

How to Create a Document from a Template

TI version 10.6

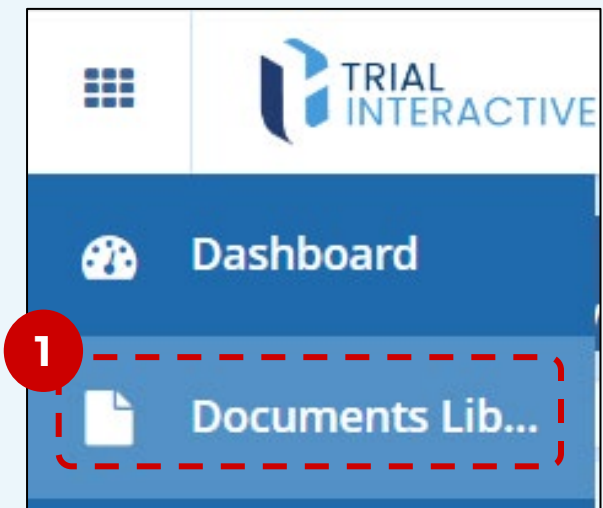
APPLICABLE TO:

- Admin
- Manager
- Editor
- Reader
- Collaborate
- eISF

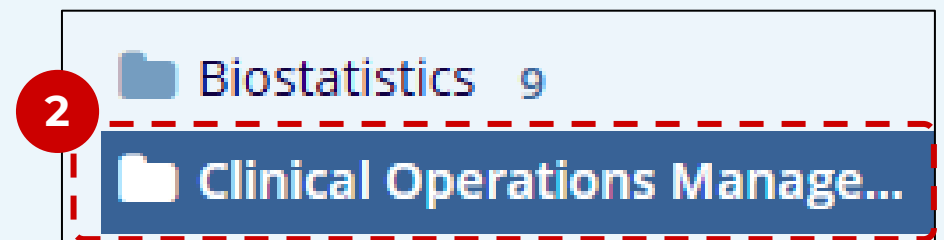


This feature must be configured before use and may not be present in your room. Check with your Administrators.

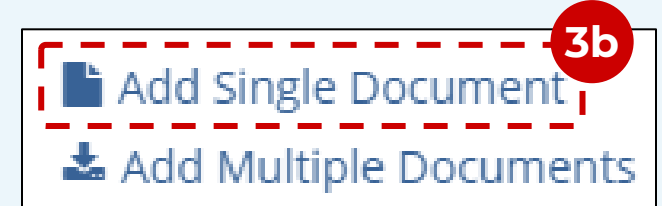
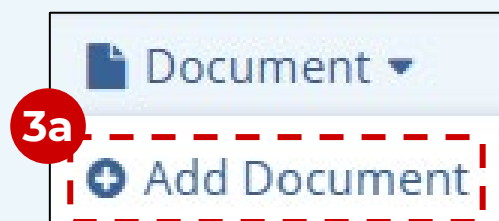
- 1 Navigate to the **Documents Library**.



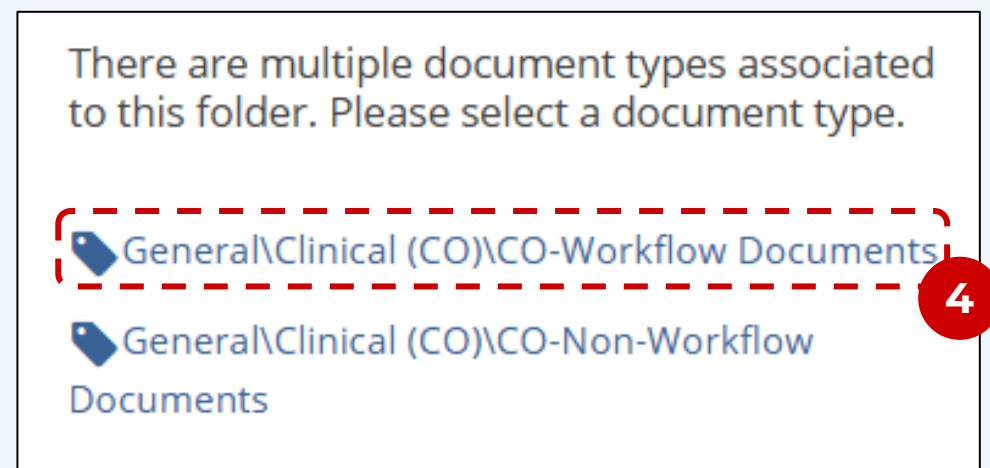
- 2 Select the folder where you wish to store the document.



- 3 Select a **single document** upload method.
(3b can be displayed by right-clicking the folder name.



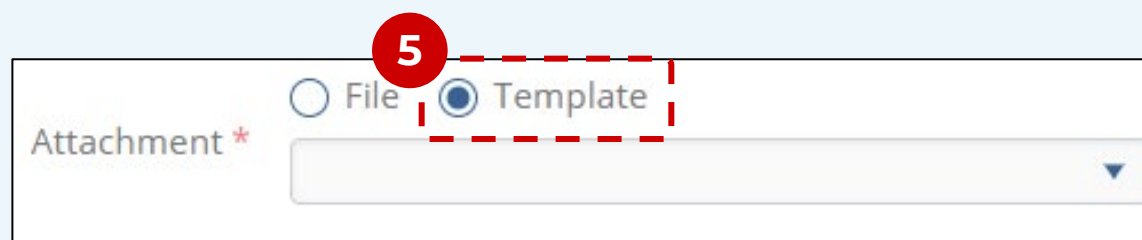
- 4 You may be prompted to select a document type. Just **click** on the option relevant to the document.



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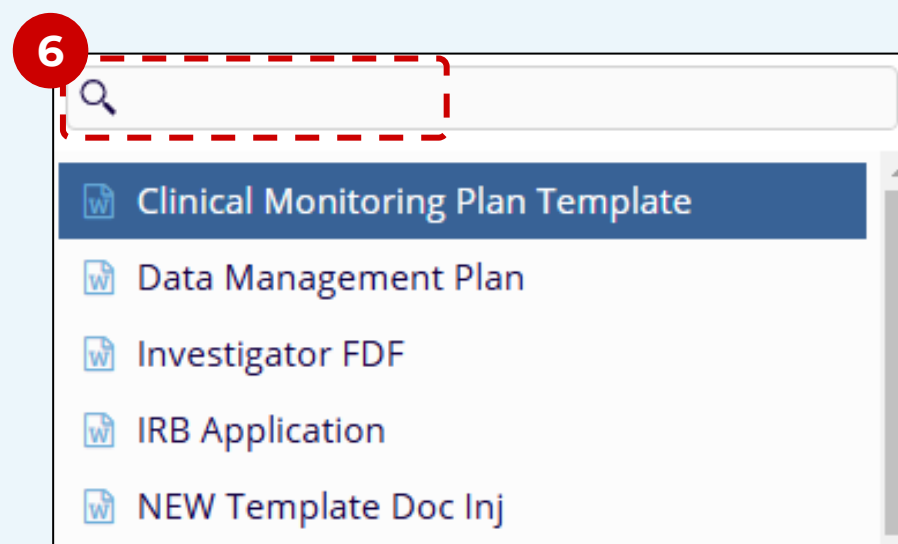
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5 At the Attachment field, select the radio button for **Template**.



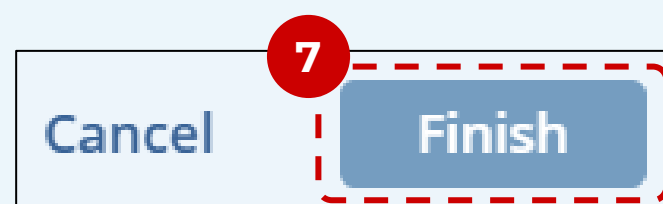
The screenshot shows a form field labeled "Attachment *". Above the field are two radio buttons: "File" and "Template". The "Template" radio button is selected and highlighted with a red dashed box and a red circle containing the number 5. Below the radio buttons is a dropdown menu.

6 Use the **Dropdown list** to select one of the available templates. You can also type to narrow your results.



The screenshot shows a search input field with a magnifying glass icon, highlighted with a red dashed box and a red circle containing the number 6. Below the input field is a dropdown list of templates, including "Clinical Monitoring Plan Template", "Data Management Plan", "Investigator FDF", "IRB Application", and "NEW Template Doc Inj".

7 Complete the rest of the metadata as usual. Click **Finish** to generate the document.



The screenshot shows two buttons: "Cancel" and "Finish". The "Finish" button is highlighted with a red dashed box and a red circle containing the number 7.



For info on the general document setup process, you can see job aid: **Collaborate - How to Upload a Document**.