How to Create an Activity Plan Template

CTMS version 3.1
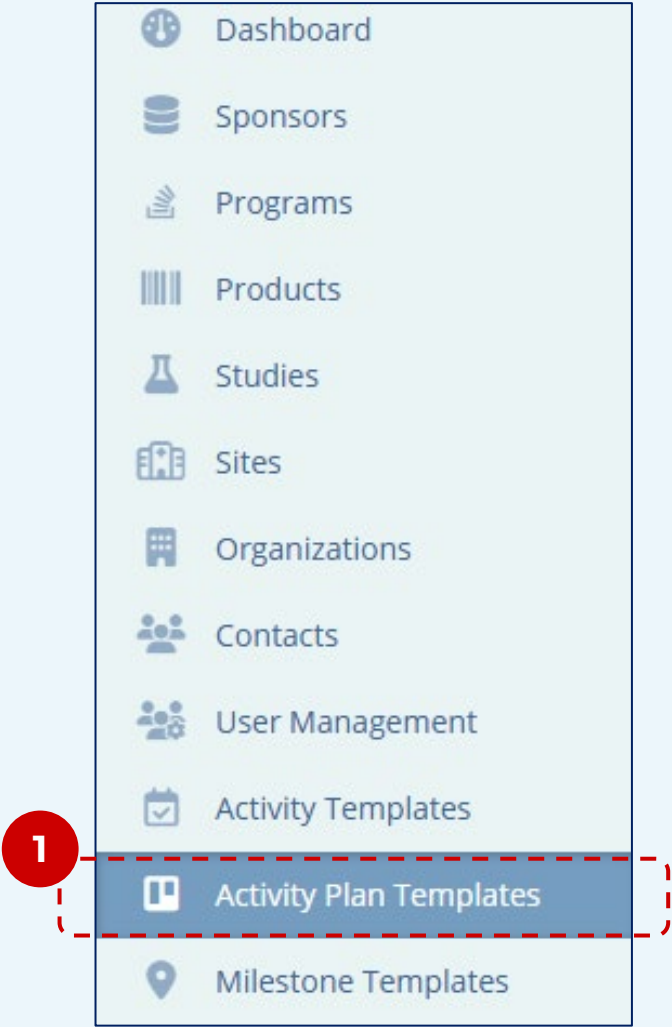
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APPLICABLE TO:

● **Company Admin**
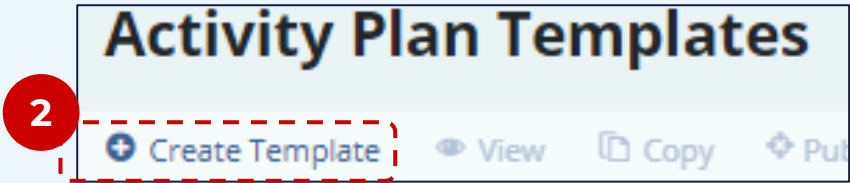○ **Study Manager**
○ **CRA**

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.

** Taking the time to create activity plan templates which align with internal SOPs and work instructions helps ensure that users performing these actions always utilize a uniform set of activities, leading to more accurate and consistent reporting. Additionally, being able to select and apply a pre-set list of activities saves users time over needing to manually create multiple tracked activities over and over again.

1 Log into the CTMS 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 Click **Create Template.**

Activity Plan Templates

2 ⊕ Create Template   👁 View   📄 Copy   ◈ Pu

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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.

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.**

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.