
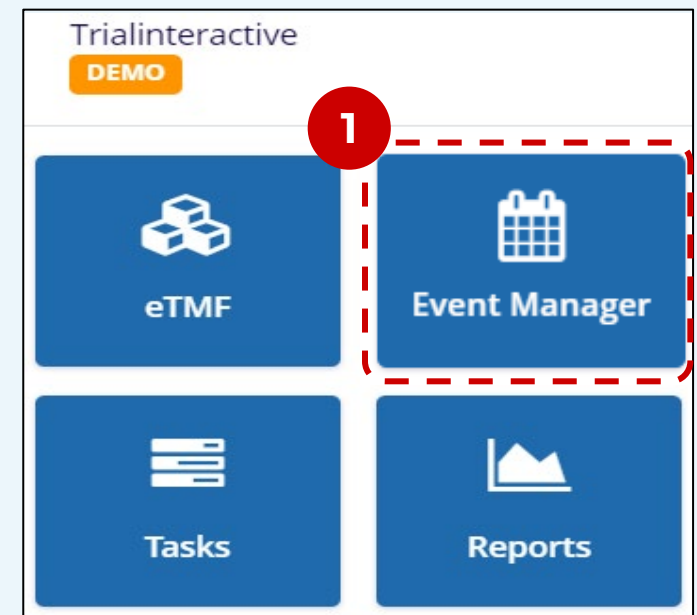


APPLICABLE TO:

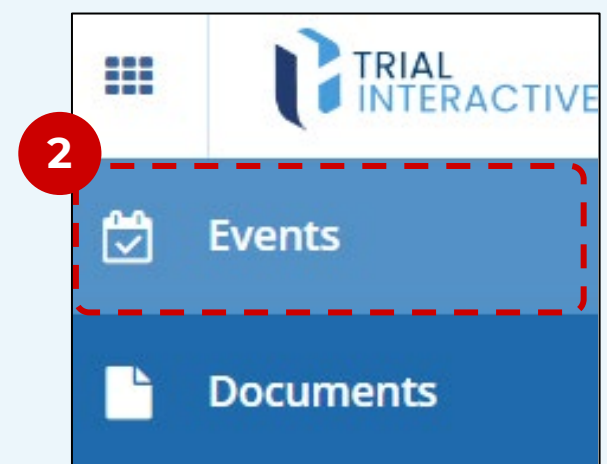
- Admin
- Manager
- Editor
- Reader
- eTMF
- SSU

 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.

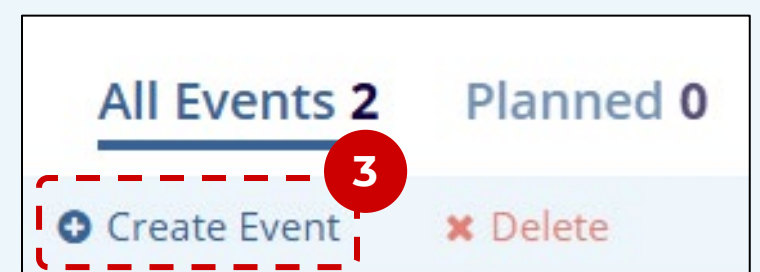
1 Log in and enter the **Event Manager** module via the Navigation Grid.



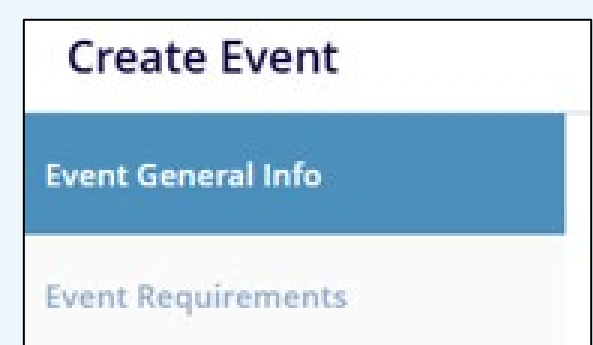
2 Select **Events** from the navigation bar.



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**.

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.

10 + 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**

11

- 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**.