Migrating Data from PKS/PKSO to Integral

Contents

1   Overview

This document explains the process of migrating the Pharsight Knowledgebase System (PKS) production environment to Certara Integral.   It is intended for organizations that had PKS implemented in production and are now updating to the new Certara Integral repository. This document details how the data will appear in Integral post-migration and how best to work with the migrated data and existing analyses in Integral.

2   The Migration Process

A high level summary of the migration process include:

- A migration plan will be issued.
- The migration is a once-only event and a suitable date should be agreed with users to minimize impact on ongoing work.
- On the migration date, access to the PKS database is withdrawn and no further work can be performed using the original PKS database.
- The entire PKS database is extracted as a file (for PKSO this is done by Certara, for PKS on-premises it is extracted locally and sent to Certara)
- The PKS data is inserted into a sub schema within Integral.
- The PKS data structure is converted to Integral folders. All these imported folders are automatically set to a locked state when viewed through the Integral browser.
- The imported PKS data structure is also maintained separately within the Integral sub-schema
- Data checks are made and a migration report is issued.
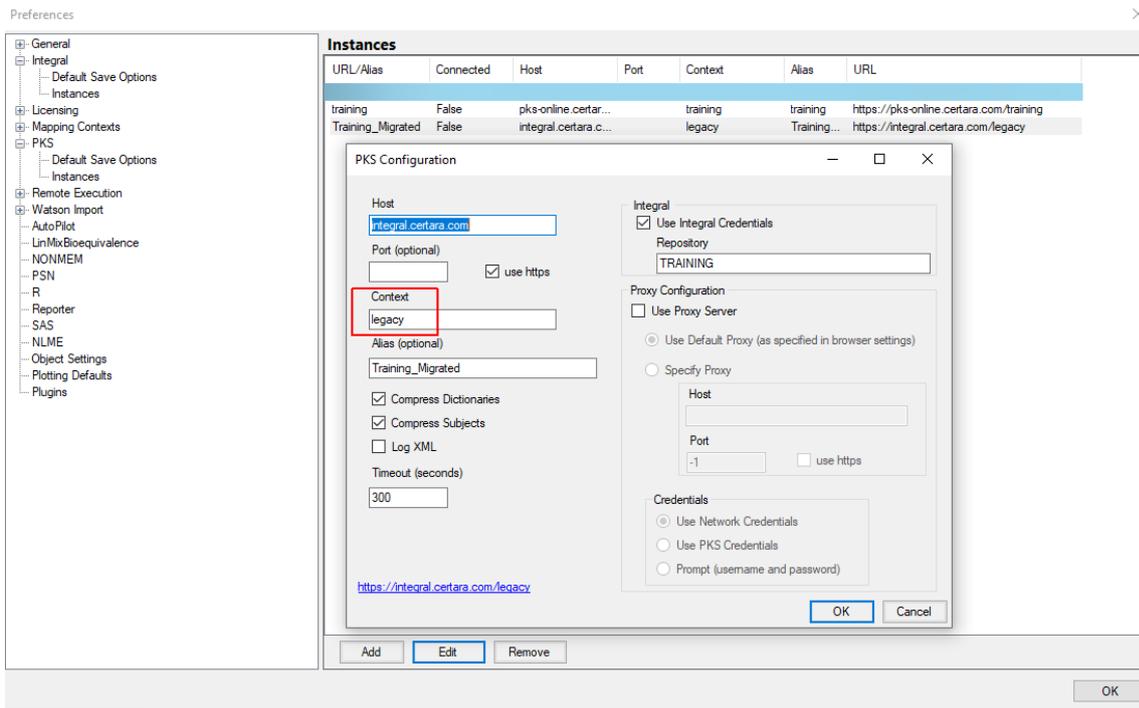
Note: Additional details on these steps can be found in the Integral Customer Migration Workflow document.

3   Working with Migrated Data

When you open Integral you will be able to see your migrated data in a series of specific Integral folder types. These attempt to mimic the folder structure which existed within the PKS database

3.1   Integral Folder types

Two root folder types are generated by the system to hold the migrated data;

Legacy Library : holds the template workflows etc. that you may have stored in PKS

Legacy Study : has 3 system generated sub-folders;

Scenarios – These contain Analyses like Integral Experiments, all versions are brought across and presented, be sure to load the most recent version. This will contain the Phoenix project as well as any extracted objects e.g. FinalParameters.csv

Study Views – these are the live queries on the PKS Study Data, by default the most recent version will be presented.

Study Objects – this corresponds to the PKS Study Library and might contain any objects like specific workflows, study protocol documents etc.

Here is an example of what you might expect to see from a migrated study in the Web Browser and the Phoenix Integral browser. The individual scenarios are listed in the scenarios folder, the study objects are listed in the study objects folder and the views all listed in sub folders within the study views folder. The properties from the original PKS study are displayed in the normal Integral layout.
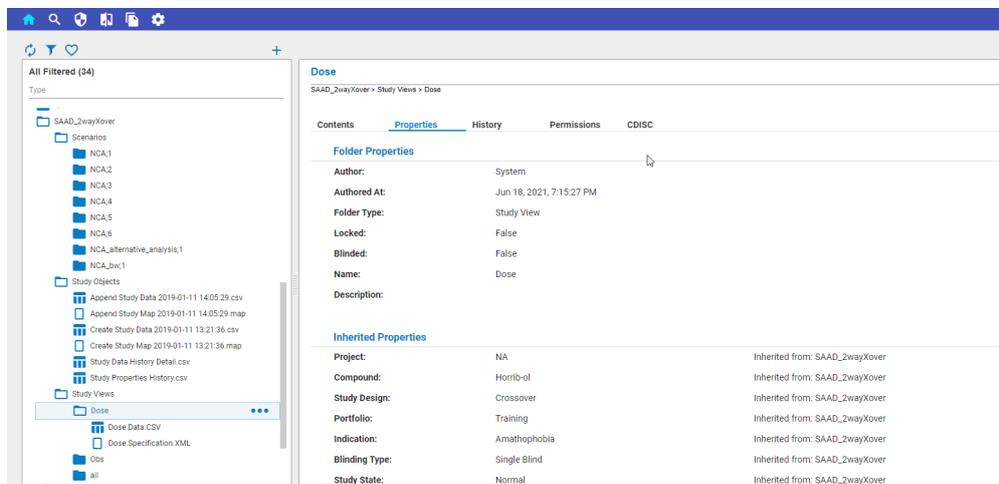
In addition to viewing your study data in the Integral layout, you can also view the data in its original PKS layout by viewing it with the PKS browser within Phoenix. Both the Integral and PKS browser plug-ins can coexist in the same Phoenix installation. Here is an example of what you would see using the PKS browser for the same study shown above. Note that you are not seeing the original PKS database but a copy of it which is held within the Integral schema.
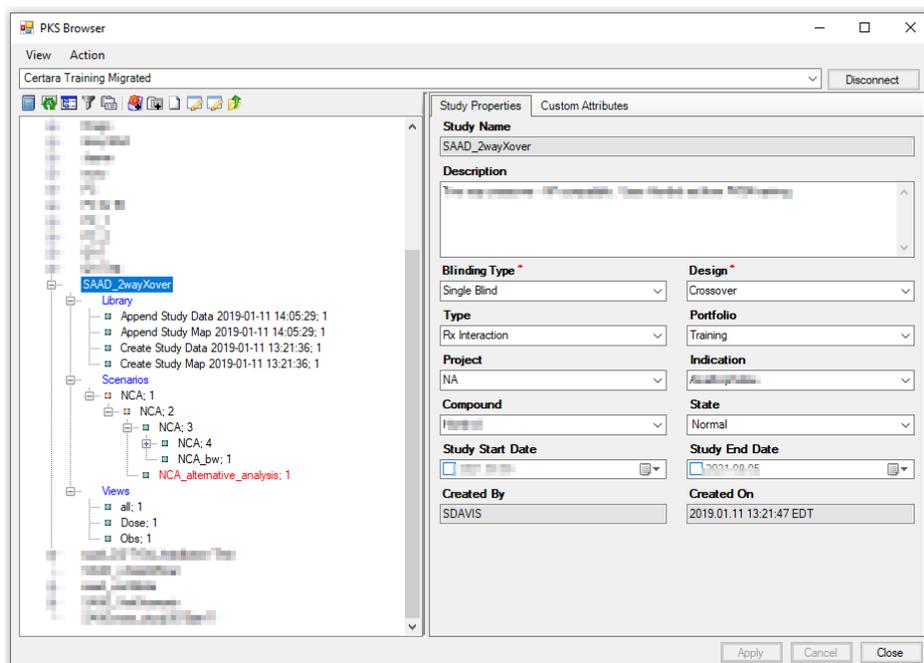
3.2 Analysing Data after Migration

3.2.1 Analysis using Integral

You can create new Experiments in the Integral database using the data migrated from PKS. This will be the majority of the work you do.

You cannot create new versions of any migrated PKS scenarios in Integral, although you could use copy/link from any extracted objects in new Integral Experiments.

3.2.2 Analysis using PKS

If necessary, you may continue to work on legacy migrated studies after the migration, by loading a scenario into Phoenix using the Phoenix PKS Browser. Note that no further work happens in the original PKS instance and all results are stored within the Integral schema.

When you save a migrated scenario to PKS in this way, the new scenario version is stored in the PKS structure, but it is also replicated in the Integral structure.

It is not possible to save an Integral Experiment back to the PKS structure.

This is not seen as a long-term process, but can be useful if analysis is ongoing in PKS at the time of migration.

3.2.3 Warnings

PKS used a middle tier to create, manage and present some additional information primarily around Security and Audit reports. This is not available within Integral so be aware that auditing of these new 'PKS' Scenarios will be limited: consider carefully if you could instead create your new analysis within Integral.

Phoenix's original PKS browser can see all the states of the PKS Scenario, including whether the Phoenix workflow is not completely executed. But this field is not available in the Phoenix Integral Browser. For this reason it is highly recommended that you get an understanding of the state your analysis, by first reviewing via the PKS Browser.

3.3 Examples and best practice

Let's consider 3 use cases for a Migrated PKS Study.

Case A – the study is finished and locked in PKS.

Case B - the study is finished and locked in PKS, but needs to be re-opened for a re-analysis or a meta-analysis.

Case C – the study is ongoing at migration.

Firstly, recall that the migrated PKS environment is essentially an archive held within the Integral schema and **working** in the original Legacy Study should be avoided if possible.

For Case A, this review assures you that all analyses are up to date, you can then use results and mine data via Integral menus.

In Cases B and C it is recommended that after checking the state of the analysis via the PKS Browser within Phoenix and, if desired, saving a copy of the Phoenix workflow template (remember to use Data Links!), to then to work exclusively via Phoenix's Integral Browser.

1) Create a new Integral root Study folder. (name must be unique)
2) (optionally Use Copy/Link to make a copy of any PKS Study Views you want to use, this is more likely for Case where there will potentially be a lot of new analyses)
3) Create an Experiment
4) Use **Load Selected Item** to bring any PKS Study Views you need from the source migrated PKS Study
5) Optionally load the Phoenix workflow template from where you saved it, either from Integral or your local machine.
6) Continue to work on the Integral experiment as usual.