

DFexplore 5.4.0

Installation Guide



Version	1.0
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.

Contents.....	1
DFexplore Summary and Installation Requirements	2
Client System Requirements	3
DFexplore Installation Instructions for Windows.....	3
DFexplore Installation Instruction for MAC	6
DFsend Installation Instructions for Windows	11
DFsend Installation Instruction for MAC	14

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** .

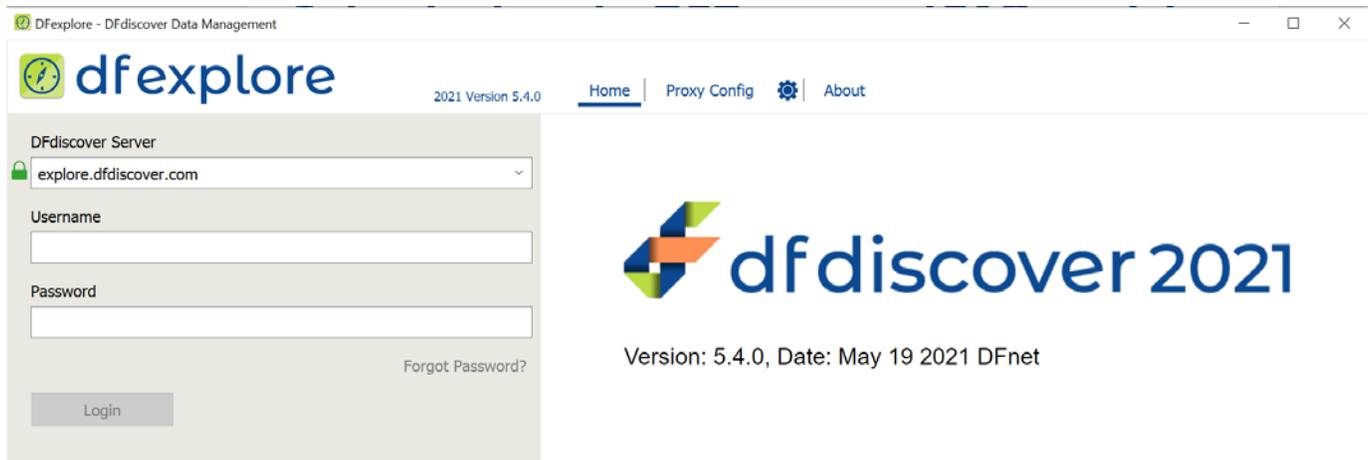
DFsend is a desktop application providing functionality for users who need to securely transmit scanned PDF study documents from a local computer to a DFdiscover study server, over the internet, without requiring direct access to a specific study database.

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(formerly 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:

<https://rome.phri.ca/files/idataFax/>

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

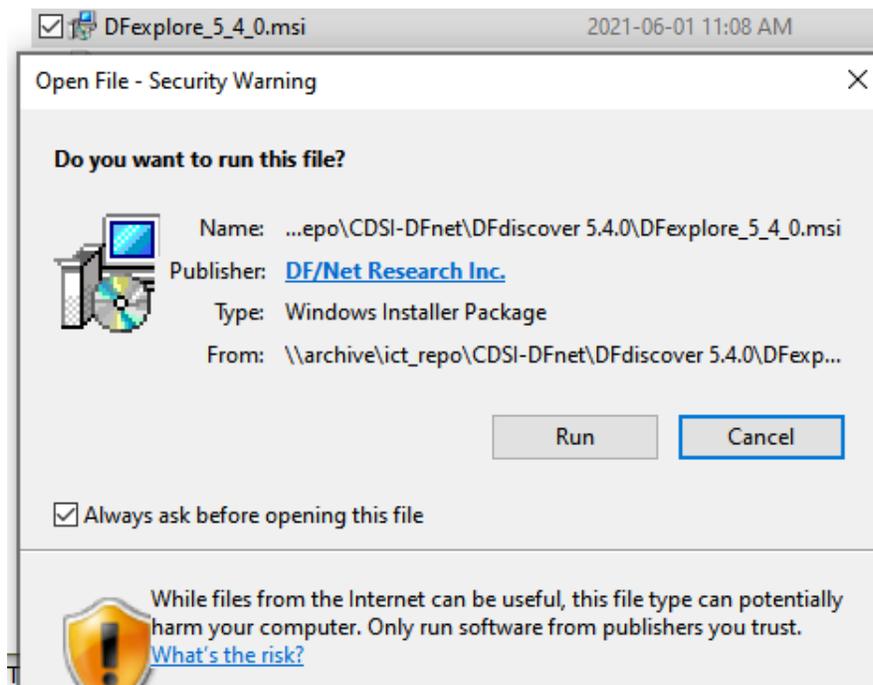
- TCP/IP Networking (512kbps internet connection speed or better)
- Operating system: Windows 10, macOS 10.14 (Mojave) or later

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.

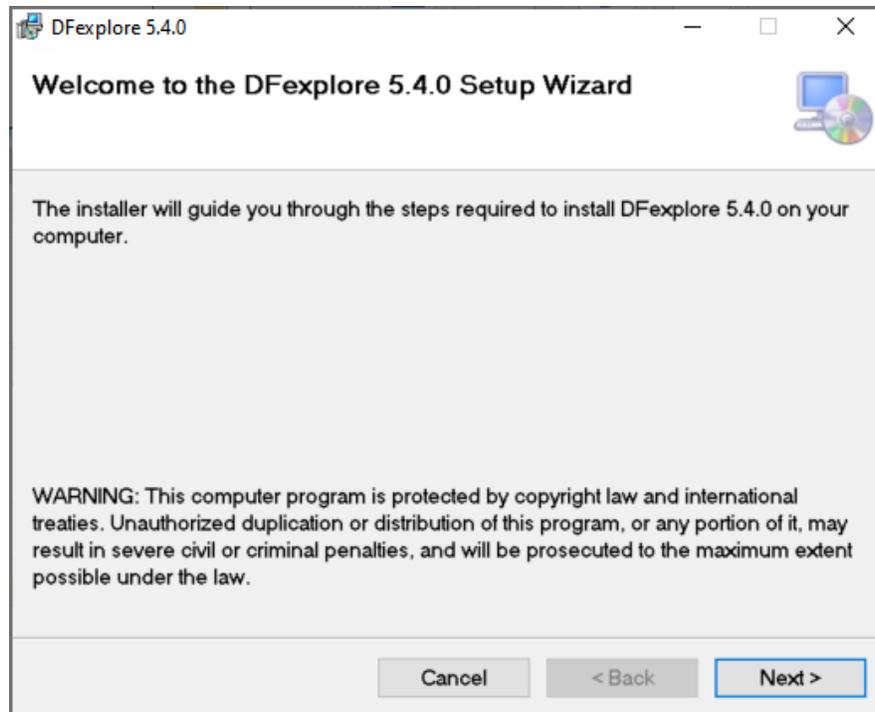
- Disk Space: 200MB
- Used only to download and install the software (50-200 MB) as entered data is not stored on your local drive but sent via the Internet securely to the PHRI data server

DFExplore Installation Instructions for Windows

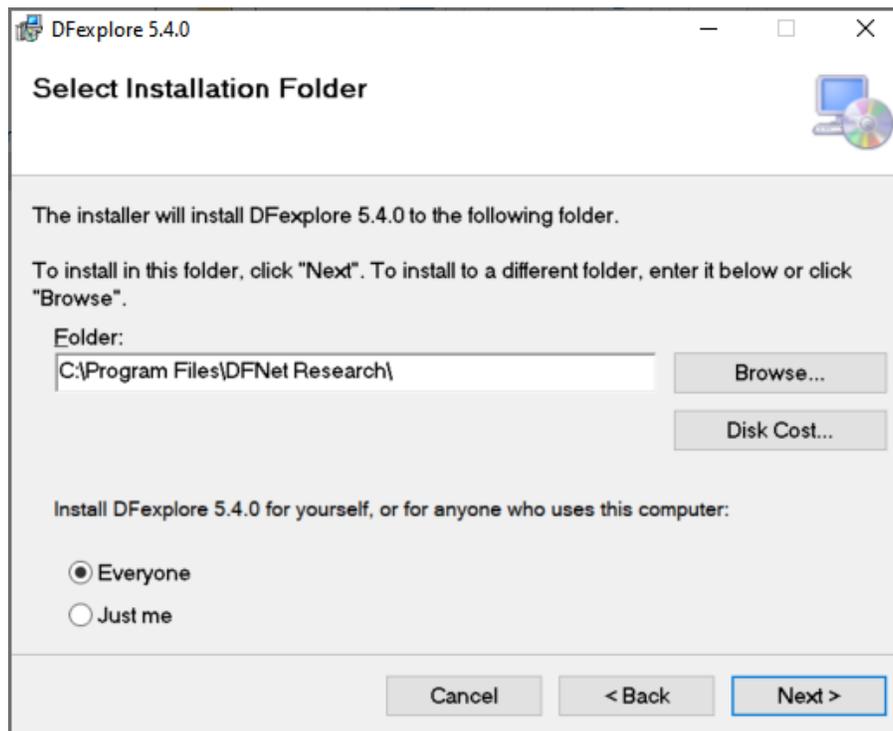
1. Download DFExplore_5_4_0.msi to your local computer, double clicking on msi file or right click and select **Install** to start installation



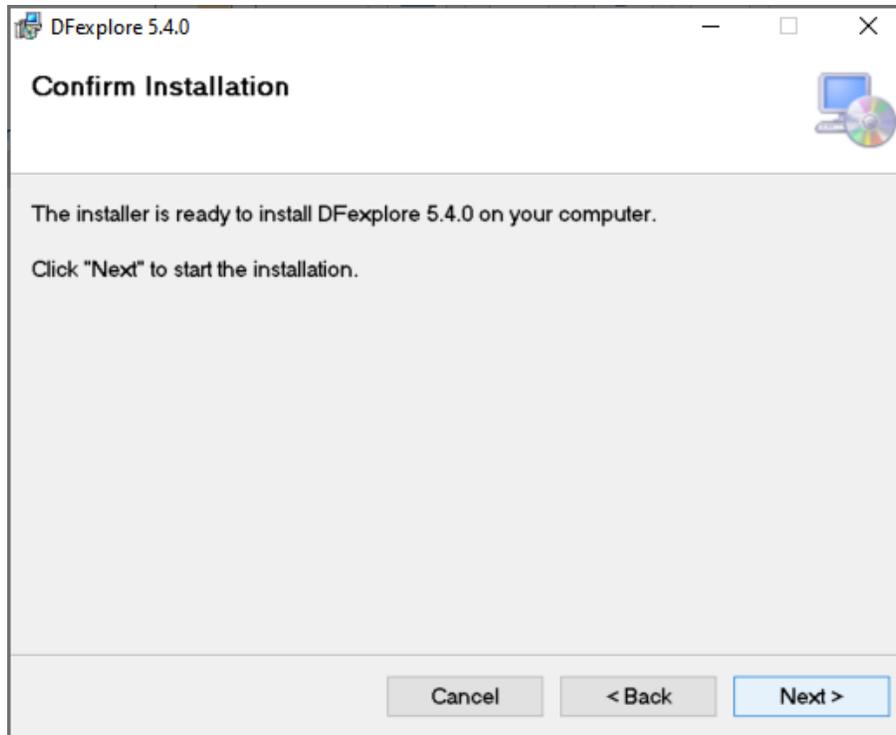
2. Click Run



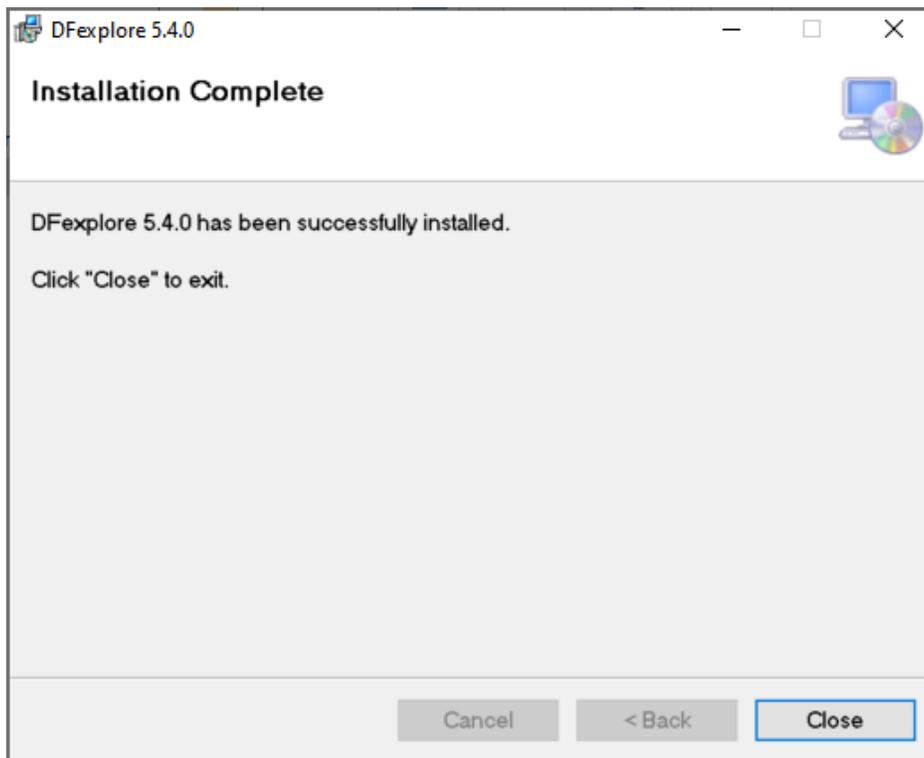
3. Click Next



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



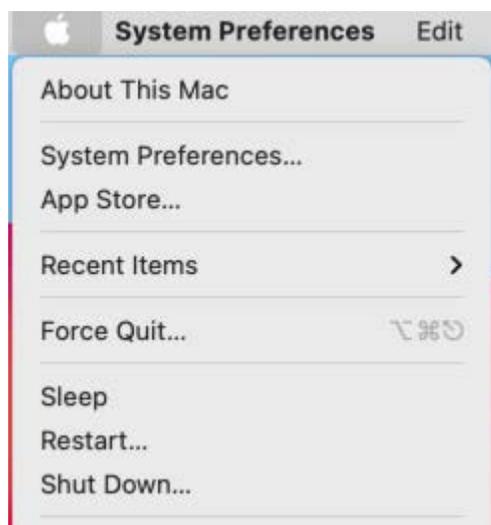
5. Click Next to start the installation



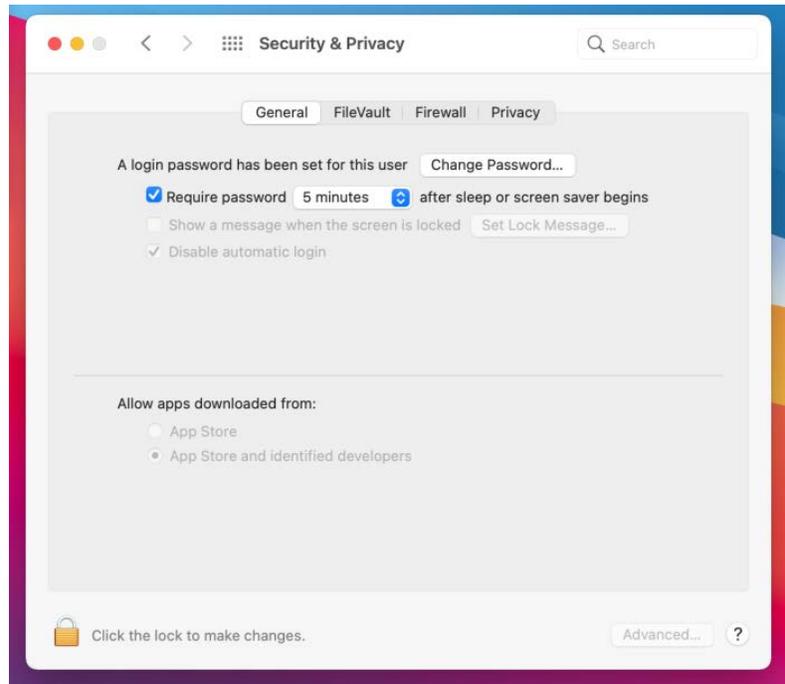
6. Click Close

DFexplore Installation Instruction for MAC

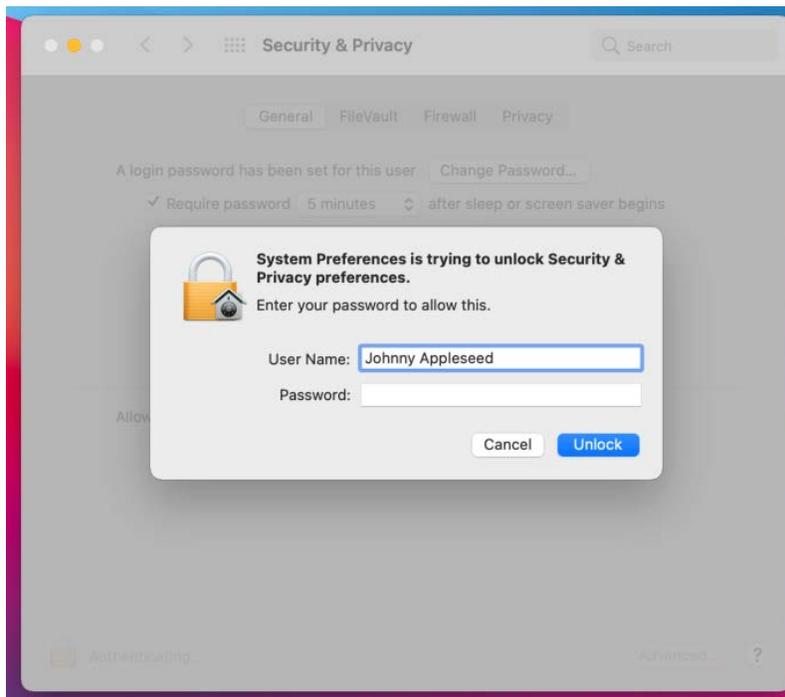
1. Download the DFexplore package file to your local computer and follow the process below
2. In the **System Preferences -> Security and Privacy** make sure you allow apps downloaded from anywhere for the duration of the package installation. If you do not have permission to make the change please contact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



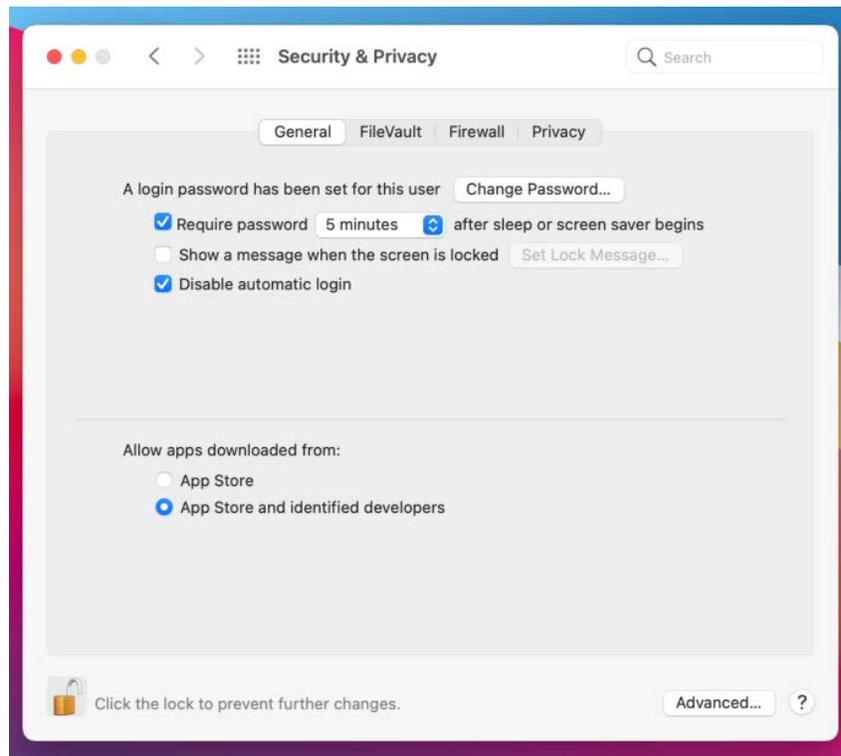
3. Select System Preferences



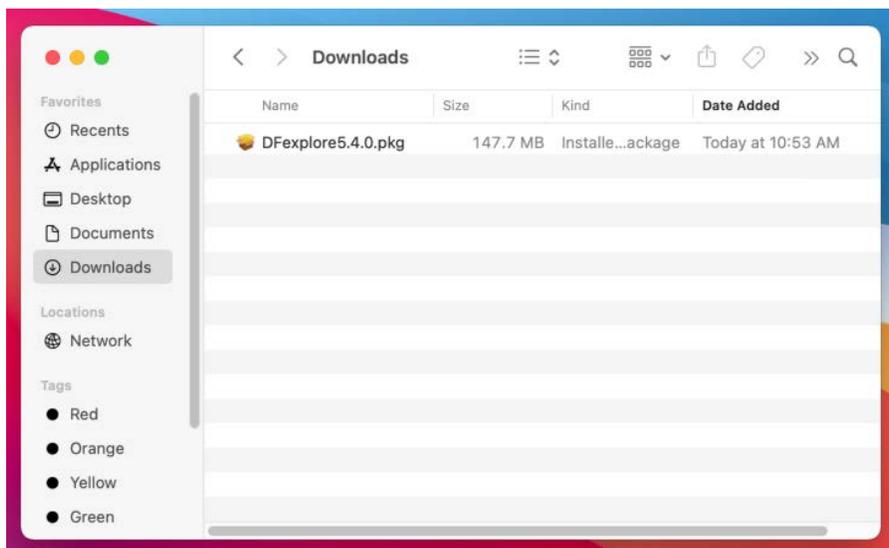
4. Click Unlock icon to make changes



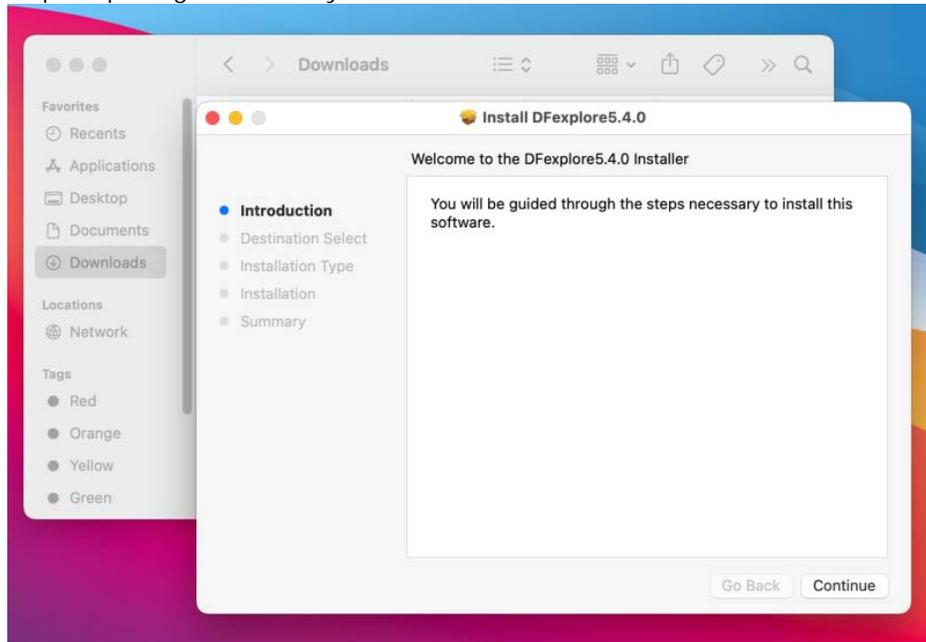
5. Type in your OSX credentials to unlock the security and privacy preferences.



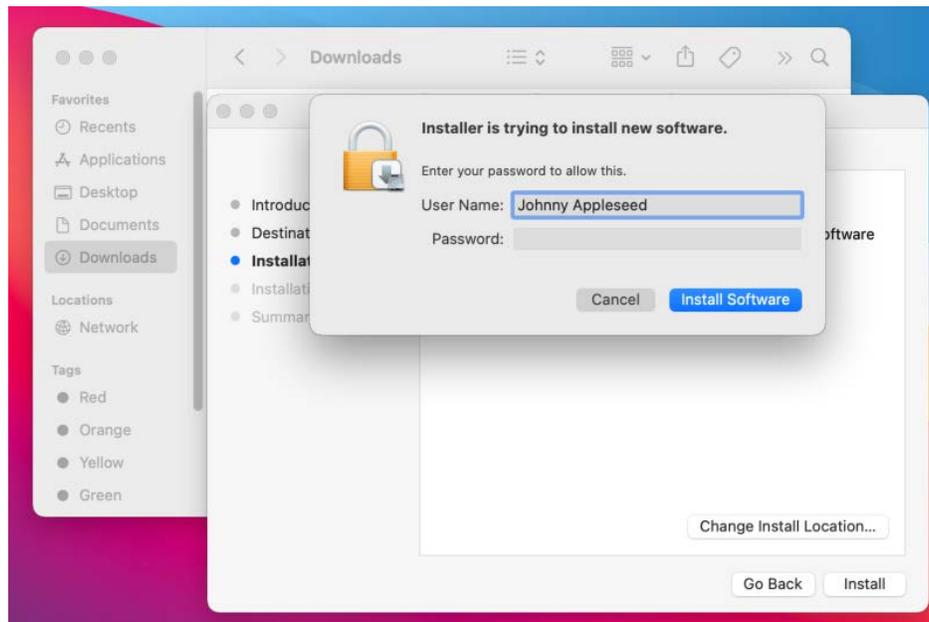
6. Select "App Store and identified developers"

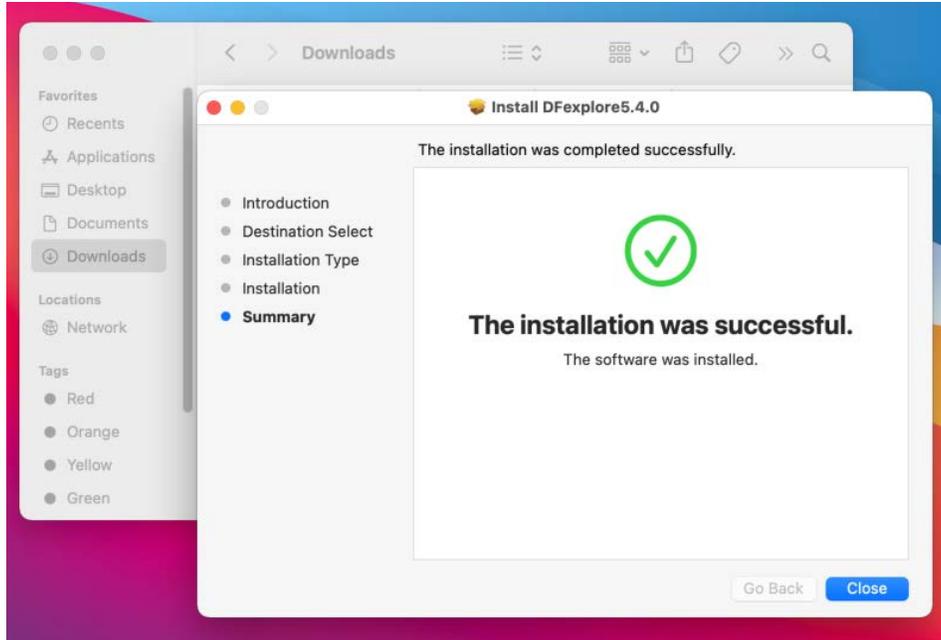


7. Run the DFExplore package located in your Downloads Folder

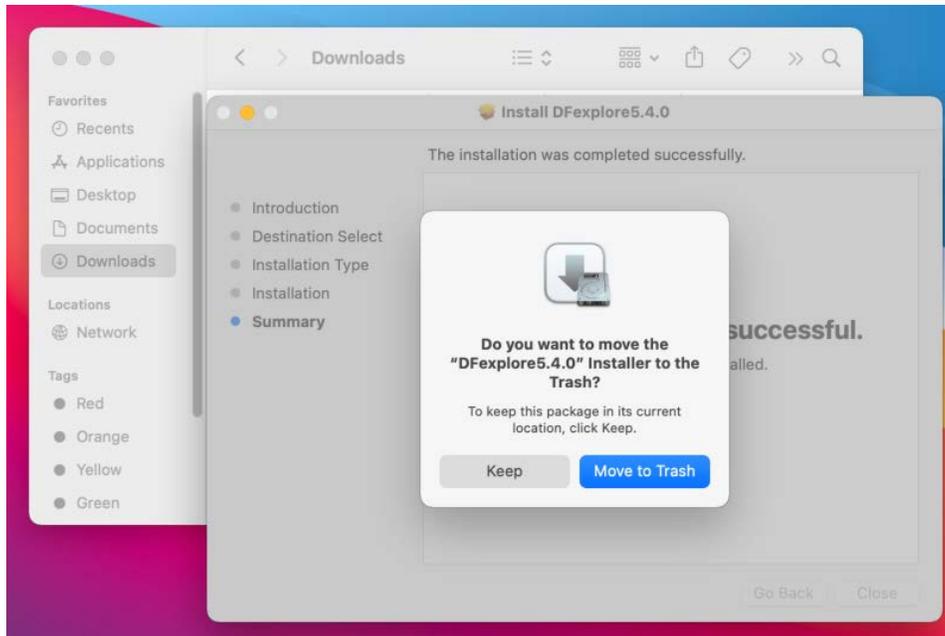


8. Type in your OSX credentials to allow the package installation. If you do not know your OSX - credentials please contact your IT department



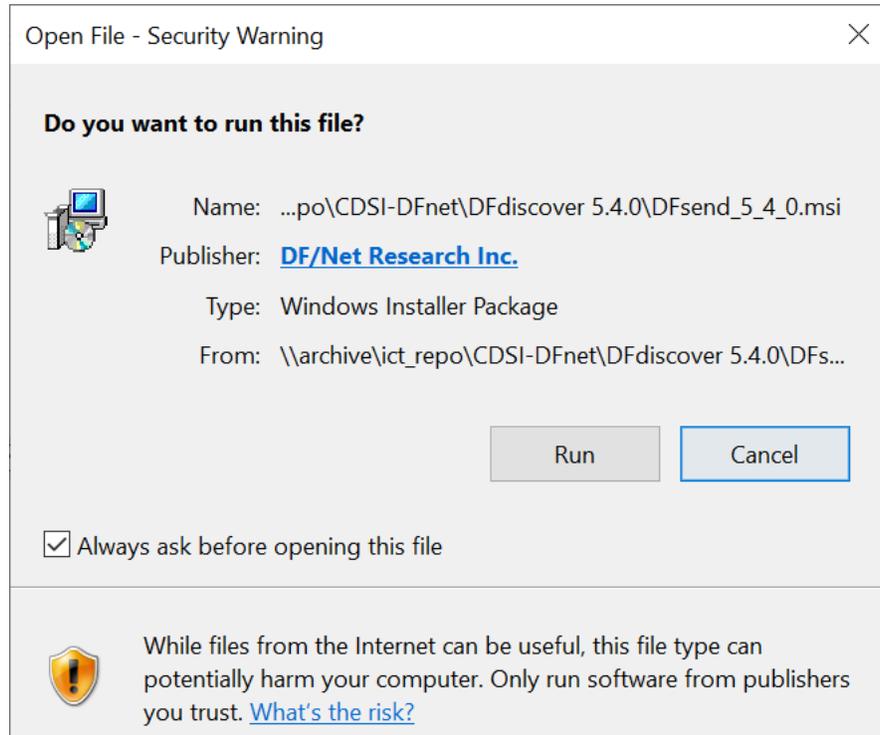


9. Click Close

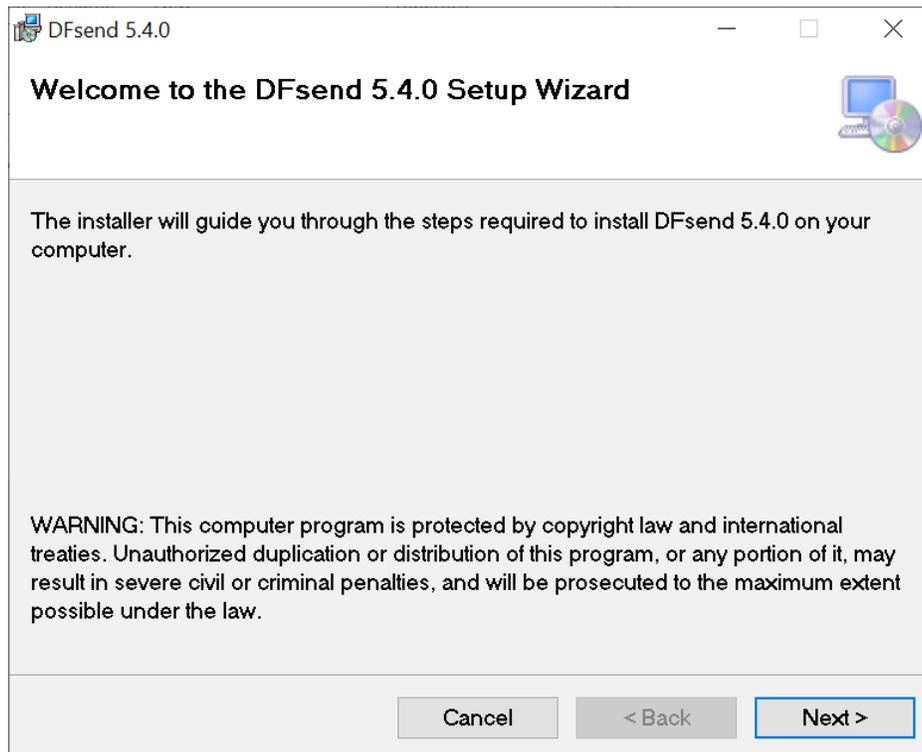


DFsend Installation Instructions for Windows

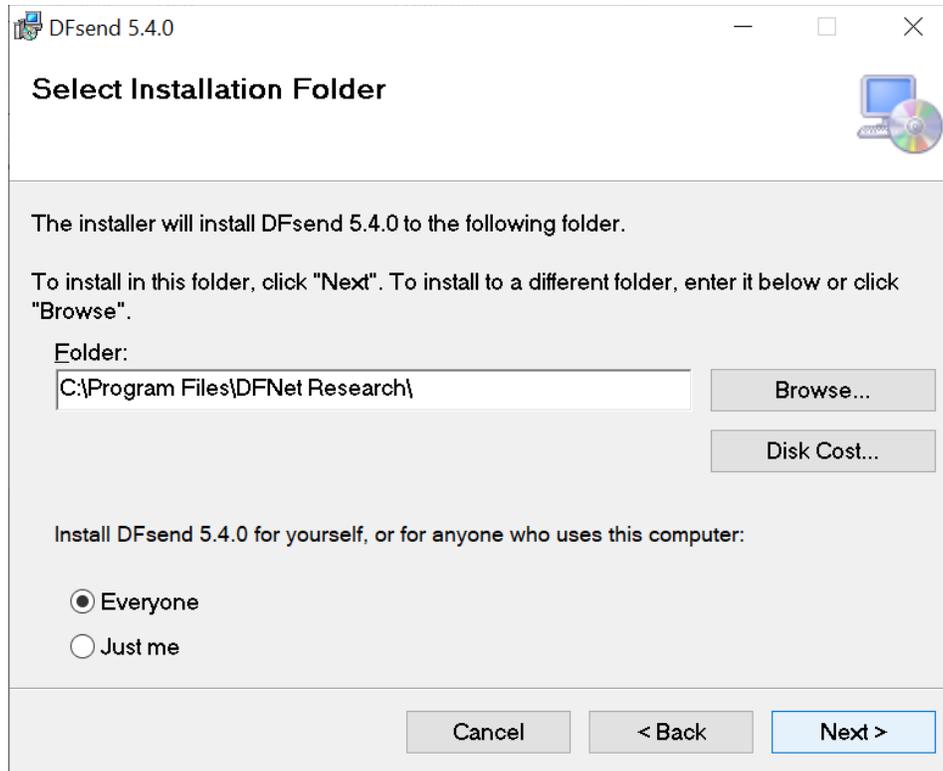
1. Download DFExplore_5_4_0.msi to your local computer, double clicking on msi file or right click and select **Install** to start installation



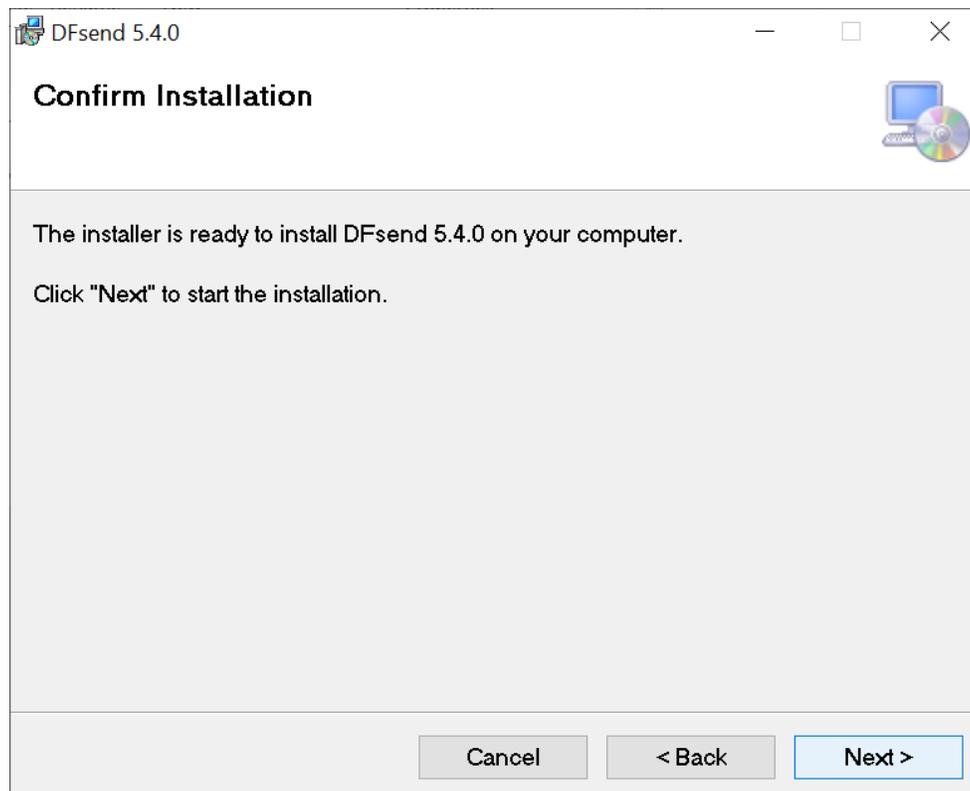
2. Click Run



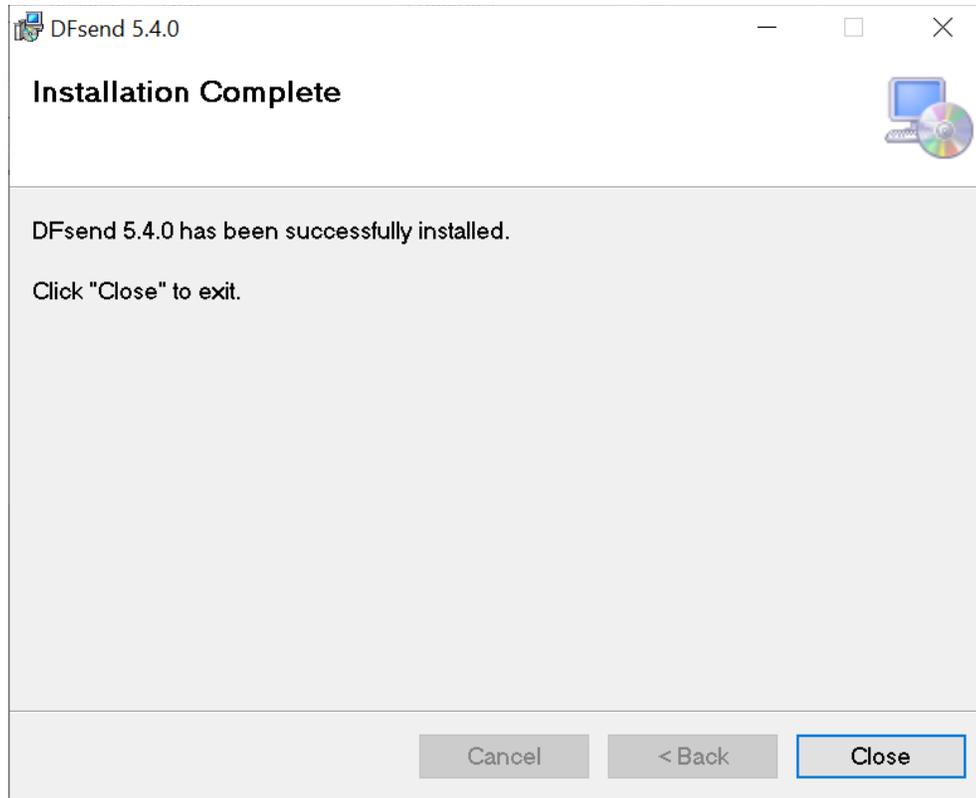
3. Click Next



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



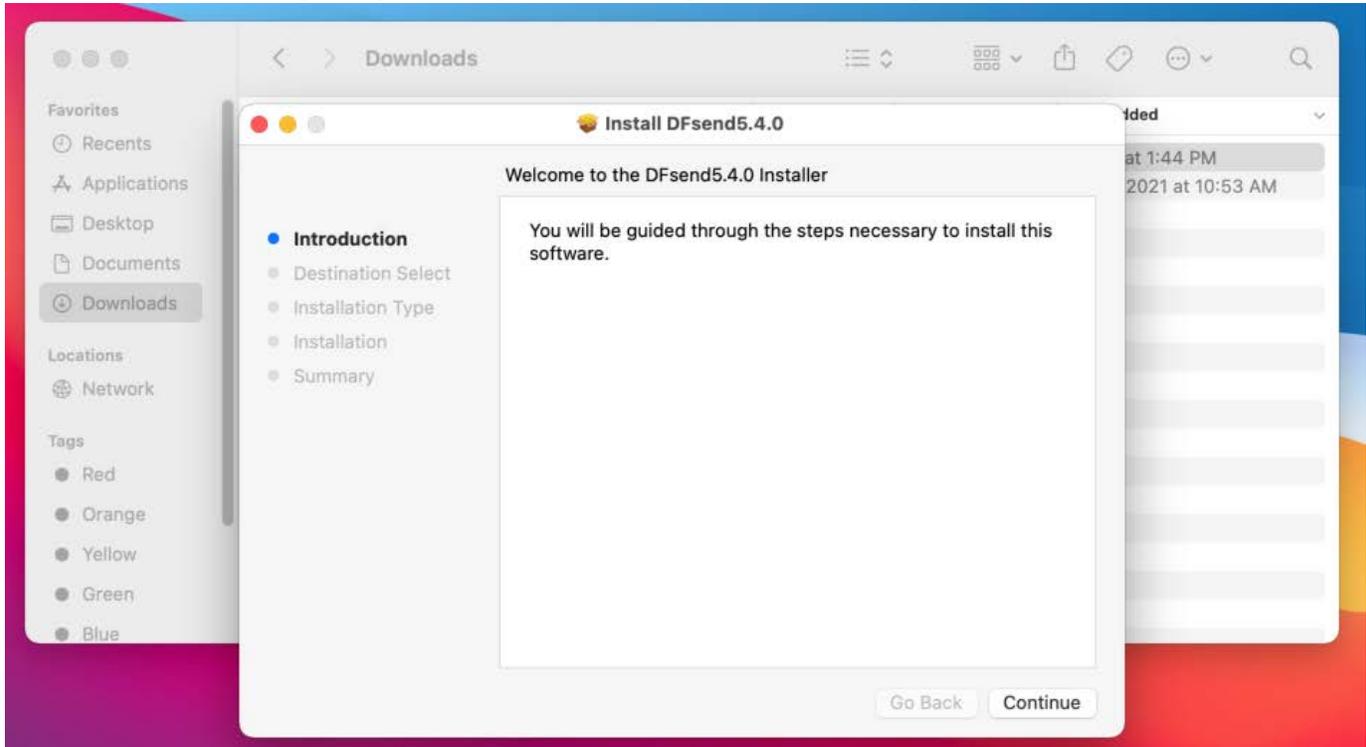
5. Click Next to start the installation



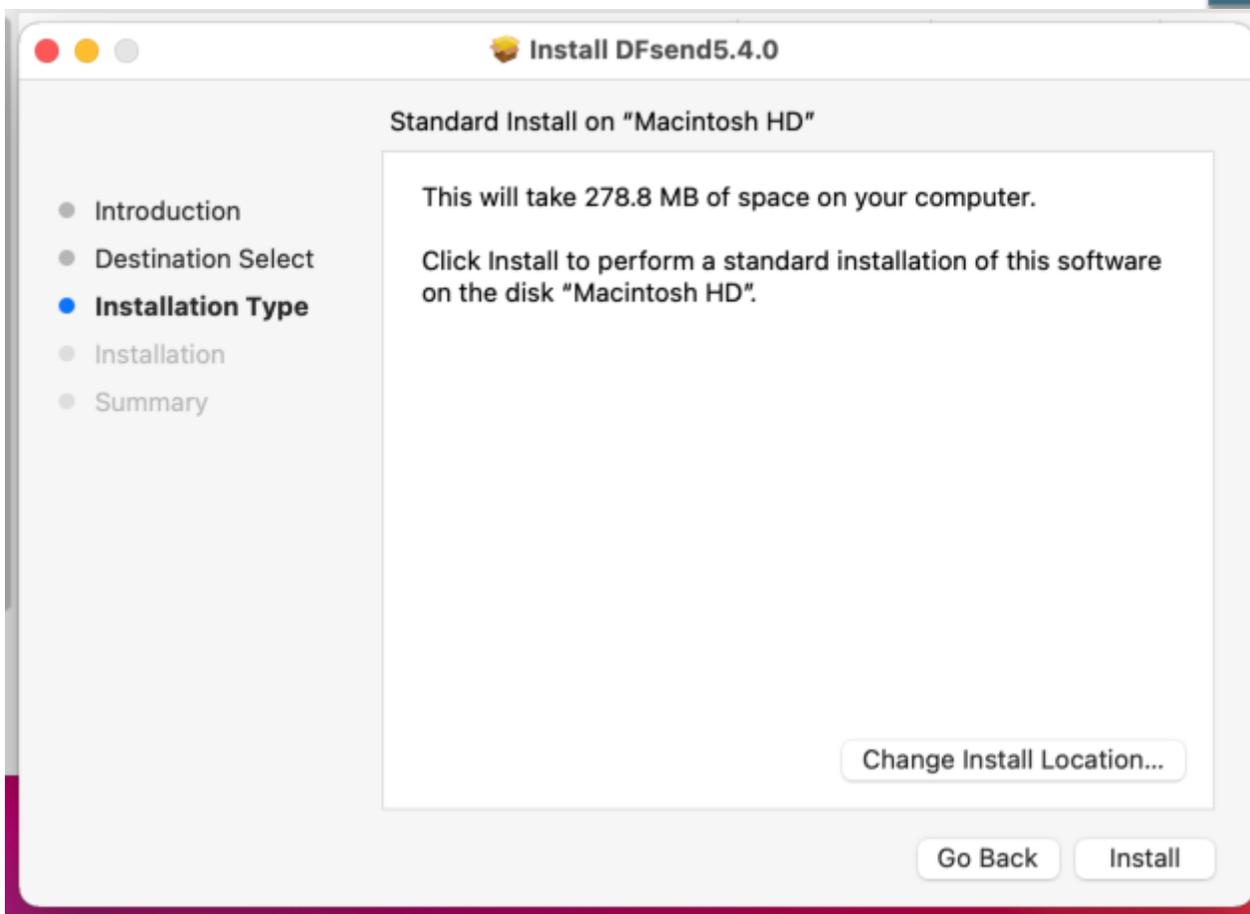
6. Click Close

DFsend Installation Instruction for MAC

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

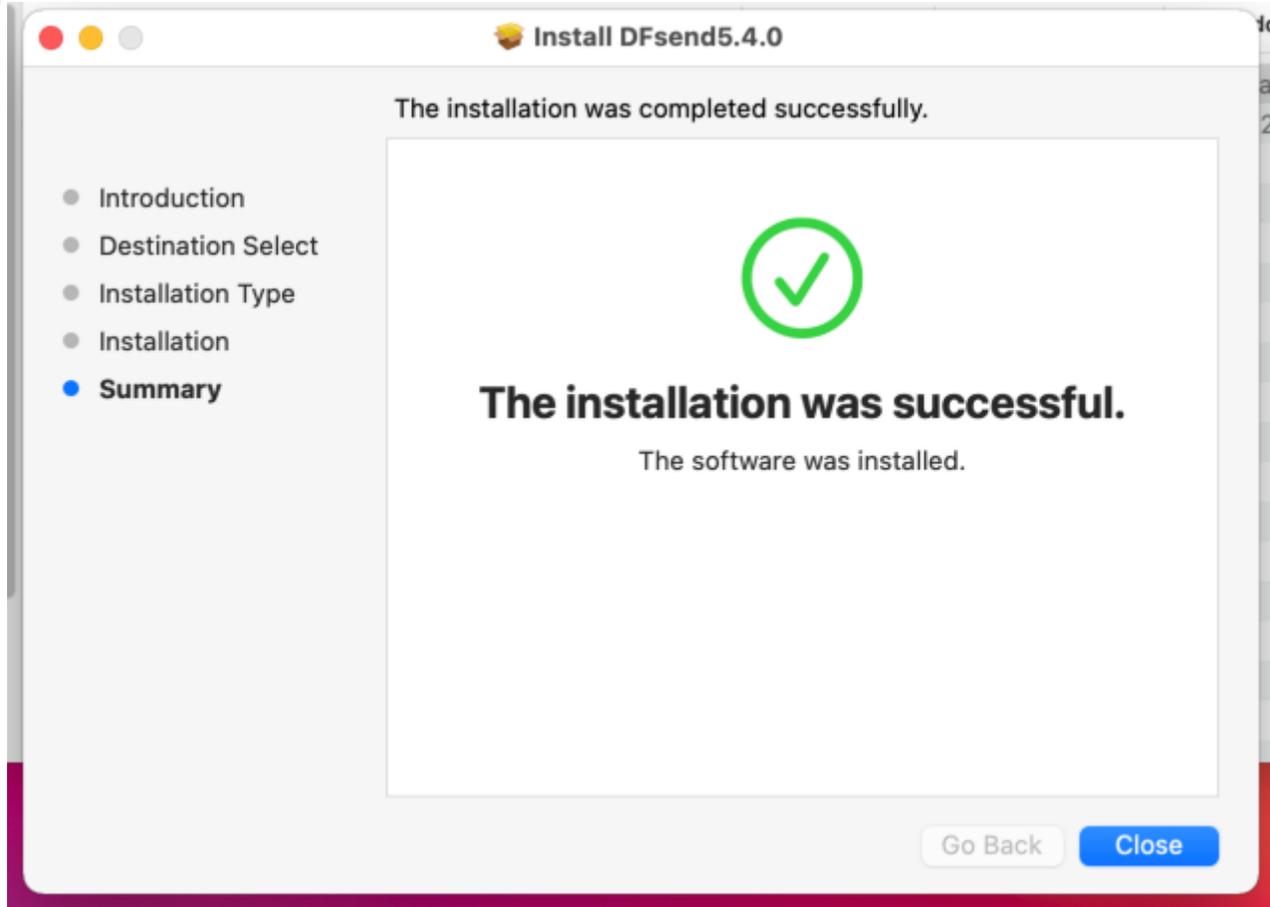


2. Click Continue



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





5. Click Close