

- APPLICABLE TO:
- Admin

Manager

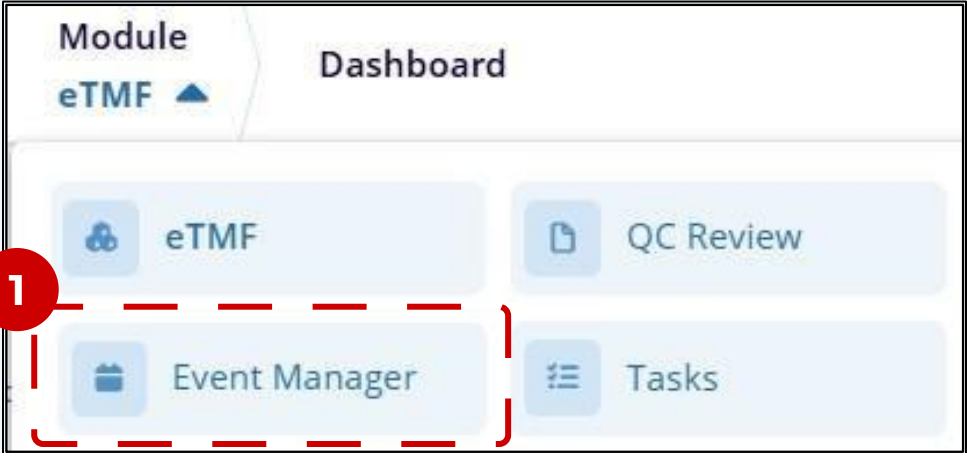
Editor

Reader

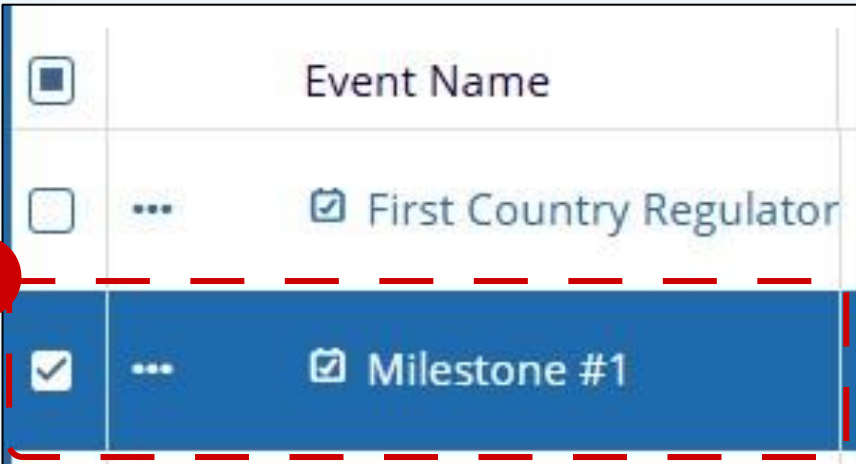
eTMF

It is possible to copy an existing Event, thereby generating a new event with the same settings and requirements. This is especially helpful for events that may repeat in an established pattern, like Site Visits.

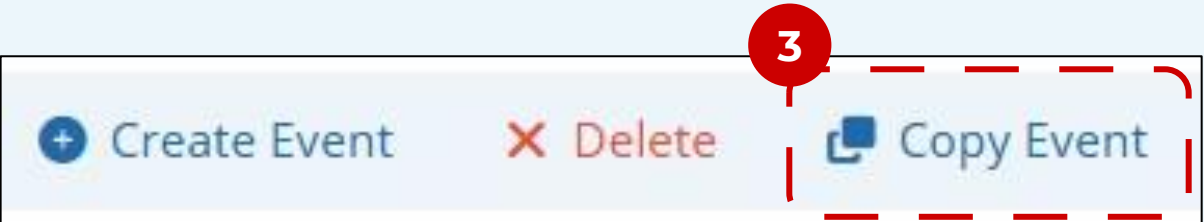
- 1
- Log into a room and select **Event Manager** with the module selector.
- Note: Event Manager must be enabled in the room, and the **Event Manager action** must be assigned to the user - unless the user is an Administrator.



- 2
- Select an event. Only one event can be copied at a time.

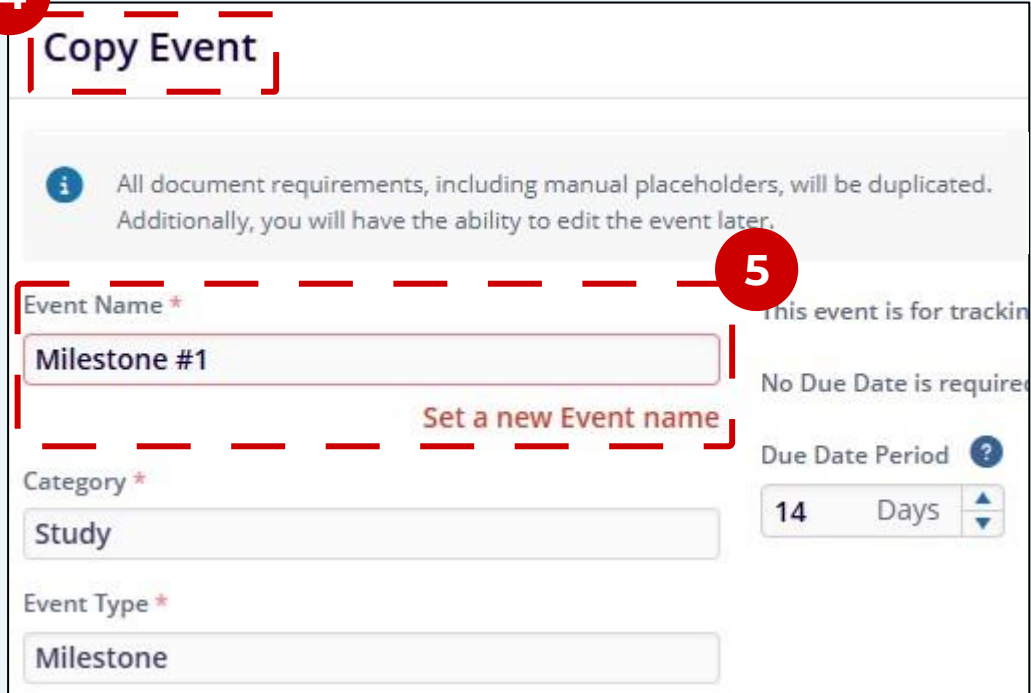


- 3
- Click the **Copy Event** button in the menu ribbon above the list of events.



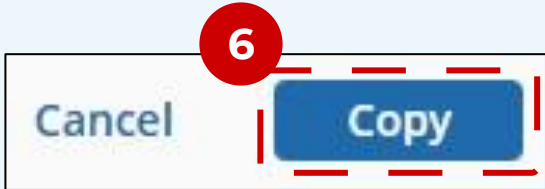
4 The Copy Event dialog opens. This is similar to the Create Event dialog. It will display the same details and information as the event you're copying.

5 Change the **Event Name** as it must be unique. You can leave all other details as they are or change them, depending on your needs.



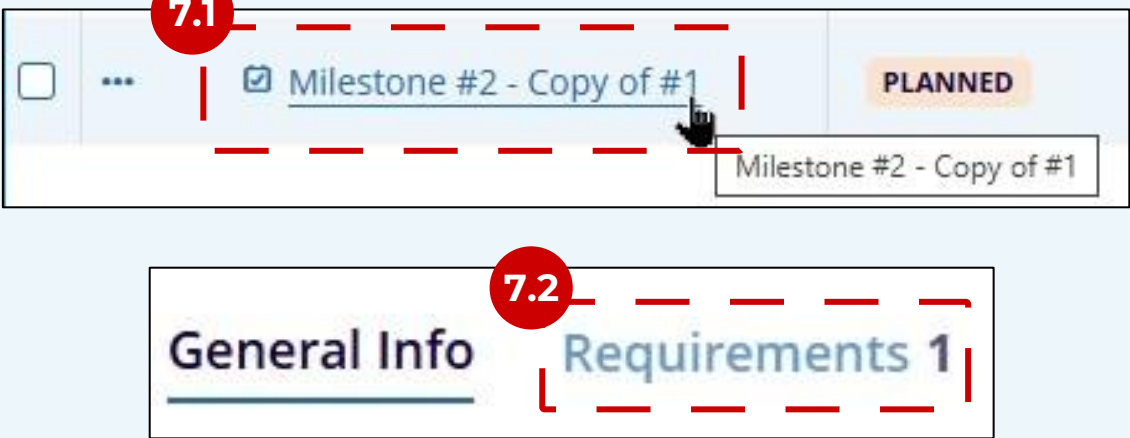
The 'Copy Event' dialog box is shown. It has a title bar 'Copy Event' with a red circle 4. Below the title bar is an information icon and text: 'All document requirements, including manual placeholders, will be duplicated. Additionally, you will have the ability to edit the event later.' Below this is a red dashed box containing the 'Event Name' field with the value 'Milestone #1' and a red circle 5. To the right of the 'Event Name' field is the text 'This event is for tracking'. Below the 'Event Name' field is a red dashed box containing the text 'Set a new Event name'. Below the 'Event Name' field is the 'Category' field with the value 'Study'. Below the 'Category' field is the 'Event Type' field with the value 'Milestone'. To the right of the 'Event Name' field is the 'Due Date Period' field with the value '14 Days' and a red circle 5.

6 Click on **Copy** at the bottom of the dialog box to finalize.
A new event with the same document requirements as the original is created. Treat this like you would any new Event.



A button labeled 'Copy' with a red circle 6 above it. To the left of the 'Copy' button is a button labeled 'Cancel'.

7 Should you need to change the requirements list for the copy Event, you can simply **enter the Event** and make any edits in the Requirements tab.



The event list shows a row with a checkbox, a three-dot menu, and the text 'Milestone #2 - Copy of #1' with a red circle 7.1. To the right of the text is a button labeled 'PLANNED'. Below the text is a tooltip showing 'Milestone #2 - Copy of #1'. Below the event list are two tabs: 'General Info' and 'Requirements 1' with a red circle 7.2 above it.