

ADD DOCUMENTATION TO EXPENSE REPORTS USING ONBASE

NAVIGATION

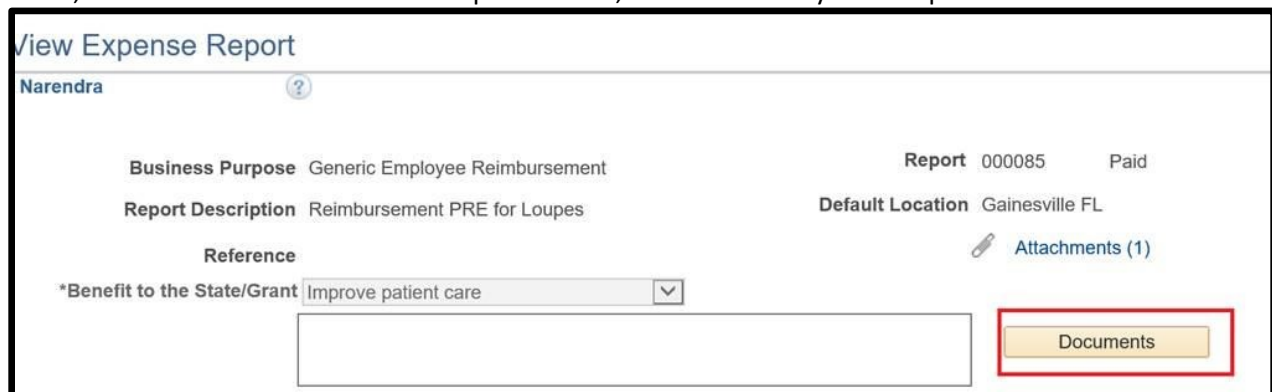
Login into myUFL and navigate to:

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.
4. Next, click the **Choose File** button.



Select File

Choose File No file chosen

Import Settings

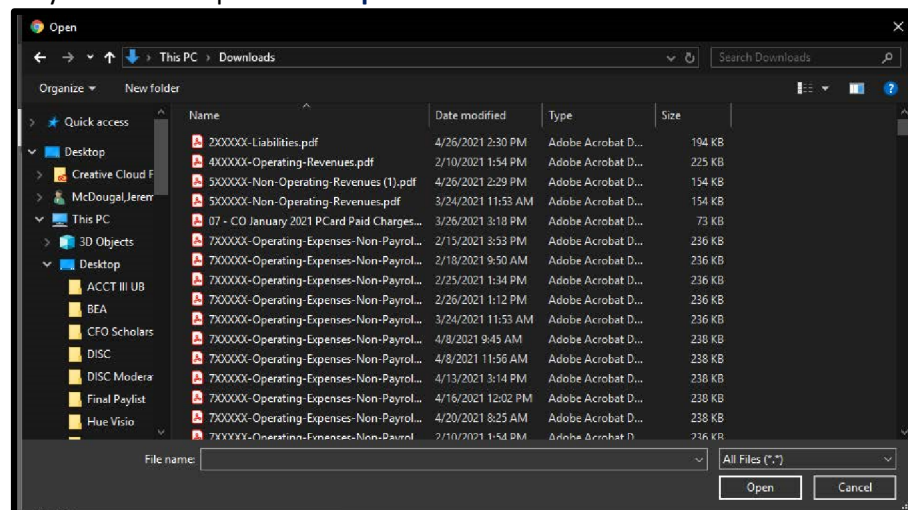
Document Types
DIS Travel Authorization

File Type
Image File Format (.???)

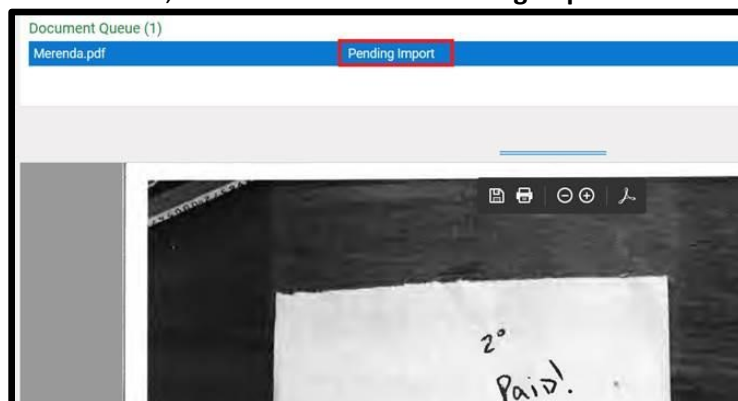
Document Date
04/28/2021

KEYWORDS
Document #
0000459871

- 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.



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

KEYWORDS

Document #
00008

UFID
6C

Business Unit
UFLOR

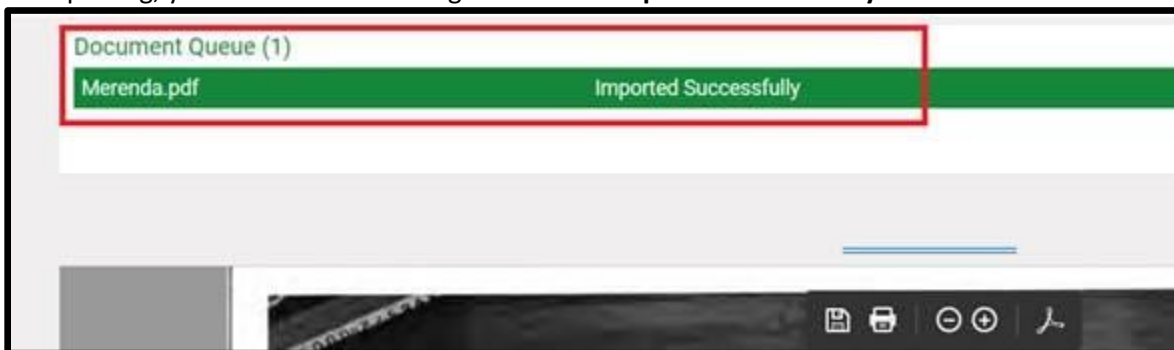
Scan User

Batch Name
TRAVEL EXPENSE UPLOAD

Fiscal Year

Import

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**.

