

Instinct - How to Restrict Field to specific users

Use this how-to guide to allows specify fields to be restricted to specific users.

This guide allows you to specify what fields show data to users who have restricted access applied.

For example:

If a user has restricted access on an application type via Users or in the case of Activate Directory Security, Profiles then the user will only see the data displayed for the fields listed in the Application Field Type Display window, all other fields will display <<Restricted Access>>. If no fields selected restricted access users will be able to see Application Number and Application Type.

This features only applies to Instinct v5.1 and above

Setup User Access

Instinct Security

1. go to security > User
2. Select the specific User
3. Tick Restricted for the specific Application Type

Users

Organisation (filter)
HKB, HKK

Search:

User Id	User Name	Session Locked	Profile
ADMINISTRATOR		No	ADMINISTRAT
administrator1		No	ADMINISTRAT
FRAUD MANAGER BN		No	DEFAULT
FRAUD REVIEW BN		No	DEFAULT
Test 2		No	FRAUD MANA

User Id
Test 2

User Name

Password
.....

Re-enter Password
.....

Profile
FRAUD MANAGER

Session Lock
Not Locked ☐ Internal User

Status
Active

Last Sign-On Date

Date Last Maintained
05/12/2019 10:03:35 AM

Maintained By
ADMINISTRATOR

Organisation
HKB

Rule Admin Groups

Application Type	Restricted
<input checked="" type="checkbox"/> Blacklist record	<input type="checkbox"/>
<input checked="" type="checkbox"/> Credit Card	<input type="checkbox"/>
<input checked="" type="checkbox"/> CF LOANS-J-B	<input type="checkbox"/>
<input checked="" type="checkbox"/> CF LOANS-S-B	<input type="checkbox"/>
<input checked="" type="checkbox"/> Hire Purchase	<input type="checkbox"/>

Add

Change

Delete

Update History

Print

4. Click Change

Active Directory

- 1. go to Security > Profiles
- 2. select specific Profile
- 3. Under Application Type tick Restricted for the specific Application Type

Profiles

Profiles

Profile

ADMINISTRATOR

Set Default Options

Full

View

None

☐ Expire password after

days

☐ Enable Session Locking

Printing Options

☒ Printer

☒ Excel

☒ CSV

☒ PDF

Diary Attachment

☒ Delete Attachment

Score

☒ View Score

Diary Notes

☒ Update Diary Notes

☒ Delete Diary Notes

Dashboard Role

General

Manager

Reviewer

Menu Options

Add

Change

Delete

Update History

Print

Application

Definitions

Criminal

Information

Security

Options

Review Online Calls

Full

View

None

Action

Full

View

None

Confidential

Batch File Upload

Full

View

None

Full

View

None

Application Review Batch Loads

Full

View

None

Action

Full

View

None

Confidential

Applications Under Investigation

Full

View

None

Action

Full

View

None

Confidential

Organisation Monitoring

Full

View

None

Full

View

None

Online Maintenance

Full

View

None

Update, Delete

Full

View

None

Confidential

Application Quick Search

Full

View

None

Update, Delete, Action, Fraud Chec

Full

View

None

Confidential

Application Search Using Criteria

Full

View

None

Full

View

None

Application Case Management

Full

View

None

Delete

Full

View

None

Confidential

Application Database Clean-Up

Full

View

None

Full

View

None

Locks

Full

View

None

Full

View

None

Active Directory Permissions

Organisation

GBG

Rule Admin Groups

Application Type

Application Type

☒ Credit Card

☒ Hire Purchase

☒ Personal Loan

☒ Mortgage

☒ Overdraft

Restricted

☐

☐

☐

☐

☐

4. Click Change

Setup Restricted Fields

1. go to Options > Field Application Type field Display

Application Type Field Display

Available Fields

Select All Deselect All

Field Name

Application.Application Date

Application.Amount/Limit

Application.Branch

Application.Decision

Application.Decision Reason

Application.Decision Date

Application.User Field 1

Application.Blacklist Narrative 1

Application.Blacklist Narrative 2

Application.User Field 4

Application.Informer First Name

Application.Informer Last Name

Application.Informer Address 1

Selected Fields

Select All Deselect All

Field Name

No data available in table

→

←

Save Print

2. Highlight the non restricted field from the available field and move it to across to the selected field (The field that remain in the left panel are the restricted fields).
3. Click Save

Example of Amount Limit as restricted Fields

1. User with Application type restricted

Application Type

Application Type	Restricted
<input checked="" type="checkbox"/> Credit Card	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Hire Purchase	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Personal Loan	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Mortgage	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Overdraft	<input checked="" type="checkbox"/>

2. Amount limit set as the restricted Fields

Application Type Field Display

Save

Print

Available Fields

Select All

Deselect All

Field Name

Application.Amount/Limit

Selected Fields

Select All

Deselect All

Field Name

Application.Application Date

Application.Branch

Application.Decision

Application.Decision Reason

Application.Decision Date

Application.User Field 1

Application.User Field 2

Application.User Field 3

Application.User Field 4

Application.User Field 5

Application.User Field 6

Application.User Field 7

Application.User Field 8

→

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3. User Reviewing the Application where Amount Limit is not displayed.

Application Quick Search - Application Record

Return to results

First

Previous

1 of 1

Next

Last

Application Number

20190092001

Application Date

06/08/2019

Organisation

GBG

Application Type

CARD

Application

Applicant

Previous

1

Next

Load Date

07/10/2019

Action Date

Expiry Date

Fraud Score

0

Scorecard Score

0

Branch

156

Action Taken

Amount/Limit

Batch Serial Number

Decision

ACTIVE

Decision Date

Decision Reason

Action User Id

Fraud Alert Team

Case Number

Triggered Rules

R01,R02

Fraud Alert User Id

Fraud Alert

Clean

Last Review Date

Risk Level Calculated

Clean

Risk Level Assigned

Next Review Date Calculated

CRC Date

CAC Date

Next Review Date Forced

CRC Decision

CAC Decision

Next Review Date Assigned

CRC Comment

CAC Comment

Update

Delete

Review

Link Analysis Review

Fraud Check

Action

Diary

Auto Fraud Check

Reassign

Toggle

Link

Image

Print

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