

Column View Permission App

User Guide

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1. Introduction

The Column View Permission app allows you to control whether columns are hidden or readonly and manage the visibility of views.

With this app, you can:

- Set specific columns as hidden or read-only, preventing users from accessing or modifying them in **New**, **Edit**, or **Display** item forms, as well as in list views.
- Define conditions to control when columns should be hidden or read-only, ensuring dynamic and flexible permission settings.
- Hide views in the list or disable the **Create New View** option, preventing designated users from creating new views.
- Enable or disable actions in the list or individual views, controlling user access to them.

This user guide provides step-by-step instructions on how to configure and use the app to meet your requirements.

For the latest version of this and other guides, please visit:

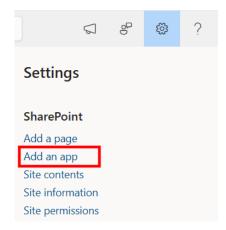
https://www.boostsolutions.com/download-documentation.html

2. Install, Upgrade and Remove App

2.1 Install the App from AppSource

Before beginning, make sure the account that is performing this procedure is a member of the site Owners group, or has the same permission.

1. Open SharePoint, click on the gear icon, then click **Add an app**.



- 2. At the top of the page in the menu bar, select **SharePoint Store**.
- 3. Search for 'Column View Permission'.



4. Click on the app, and then click the **Add to Apps site** button.



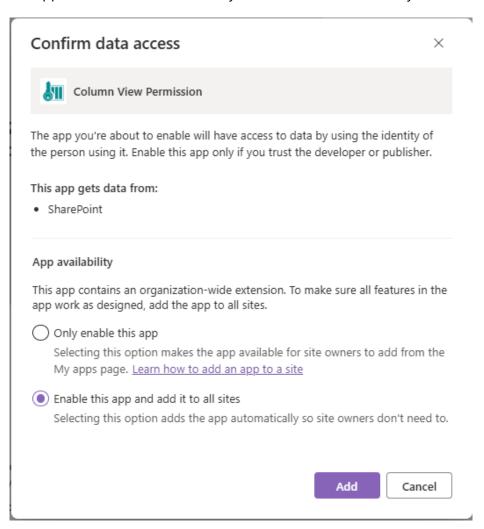
Column View Permission

Provided by: BoostSolutions

4.7 (4 Ratings)

Add to Apps site

5. Review app permissions and data access. You can choose to either **Only enable this app** or **Enable this app and add it to all sites** (recommended). If the latter option is not selected, the app will need to be individually added to each site where you want to use it.



- 6. Click Add button.
- 7. Now the app has been successfully added to your SharePoint. You can access it in your SharePoint list. If you cannot locate it, navigate to the site contents, and add Column View Permission to this site.

2.2 Add the App in the Site

If you select **Only enable this app** option while adding the app, follow these steps to add the app to individual site.

- 1. From your Site Contents page, click on **Add an app**.
- 2. Column View Permission is shown under Apps you can add. Click the Column View Permission title.
- 3. The app is now listed on the Site Contents page.
- 4. Navigate to a list, the Column View Permission action is visible on the command bar on the list.

Note: The action is only available for SharePoint Online modern experience.

2.3 Upgrade the App from AppSource

- 1. Navigate to the **App Catalog** site within your SharePoint Online tenant.
- 2. Find the Column View Permission in the App Catalog and click on it.
- 3. If an update is available, you will see an **Upgrade Store App** option in the command bar. Click this option to begin the upgrade process.
- 4. You'll be directed to a deployment page. You can choose to make the solution available to all sites in the organization. If this option is not selected, you'll need to manually update the app on each individual site.
- 5. Click the **Deploy** button to install the latest version of the app.
- 6. Go to the Site contents page (A site where app already deployed), find Column View Permission and click the ellipses (...) to view the app properties dialog.

- 7. In the callout that opens, click on **Details**.
- 8. Click **Get It** button to upgrade the app to the latest version.

Alternatively, you can delete the app from the App Catalog and then install the latest version from Microsoft AppSource.

Please note that the product settings will not be lost when you upgrade to the latest version or delete the current version.

2.4 Remove the App from a Site

- 1. Go to Site contents page, find Column View Permission app, and click the ellipses (...) to view the app properties dialog.
- 2. In the callout, click the ellipses (...) and then click Remove on the menu.
- 3. If you do not see an option to Remove, you may need to click Return to classic SharePoint at the bottom left of the screen.
- 4. Click **OK** on the confirmation message.

Now the Column View Permission app is removed from the site contents page.

To permanently remove the app, open the Recycle Bin, check the box next to the app in the list, and click Delete selection. If you want to completely remove this app, delete it in Second-Stage Recycle Bin.

2.5 Remove App from the App Catalog

- 1. Sign in to Office 365 as a global admin or SharePoint admin.
- 2. Select the app launcher icon in the upper-left and choose Admin to open the Microsoft 365 admin center.
- 3. In the left pane, choose Admin centers > SharePoint.
- 4. Select apps in the left pane, and then select **App Catalog**.
- 5. Click the **Apps for SharePoint** to display available SharePoint apps.

- 6. Click the Column View Permission app to display the context menu and choose **Delete**.
- 7. Click \mathbf{OK} on the confirmation message.
- 8. The Column View Permission app is removed from the App Catalog.

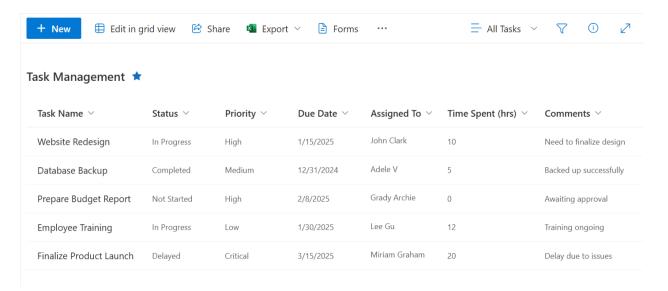
3. How to Use Column View Permission App

3.1 Set up a Column Permission Part

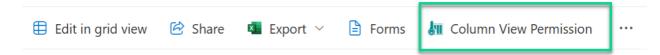
To configure a Column Permission Part, you must have **Full Control** permission on the list or be a member of the SharePoint Online group with Full Control permissions.

For normal users to access column permissions, they do not need specific permissions for the list or site. However, they must have appropriate permissions to access the **Site Assets** library, as the configuration settings for the Column View Permission app are stored in this library. Without access to Site Assets, the permissions may not work correctly.

In this guide, we use a custom list named **Task Management** as an example.



a. Open the **Task Management** list, click on **Column View Permission** in the top action bar. (Column View Permission app is only available in SharePoint modern experience.)



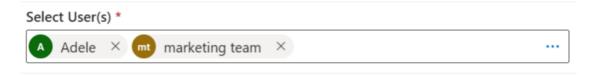
b. In the Column View Permission dialog box, click on Add a Permission Part.



c. In the Add a Permission Part dialog, specify a name for this part.



- d. In the **Select User(s)** section, specify the users or SharePoint group names.
 - If you specify a group, all members will be affected by the column permission settings.
 - Currently, only SharePoint groups are supported.



Optionally, click the three-dot icon to open another dialog for specifying users.



- **Include All Users**: Set this option to **Yes**, the column permission settings will be applied to all users in the site, including the site owner or administrator.
- **Exclude Users**: Add specific users or groups to exclude them from these settings.

Example: If you set **Include All Users** to **Yes** and exclude **Danies Liu**, then all users in the site collection will be affected by the column permission settings except **Danies Liu**.

Exclude Users



In this section, we select "Include All Users" to Yes.



- e. In the **Condition** section, you can set conditions to decide when the columns should be hidden or read-only, we will demonstrate how to set a condition in the next chapter.
- f. In the **Set Column Permissions** section, configure permissions for each item form. There are three forms: **New Item Form**, **Edit Item Form**, and **View Item Form**.
 - **New Item Form**: This form is used to create a new item. Here, you can only set columns as **hidden**. Once columns are set as hidden, they will not be displayed in the form when you create an item.
 - **Edit Item Form**: This form is used to edit or modify an existing item. Here, you can set columns as **read-only** or **hidden**:
 - o If columns are set as **read-only**, you can view them but cannot edit them.
 - o If columns are set as **hidden**, they will not be shown in the form when you edit the item.
 - **View Item Form**: This form is used to view an item or the list view. Here, you can only set columns as **hidden**. Once columns are set as hidden, they will not be visible in the list view or when you view an item. However, please note that the column title cannot be hidden in the list view.

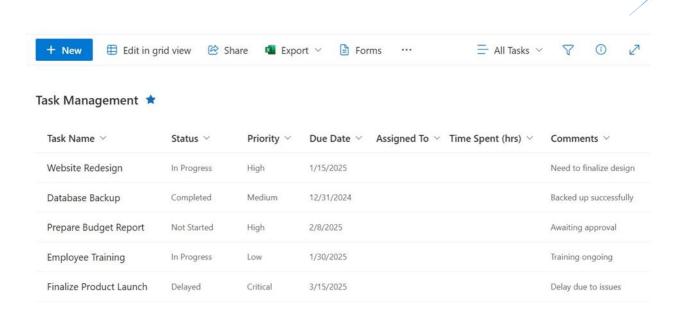
Here, we set the columns permissions as follows:

- Edit Item Form:
 - Set Status and Due Date as Read-Only.
 - Set Time Spent and Assigned To as Hidden.
- View Item Form:
 - Set Time Spent and Assigned To as Hidden.

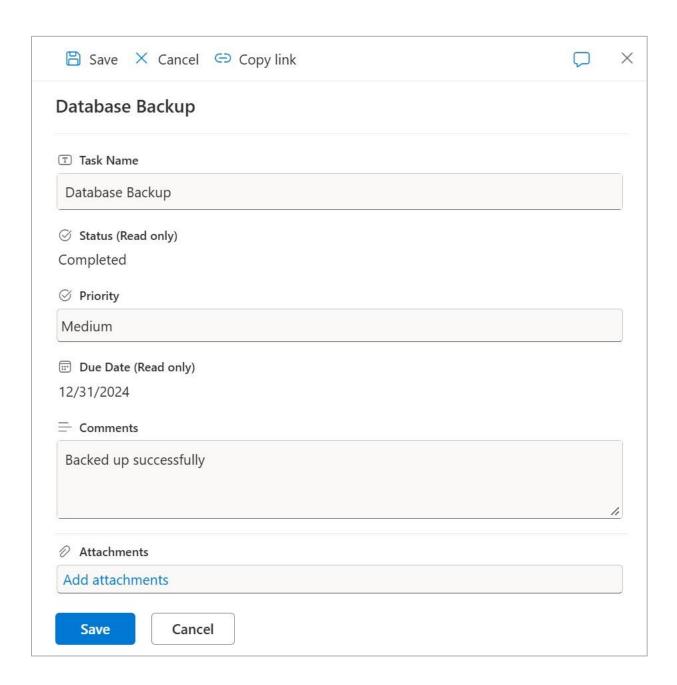
et Column Permissio		ges gent me		
Column Name	New Item Form	Edit Ite	View Item Form	
Total I tallie	Hidden	Hidden	Read-Only	Hidden
Task Name				
Status				
Priority				
Due Date				
Assigned To				~
Time Spent (hrs)				✓
Comments				

Please note that:

- Calculated columns cannot be set as **Hidden** in the **New Item Form**.
- Choice columns without the "Can add values manually" option enabled cannot be set as **Read-Only** in the **Edit Item Form**.
- Hidden **Choice** columns lose their format and must be reconfigured if modified.
- The **Title** column cannot be set as **Hidden** in the **View Item Form**.
- g. Click the **Save** to apply the settings.
- h. $Click \times to quit the settings page.$
- i. Log in as a user (e.g., **Adele**) and access the list, the content of the **Time Spent** and **Assigned To** columns will be invisible for him as follows.



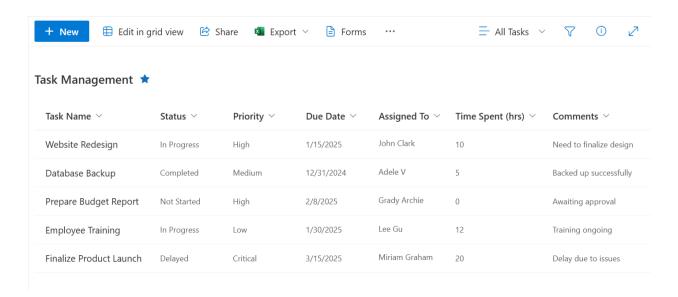
j. Select an item (e.g., **Database Backup**) and click **Edit.** Adele cannot see or edit the **Hidden** columns (**Time Spent**, **Assigned To**) or modify the **Read-Only** columns (**Status**, **Due Date**).



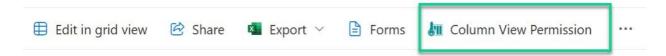
3.2 Set Columns Hidden or Read-Only Based on Condition

The Column View Permission app enables you to set up conditions to determine when the columns will be invisible or read-only.

In this list, we will demonstrate how to set up the conditions.



a. Click on **Column View Permission** in the top action bar.

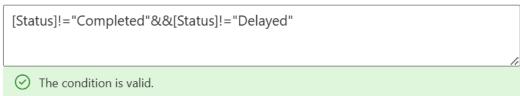


- b. In the Column View Permission dialog box, click on Add a Permission Part.
- c. In the Add a Permission Part dialog, specify a name for this part.
- d. In the **Select a User** section, specify the users or groups. Here, we specify another user, Danies Liu, as follows.



e. In the **Condition** section, set conditions as follows: [Status]!="Completed"&&[Status]!="Delayed".

Condition



 The condition is an expression that returns a Boolean value, either true or false. This Boolean value determines whether the function will take effect.

- This means that the predefined column permission is only enabled when the condition evaluates to **true**. Otherwise, the product will not function.
- Note: If an error occurs in the condition, the returned value will be **false**.
- The condition expression is composed of three parts:
 - o Column name (enclosed in [])
 - Operator (supported by the app)
 - Value (enclosed in ")
- Only when the message displays "**The condition is valid**" can the permission part be saved successfully, and the permission settings work for the specified users.
- f. In the **Set Column Permissions** section, select the columns and set them as hidden or read-only for each item form.
 - Edit Item Form:
 - o Set **Due Date** and **Assigned To** as **Hidden**.
 - Set Time Spent and Comments as Read-Only.
 - View Item Form:
 - Set Due Date and Assigned To as Hidden

Column Name	New Item Form	Edit Ite	View Item Forn		
Column Name	Hidden	Hidden Read-Only		Hidden	
Task Name					
Status					
Priority					
Due Date		~		~	
Assigned To		~		✓	
Time Spent (hrs)			~		
Comments			~		

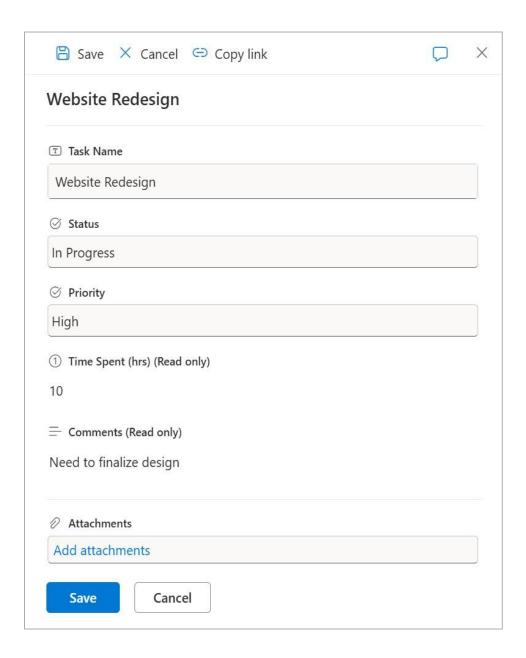
- g. Click the **Save** button to save the settings.
- h. Click \times to quit the settings page.
- i. Log in as the specified user **Danies Liu** and access the list.
 - The content of the **Assigned To** and **Due Date** columns is invisible when the **Status** is not completed or delayed.
 - But for items where the **Status** is completed or delayed, the content of the **Assigned To** and **Due Date** columns is visible for the user.

Task Management 🖈

Task Name ∨	Status 🗸	Priority \vee	Due Date $^{\vee}$	Assigned To $^{\vee}$	Time Spent (hrs) $^{\vee}$	Comments ∨
Website Redesign	In Progress	High			10	Need to finalize design
Database Backup	Completed	Medium	12/31/2024	Adele V	5	Backed up successfully
Prepare Budget Report	Not Started	High			0	Awaiting approval
Employee Training	In Progress	Low			12	Training ongoing
Finalize Product Launch	Delayed	Critical	3/15/2025	Miriam Graham	20	Delay due to issues

j. Select an item, such as **Website Redesign**, and click **Edit**.

Danies Liu cannot see the hidden columns (**Assigned To** and **Due Date**) or edit the readonly columns (**Time Spent** and **Comments**) as shown below.



3.3 Set up a View Permission Part

To set up a **View Permission Part** in a list, the steps are like configuring column permissions, with some key differences.

To configure a View Permission Part, you must have **Full Control** permission on the list or be a member of the SharePoint Online group with Full Control permissions.

For normal users to access view permissions, they do not need specific permissions for the list or site. However, they must have appropriate permissions to access the **Site Assets** library, as the

configuration settings for the Column View Permission app are stored in this library. Without access to Site Assets, the permissions may not work correctly.

In this example, we will configure the list so that only the "Active Tasks" view remains visible.

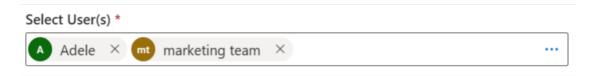
a. In the list, click on **Column View Permission** in the top action bar.



b. In the Column View Permission dialog box, click on Add a Permission Part.



- c. In the **Add a Permission Part** dialog, specify a name for this part.
- d. In the **Select User(s)** section, specify the users or groups.
 - Specify individual users or SharePoint group names. If you specify a group, all members will be affected by the settings.
 - Note: Currently, only SharePoint groups are supported.

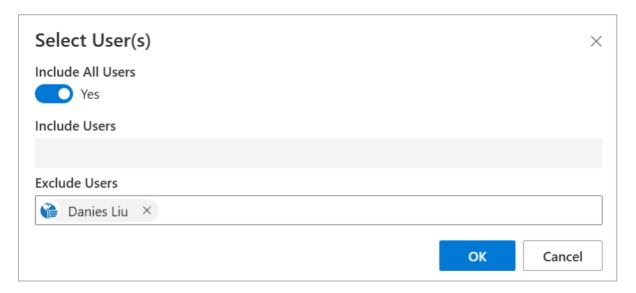


Optionally, click the three-dot icon to open an additional dialog for specifying users.

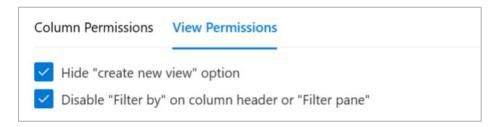


- **Include All Users**: Set this to **Yes** to apply the view permission settings to all users in the site collection, including the site owner or site collection administrator.
- **Exclude Users**: Specify individual users or groups to exclude them from these settings. When a user or group is excluded, the user or all members of the group will not be subject to the view permissions.

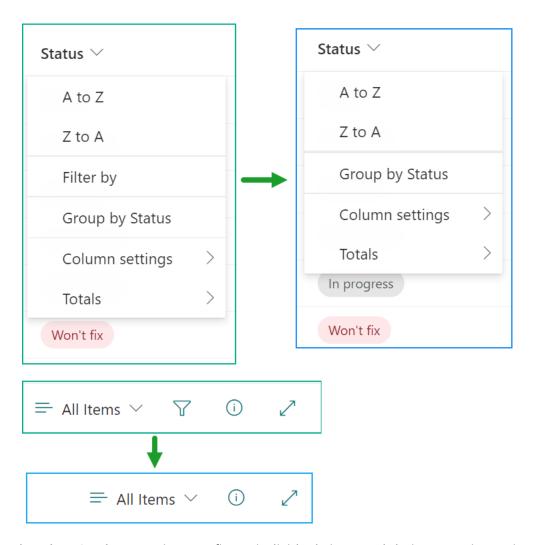
Here, we set Include All Users to yes. Add Danies Liu to the Exclude Users section.



e. Click on **View Permissions**, then configure the following settings:



- **Hide "Create new view" option**: Prevent specific users from accessing the "Create new view" or "Add view" options.
- Disable "Filter by" on column header or "Filter pane": Disable the "Filter by" and "Filter pane" features for the list.

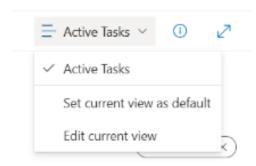


- f. In the **View Settings** section, configure individual views and their respective actions:
 - Select the "Hide View" option for any view to make it invisible in the list.
 - To disable specific actions within a view, click on the action name and turn it to grey.

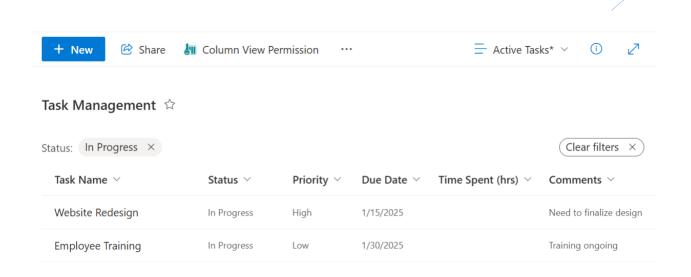
Here, we set three views hidden. And disable all listed actions for the "Active Tasks" view.



- g. And then, click OK to save the settings.
- h. Login as a user such as Adele.
 - Only the "Active Tasks" view is visible. Other views are hidden.

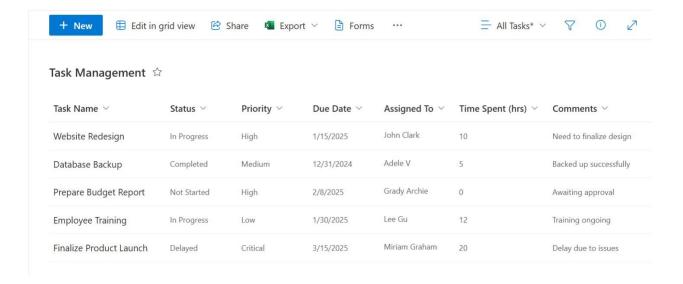


 Actions like "Edit in grid view", "Export" or "Add or remove fields" are not available in this view.



i. Login as the excluded user, Danies Liu.

All views are visible. And all the list actions remain available for him.



3.4 Conditions

The Column View Permission app enables you to set up the conditions to decide when the columns will be invisible or read-only.

The Column View Permission app provides the following functions:

Function	Description	Example
Date().getFullYear()	Returns the year of the specified date according to local time.	If the date of the [Start Date] column is 4/8/2022, [Start Date].getFullYear() will return 2022.
Date().getMonth()	Returns the month in the specified date according to local time, as a zero-based value (where zero indicates the first month of the year).	If the date of the [Start Date] column is 4/8/2022, [Start Date].getMonth() will return 3.
Date().getDate()	Returns the day of the month for the specified date according to local time.	If the date of the [Start Date] column is 4/8/2022, [Start Date].getDate() will return 8.
Date().getDay()	Returns the day of the week for the specified date according to local time, where 0 represents Sunday.	If the date of the [Start Date] column is 4/8/2022, [Start Date].getDay() will return 5.
Date().addDays()	Returns the date or datetime result from adding n days to the datetime value dateTime.	If the date of the [Start Date] column is 4/8/2022, [Start Date].addDay(4) will return 4/12/2022.
Date().addMonths()	Returns the date or datetime result from adding n months to the datetime value dateTime.	If the date of the [Start Date] column is 4/8/2022, [Start Date].addMonths(4) will return 8/8/2022.
Date().dateOnly()	Returns the day of the month for the specified date according to local time.	If the datetime of the [Start Date] column is 4/8/2022 10:30, [Start Date].dateOnly() will return 4/8/2022.
Abs()	Returns the absolute value of a number. That is, it returns x if x is positive or zero, and the negation of x if x is negative.	If the value of the [Number] column is -3, Abs([Number]) will return 3.
.length	Gets the count of characters in text.	If the content of the [Note] column is "SharePoint", [Note].length will return 10.
.contains()	Checks whether a string contains a sequence of characters. Returns true if the characters exist and false if not.	If the content of the [Note] column is "SharePoint", [Note].contains(s) will return true; [Note].contains(b) will return false.

	Returns the part of the string	If the content of the [Note] column
.substring()	between the start and end indexes,	is "SharePoint", [Note].substring
	or to the end of the string.	(1,3) will return ha.
	Cat display name of a specified	[Created by].title will return the
.title	Get display name of a specified	display name of the user who
	user.	created the item.
		[Created by].id will return the user
.id	Get user id of a specified user.	id of the user who created the
		item.
	Cot amail address of a specified	[Created by].email will return the
.email	Get email address of a specified	email address of the user who
	user.	created the item.

The Column View Permission App provides the following operators:

Operator	Description	
+	Plus	
-	Minus	
%	remainder	
*	Multiplied by	
/	Divided by	
==	Is equal to	
!=	Is not equal to	
!	Is not	
<	Is less than	
<=	Is less than or equal to	
>	Is greater than	

>=	Is greater than or equal to	
&&	AND	
	OR	

3.5 Technical Notes

Due to technical limitations on SharePoint Online, the Column View Permission app does not work in the following scenarios:

- SharePoint Online classic experience;
- Gallery view;
- Edit in grid view;
- Alert Me;
- Version history;
- Wiki page library and Discussion board list;
- Multiple Line of Text column;
- Search results;
- Mobile view.
- New List Experience

Appendix: Subscription Management

You can use the BoostSolutions Column View Permission trial subscription for a period of 30 days from the day you first use it, without any functional limitations.

When the trial subscription period ends, you will need to buy a subscription.

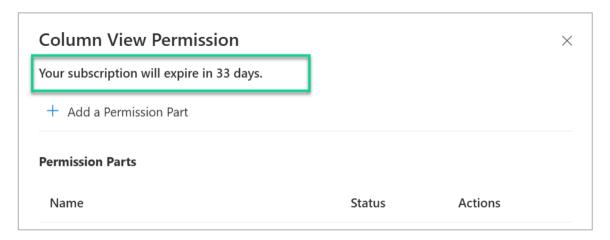
The subscription for the BoostSolutions Column View Permission is per site (previously called "site collection") or tenant, and it is billed annually.

For a site collection subscription, there are no end-user limitations. All users in the site collection can access the app.

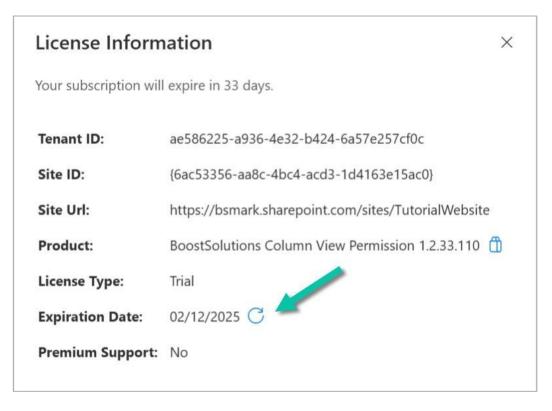
For a tenant subscription, there are no limitations on sites or site collections. All users can access the app in all sites or site collections within the same tenant.

Check Subscription Status

a. When you open the **Column View Permission** dialog, the subscription status will be shown at the top of the dialog. If the subscription is about to expire within 30 days, the notification message will display the remaining days.



b. To update the subscription status, click on the notification message, and the License Information dialog will appear.



Click the refresh icon next to the expiration date, and the new status will be loaded.

c. Once the subscription status changes to "Your subscription has expired on mm/dd/yyyy", it means that your subscription has expired.

X

License Information Your subscription has expired on 1/5/2025

Tenant ID: ae586225-a936-4e32-b424-6a57e257cf0c

Site ID: {6ac53356-aa8c-4bc4-acd3-1d4163e15ac0}

Site Url: https://bsmark.sharepoint.com/sites/TutorialWebsite

Product: BoostSolutions Column View Permission 1.2.33.110

License Type: Trial

Expiration Date: 01/05/2025 C

Premium Support: No

- d. Please send us (<u>sales@boostsolutions.com</u>) the Site URL/Site ID/Tenant ID to proceed with a subscription or renewal.
- e. If you purchase a site (site collection) subscription, the license status will be as follows.

The license type is Site.

License Information

X

Your subscription will expire in 33 days.

Tenant ID: ae586225-a936-4e32-b424-6a57e257cf0c

{6ac53356-aa8c-4bc4-acd3-1d4163e15ac0} Site ID:

Site Url: https://bsmark.sharepoint.com/sites/TutorialWebsite

Product: BoostSolutions Column View Permission 1.2.33.110

License Type: Site

Expiration Date: 02/12/2025 C

Premium Support: No

f. If you purchase a tenant subscription, the license status will be as follows.

The license type is Tenant.

License Information



Your subscription will expire in 33 days.

Tenant ID: ae586225-a936-4e32-b424-6a57e257cf0c

Site ID: {6ac53356-aa8c-4bc4-acd3-1d4163e15ac0}

Site Url: https://bsmark.sharepoint.com/sites/TutorialWebsite

BoostSolutions Column View Permission 1.2.33.110 Product:



License Type: Tenant

Expiration Date: 02/12/2025

Premium Support: No