

APPLICABLE TO:

- Administrators
- eTMF
- Room Managers
- Study Start-Up
- Editors
- myTI
- Readers

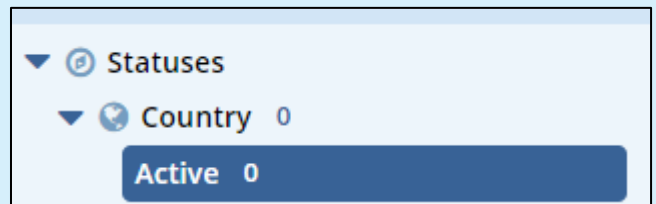
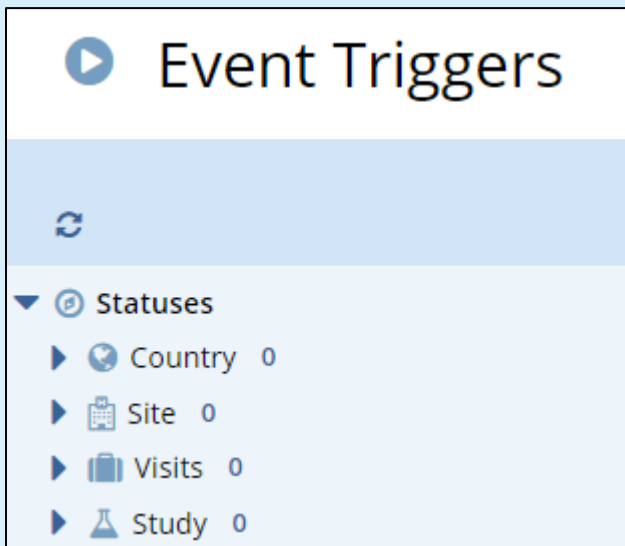


1. Log into a room and select **Event Manager** from the Navigation Grid.

2. Click on the **Triggers** icon located on the left.



3. Choose the status change which will trigger event creation. Expand the folder of your choice and select a status. *Example: Country>Active*



4. The grid will display other existing triggers, if there are any.

Click on **Add** to start creating a new trigger.

+ Add
✎ Edit
🗑 Delete

1 Event Trigger

	Name	Status	Event Type
<input type="checkbox"/>	Country Activation	COMPLETED	Country Activation

5. A trigger must use an existing Event Type. Select one, fill the trigger name, and other fields as you prefer. Then, click on **Configure Autonaming**.

Event Trigger General Info

Please select the Event Type you would like to trigger with this status change.
Upon triggering, this new Event will be automatically created and set to the selected status.

Country Status

Event Trigger Name *

Event Name *

⚙ Configure Autonaming

This field is required

Category *

Event Type *

This event is for tracking and will not contain a

No Due Date is required for this event

Due Date Period ?

 Days ⬆ ⬇ ⬆

6. Autonaming ensures that each event created by the trigger has a unique name. To accomplish that, choose auto complete **Fields** or logical **Functions**. Then click **Save**.

Configure Autonaming ✕

Create a rule for the event names.

Rule Editor

```
##CountryName####EventType##
```

Preview ↻

Fields

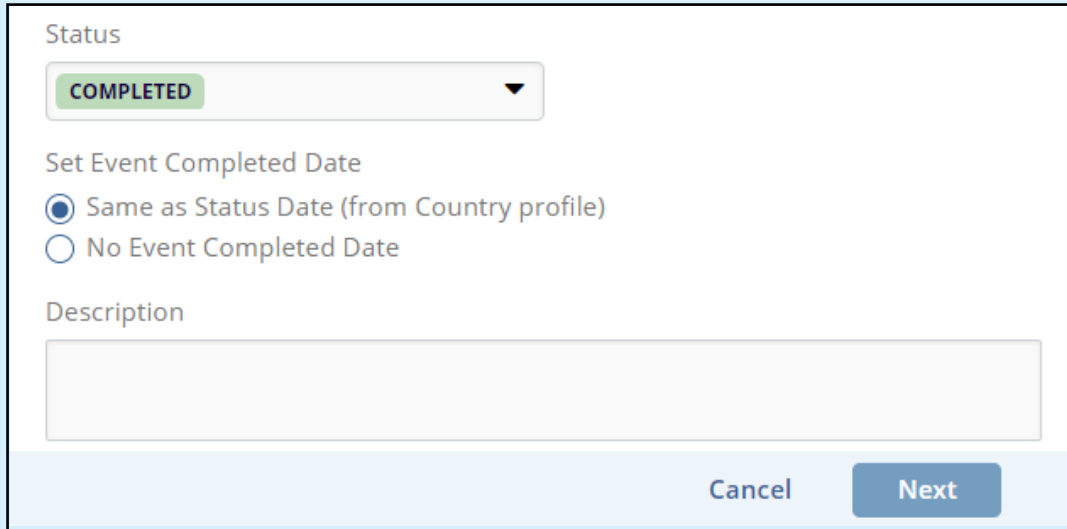
Functions

Fields	Insertion	Info	
PI First Name	##PrincipalInvestigatorFirst...	<i>i</i>	+ Add
PI Last Name	##PrincipalInvestigatorLast...	<i>i</i>	+ Add
TI Client	##SponsorName##	<i>i</i>	+ Add

 In this example, we selected fields so that an Event created for Angola, would be called “*Angola Infrastructure Ready*”.

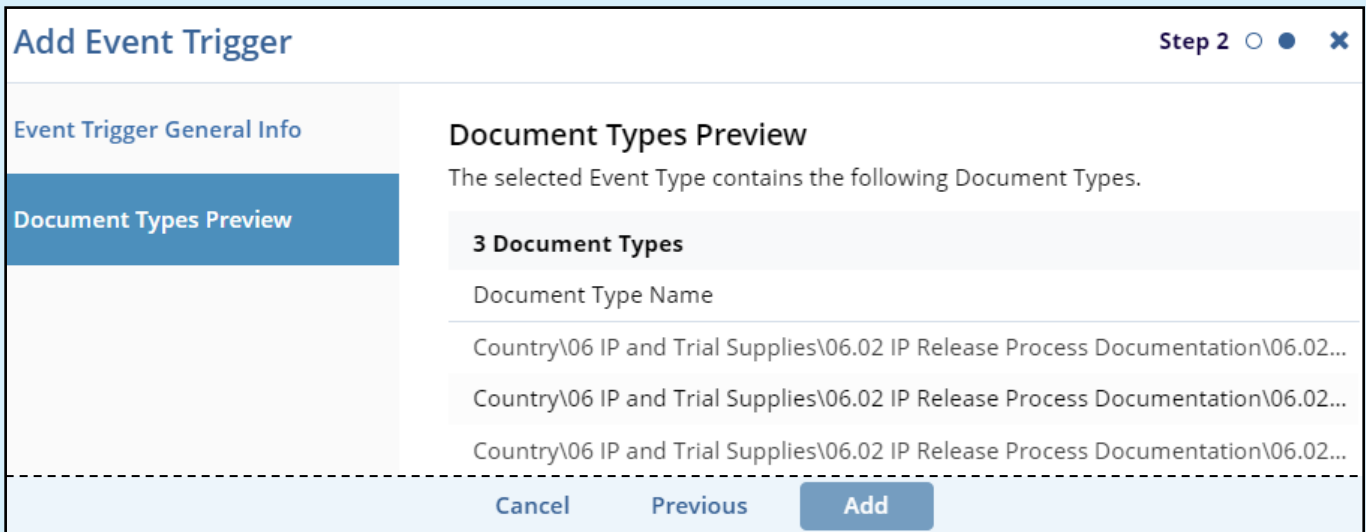
Functions can be used for various purposes, like creating partial strings of text or including the date in the name of the event.

7. In the **Add Event Trigger** window, choose event status settings (we recommend *Completed* be used for any event that will include placeholders for documents), then click **Next**.



The screenshot shows a form titled "Status" with a dropdown menu set to "COMPLETED". Below this is a section "Set Event Completed Date" with two radio button options: "Same as Status Date (from Country profile)" (which is selected) and "No Event Completed Date". There is also a "Description" text input field. At the bottom right, there are "Cancel" and "Next" buttons.

8. Review the Document Types (placeholders) that new events from this trigger will generate. Notice that Event Types and related placeholders must have been set previously. Click **Add** to finalize the process.



The screenshot shows the "Add Event Trigger" window at "Step 2". The left sidebar has "Document Types Preview" selected. The main area is titled "Document Types Preview" and contains the text: "The selected Event Type contains the following Document Types." Below this, it lists "3 Document Types" with a table:

Document Type Name
Country\06 IP and Trial Supplies\06.02 IP Release Process Documentation\06.02...
Country\06 IP and Trial Supplies\06.02 IP Release Process Documentation\06.02...
Country\06 IP and Trial Supplies\06.02 IP Release Process Documentation\06.02...

At the bottom, there are "Cancel", "Previous", and "Add" buttons.