GENERATE DOCUMENTS

InEight® CONTRACT
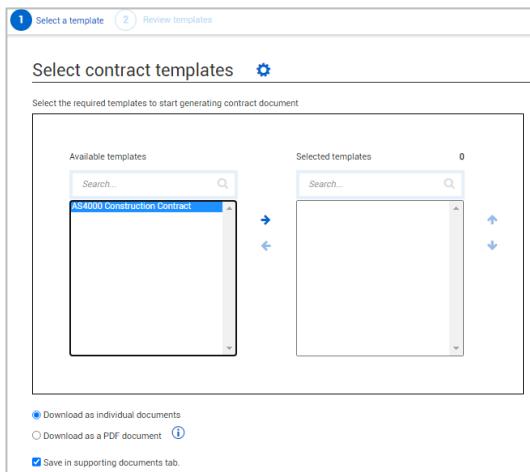
GENERATE DOCUMENT

1. Once you have completed the Contract Header and Line items you may wish to generate documents such as Contract, PO Requests. Select the **Actions** menu then **Generate Contract Document, Contract**


2. Select the appropriate Template(s) from the left and use the arrow to add to the Right column.

3. If required select the Download as PDF Document or Download as Individual Documents

4. Select if the generated document should save within the Supporting Documents

NOTE: Templates can be configured from either an Organizational Level or a Project Level by a suitable administrator.

REVIEW TEMPLATE

1. You can review the information to be added to the template.
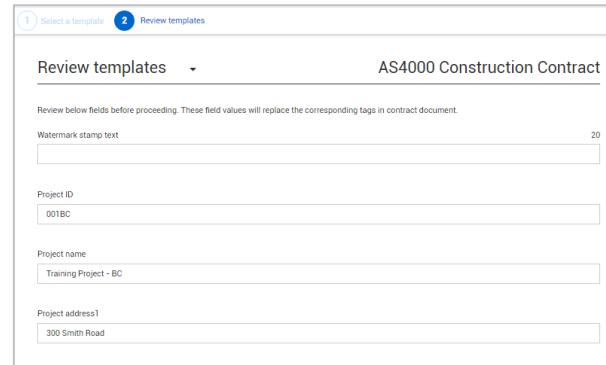

NOTE: It is not recommended in altering any of the data contained in the review screen except if you are using the "Blank" fields. These specific fields are designed to capture information you wish to appear on the generated document but not capture within the Contract information.

2. Press **Finish** and the document will be created, saved (if selected) and opened on the screen (or downloaded depending on security settings) for your review.
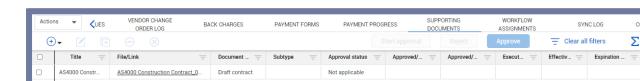
GENERATED DOCUMENT

1. The document will be created and fields from the template updated with information related to the selected contract.
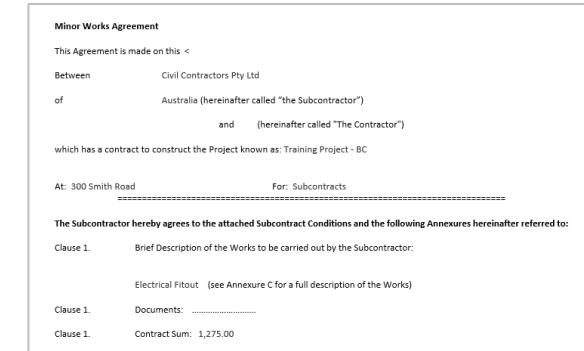
SUPPORTING DOCUMENTS

1. If selected when generating the document, a saved copy of the generated document will now be available on the Supporting Documents Tab

NOTE: Supporting Documents will be included as reference material for Workflow approvals. Should you wish to send this document externally through InEight Document you will need to add it as a Document to that register