VT Docs

QUICKSTART GUIDES

System Administration for On-Prem

VT Docs 5.0 gives users access to multiple workspaces, if they are given permission. If a user can access more than one workspace, they can choose the workspace to sign into and switch workspaces once signed in. We have redesigned the system administration portal (formerly called Sandbox Admin), allowing admins to easily assign users to workspaces.

Roles in VT Docs

The On-Prem application deployment process will create the first user with System Admin access. Please request your I.T. team to create an additional user with Active User & User Admin access.

1. System Admin

- Create Workspaces
- Create Users
- Manage Users
- Manage License
- Manage Security settings
- Change User Passwords
- Set System Settings
- Create Dictionaries
- Create Folders
- Upload documents
- Run VT Docs features

2. User Admin

- Create Users*
- Manage Users*
- Change User Passwords*
- Create Dictionaries*
- Create Folders*
- Upload documents*
- Run VT Docs features*

*   (workspace dependent) The user must be assigned to the individual workspace with appropriate rights

3. Active User

- Create Dictionaries*
- Create Folders*
- Upload documents*
- Run VT Docs features*

How to create a VT Docs Workspace

Log into VT Docs with your credentials. You must have System Admin privileges.

1. Click on the System Admin icon on the sidebar

2. The Workspaces tab opens, there is a default workspace already created.

3. Click the **Create Workspace** button on the right-hand side of the interface.

4. Insert your new Workspace Name and click Create. Click **OK** when the workspace has been successfully created

5. The Workspace interface displays your new Workspace

6. Repeat steps 3 & 4 for additional Workspaces.

QUICKSTART GUIDES
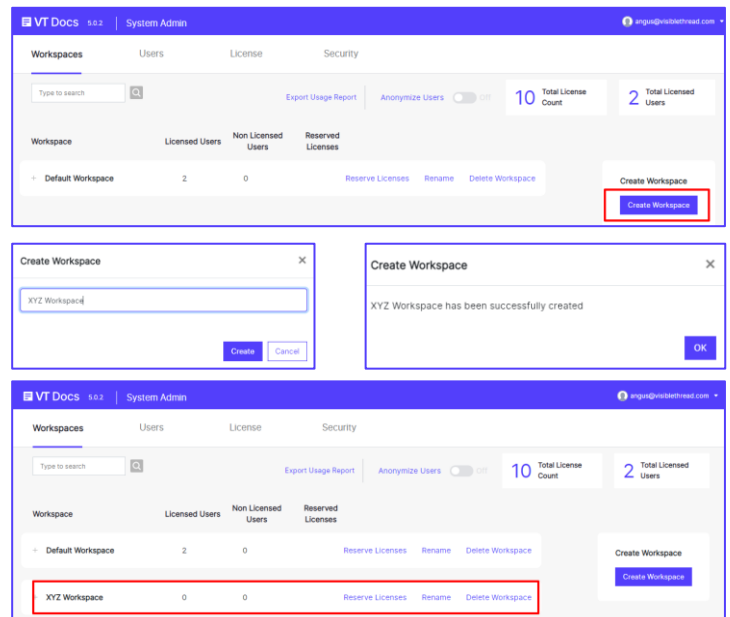
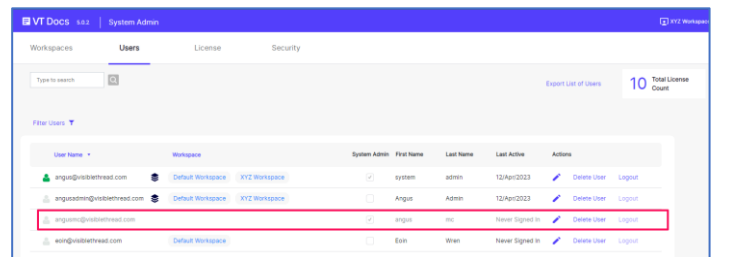# System Administration for On-Prem

How to create a user to VT Docs from System Admin

1. Click on the System Admin icon on the sidebar

2. Click on the **Users** tab in the interface

3. The list of users, if created, are shown for your VT Docs instance.

4. Click the Add New User button on the right-hand side of the interface. The Add User box displays on screen. Enter the:
   - email address as User Name
   - First Name
   - Last Name
   - Password
   - Confirm Password

5. Click the "Add User" button to complete the new user account.

6. Repeat step 4 & 5 for additional Users.

7. The new user will be listed on the System Admin interface under the **Users** tab.
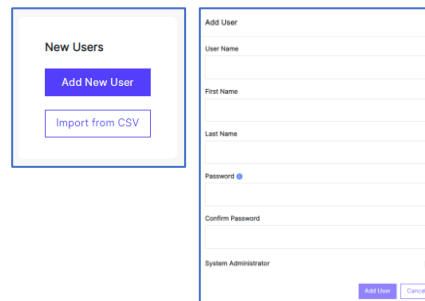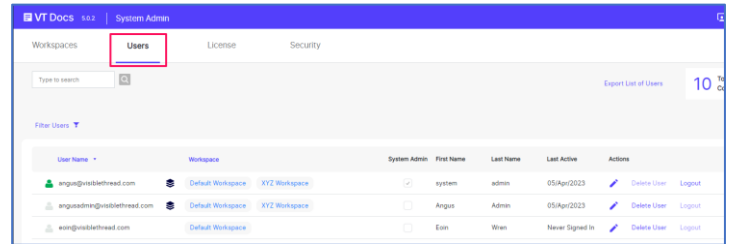
   *Note: This new user isn't assigned to a Workspace. The user must be assigned by the User Admin for the workspace.

How to reset a user Password from System Admin

1. Click on the System Admin icon on the sidebar

2. Click on the **Users** tab in the interface

3. To reset a user password, click on the pencil icon. ✏️

4. The Edit User box displays. Enter new Password and Confirm Password.

5. Click **Save**. This updates the user password for all workspaces the user is a member of.
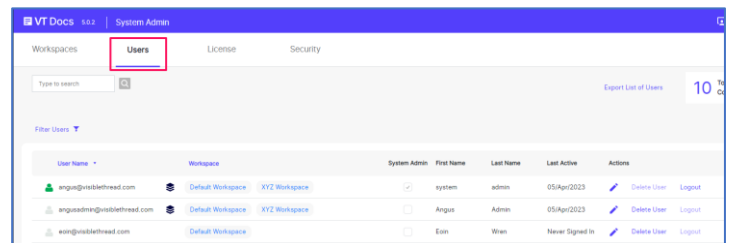
Log into VT Docs with your credentials. Select the Workspace you want to access. You must have User Admin privileges set for your account in that workspace. Your System Administrator can do this for you if needed.

How to assign a user to a VT Docs Workspace

1. Log into VT Docs with your credentials.

2. Click on the Admin icon on the sidebar

3. The **Users** tab opens, listing the existing users for that workspace.

4. Click the **Create User** button on the right hand side of the interface.

5. The Add User box displays on screen. Enter the:
   - email address as User Name
   - First Name
   - Last Name
   - Password
   - Confirm Password

6. Click the "Add User" button to complete the new user account.

7. The new user will be listed on the **Users** tab in the User Admin interface.
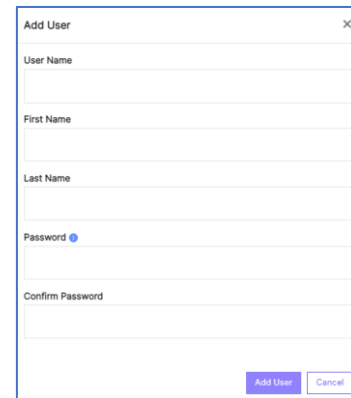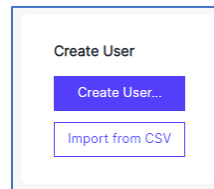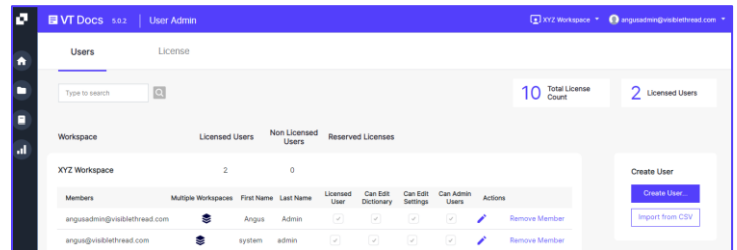
How to assign additional rights to a User in a Workspace

1. The new workspace member (user) will be listed on the **Users** interface.

2. Assign the new user access rights by clicking on the pencil icon.

3. Click the checkboxes to allow:
   - Dictionary editing (for this workspace)
   - Settings (for this workspace)
   - Administer users (for this workspace)

4. Click the **Save** button.
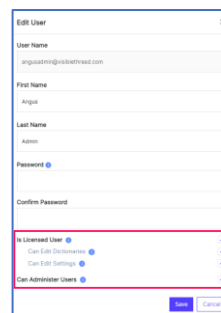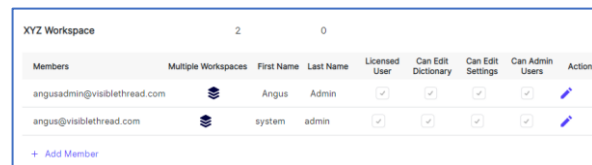
How to reset a user Password from User Admin

1. Click on the User Admin icon on the sidebar

2. Click on the **Users** tab in the interface

3. To reset a user password, click on the pencil icon.

4. The Edit User box displays. Enter new Password and Confirm Password.

5. Click **Save**. This updates the user password for all workspaces the user is a member of.
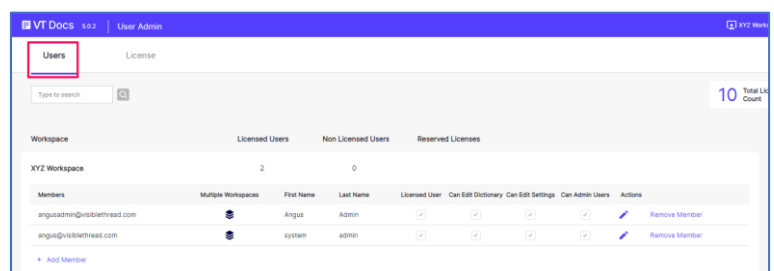
Log into VT Docs with your credentials. Select the Workspace you want to access. You must have Admin privileges set for your account in that workspace. Your System Administrator can do this for you if needed.

How to edit settings

VT Docs settings are configurable from the Settings menu.

- Configure your Readability threshold settings and Ignore list.

- Update your Acronym Ignore List

- Create Macros for customized outputs. Our Customer Success team can help you upload a macro if needed.
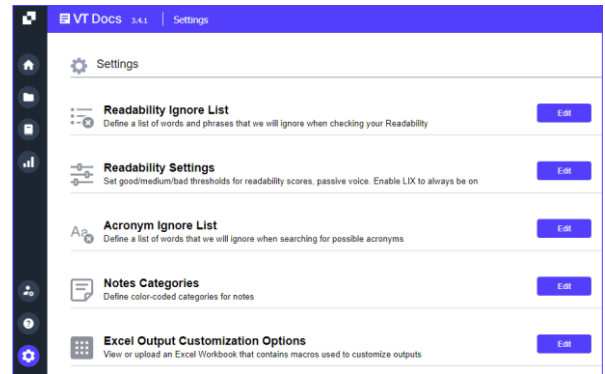
Readability Ignore List

1. Click on the Settings menu icon.

2. Click the **"Edit"** button opposite **"Readability Ignore List".**

3. Click the **"Add"** button.

4. Add your term to the new row.

5. Click **"Save Changes"**.

6. To remove a term, select the row and click "Remove"

7. Click **"Save Changes"**.
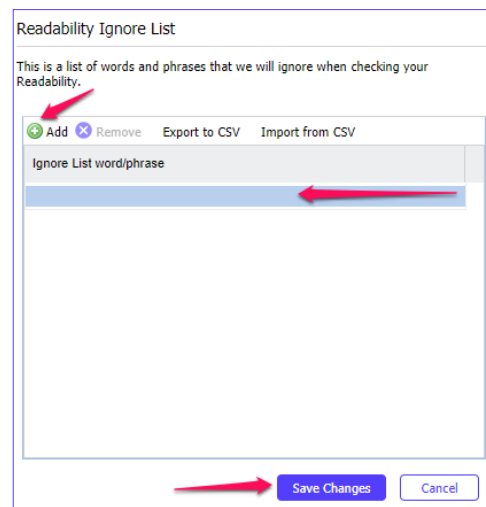
Import your "Ignore list" from .csv

Write your list of terms and phrases within MS Excel before creating in VT Docs.

1. Create a new MS Excel file.

2. Populate Column A with the terms and phrases.

3. Save the file as a .csv file to your local desktop.

Import your Readability "Ignore list" Terms

1. Click on the **"Import from CSV"** button in the **"Readability Ignore list"** dialog box is displayed

2. Select **"Browse"** and locate your csv file location

3. Select your import option. You can Append or Overwrite exiting **"Ignore list".** Keep the default option for your first ignore list.

4. Click **"Import"**

5. Your **"Ignore list"** is displayed on screen.
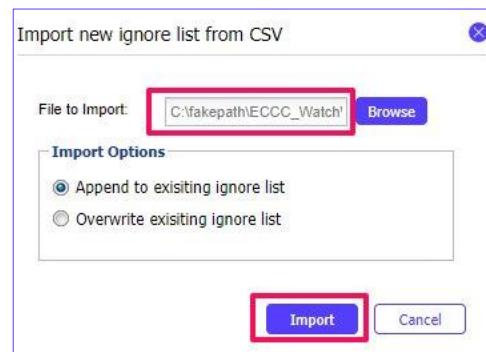
Export your Readability "Ignore list" Terms

1. Click on the **"Export to CSV"** button in the **"Readability Ignore list"** dialog box to review your full Ignore list with your team or use to build a larger list for import.
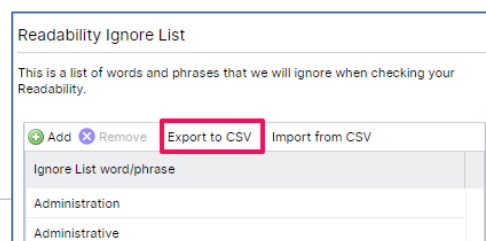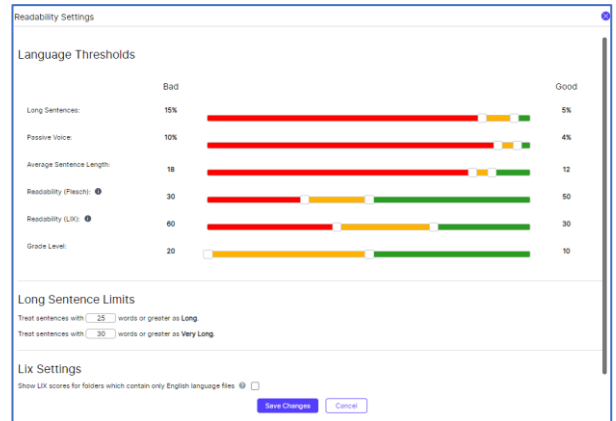
Readability Settings

1. Click on the Settings menu icon.

2. Click the **"Edit"** button opposite **"Readability Settings".**

3. Use the slider to adjust the settings for each Language Threshold.

4. Click **"Save Changes"**.

Acronym Ignore List

1. Click on the Settings menu icon.

2. Click the **"Edit"** button opposite **"Acronym Ignore List".**

3. Click the **"Add"** button to insert the new item.

4. Click **"Save Changes"**.

5. To remove a term, select the row and click **"Remove"**

6. Click **"Save Changes"**.
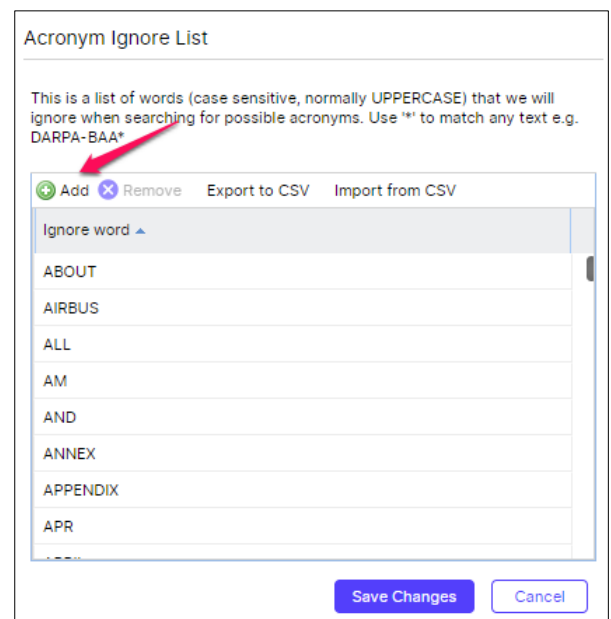
Import your Acronym "Ignore list" Terms

1. Click on the **"Import from CSV"** button in the **"Acronym Ignore list"** dialog box.

2. Select **"Browse"** and locate your csv file location

3. Select your import option. You can Append or Overwrite exiting **"Ignore list".** Keep the default option for your first ignore list.

4. Click **"Import"**

5. Your **"Ignore list"** is displayed on screen.
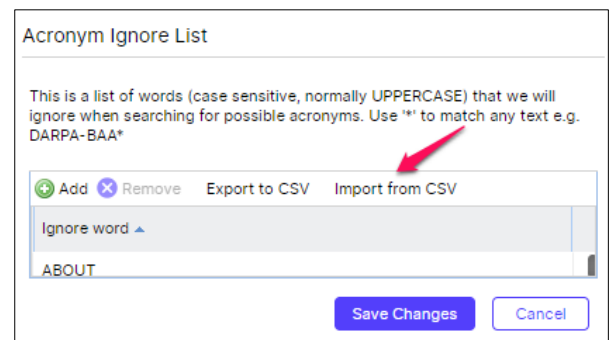
Export your Acronym "Ignore list" Terms

1. Click on the **"Export to CSV"** button in the **"Readability Ignore list"** dialog box to review your full Ignore list with your team or use to build a larger list for import.
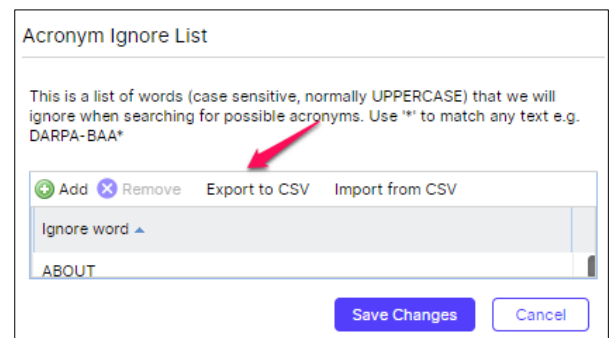
On-Prem renewed license install

The VT Support team will share an email with the .lic file.

Download the license file to your local drive.

Log into VT Docs with your credentials. You must have System Admin privileges.

1.   Click on the System Admin icon on the sidebar

2.   The System Admin interface opens.

3.   Click the **Licence** tab.

4.   Click the **Upload License File button.**

5.   Browse to your saved .lic file and select.

6.   Click the **Upload** button.

7.   Your updated License Information will be shown on the interface.