ImageNow Scanning Capture Profile Setup for Historical Salary Adjustment (HSA) documents

1. Log into ImageNow.
2. Select “Settings” then “Options” from the ImageNow toolbar.
4. Select “Manage Profile List...” next to “Capture Profiles”.

![ImageNow Options window]
5. Select “Create...” in the “Capture Profiles” window.

![Capture Profiles dialog box]

6. On the “New Capture Profile” window:
   a. General tab
      i. Name: F GL HSA 001 (change the 001 to the cluster number).
      ii. Source: Scanner.
      iii. Mode: Batch.
      iv. Workflow: F GL HSA Link 001 (change the 001 to the cluster number).

![New Capture Profile dialog box]
b. **Scanner tab**
   i. **Scanning:** PatchCode.

   ![New Capture Profile](image)

$c. **Batch tab**$
   i. **Options:** select Automatic Server Processing.
   ii. **Type:** Patchcode and ensure the “Remove separator sheet” box is checked.

   ![New Capture Profile](image)
d. Index Keys tab (double-click a row item to change it)
   i. Drawer (Type = System Drawer): F Scan 001 (change the ‘001’ to the cluster number for your group).
   ii. Field5 (Type = Batch Sequence): Batch Sequence.

7. Click “Ok” then “Close” then “Ok” again to close out.

*See next page for how to scan HSAs into ImageNow.*
Scanning Historical Salary Adjustment (HSA) documents in ImageNow

1. Documents are scanned at one of the 47 clusters.
2. Make sure all the documents are loaded in the scanner.
3. On the ImageNow toolbar, select the drop-down arrow next to “Capture”, and select the capture profile for the HSA documents to be scanner (example below).

![Capture drop-down menu](image)

4. Navigate to the corresponding F GL HSA linking workflow queue. In this example, cluster 001 navigates to the F GL HSA Link 001 workflow queue.

![Workflow queue](image)

5. Double-click the document to open it.
6. Enter the HSA Number (the number in the HRMS system).

7. Select “Route Forward”.

8. The document will be routed to a queue in which a script will auto process the document. At this point the script will look for the “HSA Number” in HRMS for validity. If the value is valid it will auto-populate the “Created Date” and “Employee ID” fields. Note that it can take up to five minutes or more for the script to find the HSA number in the HRMS system, depending on the system performance.
9. If you are in the “F GL HSA View” group (it is an access profile that allows one to see the HSA drawer), you will be able to search for the document after it is finished being processed by the script. The “Drawer” value and other keys will change, see example below.

10. In the event that the script cannot find the “HSA Number” in HRMS the document will be sent back to the original queue it was sent from with a message (“Invalid HSA Num – please re-enter”) in the “Created Date” field.

11. If the script cannot find the “HSA Number”, then you will need to verify that the number exists in HRMS or contact the University Financial Helpline at 612-624-1617 or finsys@umn.edu for further assistance.

Please Read, Important Information

When viewing an HSA in WebNow, if you receive the error shown below (which can happen for any file type, not just pdf, as indicated in the graphic), you will need to click on the rocket ship to open the document outside of the WebNow browser.