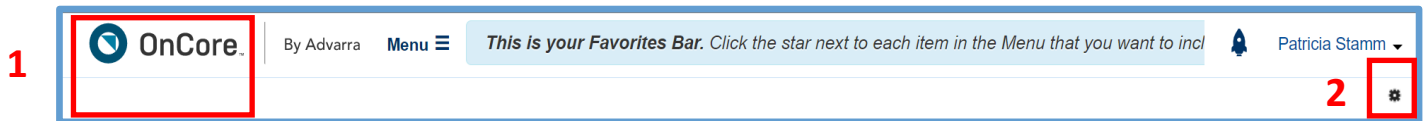


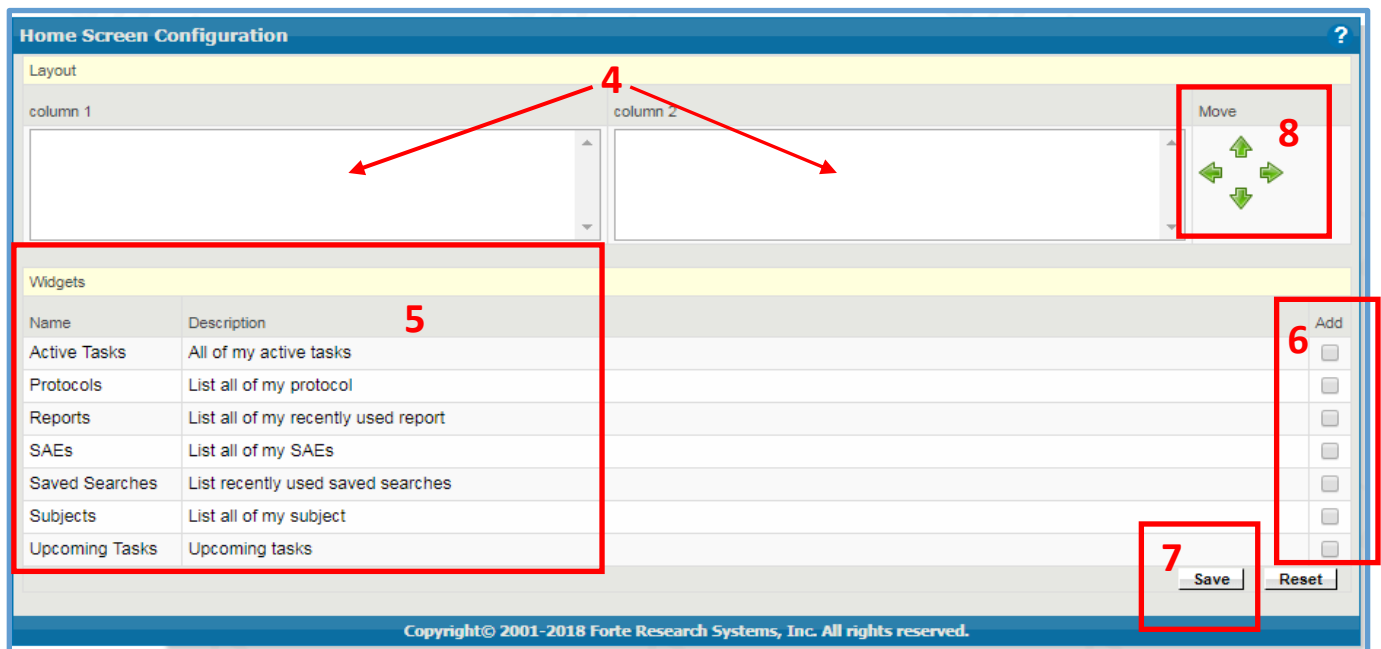
Description: Users can set up their home screen to display relevant protocols, subjects, and events in “widgets”. The information and links in each widget are configured by each user. You only need to set up widgets once, but you can always revise them later to suit your needs. This tip sheet provides instructions on how to set up widgets.

ADD WIDGETS TO THE HOME SCREEN

1. Ensure that you are on the **Home Screen** by clicking on the **blue OnCore logo** in the top left corner.



2. Under your user name in top right corner, click on the **very tiny gear icon**.
3. The **Home Screen Configuration** page will open.

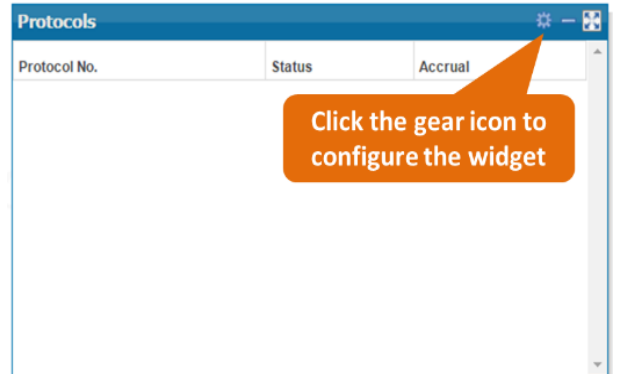


4. Any widgets that have already been added to the Home Screen are shown in the column 1 and column 2 boxes at the top.
5. Widgets that can be added to your homepage are listed at the bottom of the page.
6. Select the **[Add]** checkboxes for any additional widgets you want.
7. Click **[Save]**.
8. To change the order of position of the widgets, click any widget in column 1 or column 2 and use the green arrow buttons to move the widget up or down, or to a different column.
9. Click **[Save]**.
10. Click the blue **OnCore logo** in the top left corner to navigate back to the Home Screen. Note: When you first add the protocols and subjects widgets to your home page, they will be blank. You will need to configure them to display items (see next section).

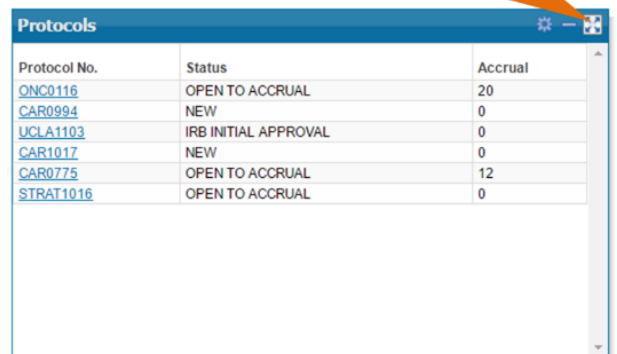
CONFIGURE THE PROTOCOLS AND SUBJECTS WIDGETS

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 blue [Please select a role](#) or [Edit role\(s\)](#) hyperlink.
5. In the pop-up window, select the checkboxes for **ALL roles** listed and click **[Save]**.
6. Select the **Pending**, **Active**, and **Terminated** checkboxes, then click **[Save]** again to return to your home page.

The Protocols widget now displays any study that has you listed as a staff member.



Click the expand icon to see more information about each protocol

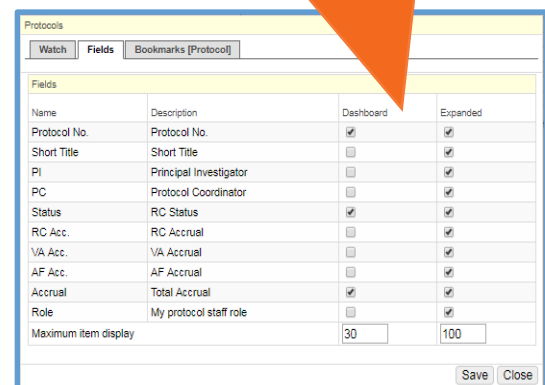


7. Click the expand icon in the header of the protocols widget to see more information about the protocols in your widget.
8. Click **Close** to return to the regular view of your home page.

By default, the **Protocol No.**, **Status**, and **Accrual** fields appear for each protocol included in your widget. You can customize the information that appears in your “dashboard view” and your “expanded view.”

9. Click the **gear icon** in the header of the protocols widget.
10. Click the **Fields** horizontal tab.
11. Select the checkboxes for the fields you would like to see in your dashboard view and in your expanded view, then click the **[Save]** button.
12. The fields selected are now visible in your widget.

Select the checkboxes for fields you'd like to see



- ❖ Similar steps can be used to configure your **Subjects** widget.
- ❖ Your personal settings will not affect any other OnCore users.