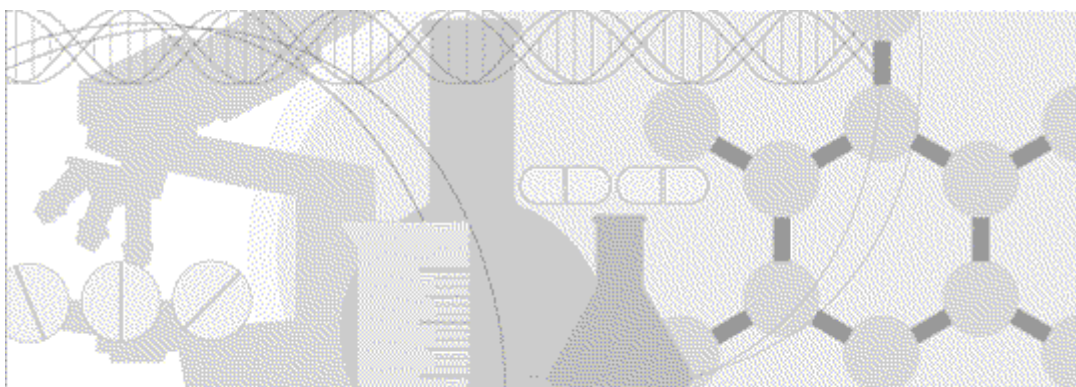


Upgrade and Migration Guide

Oracle[®] Health Sciences InForm 6.1.0.1



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 software for use with the Reporting and Analysis module.

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 software for use with the Reporting and Analysis module.

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 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 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>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>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 software for use with the Reporting and Analysis module.
<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>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>	The <i>User Guide</i> provides an overview of the InForm application including details on multilingual studies, how to navigate through the user interface, how to manage a study-specific Home page with the InForm Portal application, and how to accomplish typical tasks you perform while running a clinical study.
<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 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.

Document	Description
<i>Reporting Database Schema Guide</i>	The <i>Reporting Database Schema Guide</i> describes the Reporting and Analysis database schema, and provides information on creating Reporting Database Extracts (RDEs).
<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"> • PFConsole utility • MedML Installer utility • InForm Data Import utility • InForm Data Export utility • InForm Performance Monitor utility • InForm Report Folder Maintenance utility <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>
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"> • Customer-defined database (CDD) • Name value pairs <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>
<i>Clinical Data API Guide</i>	The <i>Clinical Data API Guide</i> provides information about submitting data to the InForm application in InForm ODM format.
<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.

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 information and patches on My Oracle Support

The latest information about the InForm application is on the Oracle Support self-service website, My Oracle Support. Before you install and use the InForm 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 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

Upgrading and migrating to the InForm

6.1.0.1 release

In this chapter

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Requirements for the InForm studies you can migrate	3
Hardware and software requirements for the InForm 6.1.0.1 release.....	4

Overview of upgrading and migrating to this release

You can perform a new installation of the InForm 6.1.0.1 software, or you can upgrade and migrate to the InForm 6.1.0.1 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**—Use to upgrade to the Oracle 11g database software.
For more information, see *Upgrading the database environment* (on page 5).
- **Migrate the InForm studies**—Use to upgrade to the InForm 6.1.0.1 software from the InForm 4.6 SP2 release or later, or from any InForm 5.0, 5.5, 6.0, or 6.1 release using a series of scripts.

For more information, see *Upgrading and migrating the InForm studies* (on page 9).

- **Migrate the InForm Portal software**—Use to upgrade or migrate the InForm Portal software to the InForm 6.1.0.1 release.

For more information, see *Upgrading and migrating the InForm Portal software* (on page 31).

- **Upgrade the reporting environment (Optional)**—Use to upgrade your reporting environment for any InForm 4.6 SP2 studies or later, or for any InForm 5.0, 5.5, 6.0, or 6.1 studies using a series of scripts.

This step is required only if you are using the Reporting and Analysis module.

For more information, see *Upgrading and migrating the reporting environment* (on page 39).

Requirements for the InForm studies you can migrate

You can upgrade or migrate to the InForm 6.1.0.1 release from the InForm 4.6 SP2 release or later, or from any InForm 5.0, 5.5, 6.0, or 6.1 release.

There are no limitations on upgrading or migrating studies from any InForm 6.1 release.

If you are upgrading or migrating from any InForm 5.0, 5.5, or 6.0 release, the Central Designer project for each study must be updated to the Central Designer 2.1 release. A new automated deployment must be sent to the InForm application to update each study. For more information, see ***Create the Central Designer 2.1 study deployment*** (on page 22), and the Central Designer *InForm Design Guide*. Other than updating the Central Designer project, there are no limitations on upgrading or migrating studies from any InForm 5.0, 5.5, or 6.0 release.

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 6.1.0.1 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 6.1.0.1 release

Before upgrading and migrating to the InForm 6.1.0.1 release, review the hardware and software requirements in the *Release Notes*.

CHAPTER 2

Upgrading the database environment

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Overview of upgrading the database environment

If you are upgrading to the InForm 6.1.0.1 release from an environment that uses the Oracle 10g database software, you must upgrade to 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 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 10g database to the Oracle 11g database software. You must export studies from an Oracle 10g environment, import them into an Oracle 11g environment, and then proceed with the rest of the upgrade.

Upgrade to a new Oracle database environment

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

For more information, see your Oracle database documentation.

CHAPTER 3

Upgrading and migrating the InForm studies

In this chapter

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Preparing to upgrade or migrate the InForm software and 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 11).
 - *Query length limitations* (on page 12).
 - *Oracle 11g database import recommendations* (on page 12).
 - *Rights assigned to right groups* (on page 13).
 - *Itemset types and migrated studies* (on page 13).
 - *Imported child controls and migrated studies* (on page 13).
 - *Changed resource files* (on page 14).
- 2 *Create backup files* (on page 18).
- 3 Back up the InForm study database:
 - *Back up the InForm study database—Oracle 10g* (on page 19).
 - *Back up the InForm study database—Oracle 11g* (on page 20).
- 4 *Export and modify the InForm study database* (on page 21).
- 5 *Create the Central Designer 2.1 study deployment* (on page 22).

Note: This step is not required if you are upgrading from any InForm 6.1 release.

Considerations before you migrate

Database and file customizations

- 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 6.1 schema at the point in the migration where you create the review schema. For more information, see *Import the InForm study DMP file* (on page 25).

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, pfdadmin RECREATEREVIEWSCHEMA fails. You must repair any invalid schema objects before you can rerun pfdadmin 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 6.1 software and InForm 6.1 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 6.1.0.1 release might cause issues with table column widths, which, if not fixed, can result in data being truncated.

- For standard InForm database tables, running the **ExportMigrationFiles.cmd** automatically fixes any column width differences. You run this command when you *Export and modify the InForm study database* (on page 21).
- For customized database tables, you must manually increase the table column widths to accommodate the increase in Unicode character width before you run the **ExportMigrationFiles.cmd**.

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 6.1.0.1 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.

Oracle 11g database import recommendations

Oracle recommends the following when importing previously exported studies into an 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 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 11g database.
- Set **grants=N** for the import.

If you set **grants=Y**, grants to the streams proxy user from 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.

Rights assigned to right groups

Before upgrading, review and record the rights assigned to each rights group. This information is on the Rights Group detail page in the Admin user interface. For more information, see the *User Guide*. Make sure the rights are correctly assigned for each rights group.

After the upgrade is complete, you use this information to verify that the rights assigned to each rights group are correct. In some cases, the rights assigned to each rights group may not be correct after the upgrade.

Note: This issue can occur only when you upgrade studies from any InForm 4.6 SP2 or earlier release, or any InForm 5.0 release. This issue does not occur when you upgrade studies from any InForm 4.6 SP3 or later release, or from any InForm 5.5, 6.0, or 6.1 release.

For more information, see *Verify the rights assigned to each rights group* (on page 30).

Itemset types and migrated studies

Two types of itemsets are now available for submitting multiple rows of data on a form at one time: Add Entry itemsets and Repeating Data itemsets.

These itemsets have attributes that are configured during study design. The display and behavior of the itemsets differ in the InForm application depending on the type. Both itemset types can appear on the same form.

Itemsets created in releases prior to the InForm 6.0 release behave as Add Entry itemsets in the InForm 6.1.0.1 release.

For more information on itemset types, see the *User Guide*.

Imported child controls and migrated studies

In the InForm 6.1.0.1 release, the InForm Data Import utility does not allow the import of dynamic child controls when the parent is not selected.

In releases prior to the InForm 6.0 release, you could use the InForm Data Import utility to import child controls when the parent control was not selected. As a result, if you migrate a study with imported child control data into the InForm 6.1.0.1 release, when a form loads, the dynamic control functionality correctly hides child controls with unselected parent controls, but it does not clear the data in the child controls.

For more information on dynamic control functionality, see the *User Guide*.

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. For more information, see the *Utilities Guide*.

Files updated in the InForm 6.1.0.1 release

... \XMLBase

sysVolume.xml

... \XMLBase \Help

Version.htm

Files updated in the InForm 6.1 release

... \Resources \enu

calendar.js

ContextMenu.html

ControlPanelNoFrame.html

CRBViewFrame.html

CRBViewTitle2NoFrame.html

CRBViewTitleNoFrame.html

CRFFrame.html

DocTabControl.html

EQACFrame.html

EQACFrameset.html

EQACQueryFrame.html

ExternalLoginWindowClose.html

FORGOTPWD.HTML

GenericTitle.html

Login.html

mainstyles.css

MonitorFrame.html

MONITORTITLE.HTML

MultiPage.html
pfscript.js
QueryListTitle2NoFrame.html
resetpwdnotification.txt
resources_template.xml
ScreeningLogTitle.html
SETitle.html
signingtitle.html
TabControl.html
TabControlframe.html
TEViewTitleNoFrame.html
Top_Reauth.js
TopFrameset.html
UserAdminTitle.html
VisitBar.css
visitbar.html
visitsidebar.html
XferViewTitle2NoFrame.html
...\Resources\enu\Templates
PDFPage.xsl
...\XMLBase
core_AdminDBTrl.XML
core_GroupTypes.xml
core_Rights.xml
core_RightsGroups.xml
core_SystemConfig.xml
core_SystemConfigThing.xml
core_Users.xml
core_UserType.xml
default_RightsGroups.xml
QueryFormText.xml
syscore.rsp

sysform_AdminDBTrl.XML
sysform_AdminUserNew.xml
sysform_GroupEditProp.xml
sysform_GroupType.xml
sysform_ItemsetRowComment.xml
sysform_Password.xml
sysform_RightsEdit.xml
sysform_Rule.xml
sysform_Site.xml
sysform_SystemConfig.xml
sysform_SystemInfo.xml
sysform_UserType.xml
sysVolume.xml
sysVolume.xmltmpl
UpgradeTrialResources.rsp
..\XMLBase\Help
Version.htm

New files in the InForm 6.1 release

..\Resources\enu
emailchangenotification.txt
RESETPWD.HTML
RESETPWDMSG.HTML
resetpwdreminder.txt
..\XMLBase
core_autocalc_User.xml

Files removed in the InForm 6.1 release

..\Resources\enu

builder.js

controls.js

dragdrop.js

effects.js

FORGOTPWDCORRECT.HTML

motionpack.js

prototype.js

scriptaculous.js

slider.js

..\XMLBase

core_Listings.xml

core_Randomization.xml

sysform_AdvancedConnectionSettings.xml

sysform_ConnectionSettings.xml

sysform_DefaultAdvancedConnectionSettings.xml

sysform_DefaultConnectionSettings.xml

sysform_EventAdd.xml

sysform_Listings.xml

UAUM_Users.xml

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 Run the **reg export** command to export the InForm Windows registry entries to a text file.

- For InForm 4.6, 5.0, or 5.5 releases, use the following syntax:

```
reg export "HKEY_LOCAL_MACHINE\SOFTWARE\Phase Forward" backupkeys.txt
```

- For InForm 6.0 or 6.1 releases, use the following syntax:

```
reg export "HKEY_LOCAL_MACHINE\SOFTWARE\OracleHS" backupkeys.txt
```

You will use the information exported to **backupkeys.txt** to set registry entries on the InForm 6.1.0.1 application server.

For more information, see *Make updates to the Windows registry settings* (on page 25).

- 4 Back up **key.txt** file, located in the <InstallationDirectory>\InForm\Bin\DBOra folder.

If it is not located in the DBOra folder, it is in the folder listed in the following registry entry: `HHKEY_LOCAL_MACHINE\SOFTWARE\OracleHS\InForm\ScriptsOracle`

Note: This step is required only if you are upgrading from any InForm 6.0 or 6.1 release.

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

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

- 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.

Back up the InForm study database

Back up the InForm study database—Oracle 10g

If you are migrating an InForm 4.6 or InForm 5.0 study from an Oracle 10g database, 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 6.1.0.1 release. For more information, see *Import the InForm study DMP file* (on page 25).

To back up an InForm 4.6 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>
/accountparams:"<path_to_parameter_file>"
```

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.
- **/accountparams:path_to_paramter_file**—Includes the path to a text file that contains the following parameters:
 - **trial_user**=Owner of the InForm study database schema.
 - **trial_user_password**=Password for the owner of the InForm study database schema.

If the accountparams option is not specified, the command prompts for the required user names and passwords.

Example:

```
ExportDBUpgrade.cmd D:\PFST46.dmp TRIAL1
/accountparams:"e:\scripts\exparams.txt"
```

The ExportDBUpgrade command creates a log file **<DMP_file>.log** in the current directory.

Back up the InForm study database—Oracle 11g

If you are migrating an InForm 4.6, 5.5, 6.0, or 6.1 study from an Oracle 11g database, 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 6.1.0.1 release. For more information, see *Import the InForm study DMP file* (on page 25).

To back up an InForm 4.6, 5.5, 6.0, or 6.1 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 <InstallationDirectory>\InForm\bin\DBOra 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>
```

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.

Note: Do not include spaces in the directory path to the DMP file.

- **DMP_File_Name**—Name of the DMP file to export.

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

You are prompted for the following values:

- **orasystem_user**—Name of the Oracle database system user.
- **orasystem_user_pass**—Password for the Oracle database system user.
- **trial_user**—Name of the study database schema owner.
- **trial_user_pass**—Password for the owner of the study database schema.

You can also pass the parameters by using the **/accountparams:"path_to_parameter_file"** command option.

When specified, this option includes the path to a text file that contains the values required to run the command. The format of the parameter file is parameter=value. There is a new line for each parameter, and there are no spaces on a line.

For example:

```
ExportDB.cmd trial11 /u01/app/oracle/dp_export pfst55.dmp
```

The ExportDB command creates the log file <DMP_File>.log.

Export and modify the InForm study database

The `ExportMigrationFiles` command creates and modifies the database, and creates the following migration files:

- `<dump_file_name>.dmp`—The dump file name specified on the command line. The dump file is located in the specified directory on the InForm database server.
- `pfadmin_view_service.txt`—Text file containing the information for the servers and studies running on the InForm application server.
- `InForm.reg`—The contents of the InForm registry entry exported from:
 - `HHKEY_LOCAL_MACHINE\SOFTWARE\PhaseForward` (InForm 4.6, 5.0, or 5.5 studies).
 - `HHKEY_LOCAL_MACHINE\SOFTWARE\OracleHS` (InForm 6.0 or 6.1 studies).

Note: After you run the `ExportMigrationFiles` command, you cannot use the study database with an older version of the InForm application.

To export and modify the InForm study database:

- 1 Copy the `InForm\InstallSupport` folder from the downloaded product image to the InForm application server.
- 2 Run `ExportMigrationFiles.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:

```
ExportMigrationFiles.cmd <TNS_Service_Name>
```

where:

TNS_Service_Name—TNS name for the database instance.

You are prompted for the following values:

- **Trial user ID**—Owner of the study database schema.
- **Trial user password**—Password for the owner of the study database schema.
- **Oracle system uid**—Oracle database system user.
- **Oracle system user password**—Password for the Oracle database system user.
- **Oracle sys uid**—Oracle database sys user.
- **Oracle sys password**—Password for the Oracle database sys user.
- **Dump file directory path**—Location of the directory that you created on the InForm database server.
- **Dump file name**—Name of the DMP file to export.

Note: Do not include spaces in the dump file name or the directory path to the dump file.

You can also pass the parameters by using the `/accountparams:"path_to_parameter_file"` command option.

When specified, this option includes the path to a text file that contains the values required to run the command. The format of the parameter file is `parameter=value`. There is a new line for each parameter, and there are no spaces on a line. For more information, see the *Installation Guide*.

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.

Create the Central Designer 2.1 study deployment

Note: This step is not required if you are upgrading from any InForm 6.1 release.

The InForm 6.1.0.1 software requires a new Central Designer 2.1 rules engine for any InForm 4.6 SP2 release or later, or any 5.0, 5.5, or 6.0 release. If you are upgrading or migrating to the InForm 6.1.0.1 release from any of these releases, the Central Designer project for each study must be updated to the Central Designer 2.1 release. A new automated deployment must be sent to the InForm application to update each study.

For more information, see the Central Designer *InForm Design Guide*.

Note: For each study being updated, make sure all the languages in the original study are selected.

Migrating InForm studies to a new machine

You can migrate any supported InForm 4.6, 5.0, 5.5, 6.0, or 6.1 study to a new machine.

Note: Depending on the InForm version you are migrating from, some steps may not be required.

- 1 *Install and configure the InForm 6.1.0.1 software* (on page 24).
- 2 *Copy the backup files to the InForm 6.1.0.1 application server* (on page 24).
- 3 *Make updates to the Windows registry settings* (on page 25).
- 4 *Import the InForm study DMP file.* (on page 25)
- 5 *Set the locale for InForm 4.6 sites and users* (on page 27).

Note: This step is required only if you are upgrading from any InForm 4.6 studies.

- 6 *Create tablespaces other than INFORM* (on page 27).
- 7 *Set up InForm customer-defined databases* (on page 28).
- 8 *Install and configure the skeletal study* (on page 28).

Note: This step is not required if you are upgrading from any InForm 6.1 release.

- 9 *Install the Central Designer certificate* (on page 28).
- 10 *Schedule the Central Designer automated deployment* (on page 29).

Note: This step is not required if you are upgrading from any InForm 6.1 release.

- 11 *Perform the final study configuration* (on page 29).
- 12 *Install or upgrade the InForm Adapter software* (on page 29).
- 13 *Start the InForm studies* (on page 29).

Install and configure the InForm 6.1.0.1 software

Note: Before you install the InForm 6.1.0.1 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.

On the Database Configuration page:

- Select the **Install Admin DB** option.
- Select the **Prep Oracle** option.

For more information, see the *Installation Guide*.

Copy the backup files to the InForm 6.1.0.1 application server

- If you are migrating to a new database server, copy the InForm study database DMP file to the new database server.
- Copy any customizations to the InForm application server so they can be introduced after migration.

For more information, see *Create backup files* (on page 18).

- Copy any non-InForm tablespaces to the database server.

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

- Copy **key.txt** to the <InstallationDirectory>\InForm\Bin\DBOra folder.

If your database scripts are not in the default location, copy **key.txt** to the folder listed in the HKEY_LOCAL_MACHINE\Software\OracleHS\InForm\ScriptOracle key.

Note: This step is required only if you are upgrading from any InForm 6.0 or 6.1 release.

- Copy the **backupkeys.txt** file you created when you exported the InForm registry settings so you can update the registry as needed on the InForm 6.1.0.1 application server.

For more information, see *Make updates to the Windows registry settings* (on page 25).

Make updates to the Windows registry settings

If you have any InForm Windows registry setting customizations that you need to apply to the InForm 6.1.0.1 software, you need to update the Windows registry on the InForm 6.1.0.1 application server.

For example, if your study suppresses the word **Unscheduled** from the title of an unscheduled form, you need to edit the **HKEY_LOCAL_MACHINE\Software\OracleHS\InForm** registry key **ShowUnscheduled** value to match the value you exported from your old InForm application server.

For more information, see *About registry key migration* (on page 52).

To evaluate what changes you should make:

- 1 Open **backupkeys.txt** in a text editor, such as Notepad.
- 2 Open the Registry Editor (regedit) to edit the Windows registry.
- 3 Compare the entries for each entry in **backupkeys.txt** to the entries in the InForm 6.1.0.1 application server, and make the necessary changes for your environment.

Import the InForm study DMP file

To import the InForm study DMP file:

- Run the **ImportMigrationFiles.cmd** (located in the `<InstallationDirectory>\InForm\Bin\DBOra` folder on the InForm application server), using the following syntax.

```
ImportMigrationFiles.cmd <TNS_Service_Name>
```

where:

TNS_Service_Name—TNS name for the database instance.

You are prompted for the following values:

- **InForm study name**—Enter the name of the InForm study you will create to import the DMP file.
- **InForm server name**—Enter the name of the InForm server to run the study.
- **Trial user ID**—Owner of the study database schema.
- **Trial user password**—Password for the owner of the study database schema.
- **Study locale ISO name**—For InForm 4.6 studies, enter en-US; for other InForm versions, enter an available study locale.
- **Oracle system uid**—Oracle database system user.
- **Oracle system user password**—Password for the Oracle database system user.
- **Oracle sys uid**—Oracle database sys user.
- **Oracle sys password**—Password for the Oracle database sys user.
- **InForm database administrator name**—The name for the InForm database administrator.

- **InForm database administrator password**—The password for the InForm database administrator.
- **Dump file directory path**—Location of the directory that you created on the InForm database server.
- **Dump file name**—Name of the DMP file to export.
- **Was dump file created with Oracle 9 or 10?**—Enter **Y** or **N**.
- **Upgrade from InForm version?**—Enter the version of the study you are migrating (4.6, 5.0, 5.5, 6.0, or 6.1).
- **Study type**—Enter a TrialType for your study. Options are LIVE, UAT, TRN, DEV, or QA.
- **Study approval**—Enter TRUE if your study requires deployment package approval, or FALSE if your study does not require deployment package approval.

Note: By default, Live and UAT studies require study approval.

- **Deployment backup folder**—Enter a path on the InForm database server that will be used for database recovery during study deployment. For example /u01/app/deploybackup.

Note: The folder must exist before you run the ImportMigrationFiles command.

- **Deployment service port**—Enter a port number for the Central Designer application to communicate with the InForm application server to transmit deployment packages.
- **Authentication service port**—Enter a port number for the InForm application server to authenticate users for the Reporting and Analysis module.
- **ODMSubmit service port**—Enter a port number for the Clinical Data API to exchange SOAP requests.

You can also pass the parameters by using the `/accountparams:"path_to_parameter_file"` command option.

When specified, this option includes the path to a text file that contains the values required to run the command. The format of the parameter file is `parameter=value`. There is a new line for each parameter, and there are no spaces on a line. For more information, see the *Installation Guide*.

The ImportMigrationFiles command imports the DMP file, upgrades study resources, recreates the review schema, and configures the InForm study. If you are importing a DMP file for an InForm 4.6 study, the ImportMigrationFiles command creates an UpgradeSitesAndUsers.xml file in the `<InstallationDirectory>\InForm\XMLBase` folder directory. You must edit this file to complete the migration process for an InForm 4.6 study.

For more information, see *Set the locale for InForm 4.6 sites and users* (on page 27).

Set the locale for InForm 4.6 sites and users

Note: This step is required only when you migrate InForm 4.6 studies to the InForm 6.1.0.1 release.

InForm 5.0, 5.5, 6.0, and 6.1 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 the InForm 6.1.0.1 release, these properties must be added to existing sites and users.

- 1 Open the **UpgradeSitesAndUsers.xml** file you created when you ran `ImportMigrationFiles.cmd`, 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.

- 2 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.

- 3 Ensure the XML file is well formed after the changes.
- 4 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 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).

After you successfully run the `UpgradeSitesandUsers` command, delete the `UpgradeSitesAndUsers.xml` file from `<InstallationDirectory>\InForm\XMLBase` folder.

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*.

Set up InForm customer-defined databases

- 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>
[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.
- [NoSchema]**—Indicates that no new CDD schema should be created during setup.

You are prompted for the following values:

- uid**—Owner of the study database schema.
- pid**—Password for the owner of the study database schema.

You can also pass the parameters by using the **/accountparams:***"path_to_parameter_file"* command option.

When specified, this option includes the path to a text file that contains the values required to run the command. The format of the parameter file is parameter=value. There is a new line for each parameter, and there are no spaces on a line.

Install and configure the skeletal study

Note: This step is not required if you are upgrading from any InForm 6.1 release.

- Install and configure the skeletal study.
Before you can deploy a study, you must set up the basic framework to hold your study design and data. This framework is called a skeletal study.

For more information, see the *Installation Guide*.

Install the Central Designer certificate

You must install a certificate on the InForm application server to verify that every deployment package you receive from the Central Designer server comes from a trusted source.

- Copy the certificate you retrieve from the Central Designer application to a folder on the InForm application server.
- Install the certificate using the Microsoft Management Console.

For more information, see the *Installation Guide*.

Schedule the Central Designer automated deployment

Note: This step is not required if you are upgrading from any InForm 6.1 release.

- Schedule a Central Designer deployment from the Central Designer application.

For more information, see the Central Designer *InForm Design Guide*.

Note: You may encounter one or more **Element already exists - elements cannot be changed** errors during the deployment of an InForm 4.6 study to the InForm 6.1.0.1 application. For a workaround, contact Oracle Global Support.

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*.

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>
```

Post-upgrade tasks

Clear the client-side browser caches

Clear the browser cache for the browser you are using to access the InForm application.

For more information, see the Internet Explorer, Apple Safari, Mozilla Firefox, or Google Chrome documentation.

Verify the rights assigned to each rights group

In some cases, the rights assigned to each rights group may not be correct after the upgrade.

Note: This issue can occur only when you upgrade studies from any InForm 4.6 SP2 or earlier release, or any InForm 5.0 release. This issue does not occur when you upgrade studies from any InForm 4.6 SP3 or later release, or from any InForm 5.5, 6.0, or 6.1 release.

- 1 After the upgrade is complete, verify that the rights assigned to each rights group are correct using the information you recorded before you upgraded your study.

This information is on the Rights Group detail page in the Admin user interface. For more information, see *Rights assigned to right groups* (on page 13) and the *User Guide*.
- 2 Update the rights for each rights group, as needed.

CHAPTER 4

Upgrading and migrating the InForm Portal software

In this chapter

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Overview of upgrading and migrating the InForm Portal database

Beginning with the InForm 6.1 release, the InForm Portal information is included in InForm study database.

Note: The InForm Portal users and rights have been changed in the InForm 6.1 release. As a result, the Portal Admin and Portal Config Admin users are no longer available. Before you upgrade the InForm Portal database, record the rights that these users were granted so that you can reassign them to new users. For more information, see *Assign portal rights to existing rights groups* (on page 37).

To upgrade the InForm Portal database, you run scripts that migrate your existing InForm Portal content to the study database, and then upgrade it to the current schema.

To migrate any supported InForm 4.6, 5.0, 5.5, 6.0, or 6.1 release to a new environment:

- 1 *Export the InForm Portal database* (on page 33).
- 2 *Import the InForm Portal DMP file* (on page 34).
- 3 *Assign portal rights to existing rights groups* (on page 37).

To upgrade any InForm 6.0 or 6.1 release in the same environment:

- 1 *Upgrade the InForm Portal database in an existing environment* (on page 38).
- 2 *Assign portal rights to existing rights groups* (on page 37).

Migrating to a new environment

Export the InForm Portal database

To export the InForm Portal database to a DMP file:

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

```
ExportPortalMigrationFiles.cmd <TNS_Service_Name>
```

where:

TNS_Service_Name—TNS name for the database instance.

You are prompted for the following values:

- **Portal user ID**—Owner of the InForm Portal database schema.
- **Portal user password**—Password for the owner of the InForm Portal database schema.
- **Oracle system uid**—Oracle database system user.
- **Oracle system user password**—Password for the Oracle database system user.
- **Dump file directory path**—Location of the directory that you created on the InForm database server.
- **Dump file name**—Name of the DMP file to export.

Note: Do not include spaces in the dump file name or the directory path to the dump file.

You can also pass the parameters by using the `/accountparams:"path_to_parameter_file"` command option.

When specified, this option includes the path to a text file that contains the values required to run the command. The format of the parameter file is parameter=value. There is a new line for each parameter, and there are no spaces on a line.

The ExportPortalMigrationFiles command creates the following file:

- `<dump_file_name>.dmp`—The dump file name entered on the command line. The dump file is located on the InForm database server in the directory entered on the command line.

Import the InForm Portal DMP file

To import the InForm Portal DMP file:

- 1 Create a SQL script with the following content:

```
CREATE TABLESPACE InFormPortal_&1
DATAFILE '&2\InFormPortal_&1..dbf' SIZE 20M
AUTOEXTEND ON NEXT 10M Maxsize 150M
DEFAULT STORAGE( INITIAL      1M
                  NEXT        1M
                  MINEXTENTS  1
                  MAXEXTENTS  UNLIMITED
                  PCTINCREASE 1);
Exit;
```

- 2 Name the script **InFormPortal_TS.sql**, and save it in the `<InstallationDirectory>\InForm\Bin\DBOra` folder.
- 3 Log into SQLPLUS as the **sysdba** user, and run **InFormPortal_TS.sql** using the following syntax:

```
@InFormPortal_TS.sql <studyname> <physical_path_to_oracledata_folder>
```

For example:

```
@InFormPortal_TS.sql pfst55 /u01/app/oracle/oradata
```

- 4 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>
```

where:

- **TNS_Service_Name**—TNS name for the database instance.

You are prompted for the following values:

- **pfdbauid**—InForm database admin user.
- **pfdbapid**—InForm database admin password.
- **trial_user**—Owner of the InForm Portal database schema created by the import.
- **trial_user_pass**—Password for the owner of the InForm Portal database schema created by the import.

Example:

```
DropDB.cmd TRIAL1
```

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

- 5 Import the InForm Portal 4.6 or 5.0 DMP file, and then proceed to step 7.

Note: To import an InForm Portal 5.5, 6.0, or 6.1 DMP file, proceed to step 6.

- 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> <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.
- **From_Portal_UserID**—Owner of the portal database schema being migrated.
- **To_Portal_UserID**—Owner of the Portal database schema created for the import.

You are prompted for the following values:

- **orasystem_user**—Oracle system user ID.
- **orasystem_user_pass**—Oracle system user password.

You can also pass the parameters by using the `/accountparams:"path_to_parameter_file"` command option.

When specified, this option includes the path to a text file that contains the values required to run the command. The format of the parameter file is `parameter=value`. There is a new line for each parameter, and there are no spaces on a line.

Example:

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

The `ImportDBUpgrade` command creates the log file *<DMP_file>.log*.

- 6 Import the InForm Portal 5.5, 6.0, or 6.1 DMP file:

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

```
ImportPortalDB.cmd <TNS_Service_Name> <Physical_Directory_Path>
<DMP_File_Name> <From_Portal_UserID>
```

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.
- **From_Portal_UserID**—Owner of the portal database schema being migrated.

You are prompted for the following values:

- **orasystem_user**—Oracle database system user.
- **orasystem_user_pass**—Password for the Oracle database system user.

- **trial_user**—Owner of the new portal database schema created by the ImportPortalDB command.
- **trial_user_pass**—Password of the owner of the new portal database schema.

You can also pass the parameters by using the `/accountparams:"path_to_parameter_file"` command option.

When specified, this option includes the path to a text file that contains the values required to run the command. The format of the parameter file is `parameter=value`. There is a new line for each parameter, and there are no spaces on a line.

For example:

```
ImportPortalDB.cmd trial1 /u01/app/oracle/dp_export pfst55.dmp pfst55uid
```

The ImportPortalDB command creates the log file `<DMP_file>.log`.

- 7 Run **UpgradeInFormPortal.cmd** (located in the `<InstallationDirectory>\InForm\Bin\DBOra` folder) using the following syntax:

```
UpgradeInFormPortal.cmd <InForm_TNS_Name> <Portal_TNS_Name> <Study_Name>
```

where:

InForm_TNS_Name—TNS name for the InForm database instance.

Portal_TNS_Name—TNS name for the InForm Portal database instance.

Study_Name—InForm study.

You are prompted for the following values:

- **Portal user ID**—Owner of the InForm Portal database schema.
- **Portal user password**—Password for the owner of the InForm Portal database schema.
- **Trial user ID**—Owner of the study database schema.
- **Trial user password**—Password for the owner of the study database schema.

You can also pass the parameters by using the `/accountparams:"path_to_parameter_file"` command option.

When specified, this option includes the path to a text file that contains the values required to run the command. The format of the parameter file is `parameter=value`. There is a new line for each parameter, and there are no spaces on a line.

The UpgradeInFormPortal command migrates the information from the InForm Portal database to the InForm study database.

Assign portal rights to existing rights groups

Note: This step is required only if you are upgrading from any InForm 6.0 release.

The InForm Portal users and rights have been changed in the InForm 6.1 release. As a result, the Portal Admin and Portal Config Admin users are no longer available. Before you upgrade the InForm Portal database, record the rights that these users were granted so that you can reassign them to new users.

You can create new users, and assign them to the rights groups in the InForm application that include the appropriate InForm Portal rights. The following InForm Portal rights are available in the InForm application:

- Add/Edit Tabs
- Add/Edit Sections
- Upload/Update Documents
- Update Homepage
- Update Company Logo

Ensure that your InForm Portal users have the appropriate rights by assigning these rights to existing rights groups according to the needs of your study.

For more information, see the *User Guide*.

Upgrading in the same environment

Upgrade the InForm Portal database in an existing environment

Note: This step is required only if you are upgrading from any InForm 6.0 or 6.1 release.

- 1 Run **UpgradeInFormPortal.cmd** (located in the <InstallationDirectory>\InForm\Bin\DBOra folder) using the following syntax:

```
UpgradeInFormPortal.cmd <InForm_TNS_Name> <Portal_TNS_Name> <Study_Name>
```

where:

InForm_TNS_Name—TNS name for the InForm database instance.

Portal_TNS_Name—TNS name for the InForm Portal database instance.

Study_Name—InForm study.

You are prompted for the following values:

- **Portal user ID**—Owner of the InForm Portal database schema.
- **Portal user password**—Password for the owner of the InForm Portal database schema.
- **Trial user ID**—Owner of the study database schema.
- **Trial user password**—Password for the owner of the study database schema.

You can also pass the parameters by using the **/accountparams:"path_to_parameter_file"** command option.

When specified, this option includes the path to a text file that contains the values required to run the command. The format of the parameter file is parameter=value. There is a new line for each parameter, and there are no spaces on a line.

The UpgradeInFormPortal command migrates the information from the InForm Portal database to the InForm study database.

- 2 *Assign portal rights to existing rights groups* (on page 37).

Note: This step is required only if you are upgrading from any InForm 6.0 release.

CHAPTER 5

Upgrading and migrating the reporting environment

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Migrating the reporting environment to a new machine

You can migrate the reporting environment for any supported InForm 4.6, 5.0, 5.5, 6.0, or 6.1 study to a new machine. You must install a new Cognos 10 BI Reporting environment, and create, export, and then import your export packages.

Note: Automated deployments from the Central Designer application are not supported for environments that have the InForm database and the InForm reporting database installed on separate instances.

Note: Depending on the InForm version you are migrating from, some steps may not be required.

- 1 *Install and configure the Cognos 10.2.1 environment* (on page 41).
 - a *Install and customize the Cognos 10.2.1 software* (on page 41).
 - b *Identify or create the required users for any InForm study* (on page 42).
- 2 *Create an export package and export the data from your Cognos environment* (on page 43).
 - a Review *About the export package* (on page 43).
 - b *Create an export package for each study in the Cognos environment* (on page 43).
 - c *Copy the export package to the Cognos 10.2.1 server* (on page 45).
- 3 *Create the streams between the InForm study schema and the Reporting schema, and install the Reporting schema* (on page 45).
- 4 *Import the export package* (on page 46).
 - *Run the Reporting Import Utility* (on page 46).
- 5 *Run the PFCognosConfig utility* (on page 47).
- 6 *Modify the PFRSetupTrial.xml file* (on page 47).
- 7 *Run PFRInit on the InForm application server* (on page 48).
- 8 *Delete obsolete reports* (on page 48).

Note: This step is required only if you are upgrading from any InForm 4.6 studies.

- 9 *Associate custom reports with the new operational packages* (on page 49).

Note: This step is required only if you are upgrading from any InForm 4.6 studies.

- 10 *Restart the InForm Model Updater service* (on page 49).
- 11 *Revalidate custom reports* (on page 50).
- 12 *Update schedules and jobs* (on page 50).
- 13 *Delete the study organizational units from the LDAP configuration* (on page 50).

Note: This step is not required if you are upgrading from any InForm 6.0 or 6.1 release.

Install and configure the Cognos 10.2.1 environment

Install and customize the Cognos 10.2.1 software

- 1 Install the Cognos 10 BI Reporting 64-bit software on the Cognos servers.

Note: For information on how to install and customize the Cognos 10.2.1 software, see the *Installation Guide*.

- 2 Install the following interim fix updates in this order:
 - a up_bisrvr_winx64h_10.2.5000.1030
 - b up_bisrvr_winx64h_10.2.5000.1079
- 3 Install Fix Pack 2 (FP2) for the Cognos 10.2.1 software.
- 4 Install the Cognos hotspots and interim fixes in this order:
 - a up_bisrvr_winx64h_10.2.5002.1021
 - b up_bisrvr_winx64h_10.2.5002.1113
- 5 Install the following interim fix updates in this order:
 - a up_bisrvr_winx64h_10.2.5000.1125
 - b up_bisrvr_winx64h_10.2.5000.1129
- 6 Customize the Cognos 10.2.1 software on the Cognos servers.
 - a Run the Cognos 10 Customization for InForm wizard (CRNConfig) on all Report and Content Manager servers.
 - b Run the Cognos 10 Gateway Customization for InForm wizard (CRNGatewayConfig) on all Gateway servers.
- 7 Start the Cognos 10 BI Reporting servers.

For more information, see the *Installation Guide*.

Identify or create the required users for any InForm study

Before you start the Cognos 10.2.1 upgrade, make sure that the following users exist so that you can log in to the Cognos 10 BI Reporting 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 pfmodelupdater service. The pfmodelupdater 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>
```

When prompted, enter the password for the pfreportinguser.

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

- Reset the password for the Reporting CAP Admin database using the following command:

```
PFADMIN SETSERVER REPORTINGCAPADMINPW <studyname>
```

When prompted, enter the password for the reportingcapadmin user.

Note: For Oracle-hosted single sign-on (SSO) studies, run `pfadmin setserver trialorgid <studyname> <study_orgid>` to set the SSO OrgID for the study.

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 6.1.0.1 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 10 BI Reporting environment after you install the InForm 6.1.0.1 software and the Cognos 10 BI Reporting software.

Because the current Cognos environment remains intact until the Cognos 10 BI Reporting 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 8.2 or 8.4 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 or 10.2:
 - a Select **Launch > Reporting Administration**.
 - b On the Configuration tab > **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).

Note: If you are using Cognos 8.4 or 10.2, select **Add to** before you can select the packages you want to include.

- 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:
 - a Select the **Encrypt the content of archive** checkbox.
 - b Click **Set the Encryption password**.
 - c Enter a password for the archive, and click **OK**.

- 15 Click **Next**.
- 16 On the **Review the Summary** page, review the export details, and click **Next**.
- 17 On the **Select an action** page, select **Save and Run once**, and click **Finish**.
- 18 On the **Run with options** page, in the **Time** section, select **Now**, and click **Run**.
- 19 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.
- 20 Click **Close**.

Copy the export package to the Cognos 10.2.1 server

- Copy the export package from the <Cognos8_InstallationDirectory>\deployment folder to the <Cognos10_InstallationDirectory>\deployment folder.

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

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 Run **configandcheckdiffdb**
For more information, see the *Installation Guide*.
- 6 Run **install_reporting_diffdb** to install the reporting schema.
For more information, see the *Installation Guide*.

Import the export package

The Reporting Import utility is a command-line script that imports report content into a new or upgraded environment, or imports custom report specifications into an existing environment. Using this utility eliminates a manual step in the upgrade and migration process, and provides additional security and accuracy.

Use this command to migrate your export package into the InForm 6.1.0.1 environment.

Run the Reporting Import Utility

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 10 BI server.

This Cognos 10 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 System Configuration page in the InForm Admin user interface.

- 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 the *Installation Guide*.

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 yyyyymmdd_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 6.1.0.1 application server to configure an InForm study to work with the Cognos 10 BI Reporting 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 When you run the PFRInit command you have to pass the following parameters on the command line:
 - **sysadmin_namespace**—Oracle Directory Server admin namespace.
 - **sysadmin_uid**—User name for the Oracle Directory Server admin namespace.
 - **sysadmin_pass**—Password you chose when creating the Oracle Directory Server admin namespace user.
 - **publisher_namespace**—Custom Authentication Provider (CAP) namespace.
 - **publisher_uid**—InForm study user who is a member of the Publisher and Sponsor Users (or Site Users) Reporting groups.
 - **publisher_pass**—Password of the InForm study user.

- **dispatcher_url**—Internal URI that the InForm server uses to communicate with the Cognos 10 BI server.
- **trial_name**—Name of the InForm study.
- **reportdb_pass**—Password for the reporting schema user.

There is also an option to pass these values in a parameter file. For more information, see the *Installation Guide*.

Note: You must use the most current version of this file, located in the *<InstallationDirectory>\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

Note: This step is required only if you are upgrading from any InForm 4.6 studies.

If you are migrating from an InForm 4.6 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

Note: This step is required only if you are upgrading from any InForm 4.6 studies.

- 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 6.1.0.1 <studyname> **InForm Trial Management**.
For each report:
 - a Log in to an InForm study as a user who has the Reports 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 10 BI Reporting 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.

Restart the InForm Model Updater service

- 1 Check the event log for the **InForm Model Updater** service to make sure the service is not generating the clinical model for an existing study.
 - If the last entry in the event log is Finished Processing All Trials, proceed to step 2.
 - If the last entry indicates that a clinical model generation is in progress, wait for the generation to finish before continuing to step 2.
- 2 Stop and start the **InForm Model Updater** service to force the immediate clinical model generation for all the upgraded InForm 6.1 studies.

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 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**.
- 3 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

Note: This step is not required if you are upgrading from any InForm 6.0 or 6.1 release.

LDAP is not used to authenticate study users in the InForm 6.1.0.1 release.

- Manually delete the study organizational units (OUs) from the Oracle Directory Server using the Oracle Directory Service Control Center.

APPENDIX A

InForm registry key reference

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About registry key migration

The following Windows registry keys control the InForm software features and behavior. If you are migrating from an InForm application server that has registry customizations, you can modify these registry key values to apply the same customizations.

- HKLM\Software\OracleHS\AuthenticationFilter
- HKLM\Software\OracleHS\InForm
- HKLM\Software\OracleHS\InForm\PFAppMgr
- HKLM\Software\OracleHS\InForm\PFImport
- HKLM\Software\OracleHS\InForm\PFMgrExecutionPlan
- HKLM\Software\OracleHS\InForm\PFMgrTrial
- HKLM\Software\OracleHS\InForm\PFQuery
- HKLM\Software\OracleHS\InForm\UDA

For example, if your study suppresses the word **Unscheduled** from the title of an unscheduled form, you need to edit the **HKEY_LOCAL_MACHINE\Software\OracleHS\InForm** registry key **ShowUnscheduled** value to match the value you exported from your old InForm application server.

Note: Not all registry settings need to be migrated. You should evaluate each entry to see if a modification is required.

HKLM\Software\OracleHS\AuthenticationFilter

Name	Description
ByPassKeyPhrase	Exclude some URLs from processing by authentication filter.
DomainSuffix	Domain Suffix.
ExternalLoginEnabled	External Login Enabled.
ExternalLoginFailureURL	External Login Failure URL.
ExternalLoginFilter	External Login Filter.
ExternalLoginURL	External Login URL.
FilterEnabled	Enable/disable the authentication filter.

HKLM\Software\OracleHS\InForm

Name	Description
CheckSubmitID	Skip checks for duplicate submits.
ShowUnscheduled	Hide the word "Unscheduled" in CRF title.

HKLM\Software\OracleHS\InForm\PFAppMngr

Name	Description
TimeOut	Set timeout when waiting for InForm work threads to finish.
TerminateProcessTimeout	Time to wait for processes to end when stopping InForm server.
RecoveryEnabled	Disable recovery of InForm server when processes crash.
RecoveryTimeout	Control timeout for InForm server recovery.

HKLM\Software\OracleHS\InForm\PFImport

Name	Description
ForceTrialUpdate	Set to tell InForm to recalculate form state immediately.

HKLM\Software\OracleHS\InForm\PFMngrExecutionPlan

Name	Description
FromAddress	Email From Address.

HKLM\Software\OracleHS\InForm\PFMngrTrial

Name	Description
{TRIALNAME}_ItemSetUNSVRequired Only / {TRIALNAME}_ItemSetUNSVRequired Only	Changes in SDVREQUIRED items cause the row to be unverified.
PatientCacheLoadingMode	Control how subject cache is loaded when study starts.
RunRulesWhenDelete	Disable running rules when deleting itemset row.

HKLM\Software\OracleHS\InForm\PFQuery

Name	Description
SignaturePrintPreviewQueries	Enable display of open and answered queries in Signature Print Preview.

HKLM\Software\OracleHS\InForm\UDA

Name	Description
CheckDBVersion	Skip Oracle DB version check at runtime.
CreatePoolSize	Force creation of a pool of ODBC connections.
TryDBConnect	Set number of times to retry SQL in the DB Setup code.
TryDBConnectPause	Wait between retries in DB Setup code.