

# How to Create a Document from a Template

TI version 10.8

- APPLICABLE TO:
- Admin

Manager

Editor

Reader

Collaborate

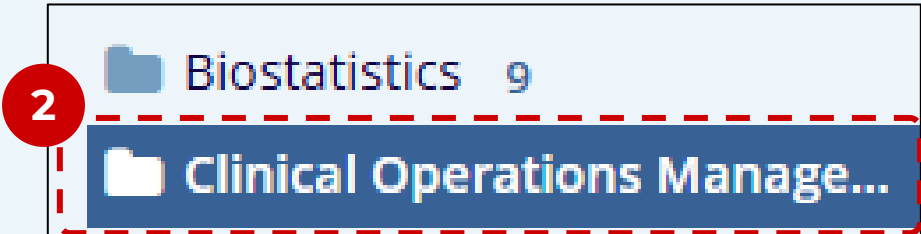
eISF

 This feature must be configured before use and therefore may not be present in all rooms. In case of doubt, ask a Room Administrator.

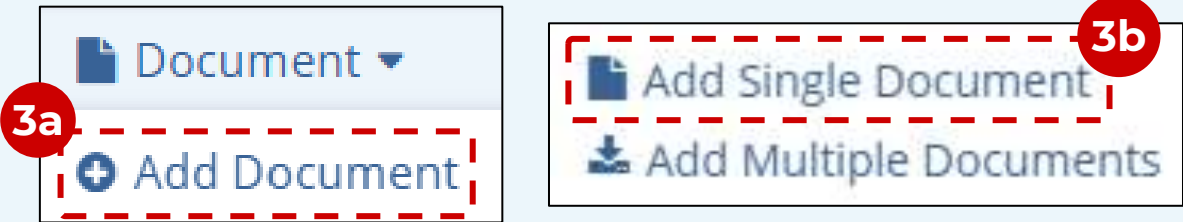
1 Navigate to the **Documents Library**.



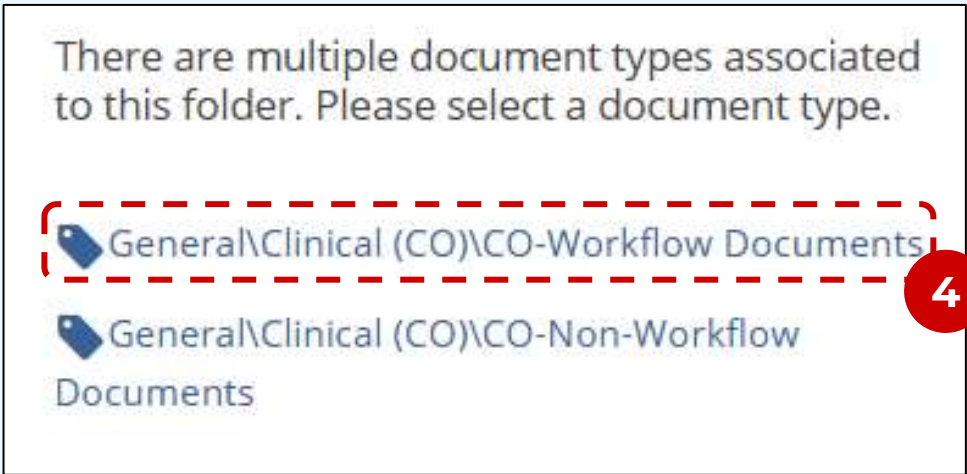
2 Select the folder where you wish to store the document.



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

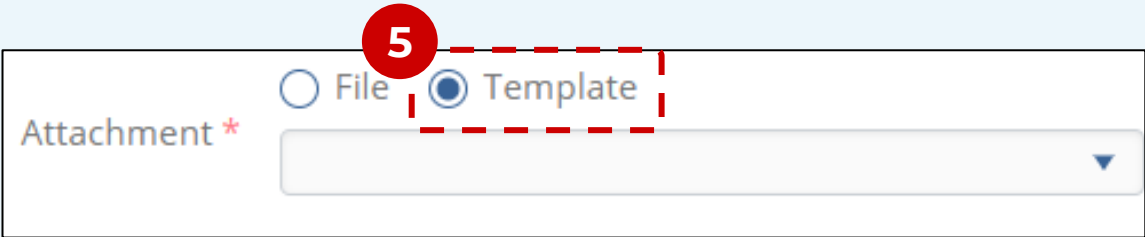


4 You may be prompted to select a document type. Just **click** on the option relevant to the document.



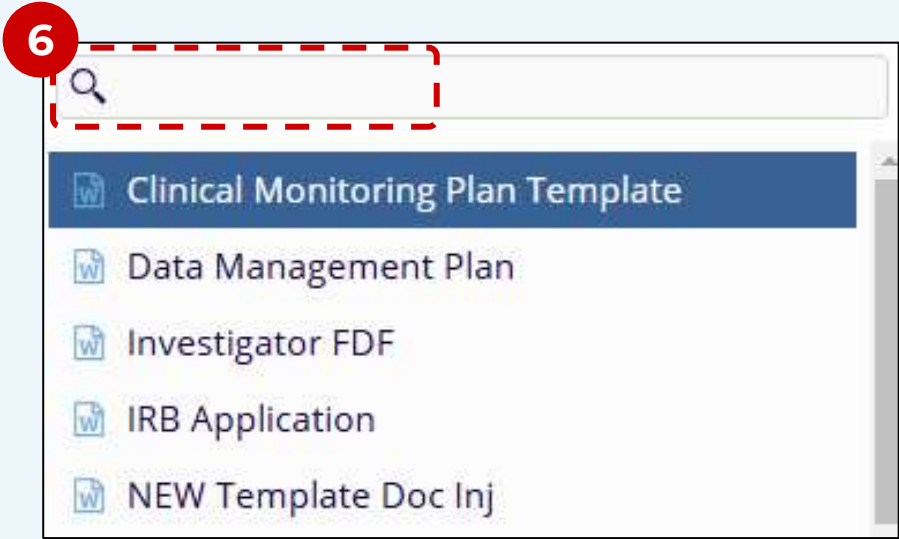
# How to Create a Document from a Template

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



A screenshot of the 'Attachment' field in the software. 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' option, with a red circle containing the number '5' next to it.

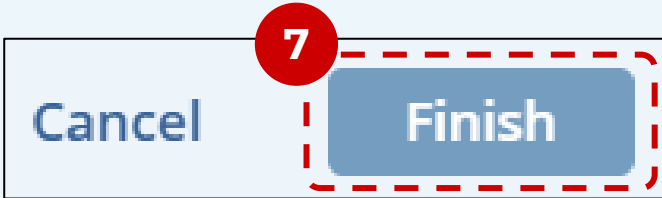
**6** Use the **Dropdown list** to select one of the available templates. You can also type to narrow your results.



A screenshot of a dropdown menu. The search bar at the top is highlighted with a red dashed box and a red circle containing the number '6'. Below the search bar, a list of templates is displayed, each preceded by a document icon. The first item, 'Clinical Monitoring Plan Template', is highlighted in blue.

Template Name
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.



A screenshot of two buttons: 'Cancel' and 'Finish'. The 'Finish' button is highlighted with a red dashed box and a red circle containing the number '7'.



For info about filling in metadata, please see job aid:  
**Collaborate - How to Upload a Document.**