ThoughtTrace PROVISION INSIGHTS

Quick Start Guide

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.
5. Click **Add Field** and repeat steps 3-4 as needed. Click **Save**.

Tips: To archive an attribute, select it and click ***Archive****.*
To restore an archived attribute, select it and click ***Restore****.*
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 a Document Type 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****.*