

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-223790

Update External Staging Export and QA & Indexing
queue Retention Period

CalSAWS	DOCUMENT APPROVAL HISTORY	
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1 OVERVIEW

1.1 Current Design

Documents Uploaded to the county QA & Indexing queues within Imaging remain in the queue until a worker routes the documents forward or deletes them. This can lead to large and unmanageable queues.

Printing and downloading is not possible from the External Staging Drawer. Users have no way to print/download documents from that drawer.

1.2 Requests

Create a 14-day retention period for QA & Indexing so that documents that exceed that retention time are auto deleted after the retention period has passed.

Allow users to print and download from the External Staging Drawer.

1.3 Overview of Recommendations

1. Documents in the QA & Indexing queues that exceed the set retention period will be automatically deleted from the system.
2. Modify drawer privileges so users with the xx_Export security right can print and download documents that are in the External Staging drawer.

1.4 Assumptions

1. Workers will still be able to route documents in QA & Indexing forward as they do today. That process will not change.
2. Due to product limitations in the Hyland Perceptive Content product, all counties will have the same retention period for QA & Indexing. This cannot be set by county.
3. Enabling printing and downloading from the External Staging drawer will not require any code changes or updates to the Hyland system.

2 RECOMMENDATIONS

2.1 QA & Indexing Retention period

2.1.1 Overview

Documents in the QA & Indexing queues will be deleted after the retention period has expired.

2.1.2 Description of Change

1. A script will put in place that looks through each of the QA & Indexing queues to check the creation dates for each scan and delete any that exceed the 14-day retention period. This script will run once per day as a scheduled task.
2. This will be a hard delete; once the document is deleted, it cannot be recovered.

2.2 Print from External Staging Drawer



2.2.1 Overview

Changes will be made to the Drawer Privileges for the existing xx_Export groups (where xx= two-digit county code). Any users in this group will be granted the privilege of printing documents and downloading in External Staging. Only users in this group will have the rights to print or download documents.

2.2.2 Description of Changes

For each county, the existing xx_Export group will be updated in the Explore/Folder View section so that the Print Document privilege is enabled for the External Staging drawer. This privilege will grant the user the ability to both print and download documents.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
CA-214058	Workflow	Original Environment Workflow Config	 CA - 214058 - Environment Workflo
CA-214027	Security	CalSAWS-Hyland Security Mappings Content Revision2	 CalSAWS-Hyland Security Mappings C