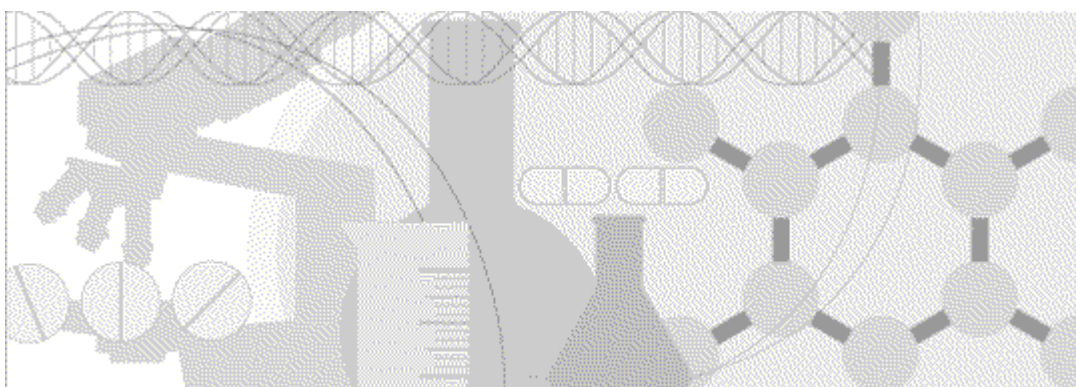


# Upgrade and Migration Guide

InForm<sup>™</sup> GTM 5.5.2.1



ORACLE®

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## Overview of this guide

The *Upgrade and Migration Guide* provides instructions for upgrading and migrating the InForm software and InForm Portal software to the current InForm release, and for upgrading the Cognos 8 Business Intelligence software for use with the Reporting and Analysis module. The guide also describes any changes and additions made to the database schema, MedML, and resource files.

## Audience

This guide is for database and system administrators who are responsible for upgrading or migrating the InForm software and InForm Portal software to the current InForm release, and for upgrading the Cognos 8 Business Intelligence software for use with the Reporting and Analysis module.



# Documentation

All documentation is available from the Oracle Software Delivery Cloud (<https://edelivery.oracle.com>) and the Download Center (<https://extranet.phaseforward.com>).

InForm documentation	
Document	Description
<i>Release Notes</i>	The <i>Release Notes</i> document describes enhancements introduced and problems fixed in the current release, upgrade considerations, release history, and other late-breaking information.
<i>Known Issues</i>	The <i>Known Issues</i> document provides detailed information about the known issues in this release, along with workarounds, if available.
<i>Upgrade and Migration Guide</i>	The <i>Upgrade and Migration Guide</i> provides instructions for upgrading and migrating the InForm software and InForm Portal software to the current InForm release, and for upgrading the Cognos 8 Business Intelligence software for use with the Reporting and Analysis module. The guide also describes any changes and additions made to the database schema, MedML, and resource files.
<i>Secure Configuration Guide</i>	The <i>Secure Configuration Guide</i> provides an overview of the security features provided with the Oracle® Health Sciences InForm application, including details about the general principles of application security, and how to install, configure, and use the InForm application securely.
<i>Installation Guide</i>	The <i>Installation Guide</i> describes how to install the software and configure the environment for the InForm application and Cognos 8 Business Intelligence software.
<i>Study and Reporting Setup Guide</i>	The <i>Study and Reporting Setup Guide</i> describes how to perform the tasks that are required to set up an InForm study and configure the Reporting and Analysis module for the study.
<i>User Guide</i>	<p>The <i>User Guide</i> provides an overview of the InForm application including details on multilingual studies, how to navigate through the user interface, and how to use the application to accomplish typical tasks you perform while running a clinical study.</p> <p>This document is also available from the Documentation CD and the InForm user interface.</p>
<i>Reporting and Analysis Guide</i>	<p>The <i>Reporting and Analysis Guide</i> provides an overview of the Reporting and Analysis module. It includes a brief overview of the Reporting and Analysis interface, illustrates how to access the Ad Hoc Reporting feature, and describes the study management and clinical data packages available for Reporting and Analysis. It also provides detailed descriptions of each standard report that is included with your installation.</p> <p>This document is also available from the Documentation CD.</p>

InForm documentation	
Document	Description
<i>Utilities Guide</i>	<p>The <i>Utilities Guide</i> provides information about and step-by-step instructions for using the following utilities:</p> <ul style="list-style-type: none"> <li>• PFConsole utility</li> <li>• MedML Installer utility</li> <li>• InForm Data Import utility</li> <li>• InForm Data Export utility</li> <li>• InForm Performance Monitor utility</li> <li>• InForm Report Folder Maintenance utility</li> </ul> <p>This guide also provides reference information for the MedML elements and scripting objects that are used to import and export data to and from the InForm application, as well as sample data import XML.</p> <p>This document is also available from the Documentation CD.</p>
<i>Reporting Database Schema Guide</i>	<p>The <i>Reporting Database Schema Guide</i> describes the Reporting and Analysis database schema.</p>
<i>Portal Administration Guide</i>	<p>The <i>Portal Administration Guide</i> provides step-by-step instructions for setting up the InForm Portal software, and configuring and managing the InForm Portal application.</p> <p>This document is also available from the Documentation CD.</p>
MedML Installer utility online Help	<p>The MedML Installer utility online Help provides information about, and step-by-step instructions for using, the MedML Installer utility, which is used to load XML that defines study components into the InForm database.</p> <p>This guide also provides reference information for the MedML elements and scripting objects that are used to import and export data to and from the InForm application, as well as sample data import XML.</p> <p>This document is also available from the user interface.</p>
InForm Data Export utility online Help	<p>The InForm Data Export utility online Help provides information about and step-by-step instructions for using the InForm Data Export utility, which is used to export data from the InForm application to the following output formats:</p> <ul style="list-style-type: none"> <li>• Customer-defined database (CDD).</li> <li>• Name value pairs.</li> </ul> <p>This document is also available from the user interface.</p>
InForm Data Import utility online Help	<p>The InForm Data Import utility online Help provides information about and step-by-step instructions for using the InForm Data Import utility, which is used to import data into the InForm application.</p> <p>This document is also available from the user interface.</p>

## If you need assistance

Oracle customers have access to support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info>, or if you are hearing impaired, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs>.



CHAPTER 1

# Upgrading and migrating to the InForm 5.5.2.1 release

**In this chapter**

Overview of upgrading and migrating to this release .....2

Requirements for the InForm studies you can migrate.....3

Hardware and software requirements for the InForm 5.5.2.1 release.....4

## Overview of upgrading and migrating to this release

You can perform a new installation of the InForm 5.5.2.1 software, or you can upgrade and migrate to the InForm 5.5.2.1 software from a previous version of the InForm software.

To perform a new installation, see the *Installation Guide*.

To perform an upgrade and migration, perform the following steps, as needed:

- **Upgrade the database environment**—If you are upgrading to the InForm 5.5.2.1 release from an environment that uses the Oracle 9i database software, you must upgrade to either the Oracle 10g database or Oracle 11g database software. For more information, see *Upgrading the database environment* (on page 5).

**Note:** This step is required only if you are upgrading from an InForm 4.6, InForm 4.7, or InForm 5.0 study; it is not required if you are upgrading from an InForm 5.5 study.

- **Migrate the InForm studies**—You can upgrade to the InForm 5.5.2.1 software from the InForm 4.6 SP2 release or later, any InForm 4.7 release, any InForm 5.0 release, or any InForm 5.5 release. You use a series of scripts to upgrade your InForm studies. For more information, see *Migrating the InForm studies to this release* (on page 7).
- **Upgrade the reporting environment**—Optional. Use this step to upgrade your reporting environment for any InForm 4.6 SP2 studies or later, any InForm 4.7 studies, any InForm 5.0 studies, or any InForm 5.5 studies. This is required only if you are using the Reporting and Analysis module. For more information, see *Upgrading the reporting environment* (on page 41).
- **Migrate the InForm Portal software**—Optional. Use this step to upgrade or migrate the InForm Portal software for the InForm 5.5.2.1 release. This is required only if you are using the InForm Portal software. For more information, see *Migrating the InForm Portal software* (on page 55).

## Requirements for the InForm studies you can migrate

You can upgrade to the InForm 5.5.2.1 software from the InForm 4.6 SP2 release or later, any InForm 4.7 release, any InForm 5.0 release, or any InForm 5.5 release.

There are no limitations on migrating studies from any InForm 4.7 release, any InForm 5.0 release, or any InForm 5.5 release.

However, you can only migrate InForm 4.6 studies that meet the following criteria.

- The study is deployed in the InForm 4.6 SP2 release or later.
- The study must be deployed in the English (en-US) language.

The Study Version in the Central Designer application indicates the study language.

You cannot migrate studies to the InForm 5.5.2.1 release that:

- Use synchronization.
- Were deployed in any of the following InForm releases, even if they were updated to the InForm 4.6 SP2 release:
  - InForm 4.0
  - InForm 4.1
  - InForm 4.5 prior to the InForm 4.5 SP3b release.

## Hardware and software requirements for the InForm 5.5.2.1 release

Before upgrading and migrating to the InForm 5.5.2.1 release, review the hardware and software requirements in the *Release Notes*.



## CHAPTER 2

# Upgrading the database environment

### In this chapter

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## Overview of upgrading the database environment

This step is required only if you are upgrading from an InForm 4.6, InForm 4.7, or InForm 5.0 study; it is not required if you are upgrading from an InForm 5.5 study.

If you are upgrading to the InForm 5.5.2.1 release from an environment that uses the Oracle 9i database software, you must upgrade to either the Oracle 10g database software or the Oracle 11g database software.

**Note:** Oracle recommends the Oracle 11g database software.

- For information on which versions of the Oracle database software are supported, see the *Release Notes*.
- For information on installing the Oracle 10g database or Oracle 11g database software, see your Oracle database documentation.
- For information on the database parameter settings, and guidance on installing and configuring the Oracle database software for the InForm environment, see the *Installation Guide*.

**Note:** Oracle does not support an in-place or direct upgrade from the Oracle 9i database or Oracle 10g database to the Oracle 11g database software. You must export studies from an Oracle 9i environment or an Oracle 10g environment, import them into an Oracle 11g environment, and then proceed with the rest of the upgrade.

CHAPTER 3

Migrating the InForm studies to this release

In this chapter

Overview of migrating the InForm studies to this release..... 8

Upgrade to a new Oracle database environment.....9

Steps to prepare to migrate the InForm studies .....10

Steps to migrate InForm 4.6, InForm 4.7, or InForm 5.0 studies .....21

Steps to migrate InForm 5.5 studies .....32

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## Overview of migrating the InForm studies to this release

You can upgrade to the InForm 5.5.2.1 software from the InForm 4.6 SP2 release or later, any InForm 4.7 release, any InForm 5.0 release, or any InForm 5.5 release. You use a series of scripts to upgrade your InForm studies.

For more information, see:

- *Requirements for the InForm studies you can migrate* (on page 3).
- *Steps to migrate InForm 4.6, InForm 4.7, or InForm 5.0 studies* (on page 21).
- *Steps to migrate InForm 5.5 studies* (on page 32).
- *Steps to migrate InForm 5.5 studies in a new environment* (on page 37).

## Upgrade to a new Oracle database environment

- 1 Create a new Oracle 10.2 database environment or a new Oracle 11.2 database environment.
- 2 Create new study databases in the new Oracle 10.2 environment or new Oracle 11.2 environment.

For more information, see your Oracle database documentation.

## Steps to prepare to migrate the InForm studies

To prepare to migrate the InForm studies:

- 1 Review the following topics:
  - *Database and file customizations* (on page 11).
  - *Character set differences* (on page 12).
  - *Query length limitations* (on page 12).
  - *Clinical view names for reports, RDEs, and data mappings* (on page 12).
  - *Oracle 10g database and Oracle 11g database import recommendations* (on page 13).
  - *Changed resource files* (on page 14).
- 2 *Create backup files* (on page 16).
- 3 *Prepare the InForm 4.6 study database schema for backup* (on page 17).
- 4 Back up the InForm study database.
  - *Back up an InForm 4.6, InForm 4.7, or InForm 5.0 study database* (on page 18).
  - *Back up an InForm 5.5 study database* (on page 19).
- 5 *Record study, customer-defined database, and connection information* (on page 20).

## Considerations before you migrate

### Database and file customizations

For lists of changes to the InForm 5.5 software that might affect your customizations, see *Database and file changes* (on page 65).

- Database schema objects created or customized outside of the standard InForm application are not supported for upgrade and can cause errors during the migration process.

**Note:** Oracle does not support migrating tables created outside of the standard InForm application schema or by Enterprise Adoption customers. These tables might cause errors when you import the study DMP files.

- Any schema customization must have an upgrade path that results in a valid InForm 5.5 schema at the point in the migration where you create the review schema. For more information, see *Create new database objects for the review schema* (on page 28).

You can record the customizations, and reintroduce them after you complete the standard migration procedures. Such customizations might include changes to:

- Views
- Functions
- Procedures
- Packages
- Triggers

**Note:** If any schema objects such as views, functions, procedures, packages, or triggers are invalid, `pfadmin RECREATEREVIEWSCHEMA` fails. You must repair any invalid schema objects before you can rerun `pfadmin RECREATEREVIEWSCHEMA`.

- Any study resources that have been customized for deployment must be addressed separately before migration.

The customized changes must be modified to comply with the InForm 5.5 software and InForm 5.5 MedML schema and reinstalled so that the customized changes are not lost due to the upgrade.

## Character set differences

Character set differences between the InForm 4.6 release and the InForm 5.5 releases might cause issues with table column widths.

To prevent these issues, you must prepare the InForm 4.6 database schemas before you migrate.

For more information, see:

- *Prepare the InForm 4.6 study database schemas for backup* (on page 17).
- *Prepare the InForm 4.6 InForm Portal database schema for backup* (on page 57).

## Query length limitations

If you are migrating a study from an InForm 4.6 release, you need to review the query lengths.

If a query includes Latin-1 characters and is close to the query text size limit (4000 bytes), the query may exceed the size limit after the Latin-1 characters are converted to UTF-8 characters during the migration to the InForm 5.5 release.

If the query size exceeds the field limit, the query will be truncated.

Contact Oracle Global Support if you find any queries that have been truncated during the migration.

## Clinical view names for reports, RDEs, and data mappings

Clinical view names for reports, RDEs, and data mappings that contain more than 30 characters are truncated during the migration, and are appended with a sequence number.

After the migration, any truncated view names may not map to the forms as expected.

The view name is the combination of the form name and the itemset name. Therefore, this can occur if your study contains forms with two or more itemsets with names that are the same for the first 30 characters.



## Oracle 10g database and Oracle 11g database import recommendations

Oracle recommends the following when importing previously exported studies into an Oracle 10g database or Oracle 11g database.

- Use single-user imports for importing study data into the new Oracle database.

**Note:** Do not import streams metadata from an Oracle 9i database to an Oracle 10g database, or from an Oracle 10g database to an Oracle 11g database.

Before you import the study into the study database, set the Oracle database import parameters **STREAMS\_CONFIGURATION** and **STREAMS\_INSTANTIATION** to **N**.

- Do not import the **STRMADMIN** user and **STRMADMIN** proxy user into the Oracle 10g database or the Oracle 11g database.
- Set **grants=N** for the import.

If you set **grants=Y**, grants to the streams proxy user from the Oracle 9i database or the Oracle 10g database may be attempted, but might not work, causing error messages to appear during the import.

**Note:** If you are importing study databases that were used in an environment that includes the InForm Adapter application, you might encounter **Oracle error 31167: XML nodes over 64K in size cannot be inserted**. You can ignore this error.

**Note:** If an export was done for a study schema that contained the Reporting and Analysis module installed in the same database as the study, messages might appear, saying that the database tables contain a ROWID column, and that values might be obsolete. You can ignore these messages. The messages are related to the materialized views that are being imported. The reporting upgrade script you run later removes the materialized views that were imported.

**Note:** If an export was done for a study schema that contained the Reporting and Analysis module installed in a different database from the study, an error message might appear, saying that the system could not create a database link. You can ignore this message. This database link is not necessary for the study. If it exists after import, it is removed by the reporting upgrade scripts that you run later.

## Changed resource files

If you customized any resource files, back them up before you upgrade to avoid losing your customizations.

After upgrading, you should review any customizations you made to resources in your previous release and determine whether to reapply them to this release. To reinstall customized resource files, use the MedML Installer utility.

### Files updated in InForm release 5.5.2.1

...\InForm\XMLBase

sysVolume.xml

...\InForm\XMLBase\Help

Version.htm

### Files updated in InForm release 5.5.2

...\InForm\Resources\Enu and ...\InForm\Resource\Jpn

FORGOTPWD.HTML

FORGOTPWDCORRECT.HTML

Login.css

Login.html

formhelper.js

resetpwdnotification.txt

...\InForm\XMLBase

sysVolume.xml

sysform\_Password.xml

...\InForm\XMLBase\Help

Version.htm

## Files updated in InForm release 5.5.1

...\InForm\Resources\Enu and ...\InForm\Resource\Jpn

EQACTITLEENROLLAUDITFORM.HTML

EQACTitleNoFrame.html

Formhelper.js

Mainstyles.css

Pfscript.js

Printscripts.js

QueryFormActionBindScript.html

QueryFormActionChangedScript.html

VertDeepNoEditRadioButton.html

VertNoEditRadioButton.html

...\InForm\XMLBase

SysVolume.xml

SysVolume.xmltmpl

...\InForm\XMLBase\Help

Version.html

Version.xmltmpl

## Create backup files

- 1 Stop all studies and servers, using the following command:

**PFADMIN STOP SERVER <servername> /Trials**

- 2 Back up all customized screens, images, reports, and database scripts, such as views, so they can be reapplied after the upgrade.

Also, back up any other files you might have created or copied to the InForm folder tree, including files in the **InForm\Trials** folder.

Examples:

- Changes to reason drop-down lists on CRF detail pages.
- Logo files and other images.

For more information, see *Database and file customizations* (on page 11).

- 3 If you are using the Reporting and Analysis module or if you made any customizations, save and back up the current registry settings from all servers, including the InForm server and the Reporting and Analysis server in **HKEY\_LOCAL\_MACHINE\SOFTWARE\Phase Forward\AuthenticationFilter**.

**Note:** These values are reset to their defaults when you re-install the InForm software or when you run the Reporting and Analysis installer.

- 4 Back up all of the files for each study.

These objects are located in the <InstallationDirectory>\InForm\Trials folder.

- 5 Create a backup of the Central Designer rule engines.

The rule engine for studies that are created in the Central Designer application is saved in the <InstallationDirectory>\InForm\Bin\DesignerVersion<Version\_Number> folder.

- To create a backup, copy all the files in every DesignerVersion<Version\_Number> folder to another location.

These folders include the Central Designer rule engine, external functions, COM interoperability libraries, and configuration files.

- 6 If the CIS software is installed on the InForm application server, you must uninstall it.

Use the **Control Panel > Add/Remove Programs** option to remove the CIS software.

## Prepare the InForm 4.6 study database schema for backup

If you are migrating an InForm 4.6 study, you must prepare the InForm 4.6 study database schema for backup before migrating to the InForm 5.5 release.

**Note:** Character set differences between the InForm 4.6 release and the InForm 5.5 releases might cause issues with table column widths. Perform this step to prevent these issues.

- 1 Copy the InForm\InstallSupport folder from the downloaded ISO image to the InForm 4.6 application server.
- 2 Run **UpgradeTrialSchema.cmd** (located in the InForm\InstallSupport folder) on the InForm 4.6 application server to prepare the InForm 4.6 study schemas for backup, using the following syntax:

```
UpgradeTrialSchema.cmd <TNS_Service_Name> <System_User> <System_Password>
<Trial_UserID> <Trial_User_Password>
```

where:

- **TNS\_Service\_Name**—TNS name for the database instance.
- **System\_User**—Oracle database system user.
- **System\_Password**— Password for the Oracle database system user.
- **Trial\_UserID**—Owner of the study database schema.
- **Trial\_User\_Password**—Password for the owner of the study database schema.

The UpgradeTrialSchema command creates a log file **Install\_upgrade\_log\_<current-date>\_<current-time>.txt** in the current directory.

**Note:** If error messages indicating that the system cannot find the paths specified for the System Product Locale and the System Study Locale appear, disregard the messages and continue with the migration.

- 3 If your InForm 4.6 study has reporting installed, run **deinstall\_reporting\_diffdb.sql** and **remove\_streams\_setup\_info\_diffdb.sql** to remove the reporting objects in the study schema.

**Note:** If you are using a single database for your study and reporting, run only **deinstall\_reporting\_samedb.sql** to remove the reporting objects.

For more information, see *Remove the streams between the InForm study schema and the Cognos 8.2 environment, and uninstall the Reporting schema* (on page 48).

## Back up the InForm study database

### Back up the InForm 4.6, InForm 4.7, or InForm 5.0 study database

If you are migrating an InForm 4.6, InForm 4.7, or InForm 5.0 study, backing up the InForm study database is required. You will import the DMP file you create in this step during the migration to the InForm 5.5.2.1 release. For more information, see *Import the DMP files* (on page 24).

To back up an InForm 4.6, InForm 4.7, or InForm 5.0 study database to a DMP file:

- 1 Copy the InForm\InstallSupport folder from the downloaded ISO image to the InForm application server.
- 2 Run **ExportDBUpgrade.cmd** (located in the InForm\InstallSupport folder) on the InForm application server to back up each InForm study database as a DMP file, using the following syntax:

```
ExportDBUpgrade.cmd <DMP_file> <TNS_Service_Name> <Trial_UserID>  
<Trial_User_Password>
```

where:

- **DMP\_file**—Name of the DMP file, using the full path.

**Note:** Do not include spaces in the DMP file name.

- **TNS\_Service\_Name**—TNS name for the database instance.
- **Trial\_UserID**—Owner of the InForm study database schema.
- **Trial\_User\_Password**—Password for the owner of the InForm study database schema.

Example:

```
ExportDBUpgrade.cmd D:\PFSP46.dmp TRIAL1 PFST46UID PFST46PID
```

The ExportDBUpgrade command creates a log file **<DMP\_file>.log** in the current directory.

## Back up the InForm 5.5 study database

If you are migrating an InForm 5.5 study, backing up the InForm study database is considered good clinical practice but is not required. You must ensure that the **TNS\_Service\_Name** entry points to the study instance, and that the **Trial\_UserID** and the **Trial\_User\_Password** are the same as those used in the InForm 5.5 installation.

To back up the InForm 5.5 study database to a DMP file:

- 1 Copy the InForm\InstallSupport folder from the downloaded ISO image to the InForm database server.
- 2 Run **ExportDB.cmd** (located in the InForm\InstallSupport folder) on the InForm database server to back up each InForm study database as a DMP file, using the following syntax:

```
ExportDB.cmd <TNS_Service_Name> <Physical_Directory_Path> <DMP_File_Name>
<System_User> <System_User_Password> <Study_User> <Study_User_Password>
<Target_Database_Version>
```

where:

- **TNS\_Service\_Name**—TNS name for the database instance.
- **Physical\_Directory\_Path**—Location of the directory that you created on the InForm database server for the data pump.
- **DMP\_File\_Name**—Name of the DMP file to export.

**Note:** Do not include spaces in the DMP file name.

- **System\_User**—Oracle database system user.
- **System\_Password**—Password for the Oracle database system user.
- **Study\_User**—Owner of the system database.
- **Study\_User\_Password**—Password for the owner of the system database.
- **Target\_Database\_Version**—Version of the database where the DMP file will be exported. This is required if the target database is an older version than the database exporting the DMP file.

For example:

```
ExportDB.cmd trial11 /u01/app/oracle/dp_export pfst46.dmp system oracle
pfst46uid pfst46pid
```

The ExportDB command creates the log file **<DMP\_File>.log**.

## Record study, customer-defined database, and connection information

- 1 Run the pfadmin command using the following syntax:  
`pfadmin view service`
- 2 Record the following information for each server and study:
  - Study name, UID, and PID.
  - CDD DSN, UID, and PID.
- 3 Record the database connection information.



# Steps to migrate InForm 4.6, InForm 4.7, or InForm 5.0 studies

To migrate a study from the InForm 4.6 SP2 release or later, any InForm 4.7 release, or any InForm 5.0 release to the InForm 5.5.2.1 release, perform the following steps:

- 1 *Uninstall the existing version of the InForm software* (on page 22).
- 2 *Install the InForm 5.5.2.1 software* (on page 22).
- 3 *Create the database user* (on page 23).
- 4 *Grant the database user privileges* (on page 23).
- 5 *Create tablespaces other than INFORM* (on page 23).
- 6 *Import the DMP files* (on page 24).
- 7 *Set up the InForm servers, studies, and customer-defined databases* (on page 25).
- 8 *Restore the Central Designer rule engines to the original location* (on page 26).
- 9 *Upgrade the study schemas to the InForm 5.5.2.1 release* (on page 27).
- 10 *Update the statistics for the InForm studies* (on page 27).
- 11 *Start the InForm server* (on page 27).
- 12 *Create new database objects for the review schema* (on page 28).
- 13 *Set the MEDMLINSTALLER server* (on page 29).
- 14 *Upgrade the study resources* (on page 29).
- 15 *Set the locale for InForm 4.6 sites and users* (on page 30).
- 16 *Perform the final study configuration* (on page 31).
- 17 *Restore the Windows registry settings* (on page 31).
- 18 *Install or upgrade the InForm Adapter software* (on page 31).
- 19 *Start the InForm studies* (on page 31).

## Uninstall the existing version of the InForm software

Before you can install the InForm 5.5.2.1 software on the same machine where you installed a previous version of the InForm software:

- 1 Uninstall the previous version of the InForm software. This step is required.
- 2 Optionally, create a database DMP file of each study database.

**Note:** If you are using Reporting, you must uninstall the Reporting schema before you create the DMP file of the study data. For more information, see *Back up the InForm 4.6, InForm 4.7, or InForm 5.0 study database* (on page 18) or *Back up the InForm 5.5 study database* (on page 19).

## Install the InForm 5.5.2.1 software

**Note:** Before you install the InForm 5.5.2.1 software, make sure your environment meets the requirements for this release. For more information, see the *Release Notes*.

- Install and configure the InForm software, using the Installation Wizard, as described in the *Installation Guide*.

On the Database Configuration page:

- Select the **Install Admin DB** option.
- Set the **Prep Oracle** option.
  - Deselect the **Prep Oracle** option if you plan to install the InForm software on the same machine.
  - Select the **Prep Oracle** option if you plan to install the InForm software on a new machine.

## Create the database user

- Run **DropDB.cmd** (located in the *<Installation\_Directory>\InForm\Bin\DBOra* folder) to create the database user, using following syntax:

```
DropDB.cmd <TNS_Service_Name> <System_User> <System_Password>
<To_Trial_UserID> <To_Trial_UserID_Password>
```

where:

- TNS\_Service\_Name**—TNS name for the database instance.
- System\_User**—Oracle database system user.
- System\_Password**— Password for the Oracle database system user.
- To\_Trial\_UserID**—Owner of the study schema created by the import.
- To\_Trial\_UserID\_Password**—Password for the owner of the study schema created by the import.

For example, the command for the database schema owner PFST46UID is:

```
DropDB.cmd TRIAL1 SYSTEM ORACLE PFST46UID PFST46PID
```

The DropDB command creates the log file **dropdb.err**.

## Grant the database user privileges

- Run **GrantAccess.sql** (located in the *<Installation\_Directory>\InForm\Bin\DBOra* folder) using the following syntax:

```
sqlplus <system_user> /<system_password>@<trial_instance> @GrantAccess.sql
<trial_userid>
```

where:

- trial\_userid**—The name of the database user.

For example:

```
Sqlplus system/oracle@trial1 @GrantAccess.sql PFST46UID
```

## Create tablespaces other than INFORM

Create the tablespaces, other than INFORM, used by the original study, using Oracle tools/commands. The INFORM tablespace exists by default.

For more information on creating the additional tablespaces, see the *Installation Guide*.

## Import the DMP files

**Note:** Before importing the DMP files, see *Oracle 10g database and Oracle 11g database import recommendations* (on page 13).

**Note:** Oracle does not support migrating tables created outside of the standard InForm application schema or by Enterprise Adoption customers. These tables might cause errors when you import the study DMP files.

- Run **ImportDBUpgrade.cmd** (located in the `<InstallationDirectory>\InForm\Bin\DBOra` folder) to import the studies from the study schema DMP files, using the following syntax:

```
ImportDBUpgrade.cmd <DMP_file> <TNS_Service_Name> <System_User>
<System_Password> <From_Trial_UserID> <To_Trial_UserID>
<To_Trial_UserID_Password>
```

where:

- **DMP\_file**—Name of the file containing the study backup.
- **TNS\_Service\_Name**—TNS name for the database instance.
- **System\_User**—Oracle database system user.
- **System\_Password**— Password for the Oracle database system user.
- **From\_Trial\_UserID**—Owner of the database schema being migrated.
- **To\_Trial\_UserID**—Owner of the study schema created by the import.
- **To\_Trial\_UserID\_Password**—Password for the owner of the study schema created by the import.

Example:

```
ImportDBUpgrade.cmd D:\PFST46.dmp TRIAL1 SYSTEM ORACLE PFST46UID PFST46UID
PFST46PID
```

The ImportDBUpgrade command creates a log file `<DMP_file>.log` (for example, pfst46.log).

**Note:** Disregard import errors regarding the database link and the proxy user. These errors only appear if the study that you have exported included the Reporting and Analysis module. In addition, disregard import errors regarding rule triggers. Rule triggers are refreshed during the study schema update.

## Set up the InForm servers, studies, and customer-defined databases

- 1 To define each server, use the following command and syntax:

```
PFADMIN SETUP SERVER <servername>
```

- 2 To define each study, use the following command and syntax:

```
PFADMIN SETUP TRIAL <trialname> <servername> /db <oracle_connect_string>  
<trialUid> <trialPid>
```

where:

- **trialname**—Name of the study you are defining.
  - **servername**—Name of the server on which the study is located.
  - **oracle\_connect\_string**—String that the InForm server uses to connect to the Oracle Instance for the study.
  - **trialUid**—Owner of the study database schema.
  - **trialPid**—Password for the owner of the study database schema.
- 3 To set up the customer-defined databases using the NoSchema option, use the following command and syntax:

```
PFADMIN SETUP CDD <Refname> <trialname> /db <oracle_connect_string> <DSN>  
<trialUid> <trialPid> [NoSchema]
```

where:

- **RefName**—RefName of the CDD.
- **trialname**—Name of the study you are defining.
- **oracle\_connect\_string**—String that the InForm server uses to connect to the Oracle Instance for the study.
- **DSN**—Data Source Name of the CDD.
- **trialUid**—Owner of the study database schema.
- **trialPid**—Password for the owner of the study database schema.
- [**NoSchema**]—Indicates that no new CDD schema should be created during setup.

**Note:** Be sure to use the same RefName, study name, and server name you used for the study before the migration.

## Restore the Central Designer rule engines to the original location

- 1 Copy the DesignerVersion<version number> folder or folders you backed up to the InForm installation directory <InstallationDirectory>/InForm/bin.
- 2 Register the Central Designer rule engine DLL for each DesignerVersion<version\_number> folder that you copied.
  - a Check on your system for the location of the latest copy of RegAsm.exe, version 2.0.50727, typically located at: **C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727**.
  - b For each folder that you restore, execute the following command, all on one command line:

```
C:\Windows\Microsoft.NET\Framework\v2.0.50727\RegAsm.exe /codebase  
<InstallationDirectory>\InForm\bin\DesignerVersion<version  
_number>\PhaseForward.Designer.InFormRuleEngine.dll
```

where:

- **InstallationDirectory**—The directory in which the InForm software is installed.
- **DesignerVersion<version\_number>**—The name of each DesignerVersion folder that you copied from the bin folder.

**Note:** The **/codebase** flag is required. If you run RegAsm without the codebase flag, the rule engine registers, but rules do not run properly in the study. This prevents the enrollment of new subjects and the submission of some forms.

- 3 Restore the files contained in the folder <InstallationDirectory>\InForm\Trials\<trial\_name>.

## Upgrade the study schemas to the InForm 5.5.2.1 release

The UpgradeTrialSchema command upgrades studies from the InForm 4.6 SP2 release and later, all InForm 4.7 releases, and all InForm 5.0 releases to the InForm 5.5.2.1 release. The command terminates if the InForm release is different from these releases.

- Run **UpgradeTrialSchema.cmd** (located in the *<InstallationDirectory>\InForm\Bin\DBOra* folder) on the InForm 5.5 application server to upgrade each study schema to the InForm 5.5.2.1 release, using the following syntax:

```
UpgradeTrialSchema.cmd <TNS_Service_Name> <System_User> <System_Password>
<Trial_UserID> <Trial_UserID_Password>
```

where:

- **TNS\_Service\_Name**—TNS name for the database instance.
- **System\_User**—Oracle database system user.
- **System\_Password**—Password for the Oracle database system user.
- **Trial\_UserID**—Owner of the study database schema.
- **Trial\_UserID\_Password**—Password for the owner of the study database schema.

For example, to upgrade the study schema PFST50UID

```
UpgradeTrialSchema.cmd TRIAL1 SYSTEM ORACLE PFST50UID PFST50PID
```

The UpgradeTrialSchema command creates a log file **Install\_upgrade\_log\_<current-date>\_<current-time>.txt** in the current directory.

## Update the statistics for the InForm studies

- Run **updatec.sql** for each study, using the following command and syntax:

```
SQLPLUS PFDBADMIN/PFDBADMIN@<trial_instance> @updatec.sql <trialuserid>
```

## Start the InForm server

- Start the InForm server for the studies, using the following command:

```
PFADMIN START SERVER <servername>
```

## Create new database objects for the review schema

Before you create the new database objects for the review schema, see *Database and file customizations* (on page 11).

**Note:** The review schema requires about two times the space as the study schema. Be sure to check your disk space and tablespace allocations to ensure adequate resources before you create the review schema tables.

**Note:** The time needed for creating the review schema tables is proportionate to the size of your study. This step can take quite a while.

- Run the **pfadmin RECREATEREVIEWSCHEMA** command using the following syntax to apply any fixes to the review schema and to create new tables for the review schema:

```
pfadmin RECREATEREVIEWSCHEMA <Trial_Name> <StudyLocale_ISO_name>
```

where:

- **Trial\_Name**—Name of the study for which you are creating the review schema.
- **StudyLocale\_ISO\_name**—Name of the InForm Study Locale language.

For InForm 4.6 studies, you must use en-US as the *<StudyLocale\_ISO\_name>*.

For InForm 5.0 studies you can pick any of the supported Study Locales.

The pfadmin RECREATEREVIEWSCHEMA command creates the following log files in the *<InstallationDirectory>\InForm\Bin\DBOra\ReviewSchema* folder:

- Install\_Clinical\_<trialname>\_<currentdate>\_<currenttime>.txt
- Install\_Fixed\_<trialname>\_<currentdate>\_<currenttime>.txt

**Note:** If any schema objects such as views, functions, procedures, packages, or triggers are invalid, pfadmin RECREATEREVIEWSCHEMA fails. You must repair any invalid schema objects before you can rerun pfadmin RECREATEREVIEWSCHEMA.



## Set the MEDMLINSTALLER server

You must set the MEDMLINSTALLER to the current server in order to install the new resources.

The study must be in Design mode before running the commands.

- 1 Start each study in Design mode, using the following command and syntax:

```
PFADMIN START TRIAL <trialname> /DESIGN
```

- 2 Set the MEDMLINSTALLER machine for each study, using the following commands and syntax:

```
PFADMIN SETSERVER MEDMLINSTALLER <trialname> <computername>
```

```
PFADMIN SETSERVER SITE <trialname> <computername>
```

where:

- **computername**—The unqualified name of the host machine.

## Upgrade the study resources

- 1 Run **UpgradeResources.cmd** (located in the <InstallationDirectory>\InForm\Bin\DBOra folder) to upgrade the resources and the XMLBase changes for each study, using the following syntax:

```
UpgradeResources.cmd <trialname> <InForm_version_upgraded_from> [SILENT]
```

where:

- **InForm\_version\_upgraded\_from**—4.6, 4.7, or 5.0.
  - **[SILENT]**—Option that suppresses parameters that are normally supplied interactively with the command.
- 2 During the upgrade process from the InForm 4.6 release or the InForm 4.7 release, you are asked if you want to change the System Config QueryMaxLength parameter to 350 characters.

- Type **Y** and press ENTER to change the value.

If you used the SILENT option when you ran the command, the QueryMaxLength is changed automatically.

The product locale and study locale of the system user are set to en-US if they do not already exist.

## Set the locale for InForm 4.6 sites and users

This step is required only when you migrate InForm 4.6 studies to the InForm 5.5.2.1 release.

InForm 4.7 studies, InForm 5.0 studies, and InForm 5.5 studies have locale attributes associated with sites and users, but InForm 4.6 studies do not. When you migrate studies from the InForm 4.6 release to an InForm 5.5 release, these properties must be added to existing sites and users.

- 1 Run **PFInFormMigrate.cmd** (located in the *<InstallationDirectory>\InForm\Bin* folder) to associate English locale attributes to sites and users, and to create the Upgrade MedML file *UpgradeSitesAndUsers.xml*, using the following syntax:

```
PFInFormMigrate.cmd <TNS_Service_Name> <Trial_UserID>  
<Trial_UserID_Password>
```

where:

- **TNS\_Service\_Name**—TNS name for the database instance.
- **Trial\_UserID**—Owner of the database schema.
- **Trial\_UserID\_Password**—Password for the owner of the database schema.

Example:

```
PFInFormMigrate.cmd TRIAL1 PFST46UID PFST46PID
```

The Upgrade MedML file *UpgradeSitesAndUsers.xml* is created in the *<InstallationDirectory>\InForm\XMLBase* folder.

- 2 Open the **UpgradeSitesAndUsers.xml** file you created in step 1, and check the site MedML definitions for warnings on the TIMEZONE attribute.

If the Time Zone specified for a site in the InForm 4.6 study does not match the time zones defined for the operating system on the InForm application server, the MedML for the given site contains a warning for the TIMEZONE attribute along with the original Time Zone.

- 3 If a warning appears, change the TIMEZONE attribute to a valid Time Zone key name in the InForm server registry before proceeding to the next step.

Time Zones are located at

**HKEY\_LOCAL\_MACHINE\SOFTWARE\Microsoft\Windows  
NT\CurrentVersion\Time Zones** in the registry.

- 4 Ensure the XML file is well formed after the changes.
- 5 Run **UpgradeSitesAndUsers.cmd** (located in the *<InstallationDirectory>\InForm\Bin\DBOra* folder) to install *UpgradeSitesAndUsers.xml*, using the following syntax:

```
UpgradeSitesAndUsers.cmd <TrialName>
```

where:

- **TrialName**—The name of the study being migrated.

For example, run the following command to upgrade sample study PFST46:

```
UpgradeSitesAndUsers.cmd PFST46
```

The *UpgradeSitesAndUsers* command sets the product locale and study locale of all users except the system user to en-US. Similarly, all sites have site locale set to en-US and the User Name Order property set to **F** (given name), **L** (surname).

## Perform the final study configuration

- 1 Finish configuration of the studies related to customer-defined database and randomization.  
For more information, see the *Study and Reporting Setup Guide*.
- 2 Reapply any customizations.  
For more information, see the *Study and Reporting Setup Guide*.

## Restore the Windows registry settings

- 1 Restore the Windows registry settings for  
**HKEY\_LOCAL\_MACHINE\SOFTWARE\Phase Forward\AuthenticationFilter**.
- 2 Restart IIS.

## Install or upgrade the InForm Adapter software

Perform this step if you are currently using, or plan to start using, the InForm application with products that require the InForm Adapter software.

To install or upgrade the InForm Adapter software, refer to the InForm Adapter *Installation and Configuration Guide* and the InForm Adapter *Release Notes*.

For information about release compatibility, see the *Release Notes*.

**Note:** The InForm Adapter software and the InForm Server Adapter software, as well as the documentation images, are available from the Download Center.

## Start the InForm studies

- Start each study, using the following command and syntax:  
**PFADMIN START TRIAL <trialname>**

## Steps to migrate InForm 5.5 studies

To migrate an InForm 5.5 study to the InForm 5.5.2.1 release, perform the following steps:

- 1 *Uninstall the existing version of the InForm software* (on page 32).
- 2 *Install the InForm 5.5.2.1 software* (on page 32).
- 3 *Set up the InForm servers, studies, and customer-defined databases* (on page 33).
- 4 *Restore the Central Designer rule engines to the original location* (on page 34).
- 5 *Upgrade the InForm 5.5 study schemas to the InForm 5.5.2.1 release* (on page 34).
- 6 *Start the InForm server* (on page 35).
- 7 *Create new database objects for the review schema* (on page 35).
- 8 *Upgrade the study resources* (on page 35).
- 9 *Install or upgrade the InForm Adapter software* (on page 36).
- 10 *Start the InForm studies* (on page 36).

## Uninstall the existing version of the InForm software

Before you can install the InForm 5.5.2.1 software on the same machine where you installed a previous version of the InForm software:

- 1 Uninstall the previous version of the InForm software. This step is required.
- 2 Optionally, create a database DMP file of each study database.

**Note:** If you are using Reporting, you must uninstall the Reporting schema before you create the DMP file of the study data. For more information, see *Back up the InForm 4.6, InForm 4.7, or InForm 5.0 study database* (on page 18) or *Back up the InForm 5.5 study database* (on page 19).

## Install the InForm 5.5.2.1 software

**Note:** Before you install the InForm 5.5.2.1 software, make sure your environment meets the requirements for this release. For more information, see the *Release Notes*.

- Install and configure the InForm software, using the Installation Wizard, as described in the *Installation Guide*.

On the Database Configuration page:

- Select the **Install Admin DB** option.
- Set the **Prep Oracle** option.
  - Deselect the **Prep Oracle** option if you plan to install the InForm software on the same machine.
  - Select the **Prep Oracle** option if you plan to install the InForm software on a new machine.

## Set up the InForm servers, studies, and customer-defined databases

- 1 To define each server, use the following command and syntax:

```
PFADMIN SETUP SERVER <servername>
```

- 2 To define each study, use the following command and syntax:

```
PFADMIN SETUP TRIAL <trialname> <servername> /db <oracle_connect_string>  
<trialUid> <trialPid>
```

where:

- **trialname**—Name of the study you are defining.
  - **servername**—Name of the server on which the study is located.
  - **oracle\_connect\_string**—String that the InForm server uses to connect to the Oracle Instance for the study.
  - **trialUid**—Owner of the study database schema.
  - **trialPid**—Password for the owner of the study database schema.
- 3 To set up the customer-defined databases using the NoSchema option, use the following command and syntax:

```
PFADMIN SETUP CDD <Refname> <trialname> /db <oracle_connect_string> <DSN>  
<trialUid> <trialPid> [NoSchema]
```

where:

- **RefName**—RefName of the CDD.
- **trialname**—Name of the study you are defining.
- **oracle\_connect\_string**—String that the InForm server uses to connect to the Oracle Instance for the study.
- **DSN**—Data Source Name of the CDD.
- **trialUid**—Owner of the study database schema.
- **trialPid**—Password for the owner of the study database schema.
- [**NoSchema**]—Indicates that no new CDD schema should be created during setup.

**Note:** Be sure to use the same RefName, study name, and server name you used for the study before the migration.

## Restore the Central Designer rule engines to the original location

- 1 Copy the DesignerVersion<version number> folder or folders you backed up to the InForm installation directory <InstallationDirectory>/InForm/bin.
- 2 Register the Central Designer rule engine DLL for each DesignerVersion<version\_number> folder that you copied.
  - a Check on your system for the location of the latest copy of RegAsm.exe, version 2.0.50727, typically located at: **C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727**.
  - b For each folder that you restore, execute the following command, all on one command line:

```
C:\Windows\Microsoft.NET\Framework\v2.0.50727\RegAsm.exe /codebase
<InstallationDirectory>\InForm\bin\DesignerVersion<version
_number>\PhaseForward.Designer.InFormRuleEngine.dll
```

where:

- **InstallationDirectory**—The directory in which the InForm software is installed.
- **DesignerVersion<version\_number>**—The name of each DesignerVersion folder that you copied from the bin folder.

**Note:** The **/codebase** flag is required. If you run RegAsm without the codebase flag, the rule engine registers, but rules do not run properly in the study. This prevents the enrollment of new subjects and the submission of some forms.

Restore the files contained in the folder <InstallationDirectory>\InForm\Trials\<trial\_name>.

## Upgrade the InForm 5.5 study schemas to the InForm 5.5.2.1 release

The UpgradeTrialSchema command upgrades studies from all InForm 5.5 releases to the InForm 5.5.2.1 release. The command terminates if the InForm release is different from these releases.

- Run **UpgradeTrialSchema.cmd** (located in the <InstallationDirectory>\InForm\Bin\DBOra folder) on the InForm 5.5 application server to upgrade each study schema to the InForm 5.5.2.1 release, using the following syntax:

```
UpgradeTrialSchema.cmd <TNS_Service_Name> <System_User> <System_Password>
<Trial_UserID> <Trial_UserID_Password>
```

where:

- **TNS\_Service\_Name**—TNS name for the database instance.
- **System\_User**—Oracle database system user.
- **System\_Password**— Password for the Oracle database system user.
- **Trial\_UserID**—Owner of the study database schema.
- **Trial\_UserID\_Password**—Password for the owner of the study database schema.

For example, to upgrade the study schema PFST55UID

```
UpgradeTrialSchema.cmd TRIAL1 SYSTEM ORACLE PFST55UID PFST55PID
```

The UpgradeTrialSchema command creates a log file **Install\_upgrade\_log\_<current-date>\_<current-time>.txt** in the current directory.

## Start the InForm server

- Start the InForm server for the studies, using the following command:

```
PFADMIN START SERVER <servername>
```

## Create new database objects for the review schema

Before you create the new database objects for the review schema, see *Database and file customizations* (on page 11).

**Note:** The review schema requires about two times the space as the study schema. Be sure to check your disk space and tablespace allocations to ensure adequate resources before you create the review schema tables.

**Note:** The time needed for creating the review schema tables is proportionate to the size of your study. This step can take quite a while.

- Run the **pfadmin RECREATEREVIEWSCHEMA** command using the following syntax to apply any fixes to the review schema and to create new tables for the review schema:

```
pfadmin RECREATEREVIEWSCHEMA <Trial_Name> <StudyLocale_ISO_name>
```

where:

- Trial\_Name**—Name of the study for which you are creating the review schema.
- StudyLocale\_ISO\_name**—Name of the InForm Study Locale language.

For InForm 5.5 studies you can pick any of the supported Study Locales.

The pfadmin RECREATEREVIEWSCHEMA command creates the following log files in the <InstallationDirectory>\InForm\Bin\DBOra\ReviewSchema folder:

- Install\_Clinical\_<trialname>\_<currentdate>\_<currenttime>.txt
- Install\_Fixed\_<trialname>\_<currentdate>\_<currenttime>.txt

**Note:** If any schema objects such as views, functions, procedures, packages, or triggers are invalid, pfadmin RECREATEREVIEWSCHEMA fails. You must repair any invalid schema objects before you can rerun pfadmin RECREATEREVIEWSCHEMA.

## Upgrade the study resources

- Run **UpgradeResources.cmd** (located in the <InstallationDirectory>\InForm\Bin\DBOra folder) to upgrade the resources and the XMLBase changes for each study, using the following syntax:

```
UpgradeResources.cmd <trialname> <InForm_version_upgraded_from> [SILENT]
```

where:

- InForm\_version\_upgraded\_from**—5.5.
- [SILENT]**—Option that suppresses parameters that are normally supplied interactively with the command.

## Install or upgrade the InForm Adapter software

Perform this step if you are currently using, or plan to start using, the InForm application with products that require the InForm Adapter software.

To install or upgrade the InForm Adapter software, refer to the InForm Adapter *Installation and Configuration Guide* and the InForm Adapter *Release Notes*.

For information about release compatibility, see the *Release Notes*.

**Note:** The InForm Adapter software and the InForm Server Adapter software, as well as the documentation images, are available from the Download Center.

## Start the InForm studies

- Start each study, using the following command and syntax:

```
PFADMIN START TRIAL <trialname>
```



# Steps to migrate InForm 5.5 studies in a new environment

To migrate an InForm 5.5 study to the InForm 5.5.2.1 release on a new machine, perform the following steps:

- 1 *Install the InForm 5.5.2.1 software* (on page 32).
- 2 *Create the database user* (on page 23).
- 3 *Grant the database user privileges* (on page 23).
- 4 *Import the DMP files* (on page 24).
- 5 *Set up the InForm servers, studies, and customer-defined databases* (on page 33).
- 6 *Restore the Central Designer rule engines to the original location* (on page 34).
- 7 *Upgrade the study schemas to the InForm 5.5.2.1 release* (on page 34).
- 8 *Update the statistics for the InForm studies* (on page 27).
- 9 *Start the InForm server* (on page 35).
- 10 *Create new database objects for the review schema* (on page 35).
- 11 *Set the MEDMLINSTALLER machine* (on page 29).
- 12 *Upgrade the study resources* (on page 35).
- 13 *Perform the final study configuration* (on page 31).
- 14 *Install or upgrade the InForm Adapter software* (on page 36).
- 15 *Start the InForm studies* (on page 36).

## Clear the client-side browser caches

### Clear the Internet Explorer 6.0 browser cache

- 1 Select **Tools > Internet Options**.
- 2 Under the **General** tab, select **Temporary Internet Files > Delete Files**.  
A confirmation dialog box appears.
- 3 Select **Delete all offline content**.
- 4 Click **OK**.

### Clear the Internet Explorer 7.0 browser cache

- 1 Select **Tools > Internet Options**.
- 2 In the **Browsing history** section of the **General** tab, click **Delete**.  
The Delete Browsing History dialog box appears.
- 3 Click **Delete Files**.  
A confirmation dialog box appears.
- 4 Click **Yes**.
- 5 Click **Delete Cookies**.  
A confirmation dialog box appears.
- 6 Click **Yes**.
- 7 Click **Close**.
- 8 Click **OK**.

### Clear the Internet Explorer 8.0 or 9.0 browser cache

- 1 Select **Tools > Internet Options**.
- 2 In the **Browsing history** section of the **General** tab, click **Delete**.
- 3 Deselect **Preserve Favorites website data**.
- 4 Select **Temporary Internet Files**.
- 5 Select **Cookies**.
- 6 Click **Delete**.
- 7 Click **OK**.

### Clear the Apple Safari 3.2, 4.5, or 5.0 browser cache

- 1 Select **Safari > Empty cache**.
- 2 Click **Empty**.

## Clear the Firefox 3.5, 3.6, or 4.0 browser cache

- 1 Select **Tools** > **Clear Recent History**.  
The Time range to clear window appears.
- 2 From the drop-down list, select **Everything**.
- 3 In the **Details** list, select **Cache**.
- 4 Click **Clear Now**.



CHAPTER 4

# Upgrading the reporting environment

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## Overview of upgrading the reporting environment

You can upgrade the reporting environment for any InForm 4.6 SP2 studies or later, any InForm 4.7 studies, any InForm 5.0 studies, or any InForm 5.5 studies.

Upgrading the reporting environment is only required if you are using the Reporting and Analysis module.

For more information, see:

- *Steps to upgrade the reporting environment for InForm 4.6 or InForm 5.0 studies* (on page 43).
- *Steps to upgrade the reporting environment for InForm 5.5 studies* (on page 54).

# Steps to upgrade the reporting environment for InForm 4.6, InForm 4.7, or InForm 5.0 studies

Oracle does not support an in-place upgrade for any InForm 4.6, InForm 4.7, or InForm 5.0 release. You must install a new Cognos 8.4 environment, and create, export, and then import your export packages.

To upgrade the reporting environment from any InForm 4.6, InForm 4.7, or InForm 5.0 release, perform the following steps:

- 1 *Install and configure the Cognos 8.4 environment* (on page 44).
  - a *Install and customize the Cognos 8.4 software* (on page 44).
  - b *Identify or create the required users for any InForm study* (on page 45).
- 2 *Create an export package and export the data from your Cognos environment* (on page 45).
  - a Review *About the export package* (on page 45).
  - b *Create an export package for each study in the Cognos environment* (on page 46).
- 3 *Remove the streams between the InForm study schema and the Reporting schema, and uninstall the Reporting schema* (on page 48).

**Note:** You must uninstall the Reporting schema before you create the DMP file of the study data. For more information, see *Back up the InForm 4.6, InForm 4.7, or InForm 5.0 study database* (on page 18).

- 4 *Create the streams between the InForm study schema and the Reporting schema, and install the Reporting schema* (on page 49).
- 5 *Import the data exported from the Cognos environment to the new Cognos 8.4 environment* (on page 50).
- 6 *Run the PFCognosConfig utility* (on page 50).
- 7 *Modify the PFRSetupTrial.xml file* (on page 51).
- 8 *Run PFRInit on the InForm application server* (on page 51).
- 9 *Delete obsolete reports* (on page 51).
- 10 *Associate custom reports with the new operational packages* (on page 52).
- 11 *Revalidate custom reports* (on page 52).
- 12 *Update schedules and jobs* (on page 53).
- 13 *Delete the study organizational units from the LDAP configuration* (on page 53).

## Install and configure the Cognos 8.4 environment

### Install and customize the Cognos 8.4 software

- 1 Install the Cognos 8.4 software on the Cognos servers.

**Note:** For information on how to install and customize the Cognos 8.4 software, see the *Installation Guide*.

- 2 Install Fix Pack 5 (FP5) for the Cognos 8.4 software.
- 3 Install the Cognos hotfix:
  - c8bisrvr\_win32\_8.4.107.1013
- 4 Customize the Cognos 8 Business Intelligence 8.4 software on the Cognos servers.
  - a Run the Cognos 8 Customization for InForm wizard (CRNConfig) on all Report and Content Manager servers.
  - b Run the Cognos 8 Gateway Customization for InForm wizard (CRNGatewayConfig) on all Gateway servers.
  - c Start the Cognos 8 Business Intelligence servers.



## Identify or create the required users for any InForm study

Before you start the Cognos 8.4 upgrade, make sure that the following users exist so that you can log in to the Cognos 8 Business Intelligence server:

- A Cognos user who is a System Administrator.
- An InForm study user who is assigned to a rights group that includes the Reports right and is also a member of the Directory Administrators reporting group.
- An InForm study user (pfreportinguser) who is a member of the Sponsor Users and Publishers reporting group.

The pfreportinguser will be used for the first time by the InForm Model Updater service. The InForm Model Updater service uses the pfreportinguser user name and password to generate the clinical model.

- If necessary, configure the pfreportinguser account.

For more information, see the *Installation Guide*.

- Change the password for the pfreportinguser using both the user interface and the pfadmin command.
  - Log in to the InForm application and change the password for the pfreportinguser using the user interface.
  - Change the password for the pfreportinguser using the following command:

```
PFADMIN SETSERVER PFREPORTINGUSERPW <studyname> <new_password>
```

**Note:** Make sure that the password you enter through the user interface and the command line match.

## Create an export package and export the data from your Cognos environment

### About the export package

You must create reporting export packages for each InForm study being migrated to the InForm 5.5.2.1 release while your current InForm and Cognos environments are still active. The export packages contain:

- A study folder.
- An operational package (InForm Trial Management for <trialname>).
- A clinical package (<trialname> Clinical) from the Cognos Public Folders.

You will import these packages into the Cognos 8.4 environment after you install the InForm 5.5.2.1 software and the Cognos 8.4 software.

Because the current Cognos environment remains intact until the Cognos 8.4 environment is active, there is no need to back up any files on the Cognos server except for the export packages.

## Create an export package for each study in the Cognos environment

For each InForm study, ensure that all users move the content in their **My Folders** area to the study folder in **Public Folders**.

**Note:** Content in the **My Folders** area and individual User Preferences are not migrated during the export and import steps of the Cognos upgrade.

**Note:** In multi-server Cognos environments, the deployment archives are created on the active Content Manager server.

- 1 Log in to an InForm study as a user who has the Reports right and is a member of the Directory Administrators reporting group.
- 2 Click **Reports**.
- 3 Select **Tools** > **Logon** to log in to the Cognos 8 Business Intelligence server as a System Administrator.
- 4 In the **User** field, type the user name for the Cognos System Administrator user (for example, crnsysadmin).
- 5 In the **Password** field, type the password for the Cognos System Administrator user, and click **OK**.
- 6 For Cognos 8.2:
  - Select **Tools** > **Content Administration**.For Cognos 8.4:
  - a Select **Launch** > **Reporting Administration**.
  - b On the Configuration tab, select **Content Administration**.
- 7 Click **New Export**.

The Export wizard appears.
- 8 Enter a name for the export package, and complete the fields on the **Description** page.
- 9 Click **Next**.
- 10 On the **Choose a deployment method** page, ensure that the **Select public folder and directory content** option is selected, and click **Next**.
- 11 On the **Select the public folders content** page, in the Public Folders content section, select the **trial folder**, the **operational package** (InForm Trial Management for <trial\_name>), and the **clinical package** (<trial\_name> Clinical).

- 12 Update the settings on each page for the export deployment package as listed in the following table.

Section	Option	Setting
Public folders content page		
Public folders content section	Disable after import	Selected for the study folder, the operational package, and the clinical package
Options section	Include report output version	Selected
	Include run history	Selected
	Include schedules	Selected
Directory content page		
Directory content	Include Cognos groups and roles	Deselected
	Include distribution lists and connections	Deselected
	Include data sources and connections	Deselected
General options page		
Access permissions	Include access permissions	Deselected
External namespaces	Do not include references to external namespaces	Selected
Entry ownership	Set the owner to	The user performing the import
	Apply to	New entries only

- 13 Click **Next**.
- 14 On the **Specify a deployment archive** page, click **Next**.
- 15 On the **Review the Summary** page, review the export details, and click **Next**.
- 16 On the **Select an action** page, select **Save and Run once**, and click **Finish**.
- 17 On the **Run with options** page, in the **Time** section, select **Now**, and click **Run**.
- 18 On the next page, after closing the dialog box, select **View the details of this export**, and click **OK**.  
The View an export deployment record page appears, and displays the status of the export.
- 19 Click **Close**.

## Remove the streams between the InForm study schema and the Reporting schema, and uninstall the Reporting schema

Perform the following steps for every study on the InForm 4.6, 4.7, or 5.0 application server.

- 1 Run **deinstall\_reporting\_diffdb.sql**.

**Note:** If you are using a single database for your study and reporting, run **deinstall\_reporting\_samedb.sql**.

This script uses the configdiffdb.sql file from the previous installation, so make sure the correct file is in place.

Run this script as many times as necessary, to remove each study.

- a Open a Command Prompt window.
- b Log in to SQL\*Plus with /nolog.
- c At the SQL\*Plus prompt, type the following command:  
**@deinstall\_reporting\_diffdb.sql**
- d After you run the script, check for errors by searching for the word Error in the log file.
- e Correct any problems and run the script again until it does not find anything to remove and does not find any errors.

- 2 Run **remove\_streams\_setup\_info\_diffdb.sql**.

**Note:** If you are using a single database for your study and reporting, this step is not required.

This script removes the references of the study from the Streams\_Setup\_Info table.

- a Open a Command Prompt window.
- b Log in to SQL\*Plus with /nolog.
- c At the SQL\*Plus prompt, type the following command:  
**@remove\_streams\_setup\_info\_diffdb.sql**
- d After you run the script, check for errors by searching for the word Error in the log file.
- e Correct any problems and run the script again until it does not find anything to remove and does not find any errors.

## Create the streams between the InForm study schema and the Reporting schema, and install the Reporting schema

**Note:** You only need to perform this step if your InForm study and the Reporting and Analysis module are installed in different database instances.

- 1 Configure **configdiffdb.sql**.  
For more information, see the *Installation Guide*.
- 2 Re-apply any customizations.
  - a If you customized any files using the **streams\_table\_adds** variable, or by modifying **tabexcludelist.sql** or **tabincludelist.sql**, set the **streams\_table\_adds** variable in **configdiffdb.sql**.  
If these tables already have a prefix of PF\*, CT\*, or RT\*, they will automatically be replicated.
  - b To exclude tables with a prefix of PF\*, CT\*, or RT\* from replication, set the **streams\_table\_exclude** variable in **configdiffdb.sql**.
- 3 Open a Command Prompt window.
- 4 Navigate to the folder in which the Reporting and Analysis software is located (for example, e:\InForm\Bin\DBOra\Reporting).
- 5 Log in to SQL\*Plus with /nolog.
- 6 Run **configandcheckdiffdb.sql**.
- 7 Run **install\_reporting\_diffdb.sql** to install the reporting schema.

## Import the data exported from the Cognos environment to the new Cognos 8.4 environment

Run the ImportUtility command (located in the `<Installation_Directory>\InForm\bin` on the InForm application server) using the following syntax:

```
ImportUtility -all
```

When prompted, enter the:

- Cognos system administrator user namespace.
- User name for the Cognos system administrator.
- Cognos system administrator password.
- Internal URI that the InForm server uses to communicate with the Cognos 8 BI server.

This Cognos 8 BI parameter is set in the InForm CRN wizard. The parameter setting is stored in the `cogstartup.xml` file and corresponds to the Reporting internal URI value on the Admin > System Configuration page of the InForm application.

- Name of the deployment package containing the reporting content you want to import into the Reporting server.
- Password for the deployment package.

**Note:** You can also pass the system administrator namespace, user name, dispatcher URL, and deployment package name in a parameter file. For more information, see ImportUtility.

The ImportUtility command:

- Creates a secure staging folder, accessible to users with system administration privileges.  
The name of the folder is `SecureImport_<timestamp>` where the time stamp format is `yyyymmdd_hhmmss_sss`, where `sss` represents milliseconds (for example `SecureImport_20130920_172055_121`).
- Creates a new import specification object, accessible to users with system administration privileges.
- Imports the content of the deployment package to the `SecureImport_<timestamp>` folder, and makes it accessible only to users with system administration privileges.
- Copies the imported reporting content to the Reporting and Analysis Public folder.
- Deletes the `SecureImport_<timestamp>` folder, any content it contains, and the import specification object.

For more information, see the *Installation Guide*.

## Run the PFCognosConfig utility

Run the PFCognosConfig utility (located in the `<InstallationDirectory>\InForm\bin` folder) on the InForm 5.5.2.1 application server to configure an InForm study to work with the Cognos 8 Business Intelligence application. For more information, see the *Installation Guide*.

## Modify the PFRSetupTrial.xml file

The PFRSetupTrial.xml file is located in the `<InstallationDirectory>\InForm\Bin` folder.

- 1 In the **TrialFolder** section, change the **UserRoot** tag to **ReportsUpgrade**.  
ReportsUpgrade is a tag that triggers the reporting specification upgrade.
- 2 Change the value of the **connectionstring** from *dbconnectionstring* to the Oracle connection string for the Reporting and Analysis database.  
In a single database configuration, use the study database connection string.
- 3 Update the DBUID parameter with the UserID of the study owner.
- 4 Update the DBPWD parameter with the password of the study owner.

**Note:** You must use the most current version of this file, located in the `\InForm\bin` directory for this release. Do not use a backed up version of this file from an earlier release of the InForm software.

## Run PFRInit on the InForm application server

- Run the PFRInit command from the `<InstallationDirectory>\InForm\Bin` folder.  
For more information, see the *Installation Guide*.

The PFRInit command:

- Creates a new operational package called `<studyname> InForm Trial Management` in the Public Folders.  
This package contains any new features.
- Upgrades the specifications of standard reports in the trial folder.  
It upgrades only standard reports that are part of this release.
- Sets permissions on the trial folder and packages for a specific study.  
If the file is not run, the packages and the trial folder are only visible to the System Admin user.

## Delete obsolete reports

If you are migrating from an InForm 4.6 release or an InForm 4.7 release, manually delete the following obsolete reports from the study folder:

- CRF Cycle Time Detail by User
- CRF Site Performance Summary by User
- CRF Aging by User
- CRB Completion and Query Summary by User
- Query Volume by Month by User
- Subject Enrollment Status by User

## Associate custom reports with the new operational packages

If you are migrating from the InForm 4.6 release:

- 1 Manually associate the custom reports developed in the InForm 4.6 application using the **InForm Trial Management for <trialname>** operational package with the new operational package in InForm 5.5 **<studyname> InForm Trial Management**.  
For each report:
  - a Log in to an InForm study as a user who has the Reporting right and is a member of the Directory Administrators reporting group.
  - b Click **Reports**.
  - c Select **Log On > Log On** to log in to the Cognos 8 Business Intelligence 8.4 server as a System Administrator.
  - d In the **User** field, type the user name for the Cognos System Administrator user (for example, crnsysadmin).
  - e In the **Password** field, type the password for the Cognos System Administrator user, and click **OK**.
  - f Select **Actions > Set Properties**.
  - g In the **General** tab, click **Link to a Package**, and select the new **<studyname> InForm Trial Management** package.
  - h Click **OK**.
- 2 Delete the **InForm Trial Management for <studyname>** operational packages from the InForm 4.6 application.

## Revalidate custom reports

- 1 Revalidate the custom reports and, if necessary, modify the reports for the new operational packages.  
You revalidate the custom reports by running them and comparing the output to the expected output based on the previous release.
- 2 Stop and start the **InForm Model Updater** service to force the immediate clinical model generation.
- 3 Revalidate all the custom clinical or ad hoc reports for the new clinical model in order to access all the enhancements in this release.
  - If you have access to Report Studio, open the custom clinical report in Report Studio, validate, and save the report.
  - If you do not have access to Report Studio, in the Cognos connection:
    - a Navigate to **Set Properties** for a report, and click **Link to a package**.
    - b Select the **<trial name> clinical package**, and click **OK**.
- 4 Run all the custom clinical reports, and compare the output to the expected output based on the previous release.



## Update schedules and jobs

Any user who has scheduled reports must log in to the Reporting and Analysis module and make the necessary changes to the job schedules.

- 1 Select **Launch > Reporting Administration**.
- 2 In the **Status tab**, click **Schedules**.
- 3 Modify and save each listed schedule and job.
  - a Click the drop-down list next to the schedule name.
  - b Click **Modify the Schedule**.
  - c Make any modification (such as changing the start time by one minute), and click **OK**.
- 4 Ensure that study users copy their My Folders content from Public Folder to My Folders.

## Delete the study organizational units from the LDAP configuration

LDAP is not used to authenticate study users in the InForm 5.5.2.1 release.

- Manually delete the study organizational units (OUs) from the LDAP Directory server through the LDAP Configuration and Administration interface.

## Steps to upgrade the reporting environment for InForm 5.5 studies

Oracle does not support an in-place upgrade for any InForm 5.5 release. You must install a new Cognos 8.4 environment, and create, export, and then import your export packages.

To upgrade the reporting environment from any InForm 5.5 release to the InForm 5.5.2.1 release to a new Cognos environment, perform the following steps:

- 1 *Install and configure the Cognos 8.4 environment* (on page 44).
  - a *Install and customize the Cognos 8.4 software* (on page 44).
  - b *Identify or create the required users for any InForm study* (on page 45).
- 2 *Create an export package and export the data from your Cognos environment* (on page 45).
  - a Review *About the export package* (on page 45).
  - b *Create an export package for each study in the Cognos environment* (on page 46).
- 3 *Create the streams between the InForm study schema and the Reporting schema, and install the Reporting schema* (on page 49).

**Note:** You only need to perform this step if your InForm study and the Reporting and Analysis module are installed in different database instances.

- 4 *Import the data exported from the Cognos environment to the new Cognos 8.4 environment* (on page 50).
- 5 *Run the PFCognosConfig utility* (on page 50).
- 6 *Modify the PFRSetupTrial.xml file* (on page 51).
- 7 *Run PFRInit on the InForm application server* (on page 51).
- 8 *Revalidate custom reports* (on page 52).
- 9 *Update schedules and jobs* (on page 53).

CHAPTER 5

Migrating the InForm Portal software

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## Overview of migrating the InForm Portal software

Upgrading or migrating the InForm Portal software for the InForm 5.5.2.1 release is only required if you are using the InForm Portal software.

# Steps to prepare to migrate the InForm Portal software

To prepare the InForm Portal software to migrate to the InForm 5.5.2.1 release, perform the following steps:

- 1 *Prepare the InForm Portal 4.6 database schema for backup* (on page 57).
- 2 Back up the InForm Portal database and customized files.
  - *Back up the InForm Portal 4.6, 4.7, or 5.0 database and customized files* (on page 58).
  - *Back up the InForm Portal 5.5 database and customized files* (on page 59).

## Prepare the InForm Portal 4.6 database schema for backup

If you are migrating an InForm 4.6 study, you must prepare the InForm Portal 4.6 database schema for backup before migrating to the InForm 5.5 release.

**Note:** Character set differences between the InForm 4.6 release and the InForm 5.5 releases might cause issues with table column widths. Perform this step to prevent these issues.

- 1 Copy the InForm\InstallSupport folder from the downloaded ISO image to the InForm 4.6 application server.
- 2 Run **UpgradeTrialSchema.cmd** (located in the InForm\InstallSupport folder) on the InForm 4.6 application server to prepare the InForm 4.6 study schemas for backup, using the following syntax:

```
UpgradeTrialSchema.cmd <TNS_Service_Name> <System_User> <System_Password>
                        <Portal_UserID> <Portal_User_Password>
```

where:

- **TNS\_Service\_Name**—TNS name for the database instance.
- **System\_User**—Oracle database system user.
- **System\_Password**— Password for the Oracle database system user.
- **Portal\_UserID**—Owner of the InForm Portal database schema.
- **Portal\_User\_Password**—Password for the owner of the InForm Portal database schema.

The UpgradeTrialSchema command creates the log file **Install\_upgrade\_log\_<current-date>\_<current-time>.txt** in the current directory.

**Note:** If error messages indicating that the system cannot find the paths specified for the System Product Locale and the System Study Locale appear, disregard the messages and continue with the migration.

## Back up the InForm Portal database and customized files

### Back up the InForm Portal 4.6, 4.7, or 5.0 database and customized files

- 1 Copy the InForm\InstallSupport folder from the downloaded ISO image to the InForm application server.
- 2 Run **ExportDBUpgrade.cmd** (located in the InForm\InstallSupport folder) on the InForm application server to back up the InForm Portal database as a DMP file, using the following syntax:

```
ExportDBUpgrade.cmd <DMP_file> <TNS_Service_Name> <Portal_UserID>  
                    <Portal_User_Password>
```

where:

- **DMP\_file**—Name of the DMP file, using the full path.

**Note:** Do not include spaces in the DMP file name.

- **TNS\_Service\_Name**—TNS name for the database instance.
- **Portal\_UserID**—Owner of the InForm Portal database schema.
- **Portal\_User\_Password**—Password for the owner of the InForm Portal database schema.

Example:

```
ExportDBUpgrade.cmd D:\PortalDB.dmp TRIAL1 Portal46UID Portal46PID
```

The ExportDBUpgrade command creates the log file **<DMP\_file>.log** in the current directory.

- 3 Back up any InForm Portal files that you customized.

## Back up the InForm Portal 5.5 database and customized files

- 1 Copy the InForm\InstallSupport folder from the downloaded ISO image to the InForm database server.
- 2 Run **ExportDB.cmd** (located in the InForm\InstallSupport folder) on the InForm database server to back up the InForm Portal database as a DMP file, using the following syntax:

```
ExportDB.cmd <TNS_Service_Name> <Physical_Directory_Path> <DMP_File_Name>
<System_User> <System_User_Password> <Study_User> <Study_User_Password>
<Target_Database_Version>
```

where:

- **TNS\_Service\_Name**—TNS name for the database instance.
- **Physical\_Directory\_Path**—Location of the directory that you created on the InForm database server for the data pump.
- **DMP\_File\_Name**—Name of the DMP file to export.

**Note:** Do not include spaces in the DMP file name.

- **System\_User**—Oracle database system user.
- **System\_Password**—Password for the Oracle database system user.
- **Study\_User**—Owner of the system database.
- **Study\_User\_Password**—Password for the owner of the system database.
- **Target\_Database\_Version**—Version of the database where the DMP file will be exported. This is required if the target database is an older version than the database exporting the DMP file.

For example:

```
ExportDB.cmd trial11 /u01/app/oracle/dp_export pfst46.dmp system oracle
pfst46uid pfst46pid
```

The ExportDB command creates the log file **<DMP\_File>.log**.

- 3 Back up any InForm Portal files that you customized.

## Steps to migrate the InForm Portal software

To migrate the InForm Portal software to the InForm 5.5.2.1 release, perform the following steps:

- 1 *Migrate the InForm Portal software in the same database instance* (on page 60).  
or  
*Migrate the InForm Portal software to a new database instance* (on page 61).
- 2 *Reset the InForm Portal Home page* (on page 64).

### Migrate the InForm Portal software in the same database instance

- 1 Uninstall the previous version of the InForm Portal software.
  - a Manually remove the InForm Portal DSN entries.
  - b Manually remove the InForm Portal virtual directories.
- 2 If you are migrating from any InForm 4.6, InForm 4.7, or InForm 5.0 release, run **Upgrade40toMLInFormPortal.cmd** (located in the `<InstallationDirectory>\InForm\InFormPortal\Scripts\InstallSupport` folder) for each Portal schema, using the following syntax:

```
Upgrade40toMLInFormPortal.cmd <Trial_Name> <TNS_Service_Name>  
<Portal_User_ID> <Portal_UserID_Password>
```

where:

- **Trial\_Name**—Name of the study being migrated.
- **TNS\_Service\_Name**—TNS name for the database instance.
- **Portal\_UserID**—Owner of the Portal database schema created for import.
- **Portal\_UserID\_Password**—Password for the owner of the InForm Portal database schema created for import

Example:

```
Upgrade40toMLInFormPortal.cmd PFST46 TRIAL1 PORTAL46UID PORTAL46PID
```

- 3 Run the Portal Configuration Tool.

Be sure to *deselect* the **Create Portal DB Schema** option, otherwise the Portal Configuration Tool drops the imported database and creates a new one. For more information, see the *Portal Administration Guide*.
- 4 Open a Command Prompt window.
- 5 Connect to the Oracle database by typing the following command:

```
sqlplus <portal_user_id>/<portal_user_password>@<TNS_Service_Name>
```

Example:

```
sqlplus pfst55portaluid/pfst55portalpid@Trial1
```



- 6 Update the database using the following command:

```
update PF_CONFIG set DSN = '<TNS_Service_Name>;'
```

Example:

```
update PF_CONFIG set DSN = 'Trial1';
```

- 7 Enter the following command:

```
commit;
```

- 8 Exit sqlplus by typing the following command:

```
exit
```

- 9 Reset the InForm Portal Home page, if required.

For more information, see *Reset the InForm Portal Home page* (on page 64).

## Migrate the InForm Portal software to a new database instance

- 1 Uninstall the previous version of the InForm Portal software.
  - a Manually remove the InForm Portal DSN entries.
  - b Manually remove the InForm Portal virtual directories.
- 2 Run **DropDB.cmd** (located in the <InstallationDirectory>\InForm\Bin\DBOra folder) to create a database user, using the following syntax:

```
DropDB.cmd <TNS_Service_Name> <System_User> <System_User_Password>  
<To_Portal_UserID> <To_Portal_User_Password>
```

where:

- **TNS\_Service\_Name**—TNS name for the database instance.
- **System\_User**—Oracle System User.
- **System\_User\_Password**—Oracle System User Password.
- **To\_Portal\_UserID**—Owner of the InForm Portal database schema created by the import.
- **To\_Portal\_User\_Password**—Password for the owner of the InForm Portal database schema created by the import.

Example:

```
DropDB.cmd TRIAL1 PFADMIN PFADMIN PORTAL46UID PORTAL46PID
```

The DropDB command creates the log file **dropdb.err**.

- 3 Import the InForm Portal 4.6, 4.7, or 5.0 database schema, and then proceed to step 5.

**Note:** To import an InForm Portal 5.5 database schema, proceed to step 4.

Run **ImportDBUpgrade.cmd** (located in the <InstallationDirectory>\InForm\Bin\DBOra folder) to import the InForm Portal database schema, using the following syntax:

```
ImportDBUpgrade.cmd <DMP_file> <TNS_Service_Name> <System_User>
<System_User_Password> <From_Portal_UserID> <To_Portal_UserID>
```

where:

- **DMP\_file**—Name of the DMP file, using the full path.
- **TNS\_Service\_Name**—TNS name for the database instance.
- **System\_User**—Oracle System User.
- **System\_User\_Password**—Oracle System User Password.
- **From\_Portal\_UserID**—Owner of the portal database schema being migrated.
- **To\_Portal\_UserID**—Owner of the Portal database schema created for the import.

Example:

```
ImportDBUpgrade.cmd D:\PORTAL46.dmp TRIAL1 PFADMIN PFADMIN PORTAL46UID
PORTAL46UID
```

The ImportDBUpgrade command creates the log file <DMP\_file>.log. For the previous example, the log file is **portal46.log**.

- 4 Import the InForm Portal 5.5 database schema, and then proceed to step 6.

Run **ImportDB.cmd** (located in the <InstallationDirectory>\InForm\Bin\DBOra folder) to import the InForm Portal database schema, using the following syntax:

```
ImportDB.cmd <TNS_Service_Name> <Physical_Directory_Path> <DMP_File_Name>
<System_User> <System_User_Password> <From_User> <To_User>
<To_User_Password>
```

where:

- **TNS\_Service\_Name**—TNS name for the database instance.
- **Physical\_Directory\_Path**—Location of the directory that you created on the InForm database server for the data pump.
- **DMP\_File\_Name**—Name of the DMP file to import.
- **System\_User**—Oracle database system user.
- **System\_Password**—Password for the Oracle database system user.
- **From\_User**—Owner of the system database.
- **To\_User**—Owner of the study schema created by the import.
- **To\_User\_Password**—Password for the owner of the study schema created by the import.

For example:

```
ImportDB.cmd trial1 /u01/app/oracle/dp_export pfst46.dmp system oracle
pfst46uid pfst46uid pfst46pid
```

The ImportDB command creates the log file **<DMP\_file>.log**.

- 5 If you are migrating from any InForm 4.6, InForm 4.7, or InForm 5.0 release, run **Upgrade40toMLInFormPortal.cmd**, (located in the *<InstallationDirectory>\InForm\InFormPortal\Scripts\InstallSupport* folder), using the following syntax:

```
Upgrade40toMLInFormPortal.cmd <Trial_Name> <TNS_Service_Name>
<Portal_User_ID> <Portal_UserID_Password>
```

where:

- **Trial\_Name**—Name of the study being migrated.
- **TNS\_Service\_Name**—TNS name for the database instance.
- **Portal\_UserID**—Owner of the Portal database schema created for the import.
- **Portal\_UserID\_Password**—Password for the owner of the Portal database schema created for the import.

Example:

```
Upgrade40toMLInFormPortal.cmd PFST46 TRIAL1 PORTAL46UID PORTAL46PID
```

- 6 Run the Portal Configuration Tool.

Be sure to *deselect* the **Create Portal DB Schema** option, otherwise the Portal Configuration Tool drops the imported database and creates a new one. For more information, see the *Portal Administration Guide*.

- 7 Open a Command Prompt window.
- 8 Connect to the Oracle database by typing the following command:

```
sqlplus <portal_user_id>/<portal_user_password>@<TNS_Service_Name>
```

Example:

```
sqlplus pfst55portaluid/pfst55portalpid@Trial1
```

- 9 Update the database using the following command:

```
update PF_CONFIG set DSN = '<TNS_Service_Name>';
```

Example:

```
update PF_CONFIG set DSN = 'Trial1';
```

- 10 Enter the following command:

```
commit;
```

- 11 Exit sqlplus by typing the following command:

```
exit
```

- 12 Reset the InForm Portal Home page, if required.

For more information, see ***Reset the InForm Portal Home page*** (on page 64).

## Reset the InForm Portal Home page

If the InForm Portal Home page URL has changed as part of the upgrade, reset the home URL for each user.

- 1 Log in to the InForm application as an administrator who can modify user settings.
- 2 Update the Home page for each InForm Portal user to **./portal/default.htm**.

CHAPTER 6

Database and file changes

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## Database schema changes

### Changes to the database schema from the InForm 4.6 software to the InForm 4.7 software

The following table lists the database objects that changed from the InForm 4.6 SP2 software to the InForm 4.7 SP0 software.

Database Table	Changes
INF_MSGEDIT_HISTORY	TRANSACTIONCONTENT – LONG to CLOB
PF_COMMENT	COMMENTTEXT – LONG to CLOB
PF_CONTROLDATA	BLOBVALUE – LONG RAW to CLOB. Data is converted from character set <b>AMERICAN_AMERICA.WE8ISO8859P1</b> to character set <b>AMERICAN_AMERICA.AL32UTF8</b> to support migration of LATIN 1 characters.
PF_CRFSPATIENTFORM	XMLDATA – LONG RAW to BLOB
PF_EXECUTIONPLAN	EPSCRIPT – LONG to CLOB
PF_EXECUTIONPLANQUEUE	CONTEXTDATA – LONG RAW to BLOB
PF_GROUP	GROUPNAME – Length to 1000
PF_ITEMDATA	ENTEREDREASON – Length from 255 to 1000
PF_LANGUAGE	1 <b>CORE</b> – New Column – Number 2 <b>STUDY</b> – New Column – Number
PF_PATCH	Removed.
PF_PATH	1 PATHSTRING – Length from 255 to 510 2 REFNAME – Length from 255 to 510 3 TYPE – Length from 32 to 64
PF_PATIENT	1 INITIALS – CHAR(3 BYTE) to VARCHAR2(3 CHAR) 2 SCREENINGFAILURE – 255 to 1000 3 ENROLLMENTFAILURE – 255 to 1000 4 ENROLLMENTOVERRIDE – 255 to 1000
PF_PATIENT_CUR	1 INITIALS – CHAR(3 BYTE) to VARCHAR2(3 CHAR) 2 SCREENINGFAILURE – 255 to 1000 3 ENROLLMENTFAILURE – 255 to 1000 4 ENROLLMENTOVERRIDE – 255 to 1000
PF_RESOURCEDATA	RESOURCEDATA – LONG RAW to BLOB

Database Table	Changes
PF_REVISIONHISTORY	REASON – Length from 255 to 500
PF_RIGHTS	RIGHTDESCRIPTION – Length from 63 to 126 bytes
PF_RULES	<ol style="list-style-type: none"> <li>1 RULEDESCRIPTION – Length from 126 to 512 bytes</li> <li>2 RULESCRIPT – LONG to CLOB</li> </ol>
PF_SITE	<ol style="list-style-type: none"> <li>1 SITENAME – Length from 255 to 1000</li> <li>2 SITEMNEMONIC – Length from 32 to 64</li> <li>3 EMAILADDRESS – Length from 256 to 1000</li> </ol>
PF_SITE_CUR	<ol style="list-style-type: none"> <li>1 SITENAME – Length from 255 to 1000</li> <li>2 SITEMNEMONIC – Length from 32 to 64</li> <li>3 EMAILADDRESS – Length from 256 to 1000</li> </ol>
PF_SYNCLOG	SYNCLOG – LONG RAW to BLOB
PF_USER	<ol style="list-style-type: none"> <li>1 FIRSTNAME – Length to 510</li> <li>2 LASTNAME – Length to 510</li> <li>3 EMAILADDRESS – Length to 1000</li> <li>4 COUNTRY – New Column – Varchar2(510)</li> </ol>
PF_USERPROFILE	<ol style="list-style-type: none"> <li>1 LANGUAGEID – New Column Number</li> <li>2 DISPLAYNAME – New Column Varchar2(255)</li> </ol>

## Changes to the database schema from the InForm 4.7 software to the InForm 5.0 software

The following table lists the database objects that changed from the InForm 4.7 SP0 software to the InForm 5.0 SP0 software.

Database Table	Change
PF_TextControl	Added CHARSET - New Column Number

## Changes to the database schema from the InForm 5.0 software to the InForm 5.5 software

The following table lists the database objects that changed from the InForm 5.0 SP0 software to the InForm 5.5 SP0 software.

Database Table	Column	Column Type
PF_REVISIONHISTORY	REVIEWSCHEMAUPDATED – New Date Column	
PF_SVSUBJECTPOOL (new table)	SVSUBJECTPOOLID	NUMBER NOT NULL
	SVSUBJECTPOOLREVISIONNUMBER	FLOAT NOT NULL
	PATIENTID	NUMBER NOT NULL
	SITEID	NUMBER NOT NULL
	POOLNUM	NUMBER NOT NULL
PF_SVSUBJECTPOOL_CUR (new table)	SVSUBJECTPOOLID	NUMBER NOT NULL
	SVSUBJECTPOOLREVISIONNUMBER	FLOAT NOT NULL
	PATIENTID	NUMBER NOT NULL
	SITEID	NUMBER NOT NULL
	POOLNUM	NUMBER NOT NULL
PF_SVCriticalForms (new table)	SVCriticalFORMSID	NUMBER NOT NULL
	SVCriticalFORMSREVISIONNUMBER	FLOAT NOT NULL
	PAGEID	NUMBER NOT NULL
	SITEID	NUMBER NOT NULL
	ISCRITICAL	NUMBER NOT NULL
PF_SVCriticalForms_CUR (new table)	SVCriticalFORMSID	NUMBER NOT NULL
	SVCriticalFORMSREVISIONNUMBER	FLOAT NOT NULL
	PAGEID	NUMBER NOT NULL
	SITEID	NUMBER NOT NULL
	ISCRITICAL	NUMBER NOT NULL



## Changes to the database schema from the InForm 5.5.1 software to the InForm 5.5.2.1 software

The following table lists the database objects that changed from the InForm 5.5.1 software to the InForm 5.5.2.1 software.

Table	Column	Change
PF_SESSION	SESSIONKEY	Length from Varchar2(32) to Varchar2(46 CHAR)

## Data changes

### Data changes from the InForm 4.6 software to the InForm 4.7 software

The following table lists the data changes from the InForm 4.6 SP2 software to the InForm 4.7 SP0 software.

Table	Changes
PF_INFORM	Update DBVersion to <b>InForm 4.7</b> .
PF_DBUID	Update GUID to <b>English (United States)</b> where DBUID is 2.
PF_LANGUAGE	<ol style="list-style-type: none"> <li>1 Change LanguageName to <b>en-US</b> from English.</li> <li>2 Set CORE to 1 where Language is <b>en-US</b>.</li> <li>3 Set STUDY to 0 where Language is <b>en-US</b>.</li> <li>4 Add Japanese language <b>ja-JP</b>.</li> </ol>
PF_DBUID	Add Japanese Language ID.
PF_ENTITYMAPPING	Add Japanese Language LCID.
PF_USERPROFILE	Add DisplayName entries <b>Not Complete</b> , <b>Not Verified</b> , and <b>Ready to Verify</b> for English and Japanese languages.

### Data changes from the InForm 4.7 software to the InForm 5.0 software

None.

## Data changes from the InForm 5.0 software to the InForm 5.5 software

The following table lists the data changes from the InForm 5.0 SP0 software to the InForm 5.5 SP0 software.

**Note:** There are no data changes from the InForm 5.5 SP0 software to the InForm 5.5.2.1 software.

Table	Changes
PF_INFORM	Update DBVersion to <b>InForm 5.5</b> .
PF_TABLES	<p>The following new values were added:</p> <ol style="list-style-type: none"> <li>1 PF_CHAPTER_CUR</li> <li>2 PF_IM_CHAPTER</li> <li>3 PF_IM_CHAPTER_CUR</li> <li>4 PF_IM_PAGE</li> <li>5 PF_PATIENTNUMEBR_CUR</li> <li>6 PF_PATIENT_CUR</li> <li>7 PF_QUERY_LISTING</li> <li>8 PF_RESOURCEDATA_CUR</li> <li>9 PF_SITEVOLUMEEDITION_CUR</li> <li>10 PF_SITE_CUR</li> <li>11 PF_SUBJECTVECHAPTER_CUR</li> <li>12 PF_USERPROFILE</li> </ol>

## MedML schema changes

### MedML schema changes from the InForm 4.6 software to the InForm 4.7 software

The following table lists the MedML database schema objects that changed from the InForm 4.6 SP2 software to the InForm 4.7 SP0 software.

Category	Changes
New attributes	1 TypeNonEmptyString
	2 TypeTranslatableAttribute
	3 TypeDATASOURCE
New elements	1 TRANSLATION
	2 TRANSLATIONS
Changed attribute	TypeLanguage
Elements changed to have optional TRANSLATIONS element	1 DOCUMENTATION
	2 DOCBODY
	3 CALCLATEDCONTROL
	4 ITEM
	5 SECTION
	6 UNIT
	7 PFELEMENT
	8 SIMPLECONTROL
	9 TEXTCONTROL
	10 RADIOCONTROL
	11 DATETIMECONTROL
	12 FORM
	13 PULLDOWNCONTROL
	14 CHECKBOXCONTROL
	15 LISTBOXCONTROL
	16 GROUPCONTROL
	17 FORMSET
	18 SIGNATUREGROUP

Category	Changes
Changed elements	<ol style="list-style-type: none"> <li>1 USER: New required attributes PRODUCTLOCALE and STUDYLOCALE.</li> <li>2 SYSCONFIG: TYPE is now an optional attribute.</li> <li>3 SITE: New optional attributes STUDYLOCALE and USERNAMEORDER.</li> <li>4 SIGNATUREGROUP: New optional attribute UPDATE.</li> </ol>

## MedML schema changes from the InForm 4.7 software to the InForm 5.0 software

The following table lists the MedML database schema objects that changed from the InForm 4.7 SP0 software to the InForm 5.0 SP0 software.

Element	Changes
TEXTCONTROL MedML	Added CHARSET

## MedML schema changes from the InForm 5.0 software to the InForm 5.5 software

The following table lists the MedML database schema objects that changed from the InForm 5.0 SP0 software to the InForm 5.5 SP0 software.

**Note:** There are no MedML schema changes from the InForm 5.5 SP0 software to the InForm 5.5.2.1 software.

Category	Changes
Changed element: SITE	<ol style="list-style-type: none"> <li>1 New optional attribute UPDATE to support updating existing site objects.</li> <li>2 New optional attribute SVAUTOSELECTRATE to support the Partial SV feature.</li> <li>3 New optional SVFIRSTNSUBJECTS to support Partial SV.</li> <li>4 Attribute NAME changed to REQUIRED from OPTIONAL.</li> </ol>

## Base MedML changes

### Base MedML changes from the InForm 4.6 software to the InForm 4.7 software

The following table lists the Base MedML that changed from the InForm 4.6 SP2 software to the InForm 4.7 SP0 software. All files are located in the folder *<InstallationDirectory>\InForm\XMLBase*.

File	Description	Change
Core_Date.xml	Core Date Formats.	1 Added visit formats for Visit Calc, Year suffix, and Month suffix. 2 Added Date Formats for Japanese.
Core_doc.xml	DOCUMENTATION objects.	Added translations for DOCNAME and HELPTTEXT attributes.
Core_grouptypes.xml	THINGTYPE properties.	Added properties for SiteStudyLocale and SiteUserNameOrder.
Core_Patch.xml	Patch things.	Removed from XMLBase
Core_PatchAdmin.xml	Patch Admin settings.	Removed from XMLBase
Core_Randomization.xml	Randomization section.	Added translation to objects.
Core_RightsGroups.xml	RightsGroups.	Removed rights <b>Manage Software Patch</b> and <b>View Software Patch Status</b> rights from <b>SysAdmin Rights Group</b> RightsGroup.
Core_systemConfig.xml	System config data.	Removed value for <b>NumCharsCRFLength</b> . Added value for <b>USERNAMEORDER</b> . <b>Note:</b> Installing this file into an existing study changes the existing system configuration settings.
Core_SystemConfigThing.xml	THINGTYPE properties.	Added properties <b>UserProductLocale</b> and <b>UserStudyLocale</b> .
Core_ValuesMetaData.xml	DOV section.	Added translation to objects.
Sysform_AdminDBSvr.xml	AdminDB server context form.	Added translation to objects.
Sysform_AdminDBTrl.xml	AdminDB study context form.	Added translation to objects.
Sysform_AdminUserNew.xml	User Admin form.	Added translation to objects.

File	Description	Change
Sysform_AdvancedConnectionSettings.xml	Advanced Connection Settings.	Added translation to objects.
Sysform_AssignUserToGroup.xml	User group edit form.	Added translation to objects.
Sysform_ClearCRF.xml	Clear CRF form.	Added translation to objects.
Sysform_Comment.xml	Comment form.	Added translation to objects.
Sysform_Conflict.xml	Conflict resolution.	Added translation to objects.
Sysform_ConnectionSettings.xml	Connection settings.	Added translation to objects.
Sysform_DefaultAdvancedConnectionSettings.xml	Default Advanced settings.	Added translation to objects.
Sysform_DefaultConnectionSettings.xml	Sync Default settings.	Added translation to objects.
Sysform_DictType.xml	Dictionary properties form.	Added translation to objects.
Sysform_EditItem.xml	Edit Item form.	Added translation to objects.
Sysform_EventAdd.xml	Add event form.	Added translation to objects.
Sysform_FAQ.xml	FAQ form.	Added translation to objects.
Sysform_Group.xml	Add group form.	Added translation to objects. The file is obsolete.
Sysform_GroupAddProp.xml	Add group properties.	Added translation to objects.
Sysform_GroupEditProp.xml	Edit group properties.	Added translation to objects.
Sysform_GroupSelect.xml	User group association.	Added translation to objects.
Sysform_GroupSelect.xml	User group association.	Added translation to objects.
Sysform_GroupType.xml	Reporting group form.	Added translation to objects.
Sysform_ItemEditReasons.xml	Edit item reason.	Added translation to objects.
Sysform_Listings.xml	Internal listings form.	Added translation to objects.
Sysform_Password.xml	Password entry form.	Added translation to objects.
Sysform_Patch.xml	Patch form.	Removed.
Sysform_PatchAdminThings.xml	Patch form.	Removed.
Sysform_PatchForms.xml	Patch form.	Removed.
Sysform_PatientSiteChange.xml	Patient site change form.	Added translation to objects.
Sysform_Query.xml	Query form.	Added translation to objects.
Sysform_Query2.xml	Query form.	Added translation to objects.

File	Description	Change
Sysform_RightsEdit.xml	Right edit form.	Added translation to objects.
Sysform_Rule.xml	Rule edit form.	Added translation to objects.
Sysform_RuleItemEdit.xml	Rule item edit form.	Added translation to objects.
Sysform_Site.xml	Site edit form.	Added translation to objects.
Sysform_synchronization.xml	Sync file transfer.	Added translation to objects.
Sysform_SystemConfig.xml	System Configuration.	Added translation to objects.
Sysform_SystemInfo.xml	System Info.	Added translation to objects.
Sysform_UserPswrd.xml	User Password form.	Added translation to objects.
Sysform_UserType.xml	User Information form.	Added translation to objects.
sysVolume.xml	Version Information.	Changed version.
sysVolumeAdmin.xml	System forms.	Added translation to objects.
QueryFormText.xml	Query form.	New file.

## Base MedML changes from the InForm 4.7 software to the InForm 5.0 software

The following table lists the Base MedML that changed from the InForm 4.7 SP0 software to the InForm 5.0 SP0 software. All files are located in the folder <InstallationDirectory>\InForm\XMLBase.

File	Description	Change
sysform_SystemConfig.xml	System Configuration Form	<ol style="list-style-type: none"> <li>Added a read-only display indicating if forms display traffic light icons.</li> <li>Increased the E-mail address string max size to 255 characters.</li> </ol>
core_SystemConfig.xml	Default values for system configuration parameters.	<ol style="list-style-type: none"> <li>Changed QueryMaxLength from 80 to 350 characters.</li> <li>Added DISPLAYTRAFFICLIGHTS and set the default to false (0).</li> </ol> <p><b>Note:</b> Installing this file into an existing study changes the existing system configuration settings.</p>



File	Description	Change
core_SystemConfigThing.xml	Thing types, part of Thing World: The InForm application's means of categorizing and storing property values.	Added the <b>DISPLAYTRAFFICLIGHTS</b> thing type.
core_GroupTypeStrings.xml	Translations for thing type descriptions.	New file.
sysVolumeAdmin.xml	System Forms	Added LANGUAGE="en-US"
sysform_SystemInfo.xml	Copyright info	Change year from 2008 to 2009 in copy rights
sysform_Site.xml	Site details page	Updated <b>patient</b> to <b>subject</b> .
sysform_RightsEdit.xml	Rights Group details page	Updated <b>patient</b> to <b>subject</b> .
sysform_Password.xml	Update user password page.	Updated translations.
sysform_PatientSiteChange.xml	Patient Site Change page.	<b>Patient</b> changed to <b>Subject</b> .
core_Date.xml	Date and Time formats	Date and Time separators
XmlBaseEnd.xml	End Of Base XML	New file.

## Base MedML changes from the InForm 5.0 software to the InForm 5.5 software

The following table lists the Base MedML that changed from the InForm 5.0 SP0 software to the InForm 5.5 SP0 software. All files are located in the folder <InstallationDirectory>\InForm\XMLBase.

File	Description	Changes
Core_Rights.xml	Rights	<p>Added the <b>Assign Review States</b> and <b>View Review States</b> rights, which provide access to the custom review states in the Data Viewer.</p> <p>Added the <b>Change SV Site Settings</b> right, which allows access to the Partial SV configuration options.</p>
Core_RightsGroups.xml	Rights Groups	Changed rights groups <b>System Creator Group</b> and <b>InForm Server Group</b> .
Core_SystemConfig.xml	System config values	<ol style="list-style-type: none"> <li>Added value for <b>Authentication Component</b>.</li> <li>Changed value for <b>UNIQUEPATIDSWTCH</b>.</li> </ol> <p><b>Note:</b> Installing this file into an existing study changes the existing system configuration settings.</p>

File	Description	Changes
Core_SystemConfigThin g.xml	System Config things	Added AUTHENTICATIONCOMPONENT.
Sysform_RightsEdit.xml	Rights Edit form	Added Data Viewer section.  <b>Note:</b> During migration to the InForm 5.5 release, the InForm 5.0 user right <b>Data Export Listings</b> is changed to <b>Access Data Viewer / Data Export Listings</b> .
Sysform_SystemConfig. xml	System Config form	Added Authentication Component.
sysVolume.xml	System form version	Change in version.
Reports/Report.xml	Reports xml	Removed.

## Base MedML changes from the InForm 5.5.1 software to the InForm 5.5.2.1 software

The following table lists the Base MedML changes from the InForm 5.5.1 software to the InForm 5.5.2.1 software. All files are located in the folder <InstallationDirectory>\InForm\XMLBase.

File	Description	Changes
sysVolume.xml	Version Information	Changed version.
sysForm_Password.xml	Password Recovery	Added automatic password recovery.
core_autocalc_User.xml	Internal User	Added <b>Autocalc</b> user

# Design changes

## Design changes for the InForm 5.5 software

The following table lists the files that were created or changed in the InForm 5.5 SP0 software to support the migration procedure.

Path	Description	Change
<InstallationDirectory>\InForm\Bin\DB Ora\UpgradeTrialSchema.cmd	Command file for database upgrade.	Added command to support schema upgrade for 4.6 studies.
<InstallationDirectory>\InForm\Bin\DB Ora\UpgradeTrialSchema.sql	SQL file for database upgrade.	Added command to run the sql file schemaUpgrade_5.5.sql.
<InstallationDirectory>\InForm\Bin\DB Ora\SchemaUpgrade_4.7.sql	SQL file for upgrading from the 4.6 software to the 4.7 software.	<ol style="list-style-type: none"> <li>1 Added code to convert column data types, and insert data to support multiple languages.</li> <li>2 Removed PF_PATCH table.</li> </ol>
<InstallationDirectory>\InForm\Bin\DB Ora\SchemaUpgrade_5.5.sql	New SQL file for upgrading schema from the InForm 5.0 software to the InForm 5.5 software.	File contains schema changes from the InForm 5.0 software to the InForm 5.5 software. Changes include scripts to support the review schema and Partial SV.
<InstallationDirectory>\InForm\Bin\DB Ora\TestInFormVersion.sql	SQL file to verify the InForm software version	Added code to verify the InForm 4.6 version.
<InstallationDirectory>\InForm\Bin\DB Ora\utilityprocedures.sql	SQL file that contains procedures to support InForm migration.	<ol style="list-style-type: none"> <li>1 Procedures were added to convert long raw data to CLOB.</li> <li>2 Added drop table, drop column, and rename column commands.</li> </ol>
<InstallationDirectory>\InForm\Bin\DB Ora\UpgradeResources.cmd	Command file for upgrading resources.	Added the command to install UpgradeSitesandUsers.xml as part of the upgrade process. This file is created when studies are migrated from the InForm 4.6 software to the InForm 5.5 software and it updates the users and sites with the English locale.

Path	Description	Change
<InstallationDirectory>\InForm\Bin\DB Ora\UpgradeSitesAndUsers.cmd	Command file to install ...XMLBase\UpgradeSitesAndUsers.xml	This file installs ... \XMLBase\UpgradeSitesAndUsers.xml that contains Sites and Users MedML with the English locale.
<InstallationDirectory>\InForm\Bin\DB Ora\dropdb.sql	Existing SQL file to drop and recreate an existing study schema owner	Changed to remove all privilege grants to the study schema owner. All grants are now in GrantAccess.sql.
<InstallationDirectory>\InForm\Bin\DB Ora\GrantPermission.sql	New SQL file to grant create table permission to the study schema owner.  This is invoked by UpgradeTrialSchema.cmd file during the upgrade from the InForm 4.6 software to the InForm 5.5 software.	
<InstallationDirectory>\InForm\XMLBase\upgradeAdminConfigurationProperties.xml	Contains admin configuration attributes.	This file has values for admin/configuration attributes UNIQUEPATIDSWTCH, USERNAMEORDER and AUTHENTICATIONCOMPONENT.
<InstallationDirectory>\InForm\XMLBase\UpgradeTrialResources.rsp	Contains resource and BaseXML files to be installed.	The files listed are based on analysis in sections. Also includes the file ... \XMLBase\upgradeAdminConfigurationProperties.xml.
<InstallationDirectory>\InForm\bin\PFI nFormMigrate.exe	Creates ... \XMLBase\UpgradeSitesAndUsers.xml	Retrieves mandatory site and user attributes from the InForm 4.6 study and creates sites and user MedML (UpgradeSitesAndUsers.xml) with locale attributes set to <b>en-US</b> .
<InstallationDirectory>\InForm\Bin\DB Ora\GrantAccess.sql	Grants database privileges to the study database user.	All grants are now in this file, none are in DropDB.sql.

## Design changes for the InForm 5.5.2.1 software

The following table lists the files that were created or changed in the InForm 5.5.2.1 software to support the migration procedure.

Path	Change
<InstallationDirectory>\InForm\Bin\DBOra\UpgradeTrialResources.rsp	Added core_autocalc_User.xml.
<InstallationDirectory>\InForm\Bin\DBOra\SchemaUpgrade_5.5.sql	Upgrade schema to 5.5.2.1.
<InstallationDirectory>\InForm\Bin\DBOra\utilityprocedures.sql	Expanded input validation.

# Database and file changes to support the InForm Portal migration

## Database schema changes for the InForm Portal software

Database Table	Changes
PF_CATEGORIES	LANGUAGEID – New Column Varchar2(50)
PF_SUBCAT	LANGUAGEID – New Column Varchar2(50)

## Data changes for the InForm Portal software

Database Table	Changes
PF_CATEGORIES	Update all rows to have LanguageID value to <b>en-US</b> .
PF_SUBCAT	Update all rows to have LanguageID value to <b>en-US</b> .

## Additions to the PF\_CATEGORIES table for the InForm Portal software

The following table lists the records that were added to the PF\_CATEGORIES table to support the Japanese language in the InForm 5.5.2.1 release. The ID value is calculated based on existing records in the database and inserted with each record.

CATEGOR YNAME	Description	ACTIV E	TAB ORDE R	MAIN URL	STR 1	SECTIO N	SPONSO R	LANGUAG E ID
フォーラム	トライアルに関する様々なトピックについてのディスカッション。アイディアや意見を同僚と共有することができます。	0	0	/webx_trial Name /	50	0	0	ja-JP
ヘルプ	Portalやスタディに関連するヘルプ	0	0	help.a sp	42	0	0	ja-JP
タブ1	トライアル関連資料	1	3	view.a sp		1	0	ja-JP
ホーム	InForm Portal ホーム	1	2	main.a sp		0	0	ja-JP

CATEGORYNAME	Description	ACTIVE	TABORDER	MAIN URL	STR 1	SECTION	SPONSOR	LANGUAGE ID
管理	管理ポータル	1	99	portal/editnav.asp		0	0	ja-JP
コンタクト	主な問合せ先一覧	0	0	contact.asp		0	0	ja-JP
管理者設定	システム設定	1	1	editnav.asp		0	0	ja-JP

## Records inserted into the PF\_SUBCAT table for the InForm Portal software

The following table lists the records that were inserted into the PF\_SUBCAT table for the InForm 5.5.2.1 software for the InForm Portal software. The ID value is calculated based on existing records in the database and inserted with each record.

CATEGORYID	SUBNAME	DESCRIPTION	ACTIVE	TABORDER	LANGUAGEID
PF_CATEGORY ID for help.asp	FAQ	"	1	0	ja-JP
PF_CATEGORY ID for main.asp	ホーム	"	1	0	ja-JP

## File changes to support the InForm Portal software migration

The following table lists the files changed to support the InForm Portal migration to the InForm 5.5.2.1 software.

Path	Description	Changes
<InstallationDirectory>\InForm\InFormPortal\Scripts\InstallSupport\Upgrade4toMLInFormPortal.cmd	Command file for InForm Portal upgrade.	Command to call upgrade4toMLInFormPortal.sql.
<InstallationDirectory>\InForm\InFormPortal\Scripts\InstallSupport\Upgrade\Upgrade4toMLInFormPortal.sql	SQL file for InForm Portal upgrade.	SQL scripts include script to add LANGUAGEID columns to PF_CATEGORIES and PF_SUBCAT tables, and add default data to support Japanese language.