Attaching Documentation To PCard Transactions Via OnBase

PCard supporting documentation is electronically “attached” to PCard transactions at the time they are verified or approved in myUFL.

Use Google Chrome for the best functionality.

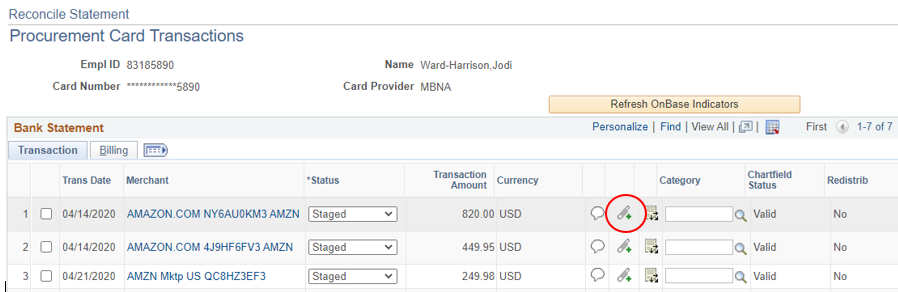
**NAVIGATION**

Use the following navigation to get to the Reconcile Statements page in myUFL

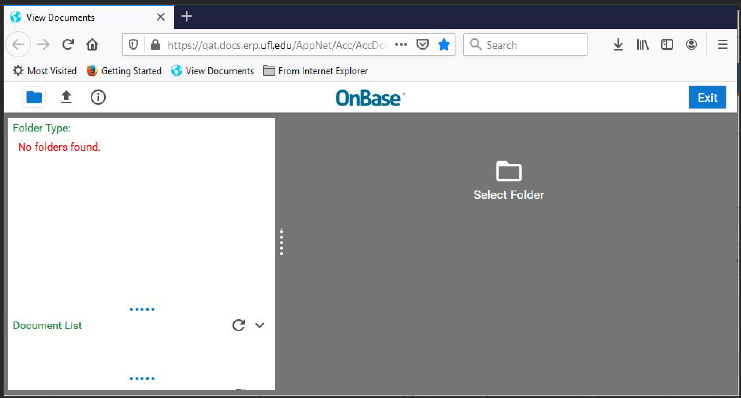
1. Click **Main Menu**
2. Click **Financials**
3. Click **Purchasing**
4. Click **Procurement Cards**
5. Click **Reconcile**
6. Click **Reconcile Statement**

**PROCESS**

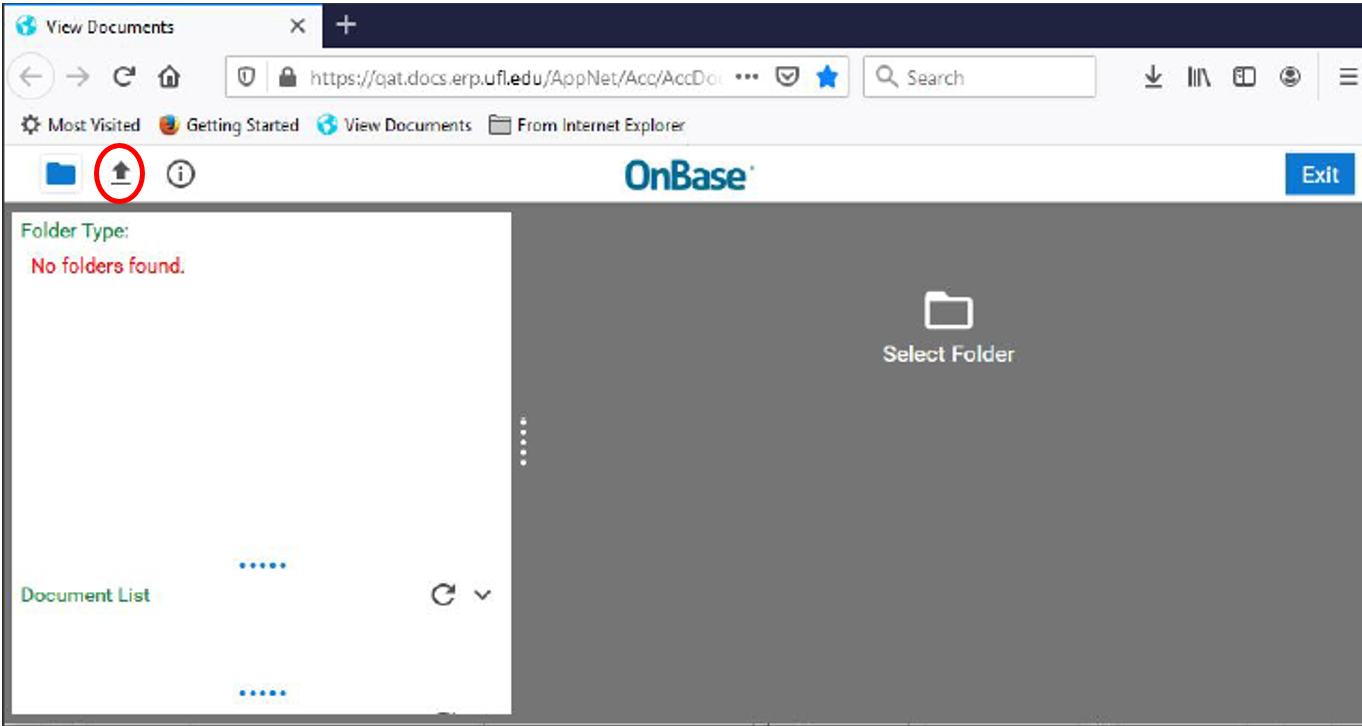
1. **Save** the image of the documentation to be attached to the transaction.
   1. The saved documentation can be things such as a scanned receipt, an email, a web page, or an electronic invoice.
   2. More than one document can be attached to a transaction.
2. Identify the transaction to be verified or approved.
3. Click on the **Paperclip** icon.



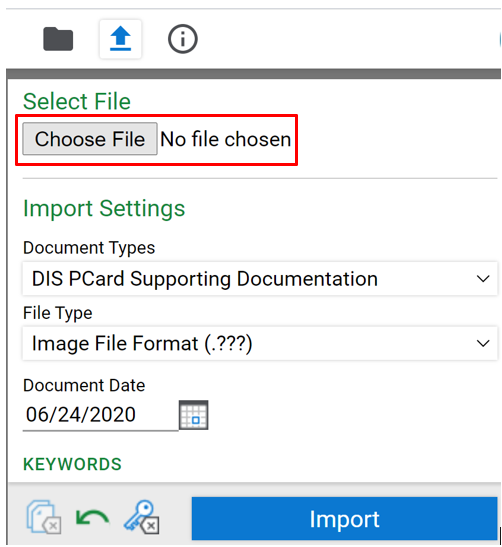
1. You will be redirected to OnBase



1. Click the **Upload File** button.



1. Click the **Choose file** or **Browse** buttondepending upon your Browser



1. Select the **document** to be attached.
2. Click the **Import** button.
3. Click the **Exit** button. Or, to add additional documents click the up arrow again.
4. Click on the **OnBase Refresh Indicator** icon to confirm the document(s) were attached.

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| --- | --- |
|  | When there is NOT a plus sign documents are attached. |
| Green Plus sign indicates there are NO attachments |

1. Complete the reconcile/approve process. See the Reconciling and/or Approving PCard Transactions Instruction Guide.
2. Click the **Save** button.
3. To Delete an attachment, under “Document List” select the document to be deleted, right click and select “Delete”.