How to Edit a Global Activity Plan Template
CTMS version 2.0
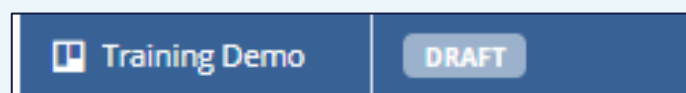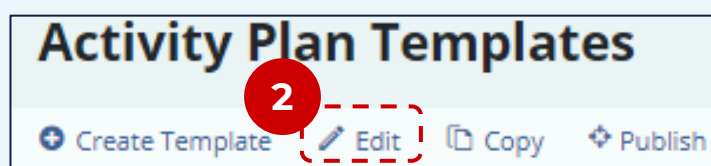
TRIAL INTERACTIVE

APPLICABLE TO:

● Company Admin
○ Study Manager
○ CRA

1 Log into the CTMS, navigate to the appropriate entity (Organization, site, etc.) and click on **Activity Plan Templates** from the menu on the left.

Dashboard
Sponsors
Programs
Products
Studies
Organizations
Contacts
User Management
Activities Library
1 Activity Plan Templates
Milestone Templates
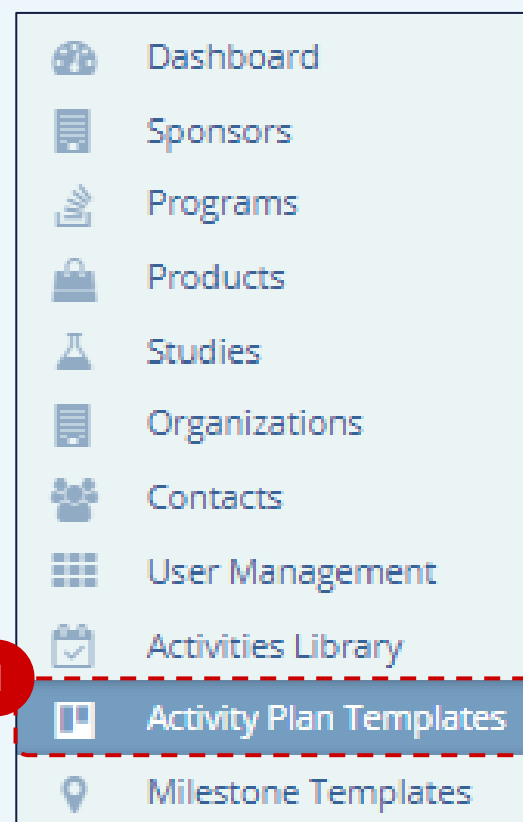
2 Select a draft Activity Plan, then click **Edit.**

Activity Plan Templates

⊕ Create Template   **2** ✎ Edit   ⧉ Copy   ⬥ Publish

🔖 Training Demo   **DRAFT**

Note: Only draft templates may be edited. Once a template is published, it will need to be retired and a new, updated copy will have to be created.

3 Make any necessary changes, then click **Save** when finished, or **Save & Next** to edit another contact.

Edit Activity Plan Template "Training Demo"

General Info

Associated Activities   1

General Info

Activity Plan Name*
Training Demo

Level*
Site

Classification
Select

Description

Select Parent Plan

1 0 Related Plans

Edit Activity Plan Template "Training Demo"

General Info

Associated Activities   1

Associated Activities

🔍 Look for Activity for Quick Add

⊕ Create   ⊗ Remove

1 Activities

	Activity Name	Type
☐	📅 Site EC Approval	Document

Save Activities

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LIFE SCIENCES