Easy Setup: Create, Import Produce

iCONECT makes it easy for you to set up a hands-off project. This document covers the template settings that are required so that users can create a project, import, and produce files with ease.

Project Template Setup

Use a project that has the same field structure as the data that will be imported.

The project template must include:

- 2 native file fields:
  - one for native files and
  - one for images that will be imported. Images are converted to searchable PDFs.
- Error Write Back field (for productions)
- Feedback Panel (for productions): records with issues are added to this panel during production
- Processing template
- Field Mapping template
- Production template

Security Settings

Use the Security tile to set applicable security to groups in the project.

Display Access

- Project that is set as a template. This allows users to select the template when they create a project.
- Import Templates:
  - Processing template. These templates are listed as Native (Unstructured).
  - Field Mapping template
- Production template

Display and Modify access

- Fields: in the project, fields that will receive data (through Processed Imports)
- The field designated as the Error Write Back field
- Panel: the Feedback Panel (used for Production issues)

Setting Roles

You can set up one or more roles in your project. Ensure that the following features are set so that users in these roles can create, import, and produce data.

CREATE PROJECT

- Create Projects: allow
- Project Template Access: set to Not Set or Deny. Users do not need to see the project in the Projects list; it is only required for creating a project.

IMPORT

- Default Data Source
- Default Native Path
- Add Records
  - Create Processed Imports
  - Create Native Imports

PRODUCE

- Create Productions
  - Native File Production
  - Native Production to Image Format

The project that you set up for users is meant to do 3 tasks: allow users to create a project, import native (unstructured) or processed data, and produce data.

Setup for the Project Template

1. In the Projects tile, make a copy of your current template. Ensure that the following fields are included in your project:
   - a native file field for native files
   - another native file field that will be used for image files that will be converted to searchable PDFs.
2. In the Projects tile, click **Settings** and ensure that that the following fields are defined in your project:

Field Setup	Required for...
Page Count (under Project Settings)	Productions
Feedback Location (under Production Reporting)	
Error Write Back Field (under Production Reporting)	
Native File Field (under Project Settings)	Imports and Productions
Image Field (under Project Settings)	Productions*

3. When the project is set up with the fields and templates (see the next sections) in the Projects tile, click **Set as Template**.

   NOTE: Once a project is a template, it cannot be changed back to a regular project.

Setup for Importing Data

1. On the Imports page, click **New Native Import Template** and then set up a template that will meet your processing requirements, and then save the template. Contact iCONECT Support for details.
2. To set up a field mapping template for processed imports, ensure that you have a zip file that contains a load file with typical fields.
3. On the Imports page, click **New Import** and select the Processed option. Add your zip file.
4. When the files are uploaded, click to import files. The extracted load files will be listed.
5. In the Field Mapping section, click **New Field Mapping**.
6. Enter the name of the template, and then click in the appropriate fields to map fields in the database.
7. Click **Create** when finished.

Setup for Productions

Before users can produce files from the Productions page, a production template must be available, and fields must be mapped to ensure any errors are easy to fix. To set up a production template,

1. From the Dashboard, open **Production Manager**.
2. From the **New** menu, select Production Template. Set the parameters for the production, and then click **Save**.

iCONECT

Setup for Users: Security and Features

1. In Administration, in the Users tile, create at least one user.
2. Open the **Groups and Roles** tile and click **New** to create a User Role. Ensure that the features listed below are set for the project.
3. Click **New** to create a User Group.
4. Add the user and the role that you created to the group and click **Save**.
5. Open the **Security** tile and then select the group that you just created. Ensure that the security settings listed below are set for the project.

Setting Security

1. In Administration, open the **Security** tile.
2. Select the group or groups that will require access and then select the **Projects** category.
3. Select the project template from the list, and then set **Display** access to it.
4. Select the project from the list (see image).
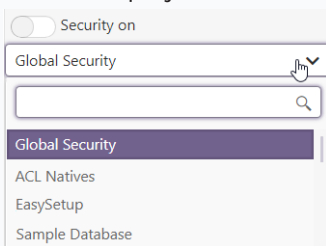
5. Select the following categories to set **Display** and **Modify** access:
   - Fields to which data will be imported (for processed imports)
   - Feedback Location panel
6. Select the project template from the list, and then select the **Import Templates** category, and then set Display access to:
   - Native (unstructured) template
   - Field Mapping template
7. Select the Production Templates category, and then set Display access to the template(s) that users can use to create templates. Set **Display** access.

Setting Features

1. In Administration, open the **Features** tile.
2. Select the role or roles that will require access.
3. Set the following features to **Allow**:
   - Create Projects
   - Default Data Source
   - Default Native Path
   - Add Records
   - Create Processed Imports
   - Create Native Imports
   - Create Productions
   - Native File Production
   - Native Production to Image Format
4. Set the following feature to Not Set or **Deny**:
   - Project Template Access