How to Publish a Checklist Template

CTMS version 2.1

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 0 N Regions 400 Access Management Team Role Management 23 2 Site Visit Checklist Templates Enrollment Tracking 0 Activity Type/Subtype $\overline{}$ \bigcirc Auto-naming Audit Trail Import Status $\mathbf{\mathbf{V}}$ Site Visit Types

TRIAL INTERACTIVE

- 3 Select the checklist to be published from the list displayed.
- ⁴ Press the **Publish** button in the menu above the list.

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Create Template	/ Edit	Сору	Publish	📋 Delete





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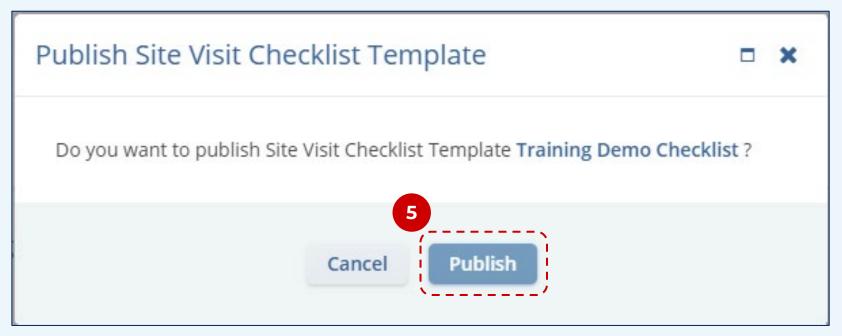
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In the popup window the opens, press the **Publish** button to confirm that you wish to publish the checklist template.





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