TOSHIBA | elevate sky WORKFLOW

END USER GUIDE

Elevate Sky® Workflow

Stop doing more.
Start doing what matters.

How to use this guide.

This manual is designed for end users of Elevate Sky® Workflow, providing step-by-step instructions and best practices to help you navigate and maximize the platform's features.

Let's make work just *flow*.

Table of Contents

What is Elevate Sky® Workflow

Workflow is a cloud-based platform that allows end users to seamlessly **capture** documents, **process** key data, and **route** them to their destination—quickly and effortlessly.

Application Architecture

This application consists of the Elevate Sky® Workflow Web Platform (Login Page and Workflow Execution Page), and the Toshiba MFP Embedded Application, which runs directly on the MFP.
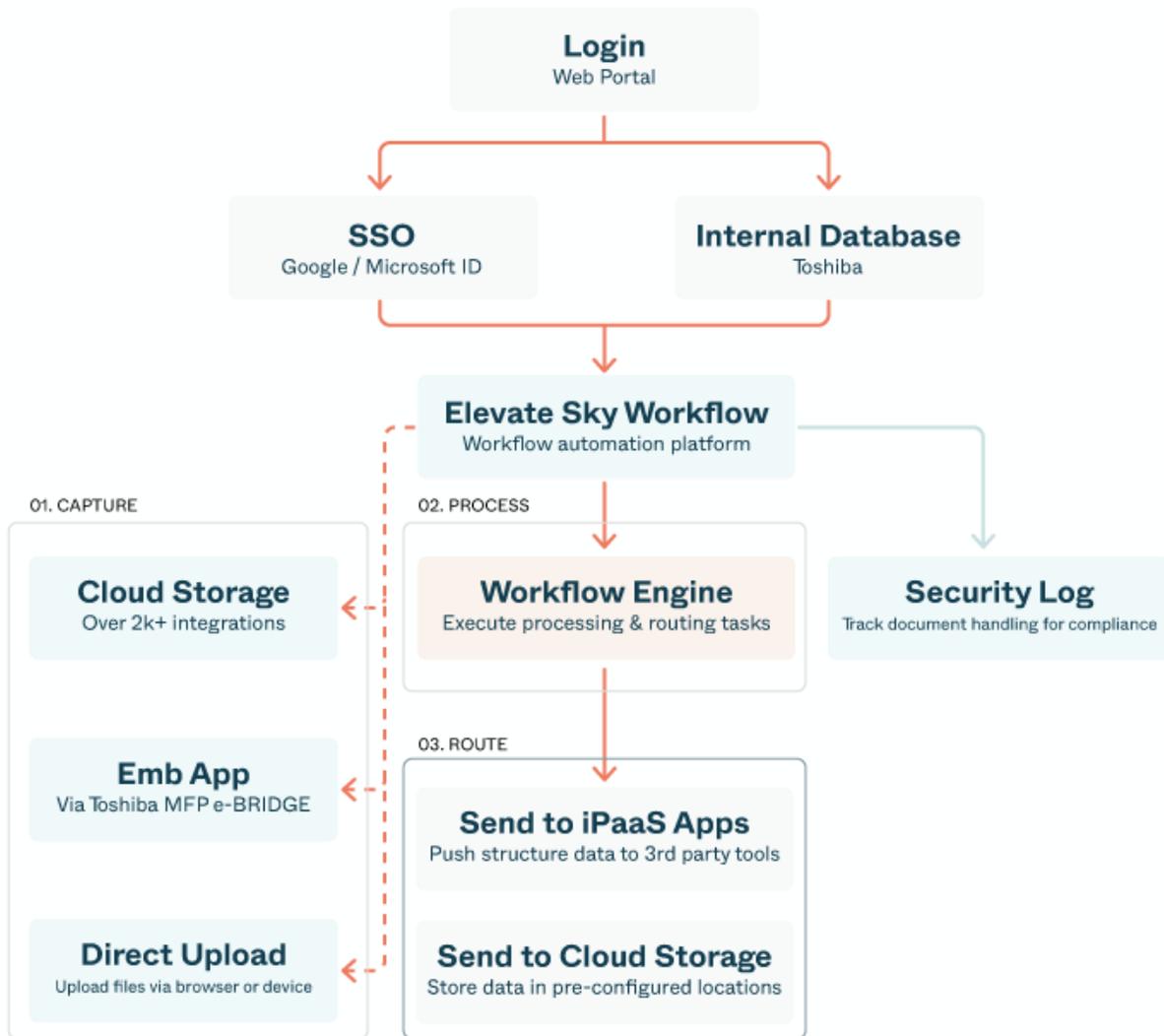
Web Portal

The Web Portal allows users to access and manage workflows from a PC or smartphone via a web browser. *(Chrome is recommended.)*

To access the Web Portal, navigate to: https://capture.esw.toshiba-solutions.com

From the Web Portal, users can:

- Run pre-configured workflows by uploading documents
- Monitor job status and history for completed and in-progress tasks
- Review and correct OCR results for suspended jobs
- Set up personal cloud storage connections for automatic document uploads
- Configure a secure PIN code for MFP login

Embedded Application

Users can securely log in to Elevate Sky® Workflow through the Embedded Application using a PIN code, accessing and running available workflows directly from the MFP.
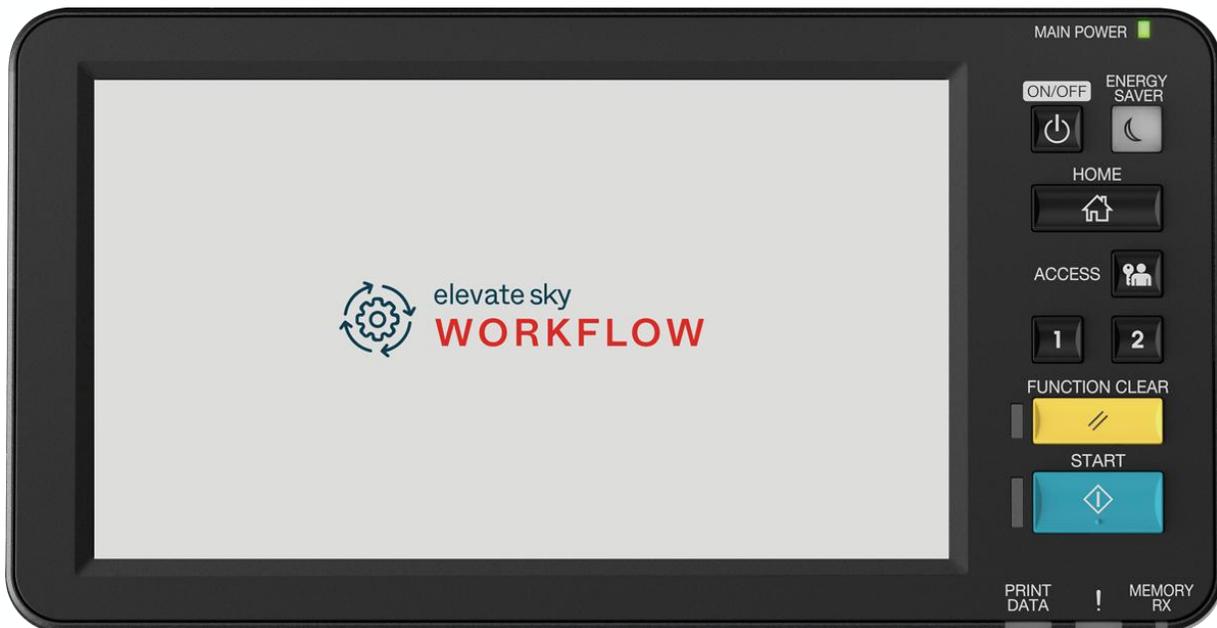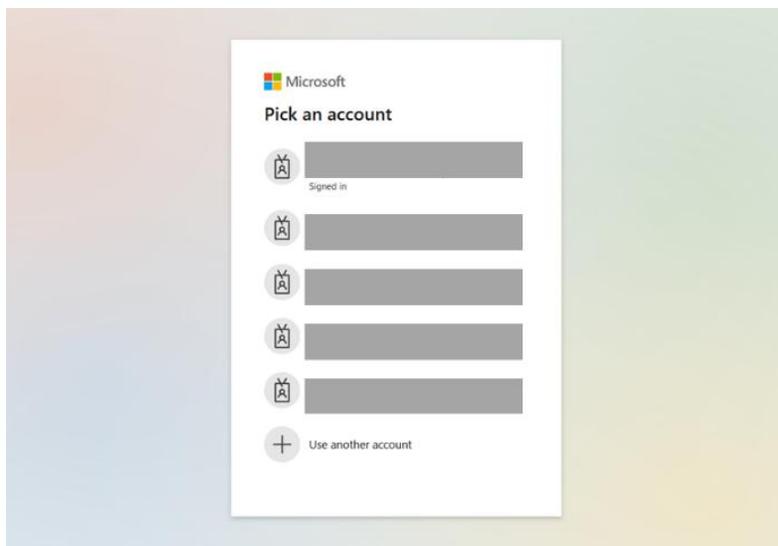
Getting Started with Elevate Sky® Workflow

1   Initial Login to the Web Portal

● Access the Web Portal from a web browser (Chrome recommended) using the following URL: https://capture.esw.toshiba-solutions.com

● Enter your email address, and you will be redirected to your company's login method:
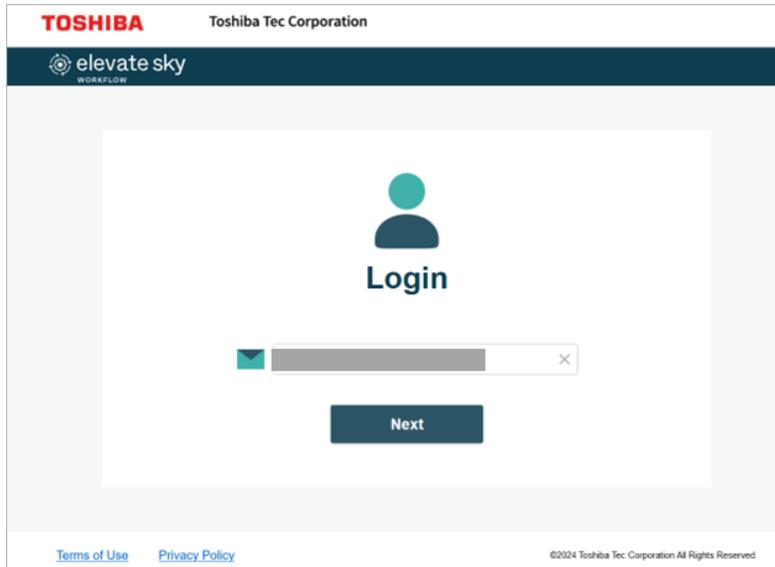
Google™ or Microsoft® users: The corresponding login screen will appear.


Local Login users: You will be prompted to enter your Elevate Sky® Workflow password. If logging in for the first time, refer to your invitation email for the temporary password.

Pre-configuration from the Web Portal – PIN Code

Generate a PIN Code for MFP Login

- Navigate to Account > General to generate a PIN code for logging into the MFP Embedded Application.
- **Important:** Generating a new PIN code will automatically invalidate any previously issued PIN.
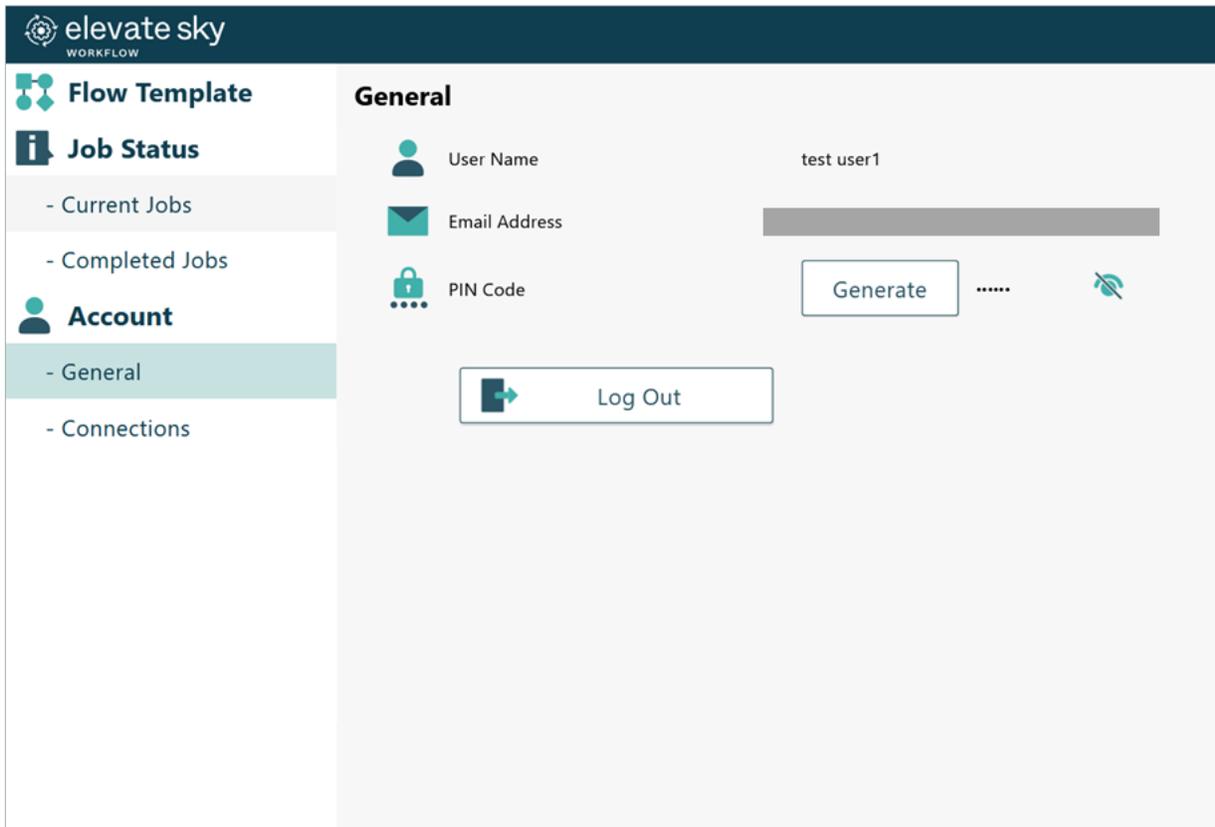
## Pre-configuration from the Web Portal – User Account Connections

Set Up User Account Connections

- Navigate to Account > Connections to configure your cloud storage service connections. These connections are used when utilizing the optional "Browse and Upload" feature to upload files to the registered cloud storage service.

- Click "Connect", and an authentication screen will appear. Once authentication is complete, your account will be available for selection in the "Browse and Upload" section

- For more details, see Section 3 – Browse and Upload to Cloud Storage from the Workflow Execution Screen.
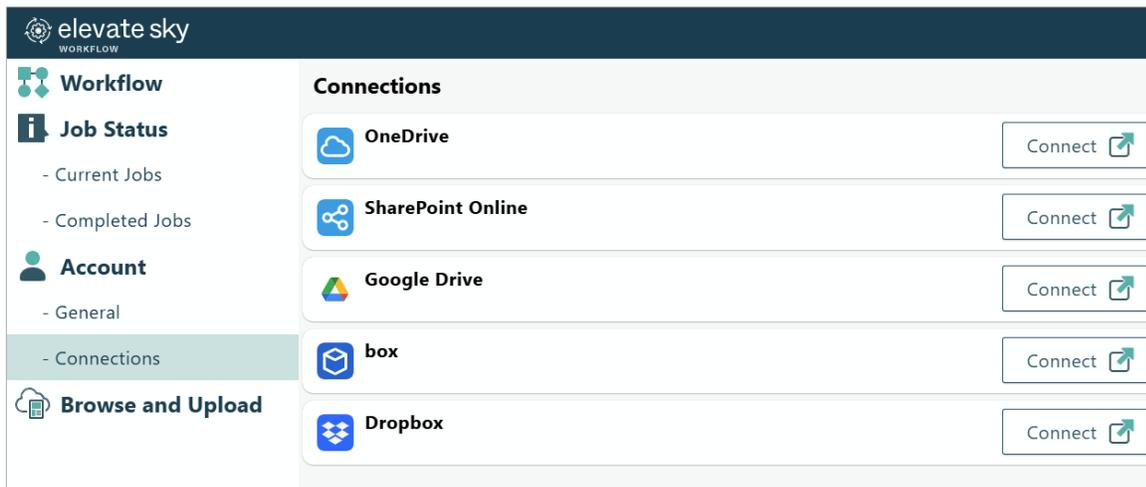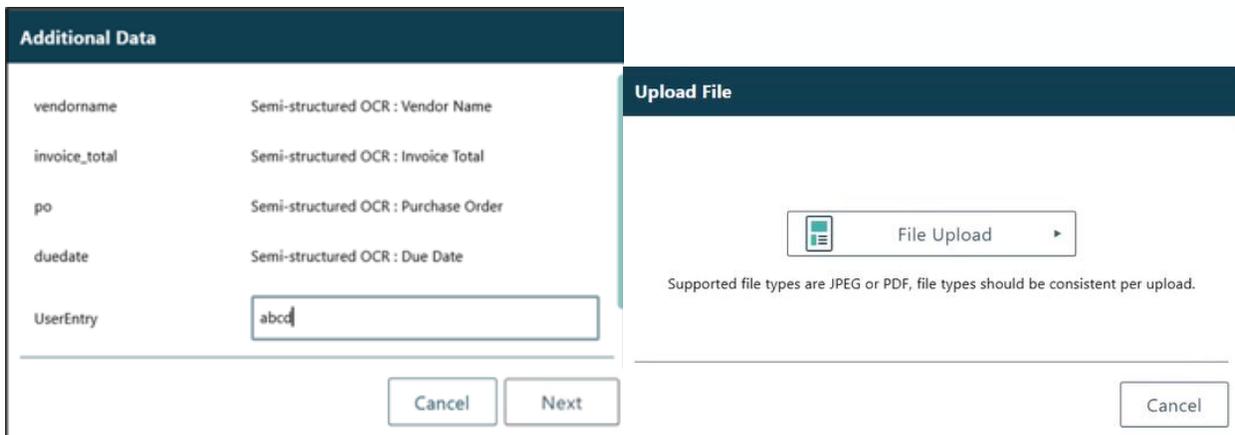
2   Running Workflow Templates from the Capture Screen

- Users can initiate workflows by selecting a Workflow Template from the "Workflow" section in the Web Portal.
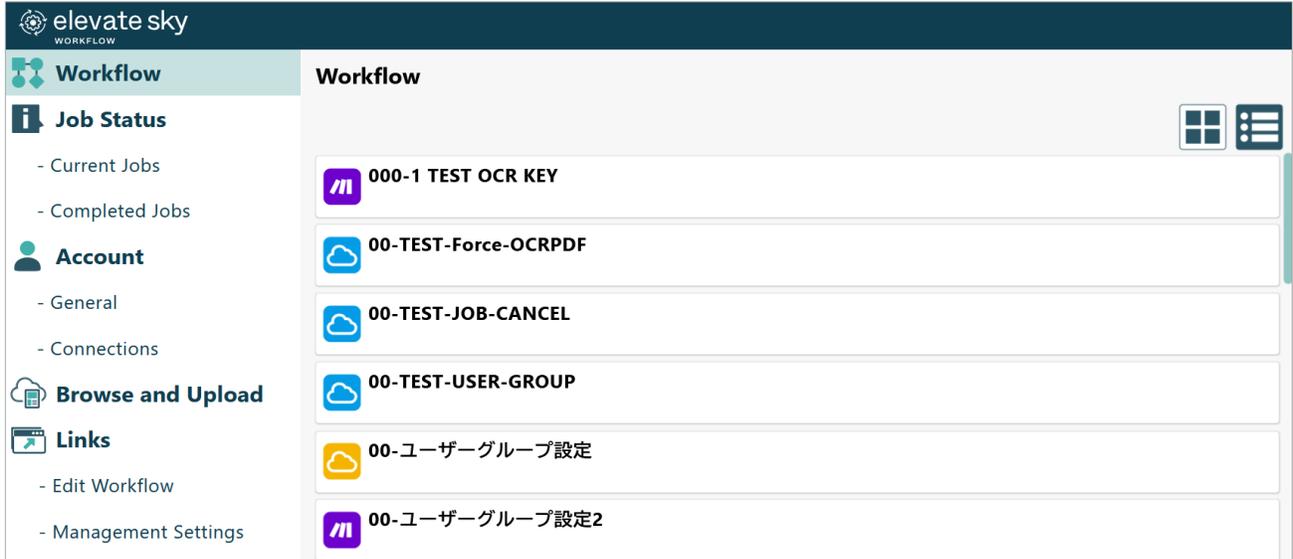

- After selecting the Workflow Template, the user will be asked to fill in the required fields if the selected template requires input.
- Upload the file(s) to start the workflow execution job.

File Upload Requirements

- Supported file types: JPEG, or non-encrypted PDF.
- File consistency: When uploading multiple files, all must be of the same format.
- File size limit: Maximum 100MB per upload.
- Page limit: Up to 300 pages per file.
- Pixel size limit: Maximum 90 megapixels per page.
- PDF area limit: Maximum 1000 square inches per file.

- Once the job is successfully initiated, track its progress in the "Job Status" section.
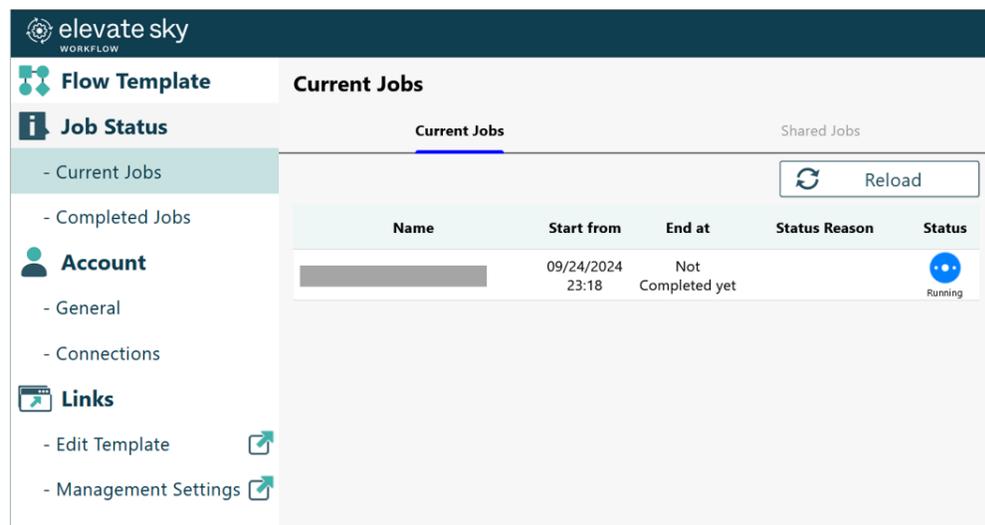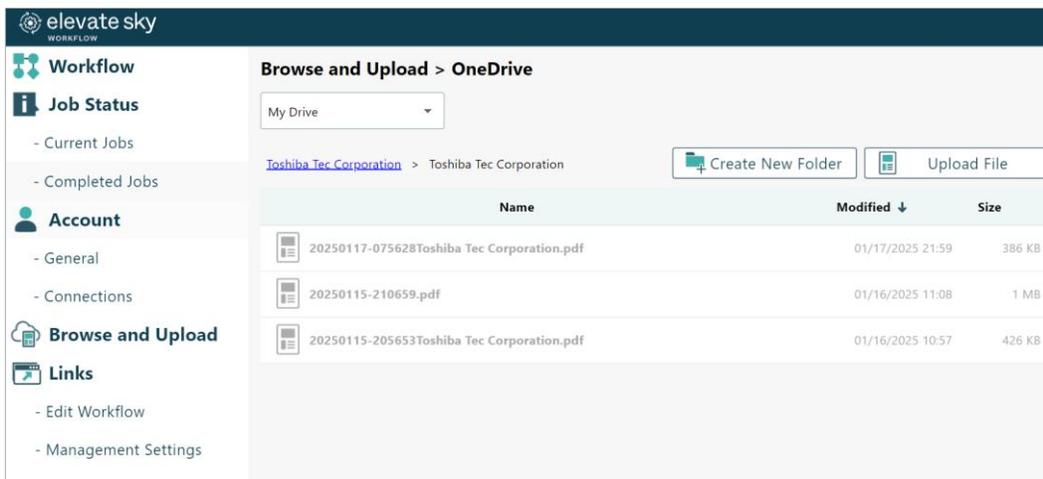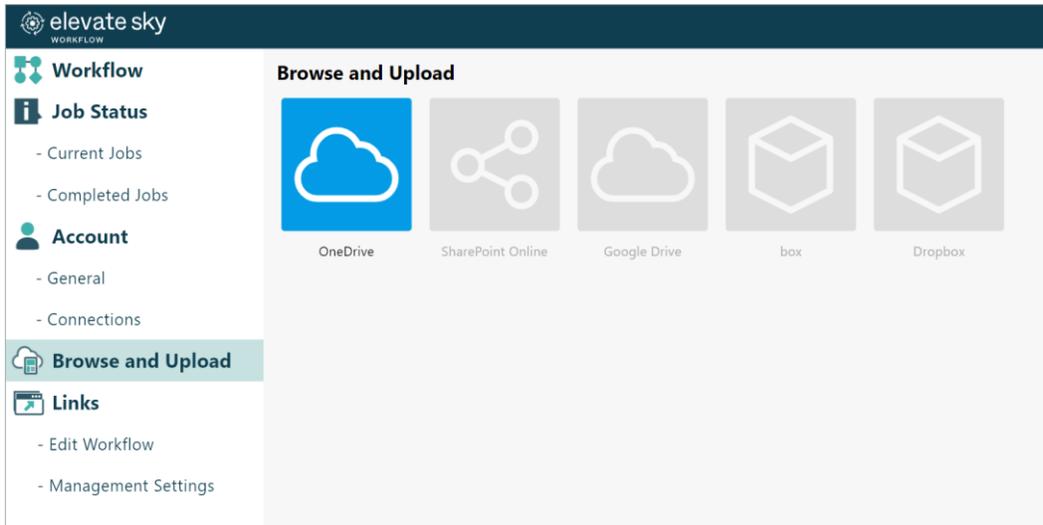
3 Browsing & Uploading Files to Cloud Storage from the Workflow Execution Screen

Users can browse and upload files directly to their registered cloud storage services. If this feature is disabled by the administrator, the "Browse and Upload" option will not be visible.

When selecting a connection, navigate to the correct location or create a new folder, and choose "Upload File" to proceed with file submission.
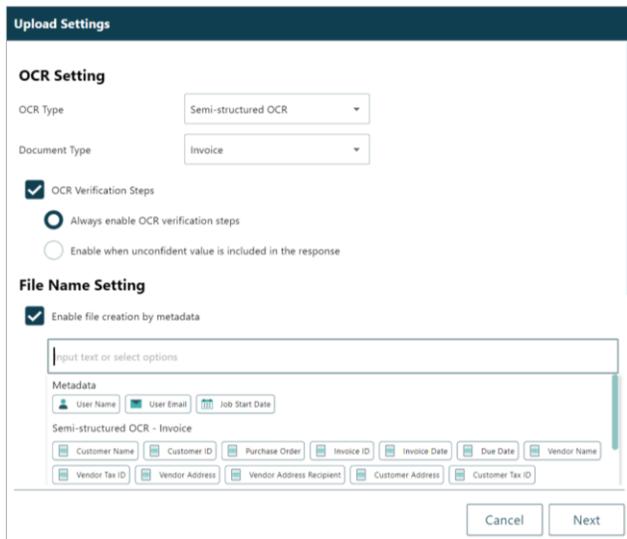
Upload File Settings

OCR Settings

- OCR Type
    - Enabled = Semi-Structured OCR
    - Disabled = None
- Document Type (Semi-Structured OCR) – Select the document type
- OCR Verification Steps – (Semi-Structured OCR)

File Name Settings

- Enable file creation by metadata
- If OCR Type = Semi-Structured
    - Enter a name manually or select Metadata Naming or Semi-Structured OCR Naming based on document type
- If OCR Type = None
    - Enter a file name manually or select Metadata Naming

### Output File Format Settings

- Convert scanned documents to searchable PDFs with OCR
- Select First / Second Language for OCR processing

PII Redaction

- Personal Identifiable Information (PII) redaction verification is available to ensure compliance before file upload.

4   Running Workflow Templates from the MFP

Users can log into the MFP Embedded Application using their PIN code, which is generated in the Web Portal.
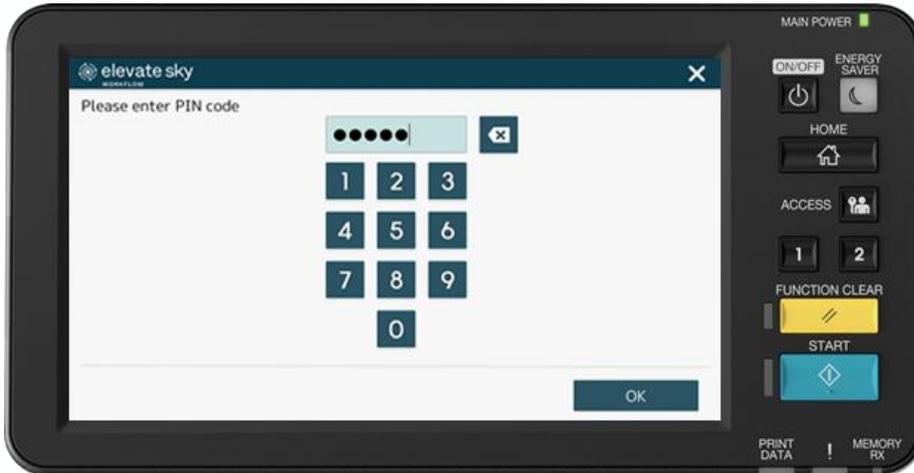

If the "Skip Login at Device" setting is enabled by the ESW administrator and MFP User Authentication is turned on, the authenticated user will be automatically navigated to the Workflow List screen.

- After login, view the list of available Workflow Templates. Once a Workflow Template is selected, the Metadata (optional) / Scanning Settings / Advanced Settings screen will appear. Press "Scan" to begin document processing, and view job progress in the Web Portal's Job Status UI.

Configuring Scan Parameters on the MFP

If the "Allow changing scan setting on MFP" option is enabled in the Workflow Template, users can modify scan settings directly from the MFP panel before starting the scan.
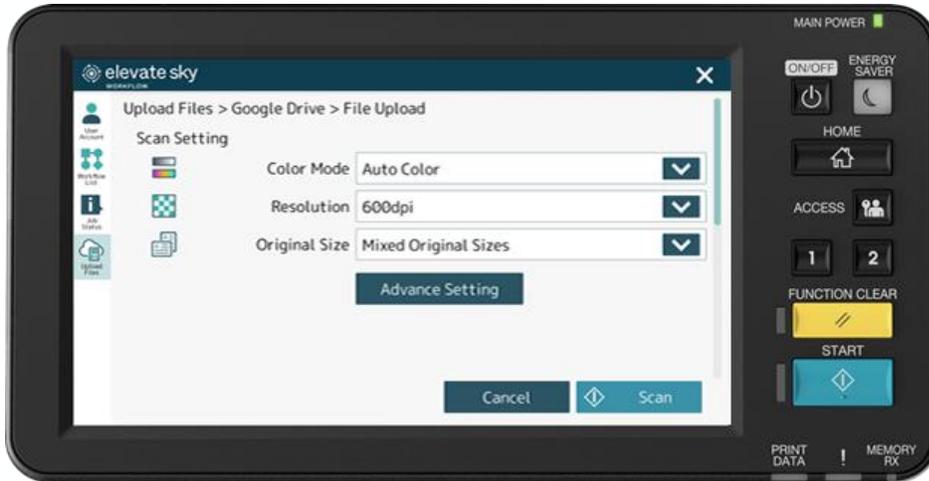

Page Split Function

Users can split scanned documents into multiple files using the Page Split Setting in the MFP Embedded Application. If enabled, the scanned document is automatically divided based on the defined split rule.

Example: If a 10-page document is scanned with a "Split per Page" setting of 3, the system will generate 4 separate jobs as follows:

- Job 1: Pages 1, 2, 3
- Job 2: Pages 4, 5, 6
- Job 3: Pages 7, 8, 9
- Job 4: Page 10
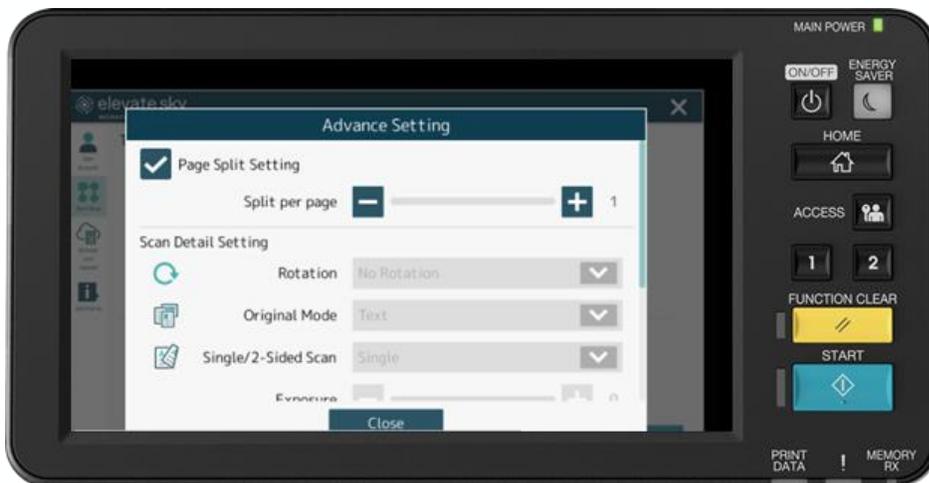
5   Browsing and Uploading to Cloud Storage from the MFP

If the "Browse and Upload" setting is enabled by the ESW administrator, users can browse and upload files directly to cloud storage services from the MFP Embedded Application.

From the MFP panel, select "Browse and Upload", or navigate to Scan Settings > Advanced Settings to configure file preferences before uploading.

Available Advanced Settings

OCR Settings

- OCR Type
    - Enabled = Semi-Structured OCR
    - Disabled = None
- Document Type (Semi-Structured OCR) – Select the document type
- OCR Verification Steps – (Semi-Structured OCR)

File Name Settings

- Enable file creation by metadata
- If OCR Type = Semi-Structured
    - Enter a name manually or select Metadata Naming or Semi-Structured OCR Naming based on document type
- If OCR Type = None
    - Enter a file name manually or select Metadata Naming

Output File Format Settings

- Convert scanned documents to searchable PDFs with OCR
- Select First / Second Language for OCR processing

Page Split Settings

- If Page Split is enabled, scanned documents will be automatically divided into separate files based on pre-defined split rules.
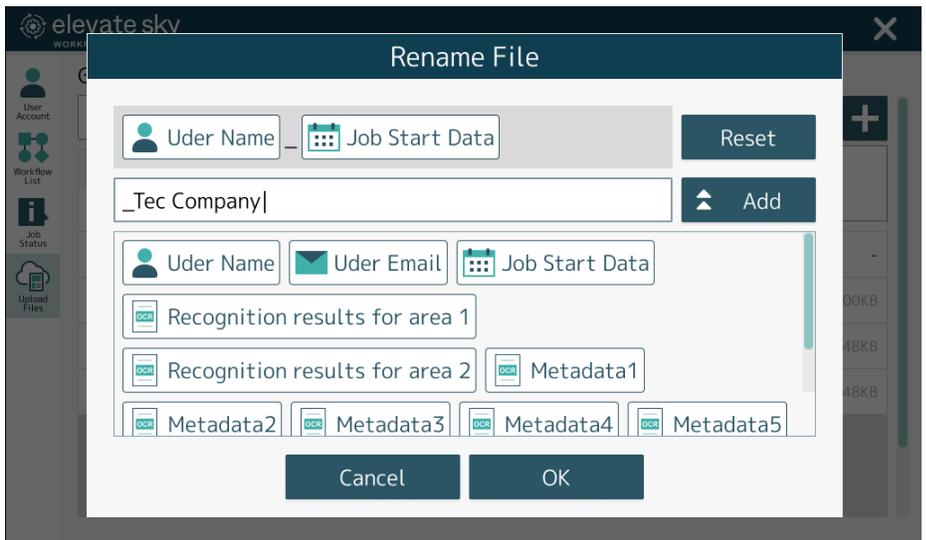
PII Redaction

- Personal Identifiable Information (PII) redaction verification is available to ensure compliance before file upload.

Scan Detail Settings

- If the Workflow Template allows modifications, users can adjust Scan Settings directly on the MFP panel before scanning.
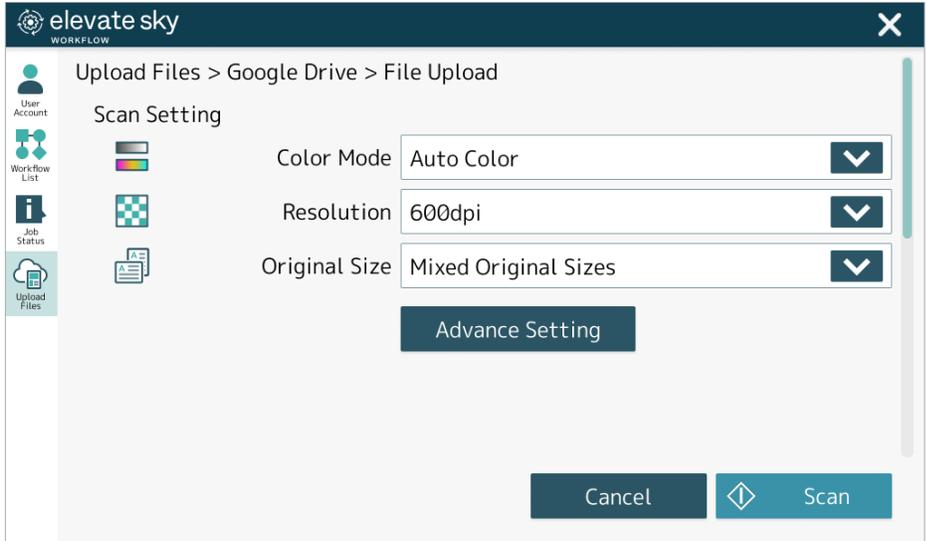
File Upload Dialog Box

6 Confirming and Validating OCR Result from the Capture Screen

When a Workflow Template is configured with an OCR Profile and "OCR Verification Steps" is enabled, jobs may be suspended if the Template OCR Profile condition is met.

● Always enable OCR verification steps

● Enable when confidence is low – Set confidence threshold to trigger verification

Suspended jobs appear in the ESW Job Status - Current Jobs list. Selecting the job name opens the OCR Verification screen.

If a job remains suspended for more than 30 minutes, a reminder email is sent to the user.
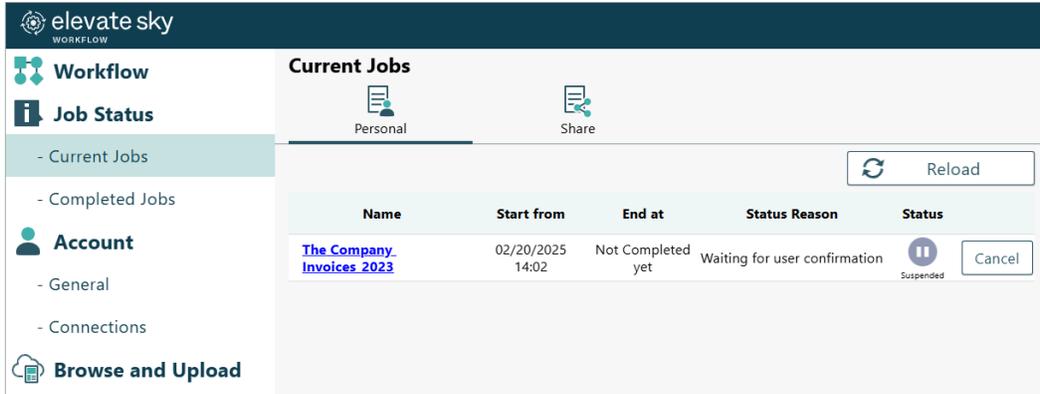
- To update the recognized values, simply edit the text in the OCR Verification screen.
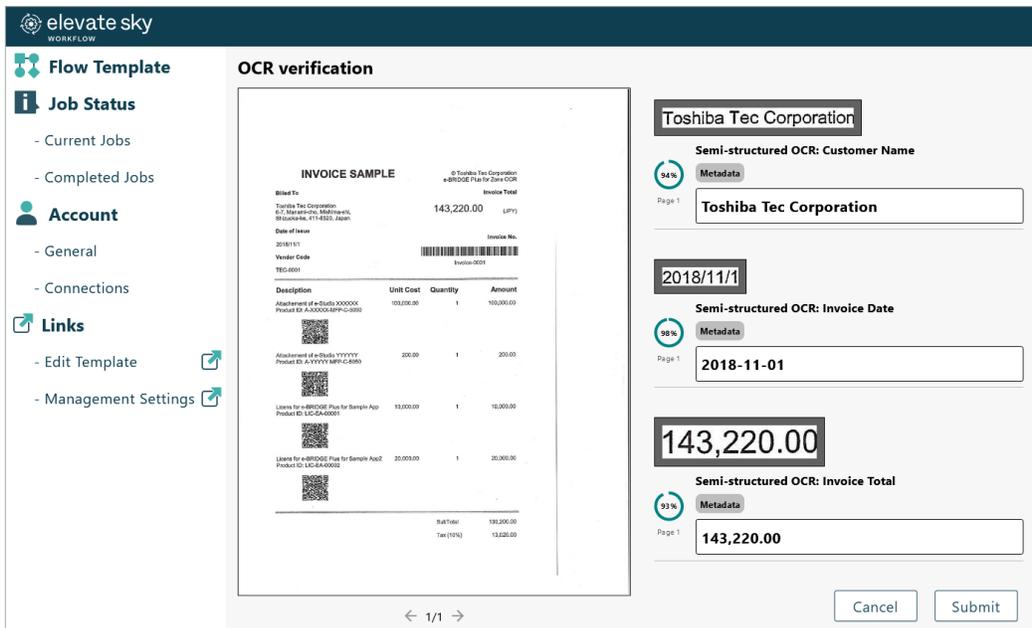
7 Confirming and Validating PII Redaction Result from the Workflow Execution Screen

When executing a workflow with PII Redaction enabled, Elevate Sky® Workflow automatically detects and redacts Personally Identifiable Information (PII) in scanned or uploaded documents.

Suspended jobs appear in the ESW Job Status - Current Jobs list. Selecting the job name opens the "OCR Verification / PII Redaction" screen. Click "Next" to review redaction results. If enabled, users can add, remove, or modify redacted words or areas. Redacted text is replaced with "****" in the final searchable PDF. If configured, users cannot unmask system-detected redactions but can add additional masks.
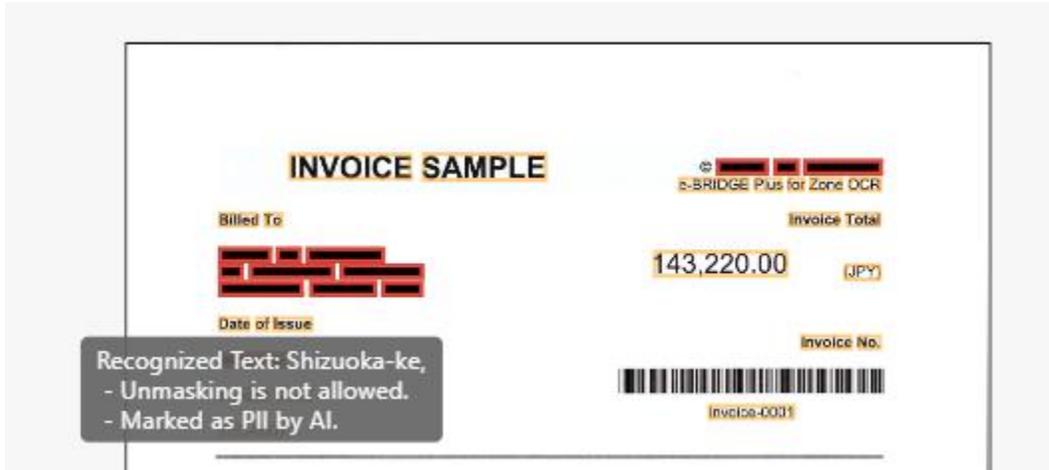
PII Redaction
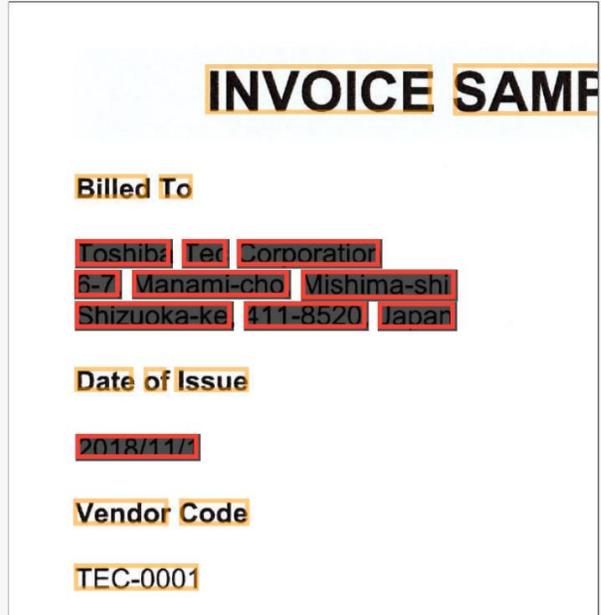
Redaction Verification Screen
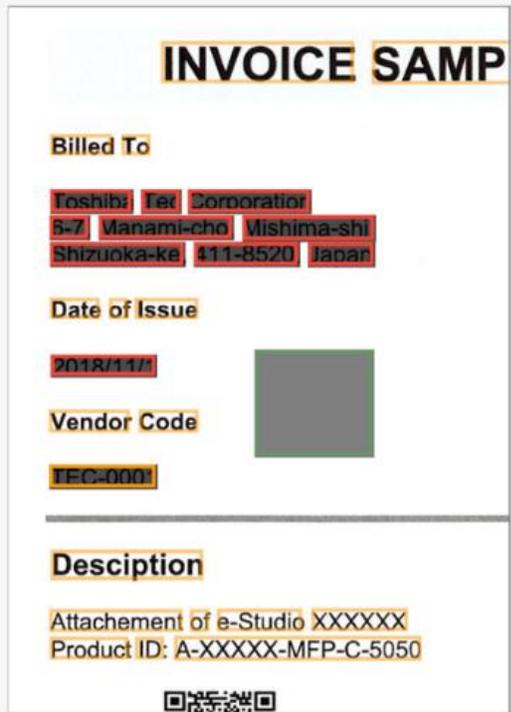
- Modify redaction by adding masked words and areas.

- System-detected words cannot be unmasked.

8   (Optional) Job Execution from Cloud Storage Watch Trigger

If your company has enabled the "Cloud Service Trigger" feature, workflows can be automatically triggered by uploading documents to a designated watch folder. *For details on the watch folder path, please contact your company administrator.*

If you belong to a cloud storage user group, jobs executed via the cloud storage trigger will appear in Job Status > Current Jobs / Completed Jobs > "Share" tab. If OCR or PII redaction is enabled, users can verify the shared jobs as needed.
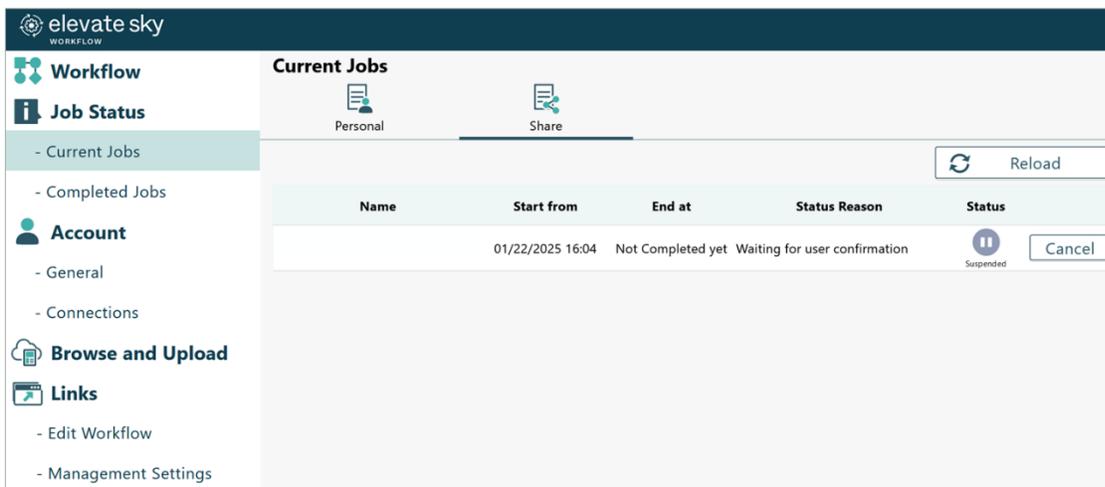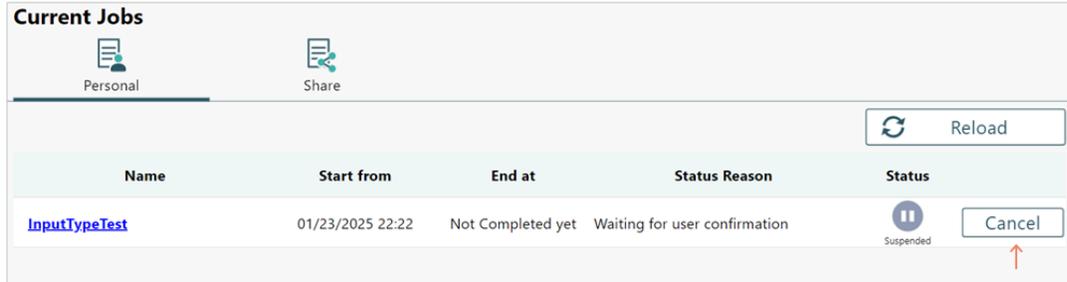

Shared Current Jobs

9 Job Cancellation from the Workflow Execution Screen

Jobs can be cancelled from the Job Status screen.

*Note: If a job is cancelled after reaching the image processing or extraction stage, it will still count toward the company's usage allocation.*

**Job Cancel Button in Job Status**

Appendix

Password Reset

If a user forgets their password after the initial login, they can reset it by selecting "Forgot your password" on the login page. A reset request will be sent to their registered email address.

- The reset code is valid for 1 hour.
- Users must enter the reset code and create a new password to regain access.
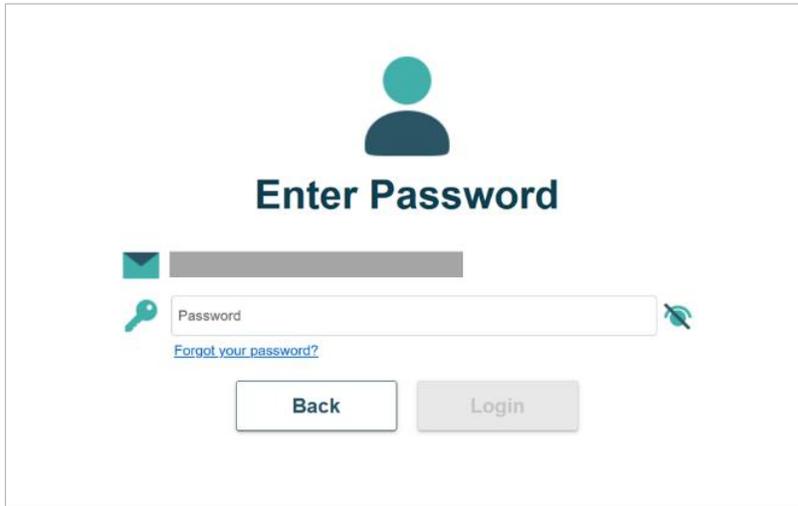
Forgotten Password Links
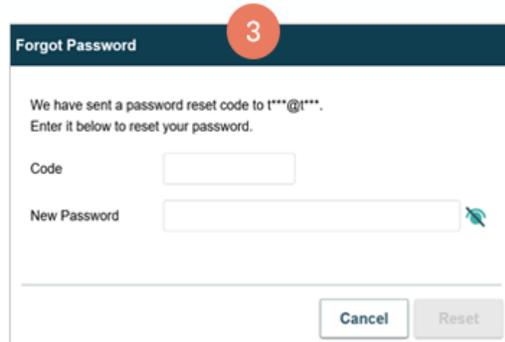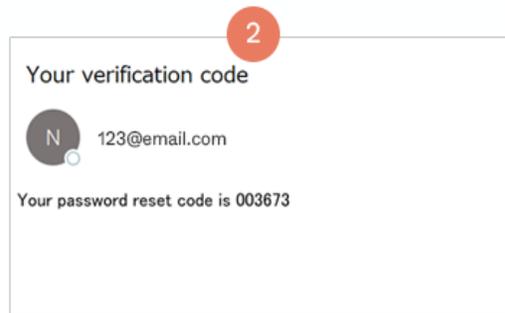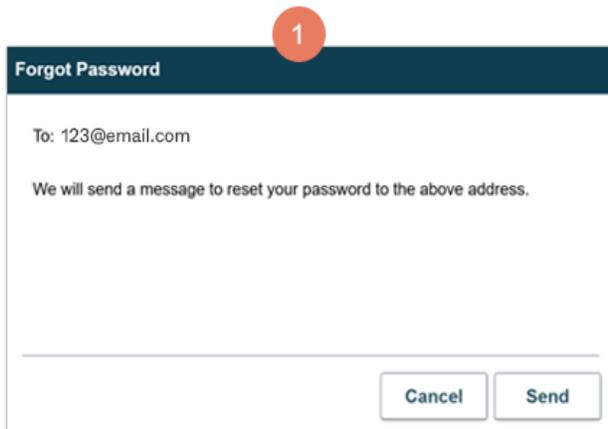
Password Reset Flow

Still have questions?

We're here to help. For personalized assistance or help with configuring your workflow, contact your Toshiba representative—we'll make sure you're set up for success.