How to Create a Document from a Template

TI version 10.8

TRIAL INTERACTIVE

APPLICABLE TO:

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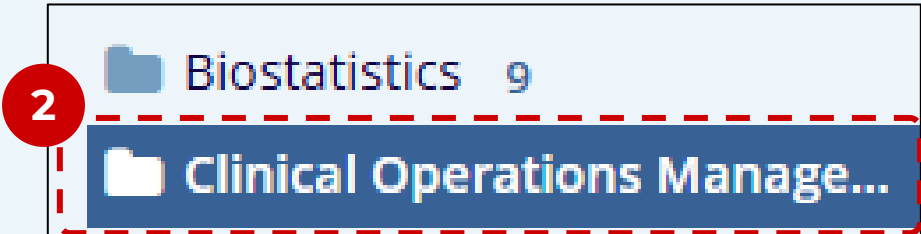
- ● Collaborate
- ● eISF

⚠️ This feature must be configured before use and therefore may not be present in all rooms. In case of doubt, ask a Room Administrator.
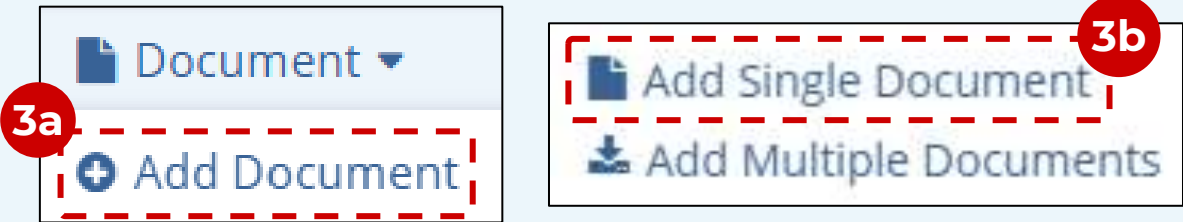
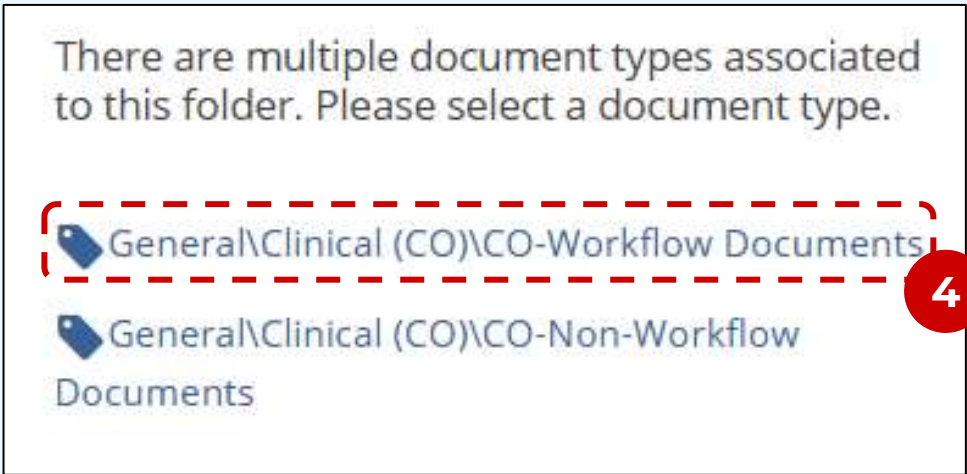**1** Navigate to the **Documents Library**.

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

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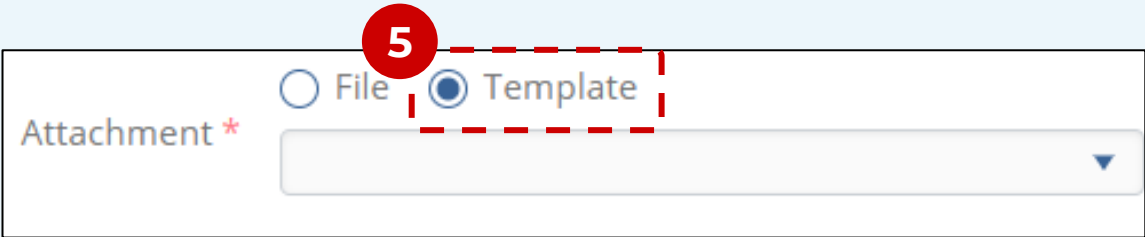(3b can be displayed by right-clicking the folder name.

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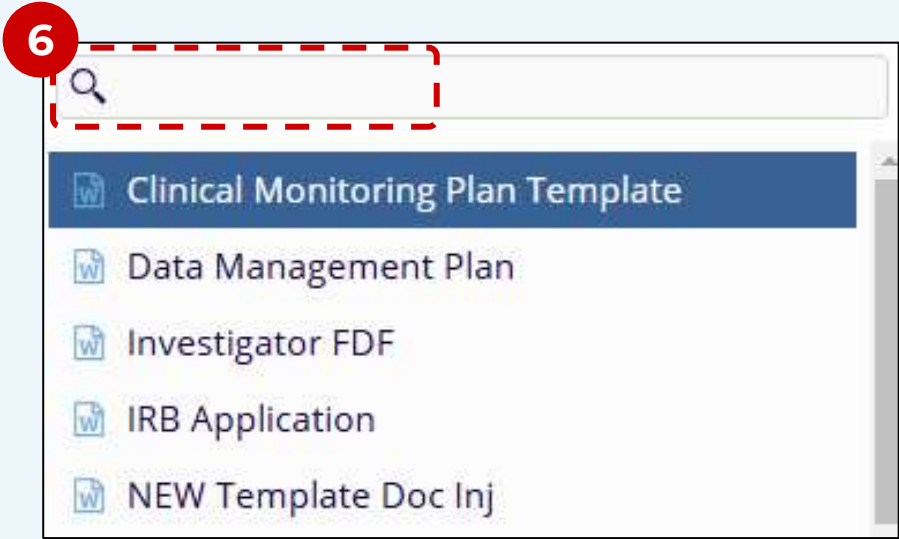
TRANSPERFECT
LIFE SCIENCES

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

Attachment *   ○ File ● Template

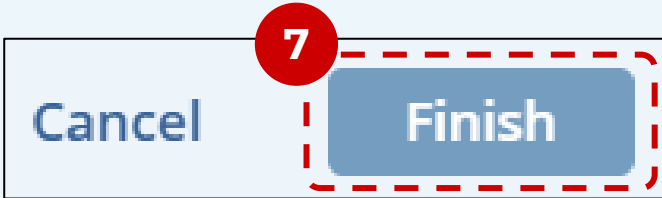**6** Use the **Dropdown list** to select one of the available templates. You can also <u>type</u> to narrow your results.

🔍

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