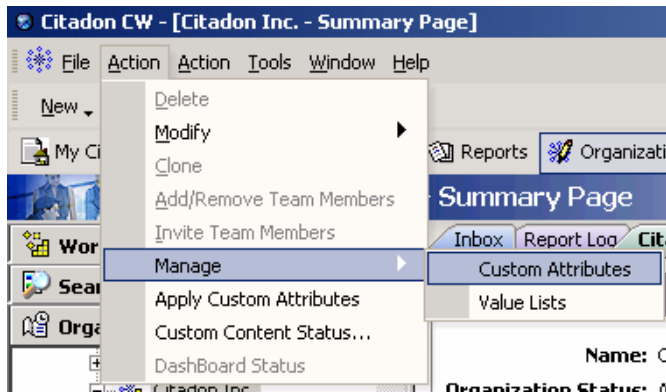


## Linking and Copying Custom Attributes

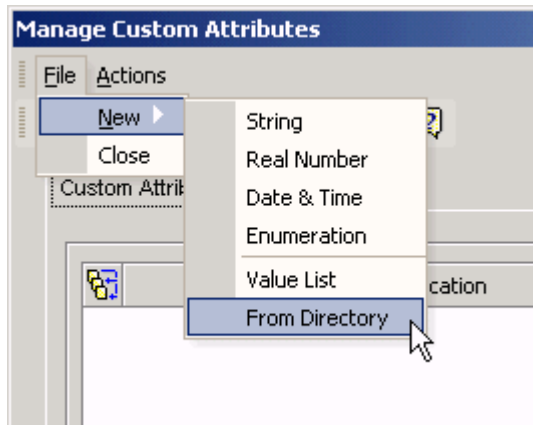
Only users with Administration privileges in an Organization or a Workspace can add or apply custom attributes.

Attributes created for a workspace are immediately available to that workspace. Attributes created at an organizational level can also be made available to any workspace owned by that organization. These attributes must be linked or copied to that workspace. To link or copy a custom attribute to a workspace:

1. Select the desired Organization or Workspace under the appropriate Administration tab

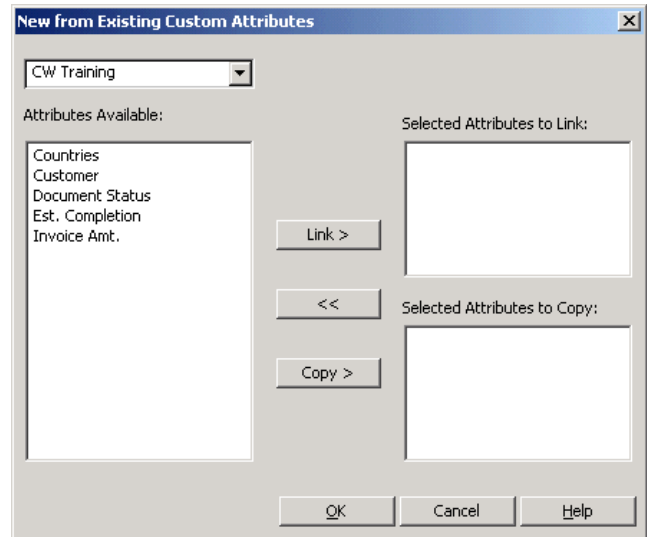


2. Select **Action->Manage->Custom Attributes** from the menu at the top. The Manage Custom Attributes screen is displayed.

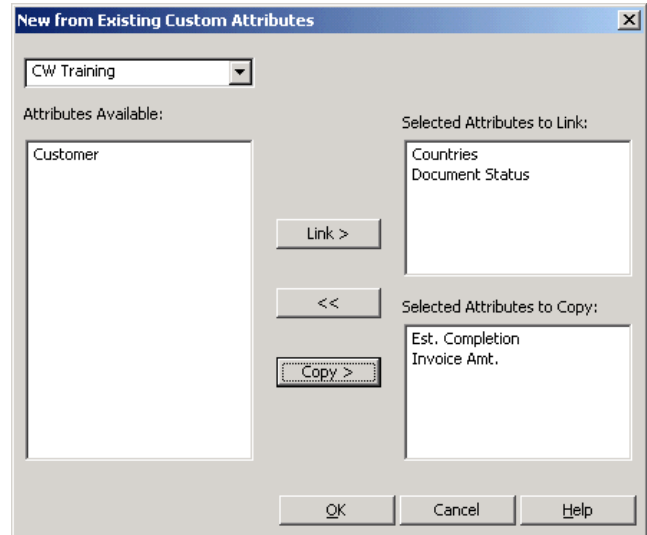


3. Select **File->New->From Directory** to access the organization's list of custom attributes.

**Note:** Custom attributes can be linked or copied only from the workspace's parent organization.

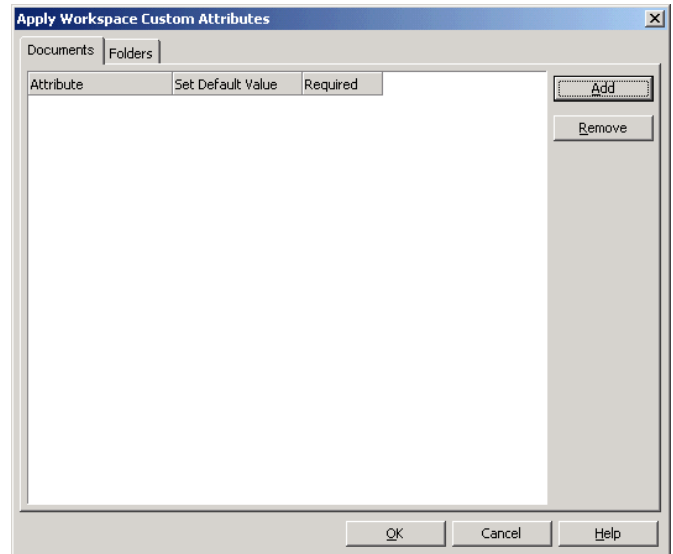
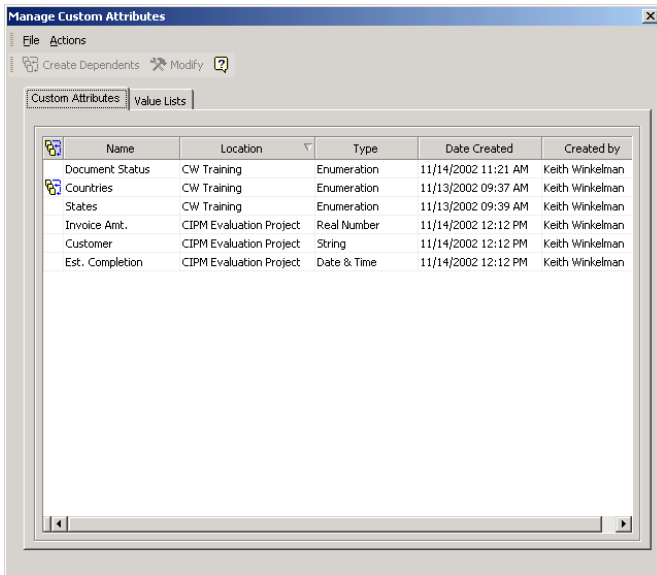


4. Select the parent organization using the pulldown



5. Select the desired custom attributes to be linked and click **Link >** to link them to the workspace.
6. Select the desired custom attributes to be copied and click **Copy >** to copy them to the workspace.
7. Use the **<<** button to remove items from the link or copy lists
8. Click **OK** when you are finished to link and copy the selected custom attributes to your workspace.

**Note:** Linking allows changes made to attributes at the organization level to be visible in every workspace that links to the attribute. Copying an attribute prevents changes at the organization level from affecting the attribute in the workspace.



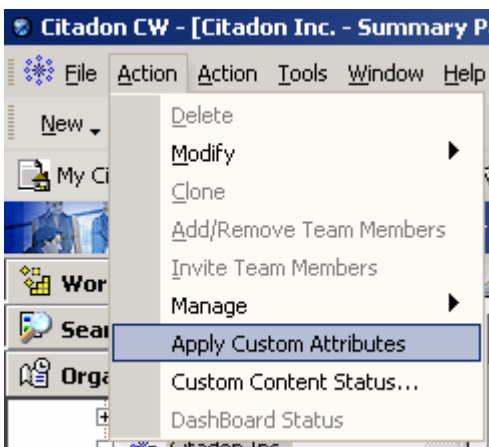
Attributes are now visible in the desired workspace and may be applied to documents or folders within the workspace.

Notice the **Location** column. Attributes linked to the workspace are still located at the organization. Copied attributes are now located in the workspace.


**Note:** Linked attributes cannot be modified in the workspace. They must be modified in the organization.

## Applying Custom Attributes

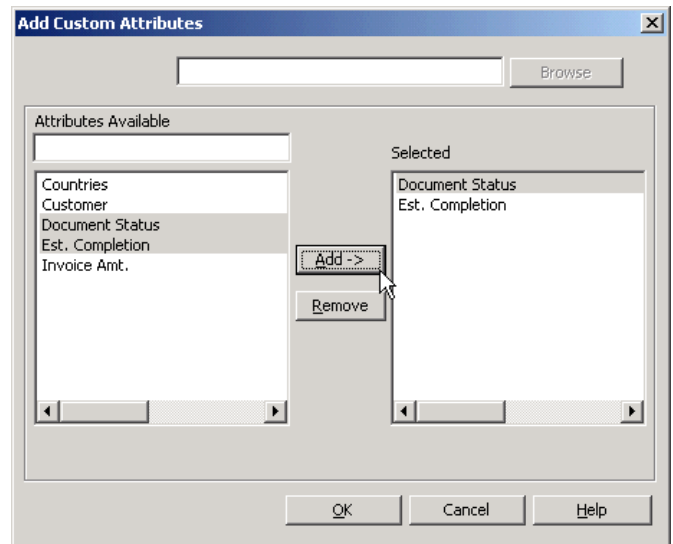
- From the Workspace Administration tab, select the desired workspace





- Select **Action->Apply Custom Attributes** from the menu

- Select the **Documents** tab and then click  to select the attributes to be applied to all documents.
 

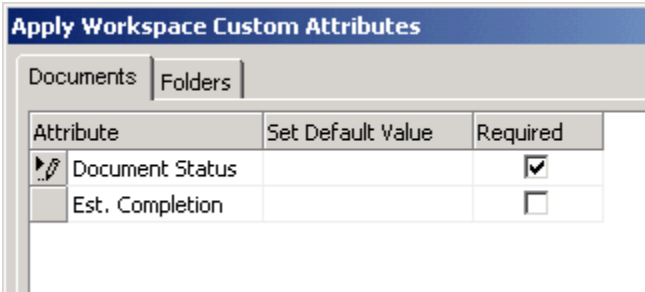
Select the **Folders** tab if you wish to select attributes to be applied to all folders. The steps are identical for both.



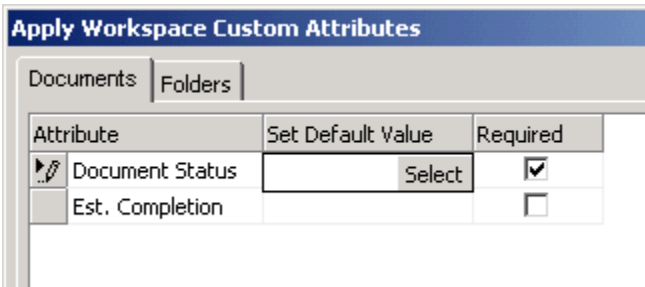
- Select the attributes to be made available to all documents and click  to add them to the list. When finished, click .

# Applying Custom Attributes

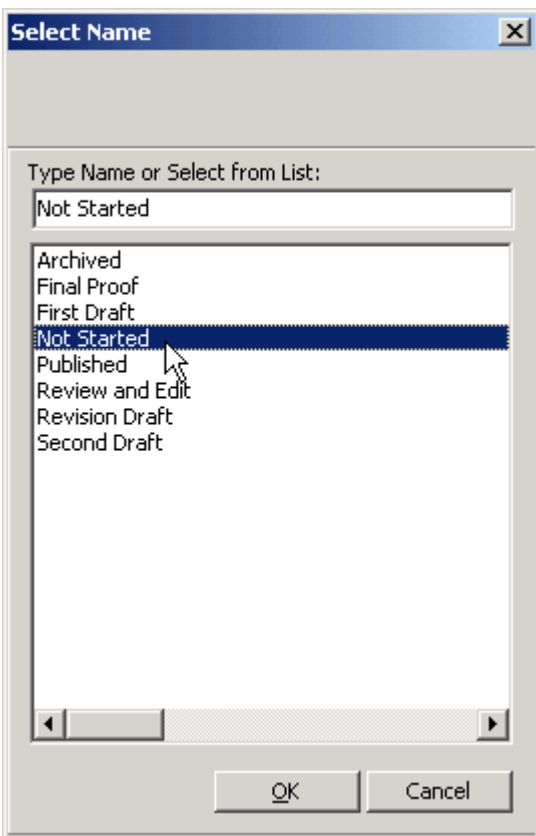
## Quick Reference Guide



5. Check the Required box for any attribute that will be required for a document. If an attribute is to be optional, leave it blank

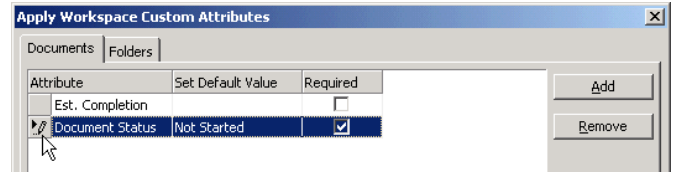


6. Click in the Set Default Value field for any attribute for which you intend there to be a default value presented. Then click **Select** to set the value



7. Select the desired default value from the list for that attribute and click **OK** to set it as the default.

If you wish to clear the default, simply swipe the value and hit the delete key



8. To remove an attribute from all documents (or folders) select the attribute by clicking on the control button for that attribute (Remove).

Then click **Remove** to remove the attribute from all documents (or folders).

9. When you are satisfied with the list of attributes for your documents and folders, click **OK** to apply the attributes and you're done.

## Citadon Customer Support

### Citadon CW

Hours: 6am - 6pm PST

<mailto:support@citadon.com>