

APPLICABLE TO:

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

Trial Interactive allows document templates to be configured with data fields that will automatically populate with values from the metadata associated with the documents created from such a template.

Values are populated upon check-in of a document, and again during the finalization of a controlled document workflow.

Part 1: Configuration of data fields in a Word document.



This section contains guidance on the use of a third-party product and should only be taken as general advice. TransPerfect makes no guarantees as to the accuracy of this information at any given time.

1 Enable the Developer tab in Word. This is generally not displayed by default.



a) On Windows:

- open **File**. Click on **Options > Customize Ribbon** [In some older Office releases, right-click on blank space within the Ribbon and select **Customize the Ribbon...**].
- Within the **Customize the Ribbon** menu, and under **Main Tabs**, check the box for **Developer**.

b) On MacOS:

- On the **Word** menu, select **Preferences**.
- Select **Ribbon and Toolbar > Customize the Ribbon > Main Tabs**.
- Check **Developer** and select **Save**.



List of applicable Word releases:

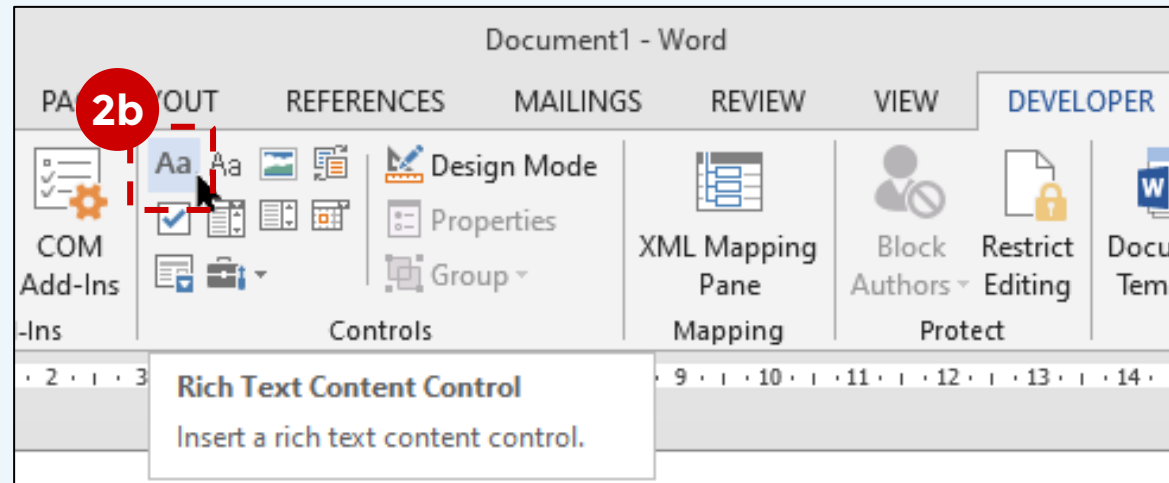
Word for Microsoft 365, Word for Microsoft 365 for Mac, Word 2021, Word 2021 for Mac, Word 2019, Word 2019 for Mac, Word 2016, Word 2016 for Mac, Word 2013, Word 2010.

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2 Set up a Word document to use data field:

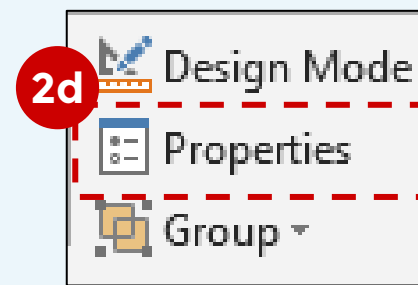
- Select a location on page where data will be filled.
- In the Developer tab, click on **Rich Text Control**.



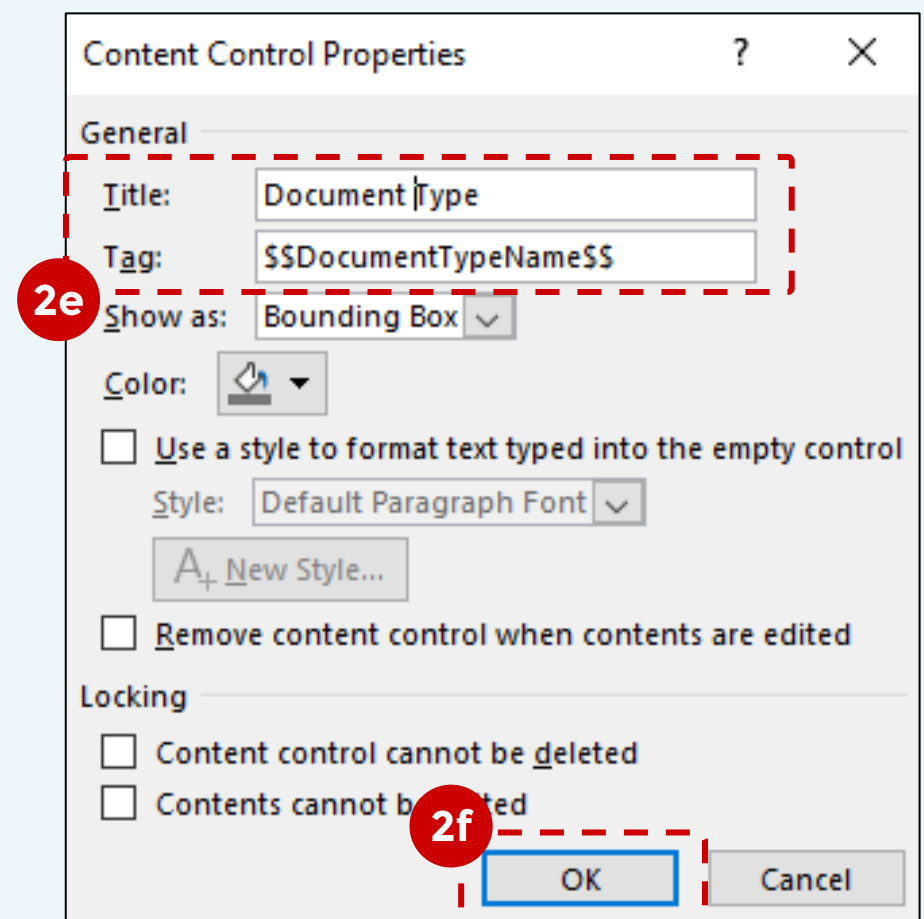
- A content box appears on the page.



- In the Developer tab, click on **Properties** (do not deselect the content box when doing this).



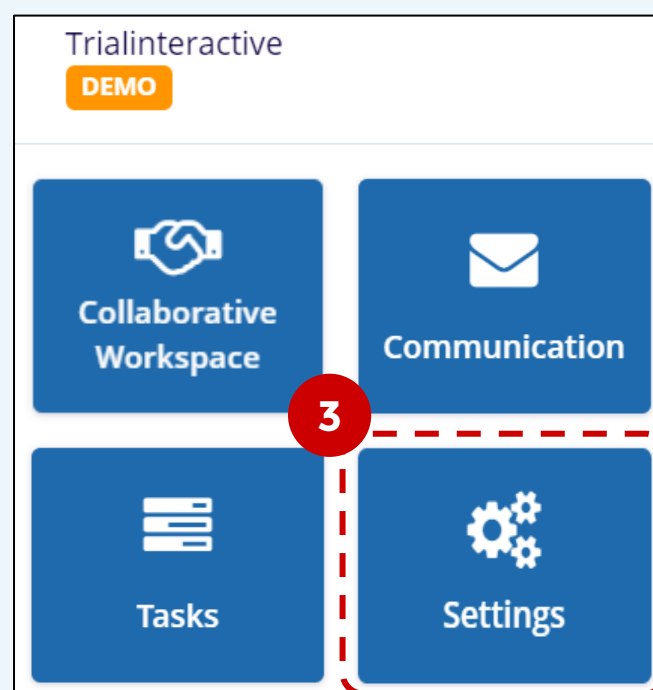
- Assign a **Title** and a **Tag** to the field. The Title should be the **name** of the Metadata as it appears in the eTMF, and the Tag should be the **system value** for that field. Click **OK**.



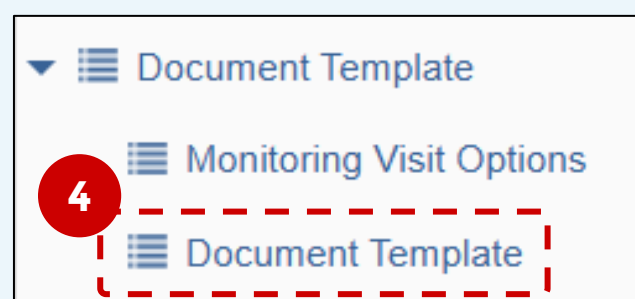
Repeat this process for any field you want to auto-fill in your template.

Part 2: Setting Up a TI room with template documents.

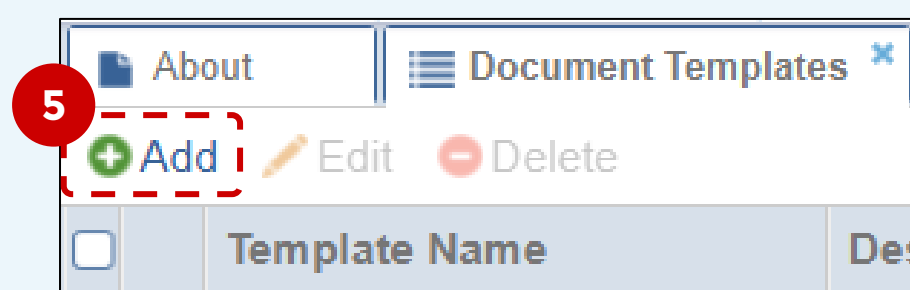
3 Enter a room and navigate to **Settings**.



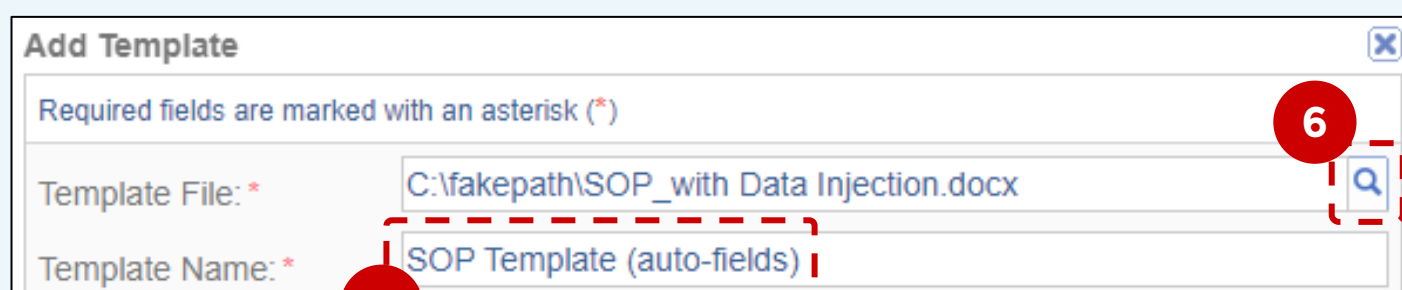
4 Expand the Document Template entry and select **Document Template**.



5 Click on the **Add** button.



6 Attach the Word document set up in Part 1 (use the lens icon to browse).



7 Give the template a descriptive name.

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8 In the same window, check the box for 'contains data fields'.

9 Complete all required fields and click **Create**.

10 The template is now ready for use at the **Add Document** interface.

11 If directly uploading a document configured as detailed in Part 1, the system also supports Data Injection, but it is necessary to toggle **Use Placeholder fields in the Document** on.