CalSAWS

California Statewide Automated Welfare System

Design Document

CA-228666

Update CalSAWS Imaging Buttons to Pull Case and Person Documents

DRAFT

CalSAWS	DOCUMENT APPROVAL HISTORY	
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1 OVERVIEW

As part of CA-214038 'Images' buttons were added throughout CalSAWS pages to allow users to retrieve documents directly from the Hyland Imaging Solution. These 'Images' buttons are able to retrieve either Case level documents, Person level documents or both, depending on which page the user clicked the 'Images' button from. This SCR will update CalSAWS to allow users the ability to retrieve both Case level documents and Person level documents from the Hyland Imaging Solution by clicking on the 'Images' buttons from anywhere the buttons appear in CalSAWS.

1.1 Current Design

Currently, there are certain pages in CalSAWS where the 'Images' buttons are only able to retrieve either Case level documents or Person level documents from the Hyland Imaging Solution and this is dependent on the page that the 'Images' button is clicked from.

1.2 Requests

Update CalSAWS to allow users to retrieve both Case level documents and Person level documents from the Hyland Imaging Solution by clicking on the 'Images' buttons from anywhere the buttons appear in CalSAWS.

1.3 Overview of Recommendations

1. Update all the 'Images' buttons that can only retrieve Case level documents to also retrieve Person level documents from the Hyland Imaging Solution.
2. Update all the 'Images' buttons that can only retrieve Person level documents to also retrieve Case level documents from the Hyland Imaging Solution.
3. Add additional document types that will need to be searched when the 'Images' button is clicked through the Case Summary page.

1.4 Assumptions

1. All existing functionality will remain unchanged unless it is a part of this SCR.
2. Los Angeles County is already using the Hyland Imaging Solution.

2 RECOMMENDATIONS

CalSAWS will be updated to allow users the ability to retrieve both Case level documents and Person level documents from the Hyland Imaging Solution by clicking on the 'Images' buttons from anywhere the buttons appear in CalSAWS.

2.1 Update Images Buttons to also pull Case level documents

2.1.1 Overview

Currently, in CalSAWS there are 'Images' buttons that are only able to retrieve Person level documents from the Hyland Imaging Solution. This SCR will update these 'Images' buttons to also retrieve Case level documents from the Hyland Imaging Solution.

2.1.2 Example Mockup

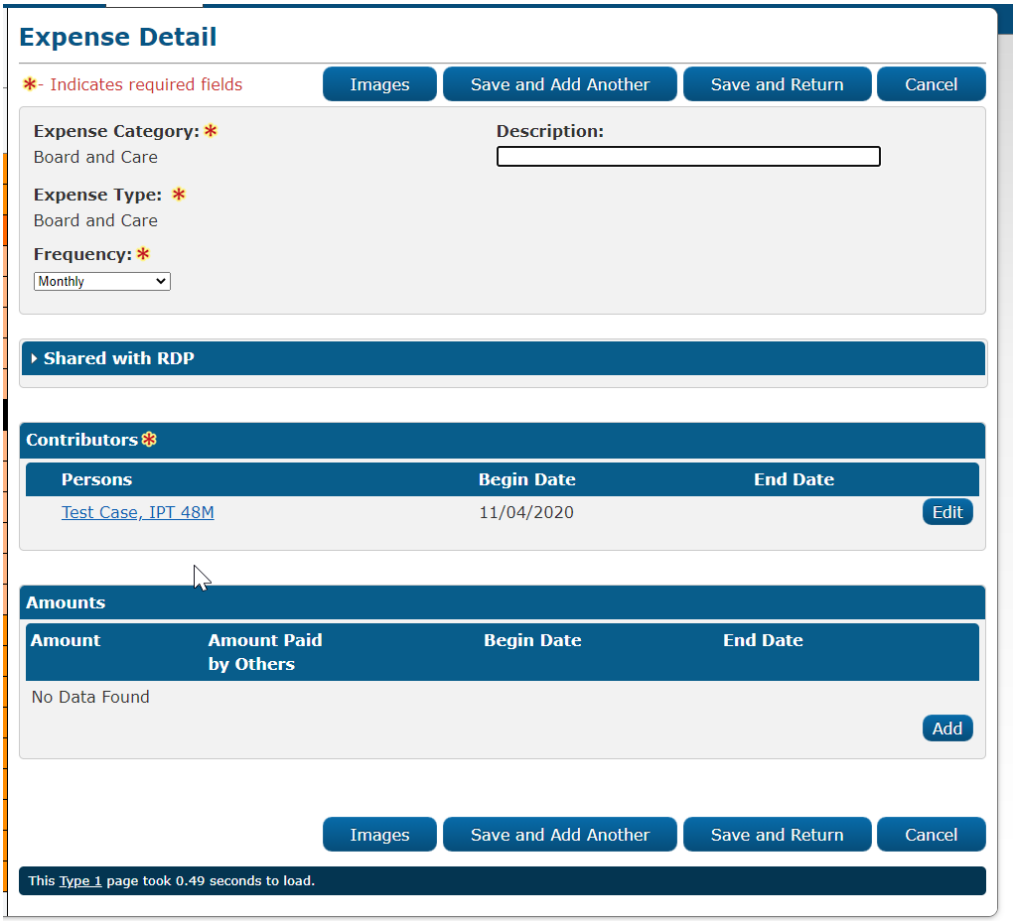

Figure 2.1.1 – Expense Detail (reference only)

2.1.3 Description of Changes

1. Update the 'Images' button located on the following pages referenced on the "Add Case level doc" sheet, on the CA-231137 Images button page locations_updates.xlsx to also retrieve Case level documents from the Hyland Imaging Solution.
    a. Expand the scope used to retrieve documents from the Hyland Imaging Solution to include Case level documents.
        i. Add the 'Case UID' to the existing parameters that must be sent to Hyland.
    b. Clicking on the 'Images' button will open the Hyland pop-up in a separate window and will now display both Case level documents and Person level documents.
    c. Update the 'Images' button to be available to users that have the 'ImagingSearchCase' security right.
        i. Users must either have the 'ImagingSearchCase' or the 'ImagingSearchPerson' security right in order for the 'Images' button to display.

    Note: Users will need to be assigned both the 'ImagingSearchCase' and the 'ImagingSearchPerson' security right to pull both types of documents in Hyland. For the 'Images' button to display in CalSAWS the user will only need either the 'ImagingSearchCase' or the 'ImagingSearchPerson'.
2. Update Imaging views scope to include 'Case and Person Level documents'.

Note: The 'Images' buttons located on these pages as referenced on "Add Case level doc" sheet, on the CA-231137 Images button page locations_updates.xlsx currently is only pulling Person level documents and require the user to have the ImagingSearchPerson security right in order to see the button. The above change will update the 'Images' button to now retrieve both Person level documents and Case level documents and will need the user to either have the ImagingSearchPerson or the ImagingSearchCase security right in order to see the 'Imaging' button.

2.1.4 Page Location

- **N/A**

2.1.5 Security Updates

The below Security Rights, Security Groups and Group to Role Mapping are already existing in CalSAWS and no changes are done to them as part of this SCR.

1. Security Rights

Security Right	Right Description	Right to Group Mapping
ImagingSearchCase	Allows view and search access to the user's county case drawer documents. Additionally, enables users with the required confidential security rights to view confidential documents via the case summary screen.	Imaging Search Case

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Imaging Search Case	Allows view and search access to the user's county case drawer documents. Additionally, enables users with the required confidential security rights to view confidential documents via the case summary screen.	Child Care Supervisor, Clerical Supervisor, Eligibility Supervisor, Employment Services Supervisor, Fiscal Supervisor, Hearings supervisor, Marketing Supervisor, Quality Assurance Supervisor, Quality Control Supervisor, Regional Call Center Supervisor, RDB Supervisor, Special Investigations Supervisor

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Update Images Buttons to also pull Person level documents

2.2.1 Overview

Currently, in CalSAWS there are 'Images' buttons that are only able to retrieve Case level documents from the Hyland Imaging Solution. This SCR will update these 'Images' buttons to also retrieve Person level documents from the Hyland Imaging Solution.

2.2.2 Example Mockup

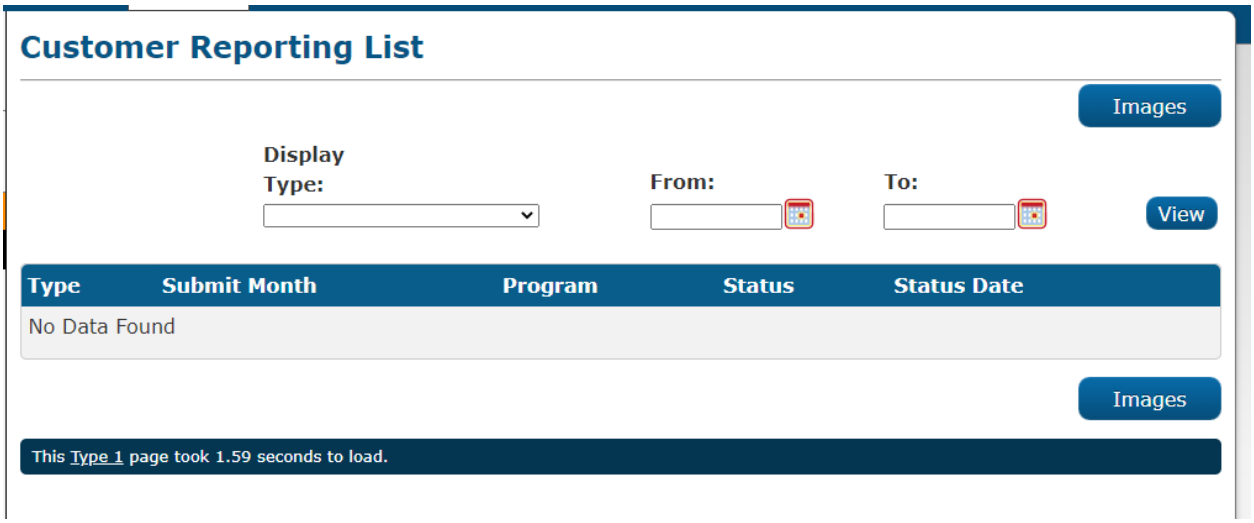

Figure 2.2.1 – Customer Reporting List (reference only)

2.2.3 Description of Changes

1. Update the 'Images' button located on the following pages referenced on the "Add Person level doc" sheet, on the CA-231137 Images button page locations_updates.xlsx to also retrieve Person level documents from the Hyland Imaging Solution.
    a. Expand the scope used to retrieve documents from the Hyland Imaging Solution to include Person level documents.
        i. Add the 'All Persons UID' to the existing parameters that must be sent to Hyland.
    b. Clicking on the 'Images' button will open the Hyland pop-up in a separate window and will now display both Case level documents and Person level documents.
    c. Update the 'Images' button to be available to users that have the 'ImagingSearchPerson' security right.
        i. Users must either have the 'ImagingSearchCase' or the 'ImagingSearchPerson' security right in order for the 'Images' button to display.

Note: Users will need to be assigned both the 'ImagingSearchCase' and the 'ImagingSearchPerson' security right to pull both types of documents in Hyland. For the 'Images' button to display in CalSAWS the user will only need either the 'ImagingSearchCase' or the 'ImagingSearchPerson'.

2. Update Imaging views scope to include 'Case and Person Level documents'.

Note: The 'Images' buttons located on these pages as referenced on "Add Person level doc" sheet, on the CA-231137 Images button page locations_updates.xlsx currently is only pulling Case level documents and requires the user to have the ImagingSearchCase security right in order to see the button. The above change will update the 'Images' button to now retrieve both Person level documents and Case level documents and will require the user to either have the ImagingSearchPerson or the ImagingSearchCase security right in order to see the 'Imaging' button.

2.2.4 Page Location

- **N/A**

2.2.5 Security Updates

The below Security Rights, Secure Groups and Group to Role Mapping are already existing in CalSAWS and no changes are done to them as part of this SCR.

1. Security Rights

Security Right	Right Description	Right to Group Mapping
ImagingSearchPerson	Allows view and search access to person drawer documents.	Imaging Search Person

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Imaging Search Person	Allows view and search access to person drawer documents.	Child Care Supervisor, Clerical Supervisor, Eligibility Supervisor, Employment Services Supervisor, Fiscal Supervisor, Hearings

Security Group	Group Description	Group to Role Mapping
		supervisor, Marketing Supervisor, Quality Assurance Supervisor, Quality Control Supervisor, Regional Call Center Supervisor, RDB Supervisor, Special Investigations Supervisor

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Update Images Buttons on Case Summary page

2.3.1 Overview

Currently, in CalSAWS when an 'Images' button is clicked on the Case Summary page, there's a list of documents types that is need to be searched. This SCR will add to the list of documents that will need to be searched when the 'Images' button is clicked through the Case Summary page.

2.3.2 Example Mockup

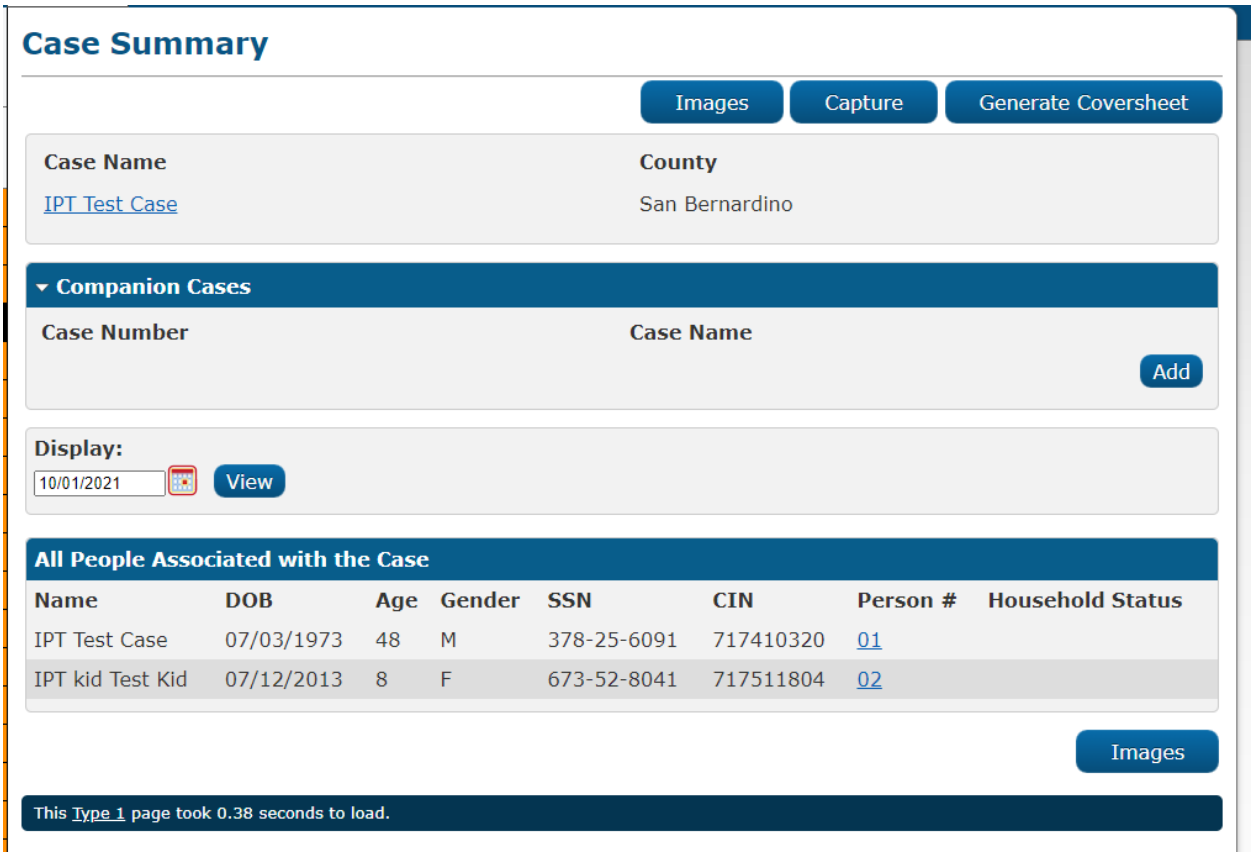

Figure 2.3.1 – Case Summary (reference only)

2.3.3 Description of Changes

1. Add the following document types and Form Names referenced on the "Add Document Types" sheet, on the CA-231137 Images button page locations_updates.xlsx to also be searched when the 'Images' button is clicked through the Case Summary page.
2. Update Imaging views scope to include the document types and Form Names as referenced on the "Add Document Types" sheet, on the CA-231137 Images button page locations_updates.xlsx.

Note: The 'Images' button will continue to search for the document types that was part of CA-214038. This SCR is expanding the list of document types that the will need to be searched when the 'Images' button is clicked through the Case Summary page.

2.3.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Case Summary**

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Update Hyland system to pull images with an open ended date range

2.4.1 Overview

Currently, in CalSAWS when an 'Images' button is clicked on various pages throughout the system, Hyland will not pull images that are greater than 365 days old. This SCR will update Hyland system to pull images that are greater than 365 days old when the 'Images' button is clicked from specific pages.

2.4.2 Example Mockup

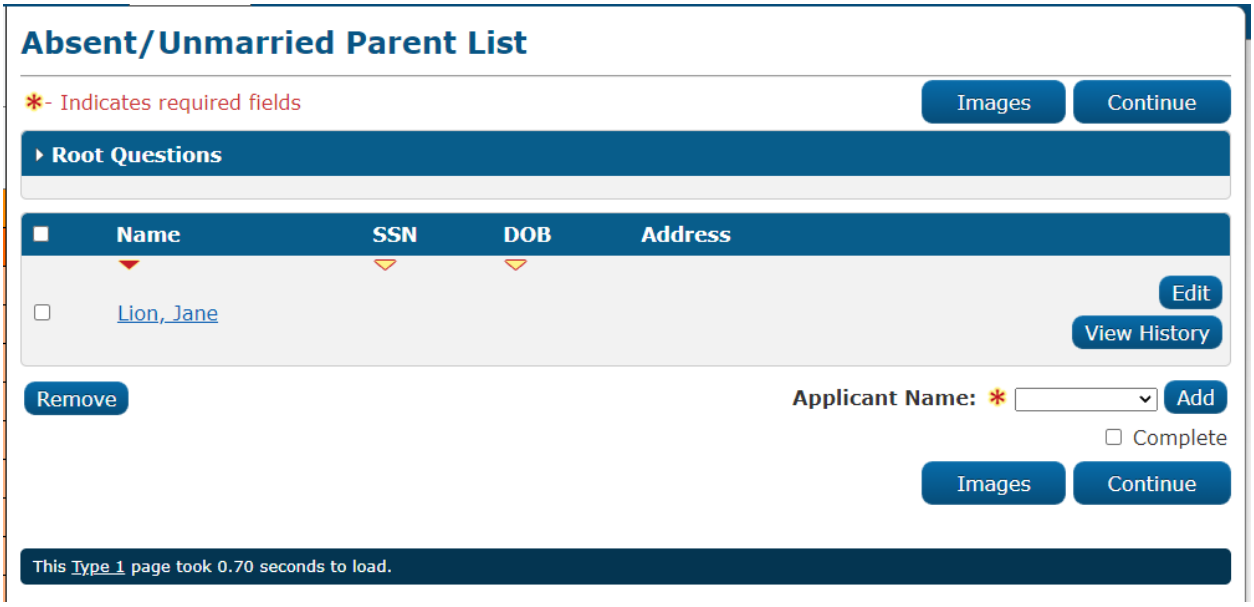

Figure 2.4.1 – Absent/Unmarried Parent List (reference only)

2.4.3 Description of Changes

1. Expand the date range in Hyland search parameter to allow images older than 365 days to be pulled, when the 'Images' button is clicked from the following pages:
    a. Income List
    b. Income Detail
    c. Individual Demographic List
    d. Individual Demographic Detail
    e. Vital Statistics List
    f. Vital Statistics Detail
    g. Military/Veterans List
    h. Military/Veterans Detail
    i. Relationship List
    j. Relationship Detail
    k. Medical Condition List
    l. Medical Condition Detail
    m. Absent/Unmarried Parent List

Note: No documents past 365 days old will be listed in the Hyland pop-up, when the 'Images' button are clicked from other pages in CalSAWS other than the ones listed above.

2.4.4 Page Location

N/A

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

N/A

2.4.7 Page Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

1	Online	List pages that the 'Images' buttons need to be updated.	CA-231137 Images button page locations updates.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.3.2.1.14	14. The LRS Component shall be scaleable and include the ability to process the current and expected growth volumes of transactions of the LRS, including growth for caseload, archive records, imaging, and Users.	CalSAWS is updated to allow users to pull both Case level and Person level documents from the Hyland Imaging Solution.