

SOLABS QM10: Creating an Auto-Populate Document

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Introduction:

This document covers the process for creating an Auto-Populated Document in SOLABS QM10.

Pre-requisites and Limitations

Pre-requisites

- 1) A version of Microsoft Word 2007, 2010, 2013, 2016 or later must be available.
- 2) Super users must have an extensive knowledge of Microsoft Word functionalities to be autonomous for the setup of the Word document.
- 3) In the SOLABS QM10 application, user must have at least Modify permissions to the related documents and permissions to access the related Process step.

Limitations

Here is a list of the current limitations for the Auto-Populate Document feature

- 1) Values from an auto-incremented or parallel step are not supported and cannot be auto-populated.
 For example, values that are part of a step called **Due Date Extension Request (x)** or **Due Date Extension Approval_n**, where x and n are integers, won't be supported by this feature.
- 2) Values cannot be populated if the Content Control field is in a table.

Definition of field types

Here is the list of supported Content Control fields by the Auto-populate feature.

Content Control field	Characteristics
Rich Text / Plain Text	Allows to display text.
Date Picker	Allows to display date in different date formats.

Creation of an Auto-Populated Document

Creation of a Template Letter in Microsoft Word

Note: System requirements for Word Office can be found on Microsoft website.




Create a word document with the default extension (.docx).


You will then need to enable the Developer ribbon. To do so, go in

- **File > Options.**
- The *Word Options* dialogue box will appear.
- Select the **Customize Ribbon** on the left menu.
- In the right pane, select **Main Tabs** under *Customize the Ribbon*.
- Check the box for **Developer**.
- Click **OK**.
- The **Developer** Ribbon is displayed at the top of the page interface.



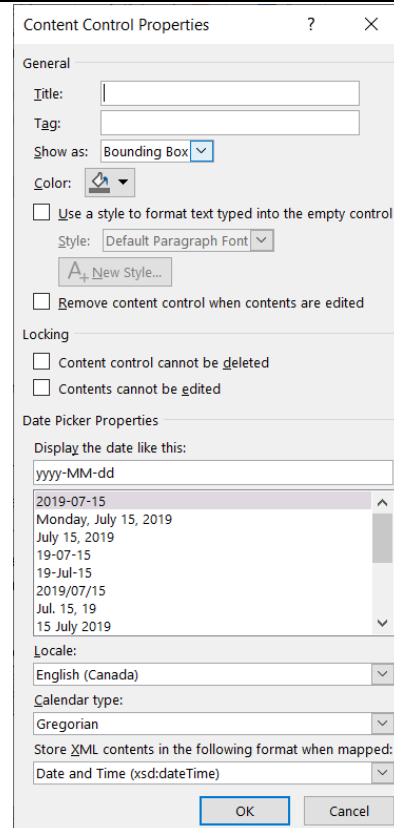
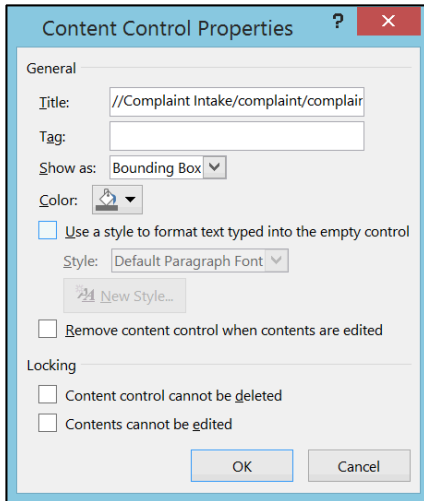
Once the letter is written as desired, you can add the Content Control fields where you will want to have the different process value variables to be populated.

- Put your cursor where you want the Content Control field to be inserted.
- Under the **Developer** ribbon, in the **Controls** group,
 - select **Rich Text Content Control** ;
 - select **Plain Text Content Control** ;
 - select **Date Picker Content Control** ;

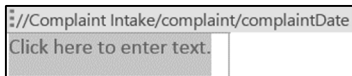
- While cursor is in the Content Control, select **Control Properties**  (under **Developer > Controls**).
 - In the Content Control Properties, next to the **Title**, enter the path of the desired variable.
- (The mapping between the process field and the path must be provided by SOLABS.)
- For **Date Picker Content Control**, you can also select the desired date format.

Rich/Plain Text Content Control

Date Picker Content Control



- Click **OK**.
- The Content Control should look like this.



Creation of a Document Type for the Auto-Populated Document in SOLABS

Create a Document Type that will be used for the Auto-Populated Document, if it does not already exist. For further information on how to create a document type in SOLABS QM10, please refer to the SOLABS Knowledge Base, [SOLABS QM10: Guide for Document Administrators](#).

Creation of an Auto-Populate Document Template in SOLABS

Create a document in SOLABS (for complete instructions, refer to the SOLABS Knowledge Base, [SOLABS QM10: Creating a Document](#)). To use this document as an Auto-Populate Template for Processes, check the box for the option *Use as template to auto-populate documents* at the bottom of the form. This option will allow this document to be used as a template for the Auto-Populate Documents from the Process page.

Then, select the Document Type desired for the Auto-Populated Documents that will be created using this Template (Document Type created in previous step).

Once the Document is created, approve it and make it effective. Only *Approved & Effective* documents can be used as an Auto-Populate Document Template.

Creation of an Auto-Populate Document

Start the process related to the previously created letter. Complete all the fields that are required and used in the letter.

From the Process View page create the Auto-Populate Document based on the template.

- On the right-side menu *Related Items*, select *Auto-Populate Documents*.

- Select *New Document* if you want to create a new document for the auto-populate document or select *New version of an existing document* if you want to update and already existing auto-populated document.
- For *New Document*, select the document template to use and enter the desired document name. As mentioned above, the *Auto-Populate Document Template* needs to be *Approved & Effective* to be displayed in the drop-down **Available Auto Document Templates**.

Create Auto-Template Documents

Created as:

New Document

New version of an existing document

* Available Auto Document Templates:

Auto Doc Template #1 (1.0) ▼

* Document Name:

Complaint 000012 Initiated for Client

Remove

+ADD

- For *New version of an existing document*, select the document you want to update.
- You can use the **+ADD** button to generate multiple documents at once. The **Remove** button can then be used to remove additional occurrences of the **Create Auto-Template Documents** group.
- Submit and Confirm.