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SAS[®] Clinical Data Integration 2.2: SAS[®] 9.2 Intelligence Platform Installation and Configuration Guide

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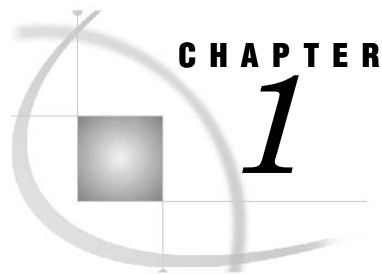
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Overview

The *SAS 9.2 Intelligence Platform Installation and Configuration Guide* (<http://support.sas.com/documentation/cdl/en/biig/60946/HTML/default/titlepage.htm>) documents the administrative tasks that are required for creating and managing software depots and installing and configuring the SAS 9.2 Intelligence Platform, which serves as the foundation for SAS Clinical Data Integration. This document contains additional information about 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>.

Administrative Tasks

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.

Table 1.1 Tasks

Task	Description
Install necessary hot fixes.	SAS Clinical Data Integration, the products that it uses (such as SAS Data Integration Studio or SAS Clinical Standards Toolkit), or both might require hot fixes for the correct operation of some system features or to bring the server state to a supported level. For a complete list of required hot fixes, go to the SAS Clinical Data Integration product documentation Web site (http://support.sas.com/documentation/onlinedoc/clinicaldi/index.html).

Task	Description
Run SAS Clinical Standards Toolkit post-installation code to update CDSIC-SDTM 3.1.2 metadata	Follow the instructions as provided in the <i>Installation Instructions for SAS Clinical Standards Toolkit in SAS 9.1.3</i> . This document can be found on the SAS Clinical Standards Toolkit product documentation Web site (http://support.sas.com/documentation/onlinedoc/clinical/index.html).
Secure the SAS configuration on each server machine.	See <i>SAS 9.2 Intelligence Platform Installation and Configuration Guide</i> .
Establish a formal, regularly scheduled backup process.	See <i>SAS 9.2 Intelligence Platform Installation and Configuration Guide</i> .

Standard Setup Tasks

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

Table 1.2 Tasks

Task	Description
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 <i>SAS Clinical Data Integration: Users Guide</i> .
Add users and manage access.	See <i>SAS 9.2 Intelligence Platform Installation and Configuration Guide</i> .
Establish connectivity to your data sources.	See <i>SAS 9.2 Intelligence Platform Installation and Configuration Guide</i> .
Set up your metadata folder structure.	See <i>SAS 9.2 Intelligence Platform Installation and Configuration Guide</i> .
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 the <i>SAS Clinical Data Integration: Users Guide</i> .
Import and manage controlled terminology.	For more information about importing and managing controlled terminology, see the <i>SAS Clinical Data Integration: Users Guide</i> .

Optional Setup Tasks

It might be necessary for you to modify your initial configuration to meet specific requirements in your environment. The following is an optional administration and configuration task, in addition to optional tasks defined in the *SAS 9.2 Intelligence Platform Installation and Configuration Guide*.

Table 1.3 Task

Task	Description
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 <i>SAS Clinical Data Integration: Users Guide</i> .

Best Practices for Ensuring the Integrity of Your System

In addition to the best practices defined in the *SAS 9.2 Intelligence Platform Installation and Configuration Guide*, the following information related to the clinical metadata managed by the system should be considered.

Reimport a Data Standard Rather than Use Copy or Import Operations

In cases where a data standard 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 choose to copy or import a data standard, then you must be sure to run a repair operation on the new copy before using it. For more information about repairing data standards, see the *SAS Clinical Data Integration: Users Guide*.

Use New Domain Wizards Instead of Copying and Pasting a Domain

The new item menu in SAS Clinical Data Integration contains a **Custom Domain from Existing** wizard. This enables you to effectively copy a domain that has already been defined somewhere else in metadata. The wizard enforces data standard version rules and adjusts metadata links for the new copy. If you choose to copy and paste a domain, then you must 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 Users Guide*.

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