How to Copy Events

TI version 10.8

TRIAL INTERACTIVE

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.
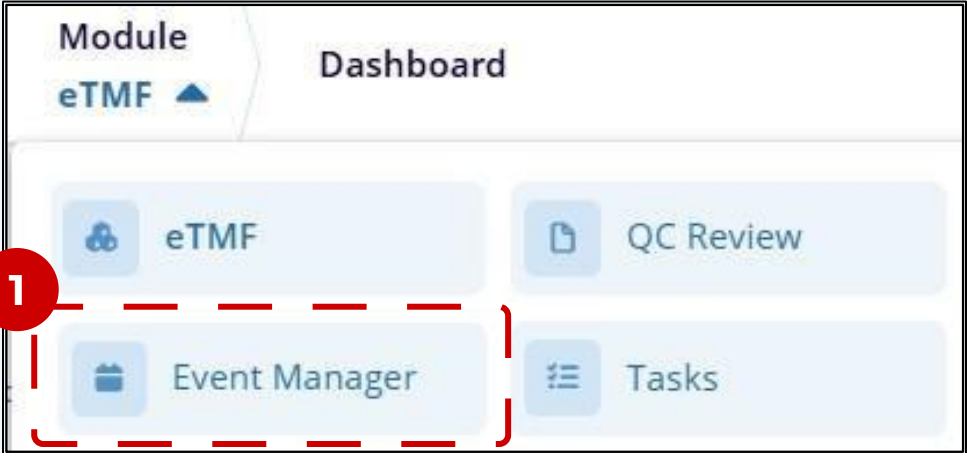
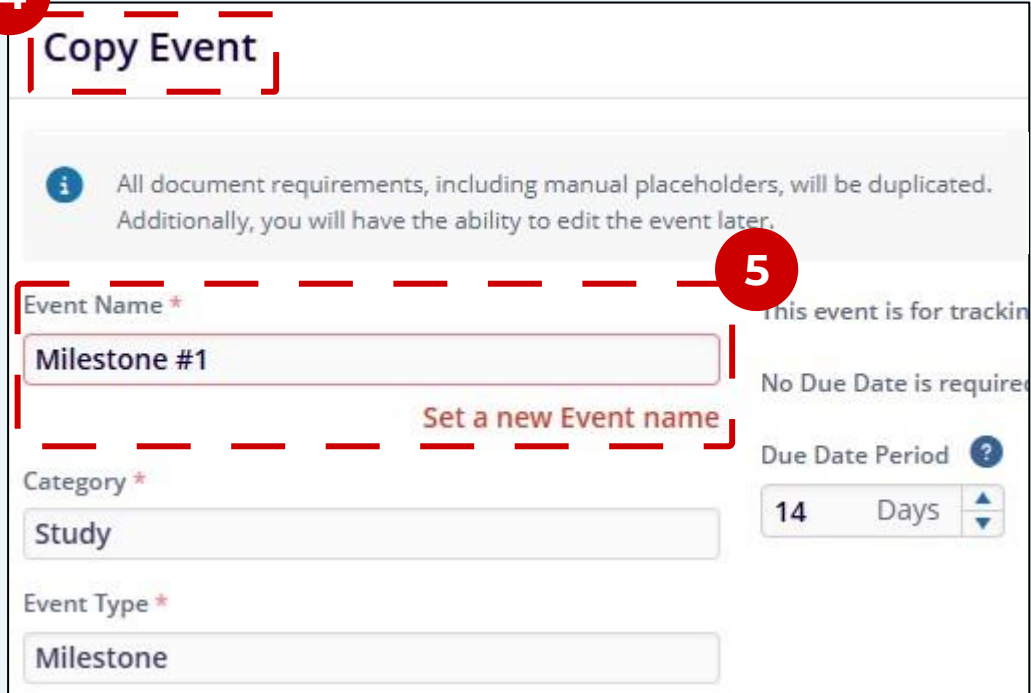**2** **Select** an event. Only one event can be copied at a time.
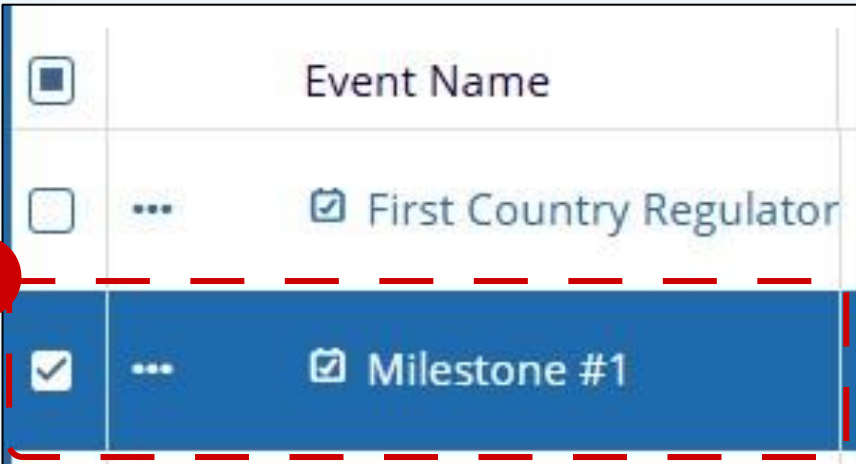
3 Click the **Copy Event** button in the menu ribbon above the list of events.

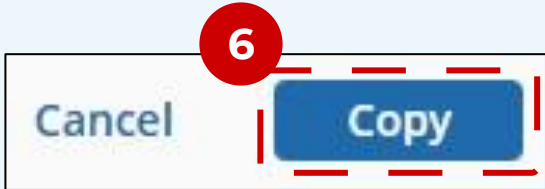**TRANSPERFECT**
LIFE SCIENCES

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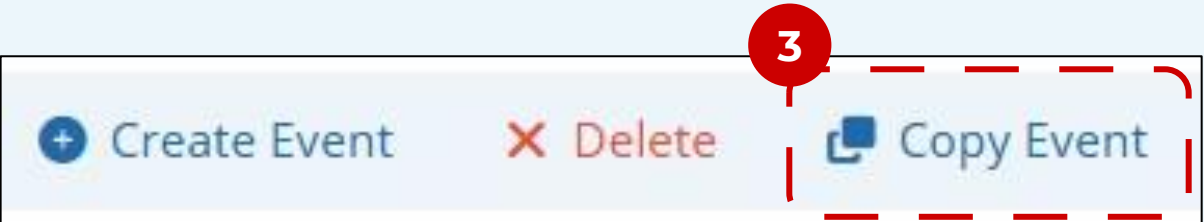
4 The Copy Event dialog opens. This is similar to the Create Event dialog. It will display the same details and information as the event you're copying.

4

Copy Event

ℹ All document requirements, including manual placeholders, will be duplicated. Additionally, you will have the ability to edit the event later.

Event Name *
Milestone #1
Set a new Event name

This event is for trackin

No Due Date is require

Due Date Period ?
14   Days

Category *
Study

Event Type *
Milestone

5

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.

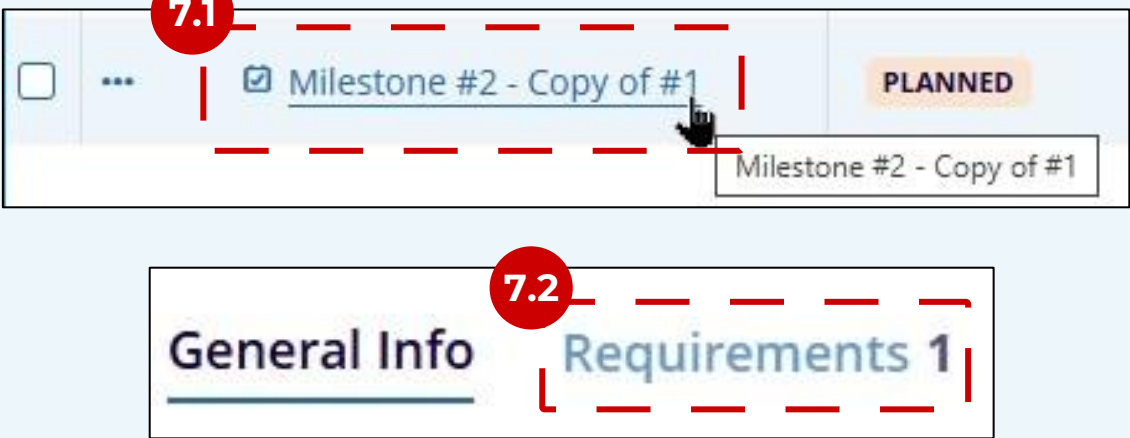**6** Click on **Copy** at the bottom of the dialog box to finalize.
A new event with the same document requirements as the original is created. Treat this like you would any new Event.

6

Cancel   Copy

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.

7.1

☐ ...   ☑ Milestone #2 - Copy of #1   **PLANNED**

Milestone #2 - Copy of #1

7.2

General Info   Requirements **1**