# CalSAWS | Proposed Mass Reindex of Backlog Imaging Queues



December 13, 2021

# Agenda

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# Overview

# SCR CA-237731 Mass Reindex of older documents in workflow queues

- Objective: The Project will create scripts to complete a mass, one-time clean up of the backlog of documents in the Imaging workflow queues.
- This will reduce the number document that require manual work in the queues.
- The target run date for the scripts is by January 31, 2022.

# CA-237731

# Global Assumptions

The following assumptions apply to all the scripts.

- Only the 39 counties currently using the Imaging Solution will be impacted.
- The script will not be customizable by County.
- The same logic will be applied to all of the workflow queues, including County, Office, and confidential queues.
- The script will be run one time only.

# Person Selection Reduction Approach

Proposed date range: documents that have been in the queue for more than
 15 days from the script run date.

### Requirements for a document to be included:

The document is not in a working state (a user does not have the document open)

## What will happen to the document(s):

- The document will be archived to the Case Number or CIN, whichever is in the document properties when the script is run.
- The searchable Legacy Index field will be updated to "Person Selection Cleanup."
- The document will be routed to archive.
  Note: Documents in the Person Selection queue have already been processed through task generation and merging.

## Person Selection Reduction Approach

## **Person Selection Mass Route Cleanup:**

Documents in this queue are already indexed to cases fully, and awaiting county action to optionally change the context to a person.

Impact will be 100% of documents within configured "older than" date range.

#### Misclassification Risk: Low

- No County Opt Out
- Documents are already indexed to appropriate case/form name
- Documents can be routed to Reindex All to update scope between case/person
- Searchable value added to document impacted "Person Selection Clean-Up"

# Exception Queue Reduction Approach

Proposed date range: batches that have been in the queue for more than 15 days from the script run date.

### Requirements for a batch to be included:

- The batch is not in a working state (a user does not have the document open)
- The County Code is not blank
- The form name is not "Unknown" or "<Pre-OCR>"

# What will happen to the batches(s):

- If there is more than one document in the batch, the document properties for the first document will be used.
   If there is only one document in the batch, the document properties will not be updated.
- All pages will be merged into the first document.
- The searchable Legacy Index field will be updated to "Exception Cleanup."
- The document will be routed to archive.
  Note: These documents will not generate a task.

## Exception Queue Reduction Approach

## **Exception Mass Route Cleanup**

Impacts subset of documents identified that have sufficient metadata information to automate archival.

Impacts an estimated ~66% of documents within configured "older than" date range.

## Misclassification Risk: High

- Documents are in this queue due to low classification confidence
- Correctly classified documents may be collapsed into an inaccurate classification
- No County Opt Out
- Self-Service-Other documents will be indexed with this value
- Can reduce risk to recent items with "older than" configuration
- Searchable value added to document impacted "Exception Clean-Up"

# Barcode Verification Reduction Approach

Proposed date range: batches that have been in the queue for more than 30 days from the script run date.

### Requirements for a batch to be included:

- The batch is not in a working state (a user does not have the document open)
- The County Code is not blank
- The form name is not "Pre-OCR" or "Unknown"

# What will happen to the document(s):

- If there is more than one document in the batch, the document properties for the first document will be used.
   If there is only one document in the batch, the document properties will not be updated.
- All pages will be merged into the first document.
- The searchable Legacy Index field will be updated to "Barcode Verification Cleanup."
- The document will be routed through task generation, merging, and archive.

# Barcode Verification Reduction Approach

## **Barcode Verification Mass Route Cleanup**

Impacts subset of documents identified that have sufficient metadata information to automate archival.

Impacts an estimated ~75% of documents within configured "older than" date range.

## Misclassification Risk: High

- Documents could have an invalid barcode
- Documents may create invalid tasks
- Documents may be marked received inaccurately
- No County Opt Out
- Can reduce risk to recent items with "older than" configuration
- Searchable value added to document impacted "Barcode Verification Clean-Up"