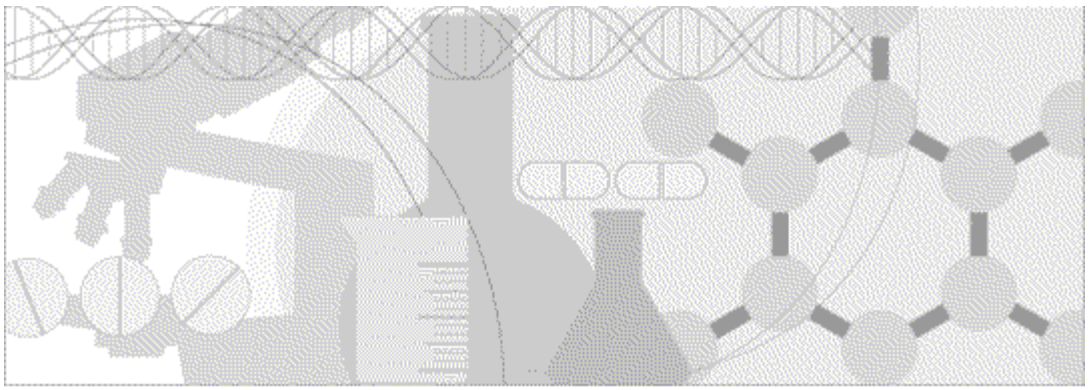
Upgrade and Migration Guide

Oracle® Health Sciences InForm 6.1.1.1



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CHAPTER 1

Upgrading and migrating to the InForm 6.1.1.1 release

In this chapter

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Overview of upgrading and migrating to this release

You can perform a new installation of the InForm 6.1.1.1 software, or you can upgrade and migrate to the InForm 6.1.1.1 software from a previous version of the InForm software.

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

To perform an upgrade and migration, perform the following steps, as needed:

- **Upgrade the database environment**—Use to upgrade to the Oracle 11g or the Oracle 12c database software.

  For more information, see *Upgrading the database environment* (on page 5).

- **Migrate the InForm studies**—Use to upgrade to the InForm 6.1.1.1 software from the InForm 4.6 SP2 release or later, or from any InForm 5.0, 5.5, 6.0, or 6.1 release using a series of scripts.

  Alternatively, for InForm 6.0 and 6.1 releases, you can perform an in-place upgrade. Oracle does not support an in-place upgrade for any InForm 4.6, 5.0, or 5.5 release.

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

- **Migrate the InForm Portal software**—Use to upgrade or migrate the InForm Portal software to the InForm 6.1.1.1 release.

  For more information, see *Upgrading and migrating the InForm Portal software* (on page 47).

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

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

  For more information, see *Upgrading and migrating the reporting environment* (on page 53).

Requirements for the InForm studies you can migrate

You can upgrade or migrate to the InForm 6.1.1.1 release from the InForm 4.6 SP2 release or later, or from any InForm 5.0, 5.5, 6.0, or 6.1 release.

If you are upgrading or migrating from any InForm 5.0, 5.5, 6.0, or 6.1 release, the Central Designer project for each study must be updated to the Central Designer 2.1.2 release. A new automated deployment must be sent to the InForm application to update each study. For more information, see ***Create the Central Designer study deployment*** (on page 25), and the Central Designer *InForm Design Guide*. Other than updating the Central Designer project, there are no limitations on upgrading or migrating studies from any InForm 5.0, 5.5, 6.0, or 6.1 release.

You can only migrate InForm 4.6 studies that meet the following criteria.

- The study is deployed in the InForm 4.6 SP2 release or later.
- The study must be deployed in the English (en-US) language.

  The Study Version in the Central Designer application indicates the study language.

You cannot migrate studies to the InForm 6.1.1.1 release that:

- Use synchronization.
- Were deployed in any of the following InForm releases, even if they were updated to the InForm 4.6 SP2 release:
  - InForm 4.0
  - InForm 4.1
  - InForm 4.5 prior to the InForm 4.5 SP3b release.

Hardware and software requirements for the InForm 6.1.1.1 release

Before upgrading and migrating to the InForm 6.1.1.1 release, review the hardware and software requirements in the *Release Notes*.

CHAPTER 2

Upgrading the database environment

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Overview of upgrading the database environment

If you are upgrading to the InForm 6.1.1.1 release from an environment that uses the Oracle 10g database software, you must upgrade to the Oracle 11g or the Oracle 12c database software.

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

Note: Oracle does not support an in-place upgrade from the Oracle 10g database to the Oracle 11g or the Oracle 12c database software; or from the Oracle 11g database to the Oracle 12c database software. You must export studies from your existing environment and import them into the upgraded database environment, and then proceed with the rest of the upgrade.

Upgrade to a new Oracle database environment

1. Create a new Oracle 11.2 or Oracle 12.1 database environment.
2. Create new study databases in the new Oracle 11.2 or Oracle 12.1 environment.

   For more information, see your Oracle database documentation.

CHAPTER 3

Upgrading and migrating the InForm studies

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Preparing to upgrade or migrate the InForm software and studies

To prepare to migrate the InForm studies:

1 Review the following topics:

- *Database and file customizations* (on page 11).
- *Character set differences* (on page 11).
- *Query length limitations* (on page 12).
- *Oracle database import recommendations* (on page 12).
- *Rights assigned to right groups* (on page 13).
- *Itemset types and migrated studies* (on page 13).
- *Imported child controls and migrated studies* (on page 13).
- *Changed resource files* (on page 14).

2 *Create backup files* (on page 20).

3 Back up the InForm study database:

- *Uninstall the Reporting schema* (on page 21).

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

- *Back up the InForm study database—Oracle 10g* (on page 21).
- *Back up the InForm study database—Oracle 11g and Oracle 12g* (on page 22).

4 *Validate InForm 4.6 study elements* (on page 23)

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

5 *Export and modify the InForm study database* (on page 23).

6 *Create the Central Designer study deployment* (on page 25).

Considerations before you migrate

Database and file customizations

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

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

- Any schema customization must have an upgrade path that results in a valid InForm 6.1.1.1 schema at the point in the migration where you create the review schema. For more information, see *Import the InForm study DMP file* (on page 28).

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

  - Views
  - Functions
  - Procedures
  - Packages
  - Triggers

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

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

  The customized changes must be modified to comply with the InForm 6.1.1.1 software and InForm 6.1.1.1 MedML schema and reinstalled so that the customized changes are not lost due to the upgrade.

Character set differences

Character set differences between the InForm 4.6 release and the InForm 6.1.1.1 release might cause issues with table column widths, which, if not fixed, can result in data being truncated.

- For standard InForm database tables, running the **ExportMigrationFiles.cmd** automatically fixes any column width differences. You run this command when you *Export and modify the InForm study database* (on page 23).
- For customized database tables, you must manually increase the table column widths to accommodate the increase in Unicode character width before you run the **ExportMigrationFiles.cmd**.

Query length limitations

If you are migrating a study from an InForm 4.6 release, you need to review the query lengths.

If a query includes Latin-1 characters and is close to the query text size limit (4000 bytes), the query may exceed the size limit after the Latin-1 characters are converted to UTF-8 characters during the migration to the InForm 6.1.1.1 release.

If the query size exceeds the field limit, the query will be truncated.

Contact Oracle Global Support if you find any queries that have been truncated during the migration.

Oracle database import recommendations

Oracle recommends the following when importing previously exported studies into an Oracle 11g or an Oracle 12c database.

- Use single-user imports for importing study data into the new Oracle database.

  Note: Do not import streams metadata from an Oracle 10g database to an Oracle 11g or an Oracle 12c database.

  Before you import the study into the study database, set the Oracle database import parameters **STREAMS_CONFIGURATION** and **STREAMS_INSTANTIATION** to **N**.

- Do not import the **STRMADMIN user** and **STRMADMIN proxy user** into the Oracle 11g or the Oracle 12c database.

- Set **grants=N** for the import.

  If you set grants=Y, grants to the streams proxy user from the Oracle 10g database may be attempted, but might not work, causing error messages to appear during the import.

- If you are using the Data Pump export and import utilities (**expdp** and **impdp**), apply the **EXCLUDE=OBJECT_GRANT** parameter when importing study data into the new Oracle database.

  Note: If you are importing study databases that were used in an environment that includes the InForm Adapter application, you might encounter **Oracle error 31167: XML nodes over 64K in size cannot be inserted**. You can ignore this error.

  Note: If an export was done for a study schema that contained the Reporting and Analysis module installed in the same database as the study, messages might appear saying that the database tables contain a ROWID column, and that values might be obsolete. You can ignore these messages. The messages are related to the materialized views that are being imported. The reporting upgrade script you run later removes the materialized views that were imported.

  Note: If an export was done for a study schema that contained the Reporting and Analysis module installed in a different database from the study, an error message might appear saying that the system could not create a database link. You can ignore this message. This database link is not necessary for the study. If it exists after import, it is removed by the reporting upgrade scripts that you run later.

Rights assigned to right groups

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

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

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

For more information, see *Verify the rights assigned to each rights group* (on page 46).

Itemset types and migrated studies

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

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

Itemsets created in releases prior to the InForm 6.0 release behave as Add Entry itemsets in the InForm 6.1.1.1 release.

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

Imported child controls and migrated studies

In the InForm 6.1.1.1 release, the InForm Data Import utility does not allow the import of dynamic child controls when the parent is not selected.

In releases prior to the InForm 6.0 release, you could use the InForm Data Import utility to import child controls when the parent control was not selected. As a result, if you migrate a study with imported child control data into the InForm 6.1.1.1 release, when a form loads, the dynamic control functionality correctly hides child controls with unselected parent controls, but it does not clear the data in the child controls.

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

Changed resource files

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

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

Files updated in the InForm 6.1.1.1 release

...\XMLBase

sysVolume.xml

...\XMLBase\Help

Version.htm

Files updated in the InForm 6.1.1 release

Files updated in the InForm 6.1.1 release

...\Resources\enu

HomeFrameset.html

TopFrameset.html

formhelper.js

ReauthenticationWindow.html

pfscript.js

ContextMenuFrame.html

Reauth.html

MonitorFrame.html

ControlPanelNoFrame.html

mainstyles.css

resources_template.xml

Reauth_Frameset.htm

...\XMLBase

UpgradeTrialResources.rsp

core_SystemConfig.xml

core_Rights.xml

core_SystemConfigThing.xml

sysform_AdminUserNew.xml

sysform_SystemConfig.xml

sysVolume.xml

sysform_SystemInfo.xml

sysform_RightsEdit.xml

sysform_Rule.xml

...\XMLBase\Help

Version.htmtmpl

Version.htm

New files in the InForm 6.1.1 release

...\Resources\enu

AlertsFrame.html

Files updated in the InForm 6.1.0.2 release

...\Resources

formhelper.js

pfscript.js

MonitorFrame.html

...\XMLBase

sysVolume.xml

...\XMLBase\Help

Version.htm

Files updated in the InForm 6.1.0.1 release

...\XMLBase

sysVolume.xml

...\XMLBase\Help

Version.htm

Files updated in the InForm 6.1 release

...\Resources\enu

calendar.js

ContextMenu.html

ControlPanelNoFrame.html

CRBViewFrame.html

CRBViewTitle2NoFrame.html

CRBViewTitleNoFrame.html

CRFFrame.html

DocTabControl.html

EQACFrame.html

EQACFrameset.html

EQACQueryFrame.html

ExternalLoginWindowClose.html

FORGOTPWD.HTML

GenericTitle.html

Login.html

mainstyles.css

MonitorFrame.html

MONITORTITLE.HTML

MultiPage.html

pfscript.js

QueryListTitle2NoFrame.html

resetpwdnotification.txt

resources_template.xml

ScreeningLogTitle.html

SETitle.html

signingtitle.html

TabControl.html

TabControlframe.html

TEViewTitleNoFrame.html

Top_Reauth.js

TopFrameset.html

UserAdminTitle.html

VisitBar.css

visitbar.html

visitsidebar.html

XferViewTitle2NoFrame.html

...\Resources\enu\Templates

PDFPage.xsl

...\XMLBase

core_AdminDBTrl.XML

core_GroupTypes.xml

core_Rights.xml

core_RightsGroups.xml

core_SystemConfig.xml

core_SystemConfigThing.xml

core_Users.xml

core_UserType.xml

default_RightsGroups.xml

QueryFormText.xml

syscore.rsp

sysform_AdminDBTrl.XML

sysform_AdminUserNew.xml

sysform_GroupEditProp.xml

sysform_GroupType.xml

sysform_ItemsetRowComment.xml

sysform_Password.xml

sysform_RightsEdit.xml

sysform_Rule.xml

sysform_Site.xml

sysform_SystemConfig.xml

sysform_SystemInfo.xml

sysform_UserType.xml

sysVolume.xml

sysVolume.xmltmpl

UpgradeTrialResources.rsp

...\XMLBase\Help

Version.htm

New files in the InForm 6.1 release

...\Resources\enu

emailchangenotification.txt

RESETPWD.HTML

RESETPWDMSG.HTML

resetpwdreminder.txt

...\XMLBase

core_autocalc_User.xml

Files removed in the InForm 6.1 release

...\Resources\enu

builder.js

controls.js

dragdrop.js

effects.js

FORGOTPWDCORRECT.HTML

motionpack.js

prototype.js

scriptaculous.js

slider.js

...\XMLBase

core_Listings.xml

core_Randomization.xml

sysform_AdvancedConnectionSettings.xml

sysform_ConnectionSettings.xml

sysform_DefaultAdvancedConnectionSettings.xml

sysform_DefaultConnectionSettings.xml

sysform_EventAdd.xml

sysform_Listings.xml

UAUM_Users.xml

Create backup files

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

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

2 Back up all customized screens, images, reports, and database scripts, such as views, so they can be reapplied after the upgrade.

Also, back up any other files you might have created or copied to the InForm folder tree, including files in the **InForm\Trials** folder.

Examples:

- Changes to reason drop-down lists on CRF detail pages.
- Logo files and other images.

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

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

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

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

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

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

You will use the information exported to **backupkeys.txt** to set registry entries on the InForm 6.1.1.1 application server.

For more information, see *Make updates to the Windows registry settings* (on page 28).

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

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

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

5 Back up all of the files for each study.

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

6 If the CIS software is installed on the InForm application server, you must uninstall it.

Use the **Control Panel > Add/Remove Programs** option to remove the CIS software.

Back up the InForm study database

Uninstall the Reporting schema

- If your InForm 4.6 study has reporting installed, run **deinstall_reporting_diffdb.sql** and **remove_streams_setup_info_diffdb.sql** to remove the reporting objects in the study schema.

  Note: If you are using a single database for your study and reporting, run only **deinstall_reporting_samedb.sql** to remove the reporting objects.

For more information, see *Remove the streams between the InForm study schema and the Reporting schema, and uninstall the Reporting schema* (on page 60).

Back up the InForm study database—Oracle 10g

If you are migrating an InForm 4.6 or InForm 5.0 study from an Oracle 10g database, backing up the InForm study database is required. You will import the DMP file you create in this step during the migration to the InForm 6.1.1.1 release. For more information, see *Import the InForm study DMP file* (on page 28).

To back up an InForm 4.6 or InForm 5.0 study database to a DMP file:

1 Copy the InForm\InstallSupport folder from the downloaded ISO image to the InForm application server.

2 Run **ExportDBUpgrade.cmd** (located in the InForm\InstallSupport folder) on the InForm application server to back up each InForm study database as a DMP file, using the following syntax:

```
ExportDBUpgrade.cmd <DMP_file> <TNS_Service_Name>
```

where:

- **DMP_file**—Name of the DMP file, using the full path.

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

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

You are prompted for the following values:

- trial_user=Owner of the InForm study database schema.
- trial_user_password=Password for the owner of the InForm 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.

Example:

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

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

Back up the InForm study database—Oracle 11g and Oracle 12c

If you are migrating an InForm 4.6, 5.5, 6.0, or 6.1 study from an Oracle 11g or Oracle 12c database, backing up the InForm study database is required. You will import the DMP file you create in this step during the migration to the InForm 6.1.1.1 release. For more information, see *Import the InForm study DMP file* (on page 28).

To back up an InForm 4.6, 5.5, 6.0, or 6.1 study database to a DMP file:

1 Copy the InForm\InstallSupport folder from the downloaded image to the InForm database server.

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

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

where:

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

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

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

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

You are prompted for the following values:

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

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

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

For example:

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

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

Validate InForm 4.6 study elements

InForm 4.6 studies may include custom elements which may conflict with InForm core elements in later InForm releases. These conflicts will cause a deployment failure during the migration due to an Element already exists - elements cannot be changed error.

To avoid deployment errors when you migrate an InForm 4.6 study to InForm 6.1.1.1 you must validate the InForm 4.6 study objects:

1 Copy the InForm\InstallSupport folder from the downloaded product image to the InForm application server.

2 Run the **DetectReservedElements.cmd** command (located in the InForm\InstallSupport folder on the InForm application server) using the following syntax:

```
DetectReservedElements <TNS_Service_Name>
```

where:

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

You are prompted for the following values:

- **trial user ID**=Owner of the InForm study database schema.
- **trial user password**=Password for the owner of the InForm study database schema.

The DetectReservedElements command creates a **reserved_element_strings.txt** file (located in the InForm\InstallSupport folder) that lists all the elements in the InForm 4.6 study that conflict with core elements in the InForm 6.1.1.1 study.

If the script identifies element conflicts, contact Oracle Global Support before you migrate to the InForm 6.1.1.1 release.

Export and modify the InForm study database

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

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

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

To export and modify the InForm study database:

1 Copy the InForm\InstallSupport folder from the downloaded product image to the InForm application server.

2 Run **ExportMigrationFiles.cmd** (located in the InForm\InstallSupport folder on the InForm application server) to back up each InForm study database as a DMP file, using the following syntax:

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

where:

TNS_Service_Name—TNS name for the database instance.

You are prompted for the following values:

- **Trial user ID**—Owner of the study database schema.
- **Trial user password**—Password for the owner of the study database schema.
- **Oracle system uid**—Oracle database system user.
- **Oracle system user password**—Password for the Oracle database system user.
- **Oracle sys uid**—Oracle database sys user.
- **Oracle sys password**—Password for the Oracle database sys user.
- **Dump file directory path**—Location of the directory where you created the dump file:
  - For an Oracle 9i or 10g, the InForm server.
  - For an Oracle 11g database, the InForm database server.

  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.

- **Dump file name**—Name of the DMP file to export.

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

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

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

Note: If error messages indicating that the system cannot find the paths specified for the System Product Locale and the System Study Locale appear, disregard the messages and continue with the migration.

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.

Create the Central Designer study deployment

The InForm 6.1.1.1 software requires a new Central Designer 2.1.2 rules engine. If you are upgrading or migrating to the InForm 6.1.1.1 release, the Central Designer project for each study must be updated to the Central Designer 2.1.2 release. A new automated deployment must be sent to the InForm application to update each study.

The purpose of this new study deployment is to upgrade the InForm study to use the latest rule engine. The new deployment package must be identical to what has already been deployed to the InForm study. Do not introduce any changes in this deployment.

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

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

Migrating InForm studies to a new machine

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

- Oracle does not support an in-place upgrade for any InForm 4.6, 5.0, or 5.5 release.
- For InForm 6.0 or 6.1 releases, you can migrate to a new machine or you can perform an in-place upgrade.

  For more information, see *Running an in-place upgrade* (on page 36).

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

1 *Install and configure the InForm 6.1.1.1 software* (on page 27).
2 *Copy the backup files to the InForm 6.1.1.1 application server* (on page 27).
3 *Make updates to the Windows registry settings* (on page 28).
4 *Create tablespaces other than INFORM* (on page 28).
5 *Import the InForm study DMP file* (on page 28).
6 *Set the locale for InForm 4.6 sites and users* (on page 30).

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

7 *Set up InForm customer-defined databases* (on page 31).
8 *Set up a randomization source for a study* (on page 32).
9 *Install the Central Designer certificate* (on page 34).
10 *Perform the final study configuration* (on page 34).
11 *Install or upgrade the InForm Adapter software* (on page 34).
12 *Enable browser compatibility mode for the study* (on page 35).
13 *Start the InForm studies* (on page 35).
14 *Set the password for the system user* (on page 35).
15 *Install the Central Designer deployment package* (on page 35).

Install and configure the InForm 6.1.1.1 software

Note: Before you install the InForm 6.1.1.1 software, make sure your environment meets the requirements for this release. For more information, see the *Release Notes*.

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

  On the Database Configuration page:

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

For more information, see the *Installation Guide*.

Copy the backup files to the InForm 6.1.1.1 application server

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

  For more information, see *Create backup files* (on page 20).
- Copy any non-InForm tablespaces to the database server.

  For more information, see *Database and file customizations* (on page 11).
- Copy **key.txt** to the <*InstallationDirectory*>\InForm\Bin\DBOra folder.

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

  Note: This step is required only if you are upgrading from any InForm 6.0 or 6.1 release.
- Copy the **backupkeys.txt** file you created when you exported the InForm registry settings so you can update the registry as needed on the InForm 6.1.1.1 application server.

  For more information, see *Make updates to the Windows registry settings* (on page 28).

Make updates to the Windows registry settings

If you have any InForm Windows registry setting customizations that you need to apply to the InForm 6.1.1.1 software, you need to update the Windows registry on the InForm 6.1.1.1 application server.

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

For more information, see *About registry key migration* (on page 76).

To evaluate what changes you should make:

1 Open **backupkeys.txt** in a text editor, such as Notepad.

2 Open the Registry Editor (regedit) to edit the Windows registry.

3 Compare the entries for each entry in **backupkeys.txt** to the entries in the InForm 6.1.1.1 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 InForm study DMP file

To import the InForm study DMP file:

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

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

  where:

  TNS_Service_Name—TNS name for the database instance.

  You are prompted for the following values:

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

- **Oracle system user password**—Password for the Oracle database system user.
- **Oracle sys uid**—Oracle database sys user.
- **Oracle sys password**—Password for the Oracle database sys user.
- **InForm database administrator name**—The name for the InForm database administrator.
- **InForm database administrator password**—The password for the InForm database administrator.
- **Dump file directory path**—Location of the directory where you created the dump file:
  - For an Oracle 9i or 10g, the InForm server.
  - For an Oracle 11g database, the InForm database server.

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

  Note: By default, Live and UAT studies require study approval.
- **Deployment backup folder**—Enter a path on the InForm database server that will be used for database recovery during study deployment. For example /u01/app/deploybackup.

  Note: The folder must exist before you run the ImportMigrationFiles command.
- **Deployment service port**—Enter a port number for the Central Designer application to communicate with the InForm application server to transmit deployment packages.
- **Authentication service port**—Enter a port number for the InForm application server to authenticate users for the Reporting and Analysis module.
- **ODMSubmit service port**—Enter a port number for the Clinical Data API to exchange SOAP requests.

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

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

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

For more information, see *Set the locale for InForm 4.6 sites and users* (on page 30).

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 the locale for InForm 4.6 sites and users

Note: This step is required only when you migrate InForm 4.6 studies to the InForm 6.1.1.1 release.

InForm 5.0, 5.5, 6.0, and 6.1 studies have locale attributes associated with sites and users, but InForm 4.6 studies do not. When you migrate studies from the InForm 4.6 release to the InForm 6.1.1.1 release, these properties must be added to existing sites and users.

1 Open the **UpgradeSitesAndUsers.xml** file you created when you ran ImportMigrationFiles.cmd, and check the site MedML definitions for warnings on the TIMEZONE attribute.

   If the Time Zone specified for a site in the InForm 4.6 study does not match the time zones defined for the operating system on the InForm application server, the MedML for the given site contains a warning for the TIMEZONE attribute along with the original Time Zone.

2 If a warning appears, change the TIMEZONE attribute to a valid Time Zone key name in the InForm server registry before proceeding to the next step.

   Time Zones are located at **HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows NT\CurrentVersion\Time Zones** in the registry.

3 Ensure the XML file is well formed after the changes.

4 Run **UpgradeSitesAndUsers.cmd** (located in the <*InstallationDirectory*>\InForm\Bin\DBOra folder) to install UpgradeSitesAndUsers.xml, using the following syntax:

   ```
   UpgradeSitesAndUsers.cmd <TrialName>
   ```

   where:

   - **TrialName**—The name of the study being migrated.

   For example, run the following command to upgrade study PFST46:

   ```
   UpgradeSitesAndUsers.cmd PFST46
   ```

   The UpgradeSitesAndUsers command sets the product locale and study locale of all users except the system user to en-US. Similarly, all sites have site locale set to en-US and the User Name Order property set to **F** (given name), **L** (surname).

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

Set up InForm customer-defined databases

1 To set up the customer-defined databases using the NoSchema option, use the following command and syntax:

```
pfadmin setup CDD <RefName> <studyname> /db <oracle_connect_string> <DSN>
[NoSchema]
```

where:

- **RefName**—RefName of the CDD.
- **studyname**—Name of the study you are defining.
- **oracle_connect_string**—String that the InForm server uses to connect to the Oracle Instance for the study.
- **DSN**—Data Source Name of the CDD.
- **[NoSchema]**—Indicates that no new CDD schema should be created during setup.

You are prompted for the following values:

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

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

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

2 Set the locale to use for the unit symbol translation stored in the CDD unit symbol column.

```
pfadmin config cdd <studyname> <study_dsn> <study_locale>
```

3 Make the CDD functionality transactional.

```
pfadmin config cdd <studyname> <study_dsn> active
```

4 Enable the CDD functionality.

```
pfadmin config cdd <studyname> enable
```

Set up a randomization source for a study

Do one of the following:

- *Activate a Microsoft Access randomization source* (on page 32).
- *Migrate a randomization source to an Oracle database* (on page 32).

Activate a Microsoft Access randomization source

To set up a Microsoft Access randomization source:

1 Migrate the Access randomization source database to the InForm application server.

2 Activate the randomization rule in the InForm application.

3 Run the following command:

```
pfadmin config trial <trialname> /Rnd "<path_to_randomization_database>"
```

4 Restart the study.

Migrate a 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.

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

- Store the randomization tables in the existing study database.

  For more information, *Migrating the randomization source to the study database* (on page 33).

- Store the randomization tables in a new randomization source database.

  For more information, *Migrating the randomization source to a new database* (on page 33).

Migrating the randomization source to the study database

1 To migrate trial randomization to the InForm study database, use the following syntax:

```
RandomizationMigration.exe <trialname> /UseTrialSchema /prompt <outfile>
```

where:

- *trialname*—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.

When prompted, enter the following parameters:

- OracleSysUID—The name of the Oracle system user.
- OracleSysPID—The password for the Oracle system user.

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.

2 Restart the trial after the migration is complete.

Migrating the randomization source to a new database

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

```
RandomizationMigration.exe <trialname> /NewRNDSchema <dbserver> /prompt
<outfile>
```

where:

- *trialname*—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.

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 system user.
- OracleSysPID—The password for the Oracle system user.
- 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.

2 Restart the trial after the migration is complete.

Install the Central Designer certificate

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

1 Copy the certificate you retrieve from the Central Designer application to a folder on the 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.

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

2 Reapply any customizations.

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

Install or upgrade the InForm Adapter software

Perform this step if you are currently using, or plan to start using, the InForm application with products that require the InForm Adapter software.

To install or upgrade the InForm Adapter software, refer to the InForm Adapter *Installation and Configuration Guide* and the InForm Adapter *Release Notes*.

For information about release compatibility, see the *Release Notes*.

Note: The InForm Adapter software and the InForm Server Adapter software, as well as the documentation images, are available from the Download Center.

Enable browser compatibility mode for the study

To configure the InForm application server to run in browser compatibility mode:

- Run the **SetCompatMode.cmd** (located in the <*InstallationDirectory*>\InForm\Bin folder on the InForm application server using the following syntax:

  SetCompatMode.cmd <*study_name***>**

Note: This step is required only when upgrading from any InForm 6.1.0.x release. The browser compatibility mode will already be enabled if you are upgrading from the InForm 6.1.1 release.

Start the 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***>**

Install the Central Designer deployment package

- For each study, download and install the Central Designer deployment package on the InForm application server.

  Note: This step is required only when upgrading from any InForm 6.1.0.x release. This step will already be complete if you are upgrading from the InForm 6.1.1 release.

  If you use the package installer (pkginst.exe) to install a Central Designer 2.1.2 deployment package to your study instead of using an automated deployment, run the following command:

  pfadmin updateworkflow <*studyname***>**

  Note: You only need to run the pfadmin updateworkflow command the first time you install a deployment package for a study.

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

Running an in-place upgrade

You can run an in-place upgrade for any InForm 6.0 or 6.1 release.

1 *Upgrade the Central Designer rules engine* (on page 37).

2 *Back up the InForm study and admin databases and files for the in-place upgrade* (on page 37).

3 Update the InForm application server software.

4 *Update the database parameters* (on page 40).

5 *Deploy the SQL profiles* (on page 40).

6 *Run the in-place upgrade* (on page 41).

7 *Set the InForm 6.1 study properties* (on page 42).

8 *Enable network access rights for automated deployments on the InForm application server* (on page 43).

9 *Enable browser compatibility mode for the study* (on page 43).

10 *Start the InForm study and server* (on page 43).

11 *Create new database objects for the review schema* (on page 44).

12 *Install the Central Designer deployment package for each upgraded study* (on page 45).

13 *Upgrade all integration applications* (on page 45).

If the in-place upgrade fails for any reason, use the backup files you created in Step 2 to restore your InForm 6.0 or 6.1 environment. For more information, see *Restore an InForm 6.0 or 6.1 release* (on page 80).

Upgrade the Central Designer rules engine

1 Copy the InForm folder from the Central Designer image to the InForm application server.

2 Run **InstallCentralDesignerFiles.cmd**, located in the Central Designer image InForm folder.

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

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

Back up the 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 InForm service, for example, the Central Coding application.

3 Stop the InForm service.

4 To back up the InForm 6.0 or 6.1 study 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.
- **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 6.0 or 6.1 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 InForm admin database schema owner.
- **admin_user_pass**—Password for the owner of the 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 pfst55.dmp
```

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

6 Export the current registry settings from all servers, including the InForm server and the Reporting and Analysis server in **HKEY_LOCAL_MACHINE\SOFTWARE\OracleHS**.

7 Duplicate and rename the OracleHS folder.

For example, **E:\OracleHS** to **E\OracleHS-60**.

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

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

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

9 For each 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 InForm application server software

Before you run the in-place upgrade for the InForm 6.1.1.1 software, you must update the application server to meet the software requirements listed in the *Release Notes*.

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

```
pfadmin stop trial <studyname>

pfadmin stop server <servername>
```

2 Reboot the InForm application server.

3 Upgrade the software components as required by the *Release Notes*, including:

- .NET 4.6
- Microsoft Visual C++ 2013 Redistributable (64-bit).

Note: This step is required only when upgrading from any InForm 6.1.0.x release. The components will already be updated if you are upgrading from the InForm 6.1.1 release.

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 InForm application server:

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

5 Reboot the InForm application server.

Update 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 create a SQL Profile, a user must have the following privileges:

- ADVISOR role
- CREATE ANY SQL PROFILE PRIVILEGE
- ALTER ANY SQL PROFILE PRIVILEGE
- DROP ANY SQL PROFILE PRIVILEGE
- EXECUTE PRIVILEGE ON DBMS_SQLTUNE

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.

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

1 Navigate to the folder where you extracted the contents of the ISO file, and run the **setup.exe** file located in the InFormUpgrade folder.

The installation wizard opens.

2 Click **Next**.

The Oracle System and Sys user information screen appears.

Enter the following information:

- Name of the Oracle database system user.
- Password for the Oracle database system user.
- Name of the Oracle database Sys user.
- Password for the Oracle database Sys user.

3 Click **Next** to start the upgrade program.

Running the in-place upgrade wizard upgrades the core InForm software and installs the **Op package and reports 6_1_1_1.zip** file that you use to upgrade the reporting environment.

For more information, see *Running an in-place upgrade of an InForm 6.1 reporting environment* (on page 74).

4 When the upgrade completes, click **Finish**.

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*** (on page 37) to restore your InForm 6.0 or 6.1 environment. For more information, see ***Restore an InForm 6.0 or 6.1 release*** (on page 80).

Set the InForm 6.1 study properties

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

Use the pfadmin command to set the following properties for each study:

- **TrialType**—The study type. The TrialType options are:
  - Live
  - UAT
  - QA
  - TRN
  - Dev
- **TrialApproval**—True if your study requires approval from the Central Designer application in order to accept an automated deployment, False if no approval is required.
- **DeployBackupFolder**—The path to a folder on the database server used during the automated deployment process.

  The folder must exist on the database server, otherwise the deployment will fail.
- **DeploymentService**—The port number used to communicate with the Central Designer application for automated deployments.
- **AuthService**—The port number used to communicate with the Reporting and Analysis module to authorize InForm and reporting users.
- **ODMSubmitService**—The port number used to communicate with requests to the Clinical Data API.

To set these properties, use the following syntax:

```
pfadmin config trial <studyname> /<propertyname> <propertyvalue>
```

For example, to configure these properties for pfst61, use the following commands:

```
pfadmin config trial pfst61 /TrialType QA
pfadmin config trial pfst61 /TrialApproval FALSE
pfadmin config trial pfst61 /DeployBackupFolder /u01/app/dbbackup
pfadmin config webservice pfst61 DeploymentService ADD HTTP:14040
pfadmin config webservice pfst61 AuthService ADD HTTP:14041
pfadmin config webservice pfst61 ODMSubmitService ADD HTTP:14042
```

Enable network access rights for automated study deployments on the 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**.

Enable browser compatibility mode for the study

To configure the InForm application server to run in browser compatibility mode:

- Run the **SetCompatMode.cmd** (located in the <*InstallationDirectory*>\InForm\Bin folder on the InForm application server using the following syntax:

  `SetCompatMode.cmd <study_name>`

Note: This step is required only when upgrading from any InForm 6.1.0.x release. The browser compatibility mode will already be enabled if you are upgrading from the InForm 6.1.1 release.

Start the InForm study and server

1 Re-boot the InForm application server.

2 Start the 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>`

Create new database objects for the review schema

Before you create the new database objects for the review schema, see *Database and file customizations* (on page 11).

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

- 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.

Install the Central Designer deployment package for each upgraded study

- For each study, download and install the Central Designer deployment package on the InForm application server.

  Note: This step is required only when upgrading from any InForm 6.1.0.x release. This step will already be complete if you are upgrading from the InForm 6.1.1 release.

  If you use the package installer (pkginst.exe) to install a Central Designer 2.1.2 deployment package to your study instead of using an automated deployment, run the following command:

  ```
  pfadmin updateworkflow <studyname>
  ```

  Note: You only need to run the pfadmin updateworkflow command the first time you install a deployment package for a study.

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

Upgrade all integration applications

Upgrade all integrations, such as the InForm Adapter and Central Coding applications, that are associated with the upgraded study.

Post-upgrade tasks

Clear the client-side browser caches

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

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

Verify the rights assigned to each rights group

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

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

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

   This information is on the Rights Group detail page in the Admin user interface. For more information, see ***Rights assigned to right groups*** (on page 13) and the *User Guide*.

2 Update the rights for each rights group, as needed.

CHAPTER 4

Upgrading and migrating the InForm Portal software

In this chapter

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Migrating to a new environment....49
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Overview of upgrading and migrating the InForm Portal database

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

Note: The InForm Portal users and rights have been changed in the InForm 6.1 release. As a result, the Portal Admin and Portal Config Admin users are no longer available. Before you upgrade the InForm Portal database, record the rights that these users were granted so that you can reassign them to new users. For more information, see ***Assign portal rights to existing rights groups*** (on page 51).

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

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

1 *Export the InForm Portal database* (on page 49).

2 *Import the InForm Portal DMP file* (on page 50).

3 *Assign portal rights to existing rights groups* (on page 51).

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

1 *Upgrade the InForm Portal database in an existing environment* (on page 52).

2 *Assign portal rights to existing rights groups* (on page 51).

Migrating to a new environment

Export the InForm Portal database

To export the InForm Portal database to a DMP file:

1 Copy the InForm\InstallSupport folder from the downloaded product image to the InForm application server.

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

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

where:

TNS_Service_Name—TNS name for the database instance.

You are prompted for the following values:

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

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

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

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

The ExportPortalMigrationFiles command creates the following file:

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

Import the InForm Portal DMP file

To import the InForm Portal DMP file, run **ImportPortalMigrationFiles.cmd** (located in the <*InstallationDirectory*>\InForm\Bin\DBOra folder on the InForm application server), using the following syntax:

```
ImportPortalMigrationFiles.cmd <TNS_Service_Name>
<Portal_TNS_Service_Name>
```

where:

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

You are prompted for the following values:

- **Oracle system UID**—Oracle database system user.
- **Oracle system user password**—Password for the Oracle database system user.
- **Oracle sys UID**—Oracle database sys user.
- **Oracle sys user password**—Password for the Oracle database sys user.
- **Oracle data folder path**—The path to the Oracle database data folder. For example:

  /u01/app/oracle/oradata
- **Trial UID**—Owner of the study database schema.
- **Trial user password**—Password for the owner of the study database schema.
- **portal_user**—Owner of the InForm Portal database schema.
- **portal_user_pass**—Password for the owner of the InForm Portal database schema.
- **inform_trial_name**—Name of the <if> study where the portal application from the DMP file is imported.
- **pfdbauid**—InForm service database admin user.
- **pfdbapid**—Password for the InForm service database admin user.
- **Dump file directory path**—Location of the directory where you created the dump file:
  - For an Oracle 9i or 10g, the InForm application server.
  - For an Oracle 11g database, the InForm database server.

  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.
- **Dump file name**—Name of the DMP file to export.
- **Was dump file created with exp?**—Enter N if the dump file was created from Oracle database 11 or later. Otherwise, enter Y.

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

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

The **ImportPortalMigrationFiles.cmd** command imports the portal DMP file and upgrades it. It also migrates the information from the InForm Portal database to the InForm study database.

Assign portal rights to existing rights groups

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

The InForm Portal users and rights were changed in the InForm 6.1 release. As a result, the Portal Admin and Portal Config Admin users are no longer available in the InForm 6.1.1.1 release. Before you upgrade the InForm Portal database, record the rights that these users were granted so that you can reassign them to new users.

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

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

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

For more information, see the *User Guide*.

Upgrading in the same environment

Upgrade the InForm Portal database in an existing environment

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

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

```
UpgradeInFormPortal <InForm_TNS_Name> <Portal_TNS_Name> <Study_Name>
```

where:

InForm_TNS_Name—TNS name for the InForm database instance.

Portal_TNS_Name—TNS name for the InForm Portal database instance.

Study_Name—InForm study.

You are prompted for the following values:

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

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

2 *Assign portal rights to existing rights groups* (on page 51).

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

CHAPTER 5

Upgrading and migrating the reporting environment

In this chapter

Migrating the reporting environment to a new machine....54
Upgrading an existing InForm 6.1 reporting environment....68
Running an in-place upgrade of an InForm 6.1 reporting environment....74

Migrating the reporting environment to a new machine

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

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

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

1 *Install and configure the Cognos 10.2.2 environment* (on page 55).

   a *Install and customize the Cognos 10.2.2 software* (on page 55).

   b *Identify or create the required users for any InForm study* (on page 56).

2 *Create an export package and export the data from your Cognos environment* (on page 57).

   a Review *About the export package* (on page 57).

   b *Create an export package for each study in the Cognos environment* (on page 57).

   c *Copy the export package to the new Cognos server* (on page 59).

3 *Remove the streams between the InForm study schema and the Reporting schema, and uninstall the Reporting schema* (on page 60).

4 *Create the streams between the InForm study schema and the Reporting schema, and install the Reporting schema* (on page 61).

5 *Run the PFCognosConfig utility* (on page 61).

6 *Import the export package* (on page 61).

   - *Run the Reporting Import Utility* (on page 62).

7 *Modify the PFRSetupTrial.xml file* (on page 63).

8 *Run PFRInit on the InForm application server* (on page 64).

9 *Delete obsolete reports* (on page 64).

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

10 *Associate custom reports with the new operational packages* (on page 65).

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

11 *Restart the InForm Model Updater service* (on page 66).

12 *Revalidate custom reports* (on page 66).

13 *Update schedules and jobs* (on page 66).

14 *Delete the study organizational units from the LDAP configuration* (on page 67).

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

Install and configure the Cognos environment

Install and customize the Cognos 10.2.2 software

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

> **Note:** For information on how to install and customize the Cognos 10.2.2 software, see the ***Installation Guide.***

2 Install the Cognos hotsites in this order:

   a up_bisrvr_winx64h_10.2.6100.1032

   b up_bisrvr_winx64h_10.2.6100.1037

3 Install Fix Pack 1 (FP1) for the Cognos 10.2.2 software.

4 Install the following interim fix update:

   a up_bisrvr_winx64h_10.2.6102.502

5 Install the final hotsite:

   a up_bisrvr_winx64h_10.2.6104.1072

6 Customize the Cognos 10.2.2 software on the Cognos servers.

   a Run the Cognos 10 Customization for InForm wizard (CRNConfig) on all Report and Content Manager servers.

   b Run the Cognos 10 Gateway Customization for InForm wizard (CRNGatewayConfig) on all Gateway servers.

7 Start the Cognos 10 BI Reporting servers.

For more information, see the *Installation Guide*.

Identify or create the required users for any InForm study

Before you start the Cognos upgrade, make sure that the following users exist so that you can log in to the Cognos 10 BI Reporting server:

- A Cognos user who is a System Administrator.
- An InForm study user who is assigned to a rights group that includes the Reports right and is also a member of the Directory Administrators reporting group.
- An InForm study user (pfreportinguser) who is a member of the Sponsor Users and Publishers reporting group.

  The pfreportinguser will be used for the first time by the pfmodelupdater service. The pfmodelupdater service uses the pfreportinguser user name and password to generate the clinical model.
- If necessary, configure the pfreportinguser account.

  For more information, see the *Installation Guide*.
- Change the password for the pfreportinguser using both the user interface and the pfadmin command.
  - Log in to the InForm application and change the password for the pfreportinguser using the user interface.
  - Change the password for the pfreportinguser using the following command:

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

    When prompted, enter the password for the pfreportinguser.

  Note: Make sure that the password you enter through the user interface and the command line match.
- Reset the password for the Reporting CAP Admin database using the following command:

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

  When prompted, enter the password for the reportingcapadmin user.

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

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

About the export package

You must create reporting export packages for each InForm study being migrated to the InForm 6.1.1.1 release while your current InForm and Cognos environments are still active. The export packages contain:

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

You will import these packages into the Cognos 10 BI Reporting environment after you install the InForm 6.1.1.1 software and the Cognos 10 BI Reporting software.

Because the current Cognos environment remains intact until the Cognos 10 BI Reporting environment is active, there is no need to back up any files on the Cognos server except for the export packages.

Note: Because the current Cognos environment may remain intact while the Cognos 10 BI 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

For Cognos 8.2 or 8.4:

- For each InForm study, ensure that all users move the content in their **My Folders** area to the study folder in **Public Folders**.

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

For Cognos 10.2:

- You can include the content in a user's **My Folders** area if:
  - You create the report export package using Cognos 10.2.1 or later.
  - The export package contains content from a single study.

  Note: The owner of the **My Folders** area must exist in the InForm 6.1.1 study. Otherwise the My Folders content will not be ignored when the export package is migrated to the new environment.

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

1 Log in to an InForm study as a user who has the Reports right and is a member of the Directory Administrators reporting group.

2 Click **Reports**.

3 Select **Tools** > **Logon** to log in to the Cognos 8.2 server as a System Administrator.

4 In the **User** field, type the user name for the Cognos System Administrator user (for example, crnsysadmin).

5 In the **Password** field, type the password for the Cognos System Administrator user, and click **OK**.

6 For Cognos 8.2:

- Select **Tools** > **Content Administration**.

For Cognos 8.4 or 10.2:

a Select **Launch** > **Reporting Administration.**

b On the Configuration tab > **Content Administration.**

7 Click **New Export**.

The Export wizard appears.

8 Enter a name for the export package, and complete the fields on the **Description** page.

9 Click **Next**.

10 On the **Choose a deployment method** page, ensure that the **Select public folder and directory content** option is selected, and click **Next**.

11 On the **Select the public folders content** page, in the Public Folders content section, select the **trial folder,** the **operational package** (InForm Trial Management for <*trial_name*>), and the **clinical package** (<*trial_name*> Clinical).

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

If you are migrating from Cognos 10.2.1 or later, you can also add a user's **My Folders** content in the export package:

a Open the **trial folder**.

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.

12 Update the settings on each page for the export deployment package as listed in the following table.

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

Section	Option	Setting
Directory content	Include Cognos groups and roles	Deselected
	Include distribution lists and connections	Deselected
	Include data sources and connections	Deselected
General options page		
Access permissions	Include access permissions	Deselected
External namespaces	Do not include references to external namespaces	Selected
Entry ownership	Set the owner to	The user performing the import
	Apply to	New entries only

13 Click **Next**.

14 On the **Specify a deployment archive** page:

a Select the **Encrypt the content of archive** checkbox.

b Click **Set the Encryption password**.

c Enter a password for the archive, and click **OK**.

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*** (on page 62).

15 Click **Next**.

16 On the **Review the Summary** page, review the export details, and click **Next**.

17 On the **Select an action** page, select **Save and Run once**, and click **Finish**.

18 On the **Run with options** page, in the **Time** section, select **Now**, and click **Run**.

19 On the next page, after closing the dialog box, select **View the details of this export**, and click **OK**.

The View an export deployment record page appears, and displays the status of the export.

20 Click **Close**.

Copy the export package to the new Cognos server

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

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

Remove the streams between the InForm study schema and the Reporting schema, and uninstall the Reporting schema

Perform the following steps for every study on the InForm 4.6, 4.7, or 5.0 application server.

1 Run **deinstall_reporting_diffdb.sql**.

> **Note:** If you are using a single database for your study and reporting, run **deinstall_reporting_samedb.sql**.

This script uses the configdiffdb.sql file from the previous installation, so make sure the correct file is in place.

Run this script as many times as necessary, to remove each study.

a Open a Command Prompt window.

b Log in to SQL*Plus with /nolog.

c At the SQL*Plus prompt, type the following command:

```
@deinstall_reporting_diffdb.sql
```

d After you run the script, check for errors by searching for the word Error in the log file.

e Correct any problems and run the script again until it does not find anything to remove and does not find any errors.

2 Run **remove_streams_setup_info_diffdb.sql**.

> **Note:** If you are using a single database for your study and reporting, this step is not required.

This script removes the references of the study from the Streams_Setup_Info table.

a Open a Command Prompt window.

b Log in to SQL*Plus with /nolog.

c At the SQL*Plus prompt, type the following command:

```
@remove_streams_setup_info_diffdb.sql
```

d After you run the script, check for errors by searching for the word Error in the log file.

e Correct any problems and run the script again until it does not find anything to remove and does not find any errors.

Create the streams between the InForm study schema and the Reporting schema, and install the Reporting schema

Note: You only need to perform this step if your InForm study and the Reporting and Analysis module are installed in different database instances.

1 Configure **configdiffdb.sql**.

For more information, see the *Installation Guide*.

2 Re-apply any customizations.

a If you customized any files using the **streams_table_adds** variable, or by modifying **tabexcludelist.sql** or **tabincludelist.sql**, set the **streams_table_adds** variable in **configdiffdb.sql**.

If these tables already have a prefix of PF*, CT*, or RT*, they will automatically be replicated.

b To exclude tables with a prefix of PF*, CT*, or RT* from replication, set the **streams_table_exclude** variable in **configdiffdb.sql**.

3 Open a Command Prompt window.

4 Navigate to the folder in which the Reporting and Analysis software is located (for example, e:\InForm\Bin\DBOra\Reporting).

5 Run **configandcheckdiffdb**.

For more information, see the *Installation Guide*.

6 Run **install_reporting_diffdb** to install the reporting schema.

For more information, see the *Installation Guide*.

Run the PFCognosConfig utility

Run the PFCognosConfig utility (located in the <*InstallationDirectory*>\InForm\bin folder) on the InForm 6.1.1.1 application server to configure an InForm study to work with the Cognos 10 BI Reporting application. For more information, see the *Installation Guide*.

Import the export package

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

Use this command to migrate your export package into the InForm 6.1.1.1 environment.

Run the Reporting Import Utility

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

```
ImportUtility -all
```

When prompted, enter the:

- Cognos system administrator user namespace.
- User name for the Cognos system administrator.
- Cognos system administrator password.
- Internal URI that the InForm server uses to communicate with the Cognos 10 BI server.

  This Cognos 10 BI parameter is set in the InForm CRN wizard. The parameter setting is stored in the cogstartup.xml file and corresponds to the Reporting internal URI value on the System Configuration page in the InForm Admin user interface.
- Name of the deployment package containing the reporting content you want to import into the Reporting server.
- Password for the deployment package.
- The organization ID. 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:

- **sysadmin_namespace**—Oracle Directory Server admin namespace.
- **sysadmin_uid**—User name for the Oracle Directory Server admin namespace.
- **sysadmin_pass**—Password you chose when creating the Oracle Directory Server admin namespace user.
- **publisher_namespace**—Custom Authentication Provider (CAP) namespace.
- **publisher_uid**—InForm study user who is a member of the Publisher and Sponsor Users (or Site Users) Reporting groups.
- **publisher_pass**—Password of the InForm study user.
- **dispatcher_url**—Internal URI that the InForm server uses to communicate with the Cognos 10 BI server.
- **trial_name**—Name of the InForm study.
- **reportdb_pass**—Password for the reporting schema user.
- **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 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

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

- Run the DeleteObject command (located in the <*Installation_Directory*>\InForm\bin folder of that InForm application server using the following syntax:

  ```
  DeleteObject sysadmin_namespace=SysAdminNamespace
  sysadmin_uid=SysAdminUsername dispatcher_url=CognosDispatcherURI
  trial_name=studyName cognos_version=version_number
  ```

  Where:

  - **sysadmin_namespace**—Oracle Directory Server admin namespace.
  - **sysadmin_uid**—User name for the Cognos system administrator.
  - **dispatcher_url**—Internal URI that the InForm server uses to communicate with the Cognos 10 BI server.
  - **cognos_version**—The Cognos version you are migrating from.

  You are prompted for the following value:

  - **sysadmin_pid**—Password for the Cognos system administrator.

With the exception of the System Administration password and Trial user password parameters, you can pass parameters by using the *"path_to_parameter_file"* command option.

The DeleteObject command removes the following reports from the study folder:

- CRF Cycle Time Detail by User
- CRF Site Performance Summary by User
- CRF Aging by User
- CRB Completion and Query Summary by User
- Query Volume by Month by User
- Subject Enrollment Status by User

Associate custom reports with the new operational packages

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

1 Manually associate the custom reports developed in the InForm 4.6 application using the **InForm Trial Management for <***trialname***>** operational package with the new operational package in InForm 6.1.1.1 **<***studyname***> InForm Trial Management**.

For each report:

a Log in to an InForm study as a user who has the Reports right, and is a member of the Directory Administrators reporting group.

b Click **Reports**.

c Select **Log On > Log On** to log in to the Cognos 10 BI Reporting server as a System Administrator.

d In the **User** field, type the user name for the Cognos System Administrator user (for example, crnsysadmin).

e In the **Password** field, type the password for the Cognos System Administrator user, and click **OK**.

f Select **Actions > Set Properties**.

g In the **General** tab, click **Link to a Package**, and select the new **<***studyname***> InForm Trial Management** package.

h Click **OK**.

2 Delete the **InForm Trial Management for <***studyname***>** operational packages from the InForm 4.6 application.

Restart the InForm Model Updater service

1 Check the event log for the **InForm Model Updater** service to make sure the service is not generating the clinical model for an existing study.

- If the last entry in the event log is Finished Processing All Trials, proceed to step 2.
- If the last entry indicates that a clinical model generation is in progress, wait for the generation to finish before continuing to step 2.

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

Revalidate custom reports

1 Revalidate the custom reports and, if necessary, modify the reports for the new operational packages.

You revalidate the custom reports by running them and comparing the output to the expected output based on the previous release.

2 Revalidate all the custom clinical or ad hoc reports for the new clinical model in order to access all the enhancements in this release.

- If you have access to Report Studio, open the custom clinical report in Report Studio, validate, and save the report.
- If you do not have access to Report Studio, in the Cognos connection:
  a Navigate to **Set Properties** for a report, and click **Link to a package**.
  b Select the **<trial name> clinical package**, and click **OK.**

3 Run all the custom clinical reports, and compare the output to the expected output based on the previous release.

Update schedules and jobs

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

1 Select **Launch** > **Reporting Administration**.

2 In the **Status tab**, click **Schedules**.

3 Modify and save each listed schedule and job.

a Click the drop-down list next to the schedule name.

b Click **Modify the Schedule**.

c Make any modification (such as changing the start time by one minute), and click **OK**.

4 Ensure that study users copy their My Folders content from Public Folder to My Folders.

Delete the study organizational units from the LDAP configuration

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

LDAP is not used to authenticate study users in the InForm 6.1.1.1 release.

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

Upgrading an existing InForm 6.1 reporting environment

You can upgrade any InForm 6.1 reporting environment to the Cognos 10.2.2 release.

Before you begin the reporting upgrade, make sure that all the InForm studies in the Cognos environment have been upgraded to the InForm 6.1.1 release.

1 *Back up the content store database* (on page 69).

2 *Run a consistency check on the Content Store database* (on page 69).

3 *Clean the Cognos notifications database* (on page 69).

4 *Export the Content Store database* (on page 69).

   This step is required only if you are migrating from an Oracle 11g database to an Oracle 12c database.

5 *Back up customized files* (on page 70)

6 *Import Content Store and PFCAPAdmin user into the Oracle 12c instance* (on page 70).

   This step is required only if you are migrating from an Oracle 11g database to an Oracle 12c database.

7 *Uninstall the Cognos 10.2.1 software* (on page 70).

8 *Update Reporting servers required software* (on page 70).

9 *Install and customize the Cognos 10.2.2 software* (on page 71).

10 *Upgrade reports* (on page 72).

11 *Modify PFRSetupTrial.xml* (on page 72).

12 *Delete trusted user information from the trial_urls table* (on page 73).

Back up the Content Store database

Create a backup of the Content Store database and store it in a secure location. If the upgrade fails for any reason, you can restore the database from your backup.

Run a consistency check on the Content Store database

1 Use the Private Gateway to log in to the Cognos application as a system administrator.

2 Select **Reporting Administration > Configuration tab >Content Administration**.

3 Click **New Content Maintenance > Consistency Check**.

4 Enter a name for the consistency check, and click **Next**.

The Select with options page appears.

5 Select **Internal references** from the Consistency check options, and click **Next**.

6 Select **Save and run once**, and click **Finish**.

The Run with options page appears.

7 Select **Find Only** from the Mode options, and click **Run**.

8 Select **View details of this content maintenance task after closing this dialog**, an click **OK**.

The View run history details page appears.

9 Click **Close**.

Note: If the View run history details page indicates that the Content Store database was repaired during the consistency check, create a new backup of the database.

Clean the Cognos notifications database

1 Log into SQLPLUS as the Content Store database user.

2 Run NC_Drop_ORA,sql, using the following syntax:

```
@NC_Drop_ORA
```

3 Stop the Cognos service on all reporting servers.

Export up the Content Store database

Note: This step is required only if you are migrating from an Oracle 11g database to an Oracle 12c database.

- Use the Oracle data pump (**expdp**) to export the:
  - Content Store database schema.
  - PFCAPAdmin user schema.

  For more information, see your Oracle database documentation.

Back up customized files

The upgrade to the Cognos 10.2.2 software will overwrite any customized files in the Cognos installation folders that you have customized.

Back up the following on every Cognos server:

- The **cogstartup.xml** file.
- Any customized files in the in the Cognos directories.

Import Content Store and PFCAPAdmin user into the Oracle 12c instance

Note: This step is required only if you are migrating from an Oracle 11g database to an Oracle 12c database.

- Use the Oracle data pump (**impdp**) to import the:
  - Content Store database schema.
  - PFCAPAdmin user schema.

  For more information, see your Oracle database documentation.

Uninstall the Cognos 10.2.1 software

1 Uninstall the following applications from all the reporting servers:
   - The Cognos 10 Gateway Customizations for InForm.
   - The Cognos 10.2.1 software.

2 Delete any files and folders that are not removed by the uninstall process.

3 Restart the reporting servers.

Update Reporting servers required software

Make sure that your Cognos 10 BI Reporting application servers meet the InForm 6.1.1.1 system requirements for the InForm 6.1.1.1 release.

For more information, see the *Release Notes*.

Install and customize the Cognos 10.2.2 software

Note: For information on how to install and customize the Cognos 10.2.2 software, see the *Installation Guide*.

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

2 Install the Cognos hotsites in this order:

   a up_bisrvr_winx64h_10.2.6100.1032

   b up_bisrvr_winx64h_10.2.6100.1037

3 Install Fix Pack 1 (FP1) for the Cognos 10.2.2 software.

4 Install the following interim fix update:

   a up_bisrvr_winx64h_10.2.6102.502

5 Install the final hotsite:

   a up_bisrvr_winx64h_10.2.6104.1072

6 Customize the Cognos 10.2.2 software on the Cognos servers.

   a Run the Cognos 10 Customization for InForm wizard (CRNConfig) on all Report and Content Manager servers.

   b Run the Cognos 10 Gateway Customization for InForm wizard (CRNGatewayConfig) on all Gateway servers.

7 Create a LDAP namespace for the Content Store.

8 Update the domain settings for Cognos-generated cookies

9 Perform other configuration and post-installation tasks, including:

   - Disable the indexed search option on the Reporting server.
   - Enable clinical model generation in a multi-server environment.
   - Enable HTTPS and TLS.

   For information, see the *Installation Guide*.

10 Start the Cognos 10 BI Reporting servers.

Upgrade reports

1 Use the Private Gateway to log in to the Cognos application as a system administrator.

2 Navigate to **Reporting Administration** > **Configuration tab** > **Content Administration.**

3 Enter a name for task. Click **Next**.

The Select the options page displays.

4 Click **Add** and **Public Folders**.

5 In the **Public Folders** section, select all trial folders and add them to the upgrade, and click **OK**.

6 Click **Next**.

7 Select **Save and run once**. Click **Finish**.

8 Select **Now** and click **Run**.

9 Select **View the details of this content maintenance task after closing this dialog** and click **OK**.

The View run history details page displays the status of the upgrade.

Modify PFRSetupTrial.xml file for the in-place upgrade

Modify PFRSetupTrial.xml file (located in the <*InstallationDirectory*>\InForm\Bin directory) as follows:

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

ReportsUpgrade is a tag that triggers the reporting specification upgrade.

2 Update connectionstring in PFRSetupTrial.xml file to Oracle connection string for the reporting database (in a single database configuration, use the study database connection string).

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

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

- **sysadmin_namespace**—Oracle Directory Server admin namespace.
- **sysadmin_uid**—User name for the Oracle Directory Server admin namespace.
- **sysadmin_pass**—Password you chose when creating the Oracle Directory Server admin namespace user.
- **publisher_namespace**—Custom Authentication Provider (CAP) namespace.
- **publisher_uid**—InForm study user who is a member of the Publisher and Sponsor Users (or Site Users) Reporting groups.
- **publisher_pass**—Password of the InForm study user.
- **dispatcher_url**—Internal URI that the InForm server uses to communicate with the Cognos 10 BI server.
- **trial_name**—Name of the InForm study.

- **reportdb_pass**—Password for the reporting schema user.
- **same_env_report_upgrade**—Enter Y to indicate that the PFRInit command is being run as part of an upgrade in the same reporting environment. This parameter upgrades the XML specifications of all reports for the study from Cognos 10.2.1 BI Reporting to Cognos 10.2.2. BI Server.

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

Run PFRInit

- For each InForm study in the reporting environment, 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 trusted user information from the trial_urls table

1. Log into SQL*Plus as the PFCAPAdmin user.
2. Delete the contents of trusted_user column from all rows in the trial_urls table.
3. Commit the changes.

Running an in-place upgrade of an InForm 6.1 reporting environment

1 Copy **Op package and reports 6_1_1_1.zip**, located in the <Installation_Directory>\InForm\Bin\DBOra\Reporting folder on the InForm application server, to the <Installation_Directory>\deployment folder on the Cognos server.

   For more information, see step 3 in ***Run the in-place upgrade*** (on page 41).

2 Stop the Cognos servers.

3 If you are upgrading from InForm 6.1, install the following Cognos interim fix updates on the Cognos servers in the following order:

   a up_bisrvr_winx64h_10.2.5000.1125 (Interim Fix 4).

   b up_bisrvr_winx64h_10.2.5000.1129 (Interim Fix 5).

   c up_bisrvr_winx64h_10.2.5000.1137 (Interim Fix 6).

   d up_bisrvr_winx64h_10.2.5000.1139 (Interim Fix 7).

   e up_bisrvr_winx64h_10.2.5000.1148 (Interim Fix 8).

   f up_bisrvr_winx64h_10.2.5000.1151 (Interim Fix 9).

   g up_bisrvr_winx64h_10.2.5000.1153 (Interim Fix 10).

   h up_bisrvr_winx64h_10.2.5000.1156 (Interim Fix 11).

4 If you are upgrading from InForm 6.1.0.1, install the following Cognos interim fix updates on the Cognos servers in the following order:

   a up_bisrvr_winx64h_10.2.5000.1137 (Interim Fix 6).

   b up_bisrvr_winx64h_10.2.5000.1139 (Interim Fix 7).

   c up_bisrvr_winx64h_10.2.5000.1148 (Interim Fix 8).

   d up_bisrvr_winx64h_10.2.5000.1151 (Interim Fix 9).

   e up_bisrvr_winx64h_10.2.5000.1153 (Interim Fix 10).

   f up_bisrvr_winx64h_10.2.5000.1156 (Interim Fix 11).

5 Start the Cognos servers.

APPENDIX A

InForm registry key reference

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About registry key migration

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

- HKLM\Software\OracleHS\AuthenticationFilter
- HKLM\Software\OracleHS\InForm
- HKLM\Software\OracleHS\InForm\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 InForm application server.

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

HKLM\Software\OracleHS\AuthenticationFilter

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

HKLM\Software\OracleHS\InForm

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

HKLM\Software\OracleHS\InForm\PFAppMngr

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

HKLM\Software\OracleHS\InForm\PFImport

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

HKLM\Software\OracleHS\InForm\PFMngrExecutionPlan

Name	Description
FromAddress	Email From Address.

HKLM\Software\OracleHS\InForm\PFMngrTrial

Name	Description
{TRIALNAME}_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.

APPENDIX B

Restoring an InForm 6.0 or 6.1 release

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Restore an InForm 6.0 or 6.1 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*** (on page 37) to restore your InForm 6.0 or 6.1 environment.

To restore an in-place upgrade to an InForm 6.0 or 6.1 release:

1 Open a Command Prompt window.

2 Run the following command to stop all InForm studies.

```
pfadmin /STOPALL
```

3 Rename the OracleHS folder to **OracleHS-61**.

4 Rename the folder containing the InForm 6.0 or 6.1 files (for example, OracleHS-60) to **OracleHS**.

5 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 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 pfst46.dmp pfst46uid
```

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

6 Import the **HKEY_LOCAL_MACHINE\Software\OracleHS** key into the Windows registry to restore the InForm 6.0 or 6.1 settings.

7 Add the pfUSR_<*machinename*> user to the Administrators group on the InForm application server.

> **Note:** This step is only required if you are restoring an InForm 6.1 release.

About the documentation

Where to find the product documentation

The product documentation is available from the following locations:

- **My Oracle Support** (https://support.oracle.com)—*Release Notes* and *Known Issues*.
- **Oracle Technology Network** (http://www.oracle.com/technetwork/documentation/hsgbu-154445.html)—The most current documentation set, excluding the *Release Notes* and *Known Issues*.

If the software is available for download, the complete documentation set is available from the Oracle Software Delivery Cloud (https://edelivery.oracle.com).

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

Documentation accessibility

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

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Documentation

Document	Description	Part number	Last updated
Release Notes	The *Release Notes* document describes enhancements and issues fixed in the current release, and other late-breaking information.	E80527-01	6.1.1.1
Known Issues	The *Known Issues* document provides detailed information about the known issues in this release, along with workarounds, if available.	E61318-01	6.1.1

Document	Description	Part number	Last updated
Secure Configuration Guide	The *Secure Configuration Guide* provides an overview of the security features provided with the Oracle® Health Sciences InForm application, including details about the general principles of application security, and how to install, configure, and use the InForm application securely.	E61320-01	6.1.1
Upgrade and Migration Guide	The *Upgrade and Migration Guide* provides instructions for upgrading and migrating the InForm software and InForm Portal software to the current InForm release, and for upgrading the Cognos software for use with the Reporting and Analysis module.	E80528-01	6.1.1.1
Installation Guide	The *Installation Guide* describes how to install the software and configure the environment for the InForm application and Cognos software.	E81427-01	6.1.1.1
Study and Reporting Setup Guide	The *Study and Reporting Setup Guide* describes how to perform the tasks that are required to set up an InForm study and configure the Reporting and Analysis module for the study.	E61323-01	6.1.1
User Guide	The *User Guide* provides an overview of the InForm application including details on multilingual studies, how to navigate through the user interface, how to manage a study-specific Home page with the InForm Portal application, and how to accomplish typical tasks you perform while running a clinical study. This document is also available from the user interface.	E61324-01	6.1.1
Reporting and Analysis Guide	The *Reporting and Analysis Guide* provides an overview of the Reporting and Analysis module. It includes a brief overview of the Reporting and Analysis interface, illustrates how to access the InForm Ad Hoc Reporting workspace, and describes the study management and clinical data packages available for creating reports. It also provides detailed descriptions of each standard report that is included with your installation.	E61326-01	6.1.1
Reporting Database Schema Guide	The *Reporting Database Schema Guide* describes the Reporting and Analysis database schema, and provides information on creating Reporting Database Extracts (RDEs).	E61327-01	6.1.1

Document	Description	Part number	Last updated
Utilities Guide	The *Utilities Guide* provides information about and step-by-step instructions for using the following utilities: • PFConsole utility • MedML Installer utility • InForm Data Import utility • InForm Data Export utility • InForm Performance Monitor utility • InForm Report Folder Maintenance utility This guide also provides reference information for the MedML elements and scripting objects that are used to import and export data to and from the InForm application, as well as sample data import XML.	E61328-01	6.1.1
MedML Installer utility online Help	The MedML Installer utility online Help provides information about, and step-by-step instructions for using, the MedML Installer utility, which is used to load XML that defines study components into the InForm database. This guide also provides reference information for the MedML elements and scripting objects that are used to import and export data to and from the InForm application, as well as sample data import XML. This document is also available from the user interface.	NA	NA
InForm Data Export utility online Help	The InForm Data Export utility online Help provides information about and step-by-step instructions for using the InForm Data Export utility, which is used to export data from the InForm application to the following output formats: • Customer-defined database (CDD) • Name value pairs This document is also available from the user interface.	NA	NA

Document	Description	Part number	Last updated
InForm Data Import utility online Help	The InForm Data Import utility online Help provides information about and step-by-step instructions for using the InForm Data Import utility, which is used to import data into the InForm application. This document is also available from the user interface.	NA	NA
Clinical Data API Guide	The *Clinical Data API Guide* provides information about submitting data to the InForm application in InForm ODM format.	E61329-01	6.1.1
Third Party Licenses and Notices	The *Third Party Licenses and Notices* document includes third party technology that may be included in or distributed with this product.	E61330-01	6.1.1
Secure Development Guide	The *Secure Development Guide* provides an overview of common security risks for developers using Application Programming Interfaces (APIs) with the Oracle® Health Sciences InForm application, and information on how to address those risks.	E72493-01	6.1.1