How to Retire a Checklist Template
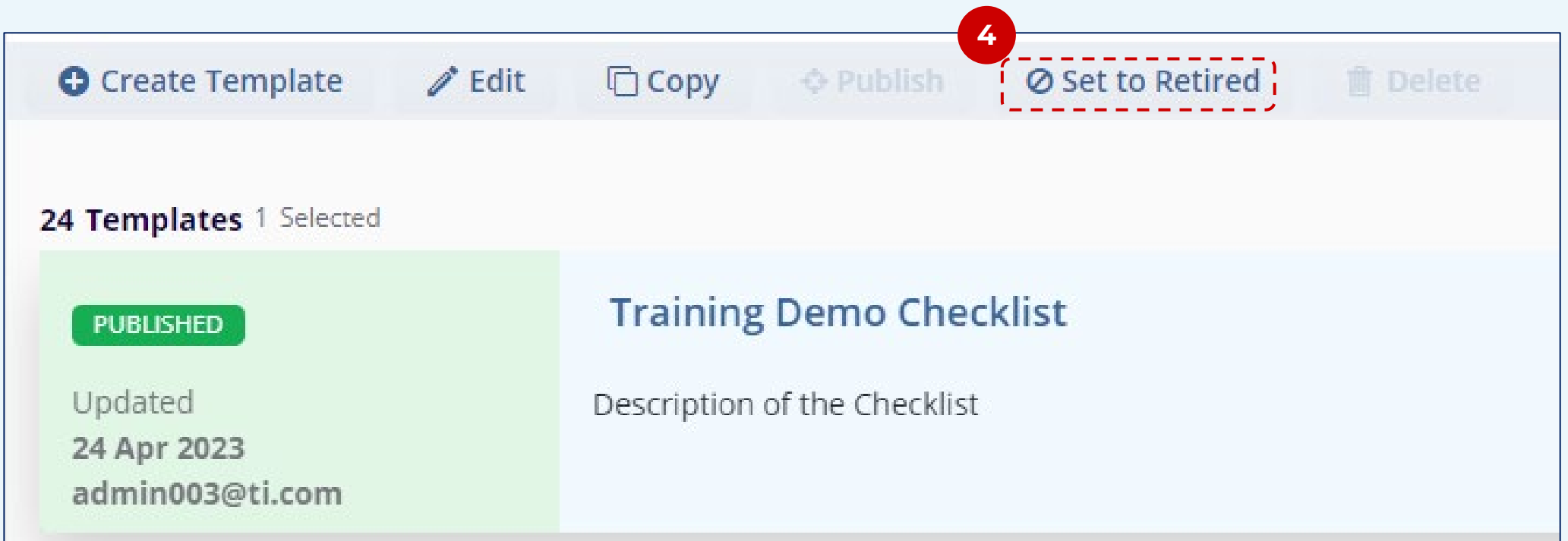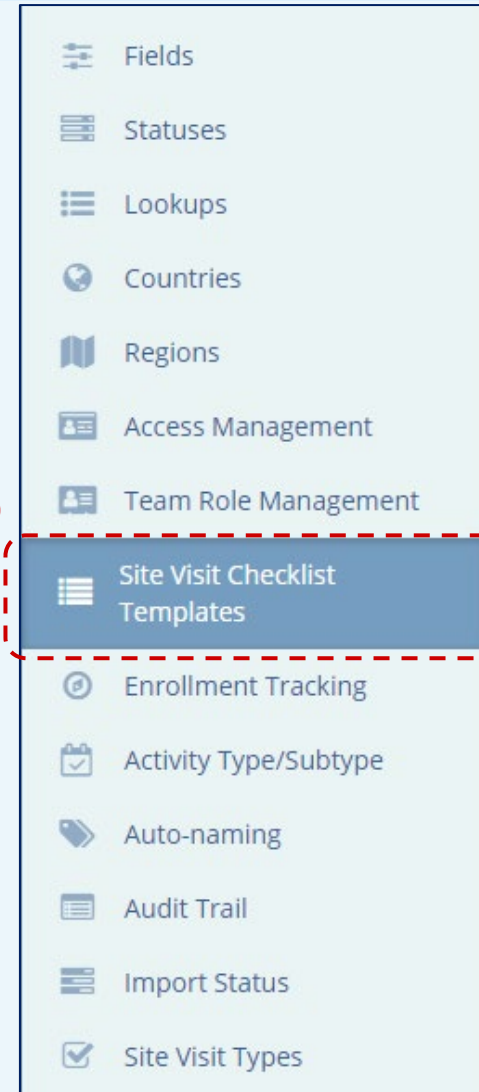
CTMS version 2.1

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.

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

4 Press the **Set to Retired** button in the menu above the list.

Fields
Statuses
Lookups
Countries
Regions
Access Management
Team Role Management
2 Site Visit Checklist Templates
Enrollment Tracking
Activity Type/Subtype
Auto-naming
Audit Trail
Import Status
Site Visit Types

4

⊕ Create Template   ✎ Edit   ▢ Copy   ⊕ Publish   ⊘ Set to Retired   🗑 Delete

24 Templates 1 Selected

PUBLISHED

Updated
24 Apr 2023
admin003@ti.com

Training Demo Checklist

Description of the Checklist

5 In the popup window the opens, press the **Set Retired** button to confirm that you wish to retire the checklist template.

Set Retired Site Visit Checklist Template

Do you want to set the following Checklist Template to Retired?

Name Training Demo Checklist

Status **PUBLISHED**

Description Description of the Checklist

5

Cancel **Set Retired**