

Choosing Between Manual and Connected Project Setup

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Comparing Connected and Manual Project Setup During Onboarding

When you create a project in Atloria during onboarding, you typically choose between two setup paths: a **connected** setup that links the project to an external source, or a **manual** setup where you enter the project details yourself. If you need a refresher on getting to the onboarding flow, see [Creating Projects and Completing Onboarding](#).

A **connected** setup is the better fit when your team already has a project, account, or source record in another connected workspace and you want Atloria to start from that existing information. In the onboarding flow, this option lets you pick an available connection, browse or search for the external record, and review imported details before you create the project. The imported values can include the **project name**, related **client or account details**, and other source information shown in the onboarding review step. This helps reduce re-entry and keeps the new Atloria project aligned with the record your team already uses elsewhere.

A **manual** setup is the better fit when you want to start with a clean project inside Atloria. In this path, the onboarding form depends on what you type into the setup fields instead of pulling values from a connected source. You enter the core project details directly, choose the internal owner, and set the initial configuration values that should apply from day one.

Use this decision guide when choosing:

Setup choice	Best when	What you manage during onboarding
Connected setup	Another tool already holds the main project record	Review imported values and confirm the link
Manual setup	Atloria should be the starting point for the project	Enter project details and defaults yourself

Choose **connected setup** if an external record is already your team's source of truth or if you expect the project to stay linked. Choose **manual setup** if you do not need that relationship, if the outside record is incomplete, or if you want full control over the starting configuration inside Atloria.

Checking What You Need Before Choosing a Setup Method

Before you decide which setup path to use, make sure you have the right access and the right project information ready. This avoids stopping midway through onboarding and helps you create the project correctly the first time.

For a **connected** setup, you need access to a usable connection in Atloria and enough permission to browse the external records available through that connection. During onboarding, Atloria may ask you to complete an authentication step before you can search for the project or account you want to link. If you cannot see the connection, cannot open its records, or cannot finish the sign-in step, the connected option may not be available to you yet.

For a **manual** setup, gather the project details you want to enter directly into the onboarding form. At minimum, be ready with the project name and the person who should own or manage it in Atloria. You should also know any internal preferences or defaults your team expects to use from the start, especially if those values would normally come from a connected source.

Use this checklist before choosing:

- For connected setup, confirm:
 - A connection is available in Atloria
 - You can browse or search the external account or project record
 - You can complete any required sign-in or authorization step
 - The external record contains the details you want Atloria to use
- For manual setup, confirm:
 - You know the project name
 - You know who should own the project internally
 - You know the default preferences or tracking choices your team expects
 - You are ready to enter any details that will not be imported automatically

Avoid connected setup when the source record is incomplete, when you do not have access to the connection, or when you do not want Atloria tied to that outside record.

On the other hand, manual setup can create extra follow-up work if you later need to recreate client relationships, add mappings, or re-enter project attributes that a connected setup could have brought in during onboarding.

Setting Up a Project from a Connected Integration

If your team already tracks the project in a connected source, use the connected setup path during onboarding so Atloria can start with the existing record instead of a blank form.

1. Open the project creation flow in onboarding and choose the option for a **connected** or integration-based setup.
[SCREENSHOT: Project onboarding screen showing manual and connected setup choices]
2. Select the connection you want to use. If more than one connection is available, choose the one that contains the correct external account or project record.
3. Browse or search for the external record you want to link. Depending on what is available in the connection, you may be choosing an account, a client record, or a project record.
4. Review the imported values before you create the project. Focus on the details Atloria has prefilled from the connected source, such as the **project name**, related **client or account information**, and any other source details shown in the review step.
5. Confirm the project creation to create the Atloria project from the linked record.

After the project is created, Atloria uses the imported values as the starting point for the new project. Some project details remain editable in the project settings after creation, especially internal values such as the display name, assignments, and optional configuration choices. If the project stays linked to the connected source, the linked relationship continues to matter for future updates and mapping decisions, so review those values carefully before confirming.

Connected setup is especially useful when you want consistency between Atloria and the external record your team already trusts. It reduces manual entry, but it also means you should pay close attention to the review screen so the project starts with the correct linked source and the right imported details.

Creating a Project Manually When You Need Full Control

Choose the manual setup path when you want to define the project directly in Atloria instead of pulling details from a connected source. This is the best option when the project is new, when no connection is available, or when you want to avoid creating an ongoing link during onboarding.

1. In the onboarding project creation flow, choose the **manual** setup option instead of selecting a connection.
2. Enter the required project details in the creation form. At minimum, this includes the **project name** and the other setup fields shown on the screen for administrator-managed defaults.
3. Choose the internal owner and set the starting values that your team wants Atloria to use from the beginning. Because no external source is filling in the form for you, this is where you define the project's internal categorization and project-specific preferences.
4. Review the form carefully before saving. Manual setup depends entirely on what you enter here, so it is worth checking names, assignments, and default choices before you create the project.
5. Create the project to finish onboarding.

[SCREENSHOT: Manual project setup form with project name, owner, and default settings]

The main advantage of manual setup is control. You decide exactly how the project starts, and you are not limited by the quality or structure of an outside record. This is useful when the project should be managed only inside Atloria or when the external information is not ready yet.

The tradeoff is that anything a connected setup would have brought in automatically must be added later by hand. If you eventually want to connect the project to another source, add mappings, or import related data, you will do that after onboarding from the project's settings and related setup areas. Manual setup works well when you want a clean starting point, but it requires a little more attention up front.

Adjusting Project Details After the Project Is Created

After onboarding, you can still review and update project information from the project's settings areas. This is useful whether you started with a connected setup or a manual setup, because the first version of the project often needs small corrections before the rest of the team begins working in it.

Open the project from your project list, then go to the project details and related setup areas for that project. If the project uses a connection, also review the integration or mapping area linked to that project so you can confirm the external record is attached correctly and make any follow-up changes that are available there.

These are the kinds of values you can typically review and adjust after creation:

Area to review	Common updates after onboarding
Project details	Display name and other visible project information
Internal assignments	Owner and team-related assignments
Optional configuration	Default preferences and project-specific settings
Connected setup areas	Linked source record and related mapping choices

For **connected projects**, post-creation work usually focuses on checking imported values, correcting anything that came in incorrectly, and confirming the linked source is the right one. If you need to change how the project is connected, do that from the project's connection or mapping settings rather than trying to rebuild the project from scratch.

For **manual projects**, follow-up work usually means filling in anything you skipped during onboarding and adding any connection or mapping later if the project eventually needs one. Because there is no external source to backfill missing values, manual projects should be reviewed more carefully after creation.

Common adjustments include correcting imported names, filling in missing project details, updating internal ownership, and setting defaults before writers, reviewers, or administrators begin using the project regularly.

Verifying Your Setup

Once the project is created, take a few minutes to confirm everything looks right before your team starts using it. This final check is especially helpful because setup issues are easier to fix immediately after onboarding than after documents, versions, or approvals have already been added.

Start in the **project list** and confirm the project appears with the expected name. If your team uses ownership or assignment details in the list or project summary, make sure those values match what you selected during onboarding. If Atloria shows any visual sign that the project was created from a connected source, confirm that it matches the setup path you intended to use.

Then open the project and review the main project details. Check that the project opens normally and that the settings screens load without errors or missing information. If you see warnings about incomplete configuration, missing mappings, or unfinished setup, resolve those items before moving on.

Use the right verification approach for your setup type:

- For connected projects:
 - Confirm the connection is active
 - Confirm the linked external record is the correct one
 - Check that imported values match the source record you selected
 - Review any mapping or linked setup area for missing items
- For manual projects:
 - Confirm all required fields were saved
 - Check that the owner and defaults are correct
 - Review project details for anything left blank
 - Make sure no expected values were skipped during form entry

[SCREENSHOT: Project details screen after creation showing project name, owner, and connection status]

If the project opens cleanly, shows the right details, and does not display setup warnings, you are in a good position to continue. The next step is learning how to revisit and manage these setup choices over time in [Managing Project Setup Decisions After Onboarding](#).

Overview

This guide focuses on one decision in Atloria's onboarding flow: whether to create a project from a connected source or enter the project details manually. Both options create a project you can continue working with, but they lead to different setup work during and after onboarding.

A connected setup is designed for teams that already have a project or account record elsewhere and want Atloria to begin with that existing information. During onboarding, you select a connection, choose the external record, and review the values Atloria imports before you confirm creation. This path is useful when another workspace already holds the information your team considers authoritative.

A manual setup is designed for teams that want to start directly in Atloria. Instead of selecting an outside record, you complete the onboarding form yourself and set the project's initial details, ownership, and defaults by hand. This path is useful when no connection is available, when the outside information is incomplete, or when you want the project to begin with an internal-only configuration.

This guide shows you how to compare the two choices, prepare the information each one requires, create the project using either path, and verify the result afterward. It does not repeat the full onboarding walkthrough from [Creating Projects and Completing Onboarding](#); instead, it helps you make the setup choice inside that flow with more confidence.

If you are the person responsible for creating or administering projects, use this guide to decide which setup method will save time now without creating avoidable cleanup later.

Prerequisites

Before you work through this setup decision in Atloria, make sure you are ready to create a project and that you have the information needed for the setup path you plan to use.

You should already have access to Atloria and be able to reach the project onboarding flow. If you have not done that yet, start with [Creating Projects and Completing Onboarding](#). This guide assumes you are already at the point where Atloria asks how you want to create the project.

Have these basics ready before you begin:

- Access to the project creation flow in Atloria
- A clear decision about whether the project should start from an external source or from a clean manual setup
- The project name and internal ownership details you want to use
- Any project defaults or preferences your team expects to set during onboarding

If you plan to use a connected setup, also make sure you have:

- An available connection in Atloria
- Permission to browse or search the external records in that connection
- The ability to complete any sign-in or authorization step required during onboarding

- Confidence that the external record contains the details you want Atloria to use

If you plan to use manual setup, make sure you are prepared to enter all important values yourself, because Atloria will not import missing details from an outside source later in the onboarding form.

This preparation is usually enough to move through the setup choice without interruption and create a project that is ready for the next stage of configuration.