QUICK START GUIDE

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NOTE: The following features must be completed by an Administrator

1. MANAGING USERS

New
DisplayName
SystemRole
Save

1.1. Click the Admin gear and select USERS
1.2. Click New. Type a display name and email
1.3. Select a user role and click Save:
- Viewer: read-only access to documents of the given type
- Editor: viewer privileges + access to edit properties/attribute values for documents of the given type
- Validator: editor privileges + access to edit and validate extracted information for documents of the given type
- Administrator: validator privileges + access to manage users and application settings

Tips. To authorize a user, select the account and click Authorize
Next, assign a role and click Save
To disable an account, select the user and click Inactive
To reactivate, select the user and click Active

2. MANAGING API KEYS

New
DisplayName
SystemRole
Save

2.1. Click the Admin gear and select API KEYS
2.2. Click New
2.3. Type a display name, select a system role and click Save

Tips. Click Regenerate Api Key to generate a new key
To make an API key inactive, select it and click Inactive
To reactivate, select it and click Active

3. MANAGING ONTOLOGIES

Load
Module
Save

3.1. Click the Admin gear and select ONTOLOGY
3.2. Click Load
3.3. Click Browse and select a module. Click Save

Tips. To edit an ontology, select it and click Edit

4. MANAGING ATTRIBUTES

New
Name
Description
Save

4.1. Click the Admin gear and select ATTRIBUTES.
4.2. Click New.
4.3. Type a name and description.
4.4. Select a data type and unit of measure. Click Save.

Tips. To delete an attribute, select it and click Delete.
To edit, select the attribute and click Edit.

5. MANAGING DOCUMENT TYPES

New
Name
Select
Entities
Attributes
UserAccess
Save

5.1. Click the Admin gear and select DOCUMENT TYPES.
5.2. Click New.
5.3. Type a name and description.
5.4. Select an Ontology and click Save.
5.5. Select entities and indicate if confirmation is required. Click Save.
5.6. Select attributes and click Save.
5.7. Assign user access and click Save.

Tips. To delete a document type, select it and click Delete.
To edit, select the document type and click Edit.
To copy a document type, select it and click Copy. Type the name and description. Click Save.

6. MANAGING VALUE LISTS

New
Name
+ Add
Save

6.1. Click the Admin gear and select VALUE LIST.
6.2. Click New.
6.3. Type a name and description.
6.4. Click + Add and type allowed values. Click Save.

Tips. To delete a list, select it and click Delete.
To edit, select the list and click Edit.