




DFengage 2.5 Training

ePRO with DFdiscover

Last updated: June 5, 2026

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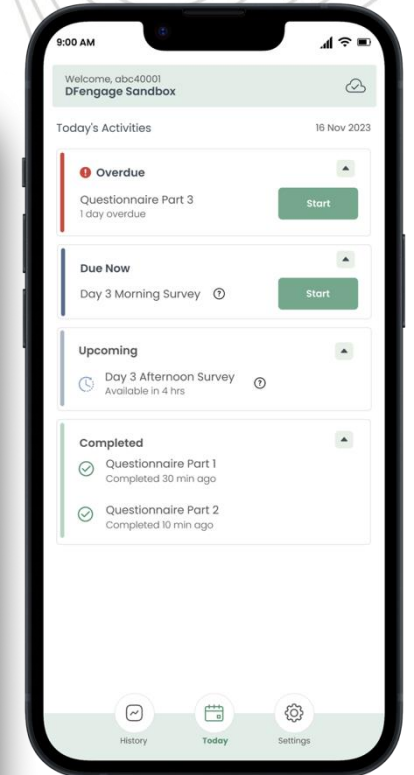
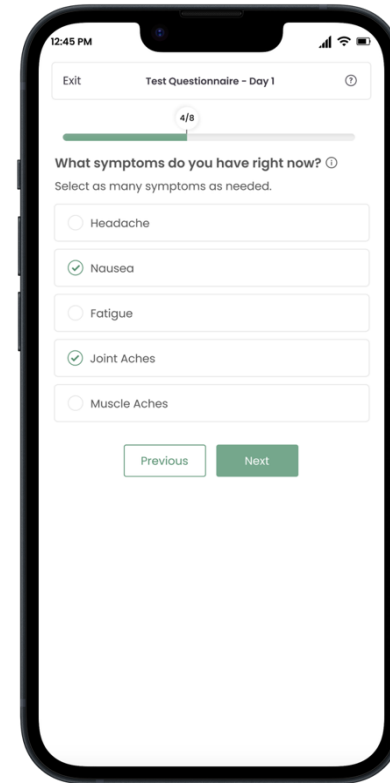


Introduction to DFengage

Enhance Participant Engagement with **DFengage ePRO**

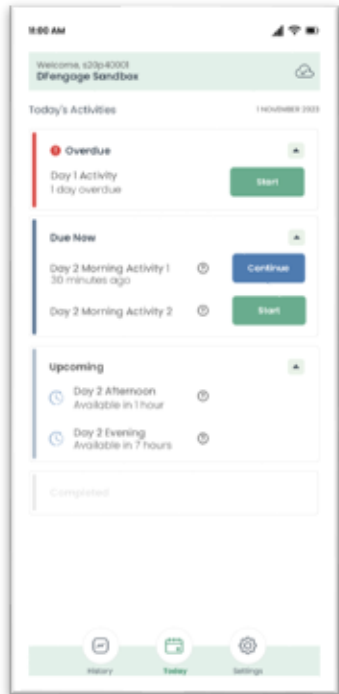


- ▶ Easy-to-use app for research participants
- ▶ Collect symptoms, daily outcomes, questionnaires, study diaries, surveys
- ▶ Participants enter data from any device
 - ▶ In their chosen language
 - ▶ From anywhere – online or offline
- ▶ Real-time study team access to completed data
- ▶ Reduce in-person and phone visits
- ▶ Available on the web & as a mobile app on Android and iOS
- ▶ Fully integrated with DFdiscover system

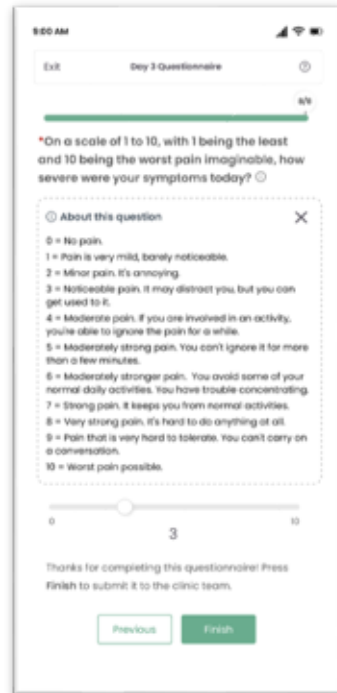




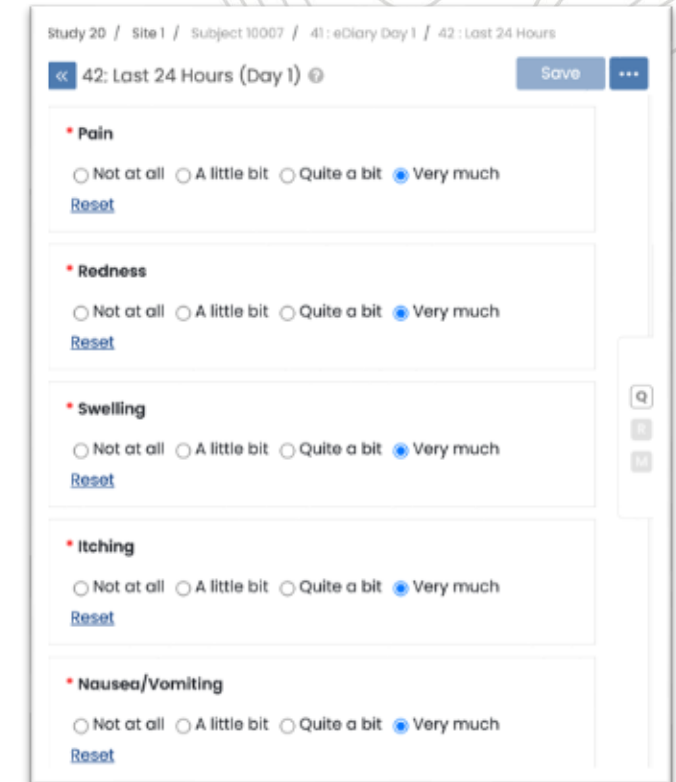
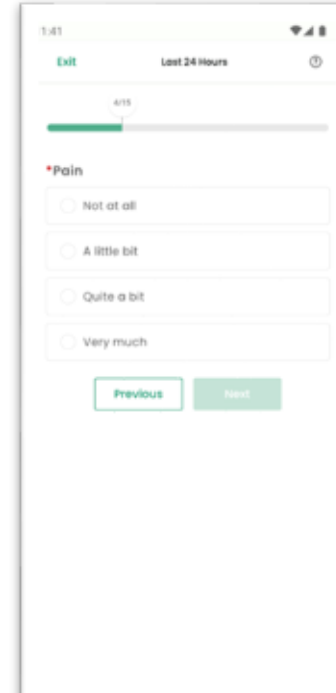
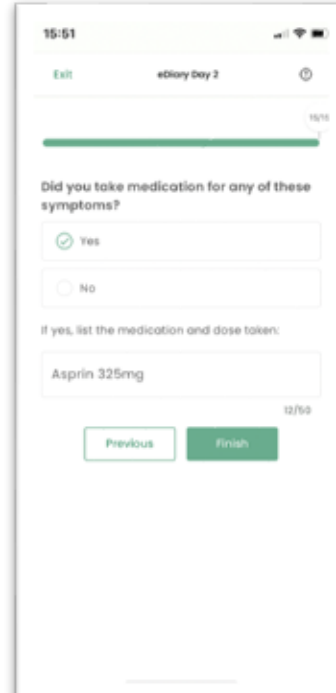
Capture ePRO data with DFengage



Study activities defined per protocol
Notification sent for new and overdue activities



One question per screen for ease of completion.
All data types supported. Help information may be defined.
Activities can be completed online or offline.



Data available in DFexplore / DFweb / DFcollect after syncing



DFengage: ePRO with DFdiscover

- ▶ **ePRO app** fully integrated with **DFdiscover** system and **EDC** apps
- ▶ Available as a **mobile app** (iOS/Android) and **on the web**
- ▶ Study participants complete activities defined by the research team
- ▶ **Instant access** to synced ePRO data in DFexplore, DFweb, DFcollect
- ▶ **Email and push notifications** for new and overdue activities
- ▶ **Offline support** for notifications and activities (mobile app only)
- ▶ Multi-language support
- ▶ One study database definition in DFdiscover
- ▶ Mid-study changes are synced when opening DFengage online



DFengage: Works Online and Offline

▶ Online

- ▶ When online, once user clicks “Finish,” data for that activity is sent to DFdiscover via API and removed from the app
- ▶ Any scheduling updates or mid-study changes are synced with DFengage

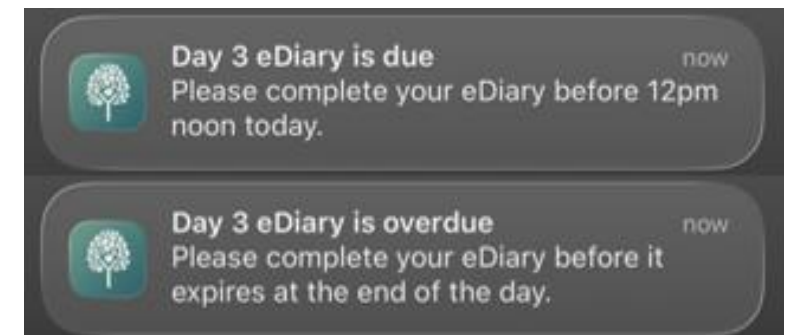
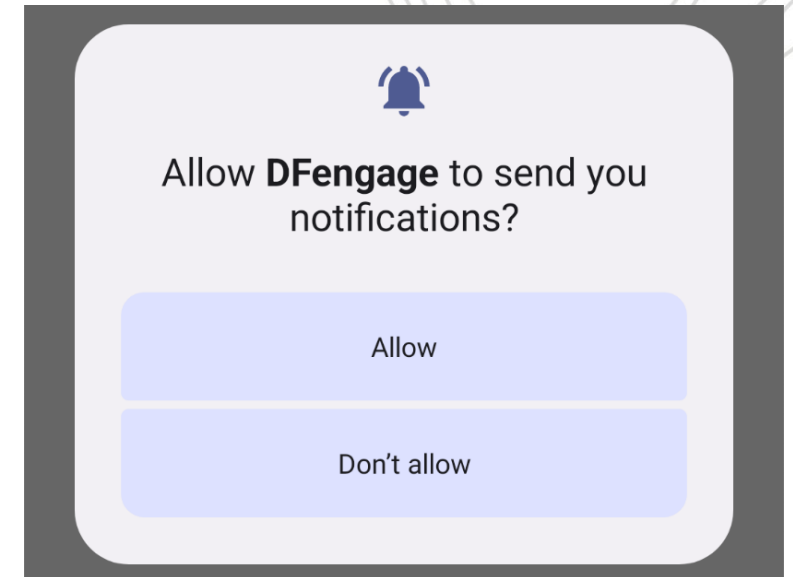
▶ Offline

- ▶ Setup and visit schedule information is stored in the app on device so that activities can be completed while offline
- ▶ Notifications are sent while offline according to schedule from last sync
- ▶ Once back online with app open and active, the data is synced with DFdiscover and removed from device



DFengage Mobile: Timing and Notifications

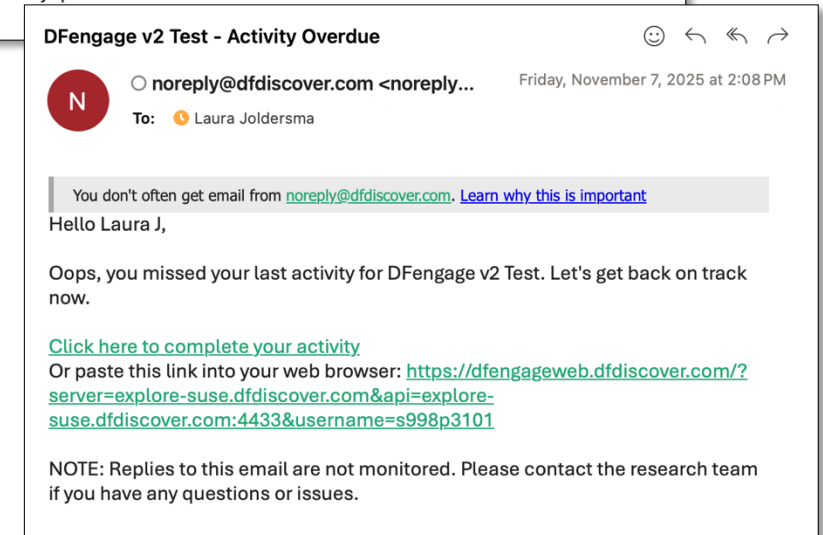
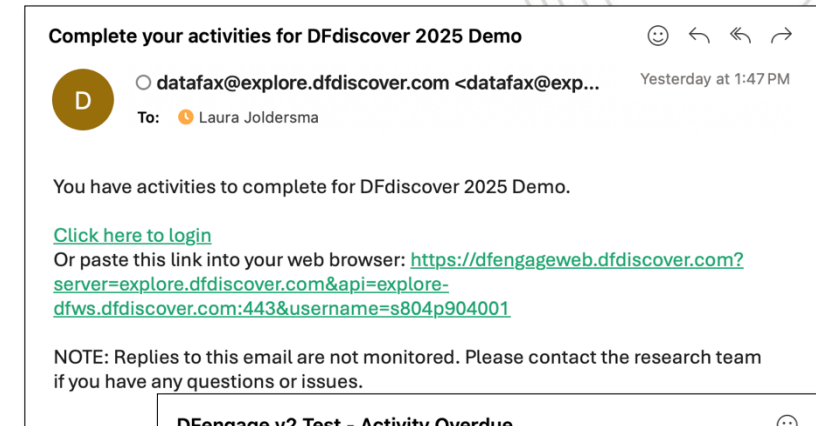
- ▶ Activities available based on participant visit schedule
 - ▶ Flexible notification timing options
 - ▶ Supports multiple notifications per visit
 - ▶ Generic or custom notification content
- ▶ By default, activities are available at 8:00am device time on their due date, but can be customized per visit
 - ▶ Custom visit timing supports multiple activities per day
- ▶ Timing is based on user's device time
- ▶ In case of time zone changes:
 - ▶ Notifications are sent according to the device's time zone when DFengage was last open
 - ▶ Will revert to new time zone moving forward once DFengage is open





DFengage Web: Timing and Notifications

- ▶ Activities available based on participant visit schedule
 - ▶ Same as mobile app
- ▶ **Activity notifications sent via email**
 - ▶ Reminders sent based on server time (not user's device time) and participant schedule
 - ▶ Subject must be registered with email address on DFweb ePRO management page
 - ▶ Reminder email text can be customized
 - ▶ No push notifications available in the web app
 - ▶ Login reminder emails can be sent by site on demand





DFengage: Security & Personal Data

Security

- ▶ Unique user account with username and password required for each participant
- ▶ No geolocation data stored in DFengage
- ▶ Only study responses are collected from participant
- ▶ Data encrypted locally on the device and in transit
- ▶ Data not retained on the device/browser
 - ▶ Mobile: No study data remains on the device after syncing
 - ▶ Web: No study data remains on the device after logging out







Personally Identifiable Information (PII)

- ▶ Database records identified by subject ID
- ▶ Audit trail tracked by username
- ▶ PII used to support account setup, forgot password, two-factor authentication, and email reminders
- ▶ PII stored securely in DFdiscover and only accessible to authorized personnel
 - ▶ User-based access to participant PII
 - ▶ User profile inaccessible to system and study admins
 - ▶ User profile data encrypted in transit and at rest



DFengage: ePRO User Accounts

- ▶ Unique username and password for each participant with generic usernames
- ▶ One-to-one correspondence between DFadmin user and study participant
- ▶ Study administrator creates unique ePRO user accounts in DFadmin
- ▶ Staff working directly with participants use **ePRO Management** tool in DFweb for registration

Username	Password Expiry	2FA Status	SSO Only	Full Name
 s804p901001	2025-11-16			
 s804p901002	2025-11-16			
 s804p901003	2025-11-16			
 s804p901004	2025-11-16			
 s804p901005				
 s804p901007	2024-05-13			

Username s20p10007 Status Active

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 Roles

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

Username s20p10007 Status Active

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

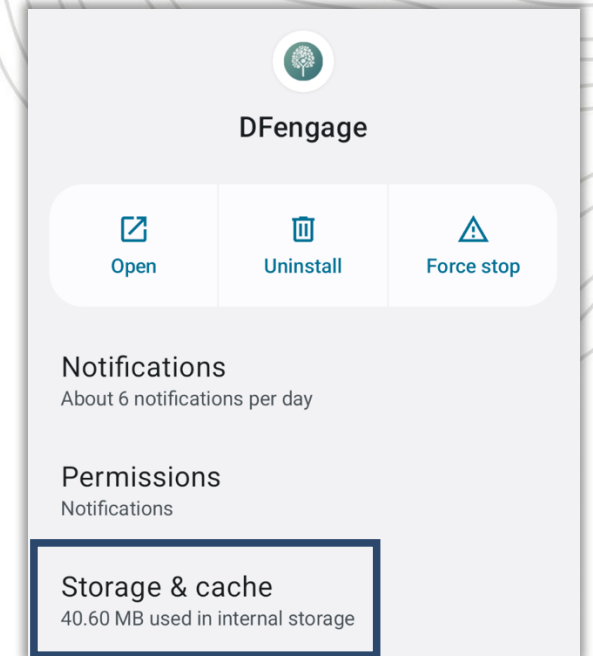
Two-factor authentication required

SSO Only

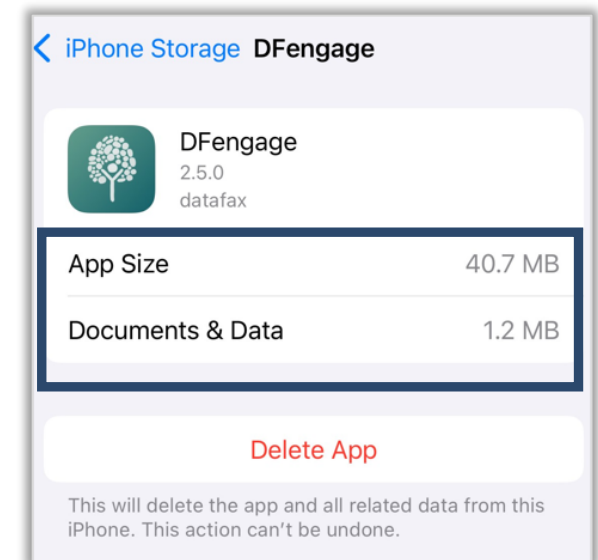
DFengage: Data Usage and Storage

- ▶ App does not consume data while swiped away or closed
- ▶ Data is consumed while participant is completing activities and when data is synced
- ▶ DFengage uses less storage space than commonly used apps
 - ▶ Social media, photos, and music take most space on phone or tablet
 - ▶ Larger studies will take up more storage

Android
(Pixel 4):
41 MB



iPhone:
45 MB





DFengage 2.5

What's New

MOBILE

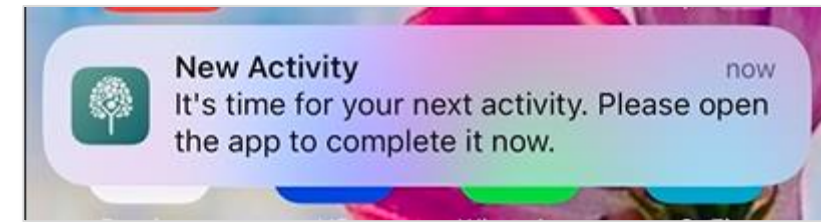
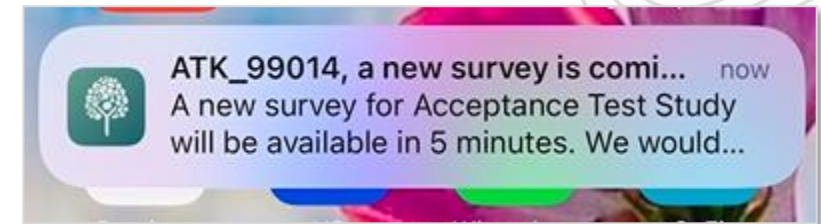
NEW IN 2.5



What's new in DFengage 2.5

- ▶ Custom push notifications and timing
 - ▶ Defined in DFsetup for all or specific visits
 - ▶ Based on specific clock times or relative offset in days, hours, or minutes before or after an activity is due
 - ▶ Customize titles and messages
 - ▶ Placeholders for study and participant name
 - ▶ Translation supported
 - ▶ For DFengage mobile only
 - ▶ Requires DFdiscover server & API version 5.11 or later and DFengage version 2.5 or later
- ▶ Usability improvements & bug fixes

Notification prior to activity



Notification at time of activity

See [Release Notes](#) for complete details



Upgrade Process for DFengage

DFengage mobile app

- ▶ On release, update becomes available in the app stores for Android and iOS
- ▶ Once available in the app stores, existing users will receive the update according to their device settings
 - ▶ Auto-update enabled: Update received automatically from app store
 - ▶ Auto-update disabled: Manually update from app store

DFengage web app

- ▶ DFnet instance will be automatically update to the newest version after the release
- ▶ Organizations with their own DFengage instance will upgrade on their own schedule
- ▶ No action required by end users – existing links will continue working as usual

Additional Resources

[DFengage 2.5 Release Notes](#)

- ▶ Details of changes since DFengage 2.4

[DFengage User Guide](#)

- ▶ Details for end users of DFengage

[DFengage Setup & Admin Guide](#)

- ▶ Details for study teams implementing DFengage in their studies

DFengage Release Notes

- Preface
- Introduction
- New Features and Enhancements
- All Updates
- Known Issues
- Advance Notices
- Copyrights

All Updates

Order	ID	App	Type	Description
1	13044	Mobile	New	Custom reminders can now be sent to study participants using DFengage mobile through push notifications. See details.
2	13010	Web	Fix	DFengage web now supports deployment behind a reverse proxy for self-hosted environments. See details.
3	12718	Web & mobile		Corrected issues with page label substitutions for completed activities. Substitutions as defined in the DSetup page map are now displayed consistently.
4	12743	Web & mobile		
5	13206	Web & mobile		

[Download PDF](#)

DFengage User Guide

- DFengage Introduction
- Getting Started
- Completing Activities
- Additional Details
- Frequently Asked Questions
- Troubleshooting

[Download PDF](#)

Once you have completed DFengage setup described in [Getting Started](#), you will see three main areas of the app: **Today**, **History**, and **Settings**. The app may look different depending on whether you're using the web app or the mobile app, since the screen will adjust based on the size of your screen.

DFengage on mobile / smaller screens:

Today

History

Settings

DFengage Setup & Admin Guide

- DFengage Introduction
- Study Setup for ePRO
- Study Administration for ePRO
- Troubleshooting

[Download PDF](#)

User Access

Each DFengage user requires a DFdiscover user account with access to one study, one site, one subject ID, and the ePROdata role defined as described above. **DFengage will not work if the user has permissions for more than one study or subject ID.** An example DFengage user account is shown below.

Username	Status	Active	New Password
beta007	2020-11-29	Select 2007	DFNet Research, Inc.
beta008	2020-11-29	Subject 2008	DFNet Research, Inc.
beta009	2020-11-29	Subject 2009	DFNet Research, Inc.
beta010	2020-11-29	Subject 2010	DFNet Research, Inc.

Username: beta007 Status: Active New Password: _____

User Profile Preferences Permissions

Study or DFdiscover Administrator: None

Allow access to Single Router

Study Roles

Study	Site	Subjects	Role Name
809 DFengage Beta	2	2007	ePROdata

In DFdiscover 5.10 and later, ePRO user profile details, including name and email address, are hidden and may not be updated in DFadmin. Instead, personal details are entered, updated, and viewed only by authorized users through DFweb's **ePRO Management** page. See [DFweb User Guide](#), [ePRO Management](#) and [System Administrator User Guide](#), [ePRO Admin Permissions](#) for details.

A note about these materials

- ▶ These slides cover how to use DFengage when using the mobile app (installed on a tablet or smartphone) or web app (accessed through a browser)
- ▶ Some instructions are the same on mobile and web; some are different
- ▶ Information specific to mobile or web are noted using the cards below:

MOBILE

WEB

- ▶ If you are using mobile or web only in your study, adapt these slides as needed by removing instructions for the modality you are not using



Getting Started with DFengage

For Study Teams & Site Staff

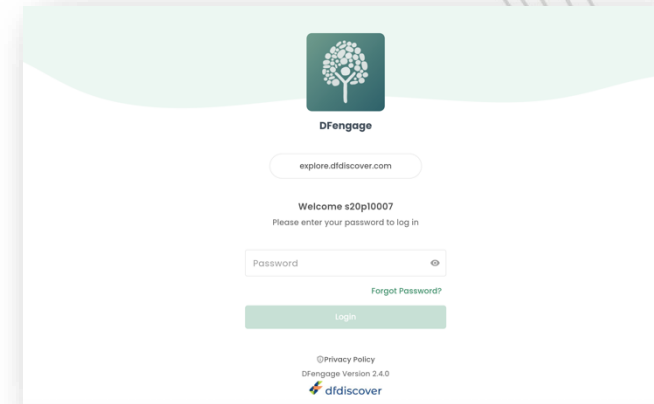
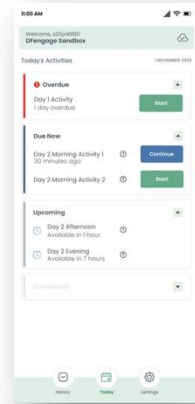


DFengage Mobile vs. Web

Key functionality is the same between web and mobile, with a few differences:

Feature	DFengage mobile	DFengage web
Complete scheduled activities online	✓	✓
Complete scheduled activities offline	✓	✗ internet connection required
Set PIN for easy login	✓	✗ password required for each login
Streamlined invitation workflow	✓	✓
Forgot password & two-factor authentication	✓	✓
Offline notifications	✓	✗ notifications sent via email
Push notifications	✓ no email required	✗ notifications sent via email
Custom push notifications	✓ ePRO notifications in DFsetup	✗
Notifications in participant's local time	✓ sent using device time zone	✗ sent using server time zone
View history of completed activities	✓	✓
Unique ePRO accounts	✓	✓
Accessible via web browser	✗ requires app installation	✓
Requires installation on a phone/tablet	✓	✗ no installation required

Considerations for Mobile vs. Web



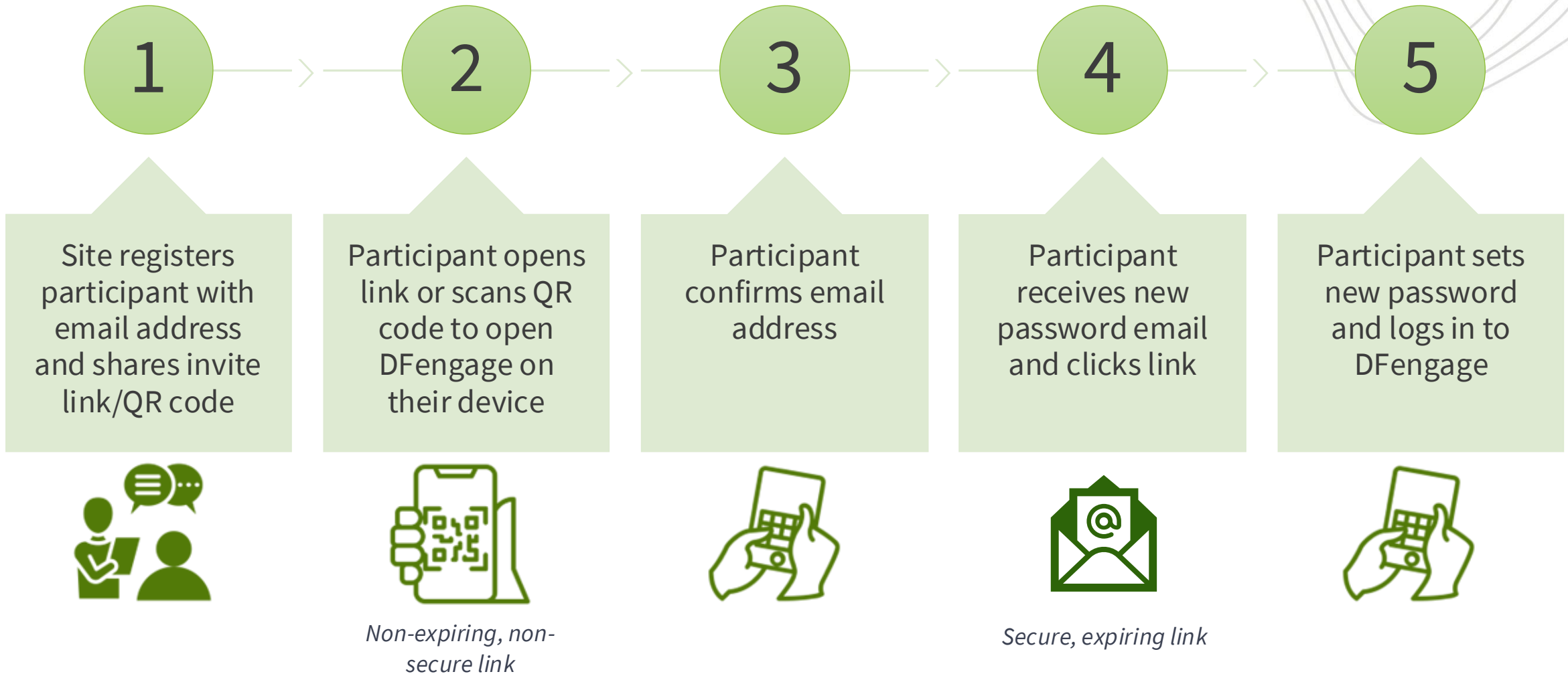
Mobile best when:

- ▶ Activities are frequent (e.g., daily surveys)
- ▶ Internet connection not always available
- ▶ Simpler access with PIN (vs. password)
- ▶ Push notifications help increase patient engagement

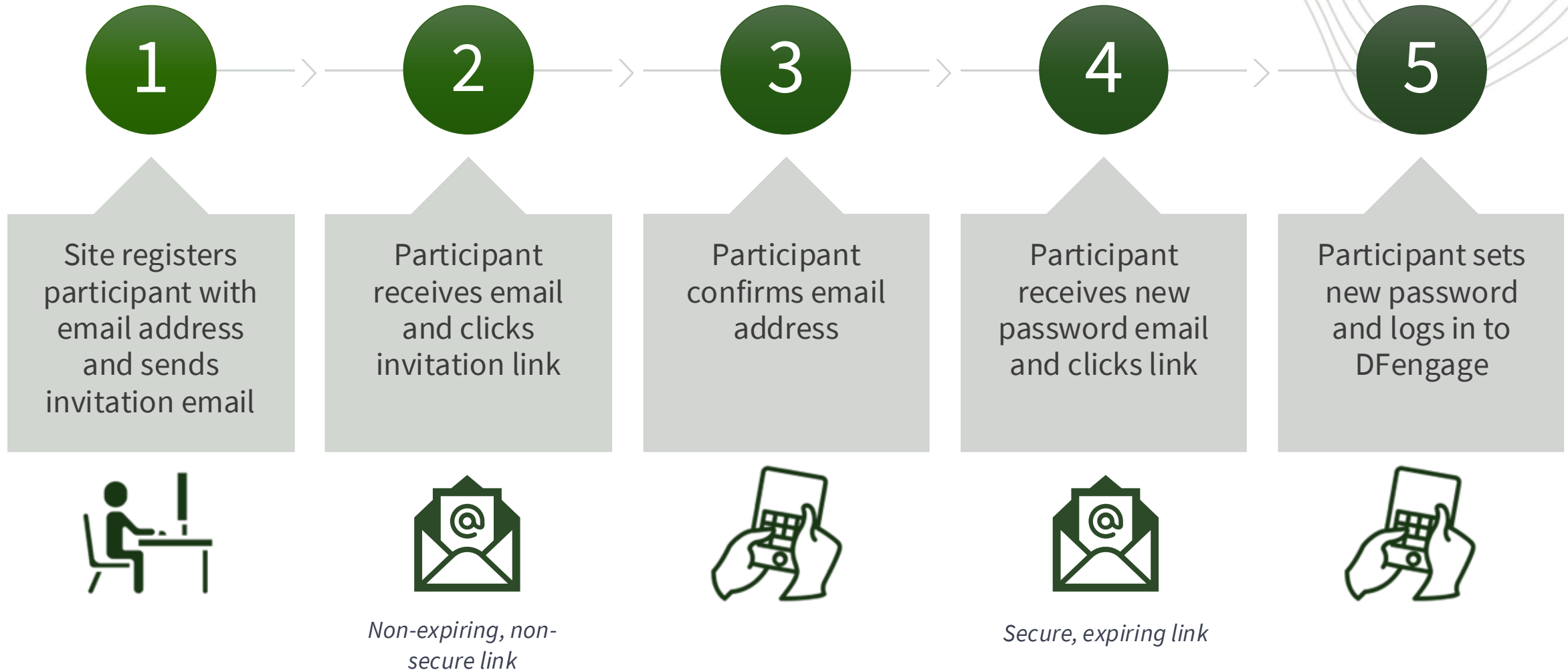
Web best when:

- ▶ Activities are infrequent (e.g., once; every few months)
- ▶ No internet connectivity limits
- ▶ Preference not to install an app
- ▶ Email-based reminders sufficient for patient engagement

Streamlined Login ePRO Onboarding Flow for In-Person Participants



Streamlined Login ePRO Onboarding Flow for Remote Participants





Streamlined Login

Access Links for DFengage Web & Mobile

Simplifying DFengage login

- ▶ Subject-specific **invite** and **login** links
- ▶ Server-specific link requires both username and password
- ▶ Non-expiring
- ▶ Password always required for login

From **subject-specific invite link**

From **subject-specific login link**

From **server-specific link**



Access Links Details

- ▶ When to use which link:
 - ▶ **Invite** = participant has not yet confirmed their email address or set a password
 - ▶ **Login** = participant knows their password but needs the link to access their activities on the web, or needs to set up DFengage mobile on a new device
 - ▶ **Server-specific** = generic link for any participant, requires username to be entered
 - ▶ These are non-expiring links (not secure, no expiry)
- ▶ Default links using **dfengage.dfdiscover.com** provide flexibility for web & mobile:
 - ▶ Directs to mobile app on a supported phone or tablet
 - ▶ Otherwise, directs to DFengage web
- ▶ Learn more about access links in the [DFengage Setup & Admin Guide](#)



Login without Access Links

1. Enter **server**



2. Enter **API**
(may be skipped)



3. Enter **username**
and **password**

Without an access link,
server & API are not
known to DFengage

- ▶ Server is required
- ▶ API may be skipped if provided by the DFdiscover server
- ▶ Both username & password required to login

DFengage

DFdiscover Server

Continue

Privacy Policy
DFengage Version 2.4.0
dfdiscover

DFengage

API

Continue

Privacy Policy
DFengage Version 2.4.0
dfdiscover

DFengage

explore.dfdiscover.com

Username

Password

Forgot Password?

Login

Privacy Policy
DFengage Version 2.4.0
dfdiscover




Getting Started with DFengage

For Study Participants

Follow instructions provided by research team


The research team will provide you with information needed to access DFengage

- ▶ An invitation email with a link to open DFengage mobile or DFengage web
- ▶ A link or QR code to access DFengage on the web
- ▶ A link or QR code to set up DFengage on your mobile device

 **Invite Link:** Prompts the subject to confirm their email and set a password. Use this link if subject does not have a password.

<https://dfengageweb.dfdiscover.com/open?server=explore.dfdiscover.com&api=https://explore-dfws.dfdiscover.com:443&username=s804p902005&invite>


[Copy Link](#)




[Copy QR Code](#)

Example invite link & QR code

DFengage v2 Test Invitation to DFengage 😊 ↶ ↷ ↸

 **noreply@dfdcover.com** <noreply...> Monday, October 27, 2025 at 10:24 AM

To:  Laura Joldersma

Hello Laura J (s998p3101), you've been invited to participate in DFengage v2 Test.

[Click here to activate your account](#)
Or paste this link into your web browser: <https://dfengageweb.dfdiscover.com?server=explore-suse.dfdiscover.com&api=https://explore-dfws.dfdiscover.com:443&username=s998p3101&invite>

NOTE: Replies to this email are not monitored. Please contact the research team if you have any questions or issues.

Example invitation email



Getting Started with DFengage Mobile

MOBILE

Step 1: Install DFengage

iPhone/iPad

Available from [Apple App Store](#)

iOS/iPadOS 14.4 or newer required



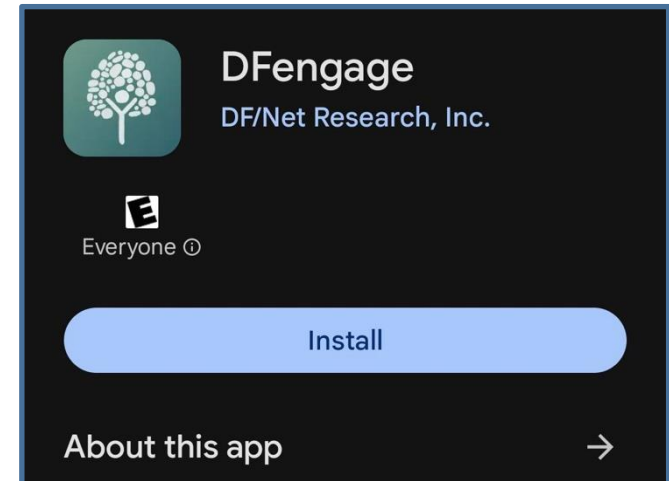
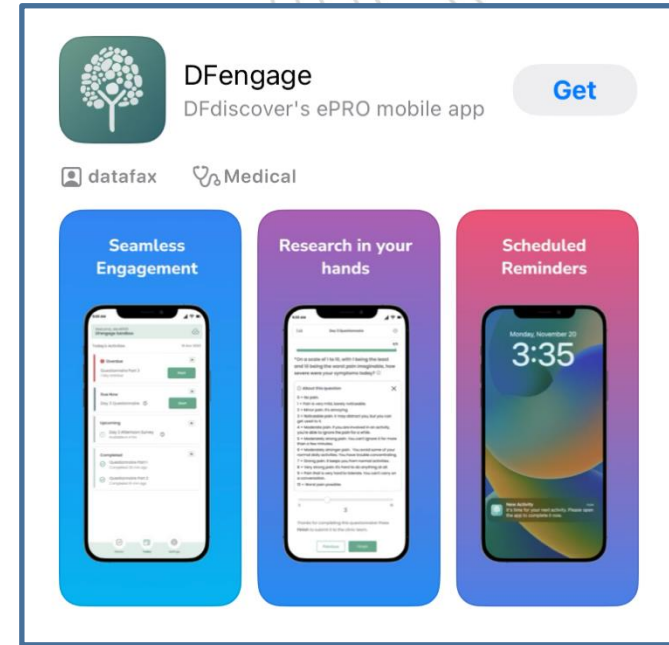
Android

Available from [Google Play Store](#)

Android 8.0 or newer required



The research team may also give you a special QR code or link to use

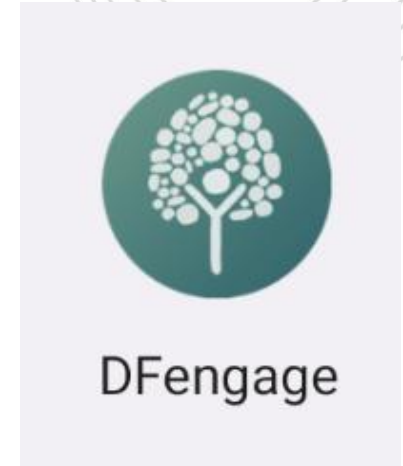


Step 2: Open DFengage

- ▶ Once installed, open DFengage:
 - ▶ Tapping “Open” from the app store
 - ▶ Find and tap the DFengage icon on your phone screen or in your apps list
 - ▶ Click the special link provided by the research team
- ▶ Default interface language is **English** but DFengage will switch to **French** or **Spanish** based on your device language setting



iPhone



Android

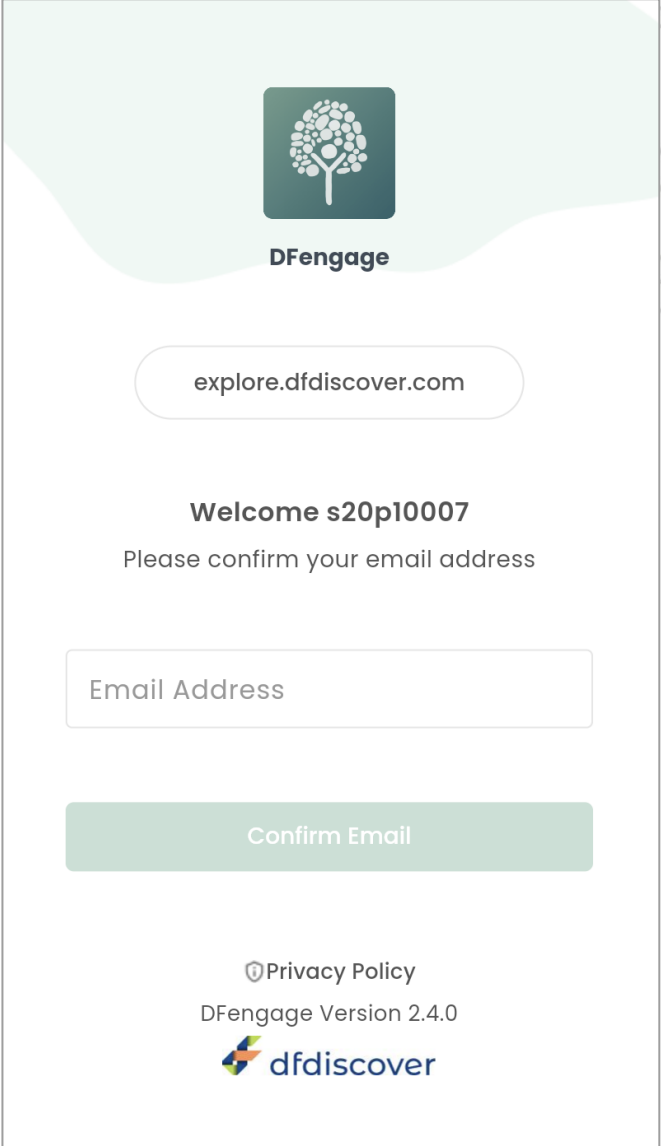
Step 2: Open DFengage

- ▶ Introduction screen gives app overview over 4 pages
- ▶ Screen scrolls automatically through 4 pages, or swipe to scroll manually
- ▶ Tap **Get Started** to continue to login page
- ▶ The introduction screen will not show again after tapping Get Started



Step 3: Confirm your email address

- ▶ This step confirms your registration
- ▶ Enter your email address provided to the research team
- ▶ Click **Confirm Email**
- ▶ This will verify your account and send you a link to set your password
- ▶ Find the email with subject line **DFdiscover password reset** and click the link in it

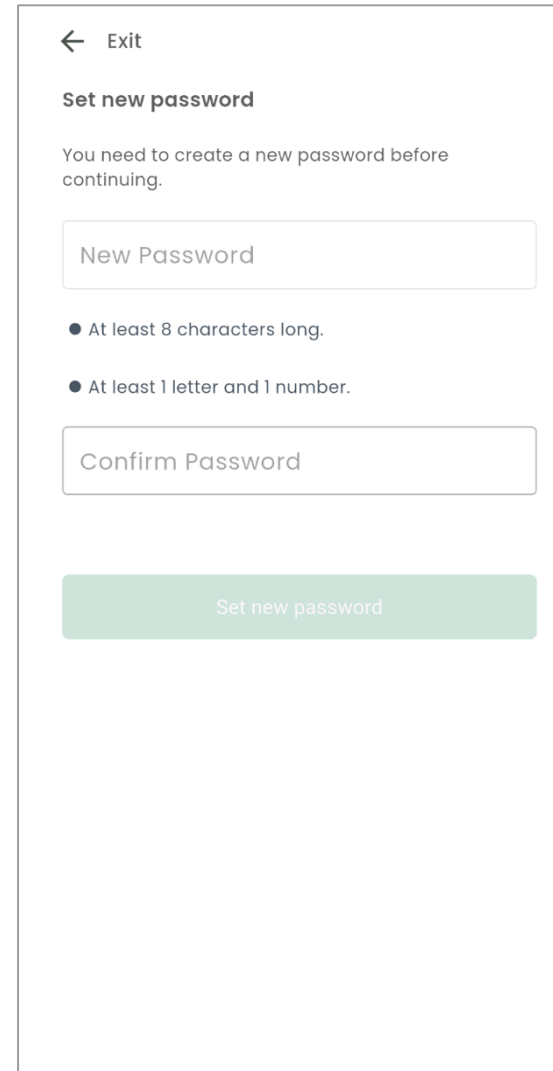


The screenshot shows a confirmation page for DFengage. At the top, there is a logo consisting of a tree made of dots above the text "DFengage". Below the logo is a rounded rectangular button containing the URL "explore.dfdiscover.com". Underneath the button, it says "Welcome s20p10007" followed by "Please confirm your email address". There is a text input field with the placeholder "Email Address". Below the input field is a large green button labeled "Confirm Email". At the bottom, there is a link for "Privacy Policy" and the text "DFengage Version 2.4.0" next to the "dfddiscover" logo.

Step 4: Set new password

- ▶ Create a new password that only you know
- ▶ Follow any instructions shown for password length and complexity
- ▶ Enter the password a second time to confirm it
- ▶ Remember your password for future logins
- ▶ Press **Set New Password**
- ▶ You will be logged into DFengage with your new password

Note: This step will repeat later if your password expires during the study or if you request a password reset



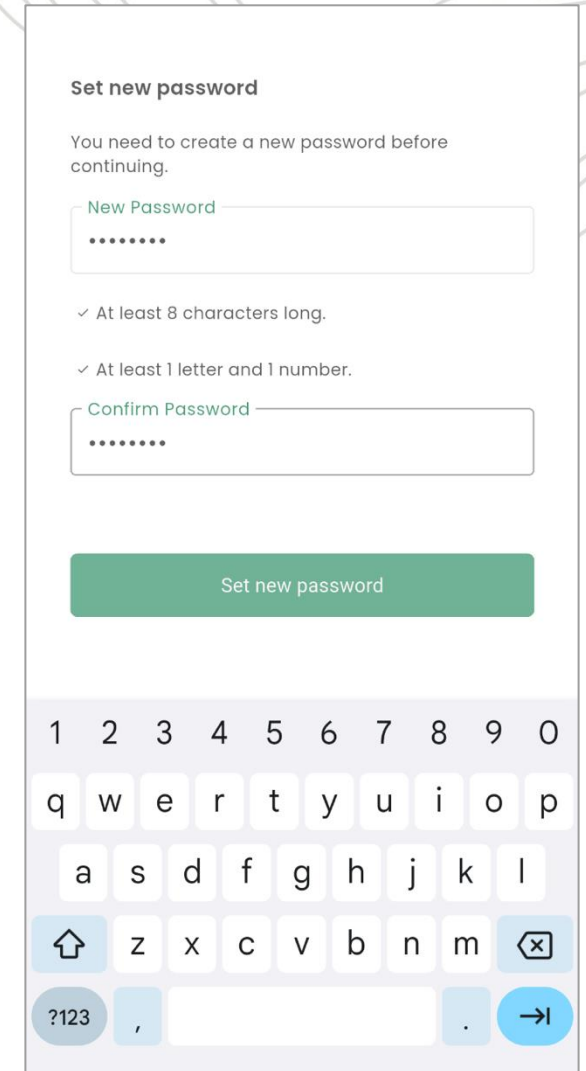
← Exit

Set new password

You need to create a new password before continuing.

- At least 8 characters long.
- At least 1 letter and 1 number.

Set new password



Set new password

You need to create a new password before continuing.

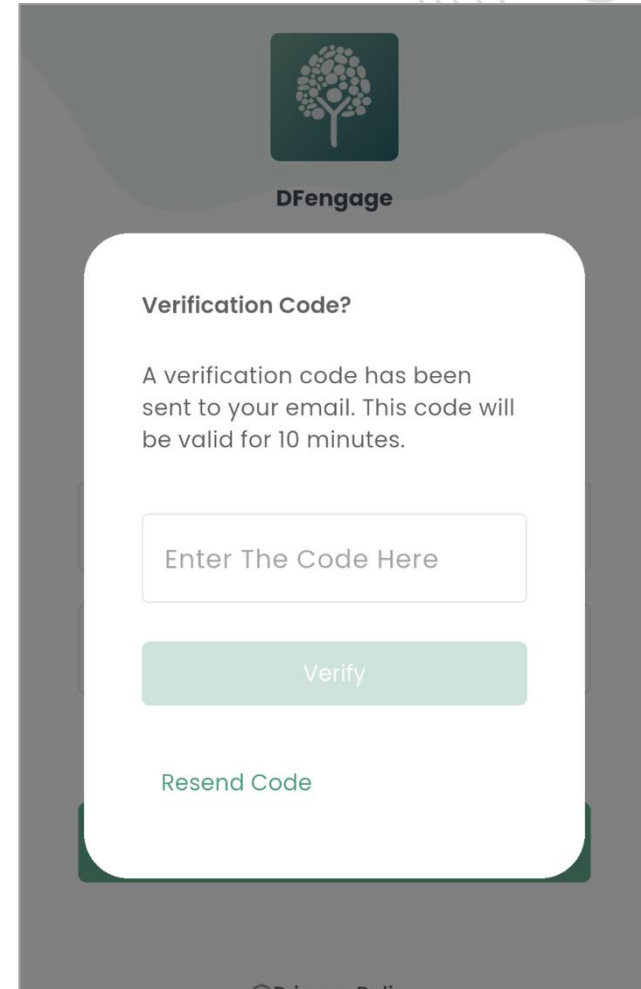
- ✓ At least 8 characters long.
- ✓ At least 1 letter and 1 number.

Set new password

1 2 3 4 5 6 7 8 9 0
q w e r t y u i o p
a s d f g h j k l
↑ z x c v b n m ↵
?123 , . →

Step 5: Two-factor authentication (*optional*)

- ▶ You may be prompted to provide a verification code after logging in with your password
- ▶ Find the email with subject line **Security Code for explore.dfdiscover.com**
 - ▶ NOTE: The subject line may have a different server name in place of “explore.dfdiscover.com”
- ▶ Return to DFengage and enter the code provided, then click **Verify**
- ▶ If the code expires, click **Resend Code** to get a new one

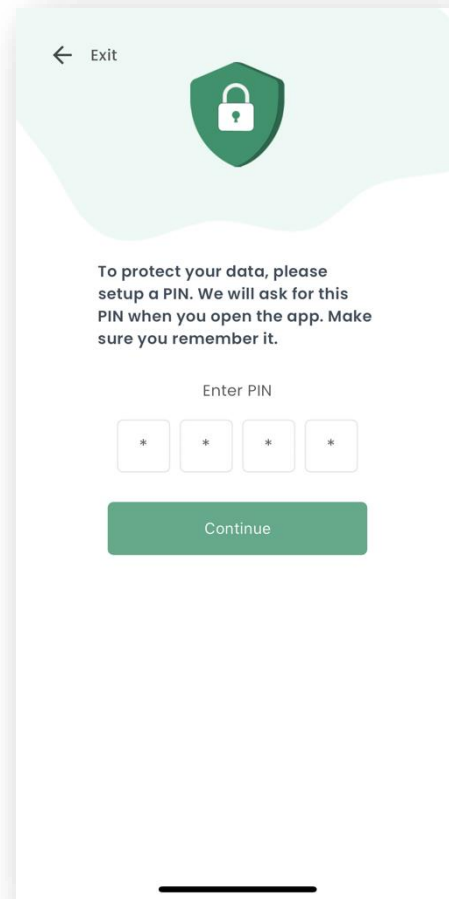


The screenshot shows the DFengage verification interface. At the top, there is the DFengage logo, which consists of a stylized tree icon above the text "DFengage". Below the logo, the text "Verification Code?" is displayed. A message states: "A verification code has been sent to your email. This code will be valid for 10 minutes." There is a text input field with the placeholder text "Enter The Code Here". Below the input field is a green button labeled "Verify". At the bottom of the form, there is a link labeled "Resend Code".


Step 6: Set PIN

A PIN is required to protect your data. You will enter your PIN each time you open the app

- ▶ Choose a four-digit PIN
- ▶ Re-enter PIN to confirm



← Exit

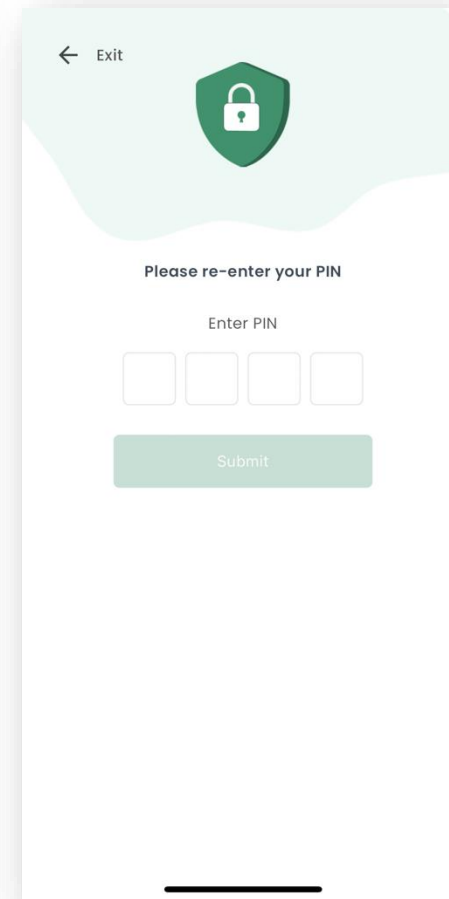


To protect your data, please setup a PIN. We will ask for this PIN when you open the app. Make sure you remember it.


Enter PIN

* * * *

Continue



← Exit

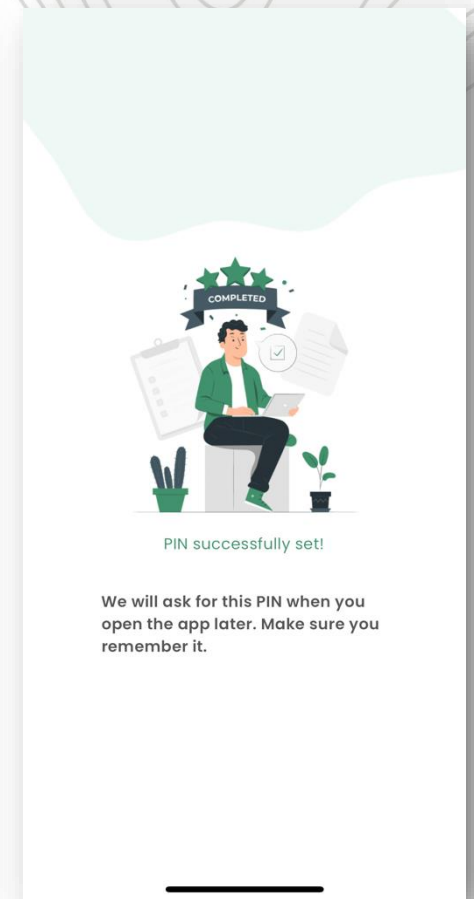


Please re-enter your PIN


Enter PIN

□ □ □ □

Submit



COMPLETED

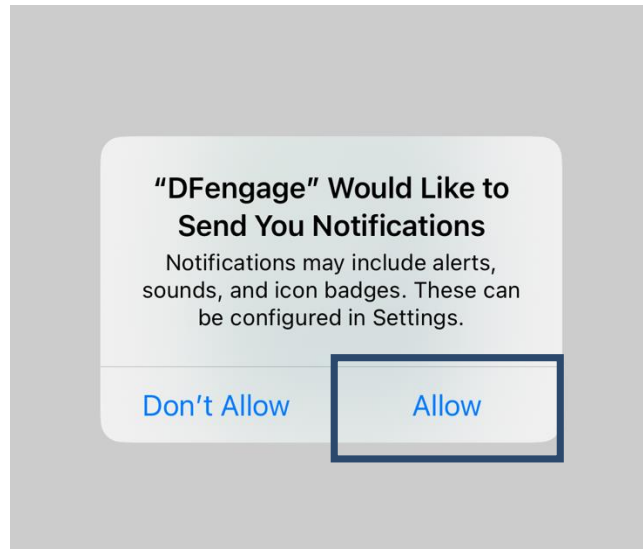


PIN successfully set!

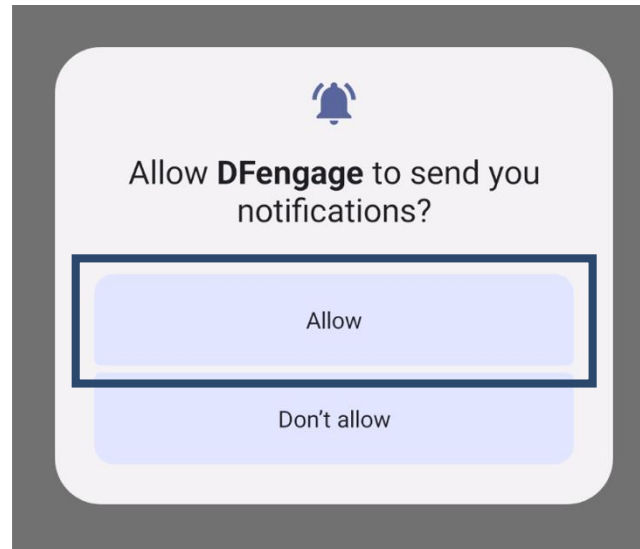
We will ask for this PIN when you open the app later. Make sure you remember it.

Step 7: Allow notifications

- ▶ Allow DFengage to send you notifications about new activities



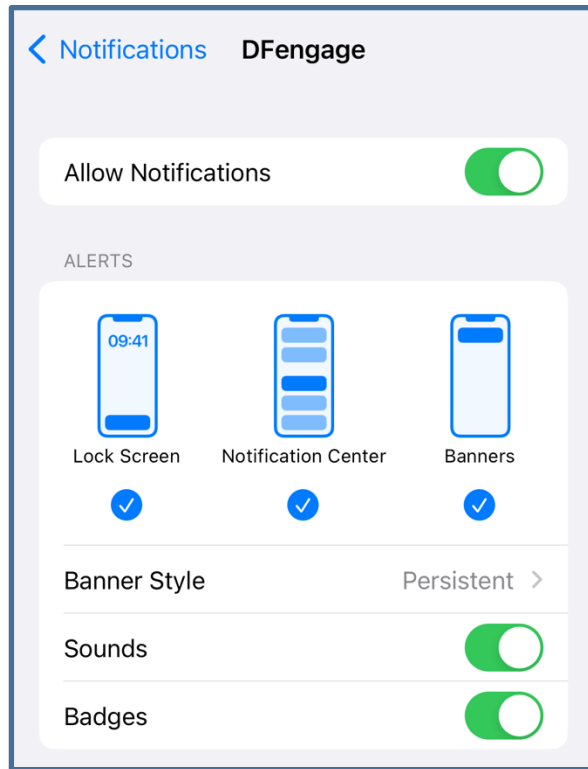
iPhone



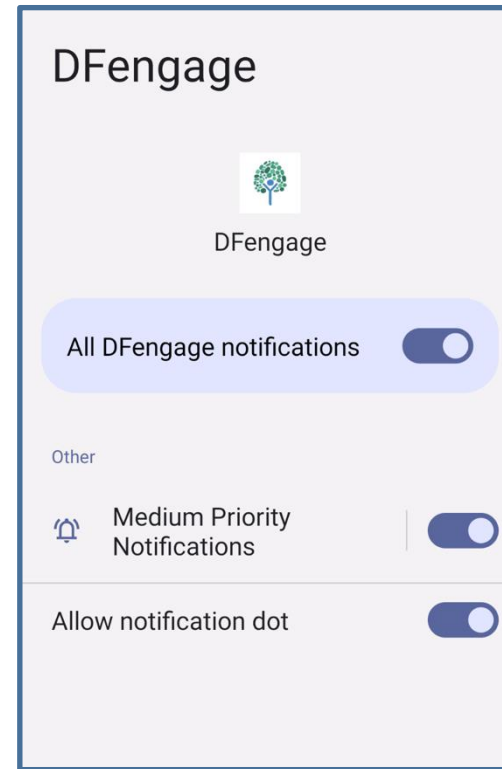
Android

Step 7: Enable all notification options

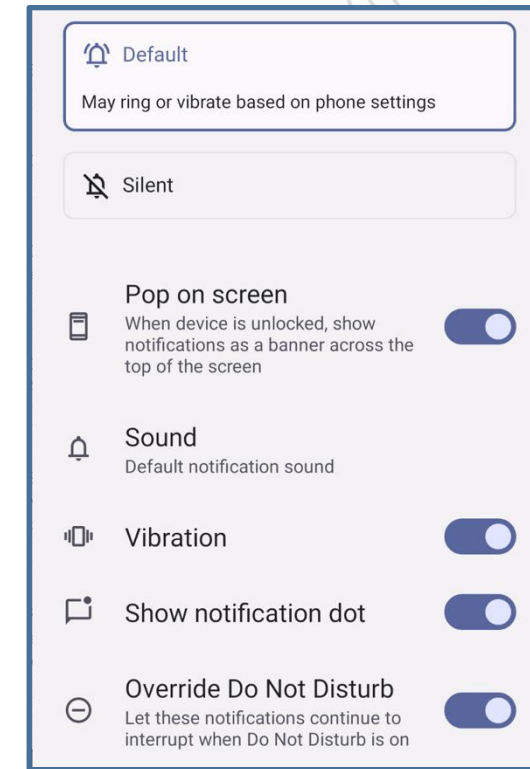
Enable all notification options in Settings so no reminders are missed



iPhone

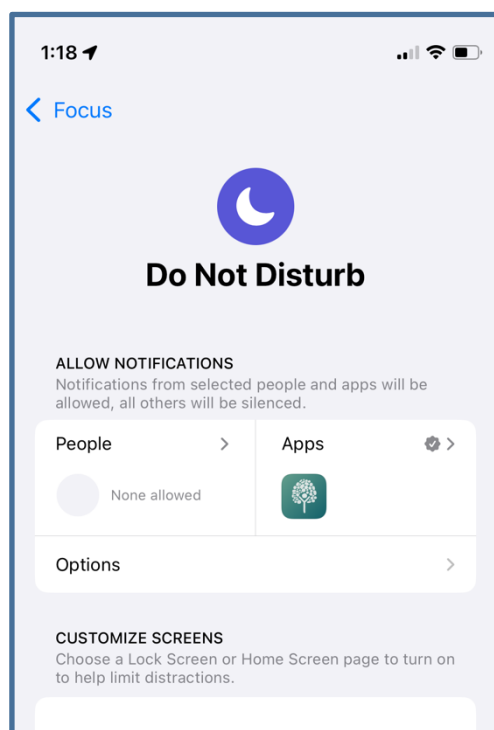
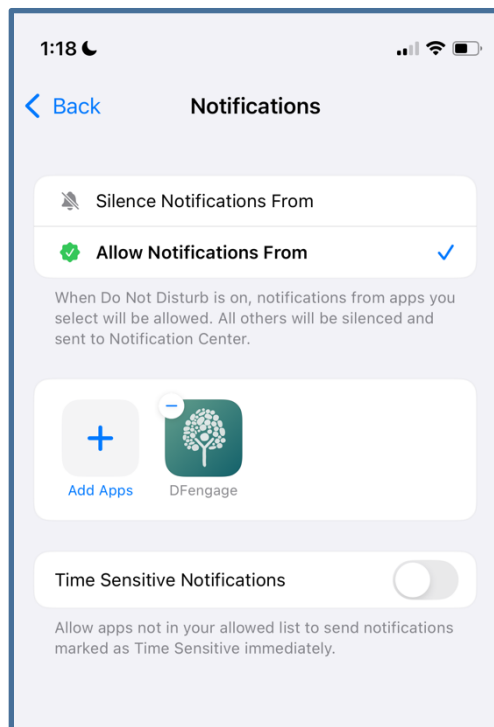


Android (may differ across devices)



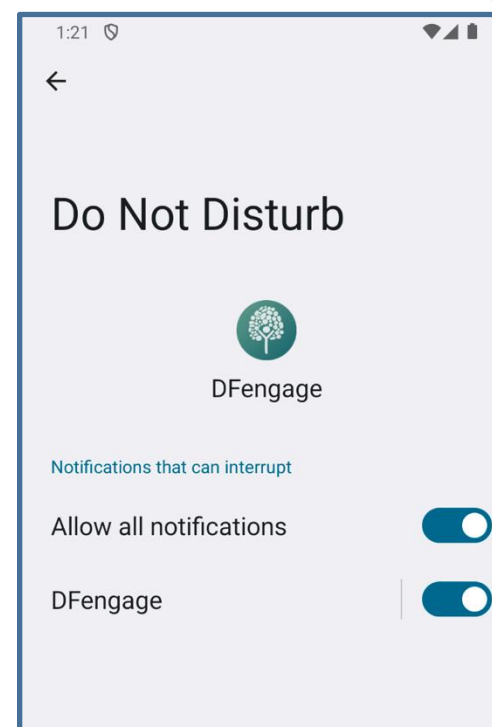
Step 7: Allow notifications in focus modes

Add DFengage as an allowed app in focus modes to avoid missing notifications



iPhone

Settings > Focus > Select mode > Apps

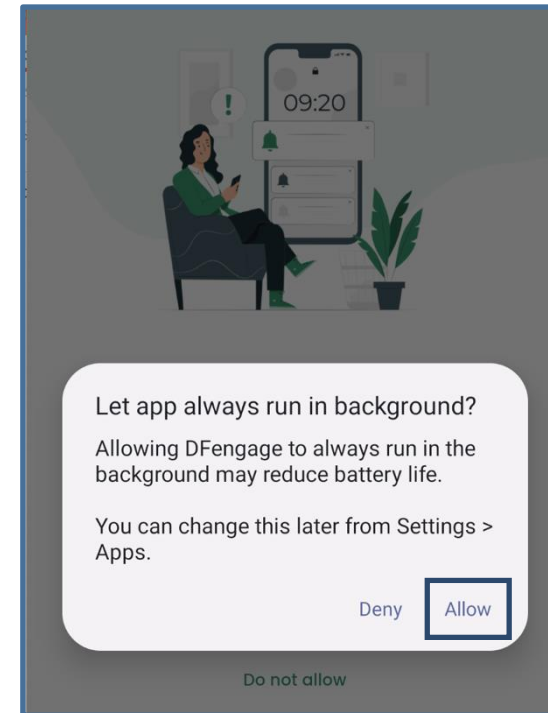
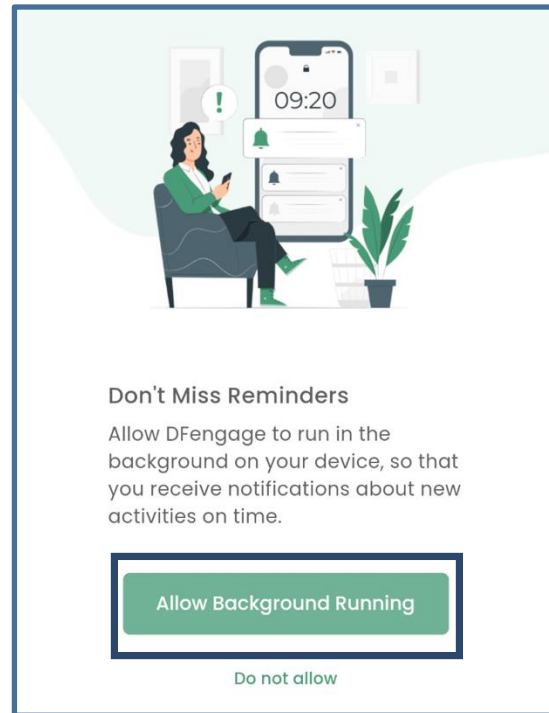


Android

Settings > Notifications > Do Not Disturb > Apps

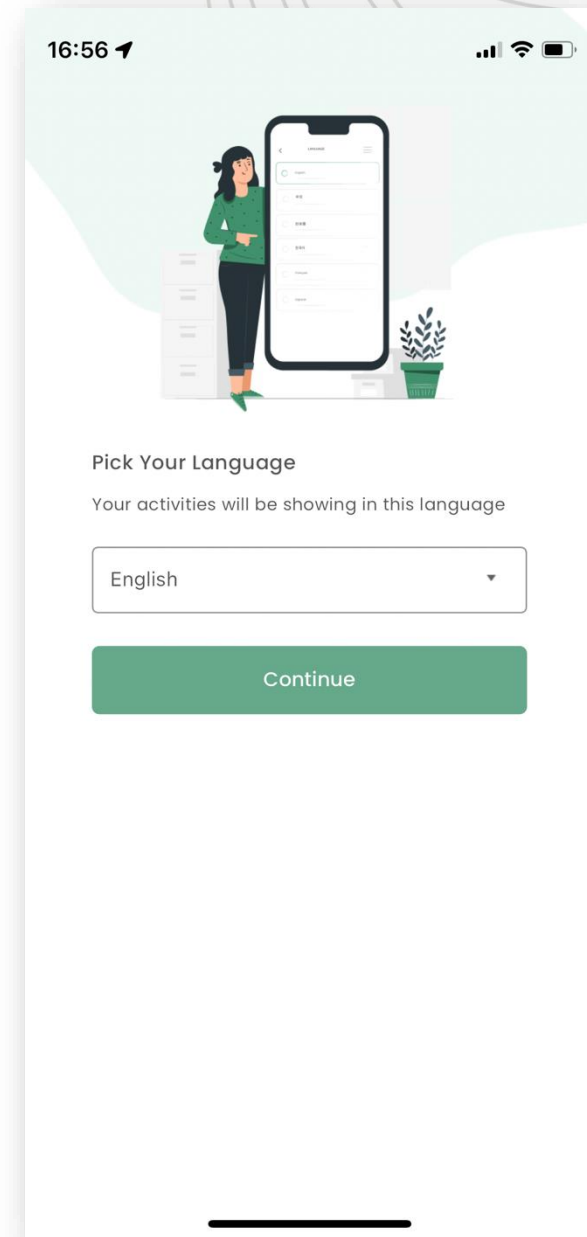
Step 8: Allow background running (*Android only*)

- ▶ Allow background running to ensure notifications are received on time
- ▶ Not applicable when using iPhone

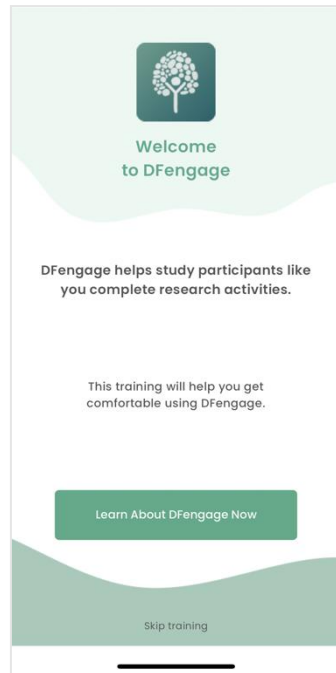


Step 9: Select language (*optional*)

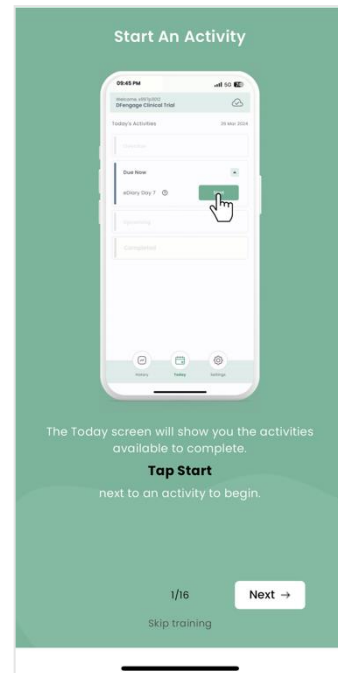
- ▶ This step may be skipped for your study or auto-detected from your device language
- ▶ If you want to change your language later, you'll need to log out and log in again
- ▶ Languages available here are specific to your study and may be different from the app interface languages available
 - ▶ DFengage interface is available in English, French, and Spanish, displayed according to your device language setting



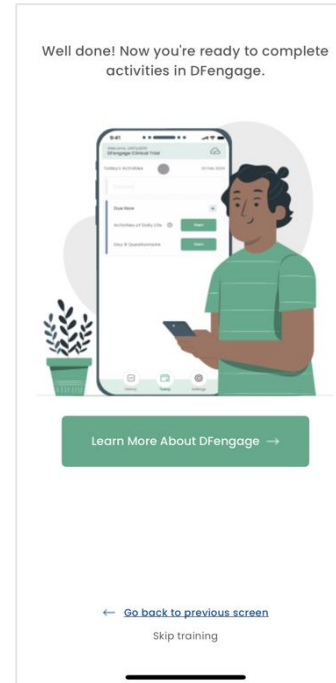
Step 10: Complete training



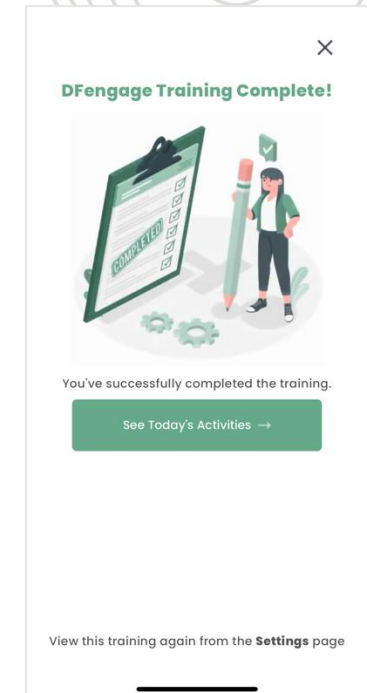
The training module teaches you how to use DFengage



Tap through each screen to learn how to complete activities and use the app's other features

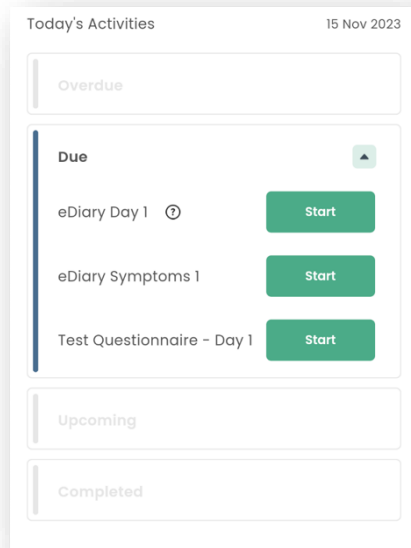


Later, you can access this training again anytime from Settings page

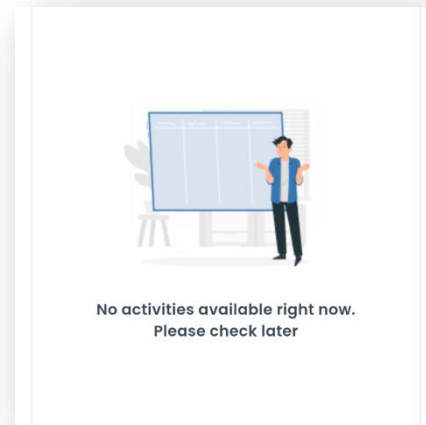


Setup complete!

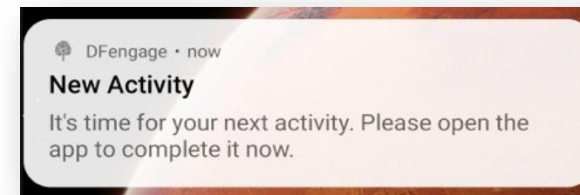
If you have activities ready to complete now, you'll see a screen like this:



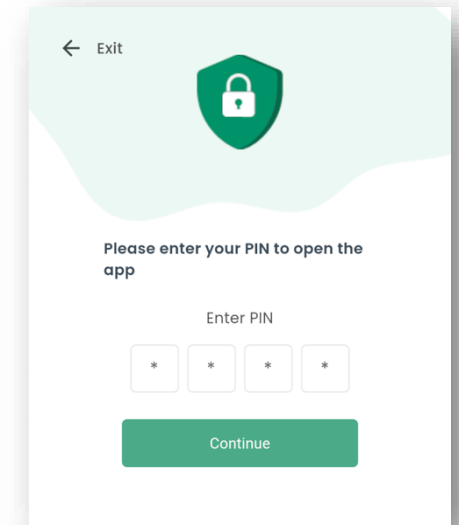
If you don't have any activities for today, you'll see a screen like this:



You'll receive a notification on your device when a new activity is ready

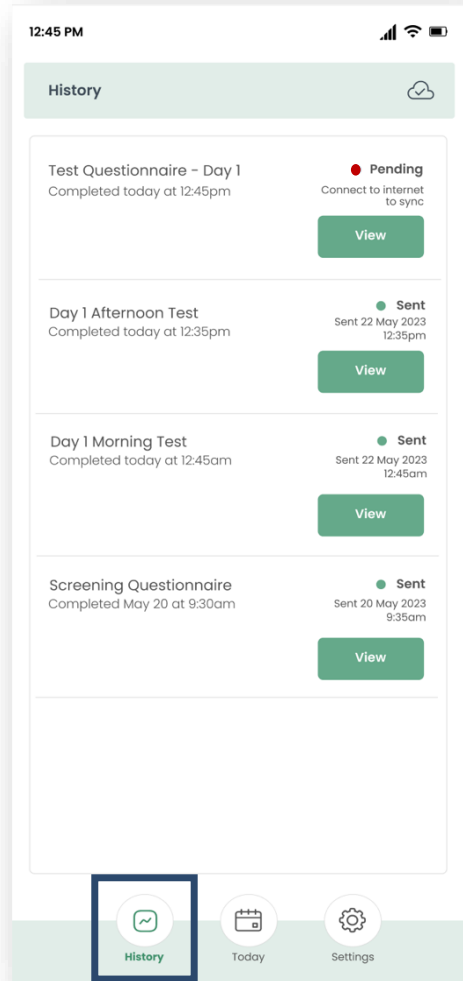


You'll need to enter your PIN to complete new activities



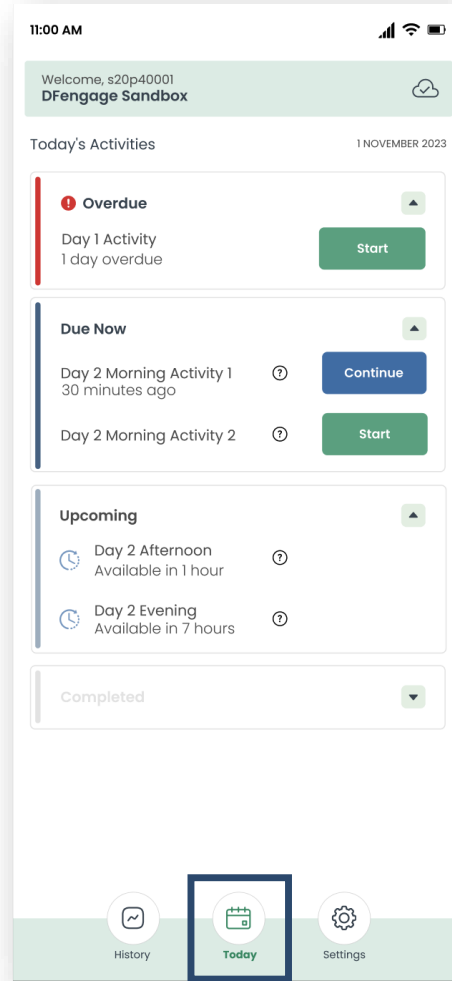
History

View all completed activities and their sync status



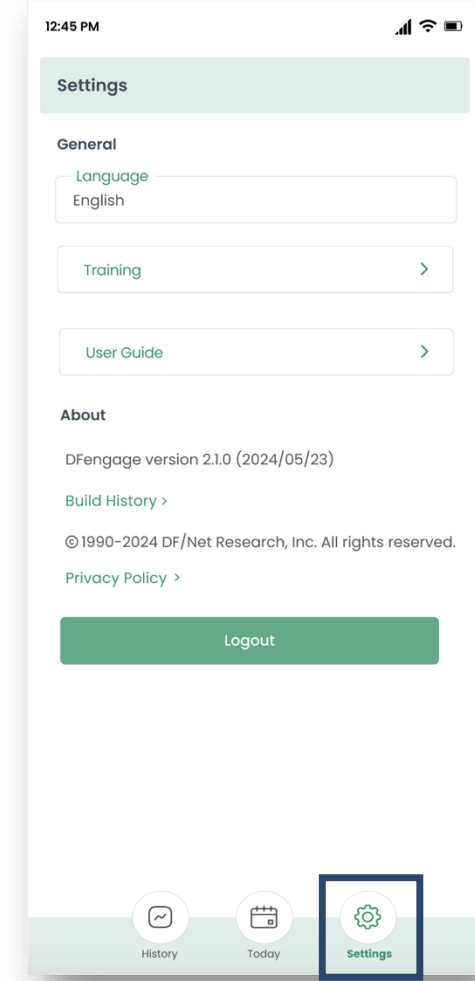
Today

This is your home page, where you will find all of today's activities



Settings

Find app information, access training & online user guide, and logout





Getting Started with DFengage Web


Step 1: Open DFengage

Using the invitation email, link, or QR code provided by the research team, open DFengage on the web

Invite Link: Prompts the subject to confirm their email and set a password. Use this link if subject does not have a password.

<https://dfengageweb.dfdiscover.com/open?server=explore.dfdiscover.com&api=explore-dfws.dfdiscover.com:443&username=s804p902005&invite>


[Copy Link](#)



[Copy QR Code](#)

Example invite link & QR code

DFdiscover Solutions Invitation to DFengage Inbox x

 **datafax@explore.dfdiscover.com** Thu 23 Oct, 12:30 ☆ 😊 ← ⋮

to me ▾


You've been invited to participate in DFdiscover Solutions.


[Click here to activate your account](#)

Or paste this link into your web browser: <https://explore-suse.dfdiscover.com:38443?server=explore.dfdiscover.com&api=https://explore-dfws.dfdiscover.com:443&username=s20p10007&invite>

NOTE: Replies to this email are not monitored. Please contact the research team if you have any questions or issues.

DFengage v2 Test Invitation to DFengage 😊 ← ↶ ↷

 **noreply@dfdiscover.com** <noreply...> onday, October 27, 2025 at 10:24 AM

To:  Laura Joldersma

Hello Laura J (s998p3101), you've been invited to participate in DFengage v2 Test.

[Click here to activate your account](#)

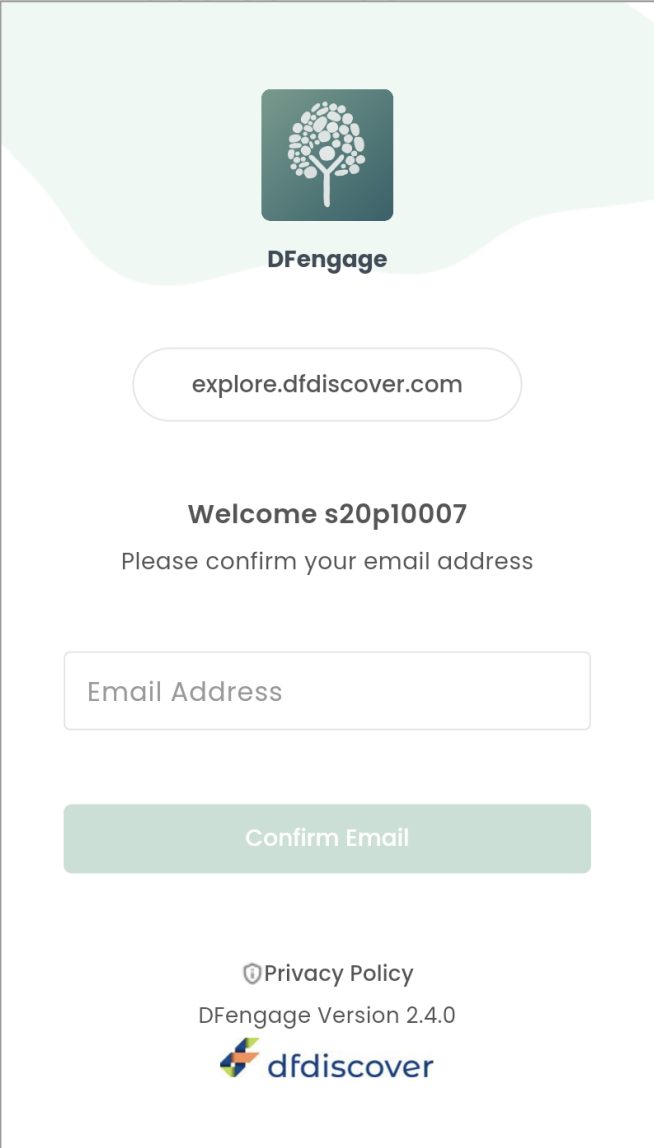
Or paste this link into your web browser: <https://dfengageweb.dfdiscover.com?server=explore-suse.dfdiscover.com&api=https://explore-dfws.dfdiscover.com:443&username=s998p3101&invite>

NOTE: Replies to this email are not monitored. Please contact the research team if you have any questions or issues.

Example invitation emails

Step 2: Confirm your email address

- ▶ Enter your email address provided to the research team to confirm your registration
- ▶ Click **Confirm Email**
- ▶ This will verify your account and send you a link to set your password
- ▶ Find the email with subject line **DFdiscover password reset** and click the link in it
 - ▶ The link is secure and private to you and must be used within 30 minutes
 - ▶ Use the same browser & device as the one used to confirm your email



The screenshot shows a confirmation page for DFengage. At the top, there is a logo consisting of a tree made of dots above the text "DFengage". Below the logo is a rounded button with the text "explore.dfdiscover.com". The main content area starts with "Welcome s20p10007" followed by "Please confirm your email address". There is a text input field labeled "Email Address". Below the input field is a large green button labeled "Confirm Email". At the bottom, there is a link for "Privacy Policy" and the text "DFengage Version 2.4.0" above the "dfddiscover" logo.

Step 3: Set new password

- ▶ Create a new password that only you know
- ▶ Follow any instructions shown for password length and complexity
- ▶ Enter the password a second time to confirm it
- ▶ Remember your password for future logins
- ▶ Press **Set New Password**
- ▶ You will be logged into DFengage with your new password

Note: This step will repeat later if your password expires during the study or if you request a password reset

← Exit

Set new password

You need to create a new password before continuing.

- At least 8 characters long.
- At least 1 letter and 1 number.

Set new password

Set new password

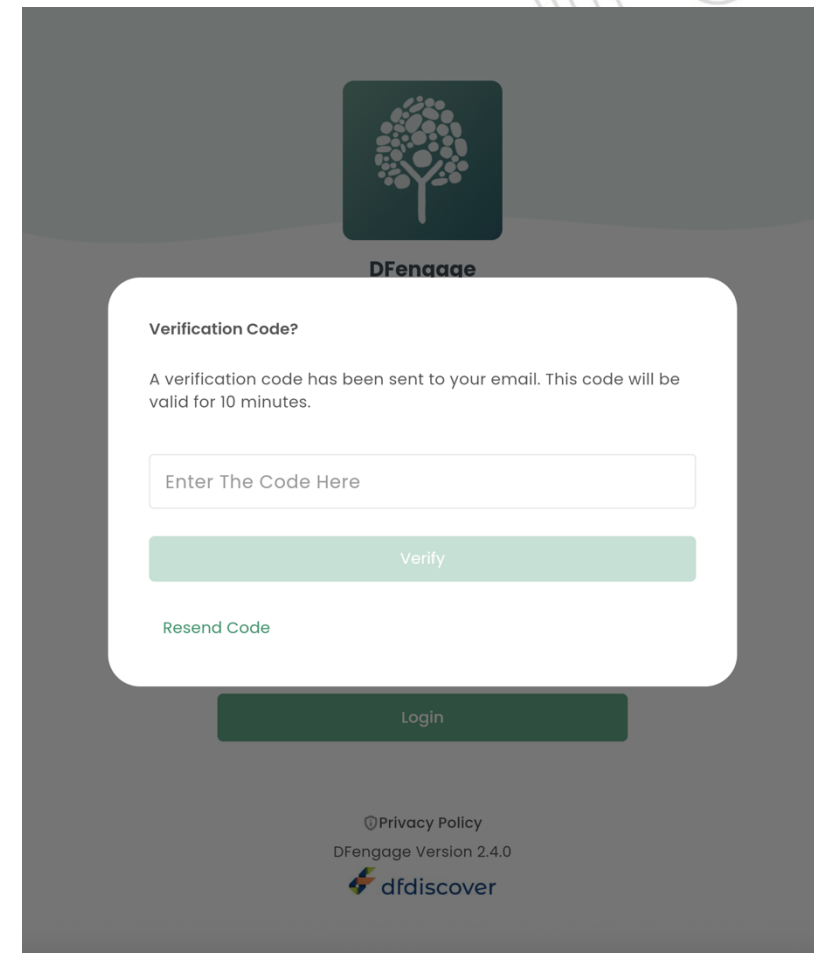
You need to create a new password before continuing.

- ✓ At least 8 characters long.
- ✓ At least 1 letter and 1 number.

Set new password

Step 4: Two-factor authentication (*optional*)

- ▶ You may be prompted to provide a verification code after logging in with your password
- ▶ Find the email with subject line **Security Code for explore.dfdiscover.com**
 - ▶ NOTE: The subject line may have a different server name in place of “explore.dfdiscover.com”
- ▶ Return to DFengage and enter the code provided, then click **Verify**
- ▶ If the code expires, click **Resend Code** to get a new one



The screenshot shows a dark-themed login interface for DFengage. At the top center is a logo consisting of a stylized tree made of dots. Below the logo is the text "DFengage". A white modal box is centered on the screen with the following content:

Verification Code?

A verification code has been sent to your email. This code will be valid for 10 minutes.

Enter The Code Here

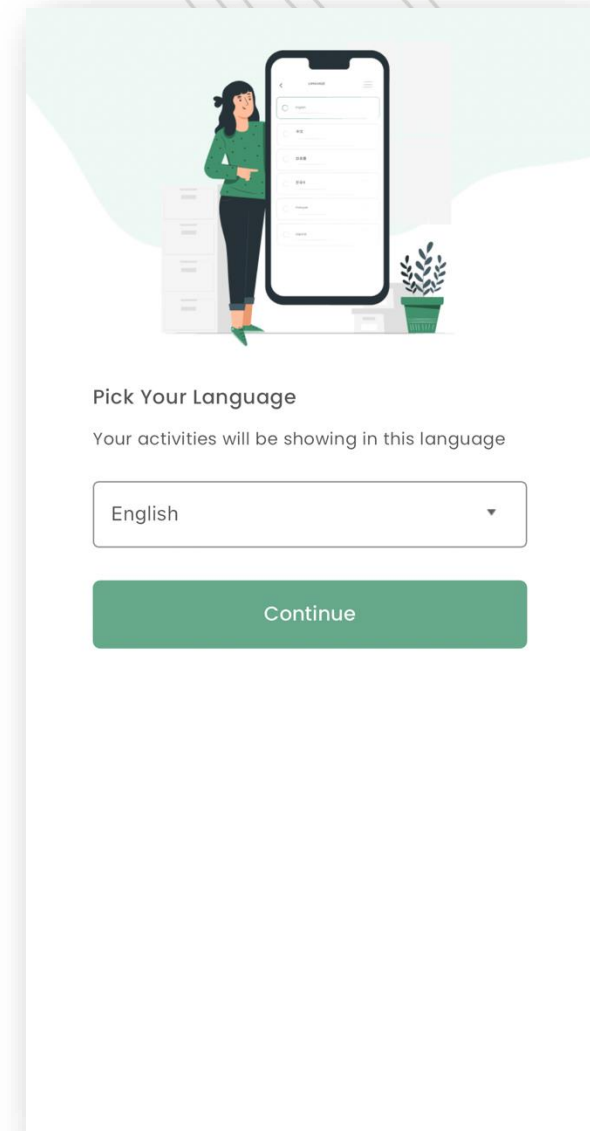
Verify

Resend Code

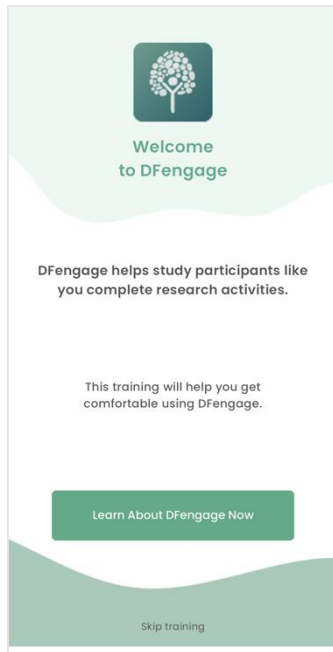
Below the modal box is a dark green button labeled "Login". At the bottom of the page, there is a link for "Privacy Policy", the text "DFengage Version 2.4.0", and the "dfddiscover" logo.

Step 5: Select language (*optional*)

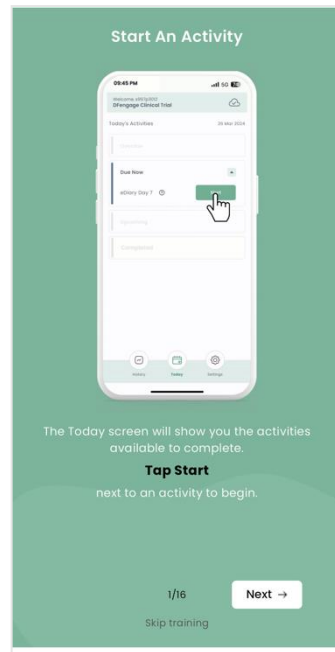
- ▶ This step may be skipped for your study or auto-detected from your device language
- ▶ If you want to change your language later, you'll need to log out and log in again
- ▶ Languages available here are specific to your study and may be different from the app interface languages available
 - ▶ DFengage interface is available in English, French, and Spanish, displayed according to your device language setting



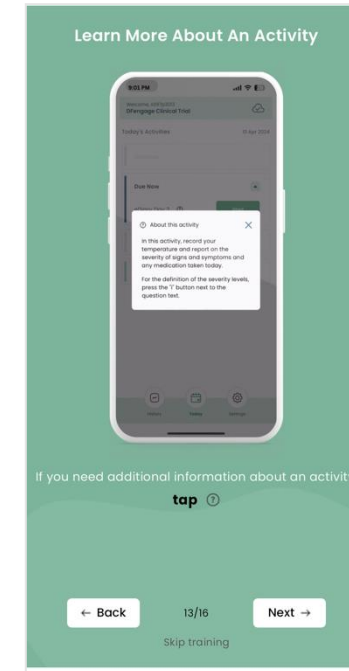
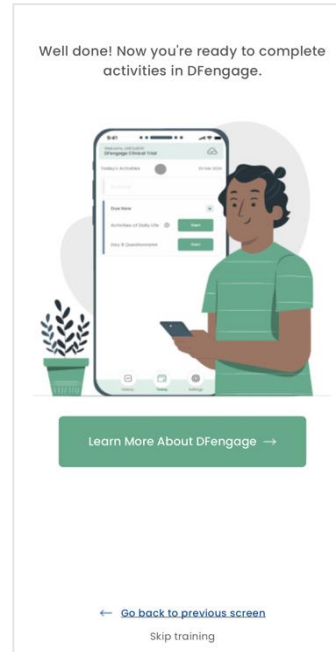
Step 6: Complete training



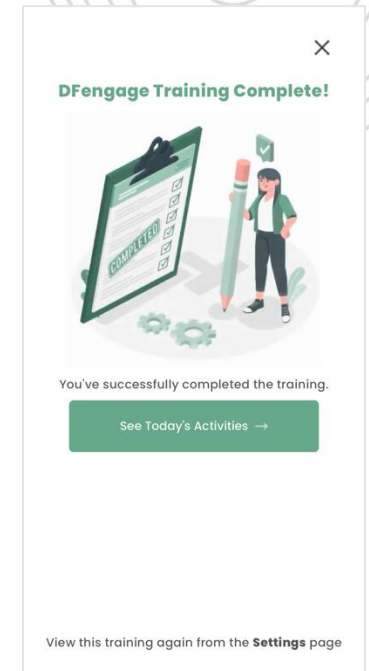
The training module teaches you how to use DFengage



Tap through each screen to learn how to complete activities and use the app's other features



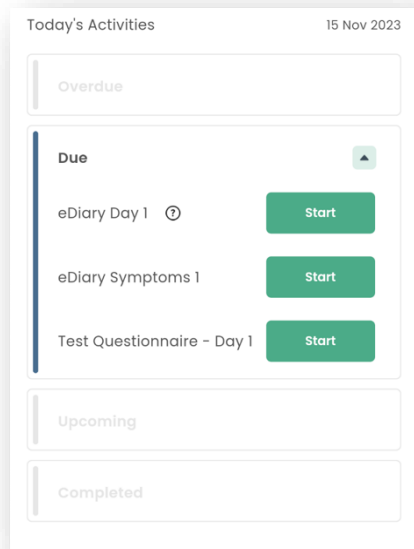
Later, you can access this training again anytime from Settings page



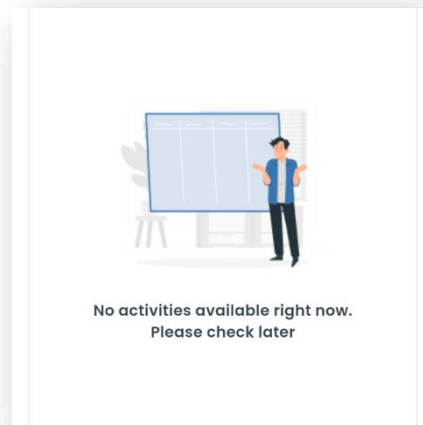
WEB

Setup complete!

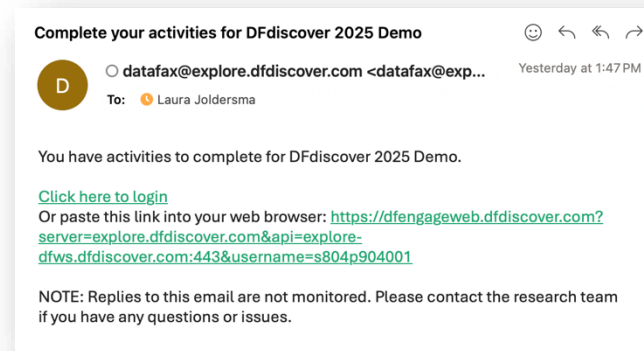
If you have activities ready to complete now, you'll see a screen like this:



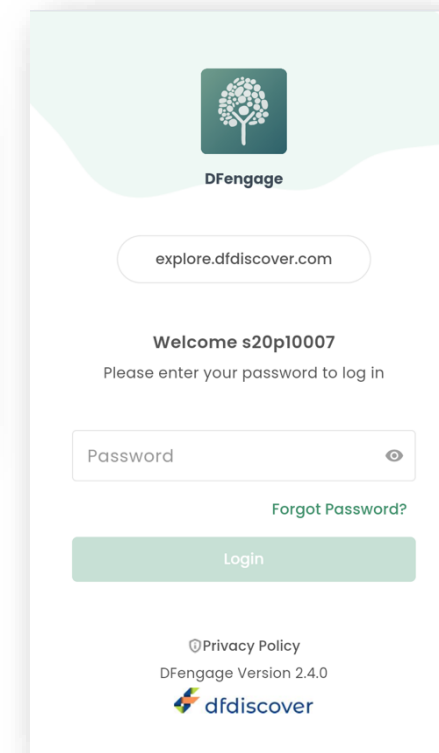
If you don't have any activities for today, you'll see a screen like this:



You'll receive an email when a new activity is ready



You'll need to login with your password to complete new activities



Today

This is your home page, where you will find all of today's activities

History

View all completed activities and their sync status

Settings




Find app information and access training & online user guide

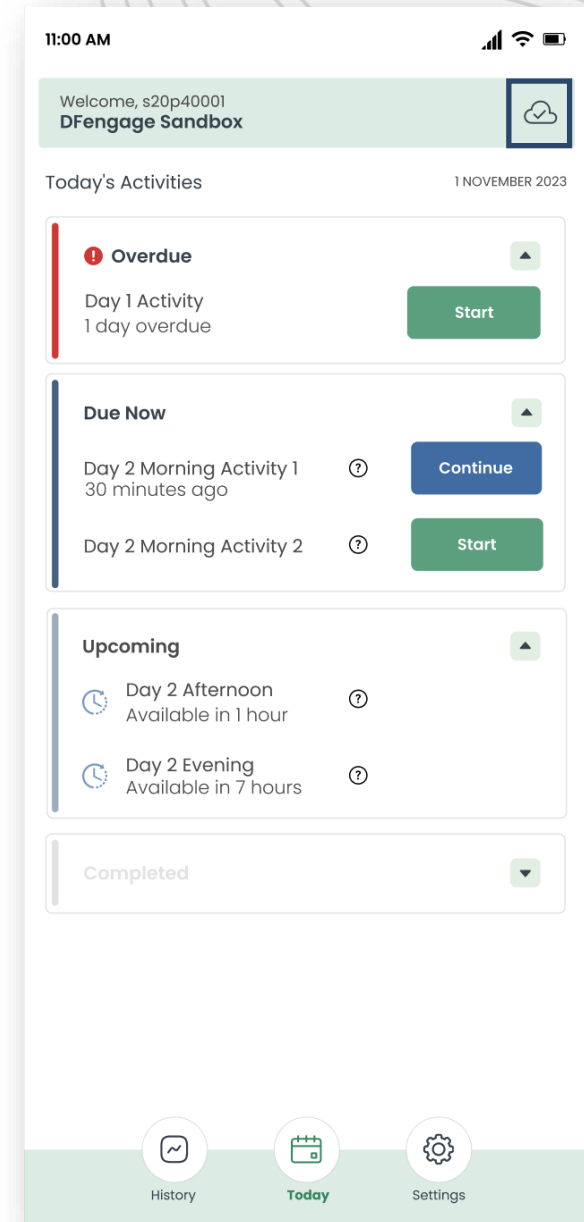


Completing activities in DFengage

For Study Participants

Today's Activities

- ▶ Your username and study name are shown in header
- ▶ Cloud icon indicates connection and sync status:
 -  Online, successful sync with the server
 -  Online, syncing in progress
 -  Offline, no connection with the server
- ▶ Activities are listed according to their status: Overdue, Due Now, Upcoming, Completed



Today's Activities

- ▶ Your username and study name are shown in header
- ▶ Activities are listed according to their status: Overdue, Due Now, Upcoming, Completed
- ▶ Logout button for when you are completed all your activities
 - ▶ Logging out is important to keep your data safe and secure

Welcome, s20p10007
DFdiscover Solutions [Logout](#)

[Today](#) [History](#) [Settings](#)

Today's Activities 20 Oct 2025

Overdue

eDiary (Day 1) 9 hrs overdue [Start](#)

Due Now

Morning Survey (Day 2) [Start](#)

eDiary (Day 2) [Start](#)

Upcoming

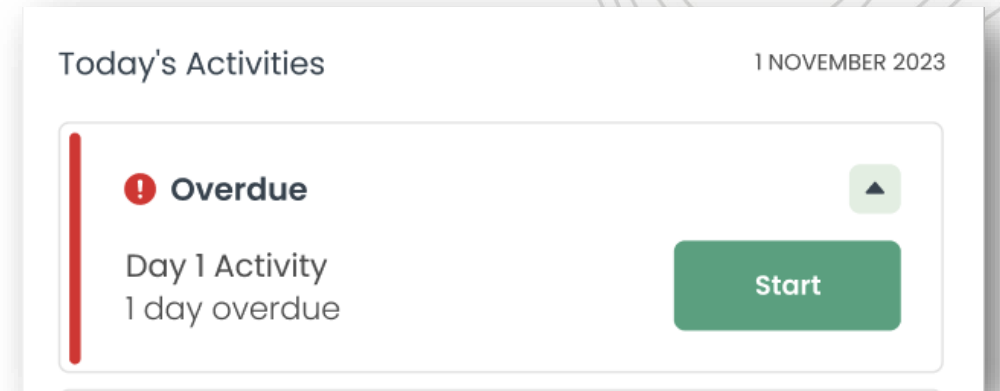
Afternoon Survey (Day 2)
Available in 17 mins

Evening Survey (Day 2) Available in 5 hrs

Completed

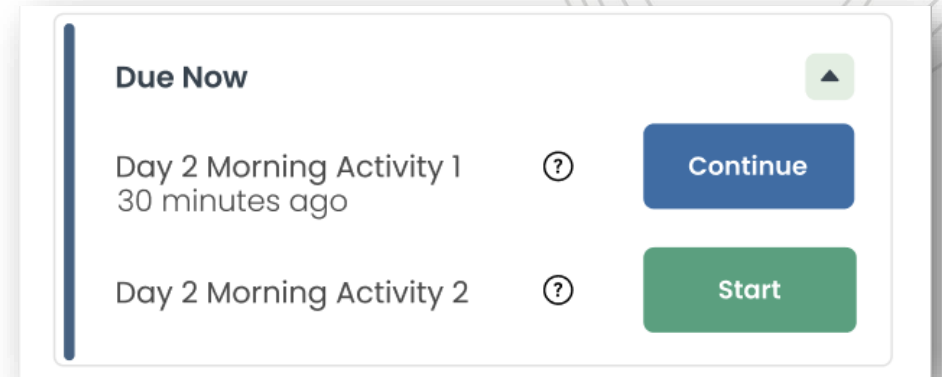
Overdue activities

- ▶ If you do not complete your activities on time, they may become overdue
- ▶ You will receive notifications for overdue activities as well as new activities
- ▶ Please complete these activities as soon as possible!
- ▶ This section is greyed out if you have no overdue activities



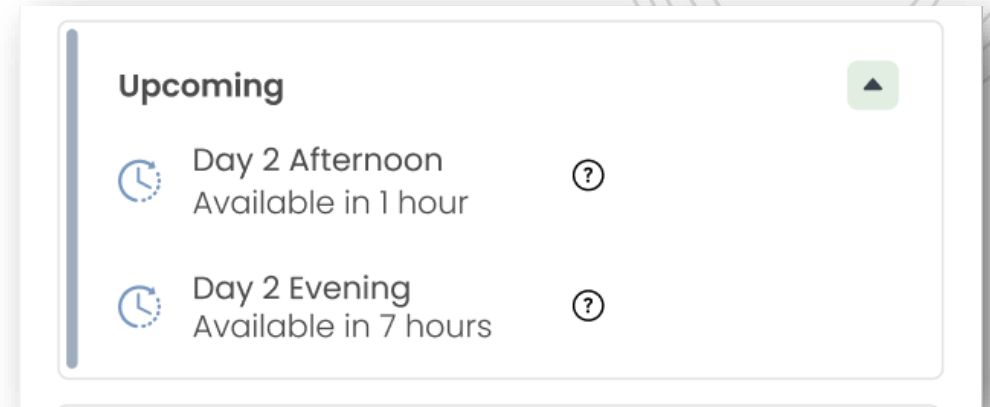
Due Now activities

- ▶ Activities that are ready to complete now are shown in **Due Now** section
- ▶ Click “?” icon to see more information about this activity from the research team
- ▶ Complete these activities before they become overdue!
- ▶ This section is greyed out if you have no activities due now



Upcoming activities

- ▶ You may have activities to complete later in the day that aren't yet available
- ▶ No **Start** button until the activity is available
- ▶ You will receive a notification when an upcoming activity is ready
- ▶ This section is greyed out if you have no upcoming activities



Starting an activity

- ▶ Tap **Start** next to an activity to begin providing responses, or **Continue** for an activity started earlier
- ▶ After providing a response, tap **Next** to go to the next question
- ▶ Tap **i** next to the question for more information about it (if provided by the research team)

11:41

Exit Last 24 Hours ?

4/15

*Pain

Not at all

A little bit

Quite a bit

Very much

Previous Next

9:00 AM

Exit Day 3 Questionnaire ?

8/8

*On a scale of 1 to 10, with 1 being the least and 10 being the worst pain imaginable, how severe were your symptoms today? ⓘ

ⓘ About this question ×

0 = No pain.
1 = Pain is very mild, barely noticeable.
2 = Minor pain. It's annoying.
3 = Noticeable pain. It may distract you, but you can get used to it.
4 = Moderate pain. If you are involved in an activity, you're able to ignore the pain for a while.
5 = Moderately strong pain. You can't ignore it for more than a few minutes.
6 = Moderately stronger pain. You avoid some of your normal daily activities. You have trouble concentrating.
7 = Strong pain. It keeps you from normal activities.
8 = Very strong pain. It's hard to do anything at all.
9 = Pain that is very hard to tolerate. You can't carry on a conversation.
10 = Worst pain possible.

0 3 10

Thanks for completing this questionnaire! Press **Finish** to submit it to the clinic team.

Previous Finish

Finishing an activity

- ▶ On the last question of the activity, tap **Finish** to submit your responses
- ▶ You'll be asked to confirm you are ready to submit. Tap **Yes** to confirm or **No** to return to the activity
- ▶ After you tap **Yes**, the activity is completed. You'll return to the Today page

Exit eDiary Day 1 ⓘ

9/9

Please take your temperature using the provided thermometer. Record your temperature here:

98.6 °F

Thanks for completing your eDiary! Press **Finish** below to submit it to the clinic team.

Previous Finish

1 2 3
4 5 6
7 8 9
0

Exit eDiary Day 1 ⓘ

9/9

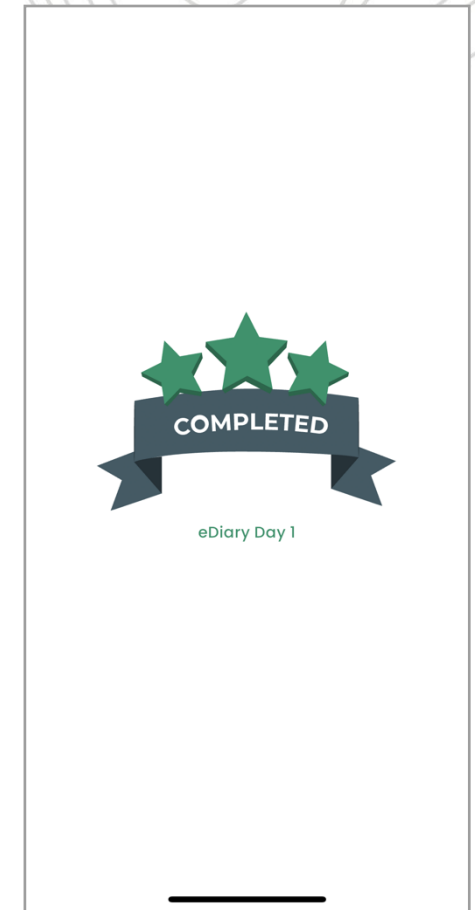
Please take your temperature using the provided thermometer. Record your temperature here:

98.6 °F

The be... h

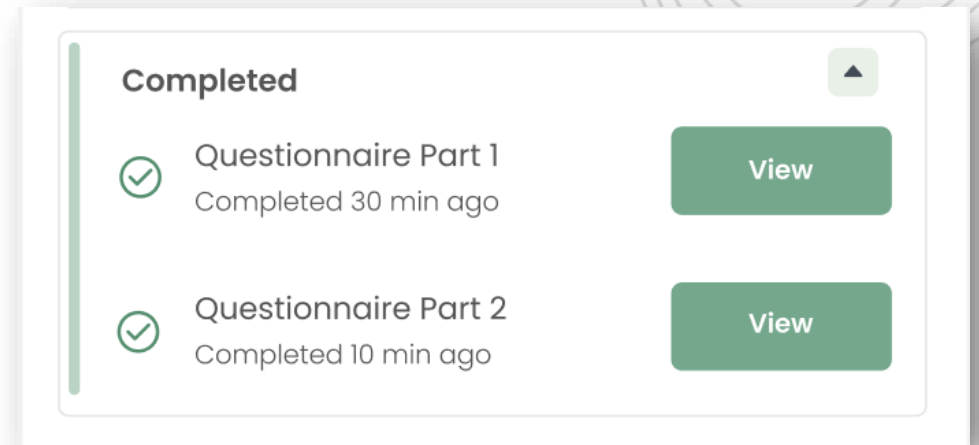
Ready to submit your responses?
No further changes will be possible.

No Yes



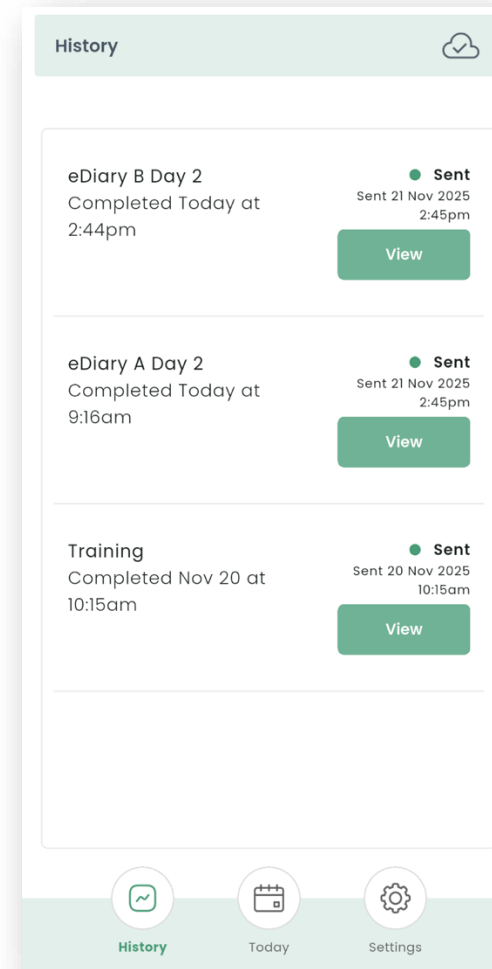
Completed activities

- ▶ Once you complete an activity, you'll see it in the **Completed** section for that day only
- ▶ All completed activities are listed on the History page
- ▶ Tap **View** to see your responses (online only, no changes allowed)
- ▶ This section is greyed out if you have no completed activities today

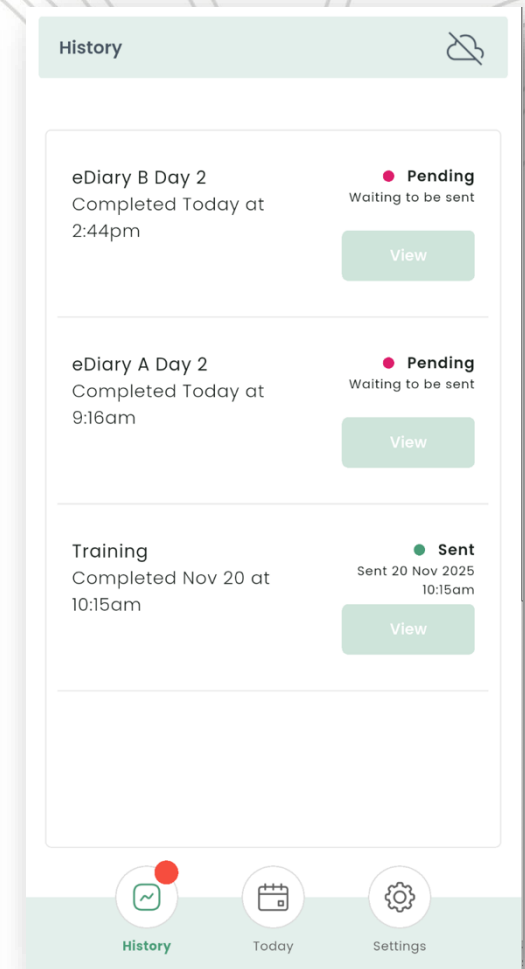


History & Pending activities

- ▶ History lists all your completed activities and their current sync status
- ▶ Tap **View** to see your responses (online only, no changes allowed)
- ▶ If activity is synced with server, it is **Sent**
- ▶ If activity is not yet synced with server (not available to the research team), it is **Pending**
 - ▶ DFengage will attempt to resend when the app is open and connected to internet
 - ▶ When online, tap cloud icon to sync manually
 - ▶ Red dot reminder on History button
- ▶ History is reset if you log out of DFengage



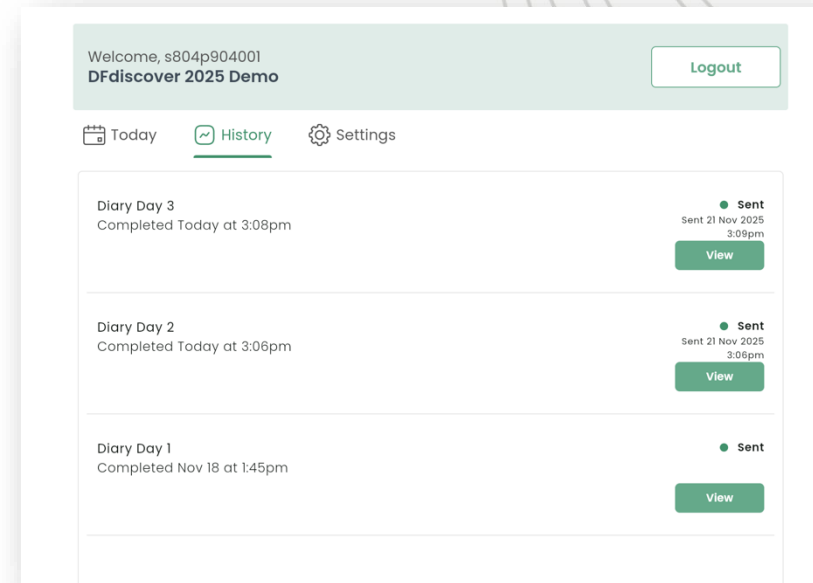
Online, 3 activities sent



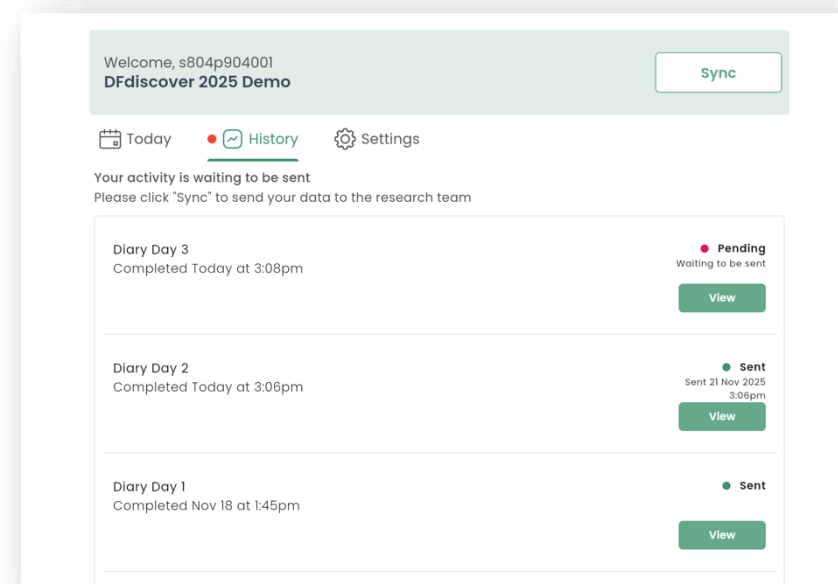
Offline, 2 activities pending

History & Pending activities

- ▶ History lists all your completed activities and their current sync status
- ▶ Tap **View** to see your completed responses (no changes allowed)
- ▶ If activity is synced with server, it is **Sent**
- ▶ If activity is not yet synced with server (not available to the research team), it is **Pending**
 - ▶ This may happen if data is in use by research team
 - ▶ Red dot reminder on History button & message: “Your activity is waiting to be sent”
 - ▶ Click **Sync** button to resend manually
 - ▶ Do not leave or logout without syncing



3 activities sent



1 pending activity, 2 activities sent

Logout

- ▶ When you are finished working in DFengage web, log out to close your session
- ▶ Click **Logout** in top right corner
- ▶ On smaller screens, go to the Settings page to log out
- ▶ If you are inactive for 20 minutes, you will be automatically logged out
- ▶ Logging out helps keep your data secure

The screenshot displays the DFdiscover Solutions user interface. At the top, a light green header bar contains the text "Welcome, s20p10007" and "DFdiscover Solutions" on the left, and a "Logout" button on the right. Below the header, there are navigation icons for "Today", "History", and "Settings". The main content area is titled "Today's Activities" and shows the date "20 Oct 2025". It is divided into three sections: "Overdue" (with a red bar on the left), "Due Now" (with a blue bar on the left), and "Upcoming" (with a light blue bar on the left). The "Overdue" section lists "eDiary (Day 1)" which is "9 hrs overdue" and has a "Start" button. The "Due Now" section lists "Morning Survey (Day 2)" and "eDiary (Day 2)", both with "Start" buttons. The "Upcoming" section lists "Afternoon Survey (Day 2)" available in 17 mins and "Evening Survey (Day 2)" available in 5 hrs. A "Completed" section is visible at the bottom but is currently empty.



Questions & Issues

For study participants

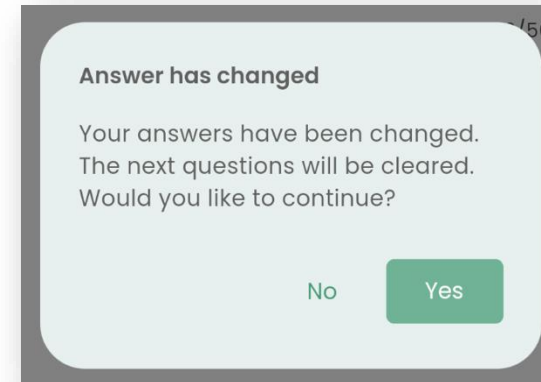
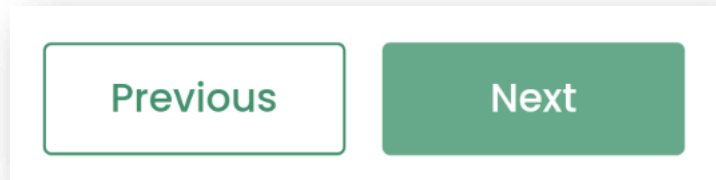
Can I stop halfway through an activity? *Yes*

- ▶ Complete activities in one sitting (unless otherwise instructed)
- ▶ However, responses are saved if you stop or exit mid-activity
 - ▶ On mobile, DFengage saves your progress to your device
 - ▶ On web, DFengage saves your progress until the end of your session (logout or close page)
- ▶ Click “Continue” on the Today page to return to the question where you exited
- ▶ If you logout of the app, you will lose any activities not yet finished and synced with the server



Can I change my responses? *Yes*

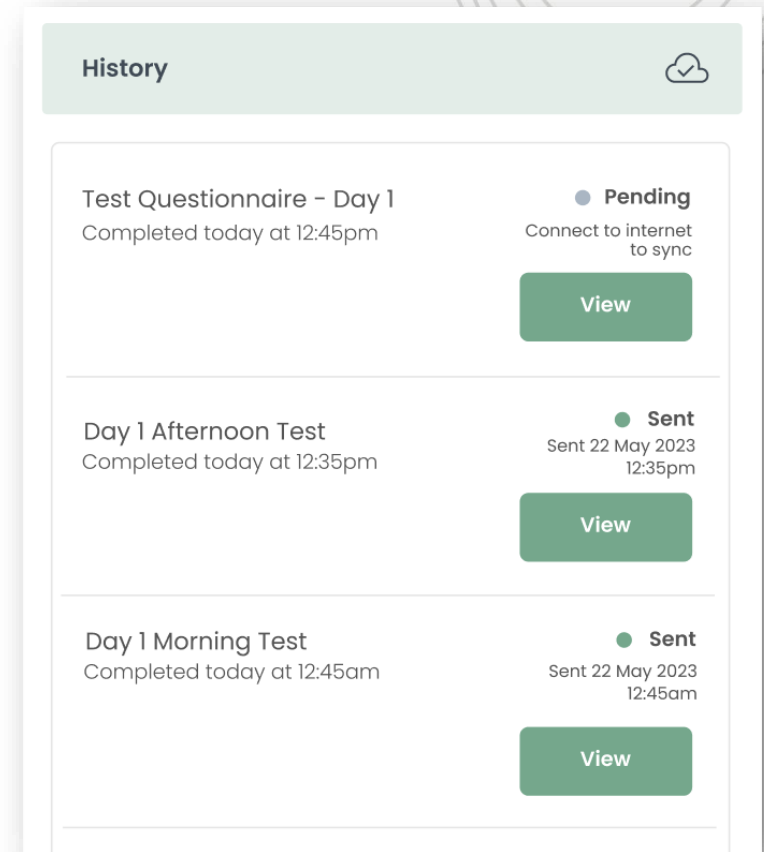
- ▶ Tap “Previous” to review responses:
- ▶ If you change a previous response:



- ▶ Once completed (“Finish”, then “Yes”), responses cannot be changed

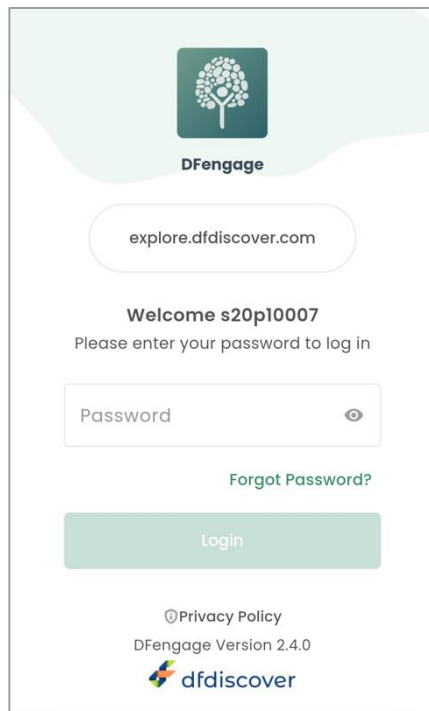
Can I see my responses to completed activities? Yes

- ▶ After tapping **Finish** and then **Yes** to submit the activity to the research team, the activity is complete
- ▶ Tap **View** on Today or History page to see your submitted responses, when online only
- ▶ If any changes were made after you submitted your responses, you will see those changes in DFengage
- ▶ Contact the research team with any questions or concerns



What if I forget my password?

1. Click **Forgot Password** below the password field



DFengage

explore.dfdiscover.com

Welcome s20p10007
Please enter your password to log in

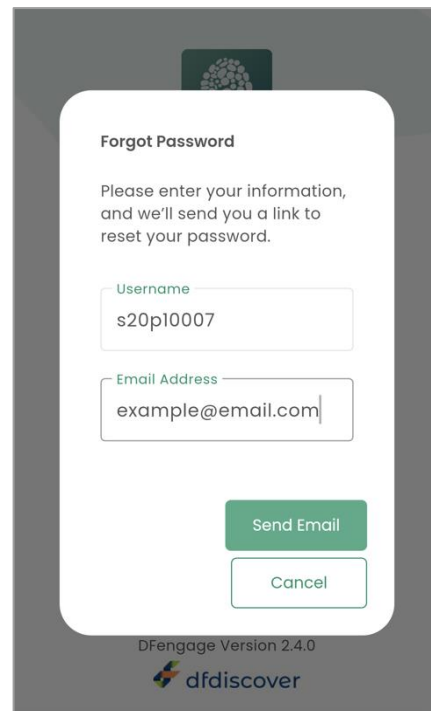
Password

Forgot Password?

Login

© Privacy Policy
DFengage Version 2.4.0
dfddiscover

2. Enter your username and email address, then click **Send Email**



Forgot Password

Please enter your information, and we'll send you a link to reset your password.

Username
s20p10007

Email Address
example@email.com

Send Email

Cancel

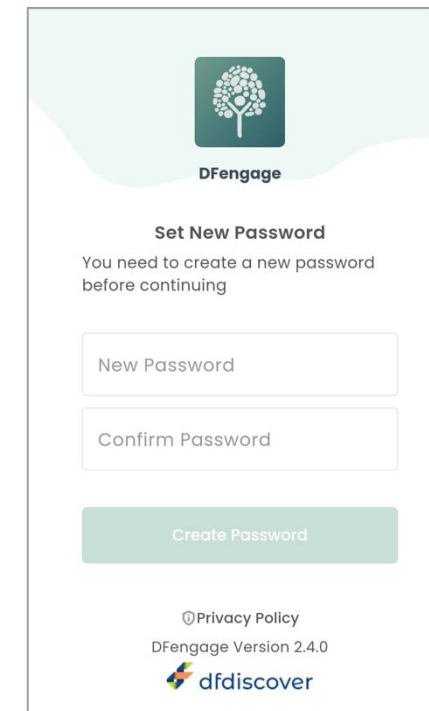
DFengage Version 2.4.0
dfddiscover

3. Find the email message **DFdiscover password reset** and click the link



- ▶ *Link expires after 30 minutes*
- ▶ *Requires the same browser & device as step 1-2*

4. Follow the instructions for setting a new password



DFengage

Set New Password

You need to create a new password before continuing

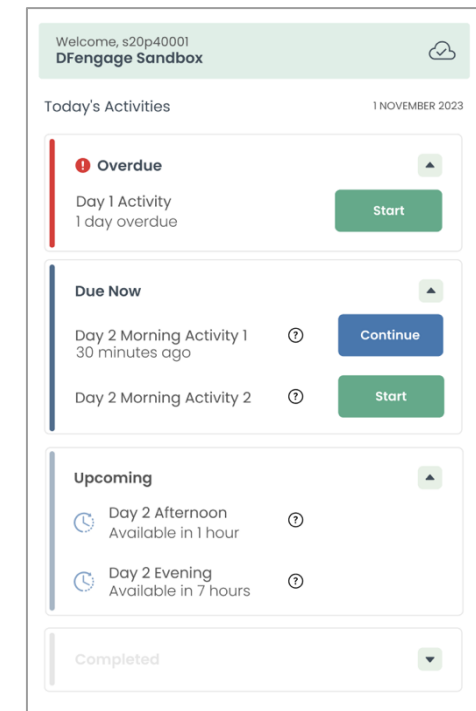
New Password

Confirm Password

Create Password

© Privacy Policy
DFengage Version 2.4.0
dfddiscover

5. Now you're logged in to DFengage



Welcome, s20p40001
DFengage Sandbox

Today's Activities 1 NOVEMBER 2023

Overdue

Day 1 Activity
1 day overdue Start

Due Now

Day 2 Morning Activity 1
30 minutes ago Continue

Day 2 Morning Activity 2 Start

Upcoming

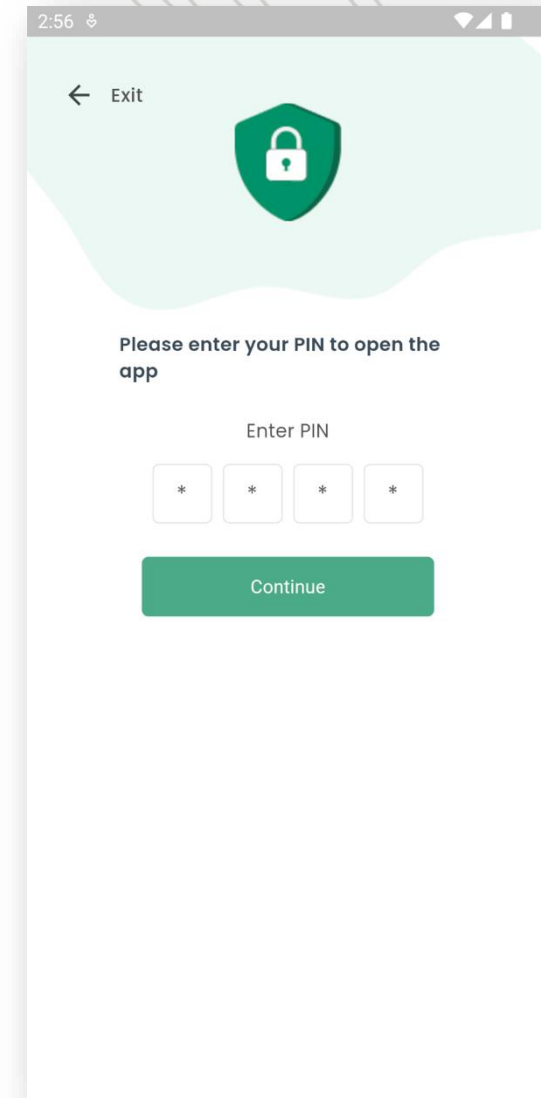
Day 2 Afternoon
Available in 1 hour Start

Day 2 Evening
Available in 7 hours Start

Completed

When do I need to use my PIN?

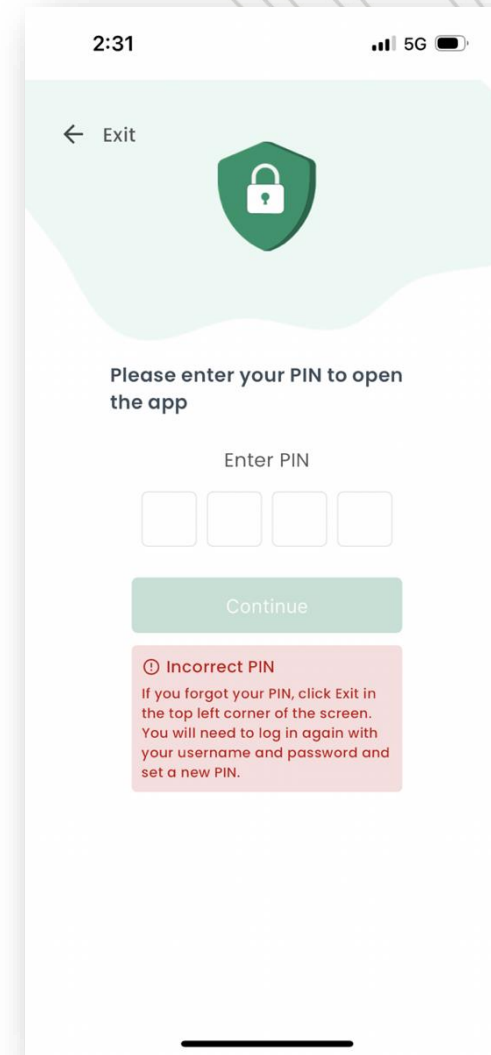
- ▶ Your PIN keeps the app secure on your device
- ▶ PIN is **required** when reopening the app after:
 - ▶ App is inactive for 20 minutes or longer
 - ▶ App is closed
- ▶ PIN is **not required** when reopening the app after:
 - ▶ App is inactive for less than 20 minutes
 - ▶ Device goes to sleep for less than 20 minutes
- ▶ If you exit this screen or log out:
 - ▶ Pending activities and activity history are deleted
 - ▶ You will need to login with your username and password and set a new PIN to continue using the app



What if I forget my PIN?

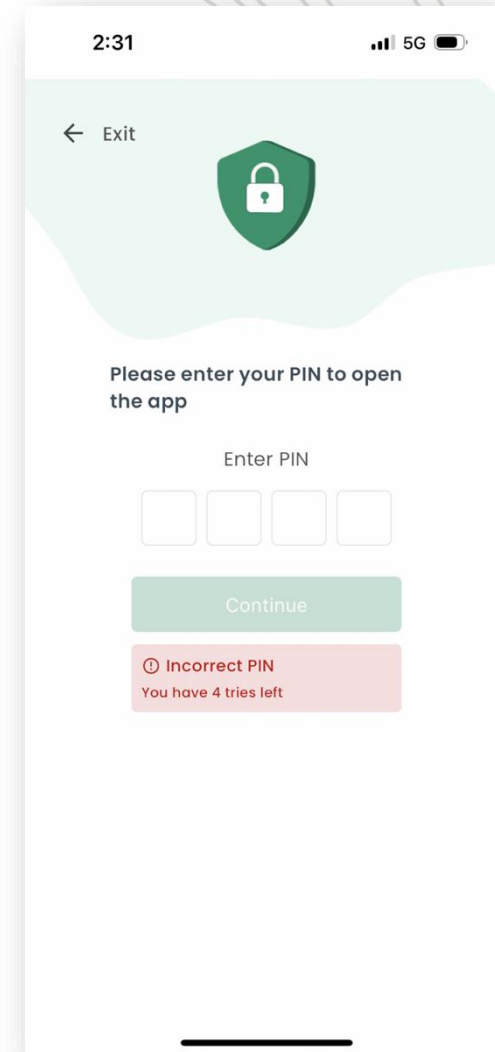
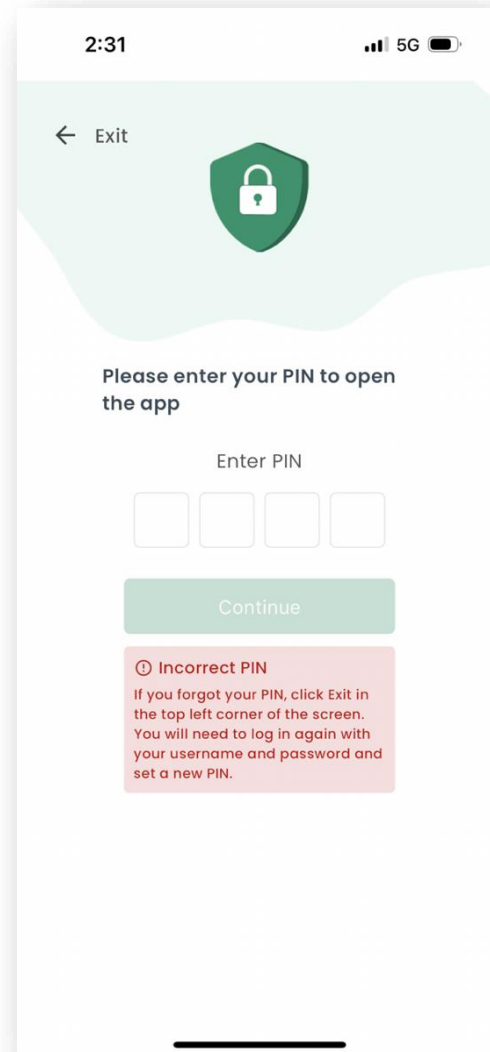
If you forgot your PIN and want to set a new one:

- ▶ First, make sure you don't have any unsynced data
- ▶ Click “Exit” to log out: All unsynced data (pending activities) and history will be deleted from your device
- ▶ You will need to login with your username and password and set a new PIN



Incorrect PIN 1st and 2nd attempts

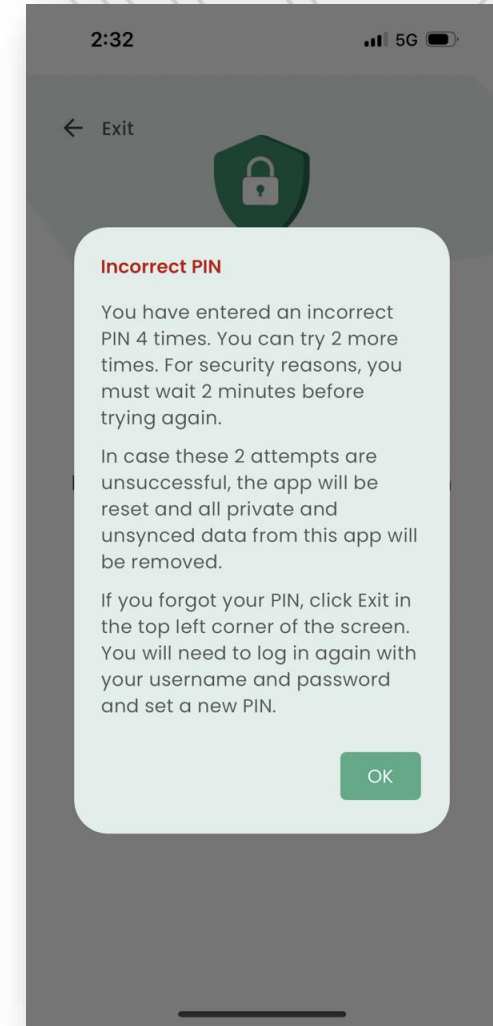
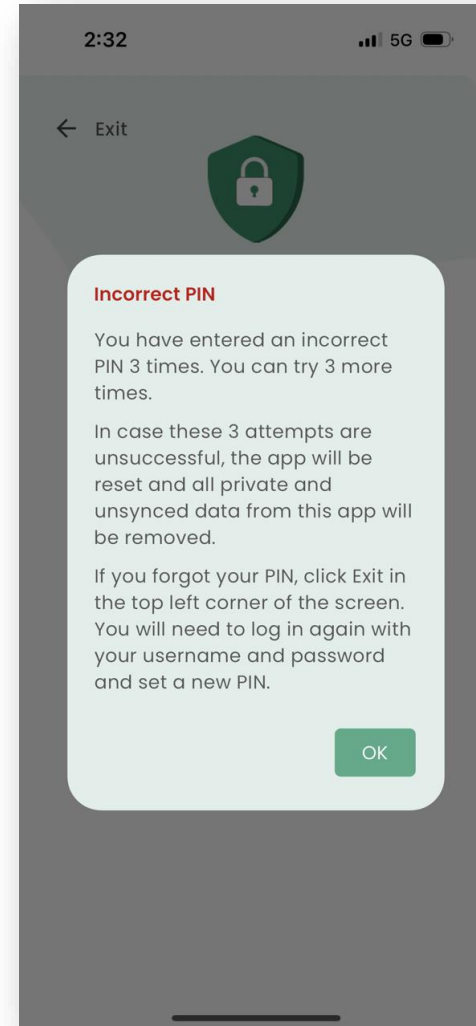
- ▶ You have a total of six attempts to enter the correct PIN
- ▶ First wrong attempt: Warning
- ▶ Second wrong attempt: Reminder about remaining attempts



Incorrect PIN

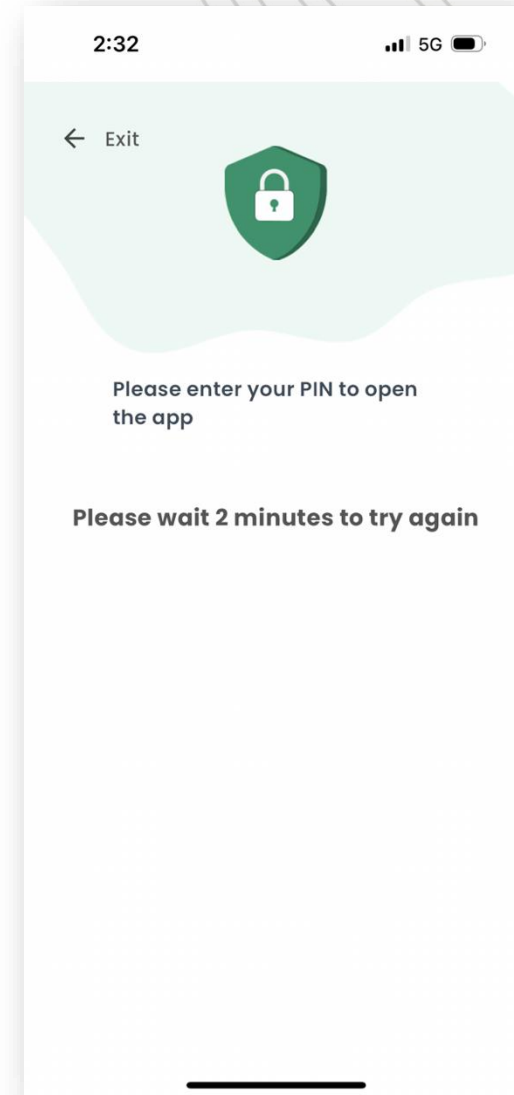
3rd and 4th attempts

- ▶ After third incorrect PIN, an additional warning is added
 - ▶ “Unsynced data will be deleted”
- ▶ After fourth incorrect PIN, you must **wait two minutes**
 - ▶ Slow down repeated attempts



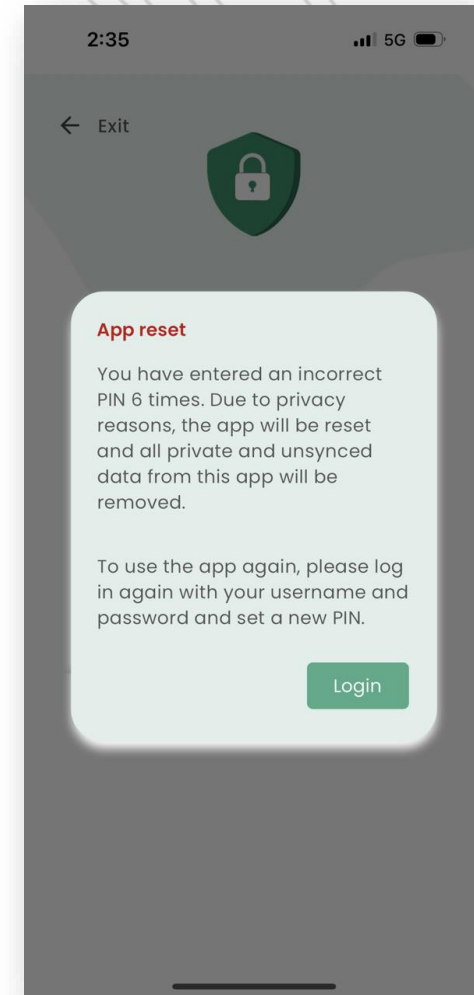
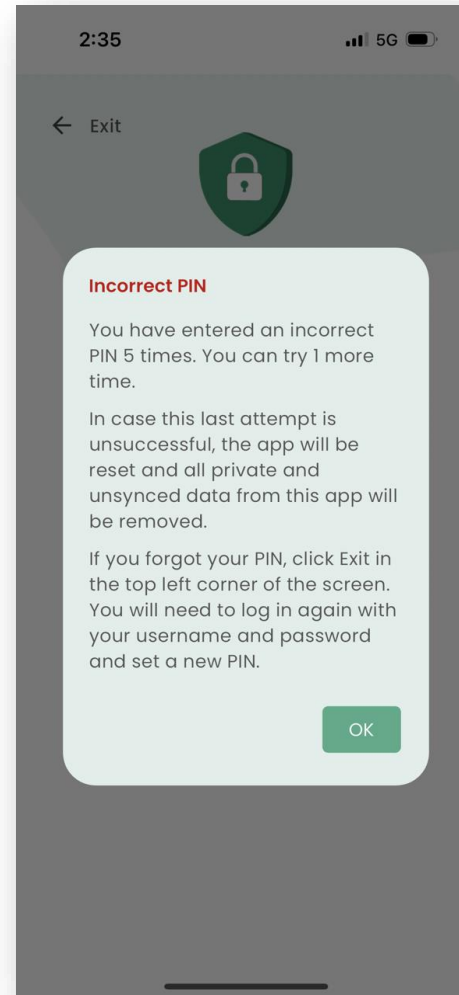
Incorrect PIN: 2-minute delay

- ▶ Why a time delay?
- ▶ Perhaps a child is playing with the device and tapping random numbers, or the app has opened accidentally in your pocket
- ▶ The time delay slows down the number of attempts



Incorrect PIN 5th and 6th attempts

- ▶ After fifth incorrect PIN, instructions given; one more attempt can be made
- ▶ After sixth wrong attempt, the app is **reset**
- ▶ Unsynced data and activity history are deleted
- ▶ Log in again with the same username and password, then set a new PIN



How is using a PIN secure?

- ▶ When you login and create a PIN, the app is empty (no data, no history)
- ▶ Any locally stored data is deleted after the sixth incorrect PIN
- ▶ If the phone stolen or lost, there is no app data in local storage
- ▶ Any new unauthorized user (thief, lost and found, new owner) would need to know your username and password to use DFengage

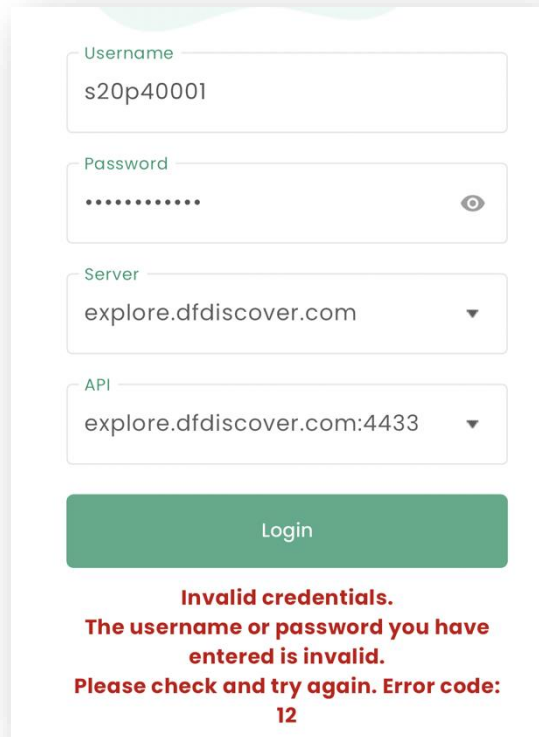
How many notifications will I receive?

- ▶ You will receive a notification on your device when:
 - ▶ A new activity becomes available
 - ▶ An activity becomes overdue when you haven't completed it when expected
- ▶ The research team determines how many notifications you receive and when you receive them
- ▶ Be sure to open DFengage when you receive a notification and complete your activities

What happens if my time zone changes?

- ▶ If you are travelling and the time zone on your device changes, notifications from DFengage will appear according to the old time zone until you open DFengage in your new time zone
- ▶ Once you open DFengage, it will recognize your new time zone
- ▶ Moving forward, DFengage will send notifications in your new time zone

Common messages – Login screen



Username
s20p40001

Password
.....

Server
explore.dfdiscover.com

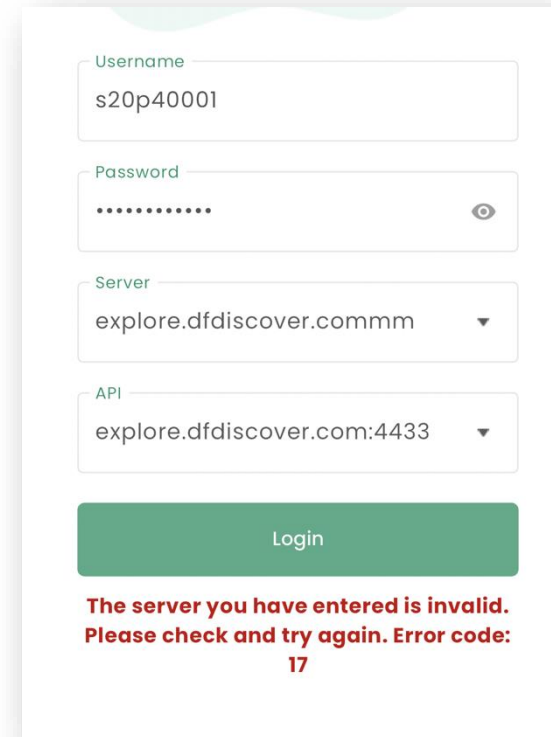
API
explore.dfdiscover.com:4433

Login

Invalid credentials.
The username or password you have entered is invalid.
Please check and try again. Error code:
12

Invalid credentials

Check if username and password are typed correctly



Username
s20p40001

Password
.....

Server
explore.dfdiscover.commm

API
explore.dfdiscover.com:4433

Login

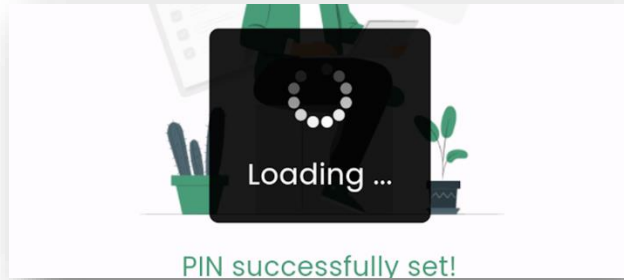
The server you have entered is invalid.
Please check and try again. Error code:
17

Server invalid

Check if server and API are typed correctly

Do not delete or uninstall app unless advised by the research team

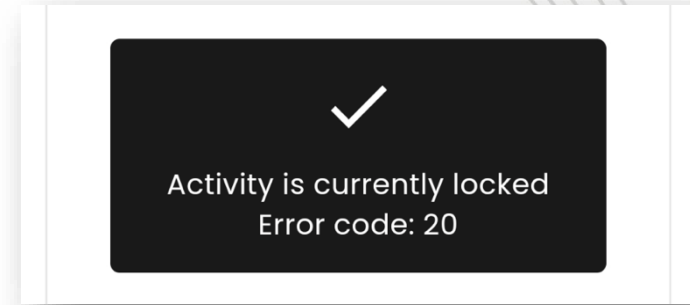
Common messages



Loading ...

The app is syncing with the server and updating your data.

This may take longer on a slow connection or during busy internet traffic times.



Activity is currently locked

Someone on the research team is reviewing your data, so the app can't sync with the server right now.

Your activity is saved on your device/browser, but it can't be saved to the server yet. Reopen the app later to try again (mobile) or wait a moment and press "Sync" to retry (web).

Do not delete or uninstall the mobile app unless advised by the research team

Troubleshooting for DFengage users

- ▶ Write down the error code, take a screenshot, and share with your study contact for help
- ▶ Avoid taking steps that delete any data that is not yet sent to the research team
- ▶ *On mobile:* **Do not uninstall or delete the app** or **log out of DFengage** unless informed by the research team
 - ▶ Any partial or pending activities will be deleted and your activity history will be removed
 - ▶ You will need to login again with username and password and set a new PIN
 - ▶ Instead, try closing or dismissing the app and reopening it to try again
- ▶ *On web:* **Do not log out of DFengage** or **refresh the page** or **close your browser** unless informed by the research team
 - ▶ Any partial or pending activities will be deleted (history of sent activities remain available)
 - ▶ Instead, contact the research team for help
 - ▶ Stay active on the page to avoid auto-logout after 20 minutes of inactivity



ePRO Management

For study teams

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

Available in DFdiscover 5.10 and later

The screenshot displays the 'ePRO Management' dashboard. At the top, it shows 'DFdiscover 2025 Demo' and 'Demo Account (demo)'. The main section is titled 'ePRO Management' with '5 Total Registered' participants. Below this, there are five status filters: Overdue (1), Due Now (1), Complete (1), Upcoming (1), and Inactive (5). A search bar is located on the right, set to 'Site 902 - Islandia H'. Below the filters, a table lists the participants with columns for Subject, Username, Status, Name, Contact, and Last Sync. Each row includes a 'View data >' link.

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 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



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 (mobile & web, mobile only, web only)
- ▶ 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

For more details, see:

[ePRO Management, DFweb User Guide](#)

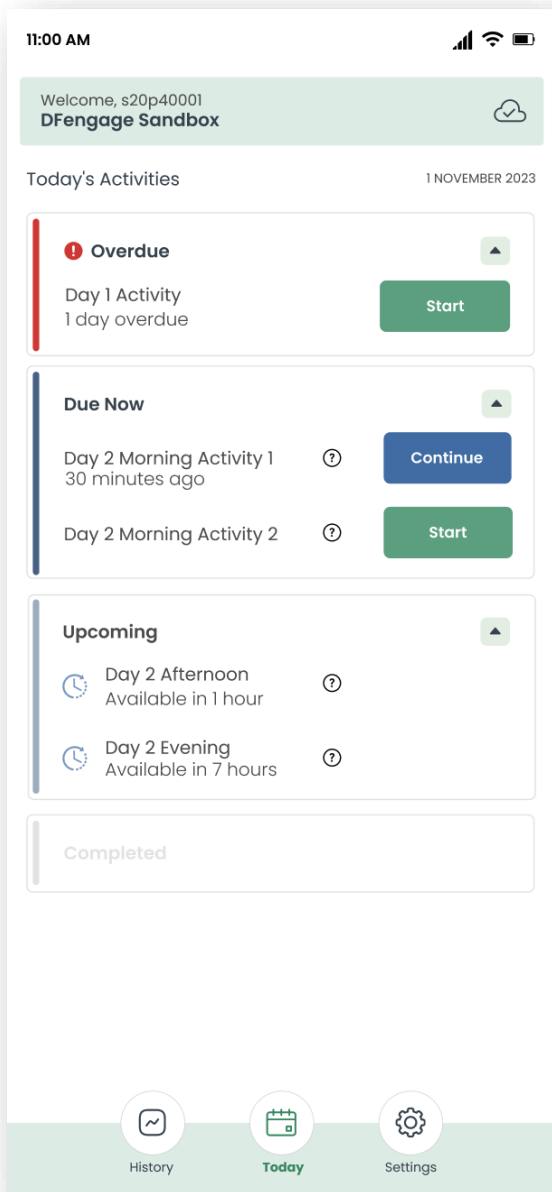
The screenshot displays the ePRO Management interface. At the top, it shows the DFdiscover logo, the version 'DFdiscover 2025 Demo', and a demo account link. The main section is titled 'ePRO Management' with a sub-header '5 Total Registered'. Below this, there are five status filters: Overdue (1), Due Now (1), Complete (1), Upcoming (1), and Inactive (5). A table below lists the subjects with columns for Subject, Username, Status, Name, Contact, and Last Sync. Each row includes a 'View data >' link.

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 >		



DFengage Setup

Considerations for DFsetup



DFsetup: Plates



- ▶ One DFdiscover plate = one DFengage activity
- ▶ ePRO plates can be set up with CRF backgrounds or as eCRFs
 - ▶ Barcoded CRF background only required if also collecting on paper forms for image-based data capture (back-up for ePRO and EDC)
- ▶ Consider how to organize activities & questions
 - ▶ Will too many questions in an activity result in missed activities?
 - ▶ Will too many daily activities overwhelm users?



DFsetup: Fields

- ▶ One data field (or field group) per screen
- ▶ Displayed in field order starting with field 8
 - ▶ Visit number (6) and subject ID (7) not displayed
- ▶ Prompt displayed as question text
 - ▶ If no prompt, description is displayed
- ▶ Prompt supports basic HTML formatting

Name	CMYN
<input checked="" type="checkbox"/> Alias	CMYN_FA
<input type="checkbox"/> Description	Medications to report
<input checked="" type="checkbox"/> Prompt	Did you take any medicines for one or more c

Did you take any medicines for one or more of your symptoms?



Did you take any medicines for one or more of your symptoms?

Yes

No

[Previous](#) [Next](#)



DFsetup: Data types

All DFdiscover data types are supported in DFengage:

- ▶ Date – any format that includes day, month, and year (no partial dates)
- ▶ Time – hh:mm only
- ▶ Number – any format
- ▶ VAS – horizontal & vertical
- ▶ Choice – list and dropdown
- ▶ Check – grouped (for multiple-choice) and ungrouped
- ▶ String – short and long text responses



DFsetup: Grouped fields

Group fields of any data type together to include them on a single screen

Did you take medication for any of these symptoms?

Yes

No

If yes, list the medication and dose taken:

Asprin 325mg

12/50

Did you take medication for any of these symptoms?		24
If yes, list the medication and dose taken:		
		25

Check the box next to each symptom you have experienced today:		14
		15
		16
		17
		18
		19

Check the box next to each symptom you have experienced today:

Nausea

Headache

Fatigue

Joint Aches

Muscle Aches

No Symptoms



DFsetup: Legal ranges

- ▶ If a value is entered outside the defined legal range:
 - ▶ Warning is displayed
 - ▶ User may continue to the next question
- ▶ Soft validation of illegal values to avoid data loss
- ▶ In DFexplore / DFweb / DFcollect, the value is illegal and the record is saved as incomplete

Configuration for the 'Age' field:

- Description: Age
- Prompt: What is your age?
- Basic | Detail | Edit checks | Custom
- Legal: 0-99

*What is your age? ⓘ

101

✗ The response you entered might be incorrect. Please double-check it before continuing.

Previous Next



DFsetup: Data format

- ▶ If format is not defined, characters allowed by data type are valid up to the store limit
- ▶ If format is defined, format guides are displayed in DFengage input field
- ▶ If participants must provide responses in specific format, include instructions to avoid confusion
- ▶ Warning displayed for invalid response according to defined format

Configuration for 'Temperature':

- Prompt
- Basic | **Detail** | Edit checks | Custom
- Display: 5
- Store: 5
- Format: [empty]
- Units

A blue arrow points from the 'Store' field to the right-hand side of the image.

*Temperature ⓘ

97.36

Celsius (°C)

Fahrenheit (°F)

Previous Next

Please take your temperature using the provided thermometer. Record your temperature here:

nnn.n °F

A blue arrow points down from this screen to the one below.

Please take your temperature using the provided thermometer. Record your temperature here:

99999 °F

ⓘ Please enter your response in the format nnn.n

Today's date

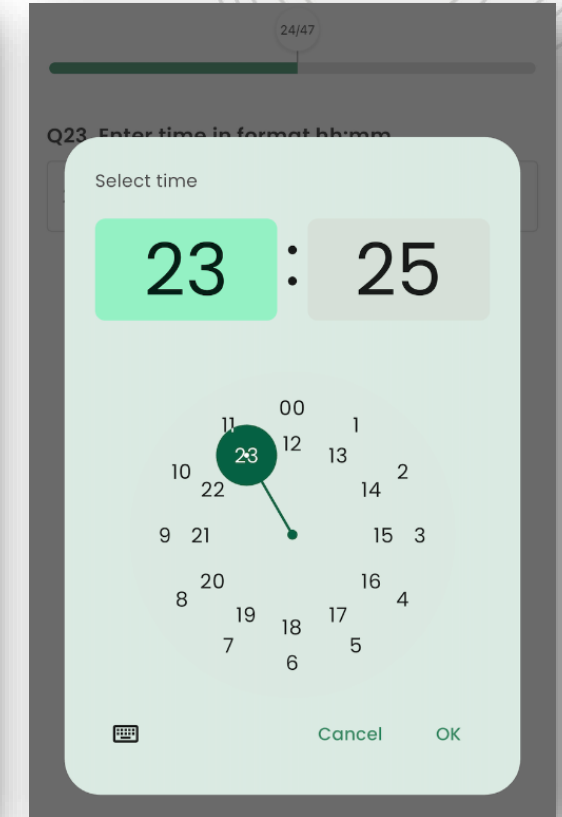
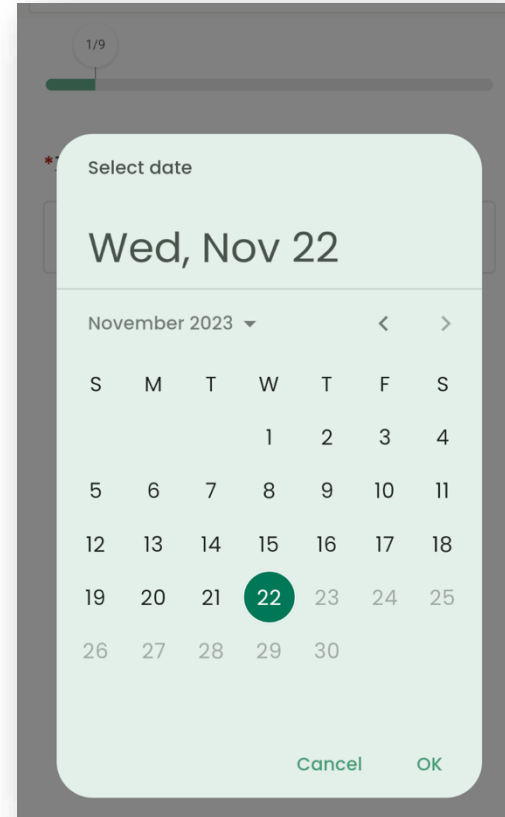
DD/MM/YYYY

Previous Next



DFsetup: Date and time fields

- ▶ All date formats that include day, month, and year are supported in DFengage (no partial dates)
- ▶ Time captures hh:mm 24-hr clock only
- ▶ Calendar and clock widgets used to select date and time
 - ▶ Default to current date and time
 - ▶ Participant can change if needed
- ▶ Legal ranges are supported
- ▶ Option to “Clear this value” if participant selects an optional response in error





DFsetup: Baseline visit date fields

- ▶ DFdiscover 5.7 and earlier: Baseline visit date(s) must be in **DD/MM/YYYY** format, e.g.: `28/02/2021`
- ▶ DFdiscover 5.8 and later: Baseline visit date may be in **any format** when connecting to DFdiscover 5.8 and later



DFsetup: Choice and check fields

- ▶ Single-choice:
 - ▶ Choice data type for all options
 - ▶ Up to 98 options per question
 - ▶ Option to “Clear this value” if participant selects an optional response in error
- ▶ Multiple-choice:
 - ▶ Check data type for each option
 - ▶ Grouped to display as a single question
 - ▶ No limit to number of options
- ▶ Both single-choice and multiple-choice options are displayed with circles
- ▶ In the field prompt or instructions, include text such as “check all that apply” where necessary

Lifting or carrying groceries? ⓘ

Yes, limited a lot

Yes, limited a little

No, not limited at all

[Previous](#) [Next](#)

What symptoms do you have right now? ⓘ

Select as many symptoms as needed.

Headache

Nausea

Fatigue

Joint Aches

Muscle Aches

[Previous](#) [Next](#)



DFengage: Choice field dropdown

Single-choice fields may be displayed as dropdown instead of choice list

Show As Drop-down

<input checked="" type="checkbox"/>		Code	Label	b Lat
	No Choice	0		
	Choice 1	1	Much better now than one y...	
	Choice 2	2	Somewhat better now than ...	
	Choice 3	3	About the same	
	Choice 4	4	Somewhat worse than one ...	
	Choice 5	5	Much worse than one year ...	

Compared to one year ago, how would you rate your health in general now?

Previous

Next

Compared to one year ago, how would you rate your health in general now?

Much better now than one year ago

Somewhat better now than one year ago

About the same

Somewhat worse than one year ago

Much worse than one year ago



DFsetup: Number fields

- ▶ Input field is restricted based on format (if defined) and store field properties
- ▶ Input field displays format guide, if defined
- ▶ Warning displayed if illegal or invalid value is entered

Redness: Diameter in cm ⓘ

*What is your age? ⓘ

✗ The response you entered might be incorrect.
Please double-check it before continuing.

Previous Next

*What is your age?

✗ Please enter your response in the format



DFsetup: VAS fields

- ▶ Define left and right value along with precision as needed to allow for decimal places
- ▶ Consider VAS instead of number fields to fully restrict entry to a range of values
- ▶ VAS default: horizontal scale, left and right values displayed on the scale
- ▶ VAS customization using custom properties available from version 2.2

Field Properties

Style SimpleVAS Type VAS

Name QSORRES_v

Alias TEMP_QSORRES

Description Temperature

Prompt What is your body temperature (°F)

Basic **Detail** Edit checks Custom

Units

Precision 0

Left Value 90

Right Value 112

What is your body temperature (°F)

90 112

98

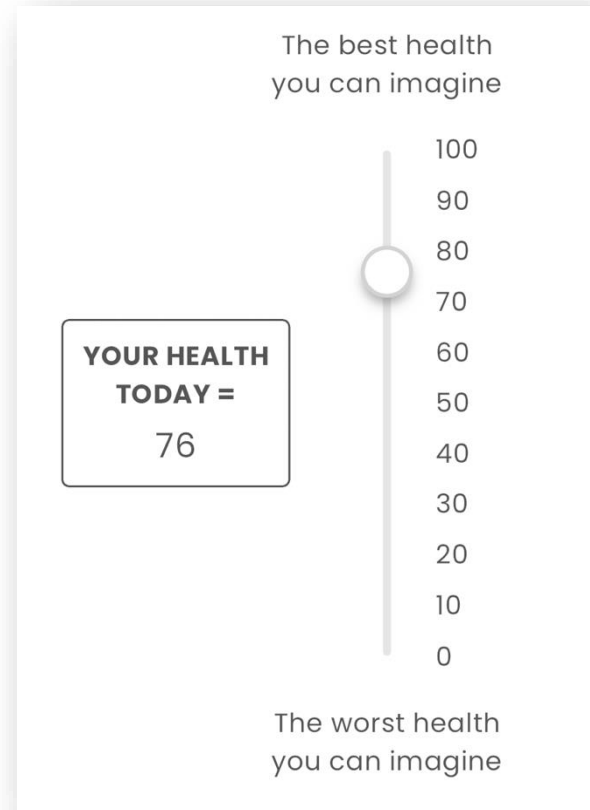
Clear this value

Previous Next



DFsetup: VAS customizations – Vertical scale

- ▶ Display VAS vertically instead of horizontally
- ▶ Use custom field property **ePRO_VAS_Layout** value of **Vertical**
- ▶ Left value on bottom, right value on top
- ▶ Affects DFengage only



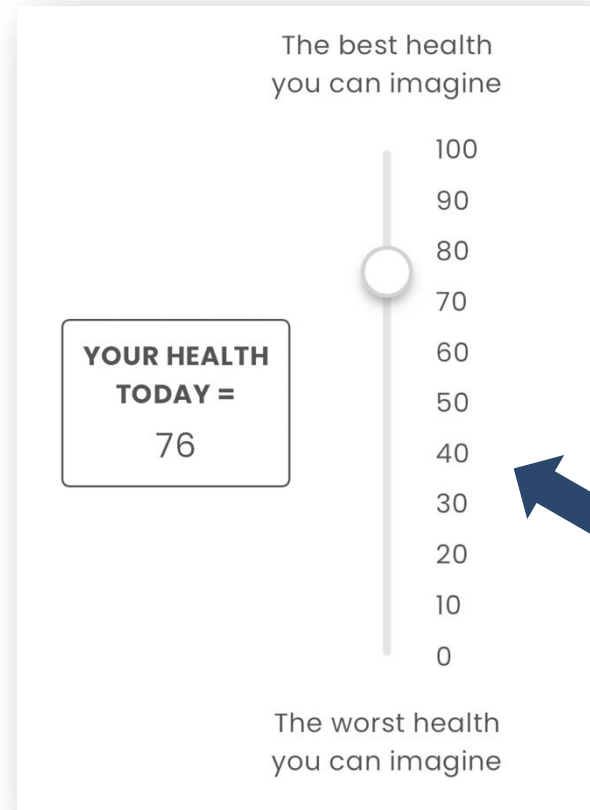
ePRO_VAS_Layout	Vertical
ePRO_VAS_ShowEveryXValues	10
ePRO_VAS_RightText	<p style="te
ePRO_VAS_LeftText	<p style="te
ePRO_VAS_CurrentText	<p style="te

DFsetup field-level custom properties



DFsetup: VAS customizations – Additional values

- ▶ Display additional values on the scale
- ▶ Use custom field property **ePRO_VAS_ShowEveryXValues** to indicate the increment of values to display
- ▶ If specified values do not fit, only the middle value is shown



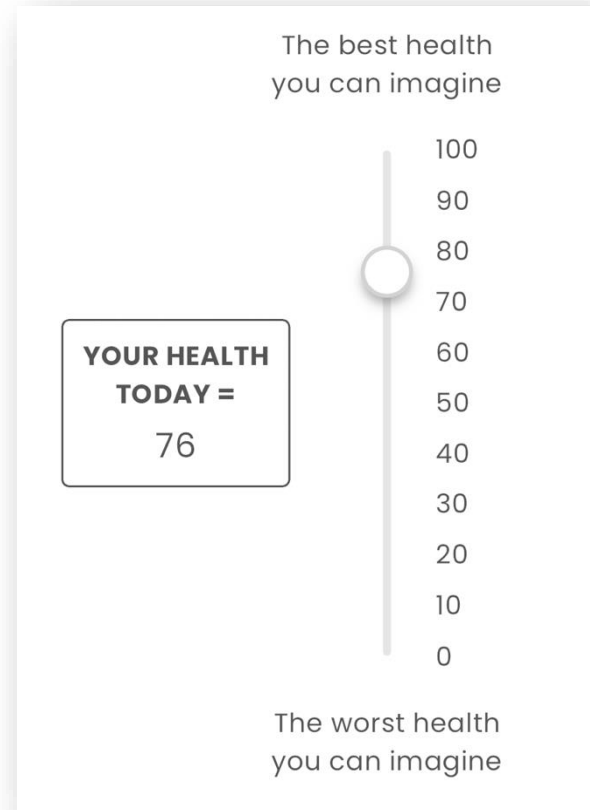
ePRO_VAS_Layout	Vertical
ePRO_VAS_ShowEveryXValues	10
ePRO_VAS_RightText	<p style="te
ePRO_VAS_LeftText	<p style="te
ePRO_VAS_CurrentText	<p style="te

DFsetup field-level custom properties



DFsetup: VAS customizations – Labels (vertical)

- ▶ Add labels to left, right, and current values
- ▶ Use custom field properties:
 - ▶ **ePRO_VAS_RightText**
 - ▶ **ePRO_VAS_LeftText**
 - ▶ **ePRO_VAS_CurrentText**
- ▶ Text aligns left by default; line breaks added automatically
- ▶ Use HTML to add alignment, line breaks, and basic formatting



ePRO_HideField	
ePRO_VAS_Layout	Vertical
ePRO_VAS_ShowEveryX...	10
ePRO_VAS_RightText	<p style="text-align:center">The best health you can imagine</p>
ePRO_VAS_LeftText	<p style="text-align:center">The worst health you can imagine</p>
ePRO_VAS_CurrentText	<p style="text-align:center">YOUR HEALTH TODAY =</p>

DFsetup field-level custom properties



DFsetup: VAS customizations – Labels (horizontal)

- ▶ Add labels to left, right, and current values
- ▶ Use custom field properties:
 - ▶ **ePRO_VAS_RightText**
 - ▶ **ePRO_VAS_LeftText**
 - ▶ **ePRO_VAS_CurrentText**
- ▶ Text aligns left by default; line breaks added automatically
- ▶ Use HTML to add alignment, line breaks, and basic formatting

*On a scale of 1 to 10, how severe were your symptoms today?

Least pain Worst pain imaginable

1 10

Symptom Severity:
3

ePRO_VAS_RightText	<p style="text-align:right">Worst pain imaginable</p>
ePRO_VAS_LeftText	<p style="text-align:left">Least pain</p>
ePRO_VAS_CurrentText	<p style="text-align:center">Symptom Severity:</p>



DFsetup: VAS customizations – Labels (horizontal)

- ▶ By default, left and right labels are displayed above the scale
- ▶ Optionally display the labels below the scale
- ▶ Use custom field property **ePRO_VAS_LeftRightTextPosition** value of **Below**

In the past 7 days

How would you rate your pain on average?



0 1 2 3 4 5 6 7 8 9 10

No pain Worst pain imaginable

3

A horizontal slider scale from 0 to 10. The slider is positioned at 3. Below the scale, the text 'No pain' is on the left and 'Worst pain imaginable' is on the right. A box containing the number '3' is centered below the scale.

ePRO_VAS_ShowEveryXValues	1
ePRO_VAS_RightText	Worst pain imaginable
ePRO_VAS_LeftText	No pain
ePRO_VAS_CurrentText	
ePRO_VAS_LeftRightTextPosition	Below



DFsetup: String fields

- ▶ Character limit (store length) is displayed at bottom right of input field
- ▶ Count is updated as data is entered
- ▶ Participant cannot continue typing when limit is reached

List medication and dose taken for itching:

0/50

Previous Next


List medication and dose taken for itching:

50/50

Previous Next



DFsetup: Required and essential fields

Need Required 

Need Essential 

- ▶ In DFengage, required and essential fields are marked with red asterisk (*)
- ▶ **Next** button is disabled until response is provided
- ▶ Participant cannot proceed until they answer the question
- ▶ “This field requires a response” warning appears if participant enters and then deletes their response

*Pain

Not at all

A little bit

Quite a bit

Very much

Previous **Next**

*Pain

Not at all

A little bit

Quite a bit

Very much

Previous **Next**

*On a scale of 1 to 10, with 1 being the least and 10 being the worst pain imaginable, how severe were your symptoms today?

0 10

Clear this value

X This field requires a response.

Previous Next

DFsetup: Skip pattern logic



3:28 5G

Exit Day 1: Daily questions ?

16/17

*Have you observed any new symptoms?

Yes

No

Previous **Next**

In this example, if yes, then “Next” brings you to question #17

3:28 5G

Exit Day 1: Daily questions ?

16/17

*Have you observed any new symptoms?

Yes

No

Previous **Finish**

If no, then “Finish.” Question #17 will be skipped



DFsetup: Skip patterns with grouped fields

- ▶ Fields within a group now count as separate fields as in DFexplore/DFweb (previously a group was counted as one field)
- ▶ Example: Field 9 is “No symptoms” check type. If no symptoms = 1, then end of form
 - ▶ Field 9: skip 8 fields if value = 1
- ▶ If multiple skips within a group, the last skip determines next question
 - ▶ Skip patterns are checked in reverse order from last (highest field #) to first (lowest field #) within a group

Check the box next to each symptom you have experienced this week:	9
	10
	11
	12
	13
	14
On a scale of 1 to 10, with 1 being the least and 10 being the worst pain imaginable, how severe were your symptoms today?	15
Did you take medication for any of these symptoms?	16
If yes, list the medication and dose taken:	
	17

Skip 8 fields if value= 1

Exit Weekly Survey ?

2/4

Check the box next to each symptom you have experienced this week:

No Symptoms

Nausea

Headache

Fatigue

Joint Aches

Muscle Aches

Previous Finish

NEW IN 2.2

DFsetup: Text-only screens

- ▶ Need to have a screen with text only, no question to answer?
- ▶ Use custom field property **ePRO_HideField** value of **Yes**
- ▶ Field input area is hidden, but prompt, instructions, and footnote are displayed
- ▶ Affects DFengage only



2/9

 **EQ-5D-5L**

Health Questionnaire

English version for the USA

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[Previous](#) [Next](#)

Basic	Detail	Edit checks	Custom
Property Tag	Property Value		
ePRO_HideField	Yes		
ePRO_VAS_Layout			
ePRO_VAS_LeftText			
ePRO_VAS_RightText			



DFsetup: View-only hidden fields



- ▶ Capture hidden, view only fields:
 - ▶ **Language** to capture user's study language
 - ▶ **Local creation timestamp** to captures user's local time with UTC offset
- ▶ Defined via Use property or using built-in ViewOnly module
- ▶ Fields are always hidden in DFengage and auto-completed when the activity is completed
- ▶ Data values shown in EDC tools

DFsetup - Modules

Module List

Modules-Fields

- > eSignature
- ▼ ViewOnly
 - ▲ DFLCREATE
 - ▲ DFLLANG
 - ▲ DFLMODIFY

Field Properties

Style Type

Name Name DFLCREATE

Alias Alias DFLCREATE

Description

Prompt

Basic **Detail** Edit checks

Store

Format

Use

Mapping

CRF Language	English
Local Creation Timestamp	2024-09-29 17:06:01 UTC-04:00
Local Modify Timestamp	2024-09-29 17:06:37 UTC-04:00



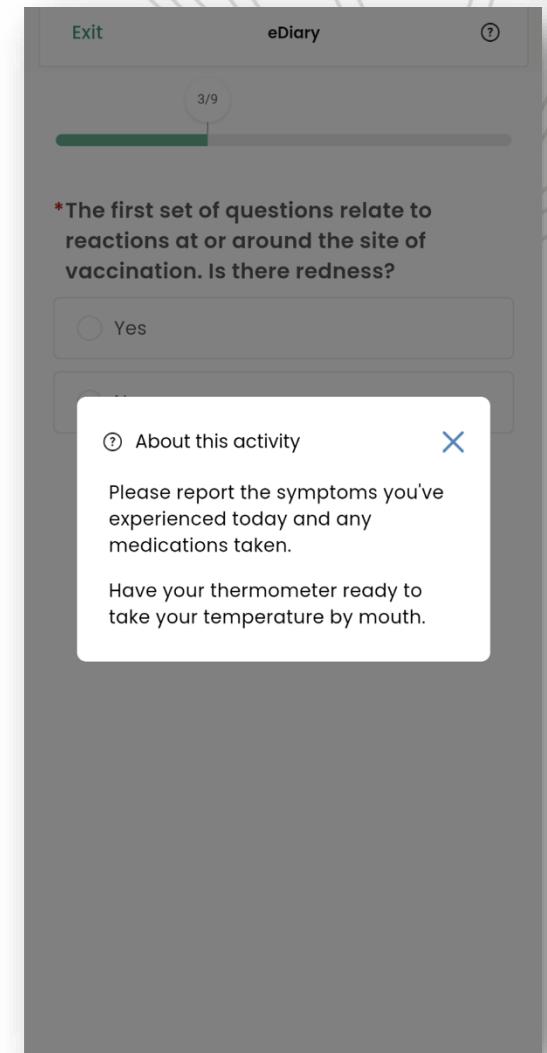
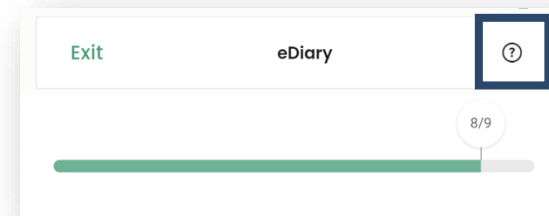
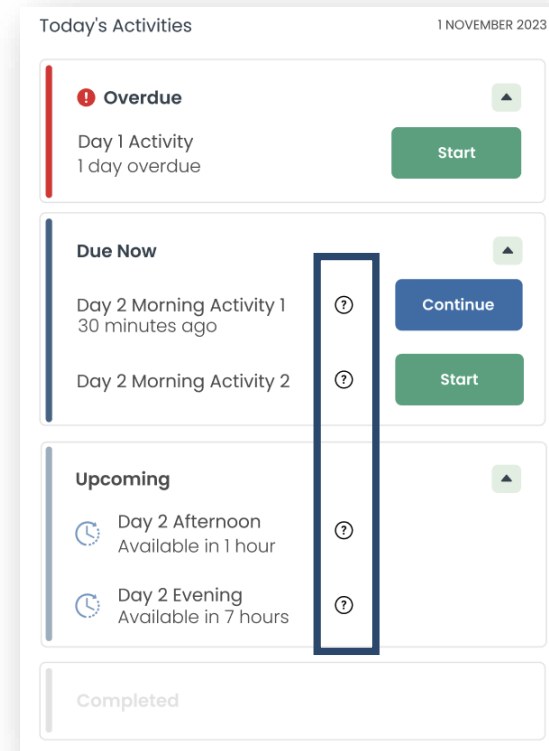
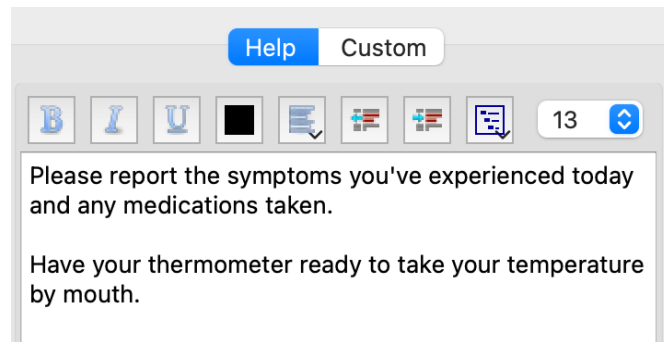
DFsetup: Hidden, masked, constant fields

- ▶ Hidden fields are shown or hidden based on role permissions
 - ▶ Recommended: Disable “Show Hidden fields” in ePROdata role permissions
 - ▶ Limit use of hidden fields for non-ePRO fields (e.g., expiry, translations of text fields, etc.)
- ▶ Masked fields are blank, read only, and covered with grey box
 - ▶ **Not recommended for DFengage**
- ▶ Constant fields are displayed and read only
 - ▶ **Not recommended for DFengage**



DFsetup: Plate help

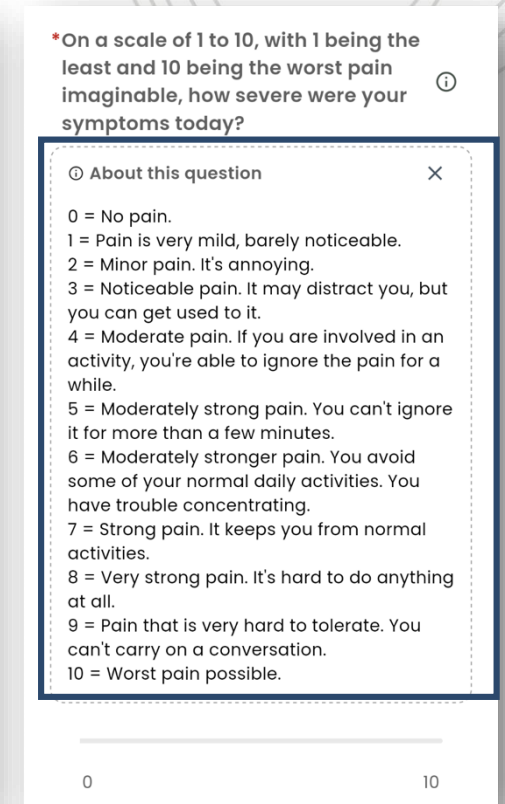
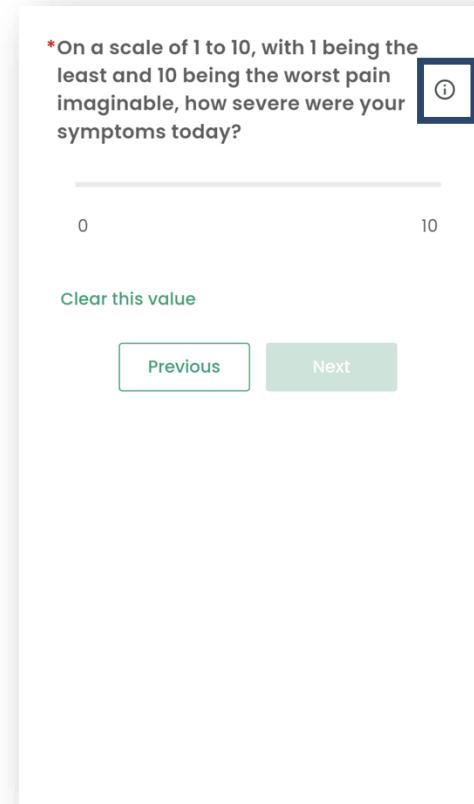
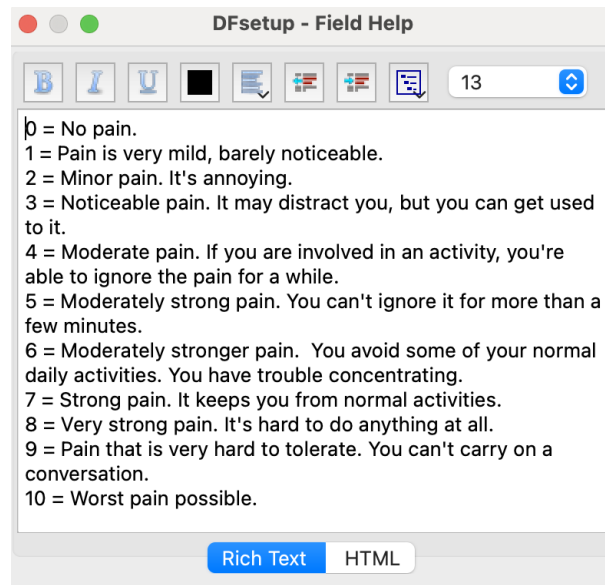
- ▶ Define **Help** in DFsetup plate properties to provide additional information about an activity
- ▶ Accessed in DFengage via “?” icon on Today page and on each screen within an activity





DFsetup: Field help

- ▶ Define **Help** in DFsetup field properties to provide additional information about a question
- ▶ Accessed in DFengage via “i” icon next to field prompt, shown on-screen below prompt





DFsetup: Field instructions

- ▶ Use field instructions to add on-screen text in addition to field prompt
- ▶ Displayed according to defined position
 - ▶ Above prompt and above field displayed as described
 - ▶ Field right/Below field/Below prompt are all displayed below DFengage input field
- ▶ Basic HTML formatting supported

☑ Instruction Below Field

Thanks for completing your eDiary! Press **Finish** below to submit it to the clinic team.



Thanks for completing your eDiary! Press **Finish** below to submit it to the clinic team.

Previous Finish

☑ Instruction Above Field

If yes, list the medication and dose taken:



Did you take medication for any of these symptoms?

Yes

No

If yes, list the medication and dose taken:

Asprin 325mg

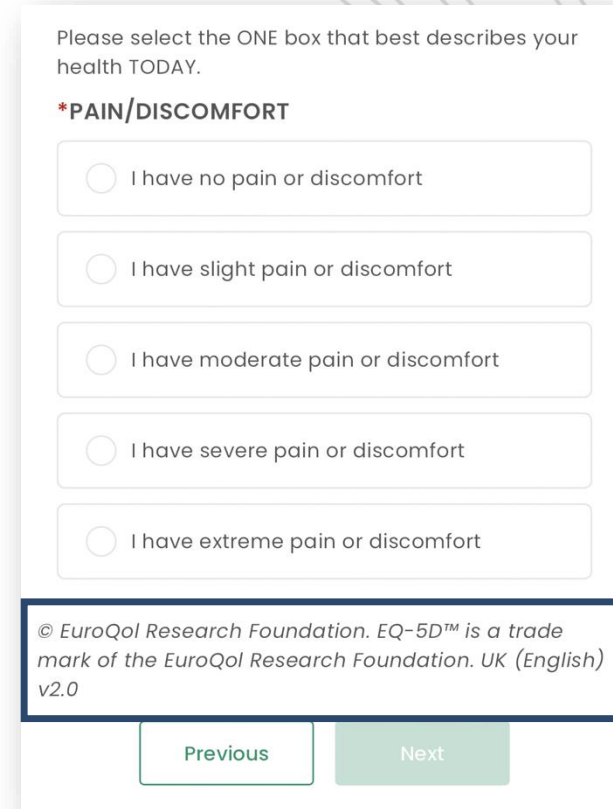
12/50

DFsetup: Plate footnotes

- ▶ Plate footnotes are displayed at the bottom of every screen for an activity
- ▶ Use custom plate property **ePRO_Footer**
- ▶ Basic HTML formatting supported

Property Tag	Property Value
ePRO_Footer	<em style="text-align:center">© EuroQol Research Foundation. EQ-5D™ is a trade mark of the EuroQol Research Foundation. UK (English) v2.0
DFPLATE_USER2	
DFPLATE_USER3	

DFsetup plate-level custom properties



Please select the ONE box that best describes your health TODAY.

***PAIN/DISCOMFORT**

I have no pain or discomfort

I have slight pain or discomfort

I have moderate pain or discomfort

I have severe pain or discomfort

I have extreme pain or discomfort

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Previous Next





DFsetup: Visit Map in **DFdiscover 5.7** and earlier

- ▶ Visit types “S” and “T” are currently the only visit types available in DFengage with DFdiscover 5.7 or earlier
 - ▶ Plates must be required
- ▶ Schedule from baseline visit (visit date must be in DD/MM/YYYY format)
 - ▶ If using a different date format, use an edit check to autofill the date to a hidden visit date field in DD/MM/YYYY format
- ▶ Consider creating separate visits for DFengage (optional)
- ▶ Current release supports multiple cycles
- ▶ Current release does not support termination dates, missed visit plates, or conditional cycles, visits, plates, or termination

Type	Number	Acronym	Label	Due	Overdue
C	1		Study Cycle	0	0
B	100	ENR	Enrollment	0	0
S	1	D1	Day 1 (ePRO)	1	0
S	2	D2	Day 2 (ePRO)	2	0
S	3	D3	Day 3 (ePRO)	3	0
S	4	D4	Day 4 (ePRO)	4	0
S	5	D5	Day 5 (ePRO)	5	0
S	6	D6	Day 6 (ePRO)	6	0
S	7	D7	Day 7 (ePRO)	7	0
S	140	D14	Day 14 (Clinic)	14	1

Visit or Cycle Definition

Type: Visit Cycle

S: Scheduled

Visit Date Field: Plate 21, field 8=Date

Visit Scheduling: Visit is due 1 days after baseline, Visit is overdue when 0 days late

Plates: Required 20,21,22

Optional

Display Order

Missed Visit



DFsetup: Visit Map in **DFdiscover 5.8** and later

- ▶ All visit types and conditional maps are supported in DFengage as of DFdiscover 5.8
- ▶ Any visit that is required and has a Schedule Date in the **Cycle Visits** report is available for completion in DFengage
 - ▶ New in 2.4: Includes repeating forms (using visit number range)
 - ▶ Requires role permissions that allow visit date calculations
- ▶ Only required plates at required and scheduled visits are available in DFengage
 - ▶ Optional visits and optional plates are not available in DFengage
- ▶ Activity schedule is loaded at the start of a session or activity
 - ▶ Conditional changes to plates, visits, cycles, or termination are updated when each activity is completed
 - ▶ If the participant starts an activity and exits before finishing, setup and permissions are the same when they continue
- ▶ Baseline visit dates may use any date format (DD/MM/YYYY format no longer required)

Type	Number	Acronym	Label	Due	Overdue
C	1		Study Cycle	0	0
B	100	ENR	Enrollment	0	0
S	1	D1	Day 1 (ePRO)	1	0
S	2	D2	Day 2 (ePRO)	2	0
S	3	D3	Day 3 (ePRO)	3	0
S	4	D4	Day 4 (ePRO)	4	0
S	5	D5	Day 5 (ePRO)	5	0
S	6	D6	Day 6 (ePRO)	6	0
S	7	D7	Day 7 (ePRO)	7	0
S	140	D14	Day 14 (Clinic)	14	1

Visit or Cycle Definition

Type: Visit Cycle

S: Scheduled

Visit Date Field: Plate 21, field 8=Date

Visit Scheduling: Visit is due 1 days after baseline

Visit is overdue when 0 days late

Plates: Required 20,21,22

Optional

Display Order

Missed Visit



DFsetup: Custom Timing – Visit

- ▶ Customize the visit-specific timing of activity availability & notifications by adding timing notation to the visit label
- ▶ Required format: **T-XX:XX** where XX:XX is the 24-hour clock time
- ▶ Must be placed at the end of the visit label (no characters after it)
- ▶ If visit timing is not defined for a visit, custom study timing is used (see previous slide); otherwise, default 8:00 timing is used

Visit Map

C	2		ePRO Cycle
B	40	INJ	Study Injection
S	41	ED1-1	eDiary Day 1 T-12:00
S	400	ED1-2	eDiary Day 1 T-18:00
S	42	ED2	eDiary Day 2 T-9:00
T	43	ED3	eDiary Day 3 T-9:00



DFsetup: Notifications in **DFdiscover 5.11** and later

- ▶ View > ePRO Notifications
- ▶ For new studies using DFengage, or those upgrading to DFdiscover Version 5.11.0 or later with ongoing DFengage mobile data collection
 - ▶ The ePRO configurations **must be manually saved in DFsetup** to ensure existing generic reminders are delivered to study participants.
 - ▶ **Save** is disabled at first entry. User must make a small change in the dialog and then **Save**
 - ▶ NOTE: If not saved in DFsetup, existing DFengage mobile users may stop receiving new and overdue activity reminders via push notification, and new DFengage mobile users will not receive the expected push notifications.
 - ▶ Click **History** to check if saved
- ▶ Studies requiring French and Spanish notifications must add the necessary translations in order for participants to continue receiving push notifications in their language.

NEW IN 2.5

MOBILE



DFsetup: ePRO Notifications (1/5)

- ▶ Two generic notifications (new & overdue activity) are pre-populated in dialog
 - ▶ Can be modified as needed for study
 - ▶ Inactivate if using custom created notifications
- ▶ Click **Duplicate** to copy a row to edit or **Add** to create a new row
- ▶ Click **Delete** to delete a row

DFsetup - ePRO Notifications - DFdiscover Sandbox

View ePRO Notifications

ID	Label	Visit	Timing	Translations	Status
1	Generic New Activity Reminder	All	-	1 lang	Active
2	Generic Overdue Activity Reminder	All	-	1 lang	Active

Buttons: Add, Delete, Duplicate

Configuration Panel (Right):

- ID: 2, Label: Generic Overdue Activity Reminder, Status: Active
- Notification Type: Overdue - Sent only if linked activity incomplete
- Visit Reference: All Visits
- Notification Timing: Offset from Visit (Set Time is unselected)
- Days: 0, Hours: 0, Minutes: 0, Direction: After
- Notification Content: default, Clear
- Title: Generic Overdue Activity Reminder
- Message: Oops, you missed your last activity. Let's get back on track now.

Buttons: History, Revert, Save, Done



DFsetup: ePRO Notifications (2/5)

- ▶ **ID:** sequential auto-assigned number
- ▶ **Label:** short description of notification
- ▶ **Active:** notifications status. When inactive (unticked), notification is ignored by DFengage
- ▶ **Notification Type:**
 - ▶ Due = sent at scheduled time
 - ▶ Overdue = sent based on overdue window for a visit when an activity is not yet completed

ID: 3, Label: Upcoming survey Day 8 9:00am, Active:

Notification Type: Due - Sent at scheduled time

Visit Reference: Visit 18 - eDiary Day 8 T-09:00

Notification Timing: Set Time, Offset from Visit

Days: 0, Hours: 0, Minutes: 5, Direction: Before

Notification Content: default, Clear

Title: {{PARTICIPANT_NAME}}, a new survey is coming!

Message: A new survey for {{STUDY_NAME}} will be available in 5 minutes. We would greatly appreciate your feedback.

History, Revert, Save, Done



DFsetup: ePRO Notifications (3/5)

- ▶ **Visit Reference:** apply the reminder to a specific visit or all visits
- ▶ **Notification Timing:**
 - ▶ Define when notification is sent in relation to Visit Reference
 - ▶ Set Time: define a specific time (24-hour clock)
 - ▶ Offset from visit: define # days, hours and minutes before or after referenced visit due or overdue time

Notification Timing

Set Time
 Offset from Visit

09:00

ID Label

3 Upcoming survey Day 8 9:00am Active

Notification Type

Due - Sent at scheduled time

Visit Reference

Visit 18 - eDiary Day 8 T-09:00

Notification Timing

Set Time
 Offset from Visit

Days Hours Minutes Direction

0 0 5 Before

Notification Content default Clear

Title

{{PARTICIPANT_NAME}}, a new survey is coming!

Message

A new survey for {{STUDY_NAME}} will be available in 5 minutes. We would greatly appreciate your feedback.

History Revert Save Done



DFsetup: ePRO Notifications (4/5)

▶ Notification Content: Title and Message

- ▶ Title: Maximum 65 characters
- ▶ Message: Maximum 240 characters
- ▶ Some devices may truncate longer titles
- ▶ The title and message may include placeholders:
 - ▶ {{STUDY_NAME}}
 - ▶ {{PARTICIPANT_NAME}}

▶ Notification Content: Translations

- ▶ Choose language and define content
- ▶ Filled green dot = title & message defined
- ▶ Empty white dot = no title & message defined

The screenshot displays the configuration interface for a notification. Key sections include:

- ID:** 3
- Label:** Upcoming survey Day 8 9:00am
- Notification Type:** Due - Sent at scheduled time
- Visit Reference:** Visit 18 - eDiary Day 8 T-09:00
- Notification Timing:** Offset from Visit (5 minutes before)
- Notification Content:** Title: {{PARTICIPANT_NAME}}, a new survey is coming!; Message: A new survey for {{STUDY_NAME}} will be available in 5 minutes. We would greatly appreciate your feedback.

A language selection dropdown menu is shown to the right, with options: default (selected), French, and Spanish.



DFsetup: ePRO Notifications History

- ▶ To access history:
 - ▶ Click **History** or
 - ▶ File > View History > Config History
 - ▶ Tick **ePRO Notification** box on bottom left is not already ticked

DFsetup - History for ePRO Notifications (last 30 days)								
	Date and Time	Who	Change	ID	What Changed	Attribute	Old Value	New Value
102	2026-05-19 13:32:35	laura	add	8	Day 2 overdue 2	ID		8
103						Label		Day 2 overdue 2
104						Active		Yes
105						Type		due
106						Visit		Visit 12 - Day 2 Diary
107						Timing Type		setTime
108						Set Time		21:00
109						Offset Days		0
110						Offset Hours		2
111						Offset Minutes		0
112						Offset Direction		before
113						Language		English
114						English: Title		Day 2 Diary overdue
115						English: Message		Don't forget to complete your Day 2 diary tonight.
116	2026-05-19 13:32:58	laura	change	1	Generic New Activity Reminder	Active	Yes	No
117	2026-05-19 13:32:58	laura	change	2	Generic Overdue Activity Reminder	Active	Yes	No
118	2026-05-19 13:35:17	laura	add	9	Day 3 due	ID		9
119						Label		Day 3 due
120						Active		Yes
121						Type		due
122						Visit		Visit 13 - Day 3 Diary
123						Timing Type		setTime
124						Set Time		8:00
125						Offset Days		0
126						Offset Hours		2
127						Offset Minutes		0
128						Offset Direction		before
129						Language		English
130						English: Title		Day 3 Diary
131						English: Message		Please complete your Day 3 diary now for {{STUDY_NAME}}.
132	2026-05-19 13:35:30	laura	add	10	Day 3 overdue 1	ID		10
133						Label		Day 3 overdue 1
134						Active		Yes

History for ePRO notification

Limit to last 30 days Refresh Save As...

DFsetup: Page Map

Customize activity names by visit in Page Map

View Page Map

Plate/Visit Title

Plate(s)	Visit(s)	
26	03	SF-36: Day 0
40	03	Subject Diary Card: Day 0
40	10	Subject Diary Card: Day 1
40	20	Subject Diary Card: Day 2
40	30	Subject Diary Card: Day 3
40	40	Subject Diary Card: Day 4
40	50	Subject Diary Card: Day 5

2:55

Welcome, s806p9400
ePRO DEMO

Today's Activities 22 Nov 2023

Overdue

SF-36: Day 0
2 days overdue Start

Subject Diary Card: Day 0
2 days overdue Start

Due Now

Subject Diary Card: Day 1 Start

Subject Diary Card: Day 2 Start

Upcoming

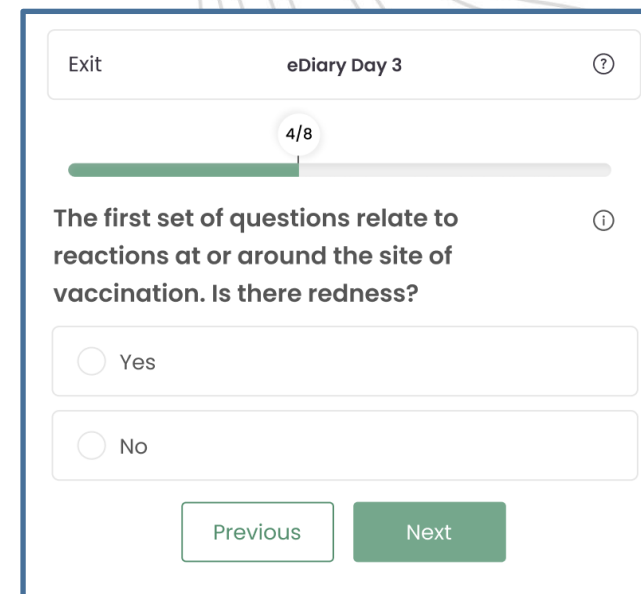
Completed

History Today Settings



DFsetup: Languages

- ▶ DFengage supports study-specific translations
 - ▶ Activity names (plate label, page map label)
 - ▶ Questions (prompt, instructions), help, responses (choice/check labels, units)
- ▶ App interface language is separate from study language, available in English, Spanish, French
 - ▶ Based on device language setting
 - ▶ English is default language
- ▶ DFengage auto-selects study language if one matches device language setting; otherwise, user manually selects their study language



Exit eDiary Day 3 ?

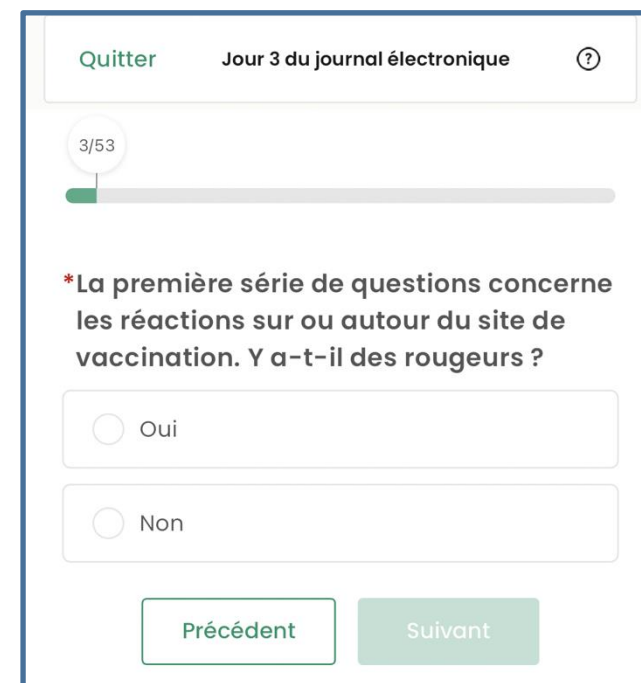
4/8

The first set of questions relate to reactions at or around the site of vaccination. Is there redness? ⓘ

Yes

No

Previous Next



Quitter Jour 3 du journal électronique ?

3/53

*La première série de questions concerne les réactions sur ou autour du site de vaccination. Y a-t-il des rougeurs ?

Oui

Non

Précédent Suivant



DFengage: App vs. Study Language

App language

Study language

Salir Cuestionario del día 4

4/7

¿Qué síntomas tienes ahora?

Acerca de esta pregunta

Seleccione uno o más de los síntomas que está teniendo en este momento.

Seleccione tantos síntomas como sea necesario.

Dolor de cabeza

Náuseas

Fatiga

Dolores en las articulaciones

Dolores musculares

Anterior **Siguiente**

Salir Cuestionario del día 4

4/7

¿Qué síntomas tienes ahora?

Acerca de esta pregunta

Seleccione uno o más de los síntomas que está teniendo en este momento.

Seleccione tantos síntomas como sea necesario.

Dolor de cabeza

Náuseas

Fatiga

Dolores en las articulaciones

Dolores musculares

Anterior **Siguiente**

Quitter Questionnaire du jour 4

3/7

*Quelle est votre glycémie?

56 g/dL

La réponse que vous avez saisie est peut-être incorrecte. Veuillez la vérifier avant de continuer.

Précédent **Suivant**

Quitter Questionnaire du jour 4

3/7

*Quelle est votre glycémie?

56 g/dL

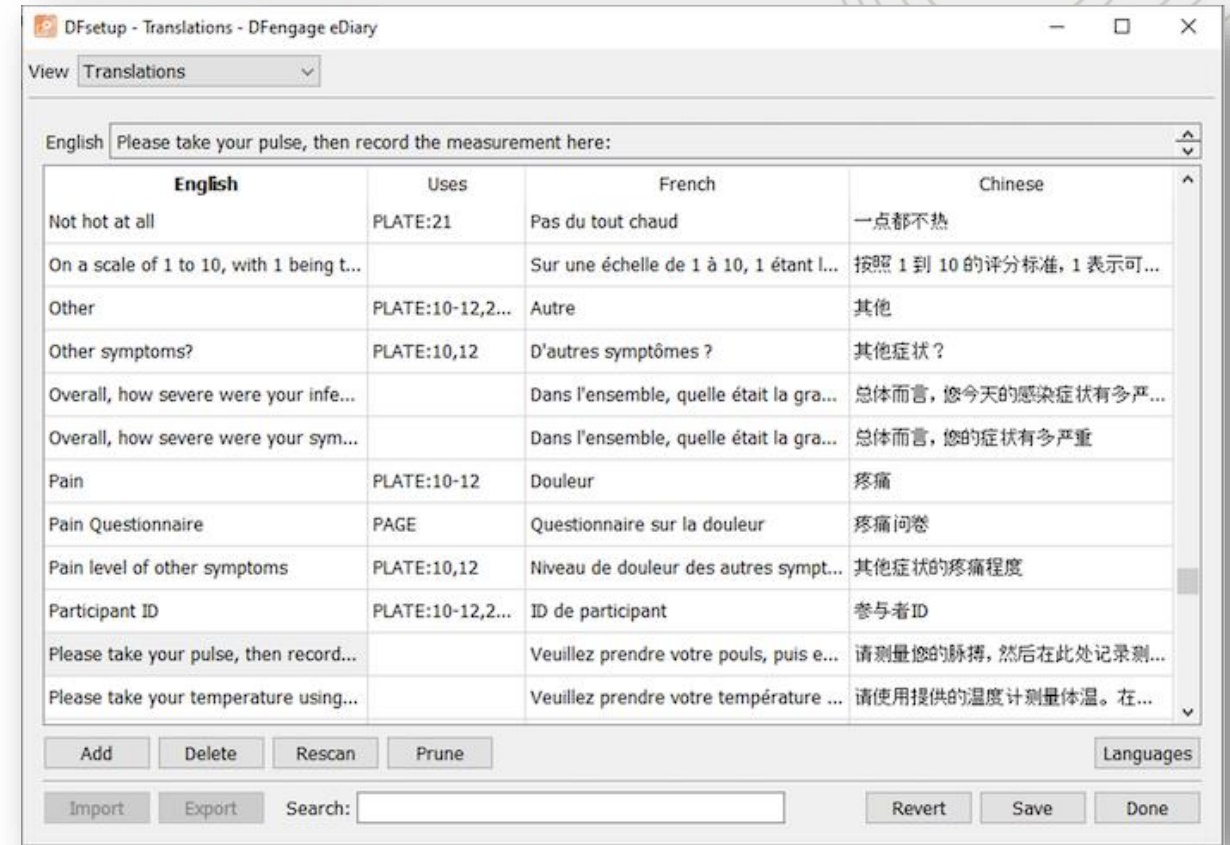
La réponse que vous avez saisie est peut-être incorrecte. Veuillez la vérifier avant de continuer.

Précédent **Suivant**



DFsetup: Translations (1/2)

- ▶ Table includes all text in the database including prompt, code labels, help, and instructions
- ▶ Use **Languages** to specify available languages (one column per language) and rename default language
 - ▶ To match with DFengage interface languages, use language labels “English”, ”Spanish”, and “French”
 - ▶ To prompt for language selection on English-language devices, use label other than “English” for the default language (e.g., “Default”, “Default-English”)





DFsetup: Translations (2/2)

- ▶ **Uses** column restricts what is translated
 - ▶ Specify plate(s) the translation applies to
 - ▶ Add translations for plate/page labels
- ▶ Rows in alphabetical order by default language
- ▶ Add translations manually or import from a CSV or pipe-delimited text file
 - ▶ Manual: Use **Search** to find specific text in the table
 - ▶ Import: Click **Save**, click **Export** to save current table to a file, add translations in file outside DFsetup, then **Import**
- ▶ Use **Rescan** to pull all available text, **Add** to add a row

English	Uses	French	Chinese
Not hot at all	PLATE:21	Pas du tout chaud	一点都不热
On a scale of 1 to 10, with 1 being t...		Sur une échelle de 1 à 10, 1 étant l...	按照 1 到 10 的评分标准, 1 表示可...
Other	PLATE:10-12,2...	Autre	其他
Other symptoms?	PLATE:10,12	D'autres symptômes ?	其他症状 ?
Overall, how severe were your infe...		Dans l'ensemble, quelle était la gra...	总体而言, 您今天的感染症状有多严...
Overall, how severe were your sym...		Dans l'ensemble, quelle était la gra...	总体而言, 您的症状有多严重
Pain	PLATE:10-12	Douleur	疼痛
Pain Questionnaire	PAGE	Questionnaire sur la douleur	疼痛问卷
Pain level of other symptoms	PLATE:10,12	Niveau de douleur des autres sympt...	其他症状的疼痛程度
Participant ID	PLATE:10-12,2...	ID de participant	参与者ID
Please take your pulse, then record...		Veillez prendre votre pouls, puis e...	请测量您的脉搏, 然后在此处记录...
Please take your temperature using...		Veillez prendre votre température ...	请使用提供的温度计测量体温。在...



DFsetup: Mid-study Changes

- ▶ Mid-study changes may not take effect immediately on participant devices
 - ▶ DFengage syncs with the DFdiscover server when the app is open while online
 - ▶ This helps reduce how much data DFengage uses on the participant's device
- ▶ Mid-study changes are available the next time the study participant opens DFengage while connected to the internet
 - ▶ Notifications are sent using previous timing before syncing with the server
 - ▶ If offline, DFengage shows the previous activities and questions before syncing
 - ▶ If online, DFengage shows the updated activities and questions
- ▶ Consider creating new plates if ePRO forms need to be changed in non-compatible ways (changes to the database structure)



DFengage Administration

Considerations for DFadmin



DFadmin: Roles

- ▶ Create specific ePRO role with exact name: **ePROdata**
- ▶ Required Tools & Reports access:
 - ▶ DFexplore – Data
 - ▶ API Clients – DFengage

The screenshot shows the configuration page for a role named 'ePROdata'. The 'Name' field contains 'ePROdata' and the 'Description' field is empty. There are three tabs: 'Tools & Reports', 'Auto Logout', and 'Permissions'. The 'Tools & Reports' tab is active, showing a list of permissions. A checkbox for 'DFexplore & API Clients' is checked. Under 'DFexplore Views', the 'Data' checkbox is checked and highlighted in yellow. Under 'API Clients', the 'DFengage' checkbox is checked and highlighted in yellow. Other permissions like 'Batch Edits', 'Dashboard', 'Data - Attach subject document', etc., are unchecked.

Name	ePROdata
Description	
Tools & Reports	Auto Logout Permissions
<input type="checkbox"/> DFexplore & API Clients	
DFexplore Views	
<input type="checkbox"/> Batch Edits	
<input type="checkbox"/> Dashboard	
<input checked="" type="checkbox"/> Data	
<input type="checkbox"/> Data - Attach subject document	
<input type="checkbox"/> Data - Import subject CRFs	
<input type="checkbox"/> Data - Submit PDF	
<input type="checkbox"/> Data - with Select	
<input type="checkbox"/> Image	
<input type="checkbox"/> Image - Create tasks	
<input type="checkbox"/> Image - Delete new records	
<input type="checkbox"/> Image - Raw data entry	
<input type="checkbox"/> Images	
<input type="checkbox"/> Reports	
DFexplore Miscellaneous	
<input type="checkbox"/> Developer	
<input type="checkbox"/> May disable edit checks	
<input type="checkbox"/> Show query status detail	
API Clients	
<input type="checkbox"/> DFcollect	
<input checked="" type="checkbox"/> DFengage	
<input type="checkbox"/> DFsources	
<input type="checkbox"/> DFweb	



DFadmin: Role Permissions – View Access

DFdiscover 5.7 and earlier

Tools & Reports		Auto Logout		Permissions		Restrictions		History																			
Get			Show		Show		Modify		Write		Data					Queries					Reasons						
	Visits	Plates	Levels	Hidden Fields	Int. Queries	Levels	Levels			C	M	D	L	P		C	M	D	A	R		C	M	D	A		
<input checked="" type="checkbox"/>	0	5	ALL	<input type="checkbox"/> Show	<input type="checkbox"/> Show	-	-			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	1-18	10, 20, 40, 96	ALL	<input type="checkbox"/> Show	<input type="checkbox"/> Show	ALL	1			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>				<input type="checkbox"/> Show	<input type="checkbox"/> Show					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>

- ▶ View-only access to data record where the **baseline visit date** for ePRO visits is captured
 - ▶ View-only = No permissions for data, queries, or reasons
 - ▶ This record will not be displayed in DFengage
- ▶ Get - Levels: specify all levels the baseline data record could be saved to
- ▶ No permissions for Data, Queries, or Reasons (no boxes checked)



DFadmin: Role Permissions – View Access

DFdiscover 5.8 and later

Tools & Reports		Auto Logout		Permissions		Restrictions		History																		
Get		Show		Show		Modify		Write		Data		Queries		Reasons												
	Visits	Plates	Levels	Hidden Fields	Int. Queries	Levels	Levels			C	M	D	L	P		C	M	D	A	R		C	M	D	A	
<input checked="" type="checkbox"/>	0	5	ALL	<input type="checkbox"/> Show	<input type="checkbox"/> Show	-	-			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	1-18	10, 20, 40, 96	ALL	<input type="checkbox"/> Show	<input type="checkbox"/> Show	ALL	1			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>				<input type="checkbox"/> Show	<input type="checkbox"/> Show					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- ▶ View-only access to data records with the **baseline visit date** for ePRO visits **and any other data** used for ePRO visit and plate requirements
 - ▶ If using cycle scheduling, conditional maps, missed visit plates, termination plates/visits that affect ePRO visits and plates, view only access is required to the referenced data records
- ▶ Get - Levels: specify all levels the data records could be saved to
- ▶ No permissions for Data, Queries, or Reasons (no boxes checked)
- ▶ These records are not visible in DFengage



DFadmin: Role Permissions – Write Access

Tools & Reports		Auto Logout		Permissions		Restrictions		History																
Get		Show		Show		Modify		Write		Data					Queries					Reasons				
	Visits	Plates	Levels	Hidden Fields	Int. Queries	Levels	Levels	C	M	D	L	P	C	M	D	A	R	C	M	D	A			
<input checked="" type="checkbox"/>	0	5	ALL	<input type="checkbox"/> Show	<input type="checkbox"/> Show	-	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	1-18	10, 20, 40, 96	ALL	<input type="checkbox"/> Show	<input type="checkbox"/> Show	ALL	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>				<input type="checkbox"/> Show	<input type="checkbox"/> Show			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- ▶ List ePRO visits and ePRO plates individually to help avoid errors or omissions
- ▶ Recommended: Do not show hidden fields (use hidden fields for non-ePRO fields on ePRO plates)
- ▶ Modify - Levels: include all workflow levels in use
 - ▶ When ePRO data is synced, it cannot be saved if the data record already exists at a level outside the modify level permissions. This may happen if ePRO is completed offline and the same data record has been previously entered in another manner (via paper or site EDC).
 - ▶ *Discuss with study team and test thoroughly to ensure that DFengage behavior fits within the overall data workflow*
- ▶ Write - Levels: API saves data to the server at level 1
- ▶ Data: Create and Modify, Reasons: Modify



DFadmin: User Accounts

User profile data for ePRO study participants is protected from unauthorized access to support privacy requirements

- ▶ User account is designated as **ePRO** when ‘ePROdata’ role is assigned
 - ▶ For test accounts, add another permission with any role other than ‘ePROdata’
- ▶ For ePRO users only, user profile data (name, email address) is hidden in DFadmin and only available to authorized users in DFweb
- ▶ User profile data is encrypted to protect against unauthorized access
- ▶ Use generic, unique usernames with subject ID and study reference
 - ▶ test10001, xyz9999, s20p4001



DFadmin: ePRO User Profiles

- ▶ 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

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

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



DFadmin: User Permissions

- ▶ Each ePRO user has a DFdiscover account with access to one study, one subject ID with ePRO role
- ▶ ePRO user accounts must be created in DFadmin to show in DFweb ePRO Management page
- ▶ **DFengage will not work if the user permissions has more than one study or subject ID assigned**
- ▶ Add multiple users at once with **Add Bulk Users** function or DFuserPerms command line program

The screenshot shows the DFadmin interface for user management. At the top, a list of users is displayed with columns for Username, Creation Date, Subject, and Organization. Below this, the user profile for 'beta007' is shown, including their status (Active) and a 'New Password' button. The 'Permissions' tab is selected, showing the 'Study or DFdiscover Administrator' set to 'None'. There is a checkbox for 'Allow access to Image Router' which is unchecked. The 'Study Roles' section contains a table with columns for Study, Sites, Subjects, and Role Name. The first row is highlighted in green and shows '809 DFengage Beta' with 2 sites, subject '2007', and role 'ePROdata'. A second row is partially visible below it.

Study	Sites	Subjects	Role Name
809 DFengage Beta	2	2007	ePROdata



DFadmin: Add Bulk Users

1. Under the Users tab, click **Add Bulk Users**
2. Select the study and role
3. Specify the username prefix and the range of subject IDs for the users to be created (e.g., sXp, where X is the study number)
 - a) Subject IDs specified must be defined in the Sites configuration in DFsetup
 - b) Maximum 100 subjects at one time
4. Provide the initial, temporary password to be used for all accounts
5. Click **Add n user accounts** to create user accounts and assign study permissions and click **Yes** in confirmation dialog
 - a) Results panel will list usernames and creation status

DFadmin - Add Bulk Users

Specify the study, role, username prefix and range of subject IDs to create multiple user accounts each with access to a single subject ID. Each subject user account will be assigned a unique username based on their subject ID and the same temporary password for all accounts.

Study: 117 DFengage eDiary
Role: ePROdata
Username Prefix: s117p
Subjects Range: 10-15,20-25,30-35 Preview usernames
Initial Password:

Add 18 user accounts

Results:

	Username	Log message
1	s117p10	Success
2	s117p11	Success
3	s117p12	Success
4	s117p13	Success
5	s117p14	Success
6	s117p15	Success
7	s117p20	Success
8	s117p21	Success

Close



DFadmin: Finding ePRO users

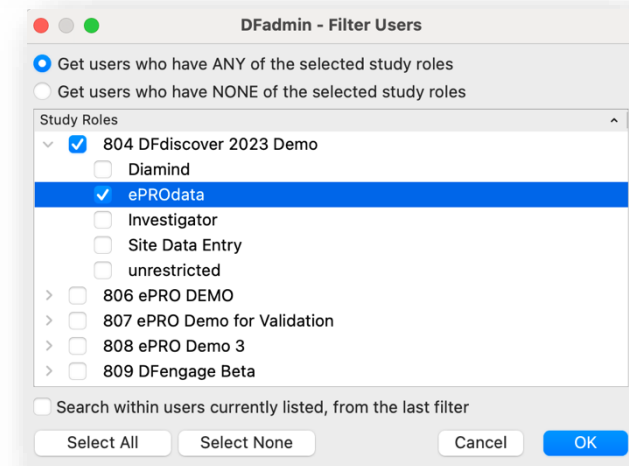
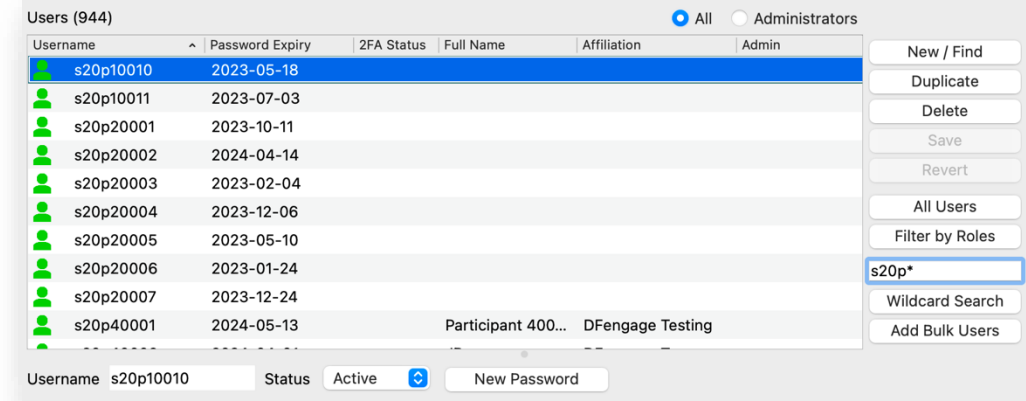
Wildcard search

- ▶ Type any portion of the username with * before or after to find all matches
- ▶ Examples:
 - ▶ s20p* to find all usernames starting with s20p
 - ▶ *001 to find all usernames ending with 001
 - ▶ s20p10011 to find an exact match

Filter by roles

- ▶ Click **Filter by Roles**
- ▶ Select the study role(s) and click **OK**

When complete, click **All Users** to remove filter





DFadmin: ePRO Management Permissions

- ▶ Access to DFweb ePRO Management page controlled for each user via **ePRO Admin Permissions** tab
- ▶ ePRO Admin permission types:
 - ▶ Admin: Full access
 - ▶ Monitor: View access with PII shown
 - ▶ Viewer: View access with no PII shown
- ▶ Specify study, type, and site(s)
- ▶ Only assign **Admin** and **Monitor** permissions to those authorized to view study participant PII

The screenshot displays the DFadmin interface. At the top, a table lists users with columns for Username, Password Expiry, 2FA Status, SSO Only, Full Name, and Affiliation. The 'demo' user is selected. Below this, the 'demo' user profile is shown with a status of 'Active' and a 'New Password' button. The 'ePRO Admin Permissions' tab is active, showing a table of permissions for the specified studies. A green box highlights the 'ePRO Admin Permissions' section.

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
<input type="checkbox"/>			



DFadmin: Study Configurations

- ▶ If using different API and DFdiscover server versions (not recommended), the study must be configured to accept connections from the API version
 - ▶ Version Strict: Select **All minor versions supported** or **Minimum version supported**
- ▶ If the DFdiscover server and API server versions used by DFengage match, **Only current version supported** is allowed

Configurations	Auto Logout	Permissions	Watermark
Study Number	596		
Name	DFengage eDiary Demo		
Administrators	darryl		
Study Directory	/opt/studies/DFengage_eDiary_Demo		
Working Directory	\$(STUDY_DIR)/work		
Pages Directory	\$(STUDY_DIR)/pages		
Preset Printer	lp	[Must exist on server]	
Candidate Hosts	internal.dfdiscover.com		
Minimum Free Disk	500000 KB	▲▼	
Study URL			
Allow Local Cache	<input type="checkbox"/>		
Version Strict	All minor versions supported ▼		



Best practices and considerations

Alternatives to DFengage ePRO

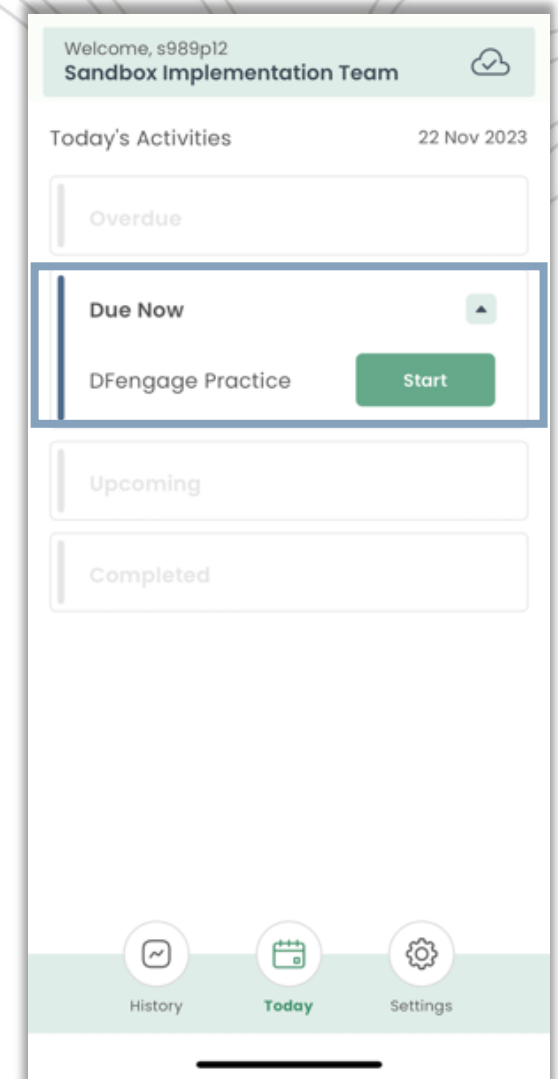
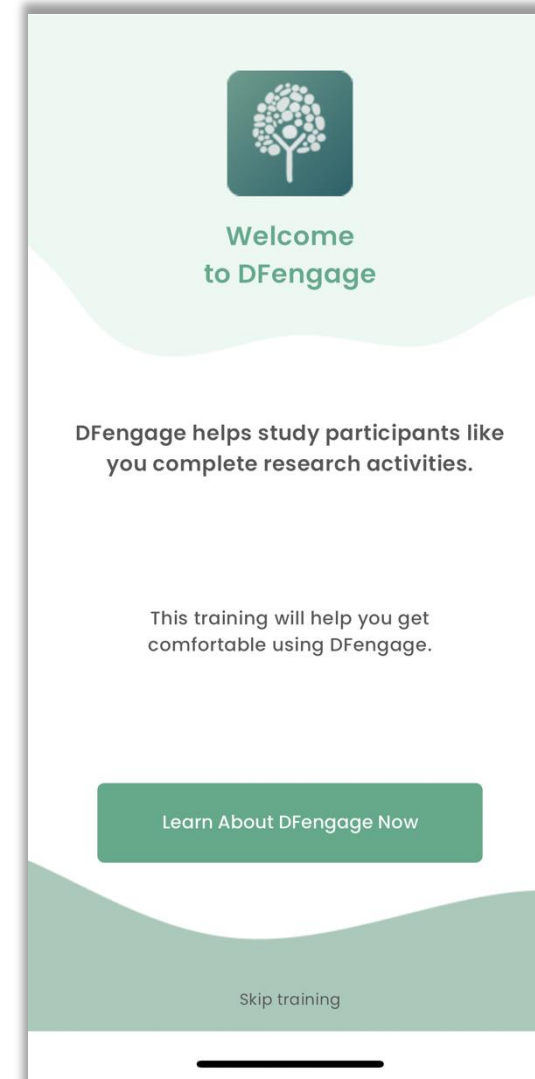
What if a participant can't or won't use DFengage (mobile or web)?

Options to consider depending on data, protocol, study feasibility & requirements:

- ▶ Site staff conducts interview (phone/in person) & enters data in EDC
- ▶ Participant completes the PRO on paper forms
 - ▶ Paper forms are barcoded, then scanned & submitted by sites for image-based entry by data team; or site staff transcribe from paper in EDC
- ▶ Sponsor/site provides device to participant with DFengage pre-installed
 - ▶ Device provision, device management and return procedures
- ▶ Protocol includes BYOD (bring your own device) use of ePRO app in eligibility criteria, if critical to the study

Training & practice activity

- ▶ Training is provided in-app on first login and available on demand from the Settings page
 - ▶ Available both online & offline
- ▶ If hands-on experience is needed, consider creating a practice activity
 - ▶ Participants can complete while at clinic
 - ▶ Add as first activity in DFengage (baseline visit date is required)
 - ▶ Clinic staff can answer questions
 - ▶ Try out all data field types



Example practice activity questions

Suggestion for text field: Enter device details to help with future troubleshooting

The first screenshot shows a progress bar at 2/8 and the question "Practice choosing the date:". Below it is a date input field containing "22/11/2023" and "Previous" and "Next" buttons. The second screenshot shows a progress bar at 3/8 and the question "Practice choosing the time:". Below it is a time input field containing "16:46" and "Previous" and "Next" buttons.

Date & time fields

The third screenshot shows a progress bar at 4/8 and the question "Practice tapping when only one choice is allowed:". Below it are two radio button options: "Yes" (selected) and "No". "Previous" and "Next" buttons are at the bottom. The fourth screenshot shows a progress bar at 5/8 and the question "Practice tapping more than one choice:". Below it are three radio button options: "Choice #1", "Choice #2" (selected), and "Choice #3". "Previous" and "Next" buttons are at the bottom.

Choice & check fields

The fifth screenshot shows a progress bar at 6/8 and the question "Practice entering a number:". Below it is a text input field containing "55" and "Previous" and "Next" buttons. A numeric keypad is visible at the bottom. The sixth screenshot shows a progress bar at 7/8 and the question "Practice tapping the scale to enter a number:". Below it is a slider control with values 0, 2, and 10. The slider is positioned at 2. Below the slider is a "Clear this value" link and "Previous" and "Next" buttons.

Number & VAS fields

The seventh screenshot shows a progress bar at 8/8 and the question "Practice entering short text:". Below it is a text input field containing "iPhone 15" and "Previous" and "Finish" buttons. A full QWERTY keyboard is visible at the bottom.

String (text) field

Notification limitations (iOS only)

- ▶ If the participant does not open DFengage after multiple notifications, the app may stop sending notifications
 - ▶ Notifications are scheduled for next 72 hours or at least 32 notifications
 - ▶ Notifications may stop after 72 hours (if more than 32) or after 32 notifications
- ▶ Make a plan for site staff to follow up with participants in case of missed ePRO activities, to avoid missing data
 - ▶ Send email notifications for overdue activities
 - ▶ Create tasks or listings of overdue activities

Training & communication flow

- ▶ Train site staff on issue handling and communication plan
 - ▶ Capture error code and screenshots if possible
- ▶ Example communication flow:
 - ▶ Study participants contact site staff
 - ▶ If not resolved, site staff contacts sponsor/CRO/coordinating center/study team
 - ▶ If not resolved, escalate to DFnet software team for technical support (help@dfnetresearch.com)
- ▶ Ensure that participant confidentiality & privacy are maintained

Password resets for DFengage users

- ▶ ePRO registration via DFweb is required to enable **forgot password** functionality in DFengage
 - ▶ Forgot password requires participant email address
 - ▶ ePRO management page in DFweb securely captures participant email address from site staff
- ▶ If not registering participant email addresses, study administrator manually performs the password reset
 - ▶ Reset password requests are forwarded to study/DFdiscover administrator
 - ▶ Administrator resets password in DFadmin and provides it to the requestor

Activity expiry

- ▶ What if participant does not complete an activity within required timeframe?
 - ▶ Completing the record in DFexplore/DFweb/DFcollect removes the activity from DFengage
 - ▶ Pages set as missed are also excluded from DFengage
- ▶ Option: use a hidden “expiry” checkbox and edit check run in batch
 - ▶ Batch edit check marks expiry checkbox to “expire” ePRO record on study-defined schedule. This removes it from DFengage and shows it as “expired” in EDC
 - ▶ Contact DFnet software support team (help@dfnetresearch.com) for details

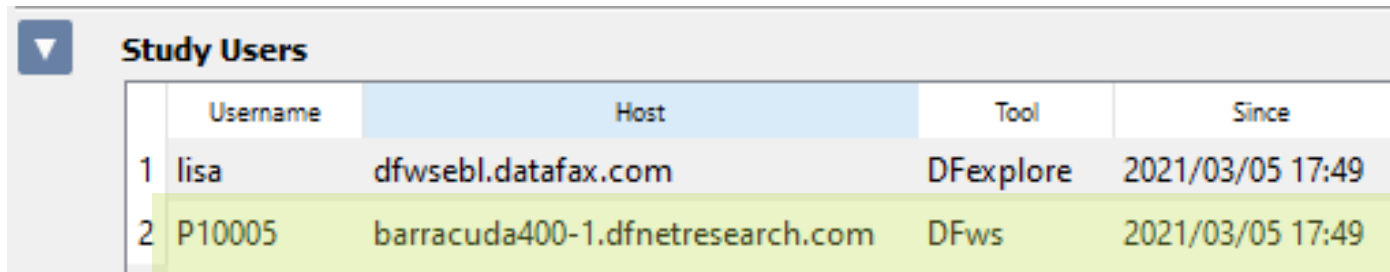
have been experiencing during the the “Not at all” box, if you did not



```
edit SetExpiry() {  
  
    string message;  
    string window;  
    number target = 0; #Target number of days  
    number expiry = 1; #days after expected visit date to expire ePRO plates  
    number k=10; #make fields missing/blank starting on field 10  
    number l=10; #  
    number lastfield = dfplateinfo(@[5],DFPLATE_FIELDS);  
    number chk = 0; #check for any non-blank fields before running  
  
    date dt_zero; #Day 0 Date  
    date dt_target; #date target  
    date dt_expiry; #expiry date  
    date dt_term; #study termination date
```

Avoiding “Activity is currently locked” message

- ▶ In DFExplore, work in **View** mode where feasible
 - ▶ View mode does not block user from sending activities via DFengage
 - ▶ Consider setting view mode as default for some users via edit checks
 - ▶ Use tasks or manually switch to use other modes
- ▶ Where possible, use DFweb or DFcollect for site data entry
 - ▶ DFweb and DFcollect lock at page-level; DFExplore at subject-level
- ▶ Check for ePRO users in DFExplore Status View when needed



	Username	Host	Tool	Since
1	lisa	dfwsebl.datafax.com	DFExplore	2021/03/05 17:49
2	P10005	barracuda400-1.dfnetresearch.com	DFws	2021/03/05 17:49

Blank fields submitted from DFengage

- ▶ When the user sees a question in DFengage but provides no response, the field is left blank except for choice and check fields
 - ▶ Defined “no choice” code value is entered for choice and check fields only
 - ▶ Example: choice field where 0=blank, 1=Yes, 2=No; user provides no response; value = 0
- ▶ When a field is skipped or hidden in DFengage (user doesn't see the question), no data value is assigned to the field, including for choice and check fields
- ▶ Consider any impact on edit checks or data analysis once data is received in DFdiscover



Troubleshooting

Support and Error Codes

Troubleshooting – Common Issues

Unable to log in

- ▶ Check for typos in the username, password, server, and API
- ▶ Check that user account is active with ePROdata role assigned; check ePROdata role definition
- ▶ Check with DFdiscover server administrator to confirm server and API setup
- ▶ Make sure not to move between browsers/devices if confirming email/resetting password on DFengage web

Able to log in, but unable to proceed past PIN setup

- ▶ Check user permissions: user must have access to one subject ID in one study only
- ▶ Check role definition: role name ePROdata; DFexplore – Data; API Clients – DFengage
- ▶ Confirm Version Strict study setting allows API and server versions to connect

Able to log in, but expected activities do not appear on Today screen

- ▶ Check role definition (view access to records with dates required for visit calculations, write access to ePRO records)
- ▶ Check Subject Schedule of Pages standard report or DFexplore Schedule View for visit scheduling issues
 - ▶ Only visits with a ‘Schedule date’ available and required plates will appear in DFengage
 - ▶ Review visit map and conditional maps to verify visit scheduling and plate requirements

Troubleshooting

- ▶ Unable to submit data to DFdiscover?
 - ▶ Check for subject or page lock by a user in DFexplore/DFweb/DFcollect
 - ▶ *On mobile:* **Do not delete or uninstall DFengage**, since this will delete all data stored locally
 - ▶ *On web:* **Do not log out of DFengage**, since this will delete all data not yet synced
 - ▶ Ask participants to report error codes and share screenshots where possible to help with diagnosing any issues
- ▶ All error codes and how to resolve them are described in the following slides
- ▶ Contact help@dfnetresearch.com with other issues or bug reports

DFengage errors and how to resolve them (1/4)

Error code	Error message	Issue	Instructions
01	Can't receive study info. We're having trouble receiving your study info. Please close the app and try again later.	Server could not retrieve the study that the user was trying to access.	Check if user has access to the correct site and subject in DFadmin. Check for any errors in DFsetup.
02	Study is currently being edited. We can't receive/send study info since your study is currently being edited. Please close the app and try again later.	Another user has the subject binder locked in DFexplore or the record locked in DFweb or DFcollect. Another user may have DFsetup open in exclusive or developer mode.	Ask other users to close binder (check DFexplore Status View to see who is connected) or exit DFsetup.
03	Can't receive study info. We're having trouble receiving your study info. Please close the app and try again later.	The data returned from the server was an unrecognized format.	Check for incorrect format of fields and variables in DFsetup.
04	Can't receive study info. We're having trouble receiving your study info. Please close the app and try again later.	The server could not respond with relevant site data. Possible internal server error retrieving data.	Check if user has access to the correct site in DFadmin.
05	Can't receive study info. We're having trouble receiving your study info. Please close the app and try again later.	The server could not respond with relevant subject data. Possible internal server error retrieving data.	Check if user has access to the correct subject in DFadmin.

DFengage errors and how to resolve them (2/4)

Error code	Error message	Issue	Instructions
06	Can't receive study info. We're having trouble receiving your study info. Please close the app and try again later.	The server could not respond with relevant binder data. Possible internal server error retrieving data.	Check if user has access to the correct subject in DFadmin.
07	Can't receive study info. We're having trouble receiving your study info. Please close the app and try again later.	The server could not respond with relevant visit map data. Possible internal server error retrieving data.	Check visit permissions in DFadmin. Check for any errors in DFsetup.
08	Can't receive study info. We're having trouble receiving your study info. Please close the app and try again later.	The server could not respond with relevant baseline data. Possible internal server error retrieving data.	Check that baseline visit date has been entered. Review visit map in DFsetup. Review role permissions for view access to visit and plate with baseline visit date in DFadmin.
09	Can't finalise questions. We're having trouble sending data to the server. Please make sure you have internet access.	User was trying to submit the answers to the server and an error occurred (other than study currently being edited).	User may have to redo questionnaire. Ask user to retry.
10	Can't receive study info. We're having trouble receiving your study info. Please make sure you have internet access.	This error will only occur if the user has no internet access and has not saved any local data for them to work offline.	Ask the DFengage user to close the app, connect the device to the internet, and open the app again to retrieve data from the server.

DFengage errors and how to resolve them (3/4)

Error code	Error message	Issue	Instructions
11	Can't receive study info. We couldn't retrieve one of your questionnaires. Please close the app and try again later.	The server could not respond with relevant plate data. Possible internal server error retrieving data.	Check plate permissions in DFadmin. Check for any errors in DFsetup.
12	Invalid credentials. The username or password you have entered is invalid. Please check and try again.	Incorrect username or password.	Confirm correct username and password. Ask DFengage user to use eye icon in password field to check for typing errors in the password.
13	Sync failed: We're having trouble syncing your data. Please make sure you have internet access, close the app and try again later. If this issue persists, please contact support	The app cannot sync data to the server.	Similar to error code 02. Ask other DFdiscover users to close binder (check Status View in DFexplore) or exit DFsetup.
14	Can't retrieve languages. We're having trouble receiving the languages of your study. Please close the app and try again later.	The app cannot retrieve languages.	Check translation map in DFsetup.
15	Connection timeout. Please check your connection and try again. If this issue persists, please contact support.	VPN or IP has no access	Contact your DFdiscover server administrator.
16	The server or API you have entered is invalid. Please check and try again	Incorrect server or API.	Confirm correct server and API. Contact your DFdiscover server administrator if the problem persists.

DFengage errors and how to resolve them (4/4)

Error code	Error message	Issue	Instructions
17	The server you have entered is invalid. Please check and try again.	Received 'Host not found' error (status 600) from the server	Confirm correct server and API. Contact your DFdiscover server administrator if the problem persists.
18	Can't receive study info. We're having trouble receiving your study info. Please close the app and try again later.	Session timeout due to some reason	Contact your DFdiscover server administrator.
19	The app could not access the server or API you have entered. Please contact support.	Invalid authorization token	Server is not configured to allow DFengage to connect. Contact your DFdiscover server administrator.
20	Activity is currently locked.	Another user has the subject binder locked in DFexplore or the record locked in DFweb or DFcollect.	Ask other users to close subject binder. App will automatically retry when opened later.
21	Your password has expired. Please set a new password.	The user's password has expired.	The DFengage user must set a new password to continue using the app.
99	An error has occurred. We have encountered an unknown error. Please close the app and try again later.	Generic error. May occur if more than one of the above errors exists.	Review user permissions and role definition in DFadmin. Review baseline visit date entered for the subject. Check for visit map or plate definition errors in DFsetup. Contact your DFdiscover server administrator if the problem persists.



Welcome to DFengage!

Thank you

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Contact info@dfnetresearch.com for DFnet sales and licensing inquiries