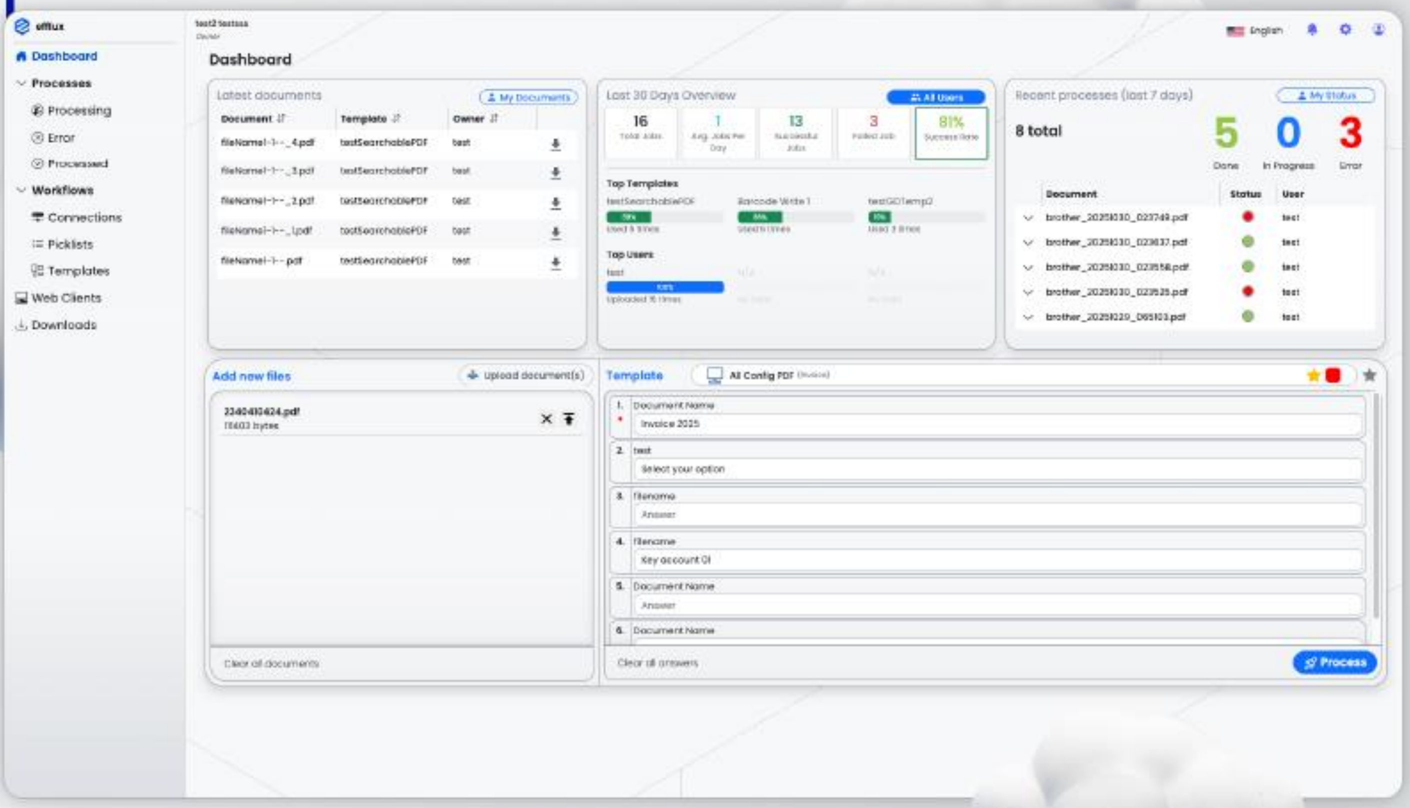
User Manual

Efflux Cloud Capture |



efflux-solutions.com

Contents

1. Introduction

Welcome to Efflux Cloud Capture

Efflux Cloud Capture is a powerful, cloud-based document processing system designed to streamline how your organization captures, extracts, and manages data from documents. Whether you're handling invoices, forms, contracts, or unstructured files, Efflux automates and simplifies the entire document lifecycle — from upload to integration.

This user manual provides a comprehensive guide to help you navigate and utilize Efflux Cloud Capture efficiently. Whether you're a first-time user or an experienced operator, this manual covers the key features, setup instructions, and best practices for optimal performance.

Key Benefits:
- Cloud-based access — no local installations required
- Intelligent data extraction using AI/ML
- Seamless integration with third-party systems
- Scalable and secure architecture
- Intuitive, user-friendly interface

2. Azure Entra Integration Overview

Efflux Cloud Capture (ECC) supports integration with Azure Entra (formerly Azure Active Directory). This feature allows an organization owner to:

- Connect their Azure Entra tenant to ECC.
- Import Azure users and user groups directly into ECC.
- Allow imported users to log in using their Azure accounts.

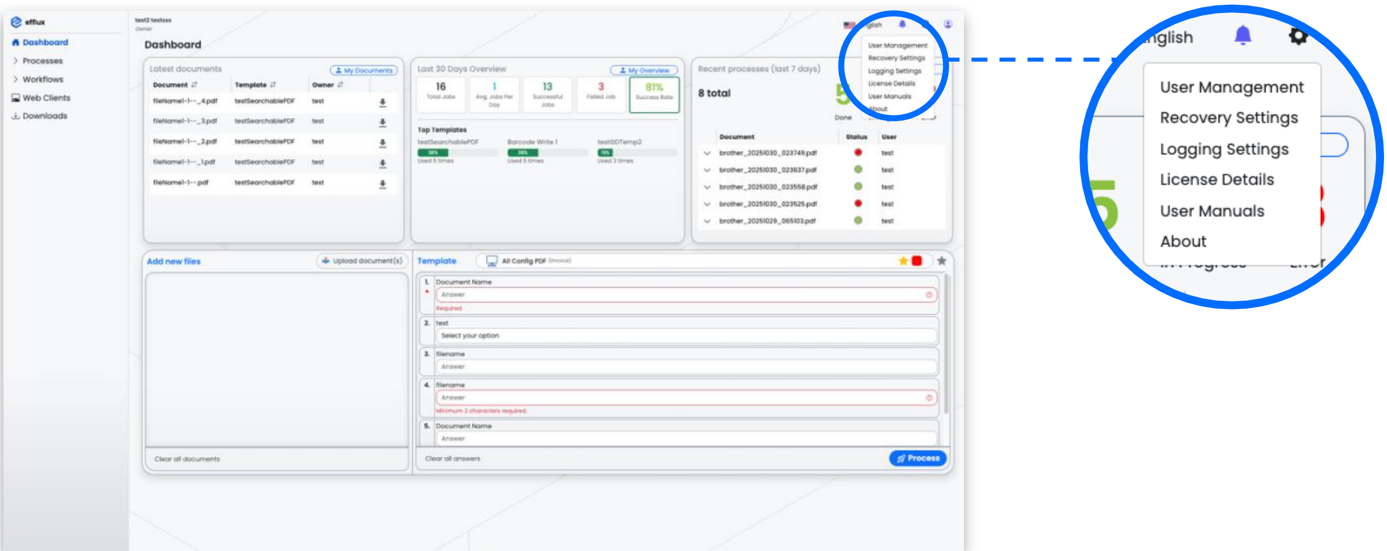
Once connected, user management becomes easier and more secure through centralized identity control.

2.1 How to Connect Azure Entra to ECC

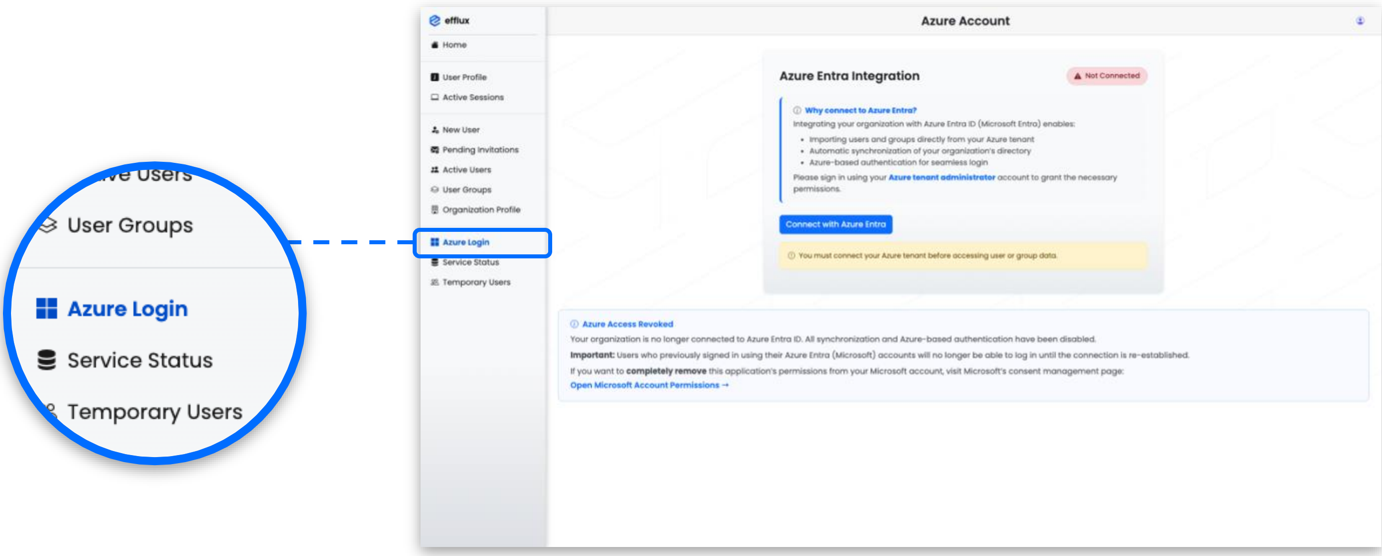
Prerequisites:

- You must be logged in as an **Organization Owner**
- You must authenticate using an **Azure Admin** account

Steps:



1. In ECC, navigate to:
   User Management → Azure Login



2. Click on **Connect with Azure Entra**.
3. A Microsoft login prompt will appear. Sign in with your **Azure Admin** account.
4. After successful authentication, ECC will connect to your organization's Azure tenant.

Confirmation:

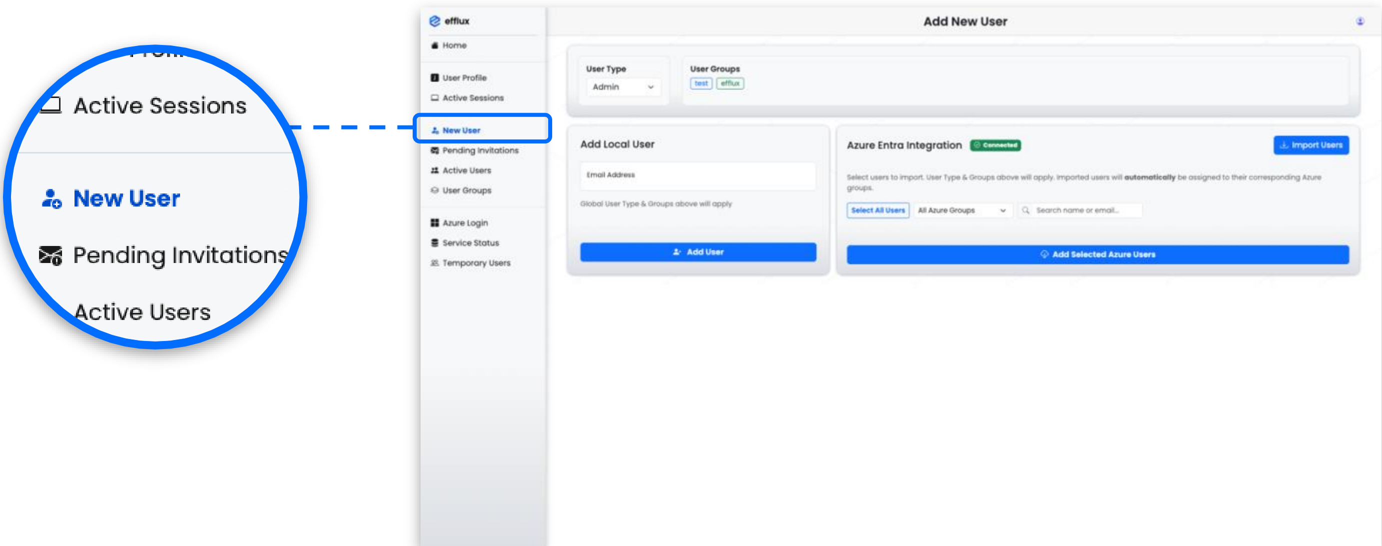
- You will see the message:
  "Connected to the tenant"

If you do not see this message, verify your Azure credentials and try again.

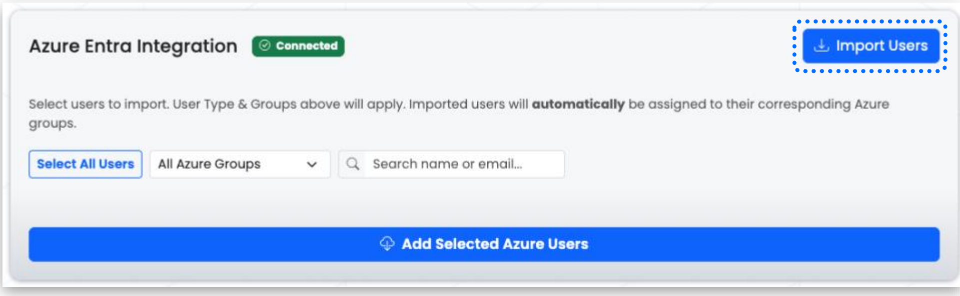
2.2 How to Import Users from Azure Entra

Once Azure Entra is connected, you can import users into ECC.

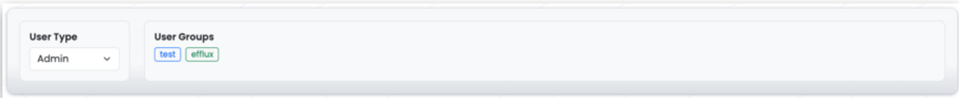
Steps:



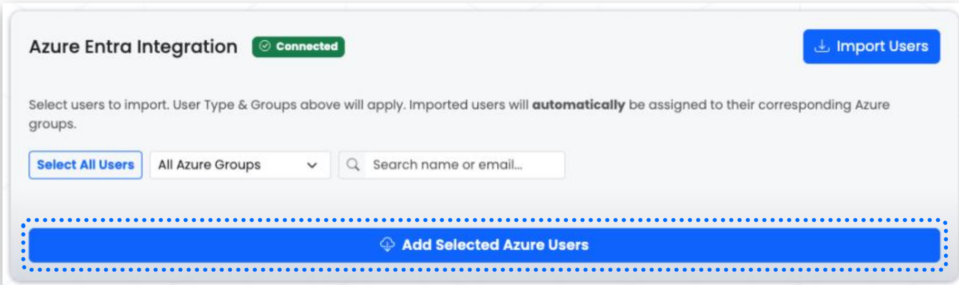
1. Navigate to:
   User Management → New User.



2. On the right panel, click **Import Users**.
3. A list of Azure users who are not yet imported into ECC will appear.
   - Their associated Azure user groups will be shown as well.
4. Select one or more users to import.



5. At the top panel:
   - Choose the desired **ECC User Type** (e.g., User, Admin, etc.)
   - Select the **ECC groups** you wish to assign to the selected users.



6. Click **Add Selected Azure Users**.

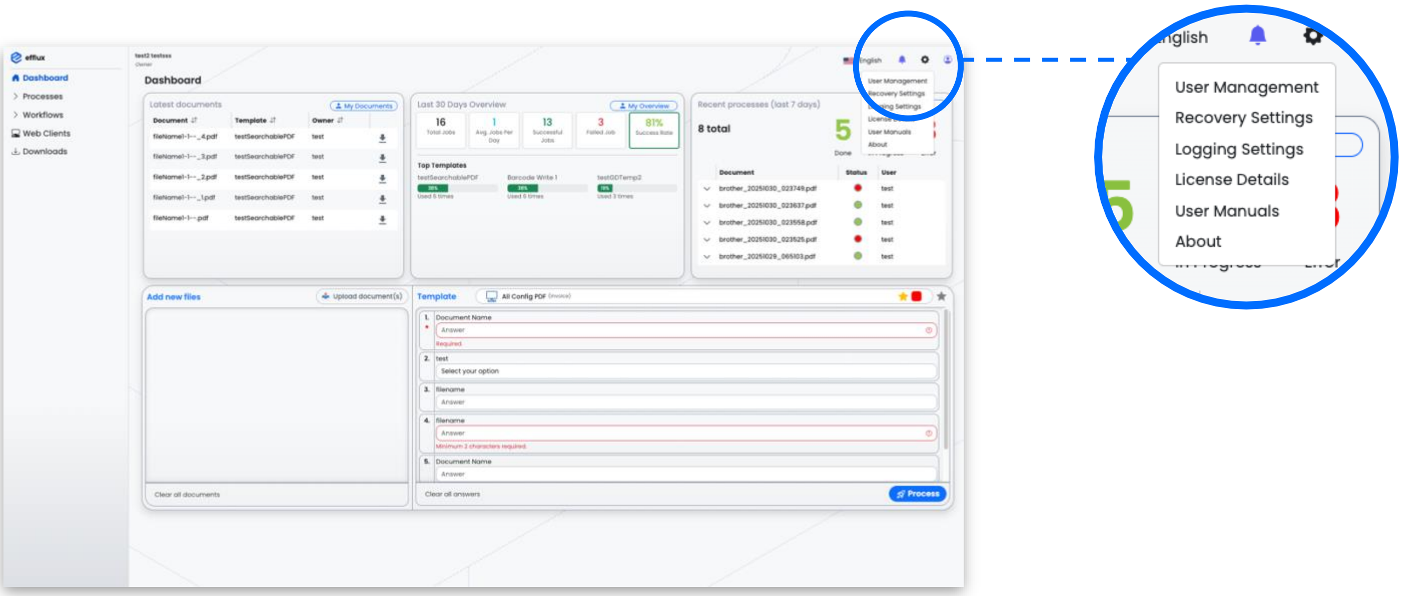
Result:

- The selected users will be added to ECC.
- They will automatically receive a **welcome email** with instructions.
- They can log in using their **Azure credentials**.

3. Local User Management

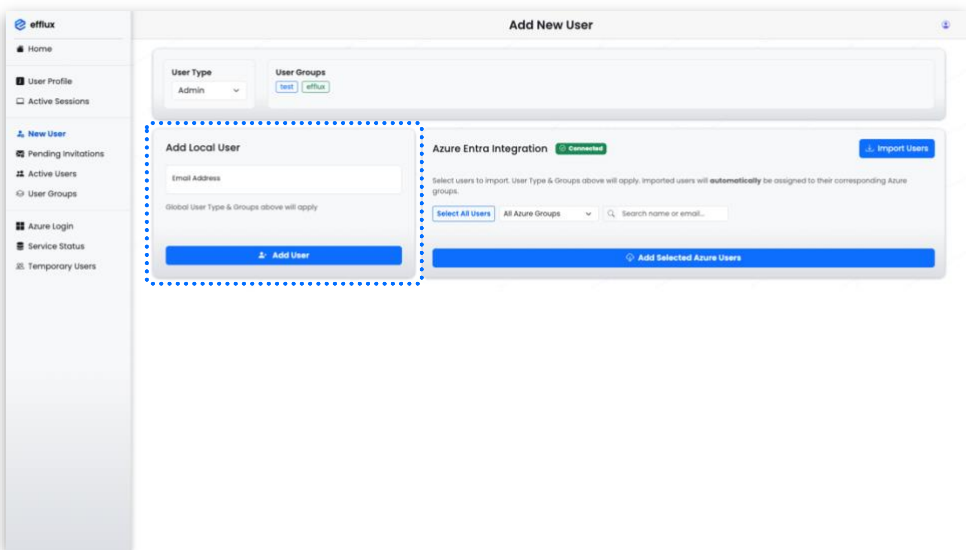
Organization owners can manage users within their Efflux Cloud Capture instance by navigating to:

Top Menu → Settings → User Management



This section allows the owner to invite, monitor, and manage all users associated with the organization.

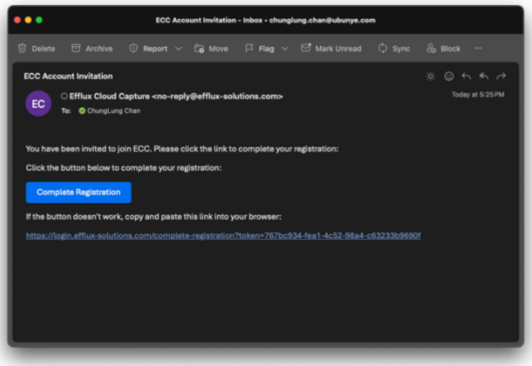
3.1 Add New Local User



1. Select the **user type**:
   - **Admin**: Has full access, including user management and system settings.
   - **User**: Has access to standard document processing features.

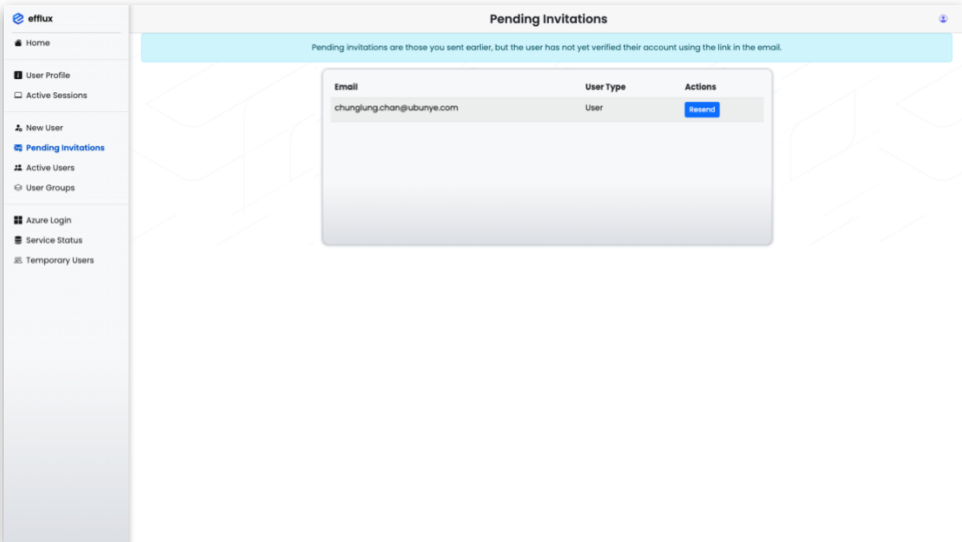
2. Assign user group(s)
3. Enter the user's **email address**.
4. Click **"Add User"**.

Once submitted, the invited user will receive an email with a registration link.



By following the link, the user can fill in their details and complete the setup. After successful registration, they can log in to the platform.

3.2 Pending Invitations

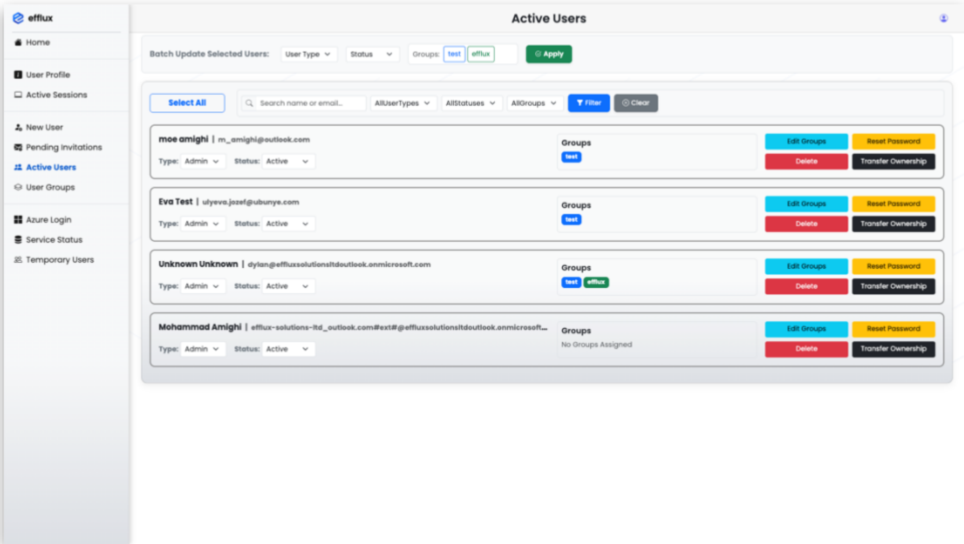


This tab displays all users who have been invited but have **not yet completed** their registration.

For each pending invitation, the organization owner can:

- View the invitation status
- **Resend the invitation email** if necessary

3.3 Active Users



The **Active Users** tab shows a list of all registered users in the organization. From this list, the owner can:

- **Change user roles** (Admin or User)
- **Activate** and **Deactivate** a user's account
- **Assign/Edit User Group(s)**
- **Reset passwords** for user(s)
- **Delete** user(s)
- **Transfer ownership(s)**
- **Perform batch update the User Type, Status and User Group(s)** of selected users

Note: Deactivated users will no longer be able to log in or access the platform until reactivated.

4. Roles and Permissions

Efflux Cloud Capture provides three user roles, each with specific access levels and responsibilities:

- **User**
- **Admin**
- **Owner**

Below is a detailed breakdown of permissions for each role.

4.1 User

Users have access to core document upload and tracking features, limited to their own data.

Section	Access
Home Page	Can access the **Upload** section, but only see templates with *"Access All Users"* enabled
User Profile	Full access to their own profile
Document Status	Can view the status of **documents they uploaded** only
Download	Can download **only their own processed documents**

4.2 Admin

Admins have extended access for managing data and configuration settings, along with broader visibility.

Section	Access
All User Permissions	Inherits all permissions from the **User** role
Document Status	Can view the status of **all documents** uploaded across the organization
Download	Can download **all processed documents**
Templates	Full access to manage document templates
Connection	Can configure system integrations and connections
Picklist	Manage picklists used in templates
Client	Manage client-related configurations

4.3 Owner

The Owner has full administrative rights and is the only role with access to user management features.

Section	Access
All Admin Permissions	Inherits all permissions from the **Admin** role
User Management	Full access to invite, modify, deactivate, and manage all organization users

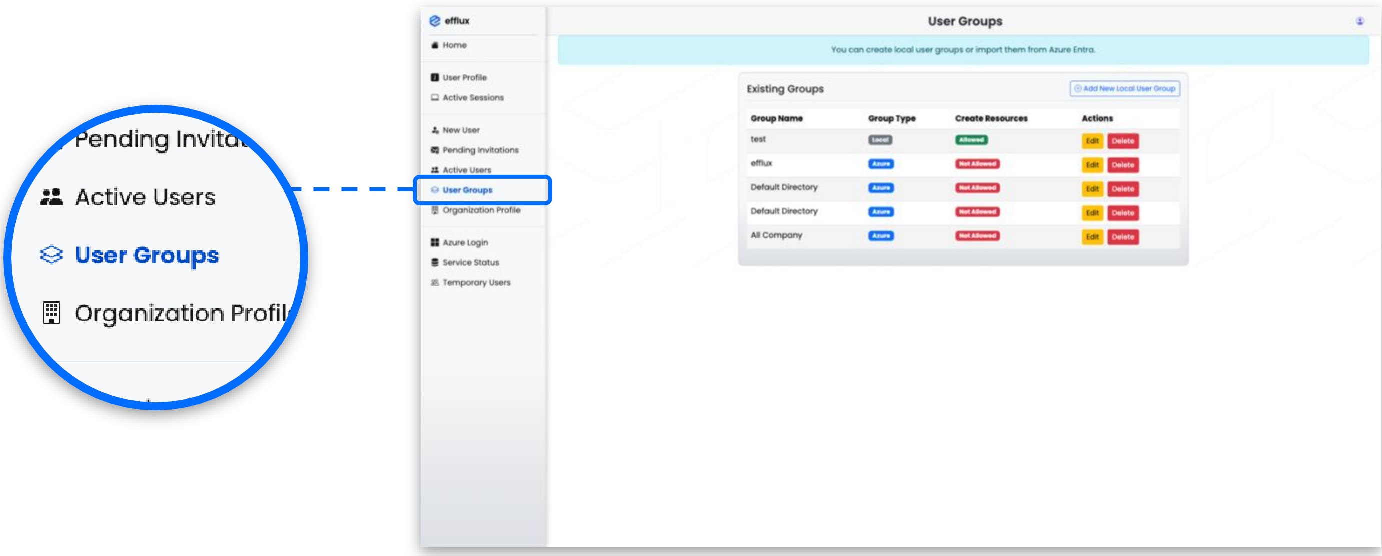
5. User Groups Management

Efflux Cloud Capture (ECC) supports the use of User Groups to simplify permission management and assign capabilities to multiple users at once. Organization Owners can create, edit, or delete user groups based on their operational needs.

5.1 Accessing User Groups

To manage user groups:

1. In ECC, navigate to:
   User Management → User Groups



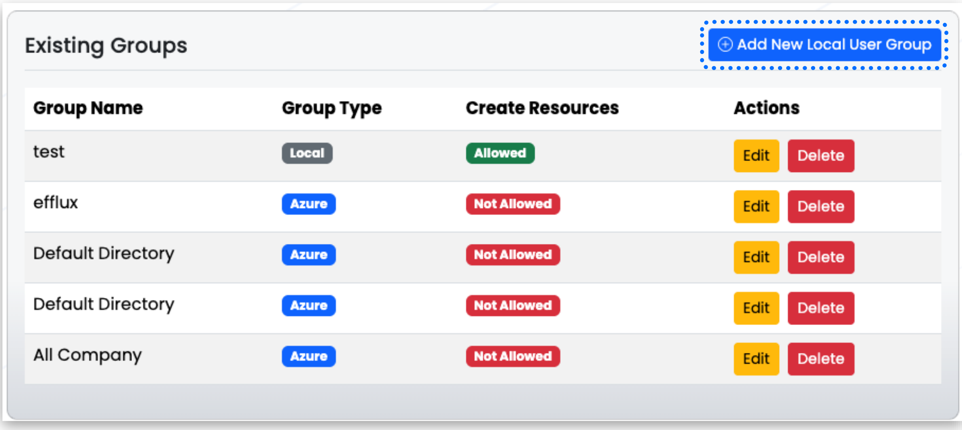
2. The page will display a list of all existing user groups on the left panel.

From here, you can:

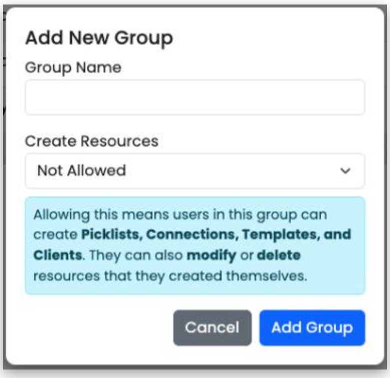
- View existing groups
- Edit a selected group
- Delete a group
- Create a new group

5.2 Creating a New User Group

To create a new user group:



1. From the **User Groups** screen, click **Add New Group** (or similar button provided).

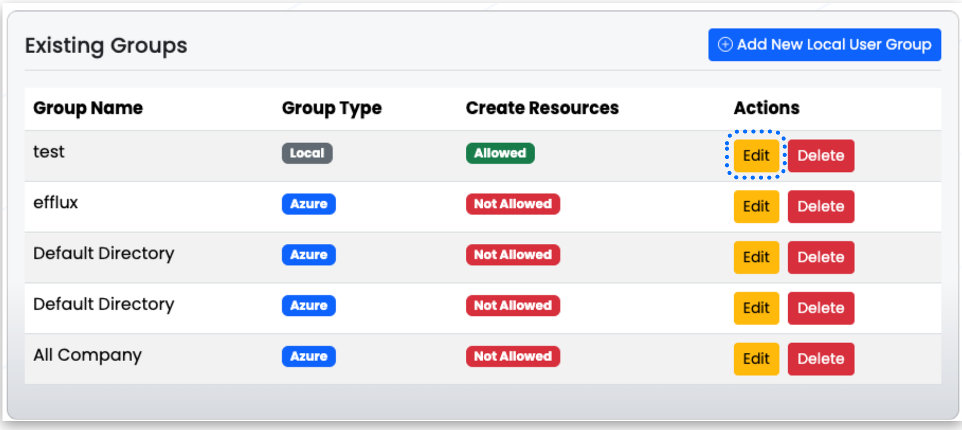


2. Enter the group name.
3. (Optional) Enable Create Resources permissions.
4. Save your changes.

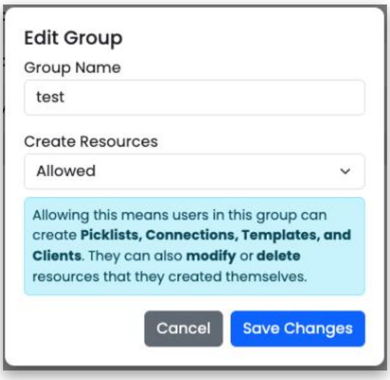
The new group will appear in the list immediately and can be assigned to users.

5.3 Editing an Existing User Group

To modify an existing group:



1. Select a group from the list.

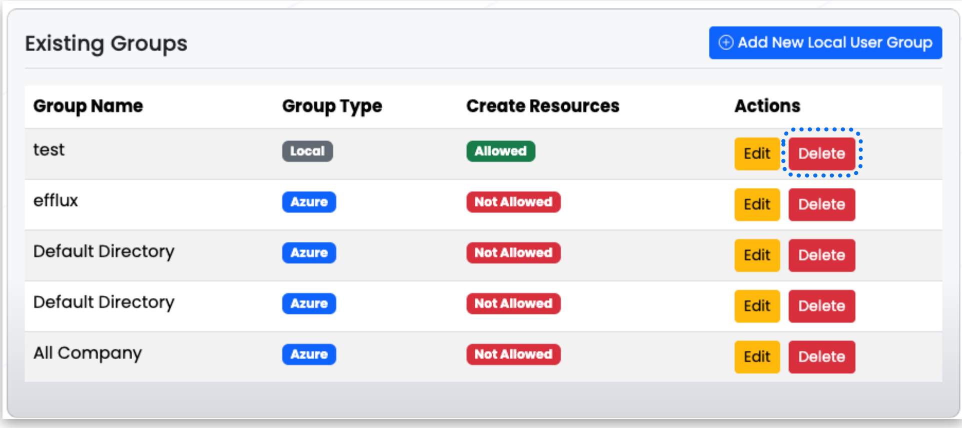


2. Adjust the following options:
   - **Group Name**
   - **Create Resources** permission
3. Save changes.

Any modifications will apply automatically to all users assigned to that group.

5.4 Deleting a User Group

To remove a group:



1. Select the group you wish to delete.
2. Click Delete.
3. Confirm the deletion.

⚠ **Note:** Users who were assigned to a deleted group will no longer inherit that group's permissions. Ensure users are reassigned to valid groups when necessary.

5.5 Create Resources Permission

Each user group includes a configurable option called:
"Create Resources"

When enabled, users belonging to this group gain the ability to create:

- Templates
- Connections
- Picklists
- Clients

This permission allows users to manage operational components essential for ECC workflows.

Users who do not have the Create Resources permission will be unable to create Templates, Picklists, Connections, or Clients. If a user belongs to at least one user group with this permission enabled, the user will be able to create resources regardless of permissions assigned in their other groups. The Admin user has full Create Resources permissions by default.

Use Cases:

- Delegating configuration tasks to power users.
- Allowing development teams to create test configurations.
- Empowering department admins to manage their own resources.

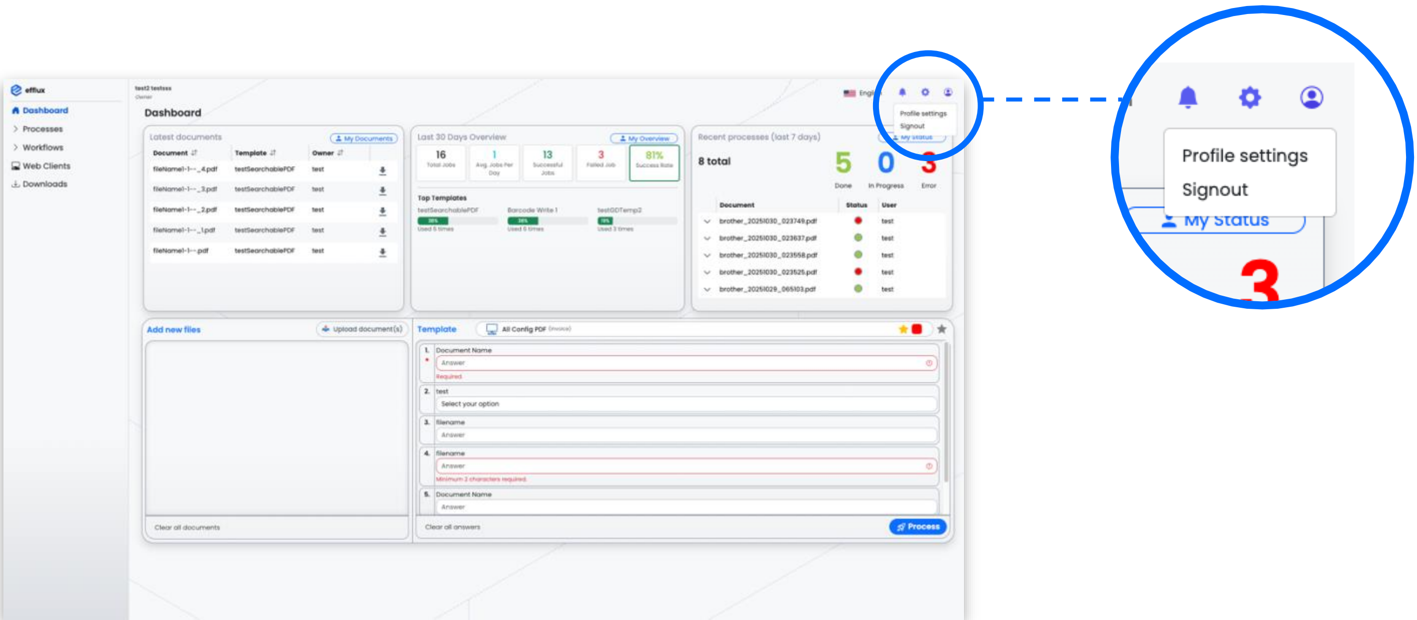
6. User Profile

All users can view and manage their personal profile settings from within the Efflux Cloud Capture platform.

Accessing Your Profile

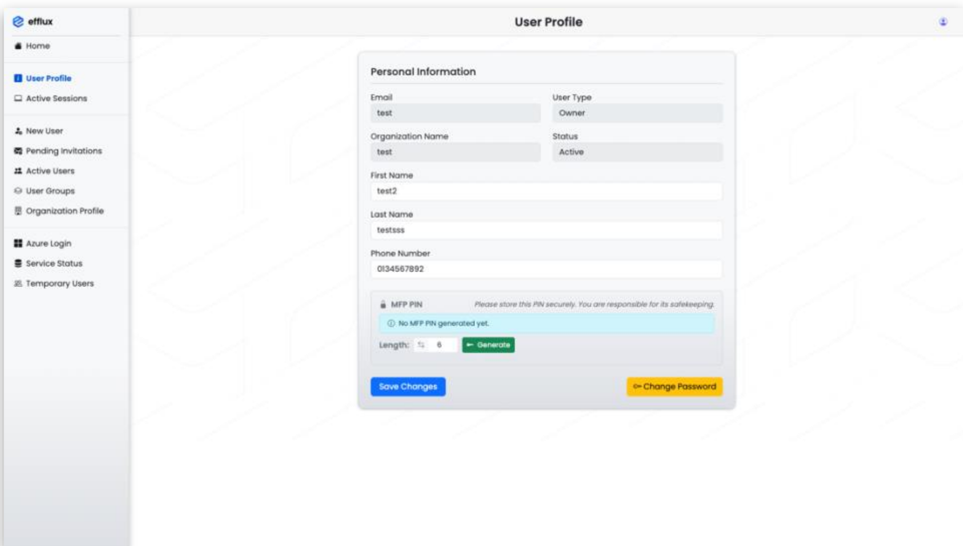
To access your profile:

1. Navigate to the **top menu**.
2. Click on **User → User Profile**.



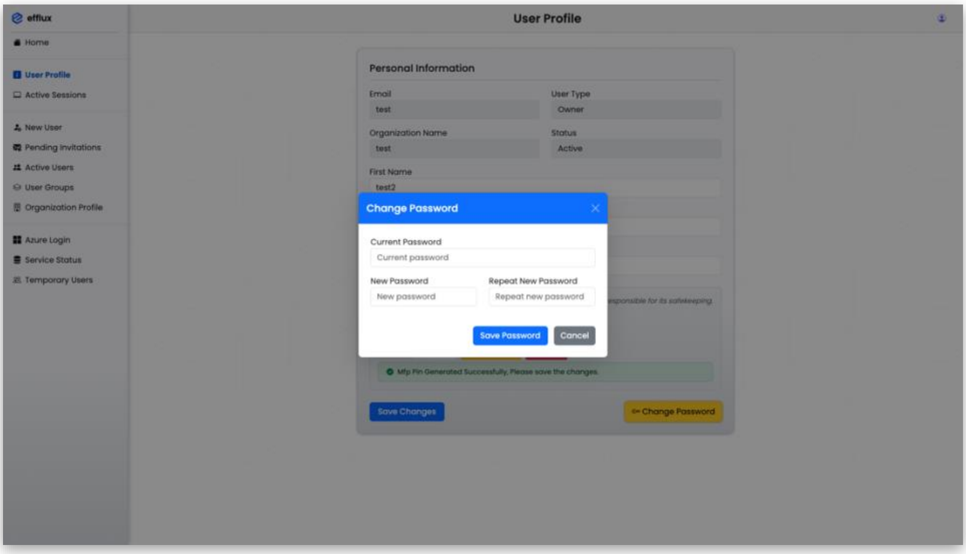
Profile Management Options

Within the **User Profile** section, users can:



- **View and edit personal details**, including:

- First Name
- Last Name
- Phone Number



- **Change Password**:
  - Enter the current password
  - Enter and confirm a new password

Note: Your email address cannot be changed from the profile page. Please contact the ECC support team for email updates.

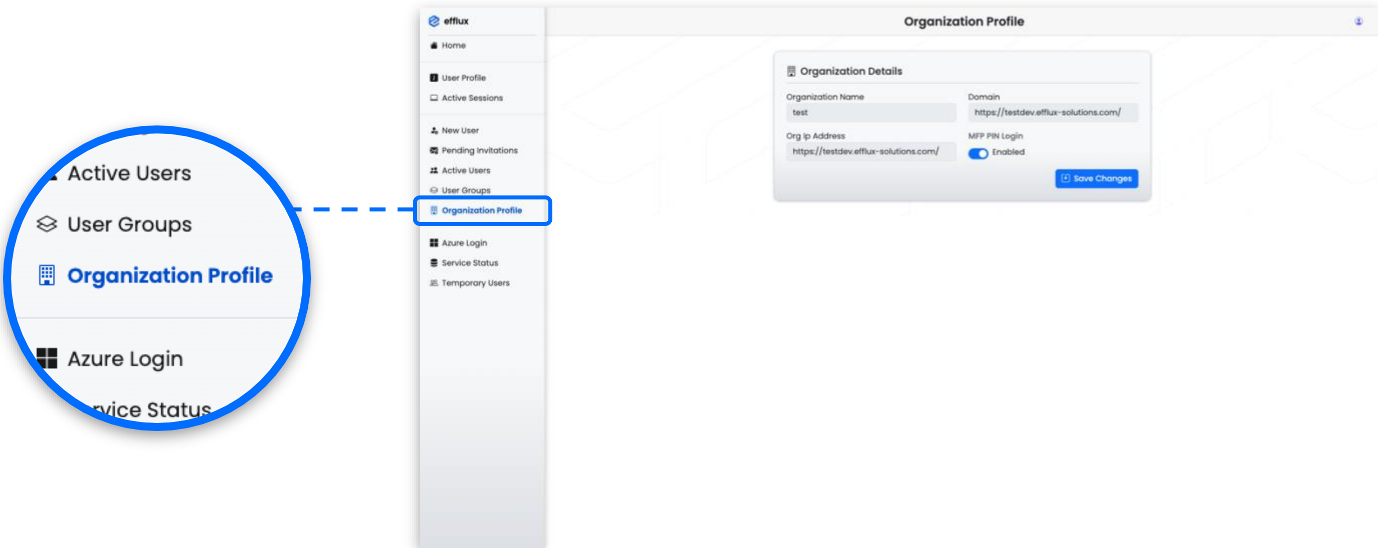
7. MFP PIN Login

The MFP PIN Login feature allows users to securely access multifunction printers (MFPs) using a personal identification number (PIN) instead of their username and password. This simplifies authentication on shared devices while maintaining security and traceability.

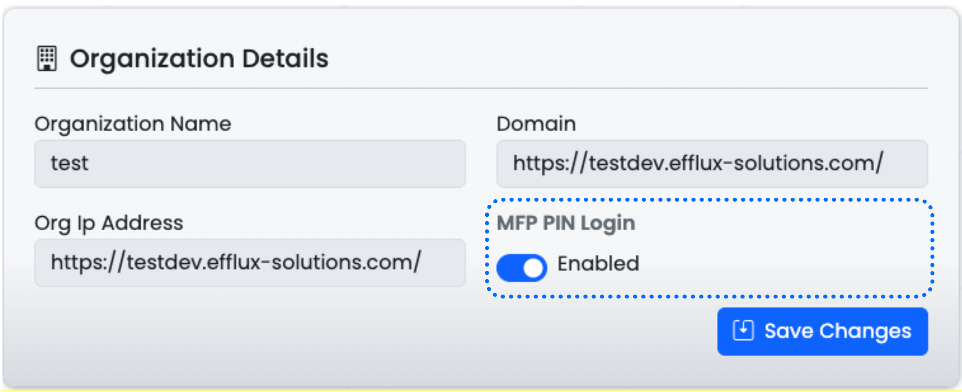
7.1 Enabling MFP PIN Login (Organization Owner)

Only the **Organization Owner** can enable or disable MFP PIN Login.

1. Log in to the **Efflux Cloud Capture** web portal.



2. Navigate to:
   User Management → Organization Profile



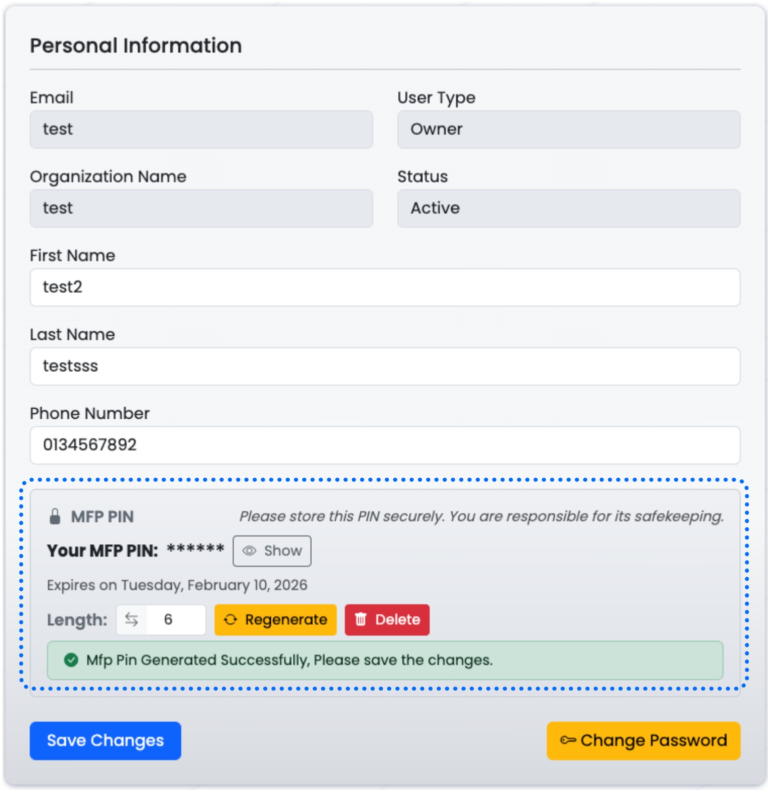
3. Locate the **MFP PIN Login** option.
4. Toggle the option to **Enable**.
5. Click **Save Changes**.

Once enabled, all users in the organization will gain access to the MFP PIN section within their user profiles.

7.2 Generating a PIN (User)

Each user must generate their own PIN after the feature has been enabled by the organization owner.

1. Log in to your **Efflux Cloud Capture** account.
2. Go to your **User Profile**.



3. Find the section labeled **MFP PIN**.
4. Choose a PIN length between **6 and 10 digits**.
5. Click **Generate** to create your PIN.
6. Review your generated PIN and click **Save Changes**.

⚠️
PIN Validity:

- Each PIN is valid for 3 months from the time of generation.
- You can regenerate a new PIN at any time

7.3 Using the PIN on the MFP

Once your PIN is generated:

1. On the MFP login screen, select **PIN Login**.
2. Enter your assigned PIN.
3. Upon successful authentication, you'll be logged into your Efflux Cloud Capture account.

7.4 Disabling MFP PIN Login (Organization Owner)

If the Organization Owner decides to disable PIN login:

1. Navigate to:
   User Management → **Organization Profile**
2. Turn **MFP PIN Login** off.
3. Click **Save Changes**.

Once disabled:

- Users will **no longer be able to log in** using their PINs.
- All existing PINs will become **invalid immediately**.

7.5 Security Notes

- Do not share your PIN with others.
- Regenerate your PIN immediately if you suspect unauthorized access.
- Always log out from shared MFPs after use.

8. Resource Access Permissions

Efflux Cloud Capture (ECC) provides flexible control over which users and groups can access system resources. The **Owner** and **Admin** roles are allowed to assign access permissions for all major resource types, including:

- Templates
- Picklists
- Connections
- Clients

This ensures secure separation of responsibilities and control over configuration elements within the environment.

8.1 Assigning Access to Resources

For each resource listed above, Owners and Admins can assign access to:

- **All Users**
- **Specific User Group(s)**
- **None**

By restricting access, administrators can ensure that sensitive or test configurations are only visible to authorized users

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8.2 User Access Behavior by Resource Type

Users without administrative privileges have **limited capabilities** when interacting with assigned resources. Below are the behaviors based on resource type:

1. **Templates**
   If a user has access to a Template:
   - They **can see** it in the Templates page.
   - They **cannot open or edit** it.
   - They **can apply** it when uploading a document.

2. **Connections**
   If a user has access to a Connection:
   - They **can see** it in the Connections page.
   - They **cannot open or edit** it.
   - They **can use** it when creating a new Template.
     (only if they also have the Create Resources permission)

3. **Picklists**
   If a user has access to a Picklist:
   - They **can see** it in the Picklists page.
   - They **cannot open or edit** it.
   - They **can use it** when creating a new Template.
     (only if they also have the Create Resources permission)

4. **Clients**
   If a user has access to a Client:
   - They **can see** it in the Clients page.
   - They **cannot open or edit** it.
   - They **can use** it while connecting to a client device.

Important:

A user **cannot** use a Template assigned to a Client if they do **not** have permission for that Template.

Resource access cannot be bypassed through Client assignments.

8.3 User-Owned Resources

Users automatically receive **full control** over any resource that **they create**, including:

- **Templates**
- **Picklists**
- **Connections**
- **Clients**

For user-owned resources:

- They **can view** them
- They **can edit** them
- They **can use** them
- They **can delete** them

This allows non-admin users to self-manage resources they are responsible for, without needing further administrative support.

8.4 Best Practices

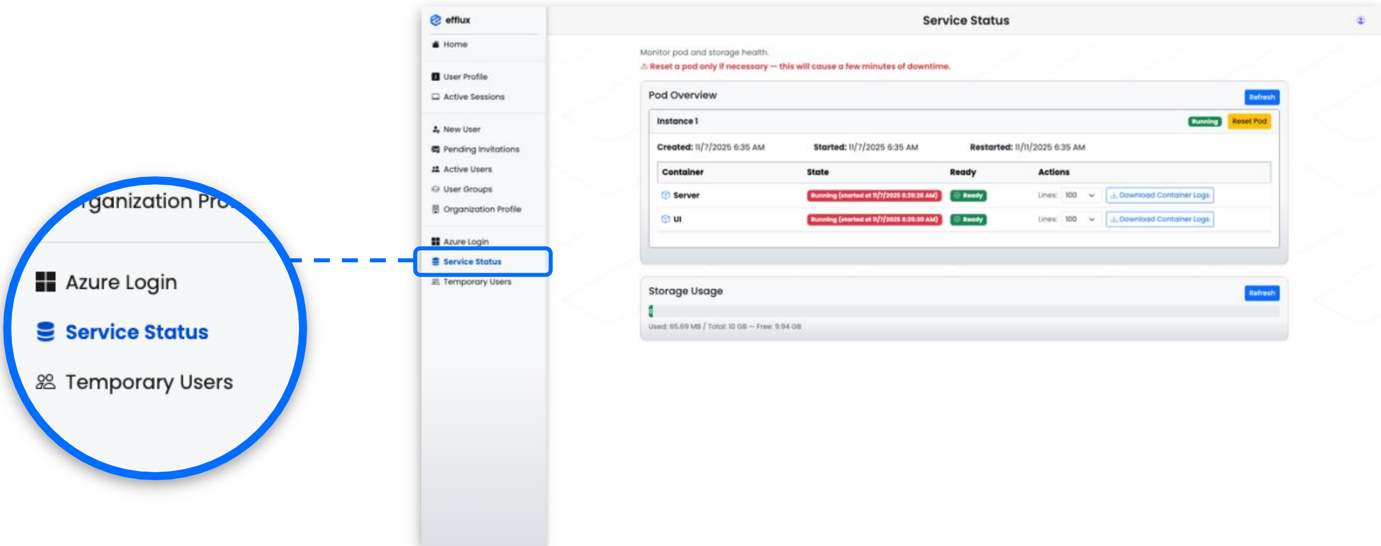
- Assign access based on job function, not convenience.
- Use groups rather than individual assignments to simplify permission management.
- Regularly review who has Create Resources permissions.
- Avoid granting access to unnecessary Clients or Templates to maintain data boundaries.

9. Service Status

The **Service Status** page provides Owners with visibility into the operational state of their Efflux Cloud Capture (ECC) environment. From this section, they can monitor system health and manage instance-level actions when required.

9.1 Accessing Service Status

To view service status:



1. Navigate to:
   User Management → Service Status

   On this screen, Owners will see information about:

   - Current instance operational status
   - Persistent storage usage

   This enables proactive maintenance and troubleshooting.

9.2 Instance Status

The **Instance Status** field displays the current running state of the organization's ECC instance. This helps diagnose issues such as:

- Service responsiveness
- Background task availability
- Job execution behavior

If the instance is not running normally, the page may show degraded states or service warnings.

9.3 Persistent Storage Usage

ECC uses persistent storage to hold:

- Uploaded job data
- Processing artifacts
- Configuration metadata

The **Persistent Storage Usage** indicator shows how much capacity is currently consumed. Monitoring this value helps organizations:

- Avoid storage-related job failures
- Manage large batch uploads
- Clean up unused resources if necessary

If storage approaches capacity limits, users should consider pruning old or unused data.

9.4 Resetting the Instance

The Reset Instance option allows an Owner to forcefully restart the ECC environment.

This can be useful when:

- The instance becomes unresponsive
- A system component is stuck
- Critical errors occur

However, use this operation with caution.

⚠️
Important Note:
Do NOT reset the instance unless absolutely necessary.

Resetting will:

- Immediately terminate all running jobs
- Interrupt connected users
- Bring the entire system down temporarily
- Cause a downtime period of several minutes

After the reset, the service will automatically restart and resume normal operation once ready.

9.5 Best Practices

To reduce unnecessary impact on users:

- Perform resets only when troubleshooting requires it.
- Notify teammates if they may be affected.
- Review persistent storage usage regularly to prevent system slowdowns.
- Consider contacting support if system instability persists.

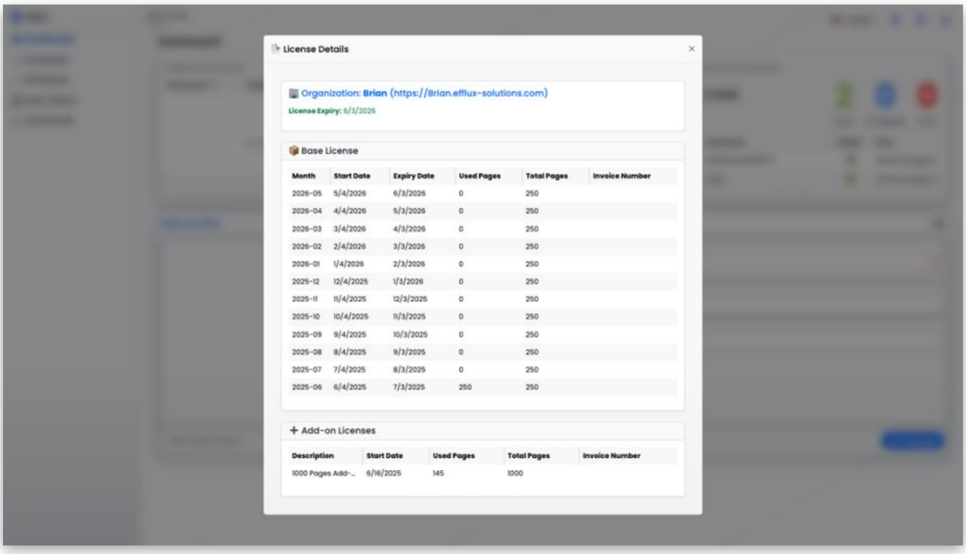
10. License Details

Efflux Cloud Capture provides an overview of your organization's license usage, status, and available add-ons.

Accessing License Information

To view license details:

1. Go to the **top menu**.
2. Navigate to **Settings** → **License Details**.



Information Available

The **License Details** page displays:

- **Current License Status**
  Overview of your active subscription plan and its expiration (if applicable).

- **Available Licenses & Add-ons**
  List of all included features, modules, and optional add-ons that are currently active or available for purchase.

- **Remaining Page Quota**
  Shows the number of **pages left** for document processing in your billing cycle.

⚠️
Note: For upgrades, renewals, or enabling additional features, please contact the **ECC support team** or your account manager.

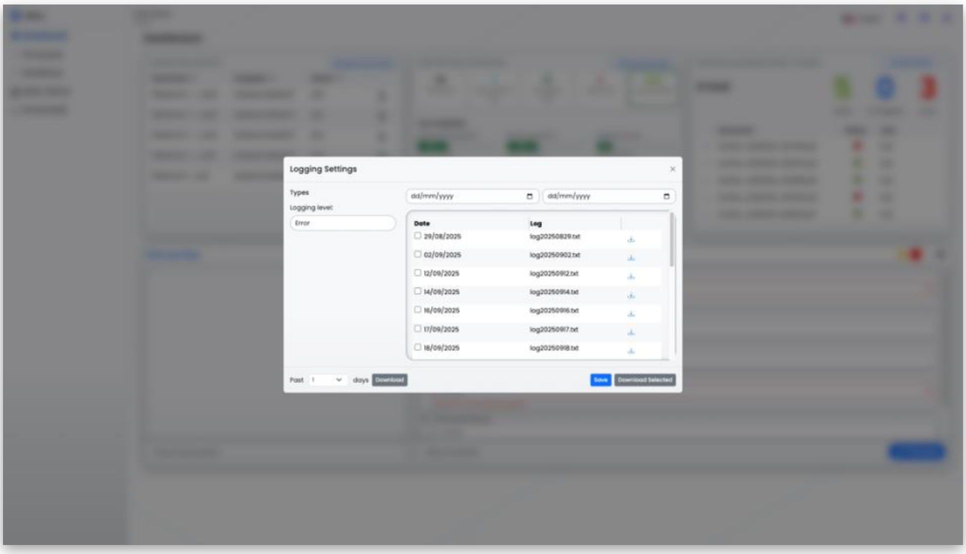
11. Logging Settings

The **Logging Settings** section allows authorized users to manage how system logs are handled and accessed within Efflux Cloud Capture.

Accessing Logging Settings

To view and configure logging:

1. Navigate to the **top menu**.
2. Go to **Settings → Logging Settings**.



Available Actions

Within the **Logging Settings** page, users can:

- **Download Server Logs**
  - Access and download system log files for diagnostics, auditing, or support purposes.
- **Change Logging Configuration**
  - Adjust system logging parameters, including:
    - **Logging Level** (e.g., Error, Warning, Info, Debug)
    - Other log settings depending on system configuration

⚠

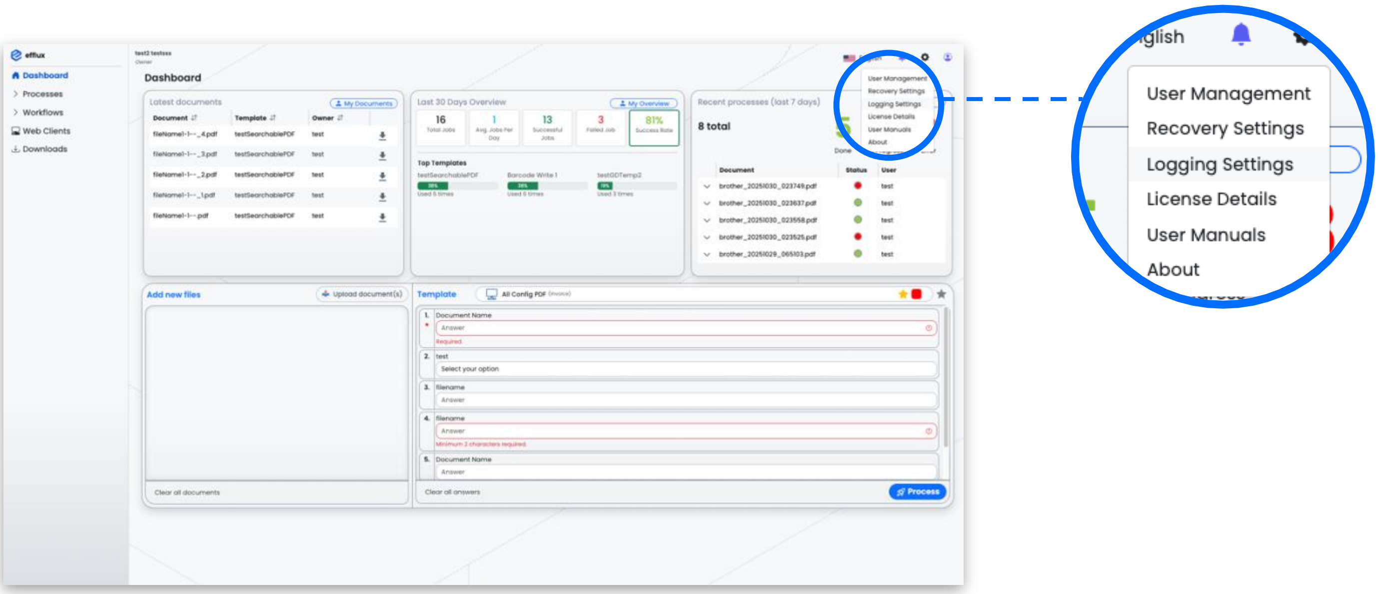
Note: Modifying logging levels can impact system performance and should only be adjusted by technical administrators or under the guidance of ECC support.

12. Recovery Settings – Owner Access Only

The **Recovery Settings** section provides tools for backing up, restoring, merging, and resetting your system configuration. **This section is accessible only to the owner account**.

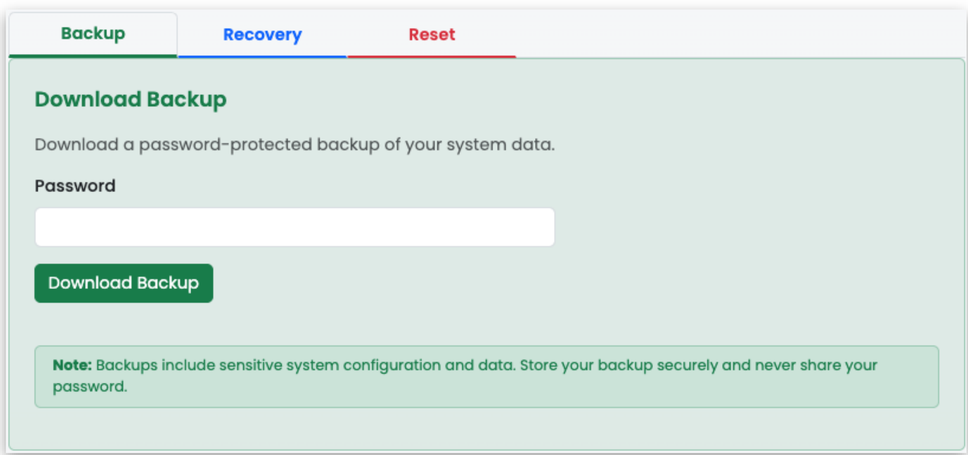
You can find it by navigating to:

Top Menu → **Settings** → **Recovery Settings**



12.1 Backup Tab

The **Backup** tab allows you to create a secure backup of your system's current configuration.



To **create a backup**:

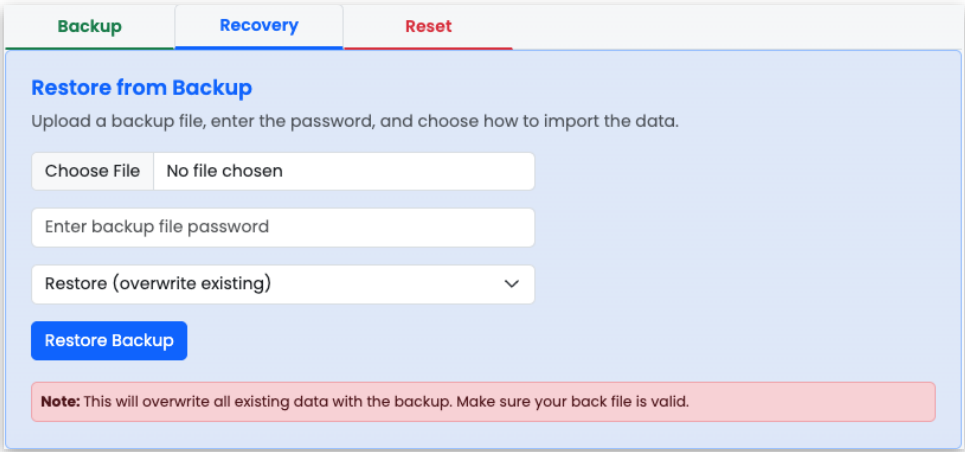
1. Enter a **password** to protect your backup file.
2. Click the **Create Backup** button.
3. A **password-protected ZIP file** will be downloaded.
   This file includes:
   - Settings

- Templates
- Picklists
- Connections
- Clients

Important: Keep the password safe. You'll need it to restore or merge the backup later.

12.2 Recovery Tab

The Recovery tab allows you to restore or merge a previously saved backup.



To recover:

1. Upload your backup .zip file.
2. Enter the **password** used during the backup.
3. Choose between:This file includes:
    - **Restore** – Replaces the current system state with the backup.
    - **Merge** – Combines the backup with existing data, resolving conflicts.

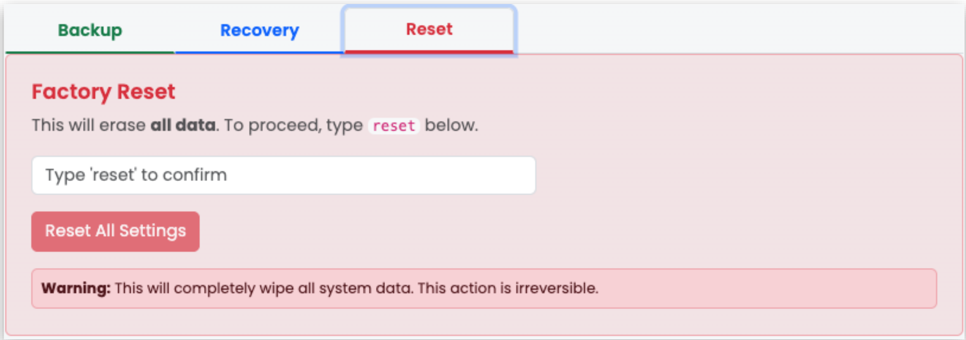
    Restore:
    - This will wipe all current settings, templates, picklists, connections, and clients.
    - The system will be restored to the exact state of the backup.

    Merge:
    When merging, if the backup contains items with the same internal ID as existing items, a conflict occurs. You'll be prompted to choose one of the following conflict resolution options:

    1. **Keep Existing** – Retains the current data and ignores conflicting items from the backup.
    2. **Replace** – Overwrites existing items with the versions from the backup.
    3. **Keep Both** – Retains both items by duplicating the backup version.

12.3 Reset Tab

The **Reset** tab allows the owner to **wipe all configuration data** in the system.



What will be deleted:

- All Settings
- Templates
- Picklists
- Connections
- Web Clients

⚠ **Warning:** This action is irreversible and should be used with caution.

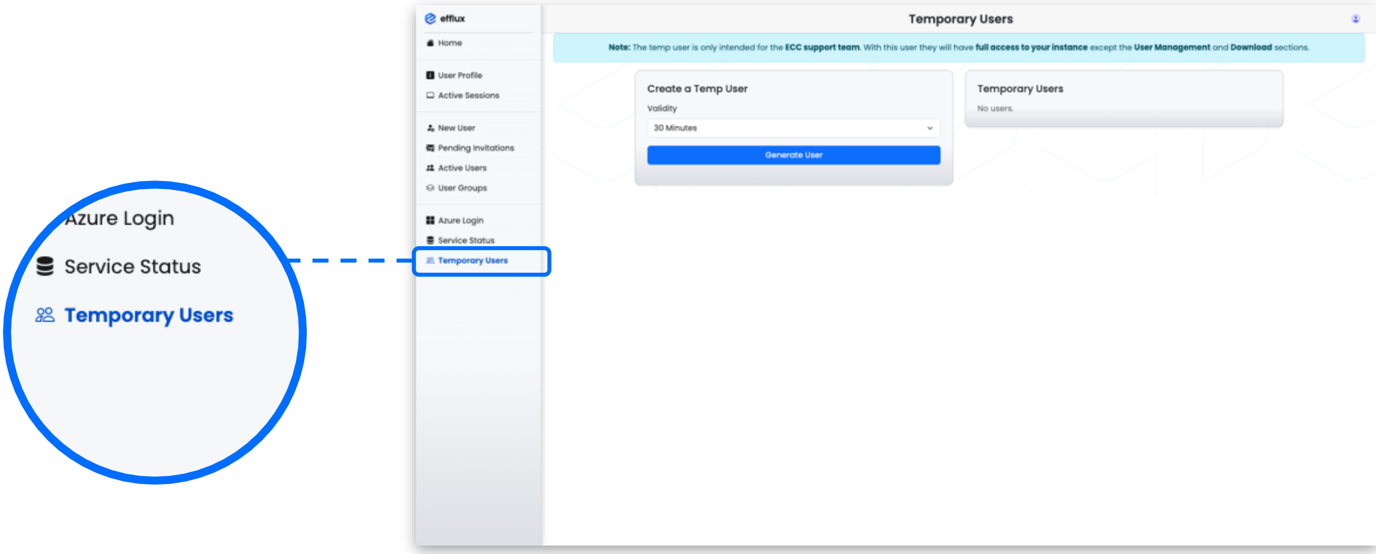
12.4 Access Restriction

Only the owner account has permission to access the Recovery Settings section. Ensure that sensitive operations like backup, restore, merge, and reset are performed responsibly.

13. Temporary User Access – Owner Only

The **Temporary User** feature allows the owner account to grant limited-time access to the system, intended **exclusively for the ECC Support Team**.

You can find this feature under:
Top Menu → User Management → Temporary User

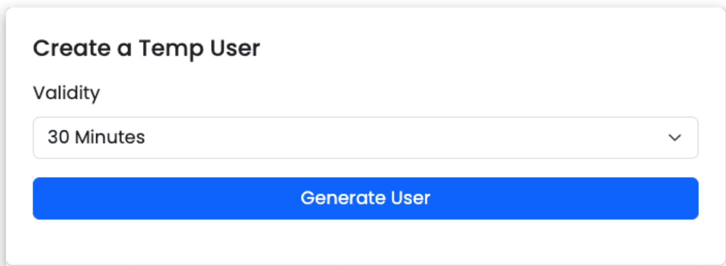


Purpose

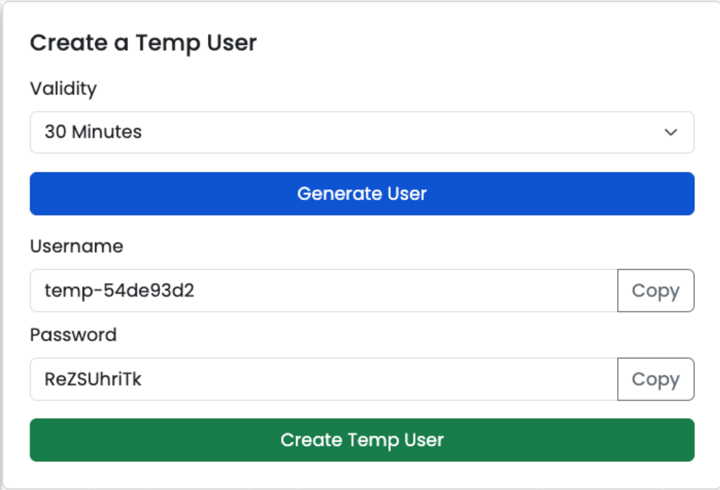
This feature enables ECC support personnel to temporarily access your environment to assist with troubleshooting or support requests.

- Full access to your system
- No access to User Management and Download sections
- Valid for 30 minutes to 3 hours

13.1 How to Create a Temporary User



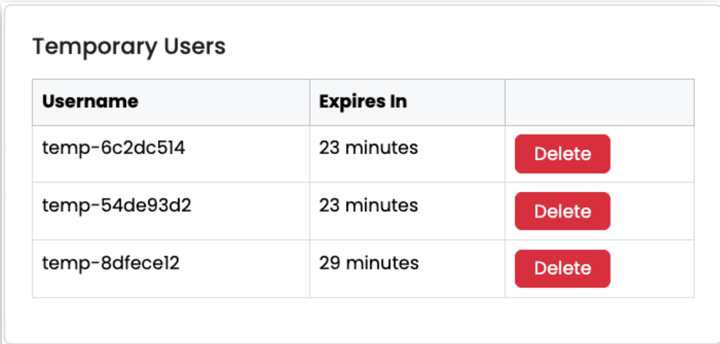
1. Select the **duration of the temporary account** (between 30 minutes and 3 hours).
2. Click **Generate User**.



3. A random **username and password will be generated**.
4. **Copy the credentials** and securely share them with the ECC support team.
5. Click **Create Temp User** to activate the account.

⚠️ **Note: The credentials are shown only once** — make sure to copy them before closing or navigating away.

13.2 Managing Temporary Users



- On the **right side of the page**, you'll see a list of all active temporary users.
- Each entry shows:
  - Username
  - Expiration time
  - A **Delete** option to manually revoke access at any time

---

13.3 Access Restriction

Only the **owner account** can:
- View the Temporary User tab
- Create or delete temporary accounts

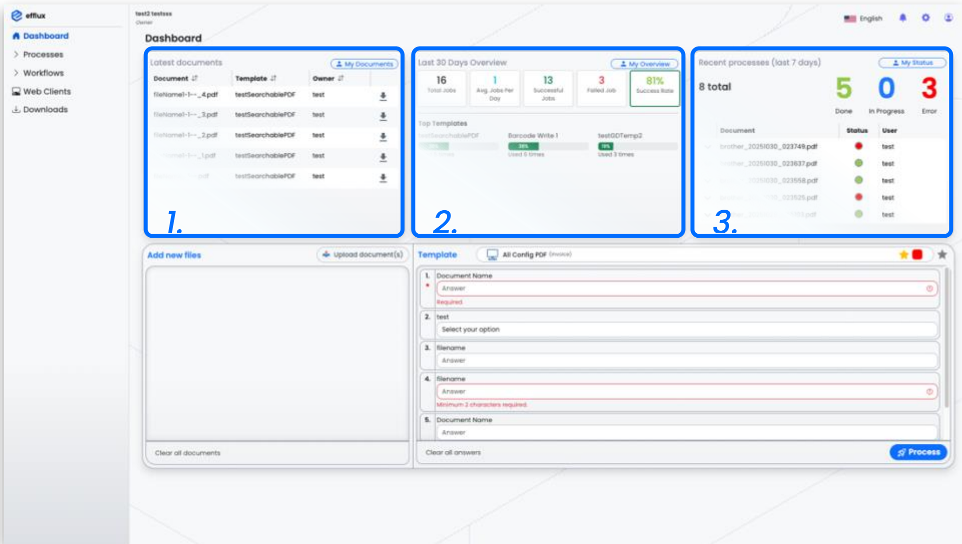
This safeguard ensures control over who has access to your environment.

14. Home / Dashboard

The **Home Dashboard** is the central hub of Efflux Cloud Capture, giving users quick access to recent activity, favorite templates, and document upload tools — all tailored to their access level.

14.1 Top Dashboard Cards

At the top of the dashboard, users will find **three summary cards**:



1. Latest Documents

- Displays a list of the most recent documents that are ready for download (based on the user's access permissions).
- Each document has a **Download** button for quick retrieval.

2. Jobs Overview

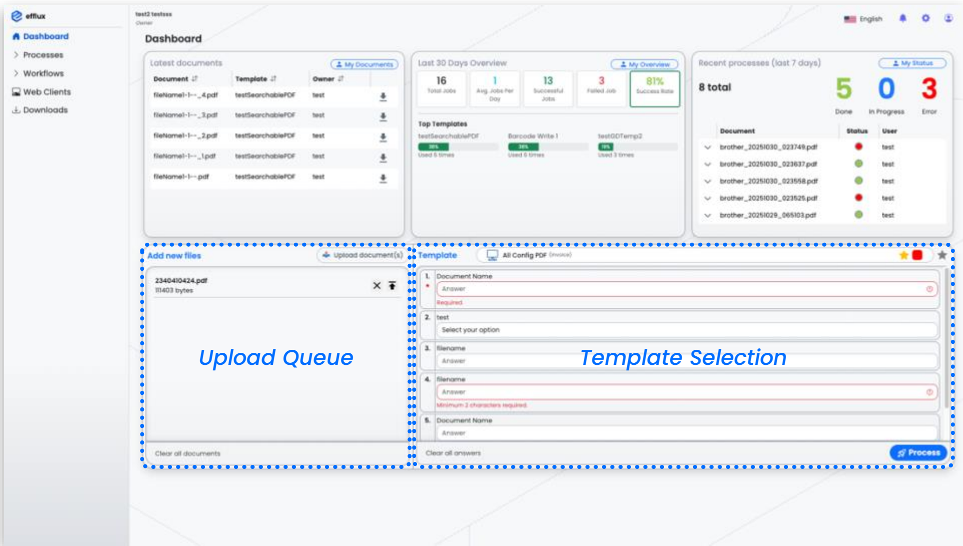
- My overview – Show Total Jobs, Average Jobs per Day, Total Successful Jobs, Total Failed Jobs, Jobs' success rate and top templates in the Last 30 Days.
- All Users overview – Show Total Jobs, Average Jobs per Day, Total Successful Jobs, Total Failed Jobs, Jobs' success rate, top templates and Top Users in the Last 30 Days.

3. Recent Process Summary

- Visual summary of document processing activity over the last 7 days:
  - **Done**
  - **In Progress**
  - **Error**
- Also lists the **status and details of the last 5 documents** processed by the user.

14.2 Upload Section (Bottom Card)

The lower section of the dashboard is dedicated to **document upload**.



Left Side: Upload Queue

- Displays a list of documents selected for upload.
- Users can add documents by:
  - Clicking **"Upload Document"** to browse files from the local system.
  - Using the **device camera** to capture an image in real time.
- Each file appears in the queue with upload controls.

Right Side: Template Selection

- Users must select a **template** for the upload.
- Templates can be **filtered by favorites** using the **star icon**.
- Once a template is selected, related **questions** (fields) appear below it.

Uploading Documents

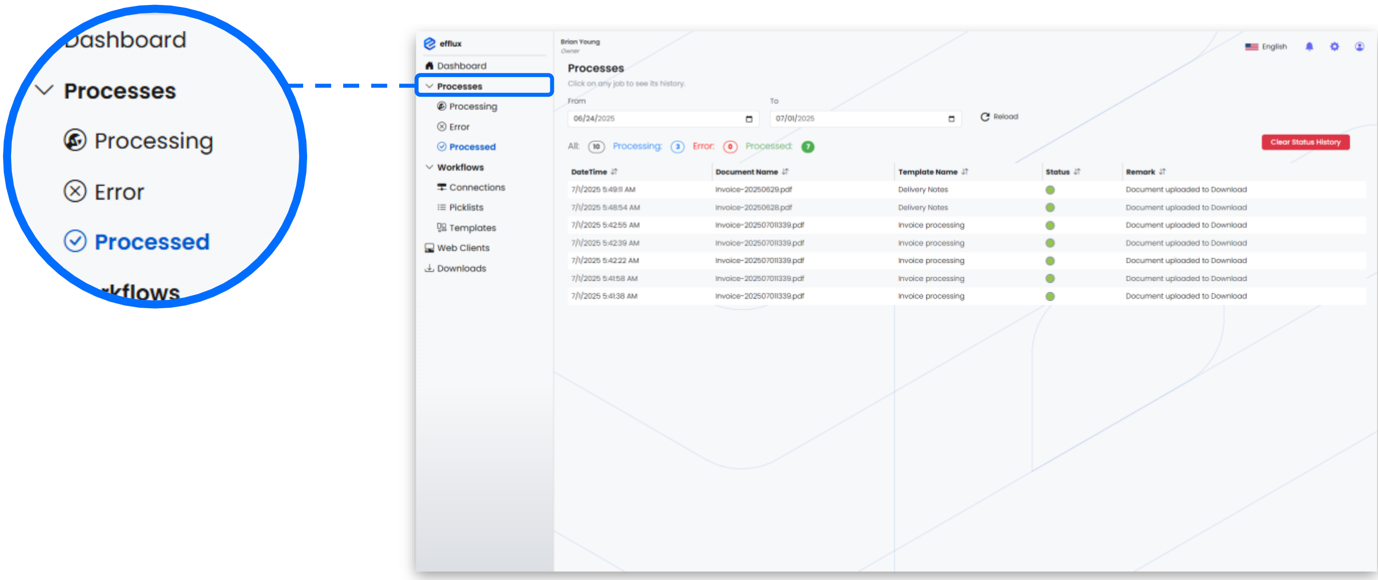
- Users can:
  - Upload **all documents at once** using the **"Process"** button at the bottom-right.
  - Upload **individual documents** using the action button next to each item in the queue.
- Upon **successful upload**, a **green checkmark** appears next to the document name.
- If an error occurs, a **notification** is shown in the **top-right corner** with the error message.

15. Process Section

The **Process** section allows users to monitor and review the status of their uploaded documents. It provides real-time feedback, filtering options, and access to complete document history.

Accessing the Process Section

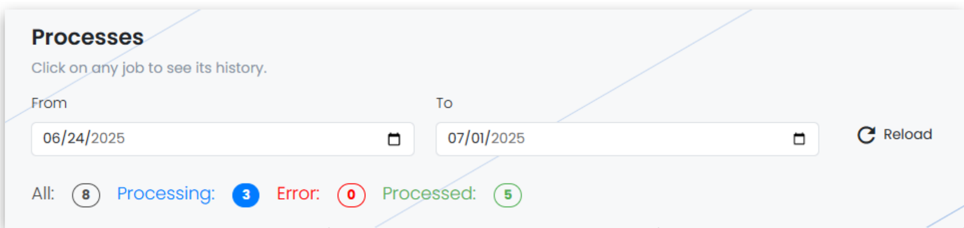
- Navigate via the **left navigation bar** and click on **"Process"**.



15.1 Filtering Options

At the top of the Process page, users can apply filters to refine the list of displayed documents:

- **Processing** – shows documents currently being processed
- **Error** – shows documents that failed during processing
- **Processed** – shows documents that were successfully processed

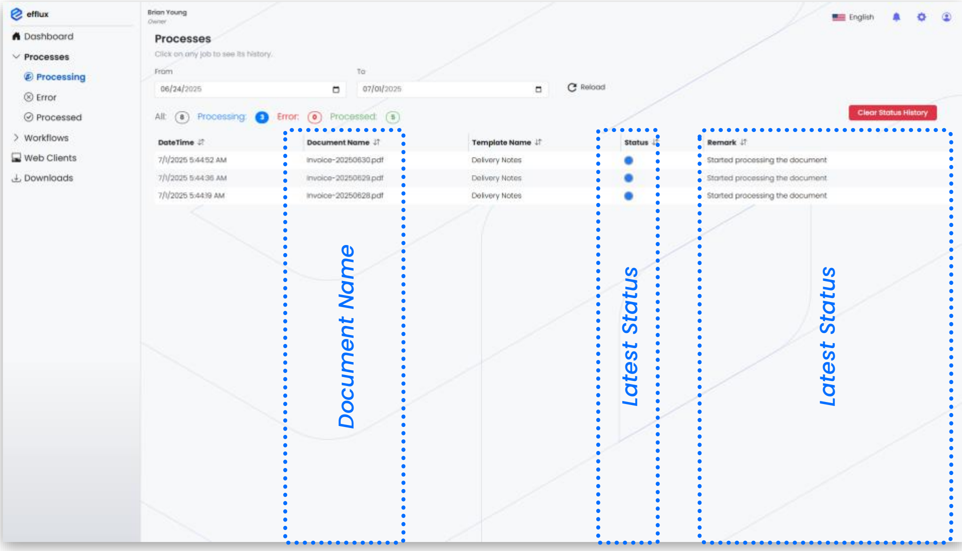


Note: By default, the view displays documents from the **last 7 days**.
Users can extend the view to show documents from the **last 1 month** using the filter controls.

15.2 Document List Overview

The main list displays all documents that match the selected filters. For each document, the following is shown:

- **Document Name**
- **Latest Status**
- **Remarks or Notes** (e.g., success, failure reason, etc.)

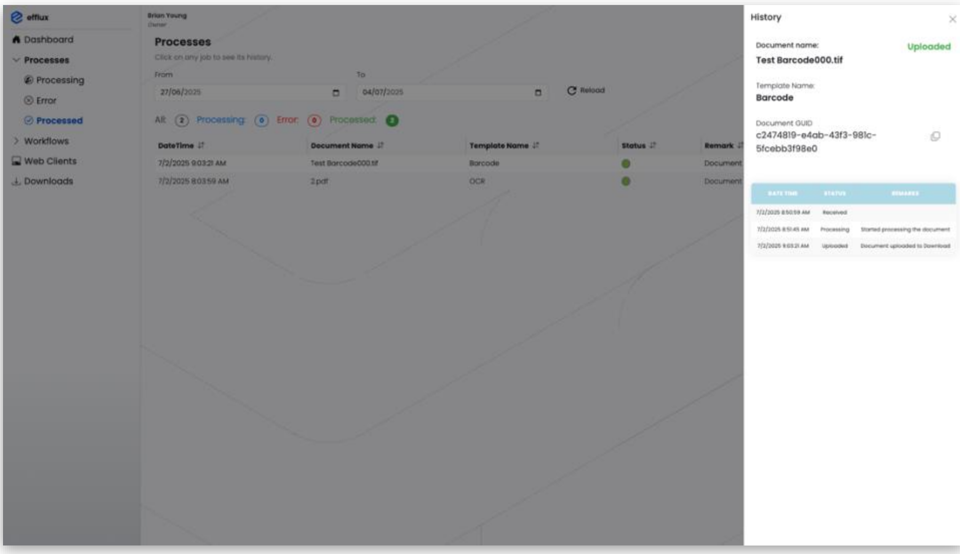


15.3 Viewing Document History

To see the full history of a document:

- Click on the **status label** of the document.

This will open a **detailed view** showing the document's complete lifecycle, including timestamps for each stage (upload, processing, completion, or error).



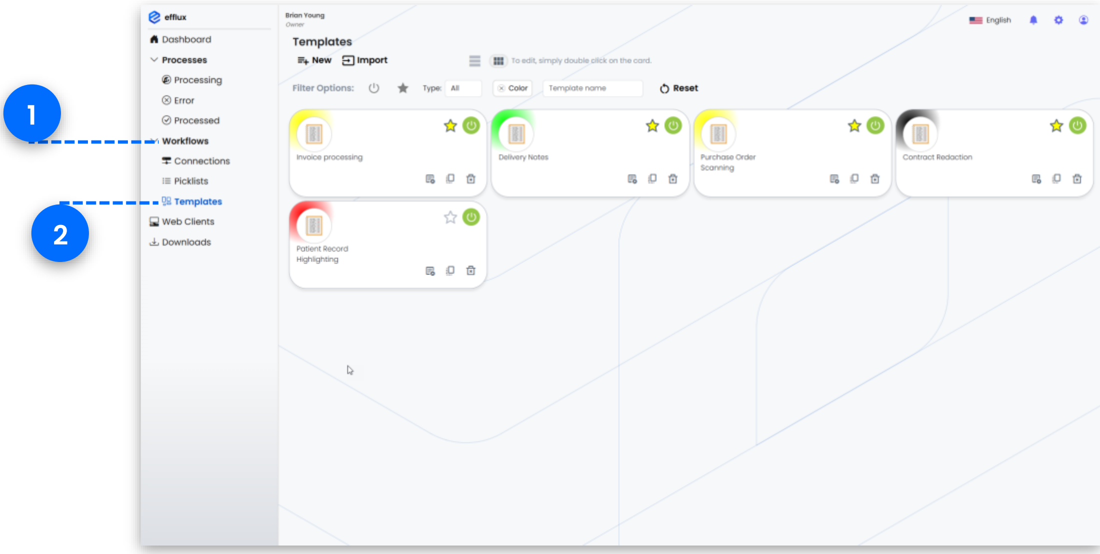
⚠ **Note:** This feature is useful for auditing, troubleshooting, and tracking document progress across time.

16. Templates

Templates define the workflow, layout, and extraction logic for processing documents in Efflux Cloud Capture. Each template can be configured with questions, output settings, and intelligent detection features like barcode or zone extraction.

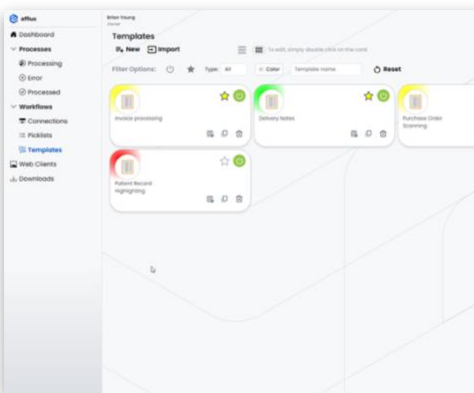
Accessing Templates

- From the **left navigation menu**, go to **Workflows** → **Templates**

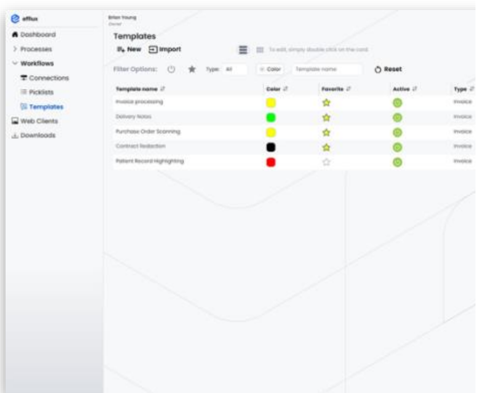


16.1 Template Views

Templates can be displayed in two formats:



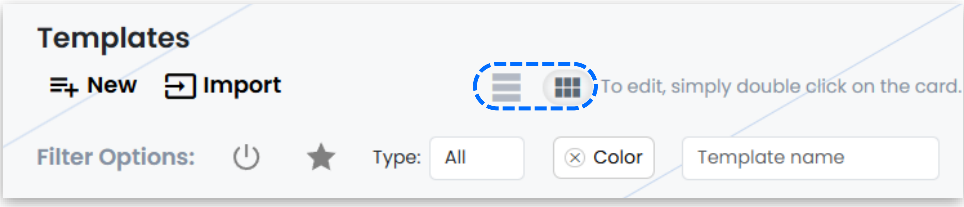
Card View



List View

- **Card View**
- **List View**

Users can switch between views using the **toggle button** at the top of the page.

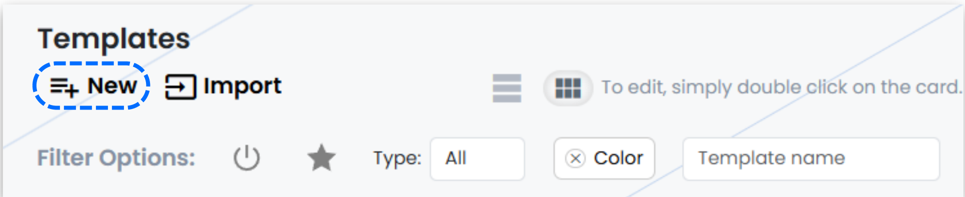


16.2 Filtering Templates

Templates can be filtered using the toolbar by:

- **Status** (Enabled/Disabled)
- **Favorites**
- **Template Type**
- **Color Tag**

16.3 Creating a New Template

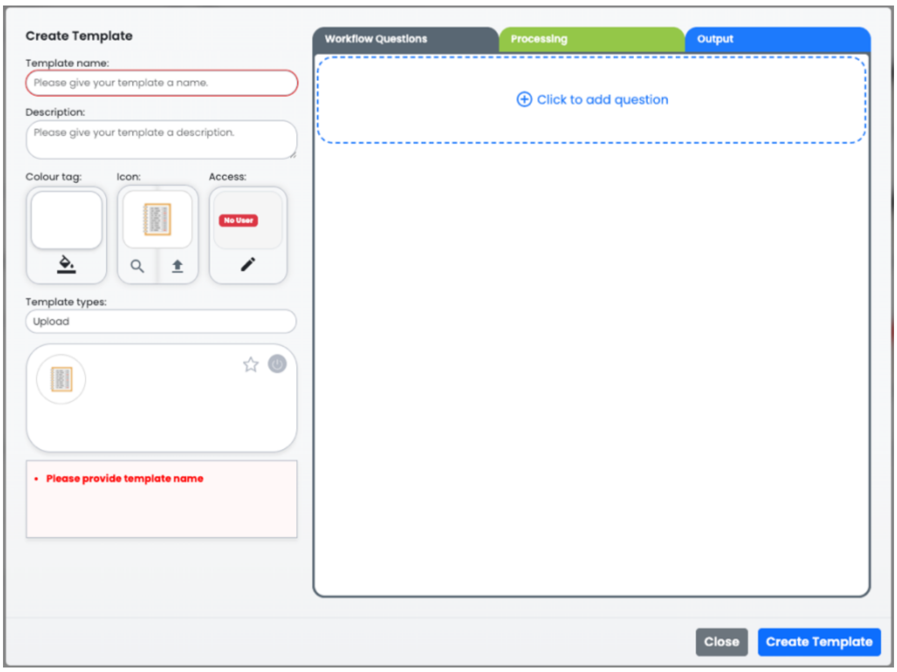


Click the **"New"** button at the top to begin creating a new template. You will be guided through multiple configuration sections:

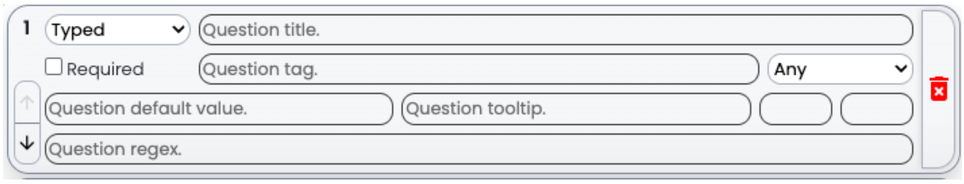
1. General Information

- **Template Name**
- **Description**
- **Color Tag & Icon**
- **Template Type** (select based on workflow purpose)

2. Workflow Questions

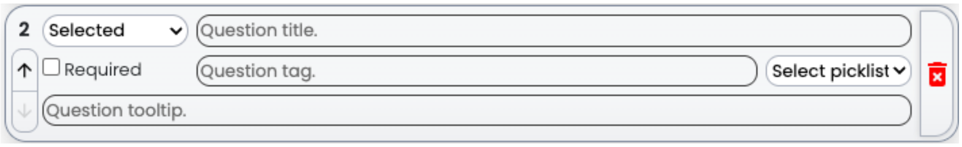


Click **"Add Question"** to define the fields that will be filled during document processing. You can create two types of questions:



a. Typed Question

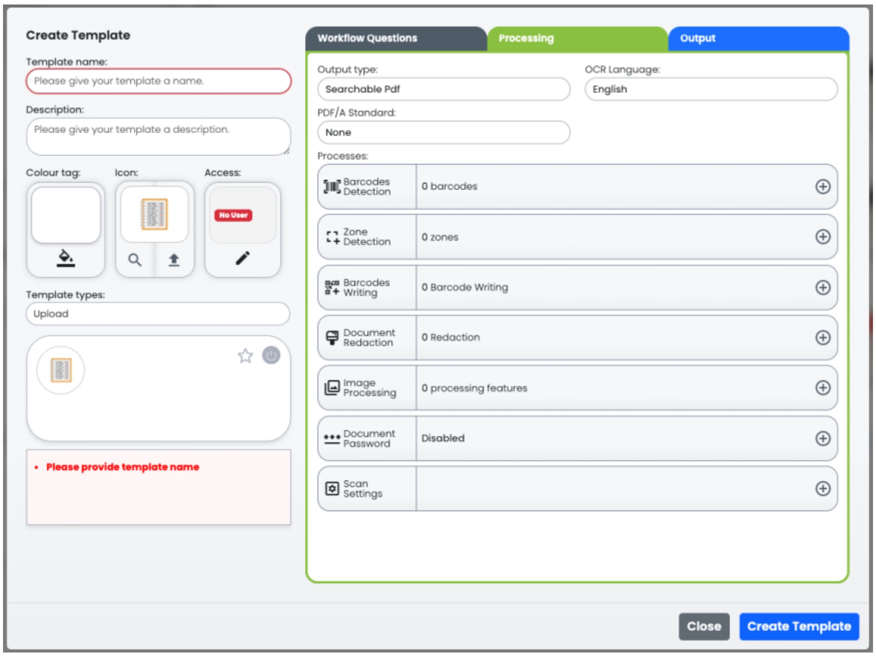
- Enter the **Question Text**
- Mark if **Required**
- Assign a **Unique Tag**
- Choose **Data Type**: Any, Text, or Number
- Optionally configure:
  - **Default Value**
  - **Tooltip**
  - **Minimum & Maximum Length**
  - **Validator Regex**



b. Selected Question

- Provide the **Question Text**
- Mark if **Required**
- Assign a **Unique Tag**
- Select a **Picklist** from the dropdown (must be pre-configured)
- Optional: Add a **Tooltip**

16.4 Advanced Processing Options



These features are accessed from the **Processing Tab** within a template and allow for deeper control over document output and privacy.

Output Configuration

- Choose the **Output Type** (e.g., structured data, PDF)
- Select the **OCR Language**
- If output is **PDF**, choose the **PDF/A Standard** (if applicable)

Barcode Detection

Click on **"Barcode Detection"** to configure rules:

- **Barcode Type**: Choose a specific barcode type or set to **Auto** for all
- **Pages**: Define the page numbers to scan for barcodes
- **Metadata Tag**: Assign a unique tag to store the barcode value
- **Split Page**: Enable to split the document where the barcode is detected
  - You can specify a **value** or **regex** to determine valid split barcodes
- **Exclude Page**: Works similarly to Split Page, but excludes the page instead

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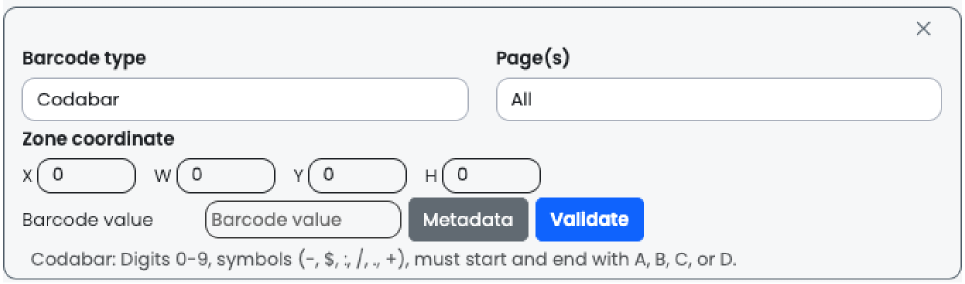
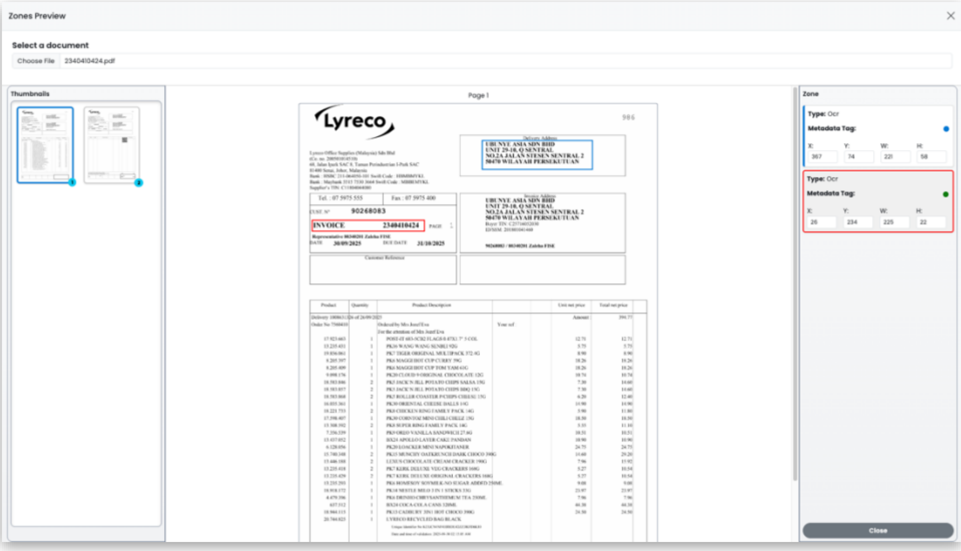
Zone Detection

Click on **"Zone Detection"** to configure region-based data extraction:



- Add multiple rules, each with:
  - **Zone Type**: Choose from OCR, Barcode, OMR, or MICR
  - **Page Number**: Specify the page to extract data from
  - **Metadata Tag**: Assign a tag for storing extracted data



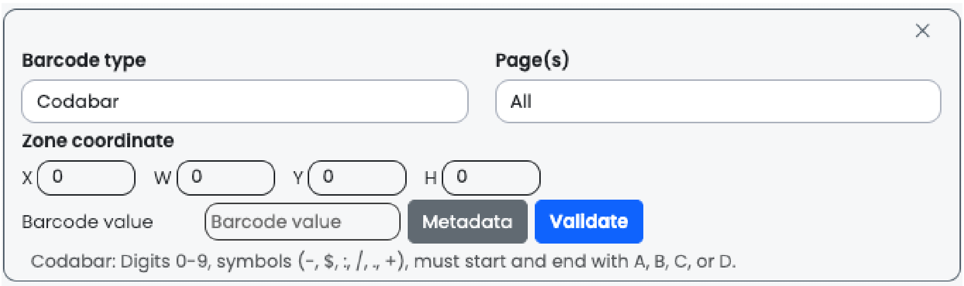
- Use the **"Test Zone"** tool:
    - Upload a sample document
    - Draw the zone(s) area on the document
    - The zone's coordinates will be saved for use in real-time detection

---

Barcode Writing

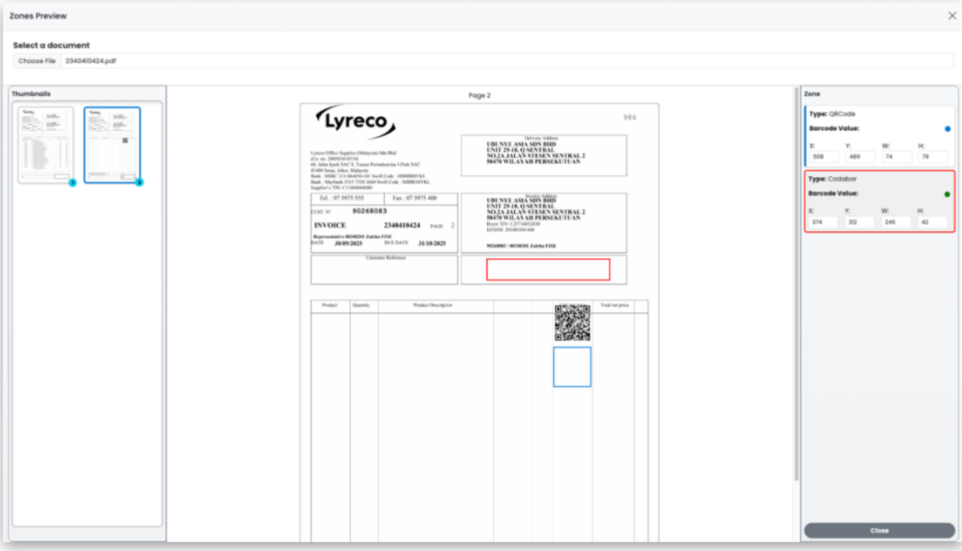
To add barcodes to documents:

1. Go to the **Processing Tab** → click **"Barcode Writing"**.
2. Click **"Add Barcode Rule"** and configure the following:



- **Barcode Type**: Choose the desired format (e.g., QR, Code128, etc.).
- **Pages**: Select one or more pages where the barcode should be written.
- **Barcode Value**: Enter a valid static value or dynamically use metadata.

3. Click **"Test Zone"**:



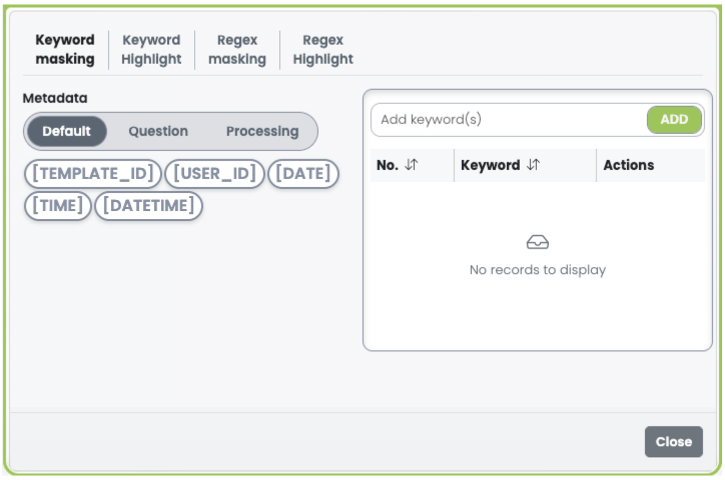
- Upload a sample document.
- Draw the location(s) where the barcode should be placed.
- The system saves the coordinates for rendering the barcode on output.

Note: You can define **multiple barcode writing rules** per template.

Document Redaction

Access via the **Processing Tab** → **Redaction**. Redaction allows masking or highlighting sensitive information in processed documents.

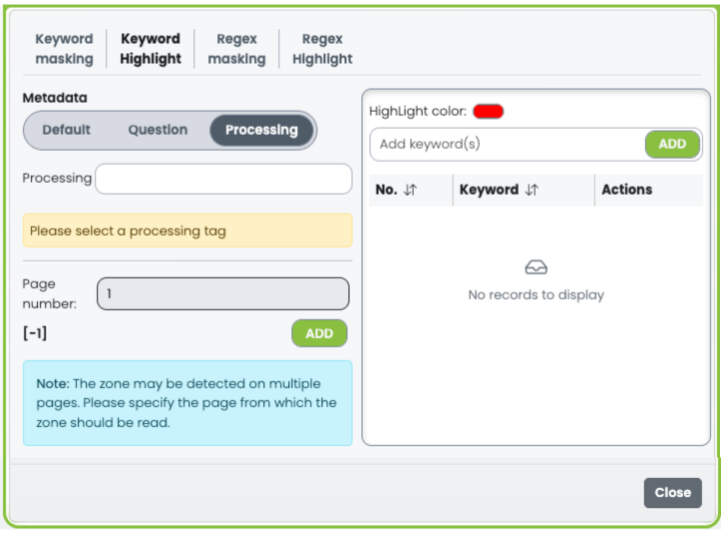
1. Keyword Masking



- Use metadata from:
  - Questions
  - Zone Detection
  - Barcode Detection
  - Default system metadata

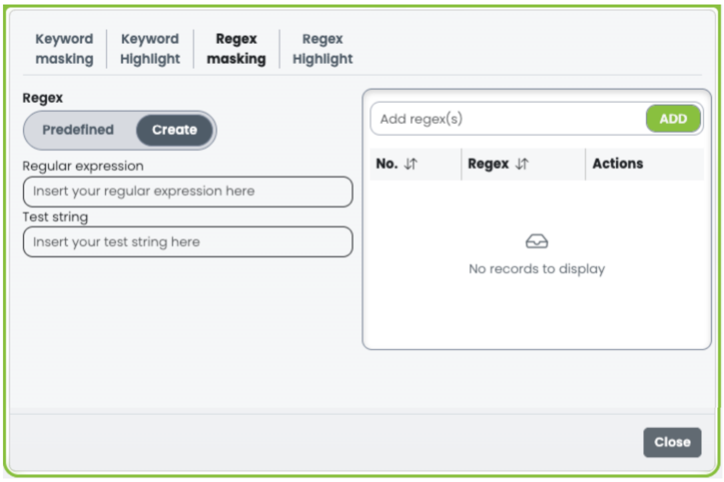
- Or directly input a keyword and click **"Add"** to mask it.

2. Keyword Highlighting



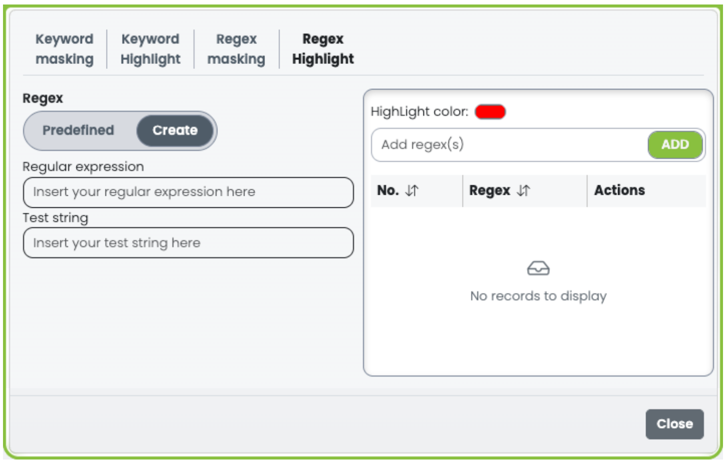
- Works the same as keyword masking but highlights the matched keyword.
- Choose a **highlight color**.

3. Regex Masking



- Apply masking to text matching a **regular expression**.
- Options:
  - Select from predefined regex patterns.
  - Or enter a **custom regex pattern** manually.

4. Regex Highlighting

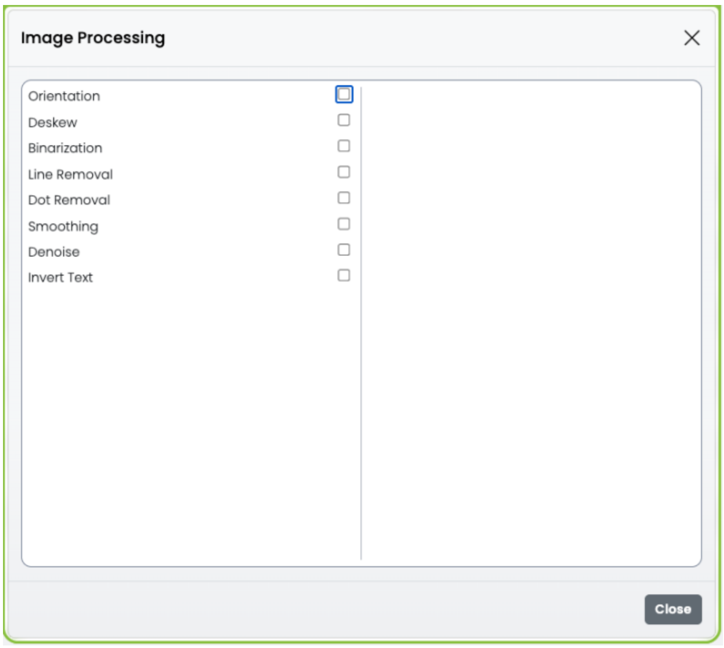


- Highlights text matching regex rules.
- Choose a **highlight color** for matched patterns.

⚠
Note: These features are crucial for protecting personal data, account numbers, or sensitive legal terms.

Image Processing

Access via **Process Tab** → **Image Processing**. Enables pre-processing options to clean and enhance document images.
You can toggle the following tools:



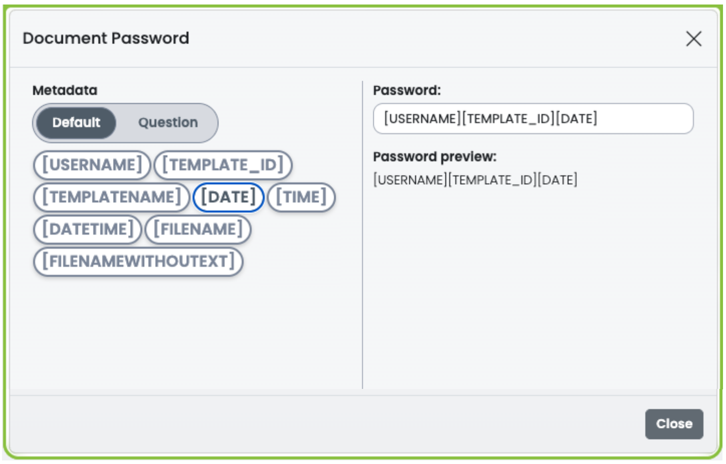
- **Auto Orientation**
- **Deskew**
- **Binarization**
- **Line Removal**
- **Dot Removal**
- **Smoothing**

- **Denoise**
- **Invert Text**

⚠
Note: These features improve OCR accuracy and ensure document clarity.

Document Password Protection

Access via **Process Tab** → **Document Password**.



Protect the output document by setting a password:

- Choose to:

o Use a password derived from **existing metadata** (e.g., customer ID, invoice number), or

o **Manually enter** a fixed password.

⚠
Note: Once configured, all generated documents using this template will require the password for access.

16.5 Output Tab

The **Output Tab** allows users to configure how and where processed documents will be delivered. You can define **multiple connectors** to send documents to one or more destinations (e.g., cloud storage, SFTP, email, etc.).

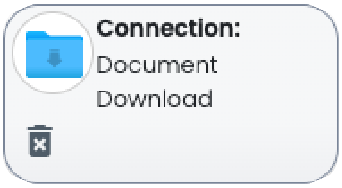
Note: Connections must be pre-defined.

Setting Up Output Destinations

1. Go to the **Output Tab** of your template.
2. Click **"Add Connector"**.
3. Choose from your list of **existing connections**.

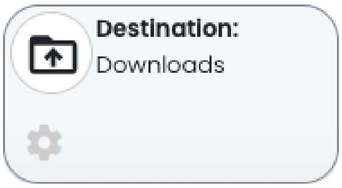
Once a connection is selected, three configuration cards appear in a row:

Card 1: Connection Type



- Displays the **type of connector** selected (e.g., Google Drive, SharePoint, SFTP).
- This section is informational and depends on the predefined connection.

Card 2: Destination Path



- Displays or allows editing of the **destination path/folder** where the document will be delivered.
- If the **connection settings** allow, the user can:
  - Modify the destination manually, or
  - Use **metadata tags**
    (e.g., `{ClientID}/{InvoiceDate}`)
    to dynamically generate the path.

Card 3: File Name

- Displays or allows editing of the **output file name**.
- Like the destination, file names can be:
  - **Manually defined**, or
  - Generated using **metadata tags**
    (e.g., `{ClientName}_{InvoiceNumber}.pdf`)
- The ability to edit depends on the **connection's configuration permissions**.

⚠
Note: You can add **multiple connectors**, each with its own destination and file naming logic — enabling flexible multi-destination delivery.

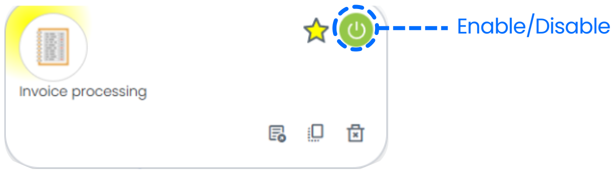
16.6 Template Management Features

Once templates are created, users have several tools to manage, organize, and reuse them efficiently.

Editing a Template

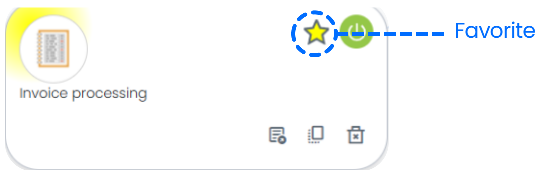
- To update a template, simply **double-click** on it.
- This opens the template editor where all configurations (questions, processing rules, outputs, etc.) can be modified.

Enabling or Disabling a Template



- Each template has a **power icon**:
  - Click it to **enable** or **disable** the template.
  - Disabled templates will not appear in the upload section for users.

Marking as Favorite



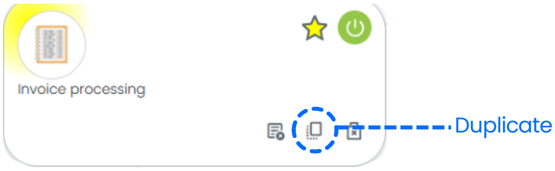
- Click the **star icon** on a template card to mark it as a **favorite**.
- Favorite templates can be quickly filtered and accessed from the dashboard upload section.

Deleting a Template

- Click the **trash/delete icon** on the template to permanently remove it.

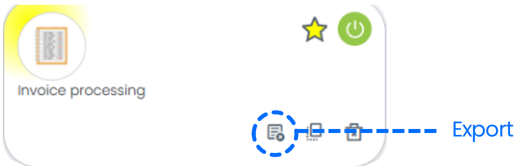
⚠ **Warning:** Deletion is irreversible. Be sure to export the template if you may need it later.

Duplicating a Template



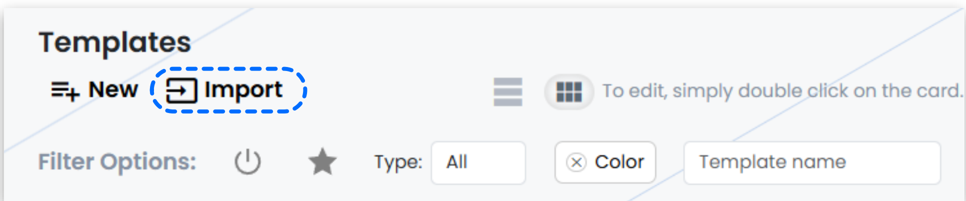
- Use the **duplicate function** (usually a clone icon or menu option) to make a copy of an existing template.
- The new template can then be renamed and customized without affecting the original.

Exporting a Template



- To export a template:
  1. Click the **export icon** on the template.
  2. The template will be downloaded as a file in a proprietary format. This file contains:
     - Template structure
     - Questions
     - Processing logic
     - Output settings

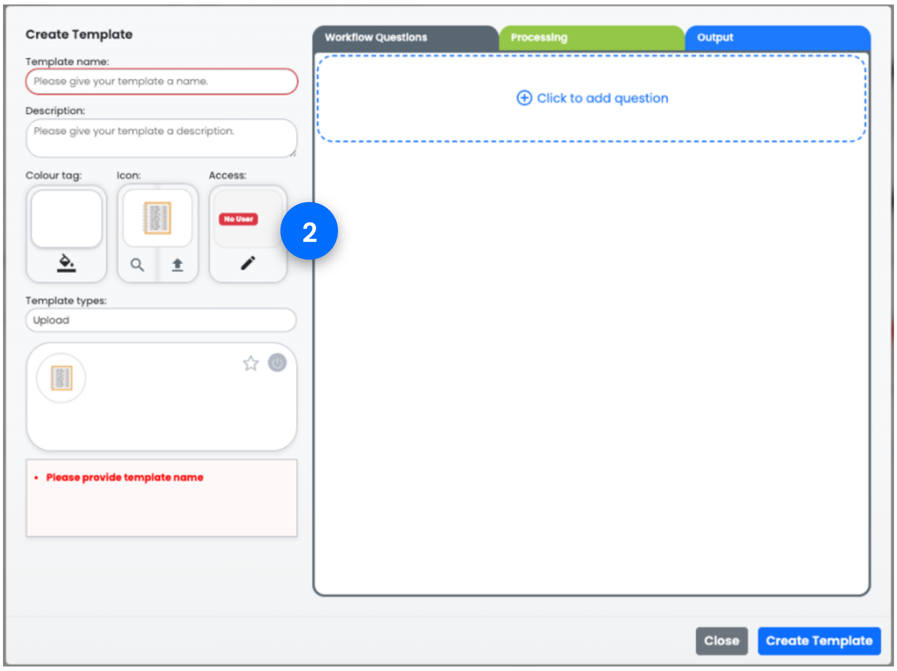
Importing a Template



- Click the **"Import"** button at the top of the Templates page.
- Upload the previously exported template file.
- The imported template will be added to your template list and can be used or modified as needed.

⚠️
Note: Import/export is especially useful for migrating templates between environments or sharing across teams.

16.7 Granting Access



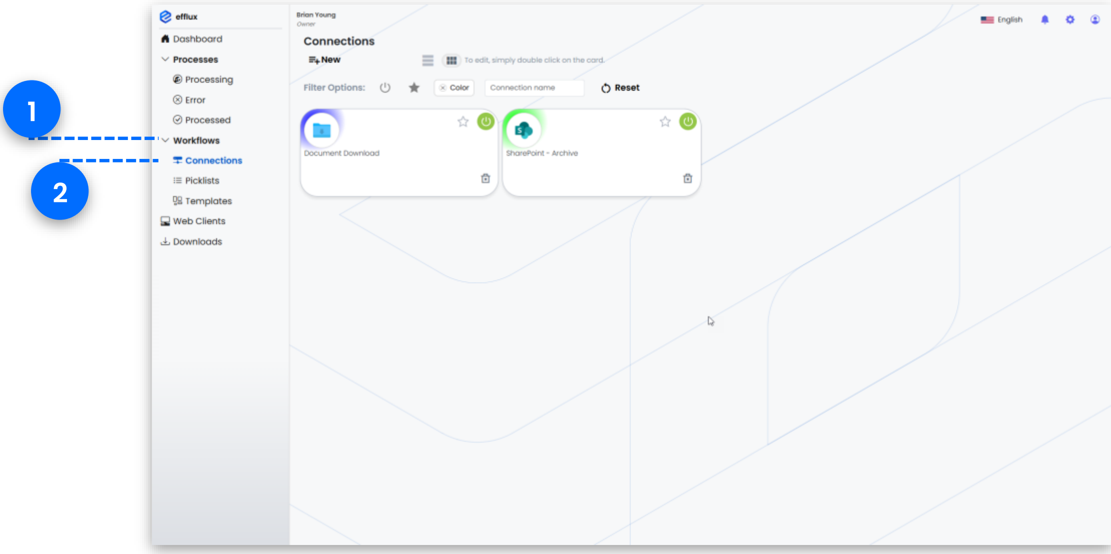
1. Open the Template.
2. Select the **Access** icon.
3. Click the **Edit** icon.
4. Assign access to:
    - Specific user groups, or
    - All users

What Access Allows

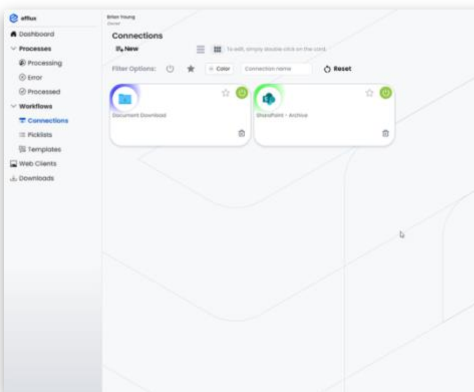
- Users who have access **can use the Template**, but **cannot modify it**.
- Admin users automatically have full access to all Templates.

17. Connections

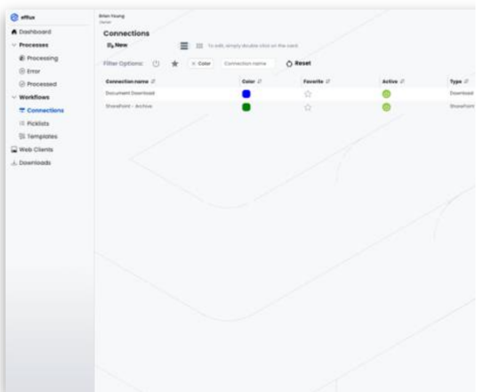
Connections define where processed documents will be delivered (e.g., cloud storage, file servers, etc.) or how they can be downloaded.
Accessible via the **left navigation menu** → **Workflows** → **Connections**, this section allows users to manage destinations for document output.



17.1 Viewing Connections



Card View



List View

Connections are displayed in two formats:

- **Card View**
- **List View**

Users can switch between views using the toggle button at the top of the page.

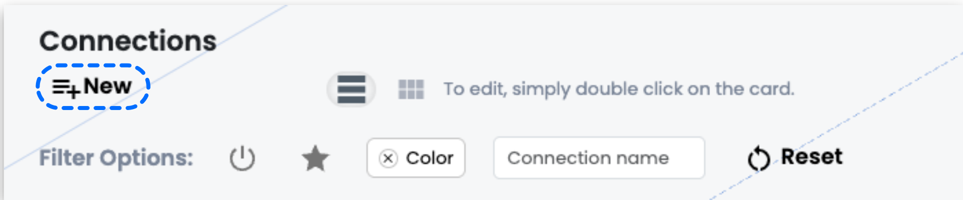
17.2 Filtering Options

Connections can be filtered by:

- **Enabled/Disabled** status
- **Favorite**
- **Color Tag**

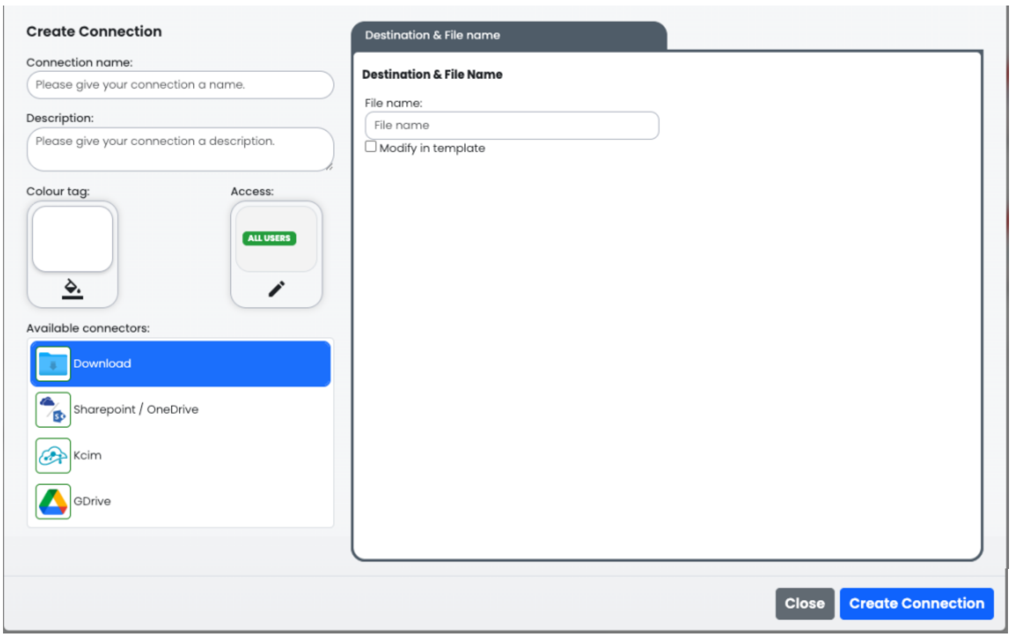
17.3 Creating a New Connection

To create a new connection:



1. Click the **"New"** button at the top.
2. Fill in the following:
   - **Connection Name**
   - **Description**
   - **Color Tag**
3. Choose a **Connection Type** from the list of available connectors (e.g., SFTP, SharePoint, Google Drive, Download, etc.).

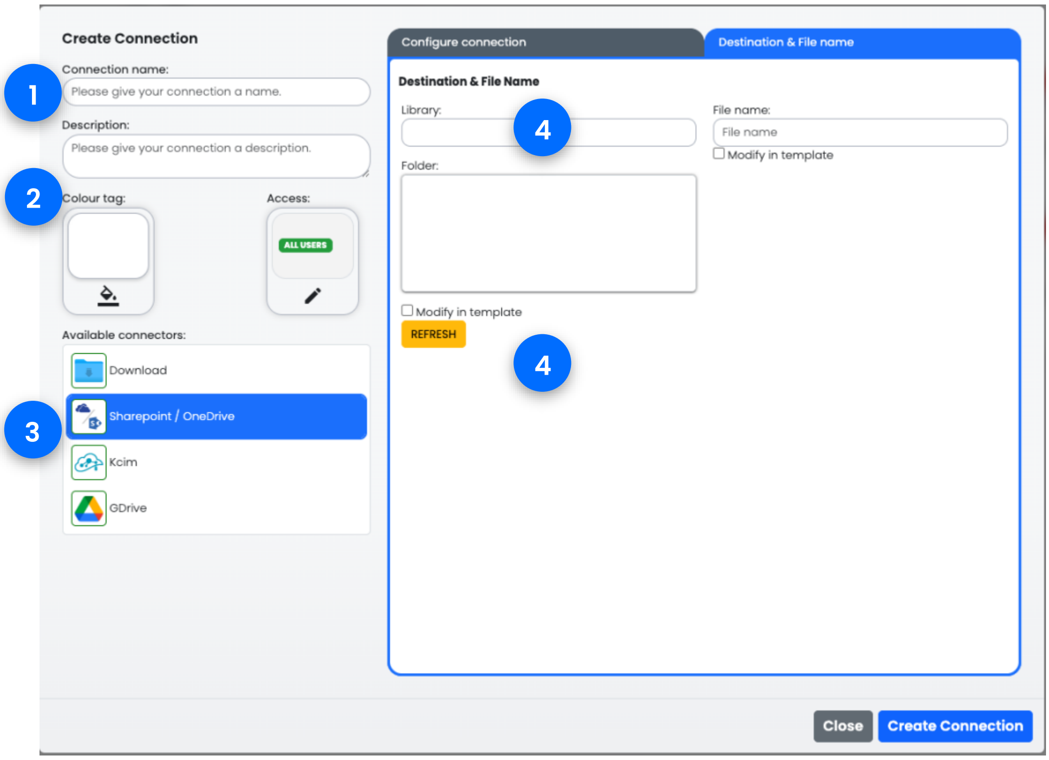
Download Connector



1. **Setting:** File Name (optional)
2. **Template-Level Control:** If allowed, users can **modify the file name** directly in the template's output tab using metadata or manual input.

⚠ **Note:** Destination is not required for Download Connector.

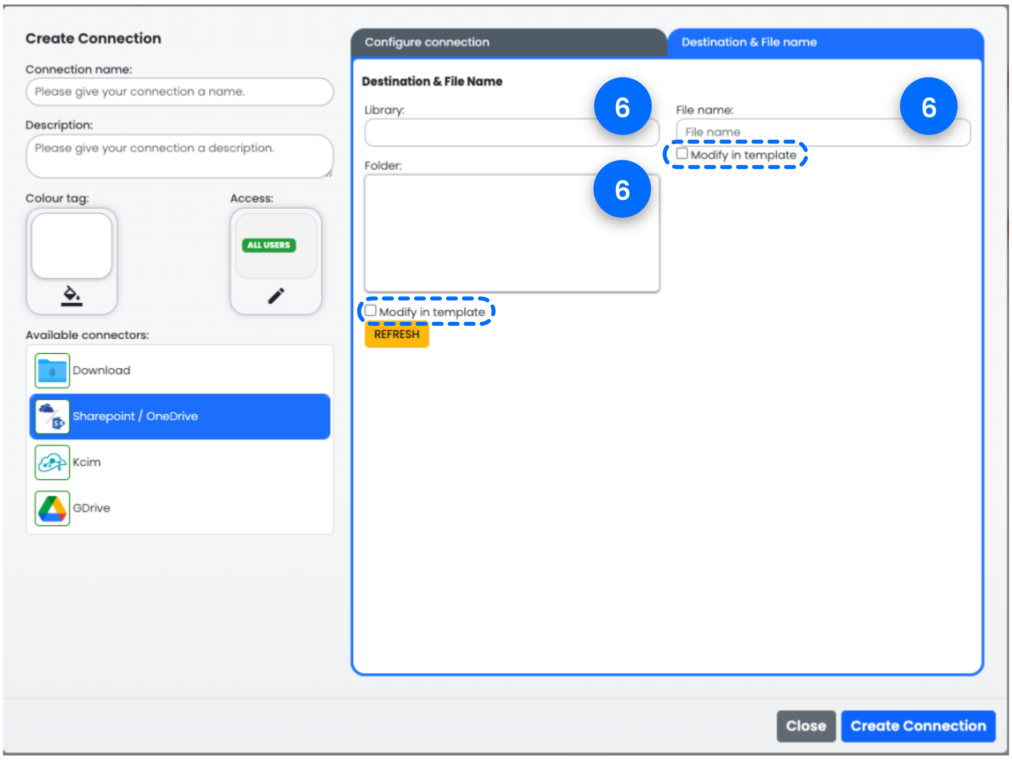
SharePoint Connector Setup



1. Provide a **connection name**
2. Provide **Description and Color tag** (optional)
3. Select the **SharePoint connector** under "Available Connectors"
4. Fill up all the authentication info under the **"Configure connection" tab**, and click the **"Test Connection"** button to authenticate. Make sure you follow the pattern below to **setup your Callback URI/Redirect URI**.

   `https://{YourInstanceUrl}/callback/oauth2/sp`

5. Given that the authentication info is correct, you will be prompted to "`https://login.microsoftonline.com/`" for **login and authenticate the SharePoint access**. Then, return to ECC page for **"Destination & File name" tab**.



6. For all **Library, Folder, and File name fields**, you are required to give a value OR check the **"Modify in template"** box if you wish to remain empty value.
7. When everything is configured, click on the **"Create Connection"** button to create the connection.
8. Once the connection is created successfully, it can be applied in the **Template configuration**.

17.4 Editing and Deleting Connections

- To **edit a connection**, simply **double-click** on the card or list item.
- To **delete a connection**, click the **trash icon** on the respective connection.

⚠ **Warning: Deletion is permanent.** Ensure no templates are actively using the connection before removing it.

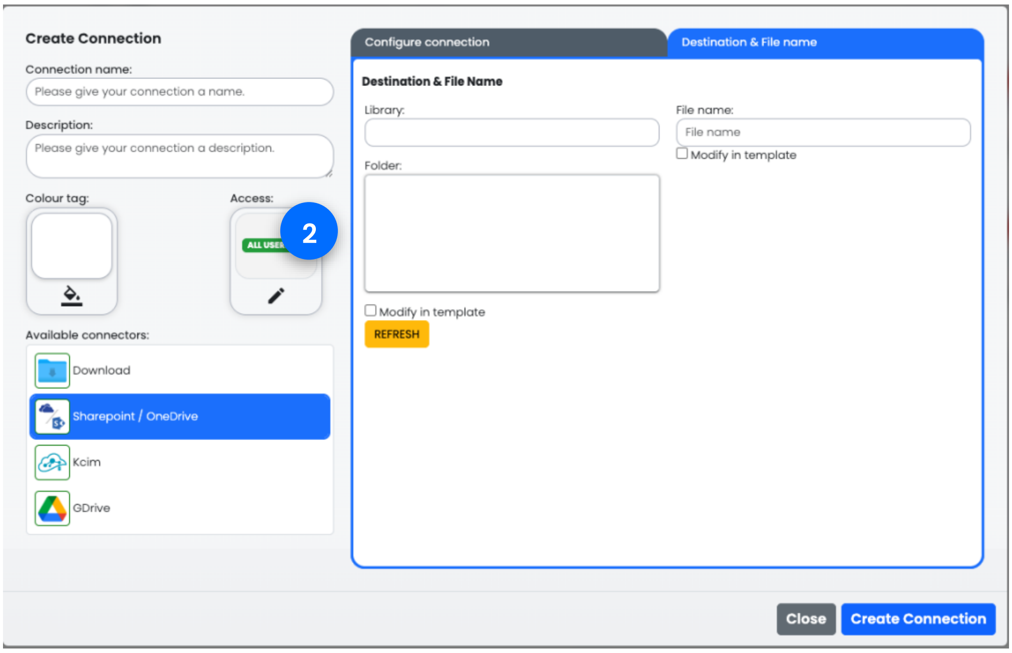
17.5 Connection Usage in Templates

Once a connection is created:

- It becomes available for selection in the **Output Tab** of any template.
- If the connector settings allow, users can edit:
  - **Destination folder/path**
  - **Output file name**

This enables flexible output routing for different processing workflows.

17.6 Granting Access



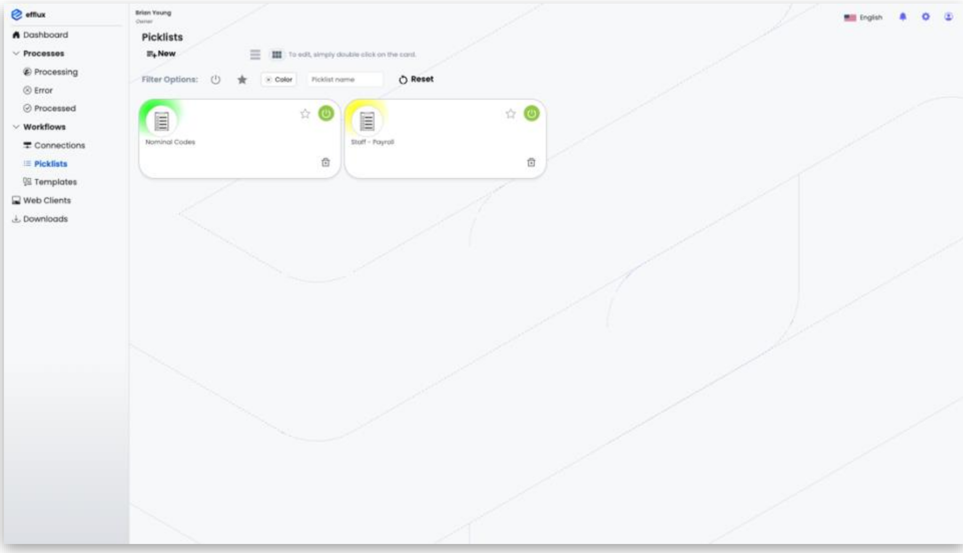
1. Open the Connection.
2. Select the **Access** icon.
3. Click the **Edit** icon.
4. Assign access to:
   - Specific user groups, or
   - All users

What Access Allows

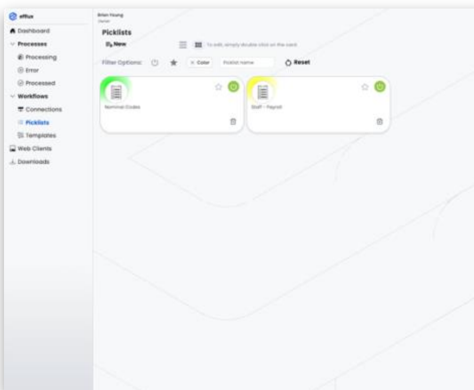
- Users must:
  1. Have access to the Connection, and
  2. Have permission to create resources
- Admin users automatically have full access to all Connections.

18. Picklists

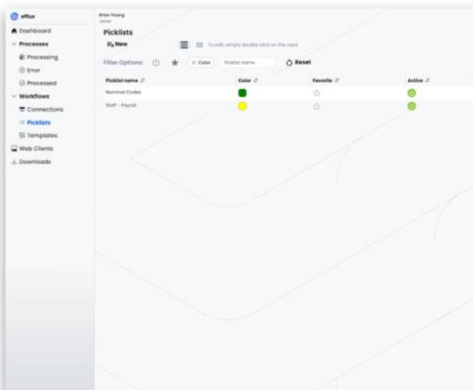
Picklists are predefined lists of selectable values that can be used in **template questions** (select-type questions). They help standardize input and improve data consistency during document processing.
Accessible via the **left menu** → **Workflows** → **Picklists**.



18.1 Viewing Picklists



Card View



List View

Picklists can be displayed in:

- **Card View**
- **List View**

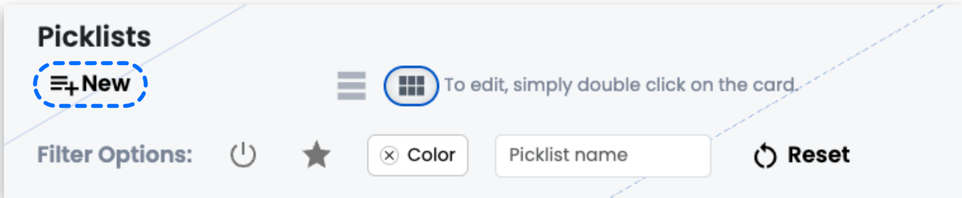
Users can switch between views at the top of the page.

18.2 Filtering Options

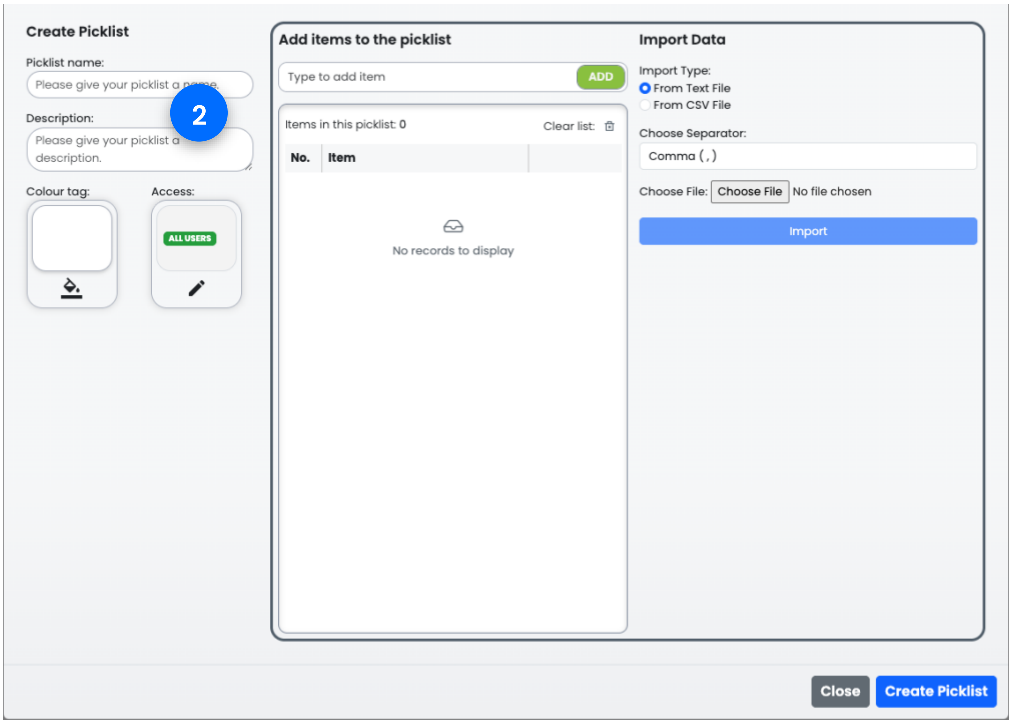
You can filter picklists by:

- **Enabled/Disabled** status
- **Favorite**
- **Color Tag**

18.3 Creating a New Picklist



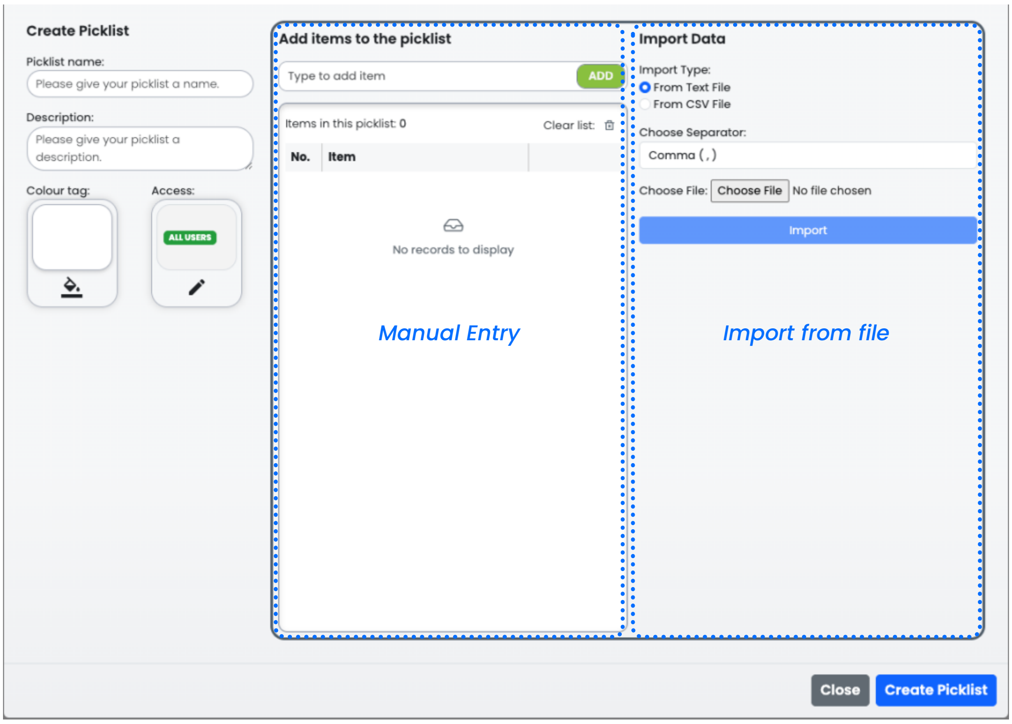
1. Click the **"New"** button at the top.



2. Enter the following details:
   - **Name**
   - **Description**
   - **Color Tag**
   - **Edit Access Group(s)**

18.4 Adding Picklist Items

There are two ways to add items to a picklist:



Manual Entry

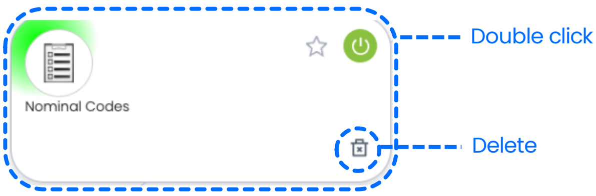
- Type the value into the input box and click **"Add"** to insert it.

Import from File

- Supported file types: **Text (.txt)** and **CSV (.csv)**
- When importing from a **Text file**:
  - Choose a **separator** (e.g., comma, semicolon, newline) to split the text into multiple list items.

⚠
Note: All items added will be available for use in template select-type questions.

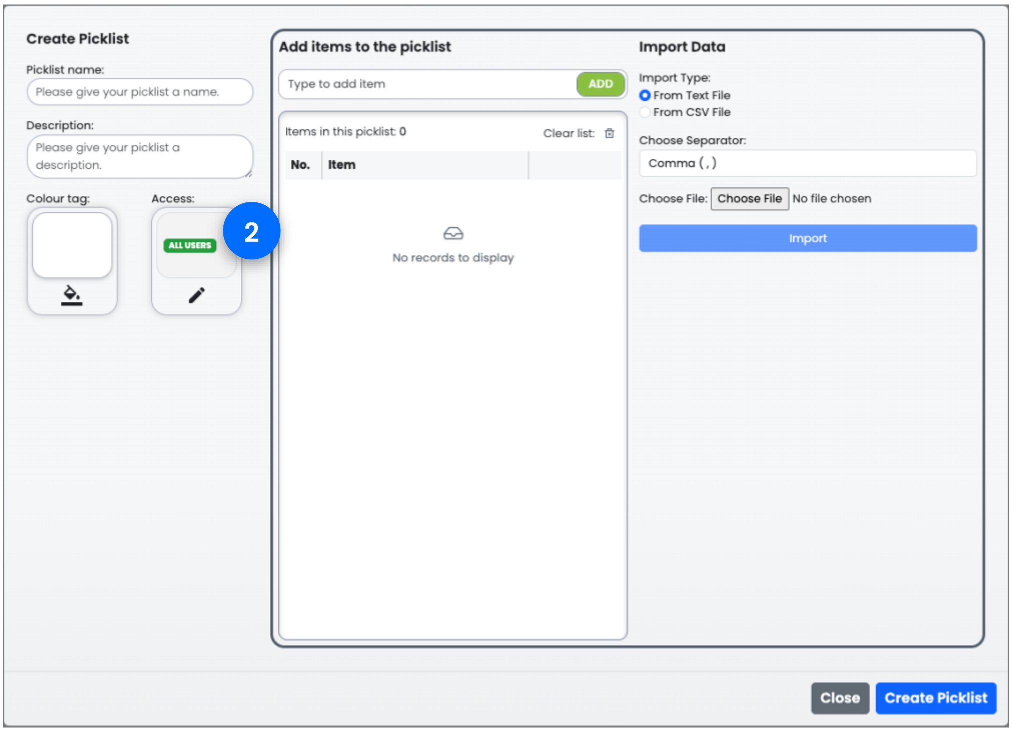
18.5 Editing and Deleting Picklists



- To **edit a picklist**, double-click on it to open and modify its items or settings.
- To **delete a picklist**, click the **trash icon** on the respective picklist card or row.

⚠
Note: Before deleting, ensure the picklist is not in use in any active template questions.

18.6 Granting Access



Access Rules
Picklists follow the same access rules as Connections.

Granting Access

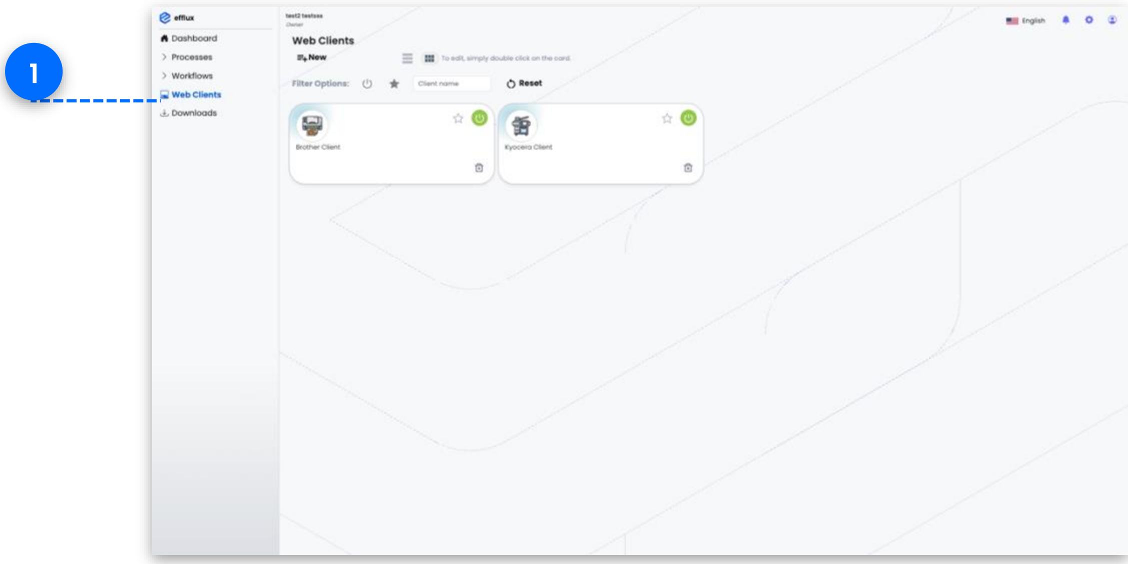
1. Open the Picklist.
2. Select the **Access** icon.
3. Click the **Edit** icon.
4. Assign access to user groups or all users

What Access Allows
- Users with access to the Picklist and permission to create resources can use the Picklist where applicable.
- Admin users automatically have full access to all Picklists.

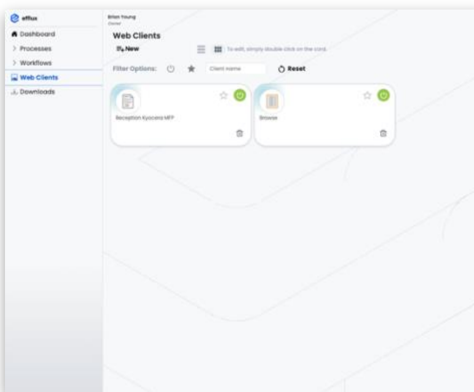
19. Clients

Clients represent external devices or applications (such as MFPs or kiosks) that interact with the Efflux Cloud Capture system. They can be configured to control access and determine which templates are available for each device.

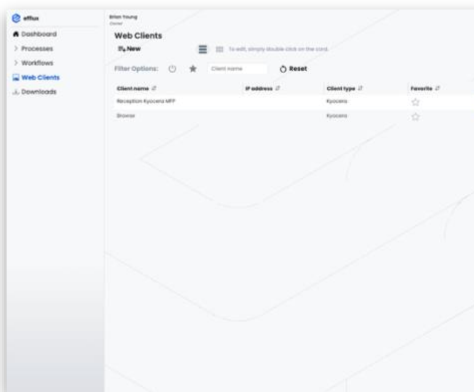
Accessible from the **left menu → Clients**.



19.1 Viewing Clients



Card View



List View

Clients can be displayed in:

- **Card View**
- **List View**

View type can be toggled from the top-right.

19.2 Filtering Options

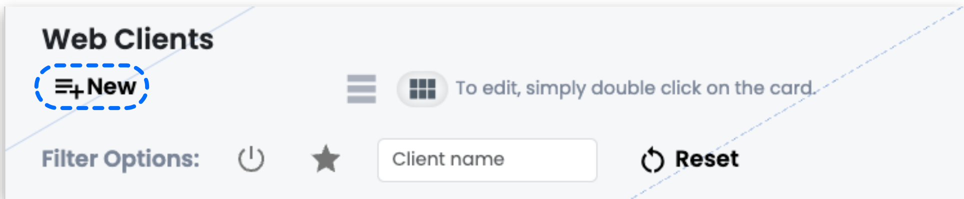
Clients can be filtered by:

- **Enabled/Disabled** status
- **Favorite**
- **Color Tag**

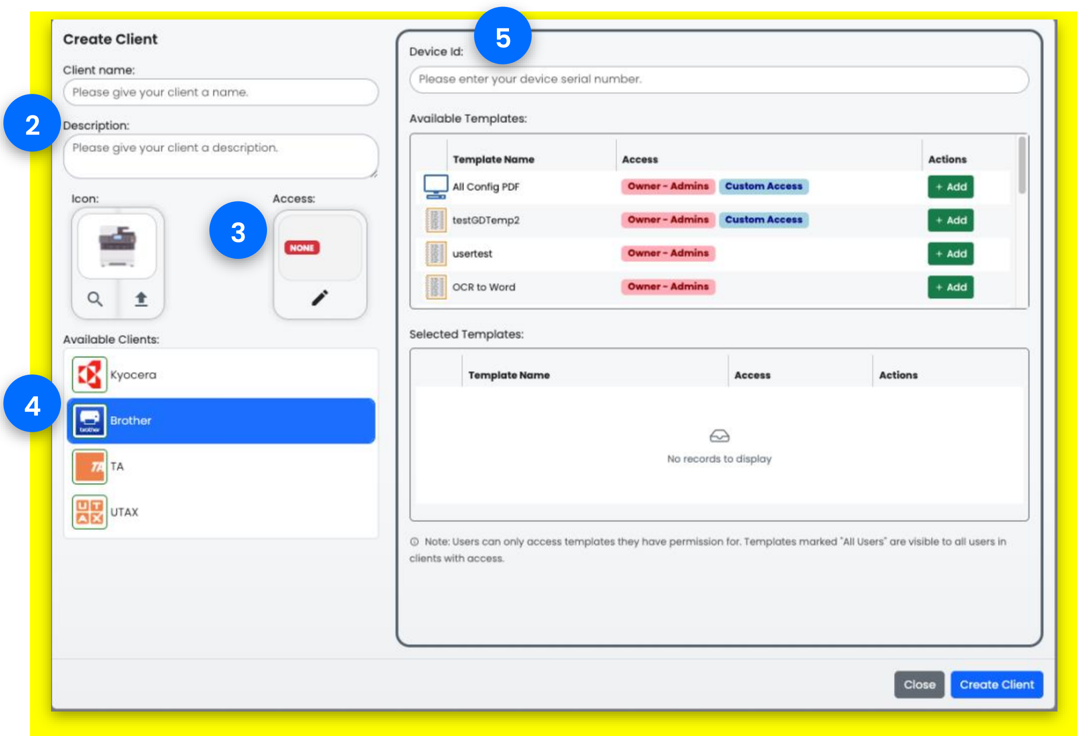
Each client card or list entry has:

- A **power icon** to enable/disable the client.
- A **star icon** to mark it as a favorite.

19.3 Creating a New Client

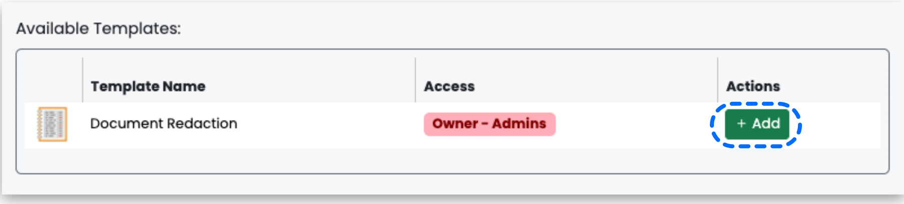


1. Click the **"New"** button.



2. Fill in the required information:
   - **Client Name**
   - **Description**
   - **Color Tag**
   - **Client Icon**
3. Choose the **Access Type** (defines how the client will access the system).
4. Select a **Client Type** from the available options.
5. Enter the **Device ID** (typically the **MFP serial number**):
   - Leave blank to **allow access from any device** of the selected type.

19.4 Assigning Templates to Clients



- After creating the client, assign templates by clicking the **"Add"** button from the list of available templates.
- Only assigned templates will be visible to users accessing the system through this client.

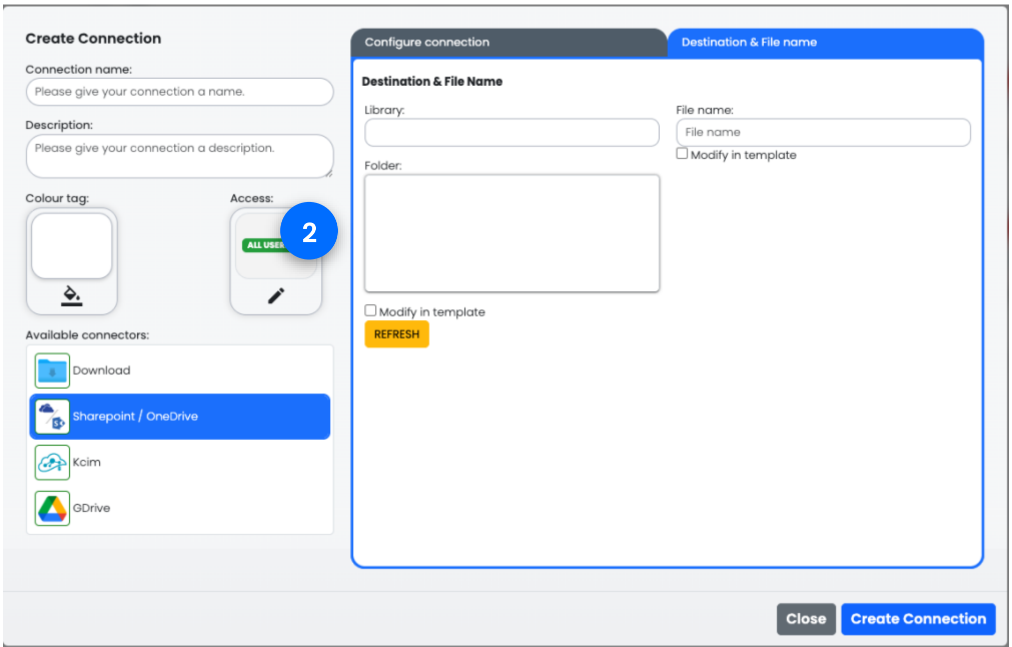
19.5 Editing and Deleting Clients

- **Edit:** Double-click a client card or list entry to modify its configuration.
- **Delete:** Click the **trash icon** on the client to remove it.

⚠

Note: Deleting a client will revoke all associated access and template assignments.

19.6 Granting Access



1. Open the Client.
2. Select the **Access** icon.
3. Click the **Edit** icon.
4. Assign access to:
    - Specific user groups, or
    - All users

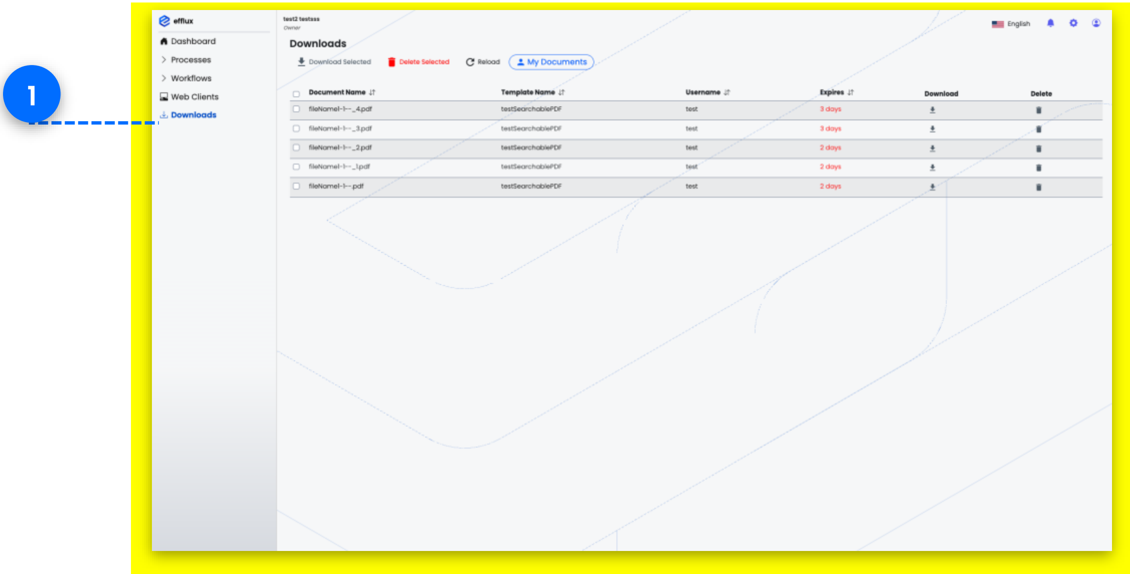
What Access Allows

- Users with access can **use the Client**, but **cannot modify it**.
- A user can only see Templates inside a Client **if they also have access to those Templates**.
- Admin users automatically have full access to all Clients and all Templates.

20. Downloads

The **Downloads** section allows users to access and retrieve processed documents. The availability and visibility of documents depend on the user's role and permissions.

Accessible from the **left menu → Downloads**.



20.1 Document Visibility by Role

- **Users:** Can only see and download documents they personally uploaded.
- **Admins:** Can see and download **all** documents.
- **Owners:** Have full access, same as Admins, with additional system permissions.

20.2 Download Options

Each available document is listed with:

- **Document name**
- **Status**
- **Expiry date**
- **Action buttons**

Individual Download

- Click the **Download icon** in front of each document to download it directly.

Bulk Download

- Use checkboxes to select multiple documents.
- Click the **"Download Selected"** button at the top to download them as a **ZIP file**.

20.3 Document Expiry and Deletion

- Each document is retained for **7 days** from the time it is processed.
- The **expiry date** is shown beside each item.
- Documents can also be **manually deleted** using the **trash icon** in front of each one.

⚠ **Note:** Once deleted or expired, the document cannot be recovered.

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Color Palettes:

#1C2B41	#09326C	#0055CC	#0C66E4	#1D7AFC
#388BFF	#579DFF	#85B8FF	#CCE0FF	#E9F2FF
#1D2125	#22272B	#2C333A	#454F59	#596773
#8590A2	#B3B9C4	#DCDFE4	#F1F2F4	#F7F8F9

006DFF