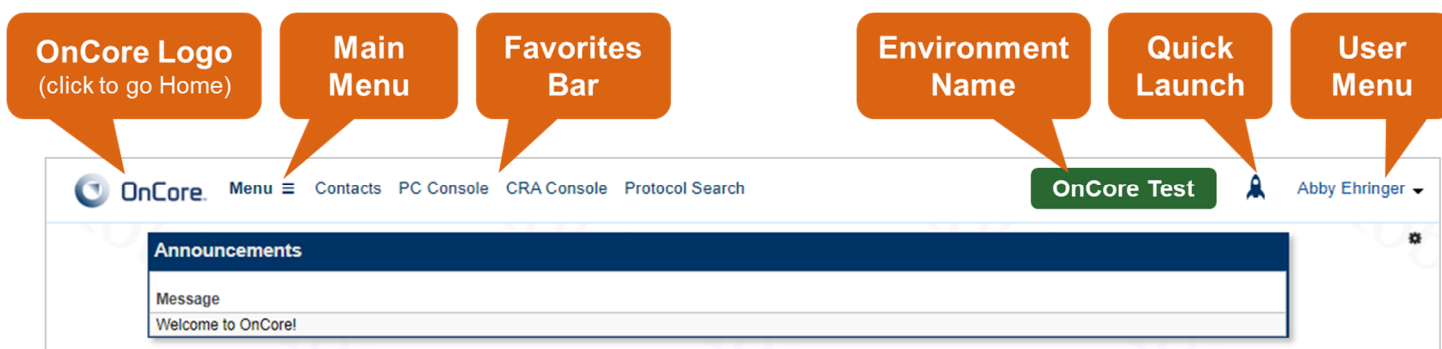


OnCore Navigation

The OnCore Menu Bar provides links to your most frequently used tools. The links on your Favorites Bar can be customized and rearranged.



Clicking the **OnCore logo** returns you to the Home page.


The main **Menu** contains all pages and consoles that you have permission to see (e.g., PC Console or CRA Console).

The **Favorites Bar** appears under the header. It contains menus and menu items that you have permission to see (such as the PC Console).

The **environment name** is displayed in a configurable colored badge.

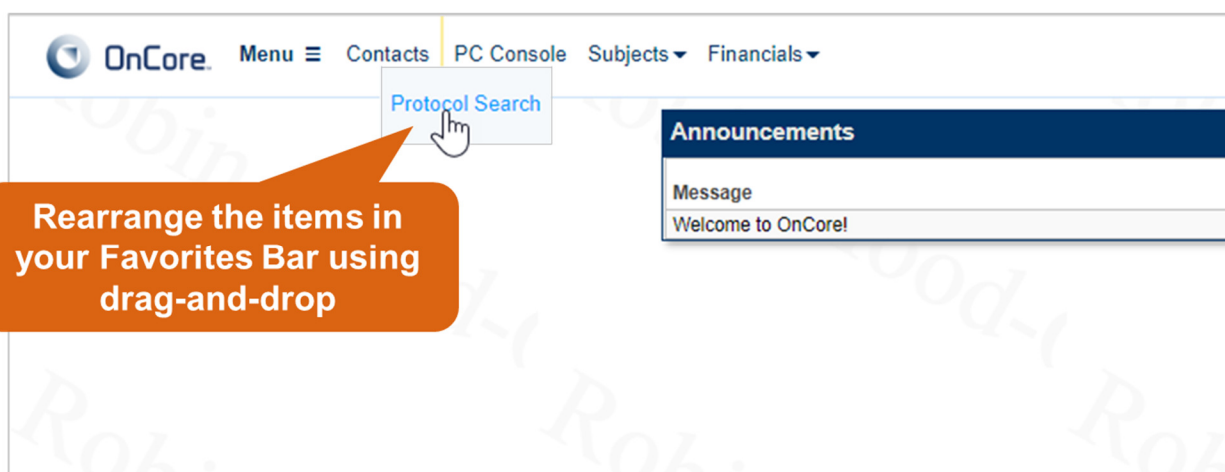
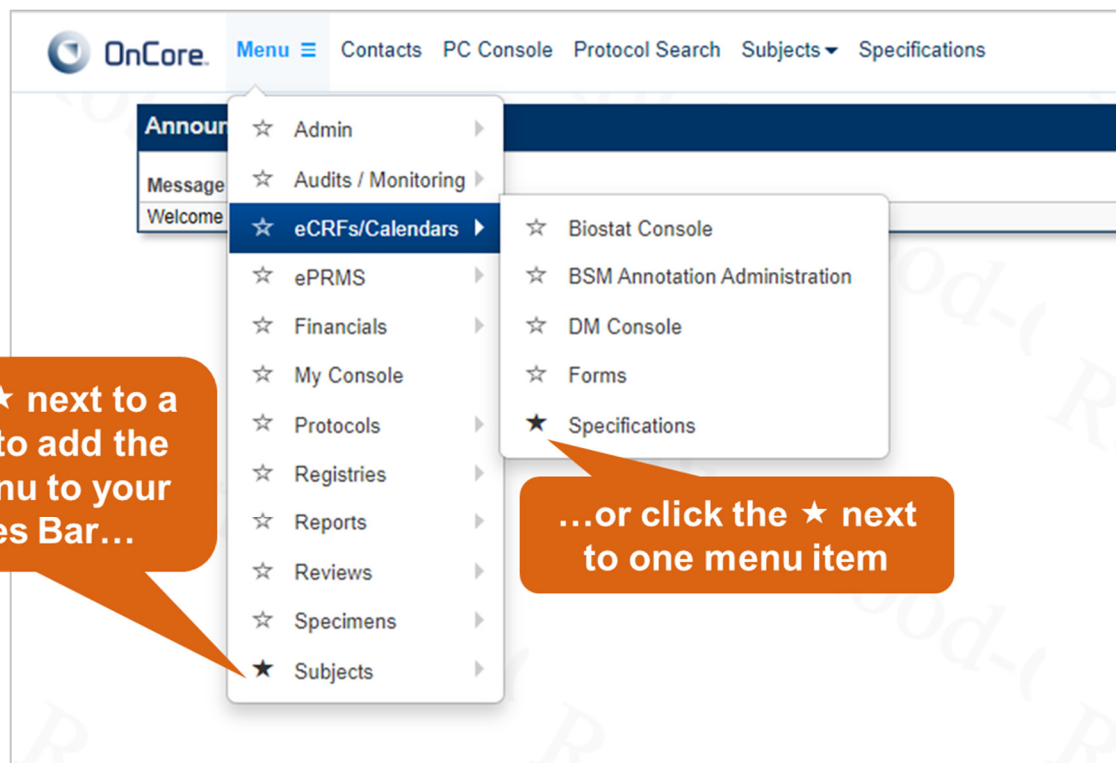
The **Quick Launch** icon provides the user access to OnCore pages using the keyboard. Click the rocket ship or type CTRL+K (Windows) or CMD+K (Mac) to open the Quick Launch tool.

The **User Menu** in the top right corner provides access to Help links (such as the Learning Portal), the Effort Tracking module, and user actions such as resetting your PIN.

The **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.

The Favorites Bar

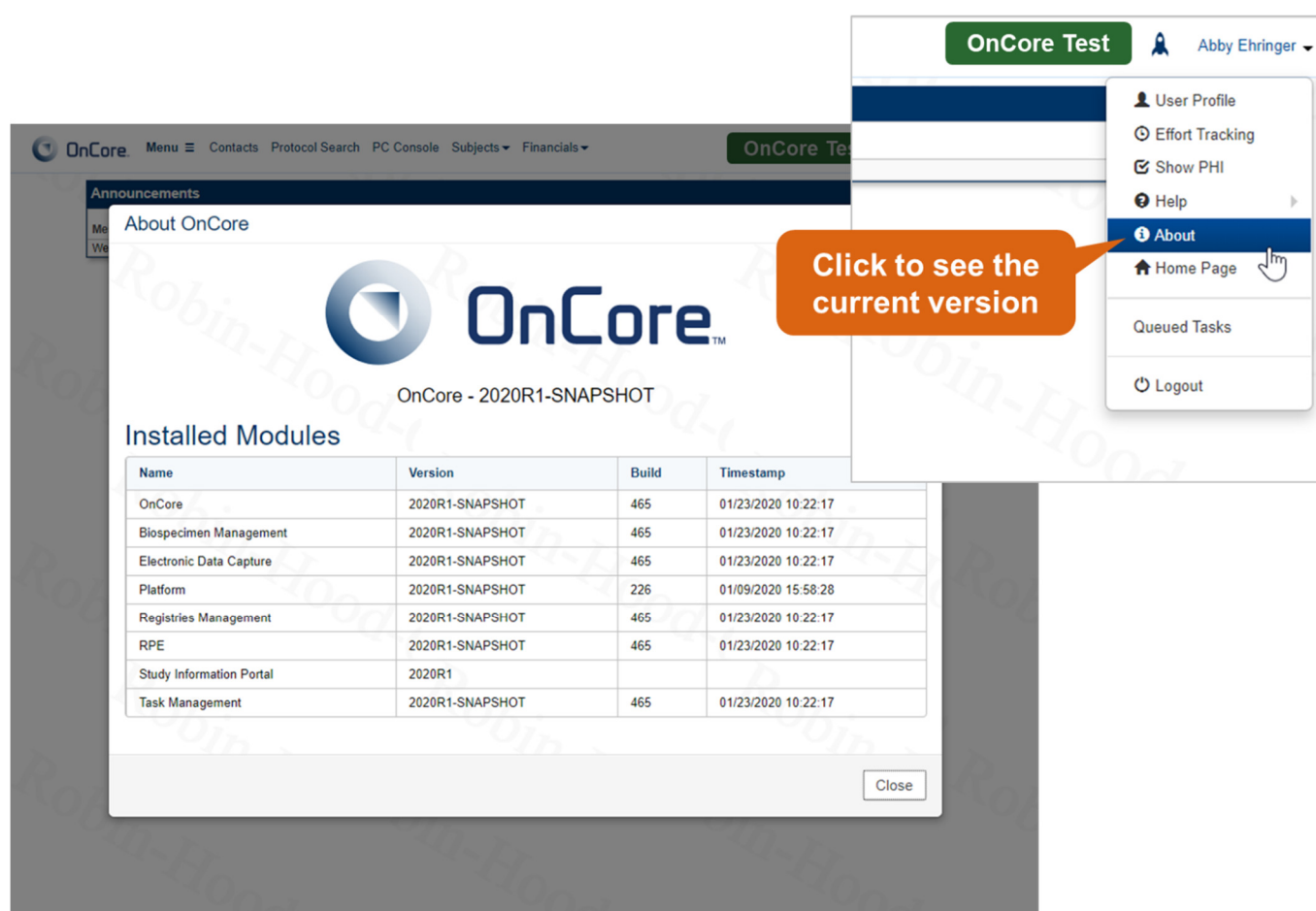
All of the menus and tools that you have access to appear under the main Menu. **Click the star** next to any category or tool to add it to your Favorites Bar. Then, **drag and drop** the menus and items in your Favorites Bar to reorder them.



The User Menu

Click the drop-down arrow next to your name to open the User Menu, which provides links to your home page, your user profile, the effort tracking tool, and custom help links such as the Learning Portal, Onsemble.net, and other resources made available by your OnCore administrators.

Clicking **About** will display information about the version of OnCore and all its modules installed in the current environment.



The screenshot shows the OnCore user interface. At the top right, the user name 'Abby Ehringer' is displayed with a drop-down arrow. The user menu is open, showing options: User Profile, Effort Tracking, Show PHI, Help, About, Home Page, Queued Tasks, and Logout. An orange callout bubble points to the 'About' option with the text 'Click to see the current version'. The 'About OnCore' dialog box is open, displaying the OnCore logo and the text 'OnCore - 2020R1-SNAPSHOT'. Below this is a table titled 'Installed Modules' with the following data:

Name	Version	Build	Timestamp
OnCore	2020R1-SNAPSHOT	465	01/23/2020 10:22:17
Biospecimen Management	2020R1-SNAPSHOT	465	01/23/2020 10:22:17
Electronic Data Capture	2020R1-SNAPSHOT	465	01/23/2020 10:22:17
Platform	2020R1-SNAPSHOT	226	01/09/2020 15:58:28
Registries Management	2020R1-SNAPSHOT	465	01/23/2020 10:22:17
RPE	2020R1-SNAPSHOT	465	01/23/2020 10:22:17
Study Information Portal	2020R1		
Task Management	2020R1-SNAPSHOT	465	01/23/2020 10:22:17

A 'Close' button is located at the bottom right of the dialog box.

Personalizing Your OnCore Home Page

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

The home screen can include a variety of widgets. A *widget* is a personalized list of OnCore data; widgets provide quick access to frequently used elements in OnCore, such as protocols, subjects, and reports. Widgets are provided for:

- Protocols
- Subjects
- SAEs
- Reports
- Registrations
- Saved Protocol Searches
- Tasks

Users can choose the widgets that appear on their home screen and configure the records and fields that appear in the widgets.

All users will have an *Announcements* widget on their home screen. This widget shows system-wide messages that are intended for all users to see when they log in to OnCore. Only users with the “Home Screen Announcements Update” permission can add or delete messages.



Add widgets to the home page

Users can add widgets to their home page and arrange them in any order. The information and links in each widget are configured by each user.

1. From the Home Screen Configuration page, click the **Widgets** tab.

The widgets that have already been added to the home page are shown in the column 1 and column 2 boxes at the top. Widgets that can be added to your home page are listed at the bottom of the page.

The available widgets are:

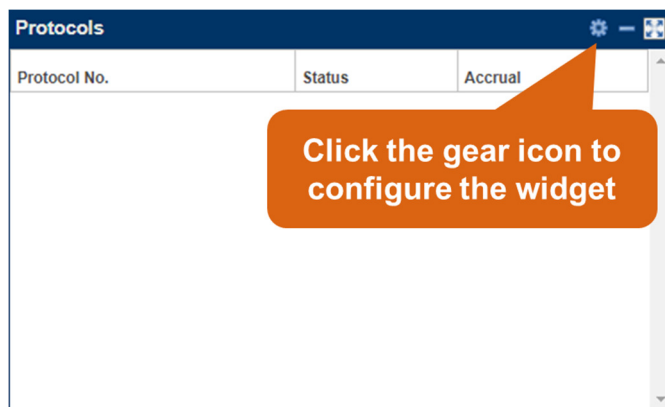
Widget Name	Description
Protocols	Displays high-level protocol information.
Subjects	Displays subject information.
SAEs	Displays SAE information.
Reports	Lists the most recently accessed reports.
Registration	<p>Displays subjects who are ready for registration.</p> <p><i>Only appears if the registration workflow is enabled. (The SHOW_READY_FOR_REGISTRATION configuration is set to TRUE.)</i></p>
Saved Searches	Displays links to saved Protocol and Subject Searches.
Active Tasks	<p>Displays upcoming tasks assigned to a user by name or role. Active tasks have a Target Date and are <u>not</u> waiting on any previous tasks to be completed. Active tasks represent to-do items that the user can complete as soon as possible.</p>
Upcoming Tasks	<p>Displays upcoming tasks assigned to a user by name or role. Upcoming tasks have a Target Date and have at least one incomplete previous task, or have no Target Date yet. Upcoming tasks represent to-do items that the user does not have to work on right away.</p>

2. Select the **Add** checkboxes for the **Protocols**, **Reports**, and **Subjects** widgets.
3. Click **Save**.
4. Click any widget in column 1 or column 2 and use the **green arrows** to move it up or down, or to a different column.
5. Click **Save**.
6. Click the **OnCore logo** in the top left corner to navigate back to the home page.

When you first add the protocols and subjects widgets to your home page, they will be blank.

Configure what appears in the protocols widget

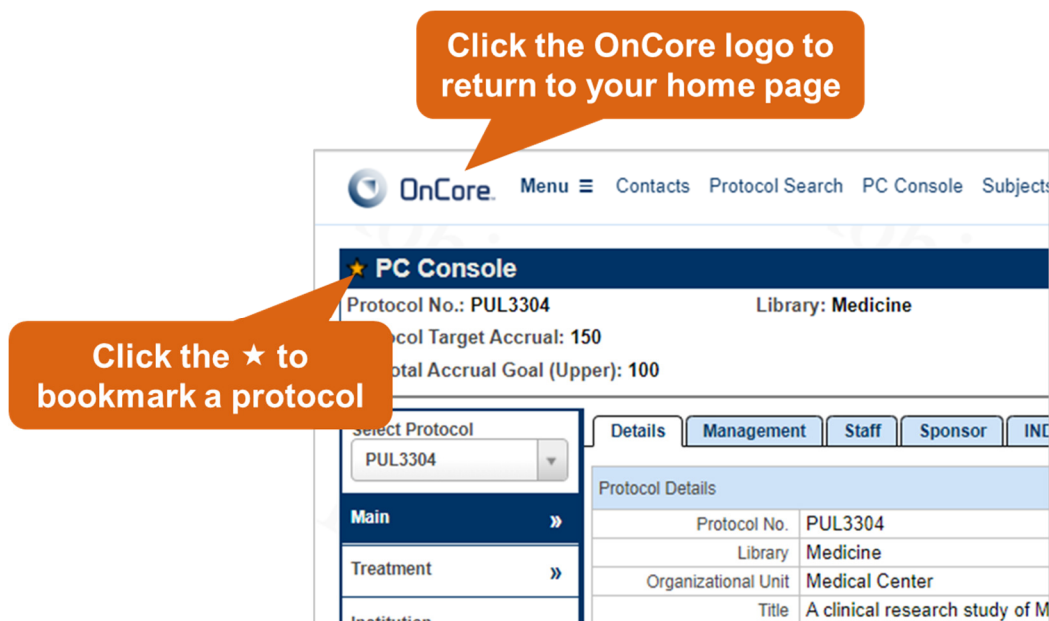
1. Click the **gear icon** in the header of the protocols widget.



2. Select **Yes** in the Display Bookmarked Protocols field.
3. Select **Yes** in the Display Assigned Role field.
4. Click the **Please select a role** link.
5. Select the **role(s)** for which you want to view your protocol assignments. For example, select the following:
 - Protocol Creator (will include you for the protocol you created during class!)
 - Study Site Contact

- Click **Save** in the pop-up window, then click **Save** again to return to your home page.

If no protocols appear in your widget, navigate to **Protocols > PC Console** and open a protocol of your choice. Click the star in the top left corner of the PC Console to bookmark it, then click the OnCore logo to return to your home page.



OnCore Menu Contacts Protocol Search PC Console Subjects

★ PC Console

Protocol No.: PUL3304 Library: Medicine

Protocol Target Accrual: 150

Total Accrual Goal (Upper): 100

Select Protocol: PUL3304

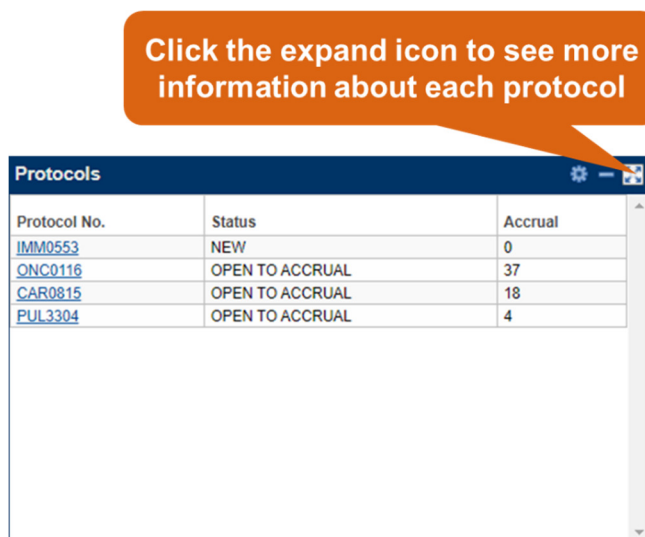
Main Treatment Institution

Details Management Staff Sponsor INC

Protocol Details

Protocol No.	PUL3304
Library	Medicine
Organizational Unit	Medical Center
Title	A clinical research study of M

- Click the expand icon in the header of the protocols widget to see more information about the protocols in your widget.



Protocols

Protocol No.	Status	Accrual
JMM0553	NEW	0
ONC0116	OPEN TO ACCRUAL	37
CAR0815	OPEN TO ACCRUAL	18
PUL3304	OPEN TO ACCRUAL	4

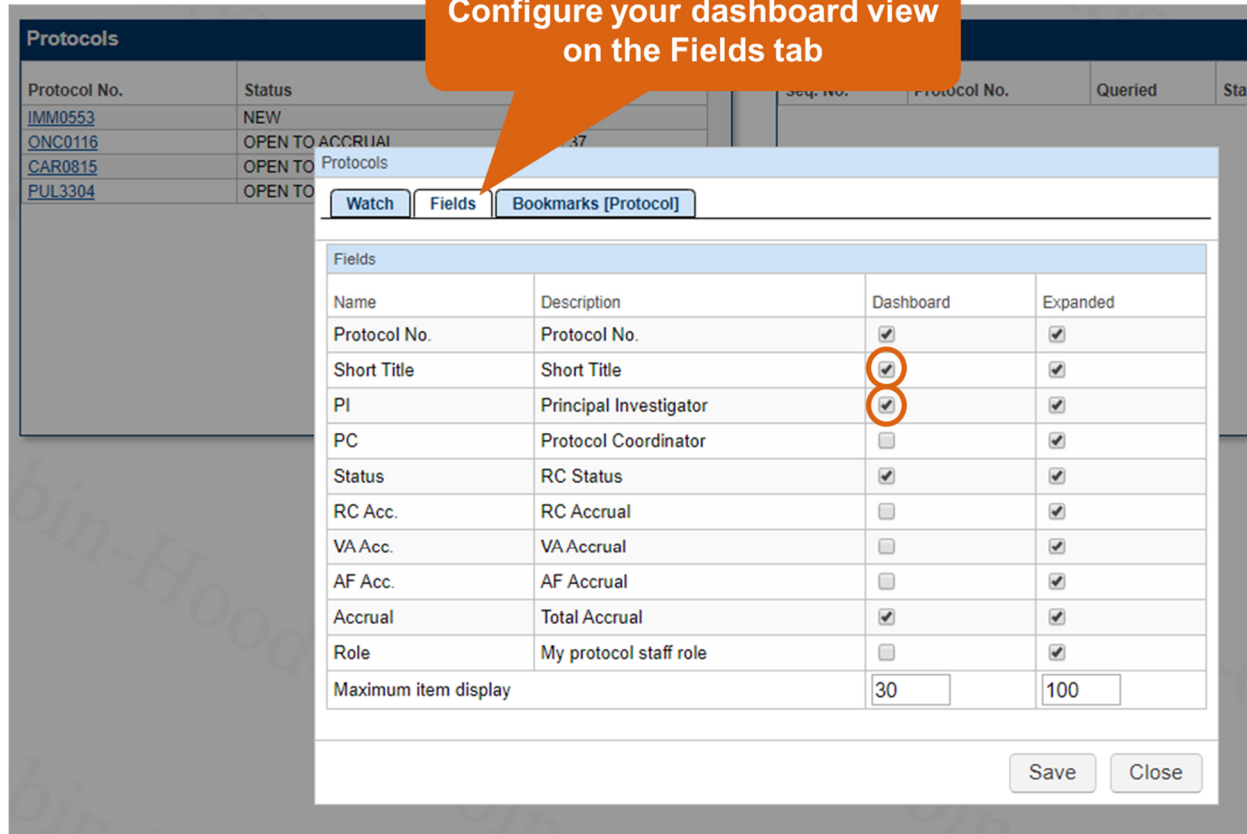
- Click **Close** to return to the regular view of your home page.

By default, the Protocol No., Status, and total Accrual to date appear for each protocol included in your widget. You can customize the information that appears in your “dashboard view” and your “expanded view.” Your personal settings will not affect any other OnCore users.

9. Click the **gear icon** in the header of the protocols widget.
10. Click the **Fields** tab.
11. Select the checkboxes for the fields you’d like to see in your dashboard view and in your expanded view, then click **Save**.
 - For example, select the Short Title and Principal Investigator fields.

The fields selected for your dashboard view are now visible in your widget. Similar steps can be used to configure what appears in your Subjects widget.

Configure your dashboard view on the Fields tab

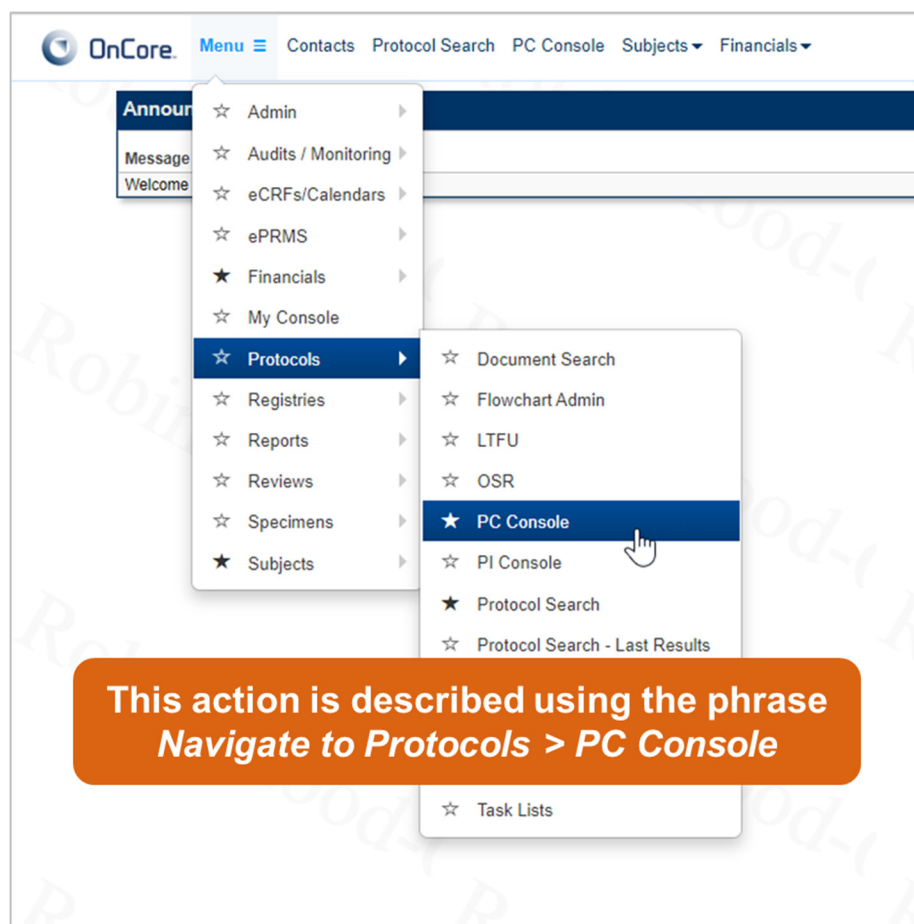


Name	Description	Dashboard	Expanded
Protocol No.	Protocol No.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Short Title	Short Title	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PI	Principal Investigator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PC	Protocol Coordinator	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Status	RC Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
RC Acc.	RC Accrual	<input type="checkbox"/>	<input checked="" type="checkbox"/>
VA Acc.	VA Accrual	<input type="checkbox"/>	<input checked="" type="checkbox"/>
AF Acc.	AF Accrual	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Accrual	Total Accrual	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Role	My protocol staff role	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Maximum item display		<input type="text" value="30"/>	<input type="text" value="100"/>

Navigating in OnCore

Menus and menu items

Many of the features of OnCore can be viewed in the PC Console. To open the PC Console, click the arrow next to the *Protocols* menu. The Protocols menu will always be in your main Menu, but it can also be added to your Favorites Bar.



A list of *menu items* appears; select the **PC Console** menu item.

In OnCore, the action of moving through several options to reach a desired location is called *navigation*. For convenience, navigation to a specific OnCore page is often described in a *path*, such as Subjects > Subject Console.

In the above example, selecting PC Console from the Protocols menu would be abbreviated in the following phrase: Navigate to **Protocols > PC Console**.

Consoles

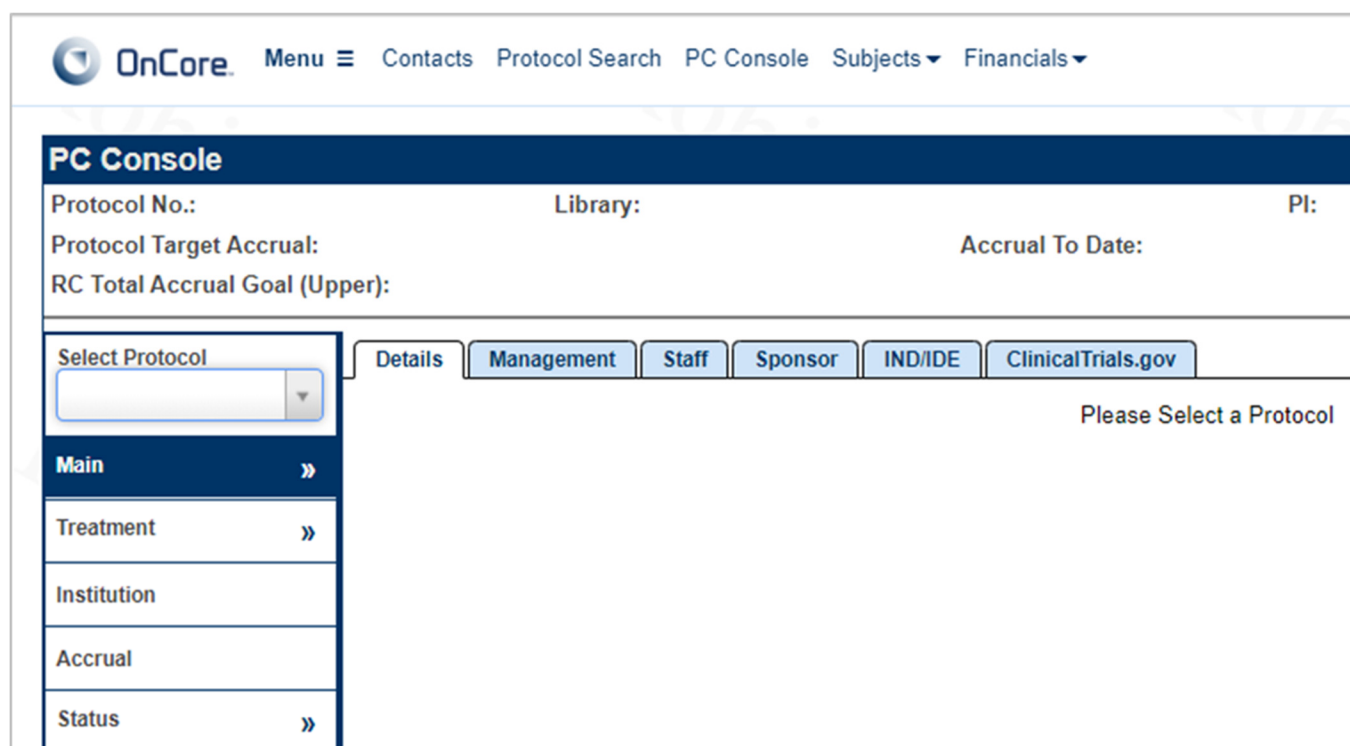
OnCore contains several consoles. A *console* is a set of related pages for a particular workflow, function, or type of data. For example, the PC Console displays information about one protocol at a time: details that might be of interest to a Protocol Coordinator. The PC Console includes the protocol number and title, the type of study, the staff assigned to the protocol, the protocol sponsor, and other protocol-related information.

In the same way, the 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.

To explore the elements of a console:

1. Navigate to **Protocols > PC Console**.

The PC Console opens, allowing you to select a protocol.



2. All protocols in OnCore are identified by an alphanumeric *protocol number*. Select a protocol by entering the protocol number in the **Select Protocol** field.

Find-as-you-type fields

The Select Protocol field is a *find-as-you-type field*. A list of potential matching records appears as soon as you start typing. 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, short title, or any other searchable identifier. OnCore will search the following identifiers:

- Protocol No.
- Short Title
- IRB No.
- PRMC/SRC No.
- Sponsor Protocol No.
- Pharmacy No.
- CTSI No.
- IND and IDE identifiers
- Contract No.
- NCT Number

Protocol No.	Alternate No.(IRB/PRMC/Pharm./Sponsor PCL/CTSI/IND/IDE/Contract No./NCT No.)	Short Title
CAR2331	2015383(IRB); 2015783(PRMC); 5527(Sponsor PCL); 5993(Sponsor PCL); 5283(Sponsor PCL); NCT00126545(NCT No.)	TART - Troglitazone Atherosclerosis Regression Trial
CAR8239	2015452(IRB); 2015852(PRMC); 5527(Sponsor PCL); 6023(Sponsor PCL); 5352(Sponsor PCL); NCT01263824(NCT No.)	Blood Markers for Inflammation and Coronary Artery Vasoreactivity Testing in Patients With Chest Pain
CAR9175	2015443(IRB); 2015843(PRMC); 5343(Sponsor PCL); 5578(Sponsor PCL); NCT01260857(NCT No.)	Safety And Efficacy Of Spirinolactone Plus Hydroflumethiazide In The Treatment Of Filipino Patients

Displaying 13 out of 13 results.

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.

1. Type **12** in the **Select Protocol** field in the PC Console.
2. Select any protocol from the drop-down list.

The PC Console displays the protocol record and its associated information.

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 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 you to configure the protocol's treatment steps and arms.

Horizontal tabs

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	Details	Management	Staff	Sponsor
	IND/IDE	ClinicalTrials.gov		
Main	Protocol Details History			
Treatment	Protocol No.	CAR0815	NCT Number	NCT00178620
Institution	Library	Cardiology	Department	Cardiology
Accrual	Organizational Unit	Medical Center		
Status	Title	PATCAR Pilot Trial: A Phase 4 Study, Pre-hospital Administration of Thrombolytic Therapy With Urgent Culprit Artery Revascularization		
Reviews	Short Title	Pre-hospital Administration of Thrombolytic Therapy With Urgent Culprit Artery Revascularization		
Documents/Info	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.		
	Phase	IV	Scope	National
	Age	Adults	Consent at Age of	N/A

Vertical Tabs

Horizontal Tabs

View-only mode vs. update mode

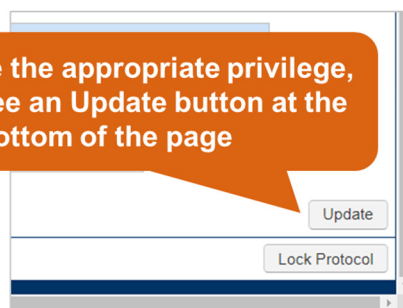
Many pages in OnCore are displayed in view-only or update mode. In *view-only mode*, you can view data, but you cannot make modifications to it. In *update mode*, the fields on the page become editable, and radio buttons and checkboxes become selectable, allowing you to make modifications to the data.

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 is discarded.

If you have the appropriate privilege, you will see an Update button at the bottom of the page



In Update mode, fields are editable and data can be entered or changed

Not Applicable <input type="checkbox"/>				
50	RC Total Accrual Goal (Lower)	40	RC Total Accrual Goal (Upper)	60
15	Affiliate Accrual Goal	20	Accrual Duration (Months)	24
Completion Dates				
Primary Completion Date	07/24/2018	<input type="radio"/> Actual	<input checked="" type="radio"/> Anticipated	
Study Completion Date	07/24/2019	<input type="radio"/> Actual	<input checked="" type="radio"/> Anticipated	
<input type="button" value="Submit"/> <input type="button" value="Clear"/> <input type="button" value="Close"/>				
<input type="button" value="Lock Protocol"/>				

Click Submit to save your changes
 Click Clear to revert back to the most recently saved data
 Click Close to return to view mode

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 that follows, after selecting a role and a staff member, you must click Add to assign the staff member to a protocol:

Details
Management
Staff
Sponsor
IND/IDE
ClinicalTrials.gov

Protocol Staff

Role

Staff Name

Start Date


View Staff Organization Access
Hide Affiliates
Active Staff Only



Role	Last Name	First Name	Middle Name	Organization	Edit	Select All None
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"/>

Choose a Role and the Staff Name, then click Add

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 view mode on the Staff tab.

Date widgets

Fields that have the date icon  to the right of the field display *date widgets*. Clicking on the date icon launches the date widget, where you can select your date from the date widget calendar.

Protocol Staff			
Role	Staff Name	Start Date	
Budget Analyst	Whall, Brian, D		
			
Role	Last Name	First Name	Organization
Principal Investigator	Applewood	Grace	The
Clinical Trial Coordinator	Austin	Chad	The
Protocol Creator	Dooley	Angela	The

Date widget and keyboard shortcuts

OnCore accepts dates in a number of formats, including one- or two-digit months and days and two- or four-digit years. OnCore converts all entries into the MM/DD/YYYY date format. If you enter two-digit months and days, you can omit the slashes. Any of the following are acceptable:

12/2/09 will become 12/02/2009

09/01/1955 is accepted as-is

4/6/88 will become 04/06/1988

080820 will become 08/08/2020

Date fields in OnCore also accept a variety of *keyboard shortcuts*, or dates that are calculated relative to another date, as opposed to a specific date.

Shortcut	Resulting entry
t	Inserts the current date
t + n	Inserts a date <i>n</i> days from today:
t - n (where <i>n</i> is a number)	t+3 is three days from today t-1 inserts yesterday's date (one day ago)
w - n	Inserts the current date plus/minus <i>n</i> number of weeks
w + n	w-6 will insert a date six weeks ago w+2 will insert a date two weeks from today
m + n	Inserts the current date plus/minus <i>n</i> number of months
m - n	
y + n	Inserts the current date plus/minus <i>n</i> number of years
y - n	
mb or me	Inserts the beginning or end of the month, respectively; it can be used alone or with + or - with a number
yb or ye	Inserts the beginning or end of the year, respectively; it can be used alone or with + or - with a number

NOTE: When entering a keyboard shortcut into a date widget field, you can press Enter, Tab, or click anywhere outside the date widget to calculate the appropriate date in MM/DD/YYYY format.



Test your knowledge: How many different ways could you enter January 1st 2019 into a date widget in OnCore?

Tips for Using OnCore Successfully

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 strange behavior in the application.

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.

Single-click buttons and links

Especially when clicking Save or Submit to create a new record, click once so that only one record is created and duplicate data is not saved in the database. Avoid double-clicking with the mouse when working in OnCore.

Use a computer with a keyboard and mouse

OnCore stores large volumes of complex information about the protocols, subjects, calendars, and budgets in your research portfolio. When using the application, use a keyboard and a mouse for efficient data entry. Using a tablet or touchscreen can make data entry feel cumbersome or time-consuming, while using a keyboard and mouse can speed up your workflows significantly.

Allow pop-up windows when using OnCore

OnCore uses many pop-up (browse) windows that allow you to make selections and enter data. If your browser is set to prevent pop-up windows from opening, it will also prevent OnCore's browse windows from opening.

You must allow pop-up windows to open in each browser that you are using with OnCore:

robins-hood-qa.forteresearch.com/srms/ProtocolUpdateServlet

OnCore Menu Contacts Protocol Search PC Console Financials CRA Console

PC Console
 Protocol No.: IMM0553 Library: Medicin
 Protocol Target Accrual: 150
 RC Total Accrual Goal (Upper): 120

Select Protocol: IMM0553

Details Management Staff Sponsor IND/IDE ClinicalTrials.gov

Main IRB No. 10299 Pharmacy No. Priority Score Enable Payments Integration

Pop-ups blocked:
 • https://robin-hood-...Groups¶meter=27481
 Always allow pop-ups and redirects from https://robin-hood-qa.forteresearch.com
 Continue blocking
 Manage Done

In Chrome, choose Always allow pop-ups...

Firefox prevented this site from opening a pop-up window.

OnCore Menu Contacts Protocol Search PC Console Financials CRA Console

PC Console
 Protocol No.: IMM0553 Library: Medicin
 Protocol Target Accrual: 150
 RC Total Accrual Goal (Upper): 120

Applewood, Grace Sponsor: Ascenta Therapeutics Protocol Status: NEW IRB Expiration:

Allow pop-ups for robin-hood-qa.forteresearch.com
 Edit Pop-up Blocker Options...
 Don't show this message when pop-ups are blocked
 Show 'https://robin-hood-qa.forteresearch.com/srms/GenericBrowseServlet?brow...'

In Firefox, choose Allow pop-ups...

Accrual Participation CTSI No. Approval Date CTSI Category

Status

Reviews

Documents/Info

Risk Assessment

Eligibility

Comments

Coding Scheme: CTCAE v4.0 Generate Subject Id: No

Internet Explorer blocked a pop-up from robin-hood-qa.forteresearch.com.

Allow once Options for this site Always allow More settings

In Internet Explorer, choose Options for this site > Always allow

Notifications Allow On Treatment date to be entered before On Study date Populate On Follow-Up Date with Off Treatment Date

Annotations

Deviations

New Protocol

Administrative Groups

Management Group	Primary	Delete
Internal Medicine	<input type="checkbox"/>	<input type="checkbox"/>

Microsoft Edge blocked a pop-up from robin-hood-qa.forteresearch.com.

Allow once Always allow Add Delete?

In Edge, choose Always allow