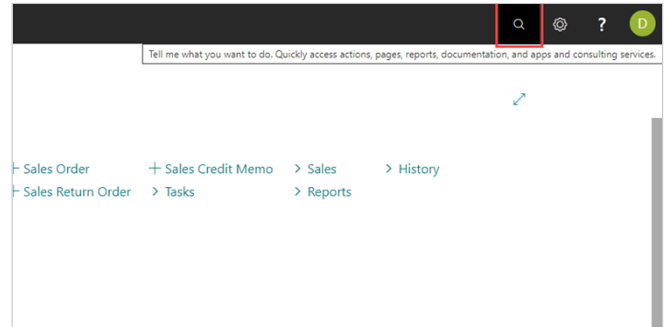
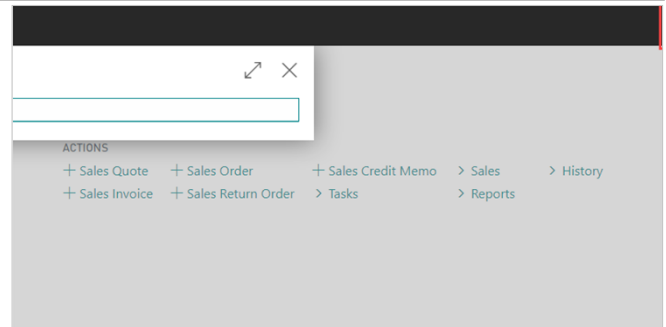


Setting up Continia Document is easily completed by using the built-in setup wizard.

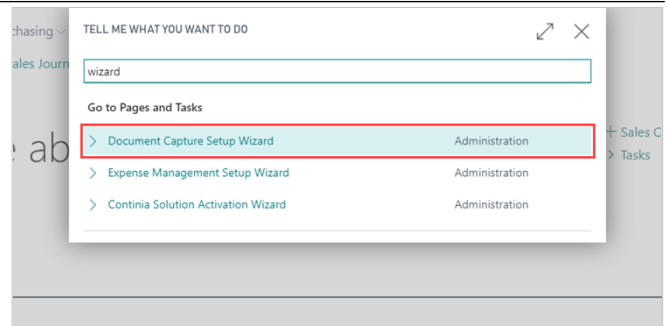
Select the **"magnifier"** to find the Document Capture Setup Wizard.



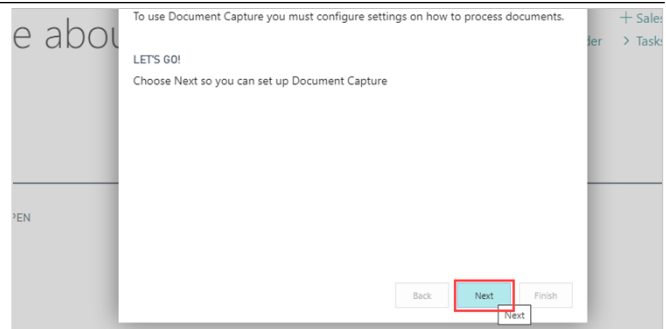
Enter the text **"wizard"** to start searching.



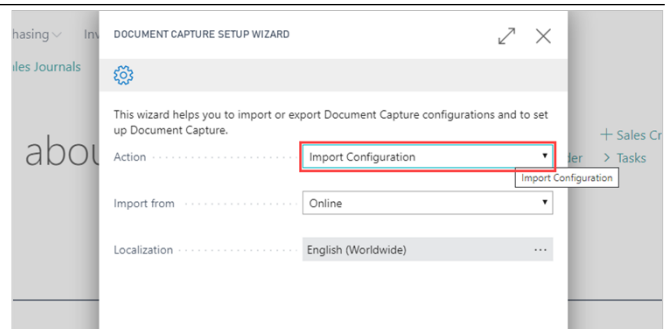
Select **"Document Capture Setup Wizard"**.



Select **"Next"** to start the wizard.

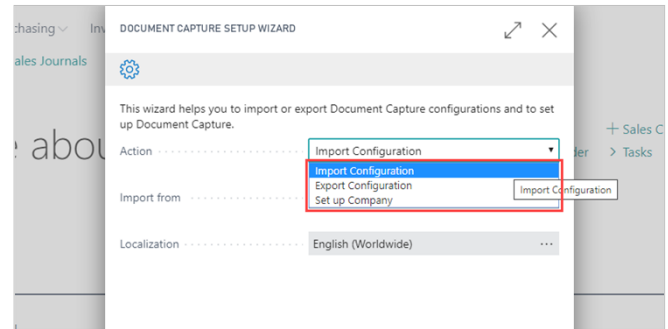


The wizard helps you to import or export Document Capture configurations and to set up Document Capture. Please notice, that the current configuration step is saved when selecting "Next" in the wizard. Choose that action, for which you need help from the wizard, by selecting the dropdown in the field **"Action"**



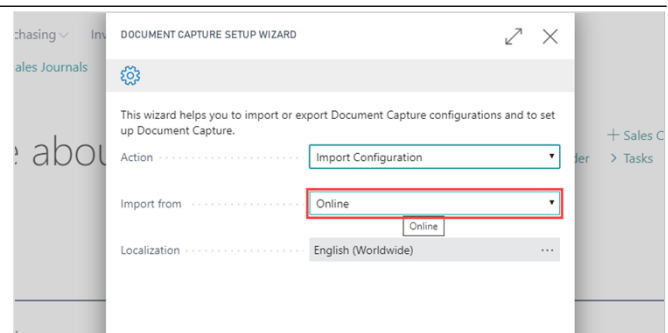
The list of actions contains 3 options: Import Configuration, Export Configuration and Set up Company.

The first time you run the Document Capture Setup Wizard, the wizard suggests **"Import Configuration"**. This will import the standard configuration, which is an excellent starting point in a customer implementation. The option "Export Configuration" will export the current setup of Document Capture to a file, that could be used for copying the setup to another company or database.



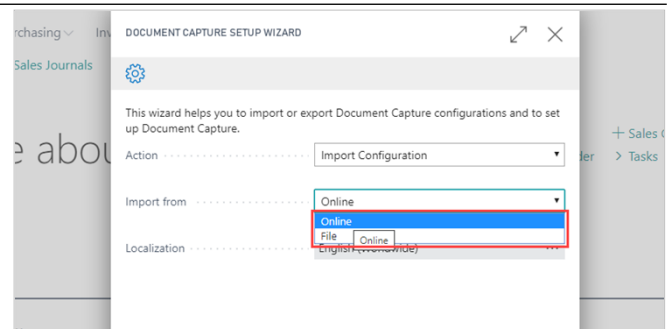
The third option, "Set up Company" is used, when you want to review an existing setup, and be guided through the basic setup areas of the solution.

Select from the field "Import from" where you want to import the configuration.

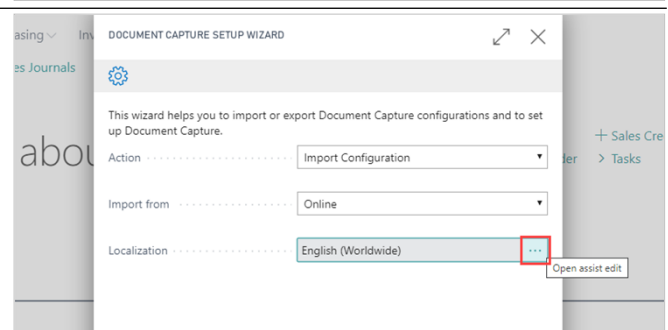


By choosing the action **"Online"**, the wizard will smoothly apply the default configuration from Continia Online.

In case you want to import a backup or configuration from another company, choose the "File" option. This enables you to select your own configuration file.



The last item on the page is the choice of localization. Select **"Open assist edit"** to view the list of localizations available.



Choose the desired localization.

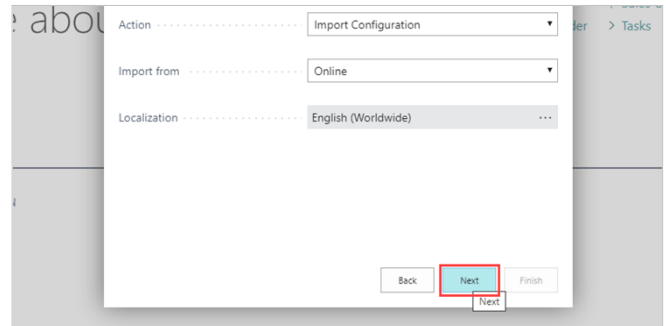
In this scenario, the **"English (Worldwide)"** is the preferred localization.



Select **"Next"** to continue the wizard.

The content of the setup file is shown. By default, the full content of the setup is automatically chosen to be installed.

In cases where parts of the configuration file are to left out, you can exclude a configuration by unticking "Include".



Select **Next** to continue the wizard.

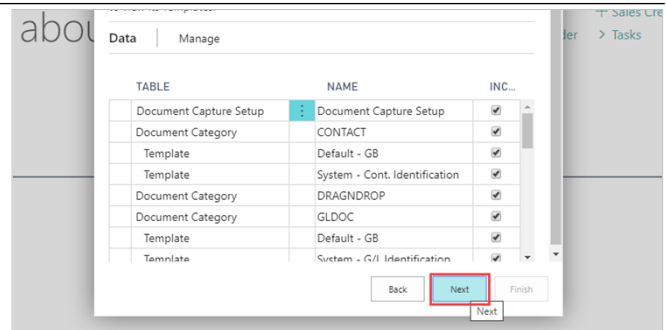
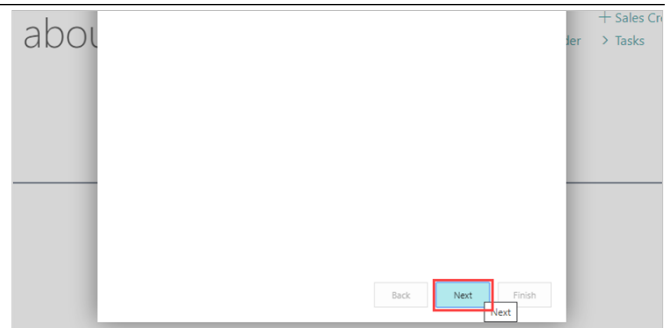
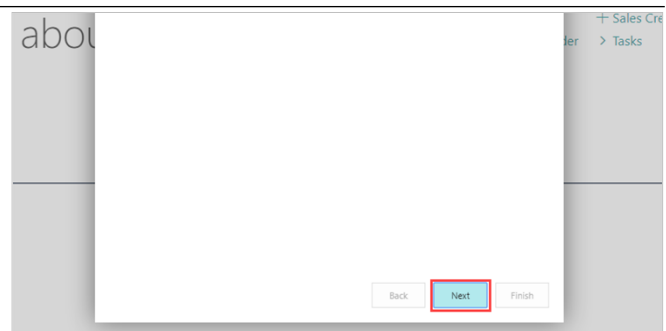


TABLE	NAME	INC...
Document Capture Setup	Document Capture Setup	<input checked="" type="checkbox"/>
Document Category	CONTACT	<input checked="" type="checkbox"/>
Template	Default - GB	<input checked="" type="checkbox"/>
Template	System - Cont. Identification	<input checked="" type="checkbox"/>
Document Category	DRAGNDROP	<input checked="" type="checkbox"/>
Document Category	GLDOC	<input checked="" type="checkbox"/>
Template	Default - GB	<input checked="" type="checkbox"/>
Template	System - G/L Identification	<input checked="" type="checkbox"/>

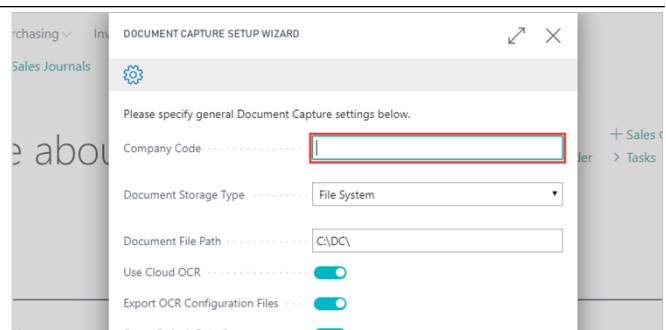
The import of the configuration is confirmed. Select **"Next"** to continue the wizard.



The Document Capture Wizard helps you set up key configuration parameters. Select **"Next"** to continue the wizard.



The "Company Code" is used by Document Capture to separate the companies' document files in the file system, and to separate companies when using the Continia Web approval portal. This allows you to configure similar document categories to multiple companies, as different company codes will indicate to which company, a document imported belongs in the file system. Document Capture also uses the code as part of the e-mail address, when using Continia Cloud OCR. Select the field **"Company Code"**.



DOCUMENT CAPTURE SETUP WIZARD

Please specify general Document Capture settings below.

Company Code

Document Storage Type

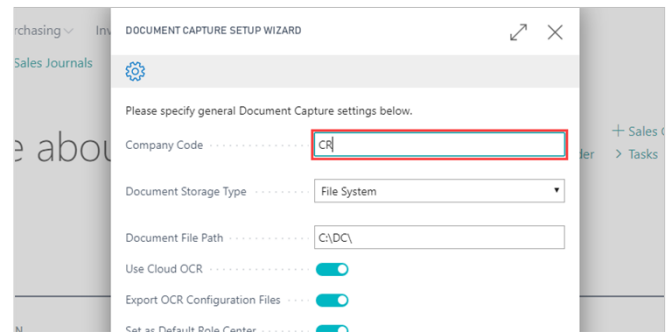
Document File Path

Use Cloud OCR ☒

Export OCR Configuration Files ☒

Set as Default Role Center ☒

Enter a suitable code.
In this session the code "**CRONUSCS**" is used.



DOCUMENT CAPTURE SETUP WIZARD

Please specify general Document Capture settings below.

Company Code CR

Document Storage Type File System

Document File Path C:\DC\

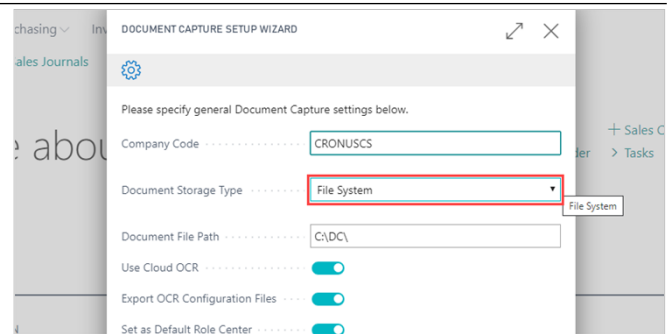
Use Cloud OCR ☐

Export OCR Configuration Files ☐

Set as Default Role Center ☐

The next step is to select either to store the document files in the file system or in the Business Central database.

Open the list of storage choices by selecting the dropdown in the field "**Document Storage Type**".



DOCUMENT CAPTURE SETUP WIZARD

Please specify general Document Capture settings below.

Company Code CRONUSCS

Document Storage Type File System

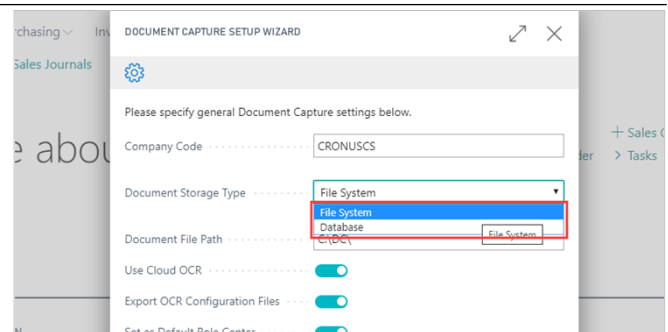
Document File Path C:\DC\

Use Cloud OCR ☐

Export OCR Configuration Files ☐

Set as Default Role Center ☐

In this session, the "**File System**" is the preferred storage type.



DOCUMENT CAPTURE SETUP WIZARD

Please specify general Document Capture settings below.

Company Code CRONUSCS

Document Storage Type File System

Document File Path C:\DC\

Use Cloud OCR ☐

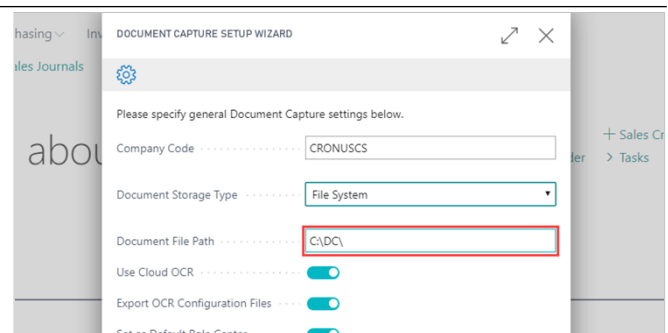
Export OCR Configuration Files ☐

Set as Default Role Center ☐

When choosing the Document Storage Type "**File System**", the root directory path for scanned, waiting, processed and archived files are entered here.

The file path is to be viewed from the Business Central Service perspective. It is important that the service tier account has read/write/delete access to the folder and subfolders, as it is the service tier that accesses the folders.

In cases where the file location is placed on another server that the Business Central service tier, it is recommended to fill in the root folder location as a UNC-path.



DOCUMENT CAPTURE SETUP WIZARD

Please specify general Document Capture settings below.

Company Code CRONUSCS

Document Storage Type File System

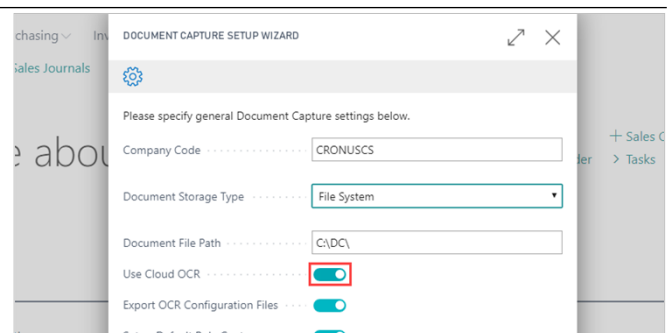
Document File Path C:\DC\

Use Cloud OCR ☐

Export OCR Configuration Files ☐

Set as Default Role Center ☐

Enable "**Use Cloud OCR**" if you will be using the Continia Cloud OCR. By using the Continia Cloud OCR, you do not need to install neither a Document Capture service nor an ABBYY service.



DOCUMENT CAPTURE SETUP WIZARD

Please specify general Document Capture settings below.

Company Code CRONUSCS

Document Storage Type File System

Document File Path C:\DC\

Use Cloud OCR ☒

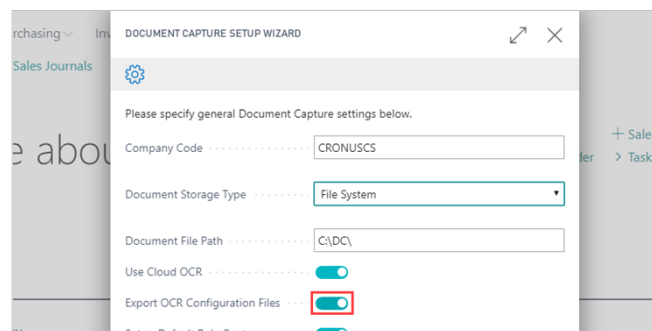
Export OCR Configuration Files ☐

Set as Default Role Center ☐

The OCR Configuration Files contains the parameters, that control the behavior of the OCR Service. If needed, these parameters can be configured on the document categories.

When using OCR On-Premises, files used by the Document Capture Service will be exported to the PDF folder of the Document File Path.

Enable **"Export OCR Configuration Files"** to have the OCR parameters exported to the OCR service when continuing the wizard.



DOCUMENT CAPTURE SETUP WIZARD

Please specify general Document Capture settings below.

Company Code CRONUSCS

Document Storage Type File System

Document File Path C:\DC\

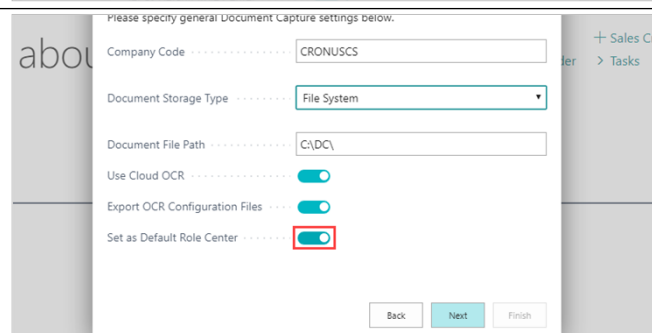
Use Cloud OCR ☐

Export OCR Configuration Files ☒

Set as Default Role Center ☐

Back Next Finish

Enable **"Set as Default Role Center"** to have the Document Capture Role Center configured as the default role center in this Business Central installation. When implementing Document Capture in a test environment the setting is by default enabled. In a production environment, the Role Center switch is by default disabled.



DOCUMENT CAPTURE SETUP WIZARD

Please specify general Document Capture settings below.

Company Code CRONUSCS

Document Storage Type File System

Document File Path C:\DC\

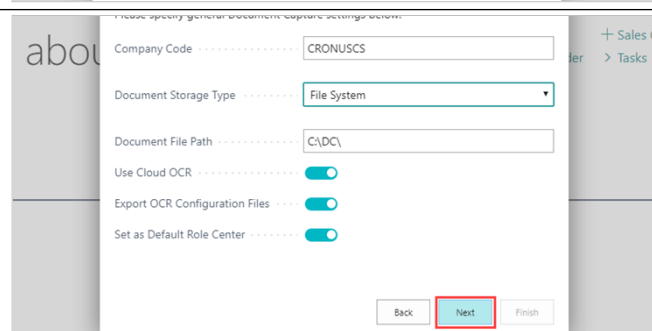
Use Cloud OCR ☐

Export OCR Configuration Files ☐

Set as Default Role Center ☒

Back Next Finish

Select **"Next"** to continue the wizard.



DOCUMENT CAPTURE SETUP WIZARD

Please specify general Document Capture settings below.

Company Code CRONUSCS

Document Storage Type File System

Document File Path C:\DC\

Use Cloud OCR ☐

Export OCR Configuration Files ☐

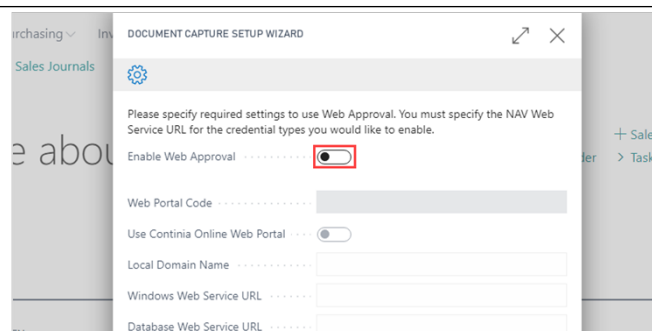
Set as Default Role Center ☐

Back Next Finish

The final step in the wizard concerns the Continia Web Approval Portal. When approving documents, you can use the streamlined approval portal to handle any document type. The Continia Web Approval Portal is available either as services in the cloud, or as an On-Premises installation.

"Enable Web Approval" allows you to use either the on-premises Continia Web Approval Portal included in the installation package, or the cloud Web Approval Portal provided by Continia Online.

When enabling the web approval, the Document Capture Setup Wizard fills in values in all the fields below based on the current installation. These settings are changeable if needed.



DOCUMENT CAPTURE SETUP WIZARD

Please specify required settings to use Web Approval. You must specify the NAV Web Service URL for the credential types you would like to enable.

Enable Web Approval ☒

Web Portal Code

Use Continia Online Web Portal ☐

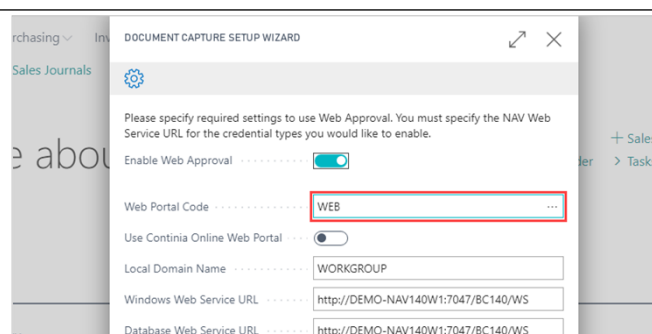
Local Domain Name

Windows Web Service URL

Database Web Service URL

The **"Web Portal Code"** is the name of the record in the Web table, that holds the configuration for the web approval portal.

You can either select an existing web portal or create a new one. The wizard automatically creates the web portal with the given code, if it does not already exist.



DOCUMENT CAPTURE SETUP WIZARD

Please specify required settings to use Web Approval. You must specify the NAV Web Service URL for the credential types you would like to enable.

Enable Web Approval ☒

Web Portal Code WEB

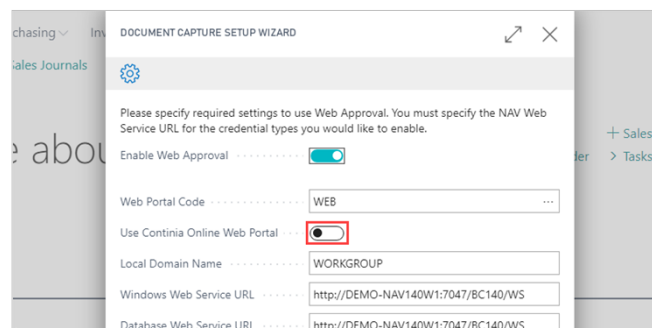
Use Continia Online Web Portal ☐

Local Domain Name WORKGROUP

Windows Web Service URL http://DEMO-NAV140W1:7047/BC140/WS

Database Web Service URL http://DEMO-NAV140W1:7047/BC140/WS

"Use Continia Online Web Portal" toggles whether you wish to use the Continia Online Web approval portal, hosted by Continia Online or an On-Premises website that you must install and maintain on a locally installed webserver



DOCUMENT CAPTURE SETUP WIZARD

Please specify required settings to use Web Approval. You must specify the NAV Web Service URL for the credential types you would like to enable.

Enable Web Approval ☒

Web Portal Code WEB

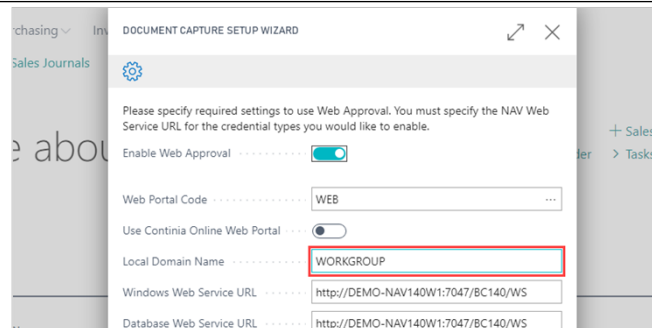
Use Continia Online Web Portal ☒

Local Domain Name WORKGROUP

Windows Web Service URL http://DEMO-NAV140W1:7047/BC140/WS

Database Web Service URL http://DEMO-NAV140W1:7047/BC140/WS

Fill in the "Local Domain Name" under which you have created the Windows users. This is only relevant for NAV versions, that does not include the domain name as part of the user-ID in NAV.



DOCUMENT CAPTURE SETUP WIZARD

Please specify required settings to use Web Approval. You must specify the NAV Web Service URL for the credential types you would like to enable.

Enable Web Approval ☒

Web Portal Code WEB

Use Continia Online Web Portal ☐

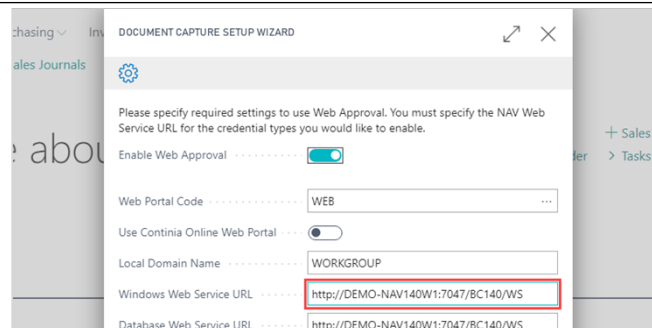
Local Domain Name WORKGROUP

Windows Web Service URL http://DEMO-NAV140W1:7047/BC140/WS

Database Web Service URL http://DEMO-NAV140W1:7047/BC140/WS

The "Windows Web Service URL" is the URL for the Business Central web services, that points to the ServiceTier, which authenticates the users with Windows credentials.

Remember that if all users in Business Central are Windows users you only need to fill out this URL. However, if the users have mixed authentications, you need to set up two different ServiceTiers, and enter the URL for both Windows Web Service and Database Web Service.



DOCUMENT CAPTURE SETUP WIZARD

Please specify required settings to use Web Approval. You must specify the NAV Web Service URL for the credential types you would like to enable.

Enable Web Approval ☒

Web Portal Code WEB

Use Continia Online Web Portal ☐

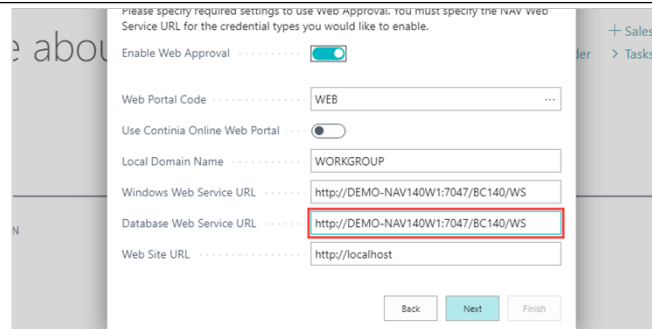
Local Domain Name WORKGROUP

Windows Web Service URL http://DEMO-NAV140W1:7047/BC140/WS

Database Web Service URL http://DEMO-NAV140W1:7047/BC140/WS

The "Database Web Service URL" is the URL for the Business Central web services, that points to the ServiceTier. This authenticates the users with database logins (or NavUserPassword).

If all users in Business Central are database users - you only need to fill out this URL. However, if the users have mixed authentications, you need to set up two different ServiceTiers, and enter the URL for both Windows Web Service and Database Web Service.



DOCUMENT CAPTURE SETUP WIZARD

Please specify required settings to use Web Approval. You must specify the NAV Web Service URL for the credential types you would like to enable.

Enable Web Approval ☒

Web Portal Code WEB

Use Continia Online Web Portal ☐

Local Domain Name WORKGROUP

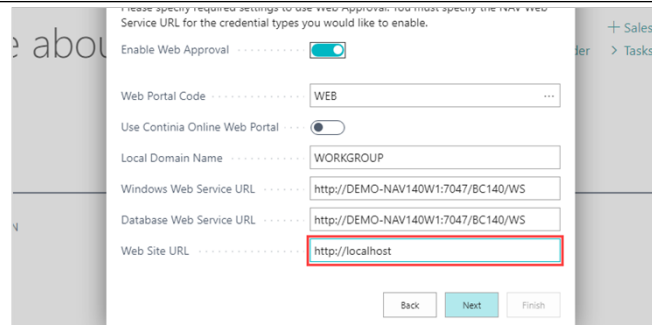
Windows Web Service URL http://DEMO-NAV140W1:7047/BC140/WS

Database Web Service URL http://DEMO-NAV140W1:7047/BC140/WS

Web Site URL http://localhost

Back Next Finish

"Web Site URL" is the URL of the website that you want to use. Document Capture provides the URL automatically if the Continia Online Web Portal was chosen earlier in the wizard.



DOCUMENT CAPTURE SETUP WIZARD

Please specify required settings to use Web Approval. You must specify the NAV Web Service URL for the credential types you would like to enable.

Enable Web Approval ☒

Web Portal Code WEB

Use Continia Online Web Portal ☐

Local Domain Name WORKGROUP

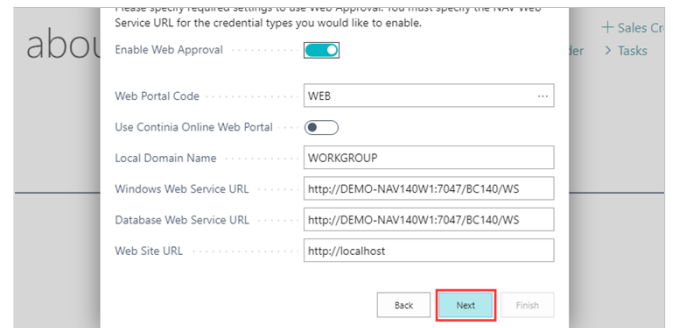
Windows Web Service URL http://DEMO-NAV140W1:7047/BC140/WS

Database Web Service URL http://DEMO-NAV140W1:7047/BC140/WS

Web Site URL http://localhost

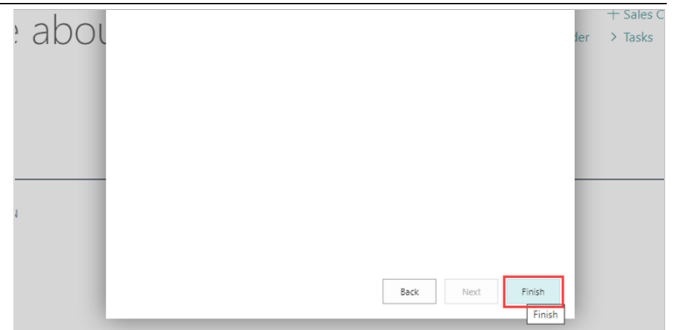
Back Next Finish

Select **"Next"** to continue the wizard.



This screenshot shows the configuration screen of the Document Capture Setup Wizard. At the top, there is a note about enabling Web Approval. Below this, several settings are listed with input fields: 'Web Portal Code' is set to 'WEB'; 'Use Continia Online Web Portal' is a toggle switch that is currently turned off; 'Local Domain Name' is set to 'WORKGROUP'; 'Windows Web Service URL' and 'Database Web Service URL' are both set to 'http://DEMO-NAV140W1:7047/BC140/WS'; and 'Web Site URL' is set to 'http://localhost'. At the bottom right of the configuration area, there are three buttons: 'Back', 'Next', and 'Finish'. The 'Next' button is highlighted with a red rectangular box.

The setup of Document Capture is completed, and you are ready to start using the solution. Select **"Finish"** to close the wizard.



This screenshot shows the completion screen of the Document Capture Setup Wizard. The main area of the window is empty, indicating that the configuration process is finished. At the bottom right, there are three buttons: 'Back', 'Next', and 'Finish'. The 'Finish' button is highlighted with a red rectangular box.