

How to Mass Edit Activites

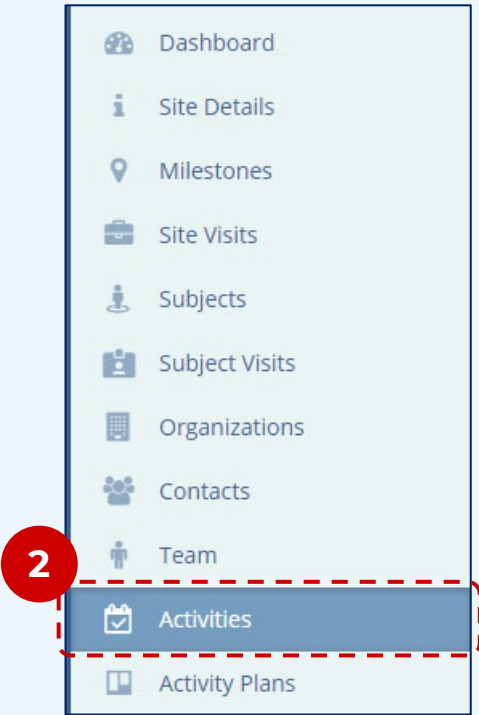
CTMS version 3.1

APPLICABLE TO:

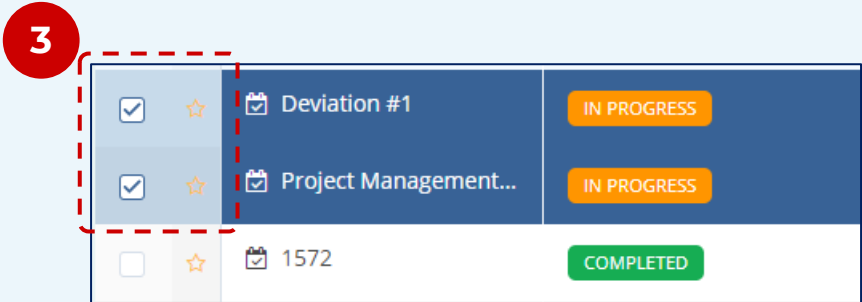
- Company Admin
- Study Manager
- CRA

1 Log in and navigate to the Study, Country, Site, or Subject whose activities need to be edited.

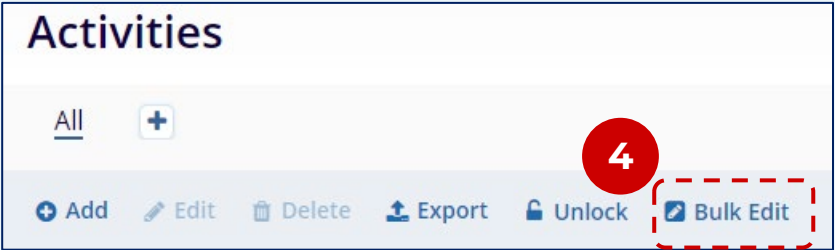
2 Select **Activities** in the navigation links at the left side of the screen.



3 Using the checkboxes, select all of the activities which you would like to edit.



4 Press **Bulk Edit** in the menu above the list of activities



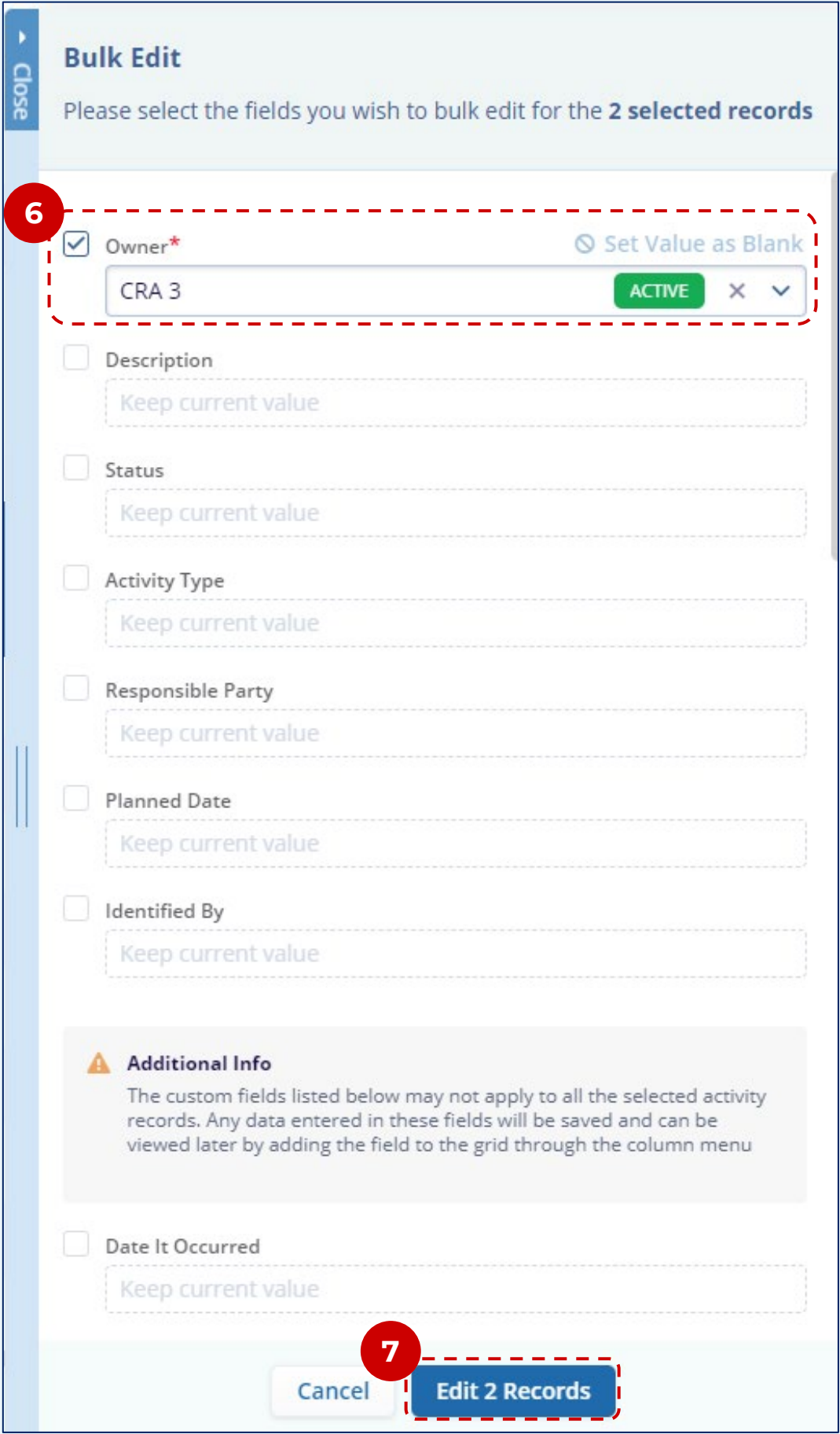
6 In the quick-view panel, select which field(s) should be updated for all of the selected activities and indicate the new value.

Note: There is a cautionary note in the panel which should be heeded.

The panel displays fields which do not necessarily apply to the selected activities. Values can be applied to these fields, but this may create extraneous and unexpected data.

Changes should be made only to fields above the “Additional Info” field.

7 When you are done, press the **Edit** button to save your changes.



Bulk Edit

Please select the fields you wish to bulk edit for the **2 selected records**

6

☒ Owner* Set Value as Blank

CRA 3 ACTIVE X ▼

☐ Description Keep current value

☐ Status Keep current value

☐ Activity Type Keep current value

☐ Responsible Party Keep current value

☐ Planned Date Keep current value

☐ Identified By Keep current value

Additional Info

The custom fields listed below may not apply to all the selected activity records. Any data entered in these fields will be saved and can be viewed later by adding the field to the grid through the column menu

☐ Date It Occurred Keep current value

7

Cancel Edit 2 Records

One of the most common uses for this function is to assist in reassigning tasks after a change in the study team. The ‘Owner’ field (indicated above) allows you to reassign the activities to a new CRA or other owner.

You may need to make other adjustment to a smaller subset of activities or to a single activity if the field to be changed is not applicable to all activities selected. When making changes, bear in mind that the information indicated will be applied to all selected activities.