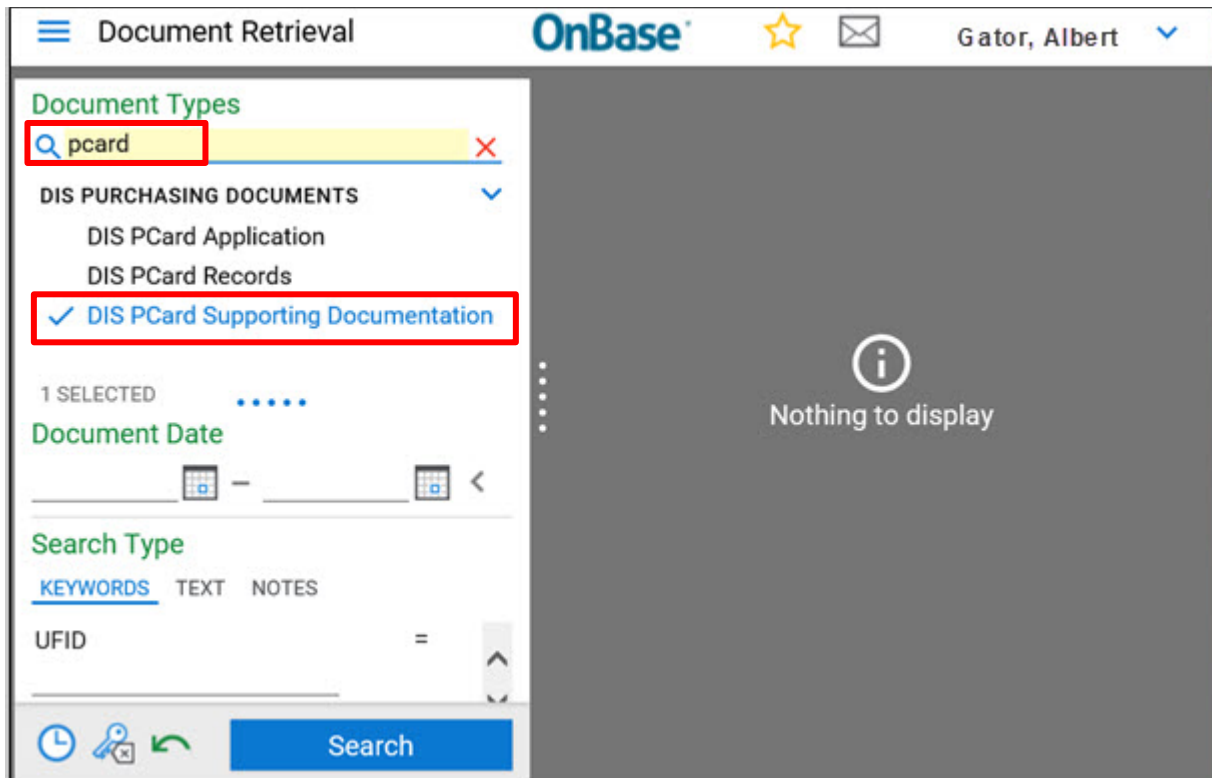


RETRIEVING PCARD DOCUMENTS VIA ONBASE

Supporting documentation which has been “attached” to PCard transactions can be viewed via OnBase.

NAVIGATION

1. Log on to OnBase by typing the following into your browser - <https://docs.erp.ufl.edu>. (You may be asked to verify your Gatorlink credentials.)
2. In the “Document Types” search field, type “PCard” to locate “DIS PCard Supporting Documentation.”



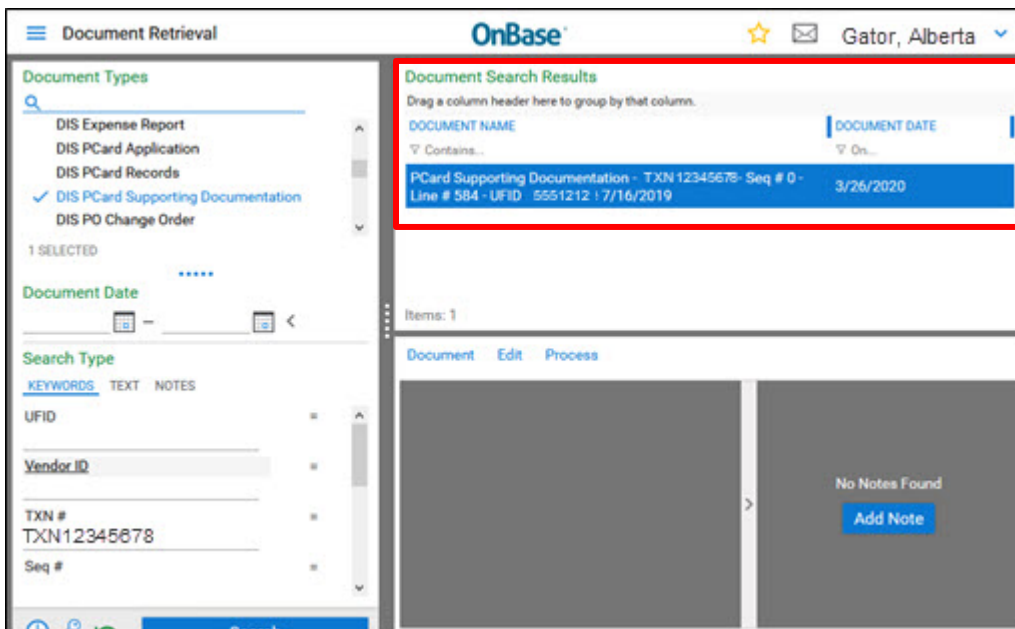
3. Enter a **TXN number** and then click **Search**. To locate TXN number see the Finding TXN Numbers Instruction Guide.

The screenshot shows the OnBase Document Retrieval interface. On the left, there is a sidebar with the following sections:

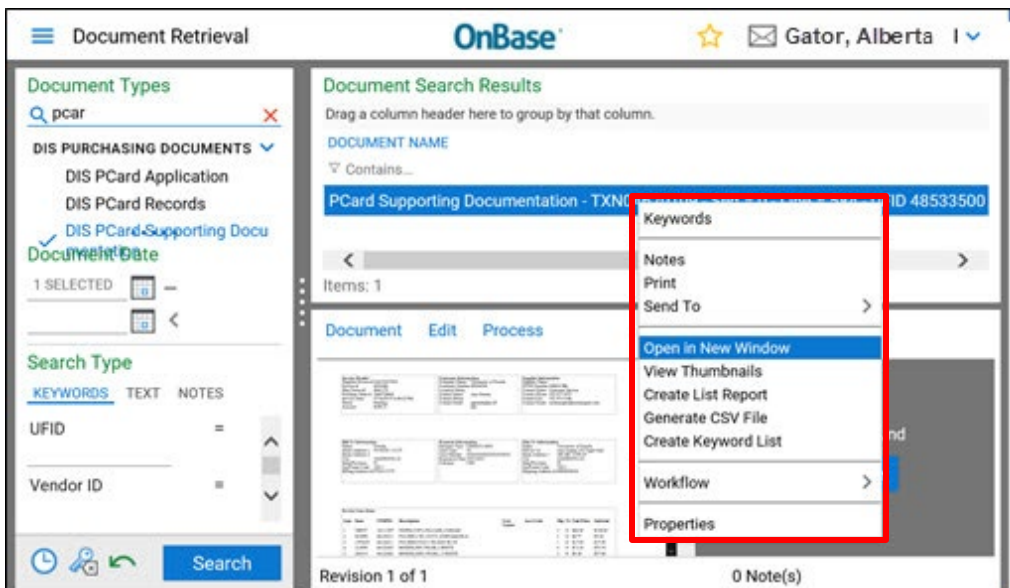
- Document Types:** A list of document types with a search icon and a scroll bar. The items are: DIS Expense Report, DIS PCard Application, DIS PCard Records, **DIS PCard Supporting Documentation** (checked with a blue checkmark), and DIS PO Change Order. Below the list, it says "1 SELECTED".
- Document Date:** A date range selector with two calendar icons and a minus sign between them.
- Search Type:** Three tabs: **KEYWORDS** (selected), TEXT, and NOTES.
- Search Fields:** A list of search criteria with equals signs to their right: UFID, Vendor ID, TXN #, and Seq #. The value "TXN12345678" is entered in the TXN # field and is highlighted with a red box.

At the bottom of the sidebar, there are icons for a clock, a key, and a refresh symbol, followed by a blue **Search** button which is also highlighted with a red box.

4. The documentation will appear in the **Document Search** panel.



5. If the document does not open automatically, right click over the document for action options.



FOR ADDITIONAL ASSISTANCE

Technical Issues

The UF Computing Help Desk
352-392-HELP
helpdesk.ufl.edu

Policies and Directives

Procurement Services: Pcard Services
352-392-1331
pcard@ufl.edu
procurement.ufl.edu/uf-departments/procurement-cards-pcard