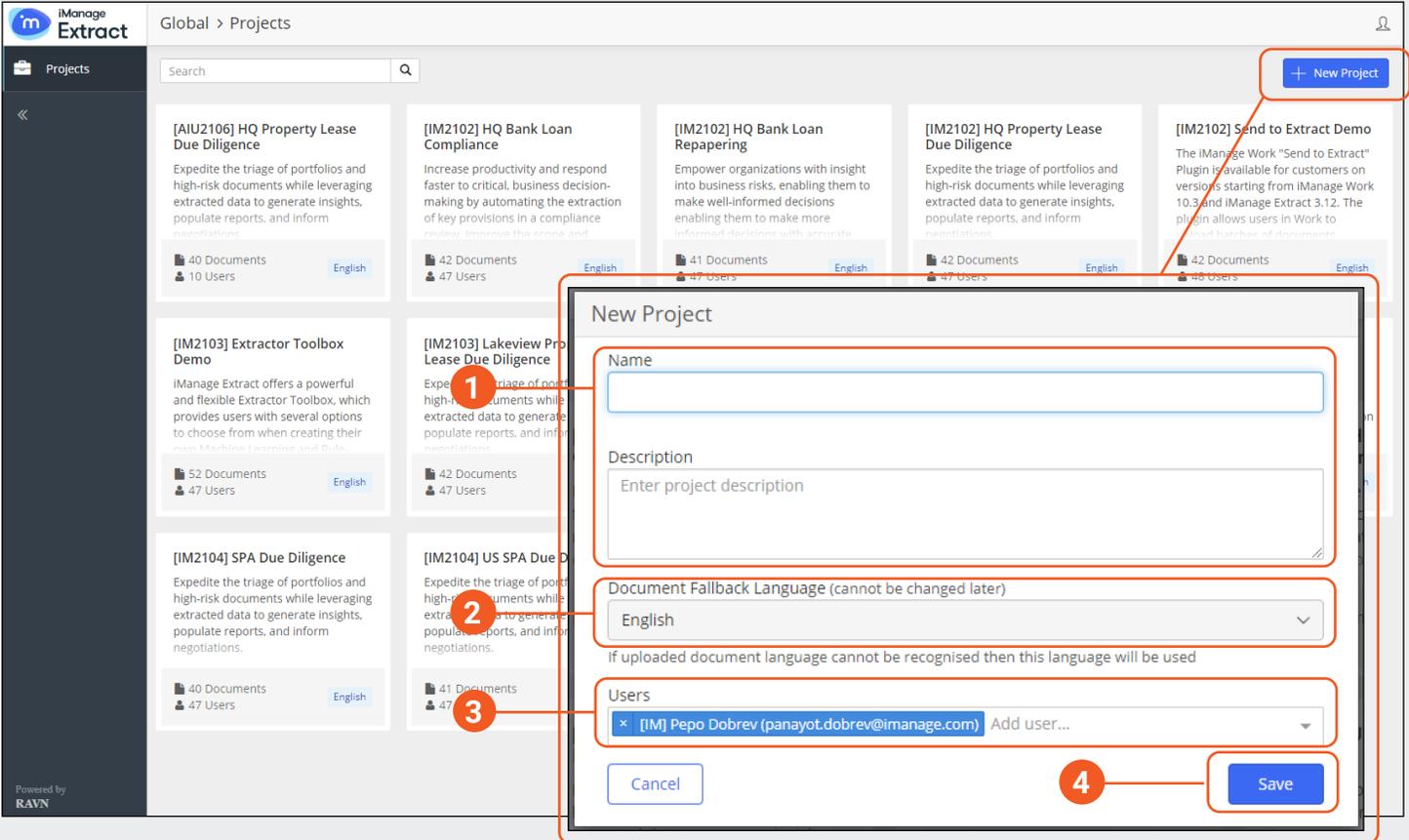


Creating a Project

You can create projects in iManage Extract if you want a certain document set to be worked upon by a specific set of users. Example of projects can be geography based, document type specific (.pdf or .xlsx), functional area related (vendor leases, employment contracts) or a combination of two or more parameters. Documents uploaded into one project are visible only within that project, and not from other projects. Users must be given permission to view projects. Hence, project creation is typically followed by adding users to projects and assigning roles to the added users. After you sign in, you are navigated to the **Projects** page, by default:



The screenshot shows the iManage Extract interface with a grid of project cards. A 'New Project' dialog box is open, highlighting the following steps:

- Name and Description:** Fields for 'Name' and 'Description' (with placeholder 'Enter project description').
- Document Fallback Language:** A dropdown menu set to 'English' with a note: 'If uploaded document language cannot be recognised then this language will be used'.
- Users:** A dropdown menu showing '[IM] Pepo Dobrev (panayot.dobrev@imanager.com)' and an 'Add user...' button.
- Saving your Project:** 'Cancel' and 'Save' buttons.

1. Name and Description

Specify the project details. Name is a mandatory field to create a new project.

3. Users

Select the list of users you want to provide access to the project from the users drop-down list.

2. Document Fallback Language

Select a language that you want to train extractors in.

NOTE: Once selected, language cannot be changed later.

4. Saving your Project

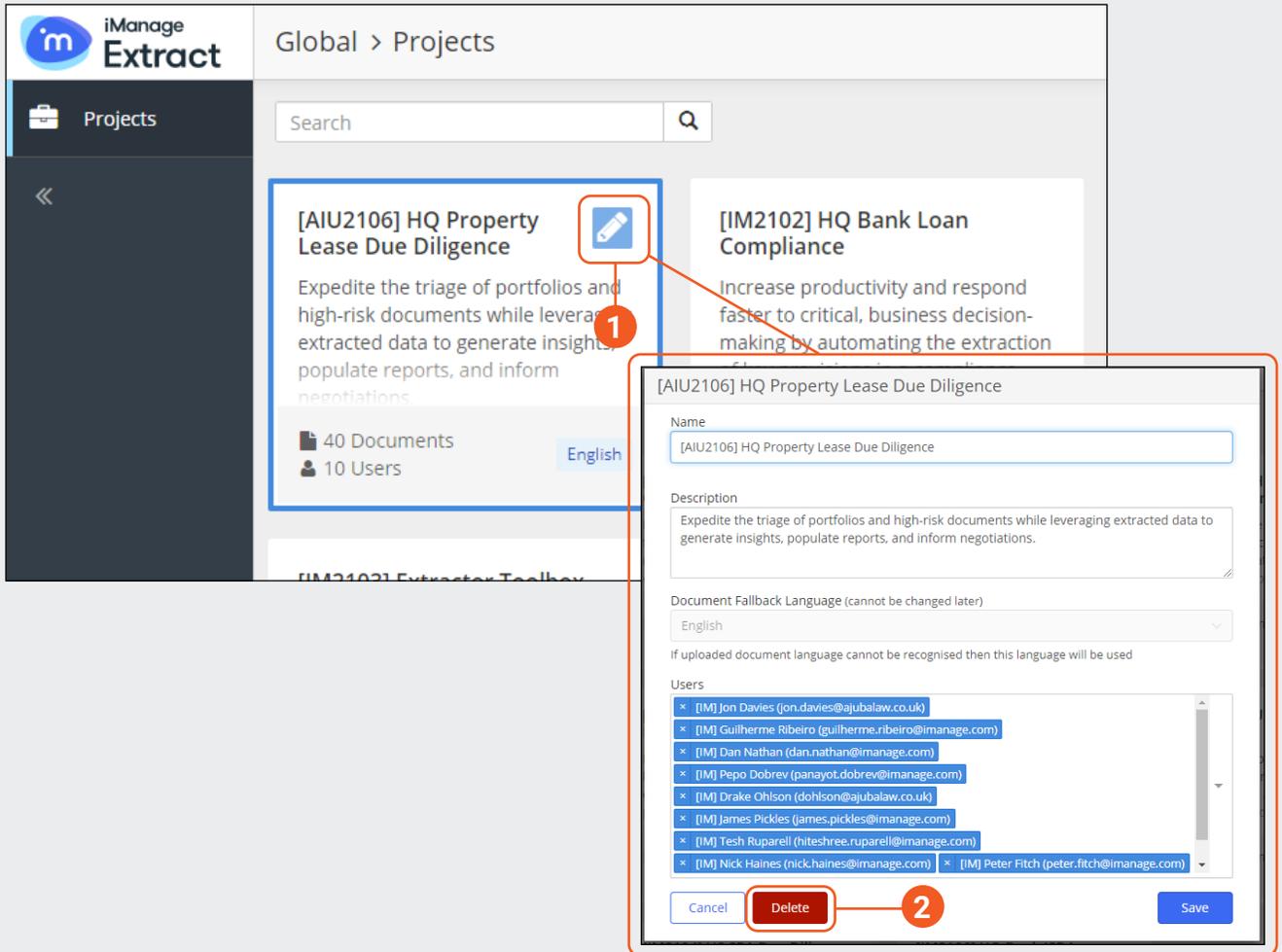
Select **Save** - the project is created. If you are a **Superuser**, a dialog box prompts asking if you want to upload documents to the project.

NOTE: You can view only those projects to which you are assigned to.

When you create a new project, you are assigned to it, by default. You may, however, un-assign yourself from the project. If you un-assign yourself from a project, the project ceases to appear in your projects page.

Creating a Project (continued)

You can edit the name and description of a project and delete a project to which you are assigned to.



1. Edit

Select  in the project pane where you want to edit the details. The **Project** dialog box appears where you can edit the **Name**, the **Description** and add/remove users.

2. Delete

Select **Delete** to delete a project.