

# How to Add an Event

TI version 10.7

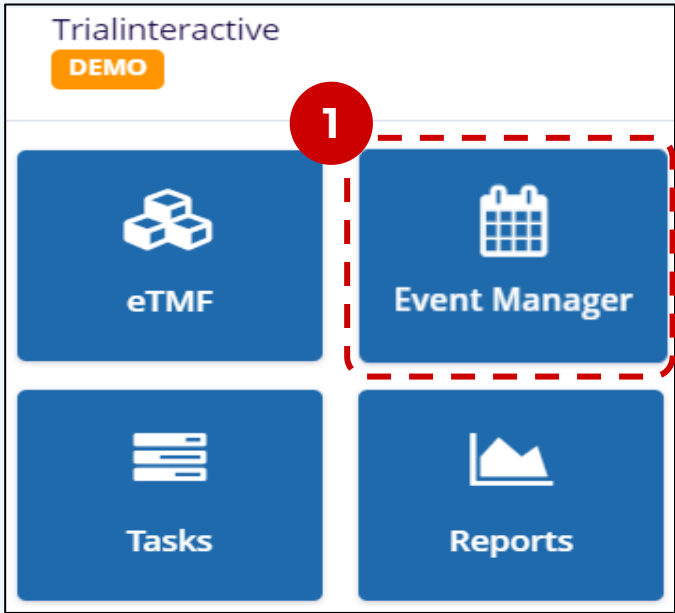
## APPLICABLE TO:

- ☒ Admin
- ☒ Manager
- ☒ Editor
- ☐ Reader
- ☒ eTMF
- ☒ SSU

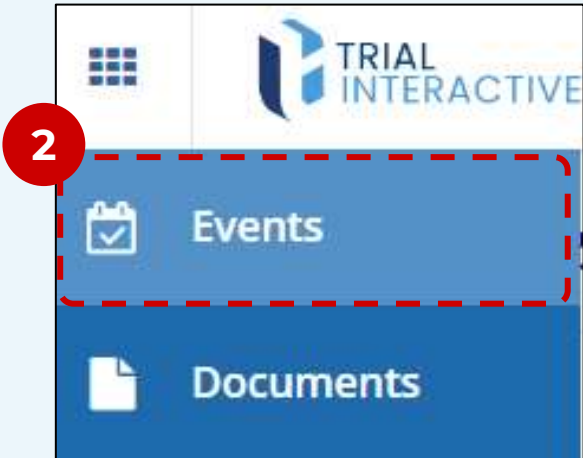


A room will only display Event Manager if it is enabled for the room. Non-Admin users need to have the **Event Manager** action added to their profile to access this module.

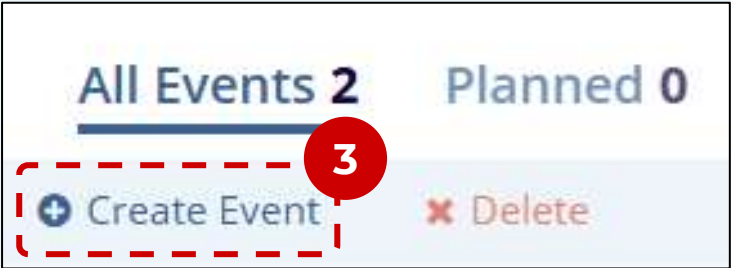
1 Log in and enter the **Event Manager** module via the Navigation Grid.



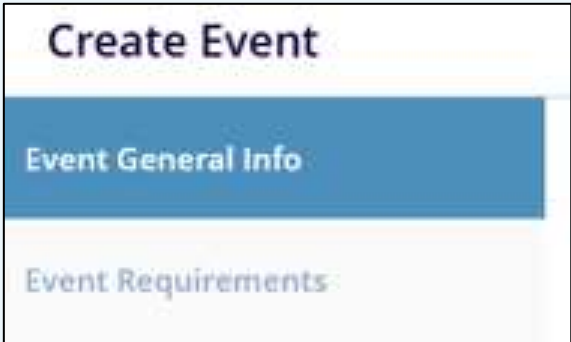
2 Select **Events** from the navigation bar.



3 Click **Create Event**.



4 The Event Creation window consists of two sequential sections.



- 4 Give a **Name** the event.
- 5 Select applicable **Category** and the **Event Type**.

Step 1 ● ○ ✕

Event General Info

Please select the type of event you would like to apply to the eTMF Room Training Team eTMF v10.4.

4

Event Name \*  
Your Event

Category \*  
Study

Event Type \*  

This field is required

This event is for tracking and will not contain any documents

No Due Date is required for this event

Due Date Period ?  
Days

6

- 6 Optional changes include generating a non-document event; suppressing the Due Date requirement; customizing the Due Date Period.

- 7 In the lower section of the page, set the **Status**. Most Events will be 'Planned', while 'Completed' represents events that have already transpired.

7

Status  
PLANNED

8

Planned Date  
22 Nov 2024

Description  
This is an example of an event

- 8 Set the **Planned Date** to when you expect the event to happen.  
Add a **Description** (optional).

- 9 Click **Next** to advance to the *Event Requirements* section.

9

CancelNext

**10** This section lists the documents that will be required when the event completes. Most details here are determined by Event Type settings. You may **Add** as well as **Remove** requirement to tailor the Event to real-world needs.

### Event Requirements

Below are document types that have been marked as required documents for this event. You can modify the list of requirements.

+ Add - Remove

10 Requirements						
		Document Type	Responsible Party	Category	Languages	Required By
<input type="checkbox"/>		Investigator Brochure	Not Applicable	General	<input type="text"/>	General
<input type="checkbox"/>		Protocol	Not Applicable	General	<input type="text"/>	General

**11** Finalize the Event by clicking **Create**.

Cancel Previous Create



- Remember *Planned* events will need to be activated later by changing their status to 'Completed'.
- Suggested reading: job aid **How to Create an Event Type**.