

Agilent CrossLab Start Up Services

Agilent OpenLab ChemStation LTS 01.11 Workstation Installation Checklist

Thank you for purchasing 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>
- Need to place a service call? [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 with 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 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\x\assets\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 connected 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 **CDS_CS_Install-WS.pdf**.
- ☐ 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 instructions on CDS_CS_setup_PC-Bundle.pdf.
- ☐ Run the System Preparation Tool from the **Planning Page** to configure the Operation System.

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 from the **Planning Page** 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., PAL, Headspace, micro-GC, ELSD).

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 the customer to obtain a license with SubscribeNet.
- ☐ Explain to the 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 the 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

Refer to Chapter *2 Configuration Guide > Authentication* in **CDS_CS_configure.pdf**.

- ☐ Review the authentication options available with the customer.
- ☐ Document which configuration option the customer wants:
 - Internal
 - Windows Domain
 - None

Configure Security and Storage

☐ Section Not Applicable

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

- ☐ Launch the OpenLab Control Panel and navigate to Administration.
- ☐ Review the security policy parameters available with the customer.
- ☐ Select System Configuration in the Navigation Window then click Edit System Configuration.
- ☐ Configure the Authentication Provider and Storage type to desired settings.
- ☐ If an authentication provider is used, create an administrator user with everything privileges.
- ☐ Have the customer log in to the OpenLab Control Panel to verify access.
- ☐ Administrator user created in OpenLab Control Panel _____.
Customer logon successful _____.
- ☐ Recommend the customer create a second administrative user and the customer import other users as appropriate.
- ☐ Document the configuration options the customer wants:

Configuration option	Value selected	Notes

Configure Users/Groups/Roles

Follow Chapter 3 *Configuration Guide > User Management* in **CDS_CS_configure.pdf**

- ☐ If Internal authentication, follow Chapter 3: User Management in **CDS_CS_configure.pdf** to create users/groups, assign users to groups, and assign roles to user/groups.
- ☐ For Windows Domain authentication, follow Chapter 3: User Management in **CDS_CS_configure.pdf** to import users/groups and assign roles to users/groups.

- ☐ If using ECM: There are several default roles in both ECM and ChemStation Edition. 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.

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: