

ADD DOCUMENTATION TO EXPENSE REPORTS USING ONBASE

NAVIGATION

Login into myUFL and navigate to:

Nav Bar > Main Menu > My Self Service > Travel and Expense > Expense Reports > View > Report ID: "Enter the ER#"

1. Once on the View Expense Report page, click on **Expense Details**.



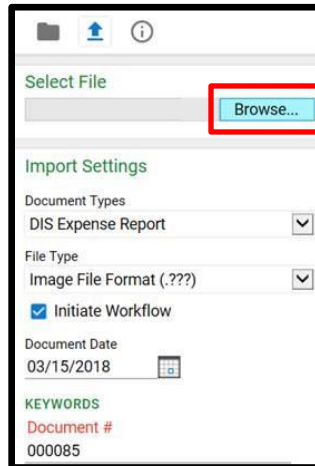
2. Next, click the **Documents** button to open OnBase, which is where you will upload the files.



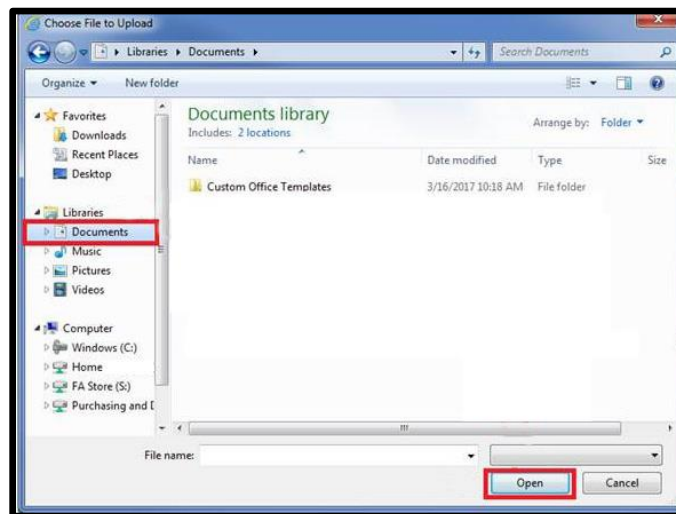
3. Once in OnBase, click on the **Upload** icon.



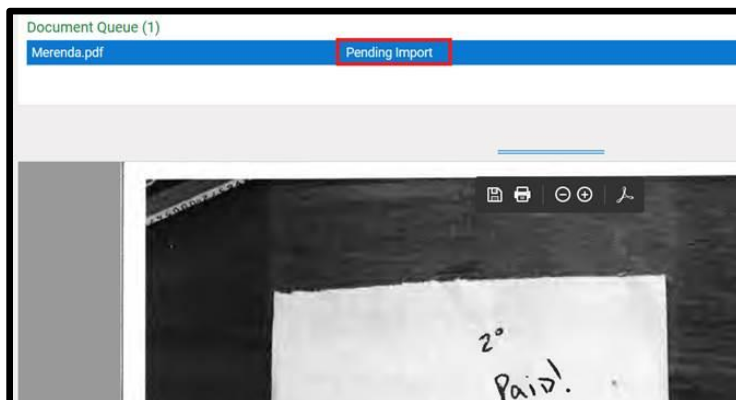
- Next, click the **Browse** button.



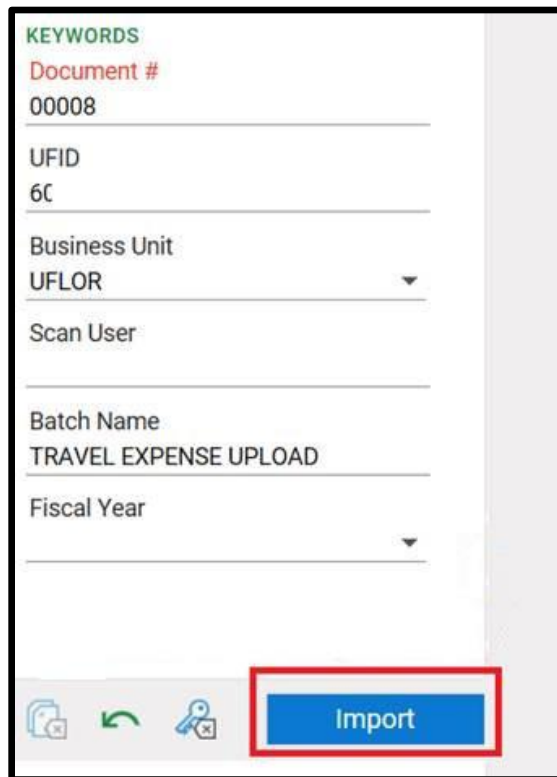
- Navigate to the file you'd like to upload and **Open** the file.



- Once you have chosen the file to upload, you should be able to see a preview of it in the OnBase window. You will be able to see the file selected, and its status will be **Pending Import**. Please see figure below.

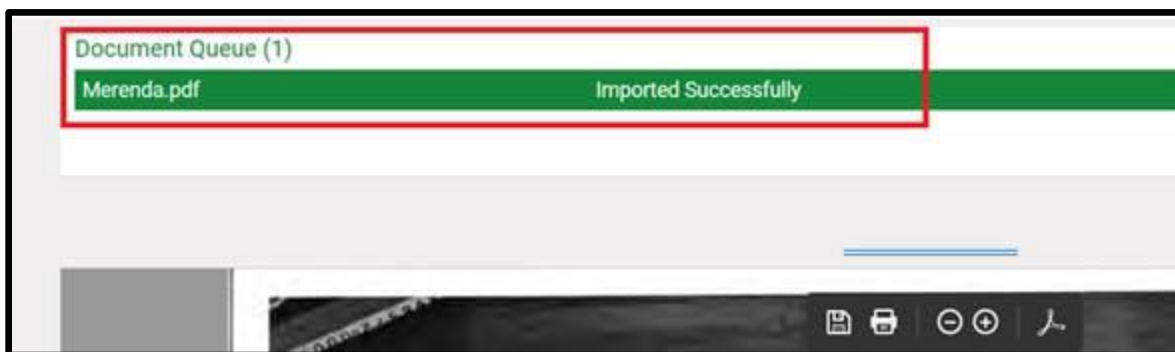


7. Next, import the file by clicking the **Import** button.



A screenshot of a web form titled "KEYWORDS". The form contains several fields: "Document #" with the value "00008", "UFID" with the value "6C", "Business Unit" with a dropdown menu showing "UFLOR", "Scan User" (empty), "Batch Name" with the value "TRAVEL EXPENSE UPLOAD", and "Fiscal Year" with a dropdown menu. At the bottom of the form, there is a blue "Import" button, which is highlighted with a red rectangular box. To the left of the button are three small icons: a document with a plus sign, a circular arrow, and a document with a minus sign.

8. After importing, you should see a message that reads **Imported Successfully**.



9. You have successfully imported your files, and you should be able to see them in your Documents. To verify, click the **Folder** icon and you will be able to see the Document in your **Document List**.

