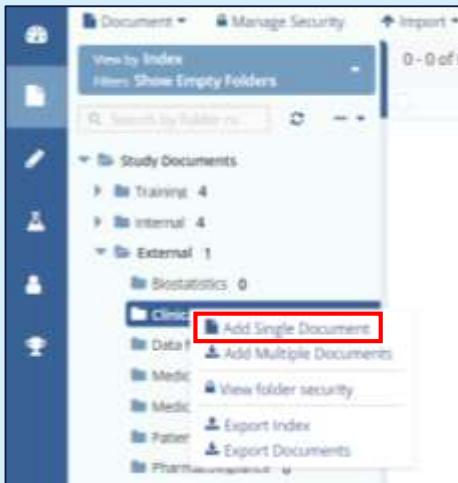


APPLICABLE TO:

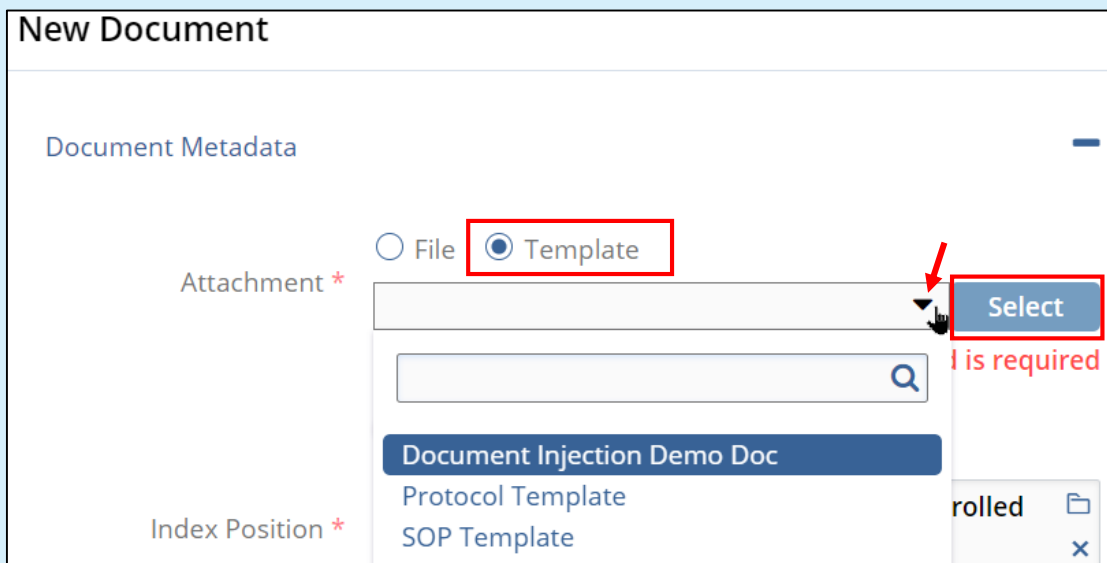
- Administrators
- eTMF
- Room Managers
- Collaborate
- Editors
- eISF
- Readers

1. Login to a **Collaborative Workspace/eISF** room and navigate to the **Index View** of the Documents module.



2. Right-click on the folder where you wish to add a document and click **Add Single Document**.

3. Check **Template** and select from the available template **options**, then **Select**.



4. Fill out required fields as well as any optional fields, as needed.

**New Document**
✕

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Category

Change Control Documents
▼

Document Type

DM\_CC
🏷️  
✕

Title \*

Document Owner

Editor 105
▼

Effective Period

30
▲  
▼

Next Review Period

45
▲  
▼

Tags

Applicable Status  
Change Reason

Document Description

5. Click **Finish** to create the document and start working on it.

**Note:** A template set up with “data injection fields” will be able to automatically populate values based on the metadata applied to the document. Contact your TI liaison for more info on enabling this function.