

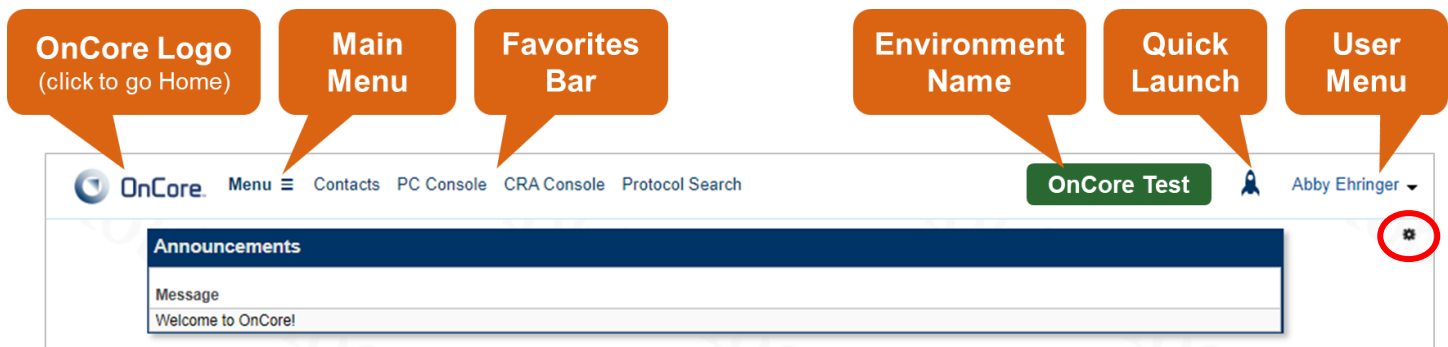
**Description:** The OnCore system has many different pages that you can use to view and enter data into the system. Depending on what page or console you are using, the format of the menus can vary. This user guide covers the most commonly used menu formats and navigation strategies.

## 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

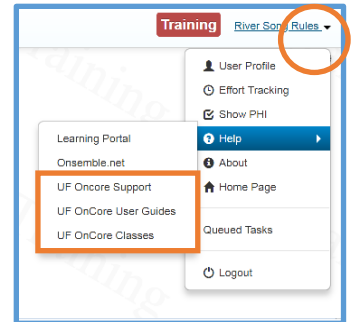
Note: If you look closely at the background wallpaper on your OnCore screens, you will see a “watermark” that also tells you which OnCore environment you are in.

- 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.
- **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.



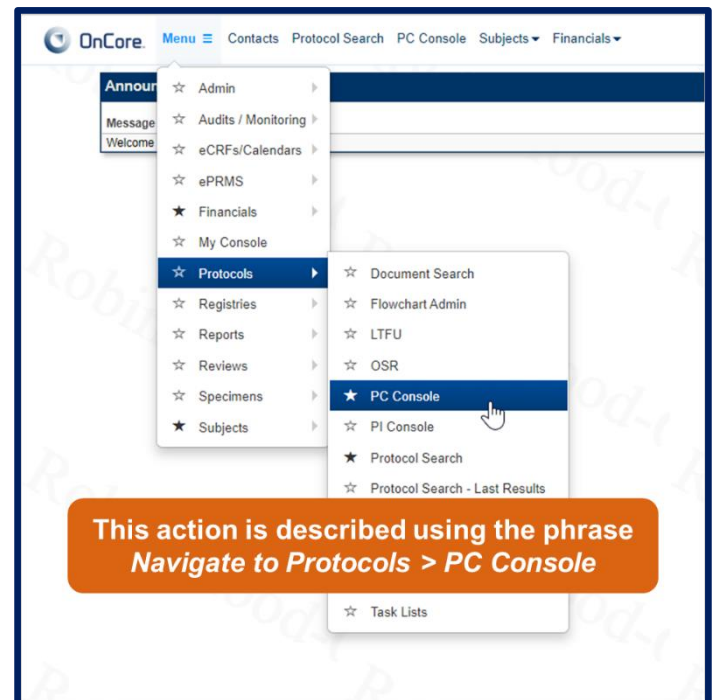
**Not all OnCore user roles can see all consoles. In addition, some user roles might only have "View Only" access to certain consoles.**

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

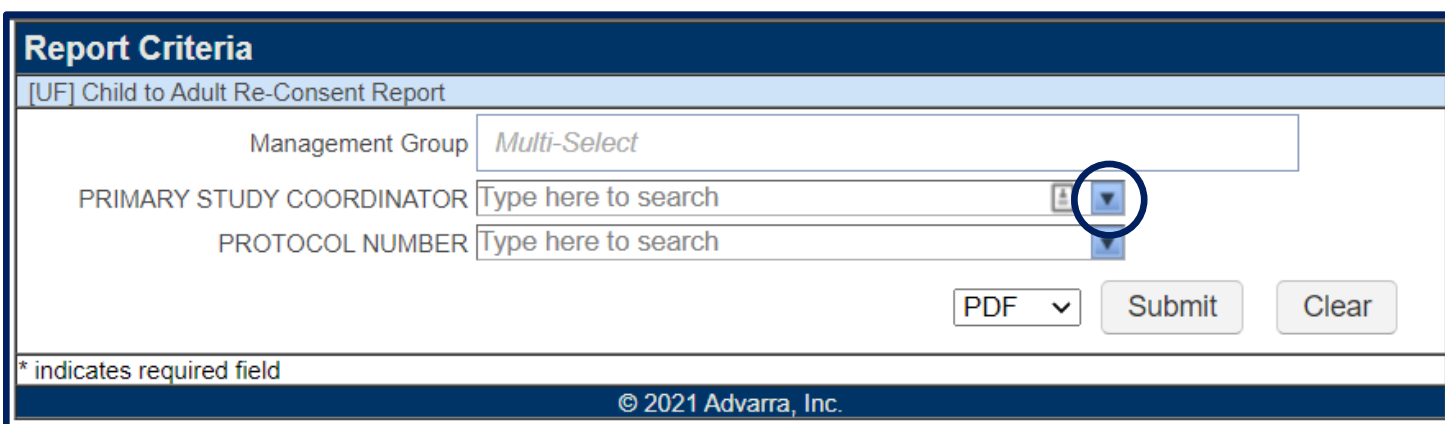
The **Select Protocol** field is an example of an OnCore *find-as-you-type* field. Typing an entry in this field prompts OnCore to immediately display a list of potential protocols as soon as it matches a part of your entry. This field can be used to help you locate your protocol by limiting the number 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.

Click the ★ to bookmark this protocol

Click the question mark to access the Learning Portal

★ PC Console
?

Protocol No.: CAR0815	Library: Cardiology	PI: Wallenstone, Ben	Sponsor: Bayer Healthcare Pharmaceuticals, Inc.
Protocol Target Accrual: 50	Accrual To Date: 18	Protocol Status: OPEN TO ACCRUAL	
RC Total Accrual Goal (Upper): 60	IRB Expiration: 09/27/2020		

## 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.

★ PC Console
?

Protocol No.: CAR0815	Library: Cardiology	PI: Wallenstone, Ben	Sponsor: Bayer Healthcare Pharmaceuticals, Inc.
Protocol Target Accrual: 50	Accrual To Date: 18	Protocol Status: OPEN TO ACCRUAL	
RC Total Accrual Goal (Upper): 60	IRB Expiration: 09/27/2020		

Select Protocol  
 CAR0815

Main

Treatment

Institution

Accrual

Status

Reviews

Documents/Info

Details

Management

Staff

Sponsor

IND/IDE

ClinicalTrials.gov

Protocol Details

History

Protocol No.	CAR0815	NCT Number	NCT00178620
Library	Cardiology	Department	Cardiology
Organizational Unit	Medical Center		
Title	PATCAR Pilot Trial: A Phase 4 Study, Pre-hospital Administration of Thrombolytic Therapy With Urgent Culprit Artery Revascularization		
Short Title	Pre-hospital Administration of Thrombolytic Therapy With Urgent Culprit Artery Revascularization		
Objectives	The PATCAR study has been designed to test the hypothesis that the strategy of pre-hospital use of a "clot busting" (thrombolytic) drug followed with emergent heart catheterization including stenting of the problematic coronary artery, will result in a lower mortality and reduced repeat heart attack rates.  Early identifying and treating heart attacks patients prior to the arriving at the hospital, in those patients who qualify for the "clot busting" drugs will lower the size of the heart attack damage. This smaller heart attack will lead to fewer problems with less repeat heart attacks and death in the future.		
Phase	IV	Scope	National
Age	Adults	Consent at Age of	N/A

Need Help? Contact **UF OnCore Support Team** [OnCore-Support@ahc.ufl.edu](mailto:OnCore-Support@ahc.ufl.edu) (352) 273-5924

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## 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:

**Choose a Role and the Staff Name, then click Add**

Role	Last Name	First Name	Middle Name	Organization	Edit	Select
Principal Investigator	Applewood	Grace		The Research Institute	Edit	<input type="checkbox"/>
Clinical Trial Coordinator	Austin	Chad		The Research Institute	Edit	<input type="checkbox"/>
Protocol Creator	Dooley	Angela		The Research Institute	Edit	<input type="checkbox"/>

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.