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SAS[®] Clinical Data Integration 2.4

SAS[®] 9.3 Intelligence Platform
Installation and Configuration Guide
Supplement

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Installation and Configuration

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Overview

The *SAS 9.3 Intelligence Platform Installation and Configuration Guide* (located at <http://support.sas.com/documentation/cdl/en/biig/62611/HTML/default/viewer.htm#titlepage.htm>) documents all administrative tasks required for creating and managing software depots, and installing and configuring the SAS 9.3 Intelligence Platform. The SAS 9.3 Intelligence Platform is the foundation for SAS Clinical Data Integration.

Install and configure the SAS 9.3 Intelligence Platform before using this document to perform post-configuration administrative tasks that are specific to SAS Clinical Data Integration. All product documentation can be found at <http://support.sas.com/documentation/onlinedoc/clinicaldi/index.html>.

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Administration Tasks

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First-Priority Setup Tasks

The following tasks are necessary to protect the integrity of your system. Complete these steps as soon as possible after installation and before you complete any other tasks that are outlined in this section.

1 Install necessary hot fixes.

SAS Clinical Data Integration and the products it uses (such as SAS Data Integration Studio or SAS Clinical Standards Toolkit) might require hot fixes for the correct operation of some system features or to bring the server state to a supported level. Go to the SAS Clinical Data Integration Product documentation site for a complete list of required hot fixes.

2 Secure the SAS configuration on each server machine.

See the *SAS 9.3 Intelligence Platform Installation and Configuration Guide*.

3 Establish a formal, regularly scheduled backup process.

See the *SAS 9.3 Intelligence Platform Installation and Configuration Guide*.

Standard Setup Tasks

The following administration tasks are essential. They enable users to begin using SAS Clinical Data Integration to access, standardize, and analyze data.

1 Add Clinical Administrators and manage access.

Users who manage data standards, controlled terminology, studies, and submissions require access to the Clinical Administrators group. The SAS Clinical Data Integration configuration process adds the Clinical Administrators Group to the metadata server. For more information, see the *SAS Clinical Data Integration: User's Guide*.

2 Add users and manage access.

See the *SAS 9.3 Intelligence Platform Installation and Configuration Guide*.

3 Establish connectivity to your data sources.

See the *SAS 9.3 Intelligence Platform Installation and Configuration Guide*.

4 Set up your metadata folder structure.

See the *SAS 9.3 Intelligence Platform Installation and Configuration Guide*.

5 Import a data standard.

At least one active data standard is required to use the features of SAS Clinical Data Integration. For more information about importing data standards, see to the *SAS Clinical Data Integration: User's Guide*.

6 Import and manage controlled terminology.

For more information about importing and managing controlled terminology, see the *SAS Clinical Data Integration: User's Guide*.

Optional Setup Tasks

You might need to modify your initial configuration to meet specific requirements in your environment.

- 1 Review the optional tasks addressed in the *SAS 9.3 Intelligence Platform Installation and Configuration Guide*.
- 2 Set up your default study and submission folders and libraries.

A default metadata folder tree and libraries can be defined for studies and submissions. These folders and libraries are created when a new study or submission is added. For more information about defining default content, see the *SAS Clinical Data Integration: User's Guide*.

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Best Practices for Ensuring the Integrity of Your System

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Introduction to Best Practices

In addition to the best practices defined in the *SAS 9.3 Intelligence Platform Installation and Configuration Guide*, you should consider the following information related to the clinical metadata managed by SAS Clinical Data Integration.

Re-Import a Data Standard Rather Than Use Copy or Import Operations

In cases where a data standards administrator wants to create a custom version of an existing data standard, it is much easier to import it again as a new data standard. This ensures that associated libraries and metadata properties are adjusted accordingly.

If you copy or import a data standard, be sure to run a repair operation on the new copy before using the data standard. For more information about repairing domains, see the *SAS Clinical Data Integration: User's Guide*.

Copy a Domain By Using the Wizard Rather Than Use Copy and Paste

To properly copy a domain that has already been defined elsewhere in metadata, use the provided wizard. The wizard enforces data standard version rules and adjusts metadata links for the new copy.

If you copy and paste a domain instead of using the wizard, be sure to run a repair operation on the new copy before using it. For more information about repairing domains, see the *SAS Clinical Data Integration: User's Guide*.