OCR805

OnCore Reports and Searches

UF Office of Clinical Research

Version 11/02/2020

OnCore Enterprise Research

Table of Contents

Tips for Using OnCore Successfully

Disable pop-up blockers

OnCore uses many pop-up windows that allow you to make selections and enter data. You must set your browser to allow pop-ups in order to use OnCore.

1. Confirm that your browser is set to allow pop-ups:

- Chrome: Click ⋮ upper right > Settings > Advanced > Privacy > Content > Pop-ups
- Firefox: Click ≡ upper right > Options > Content > Pop-ups
- IE: Click ⚙ upper right > Internet Options > Privacy > Pop-up Blocker
- Safari: Click Safari upper left > Preferences > Security > Block pop-up windows

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.

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 application misbehavior.

Supported browsers

Supported browsers are: Chrome, Firefox, Internet Explorer [8, 9, 10, 11], Safari.

Minimum screen resolution

Minimum screen resolution is: 1024 x 768.

Using Protocol Search

Protocol Search is a robust searching tool that allows you to specify search criteria and then choose additional protocol data to appear in the search results. You can export your search results to a PDF report or Excel spreadsheet.

Review the available data field groupings

1. Navigate to **Menu > Protocols > Protocol Search**.

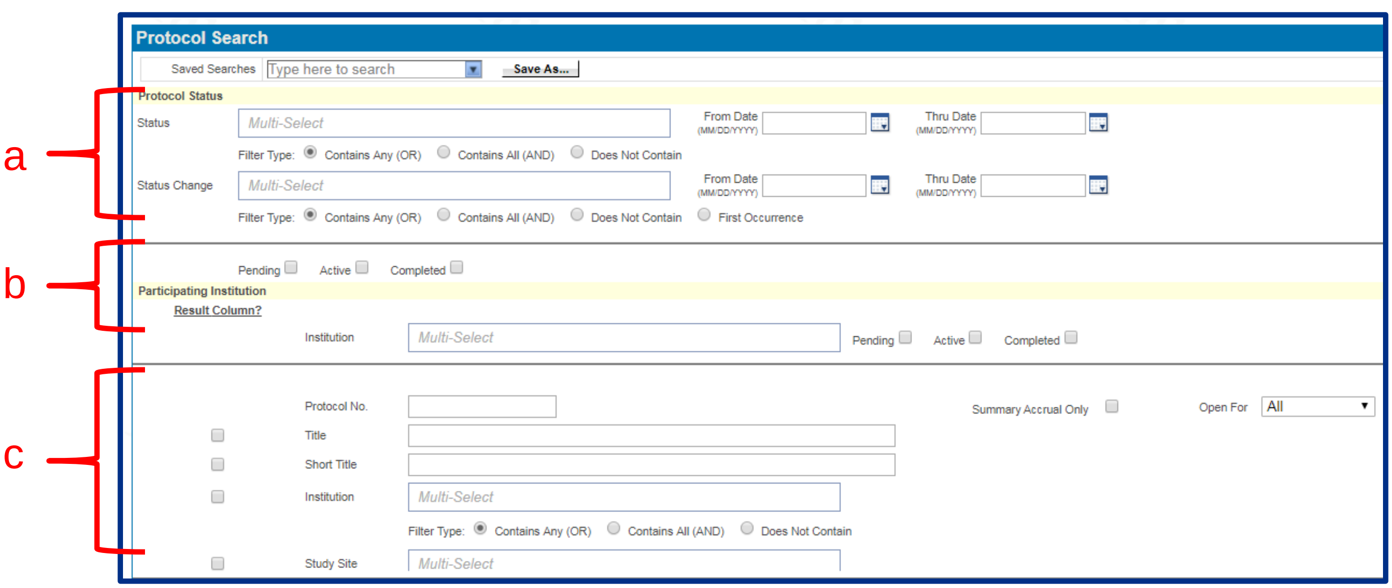
   As you can see, the Protocol Search page provides dozens of data fields, allowing for complex and detailed searches. The fields are grouped according to where that field appears in the protocol console tabs.

   The first three groupings you see are:

   a. Protocol Status

   b. Participating Institution

   c. Protocol Identifiers (Number, Title, Short Title, etc.)

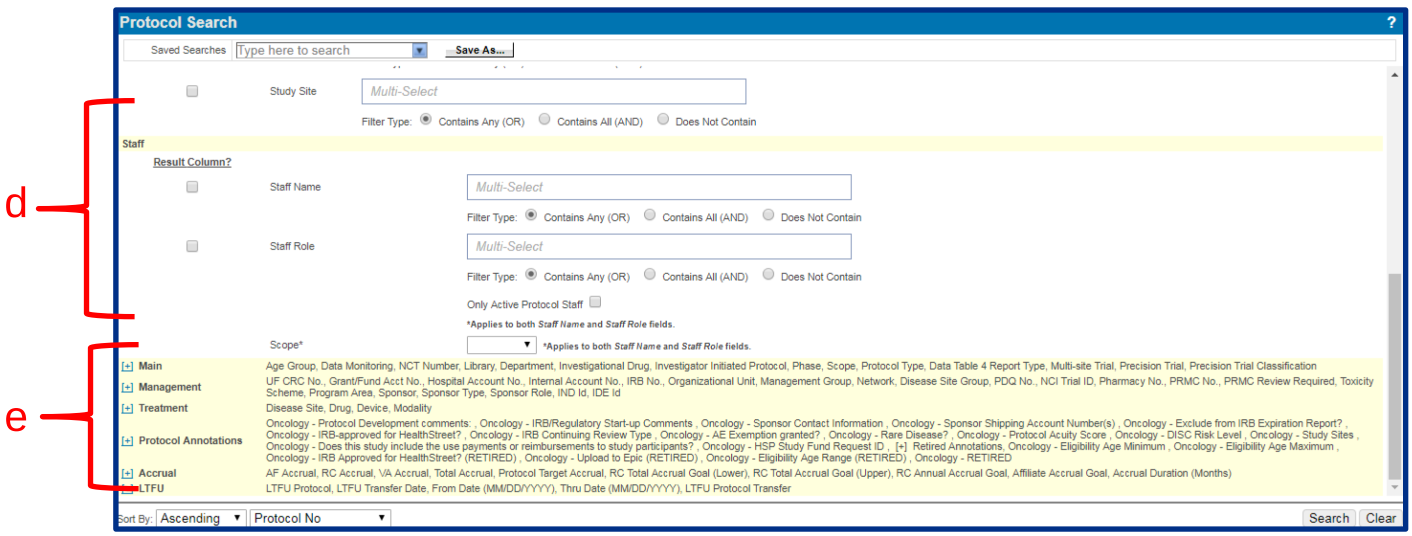


2. Roll the screen display down. The next groupings you see are:

d. Staff

e. Collapsed sections that include:

- Main
- Management
- Treatment
- Protocol Annotations
- Accrual
- LTFU

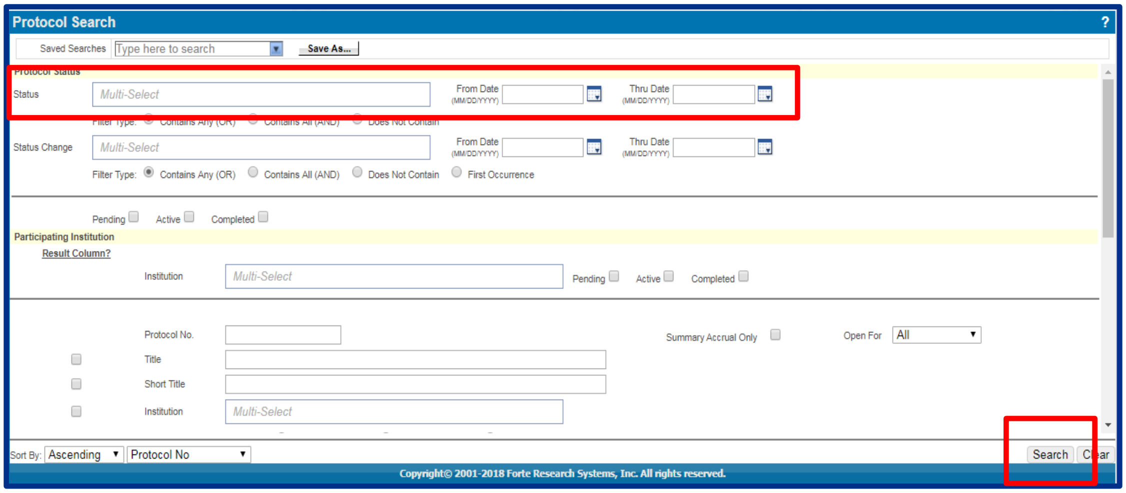


Conduct a protocol search

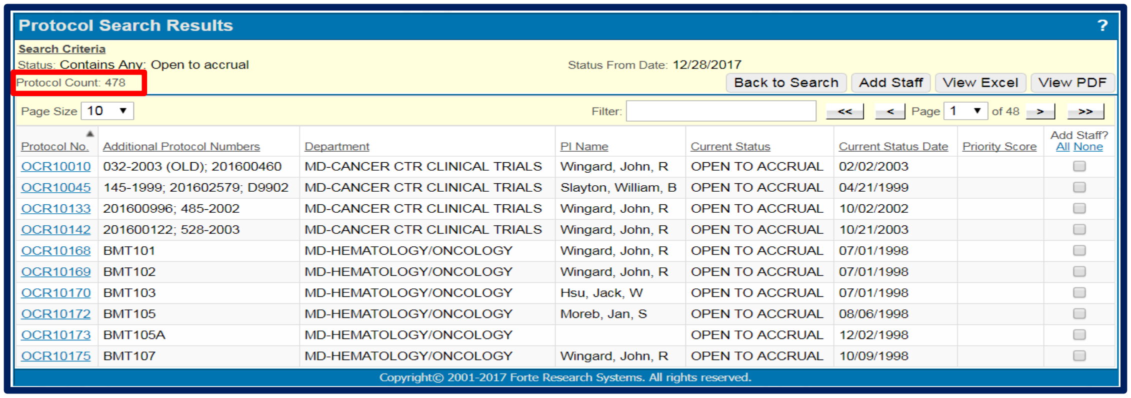
1. In the **Protocol Status** section, locate the **Status** field. The **Status** field allows you to search for protocols that had a specific status *at some point* during a time range.

2. Click in the **Status** field and select **Open to Accrual**.

3. Enter a **From Date** of **t** (today's date) and leave the **Thru Date** blank.



4. Click **Search**.



Protocol Search Results

Search Criteria
Status: Contains Any: Open to accrual
Status From Date: 12/28/2017
Protocol Count: 478

Back to Search | Add Staff | View Excel | View PDF

Page Size 10 | Filter: | Page 1 of 48

Protocol No.	Additional Protocol Numbers	Department	PI Name	Current Status	Current Status Date	Priority Score	Add Staff? All None
OCR10010	032-2003 (OLD); 201600460	MD-CANCER CTR CLINICAL TRIALS	Wingard, John, R	OPEN TO ACCRUAL	02/02/2003		
OCR10045	145-1999; 201602579; D9902	MD-CANCER CTR CLINICAL TRIALS	Slayton, William, B	OPEN TO ACCRUAL	04/21/1999		
OCR10133	201600996; 485-2002	MD-CANCER CTR CLINICAL TRIALS	Wingard, John, R	OPEN TO ACCRUAL	10/02/2002		
OCR10142	201600122; 528-2003	MD-CANCER CTR CLINICAL TRIALS	Wingard, John, R	OPEN TO ACCRUAL	10/21/2003		
OCR10168	BMT101	MD-HEMATOLOGY/ONCOLOGY	Wingard, John, R	OPEN TO ACCRUAL	07/01/1998		
OCR10169	BMT102	MD-HEMATOLOGY/ONCOLOGY	Wingard, John, R	OPEN TO ACCRUAL	07/01/1998		
OCR10170	BMT103	MD-HEMATOLOGY/ONCOLOGY	Hsu, Jack, W	OPEN TO ACCRUAL	07/01/1998		
OCR10172	BMT105	MD-HEMATOLOGY/ONCOLOGY	Moreb, Jan, S	OPEN TO ACCRUAL	08/06/1998		
OCR10173	BMT105A	MD-HEMATOLOGY/ONCOLOGY		OPEN TO ACCRUAL	12/02/1998		
OCR10175	BMT107	MD-HEMATOLOGY/ONCOLOGY	Wingard, John, R	OPEN TO ACCRUAL	10/09/1998		

Copyright© 2001-2017 Forte Research Systems. All rights reserved.

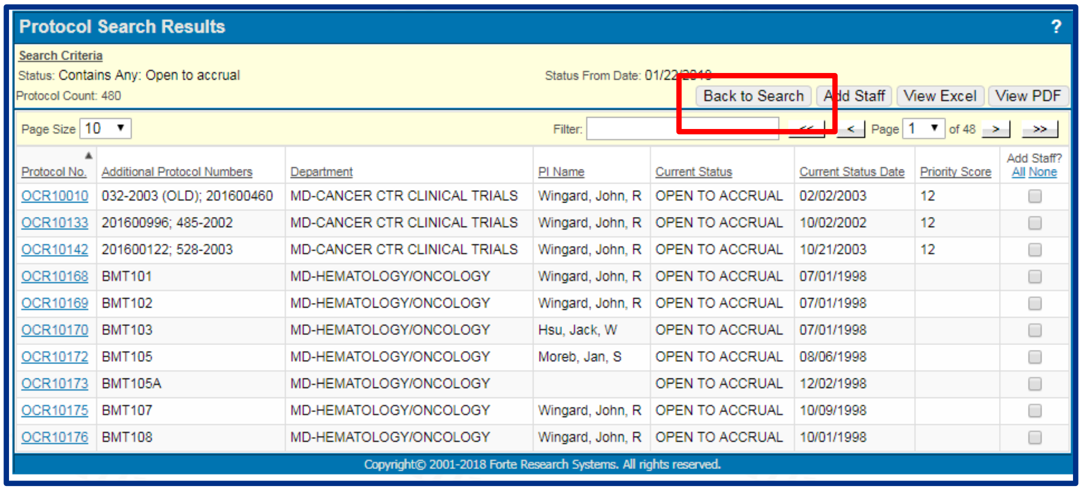
5. The Protocol Search Results page appears with your search criteria listed in the page header.

6. The **Protocol Count** shows how many protocols match your search criteria.

Add more criteria to a protocol search

After running a search, you can narrow your results further.

1. Click the **Back to Search** button at the top of results.


Protocol Search Results ?

Search Criteria

Status: Contains Any: Open to accrual — Status From Date: 01/22/2018

Protocol Count: 480 — Back to Search | Add Staff | View Excel | View PDF

Page Size 10 — Filter: — << < Page 1 of 48 > >>

Protocol No.	Additional Protocol Numbers	Department	PI Name	Current Status	Current Status Date	Priority Score	Add Staff? All None
OCR10010	032-2003 (OLD); 201600460	MD-CANCER CTR CLINICAL TRIALS	Wingard, John, R	OPEN TO ACCRUAL	02/02/2003	12	
OCR10133	201600996; 485-2002	MD-CANCER CTR CLINICAL TRIALS	Wingard, John, R	OPEN TO ACCRUAL	10/02/2002	12	
OCR10142	201600122; 528-2003	MD-CANCER CTR CLINICAL TRIALS	Wingard, John, R	OPEN TO ACCRUAL	10/21/2003	12	
OCR10168	BMT101	MD-HEMATOLOGY/ONCOLOGY	Wingard, John, R	OPEN TO ACCRUAL	07/01/1998		
OCR10169	BMT102	MD-HEMATOLOGY/ONCOLOGY	Wingard, John, R	OPEN TO ACCRUAL	07/01/1998		
OCR10170	BMT103	MD-HEMATOLOGY/ONCOLOGY	Hsu, Jack, W	OPEN TO ACCRUAL	07/01/1998		
OCR10172	BMT105	MD-HEMATOLOGY/ONCOLOGY	Moreb, Jan, S	OPEN TO ACCRUAL	08/06/1998		
OCR10173	BMT105A	MD-HEMATOLOGY/ONCOLOGY		OPEN TO ACCRUAL	12/02/1998		
OCR10175	BMT107	MD-HEMATOLOGY/ONCOLOGY	Wingard, John, R	OPEN TO ACCRUAL	10/09/1998		
OCR10176	BMT108	MD-HEMATOLOGY/ONCOLOGY	Wingard, John, R	OPEN TO ACCRUAL	10/01/1998		

Copyright© 2001-2018 Forte Research Systems. All rights reserved.

2. Notice that the criteria you last used is still selected in the Protocol Search page (i.e. Protocol Status = Open to accrual as of today).

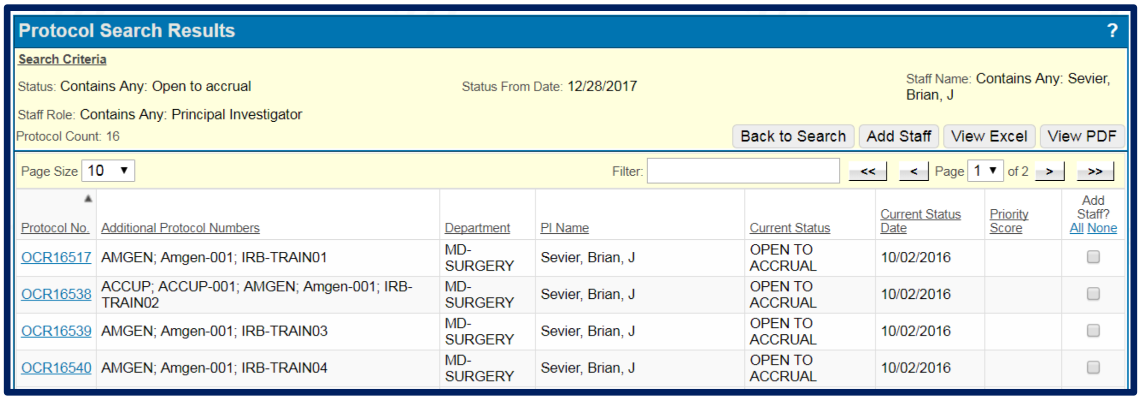
3. Roll down the screen to the **Staff** section.

4. Click in the **Staff Name** field and select **Brian Sevier**.

5. In the **Staff Role** field, select **Principal Investigator**.

6. Click **Search**.

Now only Brian Sevier’s protocols appear in the search results.


Protocol Search Results ?

Search Criteria

Status: Contains Any: Open to accrual — Status From Date: 12/28/2017 — Staff Name: Contains Any: Sevier, Brian, J

Staff Role: Contains Any: Principal Investigator

Protocol Count: 16 — Back to Search | Add Staff | View Excel | View PDF

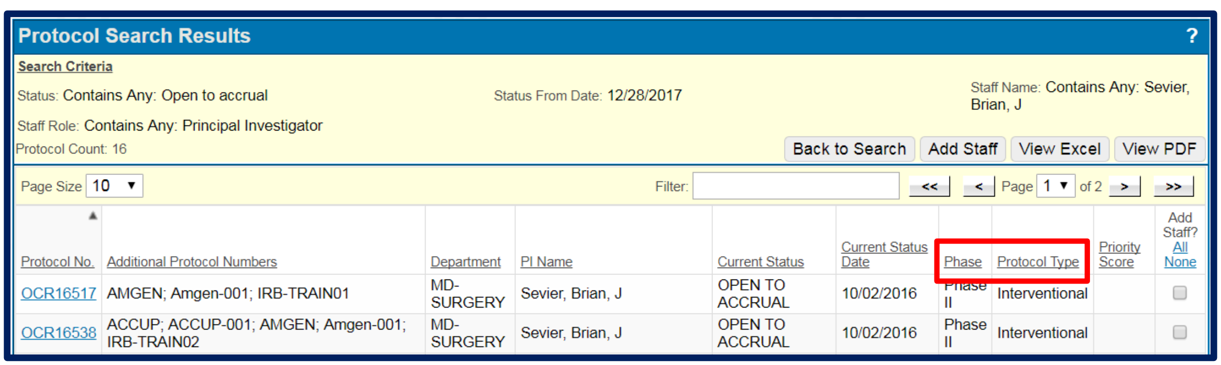
Page Size 10 — Filter: — << < Page 1 of 2 > >>

Protocol No.	Additional Protocol Numbers	Department	PI Name	Current Status	Current Status Date	Priority Score	Add Staff? All None
OCR16517	AMGEN; Amgen-001; IRB-TRAIN01	MD-SURGERY	Sevier, Brian, J	OPEN TO ACCRUAL	10/02/2016		
OCR16538	ACCUP; ACCUP-001; AMGEN; Amgen-001; IRB-TRAIN02	MD-SURGERY	Sevier, Brian, J	OPEN TO ACCRUAL	10/02/2016		
OCR16539	AMGEN; Amgen-001; IRB-TRAIN03	MD-SURGERY	Sevier, Brian, J	OPEN TO ACCRUAL	10/02/2016		
OCR16540	AMGEN; Amgen-001; IRB-TRAIN04	MD-SURGERY	Sevier, Brian, J	OPEN TO ACCRUAL	10/02/2016		

Add more columns to your search results page

The search criteria determine which protocols appear in the results page. It might be helpful to see more information about these protocols. If so, you can select additional columns to display.

1. Click **Back to Search**.
2. The search criteria you used are retained in the Protocol Search page.
3. Scroll down and click the blue **[+]** on the left edge of the **Main** section.
4. Additional fields are now visible in Protocol Search. These fields can be used to further refine your search results, or these fields can be included as columns on the results page.
5. Select the checkboxes for **Phase** and **Protocol Type**.
6. Scroll down and Click the blue **[+]** on the left edge of the **Accrual** section.
7. Select the checkbox for **Total Accrual**.
8. Click **Search**.
9. The same number of protocols appear in the search results because you did not add any additional protocol criteria, but now you have more information about the same protocols on the results page:



OnCore® Enterprise Research

Adding a staff member to multiple protocols at once

Protocol Search can be used to identify protocols to which certain staff members should be assigned. Remember that protocol staff assignments can be used to send notifications, to assign tasks in a task list, and for security purposes. Once the appropriate protocols have been identified, one or more staff members can be assigned to those protocols in bulk.

1. On the right side of the screen, click several boxes of your choice in the "**Add Staff? All None**" column.

2. Click **Add Staff**.

3. In the pop up box, start typing the last name "**Rules**" and select your favorite character to add to the protocols you selected with the role of "**Other Staff**" and start date **y-1**.

4. Click on the **blue Protocol No**. hyperlink for one of your selected protocols and check the staff horizontal tab; your favorite character should now appear in the staff list with a role of "Other Staff" and a start date of y-1.

Important!

Protocol Search cannot be used to remove staff from protocols or subjects

If a staff person leaves your department or organization and you want to remove them from all protocols (and/or replace them with a different staff person):

- Go to the OnCore Support webpage: http://clinicalresearch.ctsi.ufl.edu/oncore/support/other-support-requests/
- Complete an "**Other Support Requests"** entry.
- The OnCore Support team will fulfill your request.

Conduct a protocol search using date ranges

Searches using date ranges can be more complicated. In the Protocol Status section, for example, the **Status** field requires that you first choose a status, and then enter date criteria as follows:

- To match protocols having the selected status within a specified date range, enter both a **From Date** and a **Thru Date**.
- To match protocols having the selected status at any time after the **From Date**, leave the **Thru Date** blank.
- To match protocols having the selected status at any time prior to the **Thru Date,** leave the **From Date** blank.

1. The following instructions show you how to limit your previous search to only those protocols that were **Open to Accrual** at some point in the last year.
2. Navigate back to **Menu > Protocols > Protocol Search**.
3. **Clear** your search selections using the button at the bottom of the page.
4. In the **Status** field, select **Open to Accrual** from the drop-down list. In the corresponding date fields, enter the following date shortcuts:
   - **From Date**: **yb-1** (*indicating the beginning of the current calendar year, minus two years = 1/1/2017*)
   - **Thru Date**: **ye-1** (*indicating the end of the current calendar year, minus one year = 12/31/2017*)
5. Click **Search**.

   All protocols that were open *at some point* during that date range appear in your results. This includes

   - protocols that were open the entire time specified
   - protocols that were open prior to January 1st 2015 but closed during the specified time window
   - new protocols that opened for accrual between January 1st 2015 and December 31st 2016

6. Click **Back to Search**.

7. Clear your search selections using the **Clear** button at the bottom of the page.

8. In the **Status Change** field, select **Open to Accrual** from the drop-down list. In the corresponding date fields, enter the same date shortcuts:
   - **From Date**: **yb-1** (*indicating the beginning of the current calendar year, minus two years = 1/1/2017*)
   - **Thru Date**: **ye-1** (*indicating the end of the current calendar year, minus one year = 12/31/2017*)

9. Click **Search**.

   You will see fewer protocols in your search results. Now, only protocols that *changed to* **Open to Accrual** during that date range appear in your results.

Save a protocol search

You can save protocol search criteria to perform searches more efficiently. After you have developed and tested searches that you know you will use frequently, you can save the search to run it again without having to reenter all the search criteria.

NOTE: Any dates that have been entered as part of the saved search are saved as the calendar date and not a relative date. Date entries using shortcuts such as "yb" are not re-evaluated each time a saved search is selected**.**

1. Click **Back to Search** to return to the Protocol Search page.

2. At the top of the page, click the **Save As …** button.

3. In the pop-up window, type a name for your search in the **Name** field and click **Save**.

Your saved searches will be available in the drop-down list attached to the **Saved Searches** field (upper left corner). They will also appear in the **Saved Searches** widget on the Home page.

Share a protocol search

When creating a new saved search, you can share it with other users. To do so, click **Share** in the **New Saved Search** window and select the desired user(s) in the **Staff Name** multi-select field. The selected users will now see a link to the shared search in the Searches widget on their home screen.

Navigate back to your protocol search results

Sometimes the results page of a Protocol Search ends up like a “working list” of protocols that need your attention. For example, you might search for studies that currently have a status of **Manager Signoff** because they need **Department Head Signoff** next.

If you click on any protocol number in your search results page, the protocol will open in the PC Console.

1. Click **Search**. (Any criteria are fine.)
2. Click any **blue Protocol No.** hyperlink in the search results page.

   You are now in the PC Console and can make the appropriate updates to this protocol record.
3. Navigate to **Menu > Protocols > Protocol Search – Last Results**.

   You are returned to the search results page and can continue working on additional protocols in the list.

Using Document Search

Document Search allows you to easily locate protocol documents. Document Search locates files that have been attached in one of the following locations:

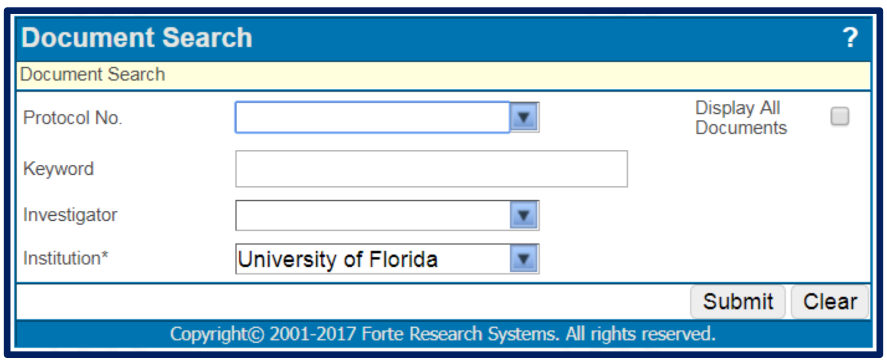
- PC Console > Documents/Info > Attachments tab
- IRB or PRMC/SRC Reviews (if the documents are marked as Released)
- PC Console > Institution > [institution] > Documents tab

NOTE: Document Search displays documents only from *active* protocols, that is, protocols with a status of **Open to Accrual, Closed to Accrual**, or **Suspended**. Documents associated with inactive protocols cannot be found using Document Search.

Conduct a document search

1. Navigate to **Menu > Protocols > Document Search**.

2. A pop up window appears:



3. Search criteria are entered into the pop up window - You can use any of the options, alone or in combination, to narrow results.

   Note: **Institution** is required; this field will default to the institution to which your contact record is associated. You can only select institutions to which you have access.

4. In the **Keyword** field, type **train** and click **Submit**.

   Searching for a keyword (such as “train”) will display protocols for which the word “train” appears in the **Title**, **Short Title**, or **Objectives** field.

By default, the Document Search Result page displays the most recent version of each type of document attached to the protocols returned by the search.

Remember that only protocols with an active status (**Open to Accrual**, **Closed to Accrual**, or **Suspended**) will appear in the search results.

5. Click any of the **File Name** links to download the .doc or .pdf files.

6. Scroll to bottom of the results page and click **Back**.

7. Select the **Display All Documents** checkbox.

   This checkbox will display *all versions* of each document type, in case you (or your end users) need to download an old version of a consent form or other protocol document.

8. Click **Submit**.

   If any of the document types have previous versions that have expired or been replaced by newer versions, those will now be visible and downloadable.

   The Expiration Date will appear in red for each expired document.

What documents can I see?

The documents that **do appear** in Document Search results include:

- Documents attached to IRB or PRMC reviews that have the **Released** checkbox selected
- Documents uploaded to the PC Console > Documents/Info tab
- Documents uploaded to the PC Console > Institution > [institution] > Documents tab

Documents uploaded to the following places **do not appear** in Document Search:

- Documents attached to tasks in a Task List
- Documents uploaded to the Coverage Analysis Console
- Documents uploaded to the Financials Console
- Documents uploaded to the Subject Console > Documents/Info > Attachments tab
- Documents attached to an organization record (an institution, lab, or IRB)

What security features affect Document Search results?

Search results are limited by *both* your organization access and the scope of your permissions.

Using Subject Search

Subject Search is a robust searching tool. This search option allows you to specify the search criteria and the kind of subject data to display in the search results. Search results can be exported to a PDF report or Excel spreadsheet.

Search for a subject

The Subject Search page provides dozens of data fields, allowing you to find one or more subjects based on a variety of search criteria.

Searching for subjects is an easy process: simply enter data into fields indicating the subject data you wish to match, and then click the **Search** button. Add additional search values to further refine your search.

1. Navigate to **Menu > Subjects > Subject Search**.

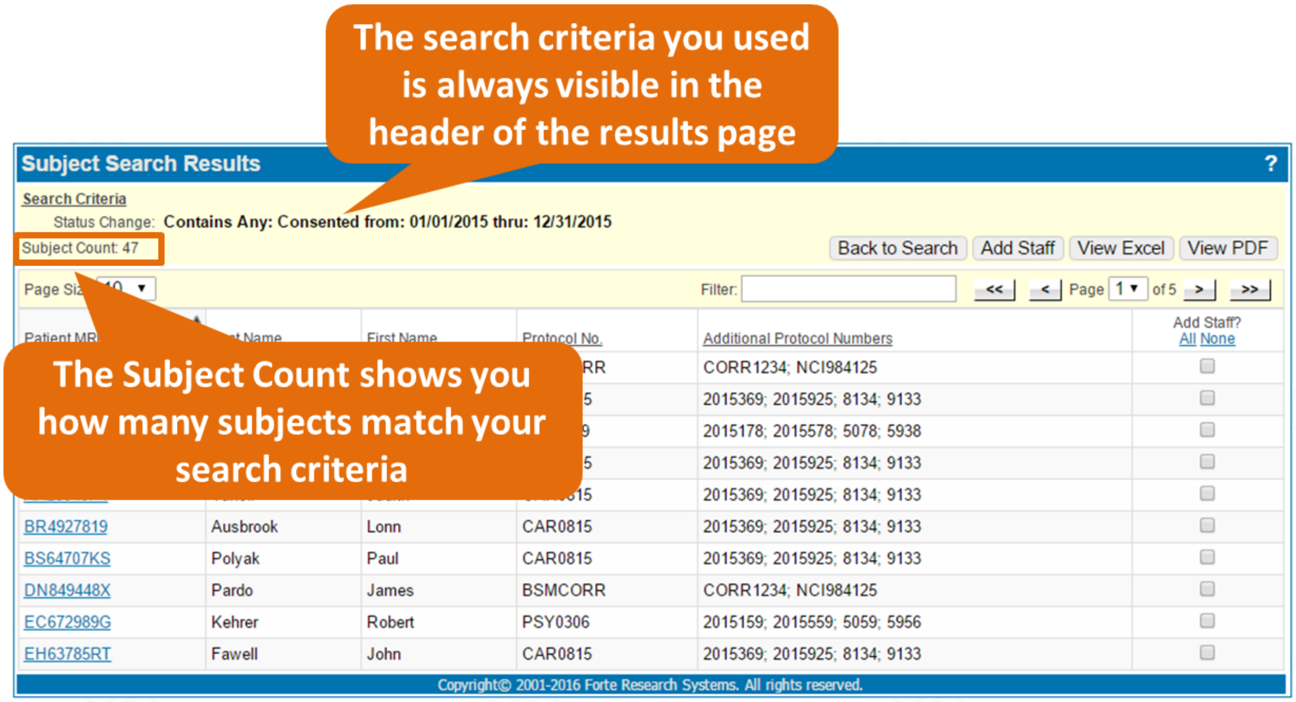
   Just like Protocol Search, the Subject Search tool provides dozens of data fields that can be used to create complex searches.

2. In the **Status Change To** field, select **Consented**.

3. Enter a **From Date** of **yb-1** and a **Thru Date** of **ye+1** to find subjects who consented to any protocol sometime last year.

4. Click **Search**.

   The Subject Search Results page opens. Note that the header at the top of the page lists the criteria used in the search, and the Subject Count displays the number of subjects found.



5. To refine your criteria, click **Back to Search**.

   Your initial search criteria are retained; add more criteria to narrow down your results.

6. In the **Status** field, select **On Study**.

7. Below the Status field, select the **Does Not Contain** radio button.

8. In the **Thru Date** field, enter **t** (today's date) to find consented subjects that have never had a status of On Study. Leave the From Date field blank.

9. Click **Search**.

   Fewer subjects are returned in your results. If these subjects have consented but do not have an On Study date, they don't count as accruals. Someone should probably follow up with these subjects…

Sort and filter your search results

There are several ways to customize your search results page:

1. Select a **Page Size** of 20 or 50 to see more results at once.

2. Click **Last Name** column header to sort the subjects alphabetically, A to Z.

3. Click **Last Name** column header again to sort the subjects Z to A.

   All of the column headers can be used to sort the results.

4. In the **Filter** text box, type **John** and press **Enter**.

   Now, only subjects with a first or last name containing “John” are visible.

5. Delete **John** from the Filter text box and press **Enter** to see all results.

6. Click **View Excel** to export the results to a spreadsheet.

Add more columns to your search results page

By default, each subject's MRN, last name, first name, and protocol(s) appear in the search results. You can add more columns to your search results page to see more details about each subject at a glance.

1. Click **Back to Search**.
2. Select the **Result Column?** checkbox for the **Race** and **Gender** fields.

   This will not limit your results; this will make additional information visible on your results page. Additional columns can be used for sorting and filtering, as well.
3. Click the blue **[+]** to expand the **Consent and Eligibility** section.
4. Select the **Results Column?** checkbox for **Eligibility Status**.
5. Click the blue **[+]** to expand the **Protocol** section.
6. Select the **Results Column?** checkbox for **Protocol Status**.
7. Click **Search**.

   The same number of subjects are returned in your search results, but now you can sort or filter on the protocol's status or the subject's eligibility status.
8. Click the **Eligibility Status** column header to sort the results.

   If someone is planning to follow up with these subjects and see if they are interested in joining a clinical trial, knowing which subjects have been deemed Not Eligible will be helpful.

Save a subject search

You can save subject search criteria to perform searches more efficiently. After you have developed and tested searches that you plan to use frequently, you can save the search to run it again without having to reenter all the search criteria.

NOTE: Any dates that have been entered as part of the saved search are saved as the calendar date and not a relative date. Date entries using shortcuts such as “yb” are not re-evaluated each time a saved search is selected**.**

1. Click **Back to Search** to return to the Protocol Search page.

2. At the top of the page, click the **Save As…** button.

3. In the pop-up window, type a name for your search in the **Name** field and click **Save**.

   Your saved searches will be available in the drop-down list attached to the Saved Searches field. They will also appear in the Saved Searches widget on the Home page.

Share a subject search

When creating a new saved search, you can share it with other users. To do so, click **Share** in the **New Saved Search** window and select the desired user(s) in the **Staff Name** multi-select field.

The selected users will now see a link to the shared search in the Searches widget on their home screen.

OnCore Reports

OnCore provides many **Standard Reports.** OnCore also allows technical staff to create and upload **Custom Reports.**

Review the Reports console

1. Navigate to **Menu > Reports > Reports.**

The left menu shows **groups** of available reports.
It defaults to "**All Groups**".

The right part of the screen lists individual reports by **group** and then by **Standard** vs **Custom**.

2. On the **right side** of you screen, click on one of the **blue [+].** This displays more details about that report. Notice that most **Standard Reports** have this detail.

Standard Reports

Run a sample Standard Report

1. Navigate to **Menu > Reports > Reports.**

2. Click the **Accrual Monitoring** group on the left menu. Notice that this filters the individual report list in the right – only accrual reports are listed.

3. In the **Standard Reports** section, click on the **blue [+]** next to the **Accrual for Investigator Initiated Protocols** link.

4. The description tells us this report will display the number of subjects that went On Study within a specified date range for each Investigator Initiated Protocol. Each protocol's Total Accrual Goal is shown, as well as the Research Organization and Affiliate accruals over the date range.

5. Now click on the **Enrollment Report** link.

6. Enter the following criteria:

    - **Organizational Unit**: Academic Health Center
    - **Management Group**: OCR Training & Education

7. Click **Submit**.

Enrollment Report ?

Search Criteria
Organizational Unit: Academic Health Center Management Group: AHC - Surgery

Protocol No.: OCR16262
Principal Investigator: Back, Martin Period Accrual: 1 Summary Accrual?: No
Title: A Prospective, Multicenter, Non-Blinded, Non-Randomized Study of the RelayPro Thoracic Stent-Graft in Subjects With an Acute, Complicated Type B Aortic Dissection

Total Enrollment Report

Ethnic Category	Sex/Gender			
	Females	Males	Unknown or Not Reported	Total
Hispanic or Latino	0	0	0	0
Not Hispanic or Latino	0	1	0	1
Unknown (individuals not reporting ethnicity)	0	0	0	0
Total	**0**	**1**	**0**	**1**

OnCore Enterprise Research

Custom Reports

Run a sample UF Custom Report

1. Navigate to **Menu > Reports > Reports** and click the **IRB** group on the left menu.

2. In the **Custom Reports** section on the right, click the **blue [+]** next to the **[UF] IRB Expiration Report** link.

3. The description tells us this report will display protocols which will expire within the defined number of days.

4. Now click on the **[UF] Continuing Review Report** link.

5. Enter the following criteria:
    - **Protocol No.**: OCRXXXXX

6. Click **Submit**.

IMPORTANT! Keep your OnCore data current!
This will become more and more critical as we start interfacing OnCore to other systems like Epic.

Scheduling Custom Reports

You can schedule a **Custom Report** to run at designated times. Every time a report is scheduled, OnCore creates a report scheduling record, monitors these records, and then runs the reports at the specified times.

Scheduling Options

Custom reports can be scheduled through the **Schedule** link next to the report name in **Menu > Reports > Reports**. You will need to enter criteria regarding the report output, where the output is to be sent, the format for the report, and the dates and times for the report. This criteria is entered in the following fields:

Schedule Name	Enter a descriptive *name* for the schedule. This name will be listed on the Reports > Scheduled Reports page. This is a required field.
Active	This checkbox is selected by default and is required to run the report at the designated time. Clearing this checkbox retains the scheduling record but prevents the report from running at the scheduled time.
Send to	This section defines the location of the report output. **E-mail**: Selecting the **E-mail** button directs the report output to an email address. To send the output to your email address, select the **My E-mail** checkbox. To direct the email to additional emails, enter the email addresses in the **Other E-mail** field, separated by semicolons. (If you do not want the email to be sent to your email, leave the My E-mail checkbox unselected.) Enter additional information to be included in the email in the **E-mail Subject** and **E-mail Body** fields.

OnCore file system: Selecting this option will direct the report file to be saved in the data/scheduled reports subdirectory of your JBoss server directory.

Format	Use the **Format** drop-down list to select the format of the report output. If the report will be sent via email, it will be included as an attachment.
Schedule	In the **Run at** field, select the hour that the report should run from the drop-down list. Reports can be run on a daily, weekly, or monthly basis. Selecting one of these buttons will provide additional options to further specify the recurring dates when the report will be run. **Daily**: Either every day or every weekday **Weekly**: The specific day of the week **Monthly**: The specific day of the month
Dates	Date fields allow you to specify when the report scheduling period begins and ends. These fields are also required. **NOTE**: Date criteria are calculated relative to the date the report is run.

Schedule a Custom Report

1. Navigate to **Menu > Reports > Reports**.

2. Select any Custom Report in the **All Groups** page and click the corresponding **Schedule** link.

3. On the **Report Schedule** page, enter the **Report Criteria** fields at the top of the page (varies by report), then the **Schedule Information** at the bottom to include:

   - **Send To** info
   - **Format** choice
   - **Schedule - "Run at**" time, **Daily/Weekly/Monthly**, and period details
   - **Dates –** Start and End Dates

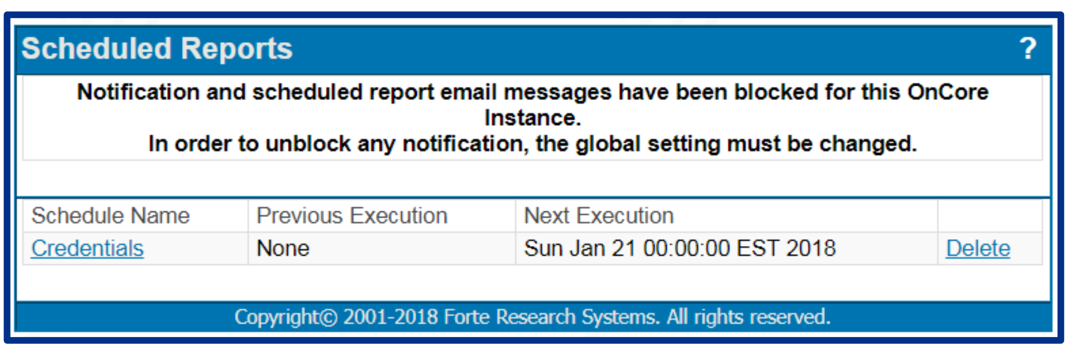
4. Click **Submit**.

5. Navigate to **Menu > Reports > Scheduled Reports** to view the schedule you created.

Delete a Scheduled Custom Report

1. Navigate to **Menu > Reports > Scheduled Reports**

2. Select any scheduled report on the **Scheduled Reports** page.



3. Click **Delete**, then click **OK** to confirm.

Run additional protocol-related Custom Reports

Interested in seeing more reports that utilize the data you've entered so far in the PC Console? Try running the following OnCore reports**. Remember that not all search criteria are required.**

1. Subject Management > [UF] Subject Enrolled Studies Report
   a. **Subject MRN**: E0000001
2. Administrative > [UF] Expired Credentials Report
   a. **Institution:** University of Florida
3. Pre-Screening > [UF] Protocol Screening Summary
   a. **Protocol No.**: OCRXXXXX
4. Accrual Monitoring > [UF] Accruals by Date Range and Management Group with Screen Failures
   a. **From Date**: t-150
   b. **Through Date**: t
   c. **Management Group**: OCR – Training & Education

Need a New Custom Report Created?

In production, if you think you need a new Custom Report,
*please complete an "**Other Support Requests**" request via the OnCore Support webpage at*
http://clinicalresearch.ctsi.ufl.edu/oncore/support/other-support-requests/

How to Get Help

OnCore Intranet Website

- https://ctsi-clinicalresearch-intranet.sites.medinfo.ufl.edu/
- Includes web-based user guides, tip sheets, videos, OnCore Dictionary, and Support Desk Information.
- For computers not on the UF Health Science Center network, VPN access is required.

OnCore User Guides

- UF OnCore User Guides
- For computers not on the UF Health Science Center network, VPN access is required.

OnCore Support Desk

- Phone: (352) 273-5924
- Email: OnCore-Support@ahc.ufl.edu

OnCore Online Help Desk Ticket System

The UF OnCore support webpages provide a way for UF OnCore users to easily create trackable help desk tickets for:

- Adding or Updating Staff Contacts in OnCore
- Requesting an OnCore User Account
- Other Support Requests (technical support, report requests, etc.)

OnCore Support Consults

The UF OnCore support staff love to work “face-to-face” with new UF OnCore users, especially when they need help with their first “real study”. Our most popular consults involve showing new users how to:

- Review the protocol calendar and budget
- Enter an IRB review
- Upload approved study consents
- Open the study to accrual
- Register new subjects
- Check-in visits
- Enter visit variations and deviations

To schedule a consult, please complete the Request an OnCore Consult form.

OnCore Enterprise Research