

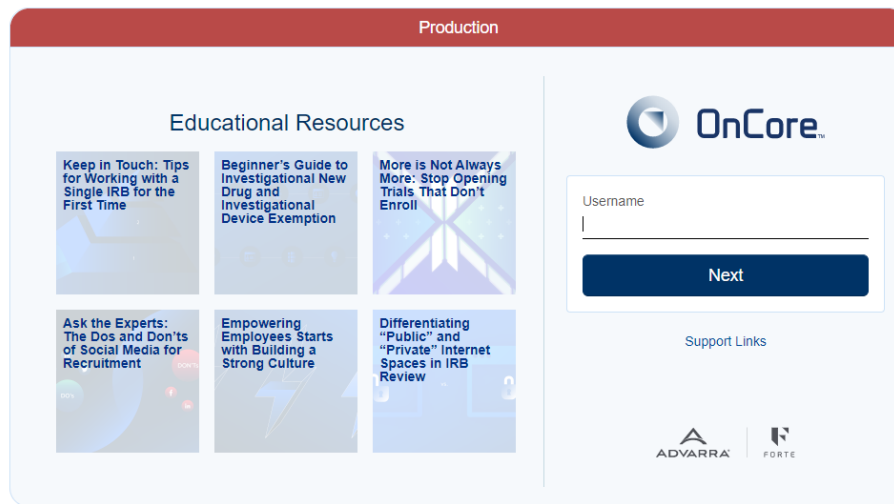
## OnCore Navigation

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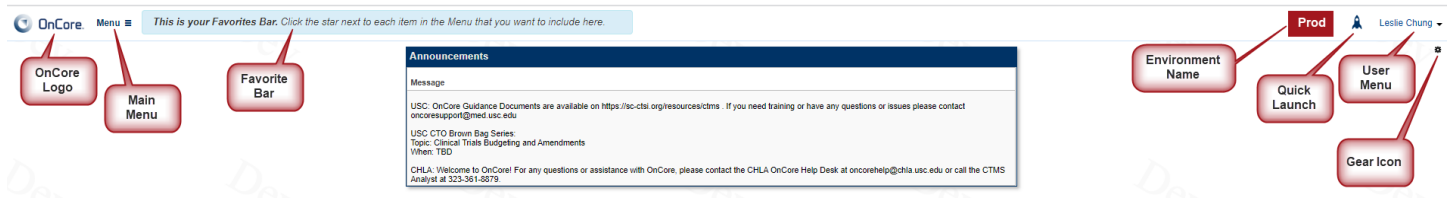
# OnCore Navigation

## Log-in Page

Production URL - <https://usc-oncore-prod.forteresearchapps.com/forte-platform-web/login>  
 Enter your med account username and password.



## Home Page



**OnCore Logo** – clicking returns you to the Home Page

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

**Favorite Bar** – it contains menus and menu items that you bookmark

**Environment Name** – environment that you are currently logged in

**Quick Launch** – provides the user access to OnCore pages

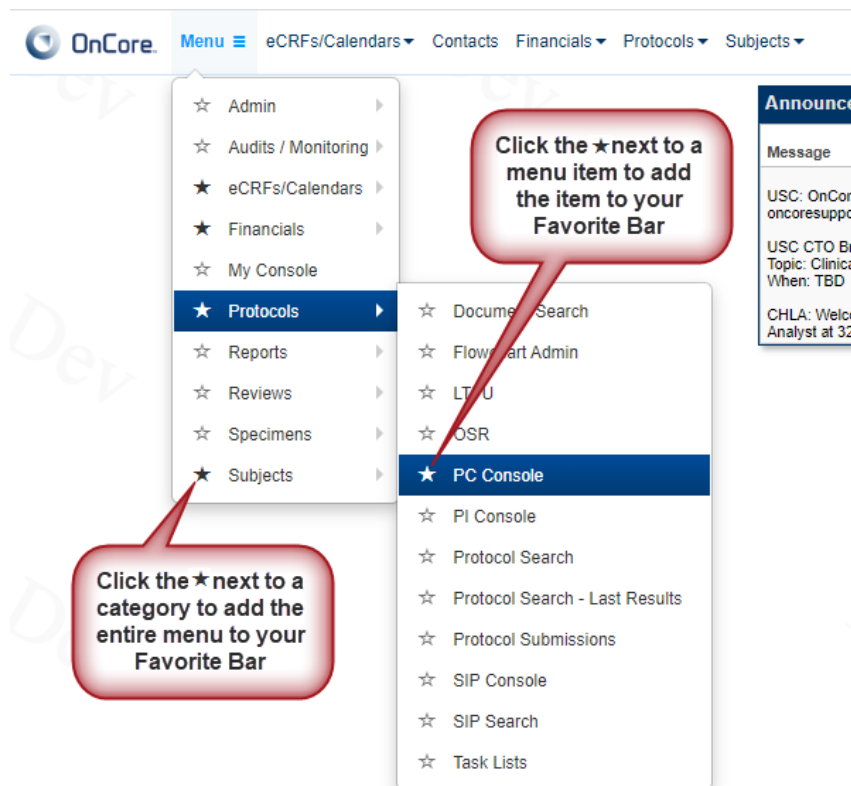
**User Menu** – provides access to Help links

**Gear Icon** – 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

## OnCore Navigation

### Favorite 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 Favorite Bar. Then, drag and drop the menus and items in your Favorite Bar to reorder them.



# OnCore Navigation

## Personalized Home Page

The home page, also known as your dashboard, is your initial landing page when you log in to OnCore. 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.

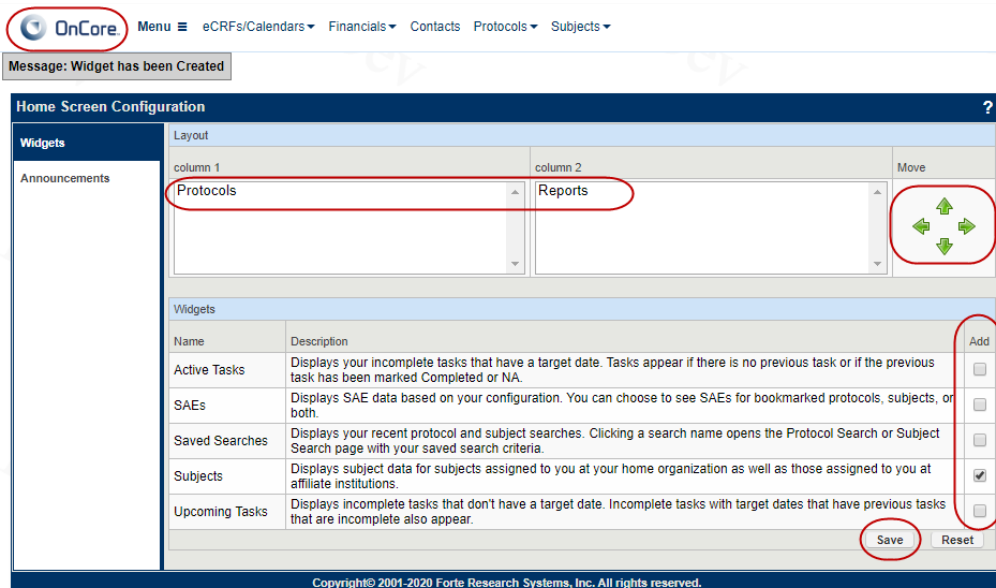
Users can choose the widgets that appear on their home screen and configure the records and fields that appear in the widgets.

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.

1. Click the gear icon



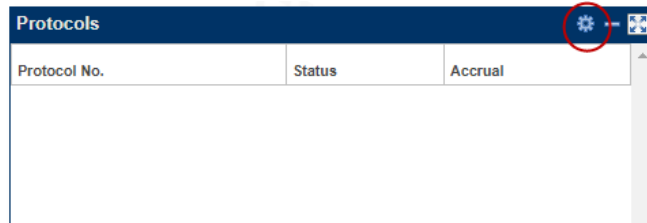
2. Select the Add checkboxes for the widgets you would like to show on your home page
3. Click Save
4. Click any widget in column 1 or column 2 and use the green arrows to move it up or down, or to a different column
5. Click Save
6. Click in the OnCore logo to navigate back to the home page



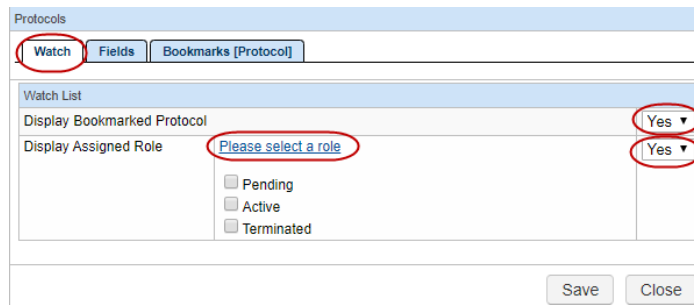
## OnCore Navigation

### Configure Widgets (Protocols and Subjects)

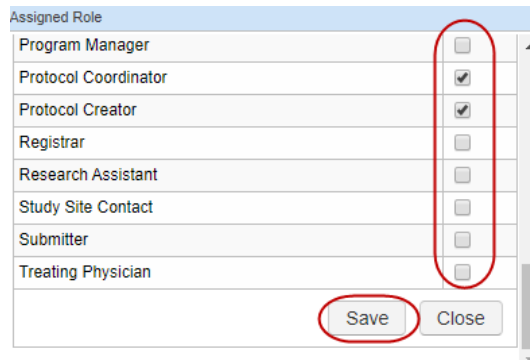
1. Click the gear icon in the header of the widget



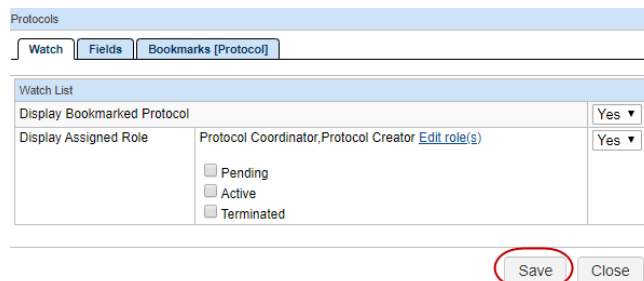
2. Under Watch tab
3. Select Yes in the Display Bookmarked Protocol field
4. Select Yes in the Display Assigned Role field
5. Click on Please select a Role



6. Select the role(s) for which you want to view your protocol assignments
7. Click Save



8. Click Save



## OnCore Navigation

9. Under Fields tab
10. Select the checkboxes for the fields you'd like to see in your dashboard view and in your expanded view
11. Click Save

| Name         | Description            | Dashboard                           | Expanded                            |
|--------------|------------------------|-------------------------------------|-------------------------------------|
| Protocol No. | Protocol No.           | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Short Title  | Short Title            | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| PI           | Principal Investigator | <input 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: 30 (Dashboard), 100 (Expanded)

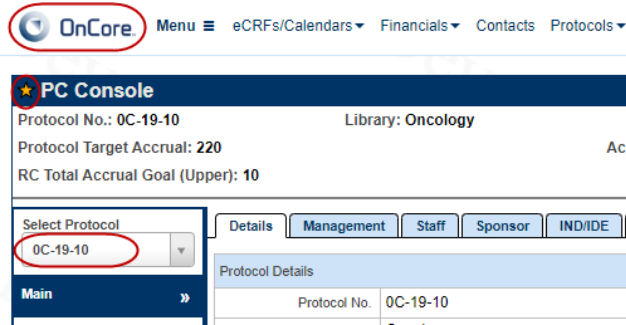
**Save** Close

12. If no data appears in your widget, navigate to Protocols -> PC Console (or Subjects -> CRA Console) from the main menu or favorite bar

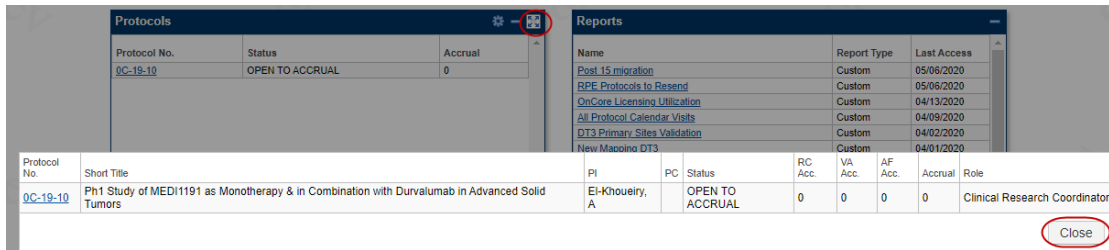
- OnCore Menu
  - eCRFs/Calendars
  - Financials
  - Contacts
  - Protocols
  - Subjects
- PC Console
  - ☆ Admin
  - ☆ Audits / Monitoring
  - ★ eCRFs/Calendars
  - ★ Financials
  - ☆ My Console
  - ★ Protocols
  - ☆ Reports
  - ☆ Reviews
  - ☆ Specimens
  - ★ Subjects
- Main
  - ☆ Document Search
  - ☆ Flowchart Admin
  - ☆ LTFU
  - ☆ OSR
  - ★ PC Console
  - ☆ PI Console
  - ☆ Protocol Search
  - ☆ Protocol Search - Last Results
  - ☆ Protocol Submissions
  - ☆ SIP Console
  - ☆ SIP Search
  - ☆ Task Lists

## OnCore Navigation

13. Search a protocol of your choice.
14. Click the star in the top left corner to bookmark a protocol
15. Click the OnCore logo to return to home page



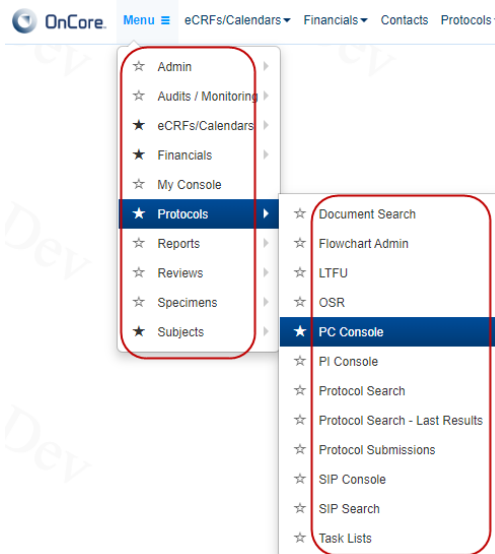
16. Click the expanded icon to see more information about the protocol in your widget
17. Click Close



### Menu and Menu Items

Menu are your main category while menu items are the sub-category under your menu.

Protocol is your Menu while PC Console is your Menu Item



## OnCore Navigation

### Tips for using OnCore

**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 menu to navigate within the program. 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 keyboard and mouse** – OnCore stores a large volume of complex information about 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 window** – OnCore uses many pop-up 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 browser window from opening.

### Training / Guidance Documents

To request for a group or 1-on-1 training, please email [oncoresupport@med.usc.edu](mailto:oncoresupport@med.usc.edu)

Guidance Documents link are available in <https://sc-ctsi.org/resources/ctms>

or in OnCore

