

Agilent OpenLab CDS ChemStation Edition C.01.10

Installation Checklist - Networked and Distributed System

Thank you for purchasing Agilent software. This checklist is used by the installing engineer to ensure that the instrument and associated systems are correctly installed, upgraded, and functioning as designed in your facility. This checklist will be completed at the end of the service and provided to you as a record of the installation.

Introduction

Customer Responsibilities

- 1 Customers should provide all necessary operating supplies, licenses etc. upon request of the engineer.
- 2 The manuals/media delivered with the system will be used as references. Please make sure that they are available.
- 3 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

Important Customer Web Links

- Videos about specific preparation requirements for your instrument can be found by searching the *Agilent YouTube* channel: [Agilent Technologies - YouTube](#)
- To access *Agilent University*, visit <http://www.agilent.com/crosslab/university/> 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.
- A useful *Agilent Resource Center* web page is available, which includes short videos on maintenance, quick lists of consumables for new instruments, and other valuable information. Check out the Resource Page here: <https://www.agilent.com/en-us/agilentresources>
- Need technical support, FAQs, supplies? – visit our *Support Home page* <http://www.agilent.com/search/support>
- Get answers. Share insights. Build connections:
Join the *Agilent Community* at <https://community.agilent.com/welcome>

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.
- Ask the customer to sign the Service Completion section including the customer's and your signature.

Additional Instruction Notes

- For detailed Installation procedures, refer Networked and Distributed System Installation Guide - CDS_CS_Install_NwWS-DS.pdf under Disk1\Docs.

Software Installation

System Information

Check this box if a software 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.		

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.
- 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.
- Check that any customer-supplied hardware and software meets the requirements in the Agilent OpenLab CDS ChemStation Edition C.01.10 – Site Preparation Checklist.
- Check if a printer is installed on the system.
- Explain that the registration packet, the SubscribeNet login information (users and passwords), and the authorization code must be stored in a secure place.

Installation Procedure

Main Installation Tasks

- Make sure the customer has prepared a server which is complying the HW and Operating system requirements following the Side Prep documents.
- Follow Chapter 2 Prepare your PC on *CDS_CS_Install_NwWS-DS.pdf*.
- Go to the next chapter "Install the Software" and follow the instructions
 - Installation steps for a distributed system:
 - a** Install an Analytical Instrument Controller
 - b** Install a Client
 - Installation steps for a networked Workstation:
 - a** Install a Networked Workstation
- Complete the "Post Installation Tasks"

System Configuration

- Follow the configuration guide (*CDS_CS_Configure.pdf*) to complete the installation
- Add License
 - Check if customer has an existing account.
 - Guide the customer through the license creation process in SubscribeNet.
 - Add valid license(s) before leaving, do not leave system with 60-day license.
 - Create and add the license in OpenLab Control Panel.
- Configure Instruments
 - Launch the Control Panel and navigate to Instruments.
 - Click Create in the ribbon to create a new instrument.
 - Select the new instrument and click **Configure Instrument** in the ribbon.
 - For instruments that support Auto Configuration, it is recommended that you use Auto Configuration to configure your instruments:
Select a module, click Auto Configuration, and provide the instrument's IP address or hostname.

- Configure Users/Groups/Roles, if applicable
 - 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 CDS Workstation.
 - Select Groups in the Navigation Window. Import or Create Groups that will have access to the OpenLab CDS Workstation.
 - 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 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.
 - For details, refer to the User Management chapter in the Configuration Guide - CDS_CS_Configure.pdf.

Startup

- From the OpenLab Control Panel, launch an online Instrument ChemStation session. Verify communication to the instrument has been established.
- If there is no online instrument, launch the Offline ChemStation session.
- If present, start the Agilent Lab Advisor software and verify connection

Signature Page

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.

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.

Service Completion

Service request number _____ Date service completed _____

Agilent signature _____ Customer signature _____

Total number of pages in this document _____

