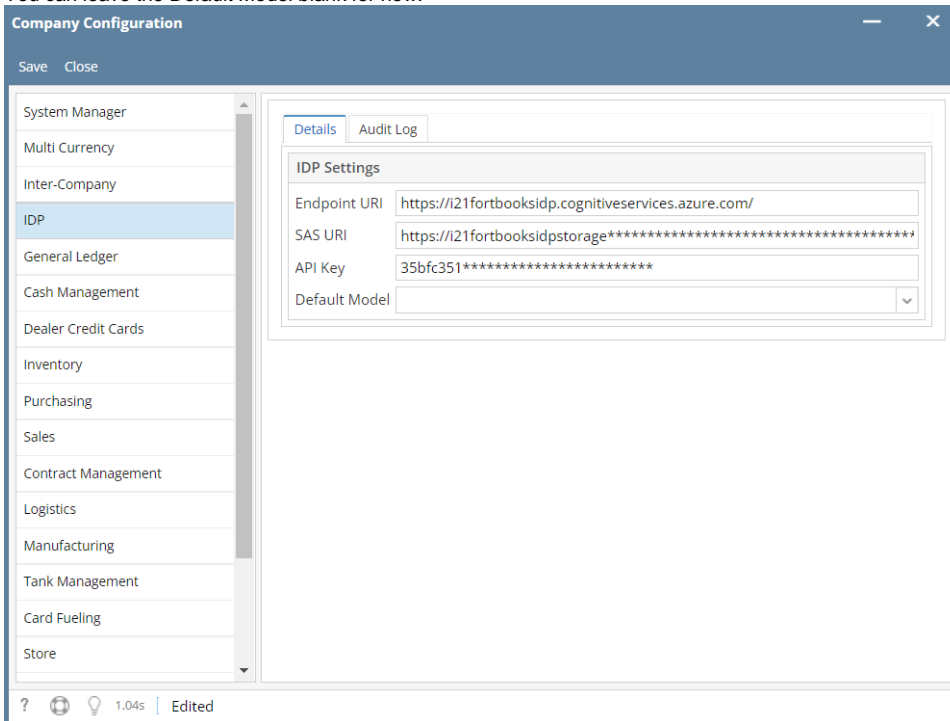# IDP - Overview and Setup

Before you can use IDP, iRely must provide the following credentials which are unique for each customer.

1. Endpoint URI
2. SAS URI
3. API Key

Step 1 - Company Configuration

1. Enter your IDP credentials on the Company Configuration. This is done by iRely or your Administrator.
2. Open the **Company Configuration** to the **IDP** menu.
3. Enter the Endpoint URI, SAS URI and API Key that you received from iRely.
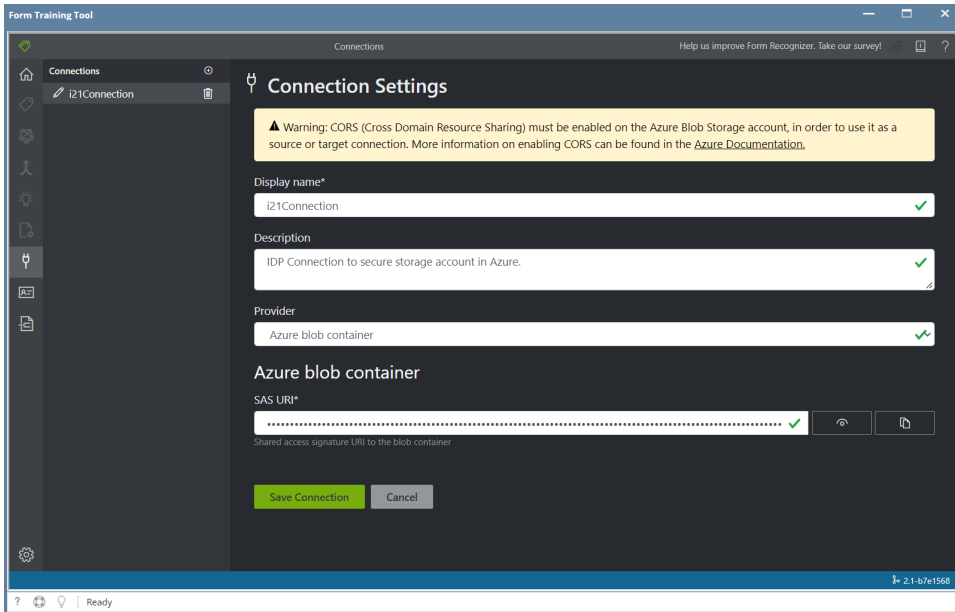4. You can leave the Default Model blank for now.

5.

Company Configuration — □ ✕

Save   Close

System Manager	**Details** Audit Log
Multi Currency	**IDP Settings**
Inter-Company	Endpoint URI https://i21fortbooksidp.cognitiveservices.azure.com/
IDP	SAS URI https://i21fortbooksidpstorage***
General Ledger	API Key 35bfc351***********************
Cash Management	Default Model
Dealer Credit Cards	
Inventory	
Purchasing	
Sales	
Contract Management	
Logistics	
Manufacturing	
Tank Management	
Card Fueling	
Store	

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Step 2 - Connection Settings

1. You only need to create 1 Connection which uses your SAS URI provided by iRely. This connection can be used by all your IDP projects and custom models.
2. Open the IDP menu and select **Connections**.
3. In the **Connection Settings** enter the following details and **Save** the connection.
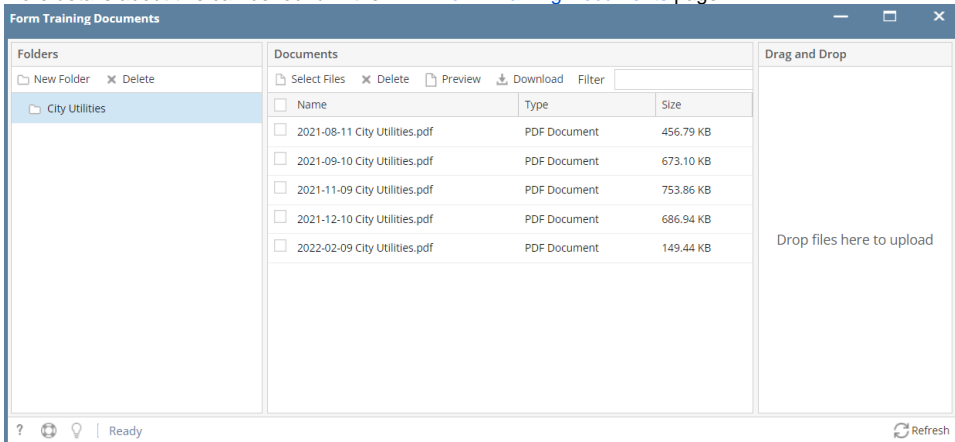
Field	Description
Display Name	Enter a name for the Connection
Description	Optionally enter a description
Provider	Azure blob container
SAS URI	Enter the SAS URI that iRely provided you

4.

Step 3 - Form Training Documents

1. Before you can use IDP, you must upload at least 5 documents to train per document you plan to use.
2. Open the **Form Training Documents** screen.
3. Click the **New Folder** button and add a folder name for the document you wish to train a model for.
4. Then select the folder you just created and drag and drop at least 5 documents you will use to train the model.
5. More details about this can be found in the IDP - Form Training Documents page.

6.

Step 4 - Create a Project

1. Open the Projects screen and click the "**New**" button in the toolbar.
2. Click the "**Use Custom to train a model with labels and get key value pairs**".
3. Then click "**New Project**"
4. Enter the following fields and click **Save Connection** when you are finished.

Field	Description
Display Name	Enter a name for the Project.
Security Token	Leave the default of "Generate New Security Token".
Secure Connection	Select the Connection name you created in Step 2.
Folder Path	Enter a unique Folder name for the project. This can be the same name as the Display Name.
For recognizer service URI	Enter your Endpoint URI here.
API Key	Enter your API Key here.

API version	Leave the default value of "v2.1 (default)"
Description	Optional description for the project.

5. Then you should see the 5 documents you added to the Form Training Documents screen and can begin tagging them.

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