



DFweb Version 5.7.0

Release Notes

Publication date: September 27, 2023

Copyright © 2023 DF/Net Research, Inc.

All rights reserved. No part of this publication may be re-transmitted in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without the prior written permission of DF/Net Research, Inc. Permission is granted for internal re-distribution of this publication by the license holder and their employees for internal use only, provided that the copyright notices and this permission notice appear in all copies.

The information in this document is furnished for informational use only and is subject to change without notice. DF/Net Research, Inc. assumes no responsibility or liability for any errors or inaccuracies in this document or for any omissions from it.

All products or services mentioned in this document are covered by the trademarks, service marks, or product names as designated by the companies who market those products.

Table of Contents

1. Introduction	3
<i>Overview</i>	3
<i>Supported Browsers and Devices</i>	3
<i>Compatibility</i>	4
<i>Permissions</i>	4
<i>Installation</i>	4
<i>Getting Help</i>	5
2. New Features and Enhancements	6
<i>Single Sign-On with Microsoft in DFweb</i>	6
<i>DFweb Dashboard</i>	7
<i>Query Age Details and Filters in DFweb</i>	8
<i>Queries Download to Excel in DFweb</i>	8
<i>Add New Visit Functionality</i>	9
<i>New Look for Reports</i>	9
<i>Subject Binder and CRF Header Interface Improvements</i>	10
<i>Subject Alias Supported in DFweb Reports</i>	10
<i>Additional Updates</i>	10
3. Known Issues and Advance Notices	12
<i>Known Issues</i>	12
<i>Advance Notices</i>	13

1. Introduction

Overview

DFweb is a browser-based application within the DFdiscover platform for online electronic data capture in clinical research. It provides a no-install data capture and management tool for clinical site staff and study teams, suitable for use on laptops, tablets, and smartphones. DFweb Version 5.7.0 is released with DFdiscover 2023 Version 5.7.0. Key updates to DFweb in this release include:

- **Single Sign-On with Microsoft:** Simplify the DFweb login experience using your authorized Microsoft account, streamlining user authentication and security.
- **Dashboard:** Gain valuable insights at a glance with an intuitive dashboard, enabling study progress monitoring and quick issue resolution.
- **Query Age Details and Queries Save to Excel:** Efficiently manage queries with age tracking and easily download to Excel for sharing and further analysis.
- **New Look for DFdiscover Reports:** Enjoy a refreshed and user-friendly interface for standard reports in DFweb.
- **Add New Visit Functionality:** New visits may be added manually to the subject binder in DFweb where allowed by the visit map.

Details of these changes and more are covered in the following chapter, [New Features and Enhancements](#). See the [DFdiscover 5.7.0 Release Notes](#) for details of changes to the server, API, and other client applications. The complete listing of all DFdiscover 5.7.0 changes by product area and type of change is available [in spreadsheet format](#).

Supported Browsers and Devices

DFweb Version 5.7.0 is supported on devices (desktops, laptops, tablets, smartphones) that run the following web browsers:

- Chrome 71 and newer
- Edge 79 and newer
- Firefox 65 and newer
- Opera 58 and newer
- Safari 12.1 and newer

The minimum recommended screen width is 400 pixels, except for studies using CRFs with backgrounds, 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.

Compatibility

The new features in DFweb Version 5.7.0 are only available when connecting to a DFdiscover server and API Version 5.7.0 or later, as noted in the following chapter.

If a version of DFweb will be used that does not match the current DFdiscover server version, ensure that the server or study **Version Strict** setting is **All minor versions supported** or **Minimum version supported** in **DFadmin**.

The public instance of DFweb available at <https://dfweb.dfdiscover.com> is upgraded to Version 5.7.0 shortly after release. The DFdiscover API available at dfws.dfdiscover.com is also upgraded to Version 5.7.0 at the same time.

For self-hosted clients with their own DFweb instance, we encourage upgrading DFweb at the same time as the DFdiscover server and API so that all new features, enhancements, and bug fixes are available.

Permissions

Before a user can login to DFweb, the DFdiscover server they are connecting to must have the DFWS feature enabled in the license. In addition, DFweb users require the following study role permissions (defined in DFadmin) for features to function:

- API Clients-DFweb is required to login to a study.
- Server-Attach Document is required to attach documents to CRFs.
- Permissions for individual DFdiscover reports are required to view those reports.
- **NEW:** Specific DFdiscover Reports are required for the dashboard:
DF_SBCrfoverview, DF_QueryOverview, DF_SBsummary, DF_QueryDataSummary.

Installation

As a browser-based web application, DFweb does not require end users to install anything. The public instance of DFweb with the latest version is available at <https://dfweb.dfdiscover.com>. Clients with their own instance of DFweb will provide a different URL to their end users.

When sharing the DFweb URL with end users, include the DFdiscover server name to simplify the login process. For example, to pre-define the DFdiscover server as

explore.dfdiscover.com, provide the URL:

<https://dfweb.dfdiscover.com?servername=explore.dfdiscover.com>

For self-hosted clients installing or upgrading their own instance of DFweb, please contact the DFdiscover support team at help@dfnetresearch.com.

Getting Help

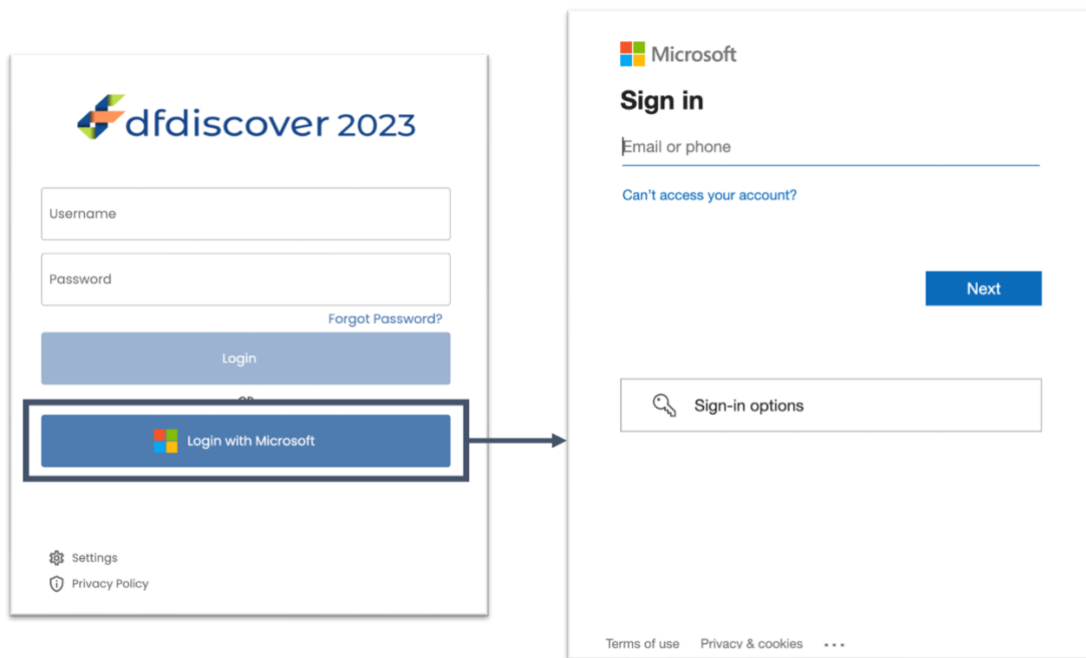
For software support, please contact the DFdiscover team via email at help@dfnetresearch.com or visit the DFnet website at <https://www.dfnetresearch.com>.

2. New Features and Enhancements

This chapter provides an overview of new features and enhancements in DFweb since the release of Version 5.6.0. Links in blue will take you to the relevant user guide with further information. The list of all DFdiscover 5.7.0 changes, including bug fixes, by product area and type of change is also available [here](#).

Single Sign-On with Microsoft in DFweb

DFweb now supports single sign on with Microsoft, allowing you to use your Microsoft account to login to DFweb when allowed by your organization. Your DFdiscover user account is linked to your Microsoft account by the email address registered in DFadmin.



When logging in with your Microsoft account, electronic signatures and any other instances where your password is requested will also require your Microsoft login. Your DFdiscover username and full name are used in the audit trail, electronic signatures, and on the User Profile page. The Change Password option will not be available on the User Profile page.

This feature is only available when connecting to DFdiscover server and API version 5.7 or later and when enabled on your DFdiscover server.

DFweb Dashboard

Gain valuable insights at a glance with an intuitive dashboard, empowering you to monitor study progress and quickly identify and address outstanding issues.

The dashboard provides an interactive overview of study data, subject data quality, metrics, and study help.

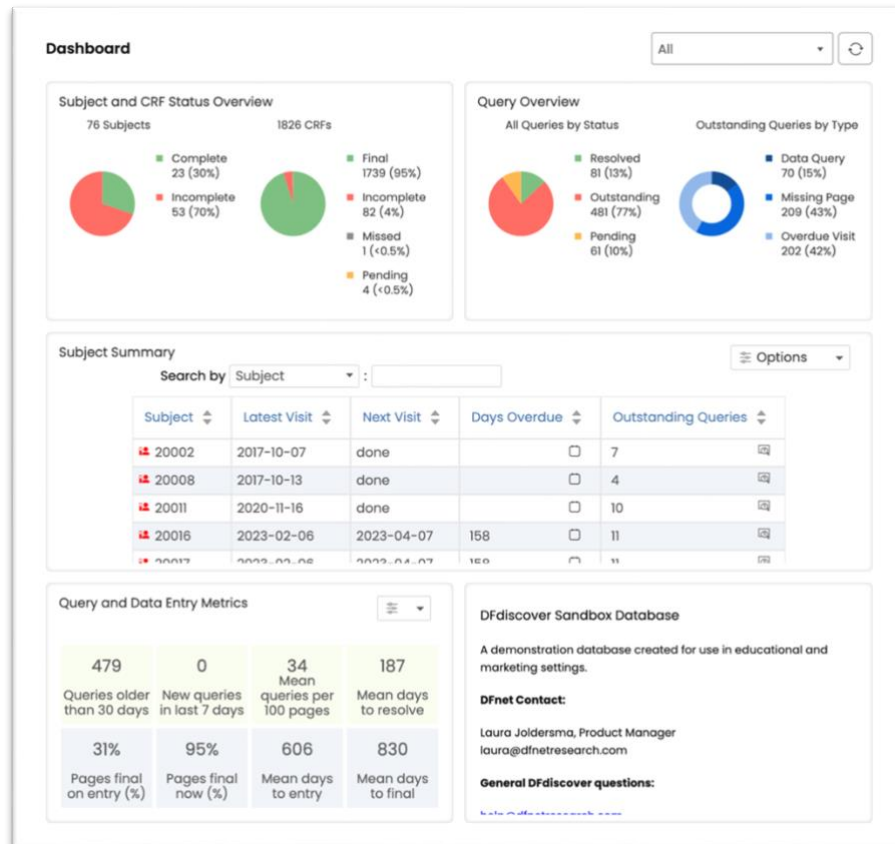
In the first two tiles, click a pie chart segment or legend marker to see that list of subjects, CRFs, or queries and open them on the Subjects page for review.

The Subject Summary report lists active subjects with ongoing follow-up or outstanding queries. Use the Options button to view complete subjects (visits completed, no outstanding

queries) or all subjects. Click the calendar icon for the subject's visit schedule and open any visit on the Subjects page. Click the queries icon to see the list of outstanding queries and open the queries list on the Subjects page.

The dashboard includes data for all sites by default and can be filtered to show data for an individual site. If you have access to multiple sites in a large study or are on a slow connection, only site-specific dashboards are available. A new preference 'Auto-Load All Sites Dashboard' can be disabled to only view site-specific dashboards for faster loading times. [See details](#).

This feature is only available when connecting to DFdiscover server and API version 5.7 or later.



Query Age Details and Filters in DFweb

Efficiently manage queries with detailed age tracking on the Queries page.

A new, sortable Age column has been added, showing the number of days since the query was created for outstanding/pending queries or days from creation to resolution for resolved queries. The Timing column has been updated to include creation details and to remove the time (single-click the date to show the time details in a tooltip).

The Query Filters dialog now includes a filter for subject ID, and the Timing filters have been updated to identify queries created or modified before or after a certain number of days ago. [See details.](#)

Location	Query Header	Query Details	Age	Timing
10003 Enrollment/Vaccination #1 Injection Administration	2. Injection Date = 13/AUG/2017 (Other) Outstanding	Detail: Please confirm.	1446 days	Modified: krysta Sep 27, 2019 Created: krysta Sep 27, 2019
10003 Day 1 Laboratory Results-Hematology	Platelets Result = 0040 (illegal) Outstanding	Detail: Platelets Result has a value of 0040, which is inconsistent with our expected legal range of 130-400. Please verify that this value is correct	1062 days	Modified: mwessel Oct 15, 2020 Created: mwessel Oct 15, 2020
10003 Day 2 Missed Visit	2. Why did the ppt miss the visit? = (Missing) Outstanding	Detail: Please update once clarification is available. Thank you. Reply: Waiting for clarification from study nurse	139 days	Modified: laura Apr 27, 2023 Replied: laura Apr 27, 2023 Created: laura Apr 26, 2023
10003 Day 3 Laboratory Results-Chemistry	BUN Result = 25.0 (Monitor) Outstanding	Detail: Does not match source data	21 days	Modified: karolyn Aug 22, 2023 Created: karolyn Aug 22, 2023

Query Filters Site 10 - New York Subject Id

Status
 Outstanding Pending Resolved

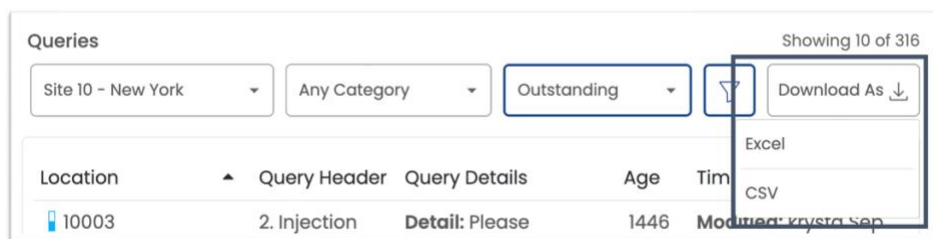
Category
 Monitor Safety Missing Illegal
 Inconsistent Illegible Fax Noise Missing Page
 Overdue Visit EC Missing Page Clinical Coding Other

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

Showing 218 of 316 OK

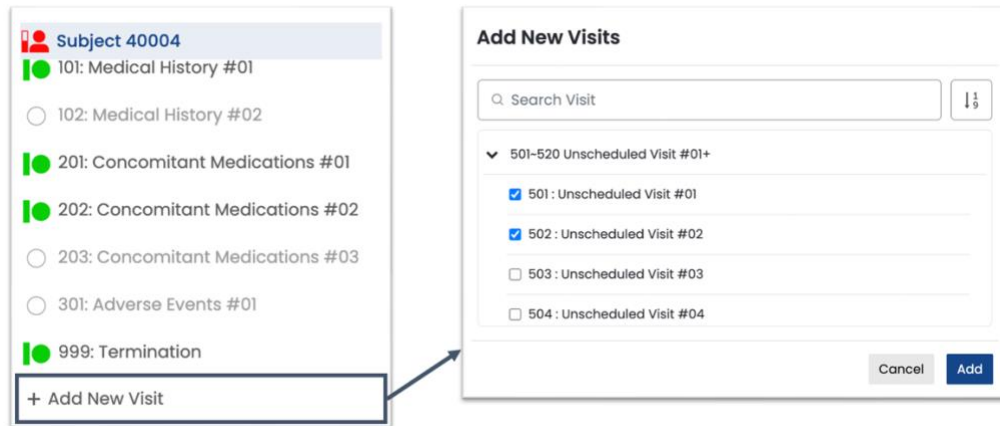
Queries Download to Excel in DFweb

Queries can be downloaded to Excel or CSV format. The current list of queries displayed are downloaded, with filters and sorting applied. This feature is only available when connecting to a DFdiscover server and API version 5.7 or later. [See details.](#)



Add New Visit Functionality

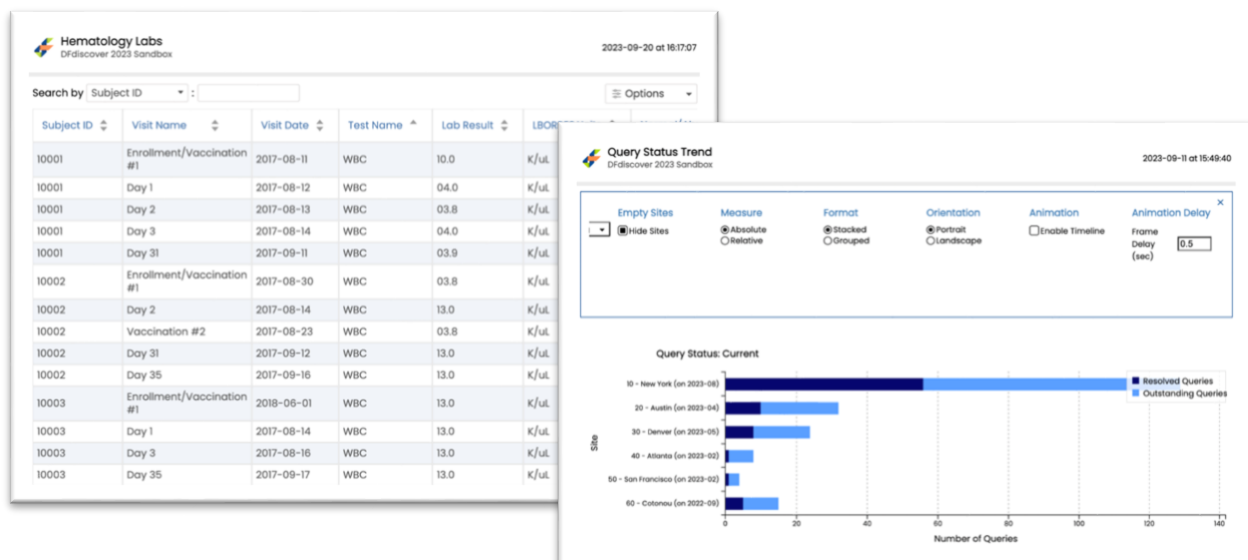
New visits may be manually added to the subject binder in DFweb. An "Add New Visit" button is available at the bottom of the subject binder. When allowed by the visit map (defined by using ~ instead of - for a visit number range), clicking 'Add New Visit' opens a dialog to select which visit to add. If not allowed, the button is disabled.



This feature requires DFdiscover server and API version 5.6 or later. Note that when connecting to a 5.6 server, the label displayed for the CRF at these visits will be the plate label, not the label defined in the page map.

New Look for Reports

[DFdiscover reports](#) have a new look and improved usability on smaller screens (tablets and phones). The Options panel now opens above the report output. These updates are available when connecting to DFdiscover server and API version 5.7 or later.



Subject Binder and CRF Header Interface Improvements

The subject binder and CRF header have some updates to improve the user experience:

- It's now possible to manually collapse and expand the subject binder sidebar using the blue double arrow icon to the left of the CRF label, providing more screen space for data entry and review.
- The sidebar still collapses automatically on phone screens and now displays the double-blue arrow icon in place of the hamburger icon. When the sidebar is expanded on phone screens, it overlays the screen and now remains open when switching to a different visit, while the first CRF in the visit opens behind the sidebar. Tap anywhere outside the sidebar to close it.
- In the subject binder, the labels for blank visits and CRFs are now a lighter color than completed visits and CRFs, and CRFs are more indented to make them easier to distinguish from the list of visits.
- The CRF menu icon (to the right of the Save button) has a new look.

Subject Alias Supported in DFweb Reports

When the 'Use Subject Alias setting' is enabled on the Settings page, the subject alias is used in Reports in place of the subject ID, in both report output and filter options. This feature requires DFdiscover server and API version 5.7 or later.

Additional Updates

- The Settings page now displays details about the time zone in UTC (Coordinated Universal Time) used for timestamps shown in DFweb, including the local time zone detected on the device. The accuracy of these time zones is dependent on the local device time being correct.
- Site statistics are no longer displayed by default on the Subjects page when a site is selected. The "Auto-Load Subject Statistics" setting has been changed to "Load Subject Statistics" which remains disabled by default. This change improves loading time for large studies. Enable this setting to view site statistics on the Subjects page.
- On the login page, the "Continue" button now reads "Login".
- A bug was fixed on the DFweb login page where you needed to press Enter/Return twice after entering your password to login.

- A warning is now displayed if a user will be logged out when clicking the browser's Back button, allowing them to cancel the logout and remain on the current page.
- The Subjects page now displays subjects within a smaller panel after selecting a site, when you have access to more than one site. Scroll to view additional subjects, or use the search field to filter the subjects within the panel.
- DFweb has been upgraded to Flutter 3.7.7 and Angular 15.
- Security updates have been applied.
- Minor user interface corrections and improvements have been made throughout DFweb.
- See all bug fixes [here](#).

3. Known Issues and Advance Notices

Known Issues

This section provides information about low-severity, low-priority issues that exist in the current release, with details about available workarounds. Generally, issues are planned to be addressed in a future release.

1. In the unlikely case that a user saves a record to a workflow level they do not have view access to, the record status shows as missed instead of blank. As a workaround, close and reopen the subject binder to see the correct record status.
2. When trying to view a PDF document in the Manage Documents dialog on Android mobile browsers, the PDF document may not be shown. As a workaround, use the download option provided in the dialog beside the expand button.
3. In the unlikely case an unexpected record is added to the subject binder in DFweb using the `dfaddmpqc` edit check function and then deleted with `dfdelpqc`, the record status is not updated to blank. As a workaround, close and reopen the subject binder to see the correct status.
4. In the unlikely case that the `dftrigger` edit check function is used to open an unexpected record for a different subject in DFweb, the subject binder will not load properly. As a workaround, add the unexpected record to the visit map and use the `dfneed` edit check function in the `DFopen_patient_binder` edit check to exclude the record from the subject binder when you don't want it to be displayed.
5. When using browser settings to increase the font size, DFweb does not handle the increased text size consistently across the app. As a workaround, use the normal font size setting and instead use zoom settings to improve visibility.
6. DFweb may stop working if an edit check using the `dftrigger` function with " " in the edit check list is triggered. As a workaround, remove the space from the edit check list in the `dftrigger` function parameters.
7. When date fields are defined in `DFsetup` without the day and/or month in the format (e.g., YYYY or MMM-YYYY) and the `Impute` field property set to "Never", DFweb will treat any value entered as illegal. As a workaround, set the `Impute` field property to any value other than "Never".
8. In DFweb Reports, if a report filter dropdown is open when the user is auto logged out after inactivity, the user is successfully logged out but the report will remain open until it is closed manually.

9. In DFweb Reports, when resizing the browser window between desktop and tablet size while a report filter popup is open, the popup may remain open after closing the report.
10. In the unlikely case that a user manually adds a visit using the Add New Visit dialog in DFweb when there are no plates defined for that visit or the user does not have permission for any plates at that visit, DFweb will display an error message and the visit will not be added.

Advance Notices

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

1. In DFweb, multimedia hosted on a non-HTTPS server (e.g., embedded images and video in study, plate, or field help) is currently supported. In a future release, we will restrict these to HTTPS only. To plan ahead, replace any HTTP multimedia sources with HTTPS.