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Synappx Cloud Capture Guide.

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Synappx Cloud Capture Documentation Hub

Welcome

Use this hub to quickly jump into the SCC documentation area you need. Each section below links to a key child page, from getting started through to system administration.

Explore the guide

Choose a topic below to navigate straight to the information you need.

Start here • SCC: Getting Started • SCC: Home	**Core workflows** • SCC: Captures & Processes • SCC: Blueprints • SCC: Reports
Management • SCC: Users • SCC: Devices • SCC: Subscriptions	**Configuration** • SCC: Settings • SCC: System

SCC: Getting Started

Welcome to Synappx Cloud Capture

Synappx Cloud Capture is a cloud-based document capture and workflow solution that enables organisations to scan, process, and route documents securely to business applications and cloud storage platforms.

This guided onboarding experience helps administrators configure, validate, and deploy Synappx Cloud Capture for the first time with confidence.

NEW ADMIN ONBOARDING   5-STEP SETUP   GUIDED DEPLOYMENT

Goal: Get your environment ready, connect destinations, configure workflows, set permissions, and validate a successful first document capture.

Before You Begin

Pre-requisites

- Administrator access to the Synappx Cloud Capture tenant
- Access to your device network and supported MFPs
- Valid SCC licences for onboarding devices and users
- Knowledge of the cloud storage locations to be used for routing
- Awareness of your organisation's permission and retention policies

Environment checks

- Use a supported modern browser such as Microsoft Edge or Google Chrome
- Confirm stable internet connectivity for cloud communication and service activation
- Gather device details and user source information before starting

Requirement	What to confirm
Administrator access requirements	Use an account with permission to sign in, configure global settings, create workflows, and manage users or integrations.

Licensing requirements	Confirm that Synappx Cloud Capture licensing is active and aligned to your deployment scope and intended users.
Supported browsers	Use a current version of a supported browser such as Microsoft Edge, Google Chrome, Mozilla Firefox, or Safari where supported by your organisation.
Network and connectivity requirements	Allow secure outbound access to Synappx Cloud Capture services, identity providers, and connected cloud storage platforms.
Supported cloud storage platforms	Prepare destinations such as OneDrive, SharePoint, Google Drive, Dropbox, and other supported repositories used by your organisation.

If your organisation uses conditional access, MFA, proxy controls, or restricted APIs, validate those dependencies before configuring destinations and user access.

5-Step Setup Journey

What you will do

Connect devices, configure your cloud storage connections, and invite users.

Step	What to do	Estimated time	Guide
Step 1 – Access the Platform	Sign in to Synappx Cloud Capture and verify administrator access.	5 minutes	
Step 2 – Configure Storage Destinations	Connect cloud storage services such as OneDrive, SharePoint, Google Drive, Dropbox, or other supported destinations.	10 minutes	
Step 3 – Create Capture Workflows	Configure document capture workflows and define routing rules.	15 minutes	
Step 4 – Configure Users & Permissions	Create users, assign permissions, and manage access controls.	10 minutes	

Step 5 – Test & Validate	Perform a test scan and validate document delivery and workflow processing.	10 minutes	

Best practice: complete each step in order. This reduces setup issues and makes troubleshooting much faster if validation fails later in the process.

Troubleshooting

Use these common issue areas to quickly isolate deployment problems.

Issue area	What to check	Severity
Failed Scan Deliveries	Confirm destination availability, workflow routing rules, authentication validity, and target folder permissions.	HIGH
Authentication Errors	Check identity provider settings, MFA prompts, expired sessions, token consent, and admin account permissions.	MEDIUM
Destination Connection Failures	Validate endpoint access, API permissions, service account approval, and cloud storage configuration details.	HIGH
OCR Processing Issues	Review image quality, file format compatibility, workflow settings, and any document processing limits.	MEDIUM
Workflow Configuration Issues	Inspect routing rules, field mapping, trigger conditions, exception handling, and test inputs.	MEDIUM

If document delivery fails after workflow execution appears successful, the issue is often related to destination authentication, permissions, or folder path configuration.

Need Help?

Search the Knowledge Base

Find setup guides, troubleshooting steps, and best practices for administrators.

Use the AI Support Assistant

Get guided answers for configuration questions, common errors, and deployment tasks.

Raise a Jira Service Management ticket

Contact support when you need help with blockers, tenant issues, or unresolved errors.

> You're ready to begin. Start with **Step 1 – Access the Platform** and work through the setup journey to complete your first Synappx Cloud Capture deployment.

SCC: Home

The Home dashboard is the main landing page in Synappx Cloud Capture. It gives users a simple, at-a-glance view of capture activity, workload, and quick actions. The goal is to make the system easy to understand for everyone, whether you are a first-time user or a more technical administrator.

> This page explains what the Home dashboard is, what each widget does, and how users can use the dashboard to start work quickly and monitor capture activity with confidence.

What the Home dashboard is for

The Home dashboard is designed to show the most important information without overwhelming the user. Instead of presenting complex analytics, it focuses on the core things users need most:

- Understanding current capture activity
- Seeing whether any work needs attention
- Starting a new capture quickly
- Reviewing recent work
- Monitoring usage within the tenant

This makes the dashboard useful for both technical and non-technical users. A casual user can quickly upload a document or check recent work, while an administrator can monitor processing and usage across the environment.

> Think of the Home dashboard as a control center. It helps users answer simple questions quickly, such as *What is happening now?*, *What needs attention?*, and *What should I do next?*

Who this page is for

The Home dashboard supports different types of users:

- **General users** who want a simple place to upload documents and view recent captures
- **Administrators** who want visibility into activity, review queues, processing volume, and page usage
- **Tech-savvy users** who want fast access to operational information
- **Non-technical users** who need a clear and easy starting point

Even though some widgets are especially useful for administrators, the overall dashboard experience is intended to remain simple and approachable.

Available widgets

The stories in this epic define a focused set of dashboard widgets. Together, they provide a balanced view of capture operations and quick access to key tasks.

Widget	What it shows	Why it matters
Captured Documents	The total number of batches captured	Helps confirm capture activity across the tenant
Batch Requires Review	The number of batches waiting for review	Helps users identify work that needs attention
Batch Processing	The number of captures currently being processed	Provides real-time visibility into system activity
Captures Today	The number of batches processed today	Helps validate daily usage and recent activity
Capture Source	Capture activity by source	Intended to help users understand where captures are coming from
Quick Capture Upload	A fast way to upload documents from the dashboard	Lets users begin capturing with minimal clicks

	using drag and drop or file browsing	
Recent Captures	A list of the user's most recent captures	Makes it easy to return to recent work
Pages Used	Pages used compared with the subscribed page allowance	Helps administrators track consumption and avoid exceeding limits

Widget descriptions

Captured Documents

This widget shows the total number of batches that have been captured. It is a high-level activity indicator that helps confirm that capture work is taking place.

- Useful for administrators monitoring overall usage
- Useful for users who want a quick sense of capture volume

Batch Requires Review

This widget highlights how many batches are currently awaiting review. It helps users see when manual attention is needed.

- Useful for identifying pending work
- Helps prevent review tasks from being missed
- Especially valuable for admin and operational roles

> ✅ If this number is high, it may indicate that review work is building up and needs to be addressed soon.

Batch Processing

This widget shows captures that are actively being processed. It gives a live view of current system activity.

- Helps confirm that the platform is working on submitted captures
- Useful when users want reassurance that uploads are moving through the system

Captures Today

This widget shows how many batches were processed during the current day. It provides a quick daily snapshot of usage.

- Helpful for day-to-day monitoring
- Useful for validating that capture activity is happening as expected

Capture Source

This widget is intended to show where captures are coming from, such as different input channels or submission methods. Based on the epic, it is part of the planned dashboard experience, but the related story is still in the backlog.

- Expected to help users understand capture origin trends
- May be especially helpful for administrators analyzing intake behavior

Quick Capture Upload

This widget allows users to upload documents directly from the Home dashboard. Users can typically do this by dragging and dropping files or by browsing for files.

- Designed for speed and convenience
- Reduces the number of steps needed to start a capture
- Ideal for both technical and non-technical users

> ✅ This is one of the most user-friendly widgets on the dashboard because it turns the Home page into an immediate action point, not just an information page.

Recent Captures

This widget is intended to show a user's most recent captures so they can quickly return to work they performed recently.

- Helps users pick up where they left off
- Reduces time spent searching for recently submitted items

According to the current story status, this widget is blocked, so availability may depend on future delivery.

Pages Used

This widget shows how many pages have been used compared with the tenant's subscribed page allowance. It is mainly an administrative monitoring tool.

- Helps track consumption over time

- Supports proactive planning before page limits are reached
- Useful for managing subscription usage responsibly

> ⚠️ Users responsible for tenant management should check this widget regularly to avoid unexpected page limit issues.

How users may use the dashboard

Most users will interact with the Home dashboard in one or more of these ways:

1. **Check the current situation**
   Review widgets such as Batch Processing, Batch Requires Review, and Captures Today to understand what is happening now.
2. **Take quick action**
   Use Quick Capture Upload to submit documents directly from the Home page.
3. **Return to recent work**
   Use Recent Captures, when available, to reopen or reference recent capture activity.
4. **Monitor usage**
   Use Captured Documents and Pages Used to understand system usage and tenant consumption.

Summary

The Synappx Cloud Capture Home dashboard is a simplified, high-value landing page that brings together the most useful information and actions in one place. Its widget set is intentionally focused: it helps users see capture activity, identify items needing review, start uploads quickly, revisit recent work, and monitor page consumption. This makes the dashboard practical, easy to understand, and useful for both technical and non-technical audiences.

SCC: Captures & Processes

The **Captures & Processes** area is where you run document extraction, track progress, and review results. It is the main working area of Synappx Cloud Capture. You can use it to process files one time with a ad-hoc capture, or set up a process that runs automatically on a schedule handling documents from connected input sources such as cloud folders or email.

What this area does

- Lets you upload files for ad-hoc processing.
- Lets you create automated processes that monitor input sources and run on a schedule.
- Shows the status of batches as they move through extraction and review.
- Helps reviewers focus on low confidence fields that need attention.
- Supports notifications and reviewer assignment for process driven batches.
- Saves extracted results to the configured output location.

Before you start

- Make sure you have at least one published **Blueprint** available.
- Check that the Blueprint has an input source, output format, output location, and field setup completed.
- If you plan to use automated processing, make sure your input source is connected and accessible.
- If review is part of your workflow, confirm the correct reviewer has been assigned.

What you can see in this area may depend on your role, your assigned reviewer access, and the locations connected to your Blueprints and processes.

Captures and Processes at a glance

Area	What it is for	Best used when

Captures	Run a one-time batch by uploading files manually and review the results	You need to process files now
Processes	Create an automated job that checks a source and runs repeatedly	You want documents handled automatically
Batch Review/Data Validation	Check and correct extracted data before completion when confidence is low	You need to validate results

Output files and folders

After a capture or process finishes, the extracted data is sent to the output location saved in the Blueprint.

- Output can be generated in formats such as CSV, XML, or JSON, depending on the Blueprint setup.
- For some workflows, you can choose to create a new folder for each batch.
- When folder creation is used, files are grouped together and named consistently.
- You can use the output location action in the Captures list to view where results were saved.

Best practices

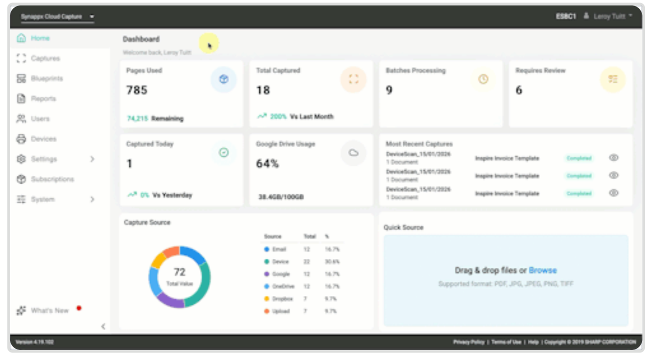
- Use clear names for batches and processes so they are easy to find later.
- Choose the correct Blueprint before running a capture.
- Set reviewers only when manual validation is genuinely needed.
- Use notifications for important automated processes so the right people know when runs finish.
- Review low-confidence fields promptly to keep work moving.
- Delete old or unused processes to keep the area tidy.

SCC: Captures

SCC: Captures List

The **Captures** tab is the default view when you open the Captures. It shows batches that have been created and processed in the system.

1. Open the **Captures** area from the navigation menu.
2. Review the list of captures shown on screen.
3. Use the **search bar** to search by name.
4. Use column sorting to sort capture by **name**.



What you will see

The Captures list gives you a summary of each batch so you can quickly understand what has been captured, where it came from, and whether it needs review.

- **Batch Name** – the name used to identify the capture batch.
- **Captured By** – the user or process that created the capture.
- **Blueprint** – the Blueprint used to extract information from the documents.
- **Capture Source** – where the documents came from, such as an uploaded file or connected input source.
- **Extraction Status** – shows the current processing stage, so you can see whether extraction is in progress, complete, or needs attention.
- **Overall Confidence** – shows how confident the system is in the extracted data, where available.

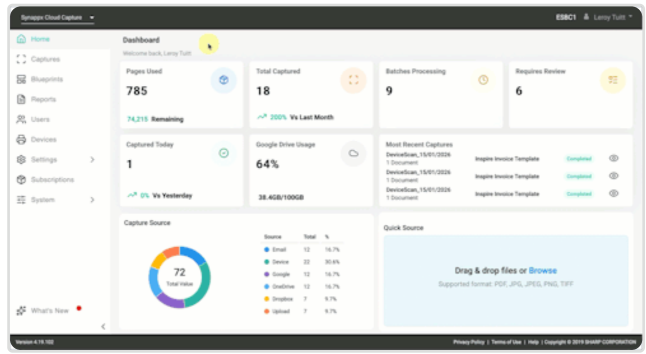
- **Validation Progress** – shows how much of the batch has been reviewed or still needs checking.
- **Actions** – options to review the batch or view output location details.

> **Tip:** If a capture shows low confidence or incomplete validation progress, open the batch review area to check and confirm the extracted information before it is finalised.

SCC: Create a Capture

Ad-hoc capture is ideal when you have files on your device and want quick processing without setting up an automated process.

1. Open the **Captures** tab.
2. Select **New Capture**.
3. Enter a **Batch Name**.
4. Select the published **Blueprint** you want to use.
5. Review the Blueprint summary, such as confidence threshold, saved fields, and output location.
6. If available and needed, choose **Create Folder** to place output files into a new folder.
7. Drag and drop files or browse for files to upload.
8. Select **Run** to begin processing.



What to know about ad-hoc captures

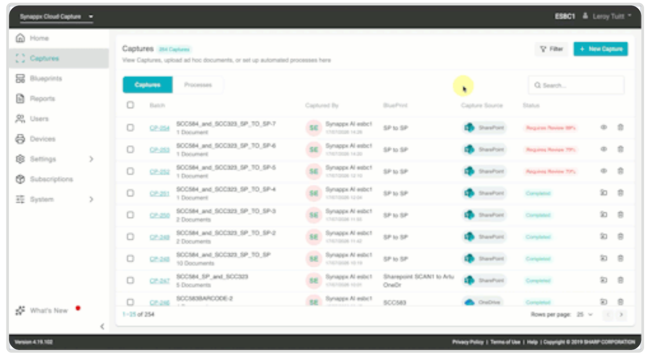
- You can upload one or more files in a single batch.
- The system processes the uploaded files in the background.
- The selected Blueprint controls how the data is extracted and where the results go.
- If folder creation is enabled, generated files are grouped together in the output location.
- Once complete, the batch appears in the Captures list for tracking and review.

SCC: Review a Batch

Batch Review is where you check extracted values and correct anything that needs attention. This is especially useful when a field falls below the confidence threshold set in the Blueprint.

How to open review

1. Go to the **Captures** tab.
2. Find a batch with **Extraction Status** set to completed.
3. Select **View** icon against a Batch.



What happens in review

- The screen is split into two panels.
- The left side shows the original document.
- The right side shows extracted fields in tabs such as **Needs Review**, **Reviewed**, and **All Fields**.
- If any fields are below the threshold, the review screen opens on **Needs Review** by default.
- Selecting a field helps you focus on the matching part of the document.
- Your changes are auto-saved as you work.

Confidence thresholds help reviewers spend time only where it matters. Low confidence fields are surfaced first so you can work faster.

How to review a batch step by step

1. Open the batch from the Captures list.
2. Start in **Needs Review** to see the fields that most likely need attention.

3. Compare the extracted value with the document preview.
4. Update any incorrect values.
5. Move through the documents in the batch using the review controls.
6. Complete the review when all required checks are finished.

What to know about reviewing

- Each document is locked when a user opens it for review.
- This prevents two people editing the same document at the same time.
- If a document is already in use, another user cannot edit it until it is released.
- If all documents in a batch are currently in use, the system lets you know.
- When you close, move on, or complete your review, the document lock is released.

How notifications and reviewers work

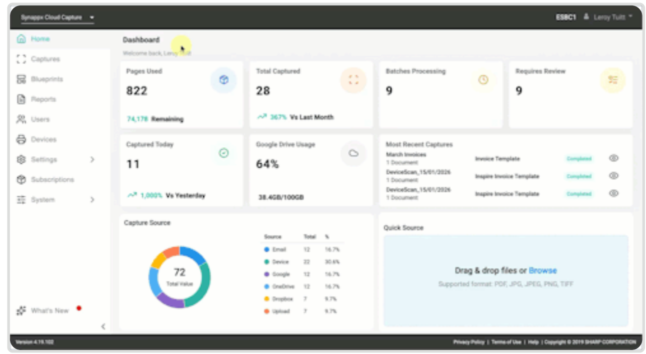
- Notifications can be sent when a scheduled process finishes.
- Notification content can include the process name, run time, files processed, result summary, and a link to review the batch.
- A process can have a single reviewer or multiple reviewers.
- With a single reviewer, one person is responsible for review.
- With multiple reviewers, any assigned user can complete the review.

> Access to review may be limited to the assigned reviewer, the creator, or administrators, depending on how your organisation uses the feature.

SCC: Processes

SCC: Processes List

The **Processes** tab is for recurring, automated capture jobs. A process checks a connected input source and runs using the Blueprint you selected.



1. Open the **Captures** area from the navigation menu.
2. Click the Processes tab.
3. Review the list of processes list shown on screen.
4. Use the **search bar** to search by name.
5. Use column sorting to sort process by **name**.

What you will see

- **Process Name** – the label used to identify the process
- **Blueprint** – the Blueprint linked to the process
- **Processing Mode** – how often the process runs
- **Notify Users** – users who receive completion updates
- **Reviewers** – the user or users responsible for review
- **Last Modified By** – who last updated the process

SCC: Create a Process

A process is an automated capture setup. Instead of uploading files manually, you choose a Blueprint, select how often the process should run, and let the system monitor the connected input source for new documents.

1. Open the **Captures & Processes** area.
2. Select the **Processes** tab.
3. Click **+ New Process**.
4. Enter a **Name** for the process.
   This is a required field and is used to identify the process and its batches.
5. Select a **Blueprint** from the dropdown list.
   The list shows the Blueprints available to you.
6. **Process Mode**
   - **Real-time** for immediate automatic processing when documents arrive.
   - **Daily** to run once each day.
   - **Weekly** to run on a weekly schedule.
   - **Monthly** to run on a monthly schedule.
7. If you selected **Daily**, **Weekly**, or **Monthly**, enter the **Start Date/Time** and **End Date/Time**.
   These dates must be valid and cannot be in the past.
8. Optional: choose users in **Notify Users** if certain people should receive notifications about the process or its review activity.
9. Optional: choose one or more **Reviewers** if you want to control who can review the batches created by this process.
10. Click **Save**.

✅ When the form is completed correctly, the process is saved and appears in the Processes list with the details you entered.

What happens after you save

- The new process appears in the **Processes** list.
- The system uses the selected Blueprint to process matching documents from the connected input source.
- New batches are created automatically when the process runs.
- If reviewers were assigned, review access can be limited to those users and administrators.

Reviewers and notifications

You can leave these fields blank, but they are helpful when you want tighter control over review work.

- **Single reviewer:** one specific user is assigned to review batches created by the process.
- **Multiple reviewers:** more than one user can be assigned. Any one of them can complete the review.
- **After completion:** once one reviewer completes the batch review, the batch is no longer open for the remaining reviewers.
- **Administrators:** administrators can still see and interact with all batches.

✏️ If your organisation uses reviewer assignment, only the assigned reviewer or reviewers may be expected to complete validation for batches created by that process.

Process modes explained

Mode	How it works	Best for
Real-time	Monitors the input source and starts processing when new documents arrive.	Incoming documents that need fast turnaround.
Daily	Runs once per day within the scheduled period you set.	Regular daily document handling.
Weekly	Runs on a weekly schedule within the date range you set.	Lower-volume document collections.
Monthly	Runs on a monthly schedule within the date range you set.	Periodic processing such as month-end activity.

SCC: Edit or Delete a Process*

You can open an existing process to update its details, such as name, schedule, notification users, or reviewers. If a process is no longer needed, it can be deleted to stop future automated runs.

1. Open the **Processes** tab.
2. Find the process you want to change.
3. Use the available action to **Edit** or **Delete**.
4. Save your changes or confirm deletion.

Deleting a process stops future automated fetching and processing for that setup. Only remove a process when you are sure it is no longer needed.

SCC: Blueprints

The Blueprints area is where you create and manage document extraction rules in Synappx Cloud Capture. A Blueprint teaches the system how to read a document, what information to look for, and where the processed results should go. This helps automate document processing, reduce manual work, and improve consistency.

What you can do in Blueprints

Use the Blueprints area to build document processing setups for common document types such as invoices, receipts, and general documents.

- Create a new Blueprint from a sample document
- Choose a document type that matches your document
- Link the Blueprint to an input source
- Select an output format such as XML or CSV where available
- Choose an output location for processed results
- Map fields you want Synappx Cloud Capture to extract
- Rename fields to match your business needs
- Set confidence thresholds for review
- View and manage your existing Blueprints

How Blueprints work

A Blueprint is created using a sample document. During setup, you define how the system should interpret that document. After the Blueprint is configured, Synappx Cloud Capture can use it to identify and extract the same kinds of information from similar documents in the future.

A simple way to think about a Blueprint is this: it is a set of instructions that tells the system what a document looks like, what data matters, and what to do with that data after extraction.

Input side

- Sample document

Output side

- Extracted document fields

- Selected document type
- Connected input source
- Selected output format
- Connected output location

Blueprints area at a glance

When you open the Blueprints area, you can view existing Blueprints and select one to manage or update. This area acts as your library for document automation setups.

Function	What it does	Why it matters	Guide
Blueprint list	Shows available Blueprints in one place	Makes it easier to find and manage your document setups	SCC: Blueprint List
New Blueprint	Starts the process of creating a Blueprint from a sample file	Lets you teach the system how to process a document type	SCC: Create a Blue print
Blueprint Designer	Lets you configure fields, mappings, formats, and thresholds	Controls how data is extracted and handled	SCC: Configure a Bl ueprint
Publish Blueprint	Transitions a Blueprint from the draft state to the published state	Allows the Blueprint to be used in processes and ad-hoc captures.	SCC: Publish a Blue print
Delete Blueprint	Removes unused draft or published Blueprints where available	Helps keep the library organised	

Before you start

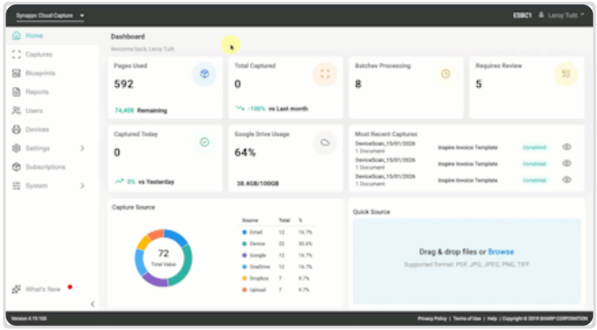
- Make sure you can sign in to Synappx Cloud Capture.
- Setup Input Sources and Output Locations for a smoother Blueprint creation process.

All actions in **Blueprints** are role-based and only applicable to **Admins**.

SCC: Blueprint List

The Blueprints page displays all Blueprints in your organisation as a sortable list.

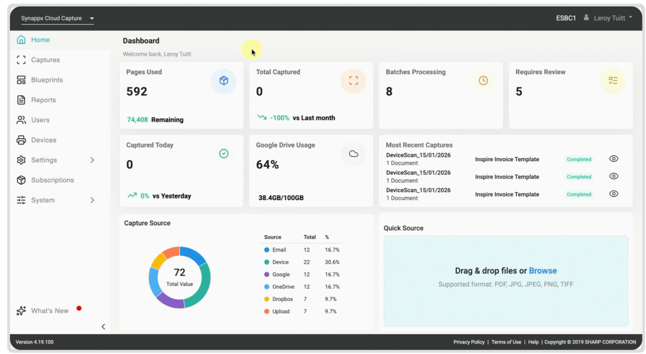
1. Open the **Blueprint** area from the navigation menu.
2. Review the list of blueprints shown on screen.
3. Use the **search bar** to search by name.
4. Use column sorting to sort blueprints by **name**.



SCC: Create a Blueprint

Creating a Blueprint usually starts with a sample document that represents the type of file you want Synappx Cloud Capture to process.

1. Open the **Blueprints** area.
2. Select **New Blueprint**.
3. Select a **Document Type** that best matches your document, such as invoice, receipt, or general document.
4. Upload a sample document file.
5. Click create.
6. The Blueprint Designer will launch, where you can continue to configure fields and behaviour.



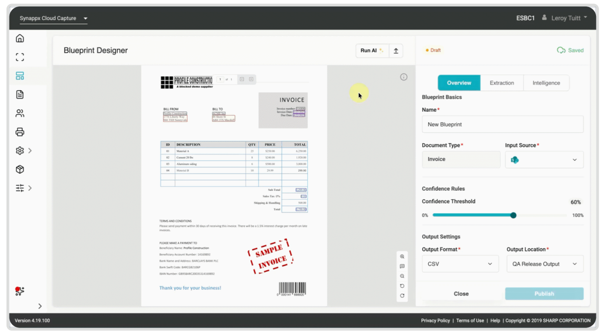
Tip: Use a clear name that helps other users understand the Blueprint straight away, such as *Accounts Payable Invoices* or *Store Receipts*. Ensure to choose a document that is clear, complete, and representative of the files you expect to process most often. If the sample is poor quality or unusual, the resulting Blueprint may be less reliable.

SCC: Configure a Blueprint

> The Blueprint Designer is where you define exactly what information should be extracted and how the system should treat it.

How to configure a Blueprint in the Designer

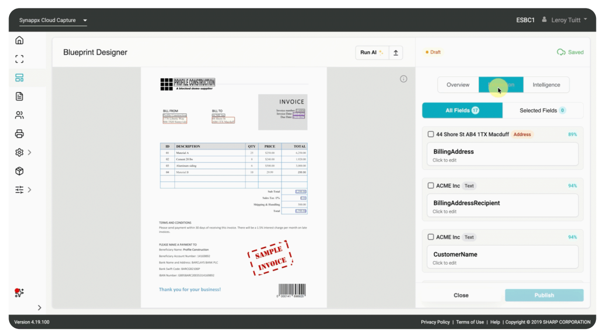
1. Open the **Blueprints** area.
2. Select the Blueprint you want to finish setting up.Review the uploaded document preview.



Blueprint Basics Tab - Details

Blueprint Basics

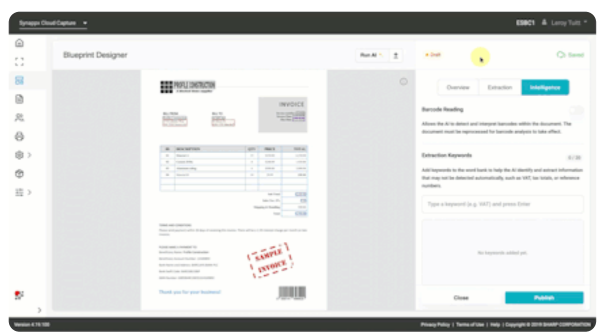
1. Specify a name for the Blueprint, Input Source, Output Format and Output Location.
2. Set a confidence threshold for the Blueprint.



Extraction Tab - Field Mapping

Extraction

1. Select the fields you want to extract, such as invoice number, date, total amount, or supplier name.
2. Map each field to the correct part of the sample document.
3. Rename fields if you want them to match your business system or preferred naming style.
4. Check the displayed field type, such as text, date, or currency.



Intelligence Tab

Intelligence

1. Enable bar coding or provide keywords to Synappx Cloud Capture to detect.

Review the setup before final use.

Auto-save: The Blueprint Designer includes auto-save behaviour so your changes are preserved as you work.

Field mapping

Field mapping tells the system which pieces of information to extract from the document. For example, on an invoice you may want the invoice number, invoice date, tax amount, and total amount.

- **Select fields for extraction:** Choose the information that matters to your process.
- **Rename fields:** Adjust field names to match your internal systems or reporting rules.
- **Check field types:** Confirm whether a field is text, date, currency, or another supported type.

Confidence thresholds

A confidence threshold helps control when a document should be reviewed before final processing.

- If extracted data meets or exceeds the threshold, it can continue through the process.
- If a field falls below the threshold, it can be flagged for manual review.
- Flagged batches are routed to the Data Validation area for checking before completion.

Use care with threshold settings: A threshold set too high may create more review work. A threshold set too low may allow uncertain data through. Start with a sensible balance and adjust based on results.

How to use input and output settings with Blueprints

Each Blueprint connects to an input source and an output destination.

- **Input source:** This is where documents come from, such as an email inbox or cloud storage folder.
- **Output format:** This defines how extracted data is exported, such as XML, CSV, or JSON where supported.
- **Output location:** This is where processed files and extracted data are stored.

Before creating a Blueprint, make sure the input and output locations you need have already been set up in the platform.

> **Access note:** Some Blueprints may only be visible to users who have access to the related input or output locations.

Intelligence

The Intelligence section helps the Blueprint improve how information is detected during document processing. Use these options when you want the system to look for barcodes or give it extra keywords to guide extraction.

Barcode reading toggle

This toggle enables barcode detection during processing. This feature is turned off by default, re-running the AI maybe required if the setting changes after a document has already been analysed.

Extraction keywords

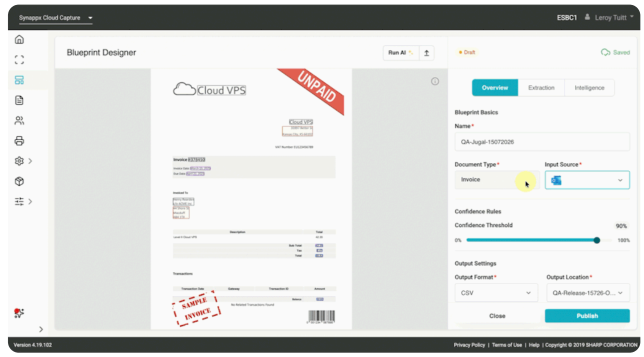
Add keywords (type + Enter) up to a limit of 20 words at which Synapp AI will search specifically for these words in the document. Duplicate or empty entires are denied. A re-run of the AI is required if keywords change after analysis.

> **Note:** Re-running the AI may consume several page credits depending on the page count of your document.

SCC: Publish a Blueprint

Publishing a Blueprint makes it ready to be used in live document processing. In simple terms, a **Draft** Blueprint is still being set up, while a **Published** Blueprint is the version you want Synappx Cloud Capture to use.

How to publish a Blueprint



1. Open the **Blueprints** area.
2. Select the Blueprint you want to finish setting up.
3. Review the configuration in the Blueprint Designer.
4. Check that the Blueprint has the correct input source and output location.
5. Choose the output format you want to use, such as **CSV** or **XML**.
6. Review your mapped fields and any Intelligence settings, such as barcode reading or extraction keywords, if used.
7. Select **Publish**.
8. If a confirmation message appears, review it and confirm to continue.

Tip

Before publishing, use a sample document that is clear, complete, and typical of the documents you expect to process. This helps improve extraction quality.

What happens after publishing

- The Blueprint becomes available for live use.
- It can be selected and used in document processing workflows.
- The published setup is treated as the active configuration for that Blueprint.

- Users with access to the related input and output locations can see and use it.

Draft vs Published

State	What it means	Typical use
Draft	The Blueprint is still being created or updated.	Testing, reviewing, and finishing configuration.
Published	The Blueprint is ready for live processing.	Active use in Capture processes and document automation.

Important things users should understand

- Publishing is the point where a Blueprint moves from setup into active use.
- If a Blueprint is published with incorrect settings, it may affect how documents are processed.
- Published Blueprints may also become linked to live items such as batches or processes.
- Because of that, published Blueprints are handled more carefully than drafts.

> **Important**
> A published Blueprint may be harder to remove if it is already associated with batches or processes. In those cases, deletion can be blocked to protect live processing.

What publishing does not do

- It does not replace the need to review your field mapping and settings carefully.
- It does not automatically fix poor sample documents or incomplete setup.
- It does not make the Blueprint visible to users who do not have access to its connected locations.

> **Tip:** Use a clear name that helps other users understand the Blueprint straight away, such as *Accounts Payable Invoices* or *Store Receipts*. Ensure to choose a document that is clear, complete, and representative of the files you expect to process most often. If the sample is poor quality or unusual, the resulting Blueprint may be less reliable.

SCC: Reports

Reports are designed mainly for administrators and other authorised users who need visibility into usage and performance. Standard users may see fewer options depending on their access level.

This guide explains what the Reports area is, what information you can expect to see, and how to use it in simple steps.

What you can do in Reports

- View user activity information
- Review overall system usage and document throughput
- Check which input sources and output locations are most active
- Identify recent activity trends
- Use reports to support monitoring, auditing, and operational review

Report function	What it shows	Why it is useful
User Activity Report	User-level processing activity, including document and page counts and recent activity	Helps you understand who is using the system and how often
System Usage Report	Overall platform throughput, processing trends, and source or destination activity	Helps you monitor performance and spot bottlenecks or unusual patterns

Before you start

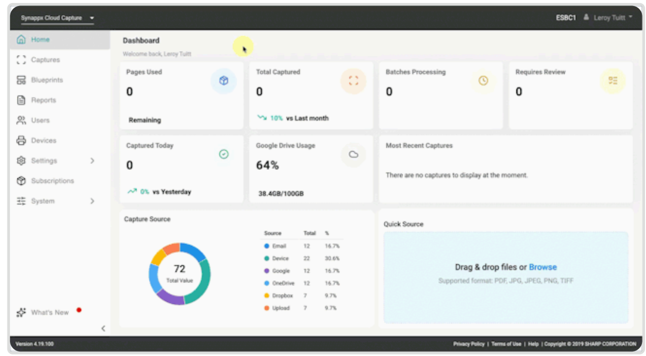
- You must be signed in to Synappx Cloud Capture.
- Your organisation may limit Reports access based on role.
- Some export or visibility options may only be available to administrators.

If you do not see the Reports area, or if a report appears to be missing, contact your administrator for access confirmation.

SCC: Reports List

Open the Reports area

1. Sign in to Synappx Cloud Capture.
2. Open the main navigation menu.
3. Select **Reports**.
4. Click the ‘play’ icon against the report you want to view.



If your organisation has permission-based access, the reports you see may differ from another user’s view.

SCC: User Activity Report

This report is useful if you want to see adoption levels, identify your most active users, or review recent activity.

What you may see in this report:

- Total documents processed
- Most active user
- Number of admin users and tenant users
- User name and role
- Documents processed
- Pages processed
- Most recent activity

Example uses:

- Check whether users are actively processing documents
- Identify users who may need support or training
- Review activity for internal audit or operational checks

Understand the report data

Reports are designed to make activity easier to read, even if you are not technical.

- **Summary metrics** give you a quick overview of the most important numbers.
- **Tables or lists** let you compare users, sources, or destinations side by side.
- **Recent activity values** help show what has happened most recently.
- **Usage trends** help you understand whether activity is increasing, decreasing, or staying steady.

A good starting point is to review the summary first, then look deeper into the detailed rows only if you need more context.

SCC: System Usage Report

Use this report when you want to understand overall processing volume, peak usage, or which input and output connections are being used most often.

What you may see in this report:

- Total documents processed
- Average documents processed per hour
- Average documents processed per day
- Peak throughput user
- Most active input source
- Activity by input source
- Activity by output location

Example uses:

- Monitor daily or hourly processing trends
- Spot high-volume periods
- Understand which sources are used most
- Support planning, troubleshooting, or operational reviews

Understand the report data

Reports are designed to make activity easier to read, even if you are not technical.

- **Summary metrics** give you a quick overview of the most important numbers.
- **Tables or lists** let you compare users, sources, or destinations side by side.
- **Recent activity values** help show what has happened most recently.
- **Usage trends** help you understand whether activity is increasing, decreasing, or staying steady.

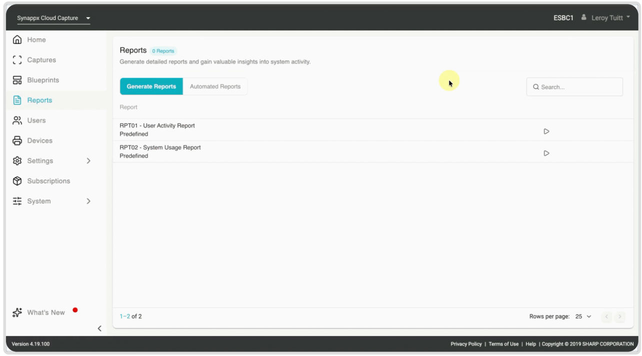
A good starting point is to review the summary first, then look deeper into the detailed rows only if you need more context.

SCC: Exporting Reports

Export formats may include:

- Excel
- PDF

How to export a report:



1. Click the ‘play’ icon against the report you want to export.
2. Specify a date range and select your preferred file format.
3. The file will automatically be downloaded in your desired format.

> Export options may depend on your role and what your organisation has enabled.

SCC: Users

The **Users** area is where administrators manage who can access Synappx Cloud Capture. From this area, admins can view users, add new users, update display names, and control whether a user can sign in. This guide explains the main user-related functions in simple steps.

What the Users area is

The Users area is the central place for managing user accounts in Synappx Cloud Capture. It helps administrators keep access up to date and make sure the right people can use the platform.

- **View users** in a searchable, paginated list
- **Add users** individually, in groups, or by CSV import depending on the available method
- **Edit a user** to update the display name shown in the platform
- **Activate or deactivate users** to control whether they can access the system
- **Delete users** when they no longer need access and are not blocked by dependencies

What you can do in Users

Function	What it does	What to know	Guide
User List	Shows all users in a searchable and sortable table	Includes name, email, role, and status	SCC: Users List
Add Users	Adds new users to the tenant	Can include CSV import, identity provider search, and multi-user selection	SCC: Add Users
Edit User	Updates the display name of an existing user	Changes are local to Synappx Cloud Capture and do not sync back to directory services	SCC: Edit a user
Activate or Deactivate	Controls whether a user can access the platform	Inactive users cannot sign in or use platform features	SCC: Activate or Deactivate Users

Delete Users	Removes users who no longer require access	Deletion can be blocked if the user is still needed in captures or processes	SCC: Delete Users

Before you start

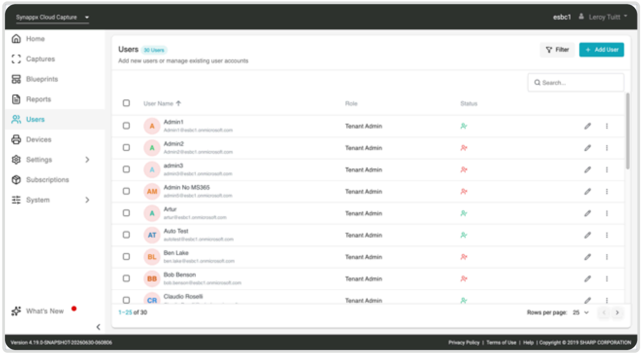
- Make sure you can sign in to Synappx Cloud Capture.
- Open the **Users** area from the left-side navigation.
- If you need to add or remove users, make sure you have the right permissions for your organisation.

All actions in **Users** are role-based and only applicable to **Admins**.

SCC: Users List

The **Users** page is your central directory for managing people in Synappx Cloud Capture. From here, you can view user accounts, search for specific users, and manage access to the platform.

1. Open the **Users** area from the navigation menu.
2. Review the list of users shown on screen.
3. Use the **search bar** to search by name or email.
4. Use column sorting to sort users by **name**.
5. Move through pages if there are more users than fit on one page.

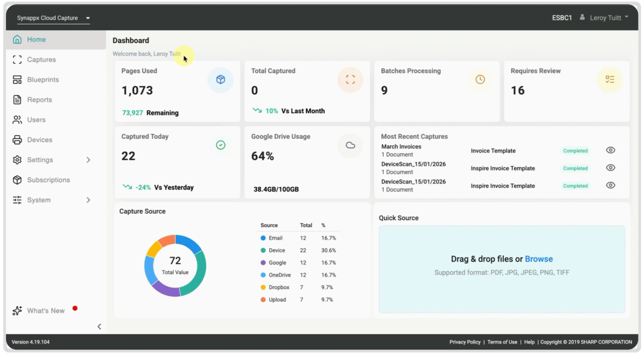


The list is designed to be easy to scan and includes these fields: **Name, Email, Role, Status**

SCC: Add Users

> The **Add Users** page explains the different ways administrators can add users to Synappx Cloud Capture. Depending on your environment, you can add users from your connected identity provider or import multiple users using a CSV file.

Add users from your identity provider (IDP)

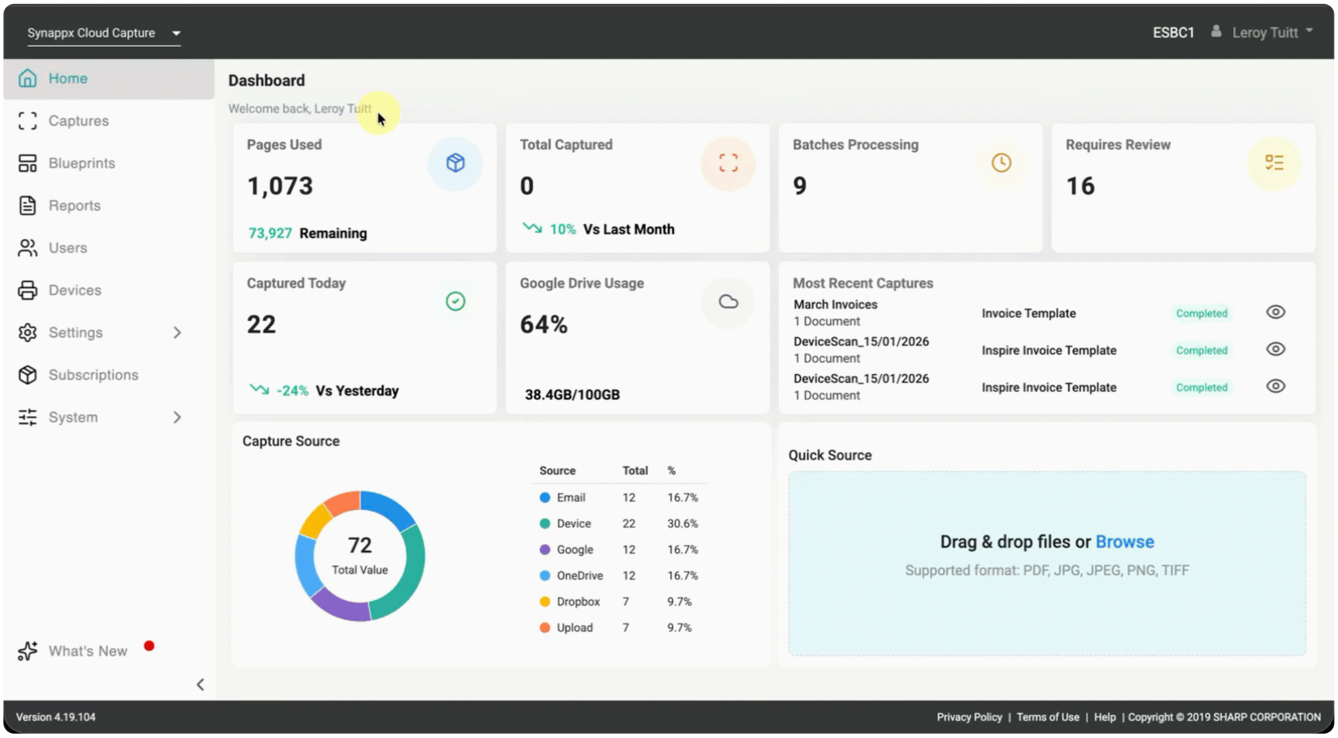


1. Open the **Users** area.
2. Select the option to **Add User**.
3. Choose the tab or option to import from your connected directory or identity provider.
4. In the search field, start typing the user name.
5. Add each required user from the search results.
6. Review the selected users shown in the window.
7. Remove any user you added by mistake.
8. Choose whether the users should be active immediately if the checkbox is available.
9. If the **Activate Users** checkbox is shown, decide whether the user should be active immediately.
10. Click **Save**.

After saving, the system confirms the action and the users are added to the platform.

> **Important**
> If the **Activate Users** checkbox is selected, the new user is added as active. If it is cleared, the user is added as inactive and will not be able to access the platform until activated later.

Import users by CSV



This option allows administrators to upload a CSV file to add users in bulk.

1. Open the **Add User** window.
2. Select the **Import via CSV** tab.
3. Choose the CSV file from your device.
4. Review the import before saving if prompted.
5. Click **Save** to complete the import.

After the upload finishes, the platform shows the result of the import.

> ⚠️ **CSV format note**
>
> The import file must match a supported CSV structure. Some exported formats from directory services may differ. If your upload fails, check that you are using the correct CSV format for your environment.

SCC: Edit a user

Administrators can update a user’s display name if the name shown in Synappx Cloud Capture needs to be corrected.

1. Open the **Users** area.
2. Find the user you want to update.
3. Click the **Edit** icon.
4. Update the display name.
5. Click **Save**.

After saving, the platform shows a confirmation message.

Important

Changes made here update the display name shown in Synappx Cloud Capture only. They do **not** sync back to Active Directory, Microsoft Entra ID, Google Workspace, or another connected identity provider.

SCC: Activate or Deactivate Users

The **Activate or Deactivate Users** allows administrators to manage user access to Synappx Cloud Capture by activating or deactivating user accounts.

Deactivate a user

1. Open the **Users** area.
2. Find the user in the list.
3. Open the user options menu.
4. Click **Deactivate User**.
5. Confirm the action if prompted.

Once deactivated, the user can no longer log in or use Synappx Cloud Capture features.

What happens after deactivation
The user’s previous data and history stay in the system, but the user loses access until they are activated again.

Activate a user

1. Open the **Users** area.
2. Find the inactive user.
3. Open the user options menu.
4. Click **Activate User**.

Once activated, the users access to Synappx Cloud Capture and its features is reinstated.

SCC: Delete Users

The **Delete Users** allows administrators to remove one or more users from Synappx Cloud Capture.

Delete a user

1. Open the **Users** area.
2. Find the user you want to remove.
3. Click the delete option for that user.
4. Review any warning or dependency message.
5. Confirm the deletion.

Delete multiple users

1. Open the **Users** area.
2. Select the users you want to remove.
3. Choose the bulk delete action.
4. Review the results for each selected user.
5. Confirm the deletion.

SCC: Devices

This guide explains the **Devices** area in Synappx Cloud Capture and how users can use it. To keep the content easy to read, this page acts as the **parent page** and includes a short overview plus recommended **sub-pages** for each device function. The Devices area helps you view, add, update, and remove supported multifunction printers (MFPs) connected to your Synappx Cloud Capture tenant.

What the Devices area is for

The Devices area is where you manage the printers and MFPs linked to your organisation in Synappx Cloud Capture. From here, users can see registered devices and, depending on their role and the available function, add new devices, update basic details, or remove devices that are no longer needed.

- **For everyday users:** it provides a clear list of devices connected to your organisation.
- **For admin users:** it provides tools to add, edit, and delete devices.
- **For technical users:** it includes device details such as device type, IP address, and registration information.

What users can do in Devices

Function	What it does	Who it helps	Guide
Device List	Shows all registered devices in one place, with useful columns and actions.	All users	SCC: Device List
Add Device - Direct Connect	Generates a secure URL that can be copied into the device to register it.	Admins setting up supported devices	SCC: Add a Device with Direct Connect
Add Device - Manual Connect	Lets you enter device details manually and save the device to your tenant.	Admins comfortable entering device details	SCC: Add a Device with Manual Connect

Edit Device	Lets you update the device name and location.	Admins maintaining device records	🖨SCC: Edit a Device
Delete Devices	Removes one or more devices that are no longer needed.	Admins	🖨SCC: Delete Devices

Before you start

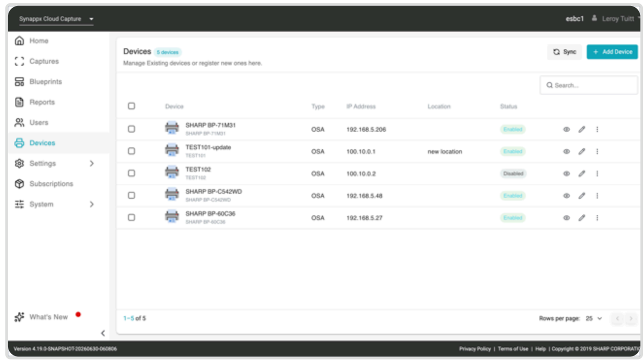
- Make sure you can sign in to Synappx Cloud Capture.
- Open the **Devices** area from the left-side navigation.
- If you need to add or remove devices, make sure you have the right permissions for your organisation.
- Have the device information ready if you plan to use **Manual Connect**.

⚠ Some actions are role-based. For example, deleting devices is intended for **Tenant Admins**.

SCC: Device List

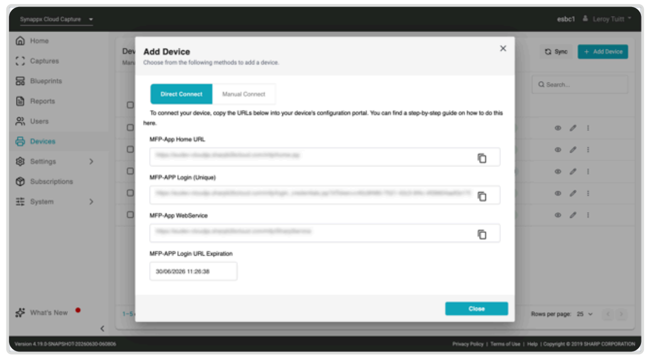
The **Devices** page gives you a complete view of every device linked to your organisation. From here, you can check Cloud Capture status, manage device settings, and quickly access actions for each device.

1. Select **Devices** from the side navigation to open the Devices page. The page should match the approved Figma design.
2. The device list is shown in a table with columns for **Device**, **Operating System**, **IP Address**, **Location**, **Cloud Capture Features**, and **Actions**.
3. The **Device** column shows the device name and model. By default, the list is sorted A-Z by Device.
4. The **Operating System** column shows whether the device uses ESF or OSA, and the **IP Address** and **Location** columns help identify where the device is installed.
5. The **Cloud Capture Features** column shows whether Cloud Capture is Enabled or Disabled for each device.
6. Use the **Actions** column to open Quick View, edit a device, or select the ellipses menu ⋮ for more options.
7. From the ellipses menu, choose **Enable** or **Disable** depending on the current Cloud Capture status, or choose **Delete** to remove the device from the list.
8. All table columns can be sorted to help users find the right device quickly.



SCC: Add a Device with Direct Connect

Direct Connect is the quickest way to add an MFP to your Synappx Cloud Capture tenant. Copy the required connection URLs from the Admin Portal, enter them into the device's application settings, and the MFP will register automatically with your organisation.



1. **Open the Add Device modal** – On the Devices page, click **Add Device**. The modal opens with the **Direct Connect** tab selected by default.
2. **Copy the URLs** – The modal displays three read-only URL fields:

   Click the **Copy** icon next to each URL to copy it to your clipboard.
   - **MFP-App Home URL**
   - **MFP-App Login URL**
   - **MFP-App Web Service URL** – This is a unique, auto-generated link specific to your tenant. It refreshes automatically every 30 minutes; the expiration countdown is shown beneath it.
3. **Configure the MFP** – On the MFP's admin website, navigate to the OSA application setup and paste each URL into the corresponding field.
4. **Restart the MFP** – After saving the configuration, restart the device. The MFP will register itself with SCC and appear automatically in your Devices list.
5. **Close the modal** – Click **Close** to return to the Devices page.

Things to note

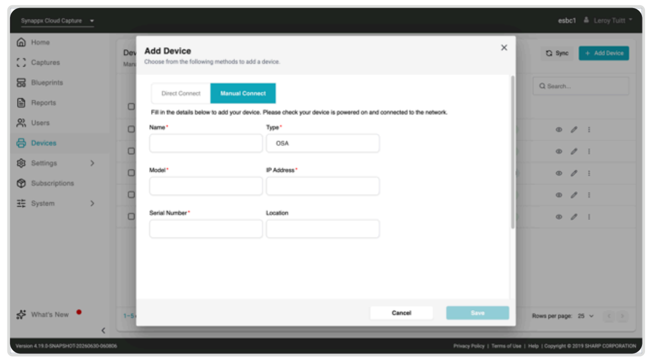
- The Web Service URL expires and regenerates every **30 minutes**. Make sure you use it before it expires; if it does, simply copy the new one.
- Each MFP must be added to SCC separately (even if it already exists in SCP).
- You cannot edit the URLs — they are generated automatically for your tenant.

> ⚠ If the URL expires before you finish setup, copy the latest URL shown in the Direct Connect window and use that one instead.

SCC: Add a Device with Manual Connect

Manual Connect lets you add an MFP to your Synappx Cloud Capture tenant by entering its details manually. Once the device information has been saved, Synappx Cloud Capture will connect to the MFP and add it to your organisation.

1. **Open the Add Device modal** – On the Devices page, click **Add Device**. The modal opens with two tabs: Direct Connect and Manual Connect. Select the **Manual Connect** tab.



2. **Complete the device details** – Fill in the following fields:
   - **Name**
   - **Type**
   - **Model**
   - **IP Address**
   - **Serial Number**
   - **Location**
3. **Save the device** – Once all mandatory fields are completed, the **Save** button becomes active. Click **Save** to register the device. It will appear immediately in your Devices list.

   To exit without saving, click **Cancel**.

Things to note

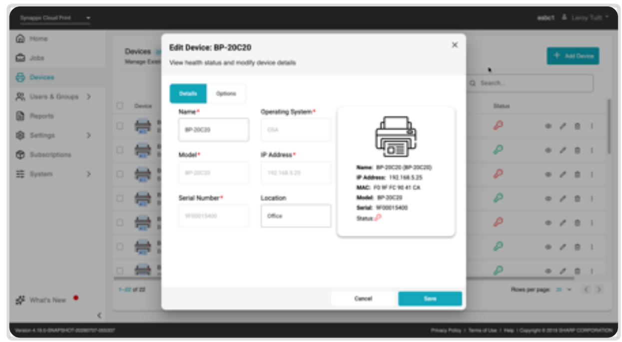
- The **Save** button remains disabled until all mandatory fields are filled in.
- Input is blocked once the character limit is reached — you won't be able to type beyond the maximum.
- Each field displays an inline character counter (e.g. *3/50*) so you can see how many characters remain.
- The IP Address field only accepts numbers and full stops; other characters are rejected.
- If an invalid IP format is entered, an "Invalid format" message will display.

- After adding the device, you may need to **restart the MFP** for it to fully register and allow user sign-in (this depends on additional licensing configuration).

SCC: Edit a Device

The **Edit Device** window lets you update editable information for a device registered in your Synappx Cloud Capture tenant, including its name and location.

1. **Open the Edit Device window** – In the Devices list, click the **Edit (pencil) icon** next to the device you want to update. The Edit Device window will open.
2. **Update the editable fields** – Only the following fields can be changed:
   - **Name**
   - **Location**



All other device details are read-only.

3. **Review the Summary section** – The window also displays a read-only summary with the following device details:
   - **Name**
   - **IP Address**
   - **MAC Address**
   - **Status**
4. **Save or cancel** –
   - Click **Save** to persist your changes.
   - Click **Cancel** to close the window without saving.

Things to note

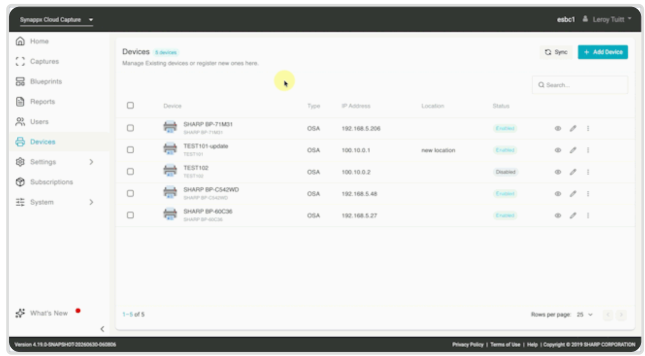
- Only **Name** and **Location** can be edited; all other fields (IP Address, MAC Address, Status) are displayed for reference only.
- Changes take effect immediately after clicking Save.
- A **Popular Users** section (based on SCC usage statistics) is planned for a future release but is not currently shown.

SCC: Delete Devices

Use the **Delete Devices** feature to remove devices that are no longer needed from your Synappx Cloud Capture tenant. This page explains how to delete individual devices or multiple devices at once.

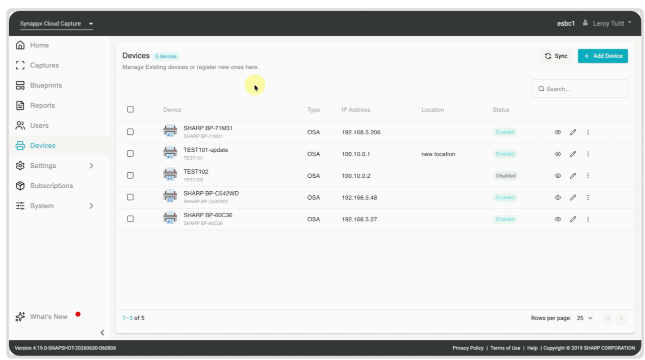
Single delete

1. Open **Devices**.
2. Find the device you want to remove.
3. Select the delete option for that device.
4. Review the confirmation message.
5. Confirm deletion.



Bulk delete

1. Open **Devices**.
2. Select the checkboxes for one or more devices.
3. Use the bulk delete action.
4. Review the confirmation message.
5. Confirm deletion.



- Only **Tenant Admins** can delete devices.
- After deletion, the device list refreshes automatically.
- A deleted device can no longer use Synappx Cloud Capture features.

Delete only devices that are no longer needed.

SCC: Settings

The **Settings** area is where administrators manage tenant-wide security and system options in Synappx Cloud Capture. It is used to control how users authenticate at supported devices and, where applicable, keep shared authentication settings aligned across connected Synappx products.

What Settings is for

Use Settings to manage the rules that affect your whole tenant rather than one document, batch, or Blueprint. In this area, you can:

- Choose which authentication methods are available at supported MFP devices
- Control whether PIN login, card login, or both can be used
- Turn two-factor authentication on or off
- Set the required PIN length for your tenant
- See whether changes are being synced to Synappx Cloud Print when both products are used together

Before you start

- You may need administrator access to open or change Settings
- If your organisation uses both Synappx Cloud Capture and Synappx Cloud Print, some authentication settings may sync between the two products
- Changes made here can affect how users sign in at devices across your tenant

Only make changes in this area if you understand their impact. Authentication changes can affect all supported devices linked to your tenant.

Open the Settings area

1. Sign in to Synappx Cloud Capture.
2. Open the main navigation.
3. Select **Settings**.
4. Open the **Security** or **Authentication** section if it is shown as a tab.

When the page opens, you will see the authentication options available for your tenant.

What you will see

- **PIN Login –** a toggle that controls whether users can sign in with a PIN
- **Card Login** – a toggle that controls whether users can sign in with a registered access card
- **Two-Factor Authentication –** a toggle that requires both card and PIN when enabled
- **PIN Length** – a setting that lets you choose the required number of digits for tenant PINs
- **Sync Status** – an indicator that shows whether changes are syncing to Synappx Cloud Print

> ℹ If you hover over the sync status indicator, you may see a short message confirming whether syncing is in progress or completed.

What each feature does

PIN Login

PIN Login lets users sign in at supported devices using a numeric PIN. It is enabled by default. If PIN is the only active sign-in method, it cannot be turned off until another method is enabled.

Card Login

Card Login lets users sign in using a registered card. You can enable card login on its own or use it alongside PIN login. If card login is the only active method, it cannot be turned off until another method is enabled.

Two-Factor Authentication

Two-factor authentication adds an extra layer of security. When enabled, users must authenticate with **both** card and PIN. Access is denied if either part fails.

PIN Length

This setting controls how many digits a tenant PIN must contain. Supported PIN length is between **4** and **6** digits.

Sync Status

If your organisation uses both Synappx Cloud Capture and Synappx Cloud Print, shared authentication settings can sync across products. The sync status indicator helps you understand whether the latest changes are still syncing or have finished syncing.

Shared PIN across products

Where both products are used together, a user PIN can be kept consistent across Synappx Cloud Capture and Synappx Cloud Print. This means a user can use one PIN across both systems when sync is supported and active.

Shared card across products

Where both products are used together, a registered card can also be kept consistent across both systems. This helps users access either product with the same card, reducing duplicate setup.

SCC: How to Use Settings

Enable or disable PIN Login

1. Open **Settings**.
2. Find the **PIN Login** toggle.
3. Switch it on to allow PIN authentication, or off to stop using PIN authentication.

If the toggle cannot be turned off, another authentication method may need to remain active first.

Enable or disable Card Login

1. Open **Settings**.
2. Find the **Card Login** toggle.
3. Switch it on to allow card authentication, or off to stop using card authentication.

If the toggle is unavailable, it may be the last enabled authentication method.

Turn two-factor authentication on or off

1. Open **Settings**.
2. Find the **Two-Factor Authentication** setting.
3. Switch it on if users must sign in with both card and PIN.
4. Switch it off if you want users to sign in with one allowed method instead.

> ℹ When two-factor authentication is enabled, users must successfully complete both checks. A valid card without the correct PIN, or a valid PIN without the correct card, will not allow access.

Change the PIN length

1. Open **Settings**.
2. Find the **PIN Length** setting.
3. Select or enter the required PIN length.
4. Choose a value from **4** to **6** digits.

Use a shorter PIN for easier use, or a longer PIN for stricter security.

Check whether settings have synced

1. Make your change in **Settings**.
2. Look for the **Sync Status** indicator.

3. Wait for the status to show that syncing has completed.
4. Hover over the status indicator if you want to read the message.

You may see messages such as:

- **Syncing changes to Synappx Cloud Print**
- **All changes synced to Synappx Cloud Print**

Important behaviour to understand

- **At least one authentication method must always stay enabled.** You cannot turn off both PIN and card login at the same time.
- **Changes apply at tenant level.** This means they affect supported devices and users across your organisation.
- **Shared settings may be read-only in some cases.** If your organisation uses both products and your role does not allow changes in the linked product, you may be able to view settings but not update them.
- **PINs and cards are intended to stay unique within the tenant.** This helps prevent conflicts and keeps user access consistent.

> If you use both Synappx Cloud Capture and Synappx Cloud Print, a setting may be blocked from editing if your account does not have the required admin rights in the connected product.

Best practice

- Keep at least two administrators informed before changing authentication rules
- Use two-factor authentication for higher-security environments
- Choose a PIN length that balances security and ease of use
- After making changes, confirm the sync has completed before asking users to test sign-in
- If your organisation uses both products, keep the user experience simple by maintaining shared PIN and card access where possible

SCC: Subscriptions

The **Subscriptions** area gives you a simple view of your product licensing information. It is mainly a read-only page designed to help administrators understand what has been purchased, what is currently in use, and what capacity remains available. This area is mostly informational. In Synappx Cloud Capture, you will usually use this page to check subscription details rather than make changes.

What this area is for

Use the Subscriptions area to:

- view your current subscription information for the product you are using
- check how much licensed capacity is available
- understand how much capacity is already assigned or active
- review total purchased page packs or licences, depending on the product

Although the exact metrics differ by product, the overall experience is the same across both products: the page presents subscription information in a clear, visual layout for quick review.

What you will see

When you open the page, you will see subscription summary information for the current product.

Area	What it shows
Subscription summary cards	Key product metrics shown in a clear visual format.
Product-specific totals	The overall amount purchased for that service, such as page packs or licences.
Usage breakdown	A simple view of what is active, assigned, inactive, or remaining, depending on the product.

The page shows details for the product you are currently viewing. It is intended to help you understand that product's subscription, not to manage every service from one screen.

How subscriptions work in each Synappx Cloud Capture

Product	Main subscription information shown
Synappx Cloud Capture	Subscription information focuses on page pack totals, including the total page pack amount available for the tenant.

Understanding the information shown

For Synappx Cloud Capture

In Cloud Capture, the important figure is the **Total Page Pack**.

- This is the accumulated number of pages purchased by the tenant for the duration of the licence.
- If additional page packs are purchased, this total increases accordingly.
- This helps administrators understand the overall capture capacity available to their organisation.

SCC: System

The **System** area helps administrators review important platform activity through logs. It is mainly a read-only area used for monitoring, checking history, and exporting records when needed.

> In Synappx Cloud Capture, the System area is used to **view log information**. It is not a workspace for processing documents or changing capture settings.

What the System area is for

The System area gives administrators visibility into recorded platform events. It helps with:

- checking what has happened in the system
- reviewing administrative activity
- tracking changes over time
- supporting troubleshooting, compliance, and internal review
- exporting log data for offline review or sharing

This area mostly displays information. In normal use, you will spend your time searching, filtering, reviewing, and exporting logs rather than editing anything.

What you will see

Depending on your access, the System area includes two log views:

- **Admin Logs** – records administrative actions and account-related activity
- **System Logs** – records system-level events and messages that help show what is happening in the platform

The exact data shown can vary depending on your role, your tenant, and what activity has taken place in the system.

Area	What it shows	Typical use
Admin Logs	Administrative actions, user-related operations, and other admin events	Check who performed an action and when
System Logs	System events and platform messages	Review technical or platform activity for support and investigation

What information a log entry can contain

Each log entry is designed to help you quickly understand an event. A row may include details such as:

- **Date and Time** – when the event happened
- **Actor** – the user connected to the action, where available
- **Action Type** – what happened, such as created, updated, or deleted
- **Area** – the part of the product affected
- **Before Value** – the previous value, if a change was made
- **After Value** – the new value after the change

Some entries may include more detail than others. For example, one entry may simply show that an action happened, while another may also show what changed before and after.

How to open the System area

1. Sign in to Synappx Cloud Capture.
2. Open the left navigation menu.
3. Select **System**.
4. Choose the log view you want to review, such as **Admin Logs** or **System Logs**.

If you are looking for a specific event, start with the log that best matches the type of activity you want to review.

How to use the logs

Most users will use this area in a simple review flow:

1. Open the correct log view.
2. Look at the newest entries first.
3. Use filters or search to narrow the list.
4. Open or expand entries if more detail is available.
5. Export the results if you need a copy.

How to search and filter

The logs are designed to help you find information quickly. You may be able to refine the list using tools such as:

- **date range filters** to focus on a specific period
- **search** to find a keyword, name, or related text
- **user filters** to focus on actions by a particular person

When available, filtering helps reduce long log lists into something easier to review.

> If you are unsure where to start, first filter by date, then search by a name or keyword related to the event you want to find.

How to read a log row

When reading a row, work from left to right:

1. Check **when** it happened.
2. Check **who** performed the action, if shown.
3. Check **what action** took place.
4. Check **which area** was affected.
5. Review any **before** and **after** values to understand the change.

This makes it easier to understand not only that something happened, but also what changed.

How to export logs

If you need to store, share, or review records outside the platform, you can export log results.

1. Open the log view you want.
2. Apply any filters you need.
3. Select **Export**.

4. The file is exported in **CSV** format.
5. Open the downloaded file in your preferred spreadsheet application.

> Export is useful when you need to review a larger set of entries, keep a record for audit purposes, or share results with another team.

What this area does not do

- It does not manage captures or processes.
- It does not change blueprint settings.
- It does not fix errors directly.
- It is not usually used for day-to-day document work.

Instead, it helps you understand platform activity by showing recorded information.

Best practice

- Use logs when you need traceability or history.
- Filter before exporting so your file is easier to review.
- Check both Admin Logs and System Logs if you are investigating a wider issue.
- Use recent entries first when troubleshooting a new problem.

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