

Instructions for Alternate JMP Clinical Configurations

JMP Clinical supports multiple configurations that can define a distinct set of folders where study metadata and report output will be stored. One of the main purposes of this feature is to enable sharing of studies and reviews (at varying levels) using shared/mapped network drives across a set of users.

Three main files ship with JMP Clinical and exist in the product install directory (<C:\Program Files\SASHome\JMPClinical\12\LifeSciences>) to control configurations, path preferences, and system preferences.

- The *installation.configuration.preferences* file contains named configuration variations and the root location(s) to look for installation configurations (as defined by the *installation.path.preferences* file described below). This file should always remain in the installation directory and will be used to surface options in the JMP Clinical User Interface Settings tab to change user configurations.
- The *installation.path.preferences* file contains all the path locations that can be configured to change where JMP Clinical reads/writes for system operations. The Default “Local” configuration that ships with the product looks for this file in the install directory. All default paths use a local configuration and store metadata under the JMP Clinical application data USER/ROAMING profile (<C:\Users\^USER\AppData\Roaming\SAS\JMPClinical\12>).
 - To set up a new configuration, this file must be copied and placed into the target root directory location as specified in *installation.configuration.preferences*.
 - To successfully set up a new configuration **at a minimum** we recommend changing the path specifications in the following lines of the file placed in the share root directory.
 - { "<userRoot>", "\$HOME" } where \$HOME should be changed to reference the root path of the configuration
 - { "/system/clinical/preferences", "\$LS_HOME" } where \$LS_HOME should be changed to reference the root path of the configuration (or another location of your choice)
 - { "<userLocal>", "\$DOCUMENTS\JMPClinical\Local" } where “Local” should be changed to reference the name of the share
- The *system.clinical.preferences* file contains various system-level options for a given configuration. This file should also be copied and placed in the target location specified for the "/system/clinical/preferences" key in *installation.path.preferences*.

One of the key components of the *system.clinical.preferences* file is the specification of user role assignments. A user role defines the level of functional interactivity that a user has in JMP Clinical. The following user roles can be set for individual users.

- Study Manager – A user with this role can do all of the operations involved in managing studies within JMP Clinical: add, combine, and refresh metadata, rename or move folders, update a review with a new snapshot, update the study risk data set, and delete studies. The code specification for this role is “StudyManager”.
- Review Author – A user with this role can create/edit/save Review Templates, do ad-hoc analyses, and create and save Reviews. They also can manage the Holiday and

Event data set and Risk Threshold data sets used by the configuration. A Review Author implicitly has the Reviewer role as well. The code specification for this role is “ReviewerAuthor”.

- Reviewer – a user with this role can open Reviews. The code specification for this role is “Reviewer”.
- Settings Editor – a user with this role has access to the Settings tab on the Main Clinical window. This enables them to select different configurations (if defined), change how they view Documentation and Help. The code specification for this role is “SettingsEditor”.
 - Important Note: We generally do not recommend restricting the “SettingsEditor” rights from users. This should be done only if you wish to severely restrict the use of the system for that user and they will not even be able to change/select configurations.

By default, all users are assigned all roles. System administrators, however, can restrict individual users to specific user roles using the following procedures.

Instructions for Setting Up a New JMP Clinical Configuration

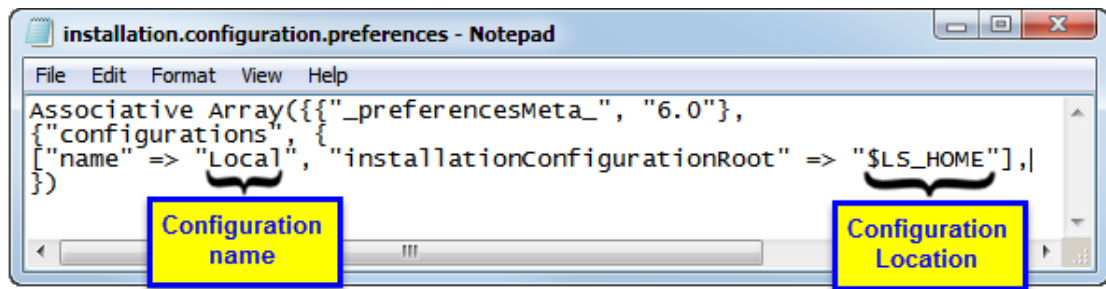
This example adds a configuration that enables sharing of studies and reviews across multiple users

Map the Shared/network drive and set up the shared folder.

1. Map the Shared/network drive and copy necessary preference files.
 - a. Use Window OS commands to map the drive where the new share is to reside. In this example, the shared drive is defined as drive U:. **Note:** Your file path will be different.
 - b. Create a new folder in the mapped location. In this case, we will name the folder *ClinicalShare*. This folder will serve as the root directory for the new shared configuration.
 - c. Copy the *installation.path.preferences* and the *system.clinical.preferences* files from the product install directory (<C:\Program Files\SASHome\JMPClinical\12\LifeSciences>) into the *ClinicalShare* folder.
 - i. NOTE: For simplicity, these instruction will use the same *ClinicalShare* location for placing the *system.clinical.preferences* file. Optionally this file could be placed in a separate location for a system administrator to manage.

Modify the *installation.configuration.preferences* file.

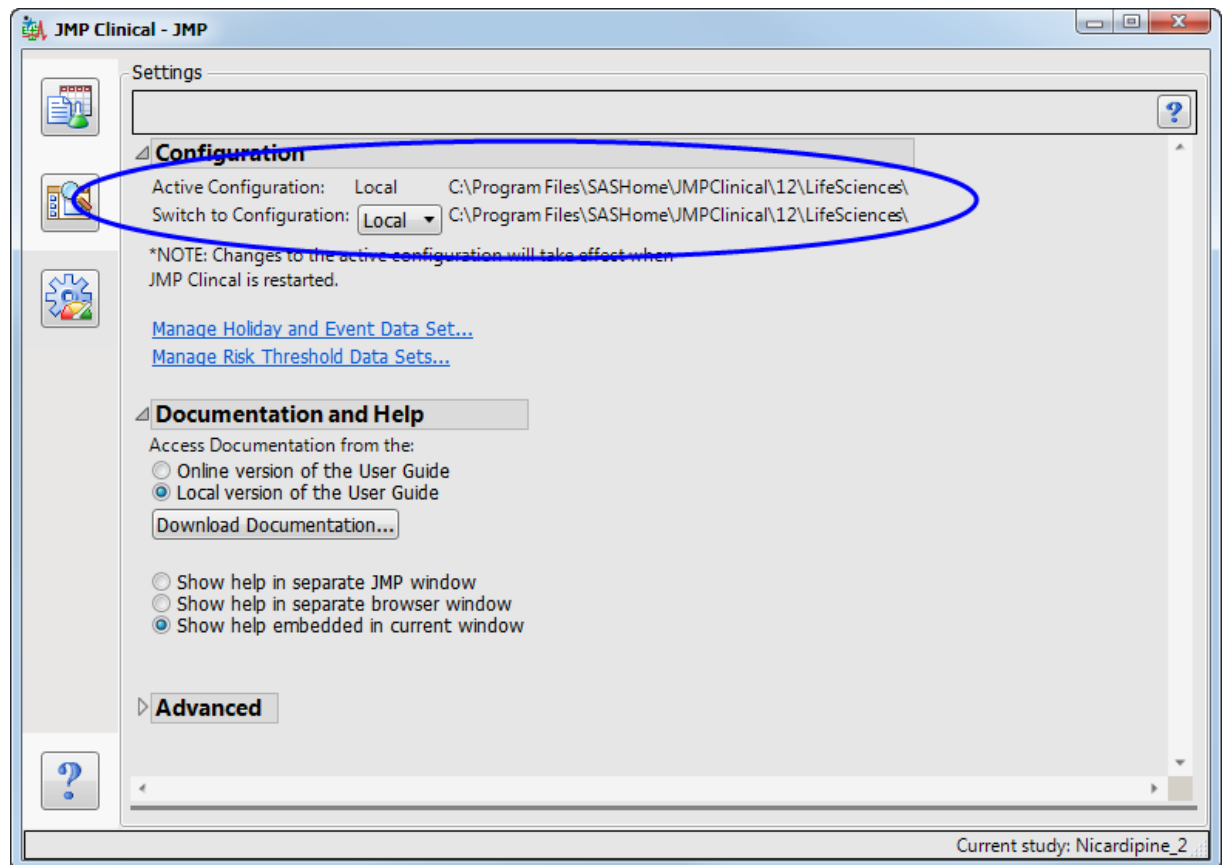
2. Examine the *installation.configuration.preferences* file shown below:



The key statement in this file is:

`[“name” => “Local”, “installationConfigurationRoot” => “$LS_HOME”]`

This line defines both the name and location of the default configuration. In this case, the name of the configuration is Local and it is located in the \$LS_HOME, which in the default installation is set to C:\Program Files\SASHome\JMPClinical\12\LifeSciences\. This is the location shown on the JMP Clinical **Settings** tab, as shown below:



To add a new configuration, you must copy and modify this key statement so that it defines both the name and the location of where to find the new preference files detailing the configuration.

3. Navigate to the JMP Clinical installation folder (normally C:\Program Files\SASHome\JMPClinical\12\LifeSciences) on your local machine and open the *installation.configuration.preferences* file with a text editor.

4. Copy the key statement, including the square brackets. Enter a comma (“,”) directly after the key statement and then paste the copy directly after the comma. Change the name and location in the pasted copy to the name and location of the configuration. In this case the name is Share and the location is U:\ClinicalShare. Your name and location must be enclosed by the quotation marks. The modified statement should appear as shown below:

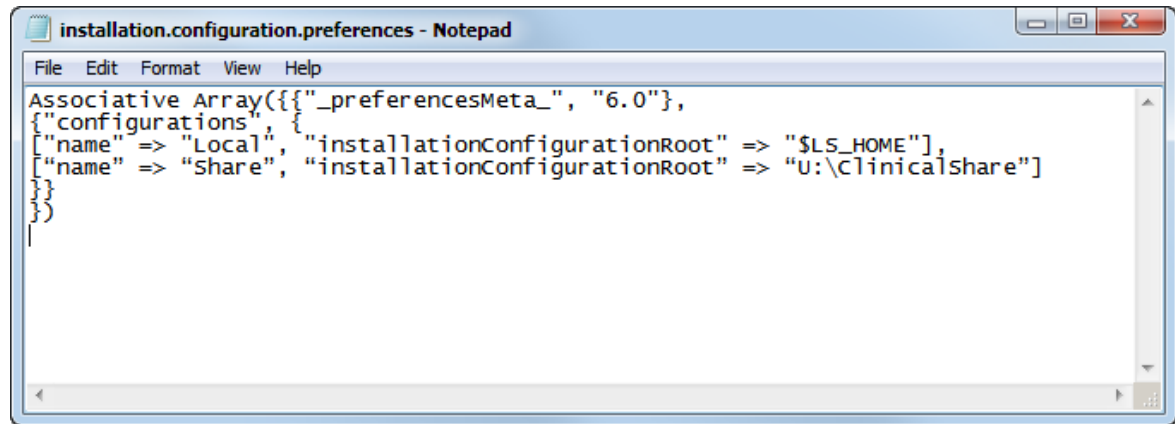
```
[“name” => “Local”, “installationConfigurationRoot” => “$LS_HOME”],
```

```
[“name” => “Share”, “installationConfigurationRoot” => “U:\ClinicalShare”]
```

Note: Entries are case-sensitive.

Caution: In the example shown here, the location is specified using a mapped drive path. Locations should contain mapped drive paths only if your organization's setup guarantees that all users have the same mapped drives. If you are unsure, you should use the UNC path instead. If the specified path is just a mapped drive letter (U:, for example), you must include a trailing backslash after the colon (“U:\”).

The modified file is shown below:

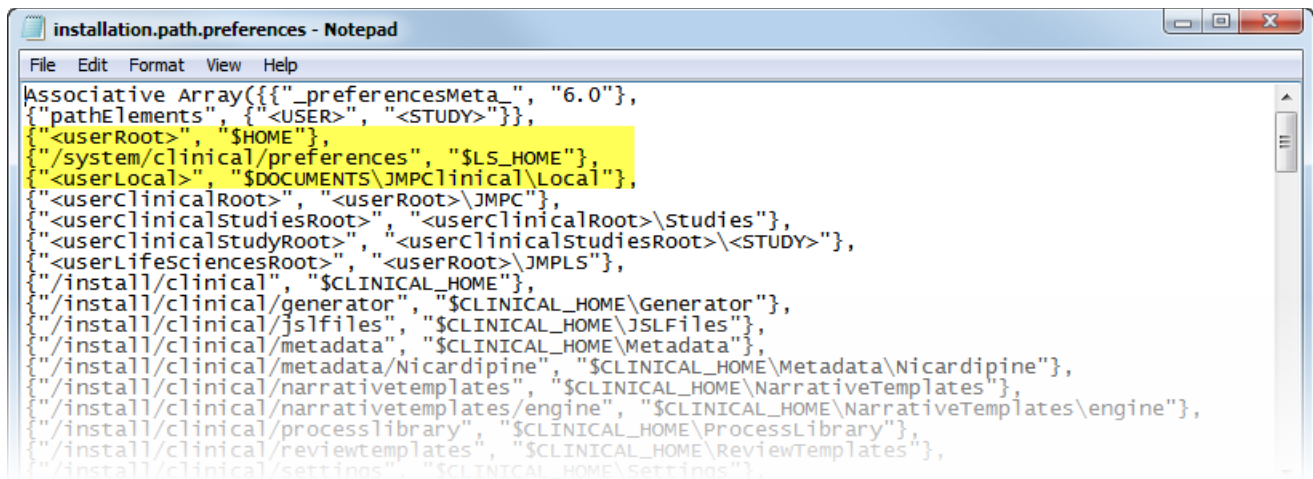


5. Save and close the file.

Modify the *installation.path.preferences* file.

6. Open and examine the *installation.configuration.preferences* file that you placed in the specified configuration folder (U:\ClinicalShare). All path specifications within this file can be changed to direct metadata and system output to the customized locations of choice.

The key statements we recommend (at a minimum) changing are highlighted in the image below:



```
File Edit Format View Help
Associative Array({{"_preferencesMeta_", "6.0"},
"pathElements", {"<USER>", "<STUDY>"}},
{"<userRoot>", "$HOME"},
"/system/clinical/preferences", "$LS_HOME"},
{"userLocal", "$DOCUMENTS\JMPClinical\Local"},
{"userClinicalRoot", "<userRoot>\JMPC"},
{"userClinicalStudiesRoot", "<userClinicalRoot>\Studies"},
{"userClinicalStudyRoot", "<userClinicalStudiesRoot>\<STUDY>"},
{"userLifeSciencesRoot", "<userRoot>\JMPLS"},
"/install/clinical", "$CLINICAL_HOME"},
"/install/clinical/generator", "$CLINICAL_HOME\Generator"},
"/install/clinical/jslfiles", "$CLINICAL_HOME\JSLFiles"},
"/install/clinical/metadata", "$CLINICAL_HOME\Metadata"},
"/install/clinical/metadata/Nicardipine", "$CLINICAL_HOME\Metadata\Nicardipine"},
"/install/clinical/narrativetemplates", "$CLINICAL_HOME\NarrativeTemplates"},
"/install/clinical/narrativetemplates/engine", "$CLINICAL_HOME\NarrativeTemplates\engine"},
"/install/clinical/processlibrary", "$CLINICAL_HOME\ProcessLibrary"},
"/install/clinical/reviewtemplates", "$CLINICAL_HOME\ReviewTemplates"},
"/install/clinical/settings", "$CLINICAL_HOME\Settings"}).
```

7. The first key statement is:

```
{\"<userRoot>\", \"$HOME\"}.
```

This line defines the location of the userRoot directory. This defines the top level folder where all JMP Clinical metadata will be saved. In this case, the file is located in the \$HOME, which in the default installation is set to C:\Program Files\SASHome\JMPClinical\12\LifeSciences\.

- For simplicity, these instructions will use the same directory where you have placed the *installation.path.preferences* for where the new configuration will write metadata.
- Note the use of **<userRoot>** throughout other keys in the *installation.path.preferences* file. By default this location will also be where Templates, Reviews, Notes, and Static Reports along with other related JMP Clinical processing. This behavior can be changed and managed if desired.

8. Change the statement so that the location of the shared userRoot directory is the configuration folder:

```
{\"<userRoot>\", \"U:\ClinicalShare\"}.
```

9. The second key statement is:

```
{\"/system/clinical/preferences\", \"$LS_HOME\"}.
```

This line defines the location of the *system.clinical.preferences* file. In this case, the file is located in the \$LS_HOME, which in the default installation is set to C:\Program Files\SASHome\JMPClinical\12\LifeSciences\.

10. Change the location in statement to the location of the new configuration at U:\ClinicalShare (or to another location of your choice). Your name and location must be enclosed by the quotation marks. The modified statement should appear as shown below:

```
{\"/system/clinical/preferences\", \"U:\ClinicalShare\"}.
```

11. The third key statement is:

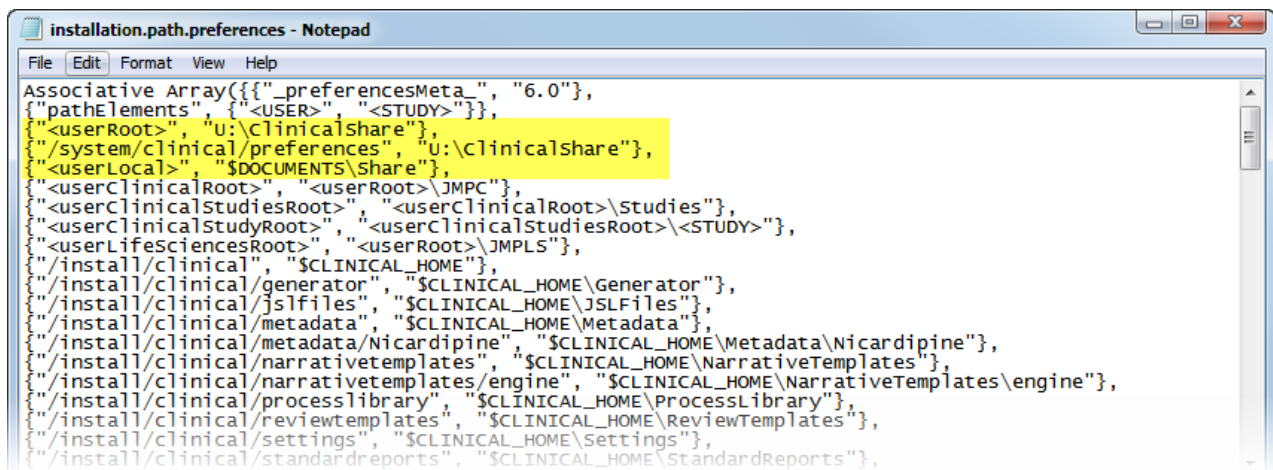
```
{"<userLocal>", "$DOCUMENTS\JMPClinical\Local"}.
```

This line defines location where temporary report output while building reviews with JMP Clinical will be. We recommend keeping this location somewhere on the users' local desktops (e.g. \$DOCUMENTS).

12. Change the location in statement so that local output does not conflict across different configurations (here we use the named configuration "Share"). The modified statement should appear as shown below:

```
{"<userLocal>", "$DOCUMENTS\Share"}.
```

13. Save the modified *installation.path.preferences* file in the configuration location. It should appear as shown below:



14. Close the file.

Modification of the *system.clinical.preferences* file (OPTIONAL).

15. Open the *system.clinical.preferences* file using a text editor.

16. Scroll down to the following code:

```
/** Role Assignments */  
{"DefaultRoleAssignment", {"StudyManager", "ReviewAuthor", "Reviewer",  
"SettingsEditor"}},  
{"RoleAssignments", Associative Array({  
})}
```

Note that there are two assignment sections: *DefaultRoleAssignment* and *RoleAssignments*. *DefaultRoleAssignment* lists the roles that all users will have by default if no further specifications of user names in the *RoleAssignments* array are made. *RoleAssignments* lists each user (using their Windows User Name) and the roles assigned specifically to that user with regard to the default assignment. Initially, this section is empty by default.

17. Determine the roles each of your users are to be assigned. In the example, shown here, there are three users: userA¹, userB, and userC. UserA is a Study Manager who can also make and view JMP Clinical reviews; user B is Review Author and Reviewer but does not have Study Management rights; userC is restricted to only look at finished Reviews.

In this scenario the updated *DefaultRoleAssignment* section could appear as follows:

```
{"DefaultRoleAssignment", {"ReviewAuthor", "Reviewer", "SettingsEditor"}},
```

Note that roles are enclosed in quotation marks.

18. Modify the *RoleAssignments* section to include each user and his/her specific roles. In this example, in addition to the default roles, userA is a study manager and userB is a review author and reviewer; userC lacks study manager or review creation capabilities and is a reviewer only.

The updated RoleAssignments section appears as follows:

```
{"RoleAssignments", Associative Array({  
    {"userA", {"StudyManager"}},  
    {"userC", {"-ReviewAuthor"}}  
})}
```

Note that user identifiers and roles are enclosed in quotation marks.

This example used an **additive** approach to define additional role(s) for userA in reference to the default role assignment. For userC a **subtractive** approach was used to remove the default "ReviewAuthor" role using "-" in front of the role name; indication the removal of that role from userC. No specification is needed for userB because they match the default role assignments.

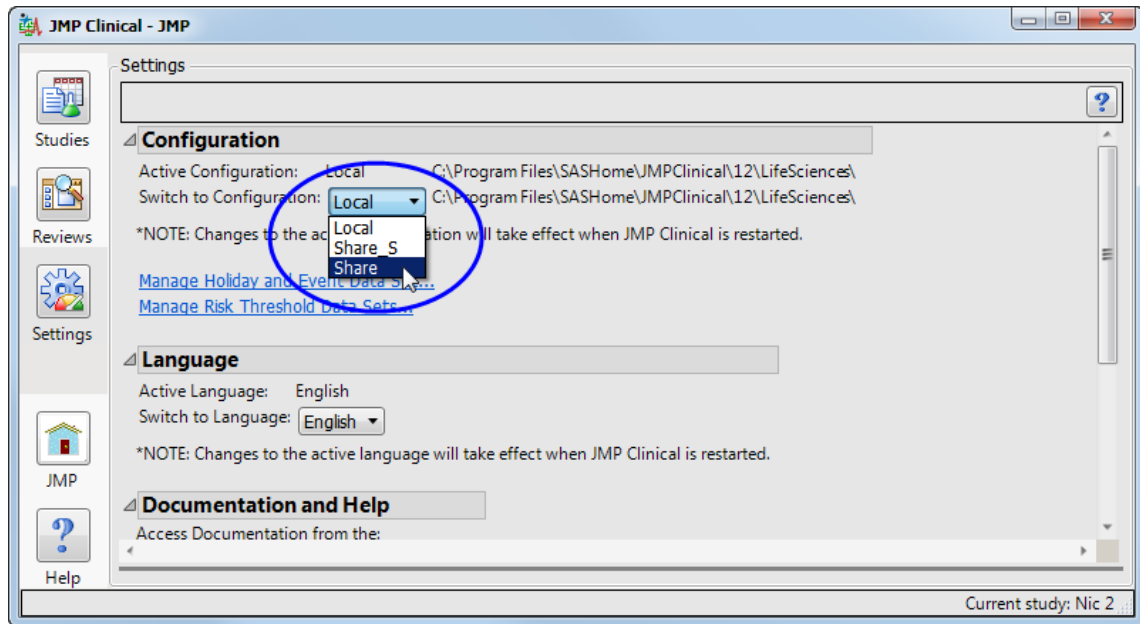
19. Save and exit the file.

Changing JMP Clinical Configurations

20. Close and then reopen JMP Clinical.

¹ Users are identified by the Windows user name used to log into the machine and local network.

21. Click the **Settings** tab and then on the **Configuration** drop-down menu. The new “Share” configuration is now shown as an option.



22. Select **Share**. You must close and reopen JMP Clinical before the new selection takes effect. If the new **Share** folder is an existing shared folder, studies contained within the folder are displayed on the **Studies** tab. If this is a new shared folder, JMP Clinical will add the necessary components for the folder to function as a shared studies folder.

Note: Anyone with Read/Write privileges on the shared drive will have access to a new shared folder. As the creator of this folder you can control level of access by changing the permissions using WinO/S commands.