

How to Add an Event

TI version 10.8

APPLICABLE TO:

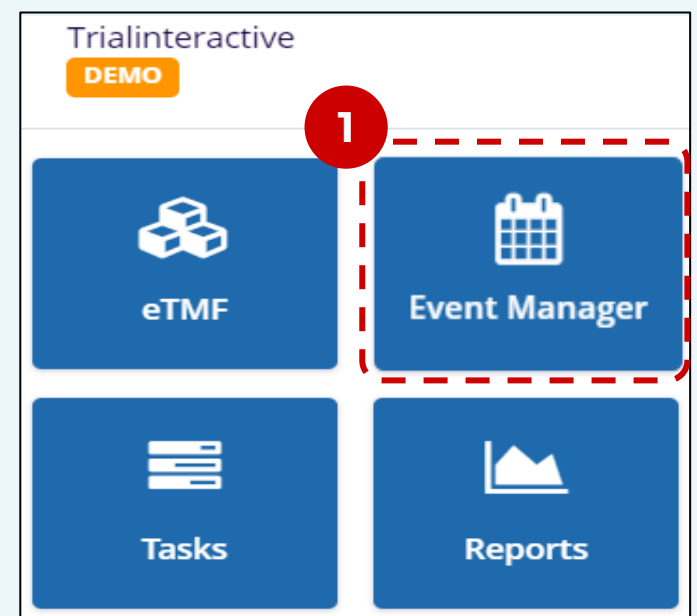
- Admin
- Manager
- Editor
- Reader
- eTMF
- SSU

This Job Aid guides the user in setting up an Event, which can generate a list of placeholders for any document requirements. The list will be enabled when the Event takes place. This means that requirements are tracked when they are actually relevant, keeping the eTMF on track and timely. It also enables better estimation of future workloads and potential bottlenecks, overall reducing potential compliance risk related to missing a document.

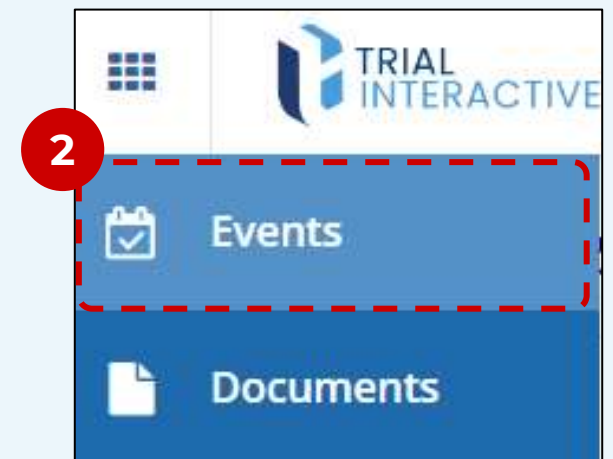


A room will only display Event Manager if it is enabled for the room. Non-Admin users need to have the **Event Manager** action added to their profile to access this module.

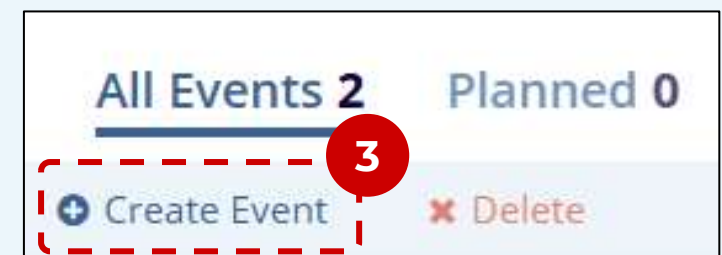
1 Log in and enter the **Event Manager** module via the Navigation Grid.



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



3 Click **Create Event**.



3a The Event Creation window consists of two sequential sections.



4 Give a **Name** to the event.

5 Select applicable **Category** and **Event Type**.

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.

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.

- 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.

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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**.

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- 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**.

For Events to best represent the current expectations for documents submission in and allow for accurate timeliness tracking, it is recommended to change status to *Completed* only when the Event has actually taken place.