# Oracle® Life Sciences InForm

## Upgrade and Migration Guide

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Oracle Life Sciences InForm Upgrade and Migration Guide, Release 7.0.1.2

G50602-01

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# Upgrading and migrating to this Oracle InForm release

In this chapter:



## Overview of upgrading to this release

You can perform a new installation of this Oracle InForm software release, or you can upgrade to it from a previous version of the Oracle InForm 7.x software.

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

To upgrade to this release, perform the following steps, as needed:

- **Upgrade the database environment**– Use to upgrade to the Oracle 19c database software.
  For more information, see Upgrading the database environment.
- **Upgrade the Oracle InForm studies:**
  - **On-premises environment upgrade** – You can upgrade to this release from Oracle InForm 7.0.0.1, 7.0.1, and 7.0.1.1.
    For more information, see Migrating InForm studies to a new machine.
  - **Hosted environment upgrade** – You can only upgrade to this release from Oracle InForm 7.0.0.1, 7.0.1, and 7.0.1.1.
- **Migrate the reporting environment (Optional)** – You can migrate your reporting environment to the Oracle InForm 7.0.1.2 release from any Oracle InForm studies. This step is required only if you are using the Reporting and Analysis module.
  For more information, see Migrating the reports to a new machine.

## Requirements for the Oracle InForm studies you can upgrade

You can upgrade to this release from the following Oracle InForm releases:

- 7.0.0.1
- 7.0.1
- 7.0.1.1

For information on Oracle Central Designer study deployment, see Create the Central Designer study deployment and the *Oracle Central Designer User Guide*. Besides updating the Oracle Central Designer project, you can only upgrade studies from Oracle InForm 7.0.0.1, 7.0.1, or 7.0.1.1.

# Hardware and software requirements for Oracle InForm

Before upgrading to this release, review the Oracle InForm *System Requirements* section from the Oracle Help Center.

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# Upgrading the database environment

In this chapter:



## Overview of upgrading the database environment

When you are upgrading to this Oracle InForm release from an environment that uses the Oracle 12c database software, you must upgrade to the Oracle 19c database software.

Check out the following resources if you need more information on:

- which versions of the Oracle database software are supported, see the *System Requirements*.
- installing the Oracle database software, see your *Oracle database documentation*.
- the database parameter settings, and guidance on installing and configuring the Oracle database software for the Oracle InForm environment, see the *Installation Guide*.

> **Note**
>
> Oracle does not support an in-place upgrade from the Oracle 12c database to the Oracle 19c database software.

## Upgrade to a new Oracle database environment

Follow these steps when upgrading to a new Oracle database environment:

1. Create a new Oracle 19.19.0.0 database environment.
2. Create new study databases in the new Oracle 19.19.0.0 environment.

For more information, see your *Oracle database documentation*.

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# Upgrading and migrating the Oracle InForm studies

In this chapter:



## Preparing to upgrade or migrate the Oracle InForm software and studies

To prepare to migrate the Oracle InForm studies:

1. Review the following topics:
   - Database and file customizations
   - Oracle Database import recommendations
   - Itemset types and migrated studies
   - Imported child controls and migrated studies
   - Changed resource files
2. Create backup files.
3. Export the Oracle InForm study database.

> **Note**
>
> For more information on the utilities needed for this section, refer to the Command and script reference appendix.



### Considerations before you migrate

**In This section:**

## Database and file customizations

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

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

Any schema customization must have an upgrade path that results in a valid Oracle InForm schema for this release at the point in the migration where you create the review schema. For more information, see Import the Oracle InForm study DMP file(s).

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

- Views
- Functions
- Procedures
- Packages
- Triggers

> **Note**
>
> The command `pfadmin RECREATEREVIEWSCHEMA` runs automatically as part of the study import process. If any schema objects such as views, functions, procedures, packages, or triggers are invalid, `pfadmin RECREATEREVIEWSCHEMA` fails, and as a result the migration fails. You must repair any invalid schema objects before you can perform a migration.

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

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

# Changed resource files

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

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

- Files updated in this Oracle InForm release
- New files in this Oracle InForm release

- Files removed in this Oracle InForm release

## Files updated in this Oracle InForm release

**...\Resources\enu**

**...\Resources\jpn**

AlertsFrame.html

CRBViewFrame.html

CRFFrame.html

ContextMenuFrame.html

ControlPanelNoFrame.html

DetailFrame.html

EQACFrame.html

EQACQueryFrame.html

MonitorFrame.html

MultiPage.html

QueryListFrame.html

Reauth.html

ReauthenticationWindow.html

SDVTitleNoFrame.html

ScreeningListFrame.html

SignCRFTitleRepeatingSummary.html

SignPage.html

SigningListFrame.html

TEViewFrame.html

TopFrameset.html

ViewTable.html

ViewTableBody.html

ViewTableRuleConfirmation.html

GenericFatalErrorMsg.html

MainLine_VS_2022

MainLine_VS_2022

AlertsFrame.html

CRBViewFrame.html

CRFFrame.html

ContextMenuFrame.html

ControlPanelNoFrame.html

DetailFrame.html

EQACFrame.html

EQACQueryFrame.html

MonitorFrame.html

MultiPage.html

QueryListFrame.html

Reauth.html

ReauthenticationWindow.html

SDVTitleNoFrame.html

ScreeningListFrame.html

SignCRFTitleRepeatingSummary.html

SignPage.html

SigningListFrame.html

TEViewFrame.html

TopFrameset.html

ViewTable.html

ViewTableRuleConfirmation.html

**...\XMLBase\Help**

Version.htm

## New files in this Oracle InForm release

**...\Resources\enu**

**...\Resources\jpn**

None.

**...\XMLBase**

None.

**...\XMLBase\Help**

## Files removed in this Oracle InForm release

**...\Resources\enu**

**...\Resources\jpn**

None.

**...\XMLBase**

None.

**...\XMLBase\Help**

## Create backup files

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

   ```
   pfadmin stop server <servername> /Trials
   ```

2. Back up the Oracle InForm trial folder, with all of its contents, located at `<InstallationDirectory>\InForm\Trials\<studyname>`.

   For more information, see Database and file customizations.

3. If the CIS software is installed on the Oracle InForm application server, you must uninstall it. Use the **Control Panel > Add/Remove Programs** option to remove the CIS software.

## Export the Oracle InForm study database

To export the Oracle InForm study database:

1. Copy the `<Local Drive:>\OracleHS\InstallSupport` folder from the downloaded product image to the Oracle InForm application server.
2. Run `ExportMigrationFiles.cmd` (located in the `<Local Drive:>\OracleHS\InstallSupport` folder on the Oracle InForm application server) to back up each Oracle InForm study database as a DMP file, using the following syntax:

   ```
   ExportMigrationFiles.cmd <TNS_Service_Name> [/
   accountparams:accountparams.txt] [/prompt]
       [/logfilepath:<logfilepath>]
   ```

   where:

   - **TNS_Service_Name**—TNS name for the database instance.
   - **logfilepath**—Optional path where you can specify the log files to go.

   You are prompted for the following values:

   - – **pfdbadmin user**—Name of the Oracle InForm database administrator.
     – **pfdbadmin password**—Password for the InForm database administrator.
     – **Trial user ID**—Owner of the study database schema.
     – **Trial user password**—Password for the owner of the study database schema.
     – **Dump file directory path**—Directory path on the Oracle InForm Database server where the export dump files are created.

   > **Note**
   >
   > When you specify the directory path, be sure to use the directory path delimiters ( / or \ ) that are appropriate for the database server operating system.

> **Note**
>
> If a parameter file is used, there are some additional options that can be specified in the file.

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

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

**Parameter file contents**
You can pass the following parameters in a parameter file:

- **pfdbadmin_user**—Name of the Oracle InForm database administrator.
- **pfdbadmin_user_pass**—Password for the Oracle InForm database administrator.
- **trial_user**—Owner of the study database schema.
- **trial_user_pass**—Password for the owner of the study database schema.
- **dump_file_dir_path**—Location of the directory where you created the dump file.
- **schemas**—The list of all integration schemas for the trial that needs to be exported. This is an optional parameter.

> **Note**
>
> The value to this parameter should be passed as a comma separated value.

> **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.

> **Note**
>
> Customer-defined databases or randomization databases that are not part of the study database must be exported using standard database commands. For more information, see the Oracle Database documentation.

# Upgrading Oracle InForm studies

You can upgrade any Oracle InForm 7.0.0.1. 7.0.1, or 7.0.1.1 study. Versions prior to Oracle InForm 7.0.0.1 must be upgraded to Oracle InForm 7.0.0.1 before being migrated to 7.0.1.2. You can perform an in-place upgrade from Oracle InForm 7.0.0.1. For more information, see Running an in-place upgrade. In-place upgrades are not supported for Oracle InForm releases prior to 7.0.0.1.

For more information, see Requirements for the Oracle InForm studies you can upgrade.

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

> **Note**
>
> For more information on the utilities needed for this section, refer to the Command and script reference appendix.

- Install and configure this Oracle InForm software release
- Copy the backup files to the Oracle InForm application server for this release
- Make updates to the Windows registry settings
- Create tablespaces other than INFORM
- Import the Oracle InForm study DMP file(s)
- Set up a randomization source for a study
- Install the Oracle Central Designer certificate
- Perform the final study configuration
- Install the study folder backup
- Start the Oracle InForm studies
- Set the password for the system user
- Create the Oracle Central Designer study deployment
- Update subject workflows
- Update the Execution Plan Server and Server Friendly Name
- Clear the client browser cache

## Install and configure this Oracle InForm software release

> **Note**
>
> Before you install this Oracle InForm software release, make sure your environment meets the requirements for this release. For more information, see the *System Requirements*.

Install and configure the Oracle InForm software, using the Installation Wizard.

On the Database Configuration page:

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

For more information, see the *Installation Guide*.

# Copy the backup files to the Oracle InForm application server for this release

If you are migrating to a new database server, copy the `ExportFiles` folder created during `ExportMigrationFiles` to the new database server.

1. Copy any customizations to the Oracle InForm application server so they can be introduced after migration.

   For more information, see Create backup files.

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

   For more information, see Database and file customizations.

3. Copy the `InFormRegistryBackup.txtfile` created by the `ExportMigrationFiles` command to the Oracle InForm application server for this release so you can update the registry on the server as needed.

   For more information, see Make updates to the Windows registry settings.

# Make updates to the Windows registry settings

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

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

For more information, see About registry key migration.

To evaluate what changes you should make:

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

# Create tablespaces other than INFORM

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

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

# Import the Oracle InForm study DMP file(s)

To import the Oracle InForm study DMP file(s):

1. Edit the `ImportParametersTemplate.txt` file in the `ExportFiles` folder and update the following parameters at the top:
   - **trial_user_pass** —The new trial schema password

- **pfdbapid** —The PFDbAdmin password
- **dump_file_dir_path** —The location on new database server where the dump files are copied to
- **deployment_backup_folder** —The folder on database server where backups are created during deployment

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

   ```
   ImportMigrationFiles.cmd <TNS_Service_Name>/accountparams:<path to edited
   ImportParametersTemplate.txt>
   ```

The `ImportMigrationFiles` command imports the DMP file(s), upgrades study resources, recreates the review schema, and configures the Oracle InForm study.

Any custom events in the study are exported to a CSML file and must be imported in Oracle Central Designer before the deployment package for the migrated study is installed. For more information, see Import the custom events created in previous releases into the study in Oracle Central Designer.

> **Note**
>
> Previously exported customer-defined databases or randomization databases that are not part of the study database must be imported using standard database commands. For more information, see the *Oracle Database* documentation.

# Set up a randomization source for a study

Do one of the following:

- Activate a randomization source
- Migrate an existing Microsoft Access randomization source to an Oracle database

## Activate a randomization source

To set up a randomization source:

1. Migrate the randomization source database to the Oracle InForm application server.
2. Create the randomization schema and import the randomization source database.
3. Run the following command:

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

   The command creates the `<StudyName>RND` randomization ODBC data source for the database `<TNS_Service_Name>`.
4. Activate the randomization rule in the Oracle InForm application.
5. Restart the study.

# 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, see Migrating the randomization source to the study database.
- Store the randomization tables in a new randomization source database.
  For more information, see 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.

(Optional) Enter the result of the procedure here.

## Install the Oracle Central Designer certificate

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

1. Copy the public key of the certificate you retrieve from the Oracle Central Designer application to a folder on the Oracle InForm application server.
2. Install the certificate using the Microsoft Management Console.

For more information, see the *Installation Guide*.

## Perform the final study configuration

1. Finish configuration of the studies related to customer-defined database and randomization.
2. Reapply any customizations.

For more information, see the *Study and Reporting Setup* guide.

## Install the study folder backup

1. Copy the study folder backup (from InForm\Trials\<studyname>) to the InForm\Trials folder on the new appserver.
2. In a command prompt, run:

```
xcopy /e/i/y "<trialsfolderbackuplocation\<studyname>"
"\OracleHS\InForm\Trials\<studyname>
```

## Start the Oracle InForm studies

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

```
pfadmin start trial <trialname>
```

## Set the password for the system user

- Set the password for the system user, using the following command and syntax:

```
pfadmin setserver systempw <trialname>
```

## Create the Oracle Central Designer study deployment

If you are migrating to this Oracle InForm release, the Oracle Central Designer project for each study must be updated to Oracle Central Designer 7.0.

For on-premises installation, a new deployment must be sent to the Oracle InForm application to update each study. The purpose of this new study deployment is to upgrade the Oracle InForm study to use the latest rule engine. This new deployment package must reflect, at a minimum, an insignificant change (for example, move just one object in the workflow diagram in Oracle Central Designer) to trigger a new study version.

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

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

## Update subject workflows

Update the subject workflow following updates and package deployment.

- In a command prompt, run:

  pfadmin updateworkflow <studyname>

## Update the Execution Plan Server and Server Friendly Name

1. Log into the trial as the system user.
2. Navigate to the `Admin/Configuration` page.
3. Set the **Execution Plan Server** and **Server Friendly Name** configuration items to the hostname for this appserver. For example, if the full hostname is `appserver1.mydomain.com`, the Execution Plan server name would be `appserver1`.

## Clear the client browser cache

After you complete the study migration steps, clear the Client browser cache.

# Running an in-place upgrade

You can run an in-place upgrade from an Oracle InForm 7.0 release. For all other releases, you must first migrate to a 7.0 release.

> **Note**
>
> Prior to running an in-place upgrade, you must stop all studies, services, and other integrations, such as Oracle InForm Adapter and Oracle InForm Publisher.

If the in-place upgrade fails for any reason, use the backup files you created in the Back up the Oracle InForm study and admin databases and files for the in-place upgrade chapter to restore your Oracle InForm 7.0 environment. For more information, see Restore the previous Oracle InForm release.

- Upgrade the Oracle Central Designer rules engine
- Back up the Oracle InForm study and admin databases and files for the in-place upgrade
- Update the Oracle InForm application server software
- Upgrade the database parameters
- Deploy the SQL profiles
- Run the in-place upgrade
- Enable network access rights for automated study deployments on the Oracle InForm application server
- Create new database objects for the review schema (Optional)
- Start the Oracle InForm study and server
- Update subject workflows

# Upgrade the Oracle Central Designer rules engine

1. Copy the InForm folder from the Oracle Central Designer image to the Oracle InForm application server.
2. Run `InstallCentralDesignerFiles.cmd`, located in the Oracle Central Designer image Oracle InForm folder.

   The `InstallCentralDesignerFiles` command installs and registers the Oracle Central Designer rules engine, as well as other files the Oracle InForm application uses for automated deployments.

> **Note**
>
> You only need to run the `InstallCentralDesignerFiles` command one time on the Oracle InForm application server. After the Oracle Central Designer rules engine is installed, it can be used by all the Oracle InForm studies on the server.

# Back up the Oracle InForm study and admin databases and files for the in-place upgrade

1. Stop the studies and servers, by typing the following commands in the order listed:

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

   ```
   pfadmin stop server <servername>
   ```
2. Stop all InForm applications and integrations that require the Oracle InForm service, for example, the Oracle Central Designer application.
3. Stop the Oracle InForm service.
4. To back up the Oracle InForm study database, run `ExportDB.cmd` (located in the `<InstallationDirectory>\InForm\bin\DBOra folder`) on the Oracle InForm

database server to back up each Oracle InForm study database as a DMP file, using the following syntax:

```
ExportDB.cmd <TNS_Service_Name> <Physical_Directory_Path> <Dump_File_Name>
```

Where:

- **TNS_Service_Name** — TNS name for the database instance.
- **Physical_Directory_Path** — Location of the directory that you created on the Oracle InForm database server for the data pump.

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

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

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

You are prompted for the following values:

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

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

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

For example: `ExportDB.cmd trial1 /u01/app/oracle/dp_export pfst55.dmp`

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

5. To back up the InForm admin database, run `ExportDB.cmd` (located in the `<InstallationDirectory>\InForm\bin\DBOra` folder) on the InForm database server to back up each InForm study database as a DMP file, using the following syntax:

   ```
   ExportDB.cmd <TNS_Service_Name> <Physical_Directory_Path> <DMP_File_Name>
   ```

   Where:

   - **TNS_Service_Name** — TNS name for the database instance.
   - **Physical_Directory_Path** — Location of the directory that you created on the InForm database server for the data pump.

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

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

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

You are prompted for the following values:

- **orasystem_user** — Name of the Oracle database system user.
- **orasystem_user_pass** — Password for the Oracle database system user.
- **admin_user** — Name of the Oracle InForm admin database schema owner.
- **admin_user_pass** — Password for the owner of the Oracle InForm admin database schema.

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

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

For example: `ExportDB.cmd trial1 /u01/app/oracle/dp_export pfst62.dmp`

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

6. Export the Oracle InForm registry keys from all servers, including the Oracle InForm server and the Reporting and Analysis server, found in the following locations:
   - `HKLM\SOFTWARE\OracleHS`
   - `HKLM\SOFTWARE\ODBC.INI`
   - `HKLM\SOFTWARE\Wow6432Node\Microsoft\Windows\CurrentVersion\Uninstall\{BF0ACB61-BCAB-4364-A881-76863CD9CCF2}`

   For example:

   ```
   C:\>reg export HKLM\SOFTWARE\OracleHS OracleHS-Backup.reg
   C:\>reg export HKLM\SOFTWARE\ODBC.INI OdbcIni-Backup.reg
   C:\>reg export
   HKLM\SOFTWARE\Wow6432Node\Microsoft\Windows\CurrentVersion\Uninstall\
   {BF0ACB61-BCAB-4364-A881-76863CD9CCF2} InFormUninstall-Backup.reg
   C:\>
   ```

7. Backup the Microsoft Visual C++ Runtime by creating a folder for the runtime files backup, and copying the following files:
   - %SYSTEMROOT%\System32\vcruntime140*.dll
   - %SYSTEMROOT%\System32\vccorlib140*.dll
   - %SYSTEMROOT%\System32\msvcp140*.dll
   - %SYSTEMROOT%\System32\concrt140*.dll
   - %SYSTEMROOT%\System32\mfc140*.dll
   - %SYSTEMROOT%\System32\mfcm140*.dll
   - %SYSTEMROOT%\System32\vcamp140*.dll
   - %SYSTEMROOT%\System32\vcomp140*.dll

For example:

```
C:\>mkdir Runtime-Backup
C:\> copy %SYSTEMROOT%\System32\vcruntime140*.dll Runtime-Backup
C:\> copy %SYSTEMROOT%\System32\vccorlib140*.dll Runtime-Backup
C:\> copy %SYSTEMROOT%\System32\msvcp140*.dll Runtime-Backup
C:\> copy %SYSTEMROOT%\System32\concrt140*.dll Runtime-Backup
C:\> copy %SYSTEMROOT%\System32\mfc140*.dll Runtime-Backup
C:\> copy %SYSTEMROOT%\System32\mfcm140*.dll Runtime-Backup
C:\> copy %SYSTEMROOT%\System32\vcamp140*.dll Runtime-Backup
C:\> copy %SYSTEMROOT%\System32\vcomp140*.dll Runtime-Backup
C:\>
```

8. Backup the Microsoft VC++ Runtime Registry.

   There are multiple occurrences that can have different paths, so first locate the entries and note the key paths.
   Both 32 and 64 bit registry entries must be backed up.

```
C:\>reg query
HKLM\SOFTWARE\Microsoft\Windows\CurrentVersion\Uninstall /s /f "Microsoft
Visual C++" /reg:64
HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows\CurrentVersion\Uninstall\{455
DF12C-7D43-4EFF-AE2F-43C8AF2817A3}
    DisplayName    REG_SZ    Microsoft Visual C++ 2019 X64 Minimum Runtime
- 14.28.29914
HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows\CurrentVersion\Uninstall\{5A2
3DBE2-A05C-4A9C-9C17-EA88BF5D7B43}
    DisplayName    REG_SZ    Microsoft Visual C++ 2019 X64 Additional
Runtime - 14.28.29914
End of search: 2 match(es) found.
C:\>reg query
HKLM\SOFTWARE\Microsoft\Windows\CurrentVersion\Uninstall /s /f "Microsoft
Visual C++" /reg:32
HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows\CurrentVersion\Uninstall\{43d
1ce82-6f55-4860-a938-20e5deb28b98}
    DisplayName    REG_SZ    Microsoft Visual C++ 2015-2019
Redistributable (x64) - 14.28.29914
End of search: 1 match(es) found.
C:\>
```

   Export each of the located registry keys.

> **Note**
>
> You must use unique file names.

```
C:\>reg export
HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows\CurrentVersion\Uninstall\{455
DF12C-7D43-4EFF-AE2F-43C8AF2817A3} RuntimeBackup\runtime64-1.reg /reg:64
The operation completed successfully.
C:\>reg export
HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows\CurrentVersion\Uninstall\{5A2
3DBE2-A05C-4A9C-9C17-EA88BF5D7B43} RuntimeBackup\runtime64-2.reg /reg:64
```

```
The operation completed successfully.
C:\>reg export
HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows\CurrentVersion\Uninstall\{43d
1ce82-6f55-4860-a938-20e5deb28b98} RuntimeBackup\runtime32-1.reg /reg:32
The operation completed successfully.
C:\>
```

9. Create a backup copy of the OracleHS folder:

   For example:

   ```
   C:\> xcopy /E \OracleHS \OracleHS-backup\
   C:\>
   ```

10. For each Oracle InForm study that includes the Reporting and Analysis module, ensure that all users move the content in their My Folders area to the study folder in Public Folders.

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

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

## Update the Oracle InForm application server software

Before you run the in-place upgrade for this Oracle InForm software release, you must update the application server to meet the software requirements listed in the *System Requirements*.

1. Stop all studies and services, using the following commands:

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

   ```
   pfadmin stop server <servername>
   ```

2. Reboot the Oracle InForm application server.
3. Upgrade the software components as required by the System Requirements, including Microsoft .NET Framework 4.8.
4. Make sure that the National Language Support registry settings for the database client are correct.

   The NLS_LANG and NLS_SORT entries are located in the following registry key on the Oracle InForm application server:

   ```
   HKEY_LOCAL_MACHINE\SOFTWARE\ORACLE\<Oracle_client_home_key>
   ```

5. Reboot the Oracle InForm application server.

## Upgrade the database parameters

1. Open a Command Prompt window.

2. Log in to SQL*Plus with `/nolog`.
3. At the SQL*Plus prompt, type the following commands in the order listed:

   ```
   ALTER SYSTEM SET "_optimizer_cost_based_transformation"=LINEAR;
   ALTER SYSTEM SET "_push_join_predicate"=TRUE;
   ALTER SYSTEM flush shared_pool;
   ALTER SYSTEM flush buffer_cache;
   ```

   This resets the parameters to the default value. However, the old value for these parameters appears in the v$parameters listing until a system is rebooted to clear the state.

## Deploy the 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;
   ```

# Run the in-place upgrade

> **Note**
>
> Prior to running an in-place upgrade, you must stop all studies, services, and other integrations, such as Oracle InForm Adapter and Oracle InForm Publisher Publisher.

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

> **Note**
>
> The in-place upgrade automatically runs the RECREATEREVIEWSCHEMA command at the end of the upgrade process. You do not need to run it manually unless you need to correct any recreate review schema problems.

1. Navigate to the folder where you extracted the contents of the ISO file, and run the `setup.exe` file located in the Oracle InForm installer. Then, the installation wizard opens.
2. Click **Next**.

   The Account Configuration page appears.

   a. In the **Database Connection String** field, enter the database connection **string**.

   b. In the first **Oracle DBA User** field, enter the Oracle database **DBA user**.

   c. In the second **Oracle DBA User** field, enter the Oracle database **DBA user password**.
3. Click **Next** to start the upgrade program.

   Running the in-place upgrade wizard upgrades the Oracle InForm software suite.
4. When the upgrade completes, click **Finish**.
5. Clear the Client browser cache.

   > **Note**
   >
   > If the in-place upgrade fails for any reason, use the backup files you created in Back up the Oracle InForm study and admin databases and files for the in-place upgrade to restore your previous Oracle InForm environment.

   For more information, see Restore an InForm 7.0 release.

# Enable network access rights for automated study deployments on the Oracle InForm application server

To enable the network access rights for automated deployments, modify the Local Security Policy on the InForm application server:

1. Click **Start > Administrative Tools > Local Security Policy**. The Local Security Policy window appears.
2. Select **Local Policies > Security Options**.
3. In the **Policy** pane, right-click **Network Access: Do not allow storage of passwords and credentials for network authentication**, and select **Properties**. The Network Access: Do not allow storage of passwords and credentials for network authentication Properties window appears.
4. Select **Disabled**.
5. Click **OK**.

# Create new database objects for the review schema (Optional)

Before you create the new database objects for the review schema, see Database and file customizations.

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

> **Note**
>
> The in-place upgrade automatically runs the RECREATEREVIEWSCHEMA command at the end of the upgrade process. You do not need to run it manually unless you need to correct any recreate review schema problems.

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

1. Ensure that the study is stopped.

   (Optional) <Enter a step example.>
2. Run the pfadmin RECREATEREVIEWSCHEMA command to apply any fixes to the review schema and to create new tables for the review schema, using the following syntax:

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

   where:

   **Trial_Name** — Name of the study for which you are creating the review schema.

**StudyLocale_ISO_name** — Name of the InForm Study Locale language.

The `pfadmin RECREATEREVIEWSCHEMA` command creates the following log files in the `<Deployment_root>\<studyname>\logs` folder:

- Install_ Clinical_<trialname>_<currentdate>_<currenttime>.txt
- Install_ Fixed_<trialname>_<currentdate>_<currenttime>.txt
  The Deployment root folder is defined in the `HKEY_LOCAL_MACHINE\SOFTWARE\OracleHS\InForm DeployRoot` registry value. By default, it is the InFormDeploy folder on the drive where the InForm application is installed. For example: `E:\InFormDeploy`.

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

## Start the Oracle InForm study and server

1. Re-boot the Oracle InForm application server.
2. Start the Oracle InForm service.
3. Start the installed study and server, by typing the following commands in the order listed.

   ```
   pfadmin start server <servername>
   ```

   ```
   pfadmin start trial <studyname>
   ```

## Update subject workflows

Update the subject workflow following updates and package deployment.

- In a command prompt, run:

  pfadmin updateworkflow <studyname>

4

# Upgrading and migrating the reporting environment

In this chapter:



## Migrating the reports to a new machine

You can migrate the reporting environment for any supported Oracle InForm study to a new machine. You must install a new Cognos Analytics 11 Reporting environment, and create, export, and then import your export packages.

In-place upgrades are not supported for Oracle InForm 7.0.

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

- Install and configure the Cognos environment
- Create an export package and export the data from your Cognos environment
- Run the PFCognosConfig utility
- Run PFRInit to set up the reporting environment
- Import the export package
- Modify the PFRSetupTrial.xml file
- Run PFRInit on the Oracle InForm application server
- Delete obsolete reports
- Restart the Oracle InForm Model Updater service
- Revalidate custom reports
- Update schedules and jobs
- Delete the study organizational units from the LDAP configuration
- Configure the study URL for CRF links
- Clear the Client browser cache

### Install and configure the Cognos environment

In this section:

- Install and configure the Cognos Analytics 11 software
- Identify or create the required users for any InForm study

## Install and configure the Cognos Analytics 11 software

1. Install the Cognos Analytics 11 64-bit software on the Cognos servers.

> **Note**
>
> For information on how to install and customize the Cognos Analytics 11 software, see the InForm Reporting Cognos Installation Guides on the Oracle Help Center.

2. Customize the Cognos Analytics 11 software on the Cognos servers.
   a. Run the Cognos Analytics Customization for InForm wizard on all Report and Content Manager servers.
   b. Run the Cognos Analytics Gateway Customization for InForm wizard on all Gateway servers.
3. Start the Cognos Analytics 11 Reporting servers.

For more information, see the *Installation Guide* and the *InForm Reporting Cognos Installation Guides* on Oracle Help Center.

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

Before you start the Cognos upgrade, make sure that the following users exist so that you can log in to the Cognos Analytics 11 Reporting server:

- A Cognos user who is a System Administrator.
- An InForm study user who is assigned to a rights group that includes the Reports right and is also a member of the Directory Administrators reporting group.
- An InForm study user (`pfreportinguser`) who is a member of the Sponsor Users and Publishers reporting group.
  The `pfreportinguser` will be used for the first time by the `pfmodelupdater` service. The `pfmodelupdater` service uses the `pfreportinguser` user name and password to generate the clinical model.
- If necessary, configure the `pfreportinguser` account.
  For more information, see the *Installation Guide*.
- Change the password for the `pfreportinguser` using both the user interface and the pfadmin command.
  – Log in to the InForm application and change the password for the pfreportinguser using the user interface.
  – Change the password for the pfreportinguser using the following command:

    ```
    pfadmin setserver pfreportinguserpw <studyname>
    ```

    When prompted, enter the password for the `pfreportinguser`.

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

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

  ```
  pfadmin setserver reportingcapadminpw<studyname>
  ```

  When prompted, enter the password for the `reportingcapadmin` user.

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

1. Enter the text of the first step here.

   (Optional) Enter the result of the step here.

2. Enter the text of the second step here.

   (Optional) Enter the result of the step here.

(Optional) Enter the result of the procedure here.

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

In this section:



## About the export package

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

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

You will import these packages into the Cognos Analytics 11 Reporting environment after you install this Oracle InForm software release and the Cognos Analytics 11 Reporting software.

Because the current Cognos environment remains intact until the Cognos Analytics 11 Reporting environment is active, there is no need to back up any files on the Cognos server except for the export packages.

> **Note**
>
> Because the current Cognos environment may remain intact while the Cognos Analytics 11 Reporting environment is being tested, it is good practice to remove or disable scheduled reports in the current environment prior to the migration.

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

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

   The Export wizard appears.
9. Enter a name for the export package, and complete the fields on the **Description** page.
10. Select **Next**.
11. On the **Choose a deployment method** page, ensure that the **Select public folder and directory content** option is selected, and click **Next**.
12. On the **Select the public folders content** page, in the Public Folders content section, select the **trial folder**, the **operational package** (`<trial_name>` InForm Trial Management), and the **clinical package** (`<trial_name>` Clinical).
13. You can also add a user's **My Folders** content in the export package:
    a. From the **Directory** folder, open the **informcap** subfolder.
    b. Select the user you want include in the export package.
    c. Select **Add to** to include the My Folders content for the selected user.
14. Update the settings on each page for the export deployment package as listed in the following table.

| Section | Option | Setting |
|---|---|---|
| **Public folders content page** | | |
| Public folders content section | Disable after import | Selected for the study folder, the operational package, and the clinical package |
| Options section | Include report output version | Selected |
| Options section | Include run history | Selected |
| Options section | Include schedules | Selected |
| **Directory content page** | | |

| Section | Option | Setting |
|---|---|---|
| Directory content | Include Cognos groups and roles | Deselected |
| Directory content | Include distribution lists and connections | Deselected |
| Directory content | Include data sources and connections | Deselected |
| **General options page** | | |
| Access permissions | Include access permissions | Deselected |
| External namespaces | Set the owner to | The user performing the import |
| Entry ownership | Set the owner to | The user performing the import |
| Entry ownership | Apply to | New entries only |

15. Click **Next**.
16. On the **Specify a deployment archive** page:
    a. Select the **Encrypt the content of archive** checkbox.
    b. Click **Set the Encryption password**.
    c. Enter a password for the archive, and click **OK**.

> **Note**
>
> The password you create for the deployment archive is the password you enter when you run the `ImportUtility`. For more information, see Run the Reporting Import Utility.

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

## Copy the export package to the new Cognos server

- Copy the export package from the source Cognos installation directory to the new Cognos server installation directory.

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

## Run the PFCognosConfig utility

Run the `PFCognosConfig` utility (located in the `<InstallationDirectory>\InForm\bin folder`) on the Oracle InForm application server to configure an Oracle InForm study to work with the Cognos Analytics 11 Reporting application.

For more information, see the *Installation Guide*.

## Run PFRInit to set up the reporting environment

To configure the reporting environment, run the `PFRInit` utility with the `SETUPINFORM` parameter on the Oracle InForm application server for this release and on the Cognos Analytics 11 server . The utility is located in the `<InstallationDirectory>\InForm\bin` folder.

**On the Oracle InForm application server for this release:**

Run the `PFRInit` utility with the `SETUPINFORM` parameter, and when prompted, enter 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.

**On the Cognos Analytics 11 server:**

Run the `PFRInit` utility with the `SETUPINFORM` parameter, and when prompted, enter the following parameter:

`dispatcher_url` — Internal URI that the InForm server uses to communicate with the Cognos Analytics 11 server.

## Import the export package

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

Use this command to migrate your export package into the Oracle InForm environment for this release.

- Run the Reporting Import Utility

## Run the Reporting Import Utility

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

```
ImportUtility -all
```

When prompted, enter the:

- Cognos system administrator user namespace.

- User name for the Cognos system administrator.
- Cognos system administrator password.
- Internal URI that the Oracle InForm server uses to communicate with the Cognos Analytics 11 server.
  This Cognos Analytics 11 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 System Configuration page in the Oracle InForm Admin user interface.
- Name of the deployment package containing the reporting content you want to import into the Reporting server.
- Password for the deployment package.
- Custom Authentication Provider (CAP) namespace (informcap).
- InForm study user with Reporting rights who is a member of the following Reporting groups:
  - Publishers
  - Either Sponsor User or Site users
- Password for the Oracle InForm study user.
- Name of the Oracle InForm study.
- The organization ID is optional.
  This parameter is required only for Oracle-hosted studies in a single sign-on environment.

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

The ImportUtility command:

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

For more information, see the *Installation Guide*.

# Modify the PFRSetupTrial.xml file

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

1. In the **TrialFolder** section, change the **UserRoot** tag to **ReportsUpgrade**.

   ReportsUpgrade is a tag that triggers the reporting specification upgrade.

2. Change the value of the **connectionstring** from `dbconnectionstring` to the Oracle connection string for the Reporting and Analysis database.

   In a single database configuration, use the study database connection string.

3. Update the `DBUID` parameter with the UserID of the study owner.

4. When you run the `PFRInit` command you have to pass the following parameters on the command line:

   a. `sysadmin_namespace` — Oracle Directory Server admin namespace.

   b. `sysadmin_uid` — User name for the Oracle Directory Server admin namespace.

   c. `sysadmin_pass` — Password you chose when creating the Oracle Directory Server admin namespace user.

   d. `publisher_namespace` — Custom Authentication Provider (CAP) namespace. Enter informcap.

   e. `publisher_uid` — Oracle InForm study user who is a member of the Publisher and Sponsor Users (or Site Users) Reporting groups.

   f. `publisher_pass` — Password of the Oracle InForm study user.

   g. `dispatcher_url` — Internal URI that the Oracle InForm server uses to communicate with the Cognos Analytics 11 server.

   h. `trial_name` — Name of the InForm study.

   i. `reportdb_pass` — Study PID.

   j. `same_env_report_upgrade` — Indicate if the PFRInit command is being run as part of an upgrade in an existing environment. Values are Y or N.

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

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

## Run PFRInit on the Oracle InForm application server

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

The PFRInit command:

- Creates a new operational package called `<studyname> InForm Trial Management` in the Public Folders.
- Upgrades the specifications of standard reports in the trial folder.
- It upgrades only standard reports that are part of this release.
- Sets permissions on the trial folder and packages for a specific study.

If the command is not run, the packages and the trial folder are only visible to the System Admin user.

## Delete obsolete reports

Perform these step to remove any obsolete reports that were not removed in a previous migration.

1. Log in to an Oracle InForm study as a user who has the Reports right and is a member of the Publishers, Site Users or Sponsor Users, and User Info Data Users Reporting groups.
2. Click **Reports** in the navigation toolbar. Reporting opens in a new browser window/tab depending on your browser settings.
3. Navigate to the **Team content** folder on the left.
4. Click the `<study name>` folder.
5. Navigate to the folder containing the obsolete report, right-click on the report to delete, and click **Delete**.

> **Note**
>
> If a report was deleted in a previous migration, the report will not appear in the folder.

The following report was removed in Oracle InForm 6.3:

- Audit Trail Reports folder
  - Audit Trail Report report

The following reports were removed in all release streams after Oracle InForm 4.6.x. Deleting the following reports is required only if you are upgrading from any Oracle InForm 4.6 studies:

- CRF Reports folder
  - CRF Cycle Time Detail by User report
  - CRF Site Performance Summary by User report
  - CRF Aging by User report
- Subject Reports folder
  - Case Book Completion and Query Summary
  - Subject Enrollment Status by User report
- Query Reports folder
  - Query Volume by Month by User report

## Restart the Oracle InForm Model Updater service

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

2. Stop and start the **InForm Model Updater** service to force the immediate clinical model generation for all the upgraded Oracle InForm studies.

## Revalidate custom reports

1. Revalidate the custom reports and, if necessary, modify the reports for the new operational packages.You revalidate the custom reports by running them and comparing the output to the expected output based on the previous release.
2. Revalidate all the custom clinical reports or reports from previous releases for the new clinical model in order to access all the enhancements in this release.
   - If you have access to Cognos Reporting, open the custom clinical report in Cognos Reporting, validate, and save the report.
   - If you do not have access to Cognos Reporting, in the Welcome portal:
     a. On the left, select **Team content**, and navigate to the folder where the custom reports are stored.
     b. Hover over the report name, and select **More** ( ) on the right.
     c. Click **Edit report**.
     d. On the left, select **Data**, and then select the **Source** tab.
     e. Select the + sign, then select the package `<studyname> InForm Trial Management`, and click **Open**.
3. Run all the custom clinical reports, and compare the output to the expected output based on the previous release.

## Update schedules and jobs

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

1. Log in to the Reporting and Analysis module as an administrator.
2. On the left of the page, click **Manage**, and click **Administration console**.
3. In the **Status** tab, click **Schedules**.
4. Modify and save each listed schedule and job.
   a. Click the drop-down list next to the schedule name.
   b. Click **Modify the Schedule**.
   c. Make any modification (such as changing the start time by one minute), and click **OK**.
5. Ensure that study users copy their My Folders content from Public Folder to My Folders.

## Delete the study organizational units from the LDAP configuration

LDAP is not used to authenticate study users in this Oracle InForm release.

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

## Configure the study URL for CRF links

To enable CRF links in reports, run the following command for each study to set the study URL:

```
pfadmin setserver TrialURL <studyname> <studyURL>
```

For Oracle-hosted single sign-on (SSO) studies, enter the vanity URL that is used to access the study.

## Clear the Client browser cache

After you complete the reporting migration steps, clear the Client browser cache.

# Running an in-place upgrade of your reports

1. Ensure that you have run the in-place upgrade on the Oracle InForm server.

   For more information, see Run the in-place upgrade. Running the in-place upgrade wizard upgrades the core Oracle InForm software and installs the `Op package and reports 7_0_1_1.zip` file that you use to upgrade the reporting environment.
2. Copy the `Op package and reports 7_0_1_1.zip`, located in the `<Installation_Directory>\InForm\Bin\DBOra\Reporting` folder on the Oracle InForm application server, to the `<Installation_Directory>\deployment` folder on the Cognos server.
3. Modify the `PFRSetupTrial.xml` file.

   For more information, see Modify the PFRSetupTrial.xml file
4. Run PFRInit.

   For more information, see Run PFRInit to run set up reporting for each study.
5. Clear the Client browser cache.

# Running an isolated Cognos upgrade

As of Oracle InForm release 6.2, the IBM Cognos Analytics application can be upgraded independently of new Oracle InForm versions (for selected Cognos patch and versions certified by Oracle).

For instructions on running an isolated Cognos upgrade, see the *Oracle InForm Reporting Cognos Installation Guide* on the Oracle Help Center.

5

# Oracle InForm registry key reference

In this appendix:



## About registry key migration

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

- HKLM\Software\OracleHS\AuthenticationFilter
- HKLM\Software\OracleHS\InForm
- HKLM\Software\OracleHS\InForm\PFAppMngr
- HKLM\Software\OracleHS\InForm\PFImport
- HKLM\Software\OracleHS\InForm\PFMngrExecutionPlan
- HKLM\Software\OracleHS\InForm\PFMngrTrial
- HKLM\Software\OracleHS\InForm\PFQuery
- HKLM\Software\OracleHS\InForm\UDA

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

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

- HKLM\Software\OracleHS\InForm
- HKLM\Software\OracleHS\InForm\PFAppMngr
- HKLM\Software\OracleHS\InForm\PFImport
- HKLM\Software\OracleHS\AuthenticationFilter
- HKLM\Software\OracleHS\InForm\PFMngrExecutionPlan
- HKLM\Software\OracleHS\InForm\PFMngrTrial
- HKLM\Software\OracleHS\InForm\PFQuery
- HKLM\Software\OracleHS\InForm\UDA

## HKLM\Software\OracleHS\InForm

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

## HKLM\Software\OracleHS\InForm\PFAppMngr

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

## HKLM\Software\OracleHS\InForm\PFImport

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

## HKLM\Software\OracleHS\AuthenticationFilter

| Name | Description |
|---|---|
| ByPassKeyPhrase | Exclude some URLs from processing by authentication filter. |
| DomainSuffix | Domain Suffix. |
| FilterEnabled | Enable/disable the authentication filter. |

## HKLM\Software\OracleHS\InForm\PFMngrExecutionPlan

| Name | Description |
|---|---|
| FromAddress | Email From Address. |

## HKLM\Software\OracleHS\InForm\PFMngrTrial

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

## HKLM\Software\OracleHS\InForm\PFQuery

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

## HKLM\Software\OracleHS\InForm\UDA

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

# 6
# Command and script reference appendix

In this appendix:



## 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. |

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

| Parameter | Description |
|---|---|
| | – filespec = Filename for the log file.<br>– Overrides the logfile-name for the log file.<br>– Does not change logfile-path. |

### 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 InForm Database Administrator (for example, pfadmin)
- **Admin_user_pass** — Password for the 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.<br><br>**Note**<br>The path must conform to the proper OS path format, and the path is expected to be case-sensitive. |
| dump-file-name | Filename of the dump file to import.<br><br>**Note**<br>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.<br>The log file defaults to being named **ImportDB.log**.<br><br>The log file path defaults to the current working directory.<br><br>Options:<br>• /LogFile:[filespec]<br>– `filespec` = fully qualified name and path for created log file. If a relative path is given, it is based from the current working folder. |

| Parameter | Description |
|---|---|
| | – Overrides the `logfile-path` to be the resolved path to the given `filespec`.<br>– Do not specify this if either of the other logging options are specified.<br>• /LogFilePath:[pathspec]<br>– `pathspec` = fully qualified path to create the log file in. If a relative path is given, it is based from the current working folder.<br>– Overrides the `logfile-path` to be the resolved path to the given `pathspec`.<br>– Does not change `logfile-name`.<br>• /LogFileName:[filename]<br>– `filespec` = Filename for the log file.<br>– Overrides the `logfile-name` for the log file.<br>– Does not change `logfile-path`. |
| 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.<br>For example:<br>`remap_schema=oldschemaownerid:newschemaownerid`<br>`remap_tablespace=oldtablespacename:INFORM`<br>See the impdp documentation for details on import options. |
| /NotTrial | Prevents pre-import tablespace analysis of the schema prior to importing.<br>This behavior is only 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 InForm Database Administrator User (for example, `pfdbadmin`).
- **Pfdbadmin_user_pass** — Password for the 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 pfst631uid /accountparams:myparamfile.txt

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

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

# 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` folder.

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

| Parameter | Description |
|---|---|
| | – Overrides the `logfile-name` for the log file.<br>– Does not change `logfile-path`. |

### Command line prompts

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

- **InForm Database Adminstrator User Name** — Name of the Oracle InForm Database Administrator User (for example, pfdbadmin).
- **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 User (for example, `pfdbadmin`).
- **Pfdbadmin_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 file 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 InForm registry
- **pfadmin_view_service.txt** — Text file containing the information for the servers and studies running on the 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 ifOracle 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` folder.

### 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. |
| 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. |

| Parameter | Description |
| --- | --- |
| | **Note**<br>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:<br>remap_tablespace=oldtablespacename:INFORM<br>remap_schema=oldschemaname:newschemaname |
| ignorederrors | Optional path to text file containing list of errors to be ignored during import.<br>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.<br>**Note**<br>Contact Oracle Global Support for assistance if the import fails. This parameter is for advanced/internal Support use only. |
| resumelabel | Internal label to resume operations at. |

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

| Parameter | Description |
|---|---|
| | – Overrides the `logfile-name` for the log file.<br>– Does not change `logfile-path`. |

### Command line prompts

If using prompting, you are 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. |
| 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.<br>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.<br>Defaults to `<trial-schema-owner-id>.dmp` if not specified. |
| Dump File InForm Version | The full version of Oracle InForm that the study was exported from (for example, 7.0.0.1). |
| Trial Type | Study type for the imported study.<br>• LIVE<br>• UAT |

| Parameter | Description |
|---|---|
| | • TRN<br>• DEV<br>• QA |
| Trial Approval | TRUE if you require approval for any deployment package.<br>FALSE if your study does not require deployment package approval.<br>**Note**<br>By default, Live and UAT studies require study approval. |
| Deployment Backup Folder | Path on the 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).<br>For example: `/u01/app/deploybackup`.<br>**Note**<br>The physical path must exist before you run the ImportMigrationFiles command. |
| Deployment Service Port | Port number for Central Designer to communicate with the InForm application server to transmit deployment packages.<br>Defaults to 14040 if left blank. |
| Auth Service Port | Port number for the InForm application server to authenticate users for the Reporting and Analysis module.<br>Defaults to 14041 if left blank. |
| ODM Service port | Port number for the Clinical Data API to exchange SOAP requests through HTTP.<br>Defaults to 14042 if left blank. |

| Parameter | Description |
|---|---|
| Oracle InForm Adapter Schema Owner User ID | Oracle InForm Adapter Schema User ID if the study is to be registered with InForm Adapter.<br><br>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.<br><br>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 InForm Adapter.<br><br>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.<br><br>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.<br><br>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. |

| Parameter | Description |
|---|---|
| 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, 7.0.0.1). |
| Trial_type | The different available types are:<br>• UAT<br>• LIVE<br>• TRN<br>• DEV<br>• 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 parameters:

| | |
|---|---|
| From_user | Study Owner User ID in source environment if different from trial_user.<br>Not needed if the Schema Owner User ID is not being changed for the target Application Server. |
| Pfdbauid | Oracle InForm Database Administrator User ID.<br>Defaults to pfdbadmin if not specified. |
| Dump_file_name | Trial Schema dump filename.<br>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.<br>Recommended port is 14040. However, any port other than 80 or 443 can be used. |

| | |
|---|---|
| | Defaults to 14040 if not specified. |
| Auth_service_port | HTTP port number for Oracle InForm to authenticate users for the Reporting and Analysis module.<br><br>Recommended port is 14041. However, any port other than 80 or 443 can be used.<br><br>Defaults to 14041 if not specified. |
| Odm_service_port | HTTP port number for the Clinical Data API to exchange SOAP requests.<br><br>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.<br><br>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 InForm Adapter. |
| Adapter_user_pass | Oracle InForm Adapter Schema PID if study is to be registered with InForm Adapter. |
| Adapter_Url | Oracle InForm Adapter URL if study is to be registered with InForm Adapter. |
| Publisher_trial_name | Study name as it appearsin 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 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.

# 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]
```

Where:

| 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>`.<br>• Creates the import specification object on the Reporting server accessible to system administrators.<br>• Imports the content from a password-protected deployment package to the |

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

| Option | Parameter |
|---|---|
| | • Creates the import specification object on the Reporting server accessible to system administrators.<br>• Imports the content to the `SecureImport_<timestamp>` folder.<br>• 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 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 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.

# 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 ]
```

Where:

| Option | Purpose and Syntax |
|---|---|
| CHECKREG [/Del] [/DelAll] | Displays the current Oracle InForm Server COM and MTS components in the NT registry.<br><br>**Note**<br>Be careful to remove the server(s) or uninstall the service before using either of the delete options:<br>• [/Del]—Removes obsolete settings.<br>• [/DelAll]—Removes the settings of all servers. |
| CONFIG Service | Configures an existing service. |

| Option | Purpose and Syntax |
| --- | --- |
| [/AdminDB DBServer ] \|<br>[/AdminDSN DsnName ] \|<br>[/AdminDN ] \|<br>[/EmailSender valid_email_address] \|<br>[/PfUser ] \|<br>[/SysDBA ]<br>[/HelpUrl URL of internal help site index.html page]<br>[/SearchUrl “https://docs.oracle.com/apps/search/search.jsp?category=industries&product=product_id&q=”] | • [/AdminDB DBServer [SQL]]—Sets the ODBC DSN for the InformAdmin database. Make sure that DBServer, UID, and PID are the same ones that were used to create the InformAdmin database. Use alphabetic or alphanumeric characters for the UID and PID, and begin them with a letter; do not use all numeric characters.<br>• [/AdminDSN DsnName ]—Creates the ODBC DSN InForm software with the default database server, using the specified user name and password. Use alphabetic or alphanumeric characters for the UID and PID, and begin them with a letter; do not use all numeric characters.<br>• [/EmailSender valid_email_address]—Creates the PFMngrExecutionPlan registry key and populates the EmailSender subkey with an email address to use during autodeployment notifications.<br>• [/PfUser]—Creates the PfUser_computername account during the InForm installation. The account is for Microsoft MTS packages used by 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 InForm Service with the new password.<br>• [/SysDBA ]—Sets the InForm Service DBA user name and password. You can use this command to change the pfdbadmin password as needed.<br>If you want to change the 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 InForm Service to use the new InForm Service DBA.<br>Use alphabetic or alphanumeric characters for the UID and PID, and begin them with a letter; do not use all numeric characters.<br>• [/HelpUrl URL of internal help site index.html page]—Changes the help link |

| Option | Purpose and Syntax |
|---|---|
| | in the InForm user interface so that it points to a local URL instead of the default location on the Oracle Help Center (OHC).<br>• [/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.<br>To update the Help location, refer to the *User Guide for Administrators*. |
| CONFIG Server *ServerName*[Automatic\|Manual] | Configures the startup mode for an existing server as either Automatic or Manual. |
| CONFIG Trial TrialName [Automatic \| Manual]<br>\|[/TriDSN *DSN* \|<br>[/RndDSN *DSN*] \|<br>[/Rnd [TNS_Service_Name ]]<br>\|[/Host *ServerName*]<br>[/TrialType [UAT \| LIVE \| TRN \| DEV \| QA]] \|<br>\|[/TrialApproval [TRUE \| FALSE]] \|<br>[/TrialMaintenance [ON \| OFF]] \|<br>[/DeployBackupFolder <"path_to_a_database_server_folder">] | Configures an existing study.<br>• [Automatic \| Manual]—Configures the study startup mode.<br>• [/TriDSN DSN ]—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.<br>• [/RndDSN DSN]—Configures the study to use the randomization source dataset name.<br>• [/Rnd [TNS_Service_Name]—Creates a study randomization source dataset name.<br>• [/Host ServerName]—Moves the study from current host server to another server in the InForm Service.<br>• [/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.<br>• [/TrialApproval [TRUE \| FALSE]]—Specify whether a deployment package needs approval before it can be deployed to the InForm application. By default, Live and UAT studies are set to TRUE. Training, Dev, and QA studies are set to false.<br>• [/TrialMaintenance [ON \| OFF]]—Specify that a study is in Maintenance mode and is unavailable to users. This is set during study deployment. |

| Option | Purpose and Syntax |
|---|---|
| | • [/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 *TrialName* [Enable \| Disable] \|<br>[DSN [Active \| Inactive]] \|<br>[DSN StudyLocale] | Configures an existing CDD:<br>• [Enable \| Disable]—Enables or disables the CDD for a particular study.<br>• [DSN [Active \| Inactive]]—Makes a CDD DSN active or inactive for a particular study.<br>• [DSN StudyLocale]—Specifies the study locale used for the unit symbol translation that is stored in the CDD column for the unit symbol.<br>• path_to_dsn_password_file—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. |
| CONFIG WEBSERVICE *TrialName*[AuthService \| DeploymentService \| ODMSubmitService] [Add [HTTP:*port* \| HTTPS:*port* cert:*thumbprint*] \| Remove] | Associates a web service with a study and specifies the port number each service should use.<br>• [AuthService \| DeploymentService \| ODMSubmitService]—The type of service<br>• [Add [HTTP:port \| HTTPS:port cert:thumbprint] \| Remove]—Creates or removes an association between a study and a web service |
| CREATEREPORTINGMODEL *TrialName* | Creates the Reporting model from scratch. |
| HELP | Lists all the options of the pfdamin command. |
| KILLSERVER *ServerName* | Stops server MTS packages without stopping studies on the server. |
| PING *MachineName*1 \| 2 \| 3:*ServerName* \| *4:ServerName* \| 5:*ServerName* [Port#] | Pings the InForm Service or a particular server. The ping levels are:<br>• 1—Ping the InForm Service.<br>• 2—Ping the InForm Service and all InForm server(s).<br>• 3—Ping the specified server. |

| Option | Purpose and Syntax |
|---|---|
| | • 4—Ping and get information about the specified server.<br>• 5—Ping the specified server and dump the user session to a server-side file.<br>• [Port#]—Allows you to specify the port number the echo server is listening on, if you changed it. |
| PUBLISHREVIEWSCHEMA *TrialName* [/FORCE] | Applies all study version changes to the review schema clinical tables.<br>If you use the /FORCE option, the 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.<br>**Note**<br>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.<br>This operation is synchronous. The study is unavailable during the operation. |
| RECREATEREVIEWSCHEMA [TrialName StudyLocale_ISO_name] | Recreates the review schema database tables from the InForm schema. Depending on the size of the study, this can take a long time to run.<br>The Review schema study locale is chosen automatically when a study is first installed, but can be changed using this command. |
| REMOVE[Server *ServerName*] \|[Trial *TrialName* [/DSN]] \|[CDD *TrialName* [/All \| *DSN*] | Removes an existing server, study, or CDD.<br>• [Server ServerName]—Removes an InForm server from the InForm Service. Studies should be either reconfigured to other servers or removed before this command is run. |

| Option | Purpose and Syntax |
|---|---|
| | • [Trial TrialName [/DSN]]—Deletes the named study from the InForm Service. The Web virtual directories and folders for the study are physically removed. Use the /DSN option to remove the study-related DSNs.<br>• [CDD TrialName [/All \| DSN]—Removes either all CDD DSNs in the specified study or the given CDD by DSN.<br><br>**Note**<br>Before using the PFADMIN REMOVE command, verify that IIS is running. |
| RULESCANPROCESS *StudyName* | 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 *StudyName* | 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. |
| SETSERVER[Site *TrialName MachineName*] \| [MedMLInstaller *TrialName MachineName*] \| [Reporting *TrialName ReportingUrl*] \| [ReportingAN *TrialName AuthenticationNamespace*] \|[ReportingUR *TrialName UserRoot*] \|[ReportingInt *TrialName ReportingInternalURI]* \|[pfreportinguserpw *TrialName*] \|[systempw *TrialName*] \|[TrialURL *TrialName TrialURL*] | Changes the MedML and Site servers and sets the Reporting configuration settings.<br>• [Site TrialName MachineName]—Set a site for the study. MachineName is the host name.<br>• [MedMLInstaller TrialName MachineName]—Set the hostname for which MedML can be installed. MachineName is the host name.<br>• [Reporting TrialName ReportingUrl]—Set Cognos URL for study.<br>• [ReportingAN TrialName AuthenticationNamespace]—Set Cognos AuthenticationNamespace for study.<br>• [ReportingUR TrialName UserRoot]—Set Cognos UserRoot for study.<br>• [ReportingInt TrialName ReportingInternalURI]—Set the internal URI that the InForm server uses to communicate with the Cognos server. |

| Option | Purpose and Syntax |
| --- | --- |
| | • [pfreportinguserpw TrialName]—Run this pfadmin command after the password for the pfreportinguser is changed in the 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.<br>• [systempw TrialName]—Set the password for the system user for the specified study. The command also activates the system user.<br>• TrialURL TrialName TrialURL]—Set the vanity URL for the specified study. Enter the URL that you use to access the study, including the tenant name.<br><br>**Note**<br>The SETSERVER command requires that you set the Default Authentication Level property of the InForm server to Connect:To set this property:Select Administrative Tools > Component Services > My Computer - Properties.Set the Default Properties - Default distributed communication properties - Default Authentication Level value to Connect.<br><br>To set this property:<br>1. Select **Administrative Tools > Component Services > My Computer - Properties**.<br>2. Set the **Default Properties - Default distributed communication properties -** |

| Option | Purpose and Syntax |
| --- | --- |
| | **Default Authentication Level** value to Connect. |
| SETUP Server *ServerName* [Automatic] | Creates a new InForm server in the InForm Service.<br>• [Automatic]—The server is automatically started with the InForm Service. Manual startup is the default. |
| SETUP Trial *TrialName ServerName*[/DB *OracleConnStr]* |[/DSN *TriDSN* [Automatic] | Creates a study on the given 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 InForm server that hosts the study is started.<br>• [/DB OracleConnStr UID PID]—Creates an ODBC DSN TrialName with the given ServerName, UID, and PID. Use alphabetic or alphanumeric characters for the UID and PID, and begin them with a letter; do not use all numeric characters.<br>• [/DSN TriDSN UID PID [Automatic]]—Configures the created study TrialName to use the given study dataset name TriDSN, UID, and PID. The study must be present in the ODBC DSN. Use alphabetic or alphanumeric characters for the UID and PID, and begin them with a letter; do not use all numeric characters.<br>**Note**<br>Before using the /DSN command, verify that IIS is running. |
| SETUP CDD *RefName TrialName*/DB *OracleConnStr DSN*[/TBSP *OraTBSP*] [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.<br>• [/TBSP OraTBSP]—Defines the Oracle tablespace for the CDD schema.<br>• [Active]—Specifies that the DSN is transactional.<br>• [NoSchema]—Indicates that no new CDD schema should be created during setup. |

| Option | Purpose and Syntax |
| --- | --- |
| | 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.<br><br>**Note**<br>To execute this command successfully, the study must be started. |
| SETUP CDD *RefName TrialName*/DSN *DSN* [/TBSP *OraTBSP*] [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 *OraTBSP*]—Defines the Oracle tablespace for the CDD schema.<br>• [Active]—Makes the DSN transactional.<br>• [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.<br><br>**Note**<br>To execute this command successfully, the study must be started. |
| SETLANGUAGE<br>*[IsoLanguageName]*<br>\| en-US \| ja-JP \| | Sets the InForm product locale language. en-US and ja-JP are currently supported. |
| START[Server *ServerName*] \|[Trial *TrialName*] | Starts an existing InForm server or study.<br>• [Server ServerName]—Starts an existing InForm server by server name.<br>• [Trial TrialName]—Starts an existing study by study name. |
| START[Trial *TrialName* [/Design]] | Starts the study in design mode. This means you can install study components that are not completely designed (strict checking is not in |

| Option | Purpose and Syntax |
|---|---|
| | force). By default, the study starts in production mode. |
| STOP[Server *ServerName* [/Trials]] \|[Trial *TrialName* [/Anyway]] | Stops an existing InForm server or study.<br>• [Server ServerName [/Trials]]—Stops an existing 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.<br>• [Trial TrialName [/Anyway]]—Stops the named study. The Anyway keyword stops a study regardless of any connections or HTTP requests. |
| UNINSTALL | Removes all InForm servers and studies, and then removes the InForm service settings PfUser_*computername* and the MTS library package.<br>**Note**<br>The InForm service must be running for the command to work. |
| UPDATEWORKFLOW<br>[*StudyName* ["siteMnemonic"] [-UpgradeStudyVersion]] \|<br>[SetWFThreadsNumber *StudyName NumberOfThreads*] \|<br>[GetWFThreadsNumber *StudyName*] | Configures and performs the update workflow process.<br>• [StudyName [siteMnemonic] [ -UpgradeStudyVersion]]—Triggers the update workflow process.If a siteMnemonic is specified, the process is executed only at that site, otherwise it is executed at all sites. The siteMnemonic 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.<br>• [GetWFThreadsNumber StudyName]—Returns the current setting for the number of threads used for update workflow for the study. The default is 2.<br>• [SetWFThreadsNumber StudyName NumberOfThreads] —Sets the number of threads processing the workflow update |

| Option | Purpose and Syntax |
|---|---|
| | for the study. The value can be set between 1 and 32.<br><br>**Note**<br>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. |
| VIEW[Languages] \| [Service] \|[Server *ServerName*] \|[Trial *TrialName*] \|[CDD *TrialName*] \| [Reporting *TrialName*] | Displays a monitoring list of all servers in the InForm service, all studies in servers, or all RefNames for CDD DSNs configured for a study.<br>• [Languages]—Lists installed languages without starting the InForm Service.<br>• [Service]<br>– Lists all the servers and studies in the InForm service.<br>– Lists installed product languages as well as the actual installed product language.<br>• [Server ServerName]—Lists each server by server name and studies hosted on that server.<br>• [Trial TrialName]—Lists a study by its name.<br>• [CDD TrialName]—Lists the RefNames for each CDD DSN configured for the specified study.<br>• [Reporting TrialName]—Lists the current status of Reporting.<br>– States whether the study is configured for Reporting.<br>– Specifies the type of reporting setup, for example samedb.<br>– Specifies the reporting username.<br>– Gives the date of the last Cognos model update. |

| Option | Purpose and Syntax |
|---|---|
| | – Reports if the Reporting database is up-to-date.<br>– States whether Oracle streams are working properly (if applicable). |

### Command line prompts

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

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

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

For **pfadmin setserver** commands:

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

### Examples

Check the status of InForm Reporting:

```
pfadmin view reporting pfst63
```

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

```
pfadmin view service
```

Start the demo InForm server:

```
pfadmin start server demo
```

Start the sample study:p

```
fadmin start study sample
```

Stop all studies running on the demo 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 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"]
```

Where:

| 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.<br><br>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`.<br><br>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:

| Parameter | Description |
|---|---|
| trialname=<*studyname*> | Name of the Oracle InForm study.<br><br>**Note**<br>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.<br><br>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 InForm wizard. The parameter setting is stored in the `cogstartup.xml` file.<br><br>**Example**: http://www.example.com:80(443)/cognos/bi |
| dispatcher_uri=<*dispatcher_uri*> | Internal URI that the InForm server uses to communicate with the Cognos Analytics server. This Cognos parameter is set in the Cognos Analytics Customization for 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 InForm application.<br>Used when running command line utilities that perform SDK operations, such as pfrinit and DecomTrial. |

| Parameter | Description |
|---|---|
| | **Example:**http://www.example.com:9300/p2pd/servlet/dispatch |
| root_folder=/<*content*>/<*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*> | 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:<br>• study_name<br>• register_db_server<br>• register_db_user<br>• register_db_pass |

### Examples

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 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, the `<Installation_Directory>\InForm\bin` folder.

### Usage

```
pfrinit [setupinform]
```

Where:

| 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 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.

**Examples**

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

7

# Restoring an older release

In this appendix:



## Restore the previous Oracle InForm release

> **Note**
>
> If the in-place upgrade fails for any reason, use the backup files you created in Back up the InForm study and admin databases and files for the in-place upgrade to restore your previous Oracle InForm environment.

1. Open a Command Prompt window as an administrator.
2. Run the following command to stop all Oracle InForm studies.

   ```
   pfadmin /STOPALL
   ```

3. Run the following command to unregister the Oracle InForm services.

   ```
   \OracleHS\InForm\bin\regservers /s /f /u
   ```

4. Rename the OracleHS folder with the current version number (for example, **OracleHS-7011**).
5. Rename the folder containing the Oracle InForm files for the previous release (for example, *OracleHS-Backup*) to **OracleHS**.
6. Restore the Microsoft C++ Runtime files from the backup.

   ```
   copy /y Runtime-Backup\*.dll %SYSTEMROOT%\System32
   ```

7. Restore the Microsoft Runtime registry.

   > **Note**
   >
   > All backed up registry files must be restored to their original location.

   Using the file names from the example on the backup instructions page:

   ```
   reg import Runtime-Backup\runtime64-1.reg /reg:64
   reg import Runtime-Backup\runtime64-2.reg /reg:64
   reg import Runtime-Backup\runtime32-1.reg /reg:32
   ```

8. Restore the Oracle InForm registry.

Using the file names from the example on the backup instructions page:

```
reg import OracleHS-Backup.reg
reg import OdbcIni-Backup.reg
reg import InFormUninstall-Backup.reg
```

9. Run the following command to register the Oracle InForm services:

```
\OracleHS\InForm\bin\regservers /s
```

10. Run the following command to restore the Trial Server services:

> **Note**
>
> The PowerShell script is run from the **new** version files, not the version that is being restored.

```
powershell -ExecutionPolicy Bypass
\OracleHS-7011\InstallSupport\ResetTrialServersMtx.ps1
```

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

```
ImportDB.cmd <TNS_Service_Name> <Physical_Directory_Path> <DMP_File_Name>
<From_User>
```

Where:

- **TNS_Service_Name**—TNS name for the database instance.
- **Physical_Directory_Path**—Location of the directory that you created on the Oracle InForm database server for the data pump.
- **DMP_File_Name**—Name of the DMP file to import.
- **From_User**—Owner of the database schema being migrated.

You are prompted for the following values:

- **orasystem_user**—Oracle database system user.
- **orasystem_user_pass**—Password for the Oracle database system user.
- **trial_user**—Owner of the study schema created by the import.
- **trial_user_pass**—Password for the owner of the study schema created by the import.

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

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

For example:

```
ImportDB.cmd trial1 /u01/app/oracle/dp_export pfst621.dmp pfst621uid
```

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