

Quick Start Guide: Document Retrieval

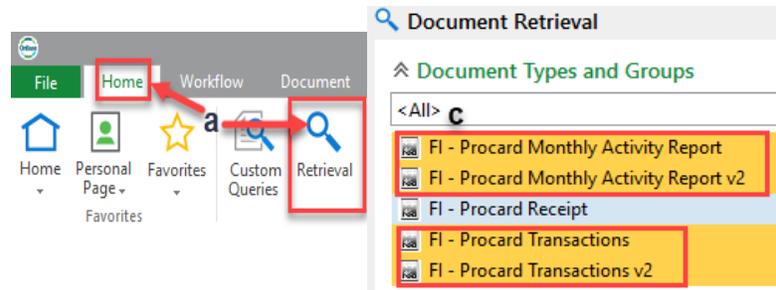
1. Login to OnBase

- a. Login using this address:
<https://onbase.louisville.edu/onbase>
(do not use Edge browser)
- b. Login to OnBase using your University UserID and password.



2. Go to Document Retrieval:

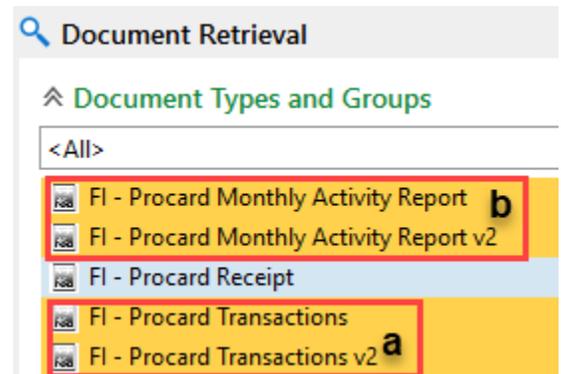
- a. Go to Home and Click on Retrieval.
- b. The complete list of retrievable items will be in the drop down window under Document Types and Groups grouped together by FI – Procard.
- c. The most common items to search for will be FI - Procard Transactions and FI – Procard Monthly Activity Report.



3. Select document type to retrieve:

Select document type by clicking on the name of the document needing to be reviewed.

- a. For procard transactions, select both the FI – Procard Transactions and FI – Procard Transactions v2 by holding down the Control button (Ctrl) on the keyboard and clicking each one individually.
- b. To review the approvals and comments made on the Monthly Activity Report (MAR) select FI – Procard Monthly Activity Report and FI – Procard Monthly Activity Report v2 by holding down the Control button (Ctrl) on the keyboard and clicking each one individually.



4. Retrieving Data for Procard Transactions:

- a. Searching can be done by department ID, card number (last 4 and last 6), cardholder name, amount, transaction date, merchant, transaction number, cardholder employee ID, cardholder user ID, default or reallocated to speedtype, default or reallocated to account code, policy violation, VP Dean Code, month end date etc....

a

| | |
|-----------------------------------|----------------------|
| PROCARD - Department ID | <input type="text"/> |
| PROCARD - Transaction Card | <input type="text"/> |
| PROCARD - Transaction Card Holder | <input type="text"/> |

- b. Enter information available about the transaction. The asterisk (Shift + number 8) is a wildcard in OnBase. Entering the asterisk will return more results in OnBase.
- c. After search criteria is entered click Find.
- d. Results will be returned matching the search criteria in the window to the right of the document search area.

PROCARD - Transaction Merchant

PROCARD - Transaction Number

PROCARD - Transaction EMPLID

d Search Results: 86 Document(s)

| Icon | Name |
|------|---|
| | CARD 620 - 241374693471004730 - 12/12/2019 - OFFICE DEPOT #1170 \$12.44 |

5. Retrieving Data for Monthly Activity Reports:

- a. Searching can be done by card number (last 4 and last 6), cardholder name, cardholder user ID, period end, PS billing date (always the 26th of the cycle month), department ID, approved by, certified by, VP Dean Code, MAR delinquent, etc....
- b. For information on how to search in OnBase please see 4b, 4c and 4d above.

6. Additional Retrieval Options:

Any of the following documents can be retrieved in OnBase: additional items, card sign-out logs, event attendees, and receipts.

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PROCARD - Transaction Card

PROCARD - Transaction Card Holder

PROCARD - Transaction UserID

PROCARD - Period End

PROCARD - PS Billing Date

PROCARD - Department ID