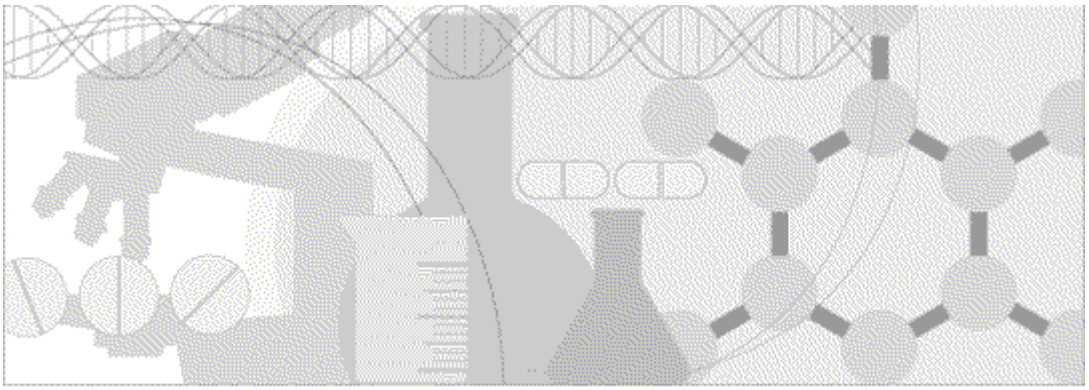
Upgrade and Migration Guide

Oracle® Health Sciences InForm 6.0.0.3



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About this guide

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Overview of this guide

The *Upgrade and Migration Guide* provides instructions for upgrading and migrating the InForm software and InForm Portal software to the current InForm release, and for upgrading the Cognos 8 Business Intelligence software for use with the Reporting and Analysis module. The guide also describes any changes and additions made to the database schema, MedML, and resource files.

Audience

This guide is for database and system administrators who are responsible for upgrading or migrating the InForm software and InForm Portal software to the current InForm release, and for upgrading the Cognos 8 Business Intelligence software for use with the Reporting and Analysis module.

Documentation

All documentation is available from the Oracle Software Delivery Cloud (https://edelivery.oracle.com) and the Download Center (https://extranet.phaseforward.com).

Document	Description
Release Notes	The *Release Notes* document describes enhancements introduced and problems fixed in the current release, upgrade considerations, release history, and other late-breaking information.
Known Issues	The *Known Issues* document provides detailed information about the known issues in this release, along with workarounds, if available.
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 8 Business Intelligence software for use with the Reporting and Analysis module. The guide also describes any changes and additions made to the database schema, MedML, and resource files.
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.
Installation Guide	The *Installation Guide* describes how to install the software and configure the environment for the InForm application and Cognos 8 Business Intelligence software.
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.
User Guide	The *User Guide* provides an overview of the InForm application including details on multilingual studies, how to navigate through the user interface, and how to use the application to accomplish typical tasks you perform while running a clinical study. This document is also available from the Documentation CD and the InForm user interface.
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 Ad Hoc Reporting feature, and describes the study management and clinical data packages available for Reporting and Analysis. It also provides detailed descriptions of each standard report that is included with your installation. This document is also available from the Documentation CD.
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).

Document	Description
Portal Administration 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. This document is also available from the Documentation CD.
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. This document is also available from the Documentation CD.
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.
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.
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.

If you need assistance

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

CHAPTER 1

Upgrading and migrating to the InForm 6.0.0.3 release

In this chapter

Overview of upgrading and migrating to this release 2

Requirements for the InForm studies you can migrate 3

Hardware and software requirements for the InForm 6.0.0.3 release 4

Overview of upgrading and migrating to this release

You can perform a new installation of the InForm 6.0.0.3 software, or you can upgrade and migrate to the InForm 6.0.0.3 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**—If you are upgrading to the InForm 6.0.0.3 release from an environment that uses the Oracle 10g database or Oracle 11g database software.

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

- **Migrate the InForm studies**—You can upgrade to the InForm 6.0.0.3 software from the InForm 4.6 SP2 release or later, any InForm 5.0, 5.5, or 6.0 release using a series of scripts.

  Alternatively, for InForm 6.0 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 to this release* (on page 7).

- **Upgrade the reporting environment**—Optional. This is required only if you are using the Reporting and Analysis module.

  Use this step to upgrade your reporting environment for any InForm 4.6 SP2 studies or later, any InForm 5.0, 5.5 studies, or 6.0 studies using a series of scripts.

  Alternatively, for InForm 6.0 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 reporting environment to this release* (on page 41).

- **Migrate the InForm Portal software**—Optional. This is required only if you are using the InForm Portal software.

  Use this step to upgrade or migrate the InForm Portal software for the InForm 6.0.0.3 release.

  For more information, see *Migrating the InForm Portal software* (on page 57).

Requirements for the InForm studies you can migrate

You can upgrade to the InForm 6.0.0.3 release from the InForm 4.6 SP2 release or later, any InForm 5.0, 5.5, or 6.0 releases.

For any InForm 4.6 SP2 release or later, or any InForm 5.0 or 5.5 study, you must create a new deployment package with a new study version in the Central Designer 2.0 application. For more information, see *Create a Central Designer 2.0 deployment package* (on page 22). This step is not required if you are upgrading from any InForm 6.0 release.

There are no limitations on upgrading or migrating studies from any InForm 5.0, 5.5, or 6.0 release.

However, 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 6.0.0.3 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 6.0.0.3 release

Before upgrading and migrating to the InForm 6.0.0.3 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 6.0.0.3 release from an environment that uses the Oracle 10g database software, you must upgrade to the Oracle 11g database software.

- For information on which versions of the Oracle database software are supported, see the *Release Notes*.
- For information on installing the Oracle 11g database software, see your Oracle database documentation.
- For information on the database parameter settings, and guidance on installing and configuring the Oracle database software for the InForm environment, see the *Installation Guide*.

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

CHAPTER 3

Upgrading and migrating the InForm studies to this release

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Preparing to upgrade or migrate the InForm software and studies 9

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Running an in-place upgrade of any InForm 6.0 release 36

Post-upgrade tasks 38

Upgrade to a new Oracle database environment

1 Create a new Oracle 11.2 database environment.

2 Create new study databases in the new Oracle 11.2 environment.

For more information, see your Oracle database documentation.

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 10).
- *Character set differences* (on page 10).
- *Query length limitations* (on page 11).
- *Oracle 11g database import recommendations* (on page 11).
- *Rights assigned to right groups* (on page 12).
- *Itemset types and migrated studies* (on page 12).
- *Imported child controls and migrated studies* (on page 12).
- *Changed resource files* (on page 13).

2 *Create backup files* (on page 18).

3 *Prepare the InForm 4.6 study database schema for backup* (on page 19).

4 Back up the InForm study database:

- *Back up the InForm 4.6 or 5.0 database and customized files—Oracle 10g* (on page 20).
- *Back up the InForm 4.6, 5.5, or 6.0 database and customized files—Oracle 11g* (on page 21).

5 *Record study, customer-defined database, and connection information* (on page 22).

6 *Create a Central Designer 2.0 deployment package* (on page 22).

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

Considerations before you migrate

Database and file customizations

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

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

- Any schema customization must have an upgrade path that results in a valid InForm 6.0 schema at the point in the migration where you create the review schema. For more information, see *Create new database objects for the review schema* (on page 29).

  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 6.0 software and InForm 6.0 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 6.0.0.3 release might cause issues with table column widths.

To prevent these issues, you must prepare the InForm 4.6 database schemas before you migrate.

For more information, see:

- *Prepare the InForm 4.6 study database schemas for backup* (on page 19).
- *Prepare the InForm 4.6 InForm Portal database schema for backup* (on page 58).

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 6.0.0.3 release.

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

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

Oracle 11g database import recommendations

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

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

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

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

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

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

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

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

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

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

Rights assigned to right groups

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

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

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

For more information, see *Verify the rights assigned to each rights group* (on page 39).

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 previous InForm releases behave as Add Entry itemsets in the InForm 6.0.0.3 release.

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

Imported child controls and migrated studies

In the InForm 6.0.0.3 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 6.0.0.3 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.

Files updated in InForm release 6.0.0.3

...\XMLBase

sysVolume.xml

...\XMLBase\Help

Version.htm

Files updated in InForm release 6.0.0.2

...\XMLBase

sysVolume.xml

...\XMLBase\Help

Version.htm

Files updated in InForm release 6.0

...\Resource_UI

AdvadedFilterSupport.html

Calendar.js

ContextMenuFrame.html

ControlPanelNoFrame.html

CRFFrame.html

DetailFrame.html

EQACFrame.html

EQACQueryFrame.html

FORGOTPWD.HTML

FORGOTPWDCORRECT.HTML

formhelper.js

Login.css

Login.html

mainstyle.css

MonitorFrame.html

MultiPage.html

Pfscript.js

QueryListFrame.html

Reauth.html

Resetpwdnotification.txt

Resource_auth_template.xml

Resources_template.xml

ScreeningListFrame.html

ScreeningLog.html

SDVListTileBody.html

SDVTitleNoFrame.html

SignPage.html

SSORedirect.html

TabControlframe.html

Top_Reauth.js

TopFrameset.html

TopWindowClose.html

VisitBar.css

VisitBarScript.js

Visitcalculator.html

...\XMLBase

Clintrial_Users.xml

core_ReprtingUser.xml

core_Rights.xml

core_RightsGroups.xml

core_SystemConfig.xml

core_SystemConfigThing.xml

core_Users.xml

core_UsersType.xml

Default_RightsGroups.xml

Defaults.rsp

syscore.rsp

sysform_AdminUserNew.xml

sysform_DefaultConnectionSettings.xml

sysform_Password.xml

sysform_RightsEdit.xml

sysform_SystemConfig.xml

sysform_SystemInfo.xml

sysform_UserType.xml

sysVolume.xml

sysVolume.xmltmpl

upgradeAdminConfigAttributes.xml

UpgradeTrialResources.rsp

New files in InForm release 6.0

...\Resource_UI

ExternalLoginWindowClose.html

ItemsetRowCommentFormFrameset.html

ItemsetRowCommentInterFrameset.html

ReauthenticationWindow.html

Top_Reauth_Trust.js

...\XMLBase

sysform_ItemsetRowComment.xml

UAUM_Users.xml

UpgradePFReportingUser.xml

Files removed in InForm release 6.0

...\Resource_UI

ArchitectCRFFrameset.html

ArchitectCRFFrameset2.html

ArchitectCRFTitle.html

ArchitectCRFTitleRepeating.html

ArchitectFrameset.html

ArchitectItemSetFrameset.html

GenericFrame2Panels.html

ListingsTitle.html

LIVECHECKBOX.HTML

LIVERADIOBUTTON.HTML

NOEDITCHECKBOX.HTML

NOEDITRADIOBUTTON.HTML

PRINTCHECKBOX.HTML

PRINTRADIOBUTTON.HTML

VERTDEEPLIVECHECKBOX.HTML

VERTDEEPLIVERADIOBUTTON.HTML

VERTDEEPNOEDITCHECKBOX.HTML

VERTDEEPNOEDITRADIOBUTTON.HTML

VERTDEEPPRINTCHECKBOX.HTML

VERTDEEPPRINTRADIOBUTTON.HTML

VERTLIVECHECKBOX.HTML

VERTLIVERADIOBUTTON.HTML

VERTNOEDITCHECKBOX.HTML

VERTNOEDITRADIOBUTTON.HTML

VERTPRINTCHECKBOX.HTML

VERTPRINTRADIOBUTTON.HTML

...\XMLBase

core_MercRightsGroups.xml

core_MercUsers.xml

Default_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 10).

3 If you are using the Reporting and Analysis module or if you made any customizations, you must record or export the registry values.

- For InForm 4.6, 5.0. or 5.5 releases, record the current the registry values in the **HKEY_LOCAL_MACHINE\SOFTWARE\Phase Forward\AuthenticationFilter** key so you can edit the registry on the new server to apply your customized settings.
- For InForm 6.0 releases, export the registry values in the **HKEY_LOCAL_MACHINE\SOFTWARE\OracleHS\AuthenticationFilter** key so you can import the values into the registry on the new server.

You will use this information when you restore the Windows registry settings, which is part of the migration process. For more information, see ***Restore the Windows registry settings*** (on page 35).

4 Back up all of the files for each study.

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

5 If you are upgrading from an InForm 4.6, 5.0, or 5.5 release, back up the study CSML file located in the <*InstallationDirectory*>\InForm\Trials folder.

You can use this file to create a new deployment package in the Central Designer 2.0 application. The CSML file uses this naming convention:

<*StudyName*>_<*StudyVersion*>.csml (for example, pfst55_0.0.2.csml).

For more information, see ***Create a Central Designer 2.0 deployment package*** (on page 22).

6 If you are upgrading from an InForm 6.0 release, create a backup of the Central Designer rule engines.

The rule engine for studies that are created in the Central Designer application is saved in the <*InstallationDirectory*>\InForm\Bin\DesignerVersion<*Version_Number*> folder.

- To create a backup, copy all the files in every DesignerVersion<V*ersion_Number*> folder to another location.

  These folders include the Central Designer rule engine, external functions, COM interoperability libraries, and configuration files.

7 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.

Prepare the InForm 4.6 study database schema for backup

If you are migrating an InForm 4.6 study, you must prepare the InForm 4.6 study database schema for backup before migrating to the InForm 6.0.0.3 release.

Note: Character set differences between the InForm 4.6 release and the InForm 6.0.0.3 release might cause issues with table column widths. Perform this step to prevent these issues.

1 Copy the InForm\InstallSupport folder from the downloaded ISO image to the InForm 4.6 application server.

2 Run **UpgradeTrialSchema.cmd** (located in the InForm\InstallSupport folder) on the InForm 4.6 application server to prepare the InForm 4.6 study schemas for backup, using the following syntax:

```
UpgradeTrialSchema.cmd <TNS_Service_Name>
```

where:

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

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 database schema.
- **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.

The UpgradeTrialSchema command creates a log file **Install_upgrade_log_<current-date>_<current-time>.txt** in the current directory.

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.

Back up the InForm study database

Back up the InForm 4.6 or 5.0 database and customized files—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 6.0.0.3 release. For more information, see *Import the DMP files* (on page 25).

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

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

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

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

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
```

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

Back up the InForm 4.6, 5.5, or 6.0 database and customized files—Oracle 11g

If you are migrating an InForm 4.6, 5.5, or 6.0 study from an Oracle 11g database, backing up the InForm study database is required. You will import the DMP file you create in this step during the migration to the InForm 6.0.0.3 release. For more information, see *Import the DMP files* (on page 25).

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

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

2 Run **ExportDB.cmd** (located in the InForm\InstallSupport 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**.

Record study, customer-defined database, and connection information

1 Run the pfadmin command using the following syntax:

```
pfadmin view service
```

2 Record the following information for each server and study:

- Study name, UID and PID.
- CDD DSN, UID and PID.

3 Record the database connection information.

Create a Central Designer 2.0 deployment package

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

The InForm 6.0.0.3 software is a 64-bit application. It cannot use the existing 32-bit Central Designer rules engine from any InForm 4.6 5.0, or 5.5 release. If you are upgrading from any of these releases, you must create a new deployment package for each study in the Central Designer 2.0 application.

You can create the deployment package two ways:

- From the Central Designer project that corresponds to the deployed version of the study you plan to migrate to the InForm 6.0.0.3 application.
- Create the deployment package from the CSML file for the study you plan to migrate to the InForm 6.0.0.3 application.

  The CSML file for a study is located in the <*Installation_Directory*>\InForm\Trials\<*StudyName*>\<*StudyName*>_<*StudyVersion*>.csml

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

Note: During creation of the package make sure all the languages in the original study are selected.

Migrating InForm studies to a new machine

You can migrate any InForm 4.6, 5.0, 5.5, or 6.0 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 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 for any InForm 6.0 release* (on page 36).

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

1 *Install the InForm 6.0.0.3 software* (on page 24).

2 *Create the database user* (on page 24).

3 *Create tablespaces other than INFORM* (on page 25).

4 Import the DMP files.

- *Import the InForm 4.6 or InForm 5.0 DMP files—Oracle 10g* (on page 25).
- *Import the InForm 4.6, 5.5, or 6.0 DMP files—Oracle 11g* (on page 26).

5 *Grant the database user privileges* (on page 27).

6 *Set up the InForm servers, studies, and customer-defined databases* (on page 27).

7 *Upgrade the study schemas to the InForm 6.0.0.3 release* (on page 28).

8 *Update the statistics for the InForm studies* (on page 29).

9 *Start the InForm server* (on page 29).

10 *Create new database objects for the review schema* (on page 29).

11 *Set the MEDMLINSTALLER server* (on page 30).

12 *Restore the Central Designer rule engines to the original location* (on page 30).

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

13 *Run the 64-bit Central Designer deployment package* (on page 31).

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

14 *Upgrade the study resources* (on page 31).

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

15 *Terminate obsolete users* (on page 32).

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

16 *Set the locale for InForm 4.6 sites and users* (on page 33).

17 *Delete PF_PATH table records* (on page 34).

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

18 *Perform the final study configuration* (on page 34).

19 *Restore the Windows registry settings* (on page 35).

20 *Install or upgrade the InForm Adapter software* (on page 35).

21 *Start the InForm studies* (on page 35).

Install the InForm 6.0.0.3 software

Note: Before you install the InForm 6.0.0.3 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, as described in the *Installation Guide*.

  On the Database Configuration page:

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

Create the database user

- Run **DropDB.cmd** (located in the <*Installation_Directory*>\InForm\Bin\DBOra folder) to create the database user, using following syntax:

  ```
  DropDB.cmd <TNS_Service_Name>
  ```

  where:

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

  You are prompted for the following values:

  - **pfdbauid**—InForm database admin user.
  - **pfdbapid**—Password for the InForm database admin 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:

  ```
  DropDB.cmd TRIAL1
  ```

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

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 DMP files

Import the InForm 4.6 or InForm 5.0 DMP files—Oracle 10g

Before importing the DMP files, see:

- *Database and file customizations* (on page 10).
- *Oracle 11g database import recommendations* (on page 11).

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.

- If you are migrating an InForm 4.6 or InForm 5.0 study from an Oracle 10g database, run **ImportDBUpgrade.cmd** (located in the <*InstallationDirectory*>\InForm\Bin\DBOra folder) to import the studies from the study schema DMP files, using the following syntax:

  ```
  ImportDBUpgrade.cmd <DMP_file> <TNS_Service_Name> <From_Trial_UserID>
  <To_Trial_UserID>
  ```

  where:

  - **DMP_file**—Name of the file containing the study backup.
  - **TNS_Service_Name**—TNS name for the database instance.
  - **From_Trial_UserID**—Owner of the database schema being migrated.
  - **To_Trial_UserID**—Owner of the study schema created by the import.

  You are prompted for the following values:

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

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

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

  Example:

  ```
  ImportDBUpgrade.cmd D:\PFST46.dmp TRIAL1 PFST46UID PFST46UID
  ```

The ImportDBUpgrade command creates a log file **<DMP_file>.log** (for example, pfst46.log).

Note: Disregard import errors regarding the database link and the proxy user. These errors only appear if the study that you have exported included the Reporting and Analysis module. In addition, disregard import errors regarding rule triggers. Rule triggers are refreshed during the study schema update.

Import the InForm 4.6, 5.5, or 6.0 DMP files—Oracle 11g

Before importing the DMP files, see:

- *Database and file customizations* (on page 10).
- *Oracle 11g database import recommendations* (on page 11).

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.

- If you are migrating an InForm 4.6, 5.5, or 6.0 study from an Oracle 11g database, 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**.

Grant the database user privileges

- Run **GrantAccess.sql** (located in the <*Installation_Directory*>\InForm\Bin\DBOra folder) using the following syntax:

  ```
  sqlplus <pfdbauid>@<trial_instance> @GrantAccess.sql <trial_userid>
  ```

  where:

  - **trial_userid**—The name of the database user.

  When prompted, enter the InForm database admin user password.

  For example:

  ```
  sqlplus infadmin@trial1 @GrantAccess.sql PFST46UID
  ```

Set up the InForm servers, studies, and customer-defined databases

1 To define each server, use the following command and syntax:

  ```
  PFADMIN SETUP SERVER <servername>
  ```

2 To define each study, use the following command and syntax:

  ```
  PFADMIN SETUP TRIAL <trialname> <servername> /db <oracle_connect_string>
  ```

  where:

  - **trialname**—Name of the study you are defining.
  - **servername**—Name of the server on which the study is located.
  - **oracle_connect_string**—String that the InForm server uses to connect to the Oracle Instance for the study.

  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.

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

  ```
  PFADMIN SETUP CDD <Refname> <trialname> /db <oracle_connect_string> <DSN>
  [NoSchema]
  ```

  where:

  - **RefName**—RefName of the CDD.
  - **trialname**—Name of the study you are defining.
  - **oracle_connect_string**—String that the InForm server uses to connect to the Oracle Instance for the study.

- **DSN**—Data Source Name of the CDD.
- **[NoSchema]**—Indicates that no new CDD schema should be created during setup.

You are prompted for the following values:

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

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

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

Upgrade the study schemas to the InForm 6.0.0.3 release

The UpgradeTrialSchema command upgrades studies from the InForm 4.6 SP2 release and later, all InForm 5.0, 5.5, and 6.0 releases to the InForm 6.0.0.3 release. The command terminates if the InForm release is different from these releases.

- Run **UpgradeTrialSchema.cmd** (located in the <*InstallationDirectory*>\InForm\Bin\DBOra folder) on the InForm 6.0.0.3 application server to upgrade each study schema to the InForm 6.0.0.3 release, using the following syntax:

  ```
  UpgradeTrialSchema.cmd <TNS_Service_Name>
  ```

  where:

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

  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 database schema.
  - **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:

  ```
  UpgradeTrialSchema.cmd TRIAL1
  ```

  The UpgradeTrialSchema command creates a log file **Install_upgrade_log_<current-date>_<current-time>.txt** in the current directory.

Update the statistics for the InForm studies

- Run **updatec.sql** for each study, using the following command and syntax:

  SQLPLUS <*pfdb_admin*>**@**<*trial_instance*> **@updatec.sql** <*trialuserid*>

  When prompted, enter the password for the InForm database administrator.

Start the InForm server

- Start the InForm server for the studies, using the following command:

  PFADMIN START SERVER <*servername*>

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 10).

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.

    For InForm 4.6 studies, you must use en-US as the <*StudyLocale_ISO_name*>.

    For InForm 5.0, 5.5, and 6.0 studies you can pick any of the supported Study Locales.

The pfadmin RECREATEREVIEWSCHEMA command creates the following log files in the <*InstallationDirectory*>\InForm\Bin\DBOra\ReviewSchema folder:

- Install_ Clinical_<trialname>_<currentdate>_<currenttime>.txt
- Install_ Fixed_<trialname>_<currentdate>_<currenttime>.txt

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.

Set the MEDMLINSTALLER server

You must set the MEDMLINSTALLER to the current server in order to install the new resources.

The study must be in Design mode before running the commands.

1 Start each study in Design mode, using the following command and syntax:

```
PFADMIN START TRIAL <trialname> /DESIGN
```

2 Set the MEDMLINSTALLER machine for each study, using the following commands and syntax:

```
PFADMIN SETSERVER MEDMLINSTALLER <trialname> <computername>

PFADMIN SETSERVER SITE <trialname> <computername>
```

where:

- **computername**—The unqualified name of the host machine.

Restore the Central Designer rule engines to the original location

1 Copy the DesignerVersion<version number> folder or folders you backed up to the InForm installation directory <InstallationDirectory>/InForm/bin.

2 Register the Central Designer rule engine DLL for each DesignerVersion<version_number> folder that you copied.

a Check on your system for the location of the latest copy of RegAsm.exe.

For the Central Designer version 2 rule engine—RegAsm.exe, version 4.0.30319, typically located at: **C:\WINDOWS\Microsoft.NET\Framework\v4.0.30319**.

b For each DesignerVersion2.*x.xx.x* folder that you restore, execute the following command, all on one command line:

```
C:\Windows\Microsoft.NET\Framework\v4.0.30319\RegAsm.exe /codebase
<InstallationDirectory>\InForm\bin\DesignerVersion<version
_number>\Oracle.Designer.InFormRuleEngine.dll
```

where:

- **InstallationDirectory**—The directory in which the InForm software is installed.
- **DesignerVersion<version_number>**—The name of each DesignerVersion folder that you copied from the bin folder.

Note: The **/codebase** flag is required. If you run RegAsm without the codebase flag, the rule engine registers, but rules do not run properly in the study. This prevents the enrollment of new subjects and the submission of some forms.

3 Restore the files contained in the folder <*InstallationDirectory*>**\InForm\Trials\<***trial_name***>**.

Run the 64-bit Central Designer deployment package

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

- Run the Central Designer deployment package wizard created in the Central Designer 2.0 application, and supply the following information for the study:
  - InForm server.
  - Study name.
  - Study database schema owner name and password.
  - Study database connection string or study DSN.

Note: You may encounter one or more **Element already exists - elements cannot be changed** errors when you try to deploy an InForm 4.6 study to the InForm 6.0.0.3 application. For a workaround, contact Global Customer Support.

Upgrade the study resources

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

1 Run **UpgradeResources.cmd** (located in the <*InstallationDirectory*>\InForm\Bin\DBOra folder) to upgrade the resources and the XMLBase changes for each study, using the following syntax:

```
UpgradeResources.cmd <trialname> <InForm_version_upgraded_from> [SILENT]
```

where:

- **InForm_version_upgraded_from**—4.6, 5.0, or 5.5.
- **[SILENT]**—Option that suppresses parameters that are normally supplied interactively with the command.

2 During the upgrade process from the InForm 4.6 release, you are asked if you want to change the System Config QueryMaxLength parameter to 350 characters.

- Type **Y** and press ENTER to change the value.

  If you used the SILENT option when you ran the command, the QueryMaxLength is changed automatically.

The product locale and study locale of the system user are set to en-US if they do not already exist.

Terminate obsolete users

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

- Run the following command to terminate built-in system users and remove invalid email addresses:

  TerminateUsers.cmd *<TNS_Service_Name> <trialname>*

  where:

  - **TNS_Service_Name**—TNS name for the database instance.
  - **trialname**—Name of the study.

  You are prompted for the following values:

  - **trial_user**—Owner of the study database schema.
  - **trial_user_password**—Password for 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:

  ```
  TerminateUsers.cmd trial1 pfst55
  ```

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 6.0.0.3 release.

InForm 5.0, 5.5, and 6.0 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 6.0.0.3 release, these properties must be added to existing sites and users.

1 Run **PFInFormMigrate.cmd** (located in the <*InstallationDirectory*>\InForm\Bin folder) to associate English locale attributes to sites and users, and to create the Upgrade MedML file UpgradeSitesAndUsers.xml, using the following syntax:

```
PFInFormMigrate <TNS_Service_Name>
```

where:

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

You are prompted for the following values:

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

```
PFInFormMigrate TRIAL1
```

The Upgrade MedML file UpgradeSitesAndUsers.xml is created in the <*InstallationDirectory*>\InForm\XMLBase folder.

2 Open the **UpgradeSitesAndUsers.xml** file you created in step 1, 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.

3 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.

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

5 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 sample 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).

Delete PF_PATH table records

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

For an upgraded study, the PF_PATH table in the study schema may include records that are not required by the InForm 6.0.0.3 software. These records may cause unpredictable results. The following commands delete all the records from the PF_Path table so they can be repopulated when the study restarts:

1 Stop the study.

```
pfadmin stop trial <trialname>
```

2 Run the clearcontrolpaths.sql script (located in the <Installation_Directory\InForm\Bun\DBOra folder) using the following syntax:

```
sqlplus <trial_userid>@<TNS_Service_Name>@clearcontrolpaths.sql
```

When prompted, enter the password for the study user.

where:

- **trial_userid**—Owner of the study database schema.
- **TNS_Service_Name**—TNS name for the database instance.

Example:

```
sqlplus pfst60uid@trial1@clearcontrolpaths.sql
```

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*.

Restore the Windows registry settings

1 Restore the Windows registry settings that you recorded or exported when you created the backup files to the new registry key **HKEY_LOCAL_MACHINE\SOFTWARE\OracleHS\AuthenticationFilter**.

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

- For InForm 4.6, 5.0. or 5.5 releases, add the registry values that you recorded from the **HKEY_LOCAL_MACHINE\SOFTWARE\Phase Forward\AuthenticationFilter** key.
- For InForm 6.0 releases, import the registry values that you exported from the **HKEY_LOCAL_MACHINE\SOFTWARE\OracleHS\AuthenticationFilter** key.

2 Restart IIS.

Install or upgrade the InForm Adapter software

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

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

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

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

Start the InForm studies

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

```
PFADMIN START TRIAL <trialname>
```

Running an in-place upgrade of any InForm 6.0 release

Use the following steps to run an in-place upgrade of any InForm 6.0 studies and the reporting environment.

1 Download the InForm 6.0.0.3 ISO file and extract the contents to a location on the InForm application server.

2 Open a Command Prompt window.

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

```
PFADMIN STOP TRIAL <studyname>

PFADMIN STOP SERVER <servername>
```

4 Stop all InForm applications and integrations that require the InForm service, for example, the Central Coding application.

5 Stop the InForm service.

6 Back up the following:

- The contents of the <Installation_Directory>\InForm folder.
- All of the files for each study.

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

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

> **Note:** Some of these values are reset to their defaults when you re-install the InForm software or when you run the in-place upgrade.

8 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.

9 Follow the prompts to run the wizard.

Running the wizard upgrades the core InForm software.

- If you are not using Reporting, the upgrade is complete. Proceed to Step 11.
- If you are using Reporting, proceed to Step 10.

10 Copy **Op package and reports 6_0_0_3.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.

> **Note:** This step upgrades your Reporting environment.

11 Restore the HKEY_LOCAL_MACHINE\SOFTWARE\OracleHS registry settings from the file you exported in Step 7.

12 Start the InForm service.

13 Start the installed studies and servers, by typing the following commands in the order listed.

```
PFADMIN START SERVER <servername>

PFADMIN START TRIAL <studyname>
```

Post-upgrade tasks

Clear the client-side browser caches

Clear the Internet Explorer 7.0 browser cache

1 Select **Tools** > **Internet Options**.

2 In the **Browsing history** section of the **General** tab, click **Delete.**

The Delete Browsing History dialog box appears.

3 Click **Delete Files**.

A confirmation dialog box appears.

4 Click **Yes.**

5 Click **Delete Cookies**.

A confirmation dialog box appears.

6 Click **Yes**.

7 Click **Close**.

8 Click **OK**.

Clear the Internet Explorer 8.0 or 9.0 browser cache

1 Select **Tools** > **Internet Options**.

2 In the **Browsing history** section of the **General** tab, click **Delete**.

3 Deselect **Preserve Favorites website data**.

4 Select **Temporary Internet Files**.

5 Select **Cookies**.

6 Click **Delete**.

7 Click **OK**.

Clear the Apple Safari 5.1 browser cache

1 Select **Safari > Empty cache**.

2 Click **Empty**.

Clear the Firefox 3.6 or 11.0 browser cache

1 Select **Tools** > **Clear Recent History**.

The Time range to clear window appears.

2 From the drop-down list, select **Everything**.

3 In the **Details** list, select **Cache**.

4 Click **Clear Now**.

Clear the Chrome 19 browser cache

1 Select **Settings** >**Tools** > **Clear browsing data**.

Clear browsing data window appears

2 From the Clear the following items from: drop-down list, select **clear from beginning of time**.

3 Select all the items in the list.

4 Click **Clear browsing data**.

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, any InForm 5.5 release, or any InForm 6.0 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 12) and the *User Guide*.

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

Reset your password

When you log in to the InForm application for the first time after upgrading to the InForm 6.0.0.3 release you are required to reset your password so that you can select the security questions required by the password reset functionality.

Note: This step is not required if you are upgrading from the InForm 4.6.4 release or any InForm 6.0 release.

To log in to the InForm application:

1 Open an Internet browser.

2 Type the URL for your study, and press Enter.

The Change Expired Password page appears. In addition to the user name, password, and email address fields, this page displays:

- Two drop-down lists from which you select a security question.

  There are four pre-defined security questions to choose from. You cannot modify or change the questions.

  - What is your mother's maiden name?
  - What is the name of your pet?
  - What is the city of your birth?
  - What is your favorite color?

- Two text boxes in which you enter the answers for the selected security questions.

  You must provide answers to both questions. The answers are case-insensitive. Leading and trailing spaces are ignored.

For more information, see the *User Guide*.

CHAPTER 4

Upgrading and migrating the reporting environment to this release

In this chapter

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Migrating the reporting environment to a new machine

You can migrate the reporting environment for any InForm 4.6, 5.0, 5.5, or 6.0 study to a new machine.

- Oracle does not support an in-place upgrade for any InForm 4.6, InForm 5.0, or InForm 5.5 release.

  You must install a new Cognos 8.4.1 64-bit environment, and create, export, and then import your export packages.

- For InForm 6.0 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 of an InForm 6.0 reporting environment* (on page 56).

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

1 *Install and configure the Cognos 8.4.1 environment* (on page 43).

   a *Install and customize the Cognos 8.4.1 software* (on page 43).

   b *Identify or create the required users for any InForm 4.6, InForm 5.0, or InForm 5.5 study* (on page 44).

2 *Create an export package and export the data from your Cognos environment* (on page 45).

   a Review *About the export package* (on page 45).

   b *Create an export package for each study in the Cognos 8.2 environment or the Cognos 8.4 environment* (on page 45).

3 *Create the streams between the InForm study schema and the Reporting schema, and install the Reporting schema* (on page 47).

4 *Import the export package* (on page 48).

5 *Run the PFCognosConfig utility* (on page 52).

6 *Modify the PFRSetupTrial.xml file* (on page 52).

7 *Run PFRInit on the InForm application server* (on page 53).

8 *Delete obsolete reports* (on page 53).

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

9 *Associate custom reports with the new operational packages* (on page 54).

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

10 *Restart the InForm Model Updater service* (on page 54).

11 *Revalidate custom reports* (on page 55).

12 *Update schedules and jobs* (on page 55).

13 *Delete the study organizational units from the LDAP configuration* (on page 55).

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

Install and configure the Cognos 8.4.1 environment

Install and customize the Cognos 8.4.1 software

1 Install the Cognos 8.4.1 64-bit software on the Cognos servers.

Note: For information on how to install and customize the Cognos 8.4.1 software, see the *Installation Guide.*

2 Install Fix Pack 4 (FP4) for the Cognos 8.4.1 software.

3 Install the Cognos hotsites in this order:

a up_c8bisrvr_win64_8.4.105.1076

b up_c8bisrvr_win64_8.4.105.1100

c up_c8bisrvr_win64_8.4.107.1013

4 Customize the Cognos 8.4.1 software on the Cognos servers.

a Run the Cognos 8 Customization for InForm wizard (CRNConfig) on all Report and Content Manager servers.

b Run the Cognos 8 Gateway Customization for InForm wizard (CRNGatewayConfig) on all Gateway servers.

c Start the Cognos 8 Business Intelligence servers.

Identify or create the required users for any InForm 4.6, 5.0, 5.5, or 6.0 study

Before you start the Cognos 8.4.1 upgrade, make sure that the following users exist so that you can log in to the Cognos 8 Business Intelligence 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.

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 6.0.0.3 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 8.4 environment after you install the InForm 6.0.0.3 software and the Cognos 8.4 software.

Because the current Cognos environment remains intact until the Cognos 8.4 environment is active, there is no need to back up any files on the Cognos server except for the export packages.

Create an export package for each study in the Cognos 8.2 environment or the Cognos 8.4 environment

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

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

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

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

2 Click **Reports**.

3 Select **Tools** > **Logon** to log in to the Cognos 8 Business Intelligence 8.2 or 8.4 server as a System Administrator.

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

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

6 For Cognos 8.2:

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

For Cognos 8.4:

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, Select Add to before you can select the packages you want to include.

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

Section	Option	Setting
Public folders content page		
Public folders content section	Disable after import	Selected for the study folder, the operational package, and the clinical package
Options section	Include report output version	Selected
	Include run history	Selected
	Include schedules	Selected
Directory content page		
Directory content	Include Cognos groups and roles	Deselected
	Include distribution lists and connections	Deselected
	Include data sources and connections	Deselected
General options page		
Access permissions	Include access permissions	Deselected
External namespaces	Do not include references to external namespaces	Selected
Entry ownership	Set the owner to	The user performing the import
	Apply to	New entries only

13 Click **Next**.

14 On the **Specify a deployment archive** page, click **Next**.

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

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

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

18 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.

19 Click **Close**.

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

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

1 Configure **configdiffdb.sql**.

For more information, see the *Installation Guide*.

2 Re-apply any customizations.

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

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

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

3 Open a Command Prompt window.

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

5 Run **configandcheckdiffdb**

For more information, see the *Installation Guide*.

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

For more information, see the *Installation Guide*.

Import the export package

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

Use this command to migrate your export package into the InForm 6.0.0.3 environment.

Running 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 8 BI server.

  This Cognos 8 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 Admin > System Configuration page of the InForm application.
- Name of the deployment package containing the reporting content you want to import into the Reporting server.
- Password for the deployment package.

Note: You can also pass the system administrator namespace, user name, dispatcher URL, and deployment package name in a parameter file. For more information, see ***ImportUtility*** **(on page 49)**.

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 ***ImportUtility*** (on page 49).

ImportUtility

Purpose

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

Location

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

Usage

ImportUtility [-all | -import | -nopwd | -pfmtr] ["path_to_parameter_file"]

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

Option	Parameter
-import	• Creates a secure staging folder on the Reporting server accessible to system administrators. The name of the staging folder is SecureImport_<*timestamp*>. • Creates the import specification object on the Reporting server accessible to system administrators. • Imports the content from a password-protected deployment package to the SecureImport_<*timestamp*>. • Deletes the import specification object.
-nopwd	• Creates a secure staging folder on the Reporting server accessible to system administrators. The name of the staging folder is SecureImport_<*timestamp*>. • Creates the import specification object on the Reporting server accessible to system administrators. • Imports the deployment package content to the SecureImport_<*timestamp*> folder and makes it accessible only to system administrators. • Copies the imported content to the Public folders on the Reporting server. • Deletes the SecureImport_<*timestamp*> folder, all its content, and the import specification object.
-pfmtr	• Creates a secure staging folder on the Reporting server accessible to system administrators. The name of the staging folder is SecureImport_<*timestamp*>. • Creates the import specification object on the Reporting server accessible to system administrators. • Imports the content to the SecureImport_<*timestamp*> folder. • Deletes the import specification object.
path_to_parameter_file	• When specified, includes the path to a text file that contains the parameters required to run the command. • You will always be prompted to enter required passwords on the command line. • If the parameter file is not specified, the command prompts for the required parameters. • The format of the parameter file is parameter=value. There is a new line for each parameter, and there are no spaces on a line.

Command line prompts

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

- **sysadmin_namespace**—Cognos system administrator user namespace.
- **sysadmin_uid**—User name for the Cognos system administrator.
- **sysadmin_pass**—Cognos system administrator password.
- **dispatcher_url**—Internal URI that the InForm server uses to communicate with the Cognos 8 BI server.

  This Cognos 8 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 Admin > System Configuration page of the InForm application. For example, http://example.com:9300/p2pd/servlet/dispatch.
- **archive_name**—Name of the deployment package containing the reporting content you want to import into the Reporting server.
- **archive_pass**—Password for the deployment package.

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

Parameter file contents

The following parameters may be passed to the ImportUtility command in a parameter file.

- sysadmin_namespace=Cognos system administrator user namespace.
- sysadmin_uid=User name for the Cognos system administrator.
- dispatcher_url=Internal URI that the InForm server uses to communicate with the Cognos 8 BI server.
- archive_name=Name of the deployment package containing the reporting content you want to import into the Reporting server.

Notes

- The **-import** and **-pfmtr** command options should be used to stage custom reports before distributing them to multiple studies.

  To move the content from the staging folder to the study folders and set study-specific permissions, use the **pfmtrsetuputil** command.
- The **-nopwd** and **-pfmtr** command options are used when you are importing a deployment package that is not password protected.

  These options should be used only when there is no clinical data present in the deployment package.

Example

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

Run the PFCognosConfig utility

Run the PFCognosConfig utility (located in the <*InstallationDirectory*>\InForm\bin folder) on the InForm 6.0.0.3 application server to configure an InForm study to work with the Cognos 8 Business Intelligence application. For more information, see the *Installation Guide*.

Modify the PFRSetupTrial.xml file

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

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

ReportsUpgrade is a tag that triggers the reporting specification upgrade.

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

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

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

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

- **sysadmin_namespace**—Oracle Directory Server admin namespace.
- **sysadmin_uid**—User name for the Oracle Directory Server admin namespace.
- **sysadmin_pass**—Password you chose when creating the Oracle Directory Server admin namespace user.
- **publisher_namespace**—Custom Authentication Provider (CAP) namespace.
- **publisher_uid**—InForm study user who is a member of the Publisher and Sponsor Users (or Site Users) Reporting groups.
- **publisher_pass**—Password of the InForm study user.
- **dispatcher_url**—Internal URI that the InForm server uses to communicate with the Cognos 8 BI server.
- **trial_name**—Name of the InForm study.
- **reportdb_pass**—Password for the reporting schema user.

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

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

Run PFRInit on the InForm application server

- Run the PFRInit command from the <*InstallationDirectory*>\InForm\Bin folder.

  For more information, see the *Installation Guide*.

The PFRInit command:

- Creates a new operational package called **<*studyname*> InForm Trial Management** in the Public Folders.

  This package contains any new features.
- Upgrades the specifications of standard reports in the trial folder.

  It upgrades only standard reports that are part of this release.
- Sets permissions on the trial folder and packages for a specific study.

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

Delete obsolete reports

If you are migrating from an InForm 4.6 release, manually delete the following obsolete reports from the study folder:

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

Associate custom reports with the new operational packages

If you are migrating from the InForm 4.6 release:

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 6.0.0.3 **<***studyname***> InForm Trial Management**.

For each report:

a Log in to an InForm study as a user who has the Reporting 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 8 Business Intelligence 8.4.1 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

- Stop and start the **InForm Model Updater** service to force the immediate clinical model generation.

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 Enable the <*studyname*> clinical package and study folder.

   On the **Properties** page of the clinical package and study folder, deselect **Disable this entry**.

3 Stop and start the **InForm Model Updater** service to force the immediate clinical model generation.

4 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.**

5 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 release.

LDAP is not used to authenticate study users in the InForm 6.0.0.3 release.

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

Running an in-place upgrade of an InForm 6.0 reporting environment

For information on running an in-place upgrade of any InForm 6.0 Reporting environment, see step 10 in *Performing an in-place upgrade for any InForm 6.0 release* (on page 36).

CHAPTER 5

Migrating the InForm Portal software

In this chapter

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Prepare the InForm Portal 4.6 database schema for backup

If you are migrating an InForm 4.6 study, you must prepare the InForm Portal 4.6 database schema for backup before migrating to the InForm 6.0.0.3 release.

Note: Character set differences between the InForm 4.6 release and the InForm 6.0 releases might cause issues with table column widths. Perform this step to prevent these issues.

1 Copy the InForm\InstallSupport folder from the downloaded ISO image to the InForm 4.6 application server.

2 Run **Upgrade40toMLInFormPortal.cmd** (located in the InForm\InstallSupport folder) on the InForm 4.6 application server to prepare the InForm 4.6 study schemas for backup, using the following syntax:

```
Upgrade40toMLInFormPortal.cmd <Trial_name> <TNS_Service_Name>
```

where:

- **Trial_Name**—Name of the trial
- **TNS_Service_Name**—TNS name for the database instance.

You are prompted for the following values:

- **portaluid**—Owner of the InForm Portal database schema.
- **portalpid**—Password for the owner of the InForm Portal database schema.

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

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

Back up the InForm Portal database and customized files

Back up the InForm Portal 4.6 or 5.0 database and customized files—Oracle 10g

Use this procedure if the InForm Portal software uses an Oracle 10g database.

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 the InForm Portal 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 Portal database schema.
- **trial_user_pass**—Password for the owner of the InForm Portal database schema.

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

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

Example:

```
ExportDBUpgrade.cmd D:\PortalDB.dmp TRIAL1
```

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

3 Back up any InForm Portal files that you customized.

Back up the InForm Portal 4.6, 5.5, or 6.0 database and customized files—Oracle 11g

Use this procedure if the InForm Portal software uses an Oracle 11g database.

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

2 Run **ExportDB.cmd** (located in the InForm\InstallSupport folder) on the InForm database server to back up the InForm Portal 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**.

3 Back up any InForm Portal files that you customized.

Migrate the InForm Portal software to a new database instance

1 Uninstall the previous version of the InForm Portal software.

   a Manually remove the InForm Portal DSN entries.

   b Manually remove the InForm Portal virtual directories.

2 Run **DropDB.cmd** (located in the <*InstallationDirectory*>\InForm\Bin\DBOra folder) to create a database user, using the following syntax:

```
DropDB.cmd <TNS_Service_Name>
```

   where:

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

   You are prompted for the following values:

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

   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:

```
DropDB.cmd TRIAL1
```

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

3 Import the InForm Portal 4.6 or 5.0 database schema, and then proceed to step 5.

> **Note:** To import an InForm Portal 5.5 or 6.0 database schema, proceed to step 4.

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

```
ImportDBUpgrade.cmd <DMP_file> <TNS_Service_Name> <From_Portal_UserID>
<To_Portal_UserID>
```

   where:

   - **DMP_file**—Name of the DMP file, using the full path.
   - **TNS_Service_Name**—TNS name for the database instance.
   - **From_Portal_UserID**—Owner of the portal database schema being migrated.
   - **To_Portal_UserID**—Owner of the Portal database schema created for the import.

You are prompted for the following values:

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

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

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

Example:

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

The ImportDBUpgrade command creates the log file **<***DMP_file***>.log**. For the previous example, the log file is **portal46.log.**

4 Import the InForm Portal 5.5 or 6.0 database schema.

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

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

where:

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

You are prompted for the following values:

- **orasystem_user**—Oracle database system user.
- **orasystem_user_pass**—Password for the Oracle database system user.
- **trial_user**—Owner of the new portal database schema created by the ImportPortalDB command.
- **trial_user_pass**—Password of the owner of the new portal database schema.

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

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

For example:

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

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

5 Run **Upgrade40toMLInFormPortal.cmd** (located in the InForm\InstallSupport folder), using the following syntax:

```
Upgrade40toMLInFormPortal.cmd <Trial_name> <TNS_Service_Name>
```

where:

- **Trial_Name**—Name of the trial or study.
- **TNS_Service_Name**—TNS name for the database instance.

You are prompted for the following values:

- **portaluid**—Owner of the InForm Portal database schema.
- **portalpid**—Password for the owner of the InForm Portal database schema.

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

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

Example:

```
Upgrade40toMLInFormPortal.cmd PFST55 TRIAL1
```

6 Run the Portal Configuration Tool.

Be sure to *deselect* the **Create Portal DB Schema** option, otherwise the Portal Configuration Tool drops the imported database and creates a new one. For more information, see the *Portal Administration Guide*.

7 If you are upgrading the InForm Portal from a release earlier than InForm 4.6 SP3 or InForm 5.0 SP2 and you have an existing InForm Portal Home page and images, you must copy them to a new file location after the upgrade is complete.

Move the files from:

- **Homedefault file:** <InstallationDirectory>\InForm\InFormPortal\<locale>\Users (InForm 5.0)
  or <InstallationDirectory>\InForm\InFormPortal\Users (InForm 4.6)
- **Images:** <InstallationDirectory>\InForm\InFormPortal\<locale>\Images (InForm 5.0)
  or <InstallationDirectory>\InForm\InFormPortal\Images (InForm 4.6)

To:

- **Homedefault file**:
  <InstallationDirectory>\InForm\InFormPortal_<*studyname*>\Views\Display
- **Images**: <InstallationDirectory>\InForm\InFormPortal_<*studyname*>\Images

8 Reset the InForm Portal Home page, if required.

For more information, see ***Reset the InForm Portal Home page*** (on page 65).

Migrate the InForm Portal software in the same database instance

1 Uninstall the previous version of the InForm Portal software.

   a Manually remove the InForm Portal DSN entries.

   b Manually remove the InForm Portal virtual directories.

2 If you are migrating from any InForm 4.6, InForm 4.7, or InForm 5.0 release, run **Upgrade40toMLInFormPortal.cmd** (located in the <*InstallationDirectory*>\InForm\InFormPortal\Scripts\InstallSupport folder) for each Portal schema, using the following syntax:

> **Note:** This step is not required if you are migrating from any InForm 5.5 or 6.0 release.

```
Upgrade40toMLInFormPortal.cmd <Trial_Name> <TNS_Service_Name>
```

   where:

   - **Trial_Name**—Name of the study being migrated.
   - **TNS_Service_Name**—TNS name for the database instance.

   You are prompted for the following values:

   - **portaluid**—Owner of the InForm Portal database schema.
   - **portalpid**—Password for the owner of the InForm Portal database schema.

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

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

   Example:

```
Upgrade40toMLInFormPortal.cmd PFST46 TRIAL1
```

3 Run the Portal Configuration Tool.

   Be sure to *deselect* the **Create Portal DB Schema** option, otherwise the Portal Configuration Tool drops the imported database and creates a new one. For more information, see the *Portal Administration Guide*.

4 Reset the InForm Portal Home page, if required.

   For more information, see ***Reset the InForm Portal Home page*** (on page 65).

Reset the InForm Portal Home page

If the InForm Portal Home page URL has changed as part of the upgrade, reset the home URL for each user.

1 Log in to the InForm application as an administrator who can modify user settings.

2 Update the Home page for each InForm Portal user to **./portal/default.htm**.