

Create and Update Document Templates

Templates are created from files on your file system, although they can be edited within the eTMF after creation. To start the creation process, locate a file you want to use as a template on the file system. To create a new Document Template in eTMF, select the Actions Menu on the Document Templates List Page and select **Create New Template**.

Steps for Creating a New Document Template

Begin by entering a Name for your new Template.

Select a language for the Template by selecting the dropdown arrow on the right side of the Language field.

Optional: Enter any Notes on Usage that may be helpful to the user.

If the Template will apply to all Document Types, Select **Yes** under Applies to All Types.

If the Template will not apply to all Document Types, Select **No** under Applies to All Types and click **Select Document Types**. This will display the [Select Document Types](#) window. In this window, select one or more document types for which the template should be available.

Finally, select Browse under Template File to choose the Template. Once the Template has been picked and the information in all of the previous fields is correct, select **Create**. The new Template will now display in the [Templates List](#).