

How to Edit a Global Activity Plan Template

CTMS version 2.1

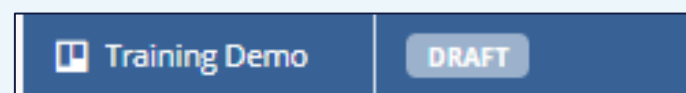
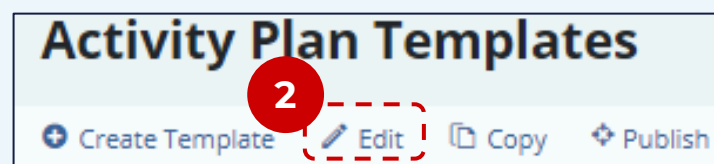
APPLICABLE TO:

- 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.



2 Select a draft Activity Plan, then click **Edit**.



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.

A screenshot of the 'Edit Activity Plan Template' form, General Info tab. The form includes fields for 'Activity Plan Name*' (Training Demo), 'Level*' (Site), 'Classification' (Select), and 'Description'. There is also a 'Select Parent Plan' toggle and a '0 Related Plans' indicator.

A screenshot of the 'Edit Activity Plan Template' form, Associated Activities tab. It shows a search bar for 'Look for Activity for Quick Add', 'Create' and 'Remove' buttons, and a table with 1 activity:

Activity Name	Type
Site EC Approval	Document

