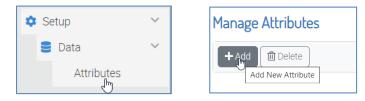


Restricting Employee Documents using Attribute Security

Setting security at the Attribute level

Securing Employee documents within an Application can be done by creating an employee-specific Attribute; access can be restricted using a drop-down selection of Y (Yes) or N (No).

 Create the Employee Y/N Attribute Under Setup -> Data -> Attributes, click Add



- Give the Attribute a Display Name.
- Select "String" as the Data Type.
- Select Standard Text as the String Type.
- Set the Data Length to the maximum number of characters to be used in the attribute (i.e., 3 for Yes, 1 for Y)

Add Attribute	×
Display Name * Employee Y/N	Data Type String
Computed String Type Standard Text	Data Length *
Linked	
	Cancel

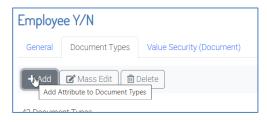
Click "Add" to complete.

- 2. Once the Attribute has been created, **select the Document Types on which this Employee Y/N** Attribute will be used.
 - Open the Attribute from the list by clicking on its Display Name

Ma	Manage Attributes									
I	Add Delete									
14	ttribute									
	Display Name [*]	ID	Column Name	Data Type	Data Length	Scale				
	Employee M/N	92	_EmployeeYN	String	1					



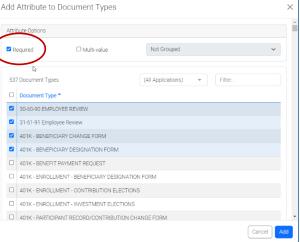
• Select the "Document Types" Tab and click "Add."



 Select the Document Types from the list of Documents. This list can be filtered by choosing a specific Application, or the Filter box can be used to search for a specific Document Type.

Once all Document Types have been selected, check the box to indicate if the Attribute will be Required for Indexing.

3. Add the Y value to the Attribute. Setup -> Documents -> Applications



=			Manage Applications						
DataDocuments	> >	•	-	Add	🛟 Merge 🕅 Delete 🛃	Export Secu			
🕈 Tracking	>		14	Applicat	ions				
🥒 Desktop eSign	>								
≁ Online eSign	>			ID	Singular Name 🕈	Plura			
👬 Workflow	>			16	Administrative	Admi			
Reporting	>			1	Compliance	Com			
🗠 Analytics				15	Consumer Loan	Cons			
🔅 Setup	~			2	Customer	Custo			
🛢 Data	>			3	Deposit	Depo			
📋 Documents	~			9	Example	Exam			
Applications				10	Facilities	Facil			

- Open the Application in which this newly-created Attribute will reside.
 (*Note:* you will have to follow this next step for <u>each</u> affected Application.)
 - Click the "Attributes" tab.

Consumer Loan								
General	Attributes	Document Types	Security					



- Any new Attributes are automatically added to the bottom of the Attribute list. To move the new Attribute up in sequence, click the "Sequence" button at the top, then click and drag the new Attribute from the bottom of the list to its desired location.
- Click Save. •

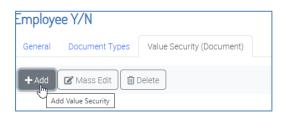


Consur	mer Loan				Close Date							
General Attributes Document Types Security								Tax ID Number Customer Number				
⇒ Sec	uence 📝 Mass Edit						.t	Member Number				
	y						1	SSN/TIN				
	Set the attribute order						2	Source	Set Attribute Order	×h		
22 Attribu	utes						1	Conversion Flag				
_								Conversion Source Indexing Required	Document Date			
Nam	ne	ID	Data Type	Dictionary	Sequence ⁺	Searchable	Wildc	Status	Description	Multivalue		
	ument Date	62	DateTime	None	1			Workflow Routing	Employee Y/N			
								Workflow Status				
Desc	cription	41	String (255)	None	2			 Minor Type 	Account Number			
	ount Number	1	String (50)	None	2		1	Current Balance	♦ Name			
					-			Employee Y/N Employee Y/N				
								\smile				
							-		Cancel Save			

5. Go back to the Attribute under Setup -> Data and click on the new Attribute to open it.

	Employee Y/N

6. Click the Value Security (Document) Tab and click "Add."



7. Type the Y in the Attribute Value field and then select any User/Group that will be granted access to these documents. Assign permissions to each.

Add Value Securi	Note: To ensure the documents have									
Y 1 User / Group								Filter		been locked down as expected, it is recommended that
User / Group	View	Print & Download	View Note	Add Note	Change Note	Index	Revise	Delete		Users with and
🛓 Sheila Nolder		2	<						Delete	without the permissions test
Add user/group Add user/group									A	access to the
▲ Miriam Maisel										documents.