

I/EDR 7.0

A new version of On-Site Scanning (OSS) and the Imaging Enterprise Document Repository (I/EDR) called I/EDR 7.0 is scheduled to be deployed on **Friday November 17, 2023**. You will continue to use both OSS and I/EDR the same way that you are using them now. The enhancements to both systems have been outlined below.

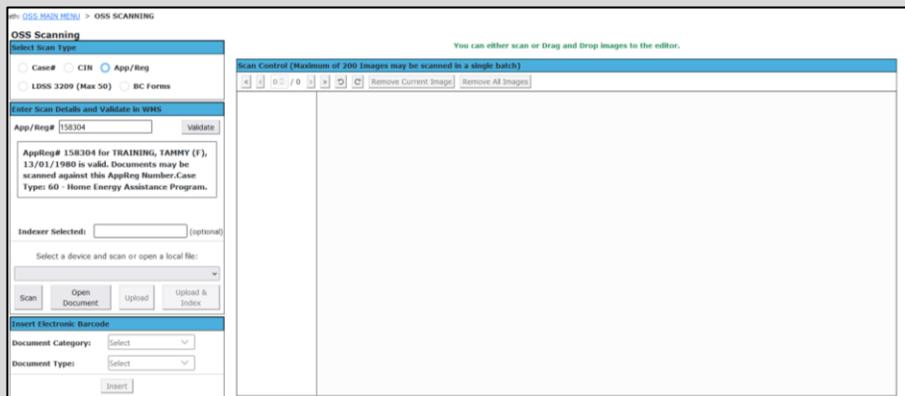
Combined Main Menu

The I/EDR and OSS Main Menus have been combined into one screen. The current links on CentraPort will be replaced with a link titled “IEDR/OSS.”



OSS Scanning: New OSS Scanning Window

OSS users will notice that the OSS Scanning Screen may look different. However, the screen layout and overall functionality remains the same. One significant OSS change is the OSS Scanning Window where scanned images populate.

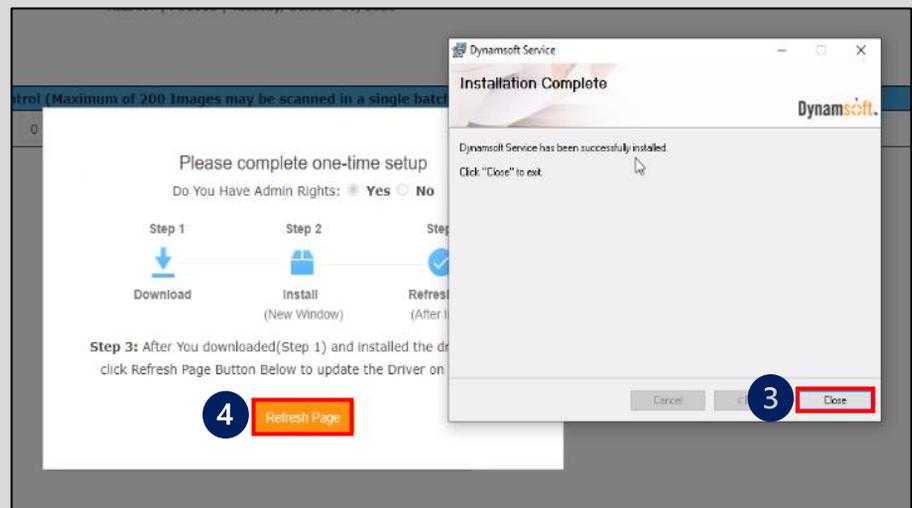
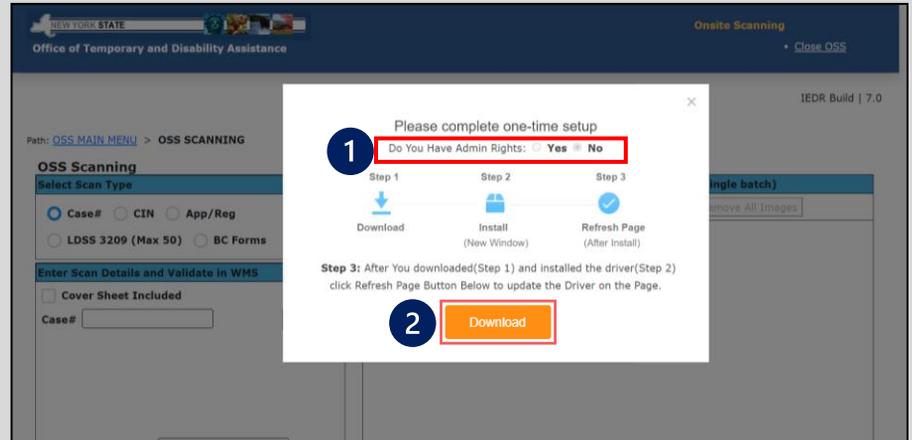


In order to use this new version of the scanning screen, users must download the new viewer software.

OSS Scanning Window: Downloading the OSS Image Viewer

Once IEDR 7.0 is deployed, all OSS Users will receive a prompt to download the new viewer software. The prompt will occur after the OSS user validates a Case, CIN or APP REG for the first time. OSS Users will only need to download the software once. Administrative rights are not required when the user answers “No” to the highlighted question below. *Answering Yes to the admin question is intended for shared workstations. The install will require an administrative role and password.*

- 1 Once prompted, answer either **Yes** or **NO** to “Do You Have Admin Rights” question.
- 2 Click the **Download** button. The software will begin to download in your web browser.
- 3 You will receive a message that the software has been installed. Click the **Close** button.
- 4 Click the **Refresh Page** button.



You are now ready to use the updated viewer in OSS.

The Drag and Drop Feature in OSS

One feature of the updated viewer is the ability to drag and drop files directly into the OSS Scanning Window. Districts that would like to use this feature will need to provision the additional user role of “Drop and Drag” in the I/EDR section of the LDAP screen.

As an example, when a worker receives an email attachment, it can be moved from the worker’s email into the scanning window simply by dragging and dropping the attachment into the OSS Scanning Window. Emails and other documents can also be saved to the user’s desktop as a PDF file then dragged into the Scanning Window.

The image shows an email interface with an attachment 'Employment Verification Demo.pdf' (230 KB) highlighted in a red box. Below the email is the OSS Scanning Window interface. A red arrow points from the text 'Drag and Drop into Scanning Window' to the 'Scan Content' area of the OSS Scanning Window, which contains a preview of the scanned document. The document is an 'EMPLOYMENT VERIFICATION' form from Albany County Department of Social Services, dated 11/02/2022, for training at Acme Corporation Inc. Albany. The form includes a table with columns for 'EMPLOYMENT VERIFICATION', 'DATE', 'EMPLOYEE', 'EMPLOYER', 'EMPLOYEE ID', 'EMPLOYER ID', 'EMPLOYEE TYPE', 'EMPLOYER TYPE', 'EMPLOYEE STATUS', and 'EMPLOYER STATUS'. The table contains data for the month of September 2022.

EMPLOYMENT VERIFICATION	DATE	EMPLOYEE	EMPLOYER	EMPLOYEE ID	EMPLOYER ID	EMPLOYEE TYPE	EMPLOYER TYPE	EMPLOYEE STATUS	EMPLOYER STATUS
September 01	09/01/2022	0000	000	0000	0000	00	00	00	00
September 02	09/02/2022	0000	000	0000	0000	00	00	00	00
September 03	09/03/2022	0000	000	0000	0000	00	00	00	00
September 04	09/04/2022	0000	000	0000	0000	00	00	00	00
September 05	09/05/2022	0000	000	0000	0000	00	00	00	00
September 06	09/06/2022	0000	000	0000	0000	00	00	00	00
September 07	09/07/2022	0000	000	0000	0000	00	00	00	00
September 08	09/08/2022	0000	000	0000	0000	00	00	00	00
September 09	09/09/2022	0000	000	0000	0000	00	00	00	00
September 10	09/10/2022	0000	000	0000	0000	00	00	00	00
September 11	09/11/2022	0000	000	0000	0000	00	00	00	00
September 12	09/12/2022	0000	000	0000	0000	00	00	00	00

BMP, JPG, TIF, PNG and PDF are supported file types in the Drag and Drag Viewer.

Once the attachment populates in the Scanning Window, the user can index the image(s) by adding electronic barcode(s) and uploading the images. Similar to the current version of OSS, the user can also decide to upload the image(s) and index later.

Fields Added To OSS Indexing Screen

For OSS Users that upload images and index at a later time, the additional field of **Upload Type** has been added to the Batch Retrieval Screen. This new field will help sort batches created using drag and drop and batches created by scanning onsite.

Path: [OSS.MAIN.MENU](#) > BATCH RETRIEVAL

OSS Batch Retrieval for Indexing

Enter Search Criteria

Case#: <input type="text"/>	Type: <input type="text" value="Select"/>	Indexer Selected: <input type="text"/>
CIN: <input type="text"/>	User Id: <input type="text"/>	Batch Name: <input type="text"/>
App/Reg#: <input type="text"/>	User Name: <input type="text"/>	Upload Type: <input type="text" value="Select"/>

Date Range:
From: To:

Additionally, the Batch Retrieval Results currently displays 10 unindexed batches per screen. The latest version of OSS Batch Retrieval Results will include a drop down option to allow for 10, 25 or 50 batches to display per screen.

TA	MA	FA	Case	Indexer	Upload Type
			F123456		

Showing 1 to 10 of 12 entries << < 1 2 > >>

Additional OSS Reports Capability

To accompany the drag and drop feature, an additional report titled “**Drag & Drop Event Detail**” has been created:

OSS Reporting

- [District Summary](#)
- [Indexing Event Detail](#)
- [Scanning Event Detail](#)
- [Drag & Drop Event Detail](#)
- [User Detail Summary](#)

This report will identify the details of drag and drop events including: User Name, User ID, the Case/CIN and the date/time.

Path: [OSS.MAIN.MENU](#) > [OSS.REPORTING](#) > DRAG AND DROP EVENT DETAIL

OSS Drag And Drop Event Detail Report

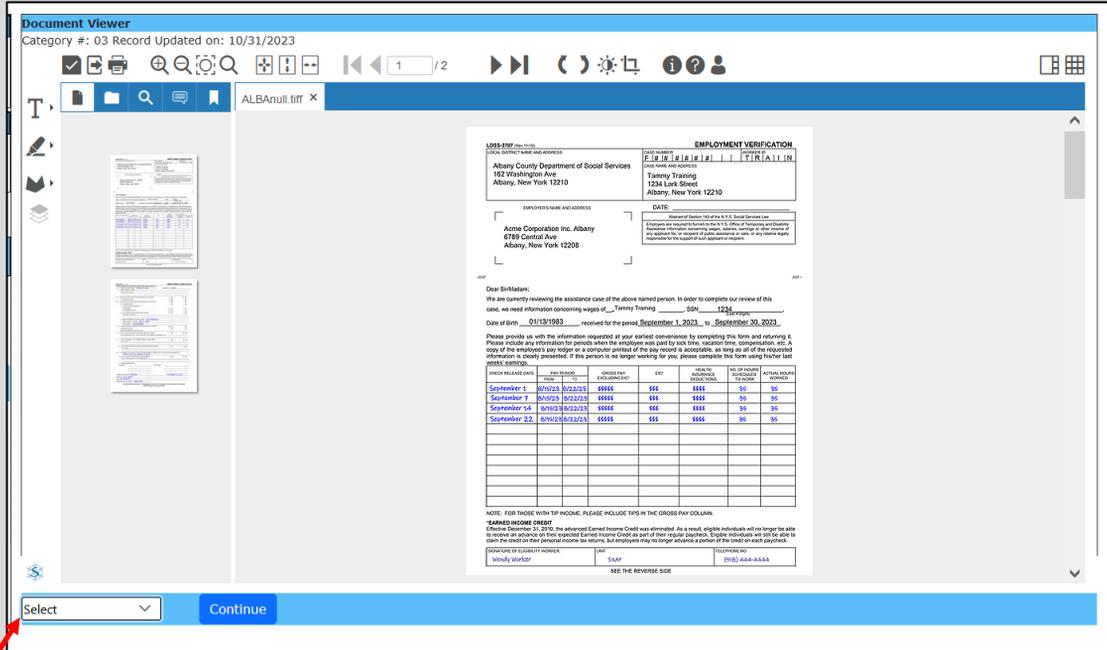
Enter Drag And Drop Event Detail Report Criteria

Begin Date: * <input type="text" value="10/22/2023"/>	End Date: * <input type="text" value="10/31/2023"/>	User Id: <input type="text"/>	User Name: <input type="text"/>
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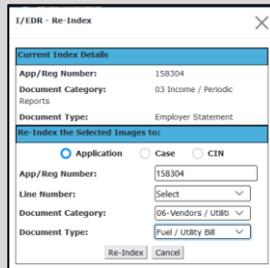
User Name ↑↓	User Id ↑↓	Event type ↑↓	Case/CIN ↑↓	Date/Time ↑↓
utility usr	EDR001	DRAG AND DROPPED BY CASE NUMBER	F173351	10/30/2023 11:59 AM

New I/EDR Image Viewer

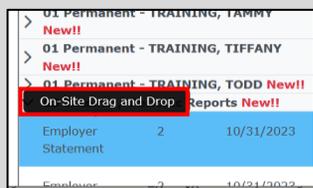
A new image viewer has been added to I/EDR. Compared to the previous image viewer, the functionality of the updated viewer remains the same. Tools exist in the viewer that allows the user to change the display of thumbnails, zoom in, zoom out, magnify the image, page through the category and add annotations.



Users with the appropriate roles can continue to cross reference, reindex and delete images but selecting the drop down under the image viewer. The look of the I/EDR administrative functions has been updated:



Similar to the current version of I/EDR, a user can determine the source of the image by hovering over the category. The source of "On-Site Drag and Drop" has been added:



I/EDR Case Comments

The I/EDR Case Comments screen has a new look. Users will still be able to add comments, annotate comments and delete comments (with appropriate user role). The ability to spell check and modify the font will continue to exist in this version.

In the previous version of I/EDR a “More” link would display when a comments contained more than 500 characters. In I/EDR 7.0, when posting a comment, the entire comment will display, regardless of the number of characters. The “More” link will no longer display.

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Retrieve Comments by

Case Number:

- or -

App/Reg Number:

VIEW
NEW
PRINT
BACK

Case Details	Apply Date Range Filter
<p>Application Number: 158304</p> <p>Application Name: TRAINING, TAMMY, 01/13/1980</p> <p>Case Type: Home Energy Assistance Program</p>	<div style="text-align: right; margin-bottom: 5px;"> Refresh Clear </div> <p>Begin Date (mm/dd/yyyy): <input type="text"/></p> <p>End Date (mm/dd/yyyy): <input type="text"/></p>

11/03/2023 08:46 AM albauser - Alba User Annotate Delete

Pended case for docs. Need Tammy's income.

11/03/2023 08:50 AM albauser - Alba User Delete

Tammy called, left message. Tammy said she uploaded income docs in NYDocSubmit. Will determine eligibility today.