# How to Edit a Global Activity Plan Template
**CTMS version 3.0**
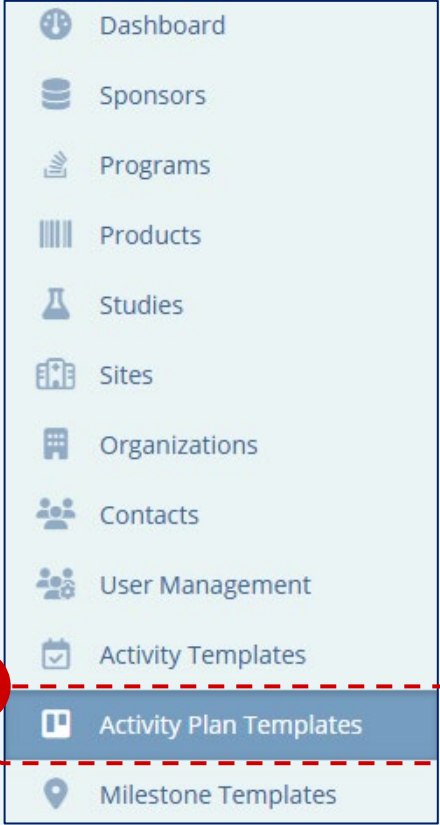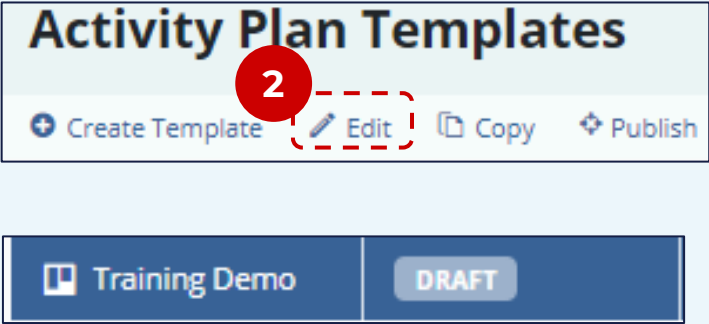
**TRIAL INTERACTIVE**

**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.

- Dashboard
- Sponsors
- Programs
- Products
- Studies
- Sites
- Organizations
- Contacts
- User Management
- Activity Templates
- **1** Activity Plan Templates
- Milestone Templates

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

### Activity Plan Templates

⊕ Create Template   **2** ✎ Edit   ⧉ Copy   ✦ Publish

🏳 Training Demo        DRAFT

**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 Activities** when finished.

Edit Activity Plan Template "Training Demo"

General Info
Associated Activities   1

General Info
Activity Plan Name*
Training Demo
Level*
Site
Classification
Select
Description
Select Parent Plan
1 0 Related Plans

Edit Activity Plan Template "Training Demo"

General Info
Associated Activities   1

Associated Activities
🔍 Look for  Activity for Quick Add
⊕ Create   ⧉ Remove
**1 Activities**

| | Activity Name | Type |
|---|---|---|
| ☐ | 📅 Site EC Approval | Document |

Save Activities