

SAS 9.2 Intelligence Platform Installation and Configuration Guide Supplement

SAS[®] Clinical Data Integration 2.1

The *SAS 9.2 Intelligence Platform Installation and Configuration Guide* (<http://support.sas.com/documentation/cdl/en/biig/60946/HTML/default/titlepage.htm>) documents all of the administrative tasks 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 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.

Task	Description
Install necessary hot fixes.	SAS Clinical Data Integration and/or the products it uses (such as SAS Data Integration Studio or SAS Clinical Standards Toolkit) may 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 (http://support.sas.com/documentation/onlinedoc/clinicaldi/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.

Task	Description
Add Clinical Administrators and manage access.	Users who will 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. Refer to the SAS Clinical Data Integration Users Guide for more information.
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> .
Setup 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. Refer to the SAS Clinical Data Integration Users Guide for more information about importing data standards.
Import and manage controlled terminology.	Refer to the SAS Clinical Data Integration Users Guide for more information about importing and managing controlled terminology.

Optional Setup Tasks

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

Task	Description
Setup 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. Refer to the SAS Clinical Data Integration Users Guide for more information about defining default content.

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.

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 will ensure that associated libraries and metadata properties are adjusted accordingly. If you choose to copy or import a data standard, you must be sure to run a repair operation on the new copy before using it. Refer to the *SAS Clinical Data Integration Users Guide* for more information about repairing data standards.

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 will allow you to effectively copy a domain that has already been defined somewhere else in metadata. The wizard will enforce data standard version rules and adjust metadata links for the new copy. If you choose to copy and paste a domain, you must be sure to run a repair operation on the new copy before using it. Refer to the *SAS Clinical Data Integration Users Guide* for more information about repairing domains.

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