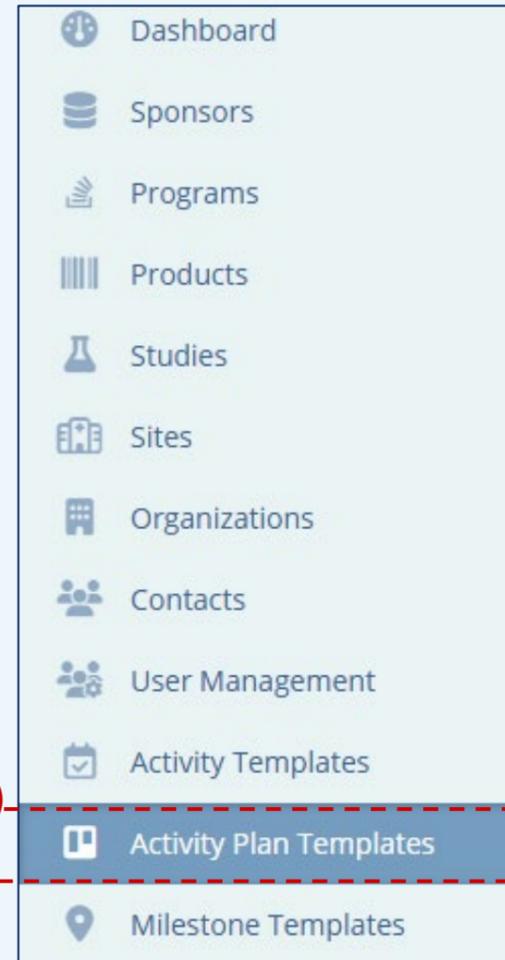


## APPLICABLE TO:

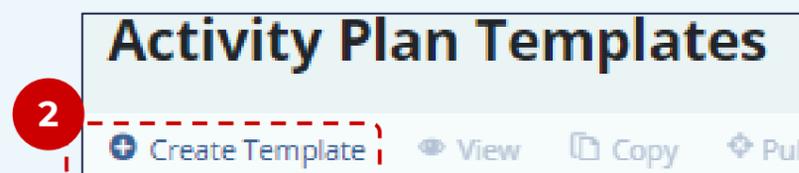
- Company Admin
- Study Manager
- CRA

**Note:** Before attempting to create an Activity Plan Template, we recommend that any associated activities should already have been created in the Activity Templates area. For instructions on how to create an activity template, please see the associated job aid.

**1** Log into the CTMS and click on **Activity Plan Templates** from the menu on the left.



**2** Click **Create Template**.



**6** Enter the Activity Plan details, starting with **General Info**, followed by **Associated Activities**.

**Note:** Once you press 'Create, Next Add Activities' the template is created, but you will not be able to publish the template until at least one activity has been added.

Create Activity Plan Template

1 General Information

2 Associated Activities

General Information

Activity Plan Name\*  Level\*

Classification

Description

Status

Select Parent Plan

Cancel Create, Next Add Activities

**7** Use either the **Create** button or the **Browse Activity Templates** button to add activities to your activity plan template. When you are done, press **Save Activities**.

Create Activity Plan Template

Step 2

1 General Information

2 Associated Activities

Associated Activities

Search Library / Quick Select

Create Remove

0 Activities

Activity Name	Type	Subtype	Description	Modified	Modifier
No records available.					

Cancel Previous Save Activities

**Note:** Your activity plan template will be created in a draft status so that additional editing can take place. Study personnel will not be able to use the activity plan template until it is published.