APPLICABLE TO:

- ● Administrators
- ○ Managers
- ○ Editors
- ○ Readers

- ● 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, as well as 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 the information at any given time.

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

a) <u>On Windows</u>:

- open **File**. Click on **Options** > **Customize Ribbon** [In previous Office releases, <u>right-click</u> on blank space within the Ribbon and select **Customize the Ribbon…**]
- Within the **Customize the Ribbon** menu, and under **Main Tabs**, enable the checkbox for **Developer**

b) <u>On MacOS</u>:

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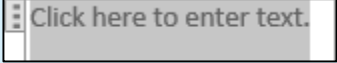- Check **Developer** and select **Save**.

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 template with data fields.

a) First select the location where a data field will be.

b) In the Developer tab, click on the **Rich Text Control** icon.
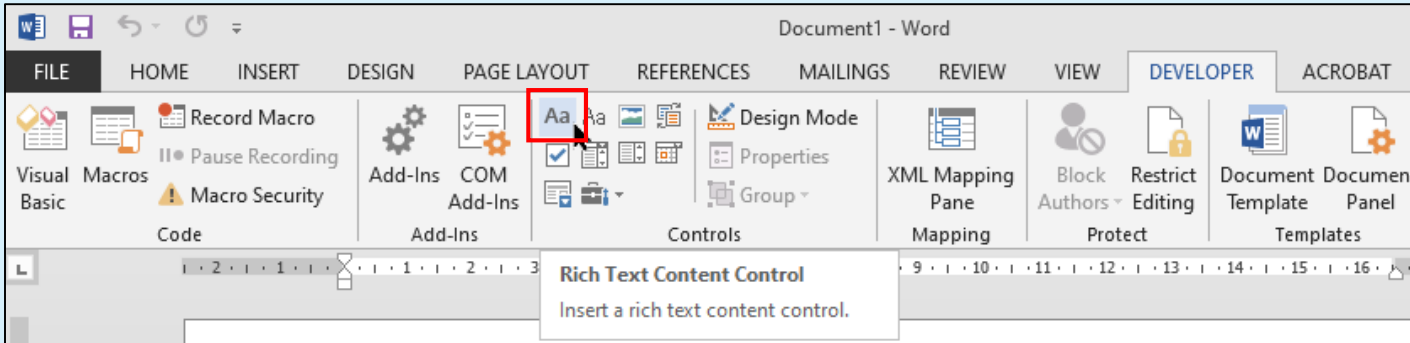
c) A content box will appear.   Click here to enter text.

d) In the Developer tab, click on **Properties** (do not deselect the content box when doing this).
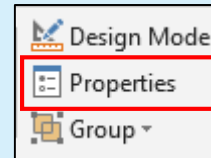
e) Assign a **Title** and **Tag** to the field. The **Title** should be the name of the Metadata you intend to populate. The **Tag** should be the system value for that field (found in Settings>Form Settings within TI).

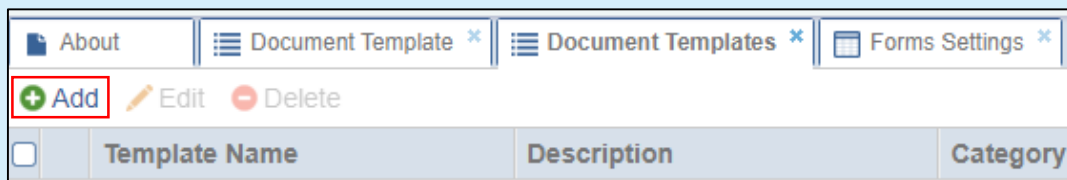f) Repeat for all intended data injection fields and **Save** your template.
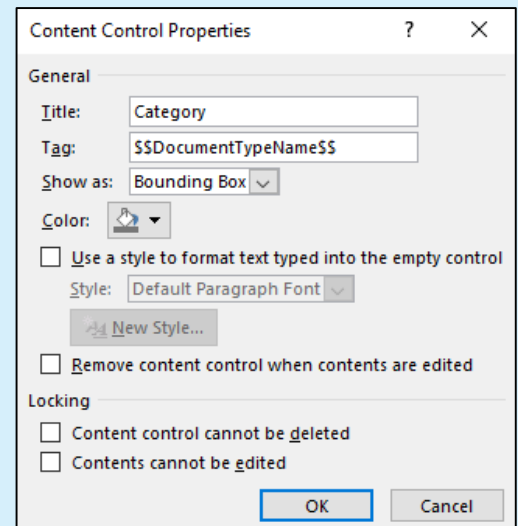
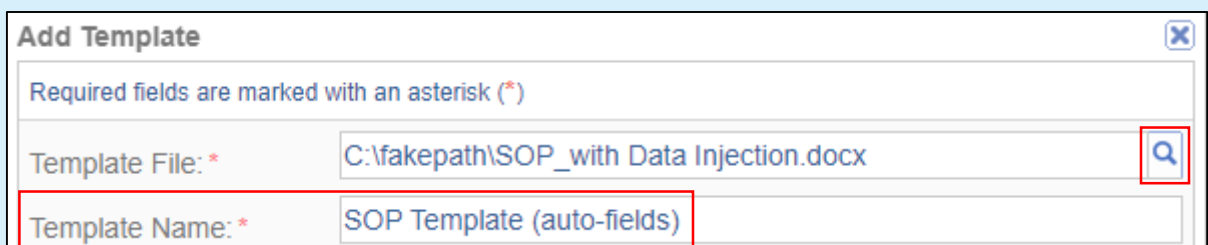## Part 2: Setting up Word Template in a TI Room.

3. Navigate to **Settings**. Expand **Document Template** and select **Document Template**.
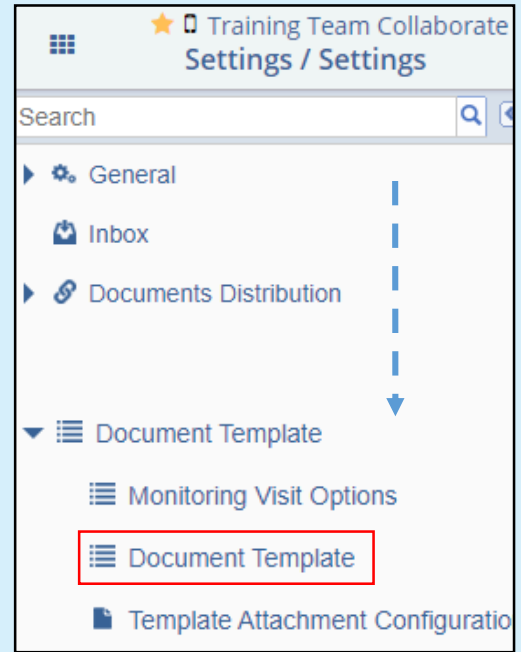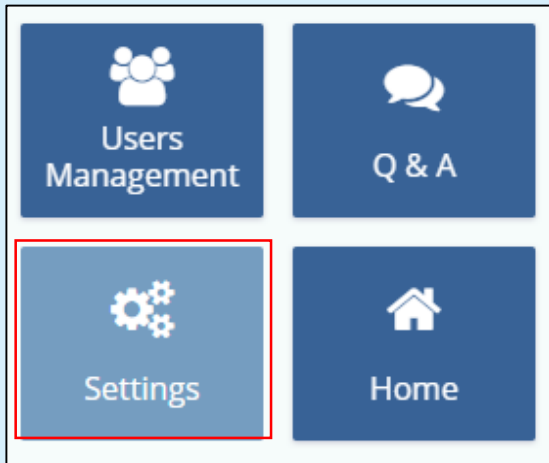
4. Click on **Add**.

5. Attach the Word document set up in Part 1 (use the lens icon to browse). Give the **template** a descriptive name.

6. Make sure to check the box for 'contains data fields'.
Complete all required fields and click **Create**.

Add Template

Required fields are marked with an asterisk (*)

Template File: *	C:\fakepath\SOP_with Data Injection.docx
Template Name: *	SOP Template (auto-fields)
Description:	

☑ 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:

[Create] [Cancel]

7. Users in the room can now create documents from this
template. Data fields will be auto-completed when checking
in or approving a document.