Agilent CrossLab
From Insight to Outcome

Agilent CrossLab Start Up Services

Agilent InfinityLab LC Series Method Development Solution Introduction Checklist

Thank you for purchasing a software from **Agilent Technologies** and software distributed by Agilent Technologies. CrossLab Start Up is focused on helping customers shorten the time it takes to start realizing the full value of their instrument system investment. Installation, Introduction and First Run Assist are service engagements to get your new system and lab productive. Success starts here.

The CrossLab Start Up Introduction is delivered after the installation and introduces the operation, ownership, maintenance and troubleshooting of the new system.

This Checklist guides you through the key aspects of owning and operating your software. A signed copy of this checklist is provided for your records.

The CrossLab Start Up First Run Assist is an optional customer driven activity performed under the guidance of the Agilent engineer and reinforces operational understanding. After the first result is reviewed, the service engineer recommends next steps in the path to success and optimum results.

The Instrument Introduction Checklist includes the First Run Assist option and typically, the use of the software is included in the First Run Assist activity for the instrument. For those customers who do not have an instrument connection or would like to try out the software without running their instrument, there is an option for this activity provided in this checklist.

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Introduction

Customer Information

Introduction is intended to give operators a basic overview of the operation and maintenance of new instruments and software systems and is not designed to be a substitute for a full operator-training course.

Further training, advice, and consultation can be found at https://www.agilent.com/en/training-events.

The following are **NOT** included in Introduction service (**unless explicitly ordered**):

- Training on basic PC operation, peripherals, and/or operating systems
- Training of groups larger than five people
- Customized method/application development or method optimization.
- Method transfer from other instrumentation
- Comprehensive training
- Troubleshooting and Maintenance training
- Macro programming, customized reports, databases, etc.
- Fundamentals/theory of instrument techniques
- First Run Assist – used to demonstrate the system workflow.
- **InfinityLab LC Series User Documentation**

  The InfinityLab LC Series User Documentation on the USB stick (delivered with the system) contains the introductory information, which will be used as a guide during introduction. Please make sure the InfinityLab LC Series User Documentation is available.

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Customer Responsibilities

Virtual introduction tutorial/eLearning is recommended for all participating end users.

Please follow along to confirm that applicable checklist tasks are executed during Introduction

The manuals/media delivered with the system will be used as a guide during Introduction.

- Please make sure that they are available.
- Please follow along to confirm that applicable checklist tasks are executed during Introduction.

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Important Customer Web Links

- To access Agilent training and education, visit https://www.agilent.com/chem/training to learn about training options, which include online, classroom and onsite delivery. A training specialist can work directly with you to help determine your best options.
- To access the **Agilent Resource Center** web page, visit https://www.agilent.com/en-us/agilentresources.

  The following information topics are available:

  - Sample Prep and Containment
  - Chemical Standards
  - Analysis
  - Service and Support
  - Application Workflows
- The **Agilent Community** is an excellent place to get answers, collaborate with others about applications and Agilent products, and find in-depth documents and videos relevant to Agilent technologies. Visit https://community.agilent.com/welcome
- Videos about specific preparation requirements for your instrument can be found by searching the **Agilent YouTube** channel at https://www.youtube.com/user/agilent
- **Need to place a service call?**
  https://www.agilent.com/en/promotions/flexible-repair-options

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Service Engineer's Responsibilities

- Provide a printed copy of the checklist to the customer to look at during Introduction.
- Discuss Introduction topics and agree upon focus areas with customer.
- Only complete and print out sections that relate to the system that has been installed.
- Complete empty fields with the relevant information.
- Complete the relevant checkboxes in the checklist using a "X" or tick mark ✓.
- Check "**Section not applicable**" check boxes to indicate services/tasks not delivered, as appropriate.
- Complete the **Service Review** section together with the customer.
- Complete the fields for page numbers at the foot of each selected page.
- Add relevant page numbers to selected pages and complete the total number of pages field in the Service Verification section.
- Complete Signature Page and attach Signature Page to Service Order.

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Software Introduction

General Introduction — Preparation

- ☐ Ensure that all user manuals, documentation, tools, etc. provided by or relevant to the system were installed during installation and before starting Introduction. These are excellent reference tools for the customer – both during the Introduction, and after the Installation and Introduction has been completed.
- ☐ **Note:** Indicate what may be loaded onto other PCs not directly interfaced with the instrument.
- ☐ Provide customer with an **overview of their system** what software they have installed and indicate the parts of the system that Introduction will be provided on.
- ☐ Identify associated PC hardware and connections, including power connections, keyboard, mouse, and display connections, and printer and LAN interface connections.
- ☐ Describe where to find the resources available (e.g. software manuals, user guides, online help, software support, release notes) for the software/applications.
- ☐ Demonstrate how to use the online and offline help.

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System Information

☐ See the installation checklist and verify the signature date _____ .

☐ Check this box if an instrument configuration report is attached instead of completing the table.

Software / Product Numbers	Revision	License Number
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

Software Start-Up

- ☐ Explain configuration, dependencies, and interactions of installed software components.
- ☐ Explain how to log on and how to change passwords (if applicable).

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Method Development Solution Introduction

- ☐ Review with the customer hardware components purchased with the Method Development Solution and indicate the components that introduction will be provided on.
- ☐ Show the Method Development Solution System Manual and MCT User Manual.
- ☐ Explain functionality of Method Development System.
- ☐ Explain important features and handling procedures of the MCT in manuals:
  - Guidelines for a column selector valve like the replacement of valve heads
  - Waste line
  - Bypass
  - Blocking of unused port positions
  - Transportation lock
  - Preventive maintenance
  - Diagnostic procedures
  - Specifications
  - Flushing procedures
- ☐ Explain how to prepare the LC system before starting. See Best Practices for Using an Agilent LC System Technical Note (SD-29000194).

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Software Configuration for Method Development Solutions

- ☐ Explain the setup of an MCT valve cluster (if applicable).
- ☐ Explain the color assignment and configuration of the columns. Configure at least two columns with different temperature limits to set up a demo MSW campaign later on.

  For example:

  - Column Poroshell 120 EC-C18, 4.6 x 100 mm, 2.7 µm, T (695975-902T) with a temperature limit of 60 °C, and
  - Column SB-C18, 4.6 x 50 mm, 1.8 µm, 600 bar (827975-902) with a temperature limit of 40 °C

- ☐ Explain the usage of the column catalog.
- ☐ Explain the setup of a pump cluster and show how to configure the solvent table of the pump cluster (if applicable).

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Method Scouting Wizard Acquisition

- ☐ Explain the basic idea of the Method Scouting Wizard (MSW) as a method and sequence creator.
- ☐ Explain the meaning of the base method as an initial starting method and explain the base method requirements.
- ☐ Show in 10 steps how to set up a simple MSW campaign with temperature and column screening only.
  - ☐ Generate some exclusion conditions using incompatible high temperature selections.
  - ☐ Briefly explain the flush volume calculation and refer to the user manual for further details.
  - ☐ Show how to select the vial positions.
- ☐ Import and load a demo MSW campaign and review the method and sequence generation.
- ☐ Explain the possibilities to reprocess the sequence campaign, e.g. to improve the integration of the acquired MSW data.

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Reporting

- ☐ Show the location of the different MSW templates.
- ☐ Show how to apply the **Easy Method Filter** and generated an MSW report (e.g. MethDev Summary Performance Report).
- ☐ Briefly explain the outcome of the report table and the bubble plot.

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Method Scouting Wizard Help and Learning

- ☐ Launch Method Scouting Wizard Help and show the **Table of Contents**.
- ☐ Explain possible applications and show how to access the application finder for LC Method Development Applications https://www.agilent.com/en/promotions/applicationfinder.
- ☐ Show where to find more Method Development documents like the Agilent LC Method Development Applications Notebook or the LC Handbook on www.Agilent.com.
- ☐ Show the availability of the different Agilent LC Column Method Development Kits for analytical LC method development.
- ☐ Provide the link to the videos of the Method Scout Wizard Tutorial Series.
- ☐ Show additional training for Agilent Method Development Systems. Show and describe the following available course:
  - LC Method Scouting Consultancy Service (R4451A): A service for helping customers to get started with the Method Development Software.

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Software Maintenance and Diagnostics

- ☐ Discuss appropriate software maintenance procedures with the customer.
- ☐ Discuss the importance of regular backups for support situations.
- ☐ Discuss the safe storage of the software media, licenses etc provided with the system.
- ☐ Discuss software updates and compatibility initiated by local IT department.

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Service Review

- ☐ Attach available reports/printouts to this documentation.
- ☐ Complete the Service Engineer Comments section below, if applicable.
- ☐ Explain how to log an instrument service call and what support services are available.
- ☐ If not covered during the Installation, explain the Agilent Warranty policy.
- ☐ Perform a review of Agilent's website and web links listed in “Important Customer Web Links”.
- ☐ Discuss with the customer their training needs and present additional training options available through Agilent training and education and custom on-site consulting.
- ☐ Complete Signature Page and attach Signature Page to Service Order.

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Signature Page

Service Engineer Comments (optional)

If there are any specific points you wish to note as part of performing the installation or other items of interest for the customer, please write in this box.

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Service Verification

Service Request Number:

……

Date Service Completed:

……

Service Engineer Name:

……

Customer Name:

……

Service Engineer Signature:

……

Customer Signature:

……

Total number of pages in this document:

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