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# 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. Organization Registration

To begin using Efflux Cloud Capture (ECC), an organization must first register and request a dedicated instance of the platform.

#### **Steps to Register Your Organization:**

1. Visit the Registration Page Navigate to: <u>https://login.efflux-solutions.com/register</u>

← → ♂ ≒ login.efflu	solutions.com/ingister	※☆ □ 쇼   #
	( Park	
	Create an Organization Owner	
	Organization	
	Preferred Domain	
	Name	
	Institute	_
	Email address	
	Password	
	Phone number	
	Create Account	

- 2. Fill in Organization Details
  - Complete the registration form with your organization's information.
  - Choose a preferred domain name for your web application (e.g., yourcompany.efflux-solutions.com).
- Note: If the chosen domain is not appropriate or already in use, the ECC support team can assist with changes later.

### 3. Email Verification

- After submitting the registration form, you will receive a verification email.
- Click the link in the email to verify your address.

### 4. Instance Setup by ECC Support

- Once your email is verified, a request is sent automatically to the ECC support team.
- The team will create a secure instance of Efflux Cloud Capture for your organization.

### 5. Confirmation Email

- After the instance is successfully created, you will receive a confirmation email.
- You can now log in at your new domain using the email address and password you set during registration.

# 3. User Management

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

əfflux	Brian Young Owner	💷 tng 🧄 🜲 🗢 🗉 🗧 💳	English
ashboard	Dashboard	Uk ( Management	
Processes	Latest documents	Favorite templates Recent processes Longing	
Workflows	Document ↓î Template ↓î Owner ↓î	Template () Status () Type ()	User Management
/eb Clients		Invoice processing Active Invoice 2 total 2 User Manuals	Recovery Settings
ownloads	0	Delivery Notes Active Invoice Done in Progress Error	
	No records to display	Purchase Order Scanning Active Invoice Document Status User	Logging Settings
		Contract Reduction Active Invoice Test Barcode000.tif Strian.young@ub	license Details
		OCR Active Invoice 2.pdf Obian.younggub	
			User Manuals
		Inter a flenome     Ansee     C	In Progress Err

# $\textbf{Top Menu} \rightarrow \textbf{Settings} \rightarrow \textbf{User Management}$

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

#### 3.1 Add New User

🔗 efflux	٥
🛎 Home	Add New User
User Profile	
2. New User	Email Address
🛱 Pending Invitations	
# Active Users	User Type
# Temporary Users	Admin
	1: Add User

- 1. Click **"Add User"**.
- 2. Enter the user's email address.
- 3. Select the user type:

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

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**

🔗 efflux			
🛎 Home	Pendir	ng Invitations	
User Profile			
2 New User	Email	User Type	Actions
😨 Pending Invitations	chunglung.chan@ubunye.com	User	Resend
# Active Users			
# Temporary Users			

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)
- Deactivate a user's account
- **Reset passwords** for 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 <b>Upload</b> 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 <b>documents they uploaded</b> only
Download	Can download <b>only their own processed</b> 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 <b>User</b> role
Document Status	Can view the status of <b>all documents</b> uploaded across the organization
Download	Can download <b>all processed documents</b>
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 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  $\rightarrow$  User Profile.



#### **Profile Management Options**

Within the User Profile section, users can:

əfflux		
lome		
Iser Profile	U	ser Profile
lew User		
nding invitations	Personal Information	
Jsers	Email	User Type
sers	brian.young@ubunye.com	Owner
	Organization Name	Status
	Brian	Active
	First Name	
	Brian	
	Last Name	
	Young	
	Phone Number	
	123	
	Save Changes	
	Change Password	
	Current Password	
	Current password	
	New Password	Repeat New Password
	New password	Repeat new password
	Update Password	

View and edit personal details, including:
 – First Name

- Last Name
- Phone Number \_
- Change Password: ٠

  - Enter the current passwordEnter 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.

# 6. 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  $\rightarrow$  License Details.

	_	
	License Details ×	
	Organization: Brian (https://Brian.efflux-solutions.com) Ucense tapiny: %/2028	
	📦 Base License	
	Month Start Date Expiry Date Used Pages Total Pages Invoice Number	
	2026-05 5/4/2026 6/3/2026 0 250	
	2026-04 4/4/2026 5/3/2028 0 250	
	2026-03 3/4/2026 4/3/2026 0 250	
	2026-02 2/4/2026 3/3/2028 0 250	
	2026-01 1/4/2026 2/3/2026 0 250	
	2025-12 12/4/2025 1/3/2026 0 250	
	2025-11 11/4/2025 12/3/2025 0 250	
	2025-10 10/4/2025 11/3/2025 0 250	
	2025-09 9/4/2025 10/3/2025 0 250	
	2025-08 8/4/2025 9/3/2025 0 250	
	2025-07 7/4/2025 8/3/2025 0 250 2025-06 6/4/2025 7/3/2025 250 250	
	+ Add-on Licenses	
	Description Start Date Used Pages Total Pages Invoice Number	
	1000 Pages Add 6/16/2025 145 1000	

# **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.

# 1

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

# 7. 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  $\rightarrow$  Logging Settings.

	Logging Settings				×	
	Types Console logging	dd/mm/yyyy	dd/mm/yyyy			
	File logging	Date	Log			
	Logging level:		log20250624.txt	يك		
	Error		log20250625.txt	÷		
			log20250626.txt	لك		
		0	log20250627.txt	÷		
			log20250630.txt	÷		
	Past 1 V days Dow	nicod		Save Download Selecter		

### **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.

# 8. 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:



🔗 efflux 🐔 Dashboard	Brian Young Owner Dashboard		Epoin O User Management	🍨 👔 English 🌲 🔅
> Processes > Workflows ⊒ Web Clients ⇒ Downloads	Latest documents Decument if Template if Owner if  No records to display  Add new files  Add new files	Favorite templates Template Te	Recent processes 2 total Daw intragram Secured in the second s	v A. A. A. A. A. A. A. A. A. A.
	Clear all documents	Clear all answers	Ø Process	

#### 8.1 Backup Tab

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

Backup	Recovery	Reset
Download Ba	ckup	
Download a pass	sword-protected back	up of your system
Password		
Download Back	кир	
Note: Backups in password.	clude sensitive system co	nfiguration and data

#### 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.

# 8.2 Recovery Tab

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

	Backup	Recovery	Reset
Re Up	estore from	Backup o file, enter the passw	ord, and choose how
(	Choose File	No file chosen	
E	inter backup fi	le password	
F	Restore (overw	rite existing)	~
F	Restore Backup	•	
N	ote: This will ove	rwrite all existing data w	ith the backup. Make su

#### 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.

# 8.3 Reset Tab

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

Back	Recovery	Reset
Factor	/ Reset	
This will	erase <b>all data</b> . To proceed, t	ype reset below.
Type 'r	eset' to confirm	
Reset	ll Settings	
Warning	This will completely wipe all s	ystem data. This action is

#### What will be deleted:

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

# 

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

# **8.4 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.

# 9. 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**  $\rightarrow$  **User Management**  $\rightarrow$  **Temporary User** 

	🤣 efflux	
	<ul> <li>Home</li> <li>User Profile</li> </ul>	Note: The temp user is only intended for the ECC support team. With this user they will have full access to your instance except the User Management and Download sections.
and look	2 New User	Temporary User Management
Pending Invitations	Pending Invitations     Active Users     Temporary Users	Create a Temp User         Temporary Users           Volidity         No users.
😫 Active Users		30 Minutes V Generate User
😃 Temporary Users		

#### 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

#### 9.1 How to Create a Temporary User

Create a Temp User	
Validity	
30 Minutes	~
Generate User	

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

Create a Temp User	
Validity	
30 Minutes	~
Generate Us	er
Username	
temp-54de93d2	Сору
Password	
ReZSUhriTk	Сору
Create Temp	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.

# 9.2 Managing Temporary Users

Temporary Users		
Username	Expires In	
temp-6c2dc514	23 minutes	Delete
temp-54de93d2	23 minutes	Delete
temp-8dfece12	29 minutes	Delete

- 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

### **9.3 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.

# 10. 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.

# 10.1 Top Dashboard Cards

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

🤣 efflux	Brian Young Owner		📰 English 🌲 🔅 (
🖨 Dashboard	Dashboard		
V Processes			
Processing			
⊗ Error			
Processed			
✓ Workflows			
T Connections			
i≡ Picklists			
08 Templates			
🖵 Web Clients	1		2
🕹 Downloads	1.	ц <i>2</i> . Ц.	5.
	Add new files   Implice-303607011338.pedf 3728/2025 853718 AM +00001188517 bytes	Template         Wendle processing           Image: State of the	
	Clear all documents	Clear all answers	42 Process

### 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. Favorite Templates

• Shows a list of templates marked as favorites by the user.

### 3. Recent Process Summary

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

# 10.2 Upload Section (Bottom Card)

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

🤣 efflux	Bri	an Young								💼 Engli	sh 🌲 🔅 (
🖨 Dashboard		Dashboard									
V Processes		Latest document	0			Envorite templates			Recent processes		
Processing		Document \$↑	Template 🖨	Owner 🕼		Template ↓↑	Status ↓↑	Type↓↑	/ week processes	-	• •
③ Error		DeliveryNote-1.pdf	Delivery Notes	brian.young	+	Invoice processing	Active	Invoice	10 total		30
Processed		DeliveryNotepdf	Delivery Notes	brian.young		Delivery Notes	Active	Invoice		Done	In Progress Error
✓ Workflows		Deptol-May-2000-	tousies presseing	hulan unun a	-	Purchase Order Scanning	Active	Invoice	Document	Status	User
T Connections		Rental-May-7000	Invoice processing	ununyoung.	*	Contract Redaction	Active	Invoice	Invoice-20250629.pdf	•	brian.young@ub
i≡ Picklists		Rental-June-7000	Invoice processing	brian.young	*				Invoice-20250628.pdf	•	brian.young@ub
08 Templates		Rental-July-7000	Invoice processing	brian.young	<u>+</u>				Invoice-20250630.pdf	•	brian.young@ub
Web Clients									Invoice-20250629.pdf	•	brian.young@ub
Downloade									Invoice-20250628.pdf	•	brian.young@ub
		Invoice-2025070113 3/25/2025 8:57:18 A	<b>i39.pdf</b> M +00:00   188517 byte	18	×Ŧ	Invoice-July2025     Select a Nominal Cod     Select your option	8				
						3. Enter an invoice type					
		Up	load Oi	leue		Answer		Templai	te Selection		
		Clear all document	s			Clear all answers					S Process
						· •••••••					

#### 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.

# 11. 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".



### **11.1 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

Proce Click on	any job to see its history.				
From			То		
06/24/	2025		07/01/2025		C Reload
All: 8	Processing: 3 Error: (	Proc	eessed: 5		

# 

**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.

### 11.2 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.)



# **11.3 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.

# 12. 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

	🤣 efflux	Brian Young Owner			📰 English  🖡	0 ®
	f Dashboard	Templates				
	✓ Processes	E₄ New ⊕ Import	To edit, simply double click on the card.			
-	Processing	Eilter Ontions: (1)				
	⊗ Error			·		
	Processed		· · · · ·	👝 🕁 🔘		<b>☆ (0)</b>
	Workflows					
	T Connections	Invoice processing	Delivery Notes	Purchase Order Scanning	Contract Reduction	
	i≡ Picklists	E. 0 Ö	6.0 Č	E. D Ó	E	0 0
	🗕 🗖 🖓 Templates					
	🖵 Web Clients	👔 🗘 🖄				
2	🕹 Downloads	Patient Record				
		Highlighting				
						_

# **12.1 Template Views**

Templates can be displayed in two formats:

🤗 effux	Brian Young Owner		Settux	Brian Young Owner				
Doshboard	Templates		Doshboard	Templates				
✓ Processes	II. New 🗃 Import 🧮 (III) To edit, simply double sitch	on the cord.	> Processes	II+ New 🖃 Import	( To edit, simply double)	ble click on the cord.		
Processing     Error	Filter Options: 🕚 🖈 Type: All 🛞 Color Templote name	O Reset	<ul> <li>Workflows</li> <li>Connections</li> </ul>	Filter Options: 🕛 🛊 Type Al	Color Templet	te name	Ö Reset	
Processed		*	III Picklists	Template name 21	Color J?	Favorite J?	Active 2*	Type 21
~ Workflows		× • ((III)	St Templates	Invoice processing	•	*	0	Invoice
	Invoice processing Delivery Notes	Purchase Order	Web Clients	Delivery Notes	•	*	0	Invoice
III Picklists	0 D	5 P 2	ی Downloads	Purchase Order Scanning	•	*	0	Invoice
💯 Templates				Contract Reduction	•	*	0	Invoice
Web Clients				Patient Record Highlighting	•	合	۲	Invoice
	b							

**Card View** 

**List View** 

- Card View
- List View

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

Templates =+ New ⋺ Imp	port			Q	To edit, simply double click on the card.
Filter Options: (	IJ	*	Type:	All	S Color Template name

# **12.2 Filtering Templates**

Templates can be filtered using the toolbar by:

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

# 12.3 Creating a New Template

Templates (=+ New) ⊖ Ir	nport		=	To edit, simply double click on the card.
Filter Options:	(	*	Type: All	Color     Template name

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

Create Template	Workflow Questions	Processing	Output
Template name:	7		
Please give your template a name.		•	
Description:		(+) Click to add qu	uestion
Please give your template a description.			
h			
Colour tag: Icon: Access: All Users Q.			
emplate types:			
Intoice			
			Close Create Templa

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

Required	Question tag.		Any	~
Question defa	ult value.	Question tooltip.	1 1	~

#### 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

2 Selected	Question here.	
Required	Question tag.	Select picklist 🗸 🕱
Question toolt	ip.	

### **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

# **12.4 Advanced Processing Options**

		Worknow Question	Processing	oatput	
emplate name:		Output type:		OCR Language:	
Please give your template a name	)	Pdf		English	
escription:		PDF/A Standard:			
Please give your template a descr	iption.	None			
	h	Processes:			
colour tag: Icon:	Access:	Barcodes Detection	0 barcodes		Ð
			0 zones		Ð
emplate types:		Barcodes + Writing	0 Barcode Writing		Ð
Invoice	<u>∽</u>	Document Redaction	0 keyword highlights, 0 keyword r	naskings, 0 regex highlights, 0 regex maskings	Ð
		Image Processing	0 processing features		Ð
		Document Password	Disabled		÷
		Scan Settings			Ð

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		Page(s)	×
Codell		All	
Auto			
Metadata tag	Metadata		-[1D/2D]-PageNumber-[Index]
🗆 Split page			
Exclude page			

- 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

#### **Zone Detection**

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

Zone type	× Paae(s)
Ocr	All
Zone coordinate x 0 w 0	
Y O H O Test Zone	
Metadata tag	-PageNumber

- 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

elect a document Choose File file-example_PDF_500_k8.pc	1				
umbnails	Page 2			Zo	neZone
	In non mauris justo. Duis vehicula mi vei mi pretium, a vi est e ensi variula, il audie dui auctor. Duis pretium neg trossique. Donce atter est, bilandi si aurotor. Duis pretium neg trossique. Donce atter est, bilandi si aurot troisque (et scettrissigne fementium est, il posuere justo publica ut stobris. Sel ioborta rai ut esta efficient situation utores utoruns. Ut feditoria ettavia est auroto. En al utores utoruns. Ut feditoria ettaviano f. fraze viti veit. Federatore fementium risi vitae frogita venen maximus utorices. Cross fringilla ipsum magna, in frin a.	verra erat efficitur. C ue ligula, et publima Ul idi neque eget ti tichia publimar actu. P c. Tars le dress sed er usto mi, potttkor qui ae vestibulum velle. J ae vestibulum velle. S volutat. Vestibul atis. Etiam id mauri agilla dui com	ras aliquam ni placeat elerretosue matiguam natatu vel, elerretosua i e vegasas i e vegasas e vela orci	X V H	58 444 685 258
	Lorem ipsum	Lorem ipsum Lor	em ipsum		
	1 In eleifend velit vitae libero sollicitudin euismod.	Lorem			
	<ol> <li>Cras fringilla ipsum magna, in fringilla dui commod a.</li> </ol>	lo Ipsum			
	3 Aliquam erat volutpat.	Lorem			
	4 Fusce vitae vestibulum velit.	Lorem			
	5 Etiam vehicula luctus fermentum.	Ipsum			

- Use the **"Test Zone"** tool:
  - Upload a sample document
  - Draw the zone 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**  $\rightarrow$  click "Barcode Writing".
- 2. Click "Add Barcode Rule" and configure the following:

Barcode type	Page(s)
Codabar	All
Zone coordinate	
x 0 w 0	
Y 0 H 0 Preview Zone	
Barcode value Valido	Ite

- **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 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**  $\rightarrow$  **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

Keyword masking         Regex Highlight         Regex masking         Regex Highlight           Metadata	HighLight of Add keyv	color:	ADD
Processing Page number: [-1] ADD	No. ↓↑	Keyword ↓↑	Actions
Note: The zone may be detected on multiple pages. Please specify the page from which the zone should be read.			

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

# 3. Regex Masking

Keyword Keyword Regex Regex masking Highlight masking Highlight			
Regex Predefined Create	\D{2}	6}	ADD
Regular expression	<b>No.</b> ↓↑	Regex ↓↑	Actions
(\D{2}\d{6} Test string (\D{2}\d{6}	1.	\D{2}\d{6}	۲
			Close

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

# 4. Regex Highlighting

Predefined Create	HighLight c	olor: 🛑 x(s)	ADD
Insert your regular expression here	No. ↓↑	Regex ↓↑	Actions
est string			
Insert your test string here		No records to	display

- 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**  $\rightarrow$  **Image Processing**. Enables pre-processing options to clean and enhance document images. You can toggle the following tools:

Image Processing		×
Orientation		
Deskew		
Binarization		
Line Removal		
Dot Removal		
Smoothing		
Denoise		
Invert Text		
	1	
		Close

- 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  $\rightarrow$  Document Password.

Document Password	×
Metadota Default Question ([TEMPLATE_ID]) ([USER_ID]) ([DATE]) ([TIME]) ([DATETIME])	Password Password Password preview:
	Close

Protect the output document by setting a password:

Choose to:

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

• Manually enter a fixed password.

# 

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

# 12.5 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.

<u>ه</u>	+ Add Connector		
	`		

Pic	k a connection	
	Connection name ↓↑	Description ↓↑
	downloader	test
	Test-SP	test sp connection
	NewDownloader	
	Eva Test	
	testd	
		Close

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 taas
    - 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.

# 12.6 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.

# Â

**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

Templates =+ New ( ⊕ II	mport )	=	To edit, simply double click on the card.
Filter Options:	ٹ 🖞	Type: All	S Color Template name

- 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.

# 13. 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**  $\rightarrow$  **Workflows**  $\rightarrow$  **Connections**, this section allows users to manage destinations for document output.

	🤣 efflux	Brion Young Over
	f Dashboard	Connections
	✓ Processes	E_New III To edit, simply double click on the cord.
	Processing	Siltar Ontions: (1) the Convertion arma
	⊗ Error	
	Processed	
	- Vorkflows	
	= T Connections	Document Download SharePoint - Archive
	I≡ Picklists	ů ů
2	02 Templates	
	🖵 Web Clients	
	🕹 Downloads	
		Þ

# **13.1 Viewing Connections**

📀 effux	Brien Toung Doors Connections	efflux	Brian Toung Comme			
~ Processes	Ry New	✓ Processes	II <sub>4</sub> New (≣ :	1 To edit, simply double click on the card.		
Processing	Filter Options: 🕚 🛊 🛞 Color Connection name 🔿 Reset	Processing     Processing	Filter Options: 🕚 ★ 🜸	Osler Connection nome O Reset		
⊗ Error		⊘ Processed	Connection name 27	Calor 21 Paverite 21	Active if	Type IT
Processed		~ Workflows	Document Download	<b>•</b> \$	Ø	Download
Workflows	Document Download Sharehoint - Arthure	T Connections	ShanePoint - Archive	2 <b>•</b> •	0	Sharehoir
T Connections		II Picklists				
III Pickists		99 Templates				
Si remplates		-i- Downloads				
	t					
		_				_
	Card View		Lis	st 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.

# **13.2 Filtering Options**

Connections can be filtered by:

- Enabled/Disabled status
- Favorite
- Color Tag

### 13.3 Creating a New Connection

To create a new connection:

Connections (≡ <sub>+</sub> New)		( <b>E</b> ) <b>III</b> To e	dit, simply double click or	n the card.
Filter Options:	U	* © Color	Connection name	() Reset

- 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**

Create Connection	Destination & File name	
Connection name:		
Please give your connection a name.	Destination & File Name	
Description: Please give your connection a description. Colour tag:	File name: File name Modify in template	
Available connectors:		
Download SharePoint		
		Close Create Connection

- 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

Create Connection	Configure connection	Destination & File name
Connection name:	Authentication	
Please give your connection a name.	SharePoint	
Description:	Tengotid	
Please give your connection a description.	Tenantid	
	h. Clientid	
Colour tag:	ClientId	
	ClientSecret	
	ClientSecret	
<b>À.</b>	RedirectUri	
	RedirectUri	
Download	Test Connection 4	
SharePoint		

- 1. Provide a **connection name**
- 2. Provide **Description and Color tag** (optional)
- 3. Select the SharePoint connector under "Available Connectors"
- 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.

Create Connection	Configure connection	Destination & File name	
Connection name:	Protinging 6 File Manag		
Please give your connection a name.	Destination & File Name		
Description:	Library:	File name:	5
Please give your connection a description.		Modify in template	
	h Folder:		
colour tag:			
		-	
<u>\$.</u>	Modify in template		
vailable connectors:	REFRESH SP		
Download			
SharePoint			
			_
		Close Create Connec	ctio

- 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**.

### **13.4 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.

# 1

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

# 13.5 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.

# 14. 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**  $\rightarrow$  **Workflows**  $\rightarrow$  **Picklists**.



# **14.1 Viewing Picklists**



Picklists can be displayed in:

- Card View
- List View

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

# **14.2 Filtering Options**

You can filter picklists by:

- Enabled/Disabled status
- Favorite
- Color Tag

### 14.3 Creating a New Picklist

Picklists (≡ <sub>+</sub> New)		To edit, s	simply double click o	on the card
Filter Options:	U		Picklist name	() Reset

- 1. Click the "New" button at the top.
- 2. Enter the following details:
  - Name
  - Description
  - Color Tag

#### **14.4 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.

### 14.5 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.

# 15. 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**  $\rightarrow$  **Clients**.

	Owner		English 🐥 🗘
A Dashboard	Dashboard		
> Processes > Workflows	Latest documents Document 17 Template 17 Owner 17	Favorite templates Template 17 Status 17 Type 17	Recent processes
💳 💳 🚍 Web Clients		Document Reduction Active Invoice	6 total 👌 🚺 🌔
d Downloads	No records to display		Does         In Progress         Et           Decement         Status         Veer           1323 PS 72022 PC01 WK04.pdf         Extranspurge         Extranspurge           1323 PS 72022 PC01 WK04.pdf         Extranspurge         Extranspurge           Text Invoice (3).pdf         Extranspurge         Extranspurge
			Test Invoice (1).pdf brian.younge
		Please enter a filename     Answer     Repuired.	
		1. Proces enter a filename Answer wegeted	
	Chor al documents	Proces enter a filename     Anover     weyded      Citor all anovers	e Proc

# **15.1 Viewing Clients**

👌 effux	bian Young Ourse	effux	Brian Young Currer		
Doshboard	Web Clients	A Doshboard	Web Clients		
> Processes	E New E III to east, samply abuse cast on the card.	) Processes		spry double click on the cond.	
Web Clients	Filter Options: 🕐 🚖 Client nome 🔿 Reset	Web Clients	Filter Options: 🕚 🚖 Client nome	O Reset	
±. Downloads		± Downloads	Client name 21 P o	ddress i? Client type i?	Favorite 47
			Reception Kyocero MPP	Kyocero	\$
	Card View		List Vie	M/	

Clients can be displayed in:

- Card View
- List View

View type can be toggled from the top-right.

#### **15.2 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.

# 15.3 Creating a New Client

Web Clients (=+New)		=	To edit, simply c	double click on the card
Filter Options:	$\bigcirc$	*	Client name	() Reset

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

	Device	ə ld:		
Client name:	Pleas	se give your client Ip address (* f	or accepting all addresses)	
Piedse give your client à name.				
Description:	Availa	ble Templates:		
Please give your client a description.		Template Name	Access	Actions
Icon: 3 Acce	ss:	Document Redaction	Owner - Admins	+ Add
	Select	ed Templates:		
Q <b>†</b>		Template Name	Access	Actions
Available Clients:			₽	
Kyocera			No records to display	
Browse				
	© Note	e: If the client's access is set to "All Use	ers", only templates marked as accessible to	"All Users" will be visible to lower-
	users.			

- 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.

# **15.4 Assigning Templates to Clients**

Availabl	e Templates:		
	Template Name	Access	Actions
	Document Redaction	Owner - Admins	+ Add

- 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.

### **15.5 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.

# 16. 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**  $\rightarrow$  **Downloads**.

🤣 efflux	Brian Young Owner				💻 English	
A Dashboard	Downloads					
✓ Processes	Download Selected C Reload					
Processing						
⊗ Error	Document Name ३१	Template Name 🕸	Username ↓↑	Expires ↓↑	Download	Del
	DeliveryNote-Lpdf	Delivery Notes	brian.young@ubunye.com	7 days	<u>+</u>	1
✓ Workflows	DeliveryNotepdf	Delivery Notes	brian.young@ubunye.com	7 days	* /	1
T Connections	Rental+May-7000-Rent-Expensepdf	Invoice processing	brian.young@ubunye.com	7 days	<u>+</u>	ĩ
i≡ Picklists	Rental+June-7000-Rent+Expensepdf	Invoice processing	brian.young@ubunye.com	7 days	*	ĩ
08 Templates	Rental-July-7000-Rent-Expensepdf	Invoice processing	brian.young@ubunye.com	7 days	±	ĩ
🖵 Web Clients	IncomeSummary-8000-income-2026.pdf	Invoice processing	brian.young@ubunye.com	7 days	±	ĩ
14. Downloads	SalesRevenueSummary-1000-Sales Revenue-Income-2026.pdf	Invoice processing	brian.young@ubunye.com	7 days	<u>+</u>	ĩ

### 16.1 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.

### 16.2 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**.

# **16.3 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.



Efflux Cloud Capture User Manual

# Color Palettes:

#1C2B41	#09326C	#0055CC	#0C66E4	#1D7AFC
#388BFF	#579DFF	#85B8FF	#CCE0FF	#E9F2FF
#1D2125	#22272B	#2C333A	#454F59	#596773
#8590A2	#B3B9C4	#DCDFE4	#F1F2F4	#F7F8F9
	1		I	1
006DFF				