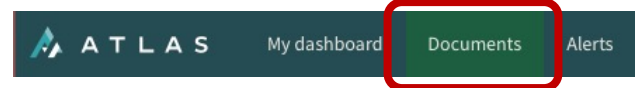




# Create | Update a document

In the top navigation, click [Documents](#), then click [Create](#).



Name your document and choose a template (see right).

The default set-up offers a few choices including:

- New Document - free-form format
- Demo Working Group Template - team charter
- Business Continuity Plan - simple template

Click [Continue](#).

**Name your document**  
Document names can be changed later.

Policy 11.1

**Choose a template**  
Templates augment your document with sample content, governance workflows, and metadata provided by your organization. Template choices cannot be changed later.

Demo Working Group Template (1 workflow)

Go Back **Continue**

For [New Document](#) simply click [Continue](#) thru the next pop-ups and at the last screen click [Finish](#).

For other templates (see right):

- Assign the reviewer(s) for each workflow step
- Click [Continue](#)
- Review the screen summary and click [Finish](#)

In addition to the new document workflow, Demo Working Group Template includes 1 workflow for later changes. Enter details for the reviews shown below now (optional), or edit later from the Manage tab.

**Material Change Workflow**

**Line of Business**

Reviewers (required)

Delegates (optional)

**Ops**

Reviewers (required)

Delegates (optional)

Go Back **Continue**

To update an existing document:

- From Documents, select the file
- Click Create version
- Name the new version and select the desired workflow
- On the Version status workflow overview screen (see right) click Edit to begin updating

**Overview**

Workflow  
Metadata  
Associations

**Version status**

Create / Edit Publish

0 of 1 draft

Advance

**Create / Edit drafts**

STATUS	NAME	LAST EDITED	ACTION
CURRENT	Version Head	26 seconds ago	Read
In progress	a draft	26 seconds ago	<b>Edit</b>

Create draft