iDataFax 2014
Troubleshooting Guide

Population Health Research Institute
HEALTH THROUGH KNOWLEDGE

Version	3.0
Modified Date	6/11/2020

Contents

This guide will take you through the requirements for running iDataFax 2014 on your local computer, how to login, how troubleshoot the most common issues, and how to request help for issues you are unable to resolve yourself.

iDataFax Summary and Installation Requirements

1. Summary

- iDataFax is a client application that connects back to a server at the Population Health Research Institute (PHRI), based in Hamilton, Ontario, Canada
- iDataFax does not store clinical data on your local computer; all information is stored centrally on the PHRI server in Hamilton, Ontario, Canada
- The iDataFax client communicates with the server over the internet using TLS technology, which provides encryption and secure identification of the server
- iDataFax 2014 supports the use of proxy servers (if they are used on your local IT network see "How to Configure Proxy Server Details" section of this guide)
- It is not known to interfere with any software, and should work on most desktops, laptops and Citrix installations (see "Minimum Computer Requirements" section below)
- The iDataFax client has no license restrictions

2. Minimum Computer Requirements

- TCP/IP Networking (512kbps internet connection speed or better)
- Operating system: Windows, Mac (versions prior to Catalina only)
    - If your MacOS version is Catalina (released in Fall of 2019), it will not support x32-bit applications like iDataFax, so please contact your PHRI Project Office and request alternate access to iDataFax (i.e. a ROAM Anyware personal account and instructions for using the ROAM Anywhere web portal to access iDataFax).
- 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 to the PHRI data server

3. Installing Multiple Copies Of iDataFax

This section applies to you if you need to use multiple versions of iDataFax for different organizations, or studies, on the same computer.

- Multiple versions of the iDataFax client can co-exist on the same computer, but they must be installed in version order (e.g. 2014.1.1 → 2014.1.2 (PHRI Version) → 2016.0.0).
- If a more current version of iDataFax client is already installed, it must be uninstalled, the previous version installed, and then later versions installed (in version order).

How to Connect to the PHRI iDataFax Server and Navigate to a Study

4. Open iDataFax, and Connect to PHRI Server

⚠ To use iDataFax, you must have a personal iDataFax account provided by PHRI. Do not share your account, or use another person's account. If you do not have an account, contact your PHRI Study Team.

4.1. Launch the iDataFax client (small login window opens)
4.2. Connect and login to the PHRI Server.
    4.2.1. In **DataFax Server** field, enter "edc.phri.ca"
    4.2.2. In **Login Name** field, enter your personal iDataFax account username
    4.2.3. In **Password** field, enter the password for your iDatafax account

4.3. Select the Login button
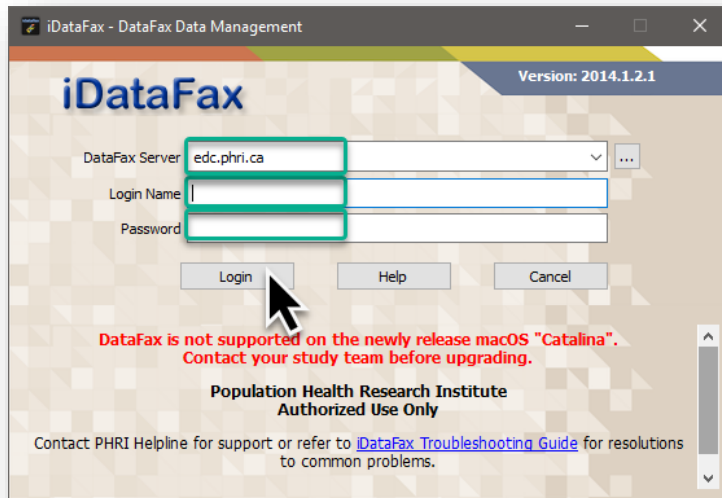
5. Open Study

5.1. (If the iDataFax client connects successfully to the server, iDataFax window will expand to include list of Studies you have access to.) Simply select the database (e.g. Study) you want to enter data for and select **OK** button.

Common Issues & How to Resolve Them

6. iDataFax Server Connection - Issues & Next Steps

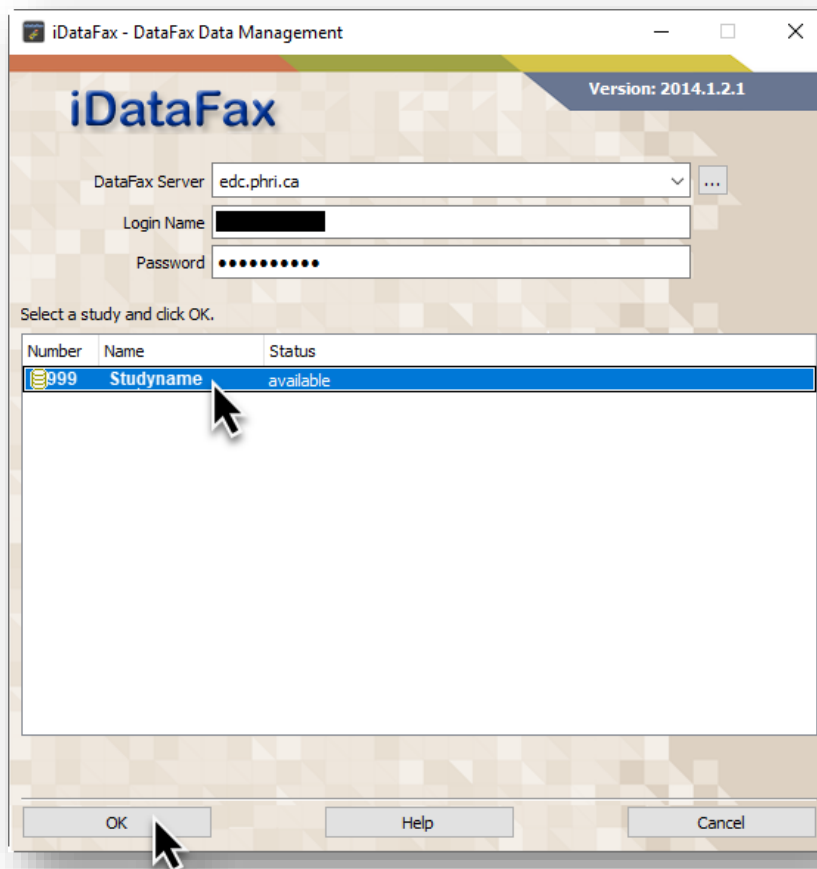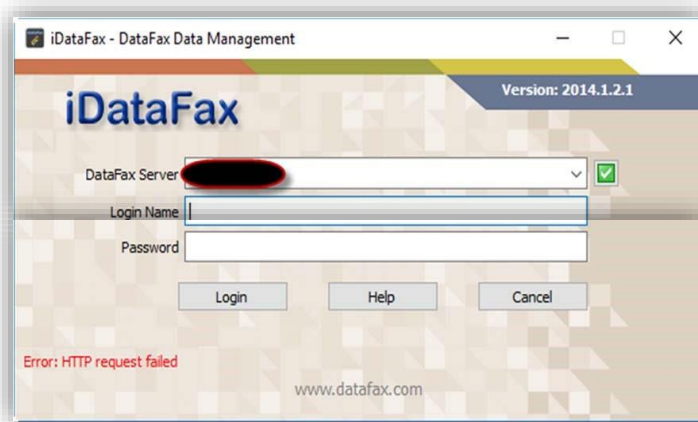If the connection or login to the iDataFax server fails, an error or information message usually appears under the **Login** button, or opens in a message window. A list of these messages (and steps to follow to correct the situation) can be found below:

6.1. Message "**Error: HTTP request failed**"

6.1.1. Please contact your Information Technology (IT) support and ask them to:

♦ Ensure that <u>port 443 is open</u> – if this is blocked purposefully by IT policy, then please contact PHRI about providing alternate method of accessing iDataFax

♦ Help you <u>configure Proxy Server settings if necessary</u> (see "How to Configure Proxy Server Details" section below)

Additional Information about the PHRI server that you IT team may require:
"edc.phri.ca" host name has an external IP address of 205.207.98.22

6.2. Message "**Server Unreachable! – Check server and/or your network connection!**"


6.2.1. Contact your IT support to <u>confirm edc.phri.ca is accessible</u> through your network.

Additional Information about the PHRI server that you IT team may require:

"edc.phri.ca" host name has an external IP address of 205.207.98.22

6.2.2. If edc.phri.ca is accessible through your network, please perform the steps in <u>How to Report Ongoing Issues and Obtain Additional Support</u> section below.

6.3. Message "**Error: Authentication required**"
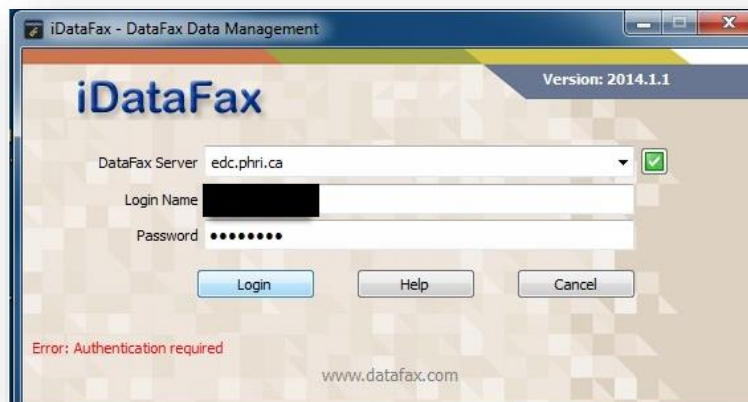
6.3.1. You are likely using a proxy server (indicated by the green check box beside the **DataFax Server** field) and the <u>password within the proxy server window is not correct</u>.

6.3.2. Contact you IT support for the new proxy server settings.

6.3.3. Update the proxy server information in iDataFax. Select the ☑ (green checkbox) button > ('Configure Proxy Server' window opens) > enter the

correct information > select OK button to save the new setttings, then try to login to iDataFax again.

6.4. Message window "**Could not confirm the identity of the host 'edc.phri.ca**"

6.4.1. DataFax uses a "self-signed" certificate. Many IT departments increase <u>security to not trust "self-signed" certificates</u>. If this is the configuration for your IT network, the system message window reports that "**The root certificate of the certificate chain is self-signed, and untrusted**."

6.4.2. To resolve this, please contact your IT support ask them to create an exception in their rules for the PHRI DataFax server 'edc.phri.ca' and send them the details in the message window. If your IT support is unable to fulfill this request, contact your PHRI Project Office and request alternate access to iDataFax (i.e. a ROAM Anyware personal account and instructions for using the ROAM Anywhere web portal to access iDataFax).

6.5. Message "**This client software is not compatible with this server**"

6.5.1.   Please <u>check the iDataFax version number</u> as highlighted in the above image

6.5.2.   If you are not using using iDataFax version 2014.1.1 or 2014.1.2, you will need to download and install version 2014.1.2 – please contact your IT support if you need assistance with this (and refer to <u>Section 3 Installing Multiple Copies Of iDataFax</u> if you need to use different versions of iDataFax for other organizations or Studies)

6.6. Windows hourglass (or spinning wheel), eventually message windows states "**Waiting for server to complete...**"
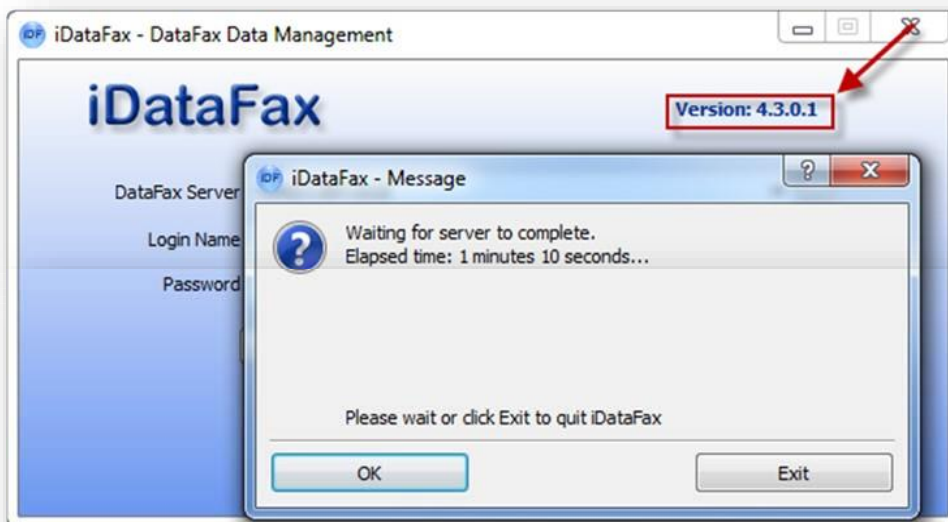
6.6.1.   You are likely using the <u>wrong version of iDataFax </u>client.   Select **Exit** button to close the window and connect using iDataFax 2014.1.1 or 2014.1.2 – see

Section 6.5 above.

6.7. Message "**Authorization Failed- incorrect login name or password**
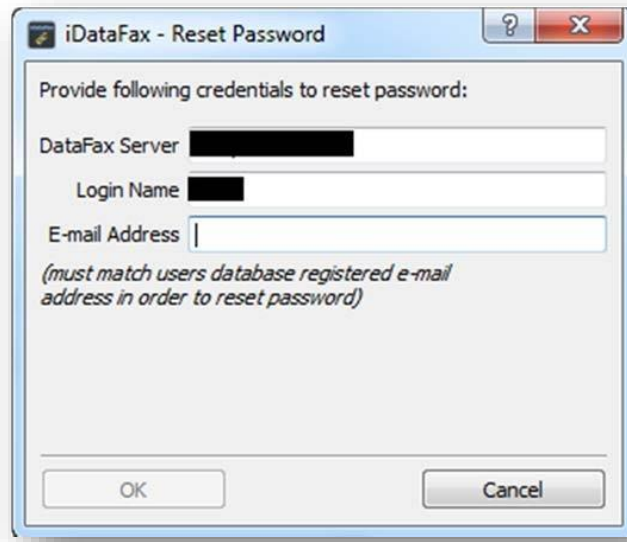
6.7.1. This indicates the login name and/or password is incorrect, use the password reset feature within iDataFax to reset password as shown below or contact the Study Helpline to reset your password.

6.7.2. Use the iDataFax password reset feature:

➢ Enter DataFax Server and Login Name > select Help button > select Password Reset from the Help dropdown
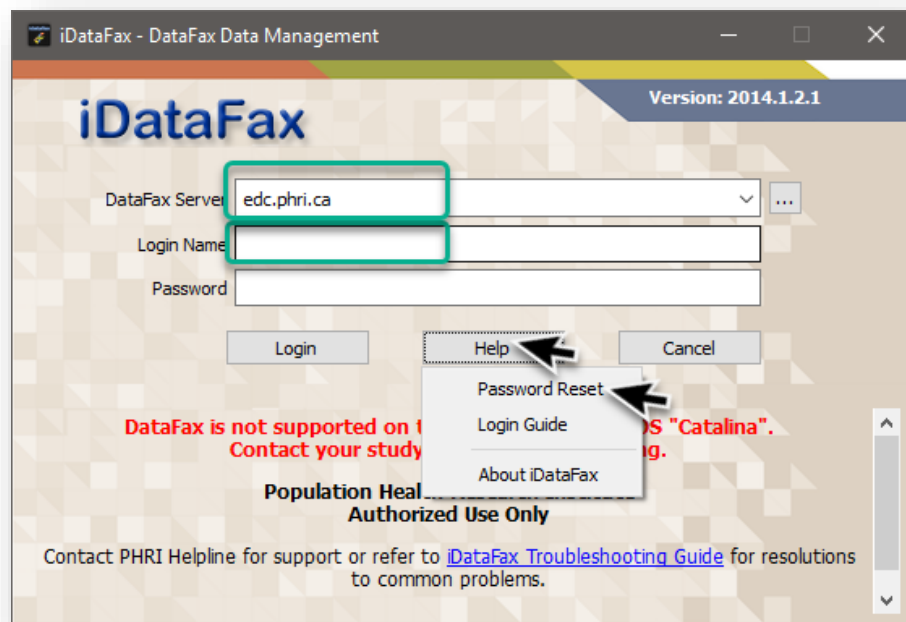
> ➢ Enter the E-mail Address registered to your iDataFax account > click OK

Temporary password will be emailed to your registered email address

7. Opening a Study - Issues & Next Steps

If you have selected a Study from the list and **OK** button, the iDataFax window does not change to display the Study, and an error or information message app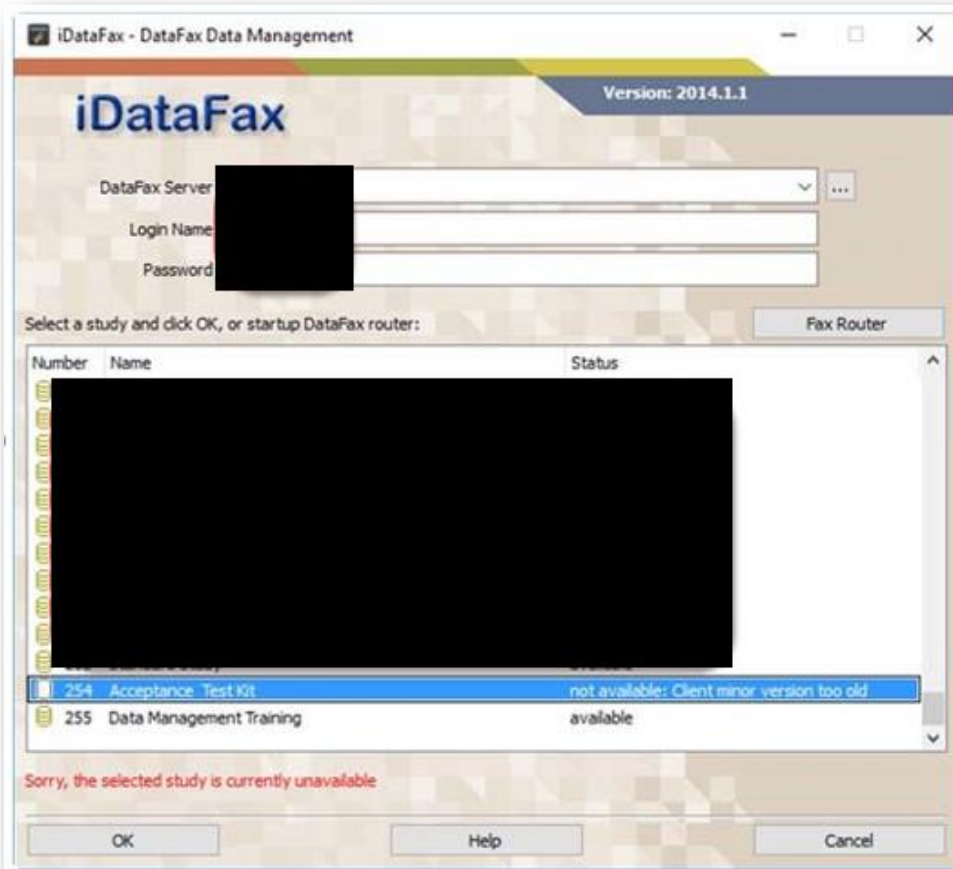ears under the list of Studies, please find the issue message or description in the list below and follow the listed steps to correct the situation:

7.1. Message "Sorry, the selected study is currently unavailable" with the status "not available: Client minor version too old"

7.1.1. You are likely using an older version of the iDataFax client. First make sure that you are using iDataFax 2014.1.2.1. If you still get the same error, contact the PHRI Project Office to confirm the client version configured for your Study.

7.2. Consistant **connection lag**, **unable to open patient binders after logging in**, or **iDataFax client closes suddenly** after long time trying to connect

7.2.1. Performance issue with iDataFax 2014.1.1 is caused by the audio/video handler (Phonon plugin). Disabling audio/video handler will not impact our existing studies as we are not collecting audio/video files in any of our existing studies. Please follow the steps below to remedy the issue.

7.2.2. Download the latest iDataFax version 2014.1.2 from PHRI download page https://rome.phri.ca/files/idatafax/ - please contact your IT support for assistance with next steps if you need permission to install and uninstall applications on your computer (and refer to Section 3 Installing Multiple Copies Of iDataFax if you need to use different versions of iDataFax for other organizations or Studies)

7.2.3. Uninstall existing iDataFax 2014.1.1

7.2.4. Re-install iDataFax using the .msi file downloaded in step 5.7.6

How to Report Ongoing Issues and Obtain Additional Support

If your **connection to the iDataFax server is failing or the iDataFax client is operating abnormally** (and your **situation is not addressed in the 'Common Issues & How to Resolve Them' section** above), please follow the steps below to test and gather information about your connection to PHRI iDataFax server. Each step asks you to record information that you need to report to PHRI support (and/or your local computer/internet Support) so that the support team(s) can find the issue and resolve it. (NOTE: If you need assistance with these steps on your computer, please contact your local IT support team.)

8. Determine your computer network addresses at the time you are experiencing the issue (helps support teams trace connection attempts from your computer in their logs)

8.1. Determine your computer external (public) IP address

Visit a web site that gathers your public (or external) IP address - http://whatismyipaddress.com or http://www.showmyip.com, and the site will display the information similar to the screenshot below. **Record this information as the "Public IP Address:" in a draft email that you will send to PHRI support. (NOTE: Instructions for sending to PHRI support team are below the series of information gathering steps)**

8.2. Determine your computer local IP address

Using a Microsoft Windows computer:

8.2.1. Open a Command Prompt window. Select **Start** menu > select **Run** option (or type **R** and then select **Run** option)> (Run window opens) type **cmd** and select **OK** button.

8.2.2. (Command Prompt window opens) Type `ipconfig` (no spaces), then **<Enter>**

8.2.3. Proceed to the next ('Determine if EDC.PHRI.CA can be 'found'…') step, where you will continue to use the Command Prompt window to gather information.

9. Determine if EDC.PHRI.CA can be 'found' (resolved) by your computer
   (helps support teams identify whether the connection is failing because your computer can't find the 'address' of the PHRI server)

Using a Microsoft Windows computer:

9.1. Continuing in the same Command Prompt window, type `nslookup edc.phri.ca` (exactly as written), then **<Enter>**

> 9.1.1. If the information that displays looks like the following, then <u>you cannot 'find' (resolve) edc.phri.ca from your computer</u> and your information gathering is complete for now.

```
C:> nslookup edc.phri.ca
Server: <name of local DNS server>
Address: <address of local DNS server>

*** <name of local DNS server> can't find edc.phri.ca: Non-existant domain
```

> Next steps: Please **contact your local IT support to determine why your "computer is unable to locate the PHRI iDataFax server address 'EDC.phri.ca' ".   If you are able to email your local IT support team, we recommend that you paste all text from the Command Prompt window into the email draft you were preparing for PHRI support and send it to your local IT team instead. It may also help to refer them to this user guide if they have additional questions about what the edc.phri.ca server is for**. (To copy/paste the infomormation into your email draft, select anywhere within the Command Prompt window and typing **Cntrl + A** keyboard keys at the same time (to Select All text), then type <**ENTER**> (to Copy the selected text to clipboard). In your email draft, select where you would like to paste the text, and type **Cntrl + V** keyboard keys at the same time.)

> 9.1.2. If the information that displays looks like the followings, then you <u>can successfully 'find' (resolve) edc.phri.ca</u> from your computer. Please proceed to the next ('Trace the Route…') step using the Command prompt window.

```
C:\nslookup edc.phri.ca
Server: <name of local DNS server>
Address: <address of local DNS server>

Name:  edc.phri.ca
Address: 205.207.98.22
```

10. Trace the route from your computer to EDC.PHRI.CA
    (helps support teams identify if your connection is failing due to firewall interference)

Using a Microsoft Windows computer:

10.1.   Continuing in the same Command Prompt window, type `tracert edc.phri.ca` (exactly as written), then **<Enter>**

10.2.   (The displayed information describes the communication path between your computer and the PHRI iDataFax server, and all of the various computers and network devices that

make up the path) The trace may take a few seconds and will look something like the following.

```
C:\>tracert edc.phri.ca
Tracing route to edc.phri.ca [205.207.98.22] over a maximum of 30 hops:
<1 ms    <1 ms    <1 ms   10.1.50.1
<1 ms    <1 ms    <1 ms   72.35.6.92
<1 ms    <1 ms    <1 ms   216.176.48.245
<1 ms    <1 ms    <1 ms   hr2-ge-5-0-6.tr1.savvis.net [206.150.72.22]
<1 ms    <1 ms    <1 ms   hr1-xe-7-0-0.tr1.savvis.net [204.70.224.137]
1 ms     1 ms     1 ms    esr1-xe-8-0-0.tr2.savvis.net [204.70.224.109]
4 ms     2 ms     2 ms    204.70.207.245
12 ms    12 ms    12 ms   cr2-xe-3-2-2.jfk2.savvis.net [204.70.195.126]
12 ms    12 ms    12 ms   pr1-xe-9-2-3.jfk2.savvis.net [206.28.99.206]
13 ms    13 ms    13 ms   xe-0-3-0-34.r05.nycmny01.us.bb.gin.ntt.net [129.250.66.81
Trace complete. |
```

10.3. **Please copy all the Command Prompt information into your draft email to PHRI Support, and proceed to the next ('Confirm a secure connection...') step**. (To copy/paste the information into your email draft, select anywhere within the Command Prompt window and typing **Cntrl + A** keyboard keys at the same time (to Select All text), then type <**ENTER**> (to Copy the selected text to clipboard). In your email draft, select where you would like to paste the text, and type **Cntrl + V** keyboard keys at the same time.)

11. Confirm a secure connection is available
(helps support teams identify if your connection is failing due to the inability to create a secured connection with the PHRI server)

Using a Microsoft Windows computer:

11.1. Continuing in the same Command Prompt window, type `telnet edc.phri.ca 443` (exactly as written), then **<Enter>**

    11.1.1.   If the displayed result looks like the following there is no cause for concern – this simply means that the command we tried to use for investigation is not available on your computer.

```
C:\ >telnet edc.phri.ca 443
'telnet' is not recognized as an internal or external command,
operable program or batch file
```

    11.1.2.   If the you do not get any response (no blinking cursor appears in the window), or a timeout message appears, this would indicate that the specific port required is not available. **Please record the "Failed telnet edc.phri.ca 443" details (including the exact wording of any timeout message) in your draft email to PHRI support.**

    11.1.3.   If the text within the Command Prompt window clears and a blinking white cursor appears, this indicates a successful connection with the TLS port (443) that iDataFax uses for secure communications.   You can confirm this is a successful connection result by pressing the [Enter] key – a response should show within the window (even if it doesn't make much sense!). **Please record the "Successful telnet edc.phri.ca 443" in your draft email to PHRI support.**

11.2. Click on the upper right 'x' in your Command Prompt window to to close it, and **proceed to the "Report collected details to PHRI Support...' section.**

12. How to contact PHRI Support

12.1. Complete your email to PHRI Support with the following details and Send the email.

   12.1.1. **To**: PHRI.ICTHelpDesk@phri.ca

   12.1.2. **Subject**: iDataFax Troubleshooting

   12.1.3. **Message**:

   Your full name, e-mail address, and phone number, time zone and time(s) we can contact you; and any PHRI designations for your work, like Study #, Site #, iDataFax user account name; and

   Description of what you see when iDataFax isn't connecting or isn't working as expected

   All the data you collected in the draft email by completing troubleshooting steps 8-11 in this User Guide

12.2. If you are unable to use email to contact PHRI, please contact us by phone at the **PHRI Helpline number** and **select Option 2 for IT Support.**

13. Check Network Performance
(helps support teams identify if your connection is failing due to the internet or network resources available to your computer)

13.1. If the previous steps are successful but you have inconsistent connectivity or performance problems with your iDataFax connection then we need to check if your computer's internet connection is reasonably fast and reliable enough for iDataFax to transmit data to and forom the PHRI DataFax server in Hamilton, Ontario, Canada.

13.2. Please go to one of following free and accessible web sites: www.speedtest.net or www.pingtest.net

   13.2.1. After connecting to www.speedtest.net with any web browser you should see the following screen:
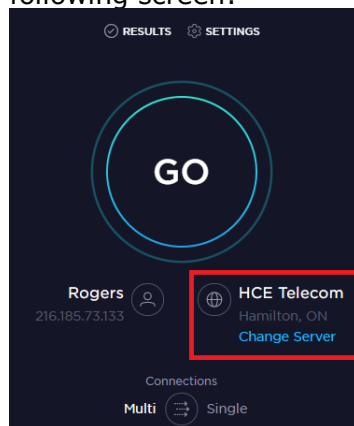
   - Select **Change Server** and select the one in **Hamilton, ON** – HCE Telecom
   - Select **Go** icon (connection test will run)

13.2.2. Record the results from the results page in your connection results document/email draft:
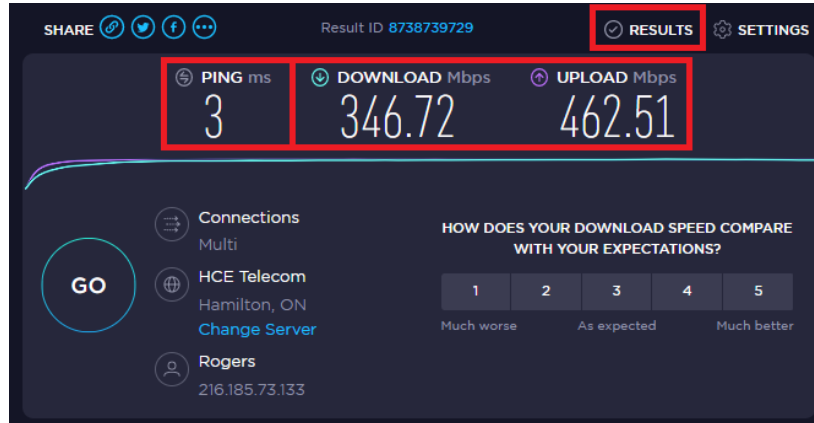
- Record the "**Download Mbps**" value (the speed of data transfer to your computer from Hamilton, ON server; should be at least 0.5Mbps (512kbps) or better in order to maintain proper performance in iDataFax)
- Record the "**Upload Mbps**" value (the speed of data transfer from your computer to the Hamilton, ON server; should be at least 0.5Mbps (512kbps) or better in order to maintain proper performance in iDataFax)
- Record the "**Ping ms**" value (time in milliseconds to send a signal from your computer to the server and back to your computer again; should be a low value and there should be no reports of lost packets/signals in order for iDataFax to operate reliably)

13.2.3. Please send the recorded the results to your local IT support and work with them to resolve any issues related to either lost ping packets or Internet performance issues.
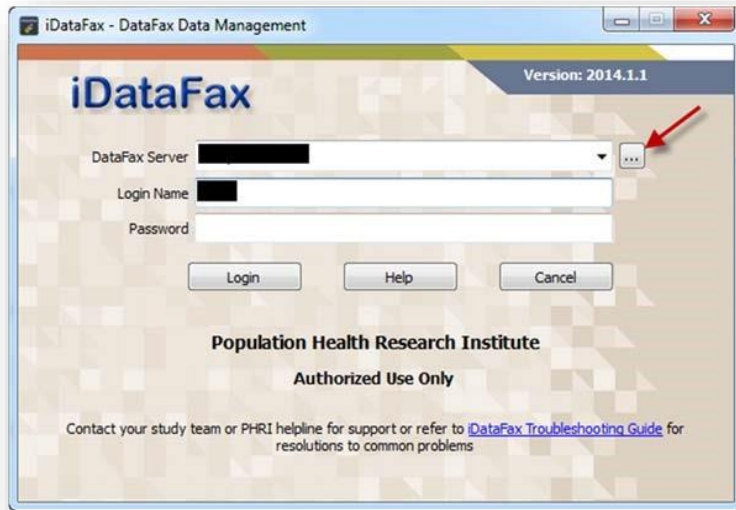
How to Configure Proxy Server Settings

If you have determined that your IT department has installed a proxy server (to filter requests sent to other servers on the internet), follow these instructions to register the proxy server in iDataFax.

14. Enter Proxy Settings

13.1. Start the iDataFax 2014 client and the following window appears

13.2. Click on the [...] button next to the DataFax server name to get the following window to appear
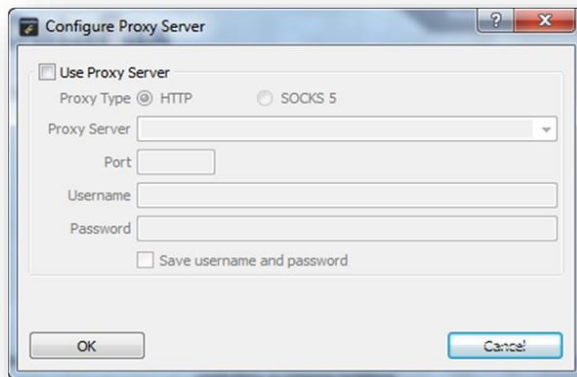
13.3. In this window, check off the "Use Proxy Server" check box to have the proxy server settings become active.


13.4. The settings that you choose for the proxy server are dependent upon your specific environment. Contact your IT support staff to get the proper settings for the following window. *The "mycompanyproxy.domain.com" in the screenshot is just an example*.

Note:

• If you were previously using Proxycap, then you can use the same settings configured for Proxycap for the iDataFax proxy settings. You should not configure Proxycap to help proxy iDataFax 2014 client connections.

• Username and Password is your local username and password that is provided by your IT department to login to your local computer/network. Note: It is **not the iDataFax login name and password** provided by PHRI.

13.5. After adding your proxy server information, click on OK and then you will see the following iDataFax 2014 window
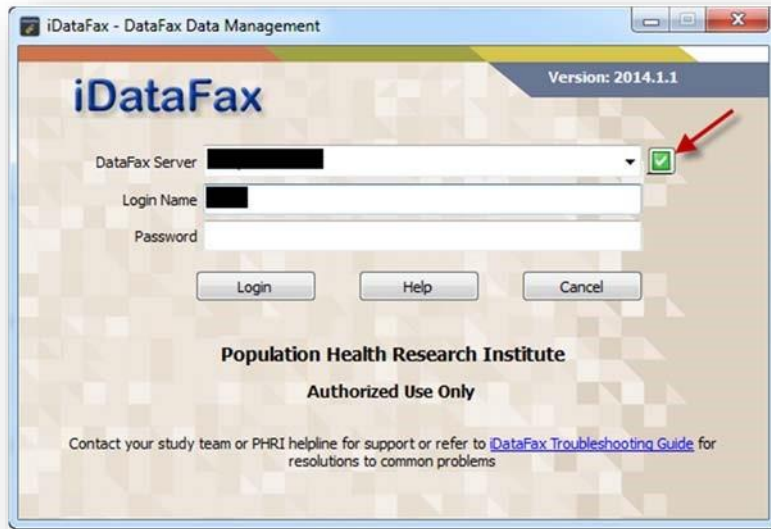
Notice that the [...] button has changed to appear as [✓].
This indicates that a proxy server has been configured to be used in the iDataFax 2014 client program.

15. Edit or remove your Proxy Server Settings

14.1. To modify or remove the Proxy settings, simply select the [✓] (green checkbox) button > ('Configure Proxy Server' window opens) > enter the correct information > select OK button to save the new setttings, then try to login to iDataFax again.