



# Clave

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Enterprise-Grade Document Processing · Classification · Extraction · Review

Docker

On-Premise

Free Commercial Licenses

Zero Cloud Dependency

Fully Containerised · End-to-End Encrypted · All ML Licenses: Free for Commercial Use

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# Application Layout & Role-Based Navigation

Single codebase, single deployment. Sidebar items not available to a role are never rendered in the DOM.

**Clave** 🔔 3 PK Prashant K. ▾

PRIMARY NAVIGATION

- 🏠 Home All roles
- ▶ Process Docs P, A
- 🔍 Review Queue All roles
- 📦 Results P, A
- 📁 Data Explorer P, A
- 📅 Activity Log P, A

ADMIN ONLY

- 👤 User Mgmt A
- 🔧 Projects A
- 📐 Schema Mgr A
- 📦 Model Mgr A
- ⚙️ System Config A
- 📊 Analytics A

## Content Area


This area changes based on the selected sidebar item.

**Topbar:** App logo (left) · Current Submission ID (center, contextual) · Notification bell with unread count (right) · User avatar + name with dropdown (right)

**Sidebar:** Persistent on all pages · Collapsible to icon-only mode · Two groups separated by divider · P = Processing Specialist, A = Platform Admin

## Dashboard — Processing Specialist View

Clave

  Maria R. Home Process Docs Review Queue Results Data Explorer Activity Log

## Dashboard

6

My Submissions Today

2

Pending Review

87%

My Success Rate


52s

Avg. Processing Time

## My Recent Submissions

ID	PROJECT	FLOW	FILES	STATUS	DATE
#0091		Credit Card	3	Complete	Today 11:02
#0090		Loan App	5	In Review	Today 10:44
#0088		Election	2	Complete	Today 10:20
#0086		Mortgage	8	Complete	Today 9:55
#0084		Credit Card	3	Failed	Today 9:30
#0082		Loan App	4	Complete	Yesterday

## Status Breakdown (30d)

 Complete 60% Partial 20% Failed 20%

# Dashboard — Review Specialist View

Clave



Review Spec. K.



Home



Review Queue

## Dashboard

12

My Pending Reviews

7

Completed Today

4.2m

My Avg. Review Time

### Recent Reviews

SUBMISSION	PROJECT	FLOW	DOC TYPE	COMPLETED	FIELDS FIXED
#0089	[REDACTED]	Credit Card	National ID	10:42 AM	3
#0087	[REDACTED]	Loan App	Income Statement	10:15 AM	1
#0085	[REDACTED]	Credit Card	Application Form	9:51 AM	0
#0083	[REDACTED]	Election	National ID	9:30 AM	2
#0080	[REDACTED]	Loan App	Tax Return	9:12 AM	5
#0078	[REDACTED]	Mortgage	Property Deed	8:44 AM	2
#0076	[REDACTED]	Credit Card	Application Form	Yesterday	0

No system-wide stats, no charts — Review Specialists only see their own review work.

# Dashboard — Admin View

Clave

Admin

- Home
- Process
- Review
- Results
- Data
- Log
- ADMIN
- Users
- Projects
- Schema
- Assign Rules
- Models
- Config
- Analytics

## Admin Dashboard

**42**

Processed Today

**9**

Pending Reviews

**91%** ▲3%

Success Rate (7d)

**48s**

Avg Time

**127**

Training Queue



### System Health

- Doc Processing Engine
- OCR Engine
- AI Reasoning Engine
- Database
- Storage (NAS)

### Recent Submissions (All Users)

ID	USER	PROJECT	STATUS
#0091	Maria R.	<div style="width: 100px; height: 15px; background-color: #ccc;"></div>	<span style="background-color: #28a745; color: white; padding: 2px 5px;">Done</span>
#0090	Maria R.	<div style="width: 100px; height: 15px; background-color: #ccc;"></div>	<span style="background-color: #ffc107; color: white; padding: 2px 5px;">Review</span>
#0089	Carlos L.	<div style="width: 100px; height: 15px; background-color: #ccc;"></div>	<span style="background-color: #28a745; color: white; padding: 2px 5px;">Done</span>

### User Activity Today

Maria R. — 6 submissions, 5 complete, 1 in review

Carlos L. — 4 submissions, 4 complete

Ana S. — 3 submissions, 2 complete, 1 failed

Review Spec. K. — 7 reviews completed

# Process Documents — Step 1: Project Selection

Clave 🔔 PK Admin

- Home
- Process**
- Review
- Results
- Data
- Log

ADMIN

- Users
- Projects
- Schema
- Assign Rules
- Models
- Config
- Analytics

### Select a Project

🔍 Search projects...

Group by: All ▾ ≡ Grid

**BB** **BBVA Spain** Active

Banking

Credit Card App · Loan App · Mortgage

👤 3 users assigned

**SN** **Santander** Active

Banking

Credit Card App · Personal Loan

👤 2 users assigned

**CB** **CaixaBank** Maintenance

Banking

Credit Card App

👤 1 user assigned

**IB** **ING Bank** Active

Banking

Savings Account · Credit Card

👤 2 users assigned

Processing Specialists see only their assigned projects. Admins see all. Click a card to proceed.

# Process Documents — Step 2: Flow Selection & Thresholds

Clave BBVA Spain



- Home
- Process
- Review
- Results
- Data
- Log

This pipeline is trained to process the following document flows for BBVA Spain. Submitting document types outside these flows will be routed for manual review.

### Select a Flow

**Credit Card Application**  
 3 Application Forms + min 2 IDs  
 ~45 sec/file  
 ▼ What does this flow include?

**Loan Application**  
 2 App Forms + 1 Income + min 2 IDs  
 ~55 sec/file

**Mortgage**  
 4 App Forms + 2 Income + Property Deed + min 2 IDs  
 ~90 sec/file

**Advanced Settings**

Document Classifier

85%

How confident when identifying page types

⚠ Default values are calibrated for optimal accuracy. Saved with every submission for traceability.

Object Detection

75%

How confident when locating sections

OCR Confidence

80%

How confident when reading text

Continue →

# Process Documents — Step 3: Field Selection

Home

Process

Review

Results

### Choose Fields to Extract

**Extract All Fields**  
Every available field from all document types

**Select Specific Fields**  
Choose exactly which fields per document type

**▼ Application Form** Select All

Full Name Text
 Date of Birth Date
 Address Text
 Phone Number
 Email Text
 Signature Sig
 Employment Enum
 Nationality Text

**▼ National ID** Select All

ID Number Text
 Full Name Text
 Expiry Date Date
 Photo Photo

**▶ Income Statement** 0 selected

**Selection Summary**

Application Form: 6/8  
National ID: 4/4  
Income Statement: 0/5

---

**Total: 10 fields**

[Continue to Upload →](#)

# Process Documents — Step 4: Upload

Clave




Home

Process

Review

Results

BBVA → Credit Card Application → All Fields → Upload

  
 Drag your PDF files here, or click to browse  
PDF only · Max 50 MB per file

#	FILENAME	SIZE	PAGES	QUALITY	
1	BBVA_CC_001.pdf	4.2 MB	12	Good	✗
2	BBVA_CC_002.pdf	3.8 MB	9	Low	✗
3	BBVA_CC_003.pdf	5.1 MB	14	Good	✗

Page Thumbnails Preview

p1

p2

p3

p4

p5

p6

p7

p8

...

🔔 Notify Team (optional) · Best results at 150+ DPI

[Start Processing \(3 files\) →](#)

# Process Documents — Step 5: Processing Status

Clave



MR



Home



Process



Review



Results

~38 seconds remaining

## Pipeline Progress

- ✓ 1. Preparing Your Documents 4.2s
- ✓ 2. Identifying Document Types 8.1s
- ✓ 3. Verifying Document Completeness 1.3s
- ✓ 4. Locating Key Sections 6.7s
- 5. Reading Document Content in progress...
- 6. Organising Extracted Information
- 7. Saving Your Results

## Files in Batch

FILE	PAGES	STATUS
BBVA_CC_001.pdf	12	Complete
BBVA_CC_002.pdf	9	1 section needs attention
BBVA_CC_003.pdf	14	Processing...

User-facing labels only. No model names or technical internals are shown.

## Process Documents — Step 6: Results

Clave MR

- Home
- Process**
- Review
- Results

**Partial Success**  
2 files processed successfully. 1 file requires attention. Assign Reviews →

**BBVA\_CC\_001.pdf** Complete  
12 pages · Application Form + National ID  
Full Name: Carlos Lopez Martinez · DOB: 15/03/1985 · Address: Calle Mayor 12, Madrid · ID: 12345678Z · Employment: Employed  
Expiry: 22/11/2028

**BBVA\_CC\_003.pdf** Complete  
14 pages · Application Form + National ID  
Full Name: Ana Garcia Ruiz · DOB: 08/07/1992 · Address: Av. Diagonal 22, Barcelona · ID: 87654321X · Employment: Self-Employed  
Expiry: 14/06/2029

**BBVA\_CC\_002.pdf** Needs Review  
9 pages · 2 fields need attention  
**Missing: 1 required document type (Income Statement)**  
This file will be assigned to a Review Specialist for manual verification.

Additional files from this submission appear here

Results auto-saved to database · 3 files in batch

Export Assign Reviews → New Submission

# Review Specialist Assignment Interface

Clave Assign Reviews MR

Home Process Review Results

### Documents Needing Review 3 items

DOCUMENT	DOC TYPE	REASON	EST. TIME
BBVA_CC_002.pdf	Income Stmt	Missing doc	~8 min
BBVA_CC_002.pdf	App Form	3 failed OCR	~12 min
BBVA_CC_005.pdf	National ID	Low confidence	~5 min

### Available Review Specialists

**RK Rev. Specialist K.**  
Queue: 2 items · Avg: 6.3 min/review · Online Assign Selected →

**RB Rev. Specialist B.**  
Queue: 5 items · Avg: 8.1 min/review · Online Assign →

**RC Rev. Specialist C.**  
Queue: 0 items · Avg: 7.0 min/review · Offline Assign →

**Assignment Method**

Manual Individual Manual Bulk Equal Distribution Smart Assign Round-Robin Apply Project Rules

Selected specialists will be notified via in-app notification Confirm Assignment

## Review Queue

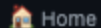
Clave



5

AK

Review Spec. K.



Home



Review Queue

Review Queue 9 pending

Project: All ▾

Flow: All ▾

Status: Pending ▾

Date Range ▾

SUBMISSION	PROJECT	FLOW	REASON FLAGGED	ASSIGNED TO	ASSIGNED BY	DATE	STATUS	
#0042	BBVA	CC App	Missing required doc	—	Maria R.	Today 10:44	Pending	<a href="#">Review →</a>
#0039	BBVA	Loan	Low OCR confidence	Rev. Spec. K.	Carlos L.	Today 10:20	In Progress	Assigned
#0037	Santander	CC App	3 fields failed OCR	Rev. Spec. B.	Ana S.	Today 9:55	In Progress	Assigned
#0035	BBVA	Mortgage	Unknown doc class	—	Maria R.	Today 9:30	Pending	<a href="#">Review →</a>
#0033	BBVA	CC App	Image quality low	Rev. Spec. K.	Carlos L.	Yesterday	Completed	Done

Review Specialists: full review access. Processing Specialists: view status of own submissions only (read-only). Admins: full access.

# Manual Review — Split-Screen Interface

Clave Review Mode
🔔 AK

🏠 Home

🔍 Review

BBVA APPLICATION FORM

Full Name: Carlos Lopez

DOB: 15/03/1985

Address: Calle M4yor 12... (low conf)

Phone: [FAILED]

Employment: Employed

Nationality: (not selected)

Signature Detected

OCR Threshold: 80%

**Application Form Fields**

97% Full Name: Carlos Lopez Martinez

94% Date of Birth (Date Picker): 15/03/1985

62% Address: Calle M4yor 12, Madrid  
Suggested: Calle Mayor 12, Madrid

-- Phone (Number)

91% Employment Status (Dropdown): Employed +

✓ Signature (Read-only preview): Signature detected

■ High ■ Low ■ Failed ■ Not selected

5/6 fields complete

Tab: next · Ctrl+S: submit

Submit & Complete

## Results &amp; Exports

Clave



 Maria R.

Home

Process

Review

Results

Data

Log

## My Submissions

Project: BBVA ▾

Status: All ▾

ID	PROJECT	FLOW	FILES	STATUS	DATE	ACTIONS
#0091	BBVA	CC App	3	Complete	Today	<a href="#">View</a> <a href="#">Export</a>
#0090	BBVA	Loan	5	Review	Today	<a href="#">View</a>
#0088	Santander	CC App	2	Complete	Today	<a href="#">View</a> <a href="#">Export</a>
#0084	BBVA	CC App	3	Failed	Today	<a href="#">View</a> <a href="#">Reprocess</a>

## Export — #0091

Field Mapping

Format

Save Template

Load template: BBVA CC Export v1 ▾

INTERNAL FIELD	EXPORT NAME	
full_name	Applicant Name	✓
date_of_birth	DOB	✓
address	Address	✓
phone	Phone Number	✓
id_number	National ID	□

Reset Defaults

Download JSON

## Data Explorer

Clave


 Admin

Home

Process

Review

Results

Data

Log

ADMIN

Users

Projects

## Collections

submissions 142

documents 891

extracted\_fields 4,230

pipeline\_logs 12,401

manual\_reviews 87

training\_queue 127

users 8




export\_templates 5

submissions

+ Add Filter

status = complete X

Bulk Export


_ID	USER_ID	PROJECT	FLOW	STATUS	FILES	CREATED_AT	ACTIONS
65a3f...	Maria R.	BBVA	CC App	complete	3	2026-02-24	  
65a3e...	Carlos L.	Santander	CC App	complete	2	2026-02-24	  
<pre>{ "id": "65a3f...", "user_id": "ref:maria", "project_id": "ref:bbva", "flow_id": "ref:cc_app", "status": "complete", "file_count": 3, "thresholds": { "classify": 0.85, "od": 0.75, "ocr": 0.80 }, "created_at": "2026-02-24T10:02:00Z" }</pre>							

Showing 1-25 of 142

← Prev | 1 2 3 4 5 6 | Next →

## Activity Log — Immutable Audit Trail

Clave

  Admin Home Process Review Results Data Log

ADMIN

 Users

## Activity Log

Immutable — No edit/delete

User: All ·

Type: All ·

Date: Today ·

11:02 AM	<span>submission</span>	Maria R.	created submission #0091 (BBVA - CC App - 3 files)	<a href="#">View Details</a>
10:58 AM	<span>pipeline</span>	System	#0090 Stage 4 (OCR) completed in 12.3s	<a href="#">View Details</a>
10:44 AM	<span>review</span>	Review Spec. K.	completed review for #0089 (3 fields corrected, 4.2 min)	<a href="#">View Details</a>
10:20 AM	<span>threshold</span>	Carlos L.	<span>⚠ Custom threshold used: OCR set to 70% (default: 80%)</span>	<a href="#">View Details</a>
10:15 AM	<span>export</span>	Maria R.	exported #0088 as JSON (template: BBVA CC Export v1, 12 fields)	<a href="#">View Details</a>
9:30 AM	<span>session</span>	Admin	logged in from 192.168.1.100	<a href="#">View Details</a>

# Notification & Collaboration System

Clave



Maria R.

Home

Process

Review

Results

Dashboard content (dimmed when panel open)

### Notifications

Mark all as read

✓ **Processing Complete** 2 min ago

#0091 (BBVA - Credit Card) — 3 files processed successfully.

[View →](#) [Share](#)

⚠ **Review Needed** 15 min ago

#0090 has 2 items requiring manual review.

[View →](#)

💬 **Carlos L. shared with you** 1 hr ago

"Check the results for Santander batch - looks good!"

[View →](#)

### Share Notification

Search users: Carlos L., Ana S....

Optional message...

[Send](#)

## Admin: User Management

Clave


PK Admin

Home

Process

Review

Results

Data

Log

ADMIN

Users

Projects

Schema

Assign Rules

Models

Config

Analytics

All Users 8

+ Create User

NAME	EMAIL	ROLE	STATUS	LAST LOGIN	ACTIONS
Prashant K.	admin@co.com	Platform Admin	Active	Today 9:30	Edit
Maria R.	maria@co.com	Processing Specialist	Active	Today 8:45	Edit Deactivate Force Logout
Carlos L.	carlos@co.com	Processing Specialist	Active	Today 10:00	Edit Deactivate
Ana S.	ana@co.com	Processing Specialist	Active	Yesterday	Edit
Review Spec. K.	annot@co.com	Review Specialist	Active	Today 9:00	Edit
Old User	old@co.com	Processing Specialist	Inactive	30 days ago	Reactivate
New Hire	new@co.com	Processing Specialist	New	—	Reset Pwd

## Create New User

Full Name

Email

Role




Assign Projects (Processing Specialist)

 BBVA Spain
  Santander
  CaixaBank

## Admin: Projects, Flows &amp; Schema Manager

Clave
🔔
PK

Home

---

ADMIN

- 👤 Users
- 📁 Projects
- 📄 Schema
- 📋 Assign Rules
- 📊 Models
- ⚙️ Config
- 📈 Analytics

### Projects

BB
BBVA Spain
Active

3 flows · 3 processors assigned

### Flows (BBVA)

#### Credit Card Application

Expected docs:

- Application Form: 3 (required)
- National ID: min 2 (required)
- Income Statement: 1 (optional)

allow\_extra\_ids: true · page\_tolerance: 2

#### Loan Application

2 doc types configured

+ Add Flow

### Schema (CC > App Form) v3

FIELD	LABEL	TYPE	REQ
full_name	Full Name	string	Yes
dob	Date of Birth	date	Yes
address	Address	string	Yes
employment	Employment	enum	Yes
phone	Phone	number	No
signature	Signature	sig	Yes

+ Add Field

Version History

+ Add Project

## Admin: Assignment Rules

Clave



Home

ADMIN

Users

Projects

Schema

Assign Rules

Models

Config

Analytics

## Assignment Rules

Project: BBVA

Flow: All

PROJECT	FLOW	DEFAULT METHOD	ELIGIBLE SPECIALISTS	MAX QUEUE	ESCALATION
BBVA	CC Application	Smart Assign	K., B., C.	10	Reassign after 4h
BBVA	Loan Application	Equal Distribution	K., B.	15	Admin alert after 8h
Santander	CC Application	Round-Robin	B., C.	8	Reassign after 4h

+ Add Rule

## Edit Rule — BBVA · CC Application

Default Assignment Method

 Equal
  Smart Assign
  Round-Robin

Eligible Specialists

 Rev. Spec. K.
  Rev. Spec. B.
  Rev. Spec. C.

Max Queue Depth per Specialist

Escalation Rule

 Reassign after 4h
  Admin alert after 8h
  No escalation

Cancel

Save Rule

## Admin: Model Manager

Clave



PK

Home

ADMIN

Users

Projects

Schema

Assign Rules

Models

Config

Analytics

## Model Versions

+ Deploy New Version

TYPE	VERSION	DEPLOYED	ACCURACY	STATUS	ACTIONS
<b>Classifier (RF-DETR)</b>	v2.4	2026-02-20	96.2%	Active	Current
Classifier (RF-DETR)	v2.3	2026-02-01	94.8%	Inactive	Rollback
<b>Object Detection (RF-DETR)</b>	v1.8	2026-02-15	93.7%	Active	Current
<b>PaddleOCR</b>	v3.1	2026-02-18	94.5%	Active	Current
<b>TrOCR</b>	v2.0	2026-02-10	95.1%	Active	Current
<b>EasyOCR</b>	v1.5	2026-01-28	91.3%	Active	Current

## Training Queue

127

samples pending  
Threshold: 150

Trigger Retrain Now

Auto-retrain triggers at 150 samples (configurable)

## Deploy New Version Steps

1. Upload new model weights
2. System validates format
3. Test inference on held-out sample
4. Accuracy comparison shown
5. Admin confirms deployment

## Admin: System Configuration

Clave



PK

Home

ADMIN

Users

Projects

Schema

Assign Rules

Models

Config

Analytics

## System Configuration

## Storage Paths

MongoDB Data Directory

Test

PDF Storage Path

Test

Image Crops Path

Test

Backup Destination

Test

Path changes require a service restart to take full effect.

## Default Thresholds

Classifier: 85%

OD: 75%

OCR: 80%

## Security &amp; Password Policy

Min Password Length

Complexity

Max Failed Logins

Password Expiry

## Notification Preferences

 Processing Complete  Review Needed  Pipeline Error (Admin)  Assignment Updates

All notifications delivered in-app only. Auto-dismiss after 24 hours.

Session Timeout

Retrain Threshold

Restart Services (Requires Confirmation)

## Admin: Analytics Dashboard

Clave



PK

Home

ADMIN

Users

Projects

Schema

Assign Rules

Models

Config

Analytics

## System Analytics (90 days)

## Pipeline Success Rate



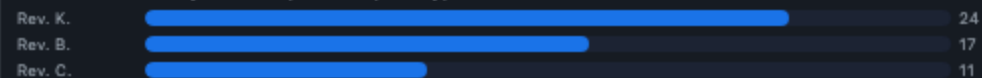
## Per-Field Accuracy Heatmap

Name 97%	DOB 94%	Address 78%	Phone 89%	Signature 65%
ID Num 96%	Expiry 92%	Income 81%	Employer 90%	Email 95%

## Top Failure Reasons



## Review Workload by Review Specialist (weekly)



## OCR Accuracy: Before/After Retrain

PaddleOCR: 92.1% → 94.5% TrOCR: 93.0% → 95.1%

# Clave



### 100% On-Premise

7 Docker containers, zero cloud



### 3 User Roles

Review Spec, Processing Spec, Platform Admin



### 7-Stage Pipeline

Pre-process → Classify → Validate → OD → OCR → LLM → Store



### 3 OCR + LLM

PaddleOCR + TrOCR + EasyOCR + Qwen 72B



### End-to-End Encrypted

LUKS + CSFLE + AES-256 + mTLS



### Active Learning

Silent, automatic OCR improvement



### Full Audit Trail

Immutable, hash-chained, tamper-evident



### Smart Assignment

6 methods for review task routing

## Questions?

Thank you