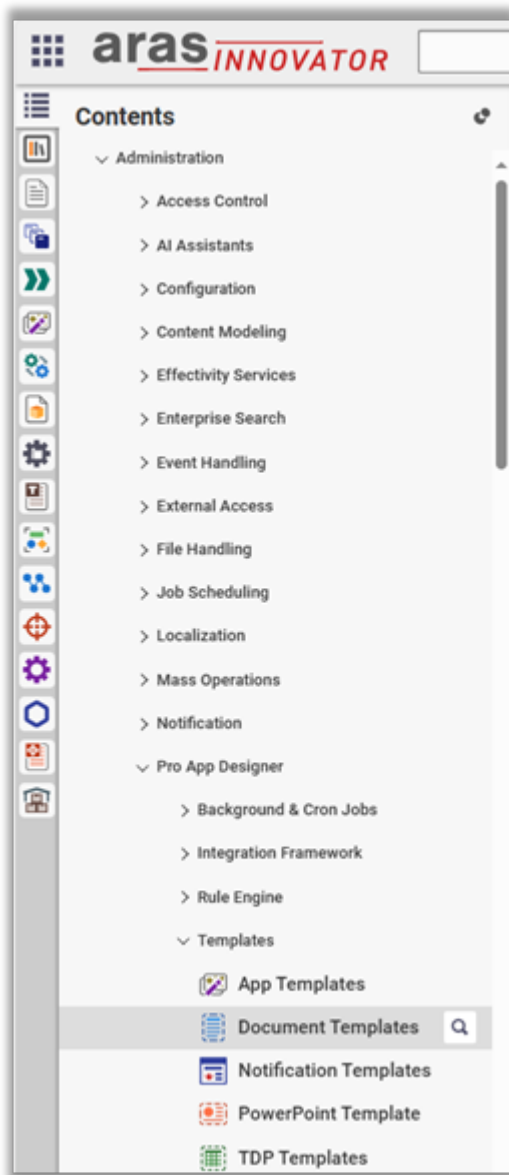


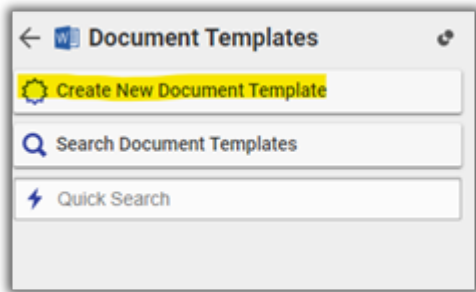
# Document Generator Template Configurations

1. Go to TOC → Administration → Pro App Designer → Templates → Document Templates.

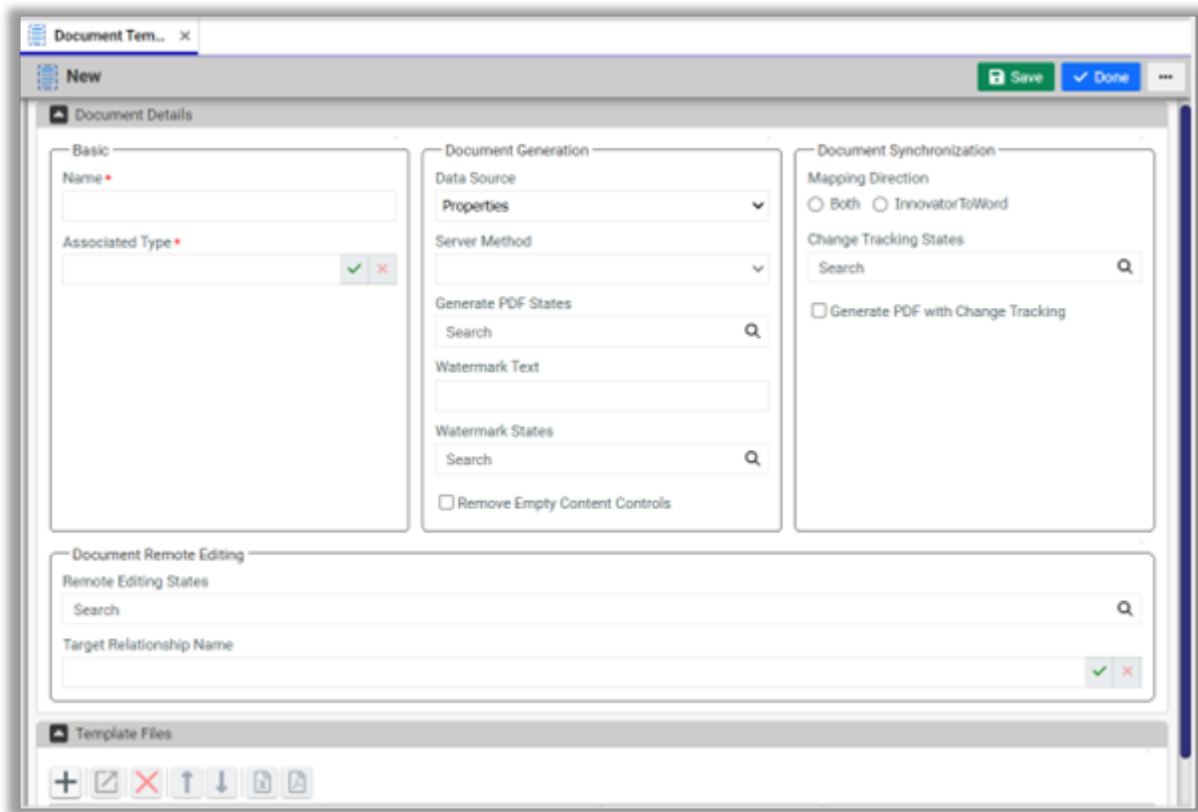


2. Click on Create New Document template.





3. Enter the necessary information, save your work, and add the template file accordingly.



Following are the details for Document Template properties:

**Basic:**

- **Name:** Template Name is a required property used to identify the document template. A valid name must be provided in order to save the template.
- **Associated Item:** Context Item specifies the ItemType for which the document template is being created. This is a required property and must be defined in order to save the template.



## Document Generation:

- **Data Source:** Supported values are 'Properties' (selected by default, Content variables are mapped using the properties of the selected ItemType), 'Server Method' (Content variables are mapped using the output of a specified server method).
- **Server Method:** Server Method Selection option becomes available when 'Server Method' is chosen as the data source for content mapping. All server methods attached as Server Events to the associated ItemType will be listed for selection. The selected method will be used to map content variables within the document template.
- **Generate PDF States:** States list for which PDF will be generated.
- **Watermark States:** Specifies the list of states for which watermarks should be applied when generating PDF documents.
- **Watermark Text:** Text to be used for watermarking. This attribute is applicable only if the watermark States attribute is defined.
- **Remove Empty Content Control:** Determines whether empty content controls should be removed from the generated PDF document.

## Document Synchronization:

- **Mapping Direction:** Supported values are 'Both' (Content variables will be mapped from Innovator to Word and Vice versa), 'InnovatorToWord' (Content variables mapping will be only from Innovator to Word)
- **Change Tracking States:** States list for which mapping will be done after changes.
- **Generate PDF with Change Tracking:** Determines whether a change-tracked PDF should be generated, based on whether any modifications have occurred.

## Document Remote Editing:

- **Remote Editing States:** States list for which remote editing is allowed.
- **Target Relationship Name:** Name of relationship where the files will attach after processing.

