

- CalSAWS M&E CalWIN Migration

Distribution Date:	April 19, 2022
To:	PPOC.18; IPOC.CalWIN.ALL; TPOC.CalWIN.ALL; Committee.Imaging.All; Consortium.RegionalManagers.All
CIT Name:	CalWIN Transition to CalSAWS Imaging Preparation Activities
From:	CalSAWS Project

PPOCs, please forward to the appropriate impacted staff in your county:

- | | |
|---|--|
| <input type="checkbox"/> General
<input type="checkbox"/> Policy
<input type="checkbox"/> CW
<input type="checkbox"/> CF
<input type="checkbox"/> MC
<input type="checkbox"/> CMSP
<input type="checkbox"/> FC/KG/AAP
<input type="checkbox"/> Child Care
<input type="checkbox"/> WtW
<input type="checkbox"/> Other Program(s) _____
<input type="checkbox"/> BenefitsCal <input type="checkbox"/> Your Benefits Now!
<input type="checkbox"/> Customer Correspondence
<input type="checkbox"/> Other _____ | <input type="checkbox"/> Reports
<input type="checkbox"/> Fiscal
<input type="checkbox"/> Caseload Movement
<input type="checkbox"/> Management
<input type="checkbox"/> Fiscal
<input type="checkbox"/> Security
<input type="checkbox"/> Batch and Interfaces
<input checked="" type="checkbox"/> Imaging
<input checked="" type="checkbox"/> Migration
<input type="checkbox"/> Conversion
<input checked="" type="checkbox"/> Technical
<input type="checkbox"/> Training
<input type="checkbox"/> Help Desk |
|---|--|

<p>Description: (Including any step-by-step instructions)</p>	<p>Purpose The purpose of this CIT is to provide the CalWIN Counties with information on the Imaging-specific activities that need to be completed before each County's respective go-live.</p> <p>Background In preparation for the CalWIN Counties go-live on the CalSAWS Imaging Solution, Counties will need to complete the following activities before their go-live. Activities are separated by technical and functional areas for easier distribution within the County. Completion dates for each County will vary by Wave and will be distributed in the Readiness Checklist.</p> <p>County Action: The actions outlined below will require the involvement of county technical staff, as well as county staff who conduct internal audits and those who make policy decisions on Forms numbers related to Imaging.</p> <p><u>Technical Requirements</u></p> <p>Web Scan Toolkit and Hyland Virtual Printer</p>
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Workstations must have the Web Scan Toolkit and Hyland Virtual Printer installed to use all scanning features of the CalSAWS Imaging Solution. The Web Scan Toolkit includes a browser extension which allows users to scan documents into the Imaging Solution. The Hyland Virtual Printer allows users to directly capture almost any document, web page, email, etc. into the Imaging Solution without physically printing the document.

Counties must coordinate with their Technical Point of Contact (TPOC) and IT support sections to download and install the Web Scan Toolkit and Hyland Virtual Printer on all workstations that will be used to scan and/or virtually print to the CalSAWS Imaging Solution. The Toolkit requires Visual C++ 2013 x86 and the Virtual Printer requires Visual C++ 2015 x64 before deployment.

County PPOCs can download the Toolkit, Virtual Printer, and Visual C++ from the CalSAWS Web Portal here:



The attachment "Web Scan Toolkit and Virtual Printer Installation" includes general installation and testing instructions.

To install the Virtual Printer via System Center Configuration Manager (SCCM), there are specific instructions and a configuration file in the Web Portal path below. Installing the Toolkit does not require separate steps or configurations when using SCCM.



Counties can test the Virtual Printer before go-live in the Training environment. There are Training environment-specific configurations for the Virtual Printer provided in the first Web Portal path. Counties can also test the Toolkit in the Training environment, and do not need specific configurations.

It is always advisable to make sure the drivers (i.e., the Pixel/TWAIN drivers) for your county's scanners used are up to date.

Allow-list Hyland Domain

The CalSAWS Imaging Solution requires Counties to allow-list a new URL that supports the use of the Imaging Solution. The County must complete required changes to enable county workstations and endpoints with the network permissions required (allow-list in firewalls, proxy, threat detection engines) to access the production CalSAWS Imaging Solution services over extranet. This action will need to be completed before the Imaging Admin User Acceptance testing (UAT), starting July 11, 2022 for participating counties.

Note: the IP for the Hyland domain is dynamic and changes hourly.

Domain to be allow-listed: ***.hylandcloud.com**

Imaging Audit URL

Users with the "Imaging Audit" security right can access the Imaging Audit tool, the IBM Cognos Analytics business intelligence, to complete audits of user actions in the CalSAWS Imaging Solution. The Audit tool allows users to view actions taken by others in the Imaging Solution, including:

- **Indexing Change:** Summary of document(s) with document properties that were updated by the specified user(s) within the specified date range and grouped by workflow queue/drawer. Contains the previous and new values, previous and new locations, if applicable
- **Viewing Documents:** List of document(s) viewed by the specified user(s) within the specified date range, and grouped by drawer
- **Deleted Documents:** List of document(s) deleted by the specified user(s) within the specified date range
- **Exporting:** List of document(s) exported by the specified user(s) within the specified date range. Contains information that can be used to locate the exported document
- **Searching:** List of all predefined and advanced searches executed by the specified user(s) within the specified date range

A direct link to the Audit tool will be added to CalSAWS with CA-233008. The release for this SCR is currently **TBD**. Until the SCR is implemented, counties may optionally create links to the Audit tool on desktops, County Intranet, or wherever it may be accessed by the necessary users.

Link to the Audit tool:

<https://calsaws-cs.hylandcloud.com/ibmcoanos/bi/?perspective=home>

Functional Activities

Add Imaging form numbers to County forms

The CalSAWS Imaging Solution has Optical Character Recognition (OCR) that will attempt to index documents based on the form number printed on the bottom left of a document. Counties may incorporate Form Numbers from the [Imaging Form Name Matrix](#) onto their County created forms so OCR can leverage the printed numbers to assist with indexing. The current Imaging Form Name Matrix can be found on here:



Location: The last line on the bottom left, with no text to the immediate right of the form number

Font: Arial, Times New Roman, or Courier

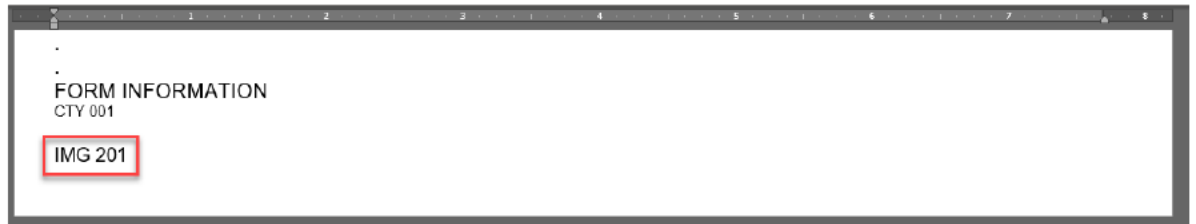
Font size: 8,10, or 12

Text direction: Horizontal

Margins at minimum: Left .3 in, bottom .3 in (make sure to consider your County's scanner margins)

Any combination of the above requirements can be used. In general, a blank line between the imaging form number and other information on the page is recommended. The following is an example of what the printed form number should look like in the red box.

Note: the red box was included for demonstration purposes only and should not be included on forms.



Handwritten form numbers may be used but cannot be reliably read by OCR.

If your County would like to test this, you may send up to 10 samples to the Primary contacts listed on this CIT and copy your Regional Managers (RMs).

Create County Indexing Guide for Staff

CalWIN Counties will need to create county-specific indexing guides, to assist staff with indexing documents when they start imaging at go-live. An indexing guide lists commonly imaged documents, including County forms, verifications, or State forms not in CalSAWS, along with their associated Imaging Form Name (see attached Imaging Form Name Matrix for the list of available Imaging Form Names). OCR will automatically index CalSAWS barcoded forms and a wide variety of customer verifications (like IDs, check stubs, etc.). County forms will not be automatically indexed by OCR unless an imaging form number is added (see previous section). The Indexing Guide should be used to index these documents manually.

County indexing guides are iterative. They must be regularly maintained overtime as the Form Name Matrix is updated and forms used by the County are added and removed. Counties should ensure the indexing guide is agreed upon by all programs/departments.

An example of some commonly imaged documents is attached (CalSAWS Imaging Index Values Reference Guide 0.2) and may be used as a baseline to help counties get started. The sample Index Values Reference Guide can be found here:



If you have questions on this CIT, please reach out to the Primary Contacts listed below and cc your Regional Manager(s).

Primary Project Contact: (Name and email address)	Rhiannon Chin ChinR@CalSAWS.org
Backup Project Contact: (Name and email address)	Inez Finnigan FinniganI@CalSAWS.org
Attachments:	CIT 01 10-22 Web Scan Toolkit and Virtual Printer Installation.docx CIT 01 10-22 Imaging Form Name Matrix - Updated 3.24.22.xlsx CIT 01 10-22 CalSAWS Imaging Index Values Reference Guide 0.2.xlsx
Web Portal Link:	<div style="background-color: black; width: 80px; height: 20px; margin-bottom: 10px;"></div> <p>OR</p> <p>You may also retrieve the CIT document and attachments by following these steps:</p> <ol style="list-style-type: none"> 1. Click on the CRFIs & CITs link at the top of the page. 2. Click on the "CalSAWS Information Transmittal (CIT)" folder. 3. Click on the "2022" folder. 4. Click on the appropriate CIT # folder.

