# Portal Administration Guide

Oracle® Health Sciences InForm 6.0

**ORACLE**

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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 Guide*.

## Audience

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

# Related information

## Documentation

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

| Document | Description |
| --- | --- |
| *Release Notes* | The *Release Notes* document describes enhancements introduced and problems fixed in the current release, upgrade considerations, release history, and other late-breaking information. |
| *Known Issues* | The *Known Issues* document provides detailed information about the known issues in this release, along with workarounds, if available. **Note:** The most current list of known issues is available on the Extranet. To sign in to the Extranet, go to https://extranet.phaseforward.com. |
| *Upgrade and Migration 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. |
| *Secure Configuration Guide* | The *Secure Configuration Guide* 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. |
| *Installation Guide* | The *Installation Guide* describes how to install the software and configure the environment for the InForm application and Cognos 8 Business Intelligence software. |
| *Study and Reporting Setup Guide* | The *Study and Reporting Setup Guide* 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. |
| *User Guide* | The *User Guide* 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. This document is also available from the Documentation CD and the InForm user interface. |

| Document | Description |
|---|---|
| *Reporting and Analysis Guide* | The *Reporting and Analysis Guide* 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. This document is also available from the Documentation CD. |
| *Reporting Database Schema Guide* | The *Reporting Database Schema Guide* describes the Reporting and Analysis database schema, and provides information on creating Reporting Database Extracts (RDEs). |
| *Portal Administration 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. This document is also available from the Documentation CD. |
| *Utilities Guide* | The *Utilities Guide* provides information about and step-by-step instructions for using the following utilities: <ul><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> 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. This document is also available from the Documentation CD. |
| MedML Installer utility online Help | 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. 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. This document is also available from the user interface. |

| Document | Description |
| --- | --- |
| InForm Data Export utility online Help | 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:<br><br>• Customer-defined database (CDD).<br><br>• Name value pairs.<br><br>This document is also available from the user interface. |
| InForm Data Import utility online Help | 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.<br><br>This document is also available from the user interface. |

# 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.

# About the InForm Portal application

## In this chapter

# Overview of the InForm Portal application

The InForm Portal application is a tool you can use to add a web portal to a study. A web portal is a dynamic Home page that gives InForm users access to a repository of information that is relevant to their study such as:

- White papers.

- Links to key contacts.

- News items.

The InForm Portal application provides:

- An interface for customizing the look and content of the InForm Portal application.

- The capability to present content in the language of the product locale for the user.

- Automatic document history logging, with earlier versions of documents stored and available to comply with regulations.

- Customizable administrative, user group, and access settings for fine-tuning user group rights and privileges.

- Security levels to prevent access or changes by unauthorized individuals.

The InForm Portal application contains an administrator interface with which a Configuration Administrator or a Portal Administrator with the appropriate rights can:

- Configure the InForm Portal application.

- Organize the information that is accessed through the InForm Portal application.

## InForm Portal components

The InForm Portal application is integrated with an InForm study, so the InForm Portal application appears in the InForm content pane. The InForm Portal application can be set up for each product locale for a study. To display the InForm Portal application, in the InForm navigation toolbar, click the Home icon (). The InForm Portal pages appear within the InForm application along with the InForm navigation toolbar.

The InForm Portal application displays information to end users based on the User Type assigned to the user in the InForm application, and the properties specified for tabs and documents in the InForm Portal application.

- Custom tabs appear along the top of the InForm Portal application, below the InForm navigation toolbar.

  The tabs are the first level of organization for the content of the InForm Portal application.

  Each tab can be further organized into sections.

- The Configuration Administrator and Portal Administrators can view additional tabs that provide access to options for configuring the contents of the InForm Portal application.

## Supported document types

The InForm Portal application supports uploading the following document types:

- Microsoft Word/RTF or DOC.

- Adobe Acrobat Portable Document Format (PDF).

- Hypertext Markup Language (HTML).

- Microsoft PowerPoint.

- Microsoft Excel spreadsheet software.

- Microsoft Project.

- GIF and JPG images.

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

## User roles and rights for accessing the InForm Portal application

All InForm Portal users must be registered InForm users. However, not all registered InForm users are assigned access to the InForm Portal application. The rights group assigned to a user within the InForm application determines the User Type.

| User Type | Privileges |
| --- | --- |
| Configuration Administrator | The InForm Portal Config Admin right provides the necessary rights for the Configuration Administrator: <br><br>• View all InForm Portal tabs including the Config Admin and Admin tabs. <br><br>• Create and edit tabs and sections. <br>For more information, see *Creating and naming a tab* (on page 21). <br><br>• Upload documents to the InForm Portal application. <br><br>• Modify, add, and update InForm Portal content. <br><br>• Define Portal Administrators and their rights. <br><br>• Define InForm Portal users. <br><br>• Enable sponsor and user audit trails. <br><br>• Change the InForm Portal colors. <br><br>**Note:** This User Type also needs the InForm rights to modify user information. |

| User Type | Privileges |
| --- | --- |
| Portal Administrator | • View the options for which the Configuration Administrator has granted authority.<br><br>• View the Admin tab.<br><br>• Edit tabs.<br><br>• Add and edit sections to tabs.<br><br>• Upload documents to the InForm Portal application.<br><br>• Modify, add, and update InForm Portal content.<br><br>• Change the InForm Portal colors. |
| Sponsor | • Read information in the InForm Portal application related to the rights associated with their user ID, including those that were specified as sponsor-only.<br><br>**Note:** This User Type cannot modify or add to the InForm Portal application in any way. |
| Site | • Read information in the InForm Portal application related to the rights associated with their user ID and not specified as sponsor-only.<br><br>**Note:** This User Type cannot modify or add to the InForm Portal application in any way. |

# System requirements

Each InForm Portal application is specific to one InForm study. Before the InForm Portal application can be integrated into a study, the following conditions must be met.

- The InForm 6.0 software must be installed and configured.

- A study must be set up and running.

> **Note: Only the base study needs to be installed. Forms and rules are not required.**

- The InForm Portal software must be installed.

  The InForm Portal application is an optional feature that can be installed as part of the InForm software core installation. For more information, see the *Installation Guide*.

  To verify that the InForm Portal application is installed, verify that there is a folder named **InFormPortal** in the directory in which the InForm software was installed.

C H A P T E R  2

# Setting up the InForm Portal application

## In this chapter

# Worksheet for the InForm Portal setup variables

When you set up an InForm Portal, you must provide installation-specific information, such as the:

- Study name.

- Server and drive on which the InForm Portal application runs.

The following table lists every variable for which you must supply a value.

Complete the Value field for each item in this worksheet before you begin to set up the software, so that you know what to enter for each variable.

> **Caution:** Do not create an InForm Portal database with an existing user name. Doing so overwrites any existing InForm Portal database with that name. Data that is already in that InForm Portal database will be lost.

| Item | Description/Value | Reference |
|------|-------------------|-----------|
| Study Name | Name of the InForm study that will contain the InForm Portal application.<br><br>**Note:** To find the study name and user name, open a Command Prompt window, change to the \<InstallationDirctory>\InForm directory and run the following command:<br><br>PFADMIN VIEW SERVICE<br><br>**Example:** PFST60<br><br>**Value:** | • *Step 1* (on page 10)<br>• *Step 2* (on page 11) |
| InForm Portal Virtual Directory Path | Physical path to the virtual directory for the InForm Portal application. The virtual directory for the InForm Portal application is located under the virtual directory for the study.<br><br>**Example:** E:/OracleHS/InForm/InFormPortal/PFST60<br><br>**Value:** | • *Step 1* (on page 10) |
| Oracle Connect String | Oracle connection string for the InForm database.<br><br>Located in the tnsnames.ora file.<br><br>**Example:** Trial1<br><br>**Value:** | • *Step 1* (on page 10) |
| InForm Portal User Name | User name for the InForm Portal you are setting up.<br><br>**Example:** InFormPortalUID<br><br>**Value:** | • *Step 1* (on page 10) |

| Item | Description/Value | Reference |
|------|-------------------|-----------|
| InForm Portal Password | Password for the InForm Portal application you are setting up.<br><br>**Example:** InFormPortalPID<br><br>**Value:** | • *Step 1* (on page 10) |
| Study Connect String | Oracle connection string for the InForm database for the study.<br><br>**Example:** Trial1<br><br>**Value:** | • *Step 1* (on page 10) |
| Study User Name | User name of the InForm study that will contain the InForm Portal application.<br><br>**Note:** To find the study name and user name, open a Command Prompt window, change to the <InstallationDirctory>\InForm directory and run the following command:<br><br>PFADMIN VIEW SERVICE<br><br>**Example:** PFST60UID<br><br>**Value:** | • *Step 1* (on page 10) |
| Study Password | Password of the InForm study that will contain the InForm Portal application.<br><br>**Example:** PFST60PID<br><br>**Value:** | • *Step 1* (on page 10) |
| Oracle Sys User Name | Oracle system user name.<br><br>**Example:** sysuser<br><br>**Value:** | • *Step 1* (on page 10) |
| Oracle Sys Password | Oracle system password.<br><br>**Example:** sysuserpid<br><br>**Value:** | • *Step 1* (on page 10) |
| InForm Portal Tablespace Path | Path to the Oracle tables.<br><br>**Example:** D:\oracle\product\11.2.0\oradata<br><br>**Value:** | • *Step 1* (on page 10) |

## Using the setup variables

Replace the variables that appear in italics and are enclosed in brackets (for example, *<Oracle Sys User Name>*) with the actual values for your system.

The expressions you enter depend on the specific server and study for which you are setting up the InForm Portal application.

# Step 1: Run the Portal Configuration wizard

1  Select **Start > Program Files > Oracle > InForm 6.0 > Portal Configuration Wizard**.

The Portal Configuration wizard appears.

2  In the **Study Name** field, select *<Study Name>*.

3  Click **Next**.

4  Accept the default location, or click **Browse** and select the desired location.

> **Note:** The default location is *<InForm Portal Virtual Directory Path>*. If the directory is not present on the computer, the Portal Configuration wizard creates it.

5  Click **Next**.

The Database Configuration page appears.

6  Complete the following fields:

- **Portal DB Connection String**—*<Oracle Connect String>*.
- **Portal DB Username**—*<InForm Portal User Name>*.
- **Portal DB User Password**—*<InForm Portal Password>*.
- **Study DB Connection String**—*<Study Connect String>*.
- **Study DB Username (Study UID)**—*<Study User Name>*.
- **Study DB User Password (Study PID)**—*<Study Password>*.
- **Oracle System Username**—*<Oracle Sys User Name>*.
- **Oracle System Password**—*<Oracle Sys Password>*.
- **Portal DB Tablespace Location**—*<InForm Portal Tablespace Path>*.

7  Select or deselect **Create Portal DB Schema**.

> **Note:** If an InForm Portal database schema already exists, and you select the Create Portal DB Schema checkbox, the database schema is overwritten and a new database schema is created.

8  Click **Next**.

The confirmation page appears.

9  Click **Configure**.

10  Click **Finish**.

> **Note:** For IIS 7.5, the maximum file size is set to 4 MB by default. The setting can be resized up to 30 MB by editing the web.config file. Add following element to the <system.web> node: **<httpRuntime maxRequestLength="x">** to specify the file size in kilobytes. For example, if you wanted to increase the maximum file size to 8 MB, the entry would be: <httpRuntime maxRequestLength="8192">.

# Step 2: Set up the Configuration Administrator

You must set up a Configuration Administrator for each product locale that is available for the study. A Configuration Administrator is an InForm Portal user who has been assigned the InForm Portal Config Admin right. The Configuration Administrator 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). Configuration Administrators are members of the InForm Portal Admin rights group. You create this rights group in the InForm application and then assign one user to the group for each product locale.

For more information, see *About the Configuration Administrator* (on page 16).

> **Note:** You can also use MedML to set up the Configuration Administrator and assign rights. For more information, see the MedML online Help or the *Utilities Guide*. For example:
>
> **<RIGHTSGROUP GROUPNAME="InForm Portal Config Admin">**
>   **<RIGHTREF RIGHT="InForm Portal Admin" />**
> **</RIGHTSGROUP>**

## Creating the InForm Portal Admin rights group

1   In a web browser, open the InForm study in which the InForm Portal application is installed.

2   Log in as a user who has rights to create a rights group.

3   In the InForm navigation toolbar, click the **Admin** icon ( ).

4   Click **Rights**.

5   Click the **Add Rights Group** button.

The Edit Group Properties page appears.

6   In the **Rights Group Name** field, type **InForm Portal Admin**.

7   Assign the InForm Portal Admin group the **InForm Portal Config Admin** right.

For more information, see *User roles and rights for accessing the InForm Portal application* (on page 3).

8   Click **Submit**.

## Assigning rights to the Configuration Administrator

In the InForm application, assign one user as the Configuration Administrator for each product locale for which the study is available.

1   Click **Users**.

2   Click the **Last Name**, **First Name**, or **Account Name** link for the user who is to be the Configuration Administrator.

> **Note:** You may need to create a new user. Remember to change the user's password and activate the new user.

The User details page appears.

3    Select the **Groups** tab.

4    From the **Rights Group** drop-down list, select **InForm Portal Admin**.

5    Click **Submit**.

6    Select the **Details** tab.

7    Scroll to the bottom of the page. In the **Home Page** field, type:

    `./Portal/default.htm`

8    Click **Submit**.

# Step 3: Customize the InForm Portal Home page

You can customize the InForm Portal Home page by adding a logo and text about the study.

1   To add a logo:

    a   Obtain a GIF file containing the logo.

    b   Name the file **company_logo.gif**.

    c   Store the file in the *<InForm Portal Virtual Directory Path>*/**images** folder.

> **Note:** For best results, the height of the company_logo.gif file should not be greater than 50 pixels.

2   To add text to the InForm Portal Home page, create an HTML file containing the text.

3   Save the file as **homedefault.html** in the *<InForm Portal Virtual Directory Path>*/**views/display** folder.

## Localizing the InForm Portal Home page

If the InForm Portal Home page must support multiple locales, you need to add JavaScript to homedefault.html to evaluate the browser locale setting, and then do one of the following:

- Redirect the user to a locale-specific page.

- Use the DOM (Document Object Model) to enable or disable locale-specific content on the Home page.

# Uninstalling the InForm Portal software

For each study:

1   Reset the Home page of every InForm Portal user from the InForm Portal Home page to the Home page of the study.

2   Stop the study by using the following command:

    **pfadmin stop trial <***studyname***>**

3   Delete the InForm Portal virtual directory in IIS.

    *<Servername>* > Sites > *<Studyname>*>Portal

4   Delete the InForm Portal physical directory (optional).

5   Drop the portal schema from the database (optional).

C H A P T E R  3

# InForm Portal configuration

## In this chapter

# Overview of configuring the InForm Portal application

Configuring the InForm Portal application means setting up the InForm Portal application to look like and perform to your specifications. The Configuration Administrator is the only InForm Portal user who can configure the InForm Portal application. This user must be an InForm user who has the right to modify user information in the InForm application.

The Configuration Administrator should be set up when the InForm Portal application is set up. For multilingual studies, you should set up one Configuration Administrator for each product locale for the study.

For more information, see *Step 2: Set up the Configuration Administrator* (on page 11).

Before you configure the InForm Portal application, be sure that the following are true.

- The Configuration Administrator account has the right to modify user information in the InForm application.

- The InForm Portal application is assigned as the Home page that appears when the Configuration Administrator logs into the InForm application.

- If applicable, the Home page contains the correct logo and information for the study.

  For more information, see *Step 3: Customize the InForm Portal Home page* (on page 13).

## About the Configuration Administrator

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

- *Logs in as the Configuration Administrator using the account that was set up when the InForm Portal application was installed* (on page 20).

- *Assigns Portal Administrator rights* (on page 20).

- *Creates and names tabs* (on page 21).

- *Designates the InForm Portal application as the Home page for Portal Administrators* (on page 21).

- *Enables or disables the viewing of audit trails* (on page 22).

- *Updates the InForm Portal database credentials* (on page 22).

  Optional.

- *Edits the rights of Portal Administrators* (on page 23).

  Optional.

- *Disables Portal Administrators* (on page 23).

  Optional.

- *Sets up key contacts* (on page 31).

  Optional. Can also be done by a Portal Administrator.

- *Customizes the InForm Portal colors* (on page 37).

  Optional. Can also be done by a Portal Administrator.

# Tab types and InForm Portal pages

The following tabs are generic to most InForm Portal applications.

| Tab type | Restrictions | Attributes |
|---|---|---|
| Config Admin | Can only be viewed by the Configuration Administrator. | Displays the rights assigned to the Portal Administrators.<br><br>Allows the Configuration Administrator to add or edit Portal Administrators and their rights, and to configure the InForm Portal application. |
| Admin | Can only be viewed and edited by Configuration Administrators and Portal Administrators.<br><br>The page displays only the functions assigned to the administrator. | Allows the Configuration Administrator or Portal Administrators to upload and update documents; manage sections, tabs, and tab order, and specify InForm Portal colors. |
| Home | The text on the Home page can only be changed by a Portal Administrator with sufficient privileges. Logo changes can only be made by the Configuration Administrator. | The HTML document (homedefault.html) is stored in the virtual directory associated with the InForm Portal application in the views/display folder. The logo (company_logo.gif) is stored in the images folder.<br><br>The HTML document displays inline, meaning that the contents of the document (and not a link to the document) are displayed.<br><br>This page is available to all end users who have the InForm Portal application assigned as their Home page.<br><br>This tab can be renamed and deactivated. |
| Contacts | Only the Configuration Administrator or a Portal Administrator with the right to modify user information in the InForm application can designate the users that appear on this page. | Displays a table containing the contact information for users marked **Public** in the InForm database.<br><br>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.<br><br>This tab can also be renamed and deactivated. |

| Tab type | Restrictions | Attributes |
|---|---|---|
| Documents | A section must be defined within a tab before a document can be uploaded to this page.<br><br>In order for the section heading to appear under the specified tab, at least one document must be associated with the section. | The documents are stored in the InForm Portal database. This page can list Microsoft Word, Microsoft Excel spreadsheet software, Microsoft PowerPoint, and Microsoft Project files; Adobe Acrobat (PDF) files; HTML (web) pages; and JPEG and GIF files.<br><br>You can upload the same document with up to three different file extensions at one time.<br><br>An HTML document can be uploaded to appear directly in the browser.<br><br>The default Document tab is called Tab 1.<br><br>The tab can be renamed and deactivated. |
| Help | Help can be edited only by the Configuration Administrator and Portal Administrators with sufficient rights. | Displays the names of the tabs for the InForm Portal application, along with their descriptions, as well as information about file formats and how to contact Oracle if you need assistance.<br><br>You can create a web page that contains study-specific help by uploading an HTML file (web page) that contains the text you want to display on the Help tab. Do not include header tags in the HTML file.<br><br>This page is available to all end users who have the InForm Portal application assigned as their Home page.<br><br>The tab can be renamed and deactivated. |

## Considerations for working with tabs

The Configuration Administrator for a locale is the only user who should have the right to add tabs to the InForm Portal application. All administrators (Configuration Administrators and those Portal Administrators who have the appropriate rights) can edit the names of tabs, add sections to tabs, and activate, deactivate, and change the order of tabs.

When working with tabs, keep the following in mind:

• The sponsor restricts the number of tabs that appear in any given InForm Portal application.

> **Note:** The InForm Portal application allows a maximum of 13 tabs in the InForm Portal application, including the Config Admin and Admin tabs, for each product locale.

• Additions must be authorized through the appropriate business channels.

- After a tab name is created, that tab name always appears on the Edit Tab page.

  - The tab can then be activated or deactivated as necessary.

  - Tab names remain on the list of tab names and can never be deleted.

- You can only upload a document to a section within a tab.

  - You must specify a section in order to upload a document.

  - The tab page associated with a tab name does not appear in the user interface until there is content on the page.

# Document audit trails

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 file to be seen by hiding all the older files.

- Display all of the 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 *Enabling the display of document audit trails* (on page 22).

# Configuring the InForm Portal application

Perform the following procedure for each product locale for which the study is configured. The best way to do this is to set up a Configuration Administrator for each product locale. When a Configuration Administrator logs in to the InForm Portal application, the tabs for that locale appear. The Configuration Administrator can then perform all of the setup activities for the locale.

## Accessing the InForm Portal application as the Configuration Administrator

The InForm Portal application is integrated with an InForm study, so the InForm Portal application appears in the InForm content pane.

1    Open an Internet browser.

2    Type the URL for your study, and press **Enter**.

The log in page appears.

3    Log in as the Configuration Administrator.

For more information, see *Step 2: Set up the Configuration Administrator* (on page 11).

The InForm Portal application appears as a pane with tabs running along the top.

The tabs serve as the first level of organization for the content of the InForm Portal application.

The InForm Portal application displays the Config Admin tab by default.

- **Options in the left column** are used to set up Portal Administrators, assign rights to the Configuration Administrator and the Portal Administrators, and set the audit trail status.

- **Admins table** shows the rights assigned to the Configuration Administrator and the Portal Administrators that are set up for the InForm Portal application.

- **Audit Trail Status** indicates whether sponsor and user audit trails are enabled.

## Assigning Portal Administrator rights

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

1    In the InForm Portal application, click the **Config Admin** tab.

2    In the **Config Options** section, click **Add Portal Admin**.

A drop-down list with the names of all InForm users who have access to the InForm Portal application appears.

3    In the **InForm User** field, select the name of the user to which you want to assign Portal Administrator rights.

4    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 *User roles and rights for accessing the InForm Portal*

*application* (on page 3).

> **Note:** Oracle recommends that you do not give Portal Administrators the right to add tabs. This right should be reserved for the Configuration Administrator.

5  Click **Submit**.

6  To view the updates, on the **Config Admin** page, click **Refresh**.

## Creating and naming a tab

Only a Configuration Administrator can create and name the tabs that appear in the InForm Portal application.

For more information, see *Considerations for working with tabs* (on page 18).

> **Note:** The InForm Portal application allows a maximum of 13 tabs, including the **Config Admin** and **Admin** tabs, for each product locale.

1  Log in to the InForm application as the Configuration Administrator.

2  In the InForm Portal application, select the **Admin** tab.

3  In the **Add New Records** section, click **Tabs**.

   A list of the existing tabs appears, followed by the New Tab definition box.

4  Complete the following fields:

   • **New Tab**—Name that you want to appear on the tab.

   • **Sponsor Tab**—Allow only sponsor users to see this tab.

   • **Description**—Brief description of the contents of the tab.

5  Click **Submit**.

6  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 28).

## Designating the InForm Portal application as the Home page

An administrator designates the InForm Portal application as the Home page for the Configuration Administrator.

The Configuration Administrator performs this procedure for every Portal Administrator.

Portal Administrators perform this procedure for every InForm user who should have access to the InForm Portal application.

To perform this procedure, Portal Administrators must have the InForm Portal application assigned as their Home page and must also have the InForm right to change a user's attributes.

1  Log in to the InForm application.

2    In the InForm navigation toolbar, click the Admin (   ) icon.

3    Click **Users**.

4    Click the **First Name**, **Last Name**, or **Account Name** link of 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 user record.

6    In the **Home Page** field, type the path to the InForm Portal Home page (for example, **./Portal/default.htm**).

7    Select the Product Locale.

This determines the language for the InForm Portal pages.

8    Click **Submit**.

## Enabling the display of document audit trails

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

For more information, see *Document audit trails* (on page 19).

1    Log in to the InForm application as the Configuration Administrator.

2    In the InForm Portal application, select the **Config Admin** tab.

3    In the **Config Options** section, click **System Config**.

4    To view the audit trail for sponsor-only documents, in the **Sponsor Audit Trail** field, select **Enabled**.

5    To view the audit trail for all documents, 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 next to the document name. To collapse the document history so that only the most recent version of the document is visible, users can click the - (minimize) button.

## Updating the InForm Portal database credentials

To change the InForm Portal user name or password, you can edit the database credentials for the InForm Portal database.

1    Use a text editor to edit the **ChangePortalDBConnectionString.xml** file as follows:

```
<ChangePortalDBConnectString>
  <Trial Name><Study Name></Trial Name>
  <OldConnectionStr>
    <Username><Previous InForm Portal User Name></User Name>
    <Password><Previous InForm Portal Password></Password>
    <Source><Oracle Connect String></Source>
  <OldConnectionStr>
  <NewConnectionStr>
    <Username><InForm Portal User Name></Username>
    <Password><InForm Portal Password></Password>
```

```
        <Source><Oracle Connect String></Source>
      </NewConnectionStr>
    </ChangePortalDBConnectString>
```

2　　Save the **ChangePortalDBConnectionString.xml** file.

3　　Select **Start > Run**.

4　　Type **cmd**.

5　　Click **OK**.

　　　A Command Prompt window appears.

6　　Type the following:

```
PortalConfig.exe -updv ChangePortalDBConnectionString.xml
```

7　　Press **Enter**.

> **Note:** To maintain application security, you should delete the
> ChangePortalDBConnectionString.xml file after you change the database credentials.

## Editing the rights of a Portal Administrator

To increase or limit the authority of a Portal Administrator, the Configuration Administrator can change the rights assigned to the Portal Administrator.

1　　Log in to the InForm application as the Configuration Administrator.

2　　In the InForm Portal application, select the **Config Admin** tab.

3　　In the **Config Options** section, click **Edit Portal Admin**.

4　　To the right of the name of the Portal Administrator you want to edit, click **Edit**.

5　　Select or deselect the rights for this Portal Administrator.

6　　Click **Submit**.

## Disabling a Portal Administrator

1　　Log in to the InForm application as the Configuration Administrator.

2　　In the InForm Portal application, select the **Config Admin** tab.

3　　In the **Config Options** section, click **Edit Portal Admin**.

4　　To the right of the name of the Portal Administrator you want to edit, click **Edit**.

5　　In the **Active** field, select **No**.

6　　Click **Submit**.

# C H A P T E R  4
# InForm Portal administration

## In this chapter

# Overview of administering a portal

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

- *Designating the InForm Portal application as the Home page* (on page 21).

- *Renaming tabs* (on page 28).

- *Reordering tabs* (on page 28).

- *Adding sections to tabs* (on page 29).

- *Editing section properties* (on page 29).

- *Activating or deactivating tabs* (on page 30).

- *Setting up key contacts* (on page 31).

- *Uploading documents* (on page 33).

- *Updating documents* (on page 34).

- *Customizing the InForm Portal colors* (on page 37).

# About the Admin tab

The Configuration Administrator and Portal Administrators have rights to view the Admin tab. The options available on this page allow administrators to modify and build 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 *User roles and rights for accessing the InForm Portal application* (on page 3) and *Assigning Portal Administrator rights* (on page 20).

## Admin tab options

| Heading | Use to do this |
| --- | --- |
| Add New Records | • Add a new tab.<br><br>**Note:** Oracle recommends that this option be available only to the Configuration Administrator.<br><br>• Add a new section to a tab.<br><br>• Upload a document.<br><br>• Format the page color. |
| Edit Records | • Edit section names.<br><br>• Edit tab names.<br><br>• Rearrange the order of tabs.<br><br>• Update a document. |
| Help | • View information on working with the InForm Portal application. |

# Working with tabs and sections

The Configuration Administrator for a locale is the only user who should have the right to add tabs to the InForm Portal application. All administrators (Configuration Administrators and those Portal Administrators who have the appropriate rights) can edit the names of tabs, add sections to tabs, and activate, deactivate, and change the order of tabs.

Tabs are the first level of organization for the content of the InForm Portal application. You may decide to designate:

* One tab for white papers.

* One tab for key contacts.

* One tab for news.

Each tab can be further organized into sections. For example, white papers might be separated into groups based on category of information.

When adding a section to a tab, consider the following.

* Understand the focus and information needs of the audience.

* Select the most appropriate tab.

* Organize the documents logically.

* Name the tabs, sections, and documents descriptively.

You can create a section and add documents to it, but keep the information hidden from users until you are ready to release it.

For more information, see:

* *Tab types and InForm Portal pages* (on page 17).

* *Considerations for working with tabs* (on page 18).

* *Adding a section to a tab* (on page 29).

## 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 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 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.

> **Note:** Do not include spaces in section names.

- Consider the focus and information needs of the audience.

> **Note:** When you set up a section, the title does not appear on the tab until a document has been uploaded to that section.

1   In the InForm Portal application, select the **Admin** tab.

2   In the **Add New Records** section, click **Sections**.

    The Add New Section page appears.

3   Complete the following fields:

   - **New Section**—Name of the section.

   - **Description**—Information about the section that will appear below 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**.

# Setting up key contacts

Administrators can set up a tab containing email links and other information to help study participants reach key contacts.

1   In the InForm navigation toolbar, click the Admin (  ) icon.

2   Click **Users**.

3   Click the **First Name**, **Last Name**, or **Account Name** link of the person you want to designate as a key contact.

   The User details page appears.

4   Verify that the phone number and email fields contain data.

5   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 that has at least one section must exist before you can upload a document to it.

For more information, see *Creating and naming a tab* (on page 21) and *Adding a section to a tab* (on page 29).

> **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 spreadsheet software.

- 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) and Microsoft (www.microsoft.com).

| Document property | Information required for uploading a document |
| --- | --- |
| Tab | Name of the tab on which you will place the document. |
| Section | Name of the section on which you will place the document. **Note:** 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 the InForm Portal users. **Note:** You can change this property at any time. For more information, see *Editing document properties* (on page 34). |
| 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. **Note:** The RefName for a document cannot be changed. |

| Document property | Information required for uploading a document |
|---|---|
| Visibility to users Y/N | Whether the document should be visible to InForm Portal users when it is uploaded.<br><br>**Note:** You can change this property at any time.<br><br>For more information, see *Editing document properties* (on page 34). |
| Sponsor only Y/N | Whether the document should be viewed by all users or only by sponsor users.<br><br>**Note:** You can change this property at any time.<br><br>For more information, see *Editing document properties* (on page 34). |
| Format | Format(s) for the document. Consider how your users will use the document and what software they have for:<br><br>• **Downloading and editing**—Make the document available in Microsoft Word, Microsoft PowerPoint, Microsoft Excel spreadsheet software, or Microsoft Project.<br><br>• **Downloading and printing**—Make the document available in Adobe Acrobat (PDF).<br><br>• **Viewing online**—Make the document available in HTML. |

# Uploading a document

1 In the InForm Portal application, select the **Admin** tab.

2 In the **Add New Records** section, click **Upload Documents**.

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.
>
> The InForm Portal application does not support embedded graphics in HTML documents.

• **Title**—Title of the document.

• **Ref Name**—Unique identifier (up to 150 English characters or 40 Japanese 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 appear in this drop-down list.

• **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.

> **Note:** For IIS 7.5, the maximum file size is set to 4 MB by default. The setting can be resized up to 30 MB by editing the web.config file. Add following element to the <system.web> node: **<httpRuntime maxRequestLength="*x*">** to specify the file size in kilobytes. For example, if you wanted to increase the maximum file size to 8 MB, the entry would be: **<httpRuntime maxRequestLength="8192">**.

4  To add more formats of the same document, repeat steps 2 to 3.

5  Click **Submit**.

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

## 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.

1  In the InForm Portal application, select the **Admin** tab.

2  In the **Edit Records** section, click **Update Documents**.

The Tab Name drop-down list 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. It lists the name of the file uploaded, the size and type of the file, the estimated time required for a user to download the file, and the upload status.

## 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 list 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**.

# 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 would have no significance to site users.

You can control access to published documents by:

- *Making a document invisible* (on page 36).
- *Restricting document access to sponsor users* (on page 36).

## Making a document invisible

1  In the InForm Portal application, select the **Admin** tab.

2  In the **Add New Records** section, click **Upload Documents**.

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 34).

## Restricting document access to sponsor users

You can limit the audience for a document by putting the document on a tab that has been designated for sponsors only. When the tab is marked sponsor-only, the documents uploaded to the tab are visible only to users who are marked as sponsors.

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**.

# Customizing the portal colors

## InForm Portal page colors

The Configuration Administrator and Portal Administrators can define the colors for the following areas:

- **The left page bar**—Vertical bar of color that runs along the left edge of the InForm Portal window.

- **The section bar**—Horizontal bar that provides background for the section headings on a tab.

- **The section text**—Color of the title text in the section heading.

## Specifying colors

1 In the InForm Portal application, select the **Admin** tab.

2 In the **Add New Records** section, click **Format Page Color**.

The following color choice groups appear:

- Internet Safe Colors

- Gray Scale Colors

- Standard Colors

> **Note:** You can also specify the hexadecimal (hex) value of a color in the Hex value field.

3 Select a color for the left page bar

4 Click **Next**.

5 Select a color for the section bar.

6 Click **Next**.

7 Select a color for the section text.

8 Click **Next**.

9 To save the changes, click **Update**.

10 To see your color choices as they appear in the InForm Portal application, select any tab.