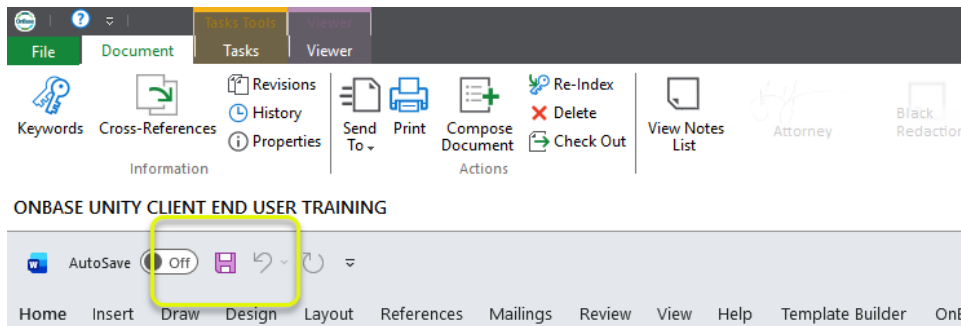


Editing Documents

How to Edit an Existing Document

This method will only work for Microsoft Word, Excel, & PowerPoint files. If you need to make changes to a different file format, please use the checkout/in method in the next section.

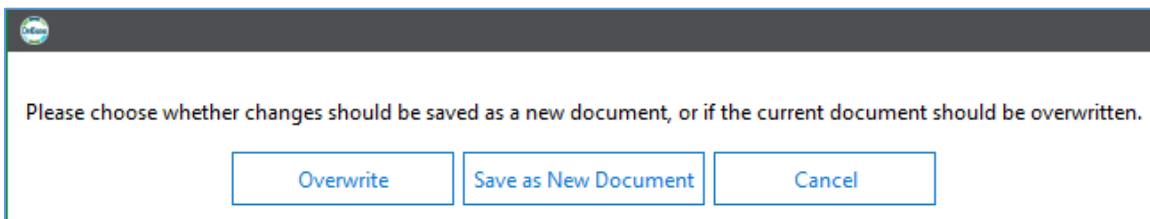
- Open the document from OnBase. Word, Excel, and PowerPoint files will open in an embedded viewer. Make your changes and click the Save icon (top left).



- Each save creates a new revision, allowing you to track changes over time.
- To view previous revisions, click the revisions number (top right). You can open any revision to see how the document looked at that date/time.

| Version # | Revision # | File Type | Date | Comments |
|-----------|------------|----------------------|-------------------|----------|
| | 3 | MS Excel Spreadsheet | 2/26/2018 8:32 AM | |
| | 2 | MS Excel Spreadsheet | 2/26/2018 8:31 AM | |
| | 1 | MS Excel Spreadsheet | 2/26/2018 8:28 AM | |

If a document type does not utilize revisions, you will be prompted to overwrite the existing document or save as a new document. Just select Overwrite to save your changes.



How to Use Check Out/In

Use this method when editing Publisher, Project, Visio, Adobe Acrobat, text files, or to work on Word/Excel/PowerPoint documents offline for an extended period.

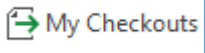
1. Check Out the Document:
 - a. Right-click the file in the search results and select Check Out.

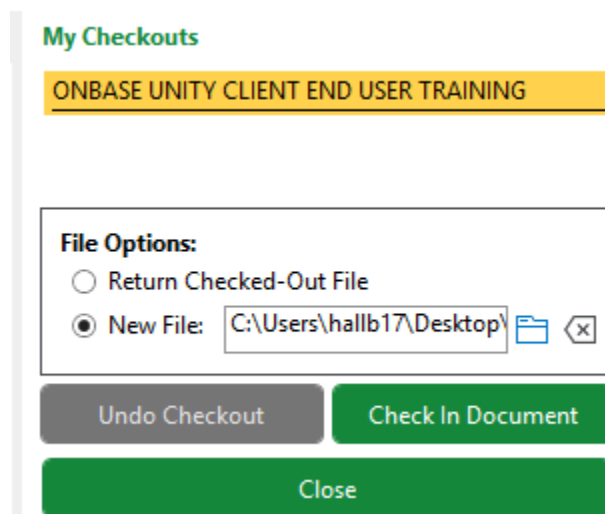
b. A confirmation message appears at the bottom of the screen.

2. Save a Local Copy:

- a. Right-click the document again and choose Send To > File.
- b. Select a directory (default is Desktop) and click Save.
- c. Open and edit the document locally.

3. Check In the Document:


- a. On the Home tab, click My Checkouts. 
- b. Select the document from the right-hand panel and choose New File.
- c. Browse to your edited file and click OK. This will put your updated document into OnBase as a new revision.



How to Save a Document That Only I Can View

If there is a specific document that only you should be able to access, you can use the ‘BGKY – Confidential’ document type.

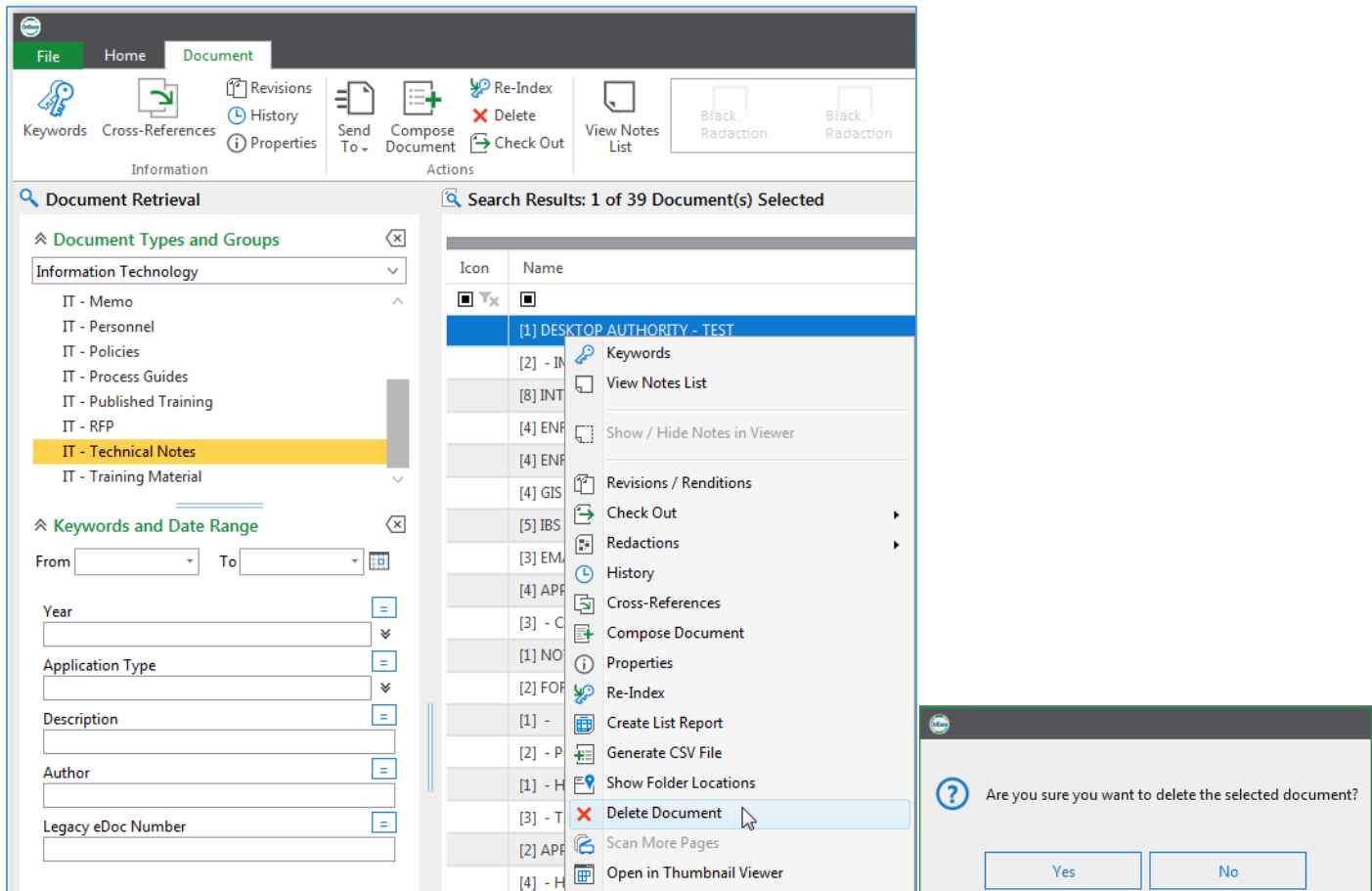
When you save a document using to the “BGKY – Confidential” document type, you will need to do the following:

- Type your clock-in number in the Employee Number field and press Tab. Other fields will auto-populate. Always confirm the employee number is correct before importing. The User Security ID shown is the only account that can access this document.
- If you enter the wrong number, click the **Clear** icon  to reset all fields, then enter the correct employee number.

Note: Only use this document type when necessary. Generally, most documents should be shared with the division and do not need to be confidential. If a document is strictly for personal use, it should not be put in the OnBase system.

How to Delete Document(s)

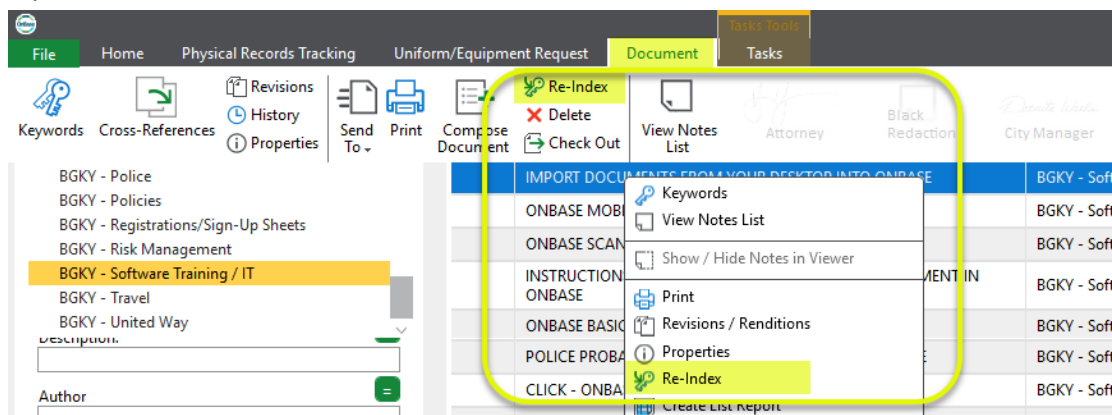
Right-click the document in the search result list and click Delete Document. If you are on the Document tab you can highlight the document and select the Delete icon at the top of your screen. Click Yes when prompted if you're sure you want to delete the selected document. If you want to select multiple documents use the Shift key on your keyboard to select a range of documents or the Ctrl key to select specific documents and then Delete. Please be careful when deleting documents as there may be other users in your division that are still using the document.



How to Re-Index

Use Re-Index to change a document's type or update its keywords.

- Methods:
 - Option 1: Right-click the document in search results and select Re-Index.
 - Option 2: On the Document tab, select the document and click the Re-Index icon.



- **Re-Index Panel:**
 - Appears on the right-hand side.
 - Change the Document Type and update any keywords. Changing the document type may alter available keywords.
- **Save:** Click Re-Index at the bottom of the panel to apply changes.

Re-Index

Document Type Group
Information Technology

Document Type
IT - Technical Notes

File Types
MS Word Document

Document Date
03/01/2018

Keywords

Year

Application Type
GIS

Description
TEST WORD

Author

Legacy eDoc Number

Re-Index

Close

How to use Mass Re-Index Tool

If you need to re-index multiple documents at one time, there is a custom mass re-index tool. This process updates multiple documents at once. There is no undo. Do not re-index other users' documents. Contact Helpdesk if you are unsure.

Steps:

1. **Search & Select:** Find documents with the same target type and keywords. Select all documents to re-index.

File
Home
Physical Records Tracking
Document
Tasks Tools
Tasks

Execute Task
System Tasks

Document Retrieval

Document Types and Groups
Conversion
CON - Information Technology

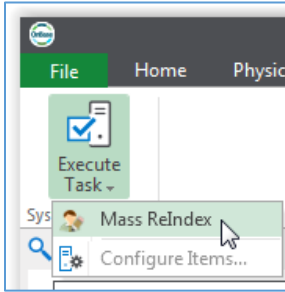
Keywords and Date Range
From To
Legacy eDoc Number

Search Results: 5 of 5 Document(s) Selected

| Icon | Name |
|-------------------------------------|---|
| <input checked="" type="checkbox"/> | [1] WEEKD17 - TIMECLOCK 7 PAYROLL CLERK TRAINING |
| <input checked="" type="checkbox"/> | [1] WEEKD17 - TIMECLOCK MANAGER 7.0 TRAINING - MI |
| <input checked="" type="checkbox"/> | [1] WEEKD17 - TIMECLOCK SUPERVISOR TRAINING GUIDE |
| <input checked="" type="checkbox"/> | [1] WEEKD17 - PARKS TIMECLOCK TRAINING SESSIONS - |
| <input checked="" type="checkbox"/> | [1] WEEKD17 - TIMECLOCK PLUS SERIAL NUMBERS - TEC |

2. Start Mass Re-Index:

- a. Click Tasks → Execute Tasks → Mass ReIndex.



3. Configure Re-Index:

- a. Select Target Document Type Group and Target Document Type.
- b. Keywords for that type appear in the bottom grid.

4. Override Options (optional):

- a. Document Date: Check Override Document Date to set a new date.
- b. Keywords: Select a keyword → check Override → enter/select new value → click Override.
Repeat for other keywords as needed. Unchanged keywords retain original values.

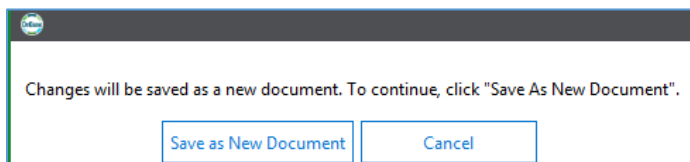
5. Apply Changes: Click Re-Index at the bottom to update all selected documents.

A screenshot of the 'Mass Re-Index' dialog box. It contains several fields: 'Target Document Type Group' (dropdown), 'Target Document Type' (dropdown), 'Document Date' (date field with '10/30/2025' and an 'Override Document Date' checkbox), and 'Override Target Values' section with 'Target Keyword' (dropdown) and an 'Override' checkbox. At the bottom, there is a table with two columns: 'Target Keyword' and 'Override Value'. The table is currently empty. At the very bottom, there is a 'Note: Selected source documents must be of same document type.' and two buttons: 'Re-Index' and 'Cancel'.

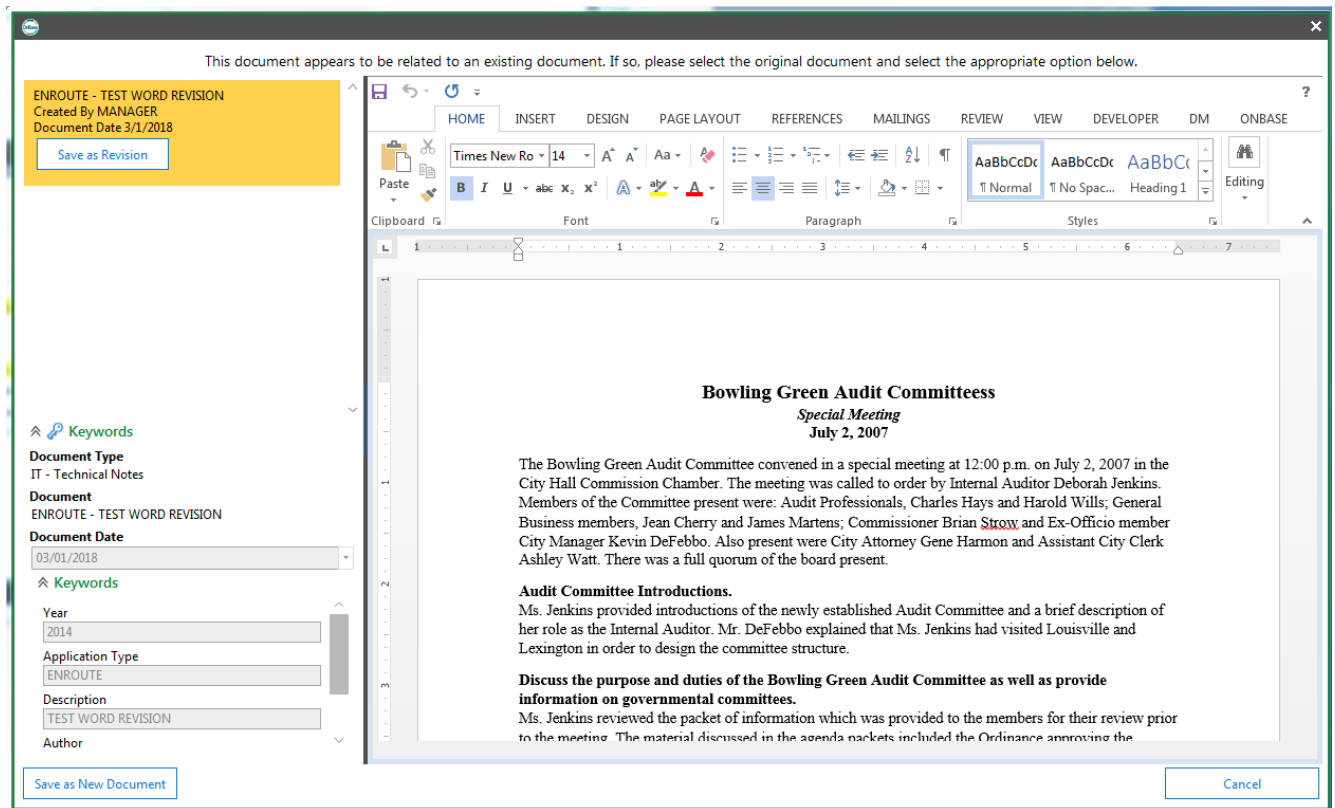
How to Revert to a Previous Revision

Document revisions cannot be deleted. They are stored as snapshots of the document at different points in time. If a major mistake is made in a document and you need to revert to a previously saved version, you can follow the steps below:

1. Open the revision that you want to use.
2. Click **Save** -> **Save as New Document**. The import menu will appear.



3. **Do not change any keywords** and click **Import**. Since the keywords will match exactly you will get a screen letting you know this document appears to be related to an existing document.
4. Click on the document listed in the top left. It will display the document in the preview window.
5. Click the **Save as Revision** button and OnBase will save this as the newest revision of the document.



Note: If you happen to get this notification because you entered the exact same information as another document in the system and you don't want to save it as a revision or it is not related to the existing document you can just click the Save as New Document button at the bottom left.

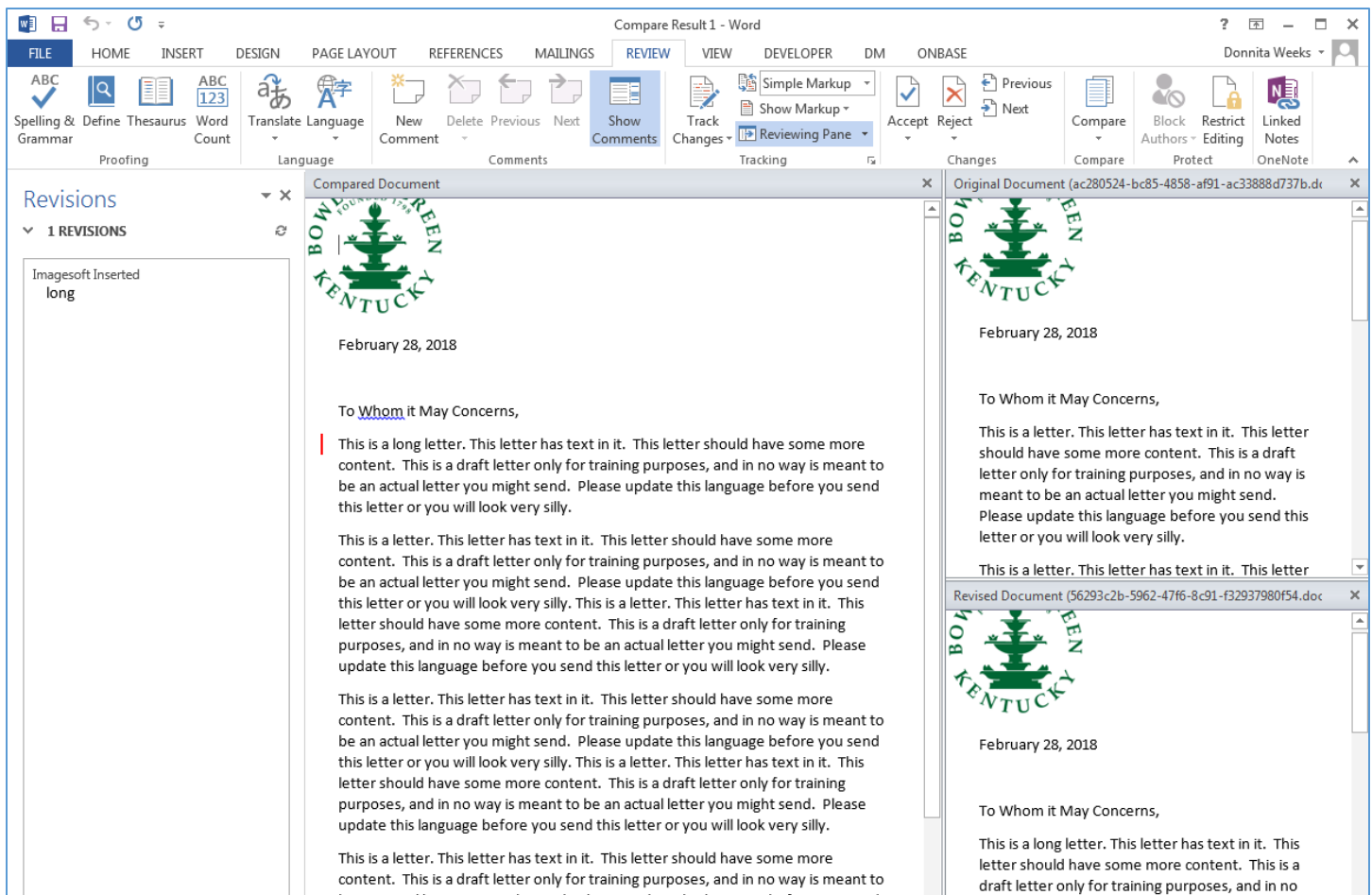
How to Compare Revisions (Word)

A nice feature of OnBase is the ability to compare revisions. This feature is only available for Microsoft Word documents. On the revisions screen check two of the revisions and click the Compare button at the bottom.

| | Version # | Revision # | File Type | Date | Comments |
|-------------------------------------|-----------|------------|------------------|------------------|----------|
| <input checked="" type="checkbox"/> | | 4 | MS Word Document | 3/1/2018 2:04 PM | 4 |
| <input type="checkbox"/> | | 3 | MS Word Document | 3/1/2018 2:04 PM | 3 |
| <input checked="" type="checkbox"/> | | 2 | MS Word Document | 3/1/2018 2:02 PM | rev 2 |
| <input type="checkbox"/> | | 1 | MS Word Document | 3/1/2018 1:56 PM | |

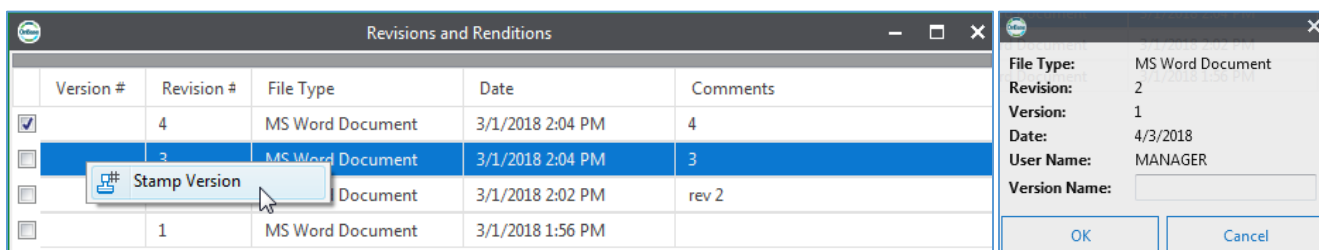
[Compare](#)

This will open up both revisions and a compared document listing any of the revisions. In the example shown below the difference between the two revisions is the word “long” was added in the first paragraph.



How to Create a Document Version

If you need to identify certain revisions as a different version (ie: rough draft, 1st draft, final draft, published) right-mouse click on the specific revision and click Stamp Version. You will then be able to enter a version name.



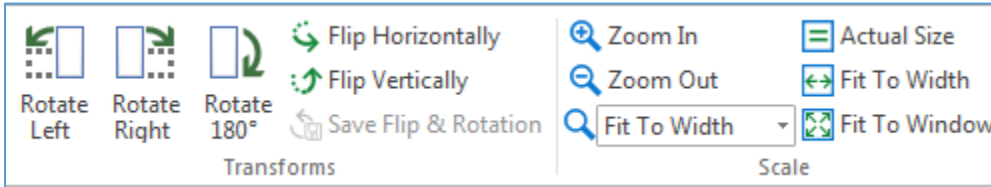
Notes:

- Please be aware that this name can only be 15 characters long and cannot be changed afterwards.
- Once you stamp a revision as a version, no previous revisions can be stamped as versions.

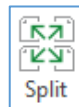
- You can toggle between seeing versions and revisions by right-clicking and selecting either Display Version Information or Display Revision Information.

How to Re-order, Rotate, Split, or Remove Pages

If you have documents that are saved in .tiff format there are several editing options. On the Image tab you can rotate or zoom in/out on the image.



If you need to reorder pages, click on the Edit Pages icon on the Image tab. From this screen you can move pages around. If you need to split one document into two select the first page of the second



document and click the Split icon at the top of the page. If you need to delete individual pages you



can click on the Delete Mode icon, click on the pages you want to delete, and then click the Delete



Selected icon. Once you have made any changes remember to click the Save and Close All icon



at the top left of the screen.

How to Add Notes

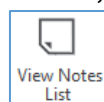
OnBase allows you to add notes to a document, like how we use Post-it® notes in the real world.

Add a Note

1. Open the document.
2. Select a note type from the **Notes Gallery** at the top.
3. Click where you want the note on the document. The maximum length of a note is 250 characters, but multiple notes can be added.
4. Double-click a note to view or edit it.

View Notes

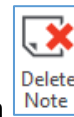
1. Hover over a note to see its text, author, and date/time.



2. Turn on **View Notes List** to see all notes on the right-hand side.

Delete Note

- Right-click the note → **Delete Note**, or



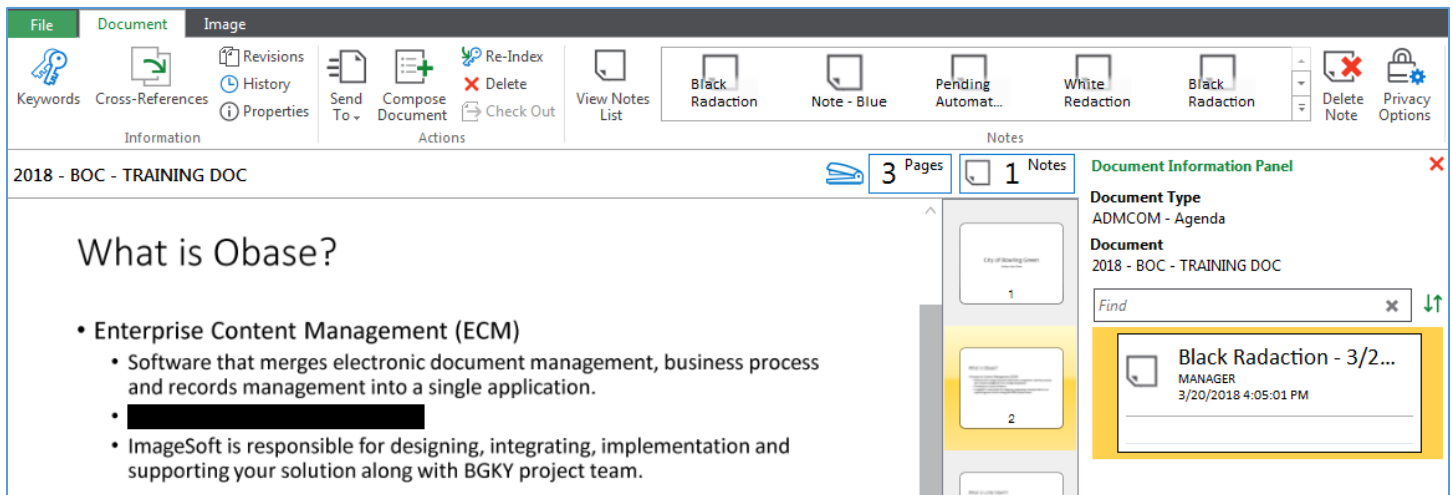
- Select the note in the panel → click the **Delete Note** icon → confirm by clicking **Yes**.

How to Add Redactions (TIFF files only)

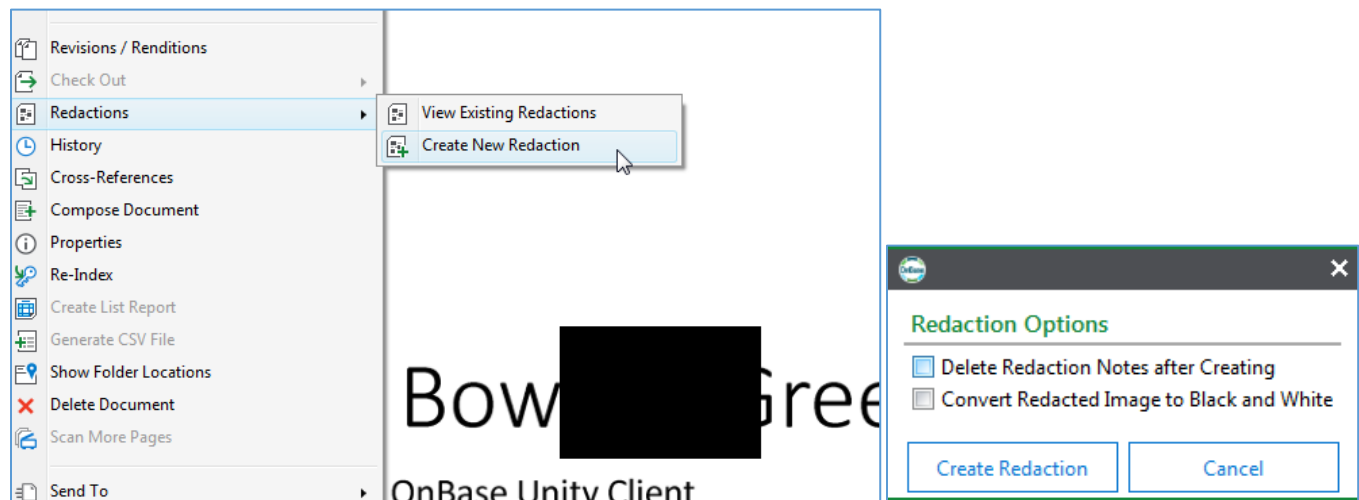
OnBase allows you to redact sensitive text from a document (this feature is only an option on .tiff files).

Redactions work very similarly to notes.

1. Open the .tiff file
2. In the **Document** tab, select a **black or white** redaction.
3. Drag over the text to redact



4. Right-click the document -> **Redactions** -> **Create New Redaction**.
5. Click **Create Redaction**. OnBase will create a new revision with the redactions for external use.




How to Convert a Document to TIFF for Redactions

1. Send to Print:
 - a. Right-click the document in search results → **Send To > Print**.
 - b. Select **Hyland Software Virtual Printer** (requires virtual print driver).
2. Print & Import:
 - a. Make any print adjustments → click **Print**.


- b. You'll be prompted to import the new document into OnBase.
- c. Enter Document Type, Document Date, and any needed keywords, then click **Import**.

Print

 **Print**

Copies:


Print To...

 Hyland Software Virtual Printer
Printing Device [Printer Properties](#)


Print Format


< Default >


Settings


 **Print All Pages**
Print the entire document


Pages:


 **Portrait Orientation**


 **No Overlay**

 **Grayscale**

 **Note Options**
None











 **Current Revision**
Print the current revision

 **Best Fit Scaling**
Fit the image to the page


 **Job Settings**
None

☐ Set As Default

File **Import**

Import Import Pages Transforms

Import  C:\OnBase Printer Spooler

Document Type Group
<All>

Document Type

File Type
Image File Format

Document Date

Neighbor

You can now use the new document to make any necessary redactions (see section above).