ImagePRO - Indexing Website

Design Document

# Overview

The main purpose of this website is to provide an interface where operators can input data and generate printer-friendly barcode header sheets. The website will be hosted on DOR servers and a minimum of pass-through authentication will be required for access.

# Admin Experience

Users with admin access will require pages to provide the following functionality:

1. Job Setup
   1. Be able to create a new Job record in the JOB table. Job’s need an Abbreviation and a Name. (Example: PBPP – PA Parole Board)
2. Job Index Editing
   1. Each Job can have one, and only one, Index record in the JOB\_CONFIG\_INDEX table. As a minimum, the LABEL1 column must be populated.
   2. This table represents the Index values that operators will input and use to generate barcode sheets. They can have up to 5 index fields, but not all positions need to be utilized.
      1. Examples:
         1. LABEL1: State Parole Number
         2. REGEX1: /^SFN:[a-zA-Z0-9]+$/ (SFN1234B)
         3. LABEL2: Document Number
         4. REGEX2: /[0-9]+/ (240)
   3. The Labels will be determined by the Agency requesting the Job, and the regular expression formatting will be dependent on Agency rules. In some cases, no expression will be utilized for validation.
3. User Security Access
   1. Allow the admin to enter a username, and select which Job(s) they are allowed to access
   2. These pages will add/edit/delete records from the OPERATOR and OPERATOR\_ACCESS tables.

# User Experience

Agency end users will be given the ability to manually enter or import index information, view the indexes they have entered, and generate and print the barcode sheets.

1. Index Creation – Manual Entry
   1. If a user has access to multiple jobs, they’ll need an option to select the desired Job from a list. (JOB and OPERATOR\_ACCESS tables)
   2. After the Job is identified, labels and text boxes should be displayed for all Non-Null LABELx columns in the JOB\_CONFIG\_INDEX table.
      1. E.g. In the previous example, display labels “State Parole Number” and “Document Number”, along with text boxes for input.
   3. The operator should be able to enter the index information and then click save to record the index information to the INDEX\_DATA table.
      1. For each Index, the system needs to create a unique Barcode for linking and tracking purposes. This Barcode will tie the Index information to a given Document, and provide a reconciliation method to ensure each Index is accounted for after scanning/processing.
      2. Try to keep the barcode simple, and not too lengthy. I would suggest a daily counter, but am open to other options. You could use the JOB.Prefix, plus the date YYYYMMDD, plus a 5 digit counter.
         1. Example: PBPP2017051000001
      3. If going with the daily counter option, an additional table might be necessary for tracking. Keep in mind that there is potential for multiple operators generating index sheets at the same time.
   4. Some visual indication should appear for the operator to confirm the entry was saved. If successful, the fields should then automatically clear/reset and focus returned to the first text box so additional entries can be made.
   5. Try to keep the flow as smooth as possible, so that users can enter multiple indexes as quickly as they are able.
   6. A link can be made available here, as well as the main menu to #2 Print Index Sheets.
2. View/Print Index Sheets
   1. Display a grid of all the Index information entered by the current Operator (username) that has not already been printed (INDEX\_DATA table)
   2. Provide checkboxes next to each Index for selection purposes, along with a Select All button.
   3. A Print button should be displayed, which will print a barcode sheet for each Index.
      1. A new window should display with the Index sheets in a printer-friendly fashion, page separated, etc. Ideally it will automatically be sent to the printer.
      2. An Index sheet should:
         1. Display the unique Barcode information horizontally a few inches from the top of the page.
            1. Ideally, we’d have that barcode also printed vertically along the right-hand side of the page, as that helps at the scanner. But if that’s too tricky, at least start with the standard horizontal barcode.
         2. Further down on the page, the Index Data should be printed in a normal font.
   4. Ideally, the operator should be prompted with a message like “Did the Index sheets print correctly?”
      1. If they respond Yes, update the PRINTED value in the INDEX\_DATA table accordingly.
      2. Once an Index has confirmed that it was PRINTED, the record should essentially be locked. This is the starting point of tracking.
   5. This screen can also provide a Delete button, which would apply to the same checkbox selection criteria for each Index. Operators should only be able to Delete Index records that were not Printed.
3. View Index Status
   1. If a user has access to multiple jobs, they’ll need an option to select the desired Job from a list. (JOB and OPERATOR\_ACCESS tables)
   2. Default view will only show Index sheets that the operator created
   3. Provide a filter options to
      1. “show all sheets for all operators”
      2. Adjust the data range of Date/Time Created
      3. Only show Printed or Not Printed statuses
   4. Display a grid with the Index Data, Operator, Date/Time Created, Printed Status

# Advanced Features

Once the functionality described above is working correctly, the features described below should be developed.

1. Advanced Tracking
   1. We’ll need to link an ImagePRO Batch to a record in the INDEX\_DATA table, once a document with a printed Index Sheet has been scanned and the unique barcode identified. This might be as simple as adding a BATCH\_ID column to the INDEX\_DATA table and populating it from an ImagePRO workflow. Not all Jobs/Batches will necessarily be using these Index sheets, so it’s not one-to-one.
   2. The end goal for this is to provide Agency operators with the ability to view their Batch Status in real-time. With the BATCH\_ID linked, they should be able to see when we’ve started processing the work, when it has exported, transferred, etc. This will allow them to reconcile their Documents Indices, in addition to our own reconciliation.
      1. The View Index Status pages would need to be modified to include the Batch Status information. Appropriate filters could be added as well.
2. Load Index Data From CSV
   1. It should be straightforward for an operator to enter the Index information into a Spreadsheet and save it as a CSV. The operator could have an option to Load Index Data from CSV, where column 1 corresponds to Index 1, etc.
   2. The operator should be able to browse to their file, and then the Index data should be loaded and saved to the INDEX\_DATA table.
   3. In this case, the data could be displayed to the user one last time in a grid and they’ll be provided with an option to Save the information.
3. Regular Expression Validations
   1. Some agencies may way to ensure the operators Index information is conforming to a specific format. This is where if a Regular Expression exists in the JOB\_CONFIG\_INDEX table for a given field, a validation should run against the Index data entered by an Operator. Appropriate warning messages should be displayed if an entry violates the Regular Expression.