

CalSAWS Imaging Solution

Imaging Overview

CalSAWS Imaging Solution

The CalSAWS Imaging Solution is the part of CalSAWS that handles documents. It allows staff to upload, view, and store document images.

The CalSAWS Imaging Solution has All-in-One access. Logging into CalSAWS automatically logs staff into Imaging.



CalSAWS Imaging Buttons

There are four buttons in CalSAWS related to Imaging.

Images



View documents associated to the current CalSAWS page

Capture



Upload documents to the current CalSAWS case

Generate Coversheet



Generate coversheets for the current CalSAWS case for document separation

Imaging



Launch the Perceptive Experience from any CalSAWS page

Perceptive Experience

Perceptive Experience is the web application that houses the Imaging functionality. It is opened from CalSAWS. No separate login is required.

Use predefined searches to find documents

Create and save custom searches to find documents

Capture and upload documents

Add annotations or notes to documents

Modify and manage pending documents in workflow queues*

Route documents to other workflow queues*

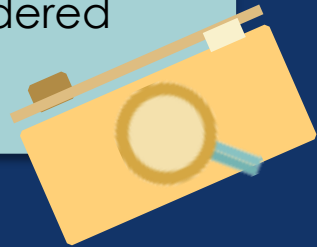
**Imaging workflow queues are used by workers to manage, update, and edit documents.*

CalSAWS Imaging Solution

Imaging Workflow Queues

Workflow Queues

The County-maintained workflow queues are used by workers to **manage and update documents**. A document that is in a workflow queue is pending finalization and is modifiable. Once a document has been indexed by either a worker or system process, it is removed from workflow and considered **archived** in the Imaging Solution.



Optical Character Recognition

Some capture modes leverage **optical character recognition (OCR) technology** to automatically detect key values from documents, reducing the need for manual processing. If further processing is required, documents will be **automatically routed** to County-maintained workflow queues. The CalSAWS Imaging Solution has predefined

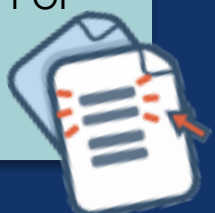
County-maintained workflow queues used to complete **pending actions**, such as updating document data, and more!



Four Key Queues Managed by Workers

1. **Exception Queue:** Documents that require the form name to be validated will be sent to Exception Queues.
2. **Reindex Queue:** Indexing values for documents that have been archived into the Imaging Solution can be updated using the Reindex Queues.
3. **Barcode Verification Queue:** Documents considered time sensitive by CalSAWS with barcode values that cannot be successfully obtained from CalSAWS will be sent to the Barcode Verification Queue for manual barcode verification.
4. **Person Selection Queue:** Documents indexed to a form name that have been determined to be a person level document will be sent to this queue to be linked to a CIN.

Note: Tasks are not created for documents in the Exception or Barcode Verification Queue until the document has been reindexed.



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Optical Character Recognition

Optical Character Recognition (OCR)

The Optical Character Recognition (OCR) technology is a new feature in the Imaging Solution that will **automatically detect and validate** certain key values from scanned documents. From here there are two paths:

Success: Key Values Validated

The OCR Service will automatically index other relevant properties, such as the Document Type, to the document. The documents will then be routed forward for system processing and archival.

Failure: Key Values Not Validated

The OCR Service will route the document to the appropriate maintained workflow queue for manual validation.

General Routing Process

Start

A worker logs in via Single Sign-On to CalSAWS, which includes Imaging.

Capture

The worker uploads customer documents using one of the available scan modes.

County-Maintained Workflow Queues

When the OCR service is unable to extract or validate the document's key values, the system automatically routes these documents to the appropriate County-maintained workflow queue, where a worker manually confirms key values and routes the documents forward for system processing.

Archival

After system processing, the documents are archived in the Imaging Solution for later retrieval, reindexing or removal, if necessary.

Benefits of OCR



Reduced time on manual indexing



Barcode recognition for more document types



More indexing values (such as Document Type, Form Names, etc.)