How to Publish a Checklist Template

CTMS version 2.0

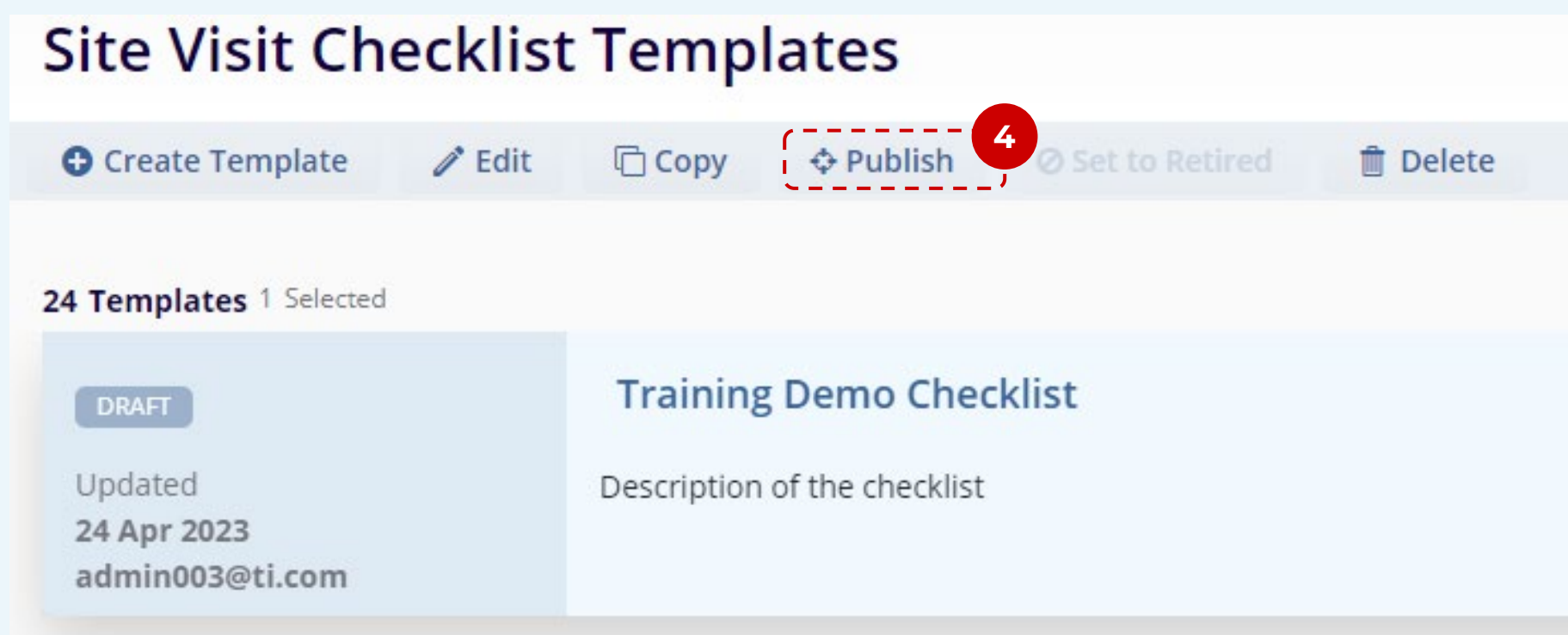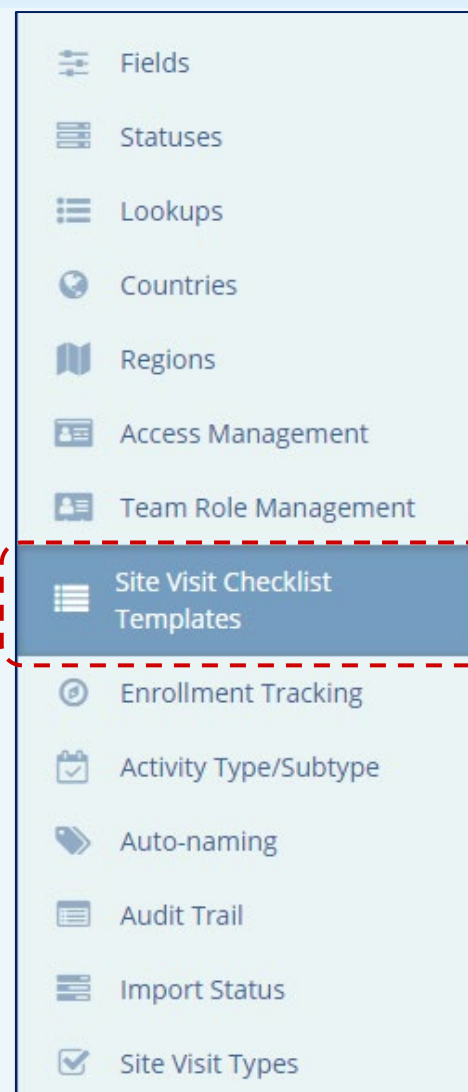**TRIAL INTERACTIVE**

APPLICABLE TO:

- ● **Company Admin**
- ○ **Study Manager**
- ○ **CRA**

1 Navigate to the Settings area.

2 Select **Site Visit Checklist Templates** from the navigation links at the left side of the screen.

⇄	Fields
▦	Statuses
☰	Lookups
🌐	Countries
📖	Regions
🪪	Access Management
🪪	Team Role Management
☰	**Site Visit Checklist Templates**
⊙	Enrollment Tracking
📅	Activity Type/Subtype
🏷	Auto-naming
▤	Audit Trail
▦	Import Status
☑	Site Visit Types

3 Select the checklist to be published from the list displayed.

4 Press the **Publish** button in the menu above the list.

Site Visit Checklist Templates

⊕ Create Template	✏ Edit	⧉ Copy	✛ Publish	⊘ Set to Retired	🗑 Delete

24 Templates 1 Selected

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Updated
24 Apr 2023
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Training Demo Checklist

Description of the checklist

TRANSPERFECT LIFE SCIENCES

5 In the popup window the opens, press the **Publish** button to confirm that you wish to publish the checklist template.

Publish Site Visit Checklist Template

Do you want to publish Site Visit Checklist Template **Training Demo Checklist** ?

5

Cancel   **Publish**