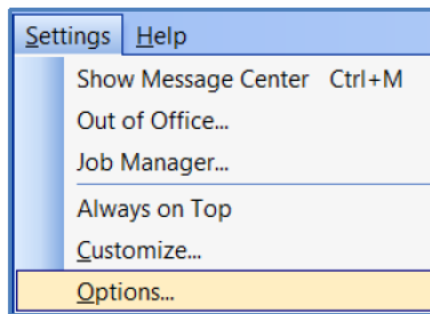


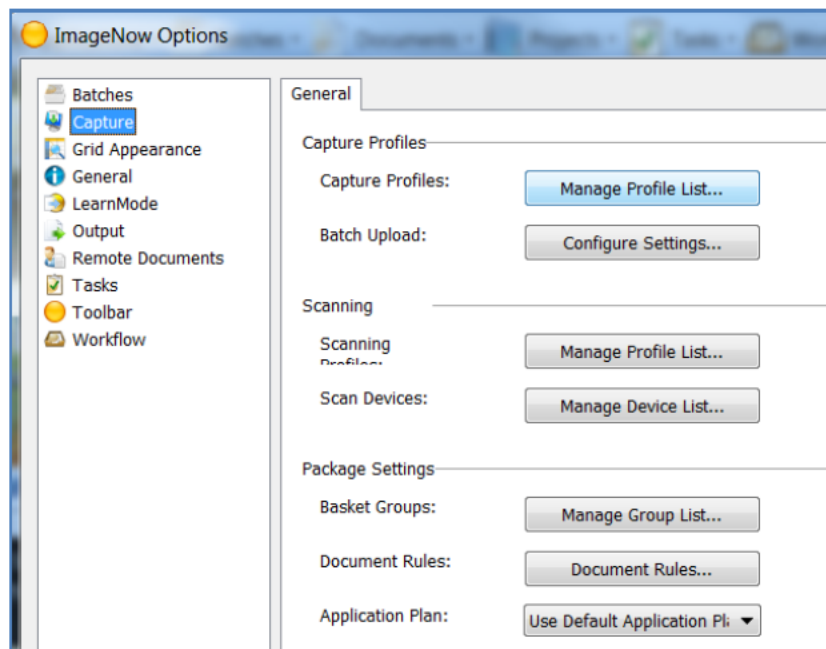


## ImageNow Printer Profile Setup for Historical Salary Adjustment (HSA) documents

1. Log into ImageNow.
2. Select "Settings" then "Options" from the ImageNow toolbar.

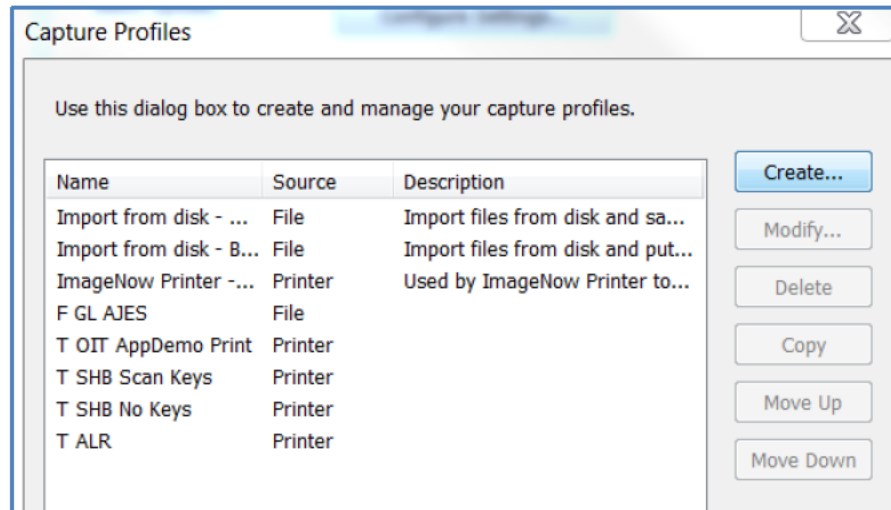


3. Select "Capture" in the "ImageNow Options" window.
4. Select "Manage Profile List..." next to "Capture Profiles".

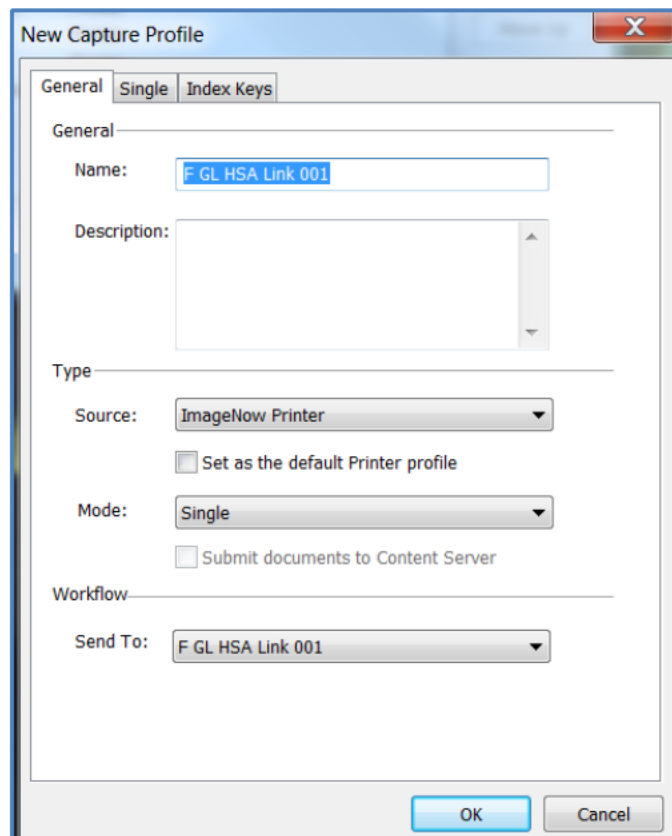




- 5. Select "Create..." in the "Capture Profiles" window.

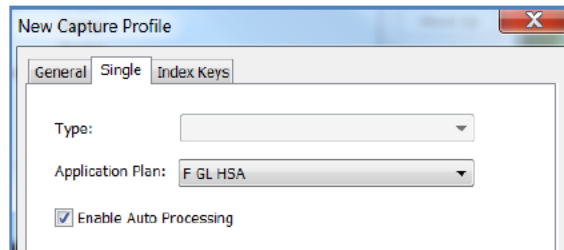


- 6. In the "New Capture Profile" window:
  - a. General tab
    - i. Name: F GL HSA 001 Print (change the '001' to your cluster number).
    - ii. Source: ImageNow Printer.
    - iii. Mode: Single.
    - iv. Workflow: F GL HSA Link 001 (change the '001' to your cluster number).

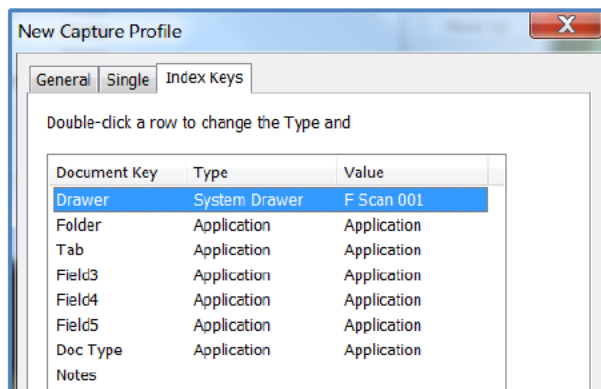


**b. Single tab**

- i. Application Plan: F GL HSA.
- ii. Check "Enable Auto Processing".

**c. Index Keys tab (double-click a row item to change it).**

- i. Drawer (Type = System Drawer): F Scan 001 (change the '001' to your cluster number).



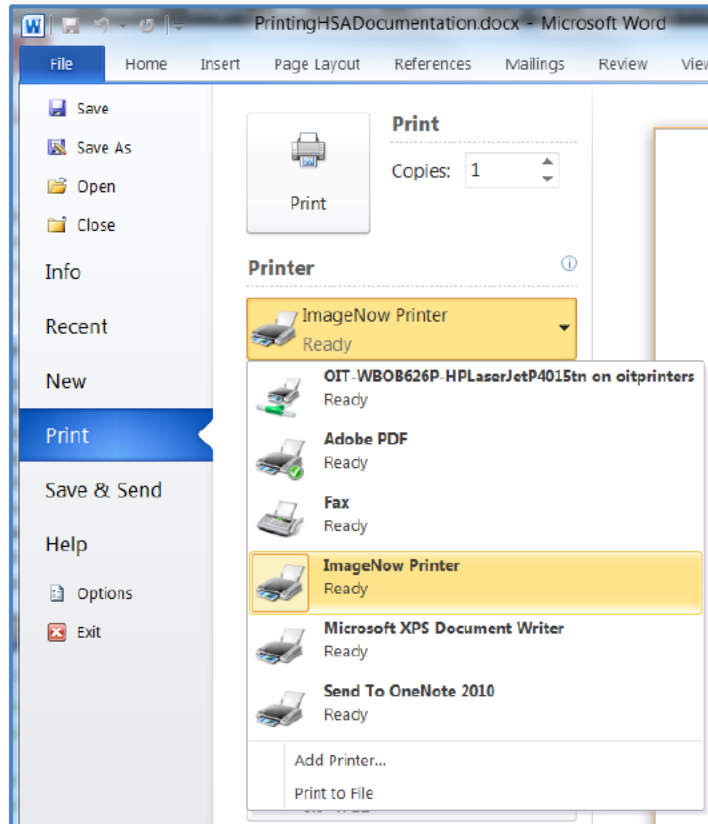
7. Click "Ok" then "Close" then "Ok" again to close out.

*See next page for instructions on how to "print" HSA documents into ImageNow.*

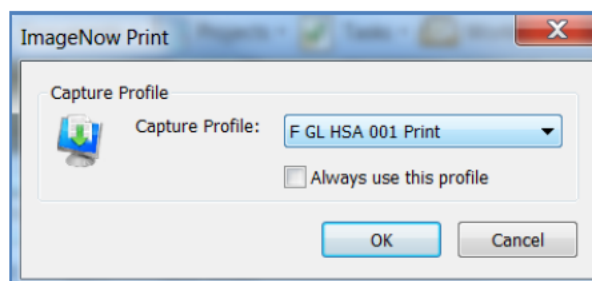


## Printing Historical Salary Adjustment (HSA) documents in ImageNow

1. Remember that you will need the ImageNow desktop client installed to use the ImageNow printer functionality.
2. Open the document that you want to print into ImageNow and then select the usual “File” then “Print” option, just like you would to physically print a document out onto paper. The only difference is that you will select the “ImageNow Printer” as the printer. Example shown below.

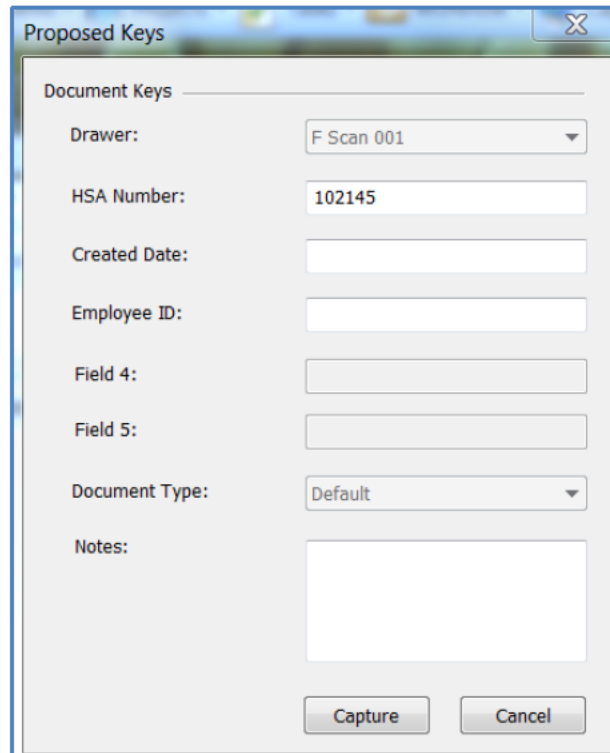


3. When the “ImageNow Print” dialog box is displayed select the “F GL HSA 001 Print” capture profile (the number ‘001’ will be different depending on your cluster number).
4. Click “OK” in the “ImageNow Print” dialog box.





5. Fill in the “HSA Number” (the number in the HRMS system) in the “Proposed Keys” dialog box and then click “Capture.”

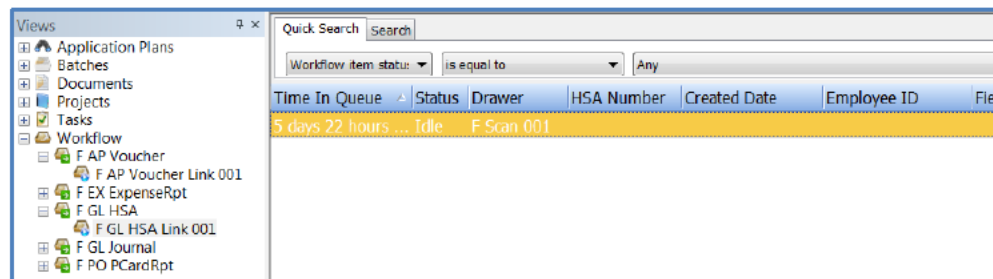


The "Proposed Keys" dialog box contains the following fields:

- Drawer: F Scan 001 (dropdown)
- HSA Number: 102145 (text input)
- Created Date: (empty text input)
- Employee ID: (empty text input)
- Field 4: (empty text input)
- Field 5: (empty text input)
- Document Type: Default (dropdown)
- Notes: (empty text area)

Buttons: Capture, Cancel

6. 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.



Views: Application Plans, Batches, Documents, Projects, Tasks, Workflow

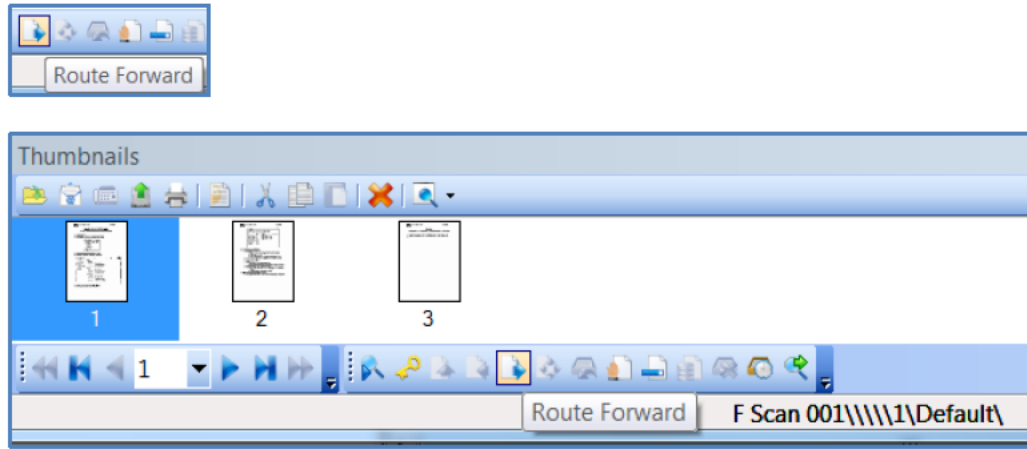
Workflow Queue:

Time In Queue	Status	Drawer	HSA Number	Created Date	Employee ID	Field
5 days 22 hours ...	Idle	F Scan 001				

7. Verify that the HSA Number is correct then double-click the document to open it.



8. Select "Route Forward".



- 9. The document will be routed to a queue in which a script will auto process the document. At this point the script will check 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 system performance.
- 10. 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.

Drawer	Folder	Tab	Field 3	Field 4	File
F GL HSA	1520	2000-10-02	1257792		

- 11. 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.

Time In Queue	Status	Drawer	HSA Number	Created Date	Employee
7 minutes 21 sec...	Title	F Scan 001	HSA6789F	Invalid HSA Num - please re-enter	

- 12. 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.

