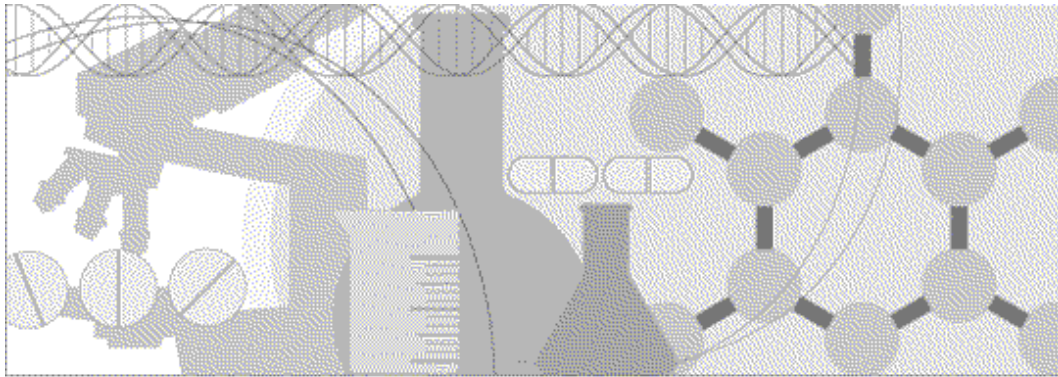


Portal Administration Guide

InForm Portal™ 4.6 SP3



ORACLE®

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About this guide

The *Portal Administration Guide* provides step-by-step instructions for setting up the InForm Portal software, and configuring and managing the InForm Portal application.

Note: The InForm Portal software is installed as part of the InForm software installation procedure. Therefore, this *Administration Guide* assumes that the InForm Portal software has been installed. For more information, see the *Installation Guide*.

Audience

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

Related information

Documentation

All documentation is available from the Phase Forward Download Center.

Item	Description
<i>Release Notes</i>	The <i>Release Notes</i> document describes enhancements introduced and problems fixed in the current release, upgrade considerations, release history, and other late-breaking information.
<i>Known Issues</i>	<p>The <i>Known Issues</i> document provides detailed information about the known issues in this release, along with workarounds, if available.</p> <p>Note: The most current list of known issues is available on the Phase Forward Extranet.</p> <p>To sign in to the Extranet, go to www.phaseforward.com and click Customer Login. Enter your email address and password, and navigate to the Known Issues section. Select a product, and then enter your search criteria.</p>
<i>Installation and Configuration</i>	<p>The <i>Installation and Configuration</i> guide describes how to install the software and configure the environment for the InForm application and Cognos 8 Business Intelligence.</p> <p>This document is also available from the Documentation CD.</p>
<i>Setting Up a Trial with InForm Architect and MedML</i>	<p>The <i>Setting Up a Trial with InForm Architect and MedML</i> describes how to design and implement trials in the InForm application using the InForm Architect application.</p> <p>This document is also available from the Documentation CD.</p>
<i>Step by Step for CRCs and CRAs</i>	<p>The <i>Step by Step for CRCs and CRAs Guide</i> describes how to use the InForm application to:</p> <ul style="list-style-type: none"> • Screen and enroll patients. • Enter, update, and monitor clinical data. • Enter and respond to queries. • Run trial management reports and clinical data listings. <p>This document is also available from the Documentation CD and the user interface.</p>

Item	Description
<i>Reporting and Analysis Guide</i>	<p>The <i>Reporting and Analysis Guide</i> provides an overview of the Reporting and Analysis module. It includes a brief overview of the Reporting and Analysis interface, illustrates how to access the Ad Hoc Reporting feature, and describes the study management and clinical data packages available for reporting. It also provides detailed descriptions of each standard report that is included with your installation.</p> <p>This document is also available from the Documentation CD and the user interface.</p>
<i>Utilities Guide</i>	<p>The <i>Utilities Guide</i> provides information about and step-by-step instructions for using the following utilities:</p> <ul style="list-style-type: none">• PFConsole utility• MedML Installer utility• InForm Data Import utility• InForm Data Export utility• InForm Performance Monitor utility• InForm Report Folder Maintenance utility <p>This document is also available from the Documentation CD.</p>
<i>Reporting Database Schema</i>	<p>The <i>Reporting Database Schema</i> Guide describes the InForm reporting database schema.</p> <p>This document is also available from the Documentation CD.</p>
<i>Portal Administration Guide</i>	<p>The <i>Portal Administration Guide</i> provides step-by-step instructions for setting up the InForm Portal software, and configuring and managing the InForm Portal application.</p> <p>This document is also available from the Documentation CD.</p>
Online Help	<p>The online Help describes how to use and administer the InForm application.</p> <p>This document is available only from the user interface.</p>
InForm Architect online Help	<p>The InForm Architect online Help describes how to design and implement trials in the InForm application using the InForm Architect application.</p> <p>This document is available only from the user interface.</p>
MedML Installer utility online Help	<p>The MedML Installer utility online Help provides information about, and step-by-step instructions for using, the MedML Installer utility, which is used to load XML that defines study components into the InForm database.</p> <p>This guide also provides reference information for the MedML elements and scripting objects that are used to import and export data to and from the InForm application, as well as sample data import XML.</p> <p>This document is available only from the user interface.</p>

Item	Description
InForm Data Export utility online Help	<p>The InForm Data Export utility online Help provides information about and step-by-step instructions for using the InForm Data Export utility, which is used to export data from the InForm application to the following output formats:</p> <ul style="list-style-type: none">• AutoCode.• Customer-defined database (CDD).• Name value pairs.• Oracle Clinical. <p>This document is available only from the user interface.</p>
InForm Data Import utility online Help	<p>The InForm Data Import utility online Help provides information about and step-by-step instructions for using the InForm Data Import utility, which is used to import data into the InForm application.</p> <p>This document is available only from the user interface.</p>

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Phase Forward also provides assistance with User Management, Site Assessment, and Provisioning. Please refer to your Master Services Agreement and individual Statement of Work to determine if you are eligible to use these services.

CHAPTER 1

About the InForm Portal application

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Overview of the InForm Portal application

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

- White papers.
- Links to key contacts.
- News items.

The InForm Portal application provides:

- An interface for customizing the look and content of the InForm Portal application.
- Automatic document history logging, with earlier versions of documents stored and available to comply with regulations.
- Customizable administrative, user group, and access settings for fine-tuning user group rights and privileges.
- Security levels to prevent access or changes by unauthorized individuals.

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

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

InForm Portal components

The InForm Portal application is integrated with an InForm trial/study, so the InForm Portal application appears in the InForm content pane. To display the InForm Portal application, in the InForm navigation pane, click the Home link. The InForm Portal pages appear within the InForm application along with InForm navigation pane.

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

- Custom tabs appear along the top of the InForm Portal application, to the right of the InForm navigation pane.

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

Each tab can be further organized into sections.

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

Supported document types

The InForm Portal application supports uploading the following types of documents:

- Microsoft Word/RTF and DOC.
- Adobe Acrobat Portable Document Format (PDF).
- Hypertext Markup Language (HTML).
- Microsoft PowerPoint.
- Microsoft Excel.
- Microsoft Project.
- Images in GIF and JPG format.

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

User roles and rights for accessing the InForm Portal application

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

User Type	Privileges
Configuration Administrator	<ul style="list-style-type: none"> • View all InForm Portal tabs including the Config Admin and Admin tabs. • Create and edit tabs and sections. For more information, see <i>Creating and naming a tab</i> (on page 24). • Upload documents to the InForm Portal application. • Modify, add, and update InForm Portal content. • Define Portal Administrators and their rights. • Define InForm Portal users. • Enable sponsor and user audit trails. • Change the InForm Portal colors. <p>Note: This User Type also needs the InForm rights to modify user information.</p>

User Type	Privileges
Portal Administrator	<ul style="list-style-type: none">• View the options for which the Configuration Administrator has granted authority.• View the Admin tab.• Edit tabs.• Add and edit sections to tabs.• Upload documents to the InForm Portal application.• Modify, add, and update InForm Portal content.• Change the InForm Portal colors.
Sponsor	<ul style="list-style-type: none">• Read information in the InForm Portal application related to the rights associated with their user ID, including those that were specified as sponsor-only. <p>Note: This User Type cannot modify or add to the InForm Portal application in any way.</p>
Site	<ul style="list-style-type: none">• Read information in the InForm Portal application related to the rights associated with their user ID and not specified as sponsor-only. <p>Note: This User Type cannot modify or add to the InForm Portal application in any way.</p>

System requirements

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

- The InForm 4.6 software must be installed and configured.
- A trial/study must be set up and running.

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

- The InForm Portal application must be installed.

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

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

CHAPTER 2

Setting up the InForm Portal application

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Worksheet for the InForm Portal setup variables

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

- Trial/study name.
- Server and drive on which the InForm Portal application runs.

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

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

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

Item	Description/Value	Reference
Study Name	<p>Name of the InForm trial/study that will contain the InForm Portal application.</p> <p>Note: To find the trial/study name, DSN, user name, and password, open a Command Prompt window, change to the <drive>:\PF\InForm directory and run the following command:</p> <pre>PFADMIN VIEW SERVICE</pre> <p>Example: PFST45</p> <p>Value:</p>	<ul style="list-style-type: none"> • Step 2 (on page 12) • Step 3 (on page 13)
InForm Portal Virtual Directory Path	<p>Physical path to the virtual directory for the InForm Portal application. The virtual directory for the InForm Portal application is located under the virtual directory for the trial/study.</p> <p>Example: E:/PF/InForm/InFormPortal_PFST45</p> <p>Value:</p>	<ul style="list-style-type: none"> • Step 2 (on page 12)
Oracle Connect String	<p>Oracle connection string for the InForm database.</p> <p>Located in the tnsnames.ora file.</p> <p>Example: Trial1</p> <p>Value:</p>	<ul style="list-style-type: none"> • Step 2 (on page 12)

Item	Description/Value	Reference
InForm Portal User Name	<p>User name for the InForm Portal you are setting up.</p> <p>Example: InFormPortalUID</p> <p>Value:</p>	<ul style="list-style-type: none"> • Step 2 (on page 12)
InForm Portal Password	<p>Password for the InForm Portal application you are setting up.</p> <p>Example: InFormPortalPID</p> <p>Value:</p>	<ul style="list-style-type: none"> • Step 2 (on page 12)
Study Connect String	<p>Oracle connection string for the InForm database for the trial/study.</p> <p>Example: Trial1</p> <p>Value:</p>	<ul style="list-style-type: none"> • Step 2 (on page 12)
Study DSN	<p>Data Source Name of the InForm trial/study that will contain the InForm Portal application.</p> <p>Note: To find the study name, DSN, user name, and password, open a Command Prompt window, change to the <drive>:\PF\InForm directory and run the following command:</p> <p>PFADMIN VIEW SERVICE</p> <p>Example: PFST45DSN</p> <p>Value:</p>	<ul style="list-style-type: none"> • Step 2 (on page 12)
Study User Name	<p>User name of the InForm trial/study that will contain the InForm Portal application.</p> <p>Note: To find the trial/study name, DSN, user name, and password, open a Command Prompt window, change to the <drive>:\PF\InForm directory and run the following command:</p> <p>PFADMIN VIEW SERVICE</p> <p>Example: PFST45UID</p> <p>Value:</p>	<ul style="list-style-type: none"> • Step 2 (on page 12)

Item	Description/Value	Reference
Study Password	Password of the InForm trial/study that will contain the InForm Portal application. Note: To find the trial/study name, DSN, user name, and password, open a Command Prompt window, change to the <drive>:\PF\InForm directory and run the following command: PFADMIN VIEW SERVICE Example: PFST45PID Value:	• Step 2 (on page 12)
Oracle System User Name	Oracle system user name. Example: sys Value:	• Step 2 (on page 12)
Oracle System Password	Oracle system password. Example: oracle Value:	• Step 2 (on page 12)
InForm Portal Tablespace Path	Path to the Oracle tables. Example: D:\oracle\product\10.2.0\oradata Value:	• Step 2 (on page 12)

Entering commands using the setup variables

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

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

Step 1: Run the InForm Portal executable

- 1 Select **Start > Run**.

The Run dialog box appears.

- 2 Click **Browse**, and locate the **InFormPortalSetup.exe** file.
- 3 Click **OK**.

The InForm Portal InstallShield Wizard appears.

- 4 Click **Next**.
- 5 Accept the default location, or click **Change** and browse to the desired location.
- 6 Click **Next**.
- 7 Click **Install**.

During the installation the program creates two associated folders named Public and Private.

A message appears to indicate that the installation is complete.

- 8 Click **Finish**.

Note: For IIS 6.0, the maximum size of a file that can be uploaded to the InForm Portal application is set to 4 MB by default. For information on changing the default file size limit, see your Microsoft documentation.

Step 2: Run the Portal Configurator

- 1 Select **Start > Program Files > Oracle > InForm 4.6 > Portal Configuration Wizard**.

The Portal Configuration wizard appears.

- 2 In the **Study Name** field, select *<Study Name>*.
- 3 Click **Next**.
- 4 Accept the default location, or click **Browse** and select the desired location.

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

- 5 Click **Next**.

The Database Configuration page appears.

- 6 Complete the following fields:
 - **Portal DB Connection String**—*<Oracle Connect String>*.
 - **Portal DB Username**—*<InForm Portal User Name>*.
 - **Portal DB User Password**—*<InForm Portal Password>*.
 - **Study DB Connection String**—*<Study Connect String>*.
 - **Study DSN**—*<Study DSN>*.
 - **Study DB Username (Study UID)**—*<Study User Name>*.
 - **Study DB User Password (Study PID)**—*<Study Password>*.
 - **Oracle System Username**—*<Oracle System User Name>*.
 - **Oracle System Password**—*<Oracle System Password>*.
 - **Portal DB Tablespace Location**—*<InForm Portal Tablespace Path>*.
- 7 Select or deselect **Create Portal DB Schema**.

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

- 8 Click **Next**.

The confirmation page appears.
- 9 Click **Configure**.
- 10 Click **Finish**.

Step 3: Set up the Configuration Administrator

A Configuration Administrator is an InForm Portal user who has the rights to configure global settings for the InForm Portal application, and to create and manage Portal Administrators (InForm Portal users with certain administrator rights). Configuration Administrators are members of the InForm Portal Admin rights group. You create this rights group in the InForm application.

For more information, see *About the Configuration Administrator* (on page 19).

Note: You can also use MedML to set up a Configuration Administrator user and assign rights. For more information, see the MedML online Help or the *Utilities Guide*.

Creating the InForm Portal Admin rights group

- 1 In a web browser, open the InForm trial/study in which the InForm Portal application is installed.
- 2 Log in as a user who has rights to create a rights group.
- 3 In the InForm navigation pane, click **Admin**.
- 4 Select the **Rights** tab.
- 5 Click **Add Rights Group**.

The Rights Group page appears.

- 6 In the **Rights Group Name** field, type **InForm Portal Admin**.
- 7 Assign the InForm Portal Admin group one or more rights.

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

- 8 Click **Submit**.

Assigning rights to the Configuration Administrator

- 1 Select the **Users** tab.
- 2 Next to the InForm user who is to be the Configuration Administrator, select **Properties**.

The User Group Selection page appears.

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

- 3 From the **Rights Group** drop-down list, select **InForm Portal Admin**.
- 4 Click **Submit**.
- 5 Select the **Users** tab.
- 6 Locate the user that you just assigned to the InForm Portal Admin rights group.
- 7 Select the user name.
The Users View page appears.
- 8 Scroll to the bottom of the page and in the **Home Page** field, type:
`./Portal/default.htm`
- 9 Click **Submit**.

Step 4: Customize the InForm Portal Home page

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

- 1 To add a logo:
 - a Obtain a GIF file containing the logo.
 - b Name the file **company_logo.gif**.
 - c Store the file in the *<InForm Portal Virtual Directory Path>/images* folder.
- 2 To add text to the InForm Portal Home page, create an HTML file containing the text.
- 3 Save the file as **homedefault.html** in the *<InForm Portal Virtual Directory Path>/views/display* folder.

Uninstalling the InForm Portal software

- 1 Reset the Home page of every InForm Portal user from the InForm Portal Home page to the Home page of the study.
- 2 Do one of the following:
 - To remove trials/studies, remove the virtual directory for each configured trial/study by using the following command:

```
pfadmin remove trial
```
 - To remove the InForm Portal application without removing trials/studies, delete the installed InForm Portal files from the *<InForm Portal Virtual Directory Path>* within IIS.
- 3 Select **Start > Settings > Control Panel > Add/Remove Programs**.
- 4 Select **InForm Portal**, and click **Remove**.
A confirmation dialog box appears.
- 5 Click **Yes**.

CHAPTER 3

InForm Portal configuration

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Overview of configuring the InForm Portal application

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

The Configuration Administrator should be set up when the InForm Portal is set up.

For more information, see ***Step 2: Set up the Configuration Administrator*** (on page 13).

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

- The Configuration Administrator account has the right to modify user information in the InForm application.
- The InForm Portal application is assigned as the Home page that appears when the Configuration Administrator logs into the InForm application.
- If applicable, the Home page contains the correct logo and information for the trial/study.

For more information, see ***Step 3: Customize the InForm Portal Home page*** (on page 15).

About the Configuration Administrator

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

- *Logs in as the Configuration Administrator using the account that was set up when the InForm Portal application was installed* (on page 23).
- *Assigns Portal Administrator rights* (on page 23).
- *Creates and name tabs* (on page 24).
- *Designates the InForm Portal application as the Home page for Portal Administrators* (on page 25).
- *Enables or disables the viewing of audit trails* (on page 25).
- *Updates the InForm Portal database credentials* (on page 26).

Optional.

- *Edits the rights of Portal Administrators* (on page 26).

Optional.

- *Disables Portal Administrators* (on page 27).

Optional.

- *Sets up key contacts* (on page 35).

Optional. Can also be done by a Portal Administrator.

- *Customizes the InForm Portal colors* (on page 41).

- Optional. Can also be done by a Portal Administrator.

Tab types and InForm Portal pages

The following tabs are generic to most InForm Portal applications.

Tab Type	Restrictions	Attributes
Config Admin	Can only be viewed by the Configuration Administrator.	Displays the rights assigned to the Portal Administrators. Allows the Configuration Administrator to add or edit Portal Administrators and their rights, and to configure the InForm Portal application.
Admin	Can only be viewed and edited by the Configuration Administrator or by Portal Administrators. The page displays only the functions assigned to Portal Administrators.	Allows the Configuration Administrator or the Portal Administrators to upload or update documents, sections, tabs, and tab order, and to specify the InForm Portal colors.

Tab Type	Restrictions	Attributes
Home	The text on the Home page can only be changed by a Portal Administrator with sufficient privileges. Logo changes can only be made by the Configuration Administrator.	<p>The HTML document (homedefault.htm) is stored in the user folder associated with the InForm Portal application. The logo (company_logo.gif) is stored in the images folder and appears on all tabs.</p> <p>The HTML document displays inline, meaning that the contents of the document (and not a link to the document) are displayed.</p> <p>This page is available to all end users who have the InForm Portal application assigned as their Home page.</p> <p>This tab can be renamed and deactivated.</p>
Contacts	Only the Configuration Administrator or a Portal Administrator with the right to modify user information in the InForm application can designate the individuals that appear on this page.	<p>Displays a table containing the contact information for users marked Public in the InForm database.</p> <p>Information comes directly from the InForm database. If the data is local (for example, if it includes a link to an email site), the InForm Portal application contains the link.</p> <p>This tab can also be renamed and deactivated.</p>
Documents	<p>A section must be defined within a tab before a document can be uploaded to this page.</p> <p>In order for the section heading to appear under the specified tab, at least one document must be associated with a section heading</p>	<p>Documents are stored in the InForm Portal database. This page can hold Microsoft Word, Microsoft Excel spreadsheet software, Microsoft PowerPoint, Microsoft Project, Adobe Acrobat (PDF), JPEG, and GIF files.</p> <p>You can upload the same document with up to three different file extensions at one time.</p> <p>An HTML document can be uploaded to appear directly in the browser.</p> <p>The tab can be renamed and deactivated.</p>

Tab Type	Restrictions	Attributes
Help	Help can be edited only by the Configuration Administrator and Portal Administrators with sufficient rights.	<p>Displays the names of the tabs for the InForm Portal application, along with their descriptions, as well as information about file formats and how to contact Phase Forward if you need assistance.</p> <p>You can create a web page that contains trial/study-specific help by uploading an HTML file (web page) that contains the text you want to display on the Help tab. Do not include header tags in the HTML file.</p> <p>This page is available to all end users who have the InForm Portal application assigned as their Home page.</p> <p>The tab can be renamed and deactivated.</p>

Considerations for working with tabs

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

When working with tabs, keep the following in mind:

- You can restrict the number of tabs that appear in any given InForm Portal application.

Note: You cannot access more than 13 tabs in the InForm Portal application. There is no horizontal scroll bar.

- After a tab name is created, that tab name always appears on the Edit Tab page.
 - The tab can then be activated or deactivated as necessary.
 - Tab names remain on the list of tab names and can never be deleted.
- You can upload a document only to a section within a tab.
 - You must specify a section in order to upload a document.
 - The tab page associated with the tab name does not actually appear in the user interface until there is content on the page.

Document audit trail

The InForm Portal application automatically logs the history of every uploaded document, including the following:

- Name.
- Time.
- Date of the upload or change.
- Reason for the change.

The InForm Portal application can be configured to:

- Allow only the most recent version of a document to be seen by hiding all the older files.
- Display all versions of the documents ever uploaded.

Note: The InForm Portal application stores all versions of every document, so that a complete audit trail is maintained.

For more information, see *Enabling the display of document audit trails* (on page 25).

Configuring the InForm Portal application

Accessing the InForm Portal application as the Configuration Administrator

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

- 1 Open an Internet browser.
- 2 Type the URL for your trial/study, and press **Enter**.

The log in page appears.

- 3 Log in as the Configuration Administrator.

For more information, see *Step 2: Set up the Configuration Administrator* (on page 13).

- 4 In the InForm navigation pane, click **Home**.

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

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

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

- **Options in the left column** are used to set up Portal Administrators, assign rights to the Configuration Administrator and the Portal Administrators, and set the audit trail status.
- **Admins table** shows the rights assigned to the Configuration Administrator and the Portal Administrators that are set up for the InForm Portal application.
- **Audit Trail Status** indicates whether sponsor and user audit trails are enabled.

Assigning Portal Administrator rights

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

- 1 In the InForm navigation pane, click **Home**.
- 2 In the InForm Portal application, select the **Config Admin** tab.
- 3 In the **Config Options** section, click **Add Portal Admin**.
- 4 In the **InForm User** field, select the name of the user to which you want to assign Portal Administrator rights.
- 5 Do one of the following:
 - For the Configuration Administrator, select all rights.
 - For a Portal Administrator, select each right you want to assign to the Portal Administrator.

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

Note: Phase Forward recommends that you do not give Portal Administrators the right to add tabs. This right should be reserved for Configuration Administrators.

- 6 Click **Submit**.
- 7 To view the updates, on the **Config Admin** page, click **Refresh**.

Creating and naming a tab

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

For more information, see *Considerations for working with tabs* (on page 21).

Note: You cannot access more than 13 tabs in InForm Portal application, including the Config Admin and Admins tabs. There is no scroll bar.

- 1 Log in to the InForm application as the Configuration Administrator.
- 2 In the InForm navigation pane, click **Home**.
- 3 In the InForm Portal application, select the **Admin** tab.
- 4 In the **Add New Records** section, click **Tabs**.
A list of the existing tab headings appears, followed by the New Tab field.
- 5 Complete the following fields:
 - **New Tab**—Name that you want to appear on the tab.
 - **Sponsor Tab**—Allow only sponsor users to see the tab.
 - **Description**—Brief description of the contents of the tab.
- 6 Click **Submit**.
- 7 To view the newly created tab, click **Refresh**.

Note: If you do not want to use the default tab names supplied with the InForm Portal application, an administrator can edit the names. For more information, see *Renaming a tab* (on page 32).

Designating the InForm Portal application as the Home page

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

The Configuration Administrator performs this procedure for every Portal Administrator.

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

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

- 1 Log in to the InForm application.
- 2 In the InForm navigation pane, select **Admin**.
- 3 Select the **User** tab.
- 4 Select the user for whom you want to designate the InForm Portal application as the Home page.
- 5 Scroll to the bottom of the user record.
- 6 In the **Home Page** field, type the path to InForm Portal Home page (for example, `./portal/default.htm`).
- 7 Click **Submit**.

Enabling the display of document audit trails

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

For more information, see *Document audit trail* (on page 22).

- 1 Log in to the InForm application as the Configuration Administrator.
- 2 In the InForm navigation pane, click **Home**.
- 3 In the InForm Portal application, select the **Config Admin** tab.
- 4 In the **Config Options** section, click **System Config**.
- 5 In the **User Audit Trail** field, select **Enabled**.
- 6 Click **Submit**.

Note: If the Configuration Administrator has enabled this function, users can view the document history by clicking the + (maximize) button adjacent to the document. To collapse the document history so that only the most recent version of the document is visible, users click the - (minimize) button.

Updating the InForm Portal database credentials

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

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

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

- 2 Save the **ChangePortalDBConnectionString.xml** file.
- 3 Select **Start > Run**.
- 4 Type **cmd**.
- 5 Click **OK**.
A Command Prompt window appears.
- 6 Type the following:
PortalConfig.exe -updv ChangePortalDBConnectionString.xml
- 7 Press **Enter**.

Editing the rights of a Portal Administrator

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

- 1 Log in to the InForm application as the Configuration Administrator.
- 2 In the InForm navigation pane, click **Home**.
- 3 In the InForm Portal application, select the **Config Admin** tab.
- 4 In the **Config Options** section, click **Edit Portal Admin**.
- 5 To the right of the name of the Portal Administrator you want to edit, click **Edit**.
- 6 Select or deselect the rights for this Portal Administrator.
- 7 Click **Submit**.

Disabling a Portal Administrator

- 1 Log in to the InForm application as the Configuration Administrator.
- 2 In the InForm navigation pane, click **Home**.
- 3 In the InForm Portal application, select the **Config Admin** tab.
- 4 In the **Config Options** section, click **Edit Portal Admin**.
- 5 To the right of the name of the Portal Administrator you want to edit, click **Edit**.
- 6 In the **Active** field, select **No**.
- 7 Click **Submit**.

CHAPTER 4

InForm Portal administration

In this chapter

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Overview of administering the InForm Portal application

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

Although the responsibilities of each Portal Administrator depend on the rights granted by the Configuration Administrator, as a group they are responsible for the following:

- *Designating the InForm Portal application as the Home page* (on page 25).
- *Renaming tabs* (on page 32).
- *Reordering tabs* (on page 32).
- *Adding sections to tabs* (on page 33).
- *Activating or deactivating tabs* (on page 34).
- *Setting up key contacts* (on page 35).
- *Uploading documents* (on page 37).
- *Updating documents* (on page 38).
- *Customizing the InForm Portal colors* (on page 41).

About the Admin tab

Only the Configuration Administrator and Portal Administrators have rights to view the Admin tab. The options available on this page allow administrators to modify and define the contents of the InForm Portal application. The options that are available to a user are set by the Configuration Administrator.

For more information, see *User roles and rights for accessing the InForm Portal application* (on page 3) and *Assigning Portal Administrator rights* (on page 23).

Admin page options

The options on the Admin page are organized into three main sections.

Heading	Options
Add New Records	<ul style="list-style-type: none"> Add a new tab. <p>Note: Phase Forward recommends that this option be available only to the Configuration Administrator.</p> <ul style="list-style-type: none"> Add a new section to a tab. Upload a document. Format the page color.
Edit Records	<ul style="list-style-type: none"> Edit section names. Edit tab names. Rearrange the order of tabs. Update a document.

Working with tabs and sections

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

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

- One tab for white papers.
- One tab for key contacts.
- One tab for news.

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

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

- Understand the focus and information needs of the audience.
- Select the most appropriate tab.
- Organize the documents logically.
- Name the tabs, sections, and documents descriptively.

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

For more information, see:

- *Tab types and InForm Portal pages* (on page 19).
- *Considerations for working with tabs* (on page 21).
- *Adding a section to a tab* (on page 33).

Renaming a tab

- 1 In the InForm Portal application, select the **Admin** tab.
- 2 In the **Edit Records** section, click **Tabs**.
- 3 To the right of the tab name that you want to rename, click **Edit**.
- 4 Make your changes.
- 5 Click **Submit**.

Reordering tabs

- 1 In the InForm Portal application, select the **Admin** tab.
- 2 In the **Edit Records** section, click **Tab Order**.
 - To move the selected tab one place to the left, click **Move Up**.
 - To move the selected tab one place to the right, click **Move Down**.

The page adjusts to accommodate as many tabs as requested up to the maximum of 13 tabs.

Note: Make sure that all the tabs are visible when the page is at full view. There is no horizontal scroll bar on the page.

Adding a section to a tab

Section headings are categories specified on a document tab. Documents are added to sections on tabs. Before you can upload any documents to a tab, the tab must contain at least one section.

When creating a new section heading:

- Select the most appropriate tab.
- Organize documents logically.
- Name tabs, sections, and documents descriptively.

Note: Do not include spaces in section names.

- Consider the focus and information needs of the audience.

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

- 1 In the InForm Portal application, select the **Admin** tab.
- 2 In the **Add New Records** section, click **Sections**.
- 3 Complete the following fields:
 - **Title**—Name of the section.
 - **Description**—Information about the section that will appear next to the section title on the tab.
 - **Tab**—Tab to place the section on.
 - **Is This Section Visible?**—Whether the section and its contents will be visible to end users.
- 4 Click **Submit**.

Editing section properties

The Configuration Administrator or Portal Administrators with the appropriate rights can edit the properties of a section. For example, you can change the name or description of a section, or make a section visible when it is ready to be used.

- 1 In the InForm Portal application, select the **Admin** tab.
- 2 In the **Edit Records** section, click **Sections**.
The Edit Sections page appears.
- 3 To the right of the section that you want to edit, click **Edit**.
The section properties page appears.
- 4 Edit the fields as necessary.
- 5 Click **Submit**.

Note: The section title does not appear on the tab until a document has been uploaded to the section.

Activating or deactivating a tab

The Configuration Administrator or Portal Administrators with the right to edit tabs can activate (make visible) or deactivate (hide) tabs.

- 1 In the InForm Portal application, select the **Admin** tab.
- 2 In the **Edit Records** section, click **Tabs**.
- 3 Scroll to the tab you want to activate or deactivate.
- 4 To the right of the tab you want to edit, click **Edit**.
- 5 Do one of the following:
 - To activate the tab, select **Active**.
 - To deactivate the tab, deselect **Active**.
- 6 Click **Submit**.

Setting up key contacts

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

- 1 In the InForm navigation pane, select **Admin**.
- 2 Select the **Users** tab.
- 3 Select the user you want to designate as a key contact.
- 4 Verify that the phone number and email fields contain data.
- 5 To make a user appear on the **Contacts** page, in the **Description** field, type:
Public
- 6 Click **Submit**.
- 7 To add more contacts, repeat steps 2 to 6.

When you select the **Contacts** tab, the first name, last name, title, day phone number, and email address of each user appears in the key contacts table.

Managing documents

Before uploading a document

A tab must have at least one section before you can upload documents to it.

For more information, see *Creating and naming a tab* (on page 24) and *Adding a section to a tab* (on page 33).

Note: Before you upload any document, be sure to run it through a virus scanning program.

You can upload documents in any of the following formats:

- Microsoft Word/RTF or DOC.
- Adobe Acrobat Portable Document Format (PDF).
- Hypertext Markup Language (HTML).
- Microsoft PowerPoint.
- Microsoft Excel.
- Microsoft Project.
- GIF and JPG images.

Note: Documents in HTML, GIF, and JPG formats appear directly in the browser. The other file formats require separate viewers, which are available from Adobe (www.adobe.com) and Microsoft (www.microsoft.com).

Document property	Description
Tab	Name of the tab on which you will place the document.
Section	Name of the section on which you will place the document. Note: If the section does not exist, you must create it before you upload the document.
Document Title	Title that will appear on the InForm Portal tab. The title should be descriptive and should relate to InForm Portal users. Note: You can change this property at any time. For more information, see <i>Editing document properties</i> (on page 38).
Ref Name	Unique document identifier, up to 50 characters, that connects this document to all previous and subsequent versions of the document. The RefName is required in order to maintain the audit trail for the document. Note: The RefName for a document cannot be changed.

Document property	Description
Visibility to users Y/N	<p>Whether the document should be visible to the InForm Portal users when it is uploaded.</p> <p>Note: You can change this property at any time.</p> <p>For more information, see <i>Editing document properties</i> (on page 38).</p>
Sponsor only Y/N	<p>Whether the document should be viewed by all users, or only by sponsor users.</p> <p>Note: You can change this property at any time.</p> <p>For more information, see <i>Editing document properties</i> (on page 38).</p>
Format	<p>Format(s) for the document. Consider how your users will use the document and what software they have for:</p> <ul style="list-style-type: none"> • Downloading and editing—Make the document available in Microsoft Word, Microsoft PowerPoint, Microsoft Excel spreadsheet software, or Microsoft Project. • Downloading and printing—Make the document available in Adobe Acrobat (PDF). • Viewing online—Make the document available in HTML.

Uploading a document

- 1 In the InForm Portal application, select the **Admin** tab.
- 2 In the **Add New Records** section, click **Upload Document**.
The Document Uploading console appears.
- 3 Complete the following fields:

Note: You can upload the same document with up to three different file extensions at one time.

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

- **Title**—Title of the document.
- **Ref Name**—Unique identifier (up to 50 characters) that is used to maintain the document's audit trail.
- **Description**—Description of the document.
- **Select Tab**—Tab on which you want to put the document.

Note: Only tabs that have at least one section heading assigned to them appear on this drop-down menu.

- **Select Section**—Name of the section in which to add the document.

- **Is This Document Visible**—Whether the document will be visible to users.
- **Select Document**—Path of the document. Recommended file size is no larger than 3MB.

Note: For IIS 6.0, the maximum size of a file that can be uploaded to the InForm Portal application is set to 4 MB by default. For information on changing the default file size limit, see your Microsoft documentation.

- 4 To add more formats of the same document, repeat steps 2-3.
- 5 Click **Submit**.

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

Updating a document

You may update a document at any time. The InForm Portal application maintains an audit trail of the document history. For auditing purposes, documents are never deleted, but you can hide a document when you no longer want it available to users.

- 1 In the InForm Portal application, select the **Admin** tab.
- 2 In the **Edit Records** section, click **Update Documents**.
The Tab Name drop-down menu appears.
- 3 Select the tab where your document is located.
- 4 Click **Next**.
- 5 In the row associated with the selected document, click **Insert**.
The Document Console appears.
- 6 Complete the following fields:

Note: You can upload the same document with up to three different file extensions at one time.

- **Reason for Change**—Reason for making the change.
 - **Is This Document Visible**—Whether the document will be visible to users.
 - **Select Document**—Path of the document. Recommended file size is no larger than 3MB.
- 7 Click **Submit**.

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

Editing document properties

You can modify document properties such as title and description without updating and uploading the document again.

- 1 In the InForm Portal application, select the **Admin** tab.
- 2 In the **Edit Records** section, click **Update Documents**.

The Tab Name drop-down menu appears.

- 3 Select the tab where your document is located.
- 4 Click **Next**.
- 5 Click **Edit**.

The Document Uploading console appears.

- 6 Edit any of the document properties on the console except the RefName.
- 7 Click **Submit**.

Restricting the availability of a document to end users

Administrators may need to restrict the availability of a document for several reasons, including:

- A document is awaiting approval.
- A document is relevant only to the sponsor users and would have no significance to site users.

You can control access to published documents by:

- ***Making a document invisible*** (on page 40).
- ***Restricting document access to sponsor users*** (on page 40).

Making a document invisible

- 1 In the InForm Portal application, select the **Admin** tab.
- 2 In the **Add New Records** section, click **Upload Document**.
The Document Uploading console appears.
- 3 Complete all the fields.
- 4 In the **Is This Document Visible** field, select **No**.
- 5 Click **Submit**.

You can change whether a document is visible when you update the document.

For more information, see ***Updating a document*** (on page 38).

Restricting document access to sponsor users

You can limit the audience for a document by putting the document on a tab that is designated for sponsors only. When the tab is marked sponsor-only, the documents uploaded to the tab are visible only to users who are marked as sponsors in their InForm Basic User Records.

- 1 In the InForm Portal application, select the **Admin** tab.
- 2 In the **Edit Records** section, click **Tabs**.
- 3 To the right of the tab you want to edit, click **Edit**.
- 4 Select **Sponsor**.
- 5 Click **Submit**.

Customizing the InForm Portal colors

InForm Portal page colors

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

- **The left page bar**—Vertical bar of color that runs along the left edge of InForm Portal window.
- **The section bar**—Horizontal bar that provides background for the section headings on a tab.
- **The section text**—Color of the title text in the section heading.

Specifying colors

- 1 In the InForm Portal application, select the **Admin** tab.
- 2 In the **Add New Records** section, click **Format Page Color**.

The following color choice groups appear:

- Internet safe colors.
- Gray scale colors.
- Standard colors.

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

- 3 Select a color for the left page bar.
- 4 Click **Next**.
- 5 Select a color for the section bar.
- 6 Click **Next**.
- 7 Select a color for the section text.
- 8 Click **Next**.
- 9 To save the changes, click **Update**.
- 10 To see your color choices as they appear in the InForm Portal application, select any tab.