THE POWER TO KNOW.

SAS® Clinical Data Integration 2.6

SAS® 9.4 Intelligence Platform Installation and Configuration Guide Supplement

SAS® Documentation

The correct bibliographic citation for this manual is as follows: SAS Institute Inc. 2015. *SAS® Clinical Data Integration 2.6: SAS® 9.4 Intelligence Platform Installation and Configuration Guide Supplement*. Cary, NC: SAS Institute Inc.

SAS® Clinical Data Integration 2.6: SAS® 9.4 Intelligence Platform Installation and Configuration Guide Supplement

Copyright © 2015, SAS Institute Inc., Cary, NC, USA

All rights reserved. Produced in the United States of America.

For a hard-copy book: No part of this publication may be reproduced, stored in a retrieval system, or transmitted, in any form or by any means, electronic, mechanical, photocopying, or otherwise, without the prior written permission of the publisher, SAS Institute Inc.

For a web download or e-book: Your use of this publication shall be governed by the terms established by the vendor at the time you acquire this publication.

The scanning, uploading, and distribution of this book via the Internet or any other means without the permission of the publisher is illegal and punishable by law. Please purchase only authorized electronic editions and do not participate in or encourage electronic piracy of copyrighted materials. Your support of others' rights is appreciated.

U.S. Government License Rights; Restricted Rights: The Software and its documentation is commercial computer software developed at private expense and is provided with RESTRICTED RIGHTS to the United States Government. Use, duplication or disclosure of the Software by the United States Government is subject to the license terms of this Agreement pursuant to, as applicable, FAR 12.212, DFAR 227.7202-1(a), DFAR 227.7202-3(a) and DFAR 227.7202-4 and, to the extent required under U.S. federal law, the minimum restricted rights as set out in FAR 52.227-19 (DEC 2007). If FAR 52.227-19 is applicable, this provision serves as notice under clause (c) thereof and no other notice is required to be affixed to the Software or documentation. The Government's rights in Software and documentation shall be only those set forth in this Agreement.

SAS Institute Inc., SAS Campus Drive, Cary, North Carolina 27513-2414.

February 2015

SAS provides a complete selection of books and electronic products to help customers use SAS® software to its fullest potential. For more information about our offerings, visit **support.sas.com/bookstore** or call 1-800-727-3228.

SAS® and all other SAS Institute Inc. product or service names are registered trademarks or trademarks of SAS Institute Inc. in the USA and other countries. ® indicates USA registration.

Other brand and product names are trademarks of their respective companies.

Contents

Chapter 1 • Installation and Configuration **1**
Overview 1

Chapter 2 • Administration Tasks **3**
First-Priority Setup Tasks 3
Standard Setup Tasks 4
Optional Setup Tasks 5

Chapter 3 • Best Practices for Ensuring the Integrity of Your System **7**
Introduction to Best Practices 7
Re-Import a Data Standard Rather Than Use Copy or Import Operations 7
Copy a Domain By Using the Wizard Rather Than Use Copy and Paste 8

1

Installation and Configuration

Overview 1

Overview

The *SAS 9.4 Intelligence Platform Installation and Configuration Guide* (located at http://support.sas.com/documentation/cdl/en/biig/63852/HTML/default/viewer.htm#titlepage.htm) documents all administrative tasks required for creating and managing software depots, and installing and configuring the SAS 9.4 Intelligence Platform. The SAS 9.4 Intelligence Platform is the foundation for SAS Clinical Data Integration.

Install and configure the SAS 9.4 Intelligence Platform before using this document to perform post-configuration administrative tasks that are specific to SAS Clinical Data Integration. All SAS Clinical Data Integration documentation can be found at http://support.sas.com/documentation/onlinedoc/clinicaldi/index.html.

2

Administration Tasks

First-Priority Setup Tasks 3
Standard Setup Tasks 4
Optional Setup Tasks 5

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 that 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 9.4 Intelligence Platform Installation and Configuration Guide*.

3 Establish a formal, regularly scheduled backup process.

See the *SAS 9.4 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 9.4 Intelligence Platform Installation and Configuration Guide*.

3 Establish connectivity to your data sources.

   See the *SAS 9.4 Intelligence Platform Installation and Configuration Guide*.

4 Set up your metadata folder structure.

   See the *SAS 9.4 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 9.4 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*.

3

Best Practices for Ensuring the Integrity of Your System

Introduction to Best Practices 7

Re-Import a Data Standard Rather Than Use Copy or Import Operations 7

Copy a Domain By Using the Wizard Rather Than Use Copy and Paste 8

Introduction to Best Practices

In addition to the best practices defined in the *SAS 9.4 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

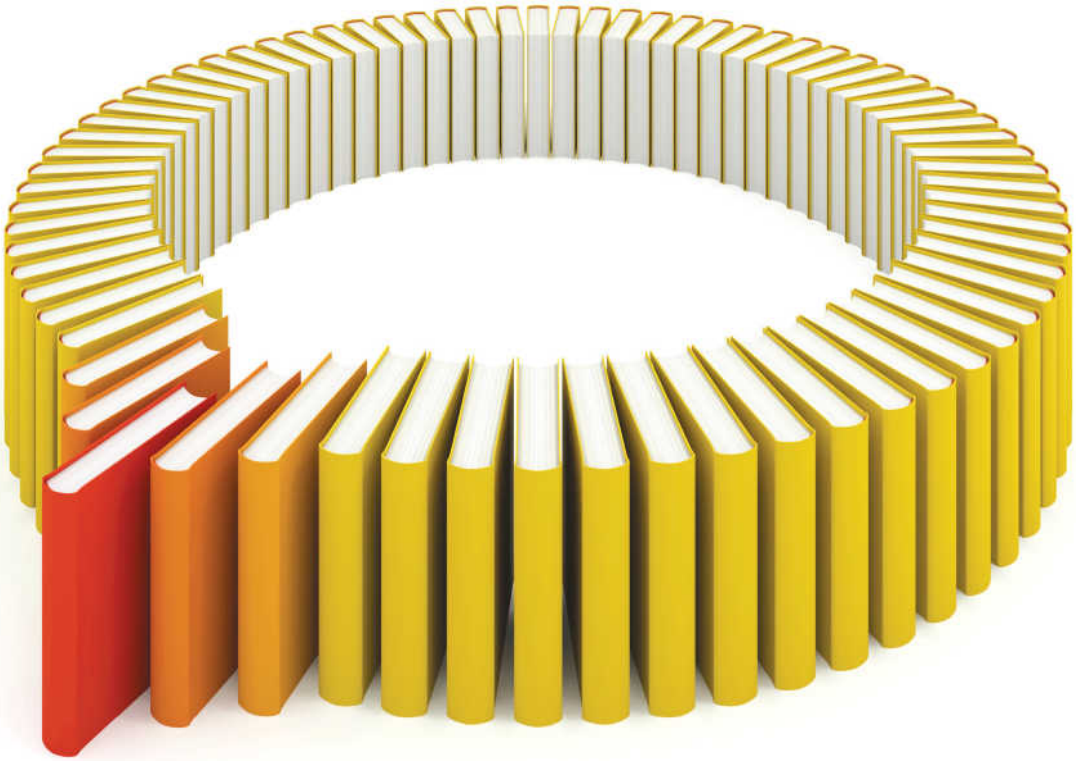
In cases where a data standards administrator wants to create a custom version of an existing data standard, it is much easier to import it again as a new data standard. This ensures that associated libraries and metadata properties are adjusted accordingly.

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*.



Gain Greater Insight into Your SAS® Software with SAS Books.

Discover all that you need on your journey to knowledge and empowerment.

support.sas.com/bookstore
for additional books and resources.

sas
THE POWER TO KNOW.