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Orasis Capture

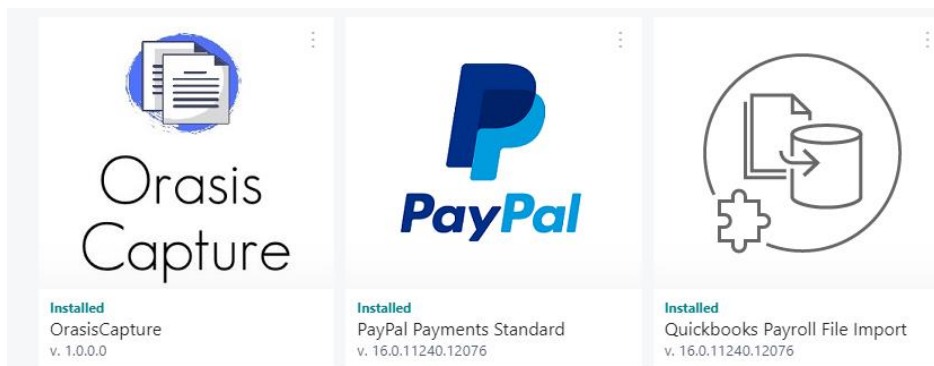
Dynamic Document Capture
for Microsoft Dynamics 365 Business Central



Key Usage Scenarios

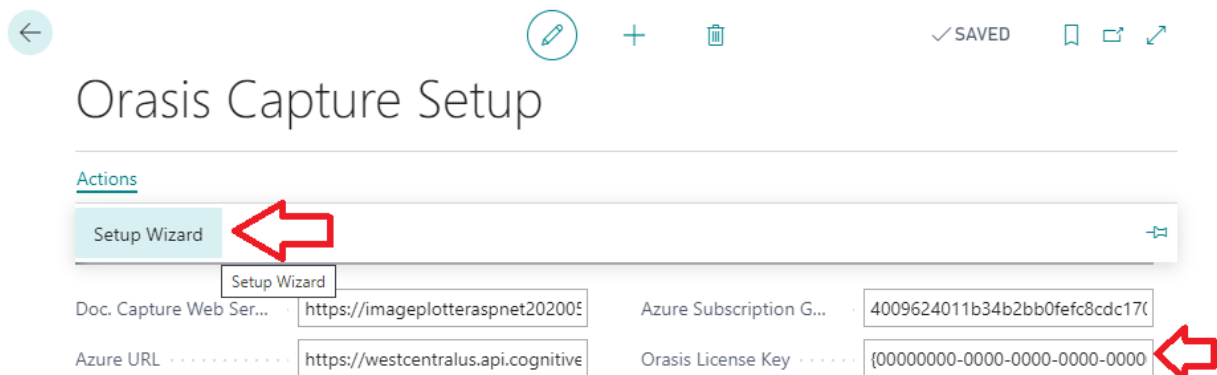
Installation & Setup

1. Install the extension from the Microsoft AppSource store or manually using the .app extension file.



Quick Setup

Go to “Orasis Capture Setup” and click “Setup Wizard” to initiate an example configuration



License Key

Contact support@dionix.co.uk to obtain an Orasis Capture License key and put that into the Setup page in business central.

Azure Subscription Guid

You will need to sign up and create an account with Azure Cognitive services

<https://azure.microsoft.com/en-gb/services/cognitive-services/>

From here you will be able to retrieve your Azure subscription guid to enter into Orasis setup

Azure URL

Select the relevant azure URL and enter it in the “Azure URL” field:

Australia East - <https://australiaeast.api.cognitive.microsoft.com/vision/v2.1/ocr>

Brazil South - <https://brazilsouth.api.cognitive.microsoft.com/vision/v2.1/ocr>

Canada Central - <https://canadacentral.api.cognitive.microsoft.com/vision/v2.1/ocr>

3

Central India - <https://centralindia.api.cognitive.microsoft.com/vision/v2.1/ocr>

Central US - <https://centralus.api.cognitive.microsoft.com/vision/v2.1/ocr>

East Asia - <https://eastasia.api.cognitive.microsoft.com/vision/v2.1/ocr>

East US - <https://eastus.api.cognitive.microsoft.com/vision/v2.1/ocr>

East US 2 - <https://eastus2.api.cognitive.microsoft.com/vision/v2.1/ocr>

France Central - <https://francecentral.api.cognitive.microsoft.com/vision/v2.1/ocr>

Japan East - <https://japaneast.api.cognitive.microsoft.com/vision/v2.1/ocr>

Japan West - <https://japanwest.api.cognitive.microsoft.com/vision/v2.1/ocr>

Korea Central - <https://koreacentral.api.cognitive.microsoft.com/vision/v2.1/ocr>

North Central US - <https://northcentralus.api.cognitive.microsoft.com/vision/v2.1/ocr>

North Europe - <https://northeurope.api.cognitive.microsoft.com/vision/v2.1/ocr>

South Africa North - <https://southafricanorth.api.cognitive.microsoft.com/vision/v2.1/ocr>

South Central US - <https://southcentralus.api.cognitive.microsoft.com/vision/v2.1/ocr>

Southeast Asia - <https://southeastasia.api.cognitive.microsoft.com/vision/v2.1/ocr>

UK South - <https://uksouth.api.cognitive.microsoft.com/vision/v2.1/ocr>

West Central US - <https://westcentralus.api.cognitive.microsoft.com/vision/v2.1/ocr>

West Europe - <https://westeurope.api.cognitive.microsoft.com/vision/v2.1/ocr>

West US - <https://westus.api.cognitive.microsoft.com/vision/v2.1/ocr>

West US 2 - <https://westus2.api.cognitive.microsoft.com/vision/v2.1/ocr>

Allow HTTP Request

Go to "Extension Management".

Select the "Orasis Capture" extension.

Go to "Configure"

Select the toggle to allow "HTTPClient Request"

Status	Extension Name	Version
Installed	Orasis Capture	v. 1.0.0.0
Installed	PayPal Payments Standard	v. 16.1.12629.12805
Installed	Quickbooks Payroll File Import	v. 16.1.12629.12805
Installed	Sales and Inventory Forecast	v. 16.1.12629.12805
Installed	Send remittance advice by email	v. 16.1.12629.12805
Installed	Send To Email Printer	v. 16.1.12629.12805
Installed	System application	v. 16.1.12629.12805

...SION SETTINGS | WORK DATE: 4/6/2020

Orasis Capture

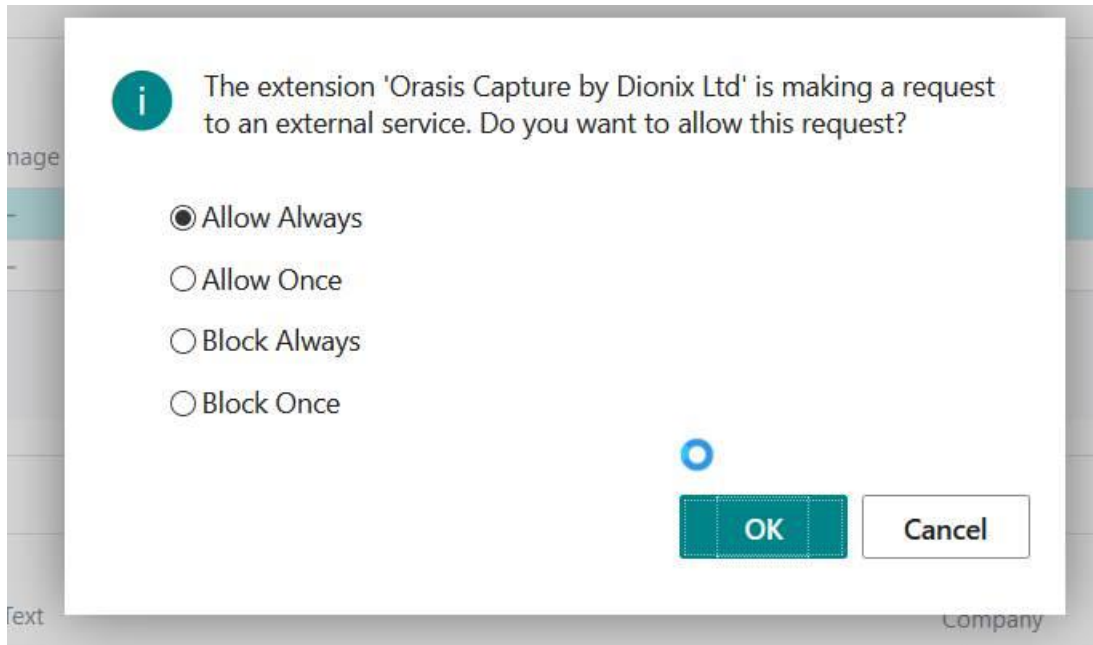
Group

App ID	608dbb40-fdfe-450b-a345-c14...	Publisher	Dionix Ltd
Name	Orasis Capture	Allow Http Client Requ...	<input checked="" type="checkbox"/>

External service request – Always Allow

When using Orasis Capture for the first time the system will prompt you with the following window – make sure you select “Always Allow”.

5

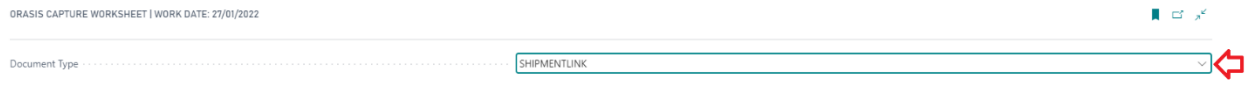


Example Scenario – “Internal” Documents

Business central generated Shipment note linked to Business central Sales Shipment record

3 Go to “Orasis Capture Worksheet”

4 Select the “SHIPMENTLINK” option in the “Document Type” field at the top of the page



5 Go to “Actions”>>Import PDF and select the “Example Shipment 1” example pdf included in the software package

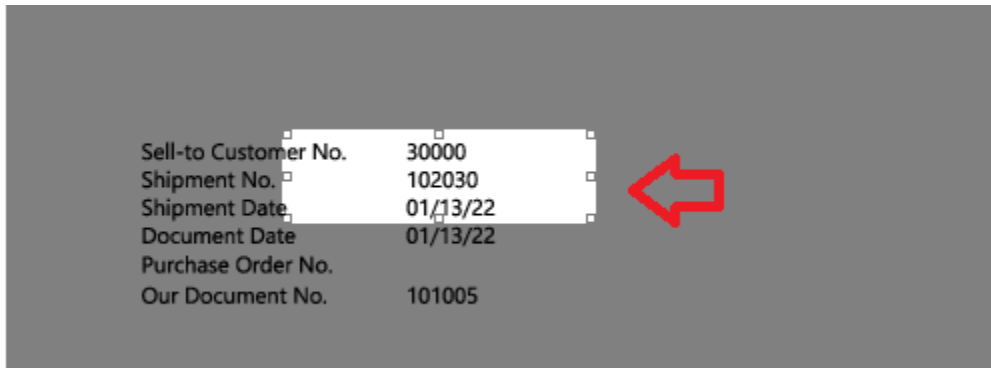
6 Select the newly created worksheet line then go to the “Header Mapping” “No.” line and click into the “Field Value” field

Field	Field Value	X Filter	Y Filter	Plot Made
→ No.	: 30000 01/13/22 01/13/22 102030	591.71685235..955.85029995	738.77074465..1022.3746798	<input checked="" type="checkbox"/>

7 The document mapping “Dionix OCR Viewer” page will open

8 Drag a large rectangle over the Shipment no. value and click submit

6



9 Click Actions>Process Document. The line should turn green and a link should be created.

10 Go to Actions>>Import PDF and select “Example Shipment 2”. The system should automatically link the PDF based on the “training” of the first document

ORASIS CAPTURE WORKSHEET | WORK DATE: 27/01/2022

Document Type: SHIPMENTLINK

Manage | Actions | Fewer options

Entry No. ↑	Filename	Image	Capture Document Type	Internal Document	Company No.	Linked/Created Record
2	Example Shipment 1		SHIPMENTLINK	<input checked="" type="checkbox"/>		Sales Shipment Header: 102030
3	Example Shipment 2		SHIPMENTLINK	<input checked="" type="checkbox"/>		Sales Shipment Header: 102033

Ocap Document Viewer

11 “Orasis Capture Document Archive” allows the user to access the archived documents within the system

ORASIS CAPTURE DOCUMENT ARCHIVE | WORK DATE: 06/04/2020

Manage | Export Archived Document | Actions | Fewer options

Entry No. ↑	Filename	Image	Capture Document Type	Internal Document	Linked/Created Record
35	Example Shipment 3		SHIPMENTLINK	<input checked="" type="checkbox"/>	Sales Shipment Header: 102025
	Example Shipment 1		SHIPMENTLINK	<input checked="" type="checkbox"/>	Sales Shipment Header: 102030

Ocap Archive Document Viewer

NOTES:

Orasis Capture Worksheet

ORASIS CAPTURE WORKSHEET | WORK DATE: 27/01/2022 ✓ SAVED

Document Type: 1 PURCHINVLINK

Manage | Actions | Fewer options

Entry No. ↑	Filename	Image	Capture Document Type	Internal Document	Company No.	Linked/Created Record
1	Invoice Example 1		PURCHINVLINK	<input type="checkbox"/>	01254796	Purchase Header: Invoice,1005
2	Invoice Example 2		PURCHINVLINK	<input type="checkbox"/>	01587796	Purchase Header: Invoice,1006
3	Invoice Example 3		PURCHINVLINK	<input type="checkbox"/>	01863656	Purchase Header: Invoice,1007
5	Invoice Example 1		PURCHINVLINK	<input type="checkbox"/>	01254796	Purchase Header: Invoice,1005
6	Invoice Example 2		PURCHINVLINK	<input type="checkbox"/>	01587796	Purchase Header: Invoice,1006
7	Invoice Example 3		PURCHINVLINK	<input type="checkbox"/>	01863656	Purchase Header: Invoice,1007
8	Invoice Example 4		PURCHINVLINK	<input type="checkbox"/>	01863656	Purchase Header: Invoice,1008

Ocap Document Viewer

5

Ocap Record Link Factbox

Record ID: [dropdown] URL1

Record ID: [dropdown]

Oras Capture Entry Pattern Plot | Manage

6

Plot No. ↑	Plot Text	Unique to Company
1	Invoice	<input type="checkbox"/>
2	From:	<input type="checkbox"/>
3	To:	<input type="checkbox"/>
4	Service	<input type="checkbox"/>

Oras Capture Entry Header Mapping | Manage

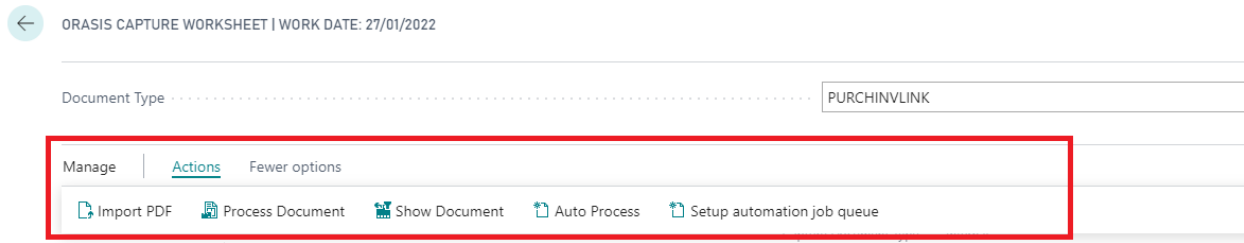
7

Field ↑	Mapping Type	Static Value	Field Value	X Filter	Y Filter	Plot Made
Buy-from Vendor No.	Template Co...					<input type="checkbox"/>
Document Type	Static	Invoice				<input type="checkbox"/>
Vendor Invoice No.	Dynamic		INV-3337	2055.25320905.2871.052183	420.153978.724.76561205	<input type="checkbox"/>

8

- 1 Shows the Document type for which the worksheet is showing documents
- 2 Shows the worksheet lines i.e. the inbound documents being processed
- 3 Shows the Company number found by the system for the inbound document (only relevant for external documents. inbound documents do not require a company no.)
- 4 Shows the Business Central record to which the inbound document has been linked
- 5 Shows a preview of the inbound processed document
- 6 shows the "Pattern Plot" where the unique signature of an external document is plotted (not relevant for inbound documents)
- 7 Shows the Header Mapping lines where the unique document reference is mapped - this is necessary for the automatic linking
- 8 Shows the unique reference mapped on the inbound document, in this case the invoice no.

Actions



- 1 Import PDF is for manually importing a single document to the worksheet
- 2 Process Document is to process (link) a document once it has been set up for the first time
- 3 Show document will open the Business central document that has been linked to
- 4 Auto process will automatically process all document in the inbound folder for the current document type on the worksheet
- 5 Setup automation job queue will automatically set up a job queue to continually process all inbound documents for all document types

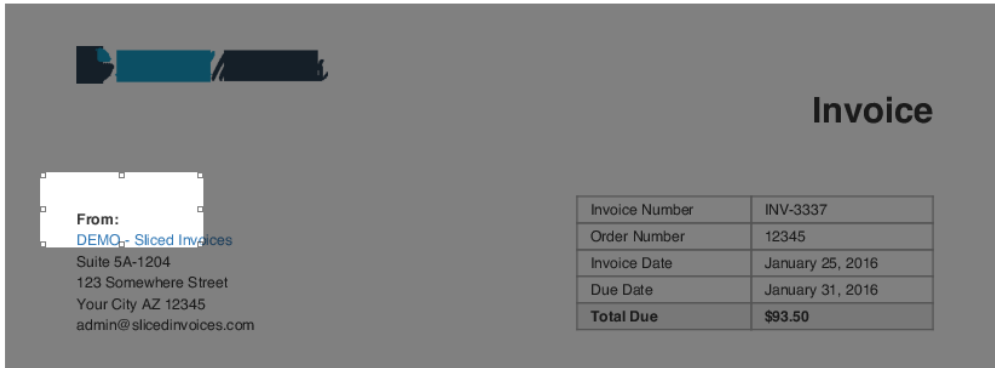
Document Mapping

Pattern Mapping

Used by the system to create a unique “fingerprint” for the external document.

Map 4 or more fixed terms on the page for example captions:

{1FB3AF9E-800A-4903-95} 2 Submit



The image shows a preview of an invoice document. At the top left is a logo consisting of three overlapping shapes in teal, dark blue, and black. To the right of the logo, the word "Invoice" is displayed in a large, bold, black font. Below the logo, there is a "From:" section with the following text: "DEMO - Sliced Invoices", "Suite 5A-1204", "123 Somewhere Street", "Your City AZ 12345", and "admin@slicedinvoices.com". To the right of this text is a table with the following data:

Invoice Number	INV-3337
Order Number	12345
Invoice Date	January 25, 2016
Due Date	January 31, 2016
Total Due	\$93.50

Field Mapping

Create a large box around the field reference so that the system can link the document

{E660BBB5-7F37-4533-96} 2 Submit



The image shows the same invoice document preview as above, but with a large white rectangular box drawn around the "Invoice Number" field in the table. The "From:" section text is the same as in the previous image. Below the "From:" section, there is a "To:" section with the following text: "Test Business", "123 Somewhere St". The table data is the same as in the previous image.