

Oracle® Life Sciences InForm

Study and Reporting Setup Guide



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Setting up and configuring a study

In this chapter:

- [About setting up and configuring a study](#)
- [Study setup workflow](#)
- [Optional study features](#)

About setting up and configuring a study

Setting up and configuring a study requires a series of steps performed with multiple products. For an illustration of the setup process, see [Study setup workflow](#).

1. Ensure all of the required set up tasks, which are performed with multiple products, are complete.
 - **Oracle Central Designer application**—Use to define the study forms and visits, system configuration parameters, and study administration parameters. For more information, see [Central Designer—Study setup requirements](#).
 - **Oracle InForm application**—Use to install the Oracle InForm software, Oracle Central Designer certificates, and Oracle Central Designer rule engine, and to create deployment users. For more information, see [InForm—Study setup requirements](#).
 - **User management tool**—Use to create the Oracle InForm users, define the rights, rights groups, and sites. For more information, see [User management tool—Study setup requirements](#).
2. Use the Oracle Central Designer application to deploy your study to the Oracle InForm application.
For more information, see [Study package deployment to the InForm application](#).
3. Use the Oracle InForm application to configure any optional study features that are required by your study.
For more information, see [Optional study features](#).
4. Use your user management tool to transmit the users, rights, rights groups, and site information to the Oracle InForm application.
 - [Oracle Central Designer—Study setup requirements](#)
 - [Oracle InForm—Study setup requirements](#)
 - [User management tool—Study setup requirements](#)
 - [Study package deployment to the Oracle InForm application](#)

Oracle Central Designer—Study setup requirements

A study designer typically performs the Oracle Central Designer study setup tasks.

The Oracle Central Designer study setup tasks can be performed at same time as the Oracle InForm study setup tasks.

1. Design the study, including the forms and visits.
2. Specify the system configuration parameters.
System configuration parameters are global settings that specify customizable, system-wide Oracle InForm behaviors for how the Oracle InForm application handles a study.
3. Set up the study administration parameters, including display overrides and rights groups.
Study administration parameters specify configuration parameters for a study, who is running a study, and how the Oracle InForm application distributes the workload.

Oracle InForm—Study setup requirements

An Oracle InForm study administrator typically performs the Oracle InForm study setup tasks.

The Oracle InForm study setup tasks can be performed at same time as the Oracle Central Designer study setup tasks.

1. Install and configure a 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. A skeletal study is required for automated deployment.

Skeletal studies are created and configured to communicate with the Oracle Central Designer application using pfadmin commands during the Oracle InForm software installation. For more information, see the *Installation Guide*.
2. Create Deployment users for the study.
A deployment user is any sponsor user with the Study Deployment right.
You create deployment users in the Oracle InForm user interface or with the MedML Installer utility. For more information, see the *Utilities Guide*.
3. Install the Oracle Central Designer security certificates and the Oracle Central Designer rule engine.
For more information, see the *Installation Guide*.

User management tool—Study setup requirements

A User Manager typically performs the user management tool study setup tasks.

You can perform the following tasks at any time.

1. Create users.
2. Assign rights to rights group.
3. Assign users to rights groups.
4. Define sites.

You perform the following tasks after the skeletal study is set up, and before or after the study deployment.

- Submit users, rights, rights group, and site information to the Oracle InForm application.

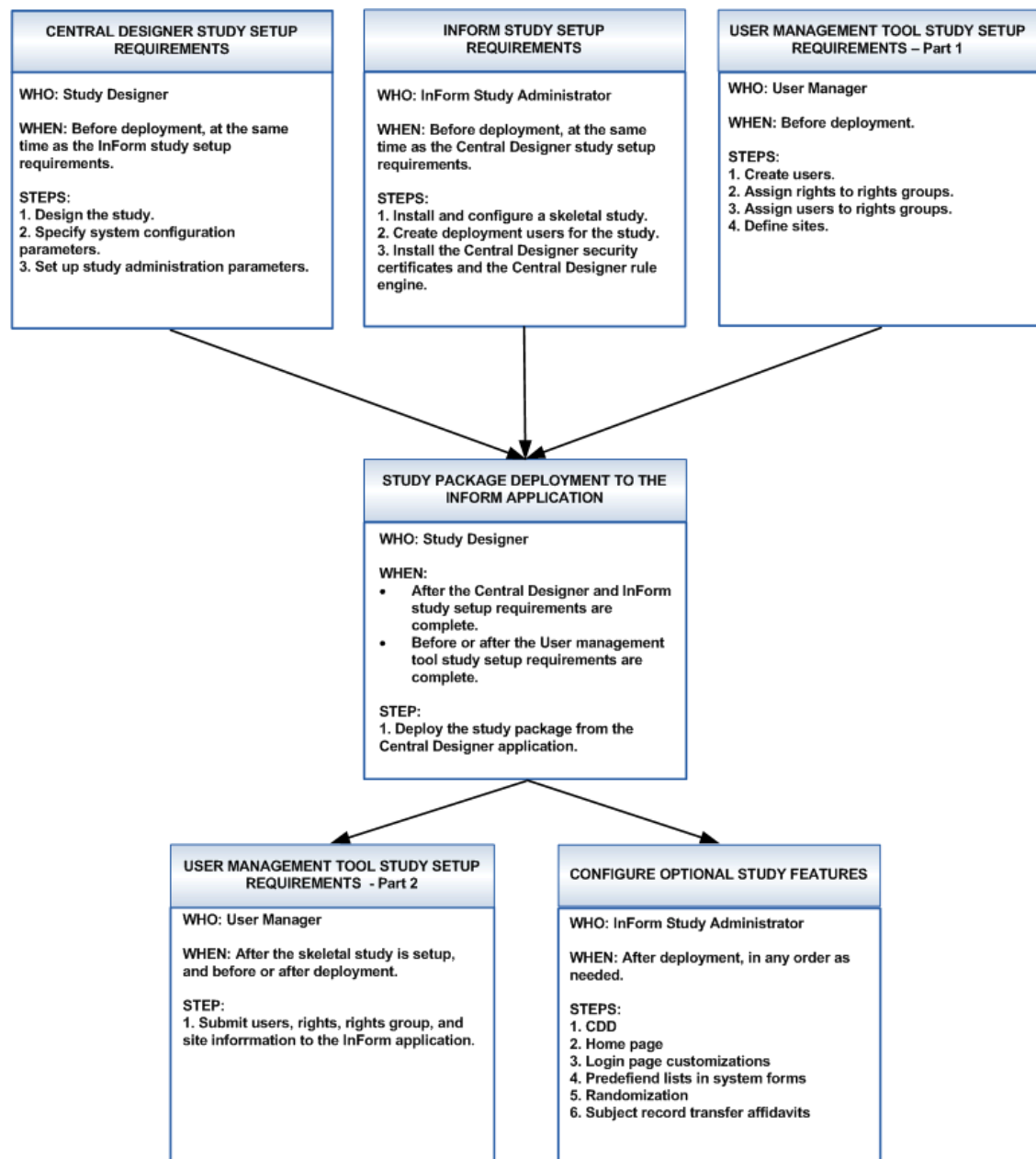
Study package deployment to the Oracle InForm application

A study designer typically deploys the study package to the Oracle InForm application.

1. Ensure that all the Oracle Central Designer and Oracle InForm study setup requirements are complete.
2. Deploy a Oracle Central Designer study package from the Oracle Central Designer user interface.

Study setup workflow

The study setup workflow is a cross-product process that includes requirements from the Oracle Central Designer application, the Oracle InForm application, and a user management tool.



Optional study features

Depending on the requirements of your study, you might need to set up some optional features that are not available through the Oracle InForm user interface.

This guide provides instructions for configuring these features, which can be configured in any order, and include:

- [Customer-Defined Database \(CDD\)](#)
- [Login page customizations](#)
- [Predefined lists in system forms](#)
- [Randomization](#)
- [Subject record transfer affidavit](#)

Customer-Defined Database (CDD)

A CDD is an extract of clinical data from a study database. You can use a CDD to pass data into customer statistical analysis tools or other external programs. You can use either the Reporting and Analysis module or a CDD, or both, to extract data from a study.

CDD	Reporting and Analysis module
Clinical data only	Clinical and operational data
Database structure defined by customer	Database structure based on study design
Mappings defined in Oracle Central Designer application	Mappings defined in Reporting and Analysis user interface
Requires external analysis tools	Includes report generation tools

- [Configuring a CDD](#)

Configuring a CDD

**Note:**

It is recommended that the default tablespace for the CDD user should not be the Oracle InForm tablespace.

1. Using the following command, make sure that the study is running.

```
pfadmin view service
```

2. Create a CDD schema with the DSN name, DSN user, and DSN password:

```
pfadmin setup cdd <CDDRefName> <TrialName>/DB<oracle_connection_string>  
<DSN>
```

When prompted, enter:

- The name of the study schema owner.
- The password of the study schema owner.

**Note:**

The schema owner UID and PID must begin with a letter and contain alphabetic or alphanumeric characters. Do not use all numeric characters.

For example:

```
pfadmin setup cdd PFSTCDD pfst62 /DB testmachine_dev1 pfstcdd
```

3. Make the online CDD functionality transactional:

```
pfadmin config cdd <TrialName> <CDD_DSN> [Active | Inactive]
```

For example:

```
pfadmin config cdd pfst62 pfstcdd active
```

4. Enable online CDD functionality for the study:

```
pfadmin config cdd TrialName [Enable | Disable]
```

For example:

```
pfadmin config cdd pfst62 enable
```

5. In a multilingual study, specify the study locale to use for the unit symbol translation that is stored in the CDD column for the unit symbol:

```
pfadmin config cdd <TrialName> <CDD_DSN> <StudyLocale>
```

For example:

```
pfadmin config cdd pfst62 pfstcdd es-ES
```

For more information, see pfadmin.

Login page customizations

A study administrator can add support and contact information to the Oracle InForm Login page and the External Reporting Login page. By default, support and contact information does not appear on the login pages.

- [Customizing support contact information for the Oracle InForm Login page](#)
- [Customizing support contact information for the External Reporting Login page](#)

Customizing support contact information for the Oracle InForm Login page

By default, contact information does not appear on the Oracle InForm Login page.

To add contact information to the Login page:

1. Edit the **LoginScreen_SupportInfo** resource string in the **resources_auth.xml** file, located in <installation_folder>\InForm\resources.

You must use XML character entities instead of HTML tags for special characters in the data you enter in the resource string.

For example:

Incorrect: Tech Support information

Correct: Tech Support information

2. Install the updated file with the MedML Installer utility.

3. Navigate to the Oracle InForm Login page to verify that the contact information that appears on the page matches what you entered in the `resources_auth.xml` file.

The contact information appears at the bottom of the Oracle InForm Login page.

 Note:

Customized files are overridden when you upgrade a study. If you upgrade your study, you must reinstall the support contact information.

Customizing support contact information for the External Reporting Login page

By default, contact information does not appear on the External Reporting Login page.

To add contact information to the External Reporting Login page:

1. Edit the **ExternalLoginForm.aspx** file, located in `<cognos_installation_directory>\InForm\pfexternallogin`.
2. Edit **div id= "TechSupportInfo" text=** attribute, and save the file.
3. Clear the browser cache.

Any information you enter is visible on the External Reporting Login page as soon as you save the file, and then access the External Reporting Login page.

The contact information appears at the bottom of the External Reporting Login page.

 Note:

Customized files are overridden when you upgrade Reporting. If you upgrade Reporting, you must update the `ExternalLoginForm.aspx` file again.

Predefined lists in system forms

The Oracle InForm application provides several predefined lists that specify default text for such things as rights, comments, and query responses. You define the entries in the change reason list of the Data Values page for changes to items and for entries in the query text list on the Queries page.

Although you should not manipulate most of these lists directly, you can modify the default text that displays in the drop-down lists for:

- Reasons for change.
- Reasons for clearing a CRF.
- Reasons for editing an item.
- Query responses (not query states).

**Note:**

These defaults are base components and are part of the study. If you modify the settings in these files, you must reinstall the XML into the study in order for the changes to take effect.

The following table lists the text that you can change and the files in which you can make the changes.

Text to customize	File to edit
Reasons for change	XMLBase\sysform_EditItem.xml
Reasons for clearing a CRF	XMLBase\sysform_ClearCRF.xml
Reasons for editing an item	XMLBase\sysform_ItemEditReasons.xml
Query responses	- Resources\Enu\pfscript.js - Resources\Enu\Templates\PDFPage.xsl - Resources\Enu\resources.xml - Resources\Jpn\pfscript.js - Resources\Jpn\Templates\PDFPage.xsl - Resources\Jpn\resources.xml

Allowable changes include:

- Adding new label text values.
- Removing an existing option (ELEMENTREF).
- Replacing an existing text value with a new text value.

**Caution:**

Do not delete an existing PFELEMENT definition for a predefined list, even if you remove the corresponding ELEMENTREF tag.

- [Changing reason text for clearing a CRF or editing an item](#)
- [Changing query text](#)
- [Types of query text strings in the pfscript.js and PDFPage.xsl file](#)

Changing reason text for clearing a CRF or editing an item

You can add new text values to predefined lists, and you can remove existing values or replace them with new values by changing the definitions that the Oracle InForm software references. You cannot physically delete an existing text definition in a predefined list (in other words, *do not delete* the PFELEMENT definitions of the existing values).

**Note:**

If you change the system forms in the XML_Base folder of the Oracle InForm installation, as described in this procedure, *all* studies that you install subsequently reflect the customized reason text. To customize the reason text for only one study, save the customized system form XML files in a different location from the XML_Base folder, and install them from the saved location with the MedML Installer utility.

To change a reason text value:

1. Make a backup copy of the file for the list to edit.
 - **sysform_ClearCRF.xml**—Contains the list of reasons for clearing a CRF.
 - **sysform_EditItem.xml**—Contains the list of reasons for editing a CRF item.
2. Open the file.
3. Create a new PFELEMENT definition for the new text you want to add. For example,

```
<PFELEMENT REFNAME="CLEARCRF_WRONGSUBJECT"
  LABEL="Wrong Subject"
  TYPE="STRING"
  VALUE="Wrong Subject"/>
  <TRANSLATIONS>
    <TRANSLATION NAME="LABEL" DISPLAYTEXT="<Japanese_text>"
  LOCALE="ja-JP" />
  </TRANSLATIONS>
```

4. Edit the list of ELEMENTREF definitions in the appropriate drop-down list definition:
 - To add a new text value, add a new ELEMENTREF definition that uses the REFNAME value you defined in step 3. Be sure to specify the order in which you want the new text to appear in the drop-down list. For example, add a new selection for a Severe Transcription Error in the second position in the drop-down list:

```
<PULLDOWNCONTROL REFNAME="CLEARCRF_CHANGEREASONPULLDOWN"
  UUID="730C92AD-33AE-11D3-8D93-00902757C687"
  NAME="CLEARCRF_CHANGEREASONPULLDOWN">
  <ELEMENTREF REFNAME="CLEARCRF_TRANSCRERROR" ORDER="1"/>
  <ELEMENTREF REFNAME="CLEARCRF_WRONGSUBJECT"
  ORDER="2"/>
  <ELEMENTREF REFNAME="CLEARCRF_NEWINFO" ORDER="3"/>
  <ELEMENTREF REFNAME="CLEARCRF_CHANGEDINFO" ORDER="4"/>
</PULLDOWNCONTROL>
```

- To replace an existing text value with a new one, edit the ELEMENTREF definition that refers to the old value by changing the REFNAME attribute to refer to the new value you defined in step 3. For example, to substitute the new text for a Severe Transcription Error in place of the original "Transcription Error," you would change the XML to look like this:

```
<PULLDOWNCONTROL REFNAME="CLEARCRF_CHANGEREASONPULLDOWN"
  UUID="730C92AD-33AE-11D3-8D93-00902757C687"
  NAME="CLEARCRF_CHANGEREASONPULLDOWN">
```

```
<ELEMENTREF REFNAME="CLEARCRF_WRONGSUBJECT"
ORDER="1"/>
<ELEMENTREF REFNAME="CLEARCRF_NEWINFO" ORDER="2"/>
<ELEMENTREF REFNAME="CLEARCRF_CHANGEDINFO" ORDER="3"/>
</PULLDOWNCONTROL>
```

- To remove an existing text value, delete the ELEMENTREF definition that refers to it. Update the ORDER attributes of the remaining ELEMENTREF definitions to reflect the change. For example, to cause the Oracle InForm application to ignore both transcription error messages, change the XML to look like this:

```
<PULLDOWNCONTROL REFNAME="CLEARCRF_CHANGEREASONPULLDOWN"
UUID="730C92AD-33AE-11D3-8D93-00902757C687"
NAME="CLEARCRF_CHANGEREASONPULLDOWN">
<ELEMENTREF REFNAME="CLEARCRF_NEWINFO" ORDER="1"/>
<ELEMENTREF REFNAME="CLEARCRF_CHANGEDINFO" ORDER="2"/>
</PULLDOWNCONTROL>
```

Note:

Take care not to remove or replace any ELEMENTREF definitions for query states.

5. Save your changes.
6. Install the updated system forms by using the MedML Installer utility.

Changing query text

You can change the text of standard query reasons and responses by editing the following files in the Oracle InForm installation tree:

- \Resources\Enu\pfscript.js
- \Resources\Enu\Templates\PDFPage.xsl
- \Resources\Jpn\pfscript.js
- \Resources\Jpn\Templates\PDFPage.xsl

Note:

Standard query reasons and responses appear in the user's product locale in the Reporting and Analysis module. If you customize query reasons and responses, the custom text does not appear in the user's product locale in the Reporting and Analysis module.

Each set of strings, prefixed by a number in brackets, appears under different conditions in an Oracle InForm study. For more information, see [Types of query text strings in the pfscript.js and PDFPage.xsl files](#).

1. Make a backup copy of each **pfscript.js** and **PDFPage.xsl** file.
2. In the QO section of each **pfscript.js** and **PDFPage.xsl** file, add, edit, or remove query text strings as desired.

Separate response strings with a comma and surround each string with double quotation marks. The QO section of the pfscript.js and PDFPage.xml files follows:

```
QO=[[ [1,2],["Item incomplete","Data does not match source","Missing
units","Make text more specific"]],
      [[7],["Original value is correct","Changed data per query","Query is
ambiguous","Data is not in patient record","Measurement skipped on this
visit"]],
      [[3],["Response from site required"]],
      [[4],["Query is invalid or does not apply","Query can be addressed
internally"]],
      [[5,6],["Response does not satisfy query"]],
      [[8],["Response satisfies query"]],
      [[9],["State chosen is acceptable"]]]
```

3. Use the following XML to install the updated pfscript.js files with the MedML Installer utility:

```
<RESOURCEDATA xmlns="PhaseForward-MedML-Inform4">
<RESOURCE
  FILENAME="pfscript.js"
  UUID="PF_RESOURCE_GENERIC_SCRIPT_MAIN"
  DESCRIPTION="Main Script"
  DATATYPE="SCRIPT"
  LANGUAGE="English"/>
<HTMLTEMPLATE
  TEMPLATENAME="PF_SCRIPT_MAIN"
  BROWSERNAME="GENERIC"
  RESOURCEUUID="PF_RESOURCE_GENERIC_SCRIPT_MAIN"/>
</RESOURCEDATA>
<RESOURCE
  FILENAME="pfscript.js"
  UUID="PF_RESOURCE_GENERIC_SCRIPT_MAIN"
  DESCRIPTION="Main Script"
  DATATYPE="SCRIPT"
  LANGUAGE="Japanese"/>
<HTMLTEMPLATE
  TEMPLATENAME="PF_SCRIPT_MAIN"
  BROWSERNAME="GENERIC"
  RESOURCEUUID="PF_RESOURCE_GENERIC_SCRIPT_MAIN"
/>
```

Types of query text strings in the pfscript.js and PDFPage.xml file

Identifier	Default strings	When used
[1,2]	["Item incomplete","Data does not match source","Missing units","Make text more specific"]	Creating a query.
[3]	["Response from site required"]	Placing a candidate query in open state.
[4]	["Query is invalid or does not apply","Query can be addressed internally"]	Deleting a query.
[5,6]	["Response does not satisfy query"]	Reissuing a query.

Identifier	Default strings	When used
[7]	["Original value is correct", "Changed data per query", "Query is ambiguous", "Data is not patient record", "Measurement skipped on this visit"]	Responding to a query.
[8]	["Response satisfies query"]	Closing a query.
[9]	["State chosen is acceptable"]	Resolving a conflict.

Randomization

The randomization feature of the Oracle InForm application enables users to assign a drug kit to a subject based on a randomization scheme that has been chosen for the study. When randomization configuration is complete, one of the study's forms contains a Drug Kit section. When a user clicks the Randomize button, the Oracle InForm application returns a drug kit number, along with associated information about the drug kit, in the Drug Kit section of the form.

Before a user can use the randomization feature, you must perform the following configuration activities:

1. In the Oracle Central Designer application, include an item with the Special Fields custom property value of Randomization field (Randomization) on the form from which users will randomize subjects.
2. In the Oracle Central Designer application, create a randomization rule to generate the sequence and drug kit number. The Randomize function is available to help you create the rule.

For more information, see the Oracle Central Designer *Rules Reference Guide*.

3. Create a randomization sequence for each different list of drug kits used in the study, and install it in the study database using the MedML Installer utility.

The number of drug kit lists depends on the randomization method chosen:

- **Simple Central (Type 1)**—The study uses one list of drug kits. Each new subject is assigned the next sequential drug kit number on the list.
- **Central Stratified (Type 2)**—The study has multiple lists of drug kits. Each new subject is assigned to a drug kit list based on entered subject data. Then, the subject is assigned the next sequential drug kit number on that list.
- **Simple Site (Type 3)**—Each site has a different drug kit list. Each new subject is assigned the next sequential drug kit number on the list for the subject's site.
- **Stratified by Site (Type 4)**—Each site has multiple lists of drug kits. Each new subject is first assigned to the set of lists for the subject's site. Then, the subject is assigned to one of the site's drug kit lists based on entered subject data. Finally, the subject is assigned the next sequential drug kit number on that list.

For more information, see [Randomization sequences](#).

4. Configure the randomization data source manager (COM object) to be used.

For more information, see [Randomization source manager configuration](#).

5. Configure the format of each randomization sequence to be used.

For more information, see [Randomization sequence format configuration](#).

6. Configure the study to use the randomization data source.
For more information, see [Randomization source database setup](#).
 7. Create an ODBC connection for each randomization source database.
You can do this manually or by using the pfadmin utility.
For more information, see [ODBC connection for the randomization database](#).
 8. Configure the study to use the randomization data source defined for it.
This step is necessary only if you create the ODBC connection manually. If you perform that step by using the pfadmin utility, the utility performs both the DSN creation and configuration automatically.
For more information, see [Configuring the study to use the randomization DSN](#).
- [Randomization sequences](#)
 - [Randomization source manager configuration](#)
 - [Randomization sequence format configuration](#)
 - [Randomization source database setup](#)
 - [ODBC connection for the randomization database](#)
 - [Migrate an existing Microsoft Access randomization source to an Oracle Database](#)

Randomization sequences

A study that uses randomization requires the following sequence definitions:

- One SequenceType definition for the Randomization sequence. This definition is included in the base study and is in the following format:

```
<SEQUENCETYPE SEQUENCETYPENAME="Randomization"/>
```
- A Sequence definition for each randomization sequence needed for the study. You need to define one randomization Sequence element for each randomization source. For example:
 - If your study uses the Simple Central randomization method, you need one Sequence definition for the single list of randomization kits.
 - If your study has ten sites and it randomizes by using the Simple Site randomization method, you need ten Sequence definitions, one for each site.
 - If your ten-site study uses the Stratified by Site randomization method, and you categorize subjects into one of three stratifications, you need 30 Sequence definitions.

Each Sequence definition requires the following attributes:

- **SEQUENCENAME**—Name used when referring to the Sequence in the randomization rule and in the randomization source database.
- **SEQUENCETYPENAME**—Randomization, indicating that the sequence is of the Randomization SequenceType.
- **UUID**—Universally Unique Identifier: a string that identifies the element uniquely across all studies, study databases, and machines.

**Note:**

The format of the UUID must follow the format used in the sample UUIDs provided in the Base study. A suggested method for generating UUIDs for Sequence definitions is to copy the UUID of the randomization Sequence definition provided in the core_DefinitionSequences.xml file and change one character for each Sequence definition you create. This ensures that the format is correct and each string is unique. Alphabetic characters in UUIDs should be uppercase.

- [Example of a randomization sequence](#)

Example of a randomization sequence

The following sample .xml file illustrates the definition of the Randomization SequenceType and several randomization sequences. The first is for a Simple Central randomization scheme, and the other two define sequences for sample randomization sources used in a Central Stratified randomization scheme.

```
<?xml version="1.0"?>
<MEDMLDATA xmlns="PhaseForward-MedML-Inform4"><!--SequenceType definition -->
<SEQUENCETYPE SEQUENCETYPENAME="Randomization"/>

<!-- Sample Randomization Sequences -->

<!-- Type 1 randomization sequence -->
<SEQUENCE SEQUENCENAME="SimpleCentral"
    SEQUENCETYPENAME="Randomization"
    UUID="6DFF68EE-759C-11D2-938C-00A0C9769A13" />
<!-- Type 2 randomization sequences -->

<!-- Sequence _WT150 for Weight 90 up to 150 -->
<SEQUENCE SEQUENCENAME="CS_WT150"
    SEQUENCETYPENAME="Randomization"
    UUID="C31355CE-7598-11D2-938C-00A0C9769A13" />

<!-- Sequence _WT275 for Weight above 150 up to 275 -->
<SEQUENCE SEQUENCENAME="CS_WT275"
    SEQUENCETYPENAME="Randomization"
    UUID="D5270A30-7598-11D2-938C-00A0C9769A13" />
</MEDMLDATA>
```

Randomization source manager configuration

The randomization data source is a customer-defined database that contains the drug kit information for each list of drug kits in use in the study. The randomization source manager is implemented as a COM object that accesses the randomization data source database. The randomization source manager provided with the Oracle InForm application accesses the database through ODBC.

The randomization source manager for the Oracle InForm application supports all four randomization methods and Oracle randomization source databases. To use the randomization source manager, add the configuration name and COM ProgID of the randomization source

manager to the system configuration table by using the following statement in the .xml file used to set values in the system configuration table:

```
<SYSCONFIG CONFIGNAME="RandomizationSrc"  
  TYPE="0" VALUE="InForm.PFRandomization.1" />
```

This statement appears in the core_SystemConfig.xml file in the base study.

Randomization sequence format configuration

In the Oracle InForm application, you can configure the format of screening numbers, subject numbers, and randomization numbers. To specify the randomization sequence number format, include a SYSCONFIG component for the sequence number format in the .xml file used to set configuration variable values. The following default format appears in the core_SystemConfig.xml file in the base study:

```
<SYSCONFIG CONFIGNAME="RandSimpleCentral"  
  TYPE="0"  
  VALUE="SC:RND-%q"/>
```

Randomization number configuration is required.

Randomization source database setup

The randomization data source is a custom Oracle Database that contains the drug kit information for each list of drug kits in use in the study.

Create a database schema with the following tables:

- [Randomization table](#)
- [Sourcelists table](#)
- [Drugkits table](#)
- [Populating randomization source database tables](#)
- [Setting up Central Stratified randomization](#)

Randomization table

The Randomization table indicates the randomization types that are in use in the study. This table has the following columns:

Column name	Data type	Description
ID	NUMBER (populated by sequence), primary key	Number that corresponds to the randomization TypeID in the SOURCELISTS table: • 1—Simple Central • 2—Central Stratified • 3—Simple Site • 4—Stratified by Site

Column name	Data type	Description
Type	VARCHAR2	Name of the randomization type; one of the following: • SimpleCentral • CentralStratified • SimpleSite • StratifiedBySite
InStudy	NUMBER	A number greater than 0 indicates that the corresponding randomization type is being used in the current study.

Sourcelists table

The **Sourcelists** table corresponds to the randomization SequenceTypes entered into the Oracle InForm database with XML and the MedML Installer utility. This table has one row for each randomization list used in the study. The table has the following columns:

Column name	Data type	Description
ID	NUMBER (populated by sequence), primary key	Sequential list identification number that maps to the ListID in the DrugKits table.
ListName	VARCHAR2	Name of the drug kit list. The randomization rule must populate the Randomization.Source property with this name.

Column name	Data type	Description
SequenceUUID	VARCHAR2	UUID of the SequenceType to which the drug kit list corresponds in the Oracle InForm software database.  Note: The Oracle InForm application and the MedM L Installer utility convert alphabetic characters in UUIDs to uppercase.
Max	NUMBER	Maximum number of drug kits.
MaxAllowed	NUMBER	Maximum number of drug kits that can be used during the study.

Column name	Data type	Description
TypeID	NUMBER	Identification code of the randomization type. This value maps to the ID column in the Randomization table: • 1—Simple Central • 2—Central Stratified • 3—Simple Site • 4—Stratified by Site

Drugkits table

The Drugkits table holds drug kit information for each randomization source list. This table has the following columns.



Note:

Special configuration may be required if you are using the Central Stratified randomization type. For more information, see [Setting up Central Stratified randomization](#).

Column name	Data type	Description
ID	NUMBER (populated by sequence)	Sequential drug kit identification number.
Description	VARCHAR2	Drug kit information. If the randomization rule so specifies, this information is appended to the randomization number that the Oracle InForm application generates.
ListID	NUMBER	Number that maps to the ID in the SourceLists table and enables the randomization source data manager to get the correct drug kit string.
SequenceNumber	NUMBER	Randomization sequence number in the list identified by the ListID number.

Populating randomization source database tables

For each study, populate the tables of the randomization source database with the information about each drug kit that will be available for use in the study:

- In the **Randomization table**, specify the type of randomization to be used in the study.
- In the **Sourcelists table**, enter the source name and sequence UUID, copied from the XML file used to enter SequenceTypes into the Oracle InForm database, for each drug kit list.
- In the **Drugkits table**, enter information about each drug kit to be used.

**Note:**

As a suggested convention, include the name of the study in the name of the randomization source database, and store the database in the study folder in the Oracle InForm installation tree.

**Note:**

The randomization source database must physically reside on the same machine as the Oracle InForm server; you cannot map it to the Oracle InForm server machine by using a network drive.

Setting up Central Stratified randomization

For the Central Stratified type of randomization, special configuration is necessary if you want the sequence numbers in each drug kit list to start with a number other than 1. In the Central Stratified type of randomization, the study has multiple lists of drug kits. Each new subject is assigned to a drug kit list based on entered subject data. Then, the subject is assigned the next sequential drug kit number on that list.

Under Central Stratified randomization, unless each set of sequence numbers in the Drugkits table in the randomization database starts at 1, randomization fails when you try to randomize a study subject.

If you want your sequence numbers to start with a number other than 1:

1. Set up the Drugkits table so that:
 - Each set of sequence numbers in the SEQUENCENUMBER column starts with 1.
 - The sequence numbers you want to use are in the DESCRIPTION column.
2. In the rule that assigns the sequence number when a subject is randomized, use the GetNextKit method so that the values in the DESCRIPTION column are included in return value provided by the KitInfo variable.

ODBC connection for the randomization database

To configure an ODBC connection for a randomization data source, do one of the following:

- Create the DSN using the Microsoft Windows and ODBC Data Source Administrator. For more information, see:
 - [Creating an ODBC connection using the Windows ODBC Manager.](#)
 - [Configuring the study to use the randomization DSN.](#)
- Use the pfadmin command to create and configure the DSN. For more information, see [Creating an ODBC connection with the pfadmin utility.](#)

You must create a separate DSN for each study's randomization database.

- [Creating an ODBC connection using the Windows ODBC Manager](#)
- [Configuring a randomization data source](#)
- [Creating an ODBC connection with the pfadmin utility](#)

- [Configuring the study to use the randomization DSN](#)

Creating an ODBC connection using the Windows ODBC Manager

1. Click **Start > Administrative Tools > ODBC Data Sources (64-bit)**.
2. Select the **System DSN** tab.
3. Click **Add**.
 - In the Create New Data Source window, select **Oracle in OraClient_<version_home>** driver.
4. Click **Finish**.
5. Configure the data source.

For more information, see [Configuring a randomization data source](#).

Configuring a randomization data source

The Oracle ODBC Driver Configuration dialog box appears:

1. Enter the DSN of the randomization database as the **Data Source Name**. As a suggested convention, include the name of the study in the name of the randomization source database; for example, if the study name is PF304, you can name the randomization DSN PF304RND.
2. Select the TNS name for the randomization database from the **TNS Service Name** drop-down list.
3. Enter the owner of the randomization database in the **User ID** field.

Creating an ODBC connection with the pfadmin utility

1. Open a Command Prompt window.
2. Enter the following command:

```
pfadmin CONFIG Trial<StudyName>/Rnd<TNS_Service_Name>
```

- *StudyName* is the name of the study.
- *TNS_Service_Name* is the TNS name for the randomization database.

When prompted, enter:

- The name of the study schema owner.
- The password of the study schema owner.

For example:

```
PFAdmin config trial PFST62 /Rnd trial1
```

This command creates the <StudyName>RND ODBC data source for the database identified with <TNS_Service_Name> and configures the study to use the data source for randomization.

Configuring the study to use the randomization DSN

If you created a randomization source DSN for a study using the Microsoft Windows ODBC Data Source Administrator, you must configure the study to use the DSN.

 Note:

This step is not necessary if you used the pfadmin utility to create the randomization DSN.

Configure each study separately. Use pfadmin to do this:

1. Open a Command Prompt window.
2. Change to the \bin directory in the Oracle InForm software installation.
3. Enter the following command:

pfadmin CONFIG Trial <StudyName> /RndDSN DSN

- *StudyName* is the name of the study.
- *DSN* is either the:
 - **Name of the randomization source DSN**—When the randomization tables are in a separate database from the study database.
 - **Name of the study DSN**—When the randomization tables are part of the study database.

For more information, see [ODBC connection for the randomization database](#).

When prompted, enter:

- The name of the study schema owner.
- The password of the study schema owner.

 Note:

The schema owner UID and PID must begin with a letter and contain alphabetic or alphanumeric characters. Do not use all numeric characters.

Example:

```
PFAdmin config trial pfst62 /RndDSN pfst62RND
```

Migrate an existing Microsoft Access randomization source to an Oracle Database

Use the **RandomizationMigration** command (located in the <Installation_Directory>\InForm\bin folder) to migrate a trial randomization source database from Microsoft Access to an Oracle Database.

**Note:**

You must install the Microsoft Access Database Engine 2010 Redistributable on the application server before running the RandomizationMigration command.

When you run the command, you can specify whether to:

- Store the randomization tables in the existing study database.
For more information, [Migrating the randomization source to the study database](#).
- Store the randomization tables in a new randomization source database.
For more information, [Migrating the randomization source to a new database](#).
- [Migrating the randomization source to the study database](#)
- [Migrating the randomization source to a new database](#)

Migrating the randomization source to the study database

1. Migrate the Microsoft Access randomization source database to the Oracle InForm application server.
2. Run the following command:

```
pfadmin config trial <StudyName> /Rnd <TNS_Service_Name> [/
accountparams:"path_to_parameter_file" | /prompt]
```

This command creates the <StudyName>RND randomization ODBC data source for the database identified with <TNS_Service_Name>.

3. To migrate trial randomization to the Oracle InForm study database, use the following syntax:

```
RandomizationMigration.exe <StudyName> /UseTrialSchema /prompt
<outfile><RndMdbPathAndFilename>
```

where:

- *StudyName*—The name of the trial for which you are migrating randomization to an Oracle database.
- *outfile*—The name of the log file used to record the results of the RandomizationMigration command.
- *RndMdbPathAndFilename*—The complete path and file name of the Microsoft Access randomization source database.

When prompted, enter the following parameters:

- OracleSysUID—The name of the Oracle user account with SYSDBA privileges.
- OracleSysPID—The password for the Oracle user account with SYSDBA privileges.

The results of the command are recorded in the output file you specify with the command.

- If the migration is successful, the output file will include the word **SUCCESS**.
 - If the migration fails, the first line of the output file will be **ERROR**, followed by one or more error messages that indicate the cause of the failure.
4. Activate the randomization rule in the Oracle InForm application.

5. Restart the trial after the migration is complete.

Migrating the randomization source to a new database

1. Migrate the Microsoft Access randomization source database to the Oracle InForm application server.
2. Run the following command:

```
pfadmin config trial <StudyName> /Rnd <TNS_Service_Name> [/accountparams:"path_to_parameter_file" | /prompt]
```

This command creates the <StudyName>RND randomization ODBC data source for the database identified with <TNS_Service_Name>.

3. To migrate trial randomization to a new randomization source database, use the following syntax:

```
RandomizationMigration.exe <StudyName> /NewRNDSchema <dbserver> /prompt <outfile> <RndMdbPathAndFilename>
```

where:

- *StudyName*—The name of the trial for which you are migrating randomization to an Oracle Database.
- *outfile*—The name of the log file used to record the results of the RandomizationMigration command.
- *dbserver*—The TNS name for the Oracle server to store the new randomization schema.
- *RndMdbPathAndFilename*—The complete path and file name of the Microsoft Access randomization source database.

The name of the data file and tablespace for the randomization use the InFormRND_<trialname> format. For example, InFormRND_pfst461.dbf for the data file name, and InFormRND_pfst461 for the tablespace name.

When prompted, enter the following parameters:

- OracleSysUID—The name of the Oracle user account with SYSDBA privileges.
- OracleSysPID—The password for the Oracle user account with SYSDBA privileges.
- NewRNDSchemaUID—The name of the owner of the new randomization schema.
- NewRNDSchemaPID—The password for the owner of the new randomization schema.

The results of the command are recorded in the output file you specify with the command.

- If the migration is successful, the output file will include the word **SUCCESS**.
- If the migration fails, the first line of the output file will be **ERROR**, followed by one or more error messages that indicate the cause of the failure.

4. Activate the randomization rule in the Oracle InForm application.
5. Restart the trial after the migration is complete.

Subject record transfer affidavit

The subject record transfer feature of the Oracle InForm application enables users to transfer a subject's clinical record to a new site. This feature is useful in situations where:

- A subject moves to a different location.
- A subject moves seasonally to another address.
- An investigator leaves a study and closes down a site.

When a user transfers a subject to another site, the Oracle InForm application displays an affidavit that provides guidance on the responsibility of the administrative user regarding moving a subject from one site to another. The Subject Record Transfer page in the base study provides default affidavit text.

- [Customizing the subject record transfer affidavit](#)
- [Subject transfer affidavit XML](#)

Customizing the subject record transfer affidavit

1. Copy the **sysform_PatientSiteChange.xml** file in the \InForm\XMLBase folder of the Oracle InForm software installation to the \Custom folder for your study.

Do not make changes directly in the sysform_PatientSiteChange.xml file.

2. Edit the affidavit portion of the <FORM> definition in the copy of the sysform_PatientSiteChange.xml file.

Within the affidavit text, you can use HTML characters for formatting and highlighting.

3. Add the edited copy of the file to the RSP file you use to load your study metadata into the study database.

Subject transfer affidavit XML

The <FORM> tag for the Subject Record Transfer page follows with the default affidavit text highlighted.

Caution:

Do not change anything in the form definition other than the highlighted text.

```
<FORM REFNAME="PSC_FORM" UUID="3389a7c6-cba5-46f2-b48f-8e034a28a349"
NOTE="<table border="0" cellpadding="4" cellspacing="0" width="100%" id="Table1">
<tr>
<td class="title"><b>Subject Record Transfer
Affidavit:</b>
</td>
</tr>
<tr>
<td><table class="tbl" border="1" cellpadding="4" cellspacing="0" width="100%">
```

```

    BORDERCOLOR="#003366" ID="Table2">
</TR>
<TD><TABLE BORDER="0" CELLPADDING="4"
CELLSPACING="0"
    WIDTH="100%" ID="Table3">
</TR>
<TD>
<P>
The sponsor takes responsibility for and has clear processes/procedures
in place around the handling of subject transfers and coordinating across
sites to ensure that:
</P>
<P>
1. The originating site produces or receives a certified copy of the current
CRF data created for all transferred subjects prior to the transfer.
</P>
<P>
2. The target site accepts responsibility for the management of any
outstanding queries and data cleaning following the subject record transfer,
since the originating site will no longer have modification access.
</P>
<P>
3. Trial version differences due to protocol amendments or country
specific data requirements are acknowledged and the sponsor has
appropriate regulatory approvals in place to support subject record transfer.
</P>
<P>
4. The subject(s) being transferred are fully enrolled and a Case Book
has been created for each subject.
</P>
</TD>
</TR>
</TABLE>
</TABLE>
</TABLE>
TITLE="Subject Record Transfer Form" MNEMONIC="PSC_FORM"
QUESTIONWIDTH="30" CONTROLWIDTH="70" TYPE="CUSTOMTRIAL" LANGUAGE="English">
. . .
<SECTIONREF REFNAME="PSC_SECT2" />
. . .
<SECTIONREF REFNAME="PSC_SECT" />
</FORM>

```

2

Managing a study

In this chapter:

- [About managing a study](#)
- [Common pfadmin commands](#)
- [Common Integration Manager commands](#)

About managing a study

After a study is installed, you might need to perform study management tasks such as stopping and starting a study or Oracle InForm application server, creating a new Oracle InForm application server, or removing a study or Oracle InForm application server. The pfadmin command utility is available for these tasks.

You can configure your Oracle InForm study to connect to additional applications. The Integration Manager is the application that manages these integrations. Use the Integration Manager commands to register, unregister, and monitor activity of integrated applications.

Common pfadmin commands

The following table lists the most commonly used pfadmin command options. For a complete description of all pfadmin command options, see [pfadmin](#).

Action	Command, issued from a Command Prompt window
View the status of Oracle InForm application servers and studies running under the Oracle InForm Service.	pfadmin view service
Start an Oracle InForm application server.	pfadmin start server <servername>
Start a study.	pfadmin start trial <trialname>
Stop a study.	pfadmin stop trial <trialname>
Stop an Oracle InForm application server.	pfadmin stop server <servername>

Common Integration Manager commands

The integration manager is used to safely start and stop integration applications during the automated deployment process. The following lists common commands used by administrators.

Action	Command, issued from a Command Prompt window
List all the integrated applications registered for a study.	IntegrationManager Query [-TRIAL] <study_name>

Action	Command, issued from a Command Prompt window
Register an integration application for a study.	IntegrationManager Register [-TRIAL] <study_name> Application <application_name> [application_parameters]
Unregister an integration application from a study.	IntegrationManager Unregister [-TRIAL] <study_name> Application <application_name>
Display IntegrationManager command help.	IntegrationManager /?

3

Using in-place revision for study versions

In this chapter:

- [About in-place revision of study versions](#)
- [Supported in-place revision changes](#)

About in-place revision of study versions

In-place revision (IPR) is the process of automating changes to non-clinical data in your study without changing the study version.

In-place revision changes are defined and initiated in the Oracle Central Designer application, and can be run at any time on a study that has been deployed to the InForm application. In the Oracle Central Designer application, item, itemset, or section selections can be made by study version (rather than by revision number).

If you want to migrate a deployed study to this release after you used MedML to make changes to non-clinical data without changing the study version, you must update the affected study objects in the Oracle Central Designer application for in-place revision to work as expected. If the study designs do not match, when you migrate and deploy the study, the changes made using MedML may be overwritten, or the deployment may fail.

Supported in-place revision changes

The Oracle Central Designer and Oracle InForm applications support many types of in-place revision changes. Any in-place revision changes not explicitly listed in the Oracle Central Designer or Oracle InForm documentation are not supported.

In-place revision changes may have no form or regulatory impact, may affect the meaning of data on a form, or may affect regulatory compliance.

The Oracle InForm MedML has been updated to support the in-place revision changes made in the Oracle Central Designer application. For more information, see the *Utilities Guide*.

- [Supported in-place revision changes with no regulatory or data impact](#)
- [Supported in-place revision changes that may affect the meaning of data on a form](#)
- [Supported in-place revision changes that may affect regulatory compliance](#)

Supported in-place revision changes with no regulatory or data impact

- Expand the year ranges in a date control.
- Change item properties to not required or SDV not required.
- Increase the length of a text, integer, or float field.
- Add hidden items to manage rule modifications.
- Add a new checkbox option for a control used to trigger forms in an Unscheduled Visit.

Supported in-place revision changes that may affect the meaning of data on a form

- Update item text to correct spelling or punctuation errors, provided the meaning is not changed.
- Add options to radio, pull down, or checkbox controls to allow sites to enter data accurately.
- Add items to an existing section.

Supported in-place revision changes that may affect regulatory compliance

- Remove items that contain data.
- Reduce the length of text, integer, or float fields.
- Decrease the precision of a float field.
- Reduce the maximum limit or increase the minimum limits on integer or float fields.
- Remove selections from pull down lists, radio controls, or checkbox controls.
- Decrease the date range for a date control.
- Change codelist selection labels.
- Remove UNK or NREQ in date controls.
- Remove date parts, such as hours and minutes.
- Change in control structure, such as adding levels of nesting.

4

Configuring the Reporting and Analysis module

In this chapter:

- [Configuring a study for the Reporting and Analysis module](#)

Configuring a study for the Reporting and Analysis module

In this section:

- [About configuring a study for the Reporting and Analysis module](#)
- [Giving an Oracle InForm study user reporting rights](#)
- [Configuring a study for the Reporting and Analysis module using the Oracle InForm Reporting Configuration utility](#)
- [Running the pfrinit utility](#)
- [Authorizing users for the Reporting and Analysis module](#)
- [Specifying a logo for Oracle InForm standard reports](#)
- [Configuring CRF links in standard reports](#)
- [Configuring CRF links in custom reports](#)

About configuring a study for the Reporting and Analysis module

Configuring a study for Cognos involves establishing communications between the Oracle InForm study and the Cognos Server and setting up the objects that are needed for reporting. To establish communications so that users can generate reports with the Reporting and Analysis module:

1. Run the Oracle InForm Reporting Configuration utility.
For more information, see [Configuring a study for the Reporting and Analysis module using the InForm Reporting Configuration utility](#).
 2. Run the pfrinit utility.
For more information, see [Running the pfrinit utility](#).
 3. Authorize users for the Reporting and Analysis module.
For more information, see [Authorizing users for the Reporting and Analysis module](#).
 4. Specify a logo for Oracle InForm standard reports.
For more information, see [Specifying a logo for InForm standard reports](#).
- [Clinical reporting package considerations](#)

Clinical reporting package considerations

After the clinical reporting package is generated, you can use the Cognos Reporting module to view the reporting tree.

Text controls in an Oracle InForm study can be set to accept more than 4000 characters. However, be aware that text stored in clinical views generated for reporting are truncated. If the text is longer than 4000 characters, the first 3986 characters are shown, and ****TRUNCATED**** appears at the beginning of the text in Cognos Reporting.

Giving an Oracle InForm study user reporting rights

1. Log in to the Oracle InForm study as a user who can update Oracle InForm user information.
2. Click **Admin**, and click the link for a user.
The User details page appears.
3. Click the **Group** tab.
4. On the Group page:
 - a. Select a **Rights Group** that includes the Reports right.
 - b. Associate the user with one or more sites.
 - c. In the **Reporting** list, select Publishers and either Site Users or Sponsor Users.
5. Click **Submit**, click **OK** in the confirmation dialog box, and then click **Return**.
6. Log out of the study.

Configuring a study for the Reporting and Analysis module using the Oracle InForm Reporting Configuration utility

- **Purpose**—Configure a study to work with Cognos.
 - **Wizard location**—Start > Apps > InForm Reporting Configuration.
 - **Where to run**—Server where the Oracle InForm core software is installed.
1. On the server where the Oracle InForm core software is installed, select **Start > Apps > InForm Reporting Configuration**.
The wizard title page appears.
 2. Click **Next**.
The Select Study page appears.
 3. Use the drop-down list to choose the study you want to configure for Cognos, and click **Next**.
The Cognos parameters page appears.
 4. Fill out the information as described in the table below, and click **Next**.

Cognos parameter	Description
Cognos Namespace	Custom Authentication Provider (CAP) namespace. The namespace created by the Cognos Analytics Customization for Oracle InForm wizard is informcap. The namespace can be shared by many studies, and should not be changed.
Gateway URI	External public URI that communicates with the Cognos Analytics Gateway Services

Cognos parameter	Description
	from an end user's browser. This Cognos parameter is set in the Cognos Analytics Gateway Customization for Oracle InForm wizard. The parameter setting is stored in the cogstartup.xml file. Example: http(s)://www.example.com:80(443)/cognos/bi
Dispatcher URI	Internal URI that the Oracle InForm server uses to communicate with the Cognos server. This Cognos parameter is set in the Cognos Analytics Customization for Oracle InForm wizard. The parameter setting is stored in the cogstartup.xml file and corresponds to the Reporting internal URI value on the Admin > System Configuration page of the Oracle InForm application. Used when running command line utilities that perform SDK operations, such as pfrinit and DecomTrial. Example: http://www.example.com:9300/p2pd/servlet/dispatch.
Root Folder	The top-level reporting folder for the study. Default: /content/folder[@name='<studyname>']

The Reporting database parameters page appears.

- Fill out the information as described in the table below, and click Next.

Field	Description
Reporting uses trial database	Use if the study and the Reporting database are on the same server.
Reporting uses separate database	Select if the Reporting database and the study database are in separate servers.
Database Connection String	Reporting database connection string (TNS Name). Use if Reporting and the Oracle InForm study are in different databases.
User name (same as trial user)	Reporting database study username must be the same as the Oracle InForm database study username.
Password	Reporting study password. Use if the study and the Reporting database are in different databases.

The Study URL and database connection information page appears.

6. Fill out the information as described in the table below, and click **Next**.

Field	Description
Trial URL	Authentication web service URL for the Oracle InForm study. Example: <code>https://<server_fully_qualified_domain_name>:<port>/<study_name>/ws/authservice/authentication.svc/</code>
Database Connection String	The connection string for the CAP database schema.
User	The user name for the CAP database schema owner.
Password	Password for the CAP database schema owner.

The Verification page appears.

7. Verify that the information on the page is correct and click **Next**.

The study is configured according to the information provided.

The Reporting configuration is complete page appears.

8. Click **Finish**.

Running the pfrinit utility

- **Purpose**—Configures Cognos for each study.
 - **Location of file**—`<InstallationDirectory>\InForm\Bin`
 - **pfrsetuptrial.xml**—Supplies database connection information used by the pfrinit utility.
 - **pfrinit**—Sets up connection information, permissions, and folder structures needed for accessing the Reporting and Analysis module from the Oracle InForm application.
 - **Where to perform**—The Oracle InForm application server.
1. On the Oracle InForm application server, open the pfrsetuptrial.xml file, located in the `<Installation_Directory>\InForm\bin` directory folder, and make the following changes:
 - **connectionstring**—Oracle connection string for the reporting database (in a single database configuration, use the study database connection string).
 - **dbuid**—Update the DBUID parameter with the UserID of the study owner.
 2. Save and close the PFRsetupTrial.xml file.
 3. Open a Command Prompt window, and type the following command:

```
pfrinit
```

You are prompted for the following parameters:

- **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 crnsysadmin user.
- **publisher_namespace**—Custom Authentication Provider (CAP) namespace. Enter informcap.
- **publisher_uid**—Oracle InForm study user who is a member of the following Reporting groups:
 - Publishers.
 - Either Sponsor Users or Site Users.
- **publisher_pass**—Password of the Oracle InForm study user.
- **dispatcher_url**—Internal URI that the Oracle InForm server uses to communicate with the Cognos Analytics server.
- **trial_name**—Name of the Oracle InForm study.
- **reportdb_pass**—Study PID.
- **in_place_upgrade**—Y/N. Indicate if the PFRInit command is being run as part of an in-place upgrade (required for an in-place upgrade).

For more information, see [pfrinit](#).

Authorizing users for the Reporting and Analysis module

In this section:

- [Oracle InForm access rights for reporting](#)
- [Authorization on the reporting server](#)

Oracle InForm access rights for reporting

Data access rights in the Reporting and Analysis module are inherited from the Oracle InForm study and adhere to the site associations and item blinding permissions that are in place for each user.

Additionally, to access the Reporting and Analysis module, an Oracle InForm user must be:

- Assigned to a rights group that includes the Oracle InForm **Reports** right. The Oracle InForm **Reports** right gives users access to the Reporting and Analysis module.
- A member of either the **Sponsor Users** or **Site Users** reporting group. This conveys the Cognos Analytics Consumer permissions that allow users only to run reports.

You can give users access to additional reporting rights by making sure that the users are assigned to one of the default reporting groups installed with the Oracle InForm software. For more information, see [Default reporting groups](#).

Authorization on the reporting server

Reporting authorizations on the reporting server rely on permissions that are defined in authorization namespaces on the reporting server.

All rights to create or run reports are governed by reporting authorizations in the Oracle InForm study, which is referenced by the Cognos Custom Authentication Provider (CAP).

- [The Cognos namespace](#)
- [Default reporting groups](#)

The Cognos namespace

Each reporting server references one master namespace that controls authorization for all studies. This namespace, the Cognos namespace, contains the Cognos objects, such as groups, roles, distribution lists, and contacts. During the Cognos Content Store initialization, predefined security entries that control access to specific Cognos features are created in this namespace.

Default reporting groups

As part of the initial Reporting and Analysis setup, the pfrinit utility imports the PFRsetupTrial_<lang>.xml file, which loads the following predefined reporting groups into the Cognos namespace for an Oracle InForm study.

In the following table, some groups are described as custom groups added by the Oracle InForm application. By default, these groups have no corresponding group or role in the Cognos namespace. The groups are added to the Cognos namespace by the pfrinit utility.

Oracle InForm reporting group	Cognos namespace group or role	Provides these permissions
Ad Hoc Reporting Users	Query Users	Can run the Cognos Reporting utility. Users also have the same rights as members of the Cognos Analytics Consumers namespace role.
Authors	Authors	- In Cognos Reporting—Authors can create, edit, or run reports that use clinical or operational model packages. Authors cannot create, edit, or run reports that contain custom HTML and/or custom SQL. - In Cognos Connection—Authors can run reports that use clinical or operational model packages. Authors cannot run reports that contain custom HTML and/or custom SQL.
No equivalent group	Consumers	Can run reports in the Public folders. These reports can be Standard Reports or custom reports that users create. Every user that has the Oracle InForm Reports rights group right is by default a member of the Consumers group. This group is visible only as a Cognos namespace role.

Oracle InForm reporting group	Cognos namespace group or role	Provides these permissions
Directory Administrators	Directory Administrators	- Can view Groups and Roles, but cannot view the Capabilities. The ability to make any changes to Cognos Capabilities and Cognos Groups and Roles have been removed from this group. - Can accept only Oracle InForm Support user types. Sponsor or Site users can no longer be added to this group.
Publishers	Publishers	Can create, change, schedule, or delete all content, including reports (Cognos Reporting) to a Public folder. When users in the Publishers group run a report in a Public folder, their prompt selections are saved with the report.
Report Administrators	Report Administrators	Can administer permissions for all public content including folders and reports.
Server Administrators	Server Administrators	Can accept only Oracle InForm Support user types. Sponsor or Site users can no longer be added to this group.
Site Users	Site Users	Access to all Standard Reports except for by User reports. Users are automatically assigned to this group based on their user type. Custom group added by the Oracle InForm application.

Oracle InForm reporting group	Cognos namespace group or role	Provides these permissions
Sponsor Users	Sponsor Users	Access to all Oracle InForm standard reports, except password-related data. Users are automatically assigned to this group based on their user type. Custom group added by the Oracle InForm application.  Tip : To allow sponsor users to access password data, assign the user to the Sponsor Users group and the User Admin Info Data User group.

Oracle InForm reporting group	Cognos namespace group or role	Provides these permissions
No equivalent group	System Administrator	The superuser role in Cognos. This user has full control of every setting for every study that can be set in a given Cognos server. There is no equivalent Oracle InForm reporting group. At initial setup, all users have this right. You should identify a small group of highly trusted users and directly assign them to the Cognos namespace System Administrator role. Then, remove the Everyone group from this role.
User Admin Info Data Users	User Admin Info Data Users	Access to user data including password related data. Custom group added by the Oracle InForm application.
User Info Data Users	User Info Data Users	Access to user data except password related data. Custom group added by the Oracle InForm application.

Specifying a logo for Oracle InForm standard reports

You can specify a company logo to appear in your standard reports.

If you do not want a logo to appear in the standard reports, you must place a blank image (named logo.gif) in the location that is specified.



Note:

If you do not include the blank graphic file, a missing graphic icon appears on your standard reports.



Note:

If you want to include a logo image in a custom report, the file you upload to the specified location can be used for this purpose.

1. Create a file called logo.gif.
2. Copy the logo.gif file to the following location on the Cognos Analytics Report Server. For example:

```
<c11 install directory>\webcontent\bi\<TrialName>
```

For example:

e:\Cognos\c11\webcontent\bi\pfst62\logo.gif.

If there is no image file available in the *<c11 install directory>\webcontent\bi\<TrialName>* folder, reports that contain images might crash when exporting to Microsoft Excel or PDF.

To prevent this from happening, make sure that communications between the Report Servers and the Gateway Server use the same the protocol (both servers must use either HTTP or HTTPS).

Configuring CRF links in standard reports

The Oracle InForm Item standard reports contain links in the Form columns that allow a user to easily open the relevant Oracle InForm form from the report output. This functionality is available in the:

- CRF Item Listing report
- Source Verification Listing report
- CRF Frozen Status report

To create the form links in a standard report:

- Run the pfadmin SETSERVER TrialURL command and provide the URL for your study. For more information, see [pfadmin](#).

Configuring CRF links in custom reports

If you create custom reports using Cognos Reporting, and those reports include form data, you can create links to the Oracle InForm forms in the custom reports.

To create the form links in a custom report:

1. Run the pfadmin SETSERVER TrialURL command and provide the URL for your study. For more information, see [pfadmin](#).
2. Create the custom reports.
3. In the Cognos Reporting application:
 - a. Add a join to RT_INFORMSYSCONFIG to the report.
This allows the report to access the study URL that you specified in the pfadmin SETSERVER TrialURL command.
 - b. Concatenate the study URL with the INFORMPARTIALURL_CRFVIEW value to provide the full link to a form.
 - c. Add JavaScript to allow the user to click a Cognos HTML cell.

To see an example of the required JavaScript, see one of the following Oracle InForm standard reports:

- CRF Item Listing report
- Source Verification Listing report
- CRF Frozen Status report

5

Removing reporting objects and an Oracle InForm study

In this chapter:

- [About removing reporting objects and an Oracle InForm study](#)
- [Deleting study-specific information from the Cognos environment](#)
- [Removing an Oracle InForm study](#)

About removing reporting objects and an Oracle InForm study

Perform the following steps to remove the Reporting and Analysis components and Oracle InForm studies



Note:

For information about how to uninstall the core Oracle InForm software, the Cognos software, and the customizations for the Reporting and Analysis module, see the *Installation Guide*.

1. Stop your study.
2. Delete study-specific information from the Cognos environment.
For more information, see [Deleting study-specific information from the Cognos environment](#).
3. Remove the Oracle InForm study.
For more information, see [Removing an InForm study](#).

Deleting study-specific information from the Cognos environment

To remove study information from the Cognos environment, you must be an Oracle InForm user with the following credentials:

- Access to the study to be removed.
- Member of a rights group that includes the Reports right.
- Member of the following Reporting groups:
 - Either Site Users or Sponsor Users.
 - Directory Administrators.
 - Either Report Administrators or Server Administrators.

To remove study information from the Cognos environment:

1. Log in to the Reporting and Analysis module as a System Administrator like the crnsysadmin user.
2. On the left of the page, click **Manage**, and click **Administration console**.
3. In the top-left of the page, select the **Configuration** tab.
4. On the right of the page, click **More**.
5. Click **Delete**, and confirm the deletion.
6. Close the Cognos Administration tab or window.
7. On the left of the page, click **Team content**, and select the folders that are related to the study (for example, **InForm Trial Management for PFST62**).
8. For each study-related folder, hover over the folder name, and on the right, click the **More** icon (⋮).
9. Click **Delete**, and confirm the deletion.

Removing an Oracle InForm study

- **Purpose**—Removes an Oracle InForm study and server.
- **Where to perform**—Server where the Oracle InForm core software is installed.

1. Stop the study, using the following command:

```
pfadmin stop trial <studyname>
```

2. Remove the study, using the following command:

```
pfadmin remove trial <studyname>
```

or

To remove the DSNs from ODBC data source administration at the same time, use the following command

```
pfadmin remove trial <studyname> /DSN
```

3. If you did not remove the study DSN with the pfadmin utility, remove it through the Windows Data Sources (ODBC) utility:
 - a. Select **Start > Administrative Tools > Data Sources (ODBC)**.
 - b. Select the **System DSN** tab.
 - c. Select the study DSN, and click **Remove**.
 - d. If the study has a randomization or CDD DSN, remove those, as well.
 - e. Click **OK**.
4. After removing all studies from an Oracle InForm server, remove the server with the following command:

```
pfadmin remove server <servername>
```

5. Back up the study database.

6. Remove the study user from the database. As the pfdbadmin user, issue the following SQL*Plus command:

```
drop user <study_uid> cascade;
```

 Caution:

When you perform this step, all study data is removed. Make sure that the backup is complete before you drop the study user.

6

Performance tuning

In this chapter:

- [Controlling the load behavior](#)
- [Updating statistics in a production environment](#)
- [Configuring an ODBC connection](#)
- [Resizing virtual memory](#)
- [Removing preferential treatment from foreground applications](#)
- [Optimizing Windows for network applications](#)
- [Monitoring the Windows Event Logs](#)
- [Moving and enlarging the MS DTC logs](#)
- [Deploying SQL profiles](#)

Controlling the load behavior

Studies with a very large number of subjects can take a long time to start up, because all subjects are loaded into memory cache. To confirm whether this problem is occurring, check the Oracle InForm Performance Monitor utility.

1. Select **Start > Apps > InForm Performance Monitor**.
2. Start the study.
If load behavior is being affected by the number of subjects, the Oracle InForm Performance Monitor utility shows many 'select * from DCV_PatientCRF where PatientID=xxxx' SQL statements.

You can modify registry settings to help alter the load behavior to make study startup more efficient. The settings are in HKEY_LOCAL_MACHINE\SOFTWARE\ORACLEHS\InForm\PFMngrTrial\PatientCacheLoadingMode.

The following registry setting values control load behavior:

- **ondemand**—The study starts immediately and the subject data is loaded into cache only when an Oracle InForm user tries to access data for that subject. This option provides the fastest study startup, but results in slow performance the first time a subject is accessed. Subjects who are not accessed are not cached at all, which means they do not consume memory or require other server resources to load them.
- **async**—The study starts immediately and the subject cache continues to load in the background. When an Oracle InForm user tries to access data for a subject that is not yet loaded, the subject is loaded on demand. Performance may be slow the first time the subject is accessed.
- **sync**—Default. Standard Oracle InForm behavior. At start up, all subjects are loaded into memory cache.

Updating statistics in a production environment

To ensure satisfactory performance, Oracle recommends that you do the following:

- Analyze all tables and indexes.
- Refresh database statistics periodically.
In a production environment, refreshing one time per day during the maintenance window is usually sufficient. However, Oracle recommends that you also refresh the database statistics if you add a large amount of data or metadata to a study.

To update the statistics, you can run the `updatestats.cmd` script, located in the `<Installation_Directory>\bin\dbora` directory. Type the following in a Command Prompt window:

```
sqlplus <pfdbadmin_uid>@<connect_string> @updatestats.cmd <trialUID>
```

When prompted, enter the password for the `pfdbadmin` database user.

Do not use the `dbms_utility.analyze_schema` procedure with the `COMPUTE` or the `FOR TABLES` option on any production servers. The recommended procedure is to analyze each table and index with the `ESTIMATE` option (35 percent is adequate).

Configuring an ODBC connection

You can configure Oracle ODBC connection pooling to provide a longer connection time by changing the Timeout value.

1. Select **Start > Administrative Tools > ODBC Data Sources (64-bit)**.
The ODBC Data Source Administrator window appears.
2. Select the **Connection Pooling** tab.
3. Double-click **Oracle in <Oracle_Client_Home>**.

Note:

Be careful *not* to double-click Microsoft ODBC for Oracle.

The Set Connection Pooling Attributes dialog box appears.

4. Make sure that the **Pool connections to this driver** radio button is selected.
5. In the **Time that unused connections remain in the pool in seconds** field, set the pooling timeout value. The recommended pooling timeout is 1.5 x MSDTC Timeout Value (about 450 seconds).

If the pooling timeout value is too short, the connection refreshes too frequently. If the pooling timeout value is too long, the connection consumes too many resources.

6. Click **OK** in each dialog box.

Resizing virtual memory

The Oracle InForm software uses virtual memory (disk space simulated as memory) aggressively. It is recommended that you create a large paging file in a location that is different from the default location, particularly on a drive with lots of disk space.

1. Click **Start > Control Panel > System > Advanced system settings**.
The System Properties dialog box appears.
2. Click the **Advanced** tab.
3. In the **Performance** section, click **Settings**.
The Performance Options dialog box appears.
4. Click the **Advanced** tab.
5. Click **Change**.
The Virtual Memory dialog box appears.
6. In the **Drive (Volume Label)** section, select a drive in which to place the virtual memory.
7. Type a value in the **Initial Size (MB)** field. The sum of physical RAM plus 11 is recommended, or you can use the Recommended size.
8. Type a value in the **Maximum Size (MB)** field. The Initial Size (MB) x 1.5 or 2 is recommended.
9. Click **Set**.
10. Click **OK** in each dialog box.

Removing preferential treatment from foreground applications

To provide more resources for background applications in Microsoft Windows Server, you can remove preferential treatment from foreground applications.

1. Click **Start > Control Panel > System > Advanced system settings**.
The System Properties dialog box appears.
2. Click the **Advanced** tab.
3. In the **Performance** section, click **Settings**.
The Performance Options dialog box appears.
4. Click the **Advanced** tab.
5. Select **Background services**.
6. Click **OK** in each dialog box.

Optimizing Windows for network applications

1. Click **Start > Control Panel > Network and Sharing Center > Local Area Connection**.
The Local Area Connection Status dialog box appears.
2. Click **Properties**.
The Local Area Connection Properties dialog box appears.

3. On the Networking tab, select **File and Print Sharing for Microsoft Networks**, and click **Properties**.

The File and Printer Sharing for Microsoft Networks Properties dialog box appears.

4. Click **Maximize Throughput for Network Applications**.
5. Click **OK**, and in the Local Area Connection Status dialog box, click **Close**.

Monitoring the Windows Event Logs

The Oracle InForm application logs events to the Application Event log. For optimum performance, make sure to manually clear the log periodically, or wrap events so that the oldest events are overwritten when the log's capacity is reached.

1. Click **Start > Administrative Tools > Event Viewer**.

The Event Viewer window appears.

2. Expand **Windows Log**, right-click **Application**, and select **Properties**.

The Application Properties dialog box opens.

3. Set the **Log size** options according to your event log monitoring policy. You can:
 - Overwrite events as needed.
 - Overwrite events older than n days.
 - Clear the log manually.

It is recommended that you overwrite events as needed.

Note:

The Application Event log holds a record of all Oracle InForm login attempts. If you do not want to lose any of the Oracle InForm login information, set the Log Settings accordingly.

For production servers, it is recommended that you save event logs periodically.

Moving and enlarging the MS DTC logs

The MS DTC logs are generated by default in the %SYSTEMROOT%\SYSTEM32\DTCLog folder. It is recommended that you place the logs on a different disk, and increase the log file size.

To move locations for MS DTC logs in Microsoft Windows Server:

1. In Windows Explorer, create a new folder for the DTC logs.
2. Select **Start > Administrative Tools > Component Services**.
3. Expand **Component Services > Computers > My Computer > Distributed Transaction Coordinator**.
4. Right-click **LocalDTC**, and select **Properties**.
5. Select the **Logging** tab.
6. In the **Log Information** section, change the **Capacity** to 16 MB or higher.

 Note:

If you experience an error that the log file is full, increase the capacity to 100 MB.

7. Specify the location for the log file, and click **OK**.
8. When prompted, click **Yes** to restart the MSDTC service.
9. Delete the original MS DTC directory through Windows Explorer.

Deploying SQL profiles

SQL profiles can be used to improve performance.

To deploy SQL profiles:

1. Unzip InForm_SQLProfiles.zip.(located in the <Installation_Directory>\InForm\Bin\DBOra\ReviewSchema folder).
2. Connect to SQLPlus as a user with the proper privileges:
 - ADVISOR role
 - CREATE ANY SQL PROFILE PRIVILEGE
 - ALTER ANY SQL PROFILE PRIVILEGE
 - DROP ANY SQL PROFILE PRIVILEGE
 - EXECUTE PRIVILEGE ON DBMS_SQLTUNE

 Note:

The user can be of any type, such as system user or pfadmin user, as long as a sys user has granted them the proper privileges.

3. Create a staging table in the destination database.

```
EXEC DBMS_SQLTUNE.CREATE_STGTAB_SQLPROF (table_name =>
    'STGTAB_SQLPROF_DB006');
```

4. Import the data to the destination database.

```
imp <user>/<pwd>@<instance> tables=('STGTAB_SQLPROF_DB006') file=
InForm_SQLProfiles.dmp log=imp.log
ignore=y
```

5. Create SQL Profiles in the destination database using the data stored in the staging table.

```
EXEC DBMS_SQLTUNE.UNPACK_STGTAB_SQLPROF(replace => TRUE,
    staging_table_name =>
    'STGTAB_SQLPROF_DB006');
```

6. Verify that the profiles imported correctly.

```
Select name, created from dba_sql_profiles;
```

7

Command and script reference

In this appendix:

- [admindb](#)
- [exportdb](#)
- [importdb](#)
- [create_cap_table.sql](#)
- [DecomTrial](#)
- [DeployBackup.cmd](#)
- [DeployEnd.cmd](#)
- [DeployRestore.cmd](#)
- [ExportMigrationFiles](#)
- [ImportMigrationFiles](#)
- [grant_dba_privs.sql](#)
- [grant_user_privs.sql](#)
- [ImportUtility](#)
- [informprepora](#)
- [pfadmin](#)
- [pfcognosconfig](#)
- [pfrinit](#)
- [PostDeployWorkaround.cmd](#)
- [PreDeployWorkaround.cmd](#)
- [RequestTime.cmd](#)

admindb

Purpose

Creates the InForm Admin database if you did not set it up during the Oracle InForm core software installation by selecting the **Install Admin DB** checkbox.

Location

<Installation_Directory>\InForm\bin\DBOra folder.

Usage

```
admindb [connection string] [dbadmin-uid]  
[dbadmin-pass] [pfdbadmin-uid] [pfdbadmin-pass]
```

```
admindb [connection string] /prompt  
admindb [connection string] /accountparams:  
[parameterfile]
```

Where:

- **connection string**—Database TNS Instance name.
- **dbadmin-uid**—Oracle InForm Admin Database UID (User name).
- **dbadmin-pid**—Oracle InForm Admin Database PID (Password).
- **pfdbadmin-uid**—pfdbadmin Database UID.
- **pfdbadmin-pass**—pfdbadmin Database PID.
- **parameterfile**—Path to text file containing parameters.

Command line prompts

If using prompting, you are prompted for the following parameters:

- **admindbuid**—Oracle InForm Admin Database UID (User name).
- **admindbpid**—Oracle InForm Admin Database PID (Password).
- **pfdbauid**—pfdbadmin Database UID.
- **pfdbapid**—pfdbadmin Database PID.

Parameter file contents

When using a parameter file, the path to a text file is given. The format of the parameter file is parameter=value, with each value on a separate line, and no spaces between the parameter name, =, and value.

The parameter file must contain the following parameters:

- AdminDbUid=[*dbadmin-uid*]
- AdminDbPid=[*dbadmin-pid*]
- pfdbauid=[*pfdbadmin-uid*]
- pfdbapid=[*pfdbadmin-pid*]

Example

```
admindb trial1 /prompt
```

```
admindb trial1 /accountparams:myparams.txt
```

```
admindb trial1 informadmin myinformadminpassword pfdbadmin mypfdbadminpassword
```

exportdb

Purpose

Exports the given database schema.

Location

<Installation_Directory>\InForm\bin\DBOra folder.

Usage

exportdb [connection string] [dump-file-directory-path] [dump-file-name] /prompt [log options]
exportdb [connection string] [dump-file-directory-path] [dump-file-name] /
accountparams:[paramfile] [log options]

exportdb [connection string] [dump-file-directory-path] [dump-file-name] [version] /prompt [log options]

exportdb [connection string] [dump-file-directory-path] [dump-file-name] [version] /
accountparams:[paramfile] [log options]

Where:

Parameter	Description
connection-string	Database TNS Instance Name
dump-file-directory-path	Physical path on database server where the dump should be created. The path must conform to the proper OS path format, and that it should be expected that the path is case-sensitive.
dump-file-name	Filename to give the exported dump file. Note that the name must conform to the proper OS format for the database server, and that it should be expected that the name is case-sensitive.
version	Target database version. Only specify if the dump will be imported into a lower version database.
paramfile	Path to text file containing the list of parameters.

Parameter	Description
log options	Optional parameters for specifying the log file name and/or location. The log file defaults to being named ExportDB.log. The log file path defaults to the current working directory. Options: • /LogFile:[<i>filespec</i>] – <i>filespec</i> = fully qualified name and path for created log file. If a relative path is given, it is based from the current working folder. – Overrides the <i>logfile-path</i> to be the resolved path to the given <i>filespec</i>. – Overrides the <i>logfile-name</i> to be the resolved name of the given <i>filespec</i>. – Do not specify this if either of the other logging options are specified. • /LogFilePath:[<i>pathspec</i>] – <i>pathspec</i> = fully qualified path to create the log file in. If a relative path is given, it is based from the current working folder. – Overrides the <i>logfile-path</i> to be the resolved path to the given <i>pathspec</i>. – Does not change <i>logfile-name</i>. • /LogFileName:[<i>filename</i>] – <i>filespec</i> = Filename for the log file. – Overrides the <i>logfile-name</i> for the log file. – Does not change <i>logfile-path</i>.

Command line prompts

If using prompting, you are prompted for the following parameters:

- **Schema Owner User ID**—Database trial/schema owner user ID.
- **Database Administrator User Name**—Name of the Database Administrator User (for example, pfdbadmin).
- **Database Administrator User Password**—Password for the Database Administrator User.

Parameter file contents

When using a parameter file, the path to a text file is given. The format of the parameter file is parameter=value, with each value on a separate line, and no spaces between the parameter name, =, and value.

The parameter file *must* contain the following parameters

- **Trial_user**—Trial/Schema Owner User ID for the study to export.
- **Admin_user**—Name of the Oracle InForm Database Administrator (for example, pfadmin)
- **Admin_user_pass**—Password for the Oracle InForm Database Administrator User.

Example

```
exportdb trial1 /backups backup.dmp /prompt
```

```
exportdb trial1 /backups backup.dmp /accountparams:myparamfile.txt
```

```
exportdb trial1 /backups backup.dmp /prompt  
/logfilepath:c:\exportlogs
```

importdb

Purpose

Imports the given database schema.

Location

<InstallationDirectory>\InForm\Bin\DBOra folder.

Usage

```
importdb [connection-string] [dump-file-directory-path] [dump-file-name] [from-userid] /Prompt  
[log options] [/AdditionalParametersFile:optionsfile] [/NotTrial]
```

```
importdb [connection-string] [dump-file-directory-path] [dump-file-name] [from-userid] /  
AccountParams:[paramfile] [log options] [/AdditionalParametersFile:options-file] [/NotTrial]
```

Where:

Parameter	Description
connection-string	Database TNS Instance Name.
dump-file-directory-path	Physical path on database server where the dump is located.  Note: The path must conform to the proper OS path format, and the path is expected to be case-sensitive.

Parameter	Description
dump-file-name	Filename of the dump file to import.  Note: The name must conform to the proper OS format for the database server, and the name is expected to be case-sensitive.
from-userid	Original schema owner User ID when exported.
paramfile	Path to text file containing the list of parameters.
log-options	Optional parameters for specifying the log file name and/or location. The log file defaults to being named ImportDB.log. The log file path defaults to the current working directory. Options: • /LogFile:[<i>filespec</i>] – <i>filespec</i> = fully qualified name and path for created log file. If a relative path is given, it is based from the current working folder. – Overrides the <i>logfile-path</i> to be the resolved path to the given <i>filespec</i>. – Overrides the <i>logfile-name</i> to be the resolved name of the given <i>filespec</i>. – Do not specify this if either of the other logging options are specified. • /LogFilePath:[<i>pathspec</i>] – <i>pathspec</i> = fully qualified path to create the log file in. If a relative path is given, it is based from the current working folder. – Overrides the <i>logfile-path</i> to be the resolved path to the given <i>pathspec</i>. – Does not change <i>logfile-name</i>. • /LogFileName:[<i>filename</i>] – <i>filespec</i> = Filename for the log file. – Overrides the <i>logfile-name</i> for the log file. – Does not change <i>logfile-path</i>.

Parameter	Description
options-file	Path to a text file containing list of additional import parameters. These options are added to the default import parameters, allowing customization of the import operation. Operations such as remap_schema and remap_tablespace may be added to the file, each on a separate line, with no intervening spaces. For example: remap_schema=oldschemaownerid:newschemaownerid remap_tablespace=oldtablespacename:INFO RM See the impdp documentation for details on import options.
/NotTrial	Prevents pre-import tablespace analysis of the schema prior to importing. This behavior is <i>only</i> supported for Trial Schemas, and should be prevented through this parameter for any other type of schema being imported.

Command line prompts

If using prompting, you are prompted for the following parameters:

- **To User Schema Owner User ID**—Database trial/schema owner user ID for the schema to which the dump should be imported.
- **To User Schema Owner User Password**—Password for the schema owner user. The password must conform to local restrictions.
- **Database Administrator User Name**—Name of the Database Administrator User (for example, pfdbadmin).
- **Database Administrator User Password**—Password for the Database Administrator User.

Parameter file contents

When using a parameter file, the path to a text file is given. The format of the parameter file is parameter=value, with each value on a separate line, and no spaces between the parameter name, =, and value.

The parameter file *must* contain the following parameters:

- **Trial_user**—Trial/Schema Owner User ID for the schema to which the dump should be imported.
- **Trial_user_pass**—Trial/Schema Owner User Password. Password must conform to local restrictions.
- **Pfdbadmin_user**—Name of the Oracle InForm Database Administrator User (for example, pfdbadmin).
- **Pfdbadmin_user_pass**—Password for the Oracle InForm Database Administrator User.

The parameter file *may* contain the following parameters:

- **AdditionalParametersFile**—*options-file*—Identical to specifying on the command line. See command line parameter explanation for details. Only one additional parameter file may be specified, either on the command line or in the parameter file, not both.

Example

```
importdb trial1 /backups backup.dmp pfst63uid /prompt

importdb trial1 /backups backup.dmp pfst63luid
/accountparams:myparamfile.txt

importdb trial1 /backups backup.dmp pfst6211 /prompt
/logfilepath:c:\exportlogs

importdb trial1 /backups other.dmp oldotherschemuid /prompt
/nottrial
```

create_cap_table.sql

Purpose

Creates the TRIAL_URLS table for the PFCAPAdmin user.

Location

Folder where the reporting software is located, for example,
<Installation_Directory>\InForm\bin\DBOra\Reporting.

Usage

@create_cap_table.sql

Notes

Run from SQL*Plus with /nolog.

Errors are recorded in the create_cap_table.log file.



Note:

The Oracle InForm database installation and administration scripts are designed to be run using the Oracle InForm Application Server. The scripts can also be run from the Oracle Database home on an Oracle InForm Reporting Server. Running them from a different Windows Oracle client or from a non-Windows Oracle client or database home may work, but is not supported.

DecomTrial

Purpose

Securely removes Oracle InForm study components (study folders, clinical package, operational package, DSN entries, and Oracle InForm study user accounts) from the Reporting and Analysis module.

Location

The Oracle InForm application server folder on the Oracle InForm application server. For example, `<Installation_Directory>\InForm\bin`.

Usage

DecomTrial [*SysAdminNamespace SysAdminUsername TrialNamespace TrialUsername CognosDispatcherURI TrialName* [*<company_code>*]]

Option	Parameter
<i>SysAdminNamespace</i>	Oracle Directory Server admin namespace.
<i>SysAdminUsername</i>	User name for the Cognos system administrator.
<i>TrialNamespace</i>	Custom Authentication Provider (CAP) namespace. Enter informcap.
<i>TrialUsername</i>	Oracle InForm study user who is a member of the following Reporting groups: • Publishers. • Either Sponsor Users or Site Users.
<i>CognosDispatcherURI</i>	Internal URI that the Oracle InForm server uses to communicate with the Cognos Analytics server.
<i>TrialName</i>	Name of the Oracle InForm study.
<i>company_code</i>	The organization ID. Optional. This parameter is required only for Oracle-hosted studies in a single sign-on environment.

Command line prompts

Depending on the syntax used with the DecomTrial command, you are prompted for the following parameters:

- **System Administrator namespace**—Oracle Directory Server admin namespace.
- **System Administrator username**—User name for the Cognos system administrator.
- **Trial namespace name**—Custom Authentication Provider (CAP) namespace. Enter informcap.
- **Trial user username**—Oracle InForm study user who is a member of the following Reporting groups:
 - Publishers.
 - Either Sponsor Users or Site Users.
- **Cognos dispatcher URL**—Internal URI that the Oracle InForm server uses to communicate with the Cognos Analytics server.
- **Trial name**—Study name.
- **Company Code**—The organization ID.
Optional. Reserved for Oracle-hosted studies in a single sign-on environment.
- **System Administrator password**—Password for the Cognos system administrator.
- **Trial user password**—Password for the Oracle InForm study user.

 Note:

You are always prompted for the System Administration password and Trial user passwords when you run DecomTrial.

For legacy purposes, 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.

Parameter file contents

You can pass the following parameters in a parameter file:

- sysadmin_namespace=Oracle Directory Server admin namespace.
- sysadmin_uid=User name for the Cognos system administrator.
- trial_namespace=Custom Authentication Provider (CAP) namespace. Enter informcap.
- trial_user=Study user.
- dispatcher_url=Internal URI that the Oracle InForm server uses to communicate with the Cognos Analytics server.
- trial_name=Study name.
- company_code=OrgID assigned for an single sign-on study.

Example

```
DecomTrial OHSI crnsysadmin informcap mmartin http://server.example.com:9300/p2pd/  
servlet/dispatch pfstcardio blank
```

DeployBackup.cmd

Purpose

Backs up a study under a custom archive file name and path. If the operation is successful, the command returns 0. Otherwise, it returns 1 to signal the error.

Location

Deployment root folder, as defined in the DeployRoot registry value under HKEY_LOCAL_MACHINE\SOFTWARE\OracleHS\InForm. By default, it is the InFormDeploy folder on the drive where the Oracle InForm application is installed. For example: E:\InFormDeploy.

Usage

```
DeployBackup <Study_Name> <Archive_File_Name> <TNS_Service_Name> <Archive_Path>  
<Parameters_File_Name>
```

Option	Parameter
Study_Name	Name of the study to be backed up.
Archive_File_Name	Name of the backup file.

Option	Parameter
TNS_Service_Name	Local Net Service Name for the remote database service.
Archive_Path	Path on the database server where the backup file is saved.
Parameters_File_Name	Name of the parameters file that contains database credentials. The parameters file must contain the following values: <pre>trial_user=<study_schema_user_name></pre> <pre>trial_user_pass=<study_schema_user_password></pre> <pre>orasystem_user=<admin_user_name></pre> <pre>orasystem_user_pass=<admin_user_password></pre>

DeployEnd.cmd

Purpose

Applies custom system tasks after a successful or failed study deployment. If the operation is successful, the command returns 0. Otherwise, it returns 1 to signal the error.

Location

Deployment root folder, as defined in the DeployRoot registry value under HKEY_LOCAL_MACHINE\SOFTWARE\OracleHS\InForm. By default, it is the InFormDeploy folder on the drive where the Oracle InForm application is installed. For example: E:\InFormDeploy.

Usage

DeployEnd <Study_Name> <Deployment_Status>

Option	Parameter
Study_Name	Name of the deployed study.
Deployment_Status	0 for successful study deployment 1 for failed study deployment

DeployRestore.cmd

Purpose

Restores a backed up study from a specified archive file. If the operation is successful, the command returns 0. Otherwise, it returns 1 to signal the error.

Location

Deployment root folder, as defined in the DeployRoot registry value under HKEY_LOCAL_MACHINE\SOFTWARE\OracleHS\InForm. By default, it is the InFormDeploy folder on the drive where the Oracle InForm application is installed. For example: E:\InFormDeploy.

Usage

DeployRestore <Study_Name> <Archive_File_Name> <TNS_Service_Name> <Archive_Path> <Parameters_File_Name>

Option	Parameter
Study_Name	Name of the study to be restored.
Archive_File_Name	Name of the backup file.
TNS_Service_Name	Local Net Service Name for the remote database service.
Archive_Path	Path on the database server where the backup file is saved.
Parameters_File_Name	Name of the parameters file that contains database credentials. The parameters file must contain the following values: <pre>trial_user=<study_schema_user_name></pre> <pre>trial_user_pass=<study_schema_user_password></pre> <pre>orasystem_user=<admin_user_name></pre> <pre>orasystem_user_pass=<admin_user_password></pre>

ExportMigrationFiles

Purpose

Exports the Oracle InForm study and related configurations for migration.

Creates the database dump(s) as named on the database server in the given location, creating logs and export files in the specified log folder.

**Note:**

The ExportMigrationFiles command copies the Oracle InForm Publisher configuration, if it is present.

Location

<Drive:>\OracleHS\InstallSupport

Usage

ExportMigrationFiles [*connection string*] /prompt [*log options*]

ExportMigrationFiles [*connection string*] /accountparams:[*paramfile*] [*log options*]

Where:

Parameter	Description
connection-string	Database TNS Instance Name
paramfile	Path to text file containing the list of parameters.
log options	Optional parameters for specifying the log file name and/or location. The log file defaults to being named ExportMigrationFiles.log. The log file path defaults to the current working directory. Options: • /LogFile:[<i>filespec</i>] – <i>filespec</i> = fully qualified name and path for created log file. If a relative path is given, it is based from the current working folder. – Overrides the <i>logfile-path</i> to be the resolved path to the given <i>filespec</i>. – Overrides the <i>logfile-name</i> to be the resolved name of the given <i>filespec</i>. – Do not specify this if either of the other logging options are specified. • /LogFilePath:[<i>pathspec</i>] – <i>pathspec</i> = fully qualified path to create the log file in. If a relative path is given, it is based from the current working folder. – Overrides the <i>logfile-path</i> to be the resolved path to the given <i>pathspec</i>. – Does not change <i>logfile-name</i>. • /LogFileName:[<i>filename</i>] – <i>filespec</i> = Filename for the log file. – Overrides the <i>logfile-name</i> for the log file. – Does not change <i>logfile-path</i>.

Command line prompts

You are prompted for the following parameters:

- **Oracle InForm Database Administrator User Name**—Name of the Oracle InForm Database Administrator User (for example, pfdbadmin).

- **Oracle InForm Database Administrator User Password**—Password for the Oracle InForm Database Administrator User.
- **Trial Schema Owner User ID**—Trial database schema owner user ID.
- **Trial Schema Owner User Password**—Trial database schema owner's password for the study.
- **Database Dump File Directory Path**—Location on the Oracle InForm Database Server where the dump file(s) are to be created. Must conform to the Database Servers path format (such as, path separators are \ on Windows, / on Linux).

 Note:

The physical path must exist before you run the ExportMigrationFiles command.

- **Trial Database Dump Name**—File name for the Trial Schema Database Dump that is being created. If not specified, it will be defaulted to **<trial-schema-owner-id>.dmp**.

Parameter file contents

When using a parameter file, the path to a text file is given. The format of the parameter file is parameter=value, with each value on a separate line, and no spaces between the parameter name, =, and value.

The parameter file *must* contain the following parameters:

- **Pfdbadmin_user**—Name of the Oracle InForm database administrator (for example, pfdbadmin).
- **Pdbadmin_user_pass**—Password for the Oracle InForm database administrator user.
- **Trial_user**—Trial/Schema Owner User ID for the study to export.
- **Trial_user_pass**—Password for the Trial/Schema Owner User for the study to export.
- **Dump_file_dir_path**—Location on the Database Server where the import dump file(s) are located.

The parameter file *may* contain the following parameters:

- **Dump_file_name**—Trial Schema dump filename. If not specified, uses the default of **[trial_user].dmp**.
- **Schemas**—Comma delimited list of integration and/or additional schemas to be exported with the trial schema. Additional schemas are specified by their Schema Owner User ID and are exported with the fixed name **[schema-owner-user-id].dmp** to the same dump_file_dir_path that the trial schema is exported to.

 Note:

The Database Administrator user must have the rights necessary to export any schemas listed.

 Note:

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

Example

```
ExportMigrationFiles trial1 /prompt
```

```
ExportMigrationFiles trial1 /accountparams:exportparams.txt
```

```
ExportMigrationFiles trial1 /prompt /logfilepath:c:\trialexport
```

```
ExportMigrationFiles trial1 /accountparams:exportparams.txt  
/logfilepath:c:\trialexport
```

Notes

The following logs are created in the log files path:

- **ExportMigrationFiles.log**—The file contains the output of the actions performed by the ExportMigrationFiles.cmd file.
- **ExportDB.log**—Log generated during the trial schema database export.
- **INF-19122_DetectMnemonicLength.log**—Output from the Mnemonic Length validation script.

Exported files will be located in a subdirectory of the log files path named **ExportFiles**. This folder contains the files that will need to be copied to the target Application Server for the Migration. The Export files created in this folder are:

- **InFormRegistryBackup.txt**—Exported Oracle InForm registry
- **pfadmin_view_service.txt**—Text file containing the information for the servers and studies running on the Oracle InForm Application Server.
- **ImportParametersTemplate.txt**—Example import parameters file with most entries filled in. Requires editing prior to use. There are at a minimum four (4) lines that will need to be edited, all at the top of the file, replacing the bracketed descriptions with the actual settings:

- trial_user_pass=[trial_user_pass]
- pfdbapid=[pfdbapid]
- dump_file_dir_path=[dump_file_dir_path]
- deployment_backup_folder=[deployment_backup_folder]

Other settings in the file may be edited, including the trial name, server name, and so on.

- **InFormPublisher.config**—Oracle InForm Publisher Configuration file. Only included if Oracle InForm Publisher is configured.
- **nepWslc.txt**—Oracle InForm Publisher Configuration Key file. Only included if Oracle InForm Publisher is configured.

The database dump files must be copied from the source database server to the target database server, and placed in the dump_file_dir_path specified in the import parameters. These files must all have permissions set such that they are readable by all users.

**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.

ImportMigrationFiles

Purpose

Imports an Oracle InForm study database dump file that was created by the ExportMigrationFiles command into a new database instance, and creates and configures the Oracle InForm study based on command parameters supplied when the command runs.

**Note:**

The ImportMigrationFiles command registers the study with Oracle InForm Adapter (if the Oracle InForm Adapter parameters are all specified), and with Oracle InForm Publisher (if the Oracle InForm Publisher parameters are provided).

Location

<InstallationDirectory>\InForm\Bin\DBOra

Usage

```
ImportMigrationFiles [connection string] /prompt [/AdditionalParametersFile:[optionsfile]] [/IgnoredImportErrorsFile:[ignorederrors]] [log options] [/resume:resumelabel]
```

```
ImportMigrationFiles [connection string] /accountparams:[paramfile] [/AdditionalParametersFile:[optionsfile]] [/IgnoredImportErrorsFile:[ignorederrors]] [log options] [/resume:resumelabel]
```

Where:

Parameter	Description
connection-string	Database TNS Instance Name
paramfile	Path to text file containing the list of parameters.

Parameter	Description
optionsfile	Optional path to text file containing list of additional import parameters. These options are added to the default import parameters, allowing customization of the import operation.  Note: Contact Oracle Global Support for assistance if the import fails. This parameter is for advanced/internal Support use only. Operations such as remap_tablespace and remap_schema should be added to the file, each on a separate line, with no intervening spaces. For example: remap_tablespace=old databasename:IN FORM remap_schema=olds chemaname:newsch emaname
ignoreerrors	Optional path to text file containing list of errors to be ignored during import. This file is formatted as one error per line. The line must exactly match (through case insensitive comparison) the error for it to be ignored. Only lines containing 'ORA-' and 'IMP-' are examined.  Note: Contact Oracle Global Support for assistance if the import fails. This parameter is for advanced/internal Support use only.

Parameter	Description
resumelabel	Internal label to resume operations at.  Note: Contact Oracle Global Support for assistance if the import fails. This parameter is for advanced/internal Support use only.
log options	Optional parameters for specifying the log file name and/or location. The log file defaults to being named ImportMigrationFiles.log. The log file path defaults to the current working directory. Options: • /LogFile:[<i>filespec</i>] – <i>filespec</i> = fully qualified name and path for created log file. If a relative path is given, it is based from the current working folder. – Overrides the <i>logfile-path</i> to be the resolved path to the given <i>filespec</i>. – Overrides the <i>logfile-name</i> to be the resolved name of the given <i>filespec</i>. – Do not specify this if either of the other logging options are specified. • /LogFilePath:[<i>pathspec</i>] – <i>pathspec</i> = fully qualified path to create the log file in. If a relative path is given, it is based from the current working folder. – Overrides the <i>logfile-path</i> to be the resolved path to the given <i>pathspec</i>. – Does not change <i>logfile-name</i>. • /LogFileName:[<i>filename</i>] – <i>filespec</i> = Filename for the log file. – Overrides the <i>logfile-name</i> for the log file. – Does not change <i>logfile-path</i>.

Command line prompts

If using prompting, you will be prompted for the following parameters:

Parameter	Description
Oracle InForm Study Name	Name of the Oracle InForm study you will create to import the dmp file.
Oracle InForm Server Name	Name of the Oracle InForm server to run the study.
Study Schema Owner User ID	Study database schema owner user id for the migrated study.

Parameter	Description
Study Schema Owner User Password	Study database schema owner's password for the migrated study. Must conform to local password requirements.
Original Study Schema Owner's User ID	Study Schema Owner's User ID from the source environment. If not using a new User ID in the migrated study, this can be left blank.
Oracle InForm Database Administrator User ID	Name for the Oracle InForm Database Administrator. Defaults to pfdbadmin if left blank.
Oracle InForm Database Administrator Password	Password for the Oracle InForm Database Administrator.
Database Dump File Directory Path	Location on the Oracle InForm Database Server where the dump file(s) are located. Must conform to the Database Servers path format (for example, path separators are \ on Windows, / on Linux)
Trial Database Dump Name	File name for the Trial Schema Database Dump that is being imported. Defaults to <trial-schema-owner-id>.dmp if not specified.
Dump File Oracle InForm Version	The full version of Oracle InForm that the study was exported from (for example, 6.2.1.0). Only migrations from Oracle InForm 6.2.0.0 and up are supported.
Trial Type	Study type for the imported study. • LIVE • UAT • TRN • DEV • QA
Trial Approval	• TRUE if you require approval for any deployment package. • FALSE if your study does not require deployment package approval.  Note: By default, Live and UAT studies require study approval.

Parameter	Description
Deployment Backup Folder	Path on the Oracle InForm database server that will be used for database recovery during study deployment. Path must conform to the Database Server OS Path format (for example, path separators are \ on Windows, / on Linux). For example /u01/app/deploybackup.  Note: The physical path must exist before you run the ImportMigrationFiles command.
Deployment Service Port	Port number for Oracle Central Designer to communicate with the Oracle InForm application server to transmit deployment packages. Defaults to 14040 if left blank.
Auth Service Port	Port number for the Oracle InForm application server to authenticate users for the Reporting and Analysis module. Defaults to 14041 if left blank.
ODM Service port	Port number for the Clinical Data API to exchange SOAP requests through HTTP. Defaults to 14042 if left blank.
Oracle InForm Adapter Schema Owner User ID	Oracle InForm Adapter Schema User ID if the study is to be registered with Oracle InForm Adapter. Leave blank if not registering the study.
Oracle InForm Adapter Schema Owner Password	Oracle InForm Adapter Schema User Password if the study is to be registered with Oracle InForm Adapter. Leave blank if not registering the study.
Oracle InForm Adapter Virtual Directory URL	Oracle InForm Adapter Schema Virtual Directory URL if the study is to be registered with Oracle InForm Adapter. Leave blank if not registering the study.
Oracle InForm Publisher Trial Name from Source Environment	Name of the study as configured with Oracle InForm Publisher in the source environment. May be left blank if the study is not being renamed during the migration.
Path to Oracle InForm Publisher Configuration File	Path to the Oracle InForm Publisher configuration file from the source app server if the trial is to be registered with Publisher. Leave blank if trial is not to be registered with Publisher.
Path to Oracle InForm Publisher Key File	Enter the path to the Oracle InForm Publisher configuration Key file from the source application server if the study is to be registered with Oracle InForm Publisher. Leave blank if the study is not to be registered with Oracle InForm Publisher.

Parameter file contents

When using a parameter file, the path to a text file is given. The format of the parameter file is parameter=value, with each value on a separate line, and no spaces between the parameter name, =, and value.

The parameter file *must* contain the following parameters:

Parameter	Description
InForm_trial_name	Oracle InForm study name to create.
InForm_server_name	Name of the Oracle InForm server to create the imported study in.
Trial_user	Trial Schema Owner User ID for the imported study.
Trial_user_pass	Password for the Trial Schema Owner User for the imported study. Must conform to local password requirements.
Pfdbapid	Oracle InForm Database Administrator Password.
Dump_file_dir_path	Location on the Database Server where the import dump file(s) are located.
UpgradeFromInFormVersion	The full version of Oracle InForm that the study was exported from (for example, 6.2.1.0). Only migrations from Oracle InForm 6.2.0.0 and up are supported.
Trial_type	• UAT • LIVE • TRN • DEV • QA
Trial_approval	TRUE or FALSE.
Deployment_backup_folder	Path on the Oracle InForm Database server that will be used for database recovery during study deployment.

The parameter file *may* contain the following additional parameters:

Parameter	Description
From_user	Study Owner User ID in source environment if different from trial_user. Not needed if the Schema Owner User ID is not being changed for the target Application Server.
Pfdbauuid	Oracle InForm Database Administrator User ID. Defaults to pfdbadmin if not specified.
Dump_file_name	Trial Schema dump filename. If not specified, uses the default of [trial_user].dmp .
Deployment_service_port	HTTP port number for Central Designer to communicate with the Oracle InForm application server to transmit deployment packages. Recommended port is 14040. However, any port other than 80 or 443 can be used. Defaults to 14040 if not specified.

Parameter	Description
Auth_service_port	HTTP port number for Oracle InForm to authenticate users for the Reporting and Analysis module. Recommended port is 14041. However, any port other than 80 or 443 can be used. Defaults to 14041 if not specified.
Odm_service_port	HTTP port number for the Clinical Data API to exchange SOAP requests. Recommended port is 14042. However, any port other than 80 or 443 can be used.
Odm_service_port_https	HTTPS Port for the ODM service, no HTTPS access if not specified.
IgnoredImportErrorsFile	Path to file containing list of import errors to be ignored.
AdditionalParametersFile	Path to file containing additional import parameters.
AdditionalSchemas	Comma delimited list of additional schemas to be imported. Names are case sensitive and must match the base name of the schema dump file that was or will be copied to the database server
Adapter_user	Oracle InForm Adapter Schema UID if study is to be registered with Oracle InForm Adapter.
Adapter_user_pass	Oracle InForm Adapter Schema PID if study is to be registered with Oracle InForm Adapter.
Adapter_Url	Oracle InForm Adapter URL if study is to be registered with Oracle InForm Adapter.
Publisher_trial_name	Study name as it appears in the source Publisher Configuration. May be left blank if the study is not being renamed during import.
Publisher_configfile	Path to source Oracle InForm Publisher Configuration file if study is to be registered with Oracle InForm Publisher.
Publisher_keyfile	Path to source Oracle InForm Publisher Configuration Key file if study is to be registered with Oracle InForm Publisher.

Notes

Based on the parameters submitted when the command runs, the ImportMigrationFiles command imports the Oracle InForm study database dump file, and performs study configuration tasks, including:

- Creates the Oracle InForm server and study.
- Upgrades the study schema.
- Updates study statistics.
- Sets the MedML Installer server.
- Upgrades resources.
- Terminate obsolete users.
- Sets the deployment web service port.

- Sets the Authentication service port.
- Sets the ODM service port.
- Configures Oracle InForm Adapter for the study.
- Configures Oracle InForm Publisher for the study.

grant_dba_privs.sql

Purpose

Grants DBA privileges to the rptinstall user, which is used for install and uninstall operations.

Location

Folder where the reporting software is located, for example,
<Installation_Directory>\InForm\bin\DBOra\Reporting.

Usage

@grant_dba_privs.sql rptinstall

Notes

Log on to the study database as SYSDBA.

The name of the DBA user must be **rptinstall**.



Note:

The Oracle InForm database installation and administration scripts are designed to be run using the Oracle InForm Application Server. The scripts can also be run from the Oracle database home on an Oracle InForm Reporting Server. Running them from a different Windows Oracle client or from a non-Windows Oracle client or database home may work, but is not supported.

grant_user_privs.sql

Purpose

Grants database user privileges to the user that owns the study schema.

Location

Folder where the reporting software is located, for example,
<Installation_Directory>\InForm\bin\DBOra\Reporting.

Usage

@grant_user_privs.sql <study schema owner>

<study schema owner>—Database user name that holds the study schema.

Example

```
@grant_user_privs.sql pfst62uid
```

Notes

Run from SQL*Plus with /nolog.

Connect to the study database as a user with the privilege to grant user database privileges.

The script produces a log called grant_user_privs.log.

**Note:**

The Oracle InForm database installation and administration scripts are designed to be run using the Oracle InForm Application Server. The scripts can also be run from the Oracle Database home on an Oracle InForm Reporting Server. Running them from a different Windows Oracle client or from a non-Windows Oracle client or database home may work, but is not supported.

ImportUtility

Purpose

Securely import reporting content you export using Cognos commands to a new instance of the Oracle InForm Reporting server.

Location

The Oracle InForm application server folder on the Oracle InForm application server. For example, <Installation_Directory>\InForm\bin.

Usage

```
ImportUtility [-all | -import | -nopwd | -pfmtr]
```

Option	Parameter
-all	- Creates a secure staging folder on the Reporting server accessible to system administrators. The name of the staging folder is SecureImport_<timestamp>. - Creates the import specification object on the Reporting server accessible to system administrators. - Imports the content from a password-protected deployment package to the SecureImport_<timestamp> folder and makes it accessible only to system administrators. - Copies the imported content to the Public folders on the Reporting server. - Deletes the SecureImport_<timestamp> folder, all its content, and the import specification object.

Option	Parameter
-import	- Creates a secure staging folder on the Reporting server accessible to system administrators. The name of the staging folder is SecureImport_<timestamp>. - Creates the import specification object on the Reporting server accessible to system administrators. - Imports the content from a password-protected deployment package to the SecureImport_<timestamp>. - Deletes the import specification object.
-nopwd	- Creates a secure staging folder on the Reporting server accessible to system administrators. The name of the staging folder is SecureImport_<timestamp>. - Creates the import specification object on the Reporting server accessible to system administrators. - Imports the deployment package content to the SecureImport_<timestamp> folder and makes it accessible only to system administrators. - Copies the imported content to the Public folders on the Reporting server. - Deletes the SecureImport_<timestamp> folder, all its content, and the import specification object.
-pfmtr	- Creates a secure staging folder on the Reporting server accessible to system administrators. The name of the staging folder is SecureImport_<timestamp>. - Creates the import specification object on the Reporting server accessible to system administrators. - Imports the content to the SecureImport_<timestamp> folder. - Deletes the import specification object.

Command line prompts

Depending on the option you specify with the ImportUtility, you are prompted for the following parameters:

- sysadmin_namespace**—Cognos system administrator user namespace.
- sysadmin_uid**—User name for the Cognos system administrator.
- sysadmin_pass**—Cognos system administrator password.
- dispatcher_url**—Internal URI that the Oracle InForm server uses to communicate with the Cognos Analytics server.
This Cognos Analytics parameter is set in the Cognos Analytics Customization for Oracle InForm wizard. The parameter setting is stored in the cogstartup.xml file and corresponds

to the Reporting internal URI value on the Admin > System Configuration page of the Oracle InForm application. For example, `http://example.com:9300/p2pd/servlet/dispatch`.

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

Note:

The `archive_pass` parameter is not required for the `-nopwd` or the `-pfmtr` option.

- **cap_namespace**—`informcap`.
- **trial_uid**—Owner of the study database schema.
- **trialuser_pwd**—Password for the owner of the study database schema.
- **trial_name**—Name of the Oracle InForm study.
- **company_code**—The organization ID. Optional.
This parameter is required only for Oracle-hosted studies in a single sign-on environment.

For legacy purposes, 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.

Notes

- The **-import** and **-pfmtr** command options should be used to stage custom reports before distributing them to multiple studies.
To move the content from the staging folder to the study folders and set study-specific permissions, use the **pfmtrsetuputil** command.
- The **-nopwd** and **-pfmtr** command options are used when you are importing a deployment package that is not password protected.
These options should be used only when there is no clinical data present in the deployment package.

Example

```
ImportUtility -all "E:\scripts\import.txt"
```

informprepora

Purpose

Creates the `pfdbadmin` user if you did not set it up during the Oracle InForm core software installation by selecting the **Prep Oracle** checkbox.

Location

`<Installation_Directory>\InForm\bin` folder.

Usage

```
informprepora <oracle_connection_string>
```

Command line prompts

You are prompted for the following parameters:

- **orasys_user**—Oracle account with SYSDBA privileges.
- **orasys_user_pass**—Password for the Oracle account with SYSDBA privileges.
- **pfdbauid**—Name of the Oracle InForm Admin database user.
- **pfdbapid**—Oracle InForm Admin database user password.

For legacy purposes, 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

```
informprep ora trialdb
```

pfadmin

Purpose

Sets up the Oracle InForm server environment. The parameters are stored in the registry. Therefore, you need local administrator privileges to run the utility.

Location

<Installation_Directory>\InForm\bin folder.

Usage

```
pfadmin [ CHECKREG | CONFIG | CREATEREPORTINGMODEL | HELP | KILLSERVER |  
PING | PUBLISHREVIEWSCHEMA | RECREATEREVIEWSCHEMA | REMOVE |  
RECREATEREPORTINGSCHEMA | RULESCANPROCESS | RULESCANVIEW |  
SETSERVER | SETUP | SETLANGUAGE | START | STOP | UNINSTALL |  
UPDATEWORKFLOW | VIEW ]
```

Option	Purpose and Syntax
CHECKREG [/Del] [/DelAll]	Displays the current Oracle InForm Server COM and MTS components in the NT registry.  WARNING: Be careful to remove the server(s) or uninstall the service before using either of the delete options: • [/Del]—Removes obsolete settings. • [/DelAll]—Removes the settings of all servers.

Option	Purpose and Syntax
CONFIG Service [/AdminDB <i>DBServer</i>] [/AdminDSN <i>DsnName</i>] [/AdminDN] [/EmailSender <i>valid_email_address</i>] [/PfUser] [/SysDBA] [/HelpUrl <i>URL of internal help site index.html page</i>] [/SearchUrl "https://docs.oracle.com/apps/search/search.jsp?category=industries&product=product_id&q="]	Configures an existing service. • [/AdminDB <i>DBServer</i> [SQL]]—Sets the ODBC DSN for the Oracle InFormAdmin database. Make sure that <i>DBServer</i>, <i>UID</i>, and <i>PID</i> are the same ones that were used to create the Oracle InFormAdmin database. Use alphabetic or alphanumeric characters for the <i>UID</i> and <i>PID</i>, and begin them with a letter; do not use all numeric characters. • [/AdminDSN <i>DsnName</i>]—Creates the ODBC DSN Oracle InForm software with the default database server, using the specified user name and password. Use alphabetic or alphanumeric characters for the <i>UID</i> and <i>PID</i>, and begin them with a letter; do not use all numeric characters. • [/EmailSender <i>valid_email_address</i>]—Creates the PFMngrExecutionPlan registry key and populates the EmailSender subkey with an email address to use during autodeployment notifications. • [/PfUser]—Creates the PfUser_<i>computername</i> account during the Oracle InForm installation. The account is for Microsoft MTS packages used by Oracle InForm servers. In general, you do not need to configure the account. If you change the password through NT User Manager, you must reconfigure the Oracle InForm Service with the new password. • [/SysDBA]—Sets the Oracle InForm Service DBA user name and password. You can use this command to change the pfdbadmin password as needed. If you want to change the Oracle InForm Service DBA name, modify the provided SQL script InFormPrepORA.sql with the new user name and password, then run the script as a user with SYSDBA credentials. After running the script, use this command option to configure the Oracle InForm Service to use the new Oracle InForm Service DBA. Use alphabetic or alphanumeric characters for the <i>UID</i> and <i>PID</i>, and begin them with a letter; do not use all numeric characters. • [/HelpUrl <i>URL of internal help site index.html page</i>]—Changes the help link in the Oracle InForm user interface so that it points to a local URL instead of the default location on the Oracle Help Center (OHC). • [/SearchUrl "https://docs.oracle.com/search/?q=search_term&category=industries&product=en%2Findustries%2Fhealth-sciences%2Finform%2Frelease"]—Changes the OHC documentation library where searches are performed from the search field in the upper-right corner Help menu of the InForm user interface.

Option	Purpose and Syntax
	To update the Help location, refer to the <i>User Guide for Administrators</i> .
CONFIG Server <i>ServerName</i> [Automatic Manual]	Configures the startup mode for an existing server as either Automatic or Manual.
CONFIG Trial <i>TrialName</i> [Automatic Manual] [/TriDSN <i>DSN</i> [/RndDSN <i>DSN</i>] [/Rnd [<i>TNS_Service_Name</i>]] [/Host <i>ServerName</i>] [/TrialType [UAT LIVE TRN DEV QA]] [/TrialApproval [TRUE FALSE]] [/TrialMaintenance [ON OFF]] [/DeployBackupFolder <"path_to_a_database_server_folder">]	Configures an existing study. [Automatic Manual]—Configures the study startup mode. [/TriDSN <i>DSN</i>]—Configures the study ODBC DSN. Use alphabetic or alphanumeric characters for the UID and PID, and begin them with a letter; do not use all numeric characters. [/RndDSN <i>DSN</i>]—Configures the study to use the randomization source dataset name. [/Rnd [<i>TNS_Service_Name</i>]]—Creates a study randomization source dataset name. [/Host <i>ServerName</i>]—Moves the study from current host server to another server in the Oracle InForm Service. [/TrialType [UAT LIVE TRN DEV QA]]—Specify the type of study. Live studies are for production environments, UAT studies are for user acceptance testing, Training, Dev, and QA are for internal use. [/TrialApproval [TRUE FALSE]]—Specify whether a deployment package needs approval before it can be deployed to the Oracle InForm application. By default, Live and UAT studies are set to TRUE. Training, Dev, and QA studies are set to false. [/TrialMaintenance [ON OFF]]—Specify that a study is in Maintenance mode and is unavailable to users. This is set during study deployment. [/DeployBackupFolder <"path_to_a_database_server_folder">]—Specify the path to an existing folder on the database server. This folder is the location used to store copies of the study database during deployment package processing.
CONFIG CDD <i>TrialName</i> [Enable Disable] [DSN [Active Inactive]] [DSN <i>StudyLocale</i>]	Configures an existing CDD: [Enable Disable]—Enables or disables the CDD for a particular study. [DSN [Active Inactive]]—Makes a CDD DSN active or inactive for a particular study. [DSN <i>StudyLocale</i>]—Specifies the study locale used for the unit symbol translation that is stored in the CDD column for the unit symbol. <i>path_to_dsn_password_file</i>—Configures an existing CDD DSN with the User ID and password specified. Use alphabetic or alphanumeric characters for the UID and PID, and begin them with a letter; do not use all numeric characters.

Option	Purpose and Syntax
CONFIG WEBSERVICE <i>TrialName</i> [AuthService DeploymentService ODMSubmitService] [Add [HTTP: <i>port</i> HTTPS: <i>port cert:thumbprint</i>] Remove]	Associates a web service with a study and specifies the port number each service should use. [AuthService DeploymentService ODMSubmitService]—The type of service [Add [HTTP:<i>port</i> HTTPS:<i>port cert:thumbprint</i>] Remove]—Creates or removes an association between a study and a web service
CREATEREPORTINGMODEL <i>TrialName</i>	Creates the Reporting model from scratch.
HELP	Lists all the options of the pfadmin command.
KILLSERVER <i>ServerName</i>	Stops server MTS packages without stopping studies on the server.
PING <i>MachineName</i> 1 2 3: <i>ServerName</i> 4: <i>ServerName</i> 5: <i>ServerName</i> [Port#]	Pings the Oracle InForm Service or a particular server. The ping levels are: 1—Ping the Oracle InForm Service. 2—Ping the Oracle InForm Service and all Oracle InForm server(s). 3—Ping the specified server. 4—Ping and get information about the specified server. 5—Ping the specified server and dump the user session to a server-side file. [Port#]—Allows you to specify the port number the echo server is listening on, if you changed it.
PUBLISHREVIEWSCHEMA <i>TrialName</i> [/FORCE]	Applies all study version changes to the review schema clinical tables. If you use the /FORCE option, the Oracle InForm application does not check to see if there are study version changes that are not applied, and makes sure all study version changes are applied.  Note: The /FORCE option does not drop and re-create the clinical tables. It makes the clinical tables match the study version. The /FORCE option should only be used if recommended by Oracle. This operation is synchronous. The study is unavailable during the operation.
RECREATEREVIEWSCHEMA [<i>TrialName</i> <i>StudyLocale_ISO_name</i>]	Recreates the review schema database tables from the Oracle InForm schema. Depending on the size of the study, this can take a long time to run. The Review schema study locale is chosen automatically when a study is first installed, but can be changed using this command.

Option	Purpose and Syntax
REMOVE [Server <i>ServerName</i>] [Trial <i>TrialName</i> [/DSN]] [CDD <i>TrialName</i> [/All <i>DSN</i>]]	Removes an existing server, study, or CDD. • [Server <i>ServerName</i>]—Removes an Oracle InForm server from the Oracle InForm Service. Studies should be either reconfigured to other servers or removed before this command is run. • [Trial <i>TrialName</i> [/DSN]]—Deletes the named study from the Oracle InForm Service. The Web virtual directories and folders for the study are physically removed. Use the /DSN option to remove the study-related DSNs. • [CDD <i>TrialName</i> [/All <i>DSN</i>]]—Removes either all CDD DSNs in the specified study or the given CDD by DSN.  Note: Before using the PFADMIN REMOVE command, verify that IIS is running.
RULESCANPROCESS <i>StudyName</i>	Scans existing rules and execution plans, and outputs a list of rules that violate the allowed rule objects list and marks the rules as valid or invalid.
RULESCANVIEW <i>StudyName</i>	Scans existing rules and execution plans, and outputs a list of rules that violate the allowed rule objects list. This is an informational scan only; it does not mark rules as valid or invalid.

Option	Purpose and Syntax
SETSERVER [Site <i>TrialName MachineName</i>] [MedMLInstaller <i>TrialName MachineName</i>] [Reporting <i>TrialName ReportingUrl</i>] [ReportingAN <i>TrialName AuthenticationNamespace</i>] [ReportingUR <i>TrialName UserRoot</i>] [ReportingInt <i>TrialName ReportingInternalURI</i>] [pfreportinguserpw <i>TrialName</i>] [systempw <i>TrialName</i>] [TrialURL <i>TrialName TrialURL</i>]	Changes the MedML and Site servers and sets the Reporting configuration settings. • [Site <i>TrialName MachineName</i>]—Not supported. • [MedMLInstaller <i>TrialName MachineName</i>]—Not supported. • [Reporting <i>TrialName ReportingUrl</i>]—Set Cognos URL for study. • [ReportingAN <i>TrialName AuthenticationNamespace</i>]—Set Cognos AuthenticationNamespace for study. • [ReportingUR <i>TrialName UserRoot</i>]—Set Cognos UserRoot for study. • [ReportingInt <i>TrialName ReportingInternalURI</i>]—Set the internal URI that the Oracle InForm server uses to communicate with the Cognos server. • [pfreportinguserpw <i>TrialName</i>]—Run this pfadmin command after the password for the pfreportinguser is changed in the Oracle InForm user interface to set a property used by Reporting when it needs the credentials of the pfreportinguser user for building the model. pfreportinguser is the preferred studyuser to run pfrinit to configure Cognos for each study. • [systempw <i>TrialName</i>]—Set the password for the system user for the specified study. The command also activates the system user. • TrialURL <i>TrialName TrialURL</i>—Set the vanity URL for the specified study. Enter the URL that you use to access the study, including the tenant name.  Note: The SETSERVER command requires that you set the Default Authentication Level property of the Oracle InForm server to Connect: To set this property: 1. Select Administrative Tools > Component Services > My Computer - Properties. 2. Set the Default Properties -

Option	Purpose and Syntax
	 Default distributed communication properties - Default Authentication Level value to Connect.
SETUP Server <i>ServerName</i> [Automatic]	Creates a new Oracle InForm server in the InForm Service. [Automatic]—The server is automatically started with the Oracle InForm Service. Manual startup is the default.
SETUP Trial <i>TrialName</i> <i>ServerName</i> [/DB <i>OracleConnStr</i>] [/DSN <i>TriDSN</i> [Automatic]	Creates a study on the given Oracle InForm server with the option to either create a new ODBC DSN or use an existing one. The server has to be created. The study startup mode is Manual by default. Use the Automatic option to automatically start the study when the Oracle InForm server that hosts the study is started. [/DB <i>OracleConnStr</i> <i>UID</i> <i>PID</i>]—Creates an ODBC DSN <i>TrialName</i> with the given <i>ServerName</i>, <i>UID</i>, and <i>PID</i>. Use alphabetic or alphanumeric characters for the <i>UID</i> and <i>PID</i>, and begin them with a letter; do not use all numeric characters. [/DSN <i>TriDSN</i> <i>UID</i> <i>PID</i> [Automatic]]—Configures the created study <i>TrialName</i> to use the given study dataset name <i>TriDSN</i>, <i>UID</i>, and <i>PID</i>. The study must be present in the ODBC DSN. Use alphabetic or alphanumeric characters for the <i>UID</i> and <i>PID</i>, and begin them with a letter; do not use all numeric characters.  Note: Before using the /DSN command, verify that IIS is running.

Option	Purpose and Syntax
SETUP CDD <i>RefName TrialName</i> /DB <i>OracleConnStr DSN</i> [/TBSP <i>OraTBSP</i>] [Active] [NoSchema]	Sets up a new CDD DSN associated with the given CDD refname. Use alphabetic or alphanumeric characters for the UID and PID, and begin them with a letter; do not use all numeric characters. • [/TBSP <i>OraTBSP</i>]—Defines the Oracle tablespace for the CDD schema. • [Active]—Specifies that the DSN is transactional. • [NoSchema]—Indicates that no new CDD schema should be created during setup. The existing database is not touched. By default, the user is dropped and the Oracle database destroyed. Then, a new schema is created and populated based on the RefName that defines the schema.  Note: To execute this command successfully, the study must be started.
SETUP CDD <i>RefName TrialName</i> /DSN <i>DSN</i> [/TBSP <i>OraTBSP</i>] [Active] [NoSchema]	Sets up an existing DSN associated with the given CDD RefName. Use alphabetic or alphanumeric characters for the UID and PID, and begin them with a letter; do not use all numeric characters. [/TBSP <i>OraTBSP</i>]—Defines the Oracle tablespace for the CDD schema. • [Active]—Makes the DSN transactional. • [NoSchema]—Indicates that no new CDD schema should be created during setup. The existing database is not touched. By default, the user is dropped and the Oracle database destroyed. Then, a new schema is created and populated based on the RefName that defines the schema.  Note: To execute this command successfully, the study must be started.
SETLANGUAGE [<i>IsoLanguageName</i>] en-US ja-JP	Sets the Oracle InForm product locale language. en-US and ja-JP are currently supported.

Option	Purpose and Syntax
START [Server <i>ServerName</i>] [Trial <i>TrialName</i>]	Starts an existing Oracle InForm server or study. • [Server <i>ServerName</i>]—Starts an existing Oracle InForm server by server name. • [Trial <i>TrialName</i>]—Starts an existing study by study name.
START [Trial <i>TrialName</i> [/Design]]	Starts the study in design mode. This means you can install study components that are not completely designed (strict checking is not in force). By default, the study starts in production mode.
STOP [Server <i>ServerName</i> [/Trials]] [Trial <i>TrialName</i> [/Anyway]]	Stops an existing Oracle InForm server or study. • [Server <i>ServerName</i> [/Trials]]—Stops an existing Oracle InForm server by server name. By default, a running server can be stopped if there is no study running and no other application connected to it. The Trials keyword stops all running studies, and then stops the server. • [Trial <i>TrialName</i> [/Anyway]]—Stops the named study. The Anyway keyword stops a study regardless of any connections or HTTP requests.
UNINSTALL	Removes all Oracle InForm servers and studies, and then removes the Oracle InForm service settings PfUser_computername and the MTS library package.  Note: The Oracle InForm service must be running for the command to work.

Option	Purpose and Syntax
UPDATEWORKFLOW [StudyName ["siteMnemonic"] [- UpgradeStudyVersion]] [SetWFThreadsNumber StudyName NumberOfThreads] [GetWFThreadsNumber StudyName]	Configures and performs the update workflow process. • [StudyName [siteMnemonic] [- UpgradeStudyVersion]]—Triggers the update workflow process. If a <i>siteMnemonic</i> is specified, the process is executed only at that site, otherwise it is executed at all sites. The <i>siteMnemonic</i> must be enclosed in double quotes if it contains a space. If the flag -UpgradeStudyVersion is used, the site is updated to the latest study version before update workflow runs. • [GetWFThreadsNumber StudyName]—Returns the current setting for the number of threads used for update workflow for the study. The default is 2. • [SetWFThreadsNumber StudyName NumberOfThreads] —Sets the number of threads processing the workflow update for the study. The value can be set between 1 and 32.  Caution: You should not adjust this setting without input from Oracle Global Support. If the performance of your study deployment or study migration is too slow (for example, timeouts happen), contact Oracle Global Support for assistance.

Option	Purpose and Syntax
VIEW [Languages] [Service] [Server <i>ServerName</i>] [Trial <i>TrialName</i>] [CDD <i>TrialName</i>] [Reporting <i>TrialName</i>]	Displays a monitoring list of all servers in the Oracle InForm service, all studies in servers, or all RefNames for CDD DSNs configured for a study. • [Languages]—Lists installed languages without starting the Oracle InForm Service. • [Service] – Lists all the servers and studies in the Oracle InForm service. – Lists installed product languages as well as the actual installed product language. • [Server <i>ServerName</i>]—Lists each server by server name and studies hosted on that server. • [Trial <i>TrialName</i>]—Lists a study by its name. • [CDD <i>TrialName</i>]—Lists the RefNames for each CDD DSN configured for the specified study. • [Reporting <i>TrialName</i>]—Lists the current status of Reporting. – States whether the study is configured for Reporting. – Specifies the type of reporting setup, for example samedb. – Specifies the reporting username. – Gives the date of the last Cognos model update. – Reports if the Reporting database is up-to-date. – States whether Oracle streams are working properly (if applicable).

Command line prompts

Depending on the options you specify, you are prompted for the following parameters:

For **pfadmin setup** or **pfadmin config** commands:

- **uid**—Oracle InForm study database user.
- **pid**—Oracle InForm study database user password.

For **pfadmin setserver** commands:

- **pid**—Oracle InForm study database user password.

Examples

Check the status of Oracle InForm Reporting:

```
pfadmin view reporting pfst63
```

Check the status of Oracle InForm servers and studies on an InForm Service:

```
pfadmin view service
```

Start the demo Oracle InForm server:

```
pfadmin start server demo
```

Start the sample study:

```
pfadmin start study sample
```

Stop all studies running on the demo Oracle InForm server, and then stop the demo server:

```
pfadmin stop server demo /Trials
```

Set the password and activate the system user account:

```
pfadmin setserver systempw pfst63
```

Notes

Any arguments containing commas, equal signs, or spaces must be enclosed within double quotes.

pfcognosconfig

Purpose

Configures an Oracle InForm study to work with Cognos Analytics. The PFCognosConfig utility is a command-line alternative to the **Oracle InForm Reporting Configuration Wizard**.

PFCognosConfig can be run multiple times to change reporting parameters. If the reporting study user password changes, PFCognosConfig.exe must be run to tell Oracle InForm about the new password.

When PFCognosConfig is run multiple times for a study, each run after the first does not need to specify all of the parameters; only the changed parameters need to be specified.

Location

<Installation_Directory>\InForm\bin folder.

Usage

```
pfcognosconfig ["path_to_password_file"]
```

Option	Parameter
path_to_password_file	When specified, includes the path to a text file that contains the user name and passwords required to run the command. If the parameter file is not specified, the command prompts for the required user names and passwords. 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.

Command line prompts

You are prompted for the following parameters:

- **trialname**—Name of the Oracle InForm study.
- **log_file**—Name of output log.
- **namespace**—informcap
- **gateway_uri**—External public URI that communicates with the Cognos Analytics Gateway Services from an end user's browser.
- **dispatcher_uri**—Internal URI that the Oracle InForm server uses to communicate with the Cognos Analytics server.
- **root_folder**—The top-level reporting folder for the company.
- **reporting_samedb**—True if the study and the Reporting database are on the same server.
- **trial_web_service**—Oracle InForm authentication web service URL.
- **register_db_server**—Study database user registered with Cognos.
- **register_db_user**—Password for the database user registered with Cognos.
- **remove**—When set to **true**, reporting is turned off for the specified study and clears all reporting settings for the study.

Parameter file contents

The following parameters are required for the pfcognosconfig command password file:

Option	Description
trialname=<studyname>	Name of the Oracle InForm study.  Note: Use the same case as when the study was created by the Central Designer deployment package.
log_file=<outputlog>	Name of output log. Example: nocreatorgcap.log. (Optional).
namespace=<cap_namespace>	Custom Authentication Provider (CAP) namespace. Enter informcap.
gateway_uri=<gateway_uri>	External public URI that communicates with the Cognos Analytics Gateway Services from an end user's browser. This Cognos parameter is set in the Cognos Analytics Gateway Customization for Oracle InForm wizard. The parameter setting is stored in the cogstartup.xml file. Example: http://www.example.com:80(443)/cognos/bi

Option	Description
dispatcher_uri=<dispatcher_uri>	Internal URI that the Oracle InForm server uses to communicate with the Cognos Analytics server. This Cognos parameter is set in the Cognos Analytics Customization for Oracle InForm wizard. The parameter setting is stored in the cogstartup.xml file and corresponds to the Reporting internal URI value on the Admin > System Configuration page of the Oracle InForm application. Used when running command line utilities that perform SDK operations, such as pfrinit and DecomTrial. Example: http://www.example.com:9300/p2pd/servlet/dispatch
root_folder=/ <i><content></i> / <folder>[@name='<studyname>']	The top-level reporting folder for the company. Default: /content/folder[@name='<studyname>']
reporting_samedb=<true false>	True if the study and the Reporting database are on the same server.
trial_web_service=<URL>	Oracle InForm authentication web service URL. This is a required parameter.
register_db_server=<ServerName>	Name of the server in which the study is registered with Cognos.
register_db_user=<UserName>	Study database user registered with Cognos.
register_db_pass<UserPassword>	Password for the database user registered with Cognos.
remove=<true>	When specified, turns off reporting for the study and removes all reporting-related settings for the study. When you use the remove parameter, you must also specify the following: • study_name • register_db_server • register_db_user • register_db_pass

Example

Example command-line with a complete set of parameters to set up reporting:

```
pfcognosconfig "E:\scripts\pfconfigparams.txt"
```

pfrinit

Purpose

Performs the following tasks:

- Modifies the default Cognos Analytics capabilities to fit the Oracle InForm reporting environment.
- Creates new Cognos Analytics groups that match Oracle InForm reporting requirements.
- Sets Public folders permissions so that only Publishers can write to this public area.

- Maps study-specific reporting groups to the Cognos Analytics groups and roles.
- Creates study-specific data connection and set permissions so that it is restricted for the use of study members only.
- Copies the Oracle InForm Trial Management package present in the Oracle InForm folder and renames it as a study-specific package.
- Creates a study folder that contains all the standard folders and reports that point to the study-specific package. Relative paths within reports will be modified to reflect the new location.
- Validates all copied reports so that all successfully validated reports are syntactically correct and able to run against the study-specific packages.

Location

The Oracle InForm Application Server folder of the server where the Cognos Application Tier components are installed. For example, `<Installation_Directory>\InForm\bin`.

Usage

pfrinit [setupinform]

Option	Parameter
setupinform	When specified, configures the reporting environment without a study. When migrating the reporting environment to a new machine, run the command with this parameter before you import export packages.

Command line prompts

You are prompted for the following parameters:

- **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 crnsysadmin user.
- **publisher_namespace**—Custom Authentication Provider (CAP) namespace. Enter informcap.
- **publisher_uid**—Oracle InForm study user who is a member of the following Reporting groups:
 - Publishers.
 - Either Sponsor Users or Site Users.
- **publisher_pass**—Password of the Oracle InForm study user.
- **dispatcher_url**—Internal URI that the Oracle InForm server uses to communicate with the Cognos Analytics server.
- **trial_name**—Name of the Oracle InForm study.
- **reportdb_pass**—Study PID.
- **in_place_upgrade**—Y/N. Indicate if the PFRInit command is being run as part of an in-place upgrade (required for an in-place upgrade). For more information, see the *Upgrade and Migration Guide*.

For legacy purposes, 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.

Note

The recommended Oracle InForm study user for running pfrinit is **pfreportinguser**. You can change the password for this user using the Oracle InForm user interface as with any other user. After you change the password, however, you must run the PFADMIN command, using this syntax:

PFADMIN SETSERVER PFREPORTINGUSERPW <studyname>

When prompted, enter the pfreportinguser password.

This command sets a property used by Reporting when it needs the credentials of the **pfreportinguser**.

For more information, see [pfadmin](#).

Example

```
pfrinit "E:\scripts\init.txt"
```

PostDeployWorkaround.cmd

Purpose

Applies a workaround after a study deployment. If the operation is successful, the command returns 0. Otherwise, it returns 1 to signal the error.

Location

Deployment root folder, as defined in the DeployRoot registry value under HKEY_LOCAL_MACHINE\SOFTWARE\OracleHS\InForm. By default, it is the InFormDeploy folder on the drive where the Oracle InForm application is installed. For example: E:\InFormDeploy.

Usage

PostDeployWorkaround <Study_Name> <TNS_Service_Name> <Deployment_ID>

Option	Parameter
Study_Name	Name of the study requesting deployment.
TNS_Service_Name	Local Net Service Name for the remote database service.
Deployment_ID	Unique identifier for the deployment request.



Note:

Workarounds should be used as a last resort during automated deployments, in order to keep human intervention to a minimum.

PreDeployWorkaround.cmd

Purpose

Applies a workaround before a study deployment. If the operation is successful, the command returns 0. Otherwise, it returns 1 to signal the error.

Location

Deployment root folder, as defined in the DeployRoot registry value under HKEY_LOCAL_MACHINE\SOFTWARE\OracleHS\InForm. By default, it is the InFormDeploy folder on the drive where the Oracle InForm application is installed. For example: E:\InFormDeploy.

Usage

PreDeployWorkaround <Study_Name> <TNS_Service_Name> <Deployment_ID>

Option	Parameter
Study_Name	Name of the study requesting deployment.
TNS_Service_Name	Local Net Service Name for the remote database service.
Deployment_ID	Unique identifier for the deployment request.



Note:

Workarounds should be used as a last resort during automated deployments, in order to keep human intervention to a minimum.

RequestTime.cmd

Purpose

Indicates if a future study deployment time conflicts with any conditions on the production environment. If the system is not available or if resource intensive tasks are scheduled on the production environment during the requested timeframe, the requested time is rejected (the command returns 1). Otherwise, it is accepted (the command returns 0).

Location

Deployment root folder, as defined in the DeployRoot registry value under HKEY_LOCAL_MACHINE\SOFTWARE\OracleHS\InForm. By default, it is the InFormDeploy folder on the drive where the Oracle InForm application is installed. For example: E:\InFormDeploy.

Usage

RequestTime <Study_Name> <Requested_Time> <Study_Type>

Option	Parameter
Study_Name	Name of the study to be deployed.
Requested_Time	Local time on the InForm server when the deployment is requested, in the format MM/DD/YYYY HH:MM. For example: 05/18/2017 15:30.
Study_Type	Type of the study to be deployed. Options are: • LIVE • UAT • TRAINING • QA • DEV

**Note:**

The RequestTime command helps planning deployments that do not conflict with scheduled maintenance windows or expected peak system usage periods. However, it cannot prevent conflicts caused by conditions that were unexpected or unscheduled at the time the request was made, such as emergency maintenance operations.

8

Troubleshooting

In the appendix:

- [Install issues](#)

Install issues

In this section:

- [Oracle MTS configuration is invalid](#)
- [XA Views: INVALID](#)
- [Database connectivity](#)
- [Password error on Oracle InForm service start up](#)
- [ORA-01792 error during reporting setup](#)

Oracle MTS configuration is invalid

If the Oracle registry settings are not correct, you may get the following InForm core installer errors during the installation process:

- Oracle MTS configuration is invalid.
- Registry Settings: INVALID.
- XA Views: INVALID.

Possible solutions:

- If the installation wizard is still open:
 1. Click **Back** to display the **Database Configuration** window.
 2. Select the **Prep Oracle** checkbox.
 3. Click **Next** to proceed.

This runs the informprepora and mtsora102 commands.

- If the installation window has been closed, run the following commands, located in the InstallSupport folder of the InForm installation image:
 - [mtsora102.exe](#)
 - [oramtsadmin.sql](#)

XA Views: INVALID

If you have tried the solution that is recommended in *Oracle MTS configuration is invalid* and still get this error, or if you run mtsora102 from the command line and get a warning, the xaview.sql file may not be installed.

**Note:**

This can happen for some Oracle client-only installations (multi-tier setup).

Possible solution:

1. Copy the xaview.sql file from another machine (running the same Oracle version) to your Oracle rdbms\admin directory.
2. Log in as a user with SYSDBA credentials on a machine with xaview.sql.
3. Run xaview.sql against your Oracle InForm core instance.
4. Run mtsora102 from the command line.

Database connectivity

If you get a warning about database connectivity, make sure that:

- The connect string value is correct.
- The pfdbadmin password is valid.

If you get a message that the pfdbadmin user does not exist, create the user by doing one of the following:

- Select the **Prep Oracle** checkbox in the Oracle InForm installation wizard.
- Run the **informprepora** command located in the InstallSupport folder of the Oracle InForm installation image.

Password error on Oracle InForm service start up

The Oracle InForm installation wizard cannot ensure that the password entered on the Account Configuration Window for the Local Machine User (pfUSR) meets the password requirements set for the machine. If you enter a password that does not conform to the Windows password requirements, an error will prevent the Oracle InForm service from starting.

1. To change the pfUser password enter the following command at a DOS prompt:

```
pfadmin install
```

2. When prompted for the pfUSR password, enter a password that meets the password requirements.
3. Run the following command to start the Oracle InForm service:

```
new start pfservice
```

Use the pfadmin view service command to verify that the Oracle InForm service has started.

ORA-01792 error during reporting setup

Possible cause

Your study design includes a large form that requires more than 1000 columns to be created in a table or view in the database.

Possible solution

Modify your study design to use forms with 20 or fewer items on each form. Limiting the size of your forms can also prevent downstream issues in Oracle InForm, RDEs, and other integrated applications.