OnCore Navigation

The OnCore Menu Bar provides links to your most frequently used tools. The links on your Favorites Bar can be customized and rearranged.

Clicking the OnCore logo returns you to the Home page.

The main Menu contains all pages and consoles that you have permission to see (e.g., PC Console or CRA Console).

The Favorites Bar appears under the header. It contains menus and menu items that you have permission to see (such as the PC Console).

The environment name is displayed in a configurable colored badge.

The Quick Launch icon provides the user access to OnCore pages using the keyboard. Click the rocket ship or type CTRL+K (Windows) or CMD+K (Mac) to open the Quick Launch tool.

The User Menu in the top right corner provides access to Help links (such as the Learning Portal), the Effort Tracking module, and user actions such as resetting your PIN.

The gear icon opens the Home Screen Configuration page, allowing you to select widgets that provide quick access to your protocols, subjects, saved searches, assigned tasks, recently run reports, or other frequently used tools.
The Favorites Bar

All of the menus and tools that you have access to appear under the main Menu. **Click the star** next to any category or tool to add it to your Favorites Bar. Then, **drag and drop** the menus and items in your Favorites Bar to reorder them.

**Click the ★ next to a category to add the entire menu to your Favorites Bar...**

**...or click the ★ next to one menu item**

**Rearrange the items in your Favorites Bar using drag-and-drop**
The User Menu

Click the drop-down arrow next to your name to open the User Menu, which provides links to your home page, your user profile, the effort tracking tool, and custom help links such as the Learning Portal, Onsemble.net, and other resources made available by your OnCore administrators.

Clicking **About** will display information about the version of OnCore and all its modules installed in the current environment.
Personalizing Your OnCore Home Page

The home page, also known as your dashboard, is your initial landing page when you log in to OnCore. You can return to the home page at any time by clicking on the OnCore logo in the upper left corner.

The home screen can include a variety of widgets. A widget is a personalized list of OnCore data; widgets provide quick access to frequently used elements in OnCore, such as protocols, subjects, and reports. Widgets are provided for:

- Protocols
- Subjects
- SAEs
- Reports
- Registrations
- Saved Protocol Searches
- Tasks

Users can choose the widgets that appear on their home screen and configure the records and fields that appear in the widgets.

All users will have an Announcements widget on their home screen. This widget shows system-wide messages that are intended for all users to see when they log in to OnCore. Only users with the “Home Screen Announcements Update” permission can add or delete messages.
Add widgets to the home page

Users can add widgets to their home page and arrange them in any order. The information and links in each widget are configured by each user.

1. From the Home Screen Configuration page, click the **Widgets** tab.

   The widgets that have already been added to the home page are shown in the column 1 and column 2 boxes at the top. Widgets that can be added to your home page are listed at the bottom of the page.
The available widgets are:

<table>
<thead>
<tr>
<th>Widget Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Protocols</td>
<td>Displays high-level protocol information.</td>
</tr>
<tr>
<td>Subjects</td>
<td>Displays subject information.</td>
</tr>
<tr>
<td>SAEs</td>
<td>Displays SAE information.</td>
</tr>
<tr>
<td>Reports</td>
<td>Lists the most recently accessed reports.</td>
</tr>
<tr>
<td>Registration</td>
<td>Displays subjects who are ready for registration.</td>
</tr>
<tr>
<td></td>
<td><em>Only appears if the registration workflow is enabled. (The SHOW_READY_FOR_REGISTRATION configuration is set to TRUE.</em>)*</td>
</tr>
<tr>
<td>Saved Searches</td>
<td>Displays links to saved Protocol and Subject Searches.</td>
</tr>
<tr>
<td>Active Tasks</td>
<td>Displays upcoming tasks assigned to a user by name or role. Active tasks have a Target Date and are not waiting on any previous tasks to be completed. Active tasks represent to-do items that the user can complete as soon as possible.</td>
</tr>
<tr>
<td>Upcoming Tasks</td>
<td>Displays upcoming tasks assigned to a user by name or role. Upcoming tasks have a Target Date and have at least one incomplete previous task, or have no Target Date yet. Upcoming tasks represent to-do items that the user does not have to work on right away.</td>
</tr>
</tbody>
</table>
2. Select the **Add** checkboxes for the **Protocols, Reports,** and **Subjects** widgets.

3. Click **Save**.

4. Click any widget in column 1 or column 2 and use the **green arrows** to move it up or down, or to a different column.

5. Click **Save**.

6. Click the **OnCore logo** in the top left corner to navigate back to the home page.

When you first add the protocols and subjects widgets to your home page, they will be blank.

**Configure what appears in the protocols widget**

1. Click the **gear icon** in the header of the protocols widget.

2. Select **Yes** in the Display Bookmarked Protocols field.

3. Select **Yes** in the Display Assigned Role field.

4. Click the **Please select a role** link.

5. Select the **role(s)** for which you want to view your protocol assignments. For example, select the following:

   - Protocol Creator (will include you for the protocol you created during class!)
   - Study Site Contact
6. Click **Save** in the pop-up window, then click **Save** again to return to your home page.

If no protocols appear in your widget, navigate to **Protocols > PC Console** and open a protocol of your choice. Click the star in the top left corner of the PC Console to bookmark it, then click the OnCore logo to return to your home page.

7. Click the expand icon in the header of the protocols widget to see more information about the protocols in your widget.

8. Click **Close** to return to the regular view of your home page.
By default, the Protocol No., Status, and total Accrual to date appear for each protocol included in your widget. You can customize the information that appears in your “dashboard view” and your “expanded view.” Your personal settings will not affect any other OnCore users.

9. Click the **gear icon** in the header of the protocols widget.

10. Click the **Fields** tab.

11. Select the checkboxes for the fields you’d like to see in your dashboard view and in your expanded view, then click **Save**.

   • For example, select the Short Title and Principal Investigator fields.

The fields selected for your dashboard view are now visible in your widget. Similar steps can be used to configure what appears in your Subjects widget.
Navigating in OnCore

Menus and menu items

Many of the features of OnCore can be viewed in the PC Console. To open the PC Console, click the arrow next to the Protocols menu. The Protocols menu will always be in your main Menu, but it can also be added to your Favorites Bar.

![Menu diagram]

A list of menu items appears; select the PC Console menu item.

In OnCore, the action of moving through several options to reach a desired location is called navigation. For convenience, navigation to a specific OnCore page is often described in a path, such as Subjects > Subject Console.

In the above example, selecting PC Console from the Protocols menu would be abbreviated in the following phrase: Navigate to Protocols > PC Console.
Consoles

OnCore contains several consoles. A console is a set of related pages for a particular workflow, function, or type of data. For example, the PC Console displays information about one protocol at a time: details that might be of interest to a Protocol Coordinator. The PC Console includes the protocol number and title, the type of study, the staff assigned to the protocol, the protocol sponsor, and other protocol-related information.

In the same way, the Subject Console displays information about a selected subject. It also provides tools where you can update the subject's demographic information, document the subject's consent, or view the subject's calendar.

To explore the elements of a console:

1. Navigate to Protocols > PC Console.

   The PC Console opens, allowing you to select a protocol.

2. All protocols in OnCore are identified by an alphanumeric protocol number. Select a protocol by entering the protocol number in the Select Protocol field.
Find-as-you-type fields

The Select Protocol field is a *find-as-you-type field*. A list of potential matching records appears as soon as you start typing. This field can be used to help you locate your protocol by limiting the number of potential matches.

For example, if you type 12 in this field, OnCore will immediately display a scrolling list of all protocols containing 12 as part of its protocol number, short title, or any other searchable identifier. OnCore will search the following identifiers:

- Protocol No.
- Short Title
- IRB No.
- PRMC/SRC No.
- Sponsor Protocol No.
- Pharmacy No.
- CTSI No.
- IND and IDE identifiers
- Contract No.
- NCT Number

OnCore will display the first 50 possible matches. If you don't find the record you are searching for, enter additional characters to narrow down the list of results.

1. Type 12 in the **Select Protocol** field in the PC Console.
2. Select any protocol from the drop-down list.

The PC Console displays the protocol record and its associated information.
**Console header**

The console header provides at-a-glance information about the selected record (such as the protocol, subject, or calendar, and so on) within any console in OnCore. In the example below, the PC Console shows the protocol number, sponsor, principal investigators, status, and accrual information for a particular protocol.

**Vertical tabs**

Along the left side of the PC Console is a column of vertical tabs. Each vertical tab allows you to enter and view information specific to the area described by the tab. For example, the Treatment tab allows you to configure the protocol’s treatment steps and arms.

**Horizontal tabs**

Some vertical tabs in OnCore are further organized into horizontal tabs. Horizontal tabs allow for easy navigation between subsets of the information contained on the selected vertical tab.
View-only mode vs. update mode

Many pages in OnCore are displayed in view-only or update mode. In view-only mode, you can view data, but you cannot make modifications to it. In update mode, the fields on the page become editable, and radio buttons and checkboxes become selectable, allowing you to make modifications to the data.

The ability to view or update data in OnCore is controlled by assigned permissions. If you have the permission to update information on a screen in OnCore, an Update button will appear in the lower right corner of the page. In update mode, you can edit data in text fields, select different values from the drop-down menus, and select or clear options on a page.

Once you are in update mode, several additional buttons appear at the bottom of the page. These buttons typically include the Submit, Clear, and Close buttons.

- **Submit**: Saves the data entered on the page; the page remains in update mode.
- **Clear**: Restores all fields to their most recently saved values; it does not erase all data on the page.
- **Close**: Returns the page to inquiry mode; any unsaved data is discarded.
Add blocks

Some OnCore pages contain *add blocks*, which are sections on the page that allow you to update a subset of the data contained on that page. Add blocks contain their own set of New, Update, Clear, Close, and Submit buttons.

In the example that follows, after selecting a role and a staff member, you must click Add to assign the staff member to a protocol:

Choose a Role and the Staff Name, then click Add

The Clear and Close buttons on the Staff tab are specific to this add block; you can click Clear to remove the selections or click Close to return to view mode on the Staff tab.
Date widgets

Fields that have the date icon to the right of the field display date widgets. Clicking on the date icon launches the date widget, where you can select your date from the date widget calendar.

Date widget and keyboard shortcuts

OnCore accepts dates in a number of formats, including one- or two-digit months and days and two- or four-digit years. OnCore converts all entries into the MM/DD/YYYY date format. If you enter two-digit months and days, you can omit the slashes. Any of the following are acceptable:

- 12/2/09 will become 12/02/2009
- 09/01/1955 is accepted as-is
- 4/6/88 will become 04/06/1988
- 080820 will become 08/08/2020
Date fields in OnCore also accept a variety of *keyboard shortcuts*, or dates that are calculated relative to another date, as opposed to a specific date.

<table>
<thead>
<tr>
<th>Shortcut</th>
<th>Resulting entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>t</td>
<td>Inserts the current date</td>
</tr>
<tr>
<td>t + n</td>
<td>Inserts a date (n) days from today:</td>
</tr>
<tr>
<td>t - n</td>
<td>(t+3) is three days from today</td>
</tr>
<tr>
<td>(where (n) is a number)</td>
<td>(t-1) inserts yesterday’s date (one day ago)</td>
</tr>
<tr>
<td>w – n</td>
<td>Inserts the current date plus/minus (n) number of weeks</td>
</tr>
<tr>
<td>w + n</td>
<td>(w-6) will insert a date six weeks ago</td>
</tr>
<tr>
<td>m + n</td>
<td>(w+2) will insert a date two weeks from today</td>
</tr>
<tr>
<td>m – n</td>
<td>Inserts the current date plus/minus (n) number of months</td>
</tr>
<tr>
<td>y + n</td>
<td>Inserts the current date plus/minus (n) number of years</td>
</tr>
<tr>
<td>y – n</td>
<td></td>
</tr>
<tr>
<td>mb or me</td>
<td>Inserts the beginning or end of the month, respectively; it can be used alone or with + or – with a number</td>
</tr>
<tr>
<td>yb or ye</td>
<td>Inserts the beginning or end of the year, respectively; it can be used alone or with + or – with a number</td>
</tr>
</tbody>
</table>

**NOTE:** When entering a keyboard shortcut into a date widget field, you can press Enter, Tab, or click anywhere outside the date widget to calculate the appropriate date in MM/DD/YYYY format.

![Image of a date widget with a keyboard shortcut and the result](image)

**Test your knowledge:** How many different ways could you enter January 1\(^{st}\) 2019 into a date widget in OnCore?
Tips for Using OnCore Successfully

Use only one instance of OnCore at a time

Only one session (browser window or browser tab) of OnCore should be open at a time on a single system. Multiple sessions of OnCore could result in duplicate data and strange behavior in the application.

Avoid using the browser’s back button

Use OnCore’s buttons, tabs, and menus to navigate within the program; do not use the browser’s navigation buttons. Using the browser toolbar to navigate might lead to unexpected results, such as unsaved data or webpage errors.

Single-click buttons and links

Especially when clicking Save or Submit to create a new record, click once so that only one record is created and duplicate data is not saved in the database. Avoid double-clicking with the mouse when working in OnCore.

Use a computer with a keyboard and mouse

OnCore stores large volumes of complex information about the protocols, subjects, calendars, and budgets in your research portfolio. When using the application, use a keyboard and a mouse for efficient data entry. Using a tablet or touchscreen can make data entry feel cumbersome or time-consuming, while using a keyboard and mouse can speed up your workflows significantly.

Allow pop-up windows when using OnCore

OnCore uses many pop-up (browse) windows that allow you to make selections and enter data. If your browser is set to prevent pop-up windows from opening, it will also prevent OnCore’s browse windows from opening.

You must allow pop-up windows to open in each browser that you are using with OnCore: