CalSAWS

California Statewide Automated Welfare System

DRAFT

Design Document

SCR CA-231814 – Add Detailed Workflow Indicator to Documents in RC

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Imaging Team
	Reviewed By	Imaging Team

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
4/8/2022	1.0	Initial Draft	Imaging Team

Table of Contents

1 OVERVIEW

Imaging end-users need an easier way of determining which queue their documents are in. This can be accomplished by adding a custom property with this information and leveraging it to modify the In Workflow grid column and RC Hold stamp to tell end-users which queue documents are in.

1.1 Current Design

Currently, users are only clearly told if a document is in workflow. There is not a specific indicator of which document the queue is in.

1.2 Requests

Users need a concise message to indicate which queue their document is in. This will help users determine what actions (if any) are needed.

1.3 Overview of Recommendations

- Add the new "Processing Queue" custom property to indicate the current workflow queue of original document.
- Update the "In Workflow" column to display the Processing Queue custom property.
- Update the records correction stamp to indicate the current workflow queue of original document. Make the updated stamp a link to the document if it is in a county-maintained workflow queue.

1.4 Assumptions

- This SCR will only apply to new documents imaged after the SCR is implemented. Documents already imaged will not be impacted until they are routed forward in workflow. Documents currently in a county-maintained workflow queue will not be reprocessed to update the stamp in the documents view.
- Documents in the QA & Indexing and No Case Assigned queues will not be impacted. These documents have not been submitted into workflow and have not been linked to a case in the Imaging Solution.
- These changes will only apply to Counties using the Imaging Solution at implementation. Remaining counties who will go-live after the release date will inherit the functionality at go-live.

2   RECOMMENDATIONS

Add a Processing Queue custom property that can be leveraged to revise existing notifications to end users which queue documents are in.

2.1   Processing Queue Custom Property

2.1.1   Overview

Add a "Processing Queue" custom property to original documents.

2.1.2   Description of Changes

Add a "Processing Queue" custom property to original documents. This custom property will display which queue the document is in. "System Queue" will display if the document is still going through backend System processing or in an Admin queue. If the document is in a workflow queue, this field will display the folder queue name, such as "Office 15 (EX – San Bernardino)". Potential user-accessible super queues documents can land in include:

- Barcode Verification
- Exception
- Person Selection
- Reindex
- Reindex All

The custom property will display for all major views and will not be hidden from end users.

2.2   Imaging Solution Grid Document Views

2.2.1   Overview

Change the In Workflow column in the Documents grid view to display the Processing Queue custom property.

2.2.2   Grid Document Views Mockup

Figure 2.2.2.1 – Grid Document View - Processing Queue Column
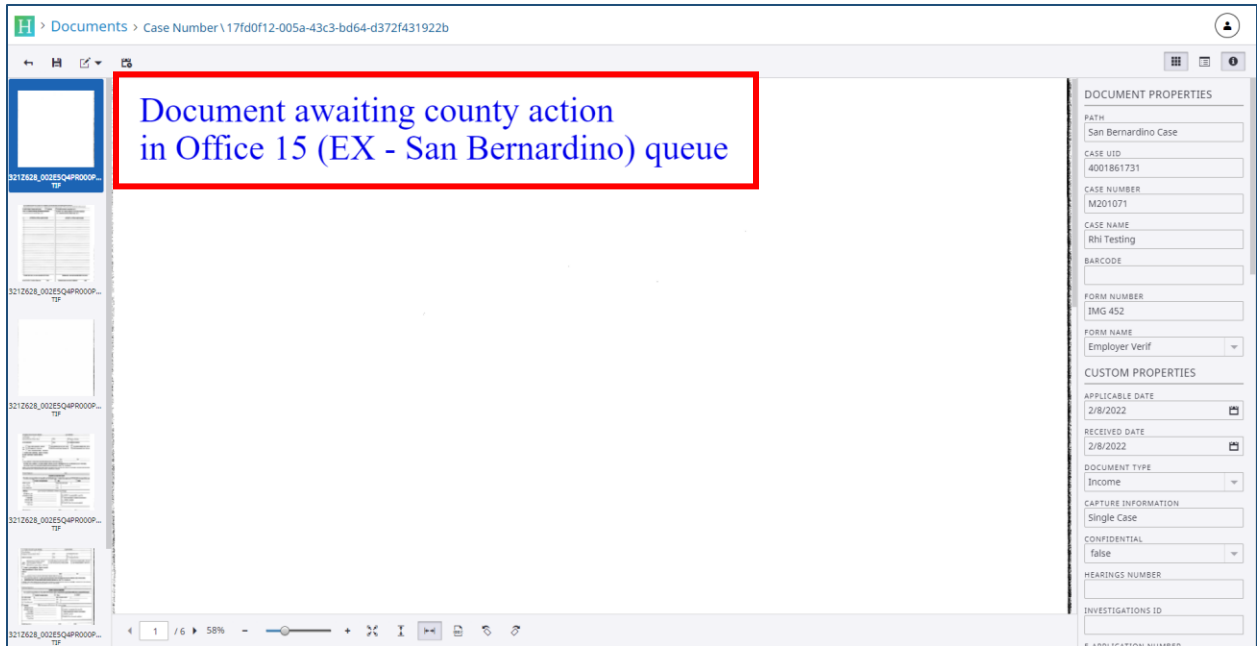
2.2.3 Description of Changes

Update the "In Workflow" column in the Documents grid view to display the Processing Queue custom property. If the document is archived and not in workflow, the column will be blank. Rename the column to "Processing Queue." These updates will apply to the All Case Archive and All Person Archive views only.

2.3 Imaging Solution Document Views
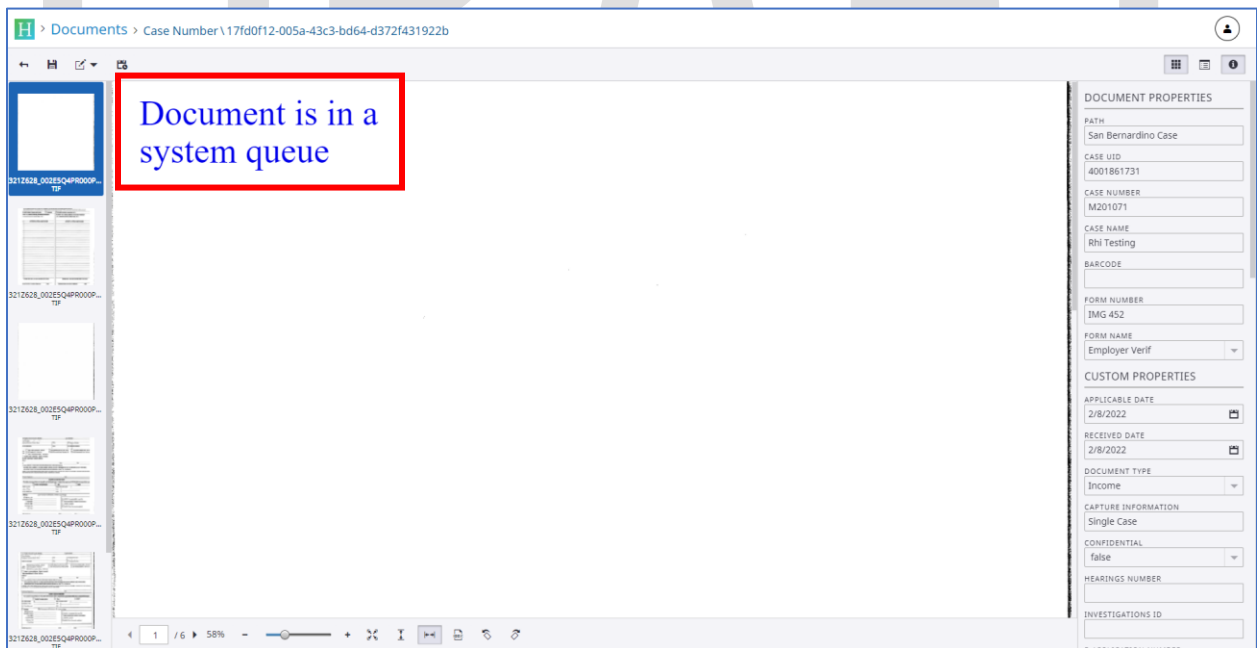
2.3.1 Overview

Update the RC stamp to indicate the current queue of the original document and make the stamp a clickable link to the original document in workflow.

2.3.2 Document Views Mockup

Document View – Document in workflow queue

Figure 2.3.2.1 – Workflow Queue Stamp

Document View – Document in system or admin queue

Figure 2.3.2.2 – System Queue Stamp

2.3.3 Description of Changes

Change the wording of the Records Correction and RC Hold stamps to accurately reflect which queue the document is in, based on the Processing Queue custom property. If the document is in a county-maintained workflow queue, the stamp should display "Document awaiting county action in <folder queue name> queue". If the document is in a System or Admin queue, the stamp should display "Document is in a system queue".

If the document is in a county-maintained workflow queue, update the stamp displayed on the copy to a URL. The URL will open the folder for the original item in the Barcode Verification, Exception, Person Selection, Reindex, or Reindex All queues. The stamp will still display the display "Document awaiting county action in <folder queue name> queue" verbiage.

If a user clicks on a URL for a document that has already been routed of the county-maintained workflow queue, they will receive an access denied error.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
DDID 2199	The CONTRACTOR shall configure the core capture and indexing scan modes (Single Case, Virtual Print, and Multi-case) to do the following: 1) Automatically categorize all system generated documents. 2) Automatically categorize up to 70 person level/verification documents. 3) Read the form number from a specified location on the document(s) to be determined during detailed design. 4) Capture the Form Name, Form Number, Case Name, Case Number, and Document Type as key metadata. 4a) Documents with no case number are automatically sent to a quality assurance queue for review. 5) Compare the confidence score of all automatically categorized documents to a confidence threshold. 5a) All scanned documents that do not meet the categorization confidence threshold are sent to a quality assurance queue for review. All cases associated the document that does not meet the confidence thresholds will be sent to a quality assurance queue for review. 6) Designated staff to be prompted to select case member, multiple persons, or no person option for all person level document types which will be determined during detailed design.	Updates allows users to more easily access the validation queues for further quality assurance after OCR processing.