

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.
 - a. The saved documentation can be things such as a scanned receipt, an email, a web page, or an electronic invoice.
 - b. 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.

Reconcile Statement

Procurement Card Transactions

Empl ID 83185890

Name Ward-Harrison, Jodi

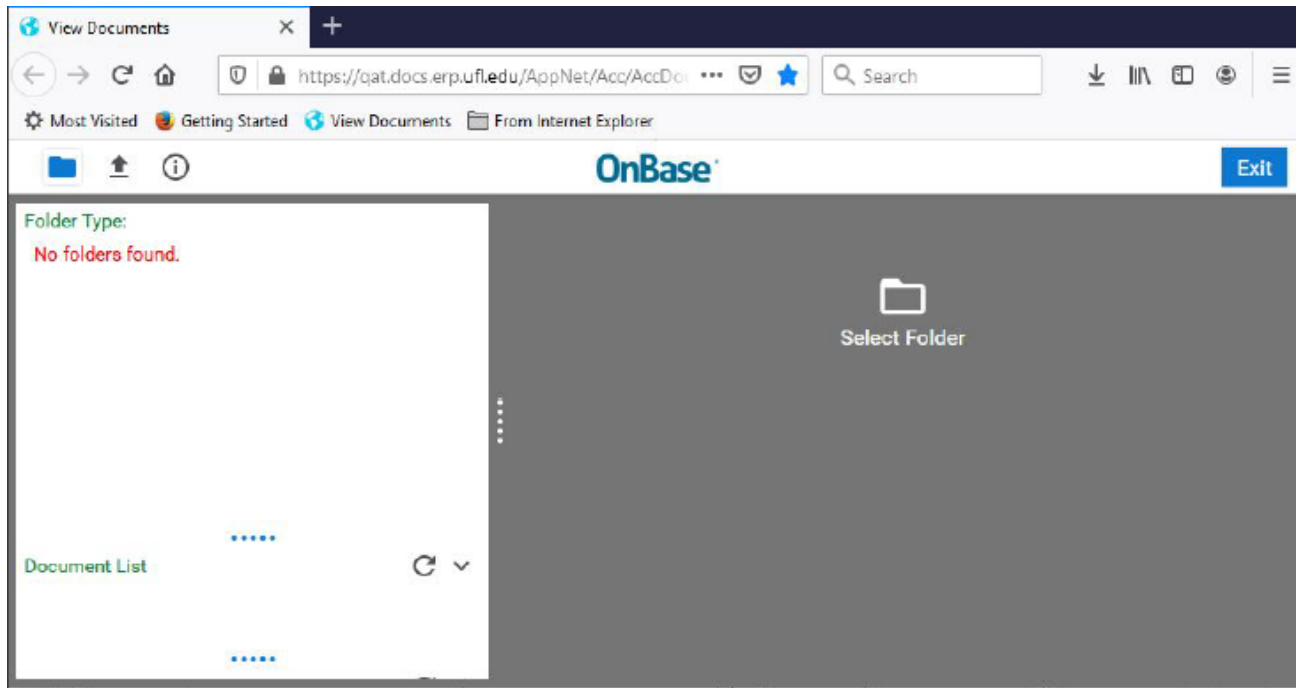
Card Number *****5890

Card Provider MBNA

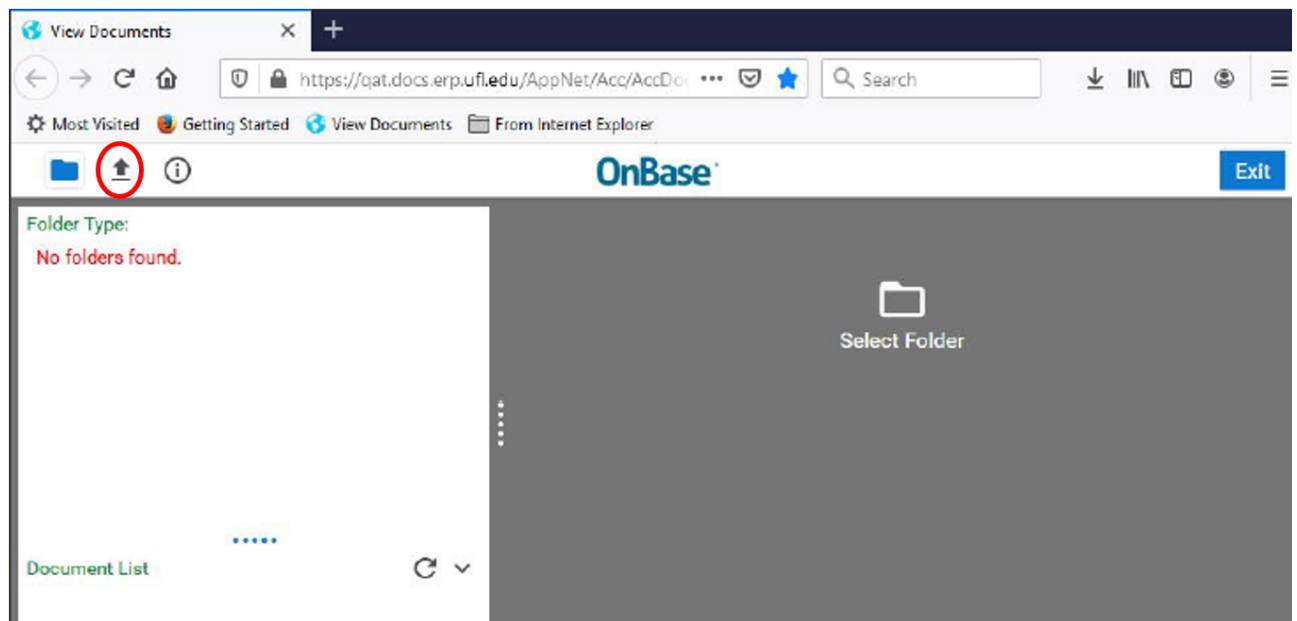
Refresh OnBase Indicators

Bank Statement										
Personalize Find View All First 1-7 of 7										
Transaction	Billing	Trans Date	Merchant	*Status	Transaction Amount	Currency		Category	Chartfield Status	Redistrib
1	<input type="checkbox"/>	04/14/2020	AMAZON.COM NY6AU0KM3 AMZN	Staged	820.00	USD			Valid	No
2	<input type="checkbox"/>	04/14/2020	AMAZON.COM 4J9HF6FV3 AMZN	Staged	449.95	USD			Valid	No
3	<input type="checkbox"/>	04/21/2020	AMZN Mktp US QC8HZ3EF3	Staged	249.98	USD			Valid	No

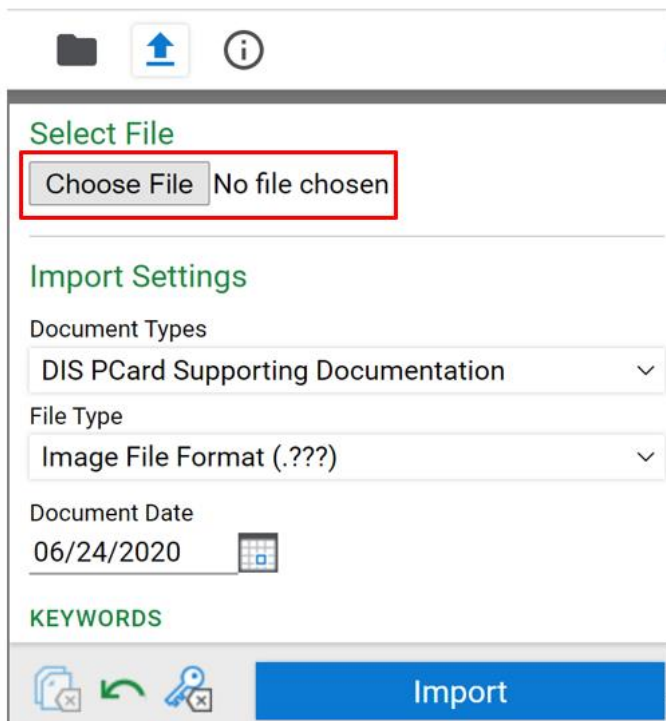
4. You will be redirected to OnBase



5. Click the **Upload File** button.



6. Click the **Choose file** or **Browse** button depending upon your Browser



7. Select the **document** to be attached.
8. Click the **Import** button.
9. Click the **Exit** button. Or, to add additional documents click the up arrow again.
10. Click on the **OnBase Refresh Indicator** icon to confirm the document(s) were attached.



When there is NOT a plus sign documents are attached.

Green Plus sign indicates there are NO attachments

11. Complete the reconcile/approve process. See the Reconciling and/or Approving [PCard Transactions Instruction Guide](#).
12. Click the **Save** button.
13. To Delete an attachment, under "Document List" select the document to be deleted, right click and select "Delete".