How to Create a Document from a Template

TI version 10.7

TRIAL INTERACTIVE

APPLICABLE TO:

- ● Admin
- ● Manager
- ● Editor
- ○ Reader
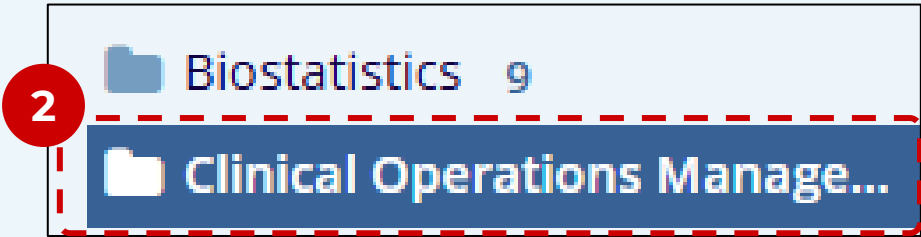- ● Collaborate
- ● eISF

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

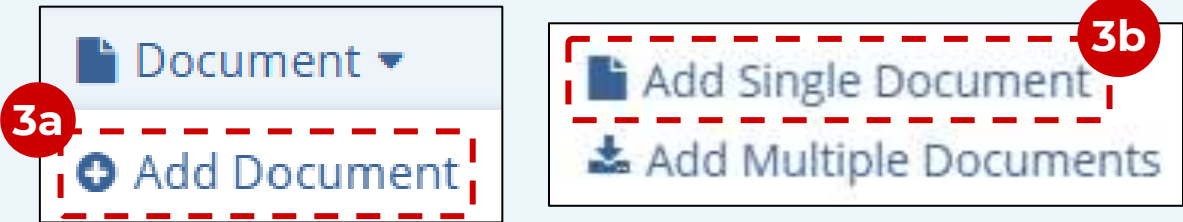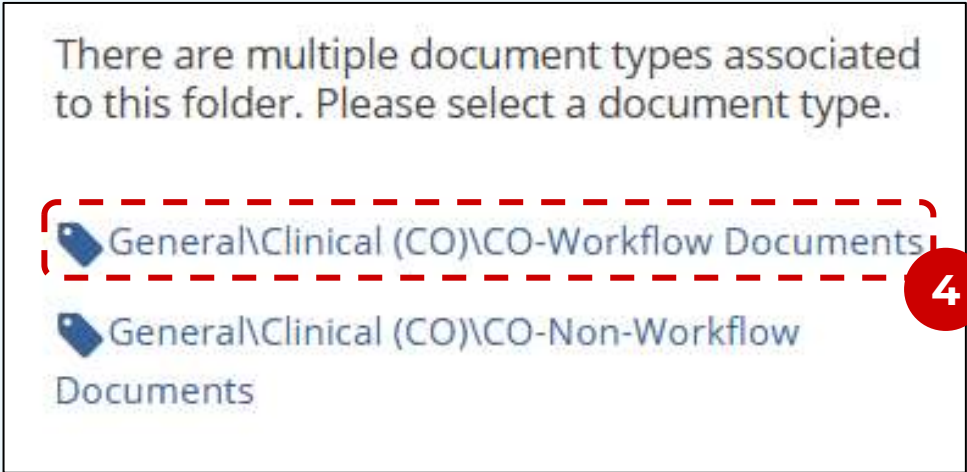**1** Navigate to the **Documents Library**.

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

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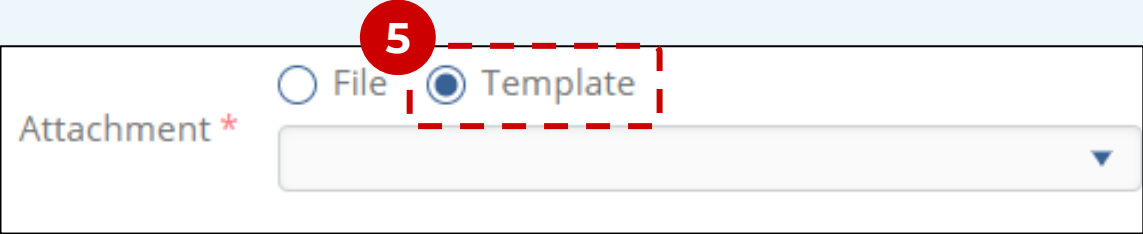(3b can be displayed by right-clicking the folder name.

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

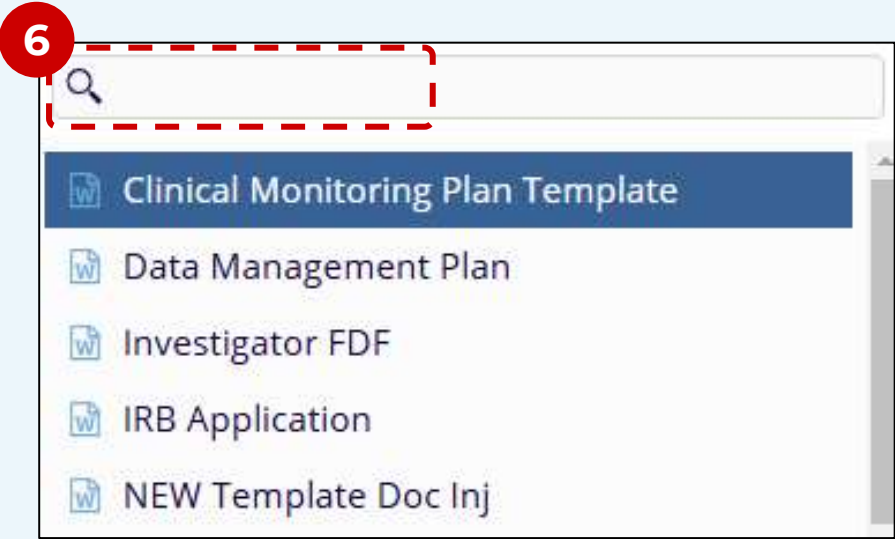> There are multiple document types associated to this folder. Please select a document type.
>
> 🏷️ General\Clinical (CO)\CO-Workflow Documents
> 🏷️ General\Clinical (CO)\CO-Non-Workflow Documents

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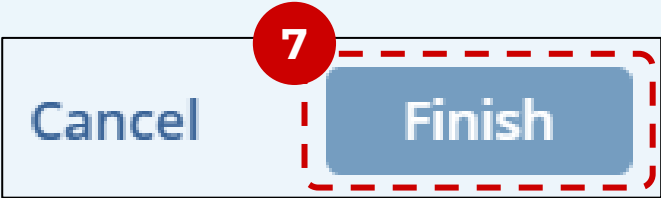
Attachment * ○ File ● Template

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

🔍

📄 Clinical Monitoring Plan Template
📄 Data Management Plan
📄 Investigator FDF
📄 IRB Application
📄 NEW Template Doc Inj

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

Cancel   Finish

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

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