

# CalSAWS

California Statewide Automated Welfare System

## Design Document

CA-214907

DDID 2235

Task Management

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
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# 1 OVERVIEW

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This design outlines modifications to Task Management functionality within the CalSAWS System to provide access to images associated to Tasks.

## 1.1 Current Design

DDID 655 (CA-214929) introduced a set of Task pages that are accessible through a "Tasks" option in the Utilities navigation bar. These pages allow staff to manage and work Tasks independently of the main CalSAWS System window.

DDID 2254 (CA-214917) will introduce a set of Document Routing Rule pages that allow users to configure Task creation instructions based on specific documents that are imaged. This enhancement includes functionality to associate images to any resulting Tasks.

There are Task pages within the CalSAWS System that currently provide functionality to access related images with a "View Images" button.

The Task pop up pages per DDID 655 do not include capability to access images related to specific Tasks.

## 1.2 Requests

1. Update the pop up Task Detail page to include a button to allow viewing of images associated to the Task and documents received within a time period after the Task was created.
2. Update existing pages in the CalSAWS System that provide access to Task images to retrieve Task/Image associations resulting from DDID 2254.

## 1.3 Overview of Recommendations

1. Update the Task Pop-Up – Task Detail page to include a button to access images associated to the Task or images received within 30 calendar days after the Task was created.
2. Update the Task Detail page accessible through the Worklist and Worklist PR RE pages to include a button to access images associated to the Task or images received within 30 calendar days after the Task was created. This includes the Task Detail popup window and Task Navigation menu when initiating guided navigation.

## 1.4 Assumptions

1. The Images button described within this design will not be available to counties that have not been enabled on the Hyland imaging solution.
2. Task images buttons currently available to Los Angeles county will not be impacted if the county has not moved onto the Hyland imaging solution.
3. Enhancements CA-214038 (DDID 2508 - CalSAWS Images Buttons) and CA-214917 (DDID 2254, 2504 FDS: Task Mgt) will be completed and available in the CalSAWS System at the same time or prior to this enhancement.

- The necessary security right to support the new button has been introduced with CA-214038.

## 2 RECOMMENDATIONS

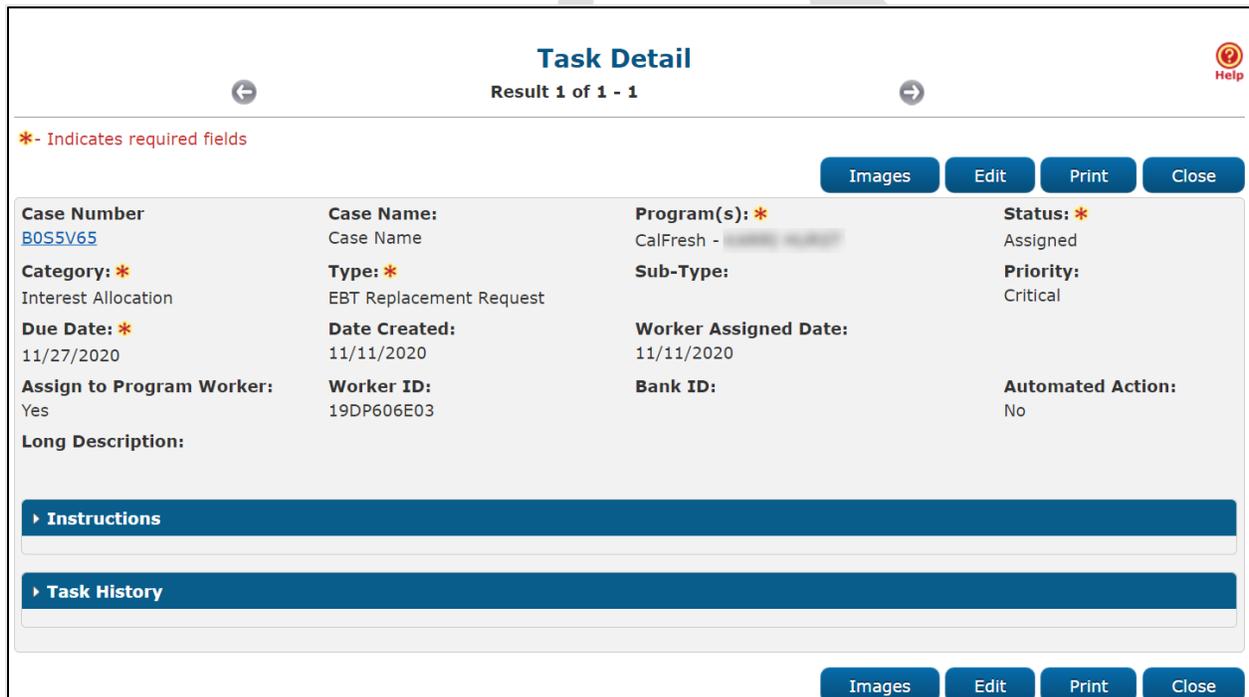
This section will outline recommendations to update the relevant Task pages in the CalSAWS System to allow access to imaged documents. The Images button's being introduced in the below sections are dependent on a county having Hyland as the imaging solution.

### 2.1 Task Pop Up - Task Detail

#### 2.1.1 Overview

The Task Pop-Up - Task Detail page is accessible from the Task Search page. This page can be used to view, edit, or create Tasks. This section will describe recommendations to update the Task Pop-Up - Task Detail page to allow access to related imaged documents

#### 2.1.2 Task Detail Mockup



The mockup shows a 'Task Detail' page with a title bar, navigation arrows, and a 'Help' icon. Below the title bar is a 'Result 1 of 1 - 1' indicator. A red asterisk indicates required fields. The main content area is divided into four columns of task details. At the top right of the content area are buttons for 'Images', 'Edit', 'Print', and 'Close'. At the bottom right are buttons for 'Images', 'Edit', 'Print', and 'Close'. Below the details are expandable sections for 'Instructions' and 'Task History'.

Case Number	Case Name:	Program(s): *	Status: *
<a href="#">B055V65</a>	Case Name	CalFresh - [REDACTED]	Assigned
<b>Category: *</b>	<b>Type: *</b>	<b>Sub-Type:</b>	<b>Priority:</b>
Interest Allocation	EBT Replacement Request		Critical
<b>Due Date: *</b>	<b>Date Created:</b>	<b>Worker Assigned Date:</b>	
11/27/2020	11/11/2020	11/11/2020	
<b>Assign to Program Worker:</b>	<b>Worker ID:</b>	<b>Bank ID:</b>	<b>Automated Action:</b>
Yes	19DP606E03		No
<b>Long Description:</b>			
▶ <b>Instructions</b>			
▶ <b>Task History</b>			

Figure 2.1.2-1 – Task Detail View Mode Mockup

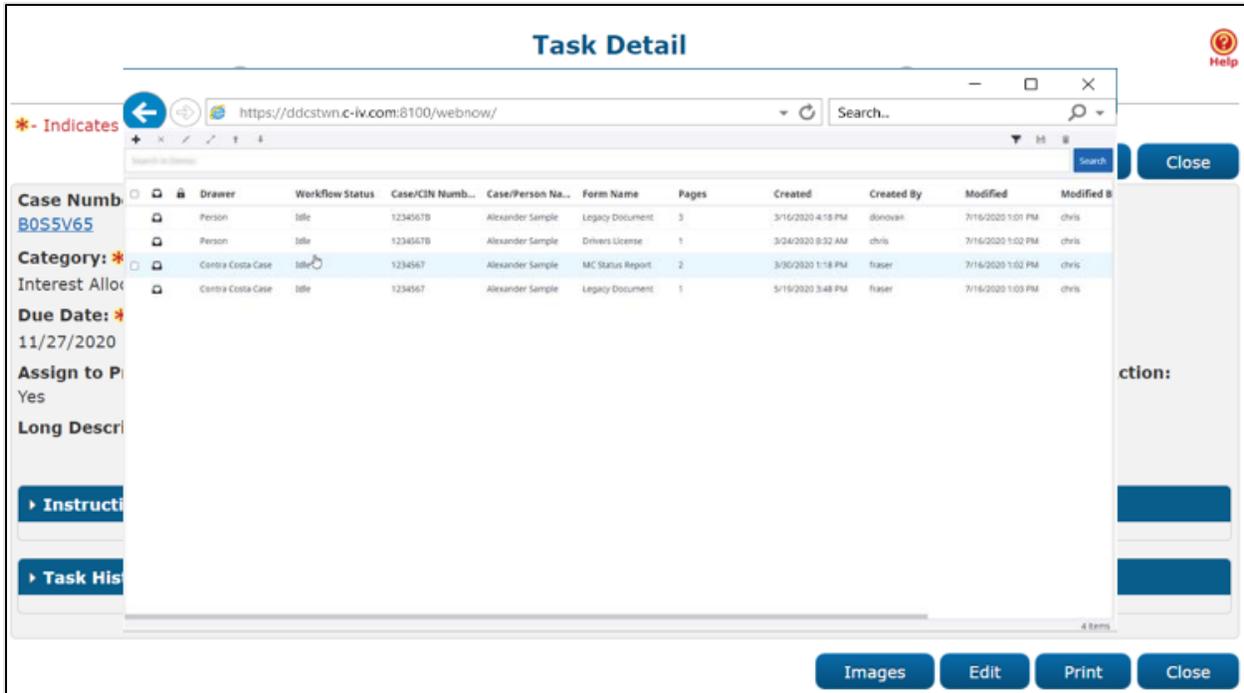


Figure 2.1.2-2 – Imaging Solution Window

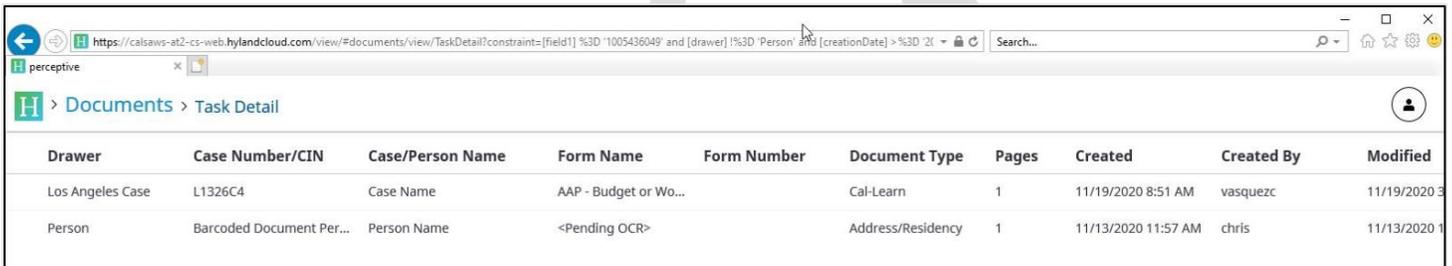


Figure 2.1.2-3 – Imaging Solution Window - Closeup

### 2.1.3 Description of Changes

Update the Task Detail page to include an “Images” button that allows the user to access imaged documents associated to the specific Task and documents imaged within 30 calendar days after the Task was created.

1. **BUTTON:** Images – This button will display to the left of the Edit button when the Task Detail page is in View or Edit mode. The button will display if the worker’s security profile contains the “ImagingSearchCase” or “ImagingSearchPerson” security rights, the imaging solution for the county is Hyland and the Task is associated directly to at least one image. If the imaging solution for the county is NOT Hyland or the Task is not associated to at least one image, the button will not display. The status of the Task does not impact the display of the Images button.

Upon clicking the Images button, a separate Imaging Solution (Hyland) window will pop up that is 850 pixels tall and 1500 pixels wide. Using the "Images" button multiple times will result in multiple Hyland windows. This window will operate independently. This window will include a listing of:

- Images associated directly to the Task on the Task Detail Page
- Images associated to the Case of the Task that have a Capture Time within 30 calendar days after the Task was created. If the Task is not associated to a Case, this condition will not apply.

For example: A document is imaged in on December 1<sup>st</sup>, 2020 and a Task is created per DDID 2254 functionality with the image associated to the Task. When clicking the Images button, the results that display in the Hyland window will include the image that was scanned on December 1<sup>st</sup> AND any additional images associated to the same Case between December 1<sup>st</sup> and December 31<sup>st</sup>(inclusive).

Note: Images associated directly to the Task that return within the Hyland results window are not distinguishable from images scanned within 30 days of the Task being created. The Image results will be ordered by Capture Time (Created - newest to oldest).

#### **2.1.4 Page Location**

N/A

#### **2.1.5 Security Updates**

N/A – No new security being introduced.

#### **2.1.6 Page Mapping**

N/A

#### **2.1.7 Page Usage/Data Volume Impacts**

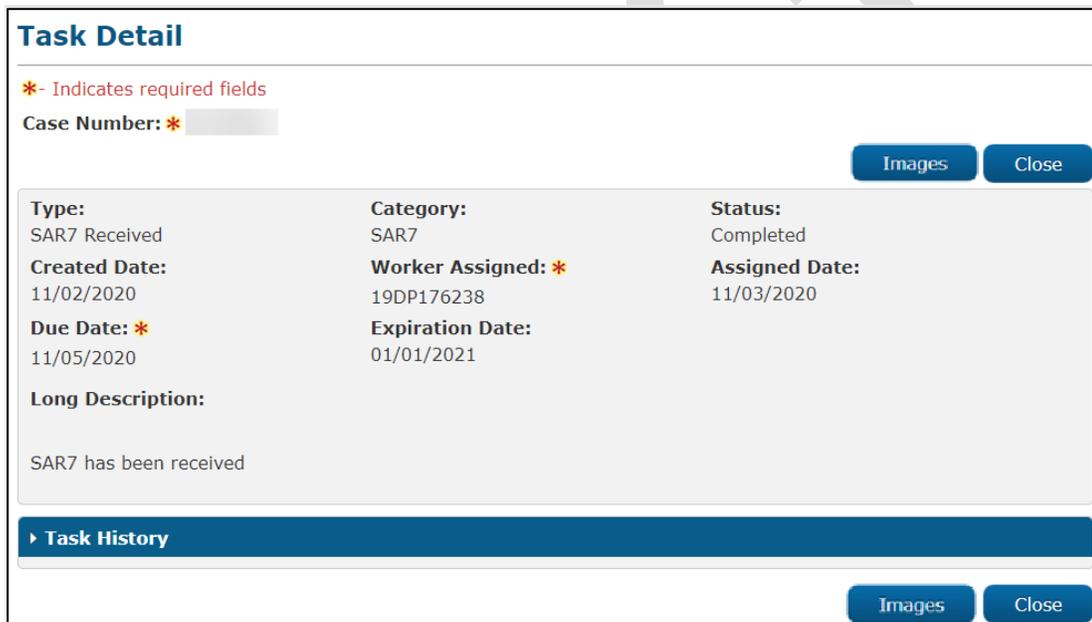
N/A

## 2.2 Task Detail – via Worklist Pages

### 2.2.1 Overview

The CalSAWS System includes a Task Detail page that is accessible via the Worklist and Worklist PR RE pages. This page currently displays a “View Images” button based on specific types of Tasks and if the Task is associated to an Image. This section will outline adjustments to this page to display an “Images” button intended to replace the “View Images” button once the county imaging solution becomes Hyland.

### 2.2.2 Task Detail Mockup



The mockup shows a 'Task Detail' window with a title bar and a close button. Below the title bar is a legend: '\*- Indicates required fields'. The main content area is divided into three columns for metadata: Type (SAR7 Received), Category (SAR7), Status (Completed), Created Date (11/02/2020), Worker Assigned (19DP176238, marked as required), and Assigned Date (11/03/2020). Below this is a section for Due Date (11/05/2020, marked as required) and Expiration Date (01/01/2021). A 'Long Description:' field contains the text 'SAR7 has been received'. At the bottom, there is a 'Task History' section with a right-pointing arrow and a blue header bar. Two 'Images' buttons are visible: one in the top right corner and one in the bottom right corner.

Type:	Category:	Status:
SAR7 Received	SAR7	Completed
Created Date:	Worker Assigned: *	Assigned Date:
11/02/2020	19DP176238	11/03/2020
Due Date: *	Expiration Date:	
11/05/2020	01/01/2021	

**Long Description:**  
SAR7 has been received

▶ Task History

Figure 2.2.2-1 – Task Detail View Mode Mockup

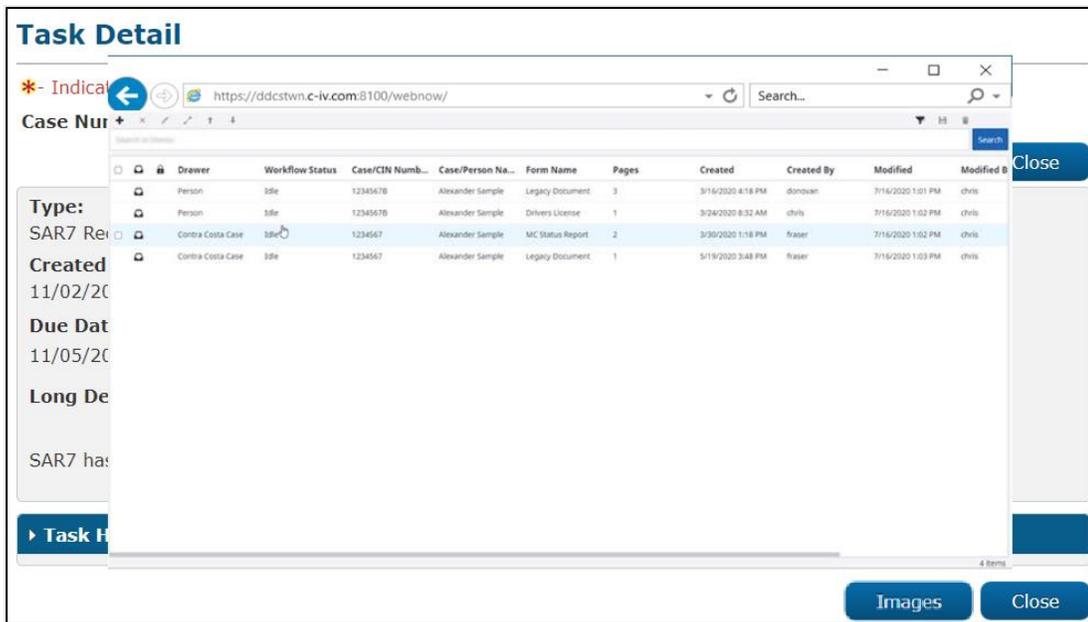


Figure 2.2.2-2 – Imaging Solution Window

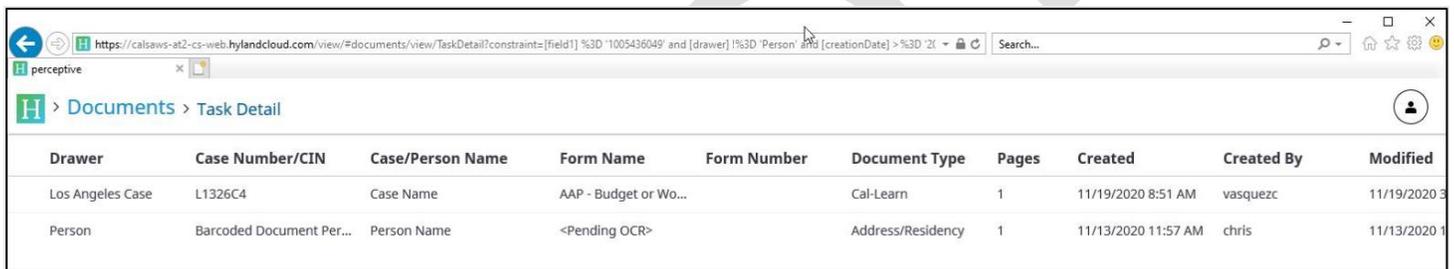


Figure 2.2.2-3 – Imaging Solution Window - Closeup

### 2.2.3 Description of Changes

Update the Task Detail page and Task Navigation menu that is accessible via the Worklist pages as follows:

1. Update the display of logic of the existing "View Images" **BUTTON** to no longer display if the county imaging solution is Hyland.
2. **BUTTON:** Images –This button will display to the left of any current buttons that display on the top and bottom of the page when the Task Detail page is in View or Edit mode. The button will display if the worker's security profile contains the "ImagingSearchCase" or "ImagingSearchPerson" security rights, the imaging solution for the county is Hyland and the Task is associated directly to at least one image. If the imaging solution for the county is NOT Hyland or the Task is not associated to at least one image, the button will not display. The status of the Task does not impact the display of the Images button.

When a user clicks the Task Type hyperlink to initiate guided navigation, the Task Detail pop up window that opens will also display the new button. When guided navigation is initiated, the Task Navigation menu refreshed into context of the Guided Navigation. This menu will also be updated to display the "Images" button beneath the Task Type name when the above criteria is true.

Note: This page may only display a single button to access images at a given point in time based on the current imaging solution for the county.

Upon clicking the Images button, a separate Imaging Solution (Hyland) window will pop up that is 850 pixels tall and 1500 pixels wide. Using the "Images" button multiple times will result in multiple Hyland windows. This window will operate independently. This window will include a listing of:

- Images associated directly to the Task on the Task Detail Page
- Images associated to the Case of the Task that have a Capture Time within 30 calendar days after the Task was created. If the Task is not associated to a Case, this condition will not apply.

For example: A document is imaged in on December 1<sup>st</sup>, 2020 and a Task is created per DDID 2254 functionality with the image associated to the Task. When clicking the Images button, the results that display in the Hyland window will include the image that was scanned on December 1<sup>st</sup> AND any additional images associated to the same Case between December 1<sup>st</sup> and December 31<sup>st</sup> (inclusive).

Note: Images associated directly to the Task that return within the Hyland results window are not distinguishable from images scanned within 30 days of the Task being created. The Image results will be ordered by Capture Time (Created - newest to oldest).

This button will not replicate the logic of the existing "View Images" button which has specific conditions to display if the Task Type is one of the following:

- Controlled Form
- Other CSC Task
- Point of Service Scans Received
- SAR7 Received
- SAR72 Received
- QR7 Received
- CF/CW RD Packet Received

- MC RD Packet Received
- CAPI/GR RD Packet Received
- Non-MAGI Turning 65 Packet Received
- Non-MAGI Screening Packet Received
- TNB4 Packet Received

With the introduction of the Document Routing Rule Detail page per DDID 2254, counties may configure Tasks to be created for any available Task Type resulting from a document image action. It is possible that images may be associated to any available Task Type based on county configuration.

## 2.2.4 Page Location

- **Global:** Case Info
- **Local:** Tasks
- **Task:** Worklist  
Worklist PR RE

## 2.2.5 Security Updates

N/A – No new security being introduced.

## 2.2.6 Page Mapping

N/A

## 2.2.7 Page Usage/Data Volume Impacts

N/A

## 2.3 Imaging Solution (Hyland) Interaction

### 2.3.1 Overview

This section outlines the attribute information that will be provided for processing on click of the “Images” button.

### 2.3.2 Description of Changes

1. The “Images” button provides the following information to the Image Retrieval URL process:

#### Tasks Created After Hyland Cutover

- a. Image UID(s) **(Required)** – All image UIDs associated to the Task.  
Note: A Task may be associated to one or more images directly.

- b. Case UID – The Case ID of the Case associated to the Task. This attribute will be used to retrieve additional images associated to the Case within 30 days of the Task being created. If this field is NULL, only images per the Image UIDs will be returned.
- c. Date Range – A 30 day date range beginning with the Task Creation Date. The end of the date range is 30 calendar days after the Task Creation Date (inclusive). This attribute will only be used if the Case UID is not NULL.

Tasks Created Before Hyland Cutover

At the time Los Angeles moves to the Hyland imaging solution, Tasks will exist in CalSAWS with a “View Images” button that would previously retrieve images from EDMS. After the move to Hyland, the images and specific attributes will be available in Hyland. If a Hyland “Images” button is available and is clicked for a Task that was created prior to the county moving into the Hyland solution, the following information will be provided:

- a. Case UID – The Case ID of the Case associated to the Task.
- b. Barcode Number – The barcode associated to the generated Customer Report that is associated to the Task.
- c. Date Range – A 30 day date range beginning with the Task Creation Date. The end of the date range is 30 calendar days after the Task Creation Date (inclusive).

- 2. Configure a “TaskView” Search Filter within Hyland to retrieve the appropriate images and display the information in the Hyland window.
- 3. Update the Image Retrieval URL process to receive the appropriate parameters and invoke the “TaskView” Search Filter within Hyland.

**2.4 [Automated Regression Test]**

**2.4.1 Overview**

[Provide an overview of the automated regression test that needs to be updated.]

**2.4.2 Description of Change**

- 1. [Provide a detailed description of what needs to be updated in the automated regression test.]
  - a. Sub point (if needed)
    - i. additional sub point (if needed)
      - 1. Additional sub point (if needed)
- 2. Next Change (if needed)

### 3 SUPPORTING DOCUMENTS

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N/A

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## 4 REQUIREMENTS

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### 4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2235	The CONTRACTOR shall update the Task Detail page to add a button for viewing documents associated to the task and documents received within a time period after the task was created. The images button must remain accessible on the Task Detail page, regardless of task status.	- Imaging system will support single sign on functionality for CalSAWS credentials.	This design will incorporate functionality into the Task Detail pages to allow access to imaged documents that are associated to the Task or associated to the same Case and received within a time period after the Task was created.

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## 5 MIGRATION IMPACTS

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N/A

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**6 OUTREACH**

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N/A

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## 7 APPENDIX

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