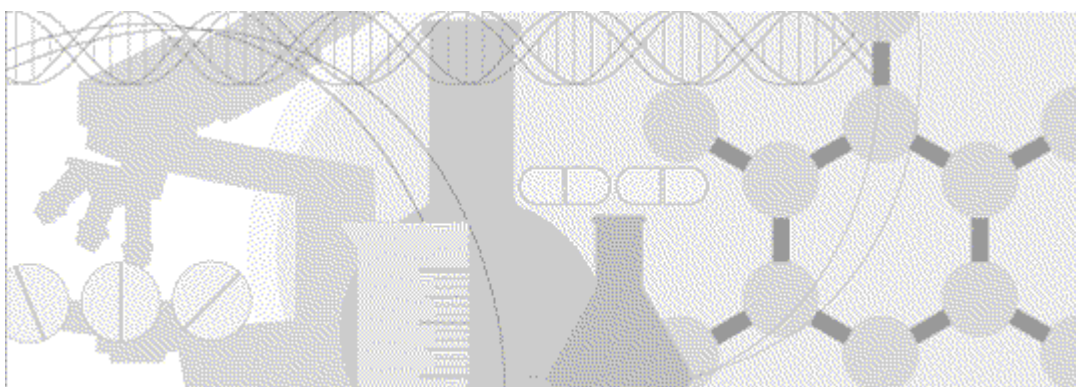


# Portal Administration Guide

Oracle<sup>®</sup> Health Sciences InForm 4.6.5



ORACLE<sup>®</sup>

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## About this guide

The *Portal Administration Guide* provides step-by-step instructions for setting up the InForm Portal software, and configuring and managing the InForm Portal application.

**Note:** The InForm Portal software is installed as part of the InForm software installation procedure. Therefore, this *Administration Guide* assumes that the InForm Portal software has been installed. For more information, see the *Installation and Configuration Guide*.

## Audience

This guide is for InForm Portal administrators, application engineers, or anyone responsible for configuring the InForm Portal application, and for maintaining the InForm Portal application using the options in the user interface.

# Documentation

The product documentation is available from the following locations:

- **Oracle Software Delivery Cloud** (<https://edelivery.oracle.com>)—The complete documentation set.
- **My Oracle Support** (<https://support.oracle.com>)—*Release Notes* and *Known Issues*.
- **Oracle Technology Network** (<http://www.oracle.com/technetwork/documentation>)—The most current documentation set, excluding the *Release Notes* and *Known Issues*.

All documents may not be updated for every InForm Portal release. Therefore, the version numbers for the documents in a release may differ.

Document	Description
<i>Release Notes</i>	The <i>Release Notes</i> document describes enhancements introduced and problems fixed in the current release, upgrade instructions, 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>Secure Configuration Guide</i>	The <i>Secure Configuration Guide</i> provides an overview of the security features provided with the Oracle® Health Sciences InForm Portal application, including details about the general principles of application security, and how to install, configure, and use the InForm Portal 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 software.
<i>Setting Up a Trial with InForm Architect and MedML Guide</i>	The <i>Setting Up a Trial with InForm Architect and MedML Guide</i> describes how to design and implement trials in the InForm application using the InForm Architect application.
InForm Architect online Help	The InForm Architect online Help describes how to design and implement trials in the InForm application using the InForm Architect application.  This information is available from the InForm Architect user interface.
<i>Step by Step for CRCs and CRAs Guide</i>	The <i>Step by Step for CRCs and CRAs Guide</i> describes how to use the InForm application to: <ul style="list-style-type: none"> <li>• Screen and enroll patients.</li> <li>• Enter, update, and monitor clinical data.</li> <li>• Enter and respond to queries.</li> <li>• Run trial management reports and clinical data listings.</li> </ul>
Online Help	The online Help describes how to use and administer the InForm application.  This information is available from the InForm user interface.

Document	Description
<i>Reporting and Analysis Guide</i>	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 trial 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.
<i>Reporting Database Schema Guide</i>	The <i>Reporting Database Schema Guide</i> describes the Reporting and Analysis database schema.
<i>Portal Administration Guide</i>	The <i>Portal Administration Guide</i> provides step-by-step instructions for configuring and managing the InForm Portal application.
<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>
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 trial components into the InForm database. It 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 information is available from the utility 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 information is available from the utility 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>• AutoCode.</li> <li>• Customer-defined database (CDD).</li> <li>• Name value pairs.</li> <li>• Oracle Clinical.</li> </ul> <p>This information is available from the utility user interface.</p>



Document	Description
<i>Third Party Licenses and Notices</i>	The <i>Third Party Licenses and Notices</i> document includes third party technology that may be included in or distributed with this product.

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## Documentation accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

## 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>.

## Finding InForm Portal information and patches on My Oracle Support

The latest information about the InForm Portal application is on the Oracle Support self-service website, My Oracle Support. Before you install and use the InForm Portal application, check My Oracle Support for the latest information, including *Release Notes* and *Known Issues*, alerts, white papers, bulletins, and patches.

### Creating a My Oracle Support account

You must register at My Oracle Support to obtain a user name and password before you can enter the site.

- 1 Open a browser to <https://support.oracle.com>.
- 2 Click the **Register** link.
- 3 Follow the instructions on the registration page.

### Finding information and articles

- 1 Sign in to My Oracle Support at <https://support.oracle.com>.
- 2 If you know the ID number of the article you need, enter the number in the text box at the top right of any page, and then click the magnifying glass icon or press **Enter**.
- 3 To search the knowledge base, click the **Knowledge** tab, and then use the options on the page to search by:
  - Product name or family.
  - Keywords or exact terms.

### Finding patches

You can search for patches by patch ID or number, product, or family.

- 1 Sign in to My Oracle Support at <https://support.oracle.com>.
- 2 Click the **Patches & Updates** tab.
- 3 Enter your search criteria and click **Search**.
- 4 Click the patch ID number.

The system displays details about the patch. You can view the Read Me file before downloading the patch.

- 5 Click **Download**, and then follow the instructions on the screen to download, save, and install the patch files.

## Finding Oracle documentation

The Oracle website contains links to Oracle user and reference documentation. You can view or download a single document or an entire product library.

## Finding Oracle Health Sciences documentation

For Oracle Health Sciences applications, go to the Oracle Health Sciences Documentation page at <http://www.oracle.com/technetwork/documentation/hsgbu-clinical-407519.html>.

**Note:** Always check the Oracle Health Sciences Documentation page to ensure you have the most up-to-date documentation.

## Finding other Oracle documentation

- 1 Do one of the following:
  - Go to <http://www.oracle.com/technology/documentation/index.html>.
  - Go to <http://www.oracle.com>, point to the **Support** tab, and then click **Product Documentation**.
- 2 Scroll to the product you need, and click the link.

## Finding prerequisite software for Oracle Health Sciences applications

Prerequisite software for Oracle Health Sciences applications is available from the following locations:

- Download the latest major or minor release from the Oracle Software Delivery Cloud (<https://edelivery.oracle.com/>).

For information on the credentials that are required for authorized downloads, click **FAQs** on the main page of the Oracle Software Delivery Cloud portal.

- Download subsequent patch sets and patches from My Oracle Support (<https://support.oracle.com>).

To find patch sets or patches, select the **Patches & Updates** tab.

If a previous version of prerequisite software is no longer available on the Oracle Software Delivery Cloud, log a software media request Service Request (SR). Previous versions of prerequisite software are archived and can usually be downloaded. After you open an SR, you can check its status:

- US customers: Call 1-800-223-1711.
- Outside the US: Check [www.oracle.com/us/support/contact/index.html](http://www.oracle.com/us/support/contact/index.html) for your local Oracle Support phone number.

For more information on logging a media request SR, go to My Oracle Support for Document 1071023.1: Requesting Physical Shipment or Download URL for Software Media (<https://support.oracle.com/epmos/faces/DocumentDisplay?id=1071023.1>).



## CHAPTER 1

# About the InForm Portal application

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## Overview of the InForm Portal application

The InForm Portal application allows an administrator to add a web portal, which is a dynamic Home page, to a trial. The Home page gives you access to a repository of information that is relevant to your trial. Rights determine the information that you see, such as:

- White papers.
- Links to key contacts.
- News items.

Custom tabs appear along the top of the InForm Portal application, to the right of the InForm navigation pane. The tabs are the first level of organization for the content of the InForm Portal application.

Users with sufficient rights can configure the contents of the InForm Portal application, including organizing the content on each tab using sections. For more information, see *Working with tabs and sections* (on page 14).

For information about giving users access to the InForm Portal application, see *Setting the Home page for a user* (on page 13).

## Supported document types

The InForm Portal application supports uploading the following types of documents:

- Microsoft Word/RTF and DOC.
- Adobe Acrobat Portable Document Format (PDF).
- Hypertext Markup Language (HTML).
- Microsoft PowerPoint.
- Microsoft Excel.
- Microsoft Project.
- Images in GIF, PNG, and JPG format.

The administrators upload documents using a web-based form. The InForm Portal application maintains an audit trail of document additions, updates, and modifications.

## InForm Portal users

InForm users who have been assigned the correct Home page property in the InForm application are automatically set up as InForm Portal users. When they log into the InForm application they will go to InForm Portal Home page.

A Configuration Administrator is an InForm Portal user who has the rights to configure global settings for the InForm Portal application, and to create and manage Portal Administrators (InForm Portal users with certain administrator rights).

A Portal Administrator is an InForm Portal user who has been granted one or more of the following rights:

- Add tab
- Edit tab
- Edit tab order
- Add section
- Edit section
- Upload documents
- Update documents
- Update homepage
- Update company logo

## Viewing the InForm Portal

- In the InForm navigation pane, click **Home**.

The InForm Portal pages appear within the InForm main user interface window.





## CHAPTER 2

# InForm Portal configuration

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## Overview of configuring the InForm Portal application

Configuring the InForm Portal application means setting up the InForm Portal application to appear and perform to your specifications. Configuration Administrators are the only InForm Portal user who can configure the InForm Portal application. A Configuration Administrator must be a member an InForm rights group that has been granted the **InForm Portal Config Admin** right.

### About the Configuration Administrator

To set up the InForm Portal application, the Configuration Administrator performs the following tasks:

- Manage Portal Administrators
  - *Assign Portal Administrator rights* (on page 7).
  - *Edit the rights of Portal Administrators* (on page 7).
  - *Disable Portal Administrators* (on page 7).
- *Enable the viewing of audit trails* (on page 8).

# Managing Portal Administrators

## Assign Portal Administrator rights

The Configuration Administrator creates Portal Administrators and defines their rights. The Portal Administrators are usually clinical trial personnel who manage the look and content of the InForm Portal application and perform most of the InForm Portal maintenance.

- 1 In the InForm navigation pane, click **Home**.
- 2 In the InForm Portal application, select the **Config Admin** tab.
- 3 In the **Config Options** section, click **Add Portal Admin**.
- 4 In the **InForm User** field, select the name of the user to which you want to assign Portal Administrator rights.
- 5 Do one of the following:
  - For the Configuration Administrator, select all rights.
  - For a Portal Administrator, select each right you want to assign to the Portal Administrator.For more information, see *InForm Portal users* (on page 3).
- 6 Click **Submit**.
- 7 To view the updates, on the **Config Admin** page, click **Refresh**.

## Edit the rights of a Portal Administrator

- 1 Log in to the InForm application as the Configuration Administrator.
- 2 In the InForm navigation pane, click **Home**.
- 3 In the InForm Portal application, select the **Config Admin** tab.
- 4 In the **Config Options** section, click **Edit Portal Admin**.
- 5 To the right of the name of the Portal Administrator you want to edit, click **Edit**.
- 6 Select or deselect the rights for this Portal Administrator.
- 7 Click **Submit**.

## Disable a Portal Administrator

- 1 Log in to the InForm application as the Configuration Administrator.
- 2 In the InForm navigation pane, click **Home**.
- 3 In the InForm Portal application, select the **Config Admin** tab.
- 4 In the **Config Options** section, click **Edit Portal Admin**.
- 5 To the right of the name of the Portal Administrator you want to edit, click **Edit**.
- 6 In the **Active** field, select **No**.
- 7 Click **Submit**.

## Enable the display of document audit trails

If you want users to see the history of a document, the Configuration Administrator can display the audit trail.

For more information, see *Document audit trail* (on page 23).

- 1 Log in to the InForm application as the Configuration Administrator.
- 2 In the InForm navigation pane, click **Home**.
- 3 In the InForm Portal application, select the **Config Admin** tab.
- 4 In the **Config Options** section, click **System Config**.
- 5 In the **User Audit Trail** field, select **Enabled**.
- 6 Click **Submit**.

**Note:** If the Configuration Administrator has enabled this function, users can view the document history by clicking the + (maximize) button adjacent to the document. To collapse the document history so that only the most recent version of the document is visible, users click the - (minimize) button.

**CHAPTER 3**

**InForm Portal administration**

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## Overview of administering the InForm Portal application

A Portal Administrator is an InForm user who has been given rights by the Configuration Administrator to administer the InForm Portal application.

Although the responsibilities of each Portal Administrator depend on the rights granted by the Configuration Administrator, as a group they are responsible for the following:

- *Loading a company logo* (on page 12).
- *Updating the Home page with an HTML file* (on page 13).
- *Working with tabs and sections* (on page 14).
  - *Renaming tabs* (on page 14).
  - *Reordering tabs* (on page 15).
  - *Adding sections to tabs* (on page 15).
  - *Activating or deactivating tabs* (on page 16).
  - *Setting up key contacts* (on page 18).
- *Managing documents* (on page 19).
  - *Uploading documents* (on page 21).
  - *Updating documents* (on page 22).

## About the Admin tab

Only the Configuration Administrator and Portal Administrators have rights to view the Admin tab. The options available on this page allow administrators to modify and define the contents of the InForm Portal application. The options that are available to a user are set by the Configuration Administrator.

For more information, see *InForm Portal users* (on page 3) and *Assigning Portal Administrator rights* (on page 7).

## Admin page options

The options on the Admin tab are organized into two main sections.

Heading	Options
Add New Records	<ul style="list-style-type: none"> <li>• Add a new tab.</li> <li>• Add a new section to a tab.</li> <li>• Upload a document.</li> </ul>
Edit Records	<ul style="list-style-type: none"> <li>• Tabs.</li> <li>• Sections.</li> <li>• Update documents.</li> <li>• Tab order.</li> <li>• Update Home page.</li> <li>• Update Company logo.</li> </ul>

## Loading the company logo

The company logo appears on the tabs that you create in the InForm Portal application. By default, an image is not specified as the company logo.

The maximum width of the image file is 600 pixels, and the maximum height is 300 pixels. The following file types are supported: GIF, JPG, and PNG.

- 1 In the InForm Portal application, select the **Admin** tab.
- 2 In the **Edit Records** section, click **Update Company Logo**.  
The Update Company Logo page appears.
- 3 Click **Browse**, navigate to the image file, and click **Open**.
- 4 Click **Submit**.



# Managing the InForm Portal Home page

## Setting the Home page for a user

InForm administrators can set the InForm Portal to be the Home page for a user.

- 1 Log in to the InForm application.
- 2 In the navigation toolbar, click **Admin**.
- 3 Click **Users**.
- 4 Click the **First Name**, **Last Name**, or **Account Name** link for the person for whom you want to designate the InForm Portal application as the Home page.

The User Details page appears.

- 5 Scroll to the bottom of the page.
- 6 In the **Home Page** field, type the path to the InForm Portal Home page.

The default path is `./portal/default.htm`.

- 7 Click **Submit**.

## Updating the Home page with an HTML file

- 1 Create an HTML file for the Home page.
  - The HTML file for the Home page must be plain HTML without JavaScript. The application processes and sanitizes the file, removing script tags and other potentially harmful elements.
  - If the HTML file for the Home page contains images, the src attribute of the image tag must use this syntax:

```

```

where `<image_name.ext>` is the name of the image file, including its extension.

- If the HTML file for the Home page includes the company logo, the src attribute of the image tag must use this syntax:

```

```

- 2 In the InForm Portal application, select the **Admin** tab.
- 3 In the **Edit Records** section, click **Update Homepage**.

The Update Homepage page appears.

- 4 Next to the **Select html file** field, click **Browse**, navigate to the HTML file, and click **Open**.
- 5 If the HTML file contains image files, navigate to the files individually, using each of the **Select image file** fields.

**Note:** If the HTML file contains more than five image files, submit the files, return to the Update Homepage page, and upload the additional image files.

- 6 Click **Submit**.

## Working with tabs and sections

Tabs are the first level of organization for the content of the InForm Portal application. You might decide to designate one tab for each of the following purposes:

- White papers
- Key contacts
- News

You can organize the contents of a tab using sections. For example, you might group white papers based on their categories of information. For more information, see *Adding a section to a tab* (on page 15).

For more information, see:

- *Tab types and InForm Portal pages* (on page 17).
- *Adding a section to a tab* (on page 15).

## Creating and naming a tab

- 1 In the InForm Portal application, select the **Admin** tab.
- 2 In the **Add New Records** section, click **Tabs**.  
A list of the existing tab headings appears, followed by the New Tab field.
- 3 Complete the following fields:
  - **New Tab**—Name that you want to appear on the tab.
  - **Sponsor Tab**—Allow only sponsor users to see the tab.
  - **Description**—Brief description of the contents of the tab.
- 4 Click **Submit**.
- 5 To view the newly created tab, click **Refresh**.

**Note:** If you do not want to use the default tab names supplied with the InForm Portal application, an administrator can edit the names. For more information, see *Renaming a tab* (on page 14).

## Renaming a tab

- 1 In the InForm Portal application, select the **Admin** tab.
- 2 In the **Edit Records** section, click **Tabs**.
- 3 To the right of the tab name that you want to rename, click **Edit**.
- 4 Make your changes.
- 5 Click **Submit**.

## Reordering tabs

- 1 In the InForm Portal application, select the **Admin** tab.
- 2 In the **Edit Records** section, click **Tab Order**.
  - To move the selected tab one place to the left, click **Move Up**.
  - To move the selected tab one place to the right, click **Move Down**.

The page adjusts to accommodate as many tabs as requested up to the maximum of 13 tabs.

**Note:** Make sure that all the tabs are visible when the page is at full view. There is no horizontal scroll bar on the page.

## Adding a section to a tab

Section headings are categories specified on a document tab. Documents are added to sections on tabs. Before you can upload any documents to a tab, the tab must contain at least one section.

When creating a new section heading:

- Select the most appropriate tab.
- Organize documents logically.
- Name tabs, sections, and documents descriptively.
- Consider the focus and information needs of the audience.

To add a section to a tab:

- 1 In the InForm Portal application, select the **Admin** tab.
- 2 In the **Add New Records** section, click **Sections**.
- 3 Complete the following fields:
  - **Title**—Name of the section.
  - **Description**—Information about the section that will appear next to the section title on the tab.
  - **Tab**—Tab to place the section on.
  - **Is This Section Visible?**—Whether the section and its contents will be visible to end users.
- 4 Click **Submit**.

## Editing section properties

The Configuration Administrator or Portal Administrators with the appropriate rights can edit the properties of a section. For example, you can change the name or description of a section, or make a section visible when it is ready to be used.

- 1 In the InForm Portal application, select the **Admin** tab.
- 2 In the **Edit Records** section, click **Sections**.  
The Edit Sections page appears.
- 3 To the right of the section that you want to edit, click **Edit**.  
The section properties page appears.
- 4 Edit the fields as necessary.
- 5 Click **Submit**.

**Note:** The section title does not appear on the tab until a document has been uploaded to the section.

## Activating or deactivating a tab

The Configuration Administrator or Portal Administrators with the right to edit tabs can activate (make visible) or deactivate (hide) tabs.

- 1 In the InForm Portal application, select the **Admin** tab.
- 2 In the **Edit Records** section, click **Tabs**.
- 3 Scroll to the tab you want to activate or deactivate.
- 4 To the right of the tab you want to edit, click **Edit**.
- 5 Do one of the following:
  - To activate the tab, select **Active**.
  - To deactivate the tab, deselect **Active**.
- 6 Click **Submit**.

## Tab types and InForm Portal pages

The following tabs are generic to most InForm Portal applications.

Tab type	Description
Admin	Displays the tasks that your rights allow you to perform, such as: <ul style="list-style-type: none"> <li>• Uploading and updating documents.</li> <li>• Managing sections, tabs, and tab order.</li> <li>• Updating the Home page and company logo.</li> </ul>
Home	Available if the InForm Portal application is assigned as your Home page. Displays the company logo and the HTML page designated as the Home page.
Contacts	Displays contact information for users marked <b>Public</b> in the InForm database.  Information comes directly from the InForm database. If the data is local (for example, if it includes a link to an email site), the InForm Portal application contains the link.
Documents	Displays the names of uploaded documents. The default Document tab is called Tab 1.
Help	Displays the names and descriptions of the tabs in the InForm Portal application.

## Setting up key contacts

InForm administrators can enable user information to be displayed on an InForm Portal Contacts tab to help trial participants reach key contacts.

- 1 In the InForm navigation pane, select **Admin**.
- 2 Select the **Users** tab.
- 3 Select the user you want to designate as a key contact.
- 4 Verify that the phone number and email fields contain data.
- 5 To make a user appear on the **Contacts** page, in the **Description** field, type:  
**Public**
- 6 Click **Submit**.
- 7 To add more contacts, repeat steps 2 to 6.

When you select the **Contacts** tab, the first name, last name, title, day phone number, and email address of each user appears in the key contacts table.

# Managing documents

## Before uploading a document

A tab must have at least one section before you can upload documents to it.

For more information, see *Creating and naming a tab* (on page 14) and *Adding a section to a tab* (on page 15).

**Note:** Before you upload any document, be sure to run it through a virus scanning program.

You can upload documents in any of the following formats:

- Microsoft Word/RTF or DOC.
- Adobe Acrobat Portable Document Format (PDF).
- Hypertext Markup Language (HTML).
- Microsoft PowerPoint.
- Microsoft Excel.
- Microsoft Project.
- GIF and JPG images.

**Note:** Documents in HTML, GIF, and JPG formats appear directly in the browser. The other file formats require separate viewers, which are available from Adobe ([www.adobe.com](http://www.adobe.com)) and Microsoft ([www.microsoft.com](http://www.microsoft.com)).

Document property	Description
Tab	Name of the tab on which you will place the document.
Section	Name of the section on which you will place the document. <b>Note:</b> If the section does not exist, you must create it before you upload the document.
Document Title	Title that will appear on the InForm Portal tab. The title should be descriptive and should relate to InForm Portal users. <b>Note:</b> You can change this property at any time. For more information, see <i>Editing document properties</i> (on page 22).
Ref Name	Unique document identifier, up to 50 characters, that connects this document to all previous and subsequent versions of the document. The RefName is required in order to maintain the audit trail for the document. <b>Note:</b> The RefName for a document cannot be changed.

Document property	Description
Visibility to users Y/N	<p>Whether the document should be visible to the InForm Portal users when it is uploaded.</p> <p><b>Note:</b> You can change this property at any time.</p> <p>For more information, see <i>Editing document properties</i> (on page 22).</p>
Sponsor only Y/N	<p>Whether the document should be viewed by all users, or only by sponsor users.</p> <p><b>Note:</b> You can change this property at any time.</p> <p>For more information, see <i>Editing document properties</i> (on page 22).</p>
Format	<p>Format(s) for the document. Consider how your users will use the document and what software they have for:</p> <ul style="list-style-type: none"><li>• <b>Downloading and editing</b>—Make the document available in Microsoft Word, Microsoft PowerPoint, Microsoft Excel spreadsheet software, or Microsoft Project.</li><li>• <b>Downloading and printing</b>—Make the document available in Adobe Acrobat (PDF) format.</li><li>• <b>Viewing online</b>—Make the document available in HTML format.</li></ul>



## Uploading a document

- 1 In the InForm Portal application, select the **Admin** tab.
- 2 In the **Add New Records** section, click **Upload Document**.

The Document Uploading console appears.

- 3 Complete the following fields:

**Note:** You can upload the same document with up to three different file extensions at one time.

**Note:** The InForm Portal application does not support embedded graphics in HTML documents.

- **Title**—Title of the document.
- **Ref Name**—Unique identifier (up to 50 characters) that is used to maintain the document's audit trail.
- **Description**—Description of the document.
- **Select Tab**—Tab on which you want to put the document.

**Note:** Only tabs that have at least one section heading assigned to them appear on this drop-down menu.

- **Select Section**—Name of the section in which to add the document.
  - **Is This Document Visible**—Whether the document will be visible to users.
  - **Select Document**—Path of the document. Recommended file size is no larger than 3MB.
- 4 To add more formats of the same document, repeat steps 2 to 3.
  - 5 Click **Submit**.

A summary statement appears, which lists the name of the file uploaded, the size and type of the file, and the estimated time required for a user to download it.

## Updating a document

You may update a document at any time. The InForm Portal application maintains an audit trail of the document history. For auditing purposes, documents are never deleted, but you can hide a document when you no longer want it available to users. For more information, ***Making a document invisible*** (on page 24).

- 1 In the InForm Portal application, select the **Admin** tab.
- 2 In the **Edit Records** section, click **Update Documents**.  
The Tab Name drop-down menu appears.
- 3 Select the tab where your document is located.
- 4 Click **Next**.
- 5 In the row associated with the selected document, click **Insert**.

The Document Console appears.

- 6 Complete the following fields:

**Note:** You can upload the same document with up to three different file extensions at one time.

- **Reason for Change**—Reason for making the change.
  - **Is This Document Visible**—Whether the document will be visible to users.
  - **Select Document**—Path of the document. Recommended file size is no larger than 3MB.
- 7 Click **Submit**.  
A summary statement appears, which lists the name of the file uploaded, the size and type of the file, and the estimated time required for a user to download the file.

## Editing document properties

You can modify document properties such as title and description without updating and uploading the document again.

- 1 In the InForm Portal application, select the **Admin** tab.
- 2 In the **Edit Records** section, click **Update Documents**.  
The Tab Name drop-down menu appears.
- 3 Select the tab where your document is located.
- 4 Click **Next**.
- 5 Click **Edit**.  
The Document Uploading console appears.
- 6 Edit any of the document properties on the console except the RefName.
- 7 Click **Submit**.

## Document audit trail

The InForm Portal application automatically logs the history of every uploaded document, including the following:

- Name.
- Time.
- Date of the upload or change.
- Reason for the change.

The InForm Portal application can be configured to:

- Allow only the most recent version of a document to be seen by hiding all the older files.
- Display all versions of the documents ever uploaded.

**Note:** The InForm Portal application stores all versions of every document, so that a complete audit trail is maintained.

For more information, see *Enable the display of document audit trails* (on page 8).

## Restricting the availability of a document to end users

Administrators may need to restrict the availability of a document for several reasons, including:

- A document is awaiting approval.
- A document is relevant only to the sponsor users and has no significance to site users.

You can control access to published documents by:

- *Making a document invisible* (on page 24).
- *Restricting document access to sponsor users* (on page 24).

### Making a document invisible

- 1 In the InForm Portal application, select the **Admin** tab.
- 2 In the **Add New Records** section, click **Upload Document**.  
The Document Uploading console appears.
- 3 Complete all the fields.
- 4 In the **Is This Document Visible** field, select **No**.
- 5 Click **Submit**.

You can change whether a document is visible when you update the document.

For more information, see *Updating a document* (on page 22).

### Restricting document access to sponsor users

You can limit the audience for a document by putting the document on a tab that is designated for sponsors only.

- 1 In the InForm Portal application, select the **Admin** tab.
- 2 In the **Edit Records** section, click **Tabs**.
- 3 To the right of the tab you want to edit, click **Edit**.
- 4 Select **Sponsor**.
- 5 Click **Submit**.