# Dynamica AI Document Processing

User Guide

Installation Steps

Prerequisites

- Ensure you have a valid Dynamics 365 environment.
- Azure OpenAI service access is required.

User Configuration: Add Security Roles

1. Assign for each user has a security role :
   - Dynamica Document Parse With AI Security Role

2. Ensure the Dynamica AI Document Parsing application and Table Parsing Configuration are available
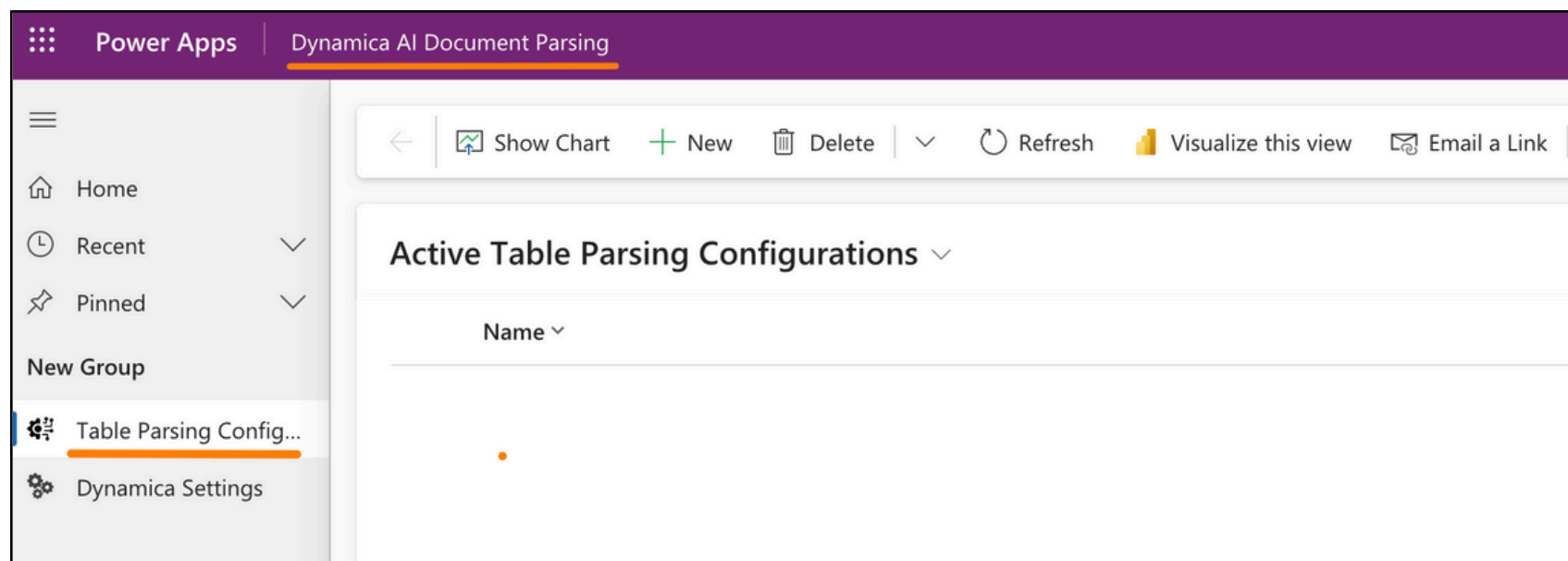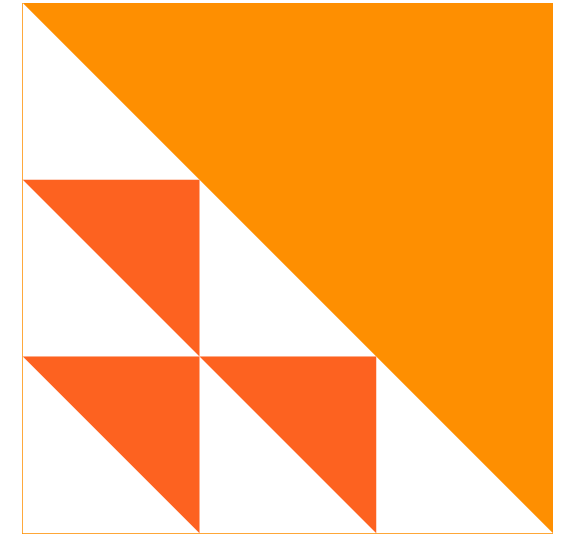
Installation Steps

Dynamica LABS

Set Up Azure OpenAI Keys

- Navigate to the Table Parsing Configuration table.
- Click New to create a configuration record.
- Create new Azure Open AI service if you don't have one.
- Open the Azure OpenAI service and copy Endpoint and Key1.
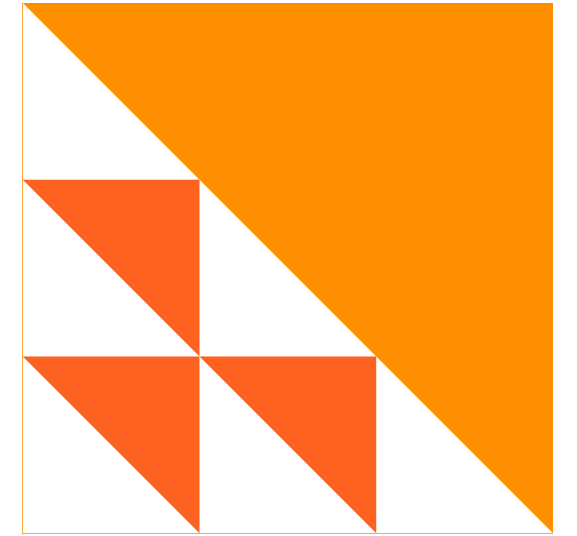
Installation Steps

Configure the Dynamica Settings Table
on the Dynamica AI Document Parsing MDA

In Dynamics 365, create two records in the Dynamica Settings table:
- Name – OpenAIEndpoint, Encrypt – Yes, Value – Endpoint from the Azure Open AI service
- Name – OpenAIApiKey, Encrypt – Yes, Value – Key1 from the Azure Open AI service

OpenAIEndpoint - Saved
Dynamica Settings

General   Related ⌄

Name	*	OpenAIEndpoint
Value	*	
Description		---

OpenAIApiKey - Saved
Dynamica Settings

General   Related ⌄

Name	*	OpenAIApiKey
Value	*	
Description		---

Usage

Set Up Table Parsing Configuration

- Navigate to the Table Parsing Configuration table.
- Click New to create a configuration record.
- Define the following fields:
  - Entity: The table where parsed data will be stored.
  - Columns: The attributes to extract from PDF documents.
  - Field Descriptions (Prompts): Write short descriptions to help Azure OpenAI understand each attribute.
  - Use the Generate Prompts feature to automatically create field descriptions using Azure OpenAI.
  - Review and edit generated prompts as needed.
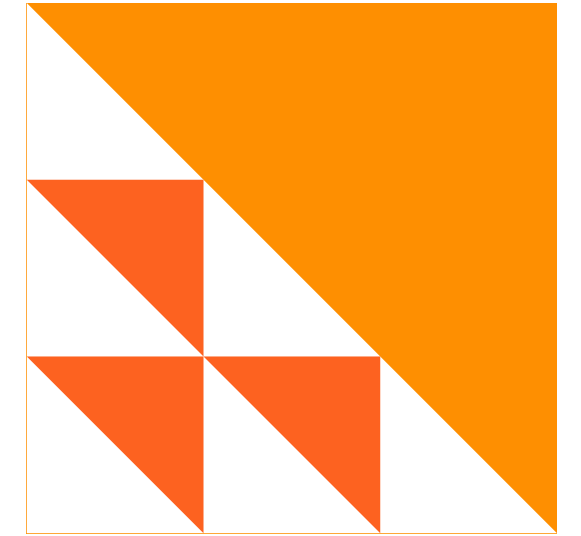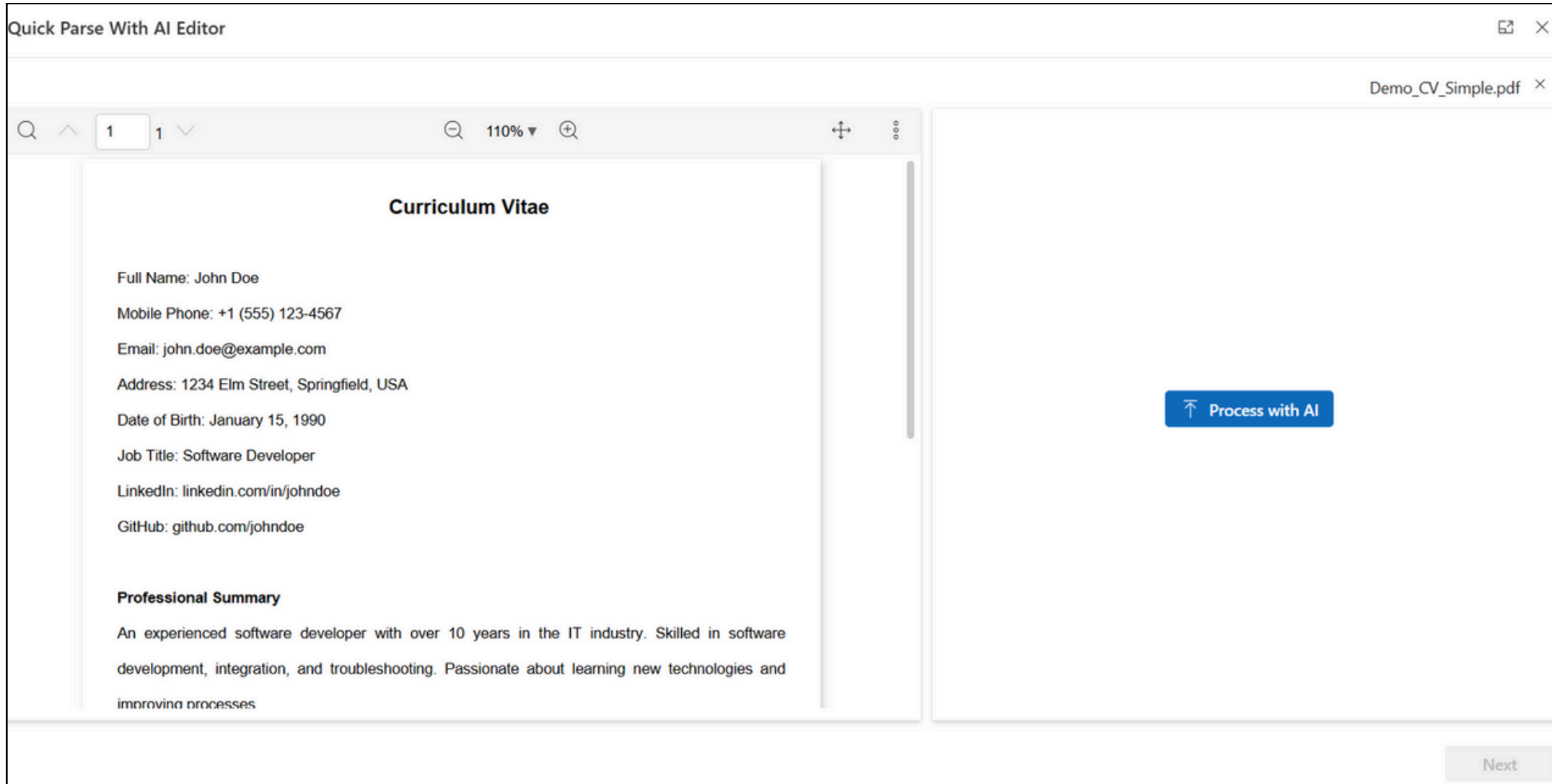 - Save your configuration

Usage

Start Parsing documents

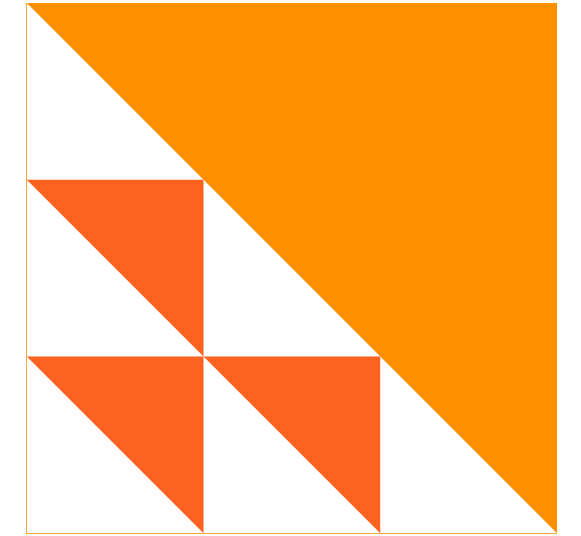- Click Quick Parse with AI on the ribbon
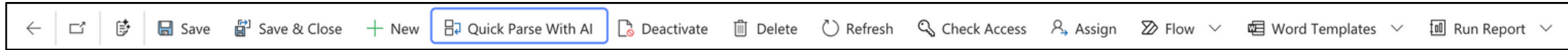
- Select the file for processing
- Click Process with AI

Usage

Validate Parsed Results

- Click "Next" to validate results
- Use the Designer View to manually edit field values.
- Click Create to save the record
- Go to the target table configured in Table Parsing Configuration
- Verify the record created for the uploaded PDF

Quick Parse With AI Editor

Demo_CV_Simple.pdf ✕

Curriculum Vitae

Full Name: John Doe

Mobile Phone: +1 (555) 123-4567

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Address: 1234 Elm Street, Springfield, USA

Date of Birth: January 15, 1990

Job Title: Software Developer

LinkedIn: linkedin.com/in/johndoe

GitHub: github.com/johndoe

Professional Summary

An experienced software developer with over 10 years in the IT industry. Sk
development, integration, and troubleshooting. Passionate about learning new

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Address 1: City	Springfield	Springfield
Address 1: County		|---
Birthday	1/15/1990	1/15/1990
Job Title	Software Developer	Software Developer

Create

Tips and Best Practices
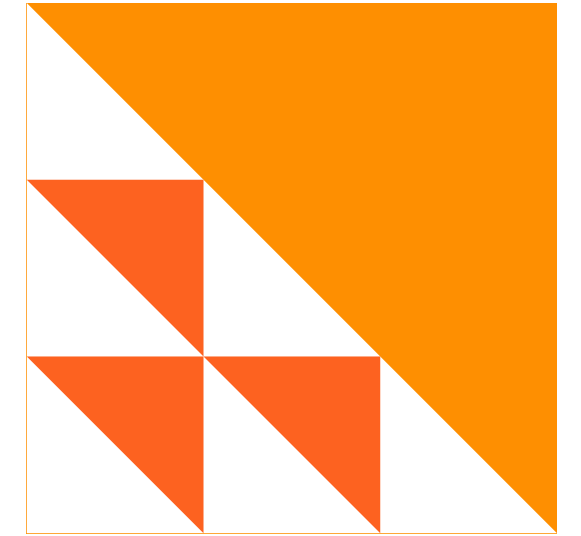
Best practises

- Refine Prompts: Provide clear and concise descriptions for each field to improve AI accuracy.
- Validate Results: Always review parsed data to ensure correctness.
- Leverage AI Features: Use automatic prompt generation to save time and enhance efficiency..
- Collaborate: Share configuration settings with your team to maintain consistency across documents.