

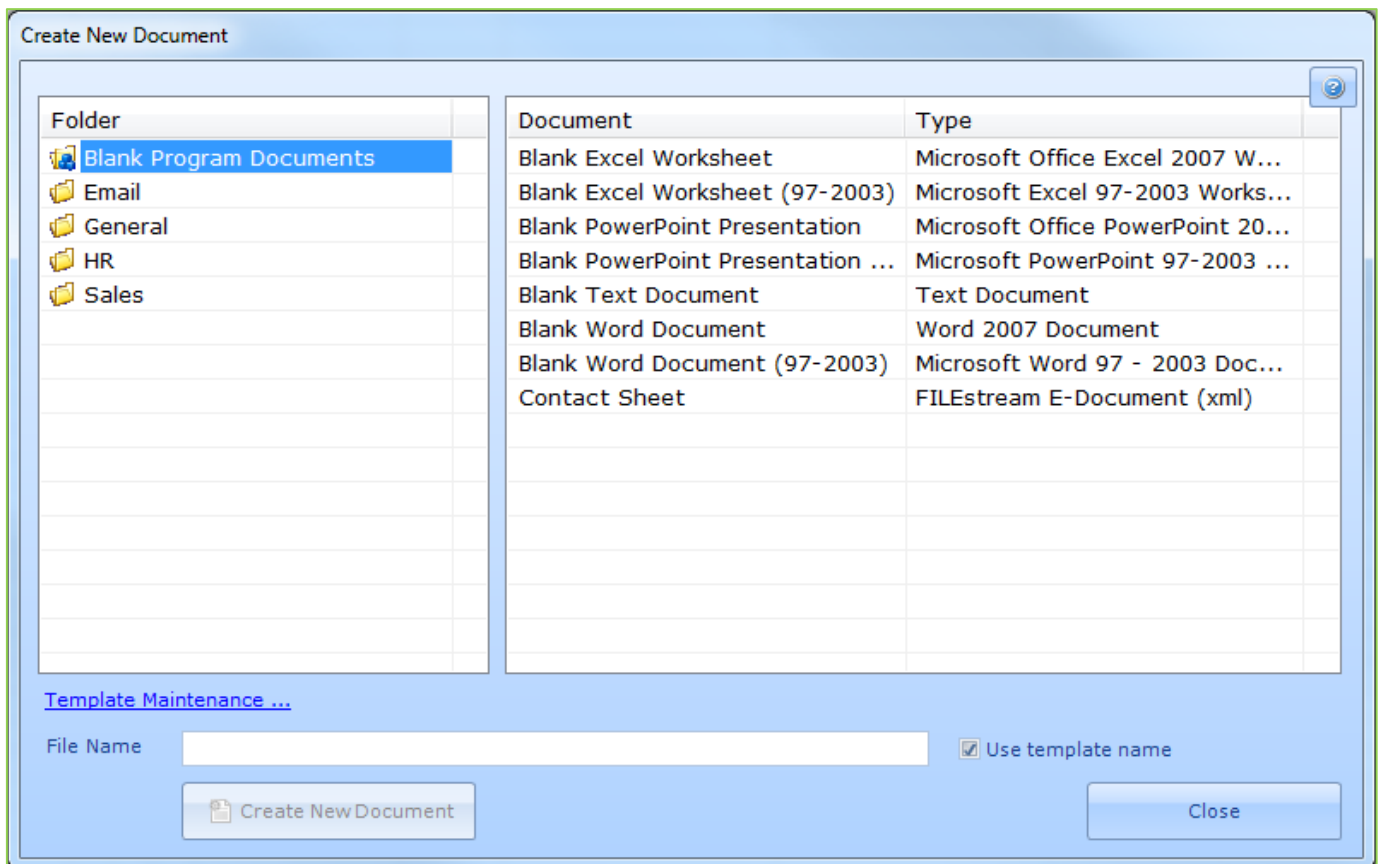
File Stream Document Templates

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More and more of our customers are using File Stream not just for storing scanned paper documents but as a full document archive for all incoming and outgoing correspondence. Most companies have documents that they use repeatedly by simply changing some key information fields, leaving the main body of text largely unaltered.

It is very simple to add these documents to File Stream. The process is as follows:

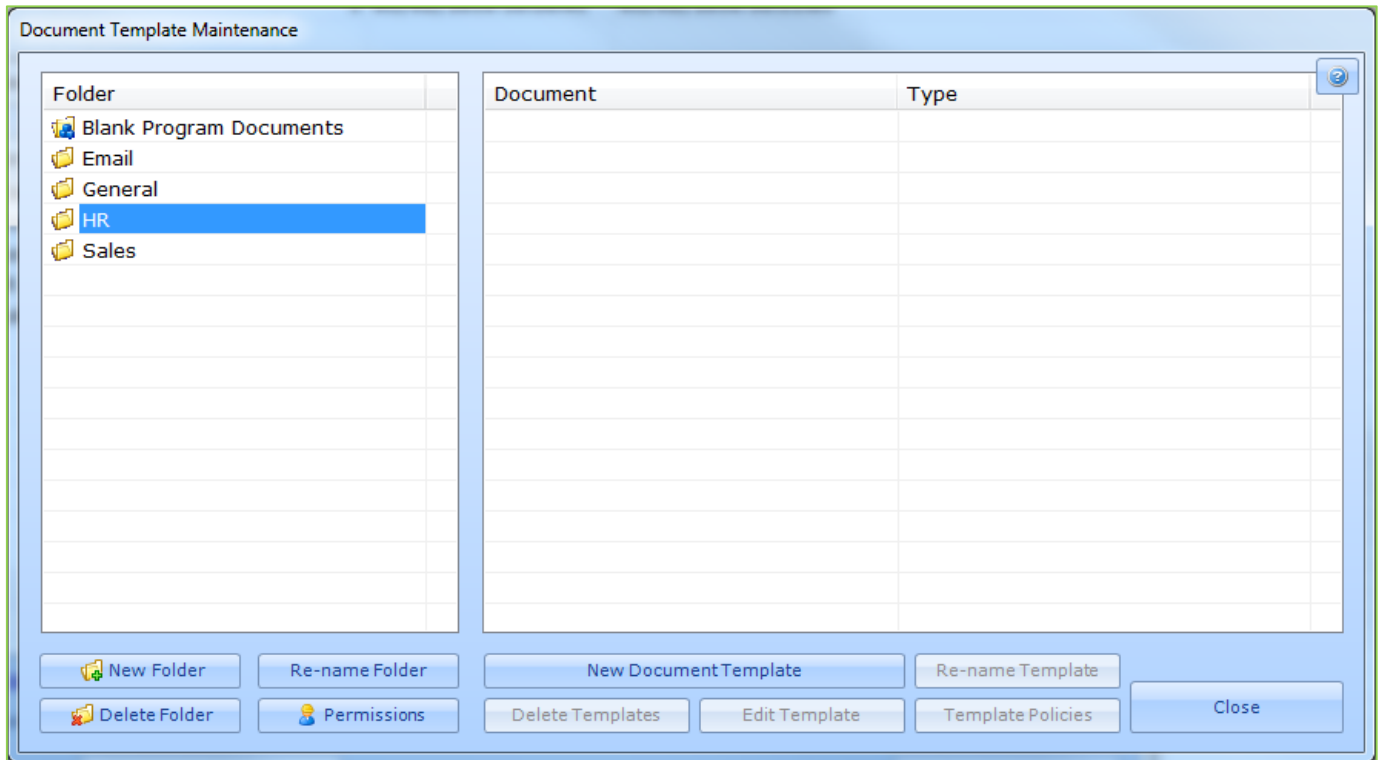
- From an In-tray, select the 'Create New Document' option from the 'Right Click' dropdown menu. A new window opens



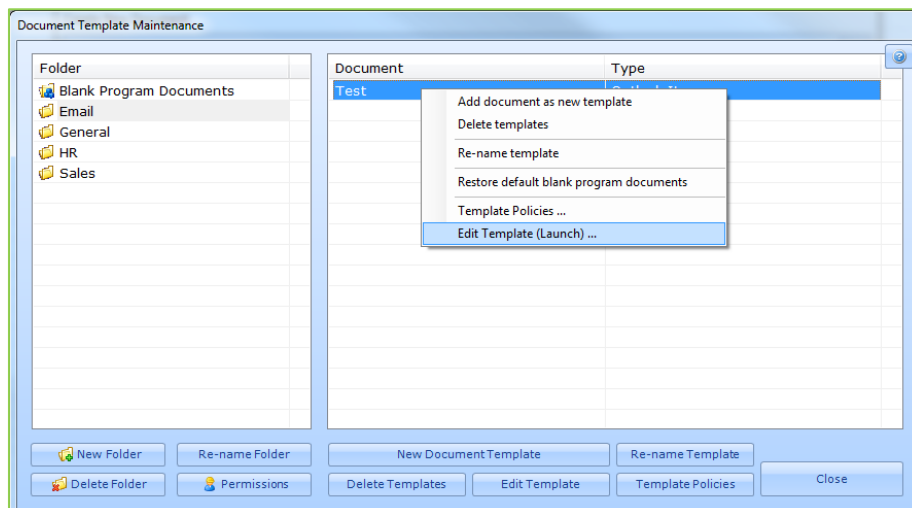
- You will see that the system already has a folder containing Blank Program documents such as blank word and excel documents
- If required, you can create folders for each department so they can store only those documents relevant to them
- To create new template folders and to edit the document templates, select the 'Template Maintenance ...' option

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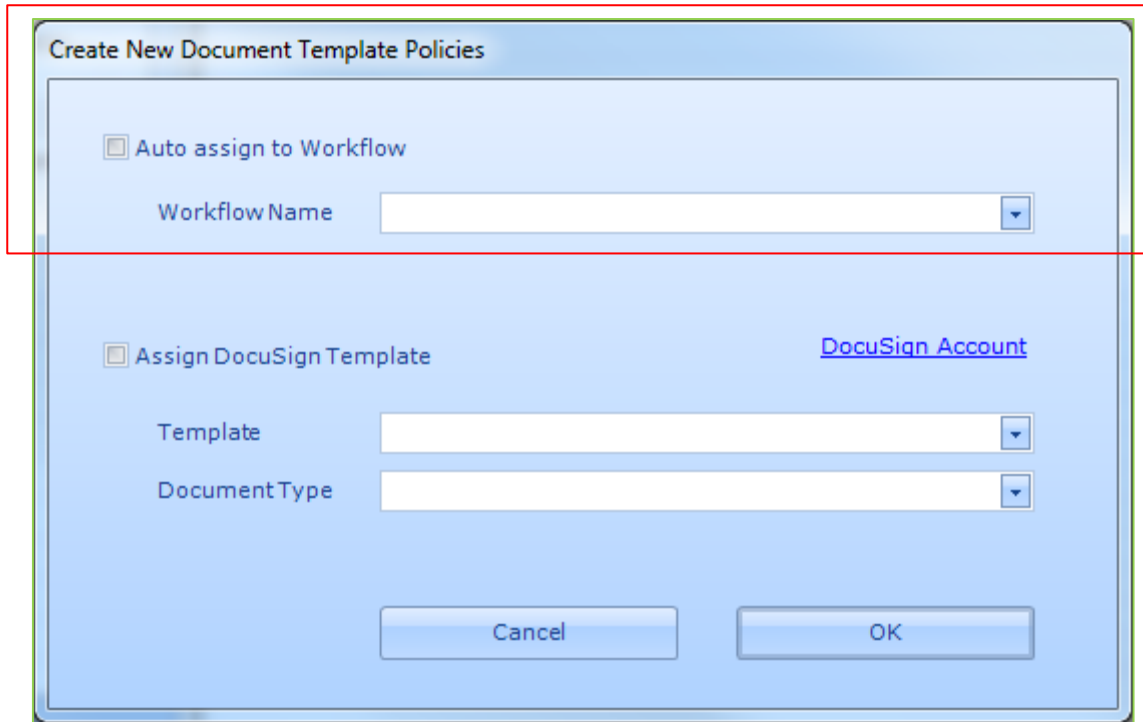
- To add standard documents already outside the system, simply highlight the relevant folder and then browse to the document by selecting the 'New Document Template' button. The document will now appear in FS and be available for use when you use the 'Create New Document' option
- You can remove the template by highlighting it and selecting the 'Remove Template' button
- It is also possible to edit template documents from within the system. Highlight the relevant document within Template Maintenance and access the 'Right Click' menu. Select the 'Edit Template (launch)' option. The document will now open in its own program ready for changes to be made. Save and close and the updated document will be available in FS



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- For File Stream customers using our workflow module it is possible to automatically assign a document when it is created into a specified workflow. To do this highlight the relevant document and press the 'Template Policies' button. This opens a new window allowing you to select which workflow you want the document to be assigned to.



Create New Document Template Policies

Auto assign to Workflow

Workflow Name

Assign DocuSign Template [DocuSign Account](#)

Template

Document Type

Cancel OK

- Templates are also tied to the [DocuSign](#) module. When selecting the Template Policies option, you may get asked to sign into DocuSign, if you do not have a DocuSign account you can press the Cancel button and proceed to the Workflow options.