1. Login to OnBase
   a. Login using this address: 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.
   • For procard transactions select FI – Procard Transactions
   • To review the approvals and comments made on the Monthly Activity Report select FI – Procard Monthly Activity Report
   • Enter information available about the transaction. Asterisk (done by holding the shift key down and pressing 8) is the wild card in OnBase

4. Retrieving Data for Procard Transactions: Enter information available about the transaction
   • Asterisk (done by holding the shift key down and pressing 8) is the wild card in OnBase

For example, if you know the last name of the cardholder and the merchant name enter both criteria with an asterisk before and after the last name and before and after the merchant name. Only results with the criteria entered will appear in the window on the right hand side.
5. Retrieving Data for Monthly Activity Reports:
Enter information available about the Monthly Activity Report.
- Asterisk (done by holding the shift key down and pressing 8) is the wild card in OnBase

For example if you know the last name of the cardholder and the cardholder has multiple cards you can enter an asterisk before and after the cardholder last name and before and after the last 4 digits of the card number. Only results with the criteria entered will appear in the window on the right hand side.

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