VERSION 15 UPGRADE HIGHLIGHTS

Description: In the fall of 2017, UF will be upgrading from OnCore version 14.1 to version 15.2. This tip sheet outlines some of the changes that end users may experience with this upgrade.

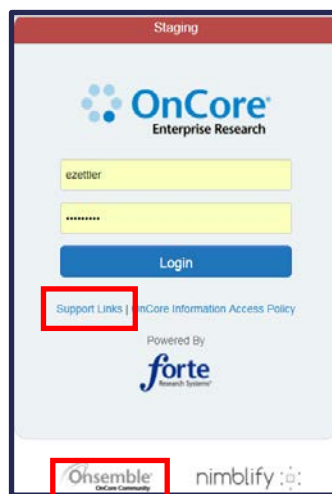**Audience**: Current UF OnCore end users.

OVERVIEW OF CHANGES

End user workflows and consoles are not changing in OnCore version 15; the main changes focus around administrative features, such as the transition from "staff" records to "contact" records. End users will experience a new look and feel, particularly in the navigation and menus. Changes include:

1. A cleaner, brighter look and **color scheme**.

2. You can now use the **Back Button!** Note: Occasionally, you may still get an error message; you can clear the error message by refreshing the page URL in your browser.

3. UF auto-generated protocol numbers will now have **OCR** at the beginning followed by 5 digits: e.g. **OCR16517**

4. Updated **Login Screen** (more detail below).

5. **Home Page** changes (more detail below):

    o **Stacked Access Roles** – No toggling necessary.

    o **Main Tool Bar** has been replaced by a **Menu** and customizable **Favorites Bar.**

    o A **red color badge** and **watermark** indicate which OnCore environment you are using.

    o The **About, Home**, **Help, Profile, and Logoff** links have been placed under a new **User menu.**

    o The **OnCore logo** can now be clicked as a **Home button**.

    o You may need to reset your home page **widgets**.

6. **Sorting and Filtering** for various lists is easier (example below).

7. For protocols that involve other organizations (e.g. additional sites or affiliates), study teams can expand **Access to Subjects** for a protocol staff member to include subjects at the other organizations (more detail below).

8. Some **Terminology** changes (more detail below).

LOGIN SCREEN

You will first notice the new look and feel of version 15 on the **login screen**, where you now have direct links to **Onsemble.net** and other **Support Links**.

STACKED ACCESS ROLES

OnCore users are assigned **access** based on the tasks they need to complete in OnCore. The most frequently assigned roles are:

- PC – Protocol Coordinator
- FC – Financial Coordinator
- CRA – Clinical Research Administrator (Study Coordinator)

Some users are assigned multiple roles. OnCore 15.0 introduces the concept of **stacked roles**; user access is cumulative based on all of the access roles in each user's record. With this change, users have all the access they need as soon as they log in to OnCore without needing to toggle between roles.

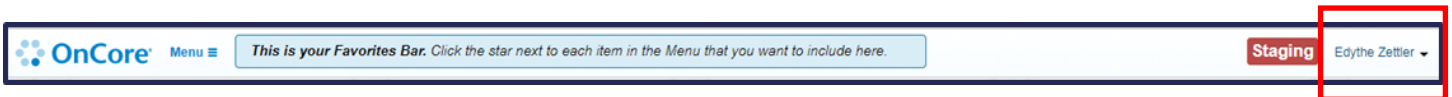This change is reflected in the main tool bar:

Version 14
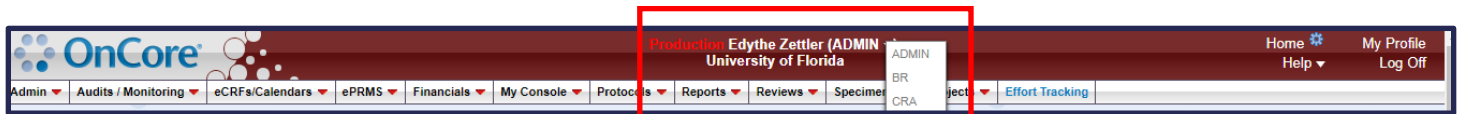
In v14, the main tool bar automatically displayed menus and menu items based on the role you were "toggled" into. The end user could not customize this tool bar.

Users with multiple roles had to "toggle" between roles in order to see role-related menus and pages.

Version 15

In v15, the main tool bar is now split between a **Main Menu** drop-down and a **Favorites Bar**.

The **Main Menu** contains a combination of all of the menus and menu items needed for all of your assigned roles.

The **Favorites Bar** is configurable by you.

Toggling is no longer needed in order to see all of your role-related menus, menu items, and pages.

VERSION 15 UPGRADE HIGHLIGHTS

UF OnCore Tip Sheet

Version 10/30/17

NEW MENU AND FAVORITES BAR

From the new **Main Menu**, you can choose the menu categories and items you use most and add them to your **Favorites Bar,** so they're always close at hand. You can also rearrange your menu options to put them in the order that makes the most sense for your workflows.

After the upgrade, the first time you login, the main tool bar will look similar to this:
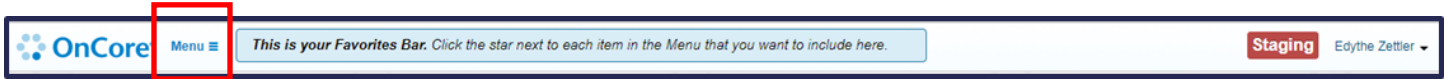
To customize your **Favorites Bar**, do the following:

1. Click on the **Menu.** All items that you have access to now appear in **Menu.**
2. To add an entire menu category, click the **star** next to the category.
3. If you only want to add single menu item, click the star next to that single item.
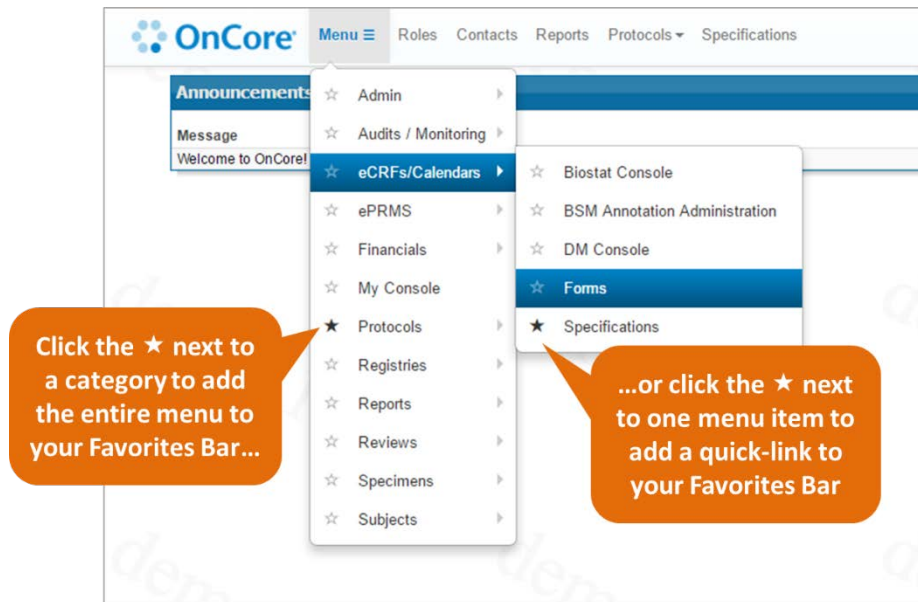

4. Once the menu categories and/or menu items are in your **Favorites Bar**, you can reorder menus and menu items by drag and drop. Try it!
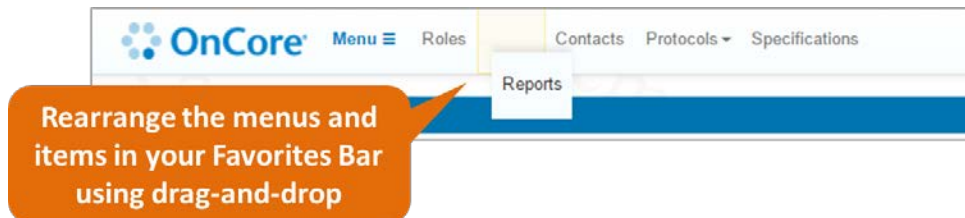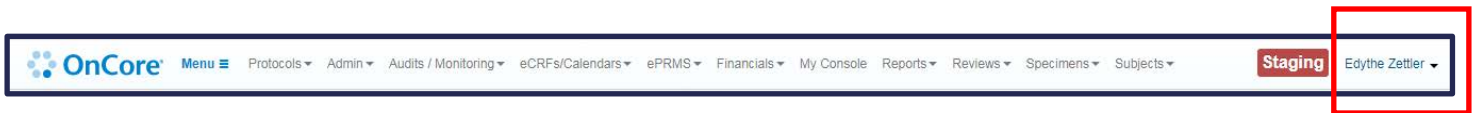
ONCORE ENVIRONMENT INDICATORS

Sometimes users may need to sign into different OnCore environments (e.g. "Production" vs. "Training"). In version 15, a text **watermark** and red **color badge** give you a quick way to identify the environment you are currently in:
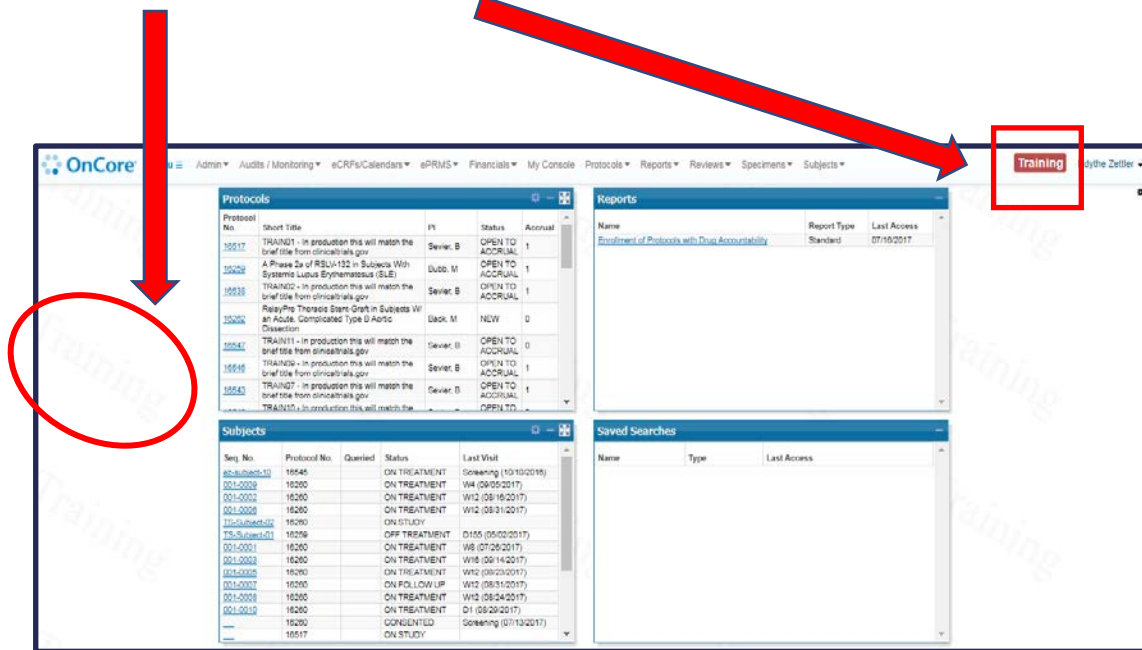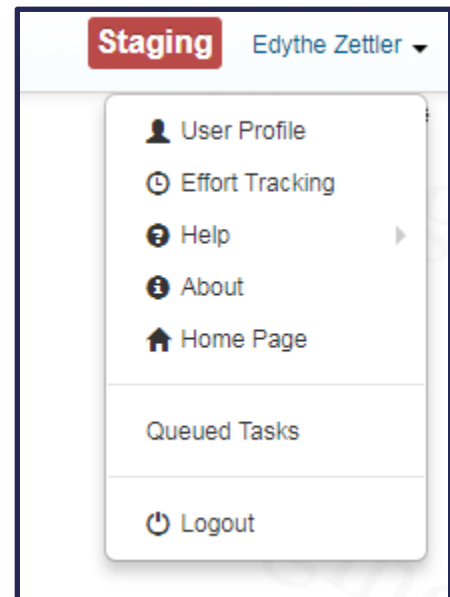
USER MENU

The new **User Menu** provides quick access to things that matter to you.

When you click on your **user name** in the main tool bar, you will see a drop-down menu that includes links to:

- User Profile
- Effort Tracking
- Help
- About
- Home Page
- Logout

This **User Menu** is configurable by UF, so you may also see links to UF-specific resources such as the UF OnCore Support Helpdesk, UF OnCore website, UF Tip Sheets, etc.

WHERE DID THE HOME BUTTON GO?

As discussed above, you can access the **Home Page** through the new User Menu, but a quicker way to is to simply click on the blue **OnCore logo** on the far left of your main tool bar.

WHERE ARE MY WIDGETS?

You may have to re-set your home page widgets after the upgrade. If you need help setting them up, please refer to the Set Up Home Page Widgets **tip sheet** available on the UF OnCore webpage clinicalresearch.ctsi.ufl.edu/oncore/training/tip-sheets/

or email the UF OnCore Support Team at *OnCore-Support@ahc.ufl.edu*.

VERSION 15 UPGRADE HIGHLIGHTS

SORT AND FILTER ON "LANDING PAGES"

OnCore 15 provides more "landing pages" with enhanced sorting and filtering capabilities. A landing page shows you all of the records you have access to and gives you options to quickly find what you're looking for. Let's look at one:

1. Navigate to the **Admin > Contacts** page.

2. Notice the following:
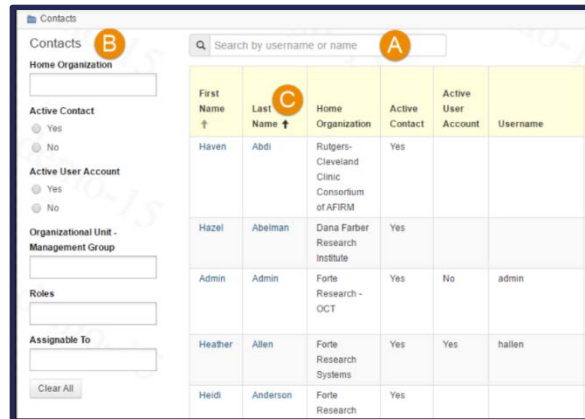
    A.   There's a **search box** directly at the top of the page for basic filtering
    B.   There are more **advanced filtering options** in the left pane.
    C.   In the table, you can **sort** the record list in multiple ways by clicking the column headers.

3. Try finding your own contact record.

4. After you've found the record you're looking for, notice you have more navigational tools to help you efficiently complete your tasks:
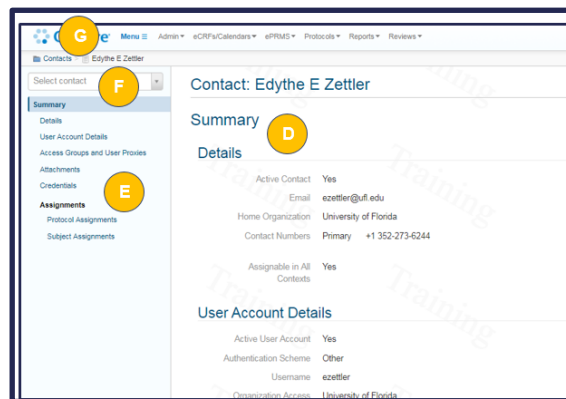
    D.   An at-a-glance **Summary** section displays the most relevant information.
    E.   The left pane lets you **jump to the sections** that matter for your task at hand.
    F.   The **quick switch control** gives you fast access to other records while maintaining your location and context-specific filters. This is useful when you need to, for example, check the credentials or access settings for a handful of users all in one sitting.
    G.   Additionally, as you make your way through the system, the **breadcrumb trail** at the top of the page lets you know where you are and where you've been. With one click, you can navigate your way back to other parts of the trail.

ACCESS TO SUBJECTS

Access to subjects for a given protocol is no longer granted by the **staff roles** assigned in the PC Console > Staff tab. Instead, access is determined by the settings in the individual's contact record (set up by OCR per your supervisor's initial access request for you). For protocols that involve other organizations (e.g. additional sites or affiliates), expanded access to subjects at these other organizations can be added by study teams at the protocol level. Two new filters can be used to view/hide these granular access assignments.

To **view** current staff organizational access information:

1. Navigate to **PC Console > Staff** tab.

2. Click new filter checkbox for **View Staff Organization Access.**

- o **Organization** column lists the default Organization assigned in this person's Contact record.
- o **Protocol Organizational Access** column lists the subjects each staff member can currently access on this particular protocol.

To **add** additional subject access to a staff member for this protocol:

1. Click Edit for the staff member.

2. Select the additional organizations from the drop-down under the **Additional Protocol Access** column. Note: If there no other organizations or sites applicable for this protocol, this drop-down will be blank.

3. Click the "Yes" radio button under "Can Access All Protocol Organizations"

To **filter** out Affiliate access information:

1. Click new filter checkbox for **Hide Affiliates**

TERMINOLOGY CHANGES

In addition to the updated look and feel, OnCore Version 15 includes some terminology changes. Here are some examples:

Before Version 15.0	Version 15.0 and Beyond
"Access Roles"	"Roles"
"Privileges"	"Permissions"
"Staff" *	"Contacts"
"Institutions"	"Organizations"

*Note: The term "Staff" is still used in the context of Study "Staff" that the study team specifically assigns to a study protocol and/or a study subject.

HOW TO GET HELP WHEN USING ONCORE VERSION 15

THE HELP MENU AND ONCORE LEARNING PORTAL

1. In the User Menu, click on **Help.**

2. Click on **Learning Portal**.

3. This will take you to the **OnCore Learning Portal** webpage which includes links to information about:

   - Documentation
   - Training
   - Database Views
   - Webinars
   - Release Notes
   - Workflows
   - Menu-specific contextual help
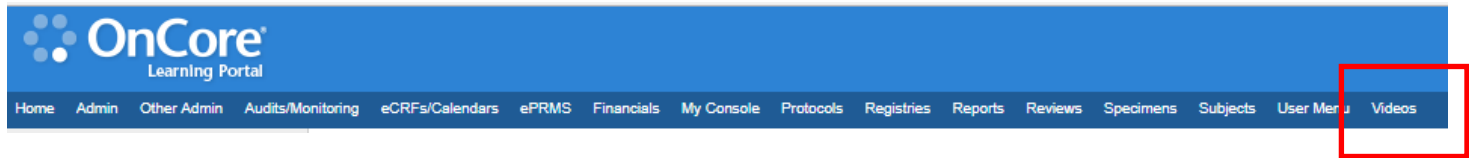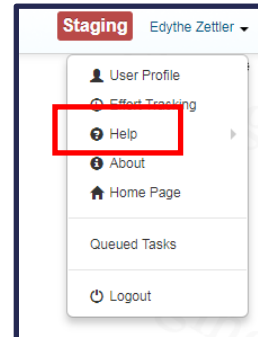
Forte has developed several brief introductory videos that demonstrate some of the changes in Version 15. To access the videos:

1. Click the **Videos** link on the **OnCore Learning Portal** main tool bar.

2. You should end up on https://docs.onsemble.net/index.php/Videos. The **OnCore 15.0 Upgrade Short Videos** are the first videos on this page.

   We recommend the following v15 videos for end users:

   - Customize Your Favorites Bar

   - Sorting and Filtering

   - Assign Staff to a Protocol

   We do **NOT** recommend the following v15 videos for end users; the content was mainly developed for OnCore Support staff:

   - Create a Contact Record
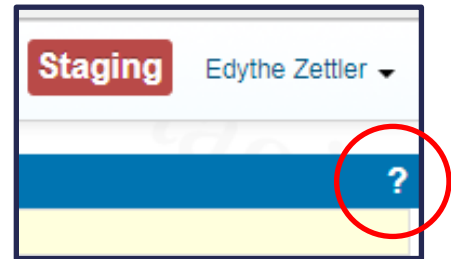
   - Create a Testing User

CONTEXT SENSITIVE HELP WITHIN ONCORE

Just like in Version 14, most screens in OnCore have context-sensitive help which is easily accessed by clicking the **"?"** button in the upper right-hand corner under your user name.

This will display detailed information about the current screen and its contents.

Note: The detailed information will be the Forte default information about this page. There may be slight variations on how the page is used by UF.

UF-SPECIFIC HELP LINKS

- UF OnCore **Webpage** http://clinicalresearch.ctsi.ufl.edu/oncore/
- UF OnCore **Tip Sheets** http://clinicalresearch.ctsi.ufl.edu/oncore/training/tip-sheets/
- UF OnCore Training **Classes** http://clinicalresearch.ctsi.ufl.edu/oncore/training/classes/
- UF OnCore **Support Desk** OnCore-Support@ahc.ufl.edu

VERSION 15 DEMO SESSIONS

During November 2017, the UF OnCore support team will offer several brief sessions of a hands-on review and **demo of this tip sheet.** To register, please check the UF OnCore Training Classes webpage for the class **OCR809 Hot Topics-Version 15**