Quick Start Guide

NOTE: The following features must be completed by an Administrator.

Managing Users

1. Click **Admin** and select **Users**.
2. Click **+ Add User**.
3. Type a display name and email.
4. Select a user role:
   - **Viewer**: view only access to documents
   - **Uploader:** can upload w/metadata, view documents, add tags
   - **Editor Lite:** can view/edit documents; cannot delete
   - **Editor**: can view/edit/delete documents
   - **Administrator**: Editor privileges; manages users and app settings
5. Click **Add**.

*Tips: To disable an account, locate the user and click **Archive**.*
*To reactivate, locate the user and click **Enable**.*

Managing API Keys

1. Click **Admin** and select **API Keys**.
2. Click **+ Add API Key**.
3. Type a display name, select a system role and click **+ Add API Key**.

Tips: Click the icon to regenerate an access token.
*To make an API key inactive, select it and click **Archive**.*
*To reactivate, click **Archived**, select the API key and click **Reactivate**.*

Managing Attributes

1. Click **Admin** and select **Attributes**.
2. Click **+ Add Attribute**.
3. Type a name and description.
4. Select a data type and click **+ Add Attribute**.

*Tips: To make an attribute inactive, select it and click **Archive**.*
*To reactivate, click **Archived**, select attribute and click **Reactivate**.*

Managing Document Profiles

1. Click **Admin** and select **Document Profiles**.
2. Click **+ Add Profile**.
3. Type a name and description. Click **+ Add Profile**.
4. To add attributes, select the new profile. Highlight the desired attribute(s) from the available list and click .

*Tips: To make a profile inactive, select it and click **Archive**.*
*To reactivate, click **Archived**, select the profile and click **Reactivate**.*

Managing Document Types

1. Click **Admin** and select **Document Types**.
2. Click **+ Add Document Type**.
3. Type a name and description. Click **+ Document Type**.

Tips: You can click and drag document types to reorder the list.
*Only user-defined document types (denoted by the icon) can be deleted. Select a document type(s) and click **Delete**.*

Managing Document Statuses

1. Click **Admin** and select **Document Statuses**.
2. Click **+ Add Document Status**.
3. Type a name and description.
4. Select a color (optional):
   - Click the icon to select a specific color.
   - Click the icon to generate a random color.
5. Check Default Status to set default for new documents (optional).
6. Click **Add**.

*Tips: Click **Edit** to modify an existing document status.*
*Click **Delete** to delete a document status. The Delete option is not available if the status is currently in use.*