

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

Managing Users

1. Click the Admin gear  and select **Users**.
2. Click **New**. Type a display name and email.
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**.*

Managing API Keys

1. Click the Admin gear  and select **API Keys**.
2. Click **New**.
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**.*

Viewing Ontologies

1. Click the Admin gear  and select **Ontology**.
2. Click on an Ontology to view details.

Tip: Go to Ontology to see a list of available ontologies.

Managing Attributes

1. Click the Admin gear  and select **Attributes**.
2. Click **New**.
3. Type a name and description.
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**.*

Managing Document Types

1. Click the Admin gear  and select **Document Types**.
2. Click **New**.
3. Type a name and description.
4. Select an Ontology and click **Save**.
5. Select entities and indicate if confirmation is required. Click **Save**.
6. Select attributes and click **Save**.
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**.*

Managing Value Lists

1. Click the Admin gear  and select **Value List**.
2. Click **New**.
3. Type a name and description.
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**.*