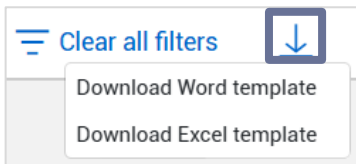


◆ GETTING STARTED

- Create a Change Writer template to generate customized change documents related to PCOs, CCOs, Issues.
- Use when you need a reusable Word or Excel template with auto-filled project data.

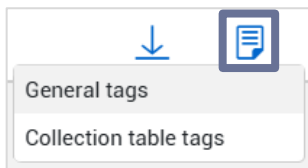
◆ DOWNLOAD A SAMPLE TEMPLATE

1. Navigate to **Organization Settings > Change templates > Templates** subtab.
2. Click **Download sample template** on the toolbar and select **Download Word template** or **Download Excel template**.

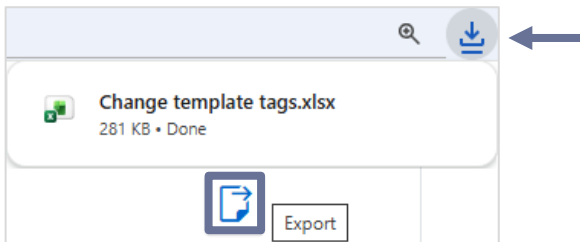


◆ DOWNLOAD AND REVIEW TAGS

1. Click **View available tags** on the toolbar and select **General tags** or **Collection table tags**.



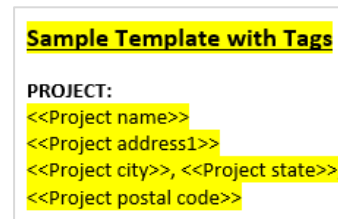
2. **Export** the tags to Excel (optional).



3. Review **the Instructions tab** in the Excel file for tag usage guidance.

◆ BUILD A CUSTOM TEMPLATE

1. Open the downloaded sample or create a new Word/Excel document.



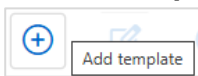
2. **Copy required tags** into the document header, body, or footer.
3. Insert tags exactly as shown in the Tag Name column in the exported Excel sheet.

1	Tag name
2	<<Project ID>>
3	<<Project name>>
4	<<Project image>>
5	<<Project address1>>
6	<<Project address2>>

4. Save the template file.

◆ UPLOAD THE TEMPLATE

1. Return to the Change template register – **Organization Settings > Change Templates > Templates** subtab.
2. Click **Add template** on the toolbar.



3. Enter **template details**.

Details Draft

*Template name Template type

Issue

*Description Template language

1000 English - EN

4. (Optional) Add **Attributes** for filtering templates by market.

Attributes

Market

Select one

[+ Add Market](#)

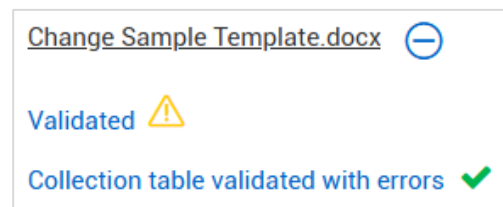
5. Under Template file, click **Add template file**.


Template file

No template file attached 

◆ VALIDATE THE TEMPLATE

- Once the file has been uploaded, the system will validate it.



-  indicates that there are errors. Click it to view the errors.

◆ SAVE AND PUBLISH

- Once you have validated and fixed any errors, click **Save and publish**.

Save and publish

◆ PREVIEW

- Click **Preview with sample data** to further validate output.

Preview with sample data

NEED SOME MORE HELP?



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