






Quick Steps for Creating a New Document in Chronology



1. From the **Chronology** folder, access the **Action** menu.
2. Select **New Document**.
3. The **Document Setup** screen displays.
4. Click on the **Magnifying glass** icon  in the **Document template** field to search for a document template. The Template Search screen displays.
5. Enter in search parameters and select **Search**. Search results display in the Tree View and grid.
6. Highlight the desired document in the Tree View or grid and click the **Select** button. Click **Close** to close out of the Search menu.
7. Complete the required fields on the Setup tab. After the setup is complete, click on the **Document** tab. The document displays.
8. Click on the  to open the document in **Editor** for editing. Review document and complete the required fields by typing in the free text or selecting from the drop-down options.
9. Click  **Save**.
10. Click  **Close** icon or  close Windows.