PHRI ICT USER GUIDE

DFexpore 5.4.0 Installation Guide



| | Version | 1.0 |
|---|---------------|-----------|
| ſ | Modified Date | 6/16/2020 |

Contents

This guide will take you through the requirements for running DFexplore on your local computer and how to install DFexplore and DFsend.

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DFexplore Summary and Installation Requirements

DFdiscover is a rebranded upgrade release of DataFax, an Electronic Data Capture(EDC) software used at PHRI. The system is used to collect and manage study data at PHRI. DFexplore rebranded upgrade release of iDataFax, an EDC client tool that is used by site users to enter participant data which is stored on DFdiscover server **edc.phri.ca**.

DFsend is a desktop application providing functionality for users who need to securely transmit scanned PDF study documents from a local computer to a DFdiscover study server, over the internet, without requiring direct access to a specific study database.

DFsend includes user authentication, encryption and tracking and provides a safe and reliable alternative to faxing or emailing study CRFs to a DFdiscover server. User credentials, permissions will be same as DFexplore(formarly called iDataFax).

Sites/Users currently using the iDataFax and DFsend 2014.1.x client will need to download and install DFexplore/DFsend 2021 v5.4.0 prior to July 23rd, 2021 from the following link: <u>https://rome.phri.ca/files/idataFax/</u>

You can prepare in advance by establishing connection to test server **explore.dfdiscover.com**. Following login screen confirms client is installed correctly, there is no need to login



iDataFax 2014.1.x cannot be used to connect to DFDiscover server once the upgrade is completed

Client System Requirements

- TCP/IP Networking (512kbps internet connection speed or better)
- Operating system: Windows 10, macOS 10.14 (Mojave) or later

Important note: The Windows client tools have been tested and verified with 64-bit Windows 10. The client tools are not available for any 32-bit Windows OS.

- Disk Space: 200MB
- Used only to download and install the software (50-200 MB) as entered data is not stored on your local drive but sent via the Internet securely to the PHRI data server

DFexplore Installation Instructions for Windows

1. Download DFexplore_5_4_0.msi to your local computer, double clicking on msi file or right click and select **Install** to start installation



2. Click Run

| 🛃 DFexplore 5.4.0 | | _ | |
|---|---|--|--|
| Welcome to the DFexplore | e 5.4.0 Setup | Wizard | - |
| The installer will guide you through t computer. | the steps required | to install DFexplore | 5.4.0 on your |
| WARNING: This computer program treaties. Unauthorized duplication or result in severe civil or criminal pena possible under the law. | is protected by co distribution of this alties, and will be p | pyright law and intern program, or any por rosecuted to the ma | national ion of it, may kimum extent |
| | Cancel | < Back | Next > |

3. Click Next

| DFexplore 5.4.0 | _ | | | × |
|---|--------|--------|--------|-----|
| Select Installation Folder | | | | |
| The installer will install DFexplore 5.4.0 to the following folder. | | | | |
| To install in this folder, click "Next". To install to a different folder, ent "Browse". | eritb | elow | or cli | ick |
| <u>F</u> older: | | | | |
| C:\Program Files\DFNet Research\ | | Brov | vse | |
| | I | Disk (| Cost | |
| Install DFexplore 5.4.0 for yourself, or for anyone who uses this com | puter: | | | |
| Everyone | | | | |
| ◯ Just me | | | | |
| Cancel < Back | | | Next | > |

4. Accept default path or chance if required and click Next

| 🕼 DFexplore 5.4.0 | | - | - | | × |
|---|--------------------|-----------|---|------|---|
| Confirm Installation | | | | | |
| The installer is ready to install DFexp | lore 5.4.0 on your | computer. | | | |
| Click "Next" to start the installation. | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | Cancel | < Back | | Next | > |

5. Click Next to start the installation

| 🕼 DFexplore 5.4.0 | | | - | | × |
|-------------------------------------|--------------|--|---|-------|---|
| Installation Complete | | | | | |
| DFexplore 5.4.0 has been successful | y installed. | | | | |
| Click "Close" to exit. | | | | | |
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| | | | | | |
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| | | | | | |
| | Cancel | <back< th=""><th></th><th>Close</th><th>•</th></back<> | | Close | • |

6. Click Close

DFexplore Installation Instruction for MAC

- 1. Download the DFexplore package file to your local computer and follow the process below
- 2. In the **System Preferences -> Security and Privacy** make sure you allow apps downloaded from anywhere for the duration of the package installation. If you do not have permission to make the change please contact your IT Department

| aystem Preferences Cun | | | | | | | |
|------------------------|----------------------------|--|---------------|-----------------------|----------------------|--------------------|--|
| | ••• <> | IIII System Prefer | ences | | Q Search | | |
| | Sign in to Set up iClou | your Apple ID d, the App Store, and more. | | | | Sign In | |
| | General Desktop & | Dock & Mission r Menu Ber Contro | Siri | Q Spotlight | Language & Region | A Notifications | |
| | internet Accounts | Accessibility Screen T | me Extensions | Security & Privacy | | | |
| | Software Network | Bluetooth Sound | Printers & | Keyboard | Trackpad | Mouse | |
| | Displays Sidecar | Energy Saver Date & Ti | me Sharing | Time Machine | Startup Disk | CDs & DVDs | |
| | | | | | | | |
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| 1 | System Preferences | Edit |
|------|--------------------|------|
| Abou | ut This Mac | |
| Syst | em Preferences | |
| App | Store | |
| Rece | ent Items | > |
| Forc | e Quit | C#J |
| Slee | р | |
| Rest | art | |
| Shut | Down | |

3. Select System Preferences



4. Click Unlock icon to make changes



5. Type in your OSX credentials to unlock the security and privacy preferences.



6. Select "App Store and identified developers"



7. Run the DFexplore package located in your Downloads Folder



8. Type in your OSX credentials to allow the package installation. If you do not know your OSX - credentials please contact your IT department

| Favorites | Introduc Destinat Installat Summar | Installer is trying to install new software. Enter your password to allow this. User Name: Johnny Appleseed Password: Cancel Install Soft | oftware |
|---|---|---|------------------|
| Orange Yellow Green | | Change | Install Location |



9. Clock Close



DFsend Installation Instructions for Windows

1. Download DFexplore_5_4_0.msi to your local computer, double clicking on msi file or right click and select **Install** to start installation

| Open File | - Security Wa | rning | \times |
|-----------|--|---|----------|
| Do you | want to run | this file? | |
| - | Name: | po\CDSI-DFnet\DFdiscover 5.4.0\DFsend_5_4_0.ms | si |
| JRY- | Publisher: | DF/Net Research Inc. | |
| | Type: | Windows Installer Package | |
| | From: | $\label{eq:last_linear} \label{eq:last_linear} \label{eq:linear} $$ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$ | |
| | | Run Cancel | |
| 🗹 Alwa | ys ask before | opening this file | |
| | While files fi potentially ł you trust. <u>W</u> | rom the Internet can be useful, this file type can narm your computer. Only run software from publishe /hat's the risk? | irs |

2. Click Run



| 🕞 DFsend 5.4.0 | | | _ | | \times |
|---|-----------------------|-----------------|--------|-------------|----------|
| Select Installation Folder | | | | | |
| The installer will install DFsend 5.4.0 | to the following fo | lder. | | | |
| To install in this folder, click "Next". T "Browse". | o install to a differ | ent folder, ent | eritbe | elow or cli | ck |
| <u>F</u> older: | | | | | |
| C:\Program Files\DFNet Research | М | | I | Browse | |
| | | | D | isk Cost | |
| Install DFsend 5.4.0 for yourself, or | for anyone who us | es this comput | er: | | |
| • Everyone | | | | | |
| ◯ Just me | | | | | |
| | Cancel | < Back | | Next | > |

4. Accept default path or chance if required and click Next



5. Click Next to start the installation

| d DFsend 5.4.0 | | — | | \times |
|------------------------------------|------------|--------|------|----------|
| Installation Complete | | | | |
| DFsend 5.4.0 has been successfully | installed. | | | |
| Click "Close" to exit. | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | Cancel | < Back | Clos | e |

6. Click Close

1. Download the DFsend package file to your local computer and run the package



2. Click Continue

| ••• | 😺 Install DFsend5.4.0 | |
|---|--|--|
| | Standard Install on "Macintosh HD" | |
| Introduction Destination Select Installation Type | This will take 278.8 MB of space on your computer. Click Install to perform a standard installation of this software on the disk "Macintosh HD". | |
| Summary | | |
| | Change Install Location | |
| | Go Back Install | |

- 3. Click Install
- 4. Type in your OSX credentials to allow the package installation. If you do not know your OSX credentials please contact your IT department

| C | Installer is t | rying to install new software. | |
|-------|----------------|--------------------------------|-------|
| | Enter your pas | sword to allow this. | - |
| duc | User Name: | Johnny Appleseed |] |
| inat | Password: | | oftwa |
| illat | | | |
| llati | | Cancel Install Software | |
| mar | | | |



5. Clock Close