Document Outline Templates

Last Modified on 05/14/2018 4:57 pm EDT

Document Outline Templates

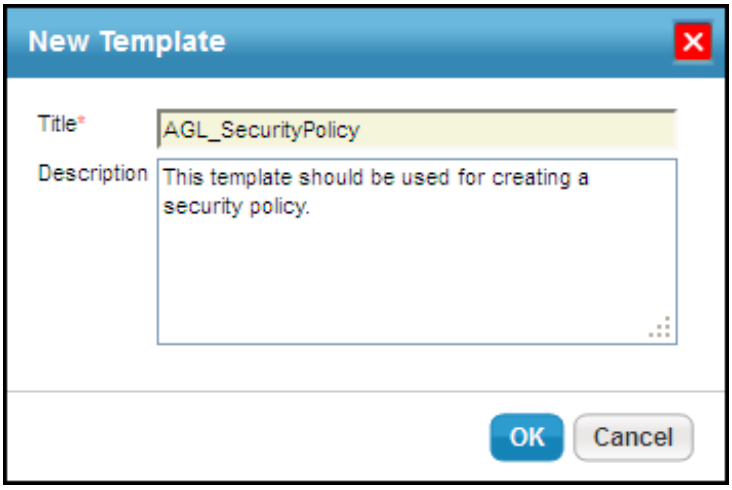
Document Outline Templates specify fonts, colors, backgrounds and other formatting styles. Document Outline Templates allow you to change the look of an existing policy or contract easily.

You can save your policy or contract as a Document Outline Template for later reuse. Because each section and subsection can be created using a template, you can build complex documents by embedding templates. Document Outline Templates are divided, by default, into {policy or contract}, Section, and Subsection groups. In order to create a custom document outline template, you need to have the Policy View and Policy Author permissions.

To create a document outline template:

1. Go to **Content** > **Policies**.
2. In the **Organization Content** tree, select the **Document Outline Templates** group, or expand and select the **Section** or **Subsection** group in which a template is to be created, and then click **New** in that group details page.

3. The **New Template** dialog appears. Enter Title and Description,



4. Click **OK** to exit the dialog and to create a new template. The template is created with default headings and with no styles and formatting.