

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-239033

 Hide Fields in Document Views 

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Robyn Anderson
	Reviewed By	Christopher Vasquez, Rhiannon Chin

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1 OVERVIEW

1.1 Current Design

When a user is searching for a document in the Hyland Imaging system, they are given a drop-down menu of fields to use as search criteria. However, that menu contains all fields possible in the Imaging system, including system fields that are hidden from the user everywhere else. This makes the list much longer than it should be and it can be difficult for the user to find the field they wish to use.

1.2 Requests

- Hide system fields in the drop down that workers do not use to specify their search criteria. Hide duplicate/similar named fields and any other fields the users are not normally exposed to.

1.3 Overview of Recommendations

1. Configure the drop-down menu on the search pages so that system fields and duplicate/similarly named fields are not visible to the user.

1.4 Assumptions

1. This is a configurable option and Hyland will not have to make any code changes to make this happen.

2 RECOMMENDATIONS

2.1 Hide fields in document views.

2.1.1 Overview

Currently, all fields that exist in the system, including ones not normally seen by end users, are present in the Hyland search pages. Hide system fields and duplicate/similarly named fields to reduce user confusion and make it easier to find the correct fields for a search.

2.1.2 Description of Change

Configure the drop-down menu on the Imaging system Document search pages to hide the following fields:

- Check out comments
- Checked out
- Checked out by
- Current Version
- Digital signature status
- Has hold applied
- Has physical file reference
- Has shortcut
- Hold name
- Is checked out
- Is in workflow
- Is private
- Is version controlled
- Next Task due
- Pending approval by
- Private by
- Summary task count (active)
- Summary task count (inactive)
- Summary task Status
- Workflow item ID
- Workflow queue
- Workflow user
- Batch Capture – Document
- Batch Capture – Documents
- Batch Capture - Origin
- Created (Duplicate field)
- Created By (duplicate field)

- Deleted By
- Document Copies
- Invalid Reason
- DOB
- SSN

Configure the drop-down menu on the Imaging system Capture and Indexing search pages to hide the following fields:

- Added to workflow date
- Added to workflow date range
- Folder creation date
- Folder creation date range
- Folder status
- Folder type
- Has required documents
- Queue start time
- Queue start time range
- Sate start time
- State start time range
- Workflow Item ID
- **Workflow item status**
- Workflow item type
- Workflow item user
- **Workflow queue**
- Batch Capture – Document
- Batch Capture – Documents
- Batch Capture – Origin
- DOB
- Document Copies
- SSN

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3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

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