

DFexplore Transition Training



Welcome to DFExplore

We are excited to introduce to you today DFExplore 5.4.0

- ❑ It is re-named line of Electronic Data Capture (EDC) products created by DF/net Research.
- ❑ You are to continue using one tool from this line: DFExplore which previously was referred to as iDataFax.



Introduction to DFExplore

How is it going to affect me?



- ❑ **One Time Action**: You will need to download and install DFExplore tool/app version 5.4.0 on each computer/laptop where you previously used iDataFax.
- ❑ **Ongoing/Moving Forward**: DFExplore tool's user interface is almost identical to iDataFax. The slight differences/updates are covered in the following slides.

Introduction to DFExplore

How can I prepare?

- Download DFExplore 5.4.0 by clicking the link below:
[DFExplore 5.4.0 client download](#)

You will be prompted to enter the following information:

- Operating system (Windows or MAC)
- User ID (Existing iDataFax / DFExplore userID provided by PHRI)
- Study (Enter one of the PHRI study names you are participating – e.g. ACHIEVE, COMPASS, etc)
- Center ID (your 3-digit site number)

Click submit and follow the instructions

Introduction to DFexplore (computer requirements)



What are the computer requirements?

- Operating System (Windows 10 and newer macOS 10.14 (Mojave) and newer)

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.

- TCP/IP Networking/Internet Connection
- Any Client with older OS might need to use Roam AnyWare portal. Contact **PHRI study team** for details

Introduction to DFexplore (FAQ)

Can I still use iDataFax 2014 client?

- To access any of PHRI studies you should continue using iDataFax until transition date TBD

When can I install DFexplore 5.4.0 client?

- You can install DFexplore anytime now

When can I start using DFexplore 5.4.0 client?

- You will be able to access any of PHRI studies after upgrade, refer to update on iDataFax landing page and update from coordinating study team for transition date



DFexplore Transition Information

Note: iDataFax/DFexplore will NOT be available during system upgrade

Please save your work and log out of iDataFax prior to the scheduled downtime.

IMPORTANT

If you need to report a SAE/SUSAR, please contact your PHRI study team for further instructions.



Population Health
Research Institute
HEALTH THROUGH KNOWLEDGE



Introduction to DFExplore (FAQ cont.)

If I am unable to install DFExplore 5.4.0 client, what should I do?

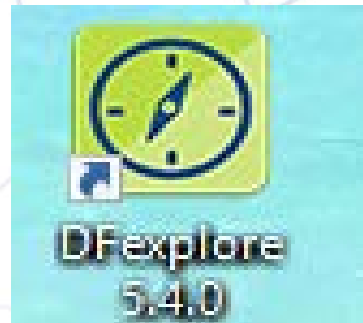
- ❑ Please visit the [PHRI website](#) for troubleshooting tips
- ❑ Contact your organization's IT department
- ❑ Contact your PHRI study team
 - ❑ Contact your NLO/SMC for toll free number
- ❑ Contact PHRI IT department via
 - ❑ [Email: PHRI.ICThelpdesk@phri.ca](mailto:PHRI.ICThelpdesk@phri.ca)
 - ❑ Help Line US/Canada: 1-866-414-7474
 - ❑ Help Line Direct: 1-905-522-3288 X 40444



Also using iDataFax for Another Non-PHRI Study?

If a site uses a different version of iDataFax for another Study outside of PHRI run trials, they can continue to have multiple versions of iDataFax / DFExplore on the same computer

However – ALL PHRI trials will be using the DFExplore version 5.4.0 after transition date.



Data Collection Using DFExplore

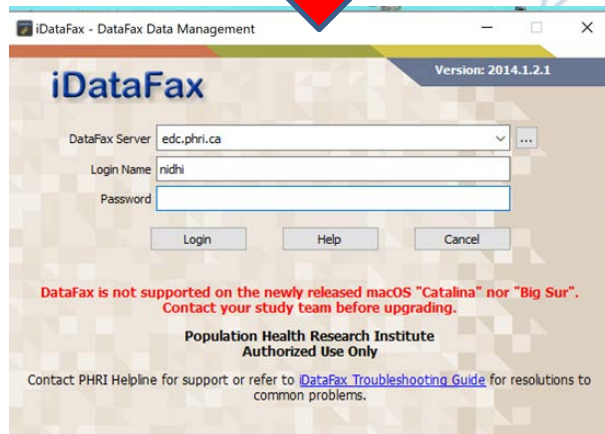
Electronic Data Capture (EDC)

Sites will still enter data using DFExplore user-interface where:

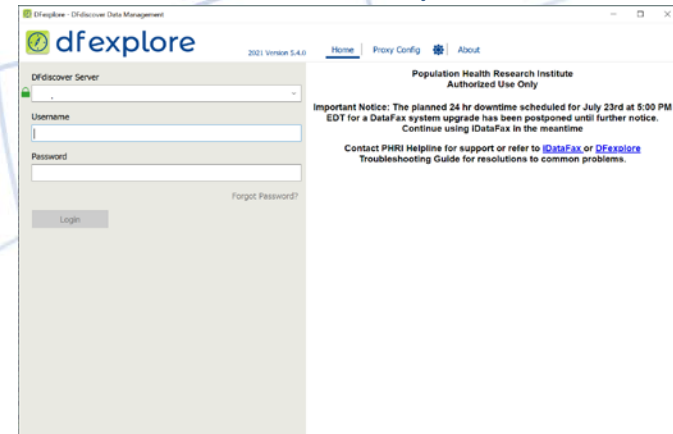
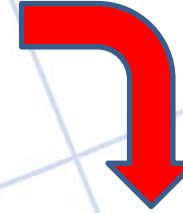
- ❑ **SAME** - Data is organized as a set of patient binders with screens that match paper CRFs
- ❑ **SAME** - Enables users to enter reasons for data values and missing fields, and reply to data queries
- ❑ **SAME** - Includes other features: lookup tables, range and edit checks, help messages, etc.

Connecting to the Application

OLD iDataFax Thumbnail



NEW DFExplore Thumbnail



OLD iDataFax Login Screen

NEW DFExplore Login Screen

NOTE – the server name is still edc.phri.ca

Accessing DFexplore

- ❑ **DFdiscover server name:** edc.phri.ca
- ❑ **Username:** same as you used for iDataFax
- ❑ **Password:** current one that you used for iDataFax.

DFexplore - DFdiscover Data Management

dfexplore 2021 Version 5.4.0 Home Proxy Config About

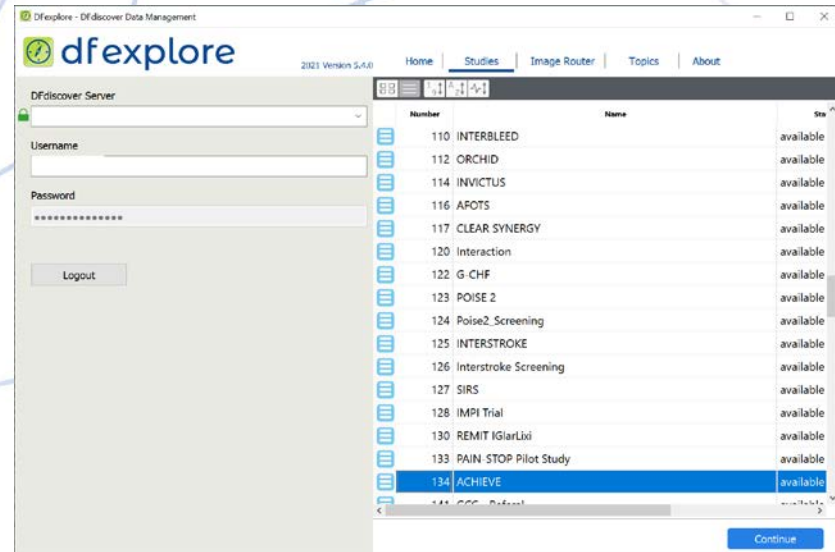
DFdiscover Server
edc.phri.ca

Username
SAME as you have been using for iDataFax

Password
SAME as you have currently been using for iDataFax
Forgot Password?

Login

The Launch Screen



OLD iDataFax Launch Screen

Available Studies

- ❑ Vertical arrangement of available studies

NEW DFExplore Launch Screen

Available Studies

- ❑ Tabular arrangement of available studies

The Launch Screen (continued...)

Tabular (Icon) View

version 5.4.0 Home Studies Image Router Topics About

View as Icons

22	70	82	128
ORIGIN	TIPS3-TMF	PHRI - Trial Master File	IMPI Trial
134	155	168	170
ACHIEVE	COMPASS	TIPS3	COMPASS_TMF
212	225	246	
dev_HOPE3 - linked ...	hope3	PHRI DataFax Training	

List View

.4.0 Home Studies Image Router Topics

View as List

	Name
22	ORIGIN
70	TIPS3-TMF
82	PHRI - Trial Master File
128	IMPI Trial
134	ACHIEVE
155	COMPASS
168	TIPS3
170	COMPASS_TMF
212	dev_HOPE3 - linked development study
225	hope3
246	PHRI DataFax Training

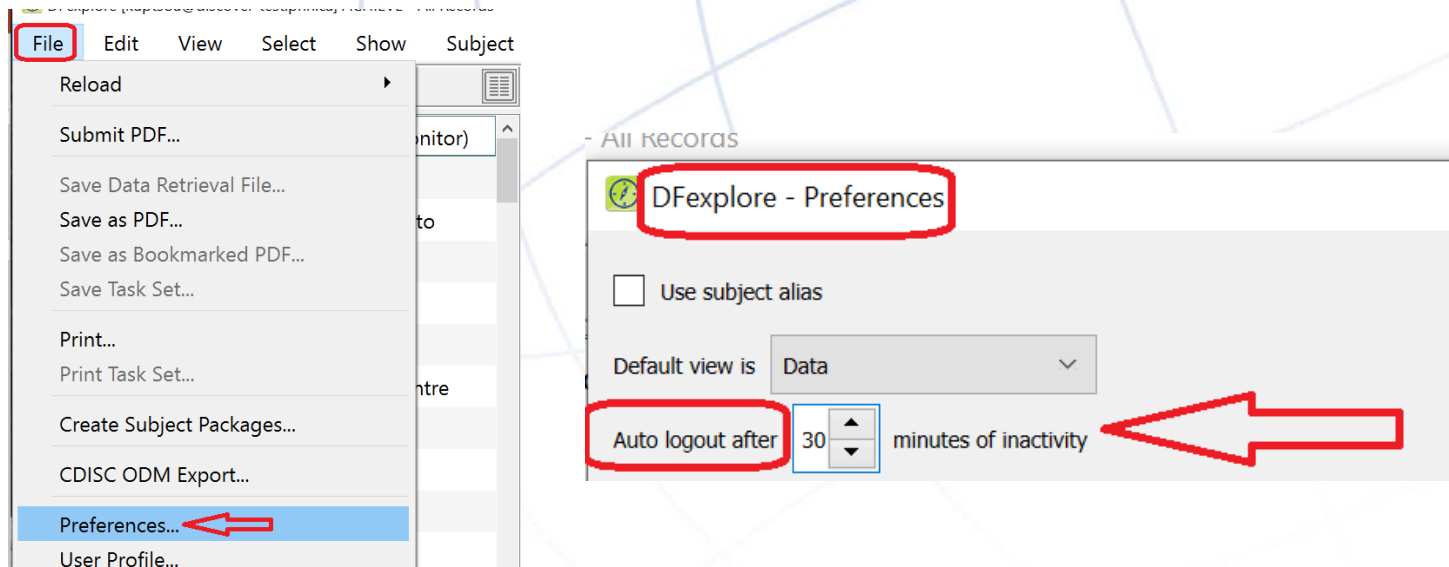
Preferences

For each study you can set the preferable auto logout from 5 minutes (by default) up to 30 minutes.

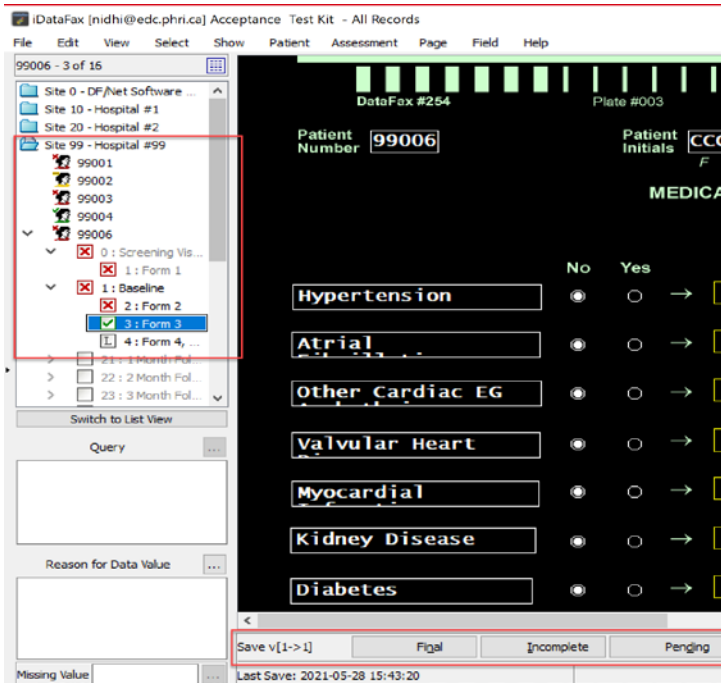
To change auto logout: select from top bar menu:

File → **Preferences**

By using arrows, you can select the number of minutes when you will be log out of DFExplore automatically if you do not use the application.

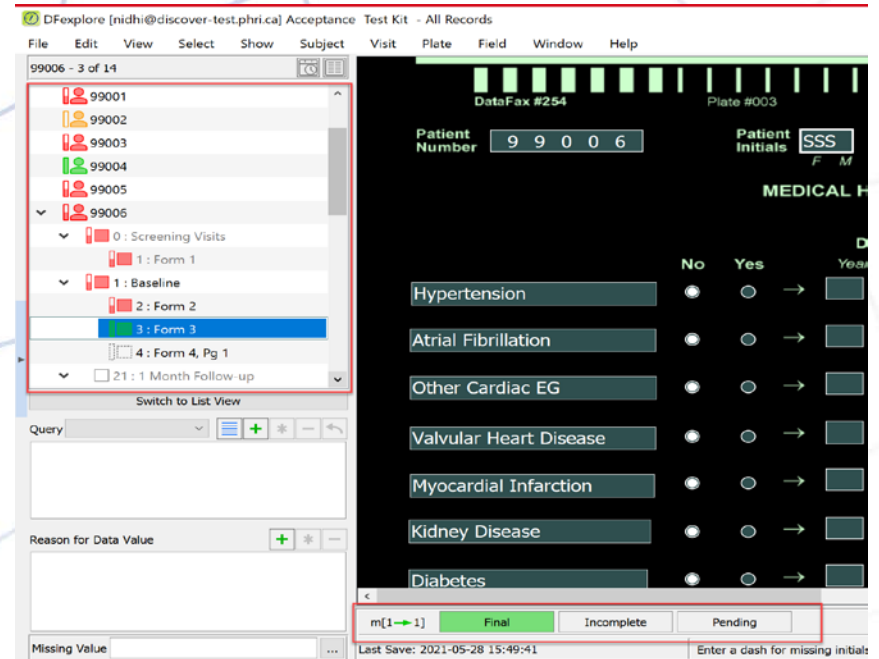


Subject Binders and Save Button



OLD iDataFax Main Screen

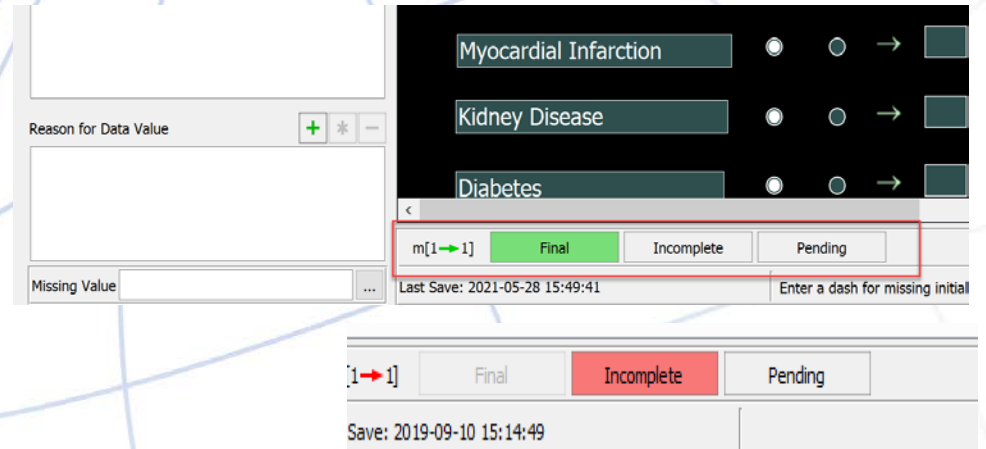
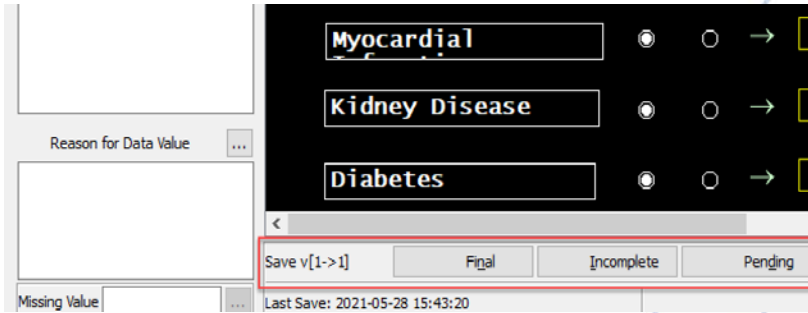
- ❑ Participant "Faces"
- ❑ Black background for text fields



NEW DFExplore Main Screen

- ❑ Subject "Silhouettes"
- ❑ Grey background for text fields

Subject Binders and Save Button



OLD iDataFax Main Screen

- Final Save button – Grey
- Save as Incomplete button – Grey

NEW DFExplore Main Screen

- Final Save button – Green
- Save as Incomplete button – Red

What do the Colours and Icons Represent?

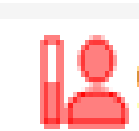
Different icons and colors indicate the status of participants, assessments and pages



Empty Head – New participant not yet started



Green Head – No problems, all pages entered so far are complete. ***NEW*** Thermometer – Fully complete



Red Head – One or more pages are incomplete or queried. ***NEW*** Thermometer – Half full



Yellow Head – One or more pages are pending, and no pages are incomplete. ***NEW*** - Thermometer - Empty



'L' Head – All pages within assessment have been marked lost (i.e., unavailable)

Password Resets – Forgotten

DFExplore - DFdiscover Data Management

dfexplore 2021 Version 5.4.0 Home Proxy Config About

DFdiscover Server
[Dropdown menu]
Username
[Text field]
Password
[Text field]
Forgot Password?
Login

Click on "Forgot Password" to reset

Population Health Research Institute
Authorized Use Only

DFdiscover Test Server

Contact PHRI Helpline for support

Important Notice: On July 23rd PHRI will be upgrading its Electronic Data Capture system DataFax 2014.1.2 to the latest version now renamed DFDiscover 2021 5.4.0. As part of this upgrade the iDataFax client software that you have locally installed will also need to be upgraded, it is renamed as DFExplore and will need to be installed in order to access the upgraded PHRI DFDiscover server, download client using [DFExplore download page](#)

Contact PHRI Helpline for support or refer to [iDataFax](#) or [DFExplore](#) Troubleshooting Guide for resolutions to common problems.

DFExplore - DFdiscover Data Management

dfexplore 2021 Version 5.4.0 Home Proxy Config About

DFdiscover Server
[Dropdown menu]
Username
[Text field]
Password
[Text field]
Forgot Password?
Login

Reset Password

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.

Email
[Text field]
Submit Cancel

Password Resets – Compromised Password

DFexplore [nidhi@discover-test.phri.ca]

File Edit View Select Show

- Reload
- Submit PDF...
- Save Data Retrieval File...
- Save as PDF...
- Save as Bookmarked PDF...
- Save Task Set...
- Print...
- Print Task Set...
- Create Subject Packages...
- CDISC ODM Export...
- Preferences...
- User Profile...
- Clear Cache
- New Study... Ctrl+N
- Close Study
- Exit

DFexplore - User Profile

Username: nidhi
Full Name: Nidhi Jethoo
Email: nidhi.jethoo@phri.ca

Affiliation: PHRI
Address:
City: Postal Code:
State:
Country: Canada
Telephone:
Fax:

DFexplore - Change Password

Please indicate new password:

New Password:
Confirm Password:

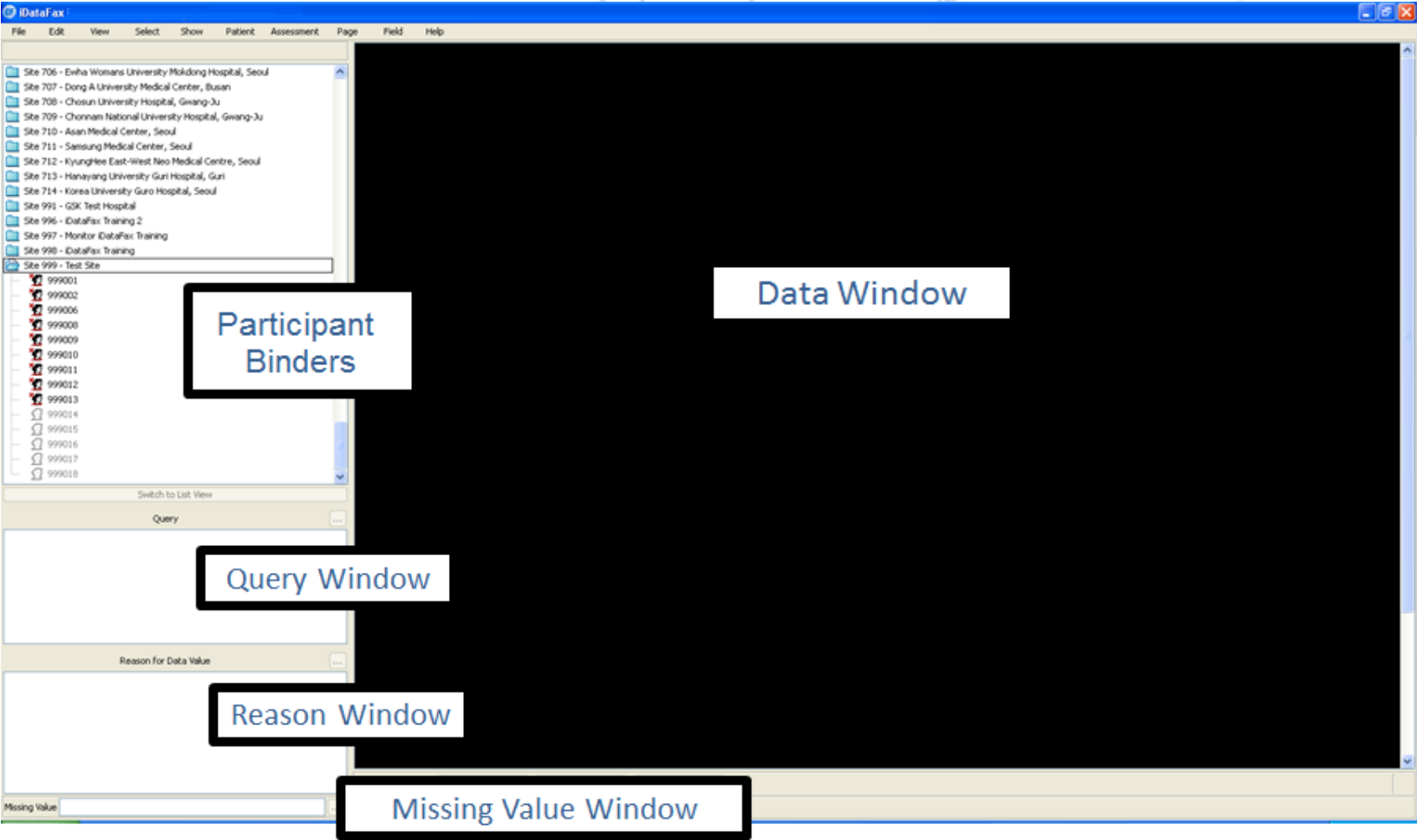
Click on File → User Profile → Change Password

Updated Terminology

OLD iDataFax	NEW DFExplore
DataFax	DFdiscover
iDataFax	DFExplore
Fax	Image
Centre	Site
Lost record	Missed Record
Problem	Category
Sign-off	Save
QC	Query
Login name	Username
Patient / Participant	Subject



iDataFax Data View – Old Screen



DFexplore Data View – New Screen

The screenshot shows the DFexplore Data View interface. The window title is "DFexplore [nidhi@discover-test.phri.ca] PHRI ATK - All Records". The menu bar includes File, Edit, View, Select, Show, Subject, Visit, Plate, Field, Window, and Help. The left sidebar shows a tree view of sites and visits for patient 99001. The main area displays a form for a blood pressure reading. Callouts point to various features:

- Open Site:** Points to the site selection dropdown in the top left.
- Open Participant Binder:** Points to the patient ID "99001" in the sidebar.
- Reply to Query:** Points to the "No" radio button for the question "Did the patient return the study medication dispensed at the previous visit?".
- Add Reason for Data:** Points to the "Reason for Data Value" text area.
- Specify Missing value:** Points to the "Missing Value" input field at the bottom.

Visible data in the form includes:

- Patient ID: 99001
- Date: 06/06/97
- Reading 1 (mmHg): 170 / 096 (systolic / diastolic)
- Reading 2 (mmHg): 170 / 096 (systolic / diastolic)
- Weight: 055.1 kg or 121.5 lbs
- Medication Code #: 1143

New Date Picker Using Calendar Widget

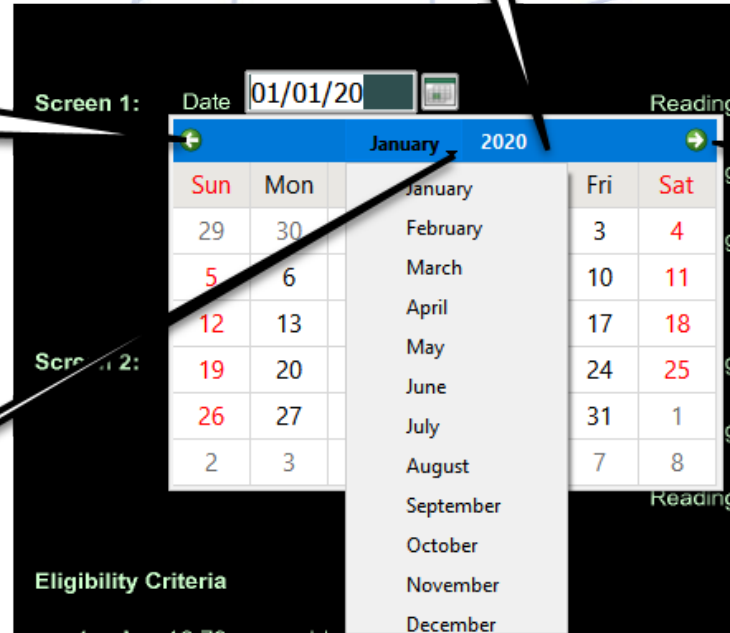
New Date Picker using Calendar – Default setting

Select up and down arrow to change the Year

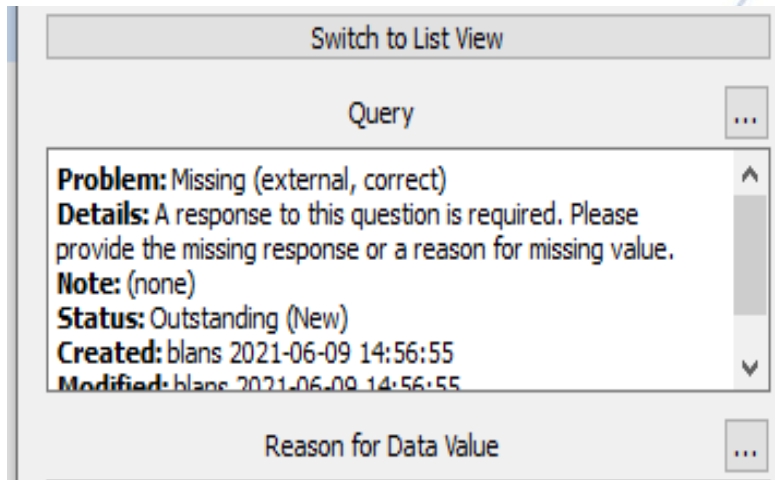
Pick Previous Month

Pick Next Month


Click arrow to select Month using list

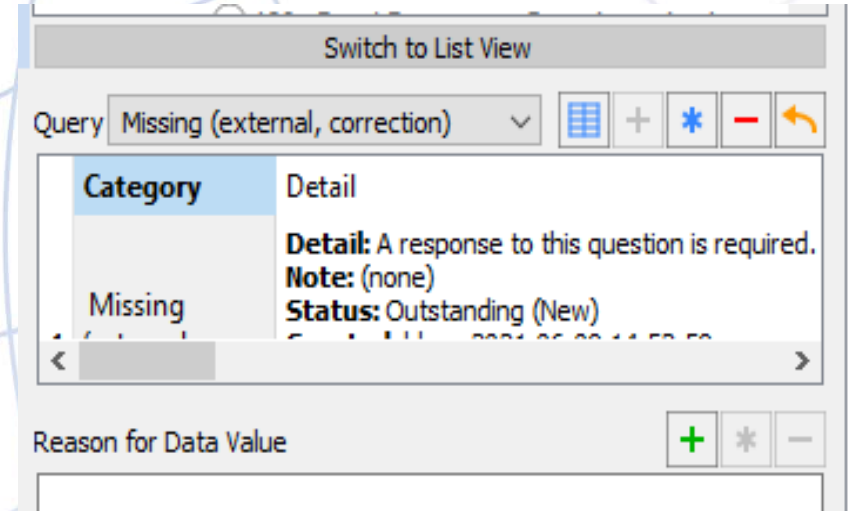


Query Window




OLD iDataFax Query Window

- Query type called Problem
- Respond to Query using 



NEW DFExplore Query Window

- Query type called Category
- Respond to Query using 

Assessment Icons

Assessment and page icons use the same colors, with the same meaning, but they come in different shapes to indicate whether they are required or optional:

OLD iDataFax icon



NEW DFExplore icon



Square – a required assessment or page

Circle – an optional assessment or page

Diamond – an unexpected assessment or page

Electronic Data Entry

DFexplore will still allow you to:

- Tab across the e-CRF to show you where you need to enter data
- Click on fields where you would like to enter data
- Complete Auto-calculations (where applicable)
- Utilize signature look up tables (where applicable)
- Execute digital signatures, compliant with 21 CFR Part 11
- View and reply to Queries
- Receive QC reports
- Provide Reasons for Data Value

Electronic Signatures



The e-signature feature continues to be **21 CFR Part 11 compliant**

The e-signature is a combination of the DFExplore user name and password, and is to be provided at the end of the eCRF page or visit assessment.

An electronic signature (e-signature) is the legally binding equivalent to a hand written signature which indicates the user confirms the data reported within the eCRF.

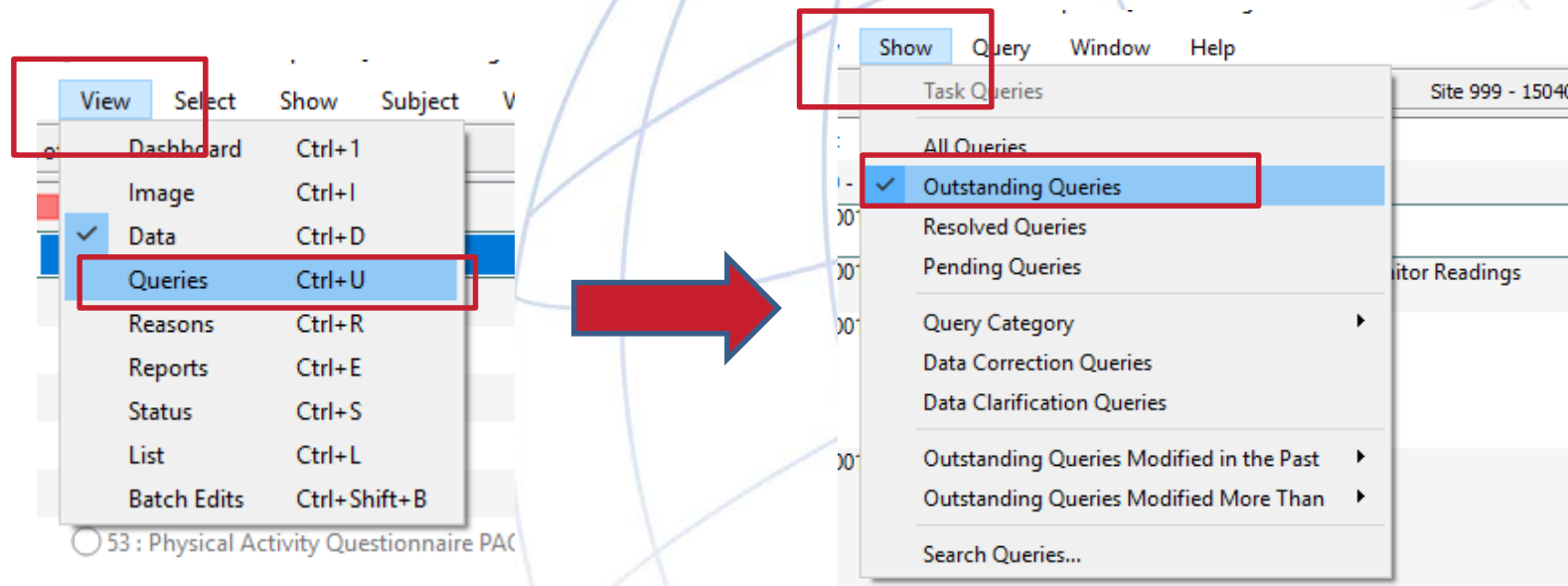
Name of Authorized Person Completing CRF:

Electronic Signature: / / Time :

(Legally binding equivalent to a handwritten signature)
year month day 24 hr clock

ARTESiA Baseline CRFs. Final Version 1.0 2014-12-03

Viewing Queries



To View Queries, Click:

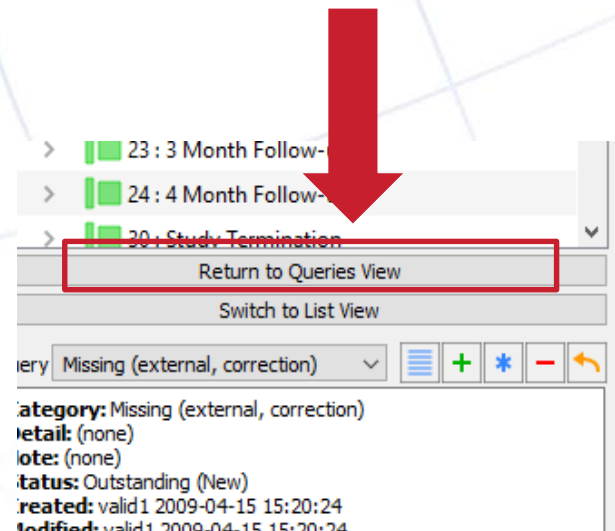
VIEW → QUERIES → SHOW → OUTSTANDING QUERIES

Query View

Site 99 - 14 queries (1 resolved and 13 outstanding) modified betw

Site / Subject	Visit : Page	Field : Category	Status & Replies
Site 0 - DFnet (Error...			
Site 10 - Hospital #1			
Site 20 - Hospital #2			
Site 99 - Hospital #99			
99001	Baseline : Form 2	Smoking Status := blank (Missing)	Outstanding (New) Modified by: valid1 2009-04-15 1
99001	Baseline : Form 3	Patient Initials : (Missing)	Outstanding (New) Modified by: nidhi 2021-06-08 11
99001	Study Termination : Form 6	Missing Page	Outstanding (New) Modified by: nidhi 2021-06-14 10
99003	Baseline : Form 3	Missing Page	Outstanding (New) Modified by: nidhi 2021-06-14 10
99003	Baseline : Form 4, Pg 1	Missing Page	Outstanding (New) Modified by: nidhi 2021-06-14 10
99003	1 Month Follow-up	Overdue Visit	Outstanding (New) Modified by: nidhi 2021-06-14 10
99003	2 Month Follow-up	Overdue Visit	Outstanding (New) Modified by: nidhi 2021-06-14 10
99003	3 Month Follow-up	Overdue Visit	Outstanding (New) Modified by: nidhi 2021-06-14 10
99003	Study Termination : Form 6	Missing Page	Outstanding (New) Modified by: nidhi 2021-06-14 10
99004	Baseline : Form 2	Pulse beats/minute : (Missing)	Outstanding (New) Modified by: valid1 2009-04-15 1
99004	Baseline : Form 4, Pg 1	Missing Page	Outstanding (New) Modified by: nidhi 2021-06-14 10
99005	Study Termination : Form 7	Final Visit Date : (Missing) Detail: test	Resolved corrected Resolved by: nidhi 2021-06-04 17
99008	Screening Visits	Overdue Visit	Outstanding (New) Modified by: nidhi 2021-06-14 10
99008	Study Termination : Form 6	Missing Page	Outstanding (New) Modified by: nidhi 2021-06-14 10

- ❑ Double-click on the query to go to the exact field with the QC you want to fix
- ❑ Click on "Return to Query View" to return to listing of outstanding Queries



> 23 : 3 Month Follow-up

> 24 : 4 Month Follow-up

> 20 : Study Termination

Return to Queries View

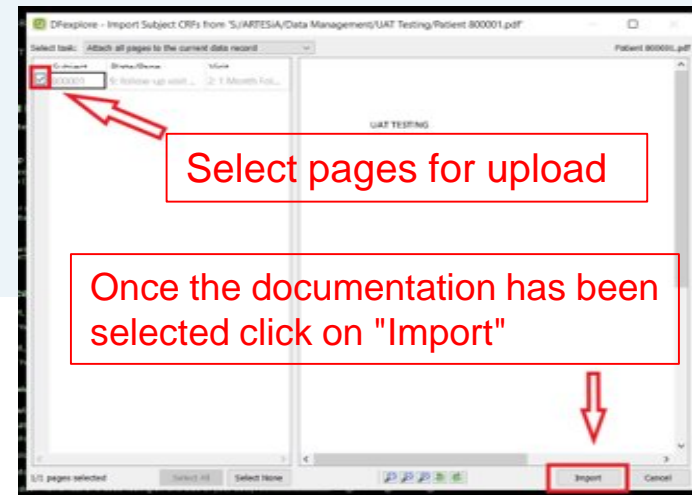
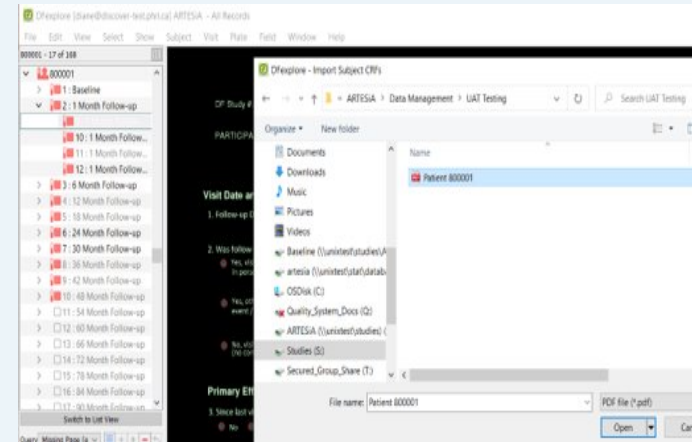
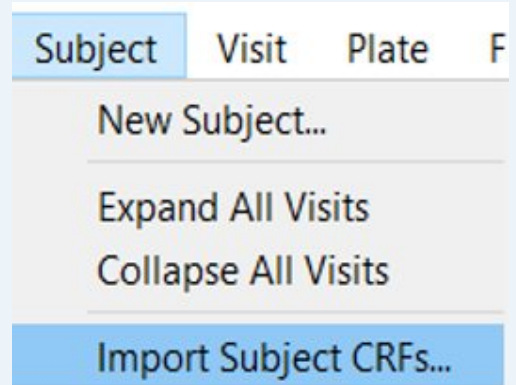
Switch to List View

Query Missing (external, correction) [List Icon] [Add Icon] [Star Icon] [Remove Icon] [Refresh Icon]

Category: Missing (external, correction)
Detail: (none)
Note: (none)
Status: Outstanding (New)
Created: valid1 2009-04-15 15:20:24
Modified: valid1 2009-04-15 15:20:24

Submitting Source Documents

- ❑ Source documents for Patient Personnel Information
- ❑ Scan / Save the document to PDF (multiple pages can be saved in one file)
- ❑ Open the needed CRF (eg. Consent/ Shuttle Form/ Baseline etc.)
- ❑ From the "Menu" bar under the "Subject" tab > **Import Subject CRFs** and open the PDF file through a browser window



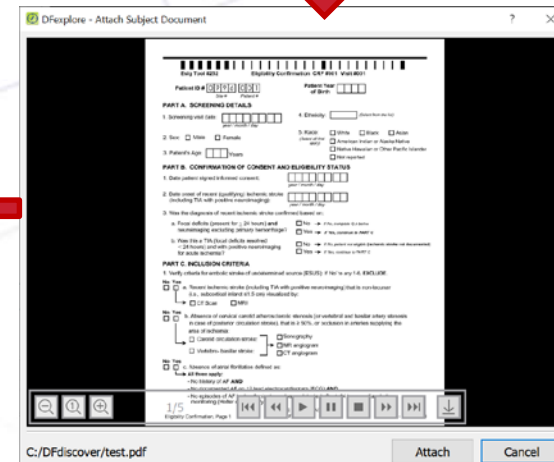
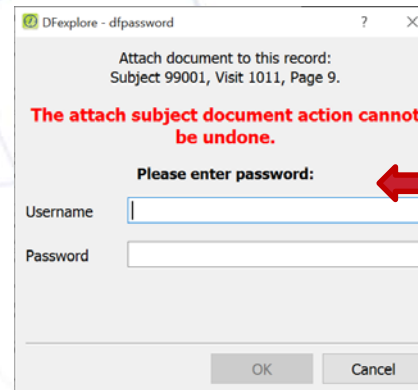
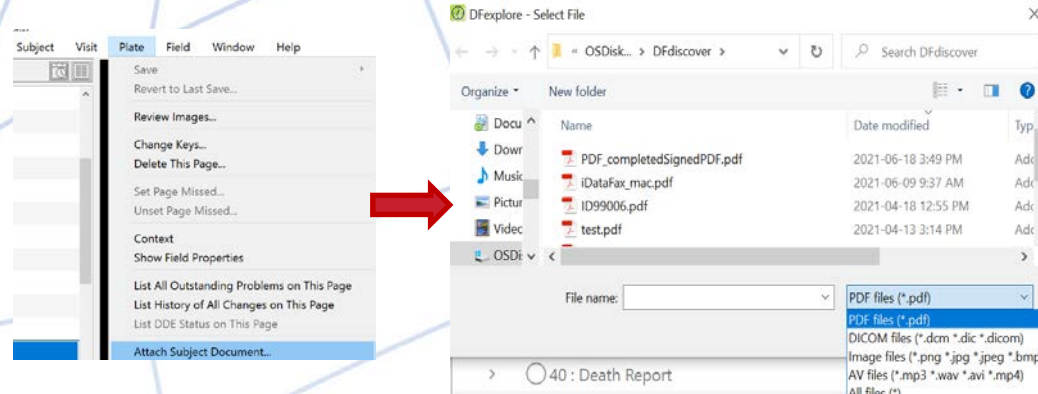
Uploading Other Source Documents

To **Attach** additional Source Images (such as ECGs, DICOM, etc)

Use **Plate** ➔ **Attach Patient Document** to attach the documents to the current record as a supporting document. Documents can be reviewed later with the review images dialog images dialog attached

Limitations:

- Attached files must be less than 25MB in size.
- Supported formats:
 - PDF
 - DICOM (dcm, dic, dicom),
 - image (png, jpg, jpeg, bmp)
 - AV(mp3, wav,mp4)

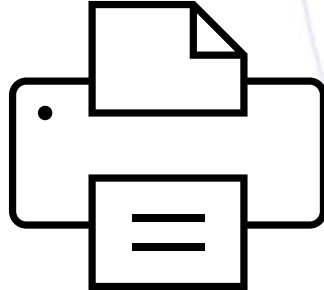


Submitting Source Documents - Fax

Sites can continue to Fax Subject Source Documents Via

- Fax Number:** 1-800-268-2370
- (Contact your NLO/SMC for local toll free fax number)
- Email:** datafax@phri.ca

Faxes are now called **Images**



DataFax #148		Plate #091		Inclusion Criteria Shuttle Report No. 7001	
Participant ID#	999	0001	Initials	AAA	Page 01 of 01
	Centre #	Participant #	F M L		

Thank you

**If you have any
further questions
please contact your
Project Office Study
Team**



**Population Health
Research Institute**
HEALTH THROUGH KNOWLEDGE



df discover 2021

www.phri.ca