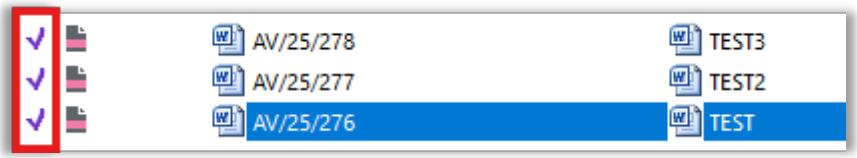
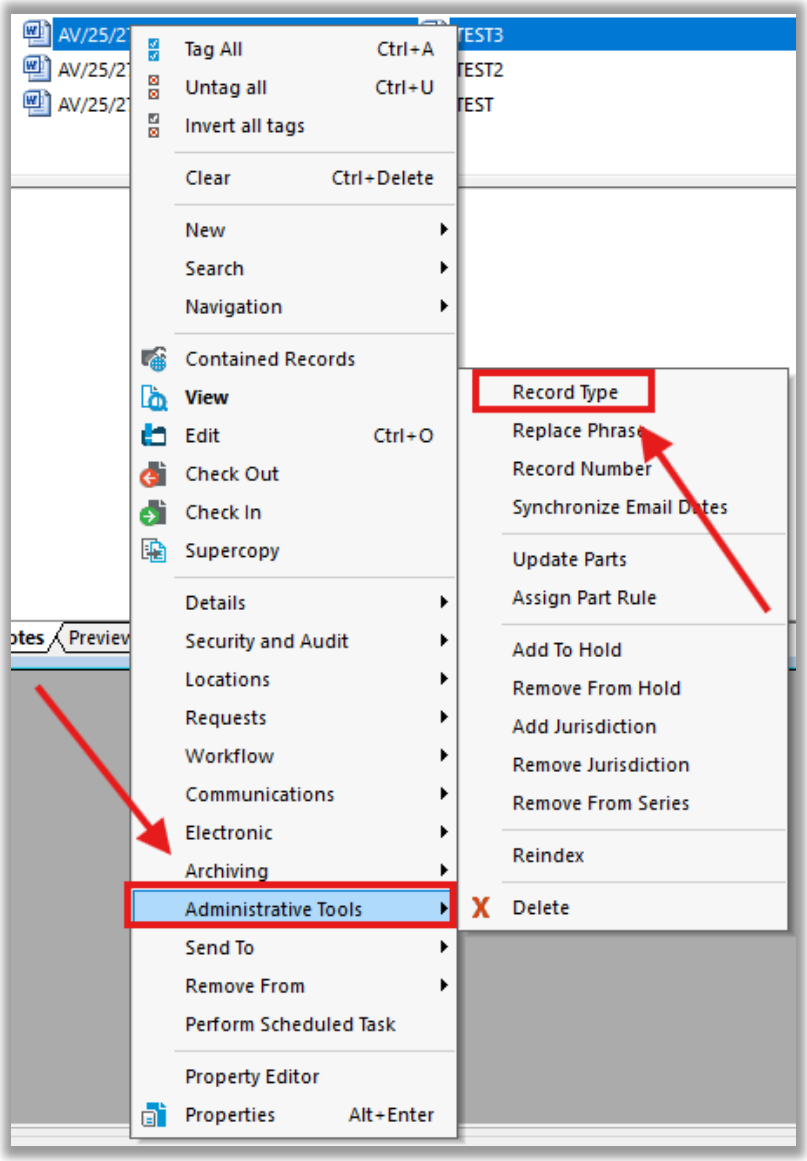
Changing the Document Record Type – Internal to Published

Note: This action can only be performed by Agency Administrators.

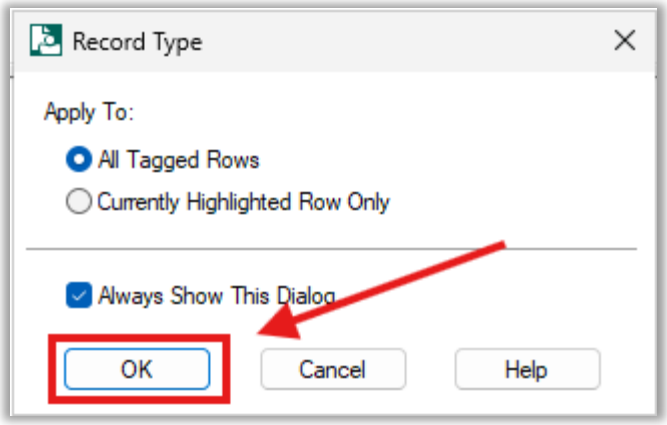
Step 1. Select the Record that you wish to **Change the record type** of (or **tag** multiple by clicking on the empty spaces to the left of each record to make a **CHECKMARK** ✓ appear).



Step 2. RIGHT-CLICK on any of the selected Records, hover over **ADMINISTRATIVE TOOLS,** then click on **RECORD TYPE**.



Step 3. Click on the **OK** button.



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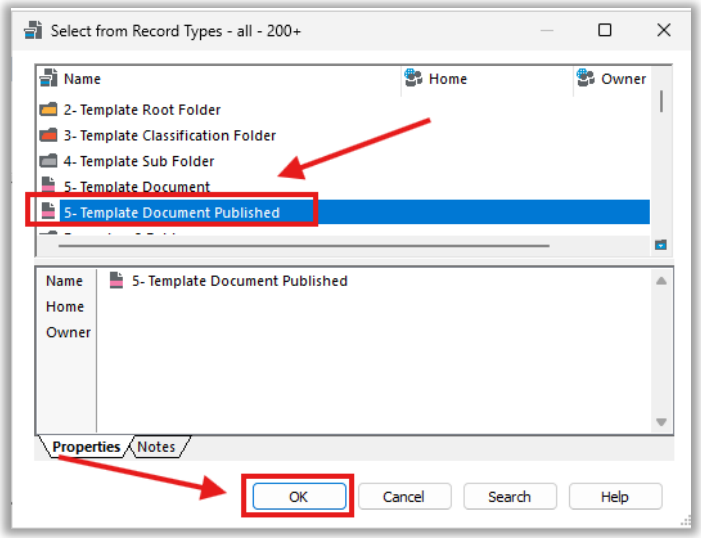
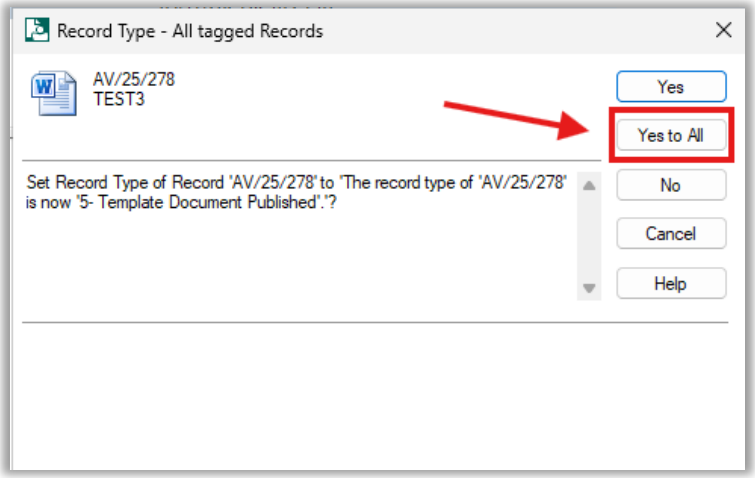
Changing the Document Record Type – Internal to Published

Step 4. Select the desired **Published Record Type** that is appropriate for your agency, then click the **OK** button.



Step 5. In the next pop-up window, click the **YES TO ALL** button.



The record type has now been changed, but the security applied to the record has not.
See next page to learn how to change **Record Security.**

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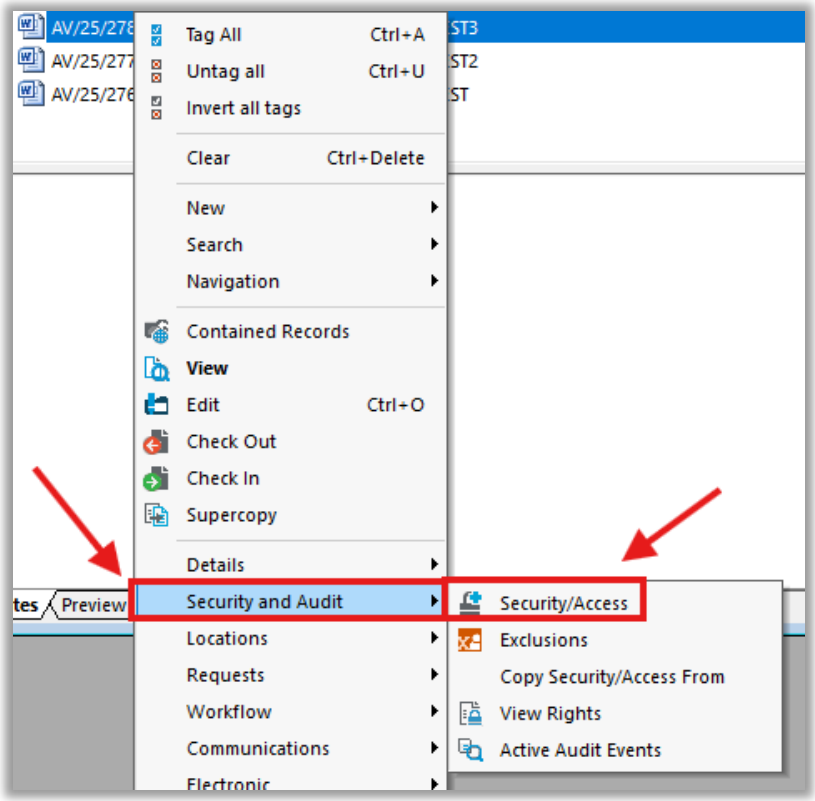
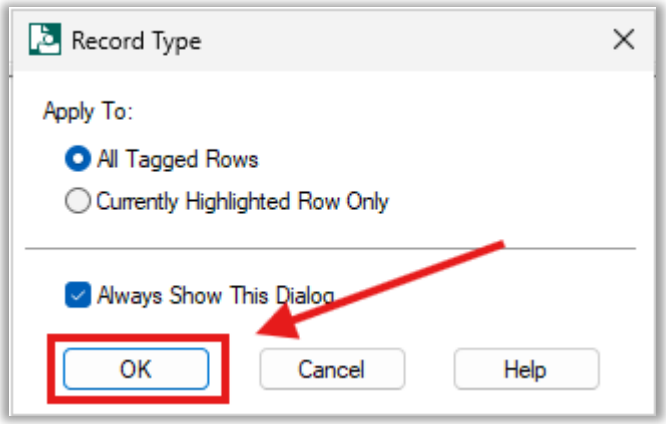
Changing the Document Record Type – Internal to Published

Changing Record Security:

Step 1. RIGHT-CLICK on your selected Record(s), hover over **SECURITY AND AUDIT,** then click on **SECURITY/ACCESS**.

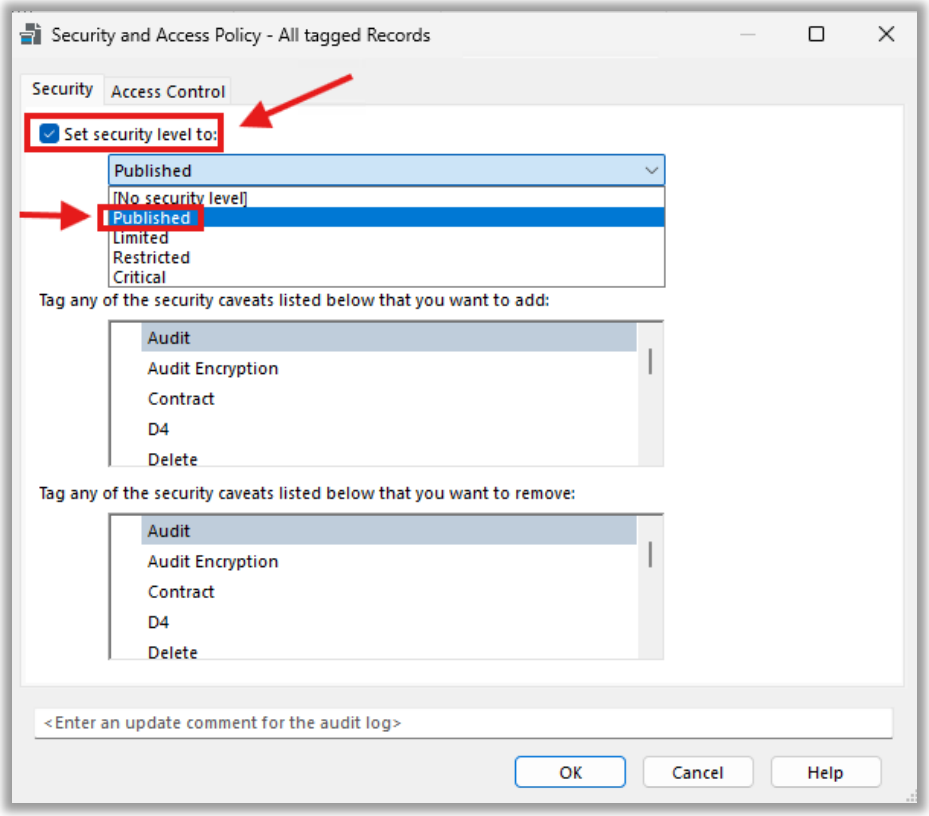


Step 2. Click on the **OK** button.



Step 3. Check the box next to **SET SECURITY LEVEL TO:**

Step 4. Select **PUBLISHED** from the drop down menu.



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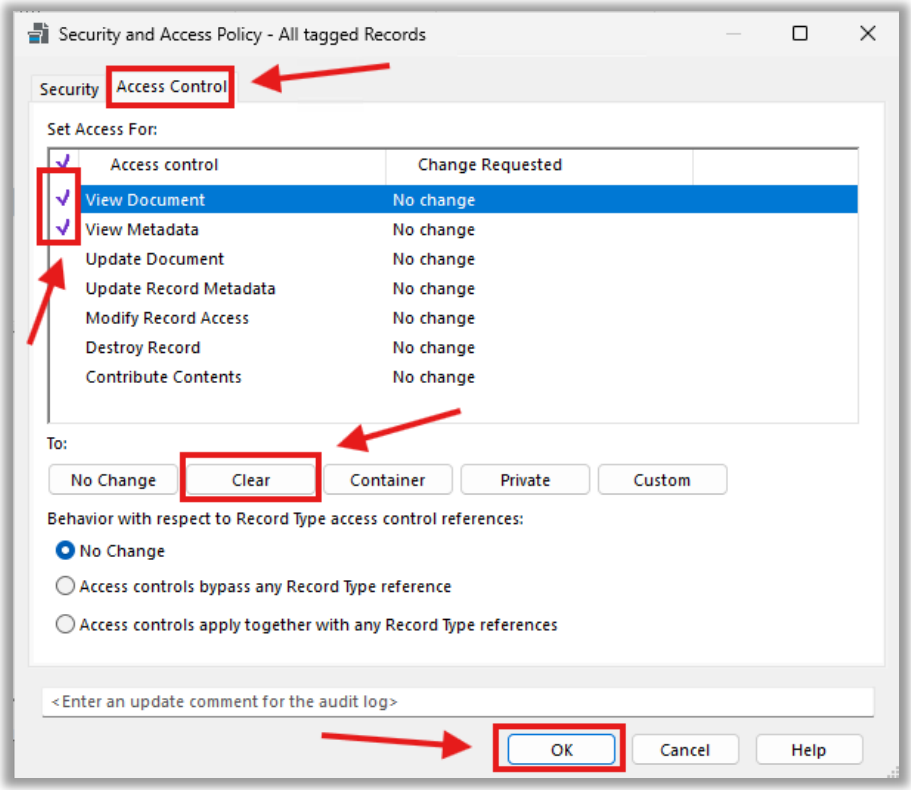
Changing the Document Record Type – Internal to Published

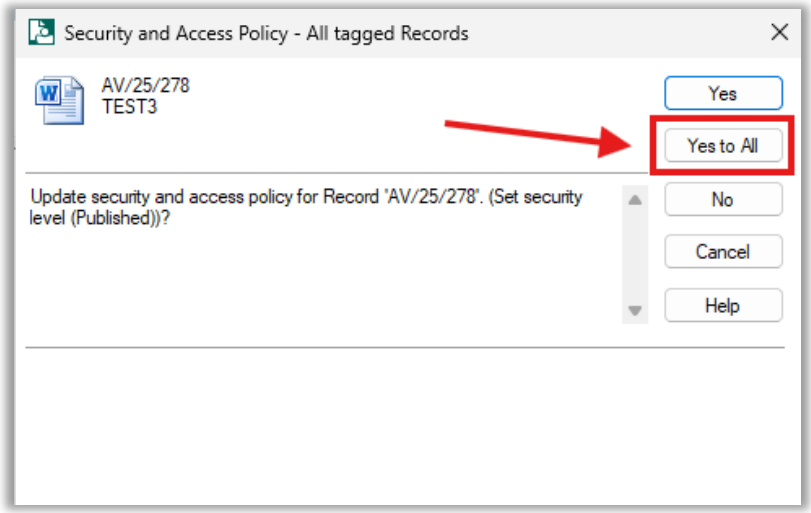
Step 5. In the same window, click on the **ACCESS CONTROL TAB**.

Step 6. Tag the **VIEW DOCUMENT** and **VIEW METADATA** options.

Step 7. Click on the **CLEAR** button then click on the **OK** button.



Step 8. Click on the **YES TO ALL** button.



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