

DFweb User Guide

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Preface

DFdiscover Release 5.11.0

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June 01 2026

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Getting Help

For software support, Please contact the DFdiscover team:

- via email, help@dfnetresearch.com.
- Visit our website, <https://www.dfnetresearch.com>.

Conventions

A number of conventions have been used throughout this document.

Any freestanding sections of code are generally shown like this:

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

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

Text may also have several styles:

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

Introduction

This guide describes the **DFweb** application.

The instructions are intended to describe, in general terms, how data entry tasks are performed using **DFweb**. The guidance provided here is not meant to replace more specific instructions which may be provided by the sponsor, principal investigator or coordinating site for a particular trial.

What is DFweb?

DFweb is a browser-based application that allows users to perform data entry, data review, and query resolution and view reports for a **DFdiscover** study.

Compatible Browsers

DFweb requires a browser with HTML5 capabilities. Check your browser's capabilities at <https://html5test.co>.

DFweb has been tested with current versions of Chrome, Firefox, and Edge on **Windows 10** and Chrome, Firefox, and Safari on **macOS 10.14 (Mojave) or later**. Browser updates are frequently made available by vendors.

Important: Please keep your browser up-to-date.

DFweb is not compatible with any version of Internet Explorer, any browser in **Windows XP** or any browser in **Windows 7**.

The minimum recommended screen width is 400 pixels, except for studies using CRFs with backgrounds and **DFdiscover** reports, where the minimum recommended screen width is 800 pixels. To avoid horizontal scrolling with CRF backgrounds in portrait orientation, the minimum recommended screen width is 1280 pixels.

Capabilities

The main purpose of **DFweb** is to facilitate data entry at clinical sites participating in a **DFdiscover** study without the need for the additional features available in **DFexplore**. It may also be that a site is unable to install a local application like **DFexplore** - **DFweb** is the perfect solution.

DFweb supports many of the same data validation features as **DFexplore**: legal range checking, type validation, required values, field skipping, missing value coding, lookup tables, and several metadata features: adding, resolving, and editing queries, and adding reasons for data values. It also supports the **DFdiscover** edit checks language, with a few exceptions.

DFweb provides additional features including a Queries page to identify and resolve outstanding data issues, a Tasks page to review study-defined subsets of data, and a Reports page to view standard **DFdiscover** reports and custom listings.

Access **DFweb** from any compatible browser via the URL <https://dfweb.dfdiscovers.com/>. You may be provided with a custom URL for **DFweb** by your study sponsor or coordinating center.

Login

The server selection page is the initial landing page in **DFweb** for new users or if you are accessing **DFweb** in a new browser or on a new device. Enter the **DFdiscover Server** for your study and click `Continue` to proceed to the login page.

For subsequent logins, this page is skipped and the **DFdiscover** server is displayed on the login page. If you are using a URL provided by your study sponsor or coordinating center, you may not see this page and instead go directly to the login page.

Cookies are required to enable certain functions of the website. By using this website, you accept our [use of cookies](#).

Accept

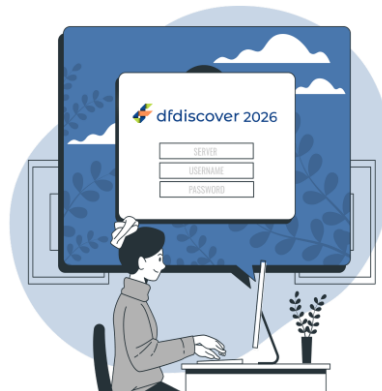


DFdiscover Server

Continue

Settings

Privacy Policy



If there is a problem with the server name you've provided, an error message appears below the [Continue](#) button.

The login page is where you provide your username and password in order to access **DFweb**. The **DFdiscover** server you are connecting to is shown on the top left of the page. If the **DFdiscover** administrator has provided an information message, this will be shown on the right side of the screen or at the bottom of the screen on smaller displays.

explore.dfdiscover.com



Username

Password

[Forgot Password?](#)

Login

OR

Login with Microsoft

Settings

Privacy Policy



To access a study, a successful login is required. Successful login requires a valid **Username** and **Password** for the **DFdiscover** server you are connecting to. Your study sponsor or coordinating center has provided you with your own unique credentials. After login, all activities are logged with your username. Do not share your credentials with any other user - each user must use their own credentials.

If you already have login credentials for other **DFdiscover** tools, the login credentials for **DFweb** are identical.

Enter your Username and Password exactly as provided. Click [Login](#) to login.

If there is a problem with the credentials you've provided, an error message appears below the [Login](#) button.

If you don't remember your password, click [Forgot Password?](#) on the login page. Provide the **DFdiscover Server**, **Username**, and **Email** and click [Send Email](#) to request a new password. You will receive an email with the subject line *"DFdiscover password reset"*. Follow the instructions in that email to reset your password.

When you login for the first time, or if your password expires, you may be prompted to provide a new password. To continue, provide a new password meeting the stated requirements.

If you need to connect to a different **DFdiscover** server from the login page, change the server name in the field at the top left of the page. All servers you have connected to with this browser will appear in the dropdown to allow easy switching between servers.

Two-Factor Authentication

The administrator of the DFdiscover Server may have enabled two-factor authentication for your login account. If it is enabled, after successful authentication a new screen

will appear to request the security code. You will receive a 6-digit security code in an email or an SMS message, depending on which is configured for your account. The email is sent to the email address on file for the account. The SMS message is sent to the phone number on file for the account. Enter the 6-digit security code.

✕

Two Factor Authentication

A verification code has been sent to you. This code will be valid for 10 mins

Trust this browser

[Resend Code](#)

The code is unique to your login in the current browser and is valid for 10 minutes. If you do not receive the code or it is no longer valid, you can request another code by clicking **Resend Code**. After entering the code, click **Verify** to complete login.

If you are using a personal device, you can choose to enable **Trust this browser**. By enabling this setting, you will not be asked for another security code for 30 days when using the same browser. If you are using a shared device, do not enable this setting – this provides an additional layer of security as each login will require a unique security code.

Logging in with Microsoft

If Single Sign On with Microsoft is enabled on your **DFdiscover** server, a **Login with Microsoft** button will show on the **DFweb** login page. If your account has configured to use a Microsoft login, click **Login with Microsoft** to begin the Microsoft login process. Once the Microsoft login process is complete, you will be logged in to **DFweb**.

If you don't see a login button or the username and password fields, your server only allows logging in with Microsoft.

NOTE: If you log in using a Microsoft Login, future signing requests in DFweb, such as eSignatures, will require you to authenticate using the same Microsoft login process.

Connection Issues

DFweb communicates with the DFdiscover server via API. If the user can connect to the DFweb server but not the API server, they will be unable to see their studies. The cause is often strict firewall rules implemented at the organization or site.

When this happens, a Connection issue detected dialog is shown.

Connection issue detected

Your network is blocking access to DFweb. This issue prevents you from using DFweb to access study data and perform other actions.

Network communication functioning

Cannot reach API dfws.dfdiscover.com

Required Action: Contact your IT department or network administrator with the details below to resolve this issue.

Please allow the following domain in your firewall or security settings:


- DFdiscover API endpoint: <https://dfws.dfdiscover.com>

[See more](#)

Click **See more** for additional details:

 Connection issue detected

 Network communication functioning

 Cannot reach API dfws.dfdiscover.com

Required Action: Contact your IT department or network administrator with the details below to resolve this issue.

Please allow the following domain in your firewall or security settings:

- Dfdiscover API endpoint: <https://dfws.dfdiscover.com>

DFweb is a web-based application for electronic data capture, part of the Dfdiscover clinical data management system. The DFweb URL is <https://dfweb.dfdiscover.com/?servername=hosted-1.dfdiscover.com>. DFweb communicates with the Dfdiscover server via API using HTTPS (port 443).

In order for DFweb to function on your network, the API domain must be allowed to prevent blockages in data flow and access issues.

For more details about Dfdiscover and DFweb's technical requirements, please see [DFweb Information for IT Teams](#)

For more details about Dfdiscover and DFweb's technical requirements, please see [DFweb Information for IT Teams](#)

[See less](#)

 Copy details for IT support

Close

Click [Copy details for IT Support](#) and send the copied information to your IT team. Refer to [DFweb Information for IT Teams](#) for IT guidance on resolving this issue.

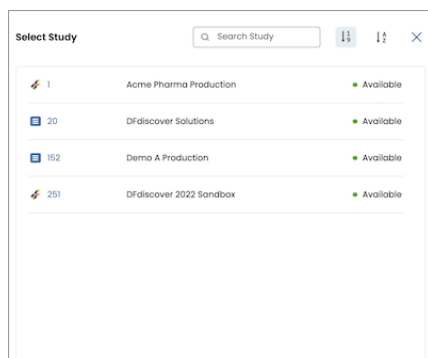
Cookies

DFweb uses cookies. Cookies are standard technology implemented in all web browsers. They are small pieces of data sent from a web server (the **DFdiscover** server in this case) and stored on the user's computer by the user's web browser, while the user is browsing. **DFweb** displays a notification and a hyperlink for more detail.

Further details on the usage of cookies in **DFweb** can also be found at <https://www.dfnetresearch.com/cookie-policy/>. Click [Accept](#) to confirm that you have read the notification and stop it from being shown in that browser again. If you have previously cleared the notification and need to see it again, clear the browser's cookies and site data, and refresh the page.

Study Selection

After a successful login, you will see the Select Study dialog if you have access to more than one study in **DFweb**. You won't see this dialog if you only have access to one study. Click on the appropriate study to open it.



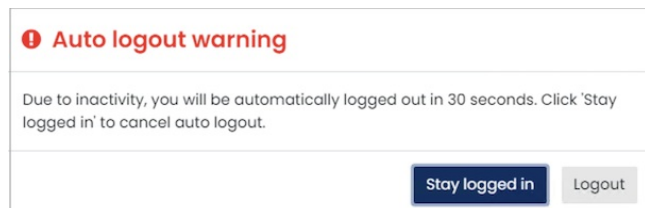
Study Number	Study Name	Status
1	Acme Pharma Production	Available
20	Dfdiscover Solutions	Available
152	Demo A Production	Available
251	Dfdiscover 2022 Sandbox	Available

To switch to another study, click the study name in the top middle part of the page to open the Select Study dialog again and choose another study, or click [X](#) in the top right to return to the current study. The Select Study dialog also includes options to search by study name, sort by study number, and sort by study name.

For subsequent logins, **DFweb** opens the last study you accessed, so the Select Study dialog won't appear unless you switch to another study. This can be changed by disabling the **Open Last Study on Login** setting on the [Settings](#) page.

Session Timeout

To maintain security, the **DFweb** login session is automatically closed if there is no activity for a certain period of time. By default, the auto logout timer is set to 10 minutes, but this may be customized for your study. A warning, with countdown, is displayed one minute before the session is closed. Click [Stay logged in](#) to continue to use **DFweb** and reset the timer.



Auto logout warning

Due to inactivity, you will be automatically logged out in 30 seconds. Click 'Stay logged in' to cancel auto logout.

[Stay logged in](#) [Logout](#)

In the event of session timeout, the following actions take place:

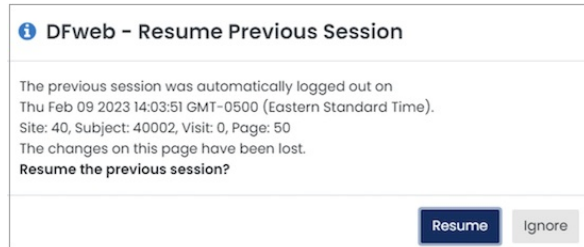
- an information dialog is presented to notify that automatic logout has occurred



- unsaved changes for the current CRF, if any, are discarded
- the lock for the current CRF, if any, is released
- you are logged out and taken back to the login screen

Never rely upon the session timeout to terminate a session. Always save changes to the current CRF and logout.

Following a session timeout, after re-login you have the option to resume your previous session.



Click **Resume** to return to the page you were on when the session ended, or click **Ignore** to continue the new session.

Logging Out

To exit from **DFweb**, choose **Logout** from the [Application Menu](#). After successful logout, the login window is shown.

When using **DFweb**, logging out via **Logout** in the [Application Menu](#) is the recommended and most secure way to exit **DFweb**. Although closing the page ensures your data is safe, it is best practice to logout properly.

If you use the browser's back button to navigate back to the login page, you will see the Logout Warning dialog informing you that continuing to the previous page will log you out of **DFweb**. Click **Cancel** to stay logged in and return to the current page. Click **OK** to continue logging out and return to the login page.

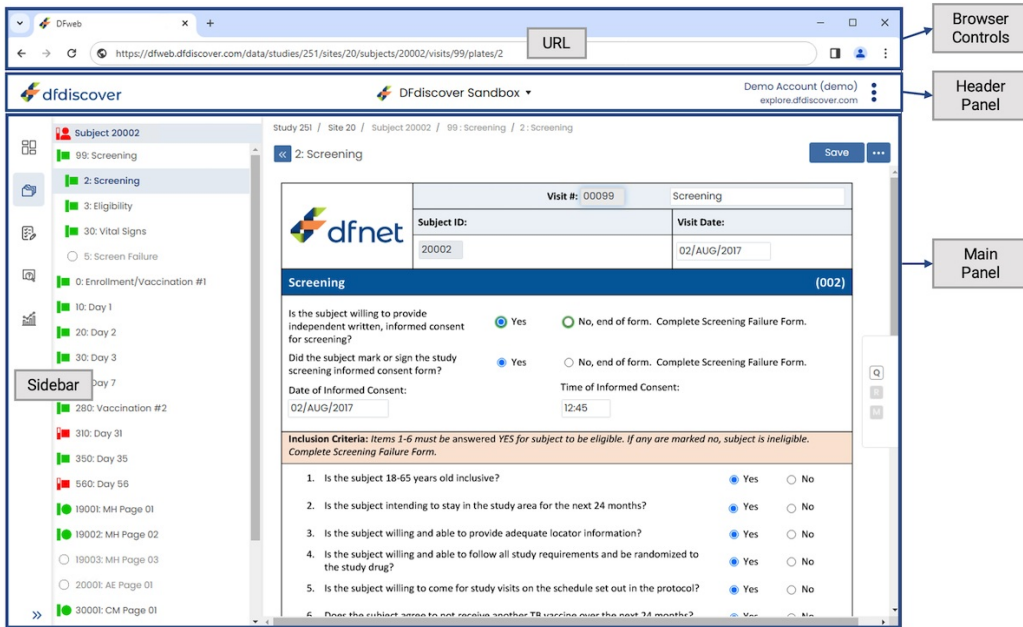
Application Overview

DFweb includes several key pages which are explained here. More detailed explanations of certain pages and functionality, as well as the menus and dialogs that appear on these pages are given in the following sections.

Overall Application Appearance

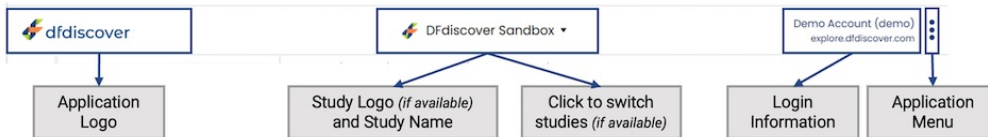
After logging in and selecting a study, you will be taken to the Subjects Page. The Subjects Page and other pages in **DFweb** share a similar layout.

Application Layout



The following features appear in the application layout:

- **Browser Controls.** Browser controls are specific to each browser and are not part of **DFweb**. In general, this area contains the URL for the content that is being viewed, buttons to move to the previous page (if one exists), the next page (if one exists) and refresh the current page, and controls for tabbed windows (if supported).
- **Header Panel** The header panel is available on all pages of **DFweb** except the login page. It contains options and navigation that are relevant for all pages, including:



- **Application Logo** The **DFdiscover** application logo appears on the left side of the header panel.
- **Study Logo and Name** This is the study logo (if available) and name of the current study. Click the study name or arrow icon to open the Select Study dialog and switch to another study. On small displays, this is available in the sidebar accessed from on the top left.
- **Login Information** Your full name, username, and **DFdiscover** server appear in the header panel. On small displays, this information is visible by tapping the icon.
- **Application Menu** The application menu contains several generic functions that are not study specific, including **Logout**. See [Application Menu](#) for more information.
- **Main Panel** The main panel contains the primary navigation, information, and interaction for the current page. The leftmost part of the main panel contains the sidebar with links to **Dashboard**, **Subjects**, **Tasks**, **Queries**, and **Reports**. The sidebar may be collapsed by clicking at the bottom of the sidebar, and expanded again by clicking . The sidebar will be collapsed automatically on smaller displays and on the [Subject Binder](#) page, or may be hidden entirely and accessible from the hamburger icon () on the top left. Pages that may appear in the main panel are [Dashboard Page](#), [Subjects Page](#), [Tasks Page](#), [Queries Page](#), [Reports Page](#), [Subject Binder](#), [User Profile Page](#), and [Settings Page](#).

Application Pages

Subjects Page

- Dashboard
- Subjects
- Tasks
- Queries
- Reports

Subjects

Total		23 Subjects
0	Error Monitor	0 Subjects
901	Seattle Grace Hospital	15 Subjects
902	Islandia Hospital	3 Subjects
903	Chicago Hope	1 Subjects 100%
904	Twin Peaks	1 Subjects
905	Tacoma General	3 Subjects

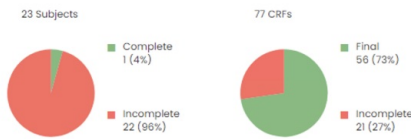
The Subjects page is the starting point for data entry and review for specific study subjects. The Subjects page is the landing page for each study, opened by default when entering or switching to a study, and can be accessed by selecting **Subjects** from the left-hand sidebar.

For more details on how to view, enter, and modify subject data in **DFweb**, see [Data Entry](#).

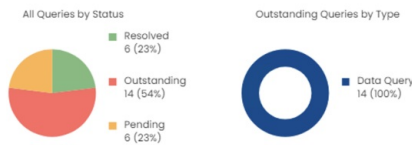
Dashboard Page

- Dashboard
- Subjects
- Tasks
- Queries
- Reports

Subject and CRF Status Overview



Query Overview



Subject Summary

Search by Subject:

Subject	Latest Visit	Next Visit	Days Overdue	Outstanding Queries
901-ABC-002	2024-04-17	2024-04-18	12	1
901-ABC-003	unknown	2024-02-29	61	0
901-ABC-004	2024-04-18	2024-04-18	12	2
901-ABC-005	unknown	2024-05-18	0	0
901-ABC-006	unknown	?	0	0
901-ABC-007	2023-11-14	2023-11-14	168	7
901-ABC-008	unknown	?	0	0

The Dashboard page is accessed by selecting **Dashboard** from the left sidebar. The Dashboard is a new page in DFweb giving the user a high-level overview of the study and providing a way to drill down to specific subjects, CRFs, and data fields to review data and resolve outstanding issues.

For more details on the dashboard in **DFweb**, see [Dashboard](#).

Tasks Page

- Dashboard
- Subjects
- Tasks
- Queries
- Reports

Tasks

- 6 Investigator Sign - Records requiring e-Signature from Investigator
- 2 Ongoing AEs - Displays all AEs marked as Ongoing
- 2 Outstanding Queries High Priorit - High priority forms with outstanding queries
- 0 Pending Monitor Queries - Queries ready for Monitor review of response Start

These are queries written by the Monitor and answered by the site. Montiros should review and resolve/re-query as necessary.

0 records match the search criteria

- 2 Pending Queries - Pending Queries
- 0 Pending Safety Queries - AE Form queries answered by site

The tasks page is accessed by selecting **Tasks** from the left-hand sidebar. It contains a list of the tasks you can run. Click on a task title to view any details and click **Start** to start the task.

For more details on how to use tasks in **DFweb**, see [Tasks](#).

Queries Page

- Dashboard
- Subjects
- Tasks
- Queries
- Reports

Queries

Showing 11 of 13

Site 901 - Seattle Grace Hosp

Any Category

Outstanding

Filter Download

Location	Query Header	Query Details	Age	Timing
901-ABC-002 Screening Demographics	Race Other = Unchecked (Missing) Outstanding	Detail: For items Race American Indian or Alaska Native through Race Other, at least one response must be given, but currently all are blank. Please review.	12 days	Modified: angela Apr 18, 2024 Created: angela Apr 18, 2024
901-ABC-004 Enrollment Serum Pregnancy Test	Serum Collection Date: = (Missing) Outstanding	Detail: Please review. Because Was a Serum Pregnancy Test Performed? is marked 'Yes', Serum Collection Date: is a required field, but currently it is blank.	11 days	Modified: angela Apr 19, 2024 Created: angela Apr 19, 2024
901-ABC-004 Enrollment Serum Pregnancy Test	Serum pregnancy test results: = blank (Missing) Outstanding	Detail: Please review. Because Was a Serum Pregnancy Test Performed? is marked 'Yes', Serum pregnancy test results: is a required field, but currently it is blank.	11 days	Modified: angela Apr 19, 2024 Created: angela Apr 19, 2024
901-ABC-007 Enrollment Physical Exam Screening	Time of Physical Exam: (24-hr clock) = (Missing) Outstanding	Detail: Please review. Because Was the physical exam performed? is marked 'Yes', Time of Physical Exam: (167 days	Modified: laura Nov 15, 2023 Created: laura Nov 15, 2023

The queries page is accessed by selecting **Queries** from the left-hand sidebar. From this page you can browse all the queries in the study. Double-click a query to open the CRF and place the focus on the field with that query.

For more details on how to use the queries view in **DFweb**, see [Queries View](#).

Reports Page

Dashboard

Subjects

Tasks

Queries

Reports

Reports

Grouped view

Search

AE Form queries answered by site

CRFs by Site

Cycle Visits

Cycles

Data Entry Time Trend

Database Definition

Displays all AEs marked as Ongoing

Enrollment by Site

High priority forms with outstanding queries

History of Changes

History of Subject Alias

Inbound Traffic

The reports page is accessed by selecting **Reports** from the left-hand sidebar. This page provides a list of all the **DFdiscover** reports you have access to. Click any report to open it in a dialog, where you can view the report and customize it with filters and other options. Some reports allow you to navigate to a subject or page in CRF view within DFweb.

For more details on how to view reports in **DFweb**, see [Reports](#).

ePRO Management Page

Dashboard

Subjects

Tasks

Queries

Reports

ePRO Management

ePRO Management

5 Total Registered

Site 902 - Islandia H

Search

Overdue

1

Due Now

1

Complete

1

Upcoming

1

Inactive

5

Click on a row to view or edit subject details

Showing 10 of 10

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

The ePRO Management page provides authorized staff with the ability to register study participants with the DFengage ePRO app, update participant contact details, track the overall ePRO status for each participant, provide support to participants with invitation and login links, and view audit and access logs.

For more details on ePRO management in **DFweb**, see [ePRO Management](#).

User Profile Page

dfdiscover DFdiscover 2024 Demo Demo Account (demo) explore.dfdiscover.com

Dashboard Subjects Tasks Queries Reports

User Profile

Profile

Full name: Demo Account
Username: demo
Email: info@dfnetresearch.com

Contact

Affiliation: DFnet
Address: 140 Lakeside Ave. Suite 310
City: Seattle
Postal Code: 98122 State: Washington
Country: USA Telephone: 1-206-322-5931

Your password expires in 0 days

Update

The User Profile page is accessed from the [Application Menu](#). When your **DFdiscover** user account was created, a user profile was defined for you. That profile includes your full name, username, and email address, and may include your mailing address and other contact details.

You may update the information in the **Contact** section at any time by making the changes and clicking [Update](#). Your full name, username, and email address cannot be updated here. Please contact your study coordinating center or **DFdiscover** administrator if your **Profile** requires updates.

When you first logged in and set a password, that password was given an expiry date. The number of days before your password expires is shown on this page, along with the option to change your password at any time. Click [Change Password](#) to set and confirm a new password after confirming your current password. If you logged in with a Microsoft login, the password expiry details and change password button will not be shown.

Settings Page

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

Dashboard Subjects Tasks Queries Reports ePRO

Settings

General About

Open last study on login

Use Subject Alias

Use HD Image

Auto-Download Documents

Load Subject Statistics

Auto-Load All Sites Dashboard

Disable Edit Checks

Show field navigation taskbar on desktop

Auto logout timer (min) 10 20 30 45 60

All timestamps are shown in UTC-04:00 (server time). Your local time zone is UTC-06:00.

The Settings page is accessed from the [Application Menu](#). The Settings page includes two tabs, one for **General** settings and one for **About** details.

Under the **General** tab, the settings listed below may be customized for the current study, by enabling () or disabling (), or selecting a different option. You may not be able to change some settings if they have been locked by the study coordinating center. If you change your settings, these settings will also be used in future login sessions in the same browser, unless the study coordinating center has configured default settings for you.

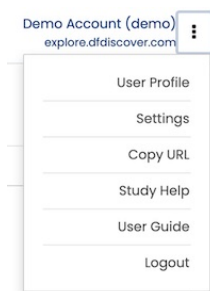
Open Last Study on Login	Toggle this option to enable or disable the behavior of opening the last study accessed when logging into DFweb, if you have access to more than one study. When disabled, you will be prompted to select a study each time you login. By default, this setting is enabled.
Use Subject Alias	The subject alias is an optional alternative to the default subject ID. This setting may be pre-configured and/or locked by the study coordinating center. Only enable this setting when instructed to do so. By default, this setting is disabled.
Use HD Image	For studies that include CRFs with backgrounds, there may be a high definition image available. Enable this setting to view the highest quality images, or leave it disabled for faster loading times. By default, this setting is disabled.
Auto-Download Documents	Toggle this option to enable or disable the behavior of downloading attached documents <i>as soon as a page is opened</i> . Enabling this can save time when most records have attached documents and the documents will be reviewed. Otherwise, for large documents or records with many documents, auto-downloading may cause performance issues and it is better to leave this setting disabled. By default, this setting is disabled.
Load Subject Statistics	Toggle this option to control whether subject statistics are displayed for all sites on the Subjects page. By default, statistics are not displayed. Enabling this setting will display statistics for all sites on the Subjects page. By default, this setting is disabled.
Auto-Load All Sites Dashboard	Toggle this option to control whether to view the dashboard for all sites or for individual sites only, when you have access to more than one site. This setting helps reduce loading times in large studies or on slow connections. By default, this setting is enabled, unless your access includes more than 1 million data records in total, when it is automatically disabled.
Disable Edit Checks	Toggle this option to disable or enable running edit checks in DFweb. When disabled, edit checks on a record won't run, though edit checks will still run when opening the study and the subject binder. This setting is only useable if your role has the DFexplore Miscellaneous -> May Disable Edit Checks permission. Without the permission, the setting is disabled and edit checks will always run. This setting is reset to the default disabled value every time you open the study. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">NOTE: Edit check execution is also affected by task definitions. Edit checks will not run if either the task or this setting disables them. They will only run if both the task and this setting allow them to run.</div>
Show field navigation taskbar on desktop	Toggle this option to control whether to display Previous and Next buttons at the bottom right of the data entry form on larger screens as well as smaller screens, to assist with field navigation. By default, this setting is disabled, and is only available to enable when allowed by the study team.
Auto logout timer	This setting indicates the number of minutes you may remain inactive in DFweb before you are logged out automatically. You will be warned 1 minute before you are logged out. This helps prevent unauthorized access to your account. This setting may be pre-configured and/or locked by the study coordinating center. By default, auto logout timer is set to 10 minutes.


In addition to the settings above, the **General** tab displays details about the time zone in UTC (Coordinated Universal Time) used for timestamps shown in **DFweb**, including the local time zone detected on your device. The accuracy of these time zones is dependent on your local device time being correct.

Under the **About** tab, the **DFweb** version and build details are provided along with a link to the build history and privacy policy.

Application Menu

The application menu provides functionality that is applicable for the entire study or user session. The following functions are available:








User Profile	Select User Profile to view information about your user account, including the option to change your password and update your contact details. See User Profile Page for more details.
Settings	Select Settings to view and update your DFweb settings for the current study and view information about DFweb such as the version number, build history, and privacy policy. See Settings Page for more details.
Copy URL	Select Copy URL to copy the URL of the current page to your device's clipboard. This allows you to easily share the URL with other users, and if they have permission to view the page, they are taken directly there after logging in.
Study Help	Select Study Help to open a dialog showing the study help, if it has been defined for this study. The content is displayed in the main body of the help dialog. Click  to close the dialog.
User Guide	Select User Guide to open the DFweb User Guide (this document) in a new tab in your browser.
Logout	Select Logout to exit out of DFweb and return to the login page. Remember to always logout after completing your work.











CRF Menu

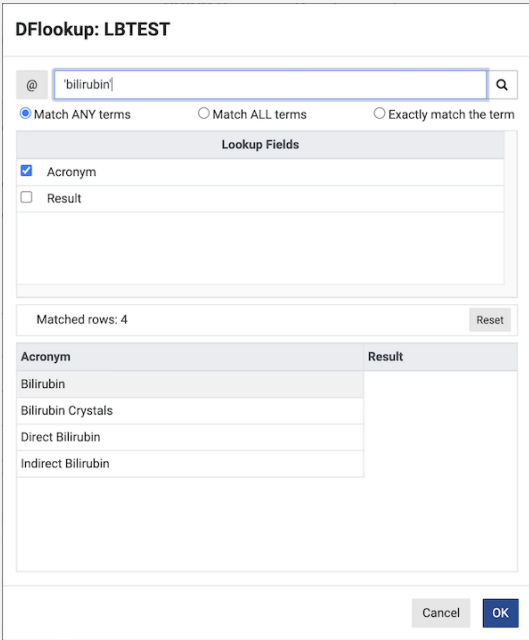

The CRF Menu is only visible on the Subject Binder page. It provides actions for the entire CRF. A file icon on the menu indicates that this CRF has documents attached. A loading spinner on the menu button indicates that the CRF documents are still loading. The following actions are available:

Manage Documents	Select Manage Documents to open the Manage Documents dialog. This allows you to add or view documents for the current CRF. A number to the right shows the number of documents on this CRF.	
Set Page Missed	Select Set Page Missed to the current CRF to missed status to indicate that the current CRF will not be completed. This option is only available on blank CRFs when allowed by user permissions.	
Unset Page Missed	Select Unset Page Missed to reset the current missed CRF to a blank page. This option is only available on missed CRFs when allowed by user permissions.	
View Page History	Select View Page History to view the history of changes (audit trail) for the current CRF.	
Reset Page	Select Reset Page to reload the current CRF, resetting all fields and other elements to the last saved value. If you have made changes since your last save, you are warned that continuing with the reset removes unsaved changes.	

Dialogs





Alert Dialogs	<p>Alert dialogs provide warnings of different events or states in DFweb. Information in alert dialogs is important, and you should read them carefully before closing them. Example alert dialogs include:</p> <ul style="list-style-type: none"> • Session Timeout Dialog If you have been away from DFweb for too long, DFweb logs you out. When this happens, a session timeout dialog is displayed. • Missing Permission Dialog Some actions, such as trying to directly navigate to a CRF using a URL, can result in a missing permission dialog if you do not have permission to view the study, site, subject, etc. Close this dialog to return to the closest level in the navigation that you have permission to access. • Data Was Modified Dialog Some illegal values cannot be accepted by the study server. If you save a CRF with such values, they are altered by the server, and you are notified by this dialog.
Confirmation Dialogs	<p>DFweb displays confirmation dialogs to warn you of the (potentially unintended) consequences of an action you are about to perform and to give you a chance to cancel the action. Some confirmation dialogs are:</p> <ul style="list-style-type: none"> • Unsaved Changes Dialog Resetting or navigating away from a CRF that has unsaved changes on it triggers an unsaved changes dialog. This dialog gives you a chance to stop the action and save those changes before continuing. • Save Plate Confirmation Dialog If you have entered values that cannot be saved as is by the DFdiscover server, when you save, DFweb warns you that these values may be modified, and give you a chance to go back to correct the values before saving. • Auto Logout Warning Dialog If you have been inactive in DFweb for an extended period of time, this dialog is shown with a countdown to the logout, allowing you to choose to continue your session before the countdown reaches zero.
Select Study Dialog	<p>If you have access to more than one study in DFweb, when you log in for the first time or with a new browser or device, the Select Study dialog will appear. Click a study from the list to continue in DFweb.</p> <p>All the studies you have access to are listed in the Select Study dialog. If a study cannot be opened right now, Not Available will appear on the right. Click to see the reason the study is not available. Use the Search bar to search for a study name, or sort the studies by name or number.</p> <p>After you have selected a study, if you want to switch to a different study, click on the study name in the header panel (on small displays, click  to open the sidebar and click on the study name there). Click any study to open it, which will take you to the Subjects page. To close the dialog without selecting a new study, click  in the top right.</p>
Study Help Dialog	Select Study Help from the Application Menu to open a dialog showing the study help. The content is displayed in the main body of the help dialog. Click  to close the dialog.
CRF Help Dialog	The CRF help dialog is displayed when the user clicks  beside the CRF label. Similar to the study help dialog, the CRF help dialog displays help content in the main section of the dialog, in this case, specific to the current CRF. The dialog is closed by clicking  .
Modified Values Dialog	<p>On occasion, a change in the study setup can cause a value to be saved to the study database that cannot be displayed in the field. In these cases, DFweb modifies the values as best as possible to make them fit in the field. You are notified of these modifications with this dialog when you open the CRF.</p> <p>The dialog shows you a list of all fields modified in this way. For each field, the dialog shows you the field label, a message explaining why the value was modified, the value in the database, and what the value is after the modification.</p> <p>Leaving the CRF without saving causes the modifications to be discarded and the database values to be preserved.</p>

<p>Attach Documents Dialog</p>	<p>The Attach Documents dialog provides a way to view and add documents to the CRF, and to download attached documents to your device. Documents are displayed in a list, and at the bottom of the list is an area for attaching a new document. Each document in the list is displayed as a row with the document name, the size of the document, an expand document button (), and a download button (). Click  to display the document in the dialog. Some document types cannot be displayed by the browser, so a message is shown in place of the document. Click  to download the document to your device. This is especially useful for documents that can't be viewed in the browser as it allows you to open the document with a program designed to open files of that type.</p> <p>To attach a new document to the CRF, click Choose Files. This opens a file chooser dialog. Select the file you wish to upload, and confirm the selection to close the dialog. Click Upload to attach the document.</p> <p>NOTE: The label of Choose Files may differ in the browser you are using.</p> <p>If the CRF has not been saved, attaching a document saves an empty version of the CRF with the status Pending and the document attached. Saving with the CRF save button is still required to save any changes you have made to field values. At the top right of the Attach Documents dialog is the Download All button (). This button downloads a zip file containing all the documents attached to the CRF. Click Cancel to close the dialog.</p>
<p>Change Password Dialog</p>	<p>The Change Password dialog is displayed when you select Change Password on the User Profile Page, when you login for the first time after being given a temporary password by the study administrator, or when your password expires. The text of the dialog indicates minimum password requirements.</p> <p>To change your password, enter a new password in New Password that matches the requirements. Then enter the same password again in Confirm Password. If the password does not meet the requirements or the new and confirm passwords do not match, an error message is displayed in red below Confirm Password. You may also be required to confirm your current password in Current Password. When you have entered both new and confirm password, and current password when required, and no error messages show, click Change to submit the new password to the server. If the password change is not successful you are notified by an error message. Click Cancel to close the dialog without changing your password.</p>
<p>Add Subject Dialog</p>	<p>The Add Subject dialog is displayed when you click  from the subjects list page. It permits you to create a new subject within the range of allowable IDs for the site.</p> <p>To create a new subject, enter the desired subject ID in Enter Subject ID. Enter the same ID in Confirm Subject ID. When you have entered an ID in both input areas and no errors are displayed, click OK to create the subject. The subject binder page for the new subject is displayed. Click Cancel to close the dialog without creating a new subject.</p>
<p>Query Dialogs</p>	<p>The Query Dialogs allow you to create (), edit (), reply to () and delete () queries for a field. Separate dialogs are used for each function. For a study in which multiple queries are permitted, there is an additional Multiple Queries dialog to view and initiate actions once a query has been created for the field. Click Q to open the query dialogs for the field. For more details on query dialogs and their use, see Queries.</p>
<p>Reason Dialogs</p>	<p>The Reason Dialogs allow you to create, edit, and delete reasons for a field. Separate dialogs are used for each function. Click R to open the reason dialog. For more details on the reason dialog and its use, see Add a Data Reason.</p>
<p>Missing Value Dialog</p>	<p>The Missing Value dialog allows you to set (or unset) a missing value for the field. Click M to open the Missing Value dialog. For more details on missing values and their use, see Mark a Data Value as Missing.</p>

<p>Lookup Table Dialog</p>	<p>Certain edit checks may offer the opportunity to select a value from a lookup table. The behavior of lookup tables in DFweb is identical to the behavior in DFexplore. For further information, refer to DFexplore, Using Lookup Tables.</p> 
<p>Task List Dialog</p>	<p>When viewing a record as part of a task, click View Tasks to open the task list dialog. This dialog can be used to view the current task's details, and switch to a new task. See Tasks for more information on tasks.</p>
<p>Query Filter Dialog</p>	<p>When viewing the query list, or the query binder, click  to open the query filter dialog. Update the filters to change which queries are shown. To learn more about the queries view and query filter dialog, see Queries View.</p>
<p>Error Dialogs</p>	<p>On occasion DFweb may experience a problem resulting in an error dialog. This can be caused by a problem in network connectivity, the server, or DFweb itself. The dialog content gives details as to the cause of the error. Further detail regarding some errors can be found below. Depending on the error, you may be taken to a different page, or logged out, on closing the dialog.</p> <ul style="list-style-type: none"> • Server Internal Error This error is caused by an issue connecting to the DFweb server. This may happen if an internet connection is unavailable, or if the DFweb server is otherwise unavailable. Closing this dialog will log you out. Check your network connection and try again. If the error persists, contact your study administrator. • API Error This error is caused by an issue connecting to the API server. This may happen if the API server is unavailable, or due to a problem in the study setup. The contents of this dialog provide more information on the nature of the issue. You may be returned to a previous page when closing this dialog. • Website Problem DFweb has crashed due to unexpected actions, input or changes in the browser. Expanding the details section reveals information useful for the DF/Net team in resolving the crash. Closing the dialog will return you to the current screen so you can copy any unsaved data. Refresh DFweb using your browser's refresh button to recover from the crash. If the crash persists, contact your study administrator, including the content of the details section.

Responsive Elements

DFweb adapts the content to fit displays of different sizes. Largely this is done by adjusting the spacing on the page, however greater changes are made when the display becomes too small. Some of the more significant changes are detailed here.

<p>Sidebar Visibility</p>	<p>To allow more room for the main content, the application sidebar is hidden on small displays. When it is hidden, a new button  is added at the top left of the page. Clicking this button opens the sidebar, where you can navigate to another application page or switch studies. Click  again or anywhere outside the sidebar to hide it again.</p>
<p>Login Information Visibility</p>	<p>On small displays, the login information is hidden from the main view. Click  to view your login information in a tooltip.</p>
<p>Subject Binder Sidebar Visibility</p>	<p>To allow more room for data entry and review, the subject binder sidebar is hidden on small displays. When it is hidden, a new button  is added beside the CRF page title. Clicking this button opens the subject binder sidebar, where you can navigate to another CRF page in the binder. Click anywhere outside the sidebar to hide it again.</p>
<p>Field Arrangement</p>	<p>On small displays, the organization of the fields on eCRFs also changes. The input area, date picker, units, reset button, and warning message are moved below the rest of the elements of the field, allowing enough room for all elements to be visible and usable. For CRFs with backgrounds, or eCRF tables that are set to static width, field layouts remain the same on small screens.</p>

Input Validation for Security Compliance

Cross-site scripting (XSS) attacks occur when an attacker injects malicious code into a trusted website so it runs in another user's browser. To prevent against XSS attacks,

your study may enforce additional security compliance by performing input validation on data entered in **DFweb**. If any issues are found with any information entered, you will receive the below message:

ⓘ Data adjusted for security compliance.

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

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

OK

If you receive this message, review your data carefully before saving to ensure it remains complete and accurate.

This option is enabled via **DFadmin** by the study or system administrator. If your study will be collecting HTML-based content in fields, you may not want to enable this option.

Terminology

A glossary of frequently used terms is presented below.

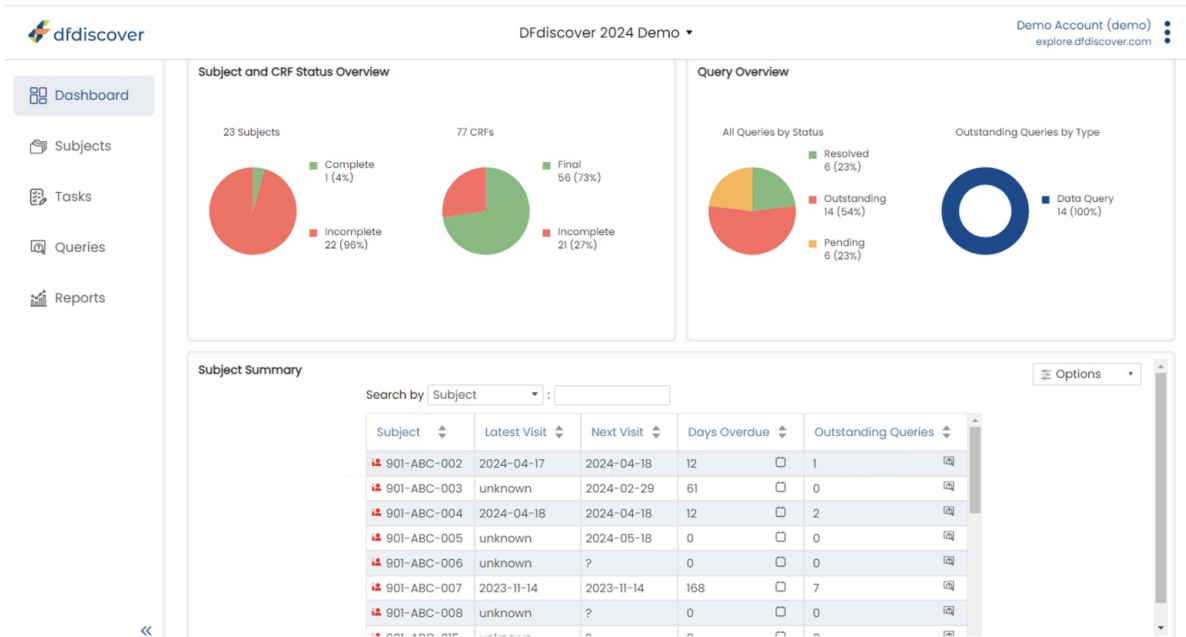
Document	A document is a file that is, or will be, attached to a CRF. Documents can be images, PDFs, videos or other file types.
eCRF	Electronic case report forms (eCRFs) are CRFs (as described below) where the layout of the fields is handled by DFweb , and where no background image is displayed. eCRFs may arrange fields in individual rows in a column or in a table or grid format. The layout of the fields may adjust as the window size changes, or tables may remain a static width at smaller screen sizes, depending on the study setup.
Field	A field is a single data value and optional related metadata, including queries, the reason for the data value, possibly a missing value, and other descriptive information about the field, such as its label and help.
Final (Status)	Final is a record status. A record can have status Final if there are no missing required fields, no illegal values and no outstanding queries. DFweb decorates Final records with a green shaded rectangle (see also Incomplete and Pending).
Incomplete (Status)	Incomplete is a record status. A record can be saved with status Incomplete if it has one or more fields which are incomplete (required and missing) or illegal, or outstanding queries. A blank record may have an Incomplete status if it has an overdue visit or missing page query, meaning the page is expected but not yet submitted. DFweb marks Incomplete records with a red partially shaded rectangle (see also Final and Pending).
Missed (Status)	Missed is a record status. A missed CRF is a page that will not be completed, for example if an expected procedure was not performed at a visit or a form is not applicable for specific subject. DFweb marks Missed records with an empty grey square, circle, or subject icon with a dashed outline.
Missing Value	A missing value is used to identify a field that is known and accepted as empty. A missing value allows even a required field to be blank and for the CRF to still be saved as Final.
New (Status)	New is a record status. A new record is a placeholder for data that has been entered but not saved yet. It can be a useful reminder for records which are expected but are not yet entered/saved. DFweb marks new records by an empty grey square, circle, or subject icon without a rectangle.
CRF with Background	Case Reports Forms (CRFs) with backgrounds are CRFs where the fields are laid out with specific sizes and locations relative to a background image. As the positions are fixed, the layout of the fields is not adjusted as the window size changes.
Pending (Status)	Pending is a record status. During entering a new data, a record can be saved with status Pending to indicate that data entry is still in progress, it has been started, not yet finished and you plan to return to it shortly and do not move to higher levels until they are saved with status Final or Incomplete. Pending records are typically not visible to or reviewed by the study coordinating site until they progress to Incomplete or Final status. Pending records are also not generally reported in summary listings. DFweb saves CRFs as Pending after a document has been added to a new CRF but no data entry has been done. DFweb marks pending records with an orange empty rectangle.
Plate, or CRF	Plate and CRF are terms used interchangeably to refer to a logical grouping of data fields, presented with a layout determined by the study sponsor, to fit on a single sheet of paper, or single webpage. Each CRF may stand alone, or CRFs may be grouped into multi-CRFs. A collection of CRFs constitute a visit, and a collection of visits constitute the subject binder, which holds all study data for an individual subject.
Query	A query is a question or comment about an individual data value. The study coordinating site may add a query to any data field to ask a question about the field, or request a correction or clarification. A query is metadata about the data value, or lack thereof, in the field, DFweb identifies query status by applying color to the field. A field with an outstanding query is blue. When a reply is provided to a query, or a reason is added to explain the field, the color is updated to orange, and when the field has been corrected, or the reply or reason have been approved, the color changes to green, provided there are no other outstanding queries on the field.
Reason	A reason is metadata used to explain the value in a data field. It is particularly useful as a way of explaining unusual values and thereby avoiding a data query from the study coordinating site. DFweb colors fields with a new reason orange and gives them a Pending status. If the coordinating site accepts the reason, the field color changes to green and the reason status changes to Accepted. If they do not accept the reason, the field color changes to blue and the reason status changes to Rejected. A reason can be modified, which starts the review process over again.
Save	None of the changes made to a CRF are saved to the study database until you click Save . If you leave the computer without saving your work, DFweb will time-out after a few minutes and any un-saved changes will be lost.
Screen	A screen is an optional grouping of fields on a CRF. On smaller displays, screens can be useful for grouping fields to ensure that they are seen together. DFweb indicates screens using a tab, and multiple screens in a CRF are stacked vertically.
Subject	A subject is an individual participating in a clinical study and for whom data is collected. Subjects are identified by subject ID (a unique numeric identifier), according to conventions established by the study coordinating site.
Subject Binder	A subject binder contains all of the required and optional data collection forms used to collect study data for an individual subject. Within DFweb , subject binders are displayed in a list by subject ID, with an associated icon that indicates whether the binder is empty or contains recorded data, and whether that data is currently Final, Incomplete or Pending.
Visit	A visit is a study timepoint at which one or more CRFs for a subject are completed, or a repeating log form such as an adverse event or concomitant medications. The duration of a subject's participation in a study is often marked by a baseline visit, several repeating visits, and a termination visit.

Dashboard

Dashboard Description

The Dashboard page offers a summary of study subjects, CRFs, queries, and data quality metrics, enabling you to identify key issues and upcoming visits and to interact directly with CRFs to enter and update data or resolve queries. The dashboard also displays study help information, if defined.

Warning: The Dashboard is only available when **DFweb** is connected to **DFdiscover** server and API version 5.7 or later.



The dashboard shows the following five tiles. The first four tiles are pulled from standard DFdiscover reports.

Subject and CRF Status Overview	The first chart shows all subjects by status (complete or incomplete). Incomplete subjects have outstanding queries, which may include overdue visits or missing pages. Complete subjects have no outstanding issues at the time the dashboard is updated. The second chart shows all CRFs by status (final, incomplete, missed, or pending).
Query Overview	The first chart shows all queries by status (resolved, outstanding, or pending). The second chart shows all outstanding queries by type (data query, missing page, or overdue visit).
Subject Summary	<p>This table shows a listing of subjects with upcoming visits or outstanding queries, including the number of days the next visit is overdue, if applicable.</p> <p>To view a subject's visit schedule, click the cell in the Days Overdue column. Click any visit to open it on the Subjects page. To view a subject's outstanding queries, click the cell in the Outstanding Queries column. Click any query in the list to go to that data field on the Subjects page. Use the browser's back button to return to the Dashboard, and click the back arrow in the top left of the tile to return to the main report.</p> <p>By default, only active subjects are shown in this list (upcoming visits or outstanding queries). Click the Options button to update the list to show only complete subjects (all visits completed, no outstanding queries) or all subjects.</p> <p>This table is limited to displaying 3000 subjects at one time (counting both active and complete subjects). If the dashboard shows more than 3000 subjects, use <i>Next</i> and <i>Previous</i> below the table to navigate between the sets of subjects. Note that searching and sorting only apply to the subjects currently displayed in the table.</p>
Query and Data Entry Metrics	This report shows a set of standard data entry and query metrics. Click the Options button to hide any metrics not relevant to you.
Study Help	This tile displays information provided by the study team. If there is no study help defined, this tile will not be shown.

The first three reports are interactive and allow you to open a subject binder or specific CRF or data field directly from the dashboard. In the first two tiles, click a segment of the chart or a legend marker to open a table listing of those subjects, CRFs, or queries. All chart sections are clickable except for resolved queries. In the table listing, click any entry to open it on the Subjects page. Use the browser's back button to return to the Dashboard page, or click the *Dashboard* link in the left sidebar.

When opening a query from a table listing on the Dashboard, the Queries panel on the Subjects page includes all queries from the table listing, so that you can navigate through the list of queries without returning to the dashboard.

In any table listing on the Dashboard, use the up and down arrows to change the sort order of the rows in the table, or use *Search by* to filter the list by a value in a specific column, just as in the tabular listing reports on the Reports page. Note that table listings are limited to displaying 3000 rows at a time. Use the site filter or search and sort within the table to view the desired results. For the Subject Summary table only, use *Next* and *Previous* to view additional rows.

By default, the Dashboard displays data for all sites you have access to. If you have access to multiple sites, use the filter at the top right to view dashboard data for the selected site only. The selected site is maintained for the entire session, but logging out will reset site selection to all sites you have access to. You can choose to display site-specific dashboards only by turning off the *Auto-Load All Sites Dashboard* option on the *Settings* page.

Each report loads separately. If a report fails to load or you do not have permission to view it, the tile will indicate that the report could not be loaded.

The dashboard reports are cached for 30 minutes unless a refresh is requested by clicking the refresh button next to the site filter dropdown. If you open a dashboard report on the Reports page, the data in reports view is also updated.

Dashboard Limitations

The dashboard is currently limited for studies or sites with a high volume of data.

If you have access to multiple sites with more than 1 million records in total, the dashboard will automatically filter to show data for the first site you have access to, instead of the dashboard for all sites, and show an error message indicating this change. Only site-specific dashboards will be available in this case, and the *Auto-Load All Sites Dashboard* option on the *Settings* page will be automatically disabled.

If a specific site also includes more than 1 million records, the dashboard will not display the Subject and CRF Status Overview, Query Overview, or Query and Data Entry Metrics tiles. The Subject Summary tile will remain available for sites with a high volume of data, displaying up to 3000 subjects at a time.

Data Entry

Subjects Page

The Subjects page contains a list of the sites you have permission for. The site number and label are shown for each site, along with an indicator of the number of subjects at the site and a progress bar displaying the percentage of subjects with complete data so far. At the top of the list of sites, the total number of subjects and a progress bar displaying the percentage of subjects at all sites with complete data so far. Hover over any progress bar to see more details.

The screenshot shows the 'Subjects' page in the Dfdiscover 2024 Demo. The page has a sidebar with navigation options: Dashboard, Subjects (selected), Tasks, Queries, and Reports. The main content area is titled 'Subjects' and features a search bar and a list of sites. At the top, a 'Total' row shows 23 Subjects with a progress bar. Below it, a table lists sites with their IDs, names, and subject counts, each with a progress bar. The 'Chicago Hope' site (ID 903) has 1 Subject and is 100% complete.

Site ID	Site Name	Subjects	Progress
Total		23 Subjects	
0	Error Monitor	0 Subjects	
901	Seattle Grace Hospital	15 Subjects	
902	Islandia Hospital	3 Subjects	
903	Chicago Hope	1 Subjects	100%
904	Twin Peaks	1 Subjects	
905	Tacoma General	3 Subjects	

By default, subjects statistics are not displayed. Enable Load Subject Statistics on the [Settings Page](#) to show the Total row and statistics for all sites.

Click one of the sites to open the list of available subjects at that site. If you have access to only one site, the list of subjects will open automatically.




Subjects Page with Site Selected

The screenshot shows the 'Subjects' page with the 'Seattle Grace Hospital' site (ID 901) selected. The main content area displays a list of 15 subjects for this site, each with a status icon (red for incomplete, green for final) and a subject ID. The list is scrollable. Below the list, a summary row shows 3 Subjects for Islandia Hospital and 1 Subject for Chicago Hope (100% complete).






Site ID	Site Name	Subjects	Progress
901	Seattle Grace Hospital	15 Subjects	
901-ABC-001			Incomplete
901-ABC-002			Incomplete
901-ABC-003			Final
901-ABC-004			Incomplete
901-ABC-005			Final
901-ABC-006			Final
901-ABC-007			Incomplete
901-ABC-008			Incomplete
902	Islandia Hospital	3 Subjects	
903	Chicago Hope	1 Subjects	100%

Click a subject to open the subject binder. The icon to the left of the subject ID shows the current status of the subject binder. The status may change over the duration of the study as more visits become required and further data review takes place.

- The subject binder is final, all data required at this time has been submitted, and there are no outstanding responses or missing, required values.
- The subject binder is incomplete. There may be missing required values, illegal values, unresolved questions about the data, overdue visits, or missing pages.


-  The subject binder is pending. There is at least one document attached to the subject ID, but otherwise there is no data yet.
-  There is no data for this subject, or the subject has not yet been saved.
-  The subject binder is missed. All pages for this subject so far are missed, and no pages are final, incomplete, or pending.

The Subjects Page also provides the following functionality when a site is open:

- **Search Bar** The search bar allows you to quickly navigate to a subject with a given subject ID. As you type, the list of subjects automatically filters to show only those subjects containing what you have entered. Click **[Enter]** to open the Subject Binder for the first filtered subject.
- **Add Subject** Click  to open the **Add Subject Dialog** see [Dialogs - Add Subject Dialog](#).
- **Sorting** Click  or  to change the sort order. This toggles between increasing and decreasing subject ID ordering.  indicates that currently the subject IDs are sorted numerically in ascending order.  indicates that the current sort order is descending.

Selecting a Subject

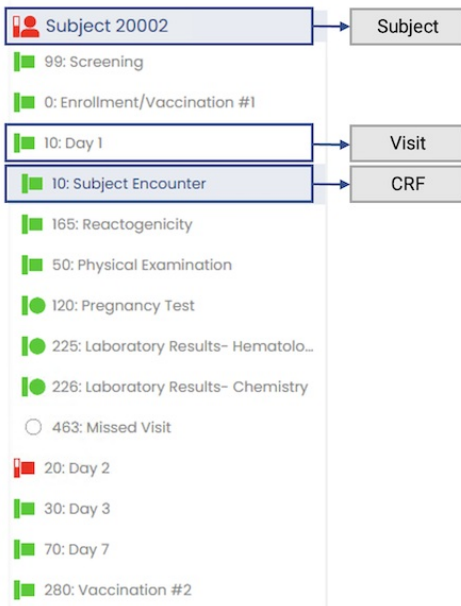
On the Subjects page, click a subject ID from the list to open the subject binder.

If the subject ID you need is not in the list, click  to add a new subject. This opens a dialog with two text input fields. Enter the subject ID (or alias) to add to the current site. Confirm the subject ID (or alias) by entering it again. Click **[OK]** to confirm the subject creation, or **[Cancel]** to close the dialog without creating a subject.

Subject Binder











The Subject Binder contains all the information of the visits and plates related to a subject. The initial page you are taken to is the first visit and CRF for the subject.

Subject Binder Sidebar



The sidebar displays the current subject, visit, and CRF, as well as providing navigation between CRFs and visits. The current subject is displayed at the top of the sidebar. The rest of the sidebar displays all the visits for this subject that you have permission to view. The current visit is expanded to show all the CRFs in that visit that you have permission to view. CRFs are indented slightly from the visits to help visually differentiate them. CRF and visit labels follow the format [Number]: [Label].

Each visit and CRF has an icon that displays its current status. The meanings of the icons are:

-  - This CRF or visit is final, and it is a required CRF or visit.
-  - This CRF or visit is incomplete, and it is a required CRF or visit.
-  - This CRF or visit is pending, and it is a required CRF or visit.
-  - This CRF or visit is missed, and it is a required CRF or visit.
-  - This CRF or visit has not been saved, and it is a required CRF or visit.
-  - This CRF or visit is final, and it is an optional CRF or visit.
-  - This CRF or visit is incomplete, and it is an optional CRF or visit.
-  - This CRF or visit is pending, and it is an optional CRF or visit.
-  - This CRF or visit is missed, and it is an optional CRF or visit.
-  - This CRF or visit has not been saved, and it is an optional CRF or visit.

- - This CRF or visit is final, and it is an unexpected CRF or visit.
- - This CRF or visit is incomplete, and it is an unexpected CRF or visit.
- - This CRF or visit is pending, and it is an unexpected CRF or visit.
- - This CRF or visit is missed, and it is an unexpected CRF or visit.

Click a CRF in the current visit to make it the current and displayed CRF. Click another visit to make that visit current and to display the first CRF in that visit.

Add New Visit

The **Add New Visit** option is available to add visits which do not already appear in the subject binder. This option is available at the bottom of the list of visits in the subject binder, and is disabled if not allowed by the study coordinating center. Click to select one or more visits to add to the binder for this subject.

Add New Visits

↓ 1/9

- 501-520 Unscheduled Visit #01+
- ▼ 401-450 Protocol Deviation #01+
 - 401 : Protocol Deviation #01
 - 402 : Protocol Deviation #02
 - 403 : Protocol Deviation #03
 - 404 : Protocol Deviation #04
 - 405 : Protocol Deviation #05

Cancel Add

Data Entry Form

The main part of the page contains the data entry form. This form allows you to view, add and modify data, queries, reasons, and missing values, and view and add documents to the form.

The top part of the data entry form displays the CRF header (outlined in orange below), while the bottom part displays the CRF page (outlined in blue below). The CRF page may be presented as either an eCRF or a CRF with a background, depending on the study setup for the plate. The metadata icon panel floats on the right edge of the window (outlined in green below).

Study 251 / Site 20 / Subject 20018 / 0 : Enrollment/Vaccination #1 / 1 : Demographics

1: Demographics Save ...

Header

Visit Code	Subject ID	Visit Name	Visit Date
00000	20018	Enrollment/Vaccination #1	DD/MMM/YYYY

Eligibility

* 1. Did subject meet all eligibility criteria? Yes No
[Reset](#)

2. Date of Informed Consent: [📅](#)

3. Time of Informed Consent: 24-hour

Demographics

* 4. Age at Inclusion:

* 5. Sex: Male Female [Reset](#)

* 6. Ethnicity: (select one) Hispanic or Latino Not Hispanic or Latino
 Not Reported Unknown [Reset](#)

?
Q
R
M

eCRF

Study 251 / Site 20 / Subject 20018 / 0 : Enrollment/Vaccination #1 / 30 : Vital Signs

30: Vital Signs Save ...

Header

Subject ID	Visit Date
20018	01/FEB/2023

Vital Signs (030)

1. Were vital signs collected? Yes No

2. Weight: Not Done
 kg lb

3. Height: Not Done
 cm in

4. Oral Temperature: Not Done

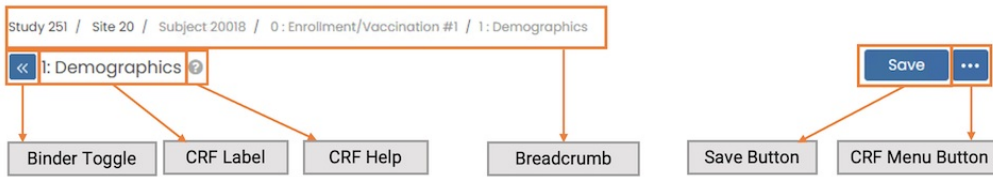
5. Pulse Rate: Not Done

6. Blood Pressure: Not Done

?
Q
R
M

CRF with background

CRF Header




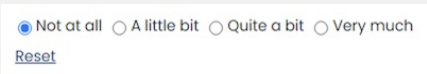
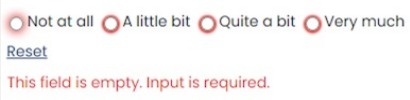



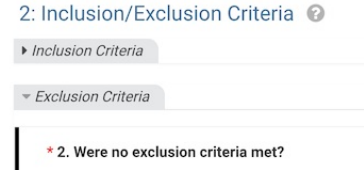
The data entry form header section provides CRF-wide information and actions and remains visible as you scroll through the CRF contents.

Breadcrumb	The breadcrumb is a navigation aid displaying information about the current study, site, subject, visit, and page. Click the site or study number to return to the Subjects page.
Binder Toggle	The binder toggle button allows you to collapse and expand the subject binder as needed. This can be useful on smaller laptop or desktop screens. On smartphone screens, the subject binder is collapsed automatically.
CRF Label	The CRF label is composed of the CRF number and label. These follow the format [Number]: [Label].
CRF Help	If CRF help has been provided for this CRF in the study setup, appears in the header area. Click to open the CRF Help Dialog , see Dialogs
Locked CRF Icon	If the CRF is in use by another user, appears to the left of [Save] . This indicates that no editing can be done on this CRF.
Missed Page	If the CRF has been set as missed to indicate it will not be completed for this subject, "Missed" appears to the left of [Save] . This indicates that no editing can be done on this CRF. To see the reason the page is missed, view the Page History from the CRF menu.
Read Only	If the CRF is view only based on your study permissions, "Read Only" appears to the left of [Save] . This indicates that no editing can be done on this CRF.
CRF Menu Button	Click or to open the CRF Menu , which contains CRF level options including managing documents, viewing page history, setting and unsetting missed page status, and resetting the data entry form.
Save Button	Click [Save] to save the changes you have made to the current CRF and submit them to the server. [Save] is disabled if no changes have been made to the form. Hover your mouse over [Save] to display a tooltip with the last saved time (in the server time zone, shown as UTC offset), the CRF status, and the workflow save level details.

CRF Page

The CRF page contains the data fields defined for this form along with data entry aids to assist with data entry and review. The CRF may be in the eCRF style or the CRF with background style, depending on the setup for the plate. The CRF page may include the following elements:

Field Input	Each field has an input area. The type of input determines exactly what appears in this area. For more information on input types, see Data Types .
Field Label and Instructions	Field labels indicate what information needs to be entered in the input area. Instructions may also be provided in addition to field labels.
Focus Indicator	The field with the current focus (where the cursor is located) displays an outline around the field input area. The outline color is light blue unless the field has a colored border as described under Field Status Colors .

Field Status Colors	<p>Field inputs are outlined in a specific color to indicate their status and the presence of metadata:</p> <ul style="list-style-type: none"> • Blue = outstanding query or rejected reason • Orange = pending query or reason • Green = resolved query, approved reason, or missing value code • Red = illegal or invalid value or blank required field • Black = no metadata or data problems
Required Indicator	If the field is required or essential, * appears in the field label. Fields with this indicator display a warning if left blank.
Keyboard Navigation	Navigating from field to field is possible using the Tab key. The Save button, if enabled, is tabbed to after the last field. Within choice fields (shown as either radio buttons or dropdowns), the up and down arrow keys can be used to switch between options, and the option can then be selected using the Space key. Within visual analog scale (VAS) fields, the left and right arrow keys can be used to select a point on the scale. Use the Backspace or Delete key to remove a value from a choice or VAS field, or the Reset option if available.
Field Formats	Some fields only accept specific data formats. Field formatting is shown in the blank field to help guide data entry. For example, a date field may have the format YYYY/MM/DD or a lab result field may have the format nn.nn.
Date Picker	Date fields have a date picker  that becomes visible when the field is focused. Click to reveal a calendar. Picking a date in the calendar is equal to typing it in the field input.
Reset button	<p>For choice and Visual Analog Scale (VAS) fields, use the Reset to clear the value from the field.</p> 
Units	If units are defined for the field, they are shown in or near the input area. Where they are displayed may change depending on the type of input.
Validation Warnings	<p>If you enter an illegal or invalid value, enter data in an incorrect format, or leave a required field blank, a warning is displayed below the input field describing the problem while the field has focus and the field is outlined in red. Correcting the value removes the warning and avoids queries.</p>   
Help	In addition to the description for each field on the CRF, Help information may be available for each field. This is indicated with a  icon in the metadata icon panel. Click it to view the Help message. Click anywhere outside the tooltip to close it.
Field Skipping	When navigating fields on a CRF using the Tab key, some fields may be skipped. This indicates that the field skipped is not required and can remain blank.
Screens	<p>Some eCRFs may be divided into multiple screens. A screen has a main body for data as well as a clickable tab to control visibility. In the tab, click the arrow to collapse the fields within that screen, and click again to expand. By default, all screens are expanded when you open a CRF. The tab with the input focus cannot be closed.</p> 

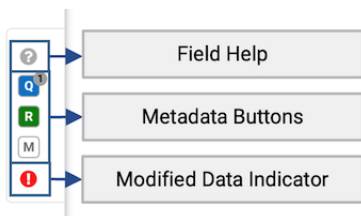
Differences between eCRFs and CRFs with background

The above CRF page elements may differ in the following ways for eCRFs and CRFs with backgrounds:

- **Field labels and instructions** on eCRFs outside a table are displayed according to the field prompt or description and field instruction properties defined in the study setup. For eCRF fields inside a table, the table headers and cell contents provide the labels and instructions. For CRFs with background, all labels and instructions are provided on the CRF background.
- **Required indicator** does not appear for fields on an eCRF contained in a table or on a CRF with a background.
- **Validation warnings** do not appear for fields on an eCRF contained in a table or on a CRF with a background.

- **Units** defined in the unit property in the study setup do not appear on CRFs with a background.
- **Screens** do not appear on CRFs with a background.
- **Reset option** is not available for choice (radio buttons) and VAS fields for fields on an eCRF contained in a table or on a CRF with a background.
- **Dynamic fields:** Some fields on an eCRF may only appear on the form as values are entered, so that data fields that don't require a response for this subject or visit are not displayed.
- **Responsive design:** Some eCRFs will adapt to smaller screen sizes, making data entry and review easier on tablets and smartphones. CRFs with backgrounds will display at the same size regardless of screen size, requiring horizontal scrolling on smaller screens. eCRFs with tables may display at the same size regardless of screen size or adapt the display to smaller screen sizes, depending on the setup for the plate.

Metadata Icon Panel



The metadata icon panel provides the following for the currently selected field:

- **Field Help** - If help has been defined for the current field, is visible. Click to display a help tooltip, which can be dismissed by clicking any other area of the page.
- **Metadata Indicators** - , , and show the status of each type of metadata: Queries, Reasons, and Missing Values. Blue indicates outstanding query or rejected reason, green indicates resolved query, approved reason, or missing value code, and orange indicates pending query or reason. Click the appropriate button to add, view, or modify metadata. For more information on queries, reasons, and missing values, see [Metadata](#).
- **Modified Data Indicator** - If a value in the field is unable to be displayed in the input area, it is modified when you open the CRF. shows which fields have been modified. Click the indicator to display more information about the change.

Field Navigation Taskbar

An optional field navigation taskbar may be available to assist with navigating across fields on smaller screens (tablets and phones) when a keyboard or mouse are not available. When this option is enabled by the study team, **Previous** and **Next** buttons are shown on the bottom right side of the data entry form. Click the buttons to navigate to the next and previous fields without having to scroll or tap.

When this option is enabled, by default it is available on smaller screens only, however if you wish to also display the field navigation taskbar on larger screens as well, this may be enabled on the [Settings Page](#) using the **Show field navigation taskbar on desktop** option.

Locking

When you enter a subject binder and the CRF becomes visible, **DFweb** attempts to establish a lock on the CRF. If it succeeds, you gain the lock on the CRF and other **DFdiscover** apps won't be able to edit the CRF until it is unlocked. If someone else already has the lock, your attempt fails and you are shown the locked CRF in read-only mode.

A locked CRF is indicated by a beside the save button. When a CRF is locked, all data fields are in read-only mode, meaning no data can be entered, and no queries, reasons, or missing values can be added to the field. Existing queries, reasons, and missing values can still be viewed by clicking the appropriate button, however all input fields and actions other than cancel are disabled. The Manage Documents dialog is accessible for document review, however no new documents can be uploaded to a

locked CRF. Finally, **Save** and **Reset Page** are disabled on a locked CRF.

Exiting a CRF, whether by navigating to another CRF, exiting the subject, or logging out, unlocks the CRF.

Clearing Data Values

In fields where you can type a value, deleting the value is sufficient to remove the data value. In check fields, removing the check removes the value. In choice and VAS fields, use the Delete or Backspace key to remove the data value, or click **Reset** if available.

The missing value dialog may also be used to clear the data on choice and VAS fields. Open the missing value dialog, and select **No Code (Reset)** from the **Code** dropdown. Click **Apply** to close the dialog and remove the current field value.

Data Types

Number	Numeric digits (0-9), decimal <input type="text" value="."/> , and a sign symbol <input type="text" value="+"/> or <input type="text" value="-"/> can be entered in number fields. If a decimal or other character is required, it can be typed directly. Otherwise, it is entered automatically to match the required format for the field.
String	Any text may be entered in a string field. A maximum field length may be defined which limits the number of characters that can be entered. If the maximum length for the string is longer than the input area can display, the string field will show as a resizable field.
Date	Enter dates using the keyboard, or use the date picker to select a date. The date picker is always visible on date fields in eCRF plates unless in a table. On CRFs with background, the date picker becomes visible when the date field is focused. The date picker can be scrolled using the scroll wheel on the mouse, and clicking the month name will enter a condensed view to speed up scrolling. Click a month to exit the condensed view. If a date is entered using the keyboard, it must follow the defined format, e.g. DD-MMM-YYYY, YYYY/MM/DD, DDMMYY. Partial dates, where allowed, may only be entered via the keyboard.
Time	Enter the time using hours, minutes, and seconds as indicated in the field format.
Choice	Only one response option can be selected for each choice field. The field displays as radio buttons or a drop-down menu according to the study setup. To remove a response, use the Backspace or Delete key, click Reset below the field (eCRFs only), or select No Code (Reset) from the Missing Value dialog.
Check	A check field can be checked or unchecked. Multiple check fields may be included in one item; check all that apply.
Visual Analog Scale (VAS)	Select a point along the scale using the cursor or the left and right arrow keys on the keyboard. On eCRFs, the selected value is shown under the scale in the middle, with the first and last options in the scale shown on the left and right respectively. CRFs with backgrounds display the selected value directly under the scale indicator. To remove a response, use the Backspace or Delete key, click Reset below the field (eCRFs only), or select No Code Reset from the Missing Value dialog.

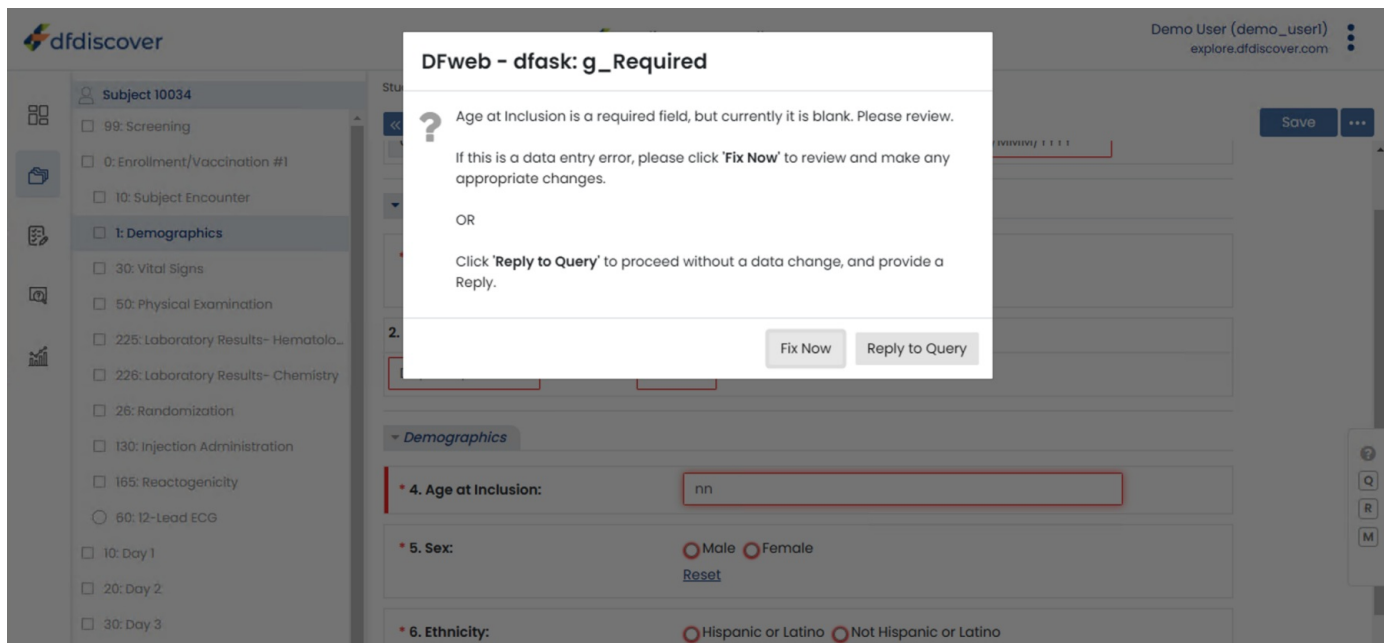
Missing Data Values

It can occur during data entry that the response to a question is not available. The question may not be relevant, the response is unknown or not applicable, or the response may only be available in the future. With the exception of data fields that are identified as essential, the response for any data field can be recorded as missing. While performing data entry it is important to mark the response for such a data field as missing, rather than leaving it blank. If left blank, a query will be raised during review - was the data field simply skipped or ignored, or was it considered and there is a reason why there is no response? To prevent this uncertainty, missing data must be appropriately identified. Conversely, if data was previously marked as missing and has since become available, the missing designation must be removed and the available data entered. For both situations, the steps are described in [Mark a Data Value as Missing](#).

Edit Checks

Edit checks are defined during study setup by the study coordinating center. They are fragments of logic that enforce study expectations for the data collected. They run interactively during data entry and data review. Edit checks may be run when you enter a CRF or a field, or when you leave a CRF or a field. Edit checks perform various actions, such as displaying messages, adding a query, masking a field, calculating data, or changing data to view only.

The following is an example edit check. Your own study will likely have similar edit checks to identify data issues. In the edit check example shown below, the edit check has detected that the date entered is a future date and displays a pop-up message to allow you to fix the issue now or reply to the query to explain the discrepancy.



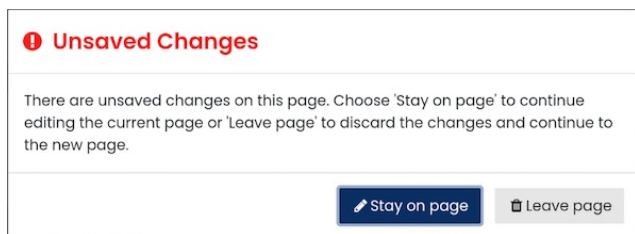
In DFweb, when you open a subject binder, all the data for that subject is loaded and cached for use by edit checks. This makes it faster for edit checks in DFweb to check data from other CRFs. The subject cache is updated each time you save any data changes and every 2 minutes in the background, to make sure that the data used by edit checks remains up to date.

Edit checks can be disabled using the Disable Edit Checks setting on the [Settings Page](#) or they may be disabled as part of a task.

Saving Data

When you have completed data entry on a CRF, you must save your changes before leaving the CRF. To do so, click **Save**, located near the right side of the header area.

If you leave the CRF before saving, the following dialog is presented:



The dialog may have a different appearance in the Safari browser.

Select **Stay on page** to remain on the CRF and save your changes. Select **Leave Page** to discard the data on the CRF. Your changes are not saved and cannot be retrieved.

Working Modes and Workflow Levels

Modes and levels in **DFweb** are set by edit checks or tasks, and always respect the user's permissions. The current mode and save level can be found by hovering the mouse over the save button. See [DFExplore User Guide, Changing Mode and Level](#) for more details on modes and levels.

Electronic Signature

If the CRF you have saved requires an electronic signature, after clicking **Save**, a dialog will appear indicating that the page is eligible for signing.

This page is eligible for signing

By entering your username and password, you are executing your electronic signature, which is the legally binding equivalent of your handwritten signature. Your electronic signature on this form indicates that you confirm that the information provided is accurate and true, according to site operating procedures and Good Clinical Practice (GCP) guidelines.

Enter password:

Username

Password

Provide your username and password and click **Sign** to execute your electronic signature and save the CRF. If you logged in using a Microsoft login, click Login with Microsoft instead and complete the Microsoft login. The eSignature fields on the CRF (signature, date, time, reason) will be autofilled on the CRF once signed. The eSignature fields cannot be manually entered or changed during data entry.

You have a limited number of tries to enter the correct username and password. If you provide an incorrect password more than the number of tries indicated, the CRF changes will not be saved and you will be automatically logged out of **DFweb**.

If you do not want to sign the record, click **Do not Sign** to save the CRF without providing your signature. Click **Cancel** to return to the CRF without saving your changes.

Once you have signed one CRF, you will only need to provide your password when you sign additional CRFs during that login session.

If data on a signed CRF changes after it was signed, it will need to be signed again.

Missed CRF Pages

NOTE: Missed CRFs are only supported when connected to DFdiscover server and API version 5.7 or later.

A missed CRF is a page that will not be completed, for example if an expected procedure was not performed at a visit or a form is not applicable for specific subject. CRFs may be set as missed if your user permissions allow it. To set a CRF as missed, open the blank CRF, click **☰** to open the CRF menu and select **Set Page Missed**.

Set Missed Page
Subject 10003 / Visit 99 / Plate 5

* Reason

Details

Choose a reason category and enter details describing the circumstances. Click **Apply** to set the CRF as missed or **Cancel** to return to the empty CRF. After clicking **Apply**, the CRF status is missed and no data can be entered on the CRF.

To see the reason why a CRF is missed, click **☰** to open the CRF menu and select **View Page History**.

If a missed CRF needs to be completed or was set missed in error, open the missed CRF, click **☰** to open the CRF menu, and select **Unset Page Missed**.

Unset Missed Page
Subject 10003 / Visit 99 / Plate 5

* Reason

Provide a reason to explain why the page is no longer missed. Click **Apply** to remove the missed status or **Cancel** to return to the missed CRF. After clicking **Apply**, the CRF is blank and data may be entered.

Viewing Page History

You can view the history of changes made to a CRF (audit trail) using the Page History option. On any saved CRF, click **☰** to open the CRF menu and select **View Page History** to view the history of changes for the current CRF page.

Page History	
Field: Visit Date	
2020-04-28 14:23:58	lisa entered data "08/MAR/2020"
Field: Were vital signs collected?	
2020-04-28 14:23:58	lisa entered data "Yes"
Field: Weight	
2020-04-28 14:23:58	lisa entered data "165.5"
Field: Weight Unit	
2021-07-27 07:27:20	lisa modified data to ""Missing Value"
	lisa created reason "Other, please specify: Although this weight is likely in pounds, it cannot be confirmed."
2020-04-28 14:23:58	lisa entered data "lb"
Field: Height Not Done	
2020-04-28 14:23:58	lisa entered data "Not Done"
Field: Oral Temperature	
2021-07-27 07:27:20	lisa modified data to "37.5"
	lisa created reason "Data entry error, now corrected."
2020-04-28 14:23:58	lisa entered data "37.2"
Field: Pulse Rate	
2020-04-28 14:23:58	lisa entered data "055.0"
Field: Blood Pressure Not Done	
2020-04-28 14:23:58	lisa entered data "Not Done"
Field: Systolic blood pressure	
2021-07-27 07:24:55	lisa created "Monitor" query with Detail "Please upload source notes to confirm systolic blood pressure." This "Monitor" has "Entered"
Times shown in UTC-04:00	

The Page History dialog displays a table with a list changes to the data and metadata for each field on the CRF page. The details include the username of the person making the changes and the date and time of the change. All changes to a field are grouped together under the field description header. If a field is currently selected on the CRF, that field will be outlined in blue in the Page History dialog.

The timestamp for each change is shown in the server's time zone, which may be different from your local time zone. The server's time zone is indicated by the UTC offset displayed at the bottom of the dialog.

Click **IF** to sort the changes from newest to oldest or oldest to newest within each field. Click **OK** to close the dialog and return to the data entry screen.

Page History is only available when **DFweb** is connected to DFdiscover server and API version 5.5 or later.

Reset Page

Select **Reset Page** from the CRF menu to undo all unsaved changes and reset the CRF to the last saved database values. This can be useful if you are interrupted during data entry and lose track of where changes have been made. After confirmation, unsaved changes to data, queries and reasons are discarded.

Metadata

Locating Metadata

Access queries, reasons, and missing values via the **Q**, **R**, and **M** buttons in the metadata icon panel on the right side of the window. The buttons indicate whether metadata is present on the current field. Click the appropriate button to add or change metadata. A blue, orange, or green border on a field indicates that the field has metadata and identifies its status as follows:

- **Blue** = outstanding query or rejected reason
- **Orange** = pending query or reason
- **Green** = resolved query, approved reason, or missing value code

Queries

Queries are used to request corrections or clarifications about the data. There are four query dialogs: Add Query, Edit Query, Reply to Query, and Delete Query. Query actions are controlled by role permissions or may be performed by edit checks. The following sections explain in detail how to use these dialogs if you have the appropriate permission. New queries or changes to queries are saved to the database when the CRF is saved.

For studies where multiple queries per field are enabled, there is an additional dialog where users can add a new query or choose an existing query to view, reply to, edit, or delete. Further details are provided in **Multiple Queries Dialog** below.

Add Query	To add a query to a field, click Q . If there is no query on a field, the Add Query dialog opens. Select an appropriate category from the dropdown menu, and provide the query detail in the provided text field. Based on your role permissions, you may only be able to select certain query categories. Once complete, click Apply to add a query to the field.
Edit Query	To edit a query, click Q . If the query is resolved, the Edit Query dialog opens. Otherwise, the Reply to Query dialog opens. Click Edit , and the Edit Query dialog opens. Select an appropriate category and status from the dropdown menu, and provide the query detail in the provided text field. Based on your role permissions, you may only be able to edit queries of certain categories. Once complete, click Apply to finish editing the query.
Reply to Query	If a query is already resolved, it cannot be replied to. Otherwise, to reply to an outstanding query on a field, click Q . The Reply to Query dialog opens, displaying the query detail. Enter the query reply content in the provided text field. Once complete, click Apply .

<p>Delete Query</p>	<p>Queries are rarely deleted. Once a query is created, it should be resolved, perhaps as irrelevant.</p> <p>If it is necessary to delete an existing query, click Q. If the query is outstanding or pending, the Reply to Query dialog opens. Click Edit, and the Edit Query dialog opens. Click Delete, the Delete Query dialog opens. In the Delete Query dialog, click Delete to finish deleting the query on the field. At each step please ensure that the query really should be deleted.</p>
<p>Resolving Queries</p>	<p>Typically, queries may be resolved by correcting the data value and providing a reason for data change or by replying to the query, which changes the query status to Pending or Resolved. The study coordinating center reviews any pending queries and resolves them. Follow instructions from the study team on how to resolve queries in your study.</p> <p>The status of a query can be changed to resolved via Q. Click Q, and then click Edit for the query that is to be resolved. Select the Resolved option from the Status dropdown menu, then click Apply to resolve the query.</p>
<p>Multiple Queries Dialog</p>	<p>In a study with multiple queries per field enabled, click Q for a field with an existing query to see the following multiple queries dialog:</p> <div data-bbox="435 516 1058 953" data-label="Image"> </div> <p>Each query in the dialog is identified by its category. Click the category to view key query information (reported value, detail, and reply, if provided). Click See details to see complete query information.</p> <p>The icons used in the multiple queries dialog are:</p> <ul style="list-style-type: none"> • Reply • Edit • Delete • Add <p>Additionally, there is another difference between single and multiple query-enabled study query dialogs. In single query-enabled studies there are navigation buttons at the bottom of the dialogs to get from one dialog to another. These aren't present on multiple query-enabled study query dialogs. Instead, the multiple query-enabled study query dialogs have a back arrow at the left top corner. The back arrow returns you to the Multiple Queries dialog.</p>

Add a Data Reason

Reasons are a way to provide additional information about existing data or to explain why data is changed. For each data field, the user can add a new reason or edit an existing reason using the Reason for Data Value dialog.

To add a reason to a field, click **R**. The Reason for Data Value dialog opens. Select an appropriate status from the dropdown menu and enter reason detail in the provided text field. Click **Apply** to add the reason to the field.

In some cases, the Reason for Data Value dialog may open automatically when a data value is changed. In these cases, a reason is required before the data change is accepted. If the data change was made in error, click **Revert to Old** in the Add Reason dialog to discard the data change.

To edit an existing reason, click **[R]** to open the Reason for Data Value dialog. This will replace the existing reason. Provide the reason, update the status if needed, and click **[Apply]** to finish editing and close the dialog.

To delete an existing reason, click **[R]** to open the Reason for Data Value dialog. Click **[Delete]** and then click **[Confirm Delete]** to confirm that the reason should be deleted.

Mark a Data Value as Missing

Missing value codes provide a way to mark a data value as missing. Users may select a missing value for any data field that is not essential to indicate that the data value will not be entered.

To mark a data value as missing, click **[M]**. The Missing Value dialog opens. Select an appropriate missing value from the dropdown menu, and click **[Apply]** to finish.

After marking a data value as missing, the field value is set to the missing value code and the field is disabled. Disabled fields can still be tabbed to, however editing the field is not possible.

To enter data in a field that has been marked as missing, select the field and click **[M]**. In the Missing Value dialog, select the **No Code (Reset)** option from the dropdown menu, and click **[Apply]** to finish. This enables the field for data entry and resets the field value to blank. **No Code (Reset)** can also be used at any time to clear a data value currently on that field.

Managing Documents

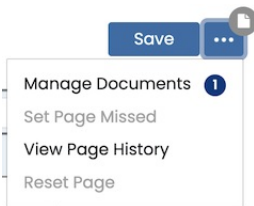
DFweb allows users to attach documents to a plate, which accommodates adding more data and information in other formats.

Supported Document Types

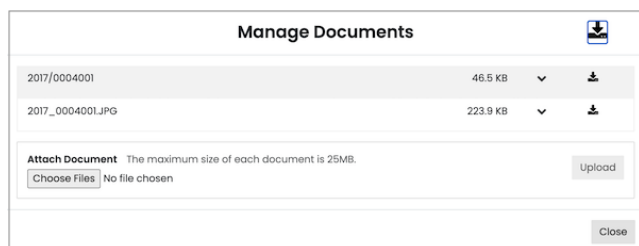
DFweb allows user to upload, view and download PDFs, images, audio, and video. Specifically for images, **DFweb** supports JPG, JPEG, PNG, BMP, DICOM, DIC, and DCM format; for audio, **DFweb** supports MP3, and WAV format; for video, **DFweb** supports MP4, and AVI format. The file size limit is 25 MB.

Reviewing Documents

Navigate to the **Manage Documents** dialog to review documents. This is available via the Manage Documents menu item under the CRF Menu **[...]** (without documents) or **[...]** (with documents), in the top right corner of the plate. Click **[...]** to choose from the dropdown menu items:



The number next to **Manage Documents** indicates the number of existing documents for this plate. Click **Manage Documents** to open the **ManageDocuments** dialog. Below is an example of the **Manage Documents** dialog.



In the **Manage Documents** dialog, users can review documents. To review a document, click **[v]** to expand the collapsible content:

Manage Documents 

2017/0004001 46.5 KB  



2017_0004001.JPG 223.9 KB  

Attach Document The maximum size of each document is 25MB.

No file chosen

Click  to collapse the content.

Many document types can be previewed or played without downloading first, including PDF, JPG, JPEG, PNG, BMP, MP3, WAV, and MP4 format. For DICOM, DIC, DCM, AVI or other formats, they must be downloaded first.

Adding Documents



Navigate to the **Manage Documents** dialog by following the instructions in [Reviewing Documents](#).

Click to open the file browser and select one or more files from your computer. Once complete, click to add the file(s).

Security compliance is enforced when uploading PDFs to provide protection against cross-site scripting (XSS attacks). If a PDF with potentially unsafe content is uploaded, DFweb will display a warning message indicating that the file cannot be displayed to meet system security requirements. The file is still uploaded to the DFdiscover server but will not be displayed in DFweb.


Downloading Documents

Navigate to **Manage Documents** dialog by following the instructions in [Reviewing Documents](#).

Click  to the right of the file name to download that particular file. Click the large  at the top of the dialog next to the Manage Documents title to download in a zip file all the documents listed.

Sharing Links

The ability to share links minimizes the time and effort to navigate to a particular page.

Click the Application Menu, , and then select **Copy URL** from the dropdown menu. The copied URL can be re-visited at a future time, or shared with others.


When using a copied URL, the user is redirected to the login page first, where they are required to login. After successful login, the user is taken to the linked page.

Queries View

Opening Queries View

Queries View allows you to review data queries, with filter options such as query status (outstanding, pending, resolved), query category (such as missing, illegal, overdue visit), and query timing.

Note: Query View is only available when DFweb is connected to DFdiscover server and API version 5.5 or later.

Once you have selected a study, the list of data queries is available by clicking  **Queries** in the sidebar on the left of the screen.

- Dashboard
- Subjects
- Tasks
- Queries**
- Reports

Queries Showing 11 of 13

Site 901 - Seattle Grace Hosp Any Category Outstanding

Location	Query Header	Query Details	Age	Timing
901-ABC-002 Screening Demographics	Race Other = Unchecked (Missing) Outstanding	Detail: For items Race American Indian or Alaska Native through Race Other, at least one response must be given, but currently all are blank. Please review.	12 days	Modified: angela Apr 18, 2024 Created: angela Apr 18, 2024
901-ABC-004 Enrollment Serum Pregnancy Test	Serum Collection Date: = (Missing) Outstanding	Detail: Please review. Because Was a Serum Pregnancy Test Performed? is marked 'Yes', Serum Collection Date: is a required field, but currently it is blank.	11 days	Modified: angela Apr 19, 2024 Created: angela Apr 19, 2024
901-ABC-004 Enrollment Serum Pregnancy Test	Serum pregnancy test results: = blank (Missing) Outstanding	Detail: Please review. Because Was a Serum Pregnancy Test Performed? is marked 'Yes', Serum pregnancy test results: is a required field, but currently it is blank.	11 days	Modified: angela Apr 19, 2024 Created: angela Apr 19, 2024
901-ABC-007 Enrollment Physical Exam Screening	Time of Physical Exam: (24-hr clock) = (Missing) Outstanding	Detail: Please review. Because Was the physical exam performed? is marked 'Yes', Time of Physical Exam:	167 days	Modified: laura Nov 15, 2023 Created: laura Nov 15, 2023

By default, the outstanding queries from the first site in the site list are shown. If you open a site before clicking queries in the sidebar, the queries for that site will be shown by default. Both the site and status can be changed using the filters.

With the query list open, a table of queries with 5 columns is shown. The columns of the table are:

Location	Shows the subject ID, visit label and label of the CRF the query is on. Also shows the status of the query as an icon.
Query Header	Shows the field name, field value, category, and status of the query in the format of "Field name = Field value (Category)" with the status on the next line.
Query Details	Shows the query details, any reply that was given to the query, and any notes added to the query.
Age	Shows the number of days from query creation to today, or to query resolution if resolved.
Timing	Shows when the query was created and last modified, and by whom it was created and last modified. Hover over the date to see the timestamp. Timestamps include the UTC offset and are displayed in the server's time zone, which may be different from your local time zone.

Filtering the Query List

In addition to the queries list, the Queries page also includes options to filter queries by site, subject, status, category, and timing. The number of queries matching the filter and the total queries in the site is shown next to the filters.

The site, status and category filters are can be changed quickly using the dropdowns on the query list page. Selecting a value from these will update the table to show only the queries that match the new filter. The status and category filters also have an Any option, which removes the filter and shows queries with any of those options. Click to open filter dialog for more filtering options.

Query Filter Dialog

Query Filters Site 10 - New York Subject Id

Status
 Outstanding Pending Resolved

Category
 Monitor Safety Missing Illegal
 Inconsistent Illegible Fax Noise Missing Page
 Overdue Visit EC Missing Page Clinical Coding Other

Timing
 Show queries modified to days ago
 Show queries created to days ago

Showing 1 of 298 OK

The query filter dialog provides access to the same filters as in the query list page, plus filters for timing and subject ID. In the dialog, it is possible to select more than one status or category so queries with any of the selected options show. Updates to the site, subject, status, and category filters in the filter dialog also update the dropdowns on the query list page. If more than one option is selected for status or query, then the corresponding dropdown on the query list page will display **Multiple Statuses** or **Multiple Categories**.

The timing options allow you to filter by queries modified or created before or after a certain number of days ago. Adding a value to one of the timing fields will clear the other.

Once you have the desired filters applied, click **OK** to return to the query list page.

Sorting the Query List

The query list is sorted based on the subject ID, visit number and CRF number in ascending order by default. This can be reversed to show the highest subject ID, visit and CRF first by clicking the Location column header. In addition, it is possible to sort the queries based on their age by clicking the Age header or by when they were last modified by clicking the Timing header. Clicking again reverses the direction of the age and timing sort as well.

Downloading the Query List

You can download the query list to share or review outside DFweb. Click **↓** to select XLSX or CSV format. Only the queries in the current list are downloaded, taking the applied filters as well as sorting into account. You may be prompted to give DFweb permissions to download files to your device.

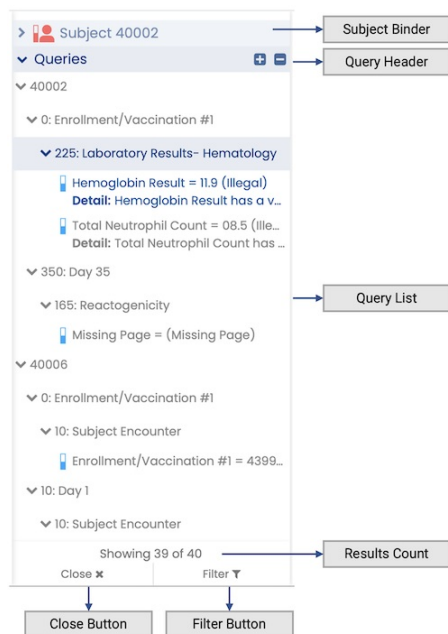
Reviewing a Query

To open the CRF that contains a query, double-click anywhere on the query row.

Reviewing Queries

To review a query, double-click any query to open the CRF and go to the field where the query is located. Click **Q** to open the query dialog.

The query binder is opened in the sidebar with the current subject, visit, CRF and query showing. All filters applied to the query list in the query list page are also applied to the query binder. You can review, filter and navigate through the query list using the query binder.



Subject Binder	View all CRFs in the current subject binder by clicking the subject binder header. Clicking again collapses the subject binder and reopens the query binder.
Query Header	Click the query binder header to collapse or expand the query binder. Click + to expand all subjects, visits, and CRFs so all queries are shown in the list. Click - to collapse them all so all queries are hidden.
Query List	The query list shows the status icon, field name, field value, category, detail and reply of all queries. Click a subject, visit or CRF to expand or collapse it. Click a query to navigate to that CRF and field. Hovering over a query in the query list shows more details about the query.
Results Count	Shows the number of queries that match the filter criteria, and the total queries in the currently selected site.
Close Button	Closes the query binder while staying on the current CRF.
Filter Button	Opens the Query Filter Dialog .

The query binder stays up to date with the data that has been saved. If you make a change to a query, you must save it for the changes to appear in the query binder.

Reviewing Other CRFs

You can expand the subject binder to view all other CRFs in the subject binder for the current subject. You can open CRFs from the subject that don't have queries in the query binder to review their contents and assist you in reviewing a query. Expand the query binder and click the query you were working on to return to the query.

Filtering the Query Binder

Click **Filter** in the sidebar to open the filter dialog. The filter dialog behaves the same as when opened from the query list, but it updates the query binder instead. See [Query Filter Dialog](#) for more details.

Closing the Query Binder

Click **Close** to end the task you are working on. You will stay on the current CRF, but the query binder will be closed.

Tasks

Task Listing

Tasks is a feature that allows you to retrieve a set of CRFs to review. Each task has its own purpose, defined by the study sponsor or coordinating center, and may include instructions.

Warning: Tasks are only available when **DFweb** is connected to **DFdiscover** server and API version 5.5 or later.

Once you have selected a study, the list of tasks will be available by clicking **Tasks** in the sidebar on the left of the screen.

The screenshot displays the 'Tasks' page in the DFdiscover application. The top navigation bar includes the 'dfdiscover' logo, 'DFdiscover Sandbox', and 'Demo Account (demo)'. The left sidebar contains navigation options: Dashboard, Subjects, Tasks (highlighted), Queries, and Reports. The main content area shows a list of tasks. The first task, 'Ongoing Adverse Events', is expanded. Its header includes a 'Task Record Count' of 4 and a 'Start Button'. The expanded view shows 'Task Instructions' with the text: 'Please review and ensure AE data is updated as required. Includes AEs for randomized subjects only.' Below the instructions, it states '4 records match the search criteria'. Other tasks in the list include 'Abnormal AST and ALT', 'CV plates with open queries - Critical variable plates with outstanding queries', 'MedDRA Coding needed', 'Outstanding queries at Screening - Screening visit queries to be resolved', 'Pending Queries', 'Randomization eCRFs', 'SDV_task - Ready for SDV by monitor', and 'SearchTaskByProgram'.

On the task list page, the headers of all the tasks available to your role are shown, and the first task is expanded to show more details.

The task header shows:

- **Task CRF Count** Indicates the number of CRFs currently in this task.
- **Task Name and Description** The name of the task is shown in the header, followed by a dash and then the description of the task, if it has one.
- **Start Button** For the currently expanded task, **Start** is shown in the task header.

Clicking the header of a task expands the task and closes any previously expanded task. Once expanded, the task details show:

- **Task Instructions** Instructions provided for the task, if any.
- **Task CRF Count** The number of CRFs currently in the task.

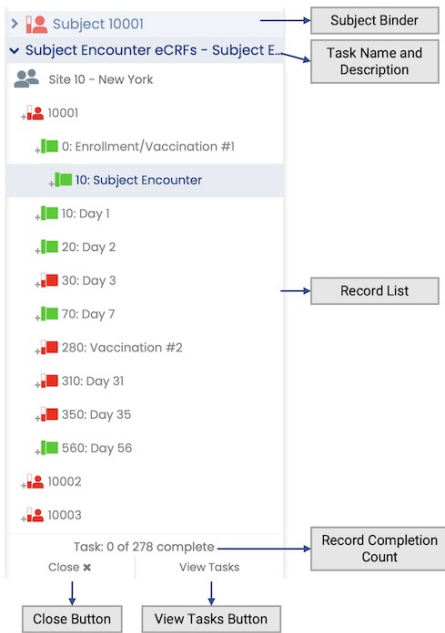
If a task has a CRF count of zero, the Task Name and Description and Task CRF Count are de-emphasized, and **Start** is disabled. You cannot start a task with no CRFs.

Starting a task

To start a task, expand the task you wish to work on, then click **Start**. This will open the CRF view and take you to the first CRF in the task.

Task Results

Starting a task takes you to the data entry form with the task binder open in the left-hand sidebar. The first CRF according to site, subject, visit and CRF number is opened, and the other CRFs in the task are available in the task binder sidebar.



The task binder sidebar shows:

Subject Binder	View all CRFs in the current subject binder by clicking the subject binder header. Clicking again collapses the subject binder and reopens the task binder.
Task Name and Description	The name of the task is shown in the task binder header, followed by a dash and then the description of the task, if it has one. Click the task binder header to collapse or expand the task binder.
CRF List	All CRFs in the task are shown in this CRF list. The CRFs are organized by site, subject, and visit.
CRF Completion Count	The CRF completion count shows the completed and total number of CRFs in the task.
Close Button	Click Close to stop working on the task while keeping the CRF open.
View Tasks Button	Open a dialog showing the current task details, and a list of other available tasks.

Following the instructions for the task, complete the necessary changes on the CRF. Saving the CRF updates the CRF completion count and marks the CRF with a checkmark in the sidebar to show that it was completed. Click on the next CRF, visit, subject or site move to the next CRF in the task.

NOTE: Tasks may run with edit checks enabled or disabled. When set to run with edit checks enabled, the edit checks may still be disabled due to the Disable Edit Checks setting on the [Settings Page](#). Ensure the Disable Edit Checks setting is off while running tasks.

Reviewing Other CRFs

You can expand the subject binder to view all other CRFs in the subject binder of the current subject. You can open CRFs from the subject that aren't in the task to review their contents and assist you in completing the task. Expand the task binder and click the task CRF you were working on to return to the task.

Switching Tasks

Click **View Tasks** to open a dialog with the list of tasks available. The current task is expanded by default. Select the task you wish to switch to, and click **Change Task** to change tasks. The first CRF in the selected task will be opened. The state of the current task is not preserved when you switch, so the completed CRFs will be reset if you switch back to the first task.

Closing a Task

Click **Close** to end the task you are working on. You will stay on the current CRF, but the task binder will be closed. Returning to the site, subject, or study list pages also ends the task. You can restart the task you were on from the task list page.

Reports

Reports Listing

Reports support the suite of DFdiscover reports as well as Tabular and Task listings. Legacy and Study Reports are displayed only in **DFexplore**.

Reports allow you to view study data and other information in charts, graphs, and tabular listings. The reports available to you are based on your study access details and are determined by the study sponsor or coordinating center.

Warning: Reports are only available when **DFweb** is connected to **DFdiscover** server and API version 5.5 or later.

Once you have selected a study, view the list of reports available by clicking **Reports** in the sidebar on the left of the screen.

The Reports page provides a list of all reports as well as an option to change how the list of reports is displayed (alphabetically or within groups) and a search option.

By default, reports are listed in alphabetical order. Enable the **Grouped View** option () to view the reports within defined groups. With Grouped View enabled, all groups are expanded to show the list of reports available within that group. Click the group name or anywhere in that row to collapse that group of reports. To return to the alphabetical list of reports, disable the **Grouped View** option ().

Use the Search field to filter the list of reports just to those that match your search term.

Click the report name or anywhere in that row to open the report in a dialog.

Report Descriptions

The reports you see in **DFweb** depend on your study permissions. This section provides a description of some of the available standard **DFdiscover** reports, however these reports may not all be available to all users, and there are additional reports available not listed here. Complete details on standard **DFdiscover** reports are available in [Reports User Guide](#), [Alphabetical Listing](#), [DFdiscover Reports](#).

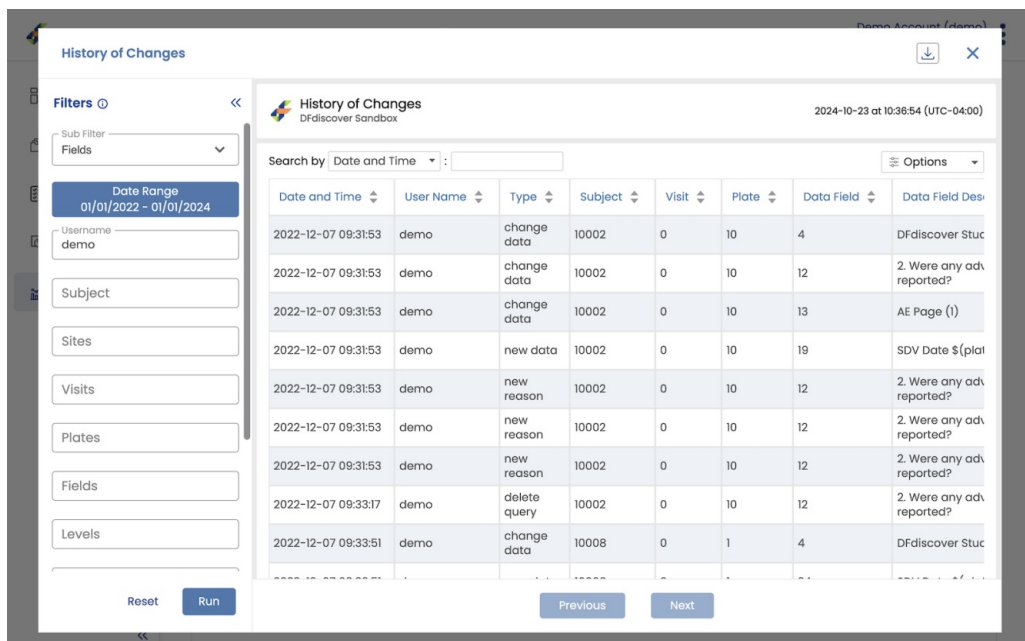
<p>CRFs by Site</p>	<p>This report shows workflow statistics for time to receive data, enter data, and save data as final. Statistics are grouped by site, or optionally by country. Click on any bar to see the detail view for the site or country. An optional view, Time to Final, is available that presents the percentage of records that have final status on arrival (did not require further editing or clarification) and the percentage of records that have final status now.</p>
<p>Data Entry Time Trend</p>	<p>This report displays the number of data records entered via EDC and from paper CRFs (if applicable), and the number of elapsed days to complete data entry for each record. The numbers are graphed on two axes: Number of Records and Days Elapsed. For time to complete data entry, the number of days between visit date and record creation date (delay) is calculated. If a record does not have a visit date, it is counted in the number of data records but it is not included in the number of days elapsed. Click on any bar to switch to the detail view for the selected site, showing the number of percentage of EDC and paper records and the average elapsed days per month over time. To view the change in data entry over time, check Enable Timeline Animation in the Options drawer. The report window updates to include animation controls and a timeline marked with the earliest date and the most recent date for which data is available. Use the controls to play, pause, and step forward/backward through the data.</p>
<p>Enrollment by Site</p>	<p>This report displays enrollment numbers on a per site, or per country, basis. The default summary view displays current enrollment for all sites you have access to, including the target enrollment if defined. Click on any bar to see the detail view with aggregated monthly enrollment numbers over time for the selected site or country. In detail view, monthly enrollment data includes the enrollment in that month (bar) and the cumulative enrollment up to and including that month (stepped line). Sloping rate lines are also included: constant rate (which assumes that total enrollment is achieved over the interval between site start and end dates) and trend line (linear interpolation of available monthly data). Vertical markers are included for Target Date (where the constant rate line meets total enrollment), Projected Date (where the trend line meets total enrollment), and optionally Actual Date (where total enrollment was achieved). By default, subjects are considered enrolled if the baseline visit date is entered in the database. This default can be changed via report filters.</p>

<p>History of Changes</p>	<p>DFdiscover maintains a change history of every data value or metadata value that is added/modified/deleted during the course of the study. This report outputs the change history in tabular format and by default displays the first 100,000 history records (3,000 records per page) for data, queries, and reasons. Filter options are provided to limit the output. The output includes:</p> <ul style="list-style-type: none"> • identification of when the change the was made (Date and Time), by whom (User Name) and the type of change (Type). • identification of the value that was changed, including the data keys (Subject, Visit, Plate), the data field that was changed (Data Field and Data Field Description). • the actual change (What Changed, Old Value, New Value, Old Code Label, New Code Label) • and the related metadata (Query Usage/Reason Text, Query Category/Reason Code, Status, Level) <p>Additional sub-filters are provided for different types of output:</p> <ul style="list-style-type: none"> • List Keys lists database record keys with creation, modification and users who created or modified the records. Creation and modification timestamps may differ from the record DFcreate and DFmodify fields as they can be imported by DFimport.rpc to keep record's DFcreate and DFmodify values. • Keys Change lists all keys changing history by searching reason pattern 'Keys changed from [id,visit,plate] to [new_id,new_visit,new_plate]' • Image history lists the history of a specific image or a fax containing all pages
<p>Queries by Field</p>	<p>This report shows the number of queries, of each category, for each field in the database. The output includes each data field that has at least one query. By default, output is sorted by increasing plate number, and field number within plate. Fields which have no queries are not presented. Choosing Sort by Total produces output ordered by the most frequently queried data fields. Note that missing page and overdue visit queries are always attributed to the subject ID field on a plate.</p>
<p>Queries by Site</p>	<p>This report provides summary information about queries in the database. Summary information is reported by site (default) or country and presented in chart and table form. It includes 4 different views: Queries by Status (including resolved and pending queries), Categorical Age of New/Unsent Queries (including outstanding queries not sent to sites in a Query Report), Categorical Age of Sent/Unresolved Queries (including outstanding queries sent to sites in a Query Report), and Percent Resolved Queries.</p>
<p>Query Overview</p>	<p>This report provides an overview of the status of queries in the database. The first section shows the total number of queries and the percentage of resolved, outstanding, and pending queries. The second section shows the percentage of outstanding queries that are data queries (queries on specific data fields), missing page queries, or overdue visit queries.</p> <p>Click any section of the pie chart or any legend marker (except resolved queries) to open a table listing of pending or outstanding queries shown in that section of the pie chart.</p>
<p>Query Report</p>	<p>This report provides an overview of the study schedule status and number of queries for each subject, followed by detailed listings of queries, including those that are outstanding, resolved, and pending. Correction queries and clarification queries are included in separate listings.</p>
<p>Query Status Trend</p>	<p>This report shows the current, total number of resolved and outstanding queries per site. To view the percentage of resolved and outstanding queries per site, select the <u>Relative</u> option under Measure in the Options drawer. Click on any bar to switch to the detail view for the selected site, showing the number or percentage of resolved and outstanding queries over time, sampled on a monthly interval based on when the query was created. To view the change in query status over time, check Enable Timeline Animation in the Options drawer. The report window updates to include animation controls and a timeline marked with the earliest date and the most recent date for which data is available. Use the controls to play, pause, and step forward/backward through the data.</p>
<p>Query Time Trend</p>	<p>This report shows the number of resolved and outstanding queries and the days it takes to resolve queries. The numbers are graphed on two axes: Number of Queries and Days Elapsed. To view the percentage of resolved and outstanding queries, select the <u>Relative</u> option under Measure in the Options drawer. For time to resolve queries, the number of days between query creation and query resolution dates is calculated. For outstanding queries, the report uses today as the resolution date to make the calculation. Click on any bar to switch to the detail view for the selected site, showing the number or percentage of resolved and outstanding queries and the average elapsed days over time, sampled on a monthly interval based on when the query was created. To view the change in query resolution over time, check Enable Timeline Animation in the Options drawer. The report window updates to include animation controls and a timeline marked with the earliest date and the most recent date for which data is available. Use the controls to play, pause, and step forward/backward through the data.</p>



<p>Query and Data Entry Metrics</p>	<p>This report provides metrics for queries and data entry, providing a high-level view of data quality. The metrics shown in this report include:</p> <ul style="list-style-type: none"> • Number of outstanding queries older than 30 days, based on creation date • Number of new queries added in the last 7 days • Mean queries per 100 pages (query rate) • Mean days to resolve queries • Percentage of pages final on entry (no queries, missing required values, or illegal/ invalid values when the CRF was first created) • Percentage of pages final now • Mean days to data entry (days from visit date to CRF creation) • Mean days to final (days from visit date to CRF first saved as final) <p>By default, the metrics in this report reflect all data the user has access to. Filters can be applied to limit the data to a specific site or subject. In the Options panel, specific metrics can be hidden from the report.</p>
<p>Status and Level Summary</p>	<p>This report provides a summary of the workflow levels and status of data records, queries, and reasons in the database. Click on any bar to switch to the detail view of record, query, and reason statuses for that workflow level.</p>
<p>Subject Schedule of Visits</p>	<p>This report provides a summary view of the subject schedule and provides a detail view of the study schedule for each subject. The summary view includes the entry (baseline) visit date, most recent visit date, next expected visit, and days overdue (if the next visit is overdue) or number of outstanding queries. Click any row in the table to view the detail view, which shows all possible study visits and the schedule date (calculated based on visits completed to date), complete date (actual visit dates), days off-schedule or days overdue (if applicable), and the status of the visit.</p>
<p>Subject Summary</p>	<p>This report provides a listing of study subjects with their latest visit date, next expected visit date, number of days the next visit is overdue, and the number of queries outstanding.</p> <p>Click the schedule icon or number in the Days Overdue column to view the detailed scheduling information for that particular subject, the same information as shown in the Subject Schedule of Visits report. Click the queries icon or number in the Outstanding Queries column to view the list of outstanding queries for that particular subject.</p> <p>By default, the table displays active subjects only (follow-up not yet done or any outstanding queries). Use the Options panel to view complete subjects (follow-up done and no outstanding queries) or all subjects, or apply filters to limit the data to a specific site or subject.</p>
<p>Subject and CRF Status Overview</p>	<p>This report provides an overview of the status of subjects and CRF pages in the database. The first sections shows the total number of subjects and the percentage of complete and incomplete subjects, based on the status of each subject's CRFs, queries, and visit schedule. The second section shows the total number of CRF pages and the percentage of each CRF status (final, incomplete, pending, and missed).</p> <p>Click any section of the pie chart or any legend marker to open a table listing of subjects or CRF pages summarized in that section of the pie chart.</p>
<p>Task Summary</p>	<p>This report provides a table listing of all tasks available to you, including the name, title, workflow details (mode, level, run edit checks), count of pages currently in the task, and any instructions provided for the task.</p>
<p>Visits by Site</p>	<p>This report shows the number of visits, by visit number, that have occurred at each site. A visit is considered to have occurred if there is at least one page in the database with that visit number.</p>

Report Dialog

Clicking a report name in the reports listing opens that report in a dialog that overlays the main application page.






The report dialog includes:

Report title	The name of the report that is currently open is shown in the top left corner of the dialog.
Filters sidebar	If the report has filters available to customize the report results, the Filters panel will appear on the left side of the dialog. See Filters for more detail.
Report results	The main part of the dialog displays the report results. Each report includes the report title, study name, and logo (if available) in the left corner, and the date and time the report was run in the top right corner. The time is shown in the server's time zone, which may be different from your local time zone. The UTC offset is displayed when connecting to DFdiscover server version 5.9.0 and later. Some reports include interactive elements; see Interactivity for more detail.
Download button	Click  in the top right corner of the dialog to save for sharing and review outside of DFweb. See Report Download for more detail.
Close button	Click  in the top right corner of the dialog to close it and return to the reports listing.

Filters



Some reports have filter options to customize the report results. When a report is opened, the report is displayed using the default options, however the filters can be used to change what data is included in the report.

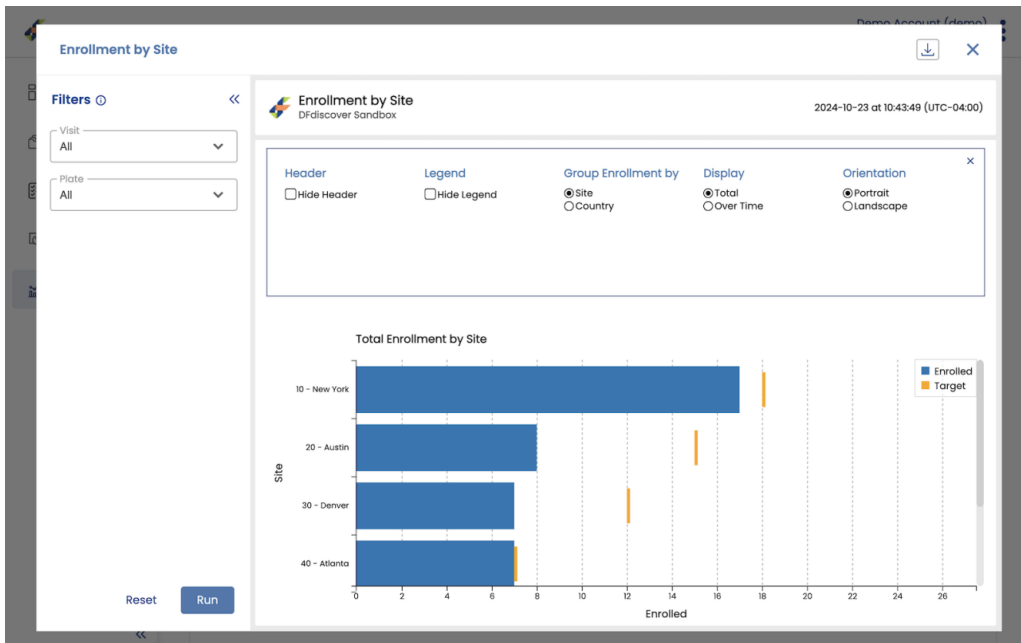
Click  in the Filters sidebar to view details about each of the available filters for this report. Select or enter filter options as needed, then click **Run** to view the updated report based on the updated filter options. Click **Reset** to restore the filter options to the default.

The Filters sidebar is collapsible, so you can move it out of the way if you don't need it. Click  to collapse and  to expand as needed.

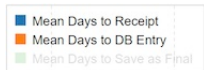
Interactivity

DFdiscover reports include built-in interactivity, where output can be manipulated and displayed in diverse ways without re-executing the report. Some reports provide sub-views with more detailed information about a component of the report. Most listings include the ability to navigate to a subject or page in CRF view within DFweb. These interactivity options are detailed below:

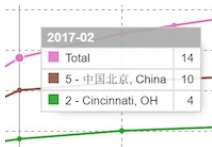
- **Options drawer:** The options drawer is opened by clicking on the options tab ( Options). Several appearance settings and behaviors can be changed in the options drawer. Each report has a common option to show/hide the header, plus its own unique settings. When the drawer is open, the report output is updated when a setting is changed. When no further changes are needed, click  to close the drawer.



- **Display/hide elements:** The visibility of elements in a graph can be toggled by clicking the corresponding element in the graph legend. Clicking an element once turns off visibility and clicking it again turns on visibility.



- **Display graph values:** By hovering the mouse pointer over a graph or chart element, it is possible to inspect the data value(s) in that element.



- **Report sub-views:** More info for a report is available by clicking a chart or graph element. The hand cursor appears when this option is available. In some cases, this action creates a sub-view of the current report, switching the displayed content. From the sub-view, you can return to the main report window by clicking the return arrow (←). Some sub-views allow you to navigate to the CRF indicated in the listing; see below for details.
- **Navigate to a CRF:** Some reports (including all tabular listings) or report sub-views allow you to click a row in the listing to open the page in the CRF view within DFweb. When the hand cursor appears when hovering over a report listing, clicking it will exit Reports view and open that subject, visit, or page in CRF view.

Selecting a subject where visit and plate are not specified will open the first page in the first visit for that subject, while selecting a subject visit where a plate is not specified will open the first page in that visit.

Note that the report is closed when you leave Reports view for CRF view, so using the browser's back button or navigating back to Reports view will return you to the list of all available reports.

This feature is not available in reports that have been downloaded from DFweb.

- **Search and sort:** For reports that include tabular listings, search the output by selecting the field of interest in the **Search by** dropdown list and then specifying the value to search for. Each column can be sorted in ascending or descending order by clicking the column heading. Each click reverses the previous sort order.

Report Download


Reports may be downloaded for sharing and review outside of DFweb. The currently report is saved with the selected filters applied, which cannot be changed in the downloaded report. The options drawer and other interactive elements remain available in the downloaded report, excluding links to the CRF view in DFweb.

To download the current report, click  in the top right corner of the dialog. Select one of the two available options:

- **HTML** - Requires internet connection to view. The report is saved in standard HTML format with external references to CSS and JS resources. Without an internet connection, the report appears as a blank window.
- **Archive** - No internet connection required to view. The report is saved in standard HTML format with all the CSS and JS resources contained within the file.

NOTE: Downloaded reports cannot be opened on iOS or iPadOS devices. Use the Share functionality to open the file on another device where HTML files are supported.


Closing a Report

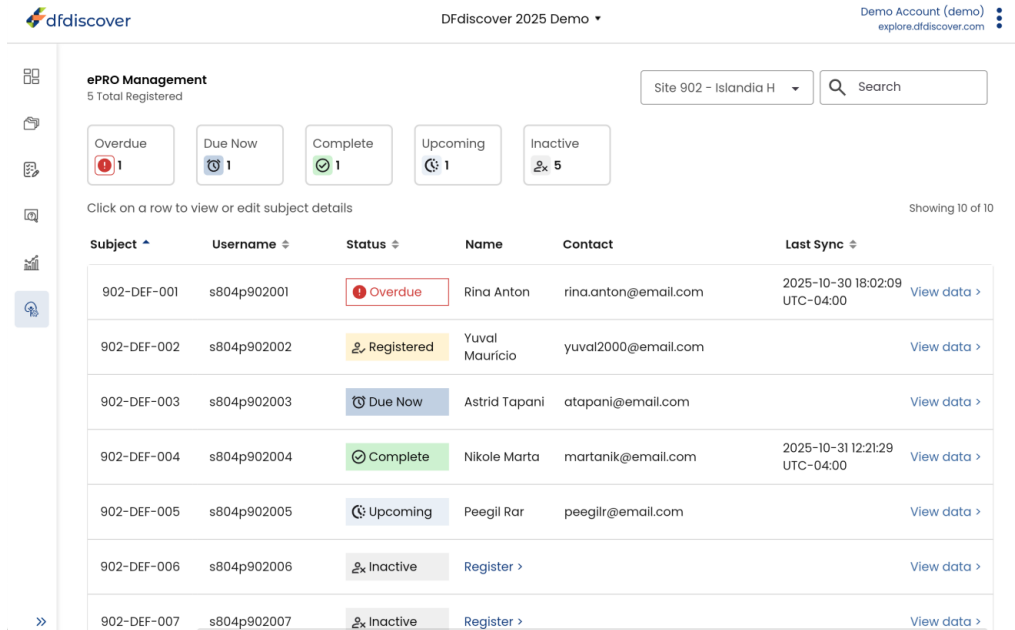
Click  in the top right corner of the report dialog to close the report and return to the reports listing.

Overview

The ePRO Management page provides authorized staff with tools to support participants using the **DFengage** ePRO app. This page provides the ability to:

- Register study participants for DFengage ePRO
- Send invitation emails or provide a QR code or link for easy DFengage setup and login
- Track the overall ePRO status for each participant
- Provide login support to participants
- View audit logs

The ePRO Management page is available by clicking  **ePRO** in the sidebar on the left of the screen.



ePRO Management
5 Total Registered

Site 902 - Islandia H Search

Overdue 1 Due Now 1 Complete 1 Upcoming 1 Inactive 5

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

Subject	Username	Status	Name	Contact	Last Sync
902-DEF-001	s804p902001	Overdue	Rina Anton	rina.anton@email.com	2025-10-30 18:02:09 UTC-04:00
902-DEF-002	s804p902002	Registered	Yuval 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 >		

Note: ePRO Management is only available to authorized users when DFweb is connected to DFdiscover server and API version 5.10 or later.

Access and Privacy

The primary users of the ePRO Management page are site staff working directly with study participants to support the setup and use of **DFengage**. Personally identifying information (PII), including name and email address, is securely collected through this tool in order to facilitate communication with study participants for study engagement and protocol adherence. Other users on the study team may also access the ePRO Management page for monitoring and oversight.

Access to the ePRO Management page is provided only to authorized users through user permissions assigned by the study coordinating team. There are three types of access available to the ePRO Management page:


- **ePRO Admin:** Typically site staff working directly with study participants. Includes full edit permissions with access to PII.
- **ePRO Monitor:** Typically study staff performing site monitoring. Includes view only permissions with access to PII.
- **ePRO Viewer:** Typically study staff providing oversight and support. Includes view only permissions with no access to PII.

PII collected in study participants' user profile (name, email, phone) is encrypted and only accessible to users with the ePRO Admin or ePRO Monitor roles.

ePRO Status

The status for each subject begins as **Inactive** before they are registered to use DFengage and proceeds through various statuses until their ePRO activities are fully **Complete** according to the study schedule. Each subject will have one of the following statuses:

Status	Description
Inactive	Account is created but subject is not registered yet, or their account has been made inactive after registration.
Registered	Subject has been registered, but they do not have any ePRO activities available yet.
Upcoming	No activities are currently due now or overdue, and new ePRO activities are scheduled for a future date.
Due Now	One or more ePRO activities are due for completion now, with no overdue activities.
Overdue	One or more ePRO activities are overdue for completion.
Complete	All scheduled ePRO activities have been completed, with no upcoming activities.

The dashboard at the top of the page summarizes the number of participants with each status (excluding Registered). Click any of the cards to filter the listing to see only the subjects with that status. Click the  on the card to remove the filter and see all subjects.

Subjects List

If you have ePRO management permissions to multiple sites, by default this page displays subjects from the first site. Use the dropdown at the top right to switch to another site. Use the **Search** field to find a specific subject in the list within the current site.

Subjects appear on this page once ePRO user accounts have been created by the coordinating team in **DFadmin**.

The following information is displayed for each subject in the list:

Subject	Subject ID, or subject alias if the 'Use subject alias' setting is enabled.
Username	The subject's username for accessing DFengage ePRO. It serves as their unique, anonymous identifier in the audit trail and ePRO logs. Participants need their username, or a login link that pre-fills their username, along with their password to log in to DFengage.
Status	The subject's current ePRO status, as described above.
Name	The subject's name. This information is not displayed for ePRO monitors or viewers.
Contact	The email address and, if defined, phone number for the subject. This information is not available for ePRO viewers.
Last Sync	The date and time when data was last received from the subject via DFengage.
View data	Link to the subject's binder in the CRF view, including any ePRO data submitted.

The subjects list is sorted based on the subject ID in ascending order by default. This can be reversed to show the highest subject ID. In addition, it is possible to sort the subjects based on username, status, or last sync by clicking the appropriate column header. Clicking again reverses the sort direction.

Subject Registration

Registration with an email address is required to send ePRO-related emails to study participants, including DFengage invitations, activity reminders, password reset requests, and two-factor authentication codes. A phone number is required if the study administrator has enabled two-factor authentication through SMS instead of email. The phone number must include both the country code and the area code, e.g. 1-555-1234567. Some aspects of registration may be customized for your study by the coordinating team, and may appear different from the screenshots shown in this section.

To register an inactive subject, click **Register** in the Name column. A dialog opens with the information to be completed to register the participant for ePRO.

ePRO Subject Registration - Subject 902-DEF-005

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

Name
Peegil Rar

Email
peegilr@email.com

English

UTC-05:00 America/Toronto (EST)

Confirm Subject Alias
902-DEF-005

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

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

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

Provide the information requested on the form. The information requested may include:

- Name, email, phone. Email is required to send the invitation. At least one of name, email, or phone is required to consider the subject registered.
- Language may be requested so that the invitation and reminder emails can be sent in the appropriate language, if defined. If language is not captured, the user's language is set to the study's default language.
- Time zone is used to correctly calculate the ePRO status to match what the participant sees in DFengage according to their local time zone. By default, your current time zone will be selected. If the participant's time zone is different, scroll through the dropdown or search to find the correct location.
- Confirm subject ID/alias to avoid registering a participant under the wrong identifier.
- If sending the invitation by email to the participant, double-check that the email address is correct. The subject will need to verify their email address before they can login to DFengage. Click **Preview invite** to see the email before it is sent. The invitation template is defined by the study coordinating team and cannot be modified before sending.
- Verify that the details provided are correct.
- Verify that the participant has consented and is eligible to participate.

Click **Register** to complete the registration process and receive confirmation that registration is complete and, if requested, the invitation was sent. Click **Cancel** to return to the subjects list without completing the registration process.

Subject Details

Once a subject is registered, click a row in the subjects list to open that subject's details in a dialog.

ePRO Subject Details [Edit](#)

Subject 902-DEF-001 Overdue

Username s804p902001

Name Rina Anton

Email rina.anton@email.com

Language English

Time Zone UTC-05:00 America/Toronto (EST)

Invite Sent

Registered 2025-10-30 at 17:40:28 UTC-04:00 by Demo Account (demo)

Last login 2025-10-31 at 12:03:44 UTC-04:00

Last sync 2025-10-30 at 18:02:09 UTC-04:00

Login support:

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

View logs:

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

[OK](#)

The dialog displays the subject's contact details and information about when and by whom the invitation was sent and the subject registered. The timing of when the participant last logged in to DFengage and the last time they synced data from DFengage are also displayed.

Name, email, and phone are displayed for users with ePRO Admin and ePRO Monitor permissions, and hidden for users with ePRO Viewer permissions.

Several actions are available from this dialog as described in the following sections. To close the dialog and return to the subjects list, click [OK](#).

Edit Subject Details

Click [Edit](#) next to the dialog title to modify the subject's details. The name, email, phone, language, and time zone may be changed after registration. The subject ID and username cannot be changed.

Subject details may only be edited by users with ePRO Admin permissions.

Login Support

If the participant needs help getting access to DFengage, invitation or login emails may be sent on demand. Access links may also be shared as needed with the participant using a text link or QR code if working with the participant in person or communicating directly with them.

If the participant has not yet confirmed their email address or set a password, resend the **invitation** or share the **invite link** or QR code directly with the study participant. Click [Resend invitation](#) to send the invitation email to the participant's registered email address, or click [Get link / QR code](#) to copy or scan the invite link.

If the participant knows their password but needs the link to access their activities, use the **login link**. Click [Send login link](#) to send the login link email to the participant's registered email address, or click [Get link / QR code](#) to copy or scan the login link.

If your study supports DFengage on both the web and mobile devices, the Get link / QR code dialog provides links and QR codes for both. Select [Web App](#) if the participant is using the web, and [Mobile App](#) if they are using the mobile application. If your study only supports one mode, only the links for that mode will be available.

Login support actions are only available for users with ePRO Admin permissions.

View Account and Access Logs

The **ePRO account log** shows the history of changes to the subject's user account, including registration and any subsequent updates to the subject details. This provides traceability for any changes to the participant's contact information over the course of the study. This log is not available for users with ePRO Viewer permissions since it includes PII.

The **ePRO access log** shows the history of the subject's activity in DFengage, including login, logout, start activity, and submit activity, providing insight into the participant's use of the ePRO app and assisting with any troubleshooting required. This log is available for all ePRO management users and does not include any PII.

Troubleshooting

Permission Requirements

DFweb requires the following role permissions defined in **DFadmin** for features to function:

- **API Clients** – **DFweb** permission is required to login to the study.
- **Server – Attach Document** permission is required to attach documents to CRFs.
- **DFdiscover Reports** report-specific permissions are required to view reports.
- **Server – Export Data** permission is required to download queries.
- **DFexplore - Print/Save – Images** grants the ability to download documents from the Manage Documents panel.

- **DFexplore - Print/Save – Reports** grants the ability to download reports in Reports view.
- **DFexplore - Views – Dashboard** controls access to the Dashboard view.
 - The Dashboard also requires permissions for reports DF_SBCrfoverview (Subject and CRF Status Overview), DF_QueryOverview (Query Overview), DF_SBsummary (Subject Summary), and DF_QueryDataSummary (Query and Data Entry Metrics).
- **DFexplore - Views – Data** controls access to the site/subject/CRFs/tasks.
- **DFexplore - Views – Queries** controls access to the Queries view.
- **DFexplore - Views – Reports** controls access to the Reports view.

Be sure to review each role and enable or disable these features as needed.

For access to the **ePRO Management** page, users require **ePRO Admin Permissions** assigned to them in **DFadmin**. The following permission types are available:

- **Admin:** Full access to register participants, send invitations and login links, update participant details, and view ePRO user change and access logs.
- **Monitor:** View access to the ePRO management page for monitoring, including access to personally identifying information (PII) such as participant name and email address.
- **ePRO Viewer:** View access to the ePRO management page for oversight, where PII including participant name and email address are not displayed.

DFweb Information for IT Teams

DFdiscover is a clinical data management system developed by DF/Net Research, Inc. DFdiscover includes a suite of tools that enable the capture, review, and export of clinical trial data for analysis and reporting. **DFweb** is a web-based tool for electronic data capture accessed via web browser. Compatible with the latest versions of Chrome, Firefox, Edge, and Safari on Windows and macOS. **DFweb** communicates with the DFdiscover server via API.

Your IT team must review the following network, firewall and security settings to be sure API access to DFweb is enabled:

Protocol and Port Requirements: **DFweb** requires HTTPS to communicate with DFdiscover servers. The specific ports required are included in the URLs after the colon in the domain name (443 if the port isn't shown).

Allowlist Required Domains: Ensure that the **DFweb** URL and DFdiscover API and server domains are added to the allowlist. This is essential to prevent blockages in data flow and access issues.

Do Not Modify Requests: Requests sent by **DFweb** must not be modified or intercepted. Any modification of requests (e.g., through proxies, plugins, or network security tools) can interfere with secure data transmission, disrupt application functionality, and compromise data integrity.

VPN Compatibility: If using VPN, allowlist the DFdiscover domains within your VPN settings.

Security Protocols: DFdiscover uses TLS 1.2 or higher.

User Authentication: **DFweb** supports multi-factor authentication (MFA), which is configured on a per-user basis at the study sponsor's discretion, as well as single sign-on with Microsoft Entra ID.

If, after IT review, you are still unable to connect, please contact your system administrator or DFdiscover support at help@dfnetresearch.com.

General Troubleshooting

This section provides some general troubleshooting tips for **DFweb**. If a page is taking longer than expected to load or loading with no information, or if you encounter an API, server, or other unexpected error or website problem, these are some options to try:

- **Refresh the page** Use the Refresh button in your browser window to reload the current page. Save any changes to CRF data before trying this option, since refreshing the page will discard any unsaved changes.
- **Log out** From the application menu in the top right, select **Logout** to end the current session and go back to the login page. Save any changes to CRF data before trying this option, since refreshing the page will discard any unsaved changes. Login again with your username and password to start a new session.
- **Clear the browser cache** If none of the above options work, you can clear the cache in your browser to remove data saved to your device that may be interfering with **DFweb** functionality. You may clear the cache for **DFweb** specifically or for all websites. For instructions on how to do this, use the following link that matches the browser you are using:
 - [Google Chrome](#),
 - [Firefox](#),
 - [Microsoft Edge](#),
 - [Safari](#).
- **Ask for help** Contact your study coordinator or **DFdiscover** administrator for assistance. Take a screenshot of the problem if you can and share it with them to help with further troubleshooting.
- **Update browser settings** If you are being logged out prior to the time set in DFweb, you may need to update your browser settings by doing the following:
 1. Open **DFweb** in the browser (no need to log in; only open an instance)
 2. At the top right of the browsers, click on the menu settings (three dots, hamburger, etc.)
 3. Go to **Settings**
 4. Click on **Performance**
 5. Under "**Always Keep these sites active**" (Chrome) or **Never put these sites to sleep** (Edge), click **Add/Add Site**
 6. You should see dfweb.dfdiscover.com (or the DFweb URL provided by the study team) listed under "**Add current sites**".
 - Click the box to the left and then click **Add**.
 - If you do not see the web address, click on "**Add sites manually**", enter dfweb.dfdiscover.com, and then click **Add**.
 7. Refresh the **DFweb** page

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External Software Copyrights

DFdiscover software uses several third-party software components as part of its server side and/or client tools.

The copyright information for each is provided below. If you would like to receive source codes of these third-party components, please send us your request at help@dfnetresearch.com.

DCMTK software package

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This software and supporting documentation were developed by

OFFIS e.V. R&D Division Health Eschereg 2, 26121 Oldenburg, Germany

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Jansson

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mpack/munpack

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This option is useful when you wish to copy part of the code of the Library into a program that is not a library.

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When a "work that uses the Library" uses material from a header file that is part of the Library, the object code for the work may be a derivative work of the Library even though the source code is not. Whether this is true is especially significant if the work can be linked without the Library, or if the work is itself a library. The threshold for

this to be true is not precisely defined by law.

If such an object file uses only numerical parameters, data structure layouts and accessors, and small macros and small inline functions (ten lines or less in length), then the use of the object file is unrestricted, regardless of whether it is legally a derivative work. (Executables containing this object code plus portions of the Library will still fall under Section 6.)

Otherwise, if the work is a derivative of the Library, you may distribute the object code for the work under the terms of Section 6. Any executables containing that work also fall under Section 6, whether or not they are linked directly with the Library itself.

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Also, you must do one of these things:

- a. Accompany the work with the complete corresponding machine-readable source code for the Library including whatever changes were used in the work (which must be distributed under Sections 1 and 2 above); and, if the work is an executable linked with the Library, with the complete machine-readable "work that uses the Library", as object code and/or source code, so that the user can modify the Library and then relink to produce a modified executable containing the modified Library. (It is understood that the user who changes the contents of definitions files in the Library will not necessarily be able to recompile the application to use the modified definitions.)
- b. Use a suitable shared library mechanism for linking with the Library. A suitable mechanism is one that
 - i. uses at run time a copy of the library already present on the user's computer system, rather than copying library functions into the executable, and
 - ii. will operate properly with a modified version of the library, if the user installs one, as long as the modified version is interface-compatible with the version that the work was made with.
- c. Accompany the work with a written offer, valid for at least three years, to give the same user the materials specified in Subsection 6a, above, for a charge no more than the cost of performing this distribution.
- d. If distribution of the work is made by offering access to copy from a designated place, offer equivalent access to copy the above specified materials from the same place.
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c3.js

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d3.js

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jwt-cpp

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QXIsx

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