

# CalsAWS

California Statewide Automated Welfare System

## Design Document

CA-275753

Collapse Reindex Form Only into Reindex All

CalSAWS	DOCUMENT APPROVAL HISTORY	
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# 1 OVERVIEW

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## 1.1 Current Design

There are two Reindex queues with separate security rights. Reindex - Form Only allows users to edit the form information, applicable date, received date and county code. It does not allow users to change the case/person information.

Reindex All allows users to change the same information as Reindex - Form Only as well as the case/person information.

If a user needs to change the case/person information after archive, documents must be sent to Reindex All. If the user needs to change the form information, they have the choice of using either queue.

In the Add to Workflow screen, the options in the Select a queue drop down menu are listed as Document Requires Removal, Reindex – Form Only, then Reindex All.

## 1.2 Requests

- Merge the Reindex and Reindex Confidential queues into Reindex All and Reindex All Confidential, only keeping Reindex All and Reindex All Confidential.
- Reorder the Add to Workflow options so that Reindex All displays first and Document Requires Removal second. Remove the Reindex – Form Only option.
- Remove the Imaging Reindex and Imaging Confidential Reindex security rights from CalSAWS and the Imaging system.

## 1.3 Overview of Recommendations

1. Remove the Reindex and Reindex Confidential queues from the user interface and routing scripts. Move any documents in Reindex Form Only to Reindex All and documents in Reindex Confidential to Reindex All Confidential.
2. Rename Document Requires Removal to Remove Document in the Add to Workflow options drop down menu so that Reindex All is the first option listed. Delete the entry for Reindex - Form Only.
3. Delete the Imaging Reindex and Imaging Confidential Reindex security rights from CalSAWS and Imaging.

## 1.4 Assumptions

1. Document Routing will not change.
2. It will be the counties' responsibility to update their county-maintained security roles, or grant users the Imaging Reindex All or Imaging Confidential Reindex All rights as needed.
3. The Reindex All queue will work the same as it does today, and no functionality will change.

## 2 RECOMMENDATIONS

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### 2.1 Remove the Reindex queue.

#### 2.1.1 Overview

Removing the Reindex - Form Only queue will consist of several steps. All documents from Reindex will be moved to the corresponding Reindex All queue. Access to the Reindex - Form Only queue will be disabled in the user interface, and the queue will be removed from the routing scripts.

#### 2.1.2 Description of Change

All the documents in the Reindex and Reindex Confidential queues will be moved to the corresponding Reindex All and Reindex Confidential queue. This will be done manually by the Imaging Team using the routing functionality in the Hyland thick client. It is estimated that this should only take an hour based on the typical size of the queues.

The CI\_PrepForScanning script will be modified to use the Reindex All (FR) queue map, preventing any documents from routing to the Reindex – Form Only and Reindex Confidential queues.

Group access to the Reindex - Form Only and Reindex Confidential queues will be deactivated, removing them from the user interface after all documents have been moved to the corresponding Reindex All and Reindex All Confidential queues.

### 2.2 Add to Workflow Updates

#### 2.2.1 Overview

Two changes will be made to the Add to Workflow drop down menu. All references to the current Reindex – Form Only queues will need to be deleted and the Document Requires Removal option will be renamed so the county Reindex All queue will be listed first on the menu.

#### 2.2.2 Description of Change

The current Add to Workflow menu contains 3 options, in the following order: Document Requires Removal, Reindex Form Only, and Reindex All. Document

Requires Removal is not used nearly as much as Reindex All, so the order will need to be updated.

Remove <county code> Reindex -Form Only option. Rename the <county code> Document Requires Removal option to <county code> Remove Document so that the <county code> Reindex All option appears first on the menu and <county code> Remove Document will be second.

**Add to Workflow**

Select a workflow process:

Reindex Reasons

Select a queue:

36 - Reindex All

36 - Reindex All

36 - Remove Document

MEDIUM

Add Cancel

## 2.3 Update Security Rights

### 2.3.1 Overview

The Imaging Reindex and Imaging Confidential Reindex rights will be removed from both the CalSAWS and Imaging systems. Counties will be responsible for updating user security as needed.

### 2.3.2 Description of Change

Currently, there are four security rights that allow access to the Reindex queues.

- **Imaging Confidential Reindex:** Allows access to the Confidential Reindex queue and the ability to reindex document's Form Name, County Code, Applicable Date and Received Date.
- **Imaging Confidential Reindex All:** Allows user access to the Confidential Reindex All queue and the ability to reindex a document's Case/Person Name, Case Number/CIN, Form Name, County Code, Applicable Date & Received Date.
- **Imaging Reindex:** Allows user access to the Reindex queue and the ability to reindex document properties, excluding the Case/Person Name and Case Number/CIN.
- **Imaging Reindex All:** Allows user access to the Reindex All queue and the ability to reindex document properties, including the Case/Person Name and Case Number/CIN.

It is possible for a user to have any combination of the rights listed above.

The Imaging Reindex and Imaging Confidential Reindex rights will be removed, leaving the Imaging Reindex All and Imaging Confidential Reindex All rights.




In CalSAWS the Imaging Reindex and Imaging Reindex Confidential rights will be removed from the Security Assignment, Security Groups List, Security Rights List and County Security Role Detail pages. All security roles will lose Imaging Reindex rights when they are removed, and some project-maintained security roles will be updated to include the Imaging Reindex All security rights. These updates are outlined in the supporting document "Security Updates."

In the Imaging solution, once the Imaging Reindex and Imaging Confidential Reindex rights are removed from CalSAWS, the user sync job that syncs user security rights between CalSAWS and Imaging will remove those security rights from the users in the Hyland system. The <county code> Reindex and <county code> Confidential Reindex security groups will then be deleted from the Imaging solution.

The individual Counties will be responsible for updating any county specific security roles that contain either the Imaging Reindex or Imaging Confidential Reindex security rights.

The security rights currently needed to send a document to a queue are not changing with this SCR. The Imaging Reindex Route security right is still needed to send documents to Reindex All. The Imaging Document Remove security right is needed to remove documents.

### 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
CA-214058	Workflow	DDID 2519, 2261, 2515, 2198, 2505, 2522, 2199 - Environment Workflow Config	 CA - 214058 - Environment Workfl
	Security	CalSAWS Imaging Security Guide	 CalSAWS Imaging Security Guide 4.17..
	Security	Updates project-maintained security roles	 CA-275753 Security Updates.xlsx