How to Edit a Global Activity Plan Template
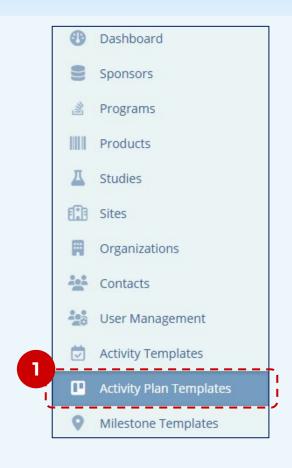**CTMS version 3.1**

TRIAL INTERACTIVE

APPLICABLE TO:
- ● Company Admin
- ○ Study Manager
- ○ CRA

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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. Should an activity template need to be replaced, any associated activity plan templates should be reviewed for necessary edits as well.

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