Learn how to plan for and execute the migration from Windows 7 to an upgraded software.

In the second part of this three-part series, *LCGC* continues its conversation with Ryan O’Boyle, advanced informatics support engineer, and Greg Cook, regional manager, Americas informatics support, of Agilent Technologies to discuss upgrading from Windows 7, various upgrade options, and the capabilities of OpenLab CDS.

**LCGC: When it comes to upgrading, what things should a lab consider?**

**O’Boyle:** Beyond operating system (OS) and software compatibility, PC hardware compatibility, and instrument compatibility, allow time for instrument or lab downtime during the upgrade process. Workstation configurations of the software will usually only require one day of downtime, but if you have a client-server implementation of the software, then the planning and implementation of an upgrade can be much more involved. It’s very important to coordinate with the services organization and plan beforehand to minimize downtime.

Cost is another thing to consider—beyond software upgrades, you may need to upgrade your PC hardware, instruments, and/or network infrastructure, so planning for these costs is important. Additionally, your technicians will need to be fully trained on the software. Whether you’re upgrading to a newer version of the same software or upgrading to the newest platform, OpenLab CDS, your technicians will need to be trained.

**Cook:** This is a really good opportunity for customers to look at the topology they’re operating in. We have seen a significant increase in the number of customers moving off workstation-based environments to client-server environments—this is when a backend server stores data, and computers inside the lab connect and control the instruments. The benefit of client-server environments is data integrity and data security. The backend server, the ECM server, is a secure server with FDA-compliant capabilities.

**LCGC: What kind of upgrade options are there?**

**O’Boyle:** The two main upgrade options are upgrading to a newer release of your current CDS application or upgrading to the latest CDS platform, OpenLab CDS. When designing the OpenLab CDS application, we simplified the migration process so that methods and other files in the software are easily migratable and compatible with the new platform. [See Laboratory Software Migrations and Software Upgrades Simplified]

**Cook:** If you’re on a software maintenance agreement (SMA), then you are entitled to software updates and technical support through the informatics support team.
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If you’re not on an SMA, there is a purchase option: a discounted version of the software with an option to purchase up to the latest version. A lot of customers stay on older versions of software, but it's much easier to upgrade if you stay current and update as newer versions become available.

**LCGC: What does OpenLab CDS have to offer customers?**

**O’Boyle:** One of the biggest new features is the custom calculator. It allows users to program calculations into OpenLab CDS that, in older applications, were done in Excel. So, there is no longer a need to export results into Excel—it’s all inclusive. It also has an adaptable and customizable reporting editor that allows you to report custom-calculated results by setting up your own custom expressions.

There are also new data integrity and security features, including detailed audit trails throughout your data methods, report templates, etc., so you can track what changes are made and who is making those changes. E-signatures allow users to sign off on results to ensure that they are reviewed by someone with the appropriate user-access level. The software also enables customizable user roles and privileges. Ultimately, you can control which users have access to certain functions.

**Cook:** OpenLab CDS with ECM backend was built from the ground up to provide a significant level of compliance for FDA-regulated and other regulated environments. We built in compatibility for previous versions of our software applications, so data, methods, and reports as well as user configurations and settings can be migrated and imported into OpenLab CDS, which simplifies the transition from a ChemStation Edition workstation. This really helps customers transition because they don’t have to rebuild everything from scratch.

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