

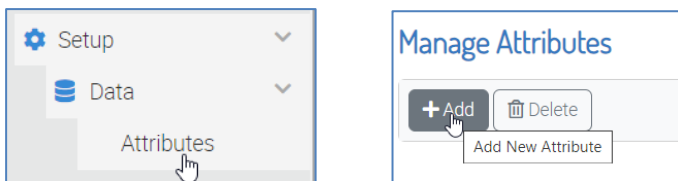
Restricting Employee Documents using Attribute Security

Setting security at the Attribute level

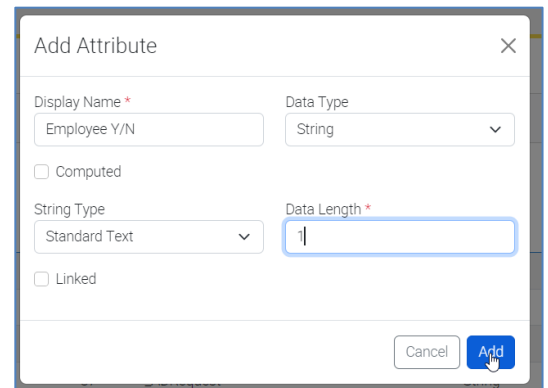
Securing Employee documents within an Application can be done by creating an employee-specific Attribute; access can be restricted using a drop-down selection of Y (Yes) or N (No).

1. Create the Employee Y/N Attribute

Under **Setup -> Data -> Attributes**, click **Add**



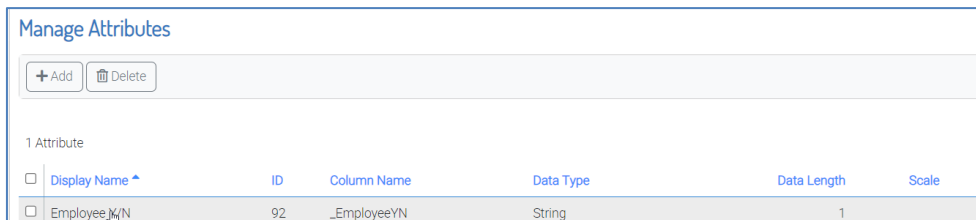
- Give the Attribute a Display Name.
- Select "String" as the Data Type.
- Select Standard Text as the String Type.
- Set the Data Length to the maximum number of characters to be used in the attribute (i.e., 3 for Yes, 1 for Y)



Click "Add" to complete.

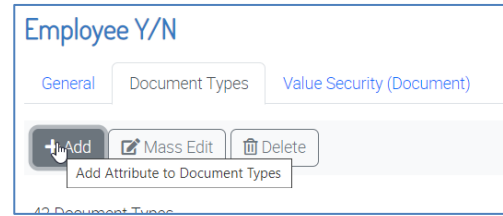
2. Once the Attribute has been created, **select the Document Types on which this Employee Y/N Attribute will be used.**

- Open the Attribute from the list by clicking on its Display Name

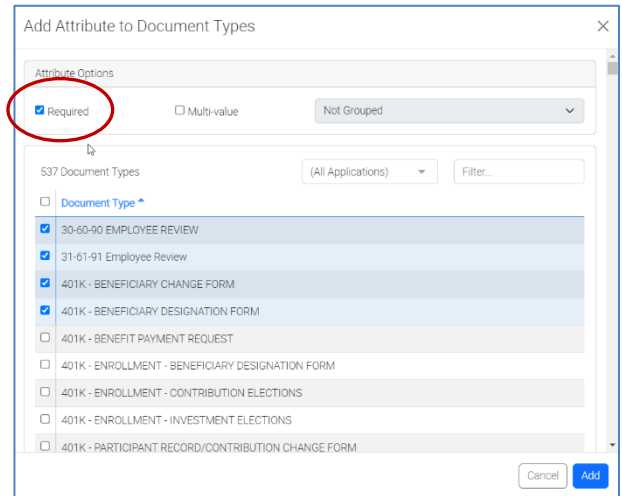


Display Name	ID	Column Name	Data Type	Data Length	Scale
Employee Y/N	92	..EmployeeYN	String	1	

- Select the “Document Types” Tab and click “Add.”

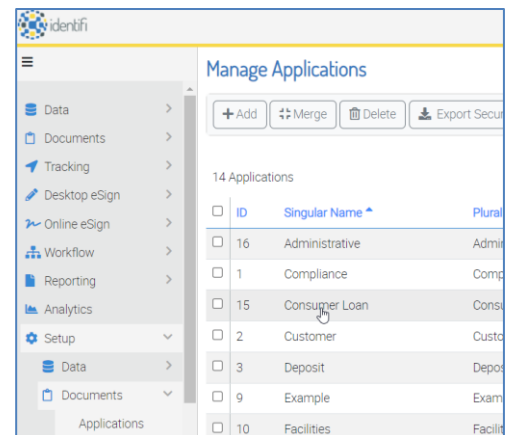


- Select the Document Types from the list of Documents. This list can be filtered by choosing a specific Application, or the Filter box can be used to search for a specific Document Type.



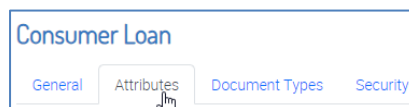
Once all Document Types have been selected, check the box to indicate if the Attribute will be Required for Indexing.

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



4. Open the Application in which this newly-created Attribute will reside.
(Note: you will have to follow this next step for each affected Application.)

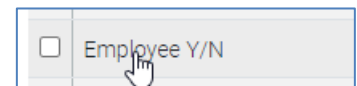
- Click the “Attributes” tab.



- 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**.



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



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.

Note: To ensure the documents have been locked down as expected, it is recommended that Users with and without the permissions test access to the documents.