

Summary: This document will walk you through how to import documents into OnBase.

Prerequisites

You must have the appropriate privileges in OnBase in order to import documents.

Steps

1. On the OnBase Client menu bar click **File** then **Import**
 - a. The Import Dialog Box will open.
2. Click the **Browse** button.
 - a. Locate and select your file. Click **Open**.

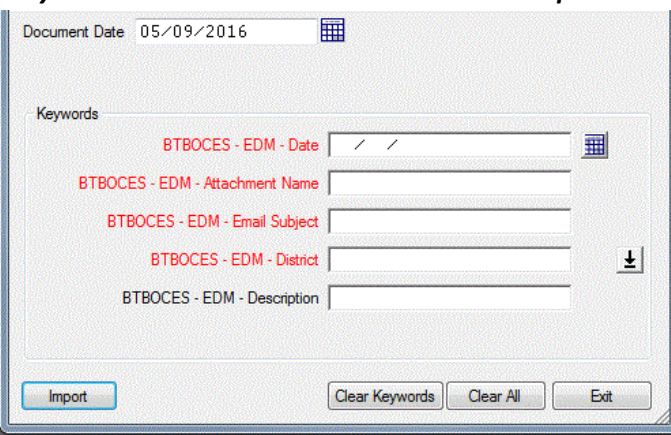
3. Select the Doc Type Group to narrow down the list of Document Types

a. 

4. Select the appropriate Document Type

a. 

5. Enter the Document Date and all necessary keywords. **Note: Keywords listed in red are required keywords and must be entered in order to import the document.**

a. 

6. Click the **Import** button to complete the import process. The document is now stored in OnBase and able to be retrieved by all who have access to it.

If you require additional help, please enter a Service-Now request at <https://scric.service-now.com> or call the South Central RIC Service-Now Help Desk at **607-766-3800**.