

How to Create a Document from a Template

TI version 10.7

- APPLICABLE TO:
- Admin

Manager

Editor

Reader

Collaborate

eISF

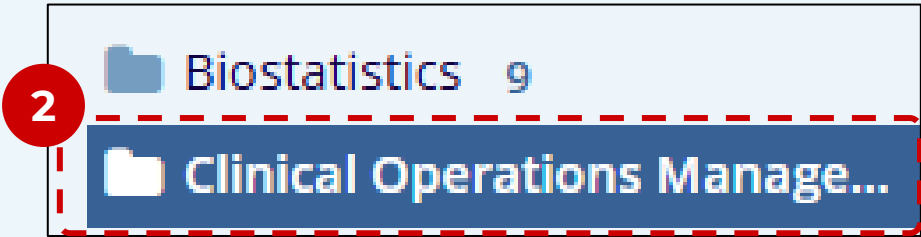


This feature must be configured before use and may not be present in your room. Check with your Administrators.

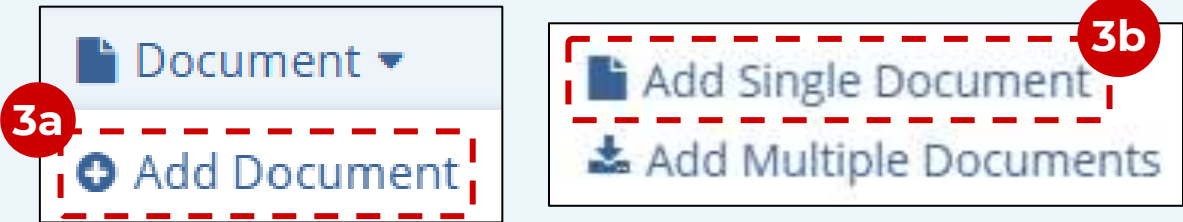
- 1
- Navigate to the **Documents Library**.



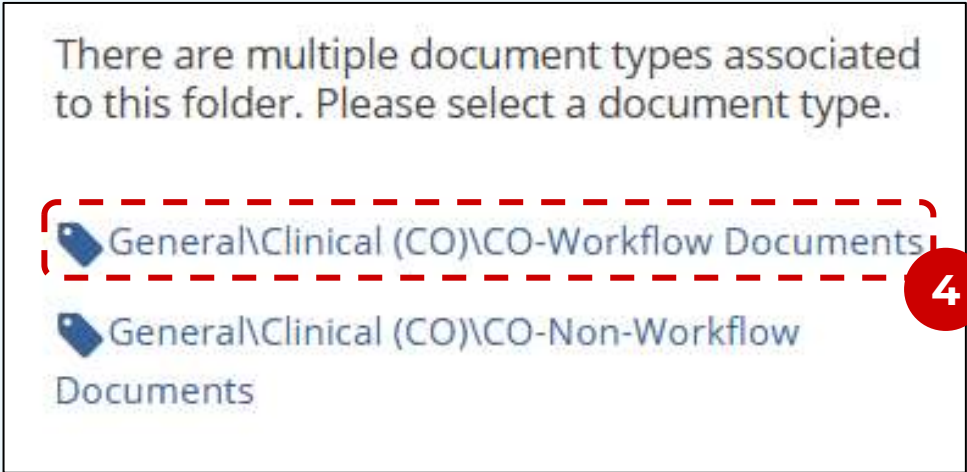
- 2
- Select the folder where you wish to store the document.



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



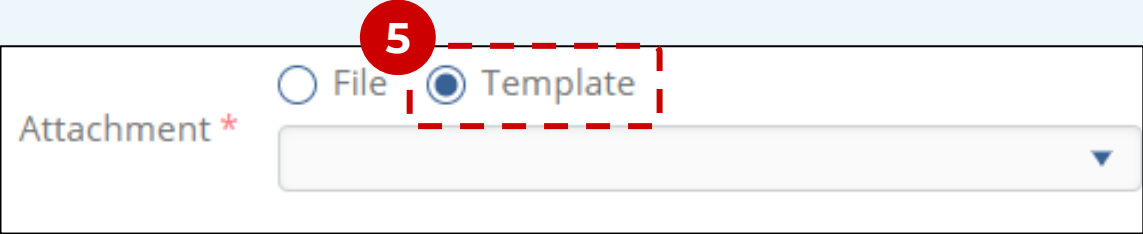
- 4
- You may be prompted to select a document type. Just **click** on the option relevant to the document.



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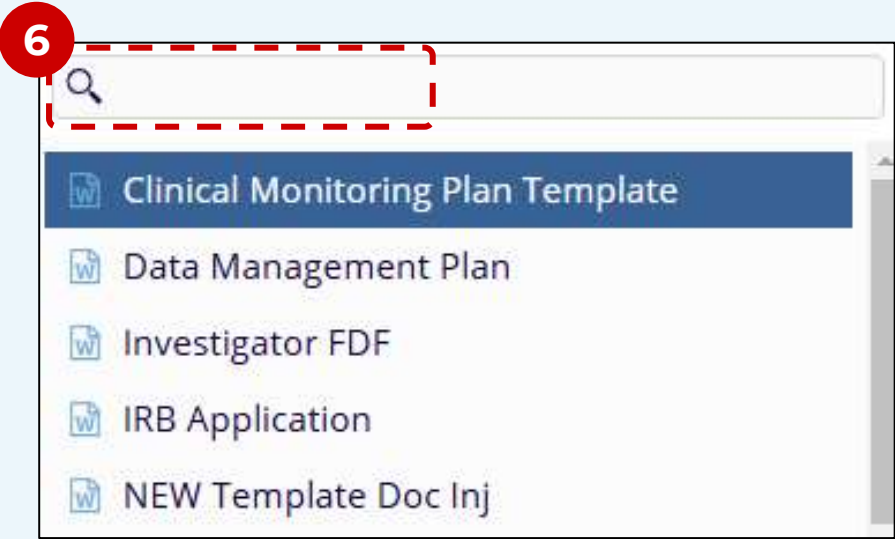
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5 At the Attachment field, select the radio button for **Template**.



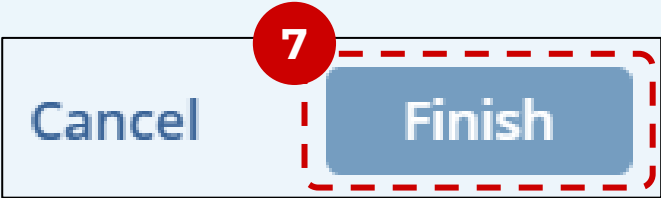
A screenshot of the 'Attachment' field in the software interface. It features two radio buttons: 'File' and 'Template'. The 'Template' radio button is selected, indicated by a blue dot. A red dashed box highlights the 'Template' radio button and the text 'Template'. A red circle with the number '5' is positioned above the dashed box. 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.



A screenshot of the dropdown list that appears when the 'Template' radio button is selected. The list contains five items, each with a document icon: 'Clinical Monitoring Plan Template', 'Data Management Plan', 'Investigator FDF', 'IRB Application', and 'NEW Template Doc Inj'. The first item, 'Clinical Monitoring Plan Template', is highlighted in blue. A red dashed box highlights the search input field at the top of the dropdown, which contains a magnifying glass icon. A red circle with the number '6' is positioned above the dashed box.

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



A screenshot of the 'Cancel' and 'Finish' buttons. The 'Finish' button is highlighted with a blue background and a red dashed border. A red circle with the number '7' is positioned above the 'Finish' button.



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