

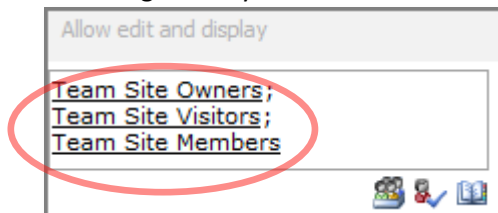
2.3.2 Using administration page

Inputting users to textboxes is simple and identical as in standard SharePoint permission management. You can either type user name or login into the textbox or choose a user from the directory.

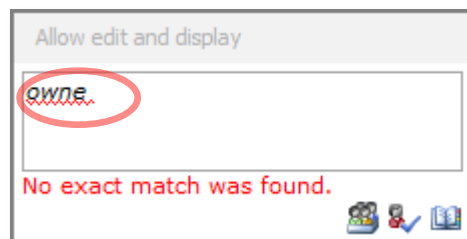
1. To type user name and login:
 - a. Type full user name or login or type part of the name or login. Separate each user by semicolon “;”
 - b. Click name check button below the textbox.



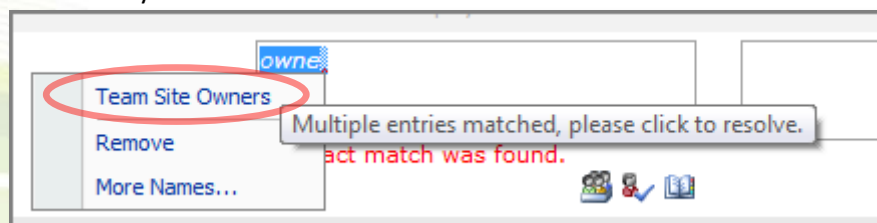
- c. If name is correct and recognized by SharePoint it will change to an underlined text.



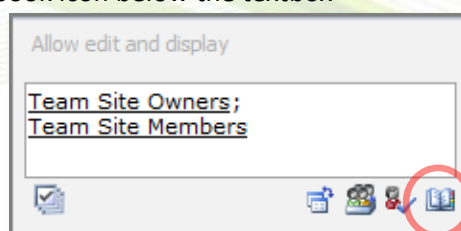
- d. If user is not recognized by SharePoint it will be underlined with red line and text will change to italic.



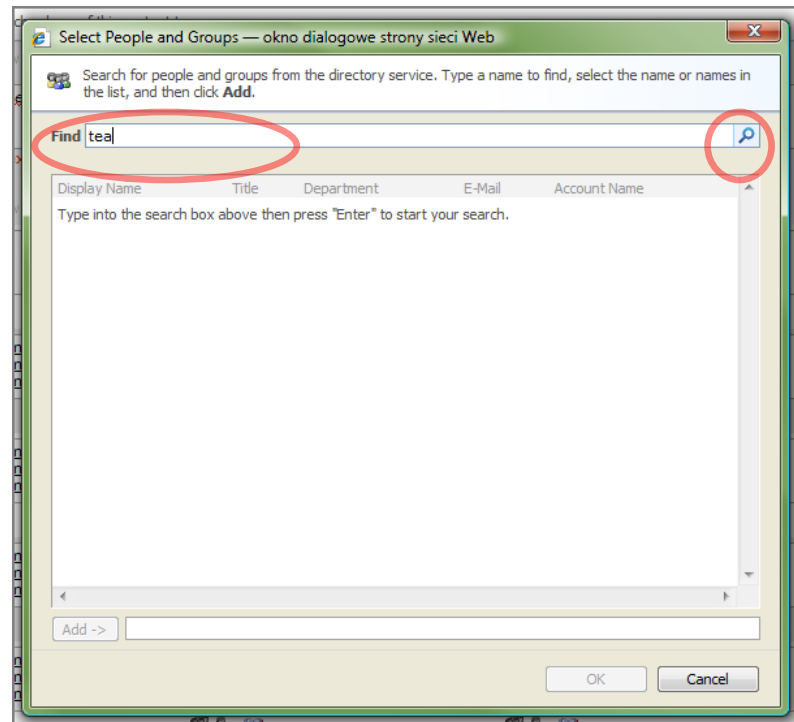
- e. Click on the not recognized user. A popup menu will appear with suggested best matches. You can choose from one of the matches, remove the entry or look it up in the directory.



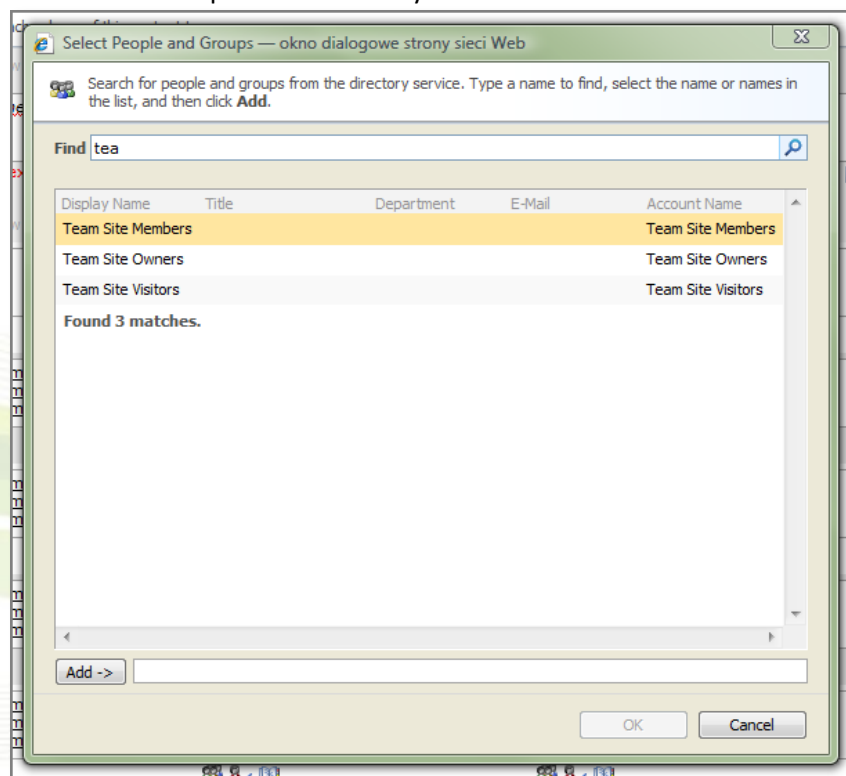
2. To choose a user from directory:
 - a. Click the address book icon below the textbox



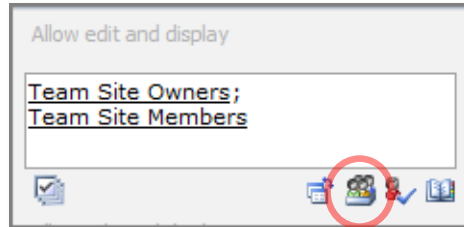
- b. A popup window will appear. Type part of the name or login of the user you want to add and click “Search” icon.



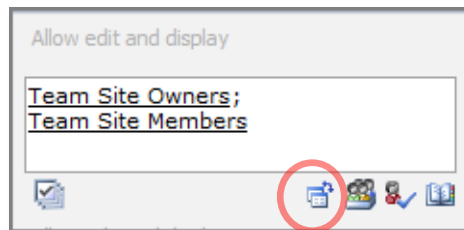
- c. In the results window choose the user you want to add by double clicking it or by clicking and pressing “Add” button. You can select multiple users and repeat search and selection multiple times. When you are finished click “OK” button.



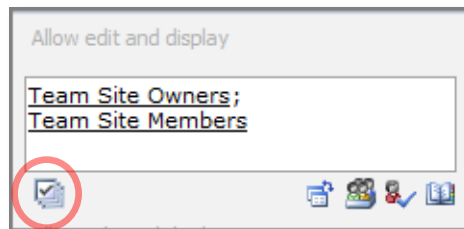
3. You can assign permissions to all authenticated users. It is a very comfortable way to manage permissions if you want to allow everyone to view or view and edit a column, without worrying about synchronizing permissions with SharePoint list or site. To assign permissions to all authenticated users click “Add all authenticated users” icon.



4. You can copy list users to the “Set permissions for all columns” header by clicking “Copy users from list” button. Users and groups that have permissions to this list will be copied to the text box. You can then copy permissions to all columns or manually copy users to chosen columns.



5. If you want to setup the same permissions to all columns please use the “Set permissions for all columns” header. Simply input users into the textbox in the header and click “Copy permissions to all columns” icon. Permissions from the textbox will replace entries in textboxes for all columns.



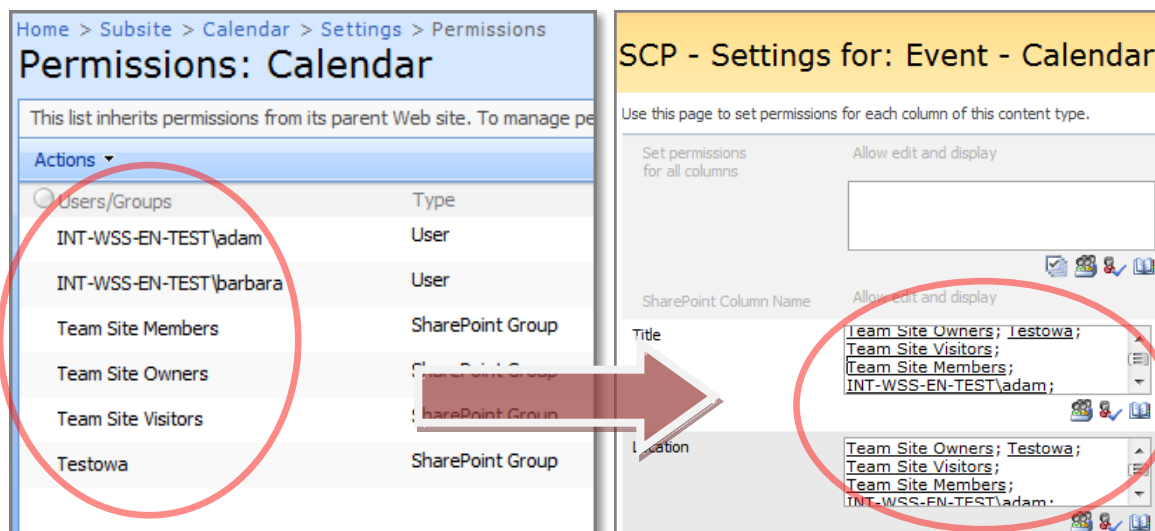
Note: All entries in the column textboxes will be deleted and replaced with values from the header textbox.

Note: Entries in header textboxes do not override entries in the column textboxes. Header textboxes are used only to copy permissions into the textboxes in columns and do not affect directly permission settings.

6. When you are finished please click “OK” button
Note: When you click “OK” button user name check for all textboxes will be performed. Your changes will not be saved until all textboxes contain correct user names.

2.3.3 List permission inheritance

When SCP is enabled for content type for the first time or when SCP is enabled after SCP reset for this list, users and user groups from SharePoint list are copied to “Allow edit and display” permission for each column. This way, by default all users with permission to the list have normal access to all columns.



If new users are added to list or site, you can copy them to the columns by clicking “Copy users from list” button.

Note: Users will be copied to header column. You can then copy them to all columns using “Copy permissions to all columns” button (Point 4 in chapter List permission inheritance).

Note: If you want to make sure that all users that have permission to the list can access given column, give permission to all authenticated users (Point 3 in chapter List permission inheritance).

2.4 Best practices

Below you will find few sample scenarios that will help you configure the SharePoint Column Protector the optimal way:

1. You want all users to be able to display all columns except one or two columns, which should be read only. These columns can be edited only by few users or groups.
 - a. Input authenticated users in the “Allow edit and display” textbox in the “Set permissions for all columns” header and click “Copy permissions to all columns” icon.
 - b. In the columns that should be read only, cut the users and paste them in to the right column “Allow display”.
 - c. Input in the “Allow edit and display” textboxes users and groups that should be able to edit the restricted columns.
2. You want to restrict access to one or few columns to chosen users.
 - a. Input authenticated users in the “Allow edit and display” textbox in the “Set permissions for all columns” header and click “Copy permissions to all columns” icon.
 - b. In the columns that should be restricted remove entries and input chosen users to “Allow edit and display” or “Allow display” permissions
3. You want to have strict control on who is viewing which column – refrain from using “Authenticated users” group.
4. You want to restrict access to all columns for a group of users – remove permissions for these users from SharePoint list or site.

3 Troubleshooting

For troubleshooting help and tips please contact our support team by mailing us support@datapolis.com.