

DFdiscover 2018 Version 5.1.0 Release and Installation Notes

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Version 5.1.0

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Abstract

The release notes for version 5.1.0 summarize the new features that have been added and those features that have been changed. It also details any unique requirements of the installation process.

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Preface

1. Getting Help

DF/Net Research, Inc.'s Technical Support Department can be contacted Monday to Friday between 9:00 am and 5:00 pm Eastern Time via any of the following methods:

55 Head Street, Suite 403
Dundas, Ontario L9H 3H8
Telephone: (905) 522-3282
Email: <support@datafax.com>
URL: www.dfnetresearch.com

2. DFdiscover Mailing List

DF/Net Research, Inc. provides an automated email mailing list for tips, help, and interaction with other DFdiscover users.

To subscribe to the mailing list, complete the simple form found at the [DFdiscover User's Group mailing list](#) webpage. It is also possible to unsubscribe from the mailing list by visiting the same webpage.

Procedure 1. To submit a message to the mailing list

1. Subscribe to the list. Message submissions are only accepted from members of the list.
2. Create your email message.
3. Send the email message to <DFUG@datafax.com>.

3. Conventions

A number of conventions have been used throughout this document.

Any freestanding sections of code are generally shown like this:

```
# this is example code  
code = code + overhead;
```

If a line starts with # or %, this character denotes the system prompt and is not typed by the user.

Text may also have several styles:

- Emphasized words are shown as follows: *emphasized words*.
- Filenames appear in the text like so: `dummy.c`.
- Code, constants, and literals in the text appear like so: `main`.
- Variable names appear in the text like so: `nBytes`.
- Text on user interface labels or menus is shown as: **Printer name**, while buttons in user interfaces are shown as **Cancel**.
- Menus and menu items are shown as: **File** > **Exit**.

4. Version Numbering

DFdiscover version numbers can have up to 3 components.

The first number identifies a major release containing all software components with both new features and bug fixes.

The second number identifies a minor release with bug fixes, backwards compatible features and contains all software components. If there is no minor release for a major release, this number is 0.

The third number identifies incremental patches (bug fixes only) to specified software components for the minor release identified by the first 2 digits of the version number. If there is no patch release for a major or minor release, this number is 0.

For example,

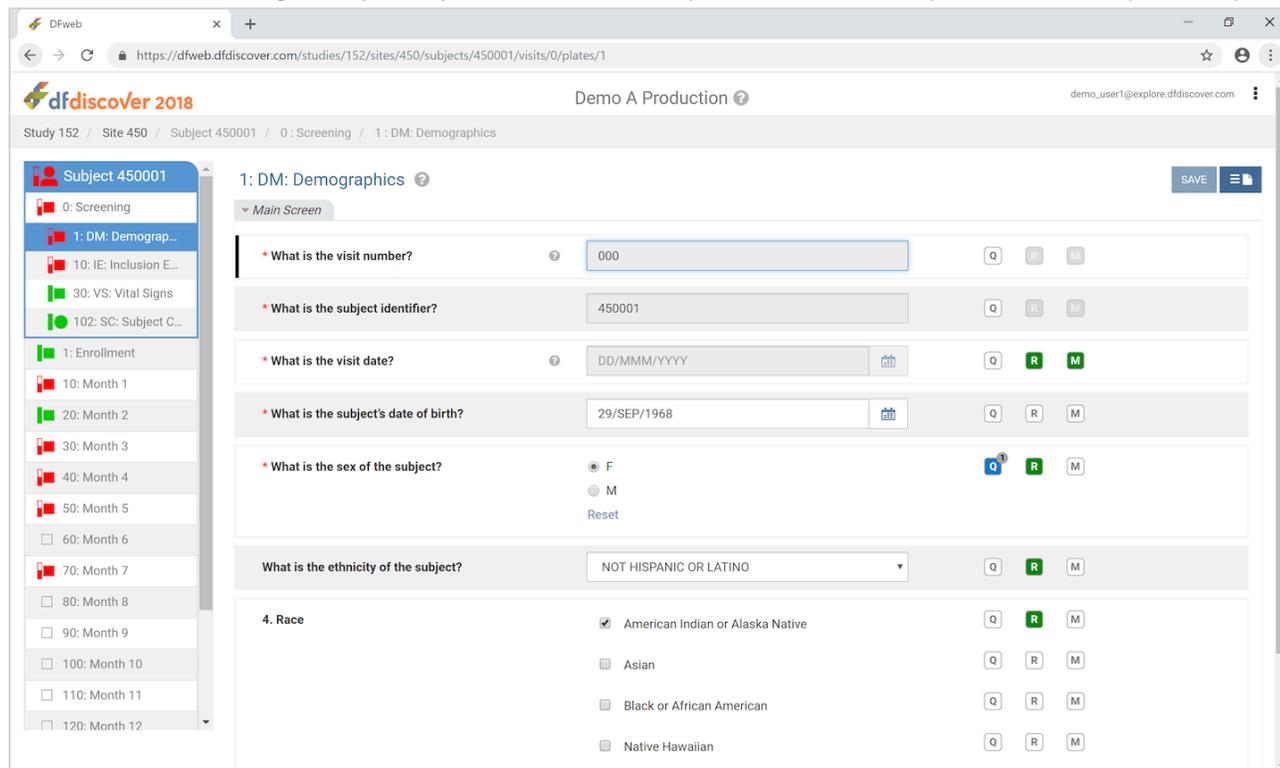
- 5.0.2 is the second patch to the 5.0.0 major release.
- 5.2.1 is the first patch to the 5.2.0 minor release.

Chapter 1. New Features in DFdiscover 2018 Version 5.1.0

1.1. DFweb

DFweb is a new feature, built on top of the DFdiscover API, that offers direct data entry and review from an HTML5 capable web browser. There is no client application to install.

DFweb offers a targeted subset of features from **DFExplore**. **DFweb** is ideally suited for sites participating in a trial that are restricted from installing **DFExplore**, yet need to enter subject data, review subject data and respond to queries.



The screenshot shows the DFweb application interface in a web browser. The browser address bar shows the URL: <https://dfweb.dfdiscover.com/studies/152/sites/450/subjects/450001/visits/0/plates/1>. The application header includes the DFdiscover 2018 logo, the text "Demo A Production", and the user email "demo_user1@explore.dfdiscover.com". Below the header, the breadcrumb trail reads: "Study 152 / Site 450 / Subject 450001 / 0: Screening / 1: DM: Demographics".

The main content area is titled "1: DM: Demographics" and contains a "Main Screen" tab. On the left, there is a sidebar menu for "Subject 450001" with a list of visits: "0: Screening", "1: DM: Demograp...", "10: IE: Inclusion E...", "30: VS: Vital Signs", "102: SC: Subject C...", "1: Enrollment", "10: Month 1", "20: Month 2", "30: Month 3", "40: Month 4", "50: Month 5", "60: Month 6", "70: Month 7", "80: Month 8", "90: Month 9", "100: Month 10", "110: Month 11", and "120: Month 12".

The data entry form includes the following fields:

- * What is the visit number? (Text input: 000)
- * What is the subject identifier? (Text input: 450001)
- * What is the visit date? (Text input: DD/MMM/YYYY)
- * What is the subject's date of birth? (Text input: 29/SEP/1968)
- * What is the sex of the subject? (Radio buttons: F (selected), M)
- What is the ethnicity of the subject? (Dropdown menu: NOT HISPANIC OR LATINO)
- 4. Race (List of checkboxes: American Indian or Alaska Native (checked), Asian, Black or African American, Native Hawaiian)

Each field has associated "Q", "R", and "M" buttons for query, review, and modify actions. A "SAVE" button is located in the top right corner of the form area.

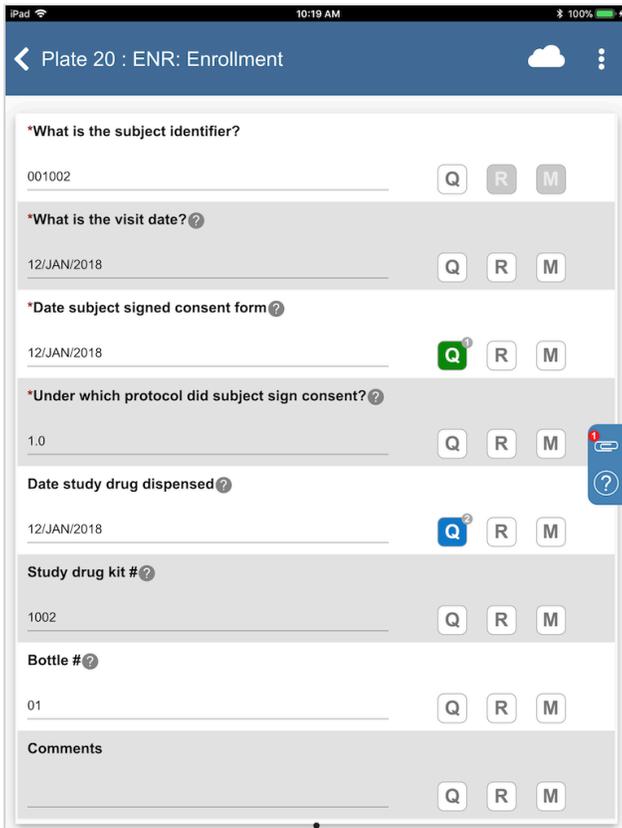
DFweb is an application built to demonstrate the power and flexibility of the DFdiscover API. It is provided to all licensed clients on an as-is basis. Please consider the following before deploying **DFweb**:

- Your DFdiscover server requires the **DFWS** feature. This is an additional part of the license that must be purchased and installed.
- **DFweb** may or may not be an appropriate tool for a specific clinical trial. Please consult with the clinical trial team to determine whether it meets study requirements and its use is permitted.
- **DFweb** does not (yet) support electronic signatures, lookup tables or study edit checks. For such trials, **DFExplore** is the correct tool.
- **DFweb** is actively developed and maintained. Improvements, new features and bug fixes may be released on a schedule that is independent of DFdiscover major or minor releases. The version number and build date information on the login banner indicate when this has occurred. There is nothing to install to take advantage of the newest features. There is also no way to opt-out of the updates.

1.2. DFcollect

DFcollect is a new tablet application, available for Android through the Google Play Store, and for iOS through the App Store. Like **DFweb**, it is built on top of the DFdiscover API and offers direct entry and review of data in permitted DFdiscover studies.

DFcollect is ideally suited for sites participating in a trial where mobile data collection is needed. **DFcollect** is able to work in online and offline settings.



DFcollect is an application built to demonstrate the power and flexibility of the DFdiscover API. It is provided to all licensed clients on an as-is basis. Please consider the following before deploying **DFcollect**:

- Your DFdiscover server requires the DFWS feature. This is an additional part of the license that must be purchased and installed.
- **DFcollect** may or may not be an appropriate tool for a specific clinical trial. Please consult with the clinical trial team to determine whether it meets study requirements and its use is permitted.
- **DFcollect** does not (yet) support electronic signatures, lookup tables or some built-in edit check functions.¹ For such trials, **DFexplore** is the correct tool.
- **DFcollect** is actively developed and maintained. Improvements, new features and bug fixes may be released on a schedule that is independent of DFdiscover major or minor releases. To take advantage of the latest features and fixes, check the Google Play Store or the iOS App Store. To always have the most recent version installed:
 - On Android, check **Enable auto update**. Further information is available on [this Google Play help page](#).

¹ The following edit check functions are not implemented in this release: `dfexecute`, `dfmail`, `dfmetastatus`, `dfmode`, `dfmoveto`, `dfneed`, `dfpref`, `dfprefinfo`, `dfstay`, `dftask`, `dftrigger`, `dfaddmpqc`, and `dfdelmpqc`.

- On iOS, enable **Automatic Downloads** or **App Updates**. Consult [this Apple support page](#) for more information.

1.3. Subject Schedule Reporting

Subject schedule calculation and reporting has been significantly re-implemented in this release. It is now possible to view and track visitmap schedule and compliance without the need for missing page or overdue visit queries. The new Schedule View provides all of the needed information.

It is also now possible to update and filter the schedule report by a subset of subjects or sites, as well as the previously available method for the entire study.

| Subject Schedule | | | | | | Missing and Overdue | | | | | |
|------------------|---------------------|-------------|------|------|------------|---------------------|--------|-------|----------|----------------|--|
| Subject | Outstanding Queries | Entry Visit | Name | Date | | Subject | Visit | Plate | Category | Conditions Met | |
| 1 | 450001 | 10 | 1 | ENR | 2017-08-27 | 1 | 450001 | 1 | 40 | missing page | |
| 2 | 450002 | 3 | 1 | ENR | 2018-11-02 | 2 | 450001 | 1 | 60 | missing page | |
| 3 | 450003 | 8 | 1 | ENR | 2018-11-21 | 3 | 450001 | 10 | 30 | missing page | |
| 4 | 450004 | 7 | 1 | ENR | 2018-12-12 | 4 | 450001 | 10 | 50 | missing page | |
| 5 | 450005 | 3 | 1 | ENR | 2020-02-11 | 5 | 450001 | 10 | 110 | missing page | |
| 6 | 450006 | 4 | 1 | ENR | 2018-11-21 | 6 | 450001 | 10 | 120 | missing page | |
| | | | | | | 7 | 450001 | 10 | 130 | missing page | |

| Visit Schedule Info | | | | | | | Unexpected Visits and Plates | | | | | | | |
|---------------------|--------|------|------------|--------|------------|---------|------------------------------|--------|------|---------|------------|--------|------------|-------------|
| Subject | Visit | Name | Type | Status | Compl | | Subject | Visit | Name | Plates | Unexpected | Status | Problem | |
| 1 | 450001 | 0 | Screening | X | incomplete | invalid | 1 | 450002 | 10 | Month 1 | 101 | plate | final | Excluded by |
| 2 | 450001 | 1 | Enrollment | B | final | 2017-0 | 2 | 450002 | 20 | Month 2 | 101 | plate | incomplete | Excluded by |
| 3 | 450001 | 10 | Month 1 | S | incomplete | | 3 | 450002 | 80 | Month 8 | 101 | plate | incomplete | Excluded by |
| 4 | 450001 | 20 | Month 2 | S | final | 2018-1 | 4 | 450003 | 10 | Month 1 | 101 | plate | incomplete | Excluded by |
| 5 | 450001 | 30 | Month 3 | S | incomplete | 2018-1 | 5 | 450003 | 20 | Month 2 | 101 | plate | final | Excluded by |
| 6 | 450001 | 40 | Month 4 | S | incomplete | | 6 | 450003 | 30 | Month 3 | 101 | plate | final | Excluded by |

| Cycles | | | | | | | Correction Queries | | | | | | | | |
|---------|--------|------|---------------------|------|----------|------------|--------------------|-------|--------|-------|--------|----------|--------------------|---------------|---------|
| Subject | Cycle | Name | Type | Need | Status | Terminz | Subject | Visit | Plate | Field | Status | Category | Use | | |
| 1 | 450001 | 0 | Screening Cycle | S | required | incomplete | .U | 1 | 450001 | 0 | 1 | 10 | Outstanding | Missing | Externa |
| 2 | 450001 | 1 | Scheduled Cycle | R | required | incomplete | | 2 | 450001 | 0 | 10 | 12 | Outstanding | Inconsistent | Externa |
| 3 | 450001 | 2 | End Cycle/Log Forms | E | end | | | 3 | 450001 | 0 | 10 | 9 | Resolved NA | Missing | Externa |
| 4 | 450002 | 0 | Screening Cycle | S | required | incomplete | 2018-1 | 4 | 450001 | 0 | 30 | 43 | Outstanding | Inconsistent | Externa |
| 5 | 450002 | 1 | Scheduled Cycle | R | required | incomplete | | 5 | 450001 | 0 | 30 | 41 | Outstanding | Missing | Externa |
| 6 | 450002 | 2 | End Cycle/Log Forms | E | end | final | | 6 | 450001 | 1 | 30 | 11 | Resolved corrected | Monitor Query | Externa |

| Cycle Visits | | | | | | | Clarification Queries | | | | | | | | |
|--------------|--------|-------|------------|------|----------|--|-----------------------|--------|-------|-------|--------|-------------|---------|----------|-------------|
| Subject | Cycle | Visit | Name | Type | Need | | Subject | Visit | Plate | Field | Status | Category | Use | Name | |
| 1 | 450001 | 0 | Screening | X | required | | 1 | 450004 | 1 | 20 | 11 | Outstanding | Illegal | External | 3. Date stu |
| 2 | 450001 | 1 | Enrollment | B | required | | | | | | | | | | |
| 3 | 450001 | 1 | Month 1 | S | required | | | | | | | | | | |
| 4 | 450001 | 1 | Month 2 | S | required | | | | | | | | | | |
| 5 | 450001 | 1 | Month 3 | S | required | | | | | | | | | | |
| 6 | 450001 | 1 | Month 4 | S | required | | | | | | | | | | |

DF_QCupdate and **DF_QCreports** continue to be available and function independent of Schedule View. There are a few notable differences between the two approaches:

- There are differences in the syntax allowed for expressing conditions. Schedule View implements a subset of the syntax that **DF_QCupdate** implements. Specifically, Schedule View understands:

| Test Operator | Examples |
|-----------------------|--------------------------|
| equal | =42, =2018/05/30, =AB |
| not equal | !=42, !=2018/05/30, !=AB |
| less than | <42, <2018/05/30, <AB |
| less than or equal | <=42, <=2018/05/30, <=AB |
| greater than | >42, >2018/05/30, >AB |
| greater than or equal | >=42, >=2018/05/30, >=AB |

| Test Operator | Examples |
|---------------------------------------|----------------------|
| contain | ~4, ~2018/05, ~AB |
| not contain | !~4, !~2018/05, !~AB |
| is blank | blank |
| is not blank | !blank |
| contains a missing value code | missing |
| does not contain a missing value code | !missing |

- In Schedule View, a missed visit or missed plate does not by itself signal that a visit or cycle has occurred; in **DF_QCupdate** it does.
- **DF_QCupdate** can only be run by a user that has full database permissions; Schedule View computes the schedule results for the sites and subjects that the user is permitted to see and further needs only read permission.
- In Schedule View, internal queries are included if:
 1. the user has permission to view internal queries on at least one plate (and then all internal queries are included)
 2. **include internal queries** is checked

1.4. Audit History available as Excel

The capability to review the change history for a data field or CRF, at the subject, site or entire study level has been augmented to include an export to Excel option. This capability is available to permitted users in **DFexplore** and to the study admin through the **DFexport** application.

| | A | B | C | D | E | F | G | H | I | J | K |
|----|---------------------|-----------|-------------|---------|-------|-------|--------------------------|-------------|---------------------|----------------------------|---|
| | Date and Time | User Name | Type | Subject | Visit | Plate | Data Field Description | Old Value | New Value | Query Category/Reason Code | |
| 83 | 2018-05-24 11:53:58 | rheanna | new query | 3000 | 0 | 30 | SDV Check | | | SDV | |
| 84 | 2018-05-24 11:53:58 | rheanna | new query | 3000 | 0 | 30 | SDV Check | | SDV Check | SDV | |
| 85 | 2018-05-24 11:53:58 | rheanna | new query | 3000 | 0 | 30 | SDV Check | | SDV | SDV | |
| 86 | 2018-05-24 11:53:58 | rheanna | new query | 3000 | 0 | 30 | SDV Check | | 30 | SDV | |
| 87 | 2018-05-24 11:53:58 | rheanna | new query | 3000 | 0 | 30 | SDV Check | | 2 | SDV | |
| 88 | 2018-05-24 11:53:58 | rheanna | new query | 3000 | 0 | 30 | SDV Check | | SDC Review Required | SDV | |
| 89 | 2018-05-24 11:53:58 | rheanna | new query | 3000 | 0 | 30 | SDV Check | | SDV Reviewed | SDV | |
| 90 | 2018-05-24 11:54:05 | rheanna | change data | 3000 | 0 | 30 | DFdiscover Record Status | 2 | 1 | | |
| 91 | 2018-05-24 11:54:05 | rheanna | change data | 3000 | 0 | 30 | SDV Local Time | 08:53 | 08:54 | | |
| 92 | 2018-05-24 11:54:05 | rheanna | change data | 3000 | 0 | 30 | SDV GMT Time | 15:53 | 15:54 | | |
| 93 | 2018-05-24 12:02:45 | rheanna | change data | 3000 | 0 | 30 | Visit Date | 12/DEC/2017 | 12/DEC/2016 | | |
| 94 | 2018-05-24 12:02:45 | rheanna | change data | 3000 | 0 | 30 | SDV Local Time | 08:54 | 09:02 | | |
| 95 | 2018-05-24 12:02:45 | rheanna | change data | 3000 | 0 | 30 | SDV GMT Time | 15:54 | 16:02 | | |

The legacy report **DF_ATmods** remains available for users that prefer the older text-based output.

Chapter 2. Supported Configurations and Known Issues

2.1. Supported Configurations

DFdiscover 2018 Version 5.1.0 is supported in the following configurations:

- **Server:**

- OpenSUSE version 13.2 and newer, Leap 42.1 and newer
- SUSE Tumbleweed
- RedHat Enterprise Linux up to version 7.2 and newer

DFdiscover is a 64-bit server application. It installs on the 64-bit versions of any of these Linux distributions. It will not run on 32-bit systems. Other Linux distributions may work, but are unsupported. Debian distributions such as Ubuntu will not work at this time. CentOS and Oracle Linux are clones of RHEL and will work as expected.

Solaris is not supported.

- **Client:**

- Windows 10 and newer
- OS X 10.12 (Sierra) and newer

2.2. Known Issues

Issues are identified by operating system or application if they are not generally applicable.

- **Windows 10 with HiDPI displays.** At low resolution, some features of the display are too large compared to high resolution. At 1024 x 768, scrollbars, radio buttons, and arrows appear proportionally larger than at high resolution.
- **OS X.**
 - Cmd+T, Cmd+B are available only if the system preference General > Show scroll bars is set to Always.
 - The fill color from the color picker in **DFsetup** changes slightly as it moves from the color picker dialog to the field properties. If the value is directly entered as displayed in the color picker dialog, the result is correct.
 - The behavior of the Copy and Paste keyboard shortcuts is inconsistent. In some environments, the keyboard shortcuts are handled by the operating system and in some they are handled, correctly, by **DFsetup**. Use the menu items to avoid this problem.
- **Windows and OS X.** Ctrl+Z (Windows) and Cmd+Z (OS X) do not work if the field also auto expands.
- **DFexplore.**
 - A few reports, Database Setup, DF_SSvars, and DF_SSschema, do not include screen breaks and grouping. Exporting to excel does not include screen breaks and grouping.
 - The Categorical Age charts in the Queries by Site incorrectly label the x-axis as 'Days' when it should be '# of Queries'.

- Legacy Reports do not generate Excel output.
- Resuming a previous session which was timed out and then immediately switching to a Dashboard View which takes several seconds to update may cause the display to not update completely. Re-executing the view switch, or re-selecting the current view, resolves the issue.
- In the customization panel for Dashboard View, the Subject Tracking group is shown but does not contain any options. It should not be shown.
- **DFsetup.**
 - eCRFs do not have support for multiple languages. There is no support for printing an annotated eCRF (use Reports View as a workaround).
 - The Query Category Map dialog highlights all rows, not just the editable row which has the focus. All other dialogs correctly highlight only the row with the focus. This is a visual artefact - the editing behavior is correct.
 - In the CRF view, the **Fill Color** input field has moved to be before the **Display** input field. In Field List view, it still appears after the **Display** column.
- **DFcollect.** It is possible to briefly edit the value in a choice or check data field even though the field has a field entry edit check that uses `dfaccess` to disable the field. Applying `dfaccess` during plate entry prevents this timing problem from occurring.
- **DFcollect Android.**
 - Text input fields will default to capitals automatically.
 - The auto logout timer is not 100% accurate. On slower CPUs and older tablets, it can drift so that the actual timeout interval is longer than expected.
- **DFweb.**
 - **DFweb** has minimal accessibility support.
 - The date value auto-formatter can become confused if the last character of a delimiter is also an allowable character (or digit) in the date part that follows the delimiter.

Chapter 3. New and Changed Features

This chapter provides a summary of all changes to DFdiscover since DFdiscover 2018 Version 5.0.0.

3.1. Summary of All Changes

The changes are identified as one of the following type:

- **doc-fix.** This is a fix that was applied to the documentation only.
- **sw-fix.** This is a fix that was applied to the software.
- **sw-new.** This is a completely new feature of the software.

| | Type | Synopsis |
|-----|---------|--|
| 1. | doc-fix | The help documentation system has been updated to DocBook v5, bringing several presentation benefits with it. Of primary benefit, PDF generation is now built upon FOP, the industry standard that allows greater programmatic control over page layout. |
| 2. | doc-fix | Documentation errata have been applied to all published end-user documentation. |
| 3. | doc-fix | An index has been added to each published user guide. |
| 4. | sw-fix | A minor bug in the login dialog, that can cause a click of Login to be ignored, has been fixed. |
| 5. | sw-fix | The date picker in DFsetup and DFexplore has been updated to synchronously refresh the month/day display when the year is changed. |
| 6. | sw-fix | The status tabs in DFadmin have been fixed to synchronously apply the selected filter. |
| 7. | sw-fix | Several minor look-and-feel issues in DFsetup have been fixed. |
| 8. | sw-fix | The add study dialog, in DFadmin Studies tab, has been fixed to only allow valid study numbers. |
| 9. | sw-fix | The plates view in DFsetup has been updated to include a column for plate help. This will further allow plate help to be included when exporting to Excel. |
| 10. | sw-fix | The maximum time for DFadmin auto logout interval is 60 minutes. Previously values greater than 60 minutes, up to 99 minutes, were allowed, but not saved. |
| 11. | sw-fix | Several minor issues related to the coding tables in DFsetup have been fixed. |
| 12. | sw-fix | Following the JWT standard, DFws has been updated to use/require base64url encoded tokens. |
| 13. | sw-fix | DFmaster.rpcd has been updated to accept user passwords, without change, when migrating from previous DataFax systems. |
| 14. | sw-fix | DFws has been updated to fix a crash condition that could happen during an unexpected connection termination by the client. |
| 15. | sw-fix | Batch edits view in DFexplore now ensures that control files have a proper filename extension. |
| 16. | sw-fix | In DFexplore and DFadmin , there are some keyboard shortcuts that are overloaded and hence behave inconsistently. This has been corrected. |
| 17. | sw-fix | An inconsistency in the button status (some disabled buttons should be enabled) for various View actions in DFsetup has been fixed. |
| 18. | sw-fix | Use of the Esc key to abort the active dialog, without applying changes, has now been implemented consistently across all desktop applications. |
| 19. | sw-fix | A bug in the Select All action while in DFsetup 's Plates view has been fixed. |
| 20. | sw-fix | Several button behaviors in DFsetup View menu items have been improved for consistency. |

| | Type | Synopsis |
|-----|--------|---|
| 21. | sw-fix | In DFexplore on OS X, it is possible to close a study in which a report is currently running, rendering the application unresponsive. This issue has been corrected. |
| 22. | sw-fix | The web context menu has been removed from all windows which display HTML output (help and reports). It served no purpose and was unresponsive in DFexplore and DFsetup . |
| 23. | sw-fix | In DFexplore , when running a report from the history list, the options used to run the report are not restored in the Options field. This issue has been corrected. |
| 24. | sw-fix | A bug in de-referencing of some meta-words, such as $\$(plate)$, in legacy applications has been fixed. |
| 25. | sw-fix | A bug that could cause the Copy menu item to disappear from the Edit or Action menus in DFadmin has been fixed. |
| 26. | sw-fix | The ATK has been updated to include modules for DFcollect and DFweb . |
| 27. | sw-fix | A permissions bug that prevented DFexplore users from marking a record as Missed has been fixed. |
| 28. | sw-fix | The edit check <code>dfhelp()</code> now also updates the help message in the metadata panel and the hover text. |
| 29. | sw-fix | An update has been applied to the behavior of settings in the batch edit checks control file. Specifically, with <code>apply</code> set to <code>none</code> , <code>dfmail()</code> and <code>dfexecute()</code> behave the same as <code>dfmessage()</code> , echoing the argument as a message <i>without executing it</i> . |
| 30. | sw-fix | Several bugs in DFexplore have been fixed: <ul style="list-style-type: none"> • if there are unsaved changes to the current record on-screen, selecting Plate > Attach Subject Document must prompt the user to save the record first. • several bugs have been fixed in the metadata panel. • in the image viewer, correctly orient rotated images. • in Data view and Image view, the width of the drop-down list for Choice fields has been fixed. • edit check <code>dfaddqc()</code> removes the trailing blanks in query detail and note properties. • edit check <code>DFopen_patient_binder()</code> is prevented from being recursive which previously could cause DFexplore to exit unexpectedly. • the data entry window background is now filled using the plate Fill Color defined in the study setup. • Help > Study Help, Help > Plate Help and Help > Field Help now render help text encoded with html in the same manner as the metadata editor panel does. • a leftover reference to 'QC' in the data import dialog has been corrected to 'Query'. • in Batch view - Edit Check Lookup dialog, the edit check parameters have been removed from the picklist of edit checks. • a bug in the combination of using Field > Revert to Last Save and not having data modify permission has been fixed. |
| 31. | sw-fix | A bug that could cause DFmaster.rpcd to crash while processing a malformed <code>DFstudies.db</code> , <code>DFinbound.db</code> or <code>DFoutbound.db</code> file, has been fixed. |

| | Type | Synopsis |
|-----|--------|---|
| 32. | sw-fix | DFsetup now warns users when the fields on an eCRF will extend beyond 4 virtual pages in length. |
| 33. | sw-fix | DFserver.rpc has been updated to gracefully handle the addition of new choice fields on an eCRF that do not have any code value/label pairs defined. |
| 34. | sw-fix | To support being offline, DFcollect captures the actual data entry time in UTC during the save action. This UTC time is updated to server time when DFcollect returns to an online state and syncs the local data to the server. |
| 35. | sw-fix | Several enhancements have been added to the Save to Excel feature in DFsetup . Improvements have been made to headings, page level markup and formatting of HTML help. |
| 36. | sw-fix | A bounds checking error in DFcompiler , that could cause it to hang with very long study, plate, or field help properties, has been fixed. |
| 37. | sw-fix | The standard eSignature module has been updated to include metadata related to the reason for an eSignature. |
| 38. | sw-new | A new administration tool for DFws, DFwsadmin, has been added to administer API client accounts, log activities and more. |
| 39. | sw-new | DFcollect is a new client application, built on top of the DFdiscover API, that offers direct data entry and review, online and offline, on Android and iOS tablets. |
| 40. | sw-new | Additional legacy reports from DataFax have been updated to generate the new HTML / Excel output style. |
| 41. | sw-new | DFweb is a new client application, built on top of the DFdiscover API, that offers direct data entry and review from an HTML5 capable web browser. |
| 42. | sw-new | Several new service requests have been added to DFedcservice and DFws. |
| 43. | sw-new | The methodology for calculating missing plates, overdue visits and the overall subject status has been simplified, made more granular and significantly sped up. |
| 44. | sw-new | The API request for client generated password updates has been modified to support optional encoding. DFedcservice enforces encoding for accounts with expired or temporary passwords. |
| 45. | sw-new | The Export to Excel feature in all tools has been standardized to include the advanced styling dialog and an option to open the Excel document after the export completes. |
| 46. | sw-new | Several features, which aid in the task of creating SDTM compatible data sets, have been added to DFexport . |
| 47. | sw-new | The Password field in the login dialog for each application now shows that the caps-lock key is on. |
| 48. | sw-new | The File Print and File Save As PDF actions in DFsetup have been standardized. |
| 49. | sw-new | It is now possible to zoom the contents of undocked report windows in DFexplore . Previously this was limited to the active, docked window. |
| 50. | sw-new | Improvements have been made to the handling of query replies. Specifically, <ul style="list-style-type: none"> • the new <code>dfreplyqc()</code> function allows the edit check programmer to specify conditions under which a query reply can be generated automatically, • a new lookup table named <code>QCREPLY</code>, for defining standard query replies, is available. |
| 51. | sw-new | New functions <code>dfstudyinfo()</code> and <code>dfpageinfo()</code> have been added to the edit checks language. Analogous requests for exportable metadata in DFexport have also been added. |
| 52. | sw-new | DFaudittrace , DFexport and DFexplore now support saving the complete page or field change history to an Excel file. The output can be filtered by subject, site or study. |

| | Type | Synopsis |
|-----|--------|--|
| 53. | sw-new | References to www.datafax.com in visual elements and exported metadata have been updated to www.dfnetresearch.com. |
| 54. | sw-new | The ability to clone field definitions across modules has been added to DFsetup . |
| 55. | sw-new | In DFexplore , the contents of the dashboard are now customizable and may include reports. |

Chapter 4. Installation

This release of DFdiscover is a complete release. It can be installed as a new install or as an upgrade of any previous release. Existing studies will continue to work in the updated installation, once migrated with the **DFmigrate** utility (required for upgrades from pre-2014.X releases).

4.1. Pre-upgrade Steps

The steps in this section are required only for an upgrade installation. Skip this section if you are performing a new installation on a system where DFdiscover is not running.

4.1.1. Halt DFdiscover

Before installing, the existing DFdiscover installation must be stopped.

To halt DFdiscover,

1. **Ensure that all users have exited DFdiscover.**

This is easiest if the installation is performed at a pre-arranged time when all users are known to be out of DFdiscover.

2. **Shutdown DFdiscover.**

As the DFdiscover administrator, shutdown is initiated using the command:

```
% /opt/dfdiscover/bin/DFshutdown -f
```

4.1.2. Halt HylaFAX if required

If you are using HylaFAX to send and receive faxes, you must stop the existing HylaFAX installation. If you are using Protus fax services you can skip this step.

To halt HylaFAX,

1. **Wait for incoming/outgoing faxes to terminate.**

Use **faxstat** to monitor the status of any faxes that are being received or sent, as in:

```
# /opt/hylafax/bin/faxstat -a
```

For each idle modem, turn the modem off - this will prevent it from answering another incoming call. Repeat as necessary until all modems are off.

2. **Shutdown HylaFAX daemons.**

As super-user, this can be accomplished using the command:

```
# /etc/init.d/hylafax stop
```

3. **Disable faxgetty processes.**

A **faxgetty** process is spawned by **init** for each defined modem. These processes must be disabled separately. Edit the `/etc/inittab` file and for each record that references **faxgetty**, replace the word `respawn` in field 3 with `off`. Save the changes and exit the file.

The `init` process must be informed that the file has been updated. Do this with the command:

```
# kill -1 1
```

This is the end of the pre-upgrade steps.

4.2. Installation

Release 5.1.0 is a complete release that includes all components. Installation of complete releases is documented in the [Software Installation Guide](#). Follow the instructions in that guide.

4.3. Post-upgrade Steps

4.3.1. Restart DFdiscover

DFdiscover must be restarted following the upgrade. To restart, as super-user, use the command:

```
# /opt/dfdiscover/bin/DFbootstrap
DFmaster.rpcd: your software license expires in 290 days
1. Checking state of incoming daemons...
2. Checking /opt/dfdiscover/work/.dfincoming_work...
   0 stale incoming entries obsoleted
3. Checking /opt/dfdiscover/incoming...
   0 faxes awaiting processing.
   # DFmaster.rpcd: started.
Done.
```

4.3.2. Update value of `CDN_URL`

This step is required only if upgrading from a previous DFdiscover release, and is not required for new installs or when upgrading from a previous DataFax release.

This release includes updated resources used during the display of graphical report output. Those resources are specified in the value of `CDN_URL` in the system master configuration. To inspect and update the value:

1. Start **DFadmin**.
2. Click the **Master** tab to display the master configuration panel.
3. Inspect the value specified for **CDN_URL**.
4. If the value reads `https://cdn.dfdiscover.com/v5.1`, it is already up-to-date and no change is needed. Exit **DFadmin**.
5. Otherwise, update the value to read `https://cdn.dfdiscover.com/v5.1`.
6. Click **Save** to apply the change.
7. Exit **DFadmin**.

4.3.3. Restart HylaFAX if required

If you use HylaFAX, it must be restarted following the upgrade. To restart, as super-user:

1. **Enable faxgetty processes.**

Edit the `/etc/inittab` file and for each record that references **faxgetty**, replace the word `off` in field 3 with `respawn`. Save the changes and exit the file.

The **init** process must be informed that the file has been updated. Do this with the command:

```
# kill -1 1
```

2. **Restart HylaFAX daemons.**

As super-user, issue the command:

```
# /etc/init.d/hylafax start
```

This is the end of the post-upgrade steps.

4.4. Documentation

Documentation Updates

The documentation included with the release rpm, and the client packages, is a snapshot of the documentation at the time that the release was built.

The documentation is maintained and updated regularly. For the most up-to-date version of the documentation, please use the online documentation, hosted on www.dfnetresearch.com at [DFdiscover 2018 Version 5.1.0](#).

Release 5.1.0 is accompanied by updates to all of the documentation. The documentation is installed on the server into the `doc` directory as part of the installation process.

The documentation for the release is available in the following formats:

- HTML
- PDF

4.4.1. HTML documentation

This is the "native" documentation format for DFdiscover and is displayed when selecting the **Help > Topics** menu item in each client tool.

The documentation can be found under the `doc` directory of `/opt/dfdiscover`. The main index page that is the starting point for all of the documentation is `/opt/dfdiscover/doc/allman/html/index.html`.

The HTML documentation can be copied from the `/opt/dfdiscover/doc` directory to a suitable location on a web server by simply copying the entire `doc` directory hierarchy to a new location. It is important to maintain the relative positions of files and directories within that hierarchy so that the across-guide hyperlinks stay intact. The original `doc` hierarchy should additionally be maintained, if possible, as this is the location that the help browsers built-in to the DFdiscover tools expect.

The documentation can also be viewed with traditional web browsers such as Edge, Firefox, Chrome, Safari, etc.

4.4.2. PDF documentation

The documentation set includes PDF documentation in separate files for each of the software manuals.

The PDF documentation can be found under the `doc` directory of `/opt/dfdiscover`. The PDF file for a specific manual is located below this directory in a further `manual/pdf` directory. For example, the PDF file for the Programmer's Guide (progman) is `/opt/dfdiscover/doc/progman/pdf/progman.pdf`.

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5.1.13. MariaDB and FreeTDS

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5.1.16. c3.js

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5.1.17. d3.js

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