



DFdiscover 2025 Version 5.10

Release Highlights



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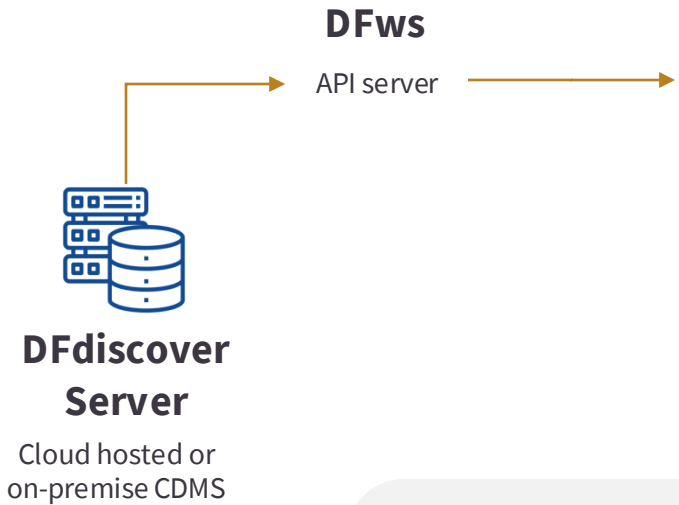
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About DFdiscover CDMS

- 30+ years of evolution in clinical data management
- Flexible, highly customizable solution with security, reliability, and compliance at its core
- Multimodal data capture: desktop, tablet, mobile; EDC, eSource, ePRO, paper
- Cornerstone for data management across research sectors, phases, therapeutic areas, and sample sizes





Web and mobile apps



DFweb
Web app for browser-based EDC



DFcollect
Tablet app for online/offline EDC



DFengage
Web & mobile app for study participants



DFsources
Mobile app for source document submission

Desktop apps for power users

Desktop apps for paper studies



DFexplore
Data collection and management



DFsetup
Study setup and configuration



DFadmin
User, study, and server admin



DFatk
Acceptance Test Kit



DFsend
Submit scanned paper CRFs



DFbarcode
Create barcodes for paper CRFs

Client-side command-line programs: DFattach, DFaudittrace, DFbatch, DFexport, DFpass, DFpdfpkg, DFreport, DFuserPerms



DFdiscover 5.10.0 Release Highlights

DFdiscover 5.10 Key Features & Improvements

ePRO Management

ePRO Management for Sites & Study Teams in DFweb

Secure ePRO User Database & Logging

Activity Reminders to ePRO Participants via Email

DFengage ePRO Configurations

EDC Enhancements

Expanded eCRF Question Text Character Limits

Repeating Visit Folder Display Option in DFexplore

Field Navigation Taskbar Option for Touch Screens

Strengthened DFweb & DFcollect Permission Controls

Additional Updates

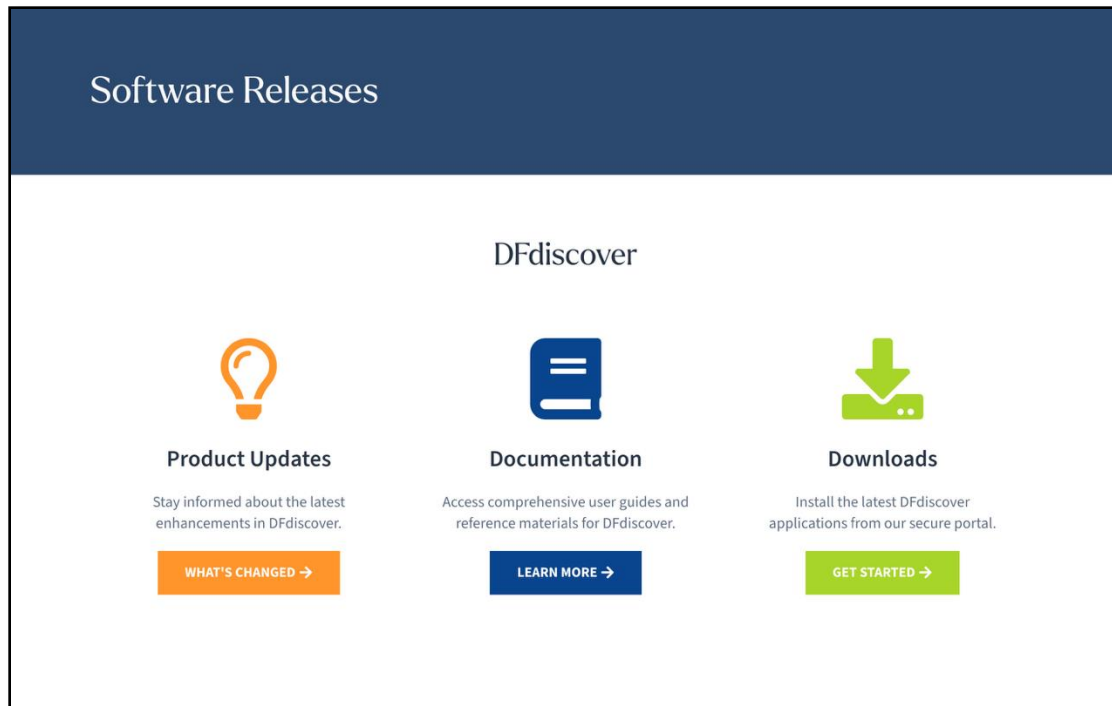
Setup Import Enhancements

Sensitive Data Encryption at Rest

User Profile Data Encryption at Rest

Security & Performance Improvements

DFnet Website Updates



- Find software downloads, installers, and updates more easily
 - Redesigned **Software Releases** page (account required)
 - Latest software updates on the **What's New** page (no account required)
- **Product Updates:** learn about the latest releases & patches
- **Documentation:** find user guides & release notes
- **Downloads:** get installers for desktop apps and servers

Learn more about DFdiscover 5.10

- **Release Notes:** details of new features and enhancements, upgrade process & compatibility, known issues, advance notices, including table listing of all changes
- **Release Highlights:** slide deck overview of new features and enhancements (this file)
- Available from [Documentation](#) page on DFnet Research website

DFdiscover Release Notes dfdiscover 2025

- Preface
- Introduction
 - Overview
 - Version Numbering
 - Software Components
 - Supported Devices
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 - Role Permission Considerations
- New Features and Enhancements
 - General
 - DFweb
 - DFcollect
- All Updates
- Known Issues
- Advance Notices
- Server Upgrade
- Copyrights

Introduction

Overview

DFdiscover 2025 Version 5.10.0 introduces meaningful enhancements that make clinical data management more efficient, secure, and reliable. It builds on the strong foundation of recent updates while adding new capabilities for participant engagement, efficient study builds, permission controls, improved system security, and overall usability.

Key features and enhancements in this release include:

- **ePRO Management:** DFweb's new ePRO Management page provides site staff and study teams with more control and transparency for the management of study participants using DFengage, providing a secure subject registration process and oversight capabilities. To support this new tool, **DFadmin** provides new user permissions to ePRO Management and restricts ePRO user profile access in DFadmin, to assure the protection and confidentiality of participants' personal identifying information.
- **Combine Repeating Forms in One Visit:** Consolidate the subject binder by grouping repeating forms (such as

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ePRO Management



DFweb ePRO Management



ePRO Management in DFweb

- Site staff register, track, and support ePRO participants
- Securely capture participant contact details
 - Support forgot password, two-factor authentication, email reminders
- Controlled access through user permissions
- ePRO user profile data encrypted and not accessible in DFadmin

The screenshot shows the 'ePRO Management' interface in DFDiscover. It displays a summary of 5 total registered participants and a table of individual records. The table columns are Subject, Username, Status, Name, Contact, and Last Sync. The status column uses color-coded boxes to indicate the participant's current state: Overdue (red), Due Now (blue), Complete (green), Upcoming (light blue), and Inactive (grey).

Subject	Username	Status	Name	Contact	Last Sync
902-DEF-001	s804p902001	Overdue	Rina Anton	rina.anton@email.com	2025-10-30 18:02:09 UTC-04:00
902-DEF-002	s804p902002	Registered	Yuval Mauricio	yuval2000@email.com	
902-DEF-003	s804p902003	Due Now	Astrid Tapani	atapani@email.com	
902-DEF-004	s804p902004	Complete	Nikole Marta	martanik@email.com	2025-10-31 12:21:29 UTC-04:00
902-DEF-005	s804p902005	Upcoming	Peegil Rar	peegilr@email.com	
902-DEF-006	s804p902006	Inactive	Register >		
902-DEF-007	s804p902007	Inactive	Register >		



ePRO Management

ePRO Registration Purpose & Security

- Why is registration necessary? Email address allows:
 - Sending participant invite email to streamline onboarding
 - Sending new & overdue activity reminders by email
 - Sending login reminder emails on demand for participant support
 - Forgot password and two-factor authentication in DFengage
- Security & privacy considerations
 - Secure storage of participant profile data separate from standard users
 - Encryption of all user profile data to prevent backend access
 - Controlled access to ePRO management tools with or without PII access
 - Audit trail for ePRO admin access & ePRO user profile data

DFweb ePRO Management Tour



ePRO Management
5 Total Registered

Site 902 - Islandia H

Filter subject list by status

Overdue 1 | Due Now 1 | Complete 1 | Upcoming 1 | Inactive 5

Click on a row to view or edit subject details

Showing 10 of 10

Sort list by subject ID, username, status, last sync

Subject	Username	Status	Name	Contact	Last Sync	
902-DEF-001	s804p902001	Overdue	Rina Anton	rina.anton@email.com	2025-10-30 18:02:09 UTC-04:00	View data >
902-DEF-002	s804p902002	Registered	Yuval Maurício	yuval2000@email.com		View data >
902-DEF-003	s804p902003	Due Now	Astrid Tapani	atapani@email.com		View data >
902-DEF-004	s804p902004	Complete	Nikole Marta	martanik@email.com	2025-10-31 12:21:29 UTC-04:00	View data >
902-DEF-005	s804p902005	Upcoming	Peegil Rar	peegilr@email.com		View data >
902-DEF-006	s804p902006	Inactive				View data >

View details for registered subject

Open subject in CRF view

Register subject

Switch sites

Search current subject list



ePRO Management

Key Features

- Register participants with their name, email address, and other details
- Send invitation email to participants to set up their DFengage account
- Track current ePRO status of participants
- Review & update participant registration details
- Support participants with new invite or login links
- View audit trail of account updates and ePRO access
- **NOTES:**
 - User accounts must be created in DFadmin with subject ID and ePROdata role assignment before users appear in DFweb ePRO management tool
 - Baseline visit date must be entered in the CRF to initiate the ePRO visit schedule for each participant and make activities available to them in DFengage



ePRO Management Subject List

- Dashboard showing overall site ePRO status
- Quick view of individual participant's ePRO status
- Quickly identify any participants with overdue or due now activities for follow-up
- See when DFengage last synced with server
- View name & contact details to help avoid subject ID/identity mix-ups

DFdiscover 2025 Demo Demo Account (demo) explore.dfdiscover.com

ePRO Management 5 Total Registered Site 902 - Islandia H Search

Overdue 1 Due Now 1 Complete 1 Upcoming 1 Inactive 5

Click on a row to view or edit subject details Showing 10 of 10


Subject	Username	Status	Name	Contact	Last Sync
902-DEF-001	s804p902001	Overdue	Rina Anton	rina.anton@email.com	2025-10-30 18:02:09 UTC-04:00
902-DEF-002	s804p902002	Registered	Yuval Maurício	yuval2000@email.com	
902-DEF-003	s804p902003	Due Now	Astrid Tapani	atapani@email.com	
902-DEF-004	s804p902004	Complete	Nikole Marta	martanik@email.com	2025-10-31 12:21:29 UTC-04:00
902-DEF-005	s804p902005	Upcoming	Peegil Rar	peegilr@email.com	
902-DEF-006	s804p902006	Inactive	Register >		
902-DEF-007	s804p902007	Inactive	Register >		




ePRO Management

ePRO Status Types


Each subject's status reflects whether they've been registered yet, or the status of activities the participant sees in DFengage

 Inactive

- **Inactive** = Not yet registered, or user account deactivated

 Registered

- **Registered** = Registered but no activities scheduled yet (baseline visit date still required to initiate DFengage activities)

 Due Now


- **Due Now** = New activities available to complete now

 Overdue

- **Overdue** = Overdue activities available to complete now

 Upcoming

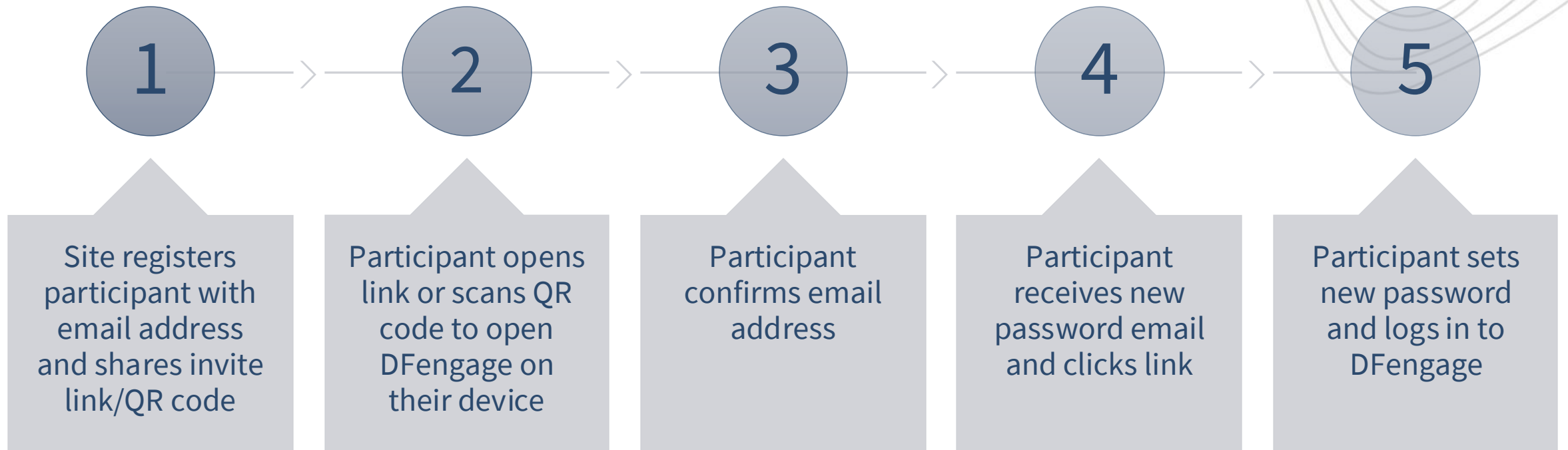
- **Upcoming** = Scheduled activities not due yet; no new or overdue activities

 Complete

- **Complete** = No overdue, due now, or upcoming activities

WEB OR MOBILE

ePRO Onboarding: In Person



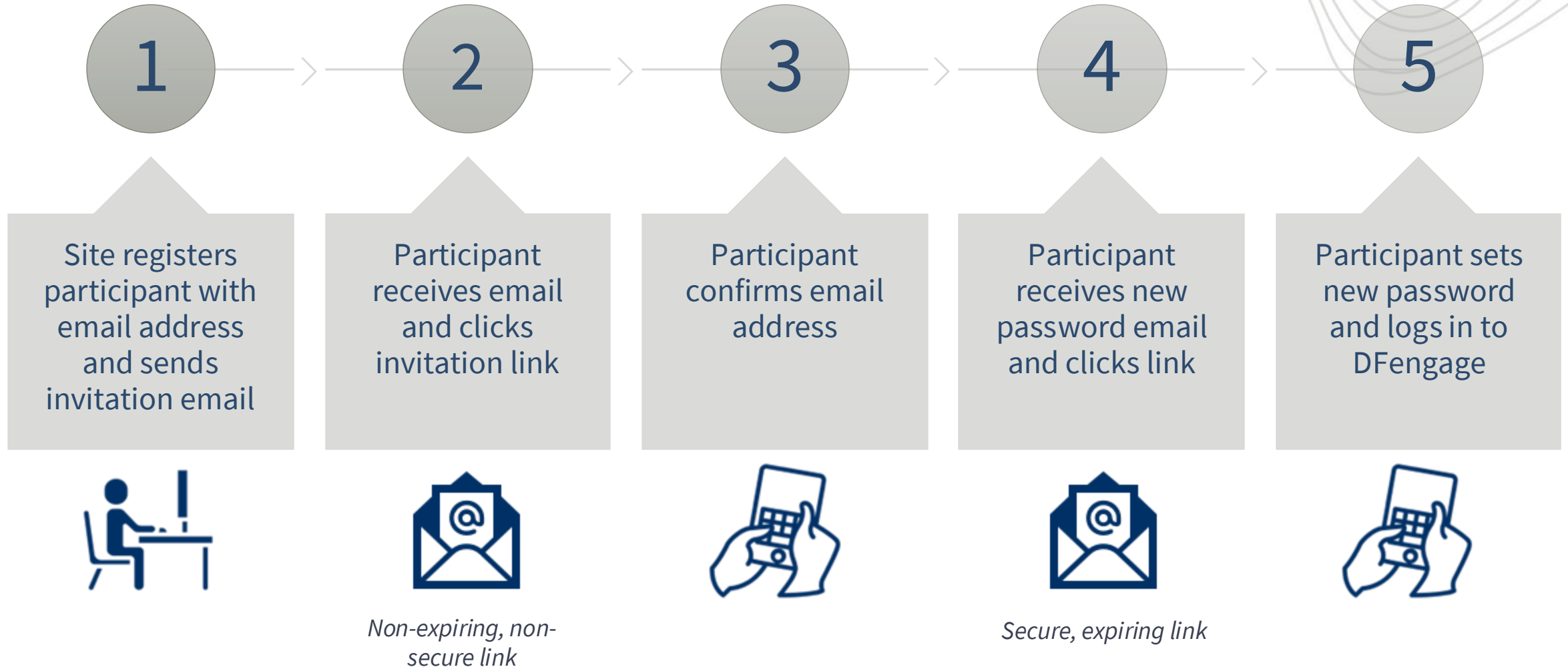
Non-expiring, non-secure link



Secure, expiring link



ePRO Onboarding: Remote Workflow





ePRO Management Subject Registration Process

902-DEF-006	s804p902006	Inactive	Register >
-------------	-------------	----------	-------------------------------

- Click **Register >** next to subject ID
- Provide subject details in the registration dialog
 - Registration dialog may be customized per study
 - At least one of name or email is required
 - Time zone and language are optional
 - Invite email: always sent, never sent, or on demand
- Verify subject ID, participant identity, consent, & eligibility
- Click **Register** to complete

ePRO Subject Registration - Subject 902-DEF-005

Provide the subject's details and confirm their subject alias to complete the registration.

Name
Peegil Rar

Email
peegilr@email.com

English

UTC-05:00 America/Toronto (EST)

Confirm Subject Alias
902-DEF-005

Send invite via email (peegilr@email.com)
[Preview invite](#)

I verify the name and contact information above is correct and belongs to the specified participant

I verify the participant has provided informed consent and is eligible to participate.

[Cancel](#) [Register](#)

Registration Complete

Subject 902-DEF-005 (username s804p902005) is now registered for ePRO.

[OK](#)



View & Edit Subject Details

- Click a registered subject in list to open
- View subject registration details
 - When invite was sent
 - When participant last logged in
 - When participant last synced their data
- Edit details if needed
 - Name, email, language, time zone
 - NOTE: Subject ID and username cannot be changed
- Login support options
- View account & access logs
 - Account log available to ePRO admin & monitor only
 - Access log available to all ePRO admin types

ePRO Subject Details [Edit](#)

Subject	902-DEF-001 ! Overdue
Username	s804p902001
Name	Rina Anton
Email	rina.anton@email.com
Language	English
Time Zone	UTC-05:00 America/Toronto (EST)
Invite Sent	
Registered	2025-10-30 at 17:40:28 UTC-04:00 by Demo Account (demo)
Last login	2025-10-31 at 12:03:44 UTC-04:00
Last sync	2025-10-30 at 18:02:09 UTC-04:00

Login support:

[Resend invitation](#) [Send login link](#) [Get link / QR code](#)

View logs:

[ePRO account log](#) [ePRO access log](#)

[OK](#)



ePRO Management

Login Support

Email & link types:

- Use **invite** if participant has not yet confirmed their email address or set a password
- Use **login** if participant knows their password but needs the link to access their activities

Login support options:

- Resend invitation email to registered email
- Send login link email to registered email
- Get link/QR code to copy/scan
 - Display invite/login QR code for participant to scan (in-person)
 - Copy link or QR code to share with participant separately

ePRO Subject Details [Edit](#)

Subject	902-DEF-001 ! Overdue
Username	s804p902001
Name	Rina Anton
Email	rina.anton@email.com
Language	English
Time Zone	UTC-05:00 America/Toronto (EST)
Invite Sent	
Registered	2025-10-30 at 17:40:28 UTC-04:00 by Demo Account (demo)
Last login	2025-10-31 at 12:03:44 UTC-04:00
Last sync	2025-10-30 at 18:02:09 UTC-04:00

Login support:

[Resend invitation](#) [Send login link](#) [Get link / QR code](#)

View logs:

[ePRO account log](#) [ePRO access log](#)

[OK](#)



ePRO Management

ePRO Account & Access Logs

Account Log

ePRO admin subject registration & user profile updates

Available for ePRO Admin & Monitor only

[<Back](#) ePRO Account Log: Subject 902-DEF-004

Date & Time (UTC-05:00)	Username	Action	Details
2025-10-30 18:28:58	demo	register user	Name: Nikole Marta
2025-10-30 18:28:58	demo	register user	Email: martanik@email.com
2025-10-30 18:28:58	demo	update user	Time Zone: UTC+00:00 Africa/Abidjan (GMT)
2025-10-30 18:28:58	demo	update user	ePRO Language: English
2025-10-31 12:17:36	demo	update user	Time Zone: UTC-05:00 America/Toronto (EST)

Access Log

Participant login & logout, start & submit ePRO activity

Available for ePRO Admin, Monitor, Viewer

[<Back](#) ePRO Access Log: Subject 902-DEF-004

Date & Time (UTC-05:00)	Username	Action	Details
2025-10-31 12:20:30	s804p902004	login	
2025-10-31 12:20:51	s804p902004	start activity	Study 804 > Site 902 > Subject 902004 > I1: Day 1 - Patient Reported > 22: Diary Day 1
2025-10-31 12:21:29	s804p902004	submit activity	Study 804 > Site 902 > Subject 902004 > I1: Day 1 - Patient Reported > 22: Diary Day 1
2025-10-31 12:22:09	s804p902004	login	
2025-10-31 12:22:52	s804p902004	logout	
2025-10-31 12:22:57	s804p902004	login	
2025-10-31 12:23:22	s804p902004	logout	
2025-10-31 12:24:22	s804p902004	logout	



ePRO Management

ePRO Admin Access Levels

Access controlled by user in DFadmin with three options:

- **Admin:** Site staff working directly with study participants
 - Full access to all functionality and PPI
- **Monitor:** CRA who reviews participant details & views logs *with access to PII*
 - Views participant name and contact (email, phone)
 - No ability to register participants, edit details, or send emails
 - Full access to view subject details and logs
- **Viewer:** Study team staff who can review ePRO info *without access to PII*
 - No access to participant name or contact (email, phone)
 - No ability to register participants, edit details, or send emails
 - Cannot view ePRO account logs; can view ePRO access logs



ePRO Management

Future Enhancements



Phone/SMS support: Send invites and reminders via text message



Download: Export ePRO status data and access logs



Extended reminders: Additional configuration for custom participant reminders



Bulk registration: Register multiple participants in one step



Activity details: ePRO status for all activities without opening subject binder



Anything else? Your feedback is important to us!



DFadmin ePRO Updates



ePRO Users in DFadmin

- Users are categorized as ePRO when **ePROdata** role is assigned for a single subject in a study
 - Role name is case sensitive
 - OK to append characters to role name, e.g., 'ePROdata Canada'
 - If any other active role is assigned, no longer an ePRO user
- User profile for ePRO users can only be viewed & modified on **DFweb** ePRO page by authorized users
- User profile cannot be viewed or updated in DFadmin, except 2FA setting (SSO only does not apply for DFengage)
- User profile data is encrypted in the database

Username s20p10007 Status Active New Password

User profile is hidden and can only be updated by ePRO Admins in DFweb

User Profile Preferences **Permissions** ePRO Admin Permissions History

Study or DFdiscover Administrator None

Allow access to Image Router

Study	Sites	Subjects	Role Name	
<input checked="" type="checkbox"/>	20 DFdiscover Solutions	1	10007	ePROdata
<input checked="" type="checkbox"/>				

Username s20p10007 Status Active New Password

User profile is hidden and can only be updated by ePRO Admins in DFweb

User Profile Preferences Permissions ePRO Admin Permissions History

Full Name

Affiliation

Address

City

State Postal Code

Country

Telephone

Fax

Email

Two-factor authentication required

SSO Only



ePRO Management Access Controls

- Access is defined per user in new **ePRO Permissions** tab in DFAdmin
- Three access types:
 - **Admin:** Site staff who registers participants with name and contact details, sends invite emails, view logs, etc. *Full access to PII*
 - **Monitor:** CRA who views participant details & views logs. *Full access to PII*
 - **Viewer:** Study team staff who can see registration and ePRO status without participant details. *No access to PII*

The screenshot shows the DFAdmin user management interface. At the top, there is a table listing users with columns for Username, Password Expiry, 2FA Status, SSO Only, Full Name, and Affiliation. The 'demo' user is highlighted in blue. Below the table, there are fields for Username (demo), Status (Active), and a New Password field. The 'ePRO Admin Permissions' tab is selected, showing a table of permissions for the specified studies. The permissions table has columns for Study, Type, and Sites.

Username	Password Expiry	2FA Status	SSO Only	Full Name	Affiliation
data_coordinator	2025-10-27			data_coordinator	DFnet
data_manager	2026-04-14			data_manager	DFnet
datafax	2026-02-17			DFdiscover Admin	
datafax_atk	2022-12-04			ATK test account	
demo	2026-03-18			Demo Account	DFnet
demo_user1	2025-05-04			Demo User	DF/Net Software ULC

Username: demo Status: Active New Password: []

User Profile Preferences Permissions **ePRO Admin Permissions** History

ePRO Admin Permissions for the specified studies

Study	Type	Sites
<input checked="" type="checkbox"/> 804 DFdiscover 2024 Demo	Viewer	903-905
<input checked="" type="checkbox"/> 804 DFdiscover 2024 Demo	Monitor	901
<input checked="" type="checkbox"/> 804 DFdiscover 2024 Demo	Admin	902

User Database Encryption



- **All user records are now encrypted at rest**
- Ensures no access to personally identifying information (PII) such as name and email address without an authorized account
- User records are decrypted when using:
 - DFadmin, DFexplore, DFweb, DFws API
 - DFuserperms, DFuserdb -export
- Reading DFuserdb.log directly will display encrypted user records
- User records are not encrypted immediately after the upgrade, but encrypted next time they are modified and saved to the server



DFengage & ePRO Configurations

DFengage ePRO Configurations

Important steps for system administrators:

1. Define DFengage web FQDN in **DFedcservice.cf**
2. Customize email templates in **DFmsgtemplates** file
3. Customize ePRO registration in **DFsetup**
4. Create **dfeproagent** user account in DFadmin

Review these configurations carefully before using DFweb's **ePRO Management** page or sending email reminders via **DFeproreminders** script

1. Define DFengage web FQDN

- Fully qualified domain name (FQDN) is required for **DFweb** and **DFeproreminders** to create invite and login links for study participants
- Defined in **DFedcservice.cf** using *dfengagefqdn* parameter
- Example: dfengagefqdn dfengage.dfdiscover.com

2. Customize email templates

- Define custom email templates for your study
 - If not defined, default template is used
 - Templates are defined per study (not per site)
- Customization options for email templates:
 - Define subject and message with placeholders: name, username, invite & login links, study
 - Multi-language support using the “lang” parameter
 - Include a reply-to address using the “replyTo” parameter
- Create **DFmsgtemplates** file in study lib directory
 - JSON object with arrays for each template type
 - See [Programmer Guide](#) for details
- DFsetup interface will be added in future release

```
1 {
2   "invites": [
3     {
4       "message": "You've been invited to participate in
5         {{STUDY_NAME}}.\n\n<a href=\"{{INVITE_LINK_WEB}}\">Click here
6         to activate your account</a>\n0r paste this link into your web
7         browser: {{INVITE_LINK_WEB}}",
8       "subject": "{{STUDY_NAME}} Invitation to DFengage",
9       "lang": "English"
10    },
11    {
12      "message": "Vous avez été invité à participer à {{STUDY_NAME}}
13        en français.\n\n<a href=\"{{INVITE_LINK_WEB}}\">Cliquez ici
14        pour activer votre compte</a>\n0u collez ce lien dans votre
15        navigateur : {{INVITE_LINK_WEB}}",
16      "subject": "{{STUDY_NAME}} Invitation à DFengage",
17      "lang": "French"
18    }
19  ],
20  "logins": [
21    {
22      "message": "You have activities to complete for {{STUDY_NAME}}.
23        \n\n<a href=\"{{LOGIN_LINK_WEB}}\">Click here to login</a>\n0r
24        paste this link into your web browser: {{LOGIN_LINK_WEB}}",
25      "subject": "Complete your activities for {{STUDY_NAME}}",
26      "lang": "English"
27    },
28    {
29      "message": "Vous avez des activités à réaliser pour
30        {{STUDY_NAME}}.\n\n<a href=\"{{LOGIN_LINK_WEB}}\">Cliquez ici
31        pour vous connecter</a>\n0u collez ce lien dans votre
32        navigateur : {{LOGIN_LINK_WEB}}",
33      "subject": "Complétez vos activités pour {{STUDY_NAME}}",
34      "lang": "French"
35    }
36  ],
37  "newActivities": [
38    {
39      "message": "You have a new activity to complete for
```

Example DFmsgtemplates with English and French templates



3. Customize ePRO registration

- Customize ePRO registration to align with study
- In **DFsetup** under Study > Global Settings > ePRO
- Available options:
 - **Name** and **Email** recommended (at least one is required for registration)
 - **Phone** for reference purposes only
 - **Time Zone** defaults to DFweb user's time zone
 - **Language** used for sending invite, login, and reminder emails; requires translated email templates to be configured
 - Verification checks
 - **Send invitation:** always, never, on demand

DFsetup - Global Settings

Global Help Levels Fields Guides Custom ePRO

ePRO registration settings

Select which fields to include on the registration page:

- Name
- Email
- Phone
- Time Zone
- Language
- Verify identity check
- Verify consent & eligibility check

Send invitation:

DFsetup

ePRO Subject Registration - Subject 10003

Provide the subject's details and confirm their subject ID to complete the registration.

Name

Email

Confirm Subject ID

Send invite via email

[Preview invite](#)

- I verify the name and contact information above is correct and belongs to the specified participant
- I verify the participant has provided informed consent and is eligible to participate.

DFweb



4. Create dfeproagent user account

- A special user account **dfeproagent** is required to:
 - Identify ePRO status in DFweb
 - Calculate visit scheduling for email activity reminders sent via DFeproreminders
- **dfeproagent** account requires:
 - Access to all sites and subjects in each ePRO study
 - Role = same database permissions as ePRO participants + **DFweb**
 - Use ePROdata or create a separate role
 - Password set and not expired
 - Password registered with DFpass utility
 - Assign a role other than ePROdata to keep user profile visible in DFadmin

The screenshot shows the user management interface for the 'dfeproagent' user. The 'Username' field is highlighted with an orange box and contains 'dfeproagent'. The 'Status' is 'Active'. The 'New Password' field is empty. The 'Permissions' tab is selected, showing a table of study roles.

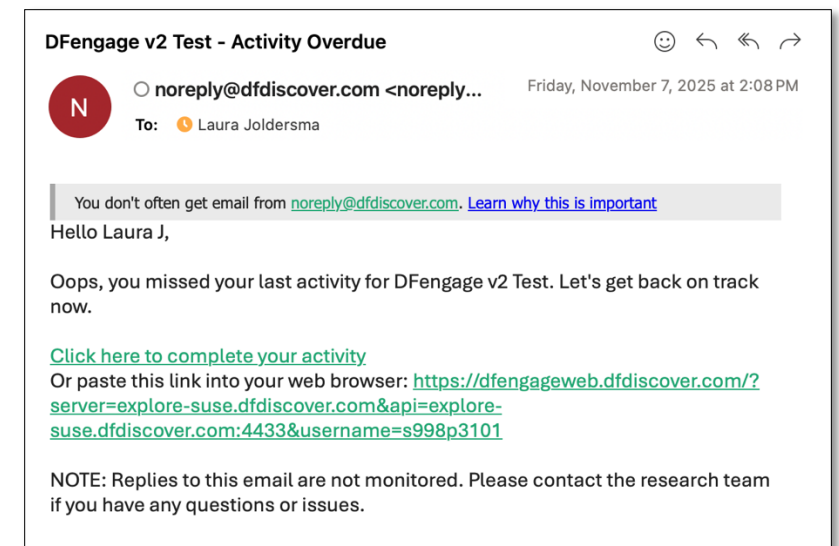
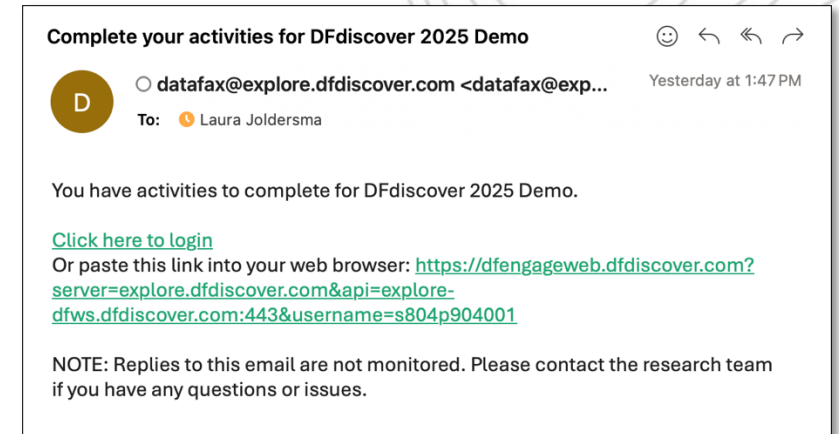
Study	Sites	Subject	Role Name
<input checked="" type="checkbox"/> 20 DFdiscover Solutions	ALL	ALL	ePROdata
<input checked="" type="checkbox"/> 254 Acceptance Test Study	ALL	ALL	ePROdata
<input checked="" type="checkbox"/> 804 DFdiscover 2025 Demo	ALL	ALL	ePROdata
<input checked="" type="checkbox"/> 822 Altech Spaces Sandbox	ALL	ALL	ePROagent
<input checked="" type="checkbox"/> 997 DFengage V2	ALL	ALL	ePROdata
<input checked="" type="checkbox"/> 998 Study_AppleStore_GooglePlay_Reviewers	ALL	ALL	admin
<input checked="" type="checkbox"/>			



ePRO Email Reminders

Participant Reminders via Email

- DFengage web users receive new & overdue reminders **via email** as scheduled by a system administrator
 - Alternative to the push notifications received on device by DFengage mobile users
- Key differences from DFengage mobile app:
 - Sent as emails, not push notifications on device
 - Sent by **DFeproreminders** as scheduled by administrator on DFdiscover server, not scheduled locally on the participant's device
 - Sent based on server time zone, not participant's local time zone
 - Includes login links to DFengage web (password required)



Sending Email Reminders to Participants

- DFengage details must be configured first, per previous section
- Steps performed by **DFeproreminders** script:
 - Runs **DFeproschedule** as user dfeproagent to:
 - Obtain updated ePRO visit schedule
 - Create output file of due/overdue activities and email address
 - Generates emails based on the **DFmsgtemplates** configuration
 - Sends emails to defined email addresses
 - Generates log of emails sent
 - Optionally, generates emails from an input file instead of running DFeproschedule
- See Programmer Guide [DFeproschedule](#) and [DFeproreminders](#) for more details

Reminder Comparison for Web & Mobile

WEB

- Received via email to participant's registered email address
- Contains a link to DFengage web which pre-fills the server, API, and username and requires the user to enter their password to log in
- Sent when triggered by the **DFeproreminders** script (e.g., scheduled via cron job) in the server's time zone

MOBILE

- Received as a push notification on the participant's device
- Displays a standard reminder which opens DFengage and requires the user to enter their PIN to log in
- Scheduled in advance in the participant's local time zone each time the participant logs in, supporting offline notifications



EDC Enhancements

DFexplore, DFweb, & DFcollect Updates



Increased Question Text Limits on eCRFs

- Increased character limits for field prompts & table cells from 256 to 1500 (including any HTML code used for formatting)
- Allows for longer question text on eCRFs, with or without tables
- Supported in DFexplore and DFweb
- DFcollect known issue:
 - Multi-line prompts up to 1500 characters supported for choice, check, VAS type fields only
 - Field prompts are restricted to a single line for string, date, time, and number type fields

▼ Inclusion Criteria			
Inclusion Criteria		Yes	No
Inclusion #1	Age 18 to 75 years, inclusive, at the time of informed consent	<input type="radio"/>	<input type="radio"/>
Inclusion #2	Confirmed diagnosis of Type 2 Diabetes Mellitus (T2DM) for at least 12 months prior to screening, based on medical history and clinical records.	<input type="radio"/>	<input type="radio"/>
Inclusion #3	HbA1c between 7.0% and 10.5% at screening, measured using a certified laboratory method.	<input type="radio"/>	<input type="radio"/>
Inclusion #4	Body Mass Index (BMI) between 25 and 40 kg/m ² , inclusive.	<input type="radio"/>	<input type="radio"/>
Inclusion #5	Stable dose of metformin monotherapy for at least 12 weeks prior to screening. No changes to dosing or addition of other antihyperglycemic agents during this period.	<input type="radio"/>	<input type="radio"/>
Inclusion #6	Participant must demonstrate the ability and willingness to comply with all study procedures, including attending scheduled clinic visits, completing study-related questionnaires, undergoing laboratory assessments, and adhering to study medication requirements for the entire duration of the trial (anticipated to be approximately 1 year). In addition, the participant must have reliable access to a telephone or electronic communication device for follow-up contact and must be able to understand and communicate in English to ensure accurate data collection and informed participation.	<input type="radio"/>	<input type="radio"/>



Repeating Visits in Subject Binder (1/2)

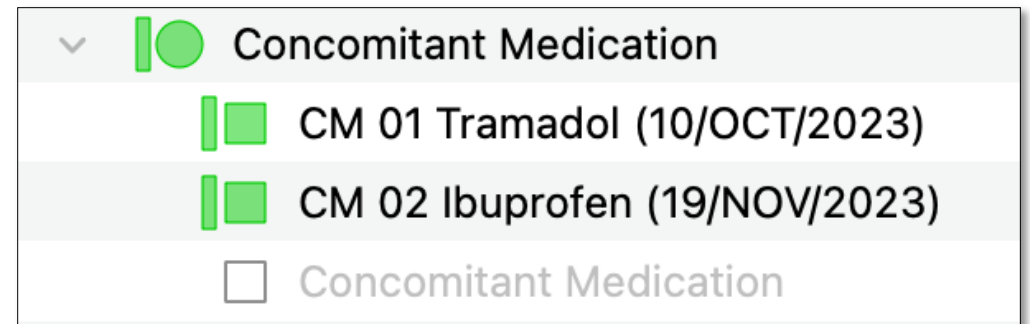
- Simplify subject binder navigation
- New visit map setting for repeating visits that use a visit number range
- Group all pages for the repeating visit into a single folder in the subject binder, rather than one folder per visit
- Optionally display key data points in page label, making specific AEs, con meds, or med hx easier to find
- Supported in **DFexplore only** in this release
 - To be added to DFweb and DFcollect in a future release



Adverse Event

- AE 01 04/OCT/2023 TIA
- AE 02 19/NOV/2023 Headache
- AE 03 03/JAN/2024 Bruise

Adverse Event



Concomitant Medication

- CM 01 Tramadol (10/OCT/2023)
- CM 02 Ibuprofen (19/NOV/2023)

Concomitant Medication



Repeating Visits in Subject Binder (2/2)

Current binder display

- Adverse Event 01
 - AE 01 TIA (04/OCT/2023)
- Adverse Event 02
 - AE 02 Headache (19/NOV/2023)
- Adverse Event 03
 - AE 03 Bruise (03/JAN/2024)
- Adverse Event 04

Updated binder display

- Adverse Event
 - AE 01 TIA (04/OCT/2023)
 - AE 02 Headache (19/NOV/2023)
 - AE 03 Bruise (03/JAN/2024)
- Adverse Event

Enabled via new visit map property in **DFsetup**

Visit or Cycle Definition

Type

Visit Cycle

O: Optional

Combine visit range into one folder in subject binder

Visit Date Field

(none)

Visit Scheduling

Visit is due 0 days after baseline

Visit is overdue when 0 days late

Plates

Required 30

Optional

Display Order

Missed Visit

*DFexplore only in 5.10
Coming soon to DFweb and DFcollect*



Encryption at Rest for Sensitive Data

- Specific data fields can be encrypted at rest using the new 'Encrypted' field property
 - SSN, phone, DOB, medical conditions, etc.
 - Available for string, number, and date fields
 - Not available for choice, check, VAS, time fields
- Field values are encrypted before saving to database & decrypted when read or exported using DFdiscover apps
- Maximum of 250 characters allowed for encrypted fields
 - Data records with encrypted values require more storage
- Same strong encryption algorithm as SSL (AES 256)

The screenshot shows the 'Field Properties' dialog box with the following details:

- Title:** Field Properties
- Style:** SimpleNumber
- Type:** Number
- Name:** AGE
- Alias:** AGE
- Description:** Age (years)
- Prompt:** (empty)
- Tabs:** Basic, **Detail**, Edit checks, Custom
- Display:** 2
- Store:** 2
- Format:** nn
- Units:**
- Encrypted:** (Dropdown menu open showing 'No' selected and 'Yes' as an option)
- Labels:** Label, Sub Label



DFweb Field Navigation Taskbar (1/2)

- Previous/Next buttons available on bottom right of CRF to navigate across fields
- Useful for studies with skip logic or dynamic field visibility on touch screens
- Selects the next available field, instead of having to tap manually
- Does not move between pages, only fields on the current page

Study 804 / Site 901 / Subject 901003 / 0 : Enrollment / 6 : Physical Exam

>> 6: Physical Exam Save ...

* Was the physical exam performed?
 Yes No
[Reset](#)

Date of Physical Exam:
DD/MMM/YYYY

Time of Physical Exam:
hh:mm 24-hour

* HEENT
 Not Done Normal Abnormal
[Reset](#)

If Abnormal, please specify:

Clinically Significant
 Yes No
[Reset](#)

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DFsetup - Global Settings

Global Help Fields Levels Guides Custom ePRO

Study launched in the year 2019
Reason for Data Change
Reasons for data change are required always
Level 1 Only if changing a non-blank value

DFExplore - Data View
Show next 5 New Subject binders
 Enable New Subject creation

DFExplore
 Run Edit checks in View mode

Multiple Queries
 Allow Multiple Queries per field

When exporting module data, subject headers use
 DFPID Subject field name on plate

When exporting sub label, output no choice code label as
 Setup defined label Blank

eCRF
 Show red asterisk for required and essential fields

Navigation
 Display field navigation taskbar

Apply Cancel OK

Enabled in **DFsetup** via Global setting 'Display field navigation taskbar' for tablet/phone sized screens



DFweb Field Navigation Taskbar (2/2)

- New setting to show field navigation taskbar on desktop as well as tablet/phone sized screens
- Only available when the 'Field navigation taskbar' setting is enabled in DFsetup Global Settings

Hemoglobin	nn.nn	g/dL	<input type="radio"/> Normal <input type="radio"/> Abnormal	<input type="radio"/> CS <input type="radio"/> NCS	<input type="radio"/> Yes <input type="radio"/> No	nn
Mean Corpuscular Hemoglobin (MCH)	20.00	pg	<input type="radio"/> Normal <input type="radio"/> Abnormal	<input type="radio"/> CS <input type="radio"/> NCS	<input type="radio"/> Yes <input type="radio"/> No	nn
Mean Corpuscular Hemoglobin Concentration (MCHC)	nn.nn	g/dL	<input type="radio"/> Normal <input type="radio"/> Abnormal	<input type="radio"/> CS <input type="radio"/> NCS	<input type="radio"/> Yes <input type="radio"/> No	nn
Hematocrit	nn.nn	%	<input type="radio"/> Normal <input type="radio"/> Abnormal	<input type="radio"/> CS <input type="radio"/> NCS	<input type="radio"/> Yes <input type="radio"/> No	nn
Mean Corpuscular Volume (MCV)	nn.nn	fL	<input type="radio"/> Normal <input type="radio"/> Abnormal	<input type="radio"/> CS <input type="radio"/> NCS	<input type="radio"/> Yes <input type="radio"/> No	nn
Red Blood Count (RBC)	nn.nn	million/uL	<input type="radio"/> Normal <input type="radio"/> Abnormal	<input type="radio"/> CS <input type="radio"/> NCS	<input type="radio"/> Yes <input type="radio"/> No	nn

[< Previous](#) [Next >](#)

Settings

General About

Open last study on login

Use Subject Alias

Use HD Image

Auto-Download Documents

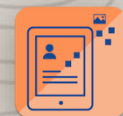
Load Subject Statistics

Auto-Load All Sites Dashboard

Show field navigation taskbar on desktop

Auto logout timer (min) **10** 20 30 45 60

All timestamps are shown in UTC-05:00 (server time). Your local time zone is UTC-05:00.



DFcollect Field Navigation Taskbar

- Previous/Next buttons available on bottom right of CRF to navigate across fields on touch screens
- Useful for studies with skip logic or dynamic field visibility
- Selects the next available field, instead of having to tap manually
- Does not move between CRF pages, only fields and screens on the current page

10 : Subject Encounter

Study 804 / Site 901 / Subject 901003 / 10 : Day 1 CLINIC / 10 : Subject Encounter

*Visit Date
DD/MM/YYYY

*1. Did Subject Attend Study Visit?

Yes No

If No, specify reason:

2. Were any Adverse Events Reported at this Visit?

Yes No

AE PG1
nn

AE PG2
nn

AE PG3
nn

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DFsetup - Global Settings

Global Help Fields Levels Guides Custom ePRO

Study launched in the year 2019

Reason for Data Change

Reasons for data change are required always

Level 1 Only if changing a non-blank value

DFexplore - Data View

Show next 5 New Subject binders

Enable New Subject creation

DFexplore

Run Edit checks in View mode

Multiple Queries

Allow Multiple Queries per field

When exporting module data, subject headers use

DFPID Subject field name on plate

When exporting sub label, output no choice code label as

Setup defined label Blank

eCRF

Show red asterisk for required and essential fields

Navigation

Display field navigation taskbar

Apply Cancel OK

Enabled in **DFsetup** via Global setting 'Display field navigation taskbar'



DFweb Role Permission Updates

- Important updates made to DFweb role permission requirements to align access across EDC tools
- The following **DFexplore** permissions now apply to **DFweb**:
 - DFexplore Views - Dashboard: Allows access to Dashboard page
 - DFexplore Views - Data: Allows access to Subjects page, CRF view, and Tasks page
 - DFexplore Views - Queries: Allows access to Queries page
 - DFexplore Views - Reports: Allows access to Reports page
 - DFexplore Print/Save - Images: Allows document download in Manage Documents dialog in CRF view
 - DFexplore Print/Save - Reports: Allows reports download in Reports view

Ensure role permissions are updated before upgrading to version 5.10



DFcollect Role Permission Updates

- Important updates made to DFcollect role permission requirements to align access across EDC tools
- The following **DFexplore** permissions now apply to **DFcollect**:
 - DFexplore Views - Dashboard: Allows access to Dashboard page
 - DFexplore Views - Data: Allows access to Subjects page, CRF view, tasks
 - DFexplore Views - Queries: Allows access to Queries view
 - DFexplore Print/Save - Images: Allows document download in Manage Documents dialog in CRF view

Ensure role permissions are updated before upgrading to version 5.10



Import Setup Enhancements



DFsetup: Import Setup Enhancements

- **Streamlined setup imports** from Excel, JSON, or another study
- **Interactive conflict resolution** for controlled merging of setup changes
- **Visual indicators** for added or retained fields
- **Improved usability and transparency** when importing into existing studies
- **Supports changes** to existing styles, modules, and fields (not yet changes to existing plates)

DFsetup - Difference Table

Resolve conflicts by choosing which value to keep. You can select values directly in the table, or use the checkboxes to keep all Current or all Import values.

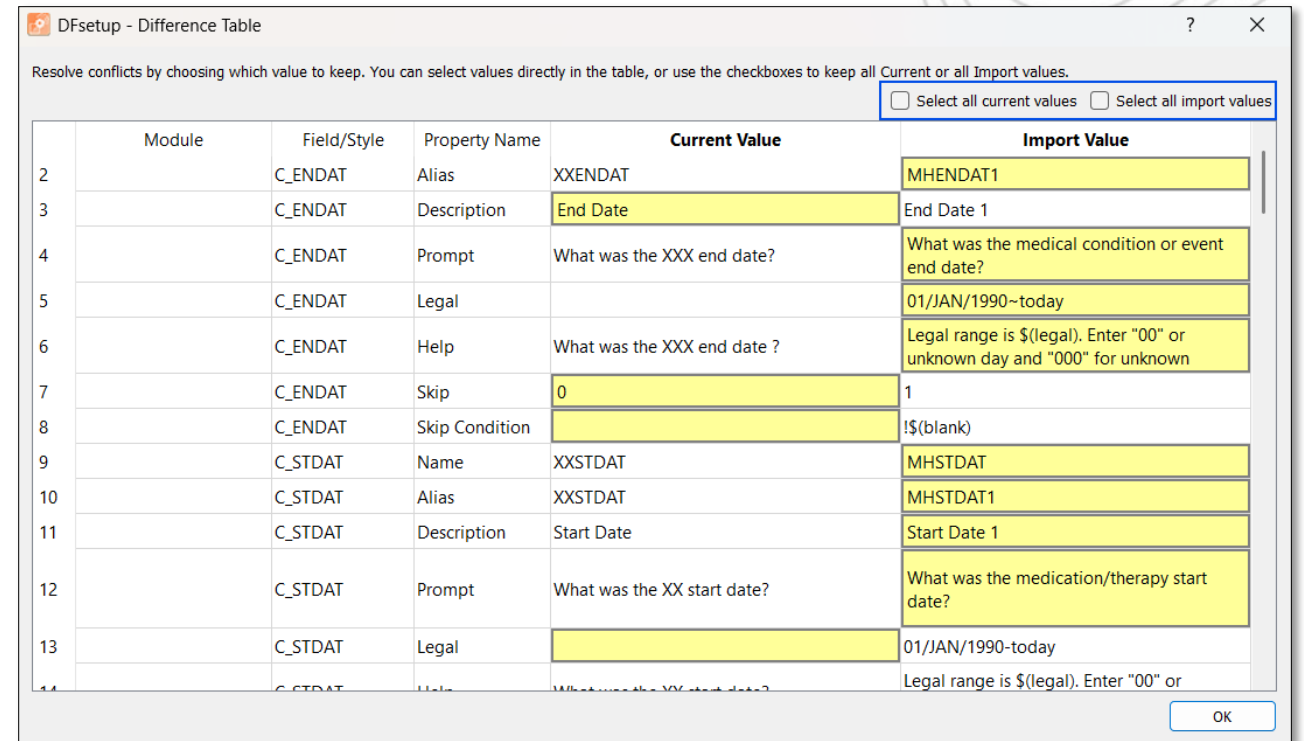
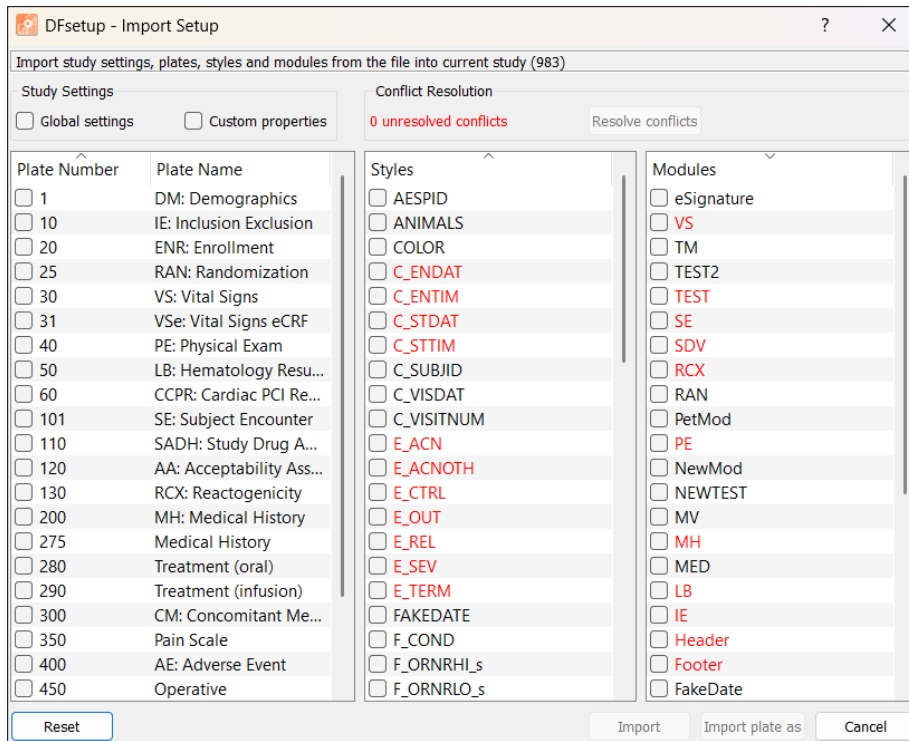
Select all current values Select all import values

	Module	Field/Style	Property Name	Current Value	Import Value
1	eSignature	SigLTimestamp			{ADD FIELD}
2	eSignature	SigReason			{ADD FIELD}
3	Header		Description		Header Module
4	Header	SCRNID			{ADD FIELD}
5	Header	VISITNUM	Alias	VISITNUM_\$(plate)	VISITNUM
6	Header	VISITNUM	Description	Visit Code	Visit Number
7	Header	VISITNUM	Prompt		Visit Number
8	Header	VISITNUM	Store	4	5
9	Header	VISITNUM	Format	nnnn	
10	Header	VISIT	Style	SimpleString	CDASHIG_String
11	Header	VISTYPE			{KEEP FIELD}
12	Header	SID			{ADD FIELD}
13	Header	SITEID			{ADD FIELD}
14	Footer		Description		Footer Module
15	Footer	VERNUM			{ADD FIELD}
16	Footer	INVRTIM			{KEEP FIELD}
17	Footer	VNDAT			{KEEP FIELD}

OK



Conflict Resolution & Difference Table



Number of conflicts shown in Import Setup dialog
Click **Resolve conflicts** to view difference table

Difference table shows all style/module/field conflicts
Select cells to **keep current value** or **replace with import value**



Server Configuration & Administration Updates

DFdiscover 5.10 Notes for System Administrators

DFweb & DFcollect Changes

- Role permissions changes for **DFweb** & **DFcollect**. [See details](#)
- **IMPORTANT:** All **DFcollect** users must upgrade to DFcollect 5.10 in order to connect to DFdiscover 5.10. [See details](#)
- Security updates for **DFweb**
 - Define CDNs allowed to provide HTML content. [See details](#)
 - Enable input validation for protection against XSS attacks. [See details](#)

ePRO Related Changes

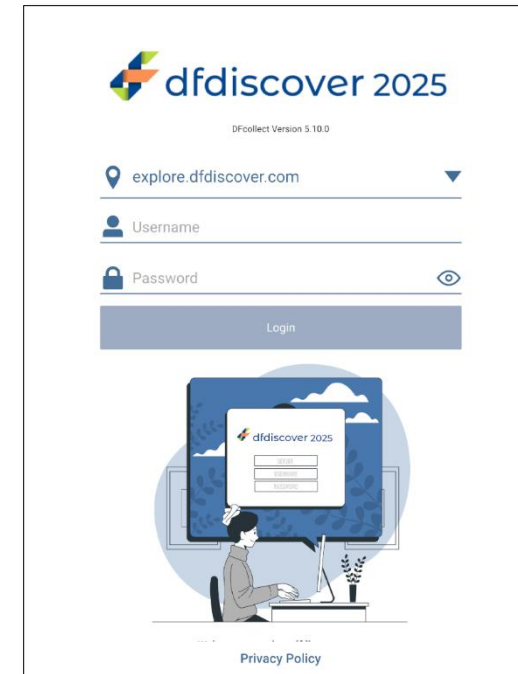
- Configure **DFedcservice** to support new ePRO features. [See details](#)
- A special system user **dfeproagent** is required for studies using DFengage. [See details](#)
- Assign ePRO Admin Permissions to users for ePRO Management access. [See details](#)

Extra Upgrade Steps

- Run **DFadmindb** utility to update DFadmin history database (ePRO updates)
- Run **DFsetupdb** utility to update DFsetup history database (timestamp bug fix)

DFws API Security Update to TLS 1.3

- All API connections are now required to use TLS v1.3 or later
- DFcollect 5.9 will not be able to connect to DFdiscover using API version 5.10 or later
- **IMPORTANT:** Ensure all DFcollect users upgrade to 5.10 when the server & API are upgraded to 5.10
- Users on DFcollect 5.9 will receive an error when attempting to connect to 5.10



DFcollect must be upgraded to 5.10
to connect to
DFdiscover server
and API version
5.10



Restrict Individual User Login to SSO

- New **SSO Only** option in user profile to require single sign on for that user
- Requires login with Microsoft for that user only
- Allows organizations to restrict access to those with valid Entra ID only (e.g., for internal staff) while also allowing standard user login without Entra ID (e.g., for site staff and study participants)
- Not supported in DFcollect or DFengage

The screenshot shows a user profile management interface. At the top, there are fields for 'Username' (demo), 'Status' (Active), and 'New Password'. Below this are tabs for 'User Profile', 'Preferences', 'Permissions', 'ePRO Admin Permissions', and 'History'. The 'User Profile' tab is active, displaying the following information:

Full Name	Demo Account	
Affiliation	DFnet	
Address	4724 52nd Avenue South	
City	Seattle	
State	Washington	Postal Code 98118
Country	USA	
Telephone	1-206-322-5931	
Fax		
Email	dfdiscover.demo@gmail.com	

Below the form, there are two checkboxes: 'Two-factor authentication required' (unchecked) and 'SSO Only' (checked). A red warning message states: 'ATTENTION: The user won't be able to log in with the DFcollect mobile app.'

IMPORTANT: Users with 'SSO Only' enabled cannot log in to **DFcollect**

Restrict All Logins to SSO

- Option to configure the DFdiscover server to require login with Microsoft Azure Entra ID for all users
- Defined in **DFedcservice.cf** using *ssologinonly* parameter with a value of 1 (require Microsoft SSO for all users) or 0 (allow login with both Microsoft SSO and DFdiscover credentials)
- Example: `ssologinonly 1`
- **IMPORTANT:** DFcollect supports SSO online only. Do not restrict your server to SSO only if using DFcollect offline

Define CDN URLs allowed by DFweb server

- We have strengthened DFweb security by implementing Content Security Policy v2 (CSP) headers across all HTML content responses
 - This enhancement helps protect against cross-site scripting (XSS) vulnerabilities
- Define additional CDNs allowed to provide HTML content in the DFweb server's environment.json
- A new 'cspWhitelist' variable has been added to the DFweb server's environment.json with a default value of 'cdn.dfdiscover.com'
- This variable supports a space-delimited list of CDN or server URLs, allowing flexibility to define multiple CDNs or other URLs to be allow-listed



Additional Updates

DFweb Input Validation for Data Security

- Input validation and cleaning for all data entered in DFweb
- Users informed of any changes before saving data
- Enhances protection against cross-site scripting (XSS) attacks
- Optional per study
- Enabled in **DFadmin** with 'Input validation' option under study configuration

ⓘ Data adjusted for security compliance.

To protect system security and ensure data integrity, some characters or formatting in your entry were automatically cleaned.

Please review the updated value to confirm it still reflects the intended data.

OK

Warning shown in DFweb

Configuration in DFadmin

The screenshot shows the 'Configurations' tab in DFadmin. The 'Input Validation' checkbox is checked, indicating that protection against XSS attacks is enforced. Other configuration details include Study Number 228, Name 'Sandbox for Demo', and various directory paths.

Field	Value
Study Number	228
Name	Sandbox for Demo
Administrators	busi tinashe
Study Directory	/opt/studies/CAPRISA_Sandbox
Working Directory	\$(STUDY_DIR)/work
Pages Directory	\$(STUDY_DIR)/pages
Preset Printer	lp [Must exist on server]
Candidate Hosts	explore.dfdiscover.com
Minimum Free Disk	500000 KB
Study URL	
Allow Local Cache	<input type="checkbox"/>
Input Validation	<input checked="" type="checkbox"/> Enforce protection against XSS attacks
Version Strict	All minor versions supported



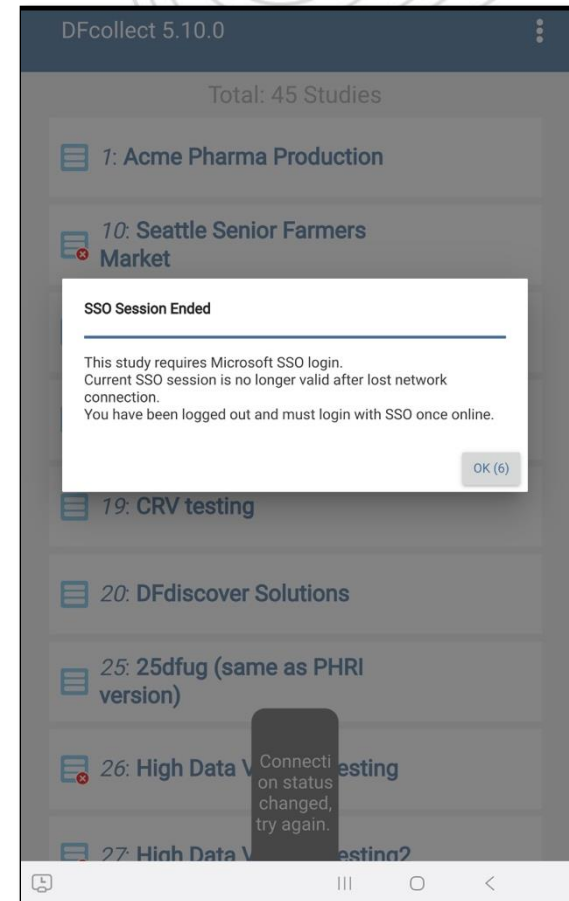
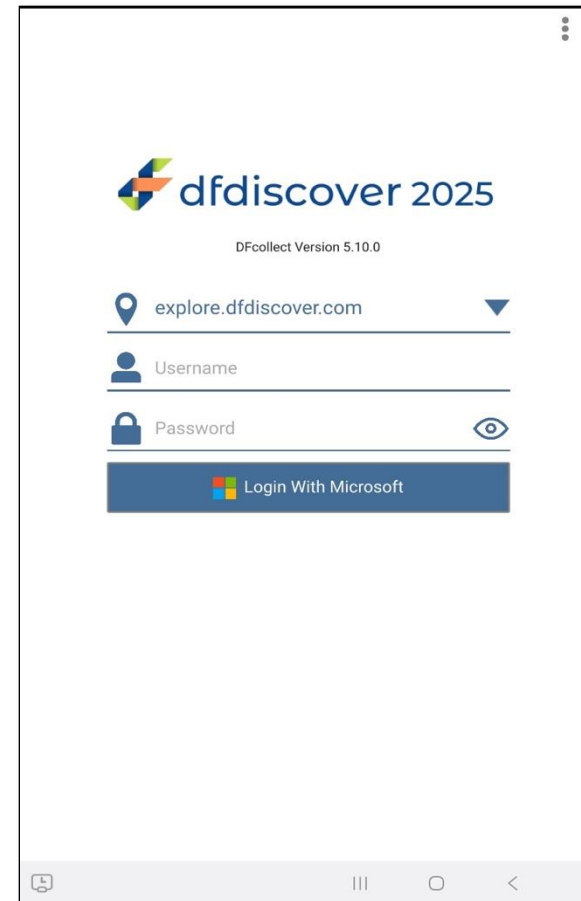
Additional DFweb Updates

- Multiple security improvements to strengthen protection from attacks
- Login page usability: username no longer cleared when navigating to different app or browser tab
- Scrolling improvements in CRF view when using keyboard for field navigation
- Various edit check fixes related to dfaccess, dflookup, dfdirection functions and DFSTATUS, DFRASTER fields
- Issues related to subject aliases have been corrected
- Additional updates, enhancements, and fixes: see [Release Notes](#) for full details



Login with Microsoft in DFcollect

- DFcollect supports Microsoft single sign-on (SSO) **under very limited conditions**
 1. Server-wide SSO-only login is enabled
 2. User is online
- SSO not otherwise supported in DFcollect, even with user-specific SSO-only login enabled
- SSO login prevents offline use of DFcollect
 - Active connection required to log in
 - If connection is lost, user is logged out
- Enabling server-wide SSO login is **not recommended** when using DFcollect





Additional DFcollect Updates

- DFcollect User Guide is now linked from the app menu (online only)
- Attach document interface updated on Android
- Fixes to dropdown choice fields, local timestamp 'Use' fields, special characters used in dfexecute() edit check function
- DFcollect now supports TLS 1.3 on iOS
- Various minor improvements and fixes: see [Release Notes](#) for full details

New Subject Schedule of Pages Report

- Lists requirement and status of all pages at all visits by subject
- Combines visit and plate need & status in a single view
- Useful for troubleshooting for complex visit schedules or ePRO timing
- Use filters to review specific sites, subjects, visits, or plates

Subject Schedule of Pages

Filters

Site: All

ids: 902004

Visits:

Plates: 22

Descending

Reset Run

Subject Schedule of Pages
DFdiscover 2025 Demo

2025-11-20 at 21:10:04 (UTC-05:00)

Search by Subject ID : Showing 7 Results

Subject ID	Visit ID	Visit Need	Visit Status	Plate ID	Plate Label	Plate Need	Plate Status	Plate Level
902004	11	Required	Visit Done	22	Diary Day 1	Required	Final	1
902004	12	Required	Visit Not Received And Overdue	22	Diary Day 2	Required		
902004	13	Required	Visit Not Received And Overdue	22	Diary Day 3	Required		
902004	14	Required	Visit Not Received And Overdue	22	Diary Day 4	Required		
902004	15	Required	Visit Not Received And Overdue	22	Diary Day 5	Required		
902004	16	Required	Visit Not Received And Overdue	22	Diary Day 6	Required		
902004	17	Required	Visit Not Received And Overdue	22	Diary Day 7	Required		

Options

Previous Next

DFdiscover Standard Reports

Tabular Listing Reports Updates

- **Number of results:** Tabular listings display the number of results currently shown
 - Number updates when applying search/filter
- **Optional pagination:** Apply pagination using `-limit` parameter
 - When downloading a paginated report to HTML, only the current page is included
 - Use Excel, CSV, or text to export the full listing
- Applies to both DFdiscover standard reports like History of Changes and Plate Listing as well as custom listings created in DFexplore's List View
- Only available in DFexplore; available in DFweb in a future release

The screenshot displays the DFdiscover 'Plate Listing' report interface. At the top, the report name is 'Plate Listing' and the options are '-limit <#> ...Limit the number of rows (default all rows)'. The 'Specify' field contains '-plate 1 -limit 500'. Below the search bar, there are buttons for 'Run', 'Explain', and 'Close Report'. The main content area shows a table with the following columns: DFSTATUS, DFVALID, DFRASTER, DFSTUDY, DFPLATE, VISITNUM, SUBJID, VISDAT, and REMOTEYN. The table contains 10 rows of data. A yellow box highlights the 'Showing 500 Results' indicator. At the bottom, a yellow box highlights the pagination information: 'Results 1-500 of 9438' and 'Page 1 of 19'.

DFSTATUS	DFVALID	DFRASTER	DFSTUDY	DFPLATE	VISITNUM	SUBJID	VISDAT	REMOTEYN
2	1	2540/000C001	20	1	001	0		1
1	3	2249R0007001	20	1	000	3000	2022-12-06	0
2	1	2234/000K001	20	1	001	3000	2022-08-23	0
2	1	2249R0007008	20	1	002	3000	2022-12-06	1
1	1	2325R0003011	20	1	003	3000	2023-06-19	2
1	1	2325R0003012	20	1	004	3000	2023-06-19	0
1	1	2325R0003013	20	1	005	3000	2023-06-19	0
1	1	2325R0003014	20	1	008	3000	2023-06-30	0
2	1	2325R0003015	20	1	041	3000	2023-07-05	0

Updated User Guide Access in Desktop Apps

- Selecting [Help](#) > [Topics](#) in any DFdiscover desktop app now opens user guide in web browser
- User guides include the following features:
 - **Navigation:** Use the left sidebar to navigate to different sections
 - **Search:** Use the search tool in the browser to find keywords (shortcut: Control/Command + F)
 - **Copy links:** Click the link icon in any heading to copy the link for sharing
 - **Download PDF:** Download a PDF copy for offline use at the bottom of the left sidebar
 - **Responsive design:** Adapts to smaller screen sizes

The image displays two screenshots of the DFdiscover user guides. The top screenshot shows the 'Custom Data Export' guide, which includes a sidebar with a list of topics and a main content area with a heading and a paragraph. The bottom screenshot shows the 'Adding Tables to eCRFs' guide, which includes a sidebar with a list of topics and a main content area with a heading, a paragraph, and a table configuration interface.

DFdiscover User Guide

- Introduction
- A Guided Tour
- Using DFExplore
- Dashboard View
- Data View
- Queries View
- Reasons
- Image View
- List View
- User Pr
- Navigat
- Workin
- Selecti
- Searchi
- Saving
- Exporti
- Custom

Custom Data Export

If you have permission to save data, one or more plates, modules, or custom list views can be written to a local file in Excel, csv, or text format by selecting **File** > **Custom Export**.

DFsetUp - Add/Edit Table...

Study Setup User Guide

- Using **DFsetUp** - An Overview
- Defining Data Fields
 - Preparation
 - Module and Field Definition
 - Special Field Uses
 - Data Encryption
 - Creating CRF Fields
 - Field Location
 - Creating New Fields by Copy & Paste
- Positioning and Aligning Data Fields
- Reordering Data Fields, Screens and Grouping
- Adding Tables to eCRFs
 - Creating and Editing a Table
 - Using the Add/Edit Table Dialog

Adding Tables to eCRFs

On eCRFs, fields can be displayed within a table instead of the default display of one field per row. Tables can include a custom number of rows and columns with custom table title, table header, and row and column headers.

Each cell in a table may contain a single data field or contain custom text (including basic HTML formatting), or remain blank. Additional customization can be applied to column width, column alignment, and background colors. For eCRF tables displayed in **DFweb**, you may customize whether the table appears on smaller screen sizes (tablets and smartphones) to ensure the best user experience.

Tables are supported in **DFExplore** and **DFweb**, but not supported in **DFCollect** at this time.

DFsetUp - Add/Edit Table...

Tables: NewTable3 4 + * -

Title: Blood Pressure

show row borders show column borders in data entry window

Fields from: 17 to 32 Horizontal Order color Per Field

Rows: 4 headers Per Field color Per Field

Columns: 4 headers Per Field color Per Field width Per Column alignment Per Column

Update Table Reset

Table Header	1	2	3	4
width 20 % left	width 15 % center	width 15 % center	width 22 % center	width 28 % left
	Systolic	Diastolic	Sitting/Standing	
1				



Version Mismatch Warning in DFsetup

- Newer versions of **DFsetup** often add new properties, definitions, etc. which older DFdiscover server versions do not support
- Helps avoid issues when using a newer version of **DFsetup** to connect to an older **DFdiscover server** version
- Solution: Use the correct DFsetup version for your DFdiscover server

The screenshot shows the DFsetup login page. At the top left is the DFsetup logo, and at the top right is the text "2025 Version 5.10.0". Below this is a section for "DFdiscover Server" with a dropdown menu showing "zaf.dfdiscover.com". There are input fields for "Username" and "Password". A "Forgot Password?" link is located below the password field. At the bottom, there are two buttons: "Login" and "Login with Microsoft". A red warning message is displayed at the bottom of the form:


The DFsetup version (5.10.0) is newer than the DFdiscover server version (5.9.3). Please check that you're using the correct DFsetup version before selecting a study.

Additional Updates

- Desktop applications now remember more than 5 previous servers on the login screen
- Printing multi-page eCRF plates to PDF pages is improved: each eCRF page is now printed to its own PDF page when creating bookmarked PDFs and subject packages
- Page label substitutions using field values are left blank rather than shown as “???”
- Study history in DFadmin has been updated to exclude study administrator access changes prior to the creation of the first role in the study
- More improvements and bug fixes: see [Release Notes](#) for full details

Known Issues & Advance Notices

- What are known issues?
 - Minor issues that exist in the current release
 - Includes workarounds where available
 - Where possible, these issues are planned to be addressed in a future release
- What are advance notices?
 - Changes planned for a future release that may impact ongoing projects
 - Includes features that will be deprecated
 - Allows you to prepare early for future updates
- See the [Release Notes](#) for full details

Known Issues 		
ID	App	Description
8557	DFsetup	In DFsetup, when pasting a table of data into the Edit Coding table for check, choice, and numeric fields, only code and label may be pasted, and sub label is ignored. As a workaround, type or paste individual sub labels into each field.
12095	DFsetup	If the set from an error message system character
10128	DFsetup	In DFset workaro import f
8970	DFsetup	In DFset Replace
10131	DFadmin	In DFadr administr
10432	DFweb	When an number warning warning

Advance Notices

This section provides information about changes planned in a future release that may impact ongoing projects, in particular any features that will be deprecated. These notices are intended to support planning for future upgrades.

- Internal Queries Behavior:** Internal queries permission implementation will be updated in a future release. The implementation of the Show Internal Queries "none" and "resolved" options in the DFadmin role permissions will be updated in DFexplore, DFweb, and DFcollect to ensure consistency across apps. The following behavior will be implemented:
 - If internal queries permission is "none" and the role includes full permissions to modify queries, internal queries are view only.

Current behavior: In DFexplore, internal queries are treated the same as external queries. In DFweb and DFcollect, internal queries are hidden.
 - If internal queries permission is "none" and the role includes partial or no permissions to modify queries, internal queries are hidden. Internal queries can be created or modified by an edit check with partial query permissions, but the queries will remain hidden.

No change from current behavior.
 - If internal queries permission is "resolved" and the role includes full permissions to modify queries, outstanding internal queries are view only; resolved and pending internal queries are treated the same as external queries.

Current behavior: In DFexplore, DFweb, and DFcollect, all internal queries are treated the same as external queries.
 - If internal queries permission is "resolved" and the role includes partial or no permissions to modify queries, outstanding internal queries are hidden; resolved and pending internal queries are treated the same as

Advance Notices of Future Changes

- **Internal Queries Behavior:** Internal queries permission implementation will be updated in a future release
- **Edit Checks in View Only Mode:** The behavior of edit checks on view-only data will be updated for consistency in a future release
- **Legacy Setup Formats:** Modular and legacy XML export options in DFsetup will be removed in a future release.
- **Protus Fax Support:** Protus functionality will be removed from DFadmin in a future release.
- See details in [Advance Notices](#)



Upgrade Process

Upgrade for DFnet-managed servers

Hosted and administered by DFnet

- DFdiscover upgrade to 5.10 & DFengage upgrade to 2.4 on **November 29, 2025**
- Backend upgrade process
 - Same day upgrade to DFdiscover server & API, DFweb, DFcollect, and DFengage
 - Study Administrators: verify **Version Strict** setting to ensure upgrade does not impact users not upgrading client apps immediately
- End user upgrade process
 - Install new desktop tools to use new version 5.10 features on or after **November 29, 2025**
 - On per-study basis, continue using older tools (check with your Clinical Data Manager or Account Manager if not sure)
 - DFcollect & DFengage: If auto-update is enabled, new version will be automatically updated, otherwise manual update is required
- Applies to **dfdiscover.com** servers: *hosted-1, zaf, hosted-eu, hosted-aus, hosted-cdn, dfweb, dfws*

Upgrade for self-managed servers

Self-hosted or cloud-hosted by DFnet

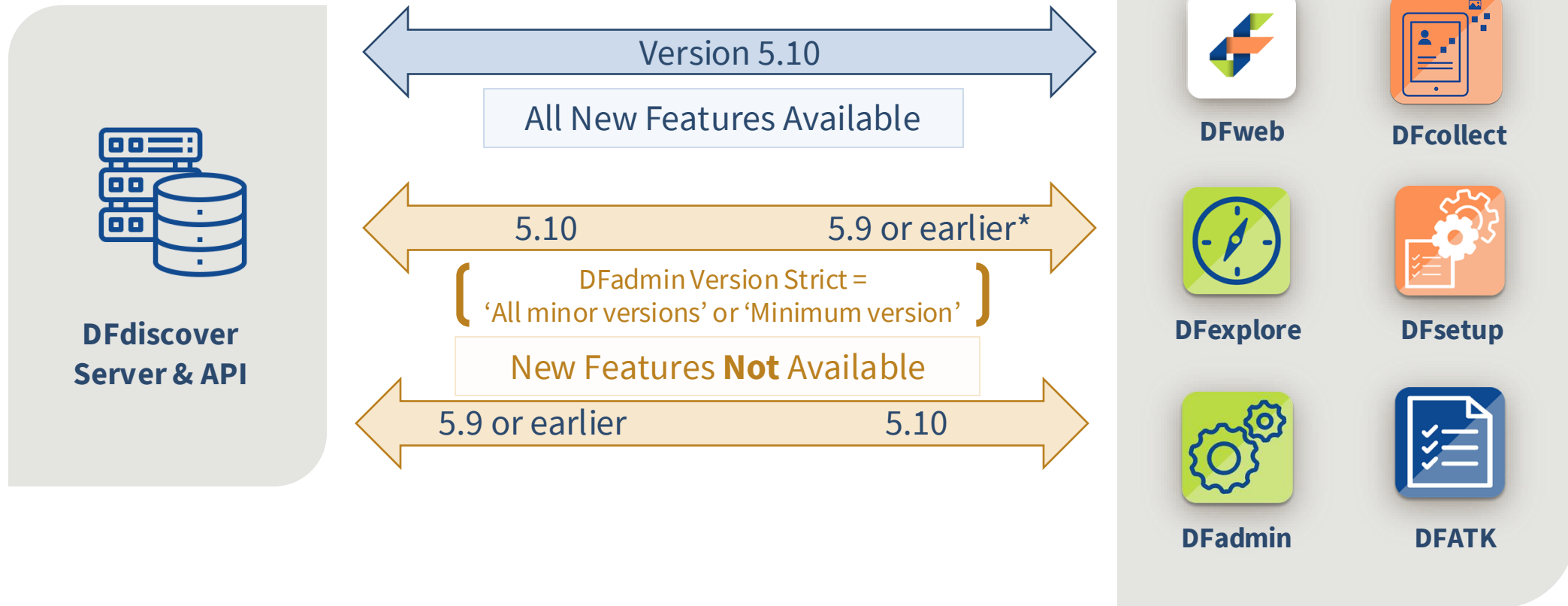
Backend upgrade (server & API)

- Organizations determine upgrade schedule and process
- Server and API installers and documentation available on website ([My Account > Software Releases](#)).
- Additional system administrator steps:
 - Run **DFsetupdb** to update DFsetup history database
 - Run **DFadmindb** to update DFadmin history database
 - Apply additional system configuration options as needed
- Study Administrators:
 - Verify **Version Strict** setting to match planned usage of client app versions
 - Verify **DFweb** and **DFcollect** role permissions to ensure continued access to intended features

Frontend upgrade (client apps)

- Desktop tools: End users install new version
 - Coordinate installation with end users based on organization/study requirements
 - End users may continue using older app versions based on **Version Strict** study/server settings
- DFweb: No end user action required
 - New version remains compatible with older servers based on **Version Strict** setting
- DFcollect & DFengage: Available in app stores on **November 29, 2025**
 - For existing users: If auto-update is enabled, new version will be automatically updated, otherwise manual update is required (unless using enterprise app store, where updates are controlled at enterprise level)
 - New version remains compatible with older servers based on **Version Strict** setting

Version Compatibility



* Version 5.1 desktop tools cannot connect to server version 5.8 or later

Compatibility: Version Strict Setting

- Use the **Version Strict** setting in DFadmin to restrict client tool versions that can connect to your DFdiscover server
- If older apps are used with newer server/API or newer apps used with older server/API, ensure Version Strict is ‘All minor versions supported’ or ‘Minimum version supported’
 - Minimum version supported = only apps of the specified version or newer can connect to the DFdiscover server
 - All minor versions supported = apps version 5.2 through 5.8 can connect to the DFdiscover server
 - **NOTE:** 5.1 desktop tools are not able to connect to 5.8 or later due to security requirements for TLS v1.3
- Define at master level or per study

The screenshot displays the DFadmin configuration interface. At the top, there are tabs for 'Configurations', 'Auto Logout', 'Permissions', and 'Watermark'. The 'Configurations' tab is active, showing various settings for a study. The 'Version Strict' setting is highlighted with a blue border and is set to 'Minimum version supported' with a dropdown menu showing '5.2 or newer'.

Configurations	Auto Logout	Permissions	Watermark
Study Number	20		
Name	DFdiscover Solutions		
Administrators	karolyn laura530 macdouc_test tinashe		
Study Directory	/opt/studies/20dfug		
Working Directory	\$(STUDY_DIR)/work		
Pages Directory	\$(STUDY_DIR)/pages		
Preset Printer	lp [Must exist on server]		
Candidate Hosts	explore.dfdiscover.com		
Minimum Free Disk	500000 KB		
Study URL			
Allow Local Cache	<input type="checkbox"/>		
Version Strict	Minimum version supported 5.2 or newer		



Thank you!