1. MANAGING USERS
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
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
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
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
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
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.