

How to Set Up Data Injection for Word Templates

TI version 10.7

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**.

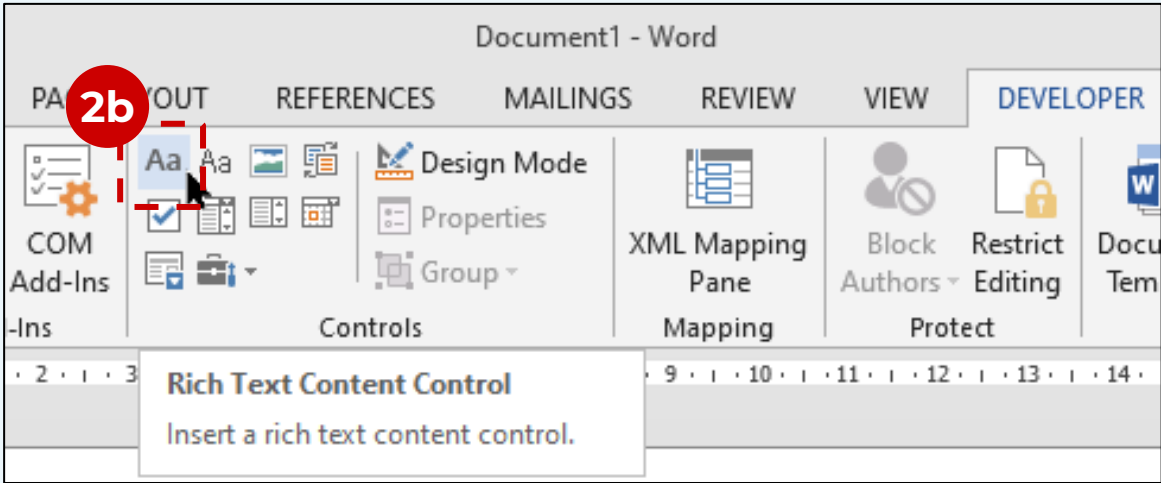


List of applicable Word releases:
Word for Microsoft 365, Word for Microsoft 365 for Mac, Word 2021, Word 2021 for Mac, Word 2019, Word 2019 for Mac, Word 2016, Word 2016 for Mac, Word 2013, Word 2010.

2

Set up a Word document to use data field:

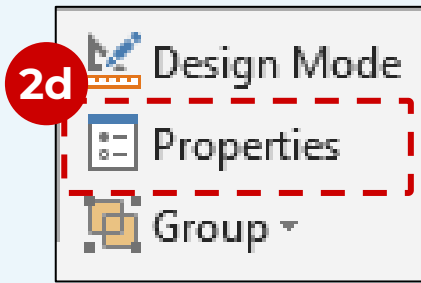
- a) Select a location on page where data will be filled.
- b) In the Developer tab, click on **Rich Text Control**.



- c) A content box appears on the page.

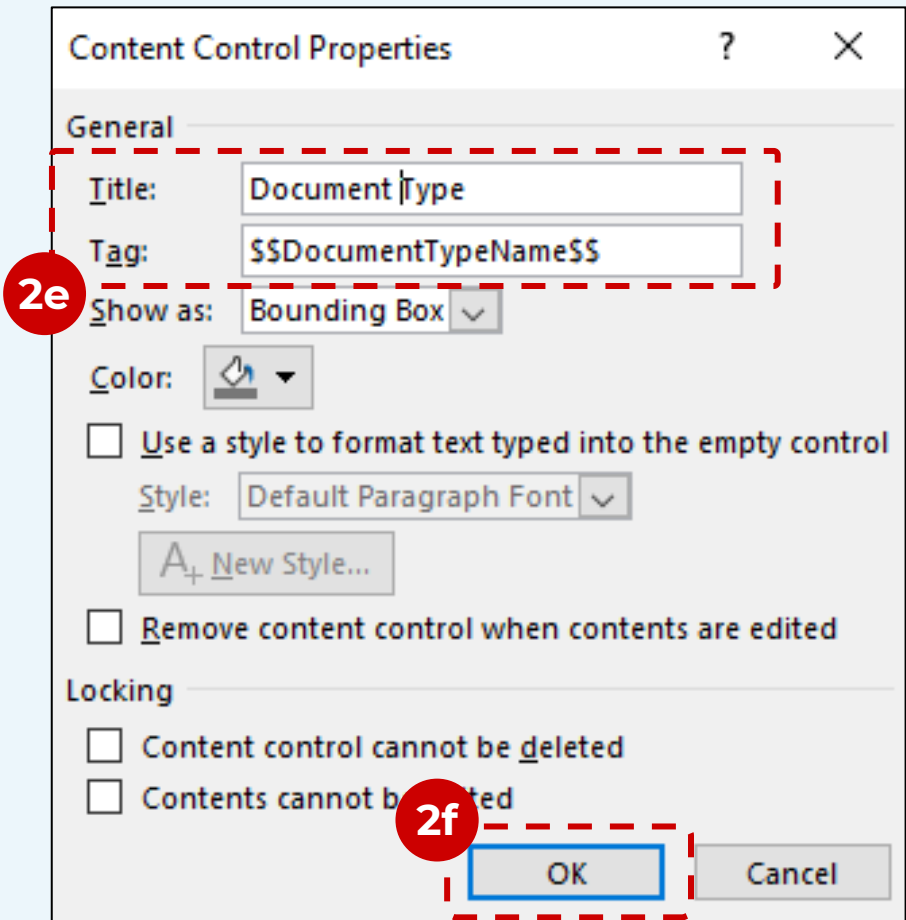


- d) In the Developer tab, click on **Properties** (do not deselect the content box when doing this).



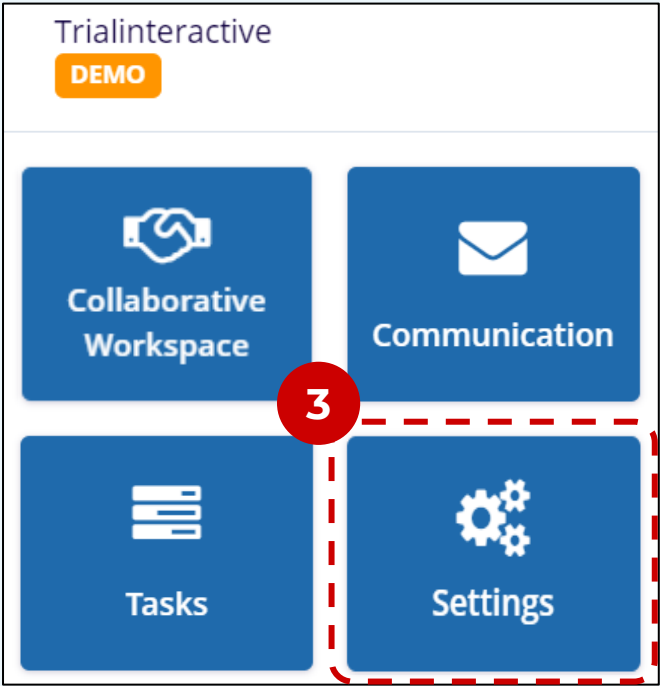
- e) Assign a **Title** and a **Tag** to the field. The Title should be the **name** of the Metadata as it appears in the eTMF, and the Tag should be the **system value** for that field. Click **OK**.

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

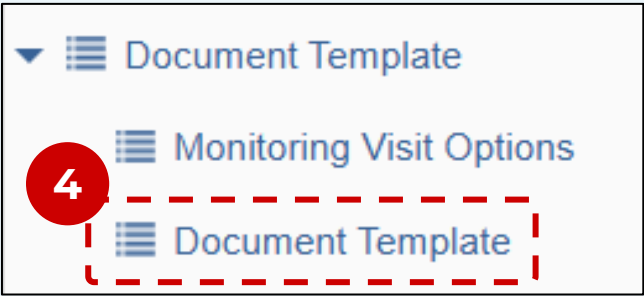


Part 2: Setting Up a TI room with template documents.

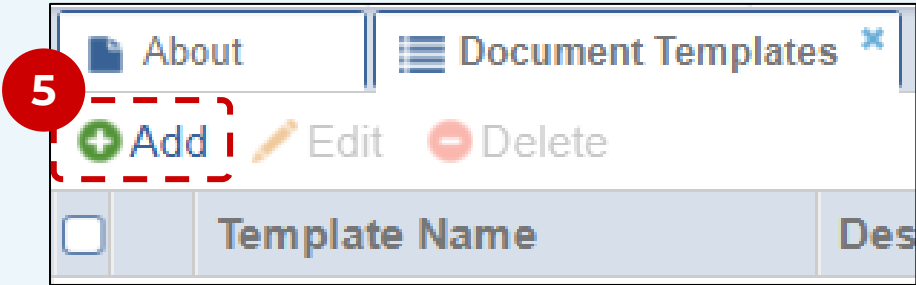
3 Enter a room and navigate to **Settings**.



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

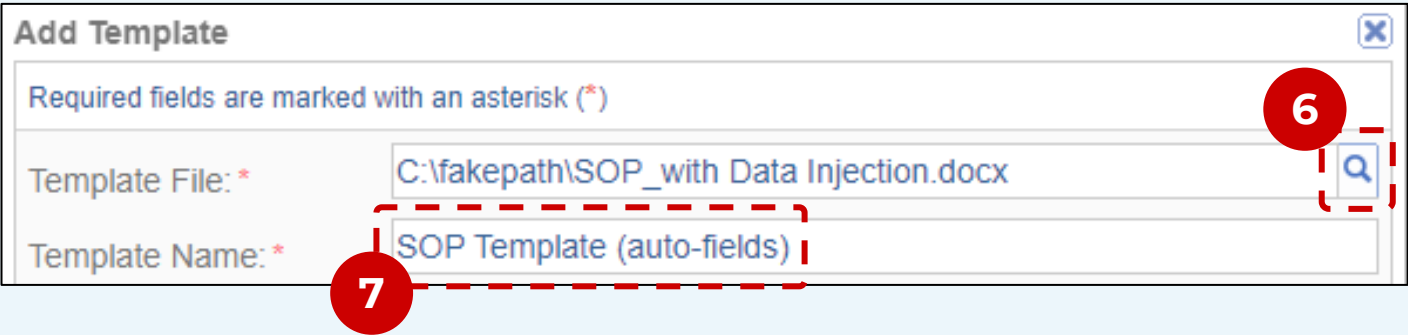


5 Click on the **Add** button.



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

7 Give the template a descriptive **name**.

A screenshot of the 'Add Template' form. It has two main fields: 'Template File: *' and 'Template Name: *'. The 'Template File' field contains the text 'C:\fakepath\SOP_with Data Injection.docx' and has a lens icon for browsing. The 'Template Name' field contains the text 'SOP Template (auto-fields)'. Both fields are highlighted with red dashed borders and red circles with the numbers 6 and 7 respectively.

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

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

Description:

8

☒ Does this template has data field placeholder?

Collection Type: *

General

Default Workflow:

Not specified

Category: *

☒ General

☐ All Sites

☐ Specific Country

Select No countries selected

☐ Specific Site

Select No Sites selected

Document Type:

9

Create

Cancel

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

Collaborative Workspace

10

+ Add Document

Mass Coding

Attachment *

☐ File ☒ Template

SOP Template

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.

☒ File ☐ Template

Clinical Trial Agreement Template.doc

11

☒ Use Placeholder fields in the Document