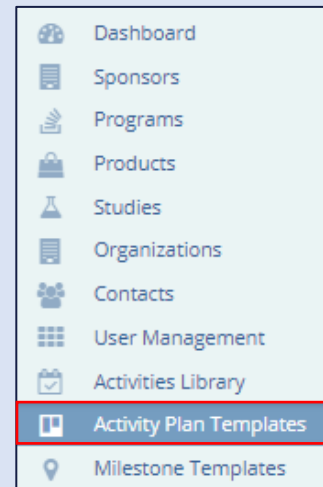


APPLICABLE TO:

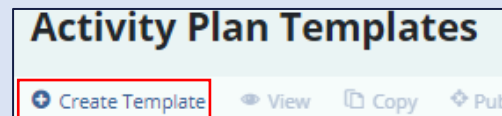
- ☒ Company Administrator
- ☒ CTMS
- ☐ Study Manager
- ☐ CRA

Note: Before attempting to create an Activity Plan Template, we recommend that any associated activities should already have been created in the activities library. For instructions on how to create an activity in the activities library, please see the associated job aid.

1. Log into the CTMS and click on **Activity Plan Templates** from the menu on the left.



2. Click **Create Template**.



Create Activity Plan Template

General Info
Associated Activities

General Info

Activity Plan Name* Level*

Training Demo Site

Classification

Select

Description

3. Enter the Activity Plan details, starting with **General Info**, followed by **Associated Activities**.

Note: Once you press '**Create, Add Activities**' the template is actually created but you will not be able to publish the template until at least one activity has been added.

Associated Activities

Q Look for: Activity for Quick Add

Create Remove

0 Activities

☐ Activity Name

Create Activity Template

Activity*

Type* Subtype

Description*

Cancel Create and Add Another Create

4. Click **Create** when finished, or click **Create and Add Another** to add an additional Activity Template.