Description: The OnCore system has many different pages that you can use to view and enter data into the system. Depending on what page or console you are using, the format of the menus can vary. This user guide covers the most commonly used menu formats and navigation strategies.

THE HOME SCREEN

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

THE HEADER MENU BAR

The OnCore Menu Bar appears at the top of every OnCore page. It provides links to your most frequently used tools.

- **OnCore Logo** - Returns you to the home page from anywhere in OnCore.
- **Main Menu** - Contains all menus and menu items that you have permission to see.
- **Favorites Bar** - Contains links to menus and menu items that you have marked as favorites. The links can be customized and rearranged to suit your needs (see the Set Up Your Favorites Bar user guide).
- **Environment** - The red environment box shows you which OnCore environment you are logged into. At UF, there are several OnCore environments, including:
  - **Production** - “Live” system used by researcher teams
  - **Training** - Used by OnCore Training Staff and Classes
  - **Testing** - Used by OnCore Support Staff
  - **Staging** - Used by OnCore Support Staff

  Note: If you look closely at the background wallpaper on your OnCore screens, you will see a “watermark” that also tells you which OnCore environment you are in.

- **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.
- **Current User** - While you are logged into OnCore, your name will display in the top right corner.
- **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 (see the Set Up Home Screen Widgets user guide).
THE USER MENU

In the upper right corner of your screen, click the drop-down arrow next to your name to open the User Menu. This menu contains various links and tools, including a customized Help menu that has links to UF OnCore help web pages:

- UF OnCore Support
- UF OnCore User Guides
- UFOnCore Classes

CONSOLES

A console is a set of related pages for a particular workflow, function, access/user role, or type of data. Some examples:

- 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.
- 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.

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.

Each console has a header area that displays data that helps identify which record you are in.

Not all OnCore user roles can see all consoles. In addition, some user roles might only have “View Only” access to certain consoles.

Consoles that you have permission to use are accessed through the Main Menu. For example, to navigate to the PC Console:

1. Click on the blue Menu in the header menu bar.
2. In the resulting drop-down, hover on Protocols.
3. In the resulting drop-down, click on PC Console.

This action is described using the phrase “Navigate to Menu > Protocols >PC Console”.

You can easily select your most-used consoles from the main Menu and add them to the middle of menu bar to create a “favorites” bar (see the Set Up Your Favorites Bar user guide).
EXPLORE THE PC CONSOLE

1. Navigate to **Menu > Protocols > PC Console**.
2. The PC Console opens, allowing you to select a protocol.

3. All protocols in OnCore are identified by an alphanumeric **OnCore Protocol Number**. At UF, you will be able to search for your study using any of the following identifiers:
   - **OnCore Protocol No.** *(e.g. OCR12345)*
   - **Short Title**
   - **IRB No.**
   - **PRMC No.** *(Cancer studies reviewed by the Scientific Review and Monitoring Committee only)*
   - **Sponsor Protocol No.**
   - **FDA IND No.** *(IND drug studies only)*
   - **FDA IDE No.** *(IDE device studies only)*
   - **UF “Nickname”** *(See Note below)*

Note: UF “**Nickname**” *(aka Short Name)* is not a separate OnCore field. If desired, you can add your study nickname to the unused **Pharmacy No.** field in the **PC Console > Main > Management tab**. This will enable you to use the nickname as an additional searchable identifier.

Technically, OnCore can also search for a study using the following fields, but these fields are not required at UF, so they may not have any data in them, or they might be used in different ways by different UF managements groups:
   - **Pharmacy No.**
   - **UF CRC No.**
   - **Contract No.**
FIND-AS-YOU-TYPE FIELDS

The Select Protocol field is an example of an OnCore find-as-you-type field. Typing an entry in this field prompts OnCore to immediately display a list of potential protocols as soon as it matches a part of your entry. 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 or any other searchable identifier.

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.

DROP-DOWN BOXES

Many fields in OnCore have blue arrows on the right side. When you click on the blue arrow, a drop-down menu appears for you to select a value from.

Note: Drop-down menus with blue arrows do not always show all options.
For large drop-down menus, you will need to use the "find-as-you-type" method to filter the values shown.
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 AND HORIZONTAL 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 configuration of the protocol’s treatment steps and arms.

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 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 will be discarded.

OnCore does **NOT** have an autosave function. If you are entering many data points on a particular OnCore page, click [Save] or [Submit] periodically to save your work.

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 below, after selecting a role and a staff member, you must click [Add] to assign the staff member to a protocol:

![Add Block Example](image)

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 inquiry mode on the Staff tab.