

14. DOCUMENT IMAGING.....2

14.1 SCAN A DOCUMENT DIALOG2

14.2 SCANNED DOCUMENT INFORMATION DIALOG5

14.3 SCANNED DOCUMENTS DIALOG8

14.4 ADOBE ACROBAT READER DIALOG11

14.5 REASSIGN DOCUMENT(S) DIALOG12

14. Document Imaging

Document imaging provides a simple function point that allows the user to scan a document and index it to a participant. In order to complete this process the user must have sufficient permissions and the participant must be checked in to the central server.

14.1 Scan a Document Dialog

The Scan a Document dialog allows the user to scan a document and index it to the selected participant. It is invoked when the user selects Activities -> Document Imaging -> Scan a Document menu from the Participant Folder.

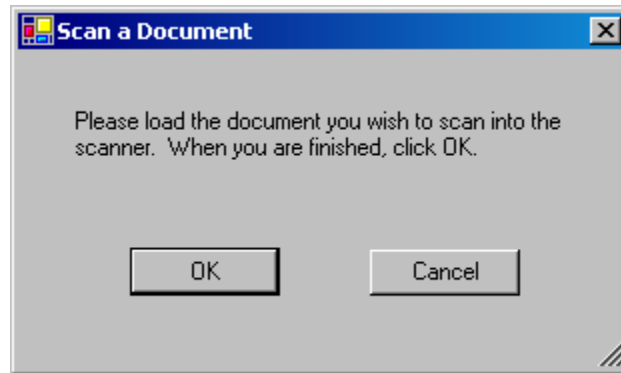


Figure 1 – Scan a Document Dialog (for State WIC ID only)

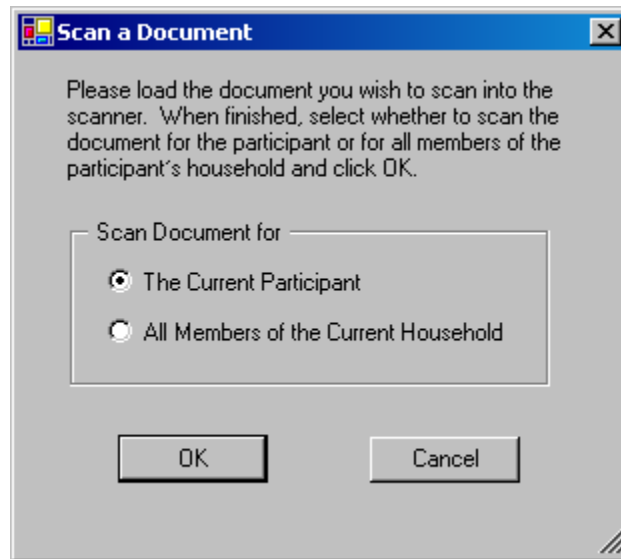


Figure 2 – Scan a Document Dialog (with State WIC ID and Household ID options)

14.1.1 Controls

This section describes the behavior of the controls on the dialog.

14.1.1.1 Scan a Document Text Label

This text label instructs the user to load the document they wish to scan into the scanner.

If the SCAN_DOCUMENTS_FOR_HOUSEHOLD business rule is set to “N”, the text label will be set to: “Please load the document you wish to scan into the scanner. When you are finished, click OK.”

If the SCAN_DOCUMENTS_FOR_HOUSEHOLD business rule is set to “Y”, the text label will be set to: “Please load the document you wish to scan into the scanner. When finished, select whether to scan the document for the participant or for all members of the participant’s household and click OK.”

14.1.1.2 OK Button

This control allows the user to begin scanning the document they have loaded into the scanner. Characteristics for the OK button are defined in [Consistencies](#).

14.1.1.3 Cancel Button

This control allows the user to exit the dialog without scanning a document. Characteristics for the Cancel button are defined in [Consistencies](#).

14.1.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Scan a Document dialog.

14.1.2.1 Initializing the Interface

Upon initial display of the dialog, the following occurs:

- The title bar text will be set to “Scan a Document”.
- If the SCAN_DOCUMENTS_FOR_HOUSEHOLD business rule is set to “N”, the Scan a Document text label will be set to: “Please load the document you wish to scan into the scanner. When you are finished, click OK.”
- If the SCAN_DOCUMENTS_FOR_HOUSEHOLD business rule is set to “Y”, the Scan a Document text label will be set to: “Please load the document you wish to scan into the scanner. When finished, select whether to scan the document for the participant or for all members of the participant’s household and click OK.”

14.1.2.2 Edits

There are no updateable controls on the Scan a Document dialog; therefore, there are no edits performed on this dialog.

14.1.2.3 Scan a Document

When the user selects the OK button, the system will scan the document which has been loaded into the scanner and display the Scanned Document Information dialog.

14.1.2.4 Cancel

Upon selection of the Cancel button, the system will dismiss the dialog and return to the Participant Folder window.

14.2 Scanned Document Information Dialog

The Scanned Document Information dialog allows the user to associate a Document Type and Comments with a scanned document. It is displayed when the user clicks OK on the Scan a Document dialog.

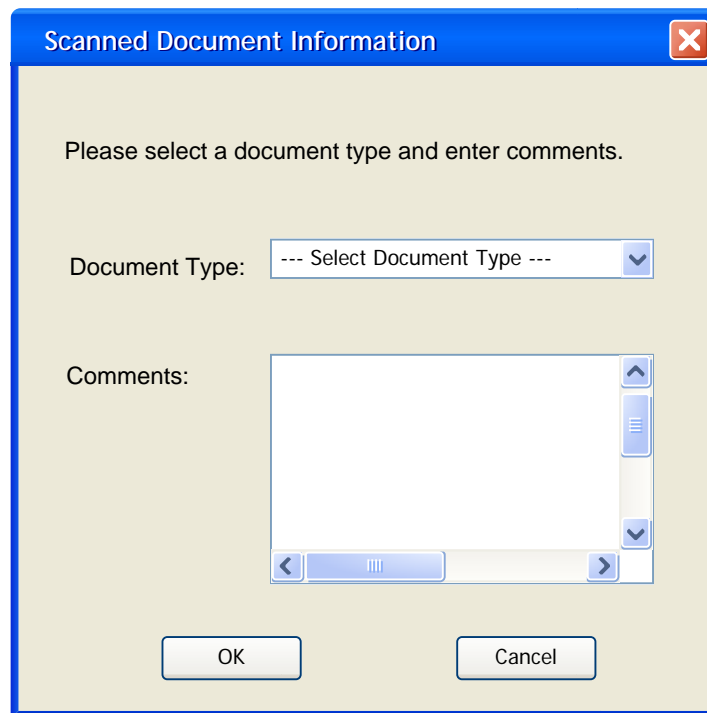


Figure 3 – Scanned Document Information Dialog

14.2.1 Controls

This section describes the behavior of the controls on the Scanned Document Information dialog.

14.2.1.1 Scanned Document Information Text Label

This text label instructs the user on how to complete the entry of this dialog.

14.2.1.2 Document Type Drop-Down

This control allows the user to select a Document Type to associate with the scanned document. It will display a list of document types from the table DocumentImageType.

14.2.1.3 Comments Text Box

This control allows the user to enter comments regarding the scanned document. It allows a maximum of 250 alphanumeric and special characters.

14.2.1.4 OK Button

This control allows the user to save the Document Type and Comments that have been entered. Characteristics for the OK button are defined in [Consistencies](#).

14.2.1.5 Cancel Button

This control allows the user to exit the Scanned Document Information dialog. Characteristics for the Cancel button are defined in [Consistencies](#).

14.2.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Scanned Document Information dialog.

14.2.2.1 Initializing the Interface

Upon initial display of the dialog, the following occurs:

- The title bar text will be set to “Scanned Document Information“.
- The scan a document text label will be set to “Please select a document type and enter comments.”

14.2.2.2 Edits

Upon selection of the OK button, the following edits occur:

- The system will verify that all required information has been entered.
- If no Document Type is selected the system will display a standard error message with the message text, “A selection is required in the Document Type.”
- If the Comments Text Box is blank, the system will display a standard error message with the message text, “An entry is required for the Comments.”

14.2.2.3 Display Scanning Confirmation

Upon successful completion of the above listed edits, the system will display a confirmation that the document has been saved and indexed to the selected participant as described in the Data Map below.

14.2.2.4 Cancel

Upon selection of the Cancel button, the system will dismiss the dialog without saving and return to the Participant Folder window.

14.2.2.5 Data Map

Control Label	Entity	Attribute	Business Rule
Document Type			
Comments			
Image??			

14.3 Scanned Documents Dialog

The Scanned Documents dialog allows the user to view, reassign, and delete scanned documents. It is invoked when the user selects Activities -> Document Imaging ->View Scanned Documents menu from the Participant Folder.

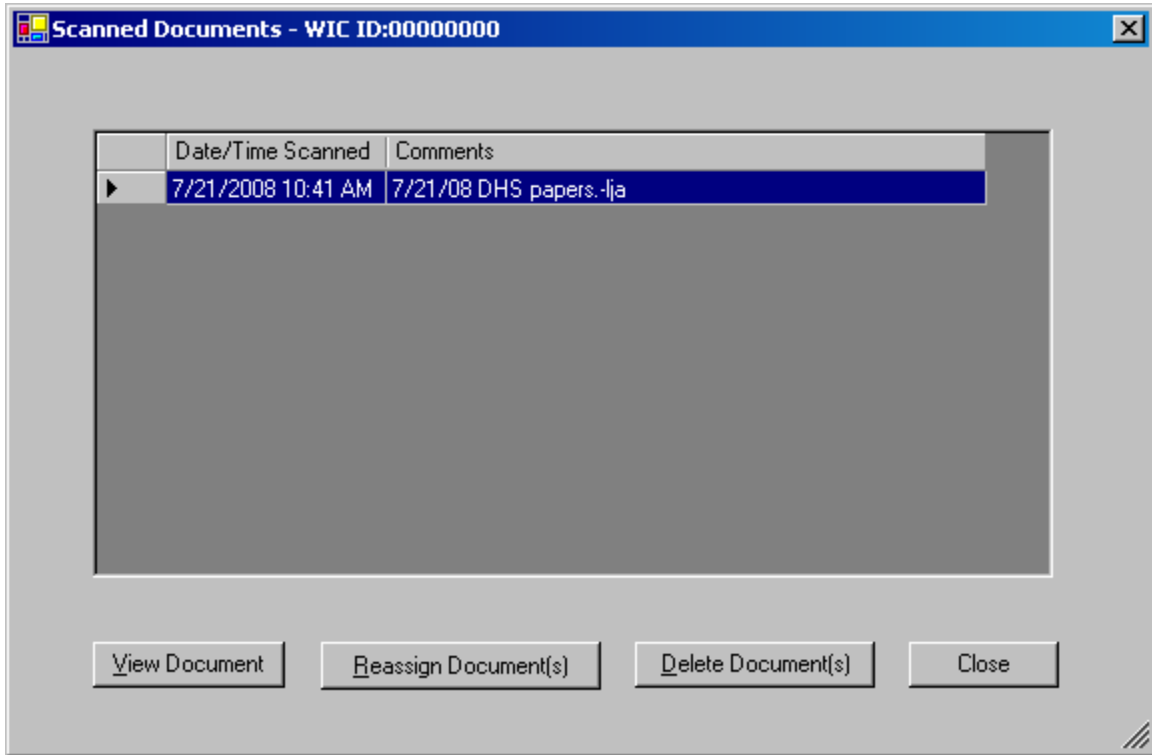


Figure 4 –Scanned Documents Dialog

14.3.1 Controls

This section describes the behavior of the controls on the Scanned Documents dialog.

14.3.1.1 Scanned Documents Grid

This control allows the user to view summary information about each of the scanned documents indexed to the selected participant. It also allows for the selection of one or more of the documents for the purpose of viewing, reassigning, or deleting. The grid is read only. Double clicking a row in the grid will display the View Document dialog. The grid will contain the following columns:

- Date/Time Scanned
- Comments

14.3.1.2 View Document Button

This control allows the user to view a particular document selected in the Scanned Document grid. It will be enabled when the dialog is active and only one document is selected in the grid. It has a mnemonic of 'V'.

14.3.1.3 Reassign Document(s) Button

This control allows the user to select and reassign one or more documents to a different participant or the participant's household. It will be enabled with the dialog is active. It has a mnemonic of 'R'.

14.3.1.4 Delete Document(s) Button

This control allows the user to select and delete one or more of the documents indexed to the current participant or the participant's household. It will be enabled with the dialog is active. It has a mnemonic of 'D'.

14.3.1.5 Close Button

This control allows the user to exit the dialog. Characteristics for the Close button are defined in [Consistencies](#).

14.3.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the dialog.

14.3.2.1 Initializing the Interface

Upon initial display of the dialog, the following occurs:

- The title bar text will be set to "Scanned Documents – [Member.STATEWICID] [Member.FIRSTNAME Member.MIDDLEINITIAL Member.LASTNAME]".
- The Scanned Documents Grid will display all documents for the selected participant from the Member Image table in Date/Time order.
- No document will be initially selected.

14.3.2.2 Edits

There are no updateable controls on this dialog; therefore, there are no edits performed on this dialog.

14.3.2.3 View Document

Upon selection of the View Document button, the selected document is displayed as a PDF in the Adobe Acrobat Reader dialog described in this document. Note that the DocumentImaging.View permission is required, but validated upon entering View Scanned Documents function.

14.3.2.4 Reassign Document(s)

Upon selection of the Reassign Document(s) button, the system will verify if the user has the DocumentImaging.FullControl permission. If the user does not have the necessary permission, the system will display a standard error message with the message text, “You do not have the necessary permissions to Reassign Documents. Please see the supervisor.”)

If the user does have the DocumentImaging.FullControl permission, the system will invoke the Reassign Document(s) dialog described in this document.

14.3.2.5 Delete Document(s)

Upon selection of the Delete Document(s) button, the system will verify if the user has the DocumentImaging.FullControl permission. If the user does not have the necessary permission, the system will display a standard error message with the message text, “You do not have the necessary permissions to Delete Documents. Please see the supervisor.”)

If the user does have the DocumentImaging.FullControl permission, the system will display a confirmation message with the text, “Are you sure you want to delete the selected document(s)?” Options of ‘Yes’ and ‘No’ will be available. If the user selects ‘Yes’, the system will delete the selected document(s) and related comments. If the user selects ‘No’, the system will dismiss the message without deleting and return to the Scanned Documents dialog.

If the SCAN_DOCUMENTS_FOR_HOUSEHOLD business rule is set to “N”, the system will delete the selected document(s) and related comments for the current participant only.

If the SCAN_DOCUMENTS_FOR_HOUSEHOLD business rule is set to “Y”, the system will delete the selected document(s) and related comments for all members of the current participant’s household.

14.3.2.6 Close Button

Upon selection of the Close button, the Scanned Documents dialog is dismissed and the user is returned to the Participant Folder window.

14.4 Adobe Acrobat Reader Dialog

This dialog allows the user to view and the selected document in Adobe Acrobat Reader. The dialog is invoked the user selects the View Document button on the Scanned Documents dialog. The user can print the document as necessary.

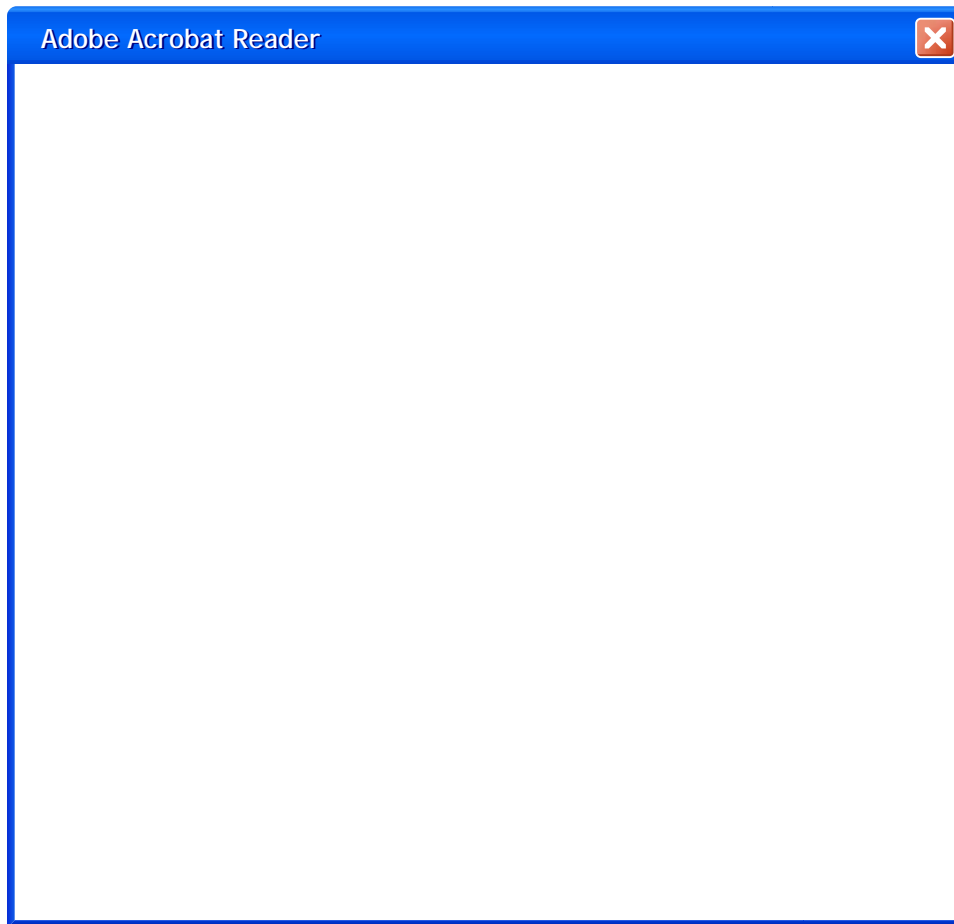


Figure 5 – View Document in Adobe Acrobat Reader Dialog

14.4.1 Controls

Controls for this dialog are orphaned by Adobe Acrobat.

14.5 Reassign Document(s) Dialog

The Reassign Document(s) dialog allows the user to confirm the documents to reassign to a different State WIC ID or Household ID. The dialog is invoked the user selects the Reassign Document(s) button on the Scanned Documents dialog.

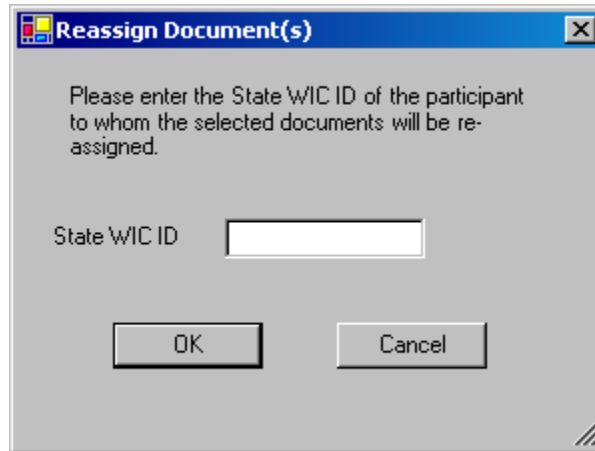


Figure 6 – Reassign Document(s) Dialog (for State WIC ID only)

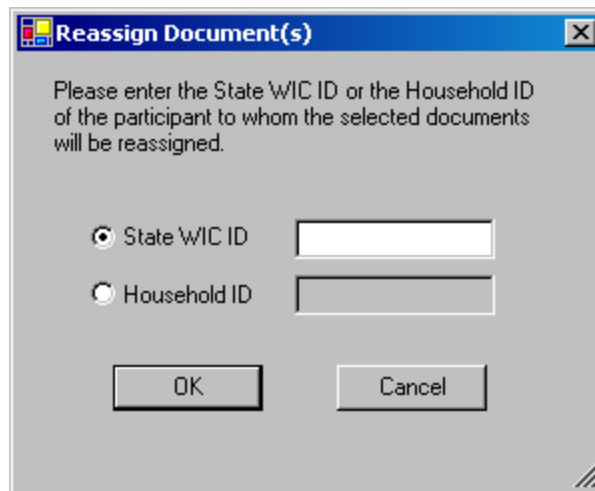


Figure 7 – Reassign Document(s) Dialog (with State WIC ID and Household ID options)

14.5.1 Controls

This section describes the behavior of the controls on the Reassign Document(s) dialog.

14.5.1.1 Reassign Document(s) Text Label

This control instructs the user to enter the State WIC ID or the Household ID of the participant to whom the selected documents will be re-assigned.

If the SCAN_DOCUMENTS_FOR_HOUSEHOLD business rule is set to “N”, the text label will be set to: “Please enter the State WIC ID of the participant to whom the selected documents will be reassigned.”

If the SCAN_DOCUMENTS_FOR_HOUSEHOLD business rule is set to “Y”, the text label will be set to: “Please enter the State WIC ID or the Household ID of the participant to whom the selected documents will be reassigned.”

14.5.1.2 State WIC ID Text Box

This control allows the user to enter the State WIC ID of the participant to whom the selected documents will be reassigned. It will be visible and enabled when the dialog is active and the SCAN_DOCUMENTS_FOR_HOUSEHOLD business rule is set to “N”. Characteristics for the State WIC ID text box are defined in [Consistencies](#).

14.5.1.3 State WIC ID Radio Button and Text Box

This control allows the user to enter the State WIC ID of the participant to whom the selected documents will be reassigned. The radio button will be visible and enabled when the dialog is active and the SCAN_DOCUMENTS_FOR_HOUSEHOLD business rule is set to “Y”. The text box will be visible and enabled when the dialog is active, the SCAN_DOCUMENTS_FOR_HOUSEHOLD business rule is set to “Y”, and the State WIC ID radio button is selected. Characteristics for the State WIC ID text box are defined in [Consistencies](#). When visible, the State WIC ID radio button will be selected as the default.

14.5.1.4 Household ID Radio Button and Text Box

This control allows the user to enter the Household ID of the participant’s household to which the selected documents will be reassigned. It will be visible and enabled when the dialog is active and the SCAN_DOCUMENTS_FOR_HOUSEHOLD business rule is set to “Y”. The text box will be visible and enabled when the dialog is active, the SCAN_DOCUMENTS_FOR_HOUSEHOLD business rule is set to “Y”, and the Household ID radio button is selected. Characteristics for the Household ID text box are defined in [Consistencies](#).

14.5.1.5 OK Button

This control allows the user to reassign the selected documents. Characteristics for the OK button are defined in [Consistencies](#).

14.5.1.6 Cancel Button

This control allows the user to dismiss the dialog without reassigning the selected documents. Characteristics for the Cancel button are defined in [Consistencies](#).

14.5.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Reassign Document(s) dialog.

14.5.2.1 *Initializing the Interface*

Upon initial display of the dialog, the following occurs:

- The title bar text will be set to “Reassign Document(s)”.
- If the SCAN_DOCUMENTS_FOR_HOUSEHOLD business rule is set to “N”, the Reassign Document(s) text label will be set to: “Please enter the State WIC ID of the participant to whom the selected documents will be reassigned.”
- If the SCAN_DOCUMENTS_FOR_HOUSEHOLD business rule is set to “Y”, the Reassign Document(s) text label will be set to: “Please enter the State WIC ID or the Household ID of the participant to whom the selected documents will be reassigned.”
- If the SCAN_DOCUMENTS_FOR_HOUSEHOLD business rule is set to “N”, the State WIC ID text box will be visible and initially blank.
- If the SCAN_DOCUMENTS_FOR_HOUSEHOLD business rule is set to “Y”, the State WIC ID radio button will be visible and initially selected.
- If the SCAN_DOCUMENTS_FOR_HOUSEHOLD business rule is set to “Y”, the State WIC ID text will be visible and initially blank.
- If the SCAN_DOCUMENTS_FOR_HOUSEHOLD business rule is set to “Y”, the Household ID radio button will be visible and initially blank.
- If the SCAN_DOCUMENTS_FOR_HOUSEHOLD business rule is set to “Y”, the Household ID text box will be visible and initially disabled.

14.5.2.2 *Edits*

Upon selection of the OK button, the following edits occur:

- If the SCAN_DOCUMENTS_FOR_HOUSEHOLD business rule is set to “N”, and if the State WIC ID text box is blank, the system will invoke a standard error message with the text, “An entry is required for the State WIC ID.”
- If the SCAN_DOCUMENTS_FOR_HOUSEHOLD business rule is set to “Y”, the State WIC ID radio button is selected, and the State WIC ID text box is blank, the system will invoke a standard error message with the text, “An entry is required for the State WIC ID.”
- If the State WIC ID entered is not valid, the system will invoke a standard error message with the text, “Invalid State WIC ID.”

- If the SCAN_DOCUMENTS_FOR_HOUSEHOLD business rule is set to “Y”, the Household ID radio button is selected, and the Household ID text box is blank, the system will invoke a standard error message with the text, “An entry is required for the Household ID.
- If the Household ID entered is not valid, the system will invoke a standard error message with the text, “Invalid Household ID.”

14.5.2.3 Reassign Document(s)

Upon successful completion of the above listed edits, the system will reassign the selected document(s) to the participant with the State WIC ID that was entered or to all members within the household of the Household ID that was entered. The system will return to the Participant Folder for the record that initiated the action.

14.5.2.4 Cancel Button

Upon selection of the Cancel button, the system will dismiss the Reassign Document(s) dialog and return to the Scanned Documents dialog without reassigning the documents.