

CalSAWS

California Statewide Automated Welfare System

Design Document

DDID 2510

CA 214047– Append

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Imaging Team
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR

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1 OVERVIEW

1.1 Requests

Per DDID 2510, configure the imaging solution repository to append all documents where the indexing values are the same.

1.2 Overview of Recommendations

- Configure the imaging solution repository to append all documents where the indexing values are the same

1.3 Assumptions

- Documents migrated into the CalSAWS System will follow the same appending rules in the order they are processed into the Imaging Solution
- Security driving this process will be implemented in a subsequent SCR

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2 RECOMMENDATIONS

2.1 Overview

All images ingested into the Imaging Solution contain Indexing values that give searchable context to each image. Images with identical indexing values are assumed to be pages of one stored document and are to be combined. When appending a document, the origin/oldest version has priority over metadata retention. With the exception of scanning and page details (scanning user, scanning source, scanning time, last modified user, last modified time), all metadata of the appended/newest document will be discarded. Pages will append to the end of the origin/oldest document, but can be reordered by users with sufficient security rights.

2.2 Indexing Values

To facilitate this functionality the Imaging Solution will leverage the following indexing values to determine if a page should or should not append.

2.2.1 Case/Person Unique ID

The unique ID is set at a person or case level and is a system assigned value. This value will be obtained from CalSAWS by referencing the county code and case number of the document upon indexing or re-indexing. This unique ID is not made available to end users outside of the Imaging Solution.

2.2.2 Case Number or Client Index Number (CIN)

Once processed into the system, the case number is derived from the Unique ID and adds another layer of redundancy and searchability to the document. If the document is set to a person level scope, then this field will be populated with the Person CIN. Prior to indexing a document to a case or person, this field will be used to aid in document page ordering by the system with a sequence number.

2.2.3 Case Name or Person Name

Once processed into the system, the case name is derived from the Unique ID and adds another layer of redundancy and searchability to the document. If the document is set to a person level scope, then this field will be populated with the person name. Prior to indexing a document to a case or person, this field will be used to aid in document separation by the system with a unique identifier.

2.2.4 Applicable Date

The date on which a document is applicable to a specific program on a specific case. During the capture process this date will default to the date the document was scanned unless the user chooses otherwise.

2.2.5 Received Date

The date on which a document was received by a county. During the capture process this date will default to the date the document was scanned unless the user chooses otherwise.

2.2.6 Form Name

Form name will be populated by leveraging the barcode number, Optical Character Recognition (OCR), or manually in a re-indexing process. The form name serves as an identifier of the information contained in the document.

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3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2510	<p>The CONTRACTOR shall configure the imaging solution repository to append all documents where the following indexing values are the same:</p> <ol style="list-style-type: none"> 1) Case Number - Only for case level 2) Case Name - Only for case level 3) Document Type 4) Applicable Date 5) Received Date 6) Form Name 7) Form Number 8) Person Name - Only for person level 9) CIN - Only for person level 	<ul style="list-style-type: none"> • Documents migrated into the CalSAWS System will flow the same appending rules in the order they are processed into the Imaging Solution • Security driving this process will be implemented in a subsequent SCR 	<ul style="list-style-type: none"> • The imaging solution will be configured with the following primary indexing values to establish a baseline for documents to append: <ol style="list-style-type: none"> 1. Case Unique ID 2. Case Number, or CIN 3. Case Name, or Person Name 4. Applicable Date 5. Received Date 6. Form Name • Document Type, and Form Number will not be included in the primary keys, but as custom properties, as they are both derivative of a form name.

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