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Contents

This guide will take you through the requirements for running DFexplore 5.4 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.

- Contents 1
- DFexplore Summary and Installation Requirements** 2
 - 1. Summary 2
 - 2. Minimum Computer Requirements 2
 - 3. Installing Multiple Copies of DFexplore 2
- How to Connect to the PHRI DFexplore Server and Navigate to a Study** 2
 - 4. Open DFexplore, and Connect to PHRI Server 2
 - 5. Open Study 3
- Common Issues & How to Resolve Them** 4
 - 6. DFexplore Server Connection - Issues & Next Steps 4
 - 7. Opening a Study - Issues & Next Steps 7
 - 8. Working in a DFexplore - Issues & Next Steps 7
- How to Report Ongoing Issues and Obtain Additional Support** 7
 - 9. 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
 - 10. 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) 8
 - 11. Trace the route from your computer to edc.phri.ca (helps support teams identify if your connection is failing due to firewall interference) 9
 - 12. 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) 10
 - 13. How to contact PHRI Support 11
 - 14. Check Network Performance (helps support teams identify if your connection is failing due to the internet or network resources available to your computer) 11
- How to Configure Proxy Server Settings** 12
 - 15. Enter Proxy Settings 13
 - 16. Edit or remove your Proxy Server Settings 15

DFExplore Summary and Installation Requirements

1. Summary

- DFExplore (formerly called iDataFax) is a client application that connects back to a server at the Population Health Research Institute (PHRI), based in Hamilton, Ontario, Canada
- DFExplore does not store clinical data on your local computer; all information is stored centrally on the PHRI server in Hamilton, Ontario, Canada
- The DFExplore client communicates with the server over the internet using TLS technology, which provides encryption and secure identification of the server
- DFExplore 5.4 supports the use of proxy servers (if they are used on your local IT network see “[How to Configure Proxy Server Settings](#)” 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 DFExplore client has no license restrictions

2. Minimum Computer Requirements

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

3. Installing Multiple Copies of DFExplore

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

- Multiple versions of the DFExplore client can co-exist on the same computer

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

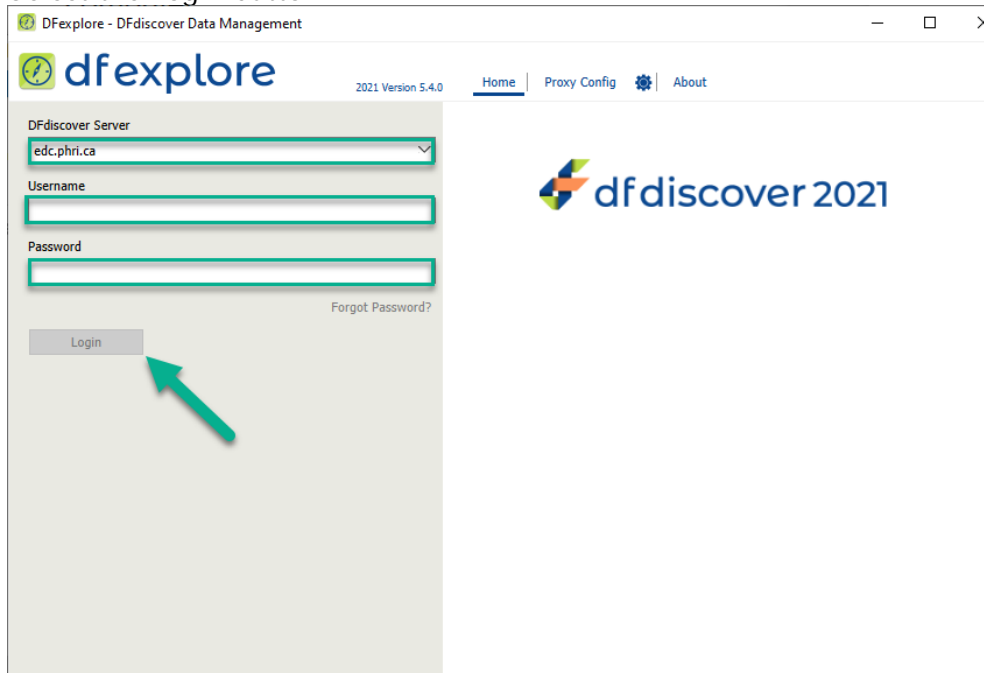
4. Open DFExplore, and Connect to PHRI Server



To use DFExplore, you must have a personal DFExplore 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.

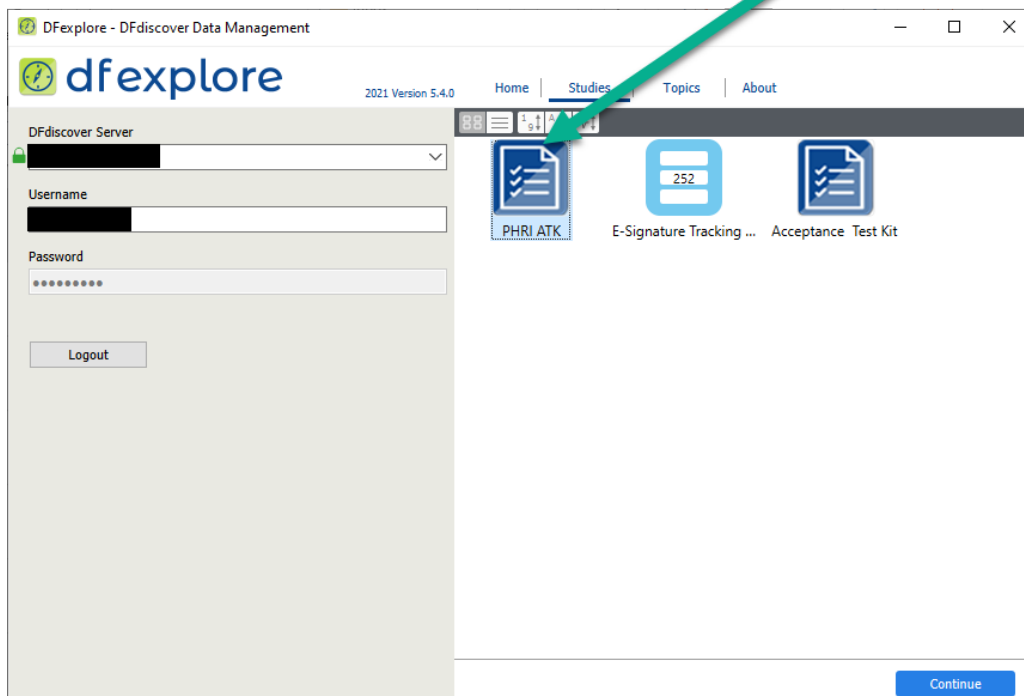
- 4.1. Launch the DFExplore client (small login window opens)
- 4.2. Connect and login to the PHRI Server.
 - 4.2.1. In **DFdiscover Server** field, enter “edc.phri.ca”
 - 4.2.2. In **Username** field, enter your personal DFExplore account username
 - 4.2.3. In **Password** field, enter the password for your DFExplore account

4.3. Select the Login button



5. Open Study

- 5.1. (If the DfExplore client connects successfully to the server, DfExplore 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.

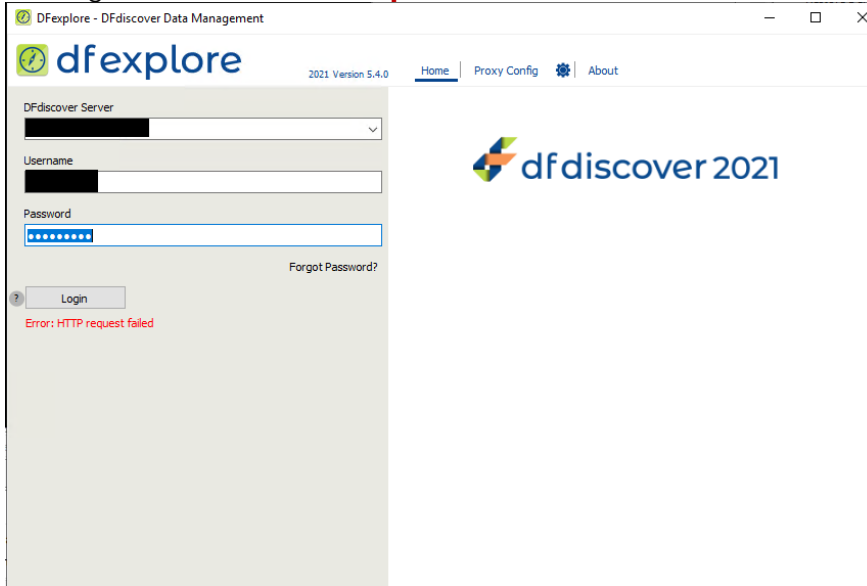


Common Issues & How to Resolve Them

6. DFExplore Server Connection - Issues & Next Steps

If the connection or login to the DFExplore 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**”

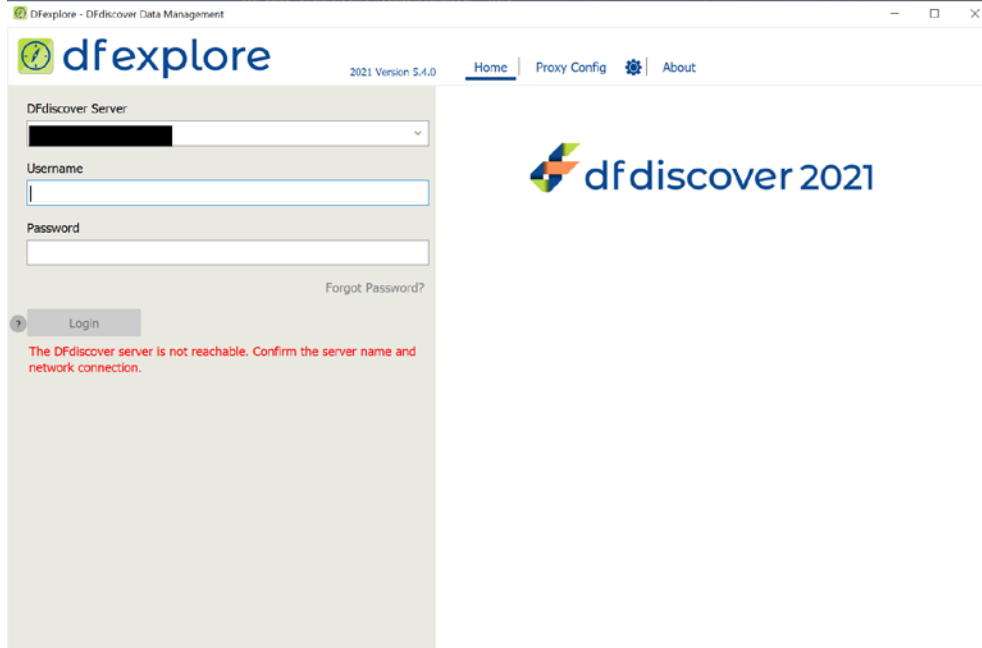


6.1.1. Please contact your Information Technology (IT) support and ask them to:

- ◆ Ensure that port 443 is open – if this is blocked purposefully by IT policy, then please contact PHRI about providing alternate method of accessing DFExplore
- ◆ Help you configure Proxy Server settings if necessary (see “**How to Configure Proxy Server Settings**” section below)

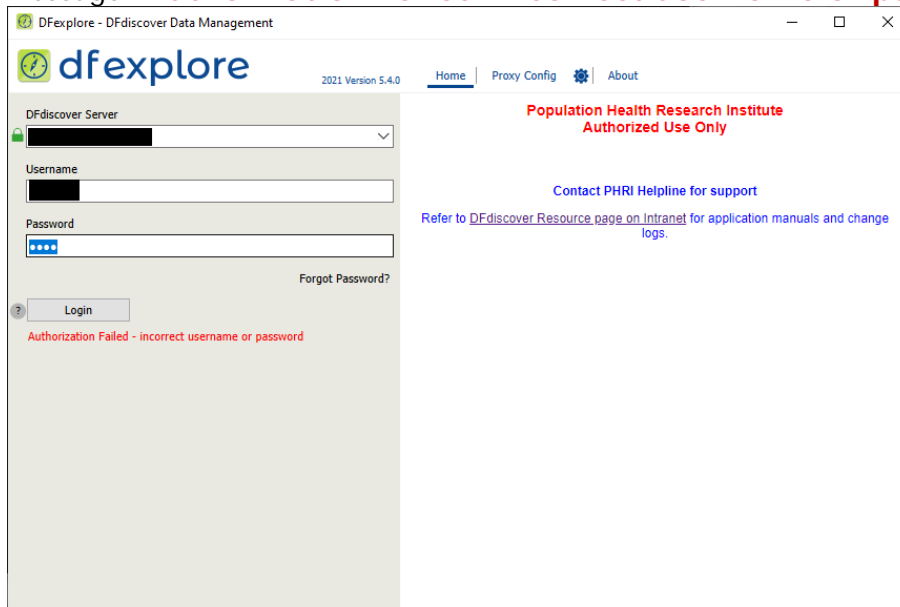
Additional Information about the PHRI server that you IT team may require:
 “edc.phri.ca” host name has an external IP address of 205.207.98.22

6.2. Message **“The DFdiscover server is not reachable! – Confirm the server name and network connection!”**



- 6.2.1. Contact your IT support to confirm edc.phri.ca is accessible through your network. Additional Information about the PHRI server that your 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 **How to Report Ongoing Issues and Obtain Additional Support** section below.

6.3. Message **“Authorization Failed- incorrect username or password”**



- 6.3.1. This indicates the login name and/or password is incorrect, use the password reset feature within DFExplore to reset password as shown below or contact the Study Helpline to reset your password.
- 6.3.2. Use the DFExplore “Forgot Password?” feature:

- Enter DFdiscover Server and Username -> Click Forgot Password? Link

The screenshot shows the DFExplore login interface. On the left, there are input fields for 'DFdiscover Server' (set to 'discover-test.phri.ca'), 'Username' (set to 'i_test'), and 'Password'. A 'Login' button is below these fields. To the right, there is a 'Forgot Password?' link highlighted with a green arrow. The top right of the page displays 'Population Health Research Institute Authorized Use Only' and 'Contact PHRI Helpline for support'. A link to 'DFdiscover Resource page on Intranet' is also visible.

- Enter the E-mail Address registered to your DFExplore account > click Submit

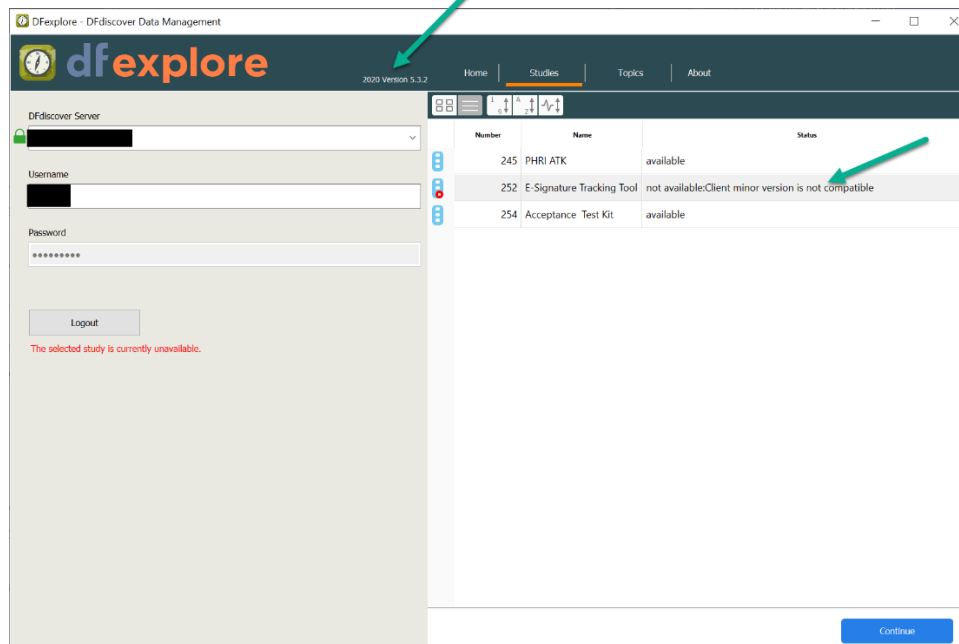
The screenshot shows the DFExplore password reset interface. On the left, there are input fields for 'DFdiscover Server', 'Username', and 'Password', with a 'Forgot Password?' link below them. On the right, there is a 'Reset Password' section with instructions: 'To reset your password, enter your previously registered Email address and click Submit. A Password Reset Email will be sent to your email address with instructions for completing the password reset.' Below this is an 'Email' input field and 'Submit' and 'Cancel' buttons. The 'Submit' button is highlighted with a green arrow.

- 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 DFExplore window does not change to display the Study, and an error or information message appears 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 **“The selected study is currently unavailable.”** with the status **“not available: Client version is not compatible”**



7.1.1. You are likely using an older version of the DFExplore client. First make sure that you are using DFExplore 5.4. If you still get the same error, contact the PHRI Project Office to confirm the client version configured for your Study.

8. Working in a DFExplore - Issues & Next Steps

8.1. If your computer Anti-Virus software reports malicious behavior when trying to upload/import a file to DFExplore, and closes DFExplore

8.1.1. Contact your IT support to ask them to make an Anti-Virus software exception for DFExplore and DFgs software. Additional information your IT Team may require:

- ◆ *Software filename is DFExplore.exe*
- ◆ *Software filename is DFgs.exe*

How to Report Ongoing Issues and Obtain Additional Support

If your **connection to the DFExplore server is failing or the DFExplore 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 DFExplore 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.

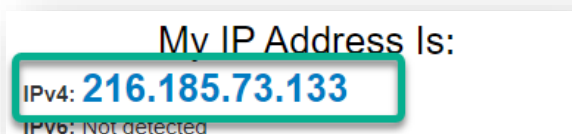
(NOTE: If you need assistance with these steps on your computer, please contact your local IT support team.)

9. 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)

9.1. 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)**



9.2. Determine your computer local IP address

Using a Microsoft Windows computer:

- 9.2.1. 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.
- 9.2.2. (Command Prompt window opens) Type **ipconfig** (no spaces), then **<Enter>**

```

C:\>ipconfig

Windows IP Configuration

Ethernet adapter Ethernet:

    Connection-specific DNS Suffix . . . : 
    IPv4 Address. . . . . : 192.168.168.79
    Subnet Mask . . . . . : 
    Default Gateway . . . . . : 
  
```

- 9.2.3. 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.

10. 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:

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

10.1.1. If the information that displays looks like the following, then you cannot 'find' (resolve) edc.phri.ca from your computer 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-existent domain
```

Next steps: Please **contact your local IT support to determine why your "computer is unable to locate the PHRI DFExplore 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 information into your email draft, select anywhere within the Command Prompt window and typing **CTRL + 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 **CTRL + V** keyboard keys at the same time.)

10.1.2. If the information that displays looks like the followings, then you can successfully 'find' (resolve) edc.phri.ca 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
```

11. 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:

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

11.2. (The displayed information describes the communication path between your computer and the PHRI DFExplore 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.
```

- 11.3. 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 CTRL + 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 CTRL + V keyboard keys at the same time.)

12. 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:

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

- 12.1.1. 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
```

- 12.1.2. 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.



- 12.1.3. 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 DFExplore 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.**



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

13. How to contact PHRI Support

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

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

13.1.2. **Subject:** DFExplore Troubleshooting

13.1.3. **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 #, DFExplore user account name; and

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

All the data you collected in the draft email by completing troubleshooting steps 9-12 in this User Guide

13.2. 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.**

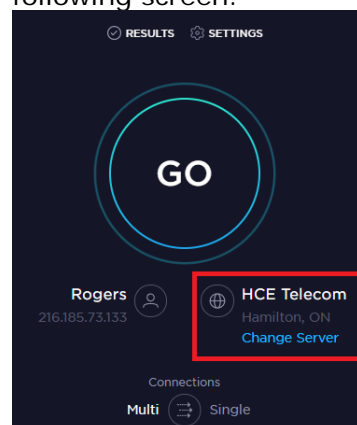
14. Check Network Performance

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

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

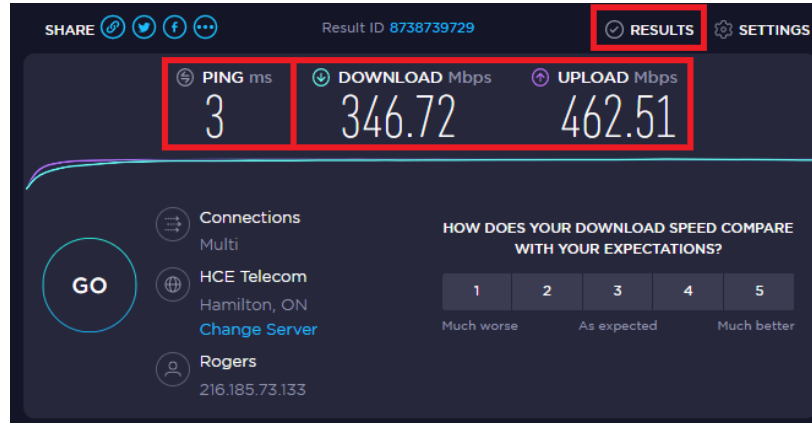
14.2. Please go to one of following free and accessible web sites: www.speedtest.net or www.pingtest.net

14.2.1. 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)

- 14.2.2. 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 DFExplore)
- 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 DFExplore)
- 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 DFExplore to operate reliably)

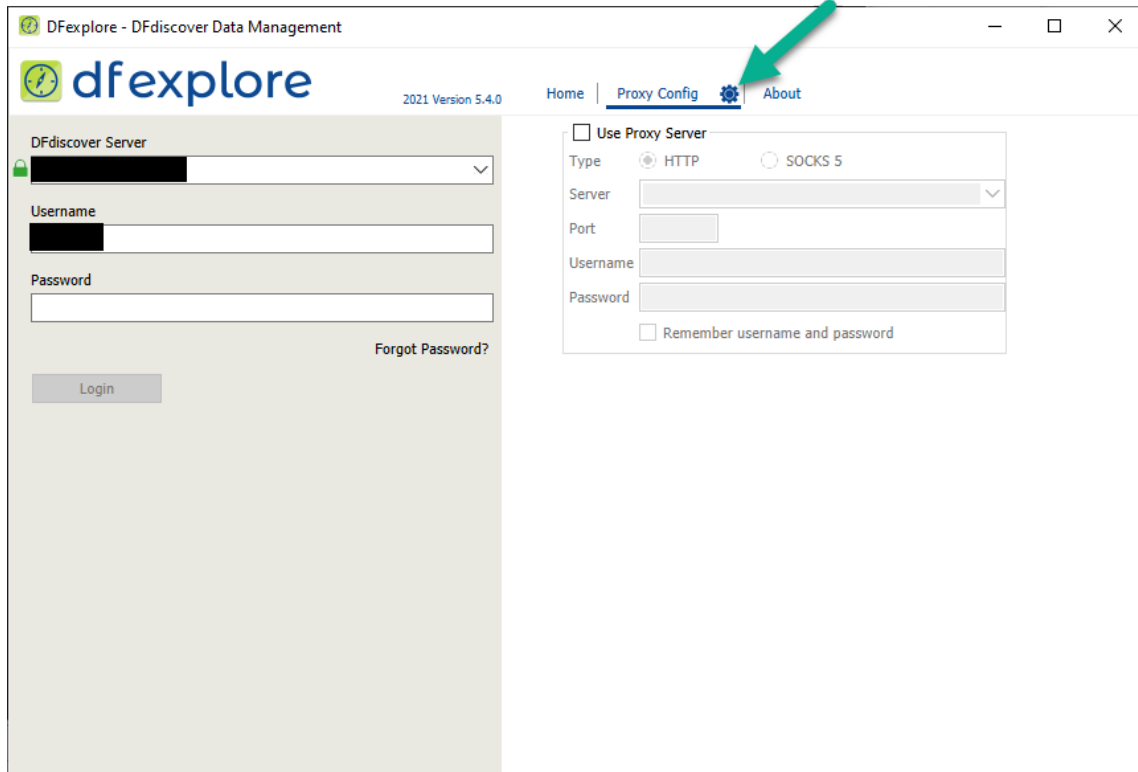
- 14.2.3. Please send the recorded results to your local IT support and work with them to resolve any issues related to either lost ping packets or Internet performance issues.

How to Configure Proxy Server Settings

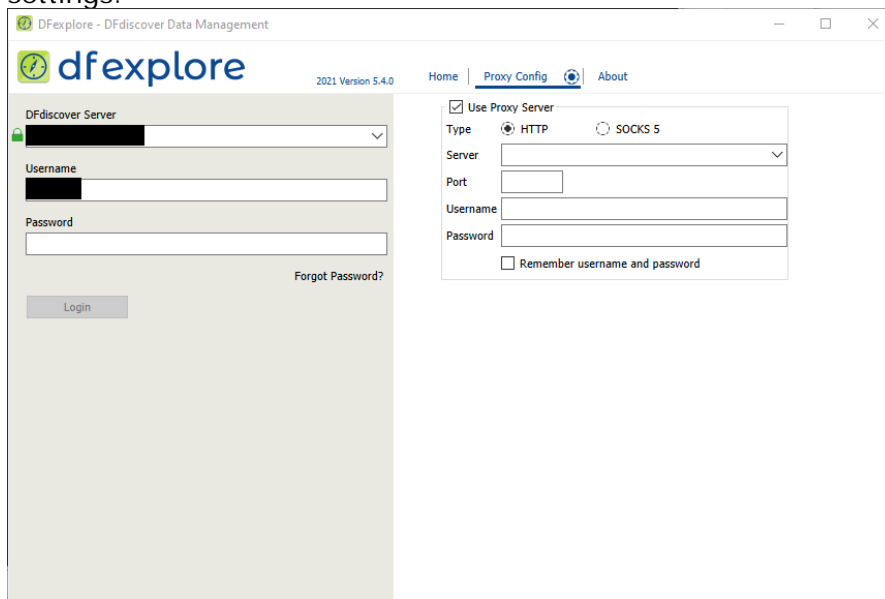
If you have determined that your IT department has installed a proxy server (to filter requests sent to other servers on the internet), follow these instructions to register the proxy server in DFExplore.

15. Enter Proxy Settings

15.1. Start the DFExplore client and the following window appears



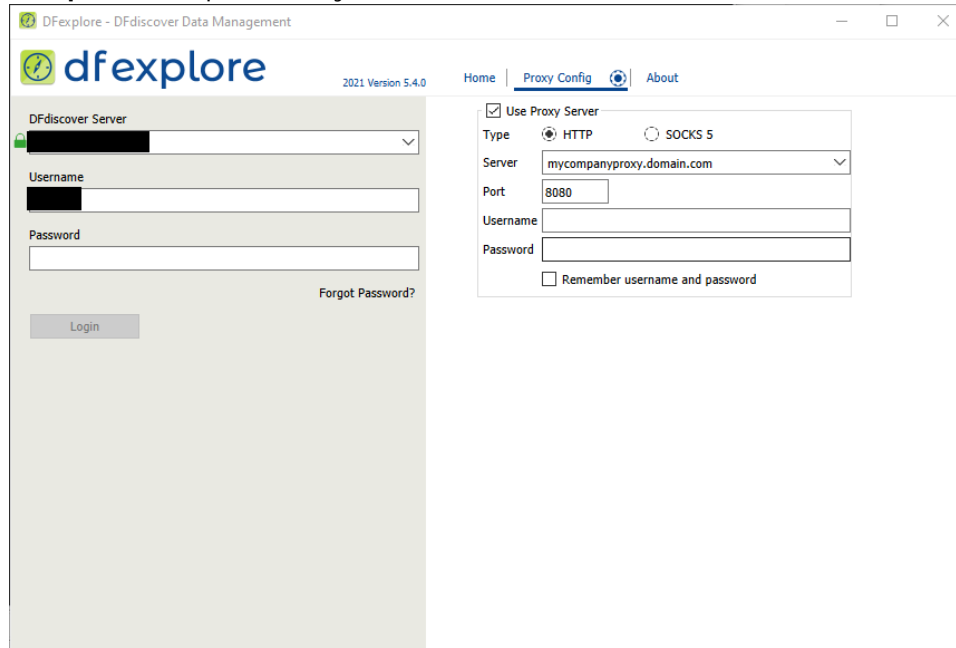
15.2. In this window, check off the "Use Proxy Server" check box to enable the proxy server settings.



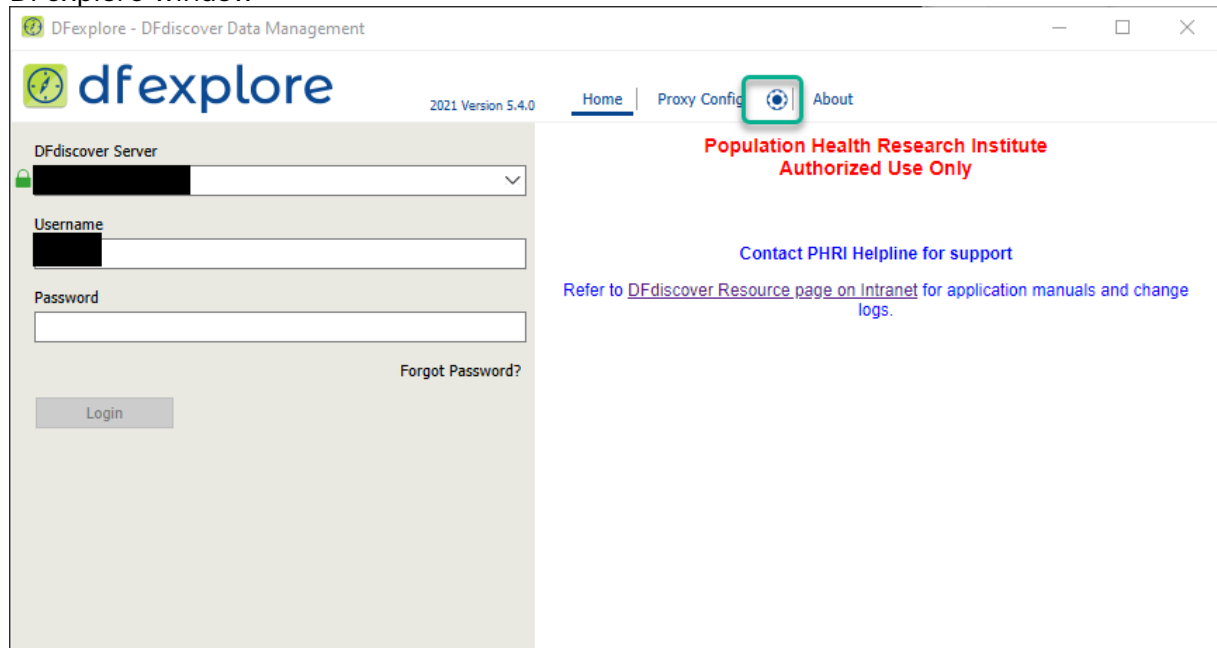
15.3. The settings that you choose for the proxy server are dependent upon your specific environment. Contact your IT support staff to get the proper settings for the following window. (The "mycompanyproxy.domain.com" in the screenshot is just an example.)



Note: If you were previously using Proxycap, then you can use the same settings configured for Proxycap for the DFExplore proxy settings. You should not configure Proxycap to help proxy DFExplore 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 DFExplore login name and password** provided by PHRI.




15.4. After adding your proxy server information, click on OK and then you will see the following DFExplore window



Notice that the  button has changed to appear as . This indicates that a proxy server has been configured to be used in the DFExplore client program.

16. Edit or remove your Proxy Server Settings

- 16.1. To modify or remove the Proxy settings, simply select the  (wheel with bounding circle button) > ('Configure Proxy Server' window opens) > enter the correct information > select OK button to save the new settings, then try to login to DFExplore again.

