

# CalSAWS

California Statewide Automated Welfare System

## Design Document

CA-274726 Create Task Override Capture Profile

DRAFT

CalSAWS	DOCUMENT APPROVAL HISTORY	
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05/02/2024	1.0	Initial draft	Robyn Anderson
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# 1 OVERVIEW

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## 1.1 Current Design

Currently, users have several different capture modes to choose from when uploading document into the Hyland Imaging Solution. Each of those capture modes allows the users to set the Task Override flag to True or False, with False being the default. Setting the flag to True overrides any task configuration on the Document Routing page in CalSAWS and does not create a task for the document when it is scanned. If the user wishes to set the flag to True, they must do so for every individual document in the batch.

## 1.2 Requests

Create Task Override Capture Modes where the Task Override specialty flag is set to True by default.

## 1.3 Overview of Recommendations

1. Create Task Override Scan and Task Override File capture modes. These capture modes will differ from other capture modes by defaulting the Task Override flag to True.

## 1.4 Assumptions

1. Access to the new capture mode will be governed by the **Imaging No Task Creation Override** security right. No additional security rights will be required.
2. Workflow routing within the Imaging Solution will not change or be updated with this design.

# 2 RECOMMENDATIONS

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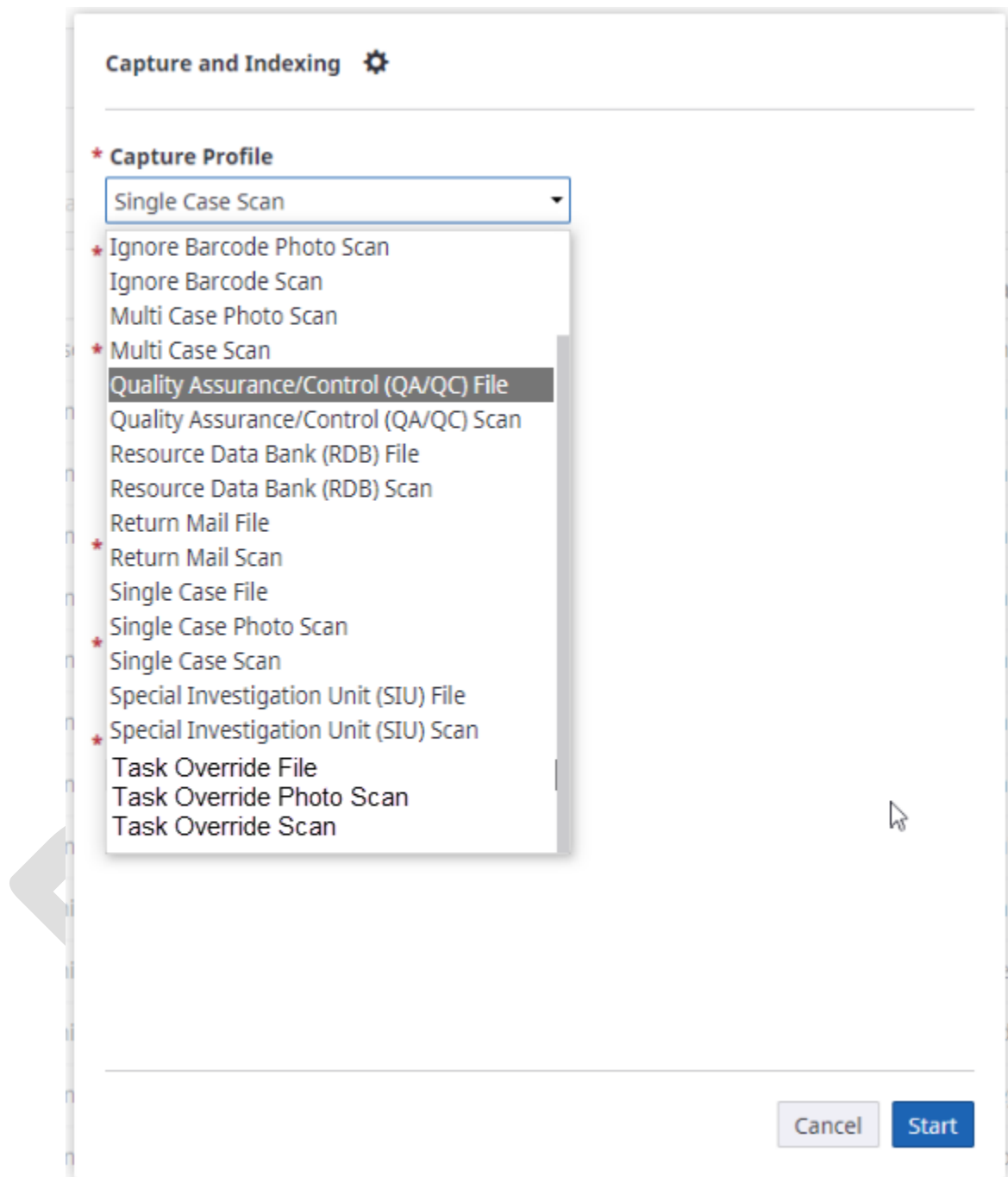
## 2.1 Task Override Capture Modes

### 2.1.1 Overview

Three new capture modes will be added to Imaging solution, Task Override Scan, Task Override Photo Scan and Task Override File. These new capture modes will default the Task Override specialty flag to True.

### 2.1.2 Description of Change

Three new capture modes will be added to the Capture Profile Dropdown menu on the Capture and Indexing screen.



**Figure 2.1.2.1 - Capture Mock up #1**

Once the user selects one of the Task Override Capture profiles the system will behave as it does for the Single and Multi Case capture profiles. The user will need to fill in Received Date, Applicable Date, Bundle ID, Origin, OCR Bypass and OCRSplitOverride fields. All fields except for the Bundle ID are mandatory. Received Date and Applicable Date will default to the current date, while the OCRBypass will default to False and the OCRSplitOverride will

default to True. The Origin depends on the user's security rights and assigned Worker Id in CalSAWS.

**Capture and Indexing** ⚙️

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\* **Capture Profile**  
Task Override Scan ▼

\* **Received Date**  
05/02/2024 📅

\* **Applicable Date**  
05/02/2024 📅

Bundle ID  
⬜

\* **Origin**  
07 - Contra Costa - County ▼

\* **OCRBypass**  
False ▼

\* **OCRSplitOverride**  
True ▼

Cancel Start

**Figure 2.1.2.2 - Capture Mock up #2**

On the QA page. The Task Override capture profiles will behave exactly as the Single Case and Multi Case capture profiles, except for the Task Override specialty flag, which will default to True instead of False as it does for other capture profiles. User may change the flag True to False on a per document basis.

If a barcode is present on the documents, the barcode will be read, and the case and form information will be filled automatically. If a barcode is not present, the user will need to supply the information.

User will be able to edit the following fields:



- Bundle ID
- Case Number (required to submit the batch)
- Barcode
- Form Number
- Form Name
- Applicable Date (required to submit the batch)
- Received Date (required to submit the batch)
- Hearings Number
- Investigations ID
- Notes
- Page Label

They will also be able to change the default values on the specialty flags:

- Task Override flag (defaults to True, this is the only capture profile where the default is true)
- No Change SAR7/QR7 flag (defaults to False)
- Person Override (defaults to False)
- OCRSplitOverride (defaults to True)
- OCRBypass flag (defaults to False)

Once the batch is submitted, the document will follow the usual Imaging Solutions Workflow routing rules. The Task Override flag set to True will prevent a task from being generated.

### 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
CA-214172	Capture	DDID 2242, 2500, 2501, 2502, 2503, 2267, 2255, 2516, 2517, 2518, 2204, 2521 - Multi, Import, Virtual Capture	 CA-214172 - Multi, Import, Virtual Capti
CA-214030	Capture	DDID 2198, 2242, 2255, 2500, 2501, 2502, 2503, 2516, 2517, 2521 - Capture Single and Barcode Detection	 CA - 214030 - Capture Single and

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