Agilent CrossLab Start Up Services

Agilent OpenLab ChemStation LTS 01.11 Workstation Installation Checklist

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

This CrossLab Start Up Installation Software Checklist is used as an activity guide for setting up your new software. A signed copy of this checklist is provided for your records.

Introduction

Customer Responsibilities

- Customers should provide all necessary operating supplies, licenses etc. upon request of the engineer.

- The manuals/media delivered with the system will be used as references. Please make sure that they are available.

- A customer representative should be available to the engineer while performing the installation. Some installation tasks will be beneficial to you if you are present – refer to sections in this checklist

- Availability of a **system/network administrator** as needed to connect to your intranet.

- While Agilent is delivering **Installation and Introduction** services, users of the software should be present throughout these services; otherwise, they will miss important operational and maintenance information. Especially important sections of the checklist are noted by "**Customer presence recommended**".

Not Included at Installation

- Training on LAN.

- Connecting the instrument to the customer's network (available as an additional service).

- PC/Software backup recovery (unless it has been purchased or available upon time/material).

Important Customer Web Links

- To access Agilent training and education, visit http://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

- Maintenance & Repair: Maintenance & Repair | Agilent

- To access **Agilent SubscribeNet**, visit https://agilent.subscribenet.com. SubscribeNet is an online software and license delivery, update, and management service that provides you easy access to the latest versions of your software and licenses.

Service Engineer's Responsibilities

- Only complete/printout pages that relate to the system being 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.

Additional Instruction Notes

- For detailed installation procedures, refer to the *Workstation Installation* guide (**CDS_CS_Install-WS.pdf***)* under Disk1\Docs.

Software Installation

System Information

☐ 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.		

Bundled Computer Hardware Information

☐ Section not applicable.

List the PC Name, Network Components and/or Peripherals	Model Number	Serial Number
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		

Preparation

☐ Unpack/verify the condition and completeness of shipment. For discrepancies, use the following table.

Product or Part Description	Observation	Action

☐ Discuss any specific questions or issues with the customer before starting.

☐ Discuss any configuration options with the customer before starting.

☐ Check for Hotfix, Microsoft updates, and patch compatibility appropriate for the customer's system. Critical Note: Current Microsoft updates and Windows version must be installed in the customer provided PC before installation can begin.

☐ Check for required service note applicability and firmware updates if connecting to instruments.

☐ Locate appropriate license authorization codes and/or license certificates and verify against sales order.

☐ **Upgrades only** – Ensure with the customer that instrument control settings, data, methods etc. have been properly saved or archived before starting any installation procedures.

☐ To prepare the system, follow *chapter 1 Prepare Your PC* in **the workstation installation guide**

☐ Check if a printer driver is installed on the system.

☐ Verify that the regional settings are set to the supported local language.

☐ Install and configure TCP/IP hardware if the instrument will be connected using LAN.

☐ Explain that the registration packet, the SubscribeNet login information (users and passwords), and the authorization code must be stored in a secure place.

☐ For systems not connected to the internet, follow the instructions *on CDS_CS_Install-WS.pdf*, section "Improve performance on Offline Machines" in Chapter "Optional Procedures".

☐ Explain the *Software Status Bulletin (SSB)* and *Software Release Bulletin (SRB)*. Links to the bulletins are in the **Software Bulletins.pdf** located under Setup\Tools\Support\History on the installation media.

Installation Procedure

Main Installation Tasks

☐ Log into windows as a local admin if your computer is in a workgroup or as a Domain user who is a local administrator if your computer is in a Domain.

☐ Verify there is no pending reboot for the system.

Bundled PC Installation Tasks

☐ *Section not applicable*

☐ For a Standalone Workstation installation follow the instruction on CDS_CS_setup_PC-Bundle.pdf.

Non-Bundled PC Installation Tasks

☐ *Section not applicable*

☐ *Follow Chapter 1 Prepare your PC on CDS_CS_Install-WS.pdf.*

    ☐ Install and update Windows completed.

    ☐ Install and configure Third Party Tools.

    ☐ Follow chapter before you Begin the installation of OpenLab ChemStation.

    ☐ Run the System Preparation Tool to configure the Operating System.

☐ Go to the next chapter " Install OpenLab ChemStation" and follow the instructions:

☐ Complete the "Post Installation Tasks"

Install or Upgrade Driver Software

Other Agilent instrument driver software or add-on software that is not part of the standard installation must be installed and configured manually (e.g., CTC, Headspace, micro-GC, ELSD).

Data Transfer – from ChemStation B to ChemStation LTS Workstation

☐ **Section Not Applicable** (not on sales order).

Data and method transfer are included for up to four hours using an external hard drive to transfer the data

- Unsupported is data and method transfer using the customer's network or IT infrastructure. Please ask the customer to opt-in to this added service.

- Reasonable, standard checks will be made to ensure that the data is transferred in entirely. These include checks on total transfer size and number of files. Individual file fidelity is not checked – if a file was corrupted on the old system, the file will be transferred to the new system as-is.

- This service does not provide any compliance services relating to data or method integrity. Data and methods are transferred but are not re-analyzed on the new system, nor are legacy methods validated on the new system. The familiarization checklist includes how to train the customer to re-analyze legacy data on the new system and to adapt legacy methods to the new system via OpenLab's built-in method resolution feature.

Data Transfer for Installations on a NEW PC

- Record the file path settings for Sequence, Data, and Method in the **Preferences** window for each instrument in the old ChemStation Rev. B System.

- Wipe the flash drive clean of any residual files, including hidden files and viruses, by re-formatting the drive.

- Copy and paste all the data acquired from the old ChemStation Rev. B System to a flash drive.

- Bring the flash drive to the new PC that has the ChemStation LTS installed. Create a new folder Chem32_old data from CS B locally. Paste all the files copied from the previous step into this folder.

- After paste is finished, to make sure the data transfer is completed, check the total size, total number of folders, and total number of files of the pasted folder by right-click on the folder Properties > General > Size and Contains.

- They must correspond to the original folder on ChemStation Rev. B System.

- Launch each instrument in the new system, and add the paths for Sequence, Data, and Method from the ChemStation Rev. B (folder Chem32_old data from CS B) to the new directory/machine by using the Preferences > Path > Add > function.

- After the directories are added, check on the ChemStation explorer on the left to make sure the added directories for Sequence, Data, and Method are showing.

Data Transfer for Installations on the same PC

- Record the file path settings for Sequence, Data, and Method in the Preferences window for each instrument in the old ChemStation Rev. B System.

- During installation, create a new folder (default: C:\Users\Public\Public Documents\ChemStation) for new data to be stored at.

- Launch each instrument in the new system, and add the paths for Sequence, Data, and Method from the ChemStation Rev. B system to the new directory/machine by using the Preferences > Path > Add function.

- After the directories are added, check on the ChemStation explorer on the left to make sure the added directories for Sequence, Data, and Method are showing.

System Configuration

Follow the CDS_CS_Configure guide to complete the installation.

Configure and Install License

- ☐ Check if customer has an existing account.
- ☐ Review with customer the steps needed to obtain a software license in chapter *5 Licensing > Get a License* in **CDS_CS_Install-WS.pdf**. If necessary, assist customer to obtain a license with SubscribeNet.
- ☐ Explain to customer that the 60-day start-up license starts at first launch of the software and ends 59 days later. A final license must be installed to continue using the software. Do not leave system with 60-day license.
- ☐ Follow chapter *5 Licensing > Install Your License* in **CDS_CS_Install-WS.pdf** to install the downloaded license file(s).

Configure Instruments

- ☐ Create an instrument per chapter *5 Instruments* in **CDS_CS_configure.pdf**.

Instrument created is: _____

Configure Authentication

- ☐ Review the authentication options available with the customer.

☐ Document which configuration option the customer wants:

    o   Internal

    o   Windows Domain

    o   None

☐ Complete configuration per chapter *2 Configuration Guide > Authentication in* **CDS_CS_configure.pdf**.

Configure Security Policy

☐ **Section Not Applicable**

☐ Review the security policy parameters available with the customer.

☐ Document the configuration options the customer wants:

Configuration option	Value selected	Notes

☐ Follow chapter *2 Configuration Guide > Security* in **CDS_CS_configure.pdf** to set the security policy that the customer wants.

Configure Security and Storage, if applicable

☐ Launch the OpenLab Control Panel and navigate to Administration

☐ Select System Configuration in the Navigation Window then click Edit System Configuration.

☐ Configure the Authentication Provider and Network Storage Location to desired settings.

Configure Users/Group/Roles

☐ **Section Not Applicable**

☐ Follow chapter *3 Configuration Guide > User Management* in **CDS_CS_configure.pdf** to create/import users/groups, assign users to groups, and assign roles to user/groups.

☐ Launch the OpenLab Control Panel and navigate to Administration

☐ Select Users in the Navigation Window. Import/Create Users that will have access to the OpenLab ChemStation.

☐ Select Groups in the Navigation Window. Import or Create Groups that will have access to the OpenLab ChemStation.

☐ Select Roles in the Navigation Window. Create/edit Roles and assign Users or Groups to those Roles.

☐ If you use ECM: There are several default roles in both ECM and ChemStation. In both systems, you must assign a specific role to each group. Roles and privileges must be configured separately for ECM and ChemStation.

☐ The privileges set in ECM define the accessible content and functions in ECM

☐ The privileges set in the OpenLab Control Panel define the instrument privileges, the functions that are available in ChemStation, and which administrative tasks can be carried out in the OpenLab Control Panel.

☐ For details, refer to Chapter 3 User Management in the Configuration Guide - CDS_CS_Configure.pdf.

Startup

☐ Launch an online Instrument and verify communication to the instrument has been established.

☐ If there is no online instrument, launch the Offline ChemStation session.

☐ If available, start the Agilent Lab Advisor software and verify connection.

System Maintenance Procedures

Show the customer where to find system maintenance procedures chapter 1 *Shared Services maintenance Tool* in **CDS_CS_Maintenance.pdf**.

Software Product Options

Optional Installation Tasks

☐ Section not applicable.

☐ Additional software installed and/or registered

Product or Part Description	Version	Notes

Service Review

☐ Attach available reports/printouts to this documentation.

☐ Record the time/date of installation or upgrade completion in the customer's records/logbook.

☐ Complete the following Service Engineer comments section if there are additional comments.

☐ Review the installation/upgrade with the customer.

☐ Explain Agilent warranty for software (media only).

☐ Explain how to use manuals, guides, and online help.

☐ Explain how to get self-help, and FAQs online.

☐ Explain how to log a software service call and support services that are available.

☐ Advise customer of additional instrument training options.

☐ If the instrument firmware was updated, record the details of the change in the service engineer's comments box or if necessary, in the customer's IQ records.

☐ Complete Signature Page and attach Signature Page to Service Order.

Signature Page

Service Engineer Comments (optional)

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

Service Verification

Service Request Number:

Date of Service Completion:

Service Engineer Name:

Customer Name:

Service Engineer Signature:

Total number of pages in this document: