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.

		View Exp	oense Report			☆	Q	0	
	1	lew Window Help	p Personalize Page						
							Ex	pense D	etails
				Actions	Choose an Action		、 、	GC	
Report	000085	Paid							
Created	03/06/2018	Kristina							

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

View Expense Report						
Narendra						
Business Purpose Report Description Reference	Generic Employee Reimbursement Reimbursement PRE for Loupes	Report000085PaidDefault LocationGainesville FLImage: Attachments (1)				
*Benefit to the State/Grant	Improve patient care	Documents				

- 3. Once in OnBase, click on the **Upload** icon.
- 4. Next, click the Choose File button.





Select File Choose File No file chosen	
Import Settings	
Document Types	
DIS Travel Authorization	~
File Type	
Image File Format (.???)	~
Document Date 04/28/2021	
KEYWORDS	
Document #	
0000459871	

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

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Organize 👻 New folder						× 🛄	
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> Creative Cloud F	5XXXXX-Non-Operating-Revenues (1).pdf	4/26/2021 2:29 PM	Adobe Acrobat D	154 K	B		
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Final Paylist	7XXXXX-Operating-Expenses-Non-Payrol	4/16/2021 12:02 PM	Adobe Acrobat D	238 K	В		
Hue Visio	7XXXXX-Operating-Expenses-Non-Payrol	4/20/2021 8:25 AM	Adobe Acrobat D	238 k	В		
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					Open	Cancel	

6. 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.





Travel and Expense

KEYWORDS	
Document #	
80000	
UFID	
60	
Business Unit	
UFLOR	•
Scan User	
Batch Name	_
TRAVEL EXPENSE UPLOAD	
Fiscal Year	
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8. After importing, you should see a message that reads Imported Successfully.

Merenda.pdf	li	mported Successful	ly	

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**.

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