Quick Reference Guide
Adding a Notes in OnBase

Introduction
Below are the steps to take to add a note to a Document in OnBase.

Open a document you wish to place a note on.
Click “Public Note” or any other note choices available for the document.
Bring your mouse down to the note area, and Left Click to place your note.
To make it so you are the only one that can see the note, click on Privacy Options.

New Note!

Set Privacy Options
Write on the note...
To write on the note, click the Notes icon on the right just above your document.
Note: The number of notes on the document will be displayed to you.

1. Click on Notes
2. Write your note in this area.

You have completed the steps for Adding a Note.