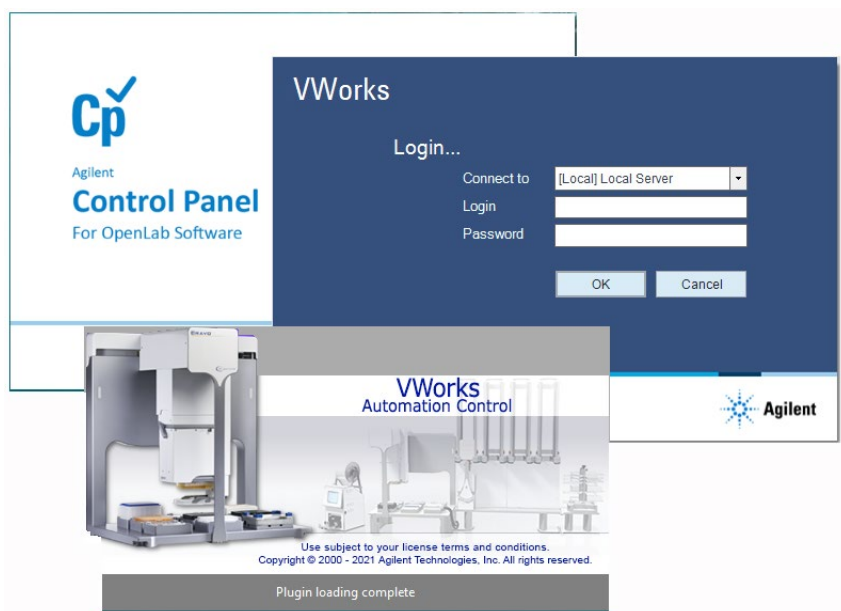


Agilent CrossLab Start Up Services

Agilent VWorks Automation Control 14.1.1 Software 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 and software backup recovery (unless it has been purchased or available upon time/material).

Important Customer Web Links

- You can find links to videos, application notes, and other resources at [Lab automation control software, integrated laboratory | Agilent](#)
- The VWorks Knowledge Base is available within the software, and it is also posted online at www.agilent.com/chem/askb
- To access the **Agilent Resource Center** web page, visit <https://www.agilent.com/en-us/agilentresources>.
- 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>
- **Need to place a service call?** [Flexible Repair Options | Agilent](#)

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 Completion section.
- Complete Signature Page and attach Signature Page to Service Order.

Additional Instruction Notes

- For detailed installation procedures, see the [VWorks Automation Control 14.1.1 Installation Guide](#) (part number D0005579).
- The VWorks 14.1.1 user documentation is available in the VWorks Knowledge Base, which is installed with the software. This Knowledge Base includes the following:
 - [VWorks Plus Configuration and Administration Guide](#) and [VWorks Plus Quick Reference](#)
 - [VWorks Standard Configuration and Administration Guide](#) and [VWorks Standard Quick Reference](#)
 - [VWorks Automation Control Setup Guide](#)
 - [VWorks Automation Control User Guide](#)
 - [VWorks Protocol Author Quick Guide](#)
 - User Guides for devices supported in VWorks 14.1.1, such as [Bravo Platform User Guide](#)
- PDFs of the user guides are installed in the following folder by default:
C:\Program Files (x86)\Agilent Technologies\VWorks\UserGuides

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

Bundled Computer Hardware Information

- ☐ Section not applicable

List the PC Name, Network Components and/or Peripherals	Model Number	Serial Number

List the PC Name, Network Components and/or Peripherals	Model Number	Serial Number

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.
- ☐ Locate appropriate license authorization codes and/or license certificates and verify against sales order.
- ☐ Discuss any configuration options with the customer before starting.
- ☐ LAN connections. The Agilent-computer has two Ethernet ports. One connects to the automation device or system. The second Ethernet port may be used to connect to the customer's company LAN.
- IMPORTANT:** Always verify the computer LAN connection to the automation device before connecting any other networks.
- ☐ Determine which authentication type the customer wants for user management and indicate the selection here.

Authentication Type	Description	Type Selected?
Internal (default)	Users are created in OpenLab Control Panel.	
Windows Domain	Users are imported from Windows Domain and assigned to VWorks groups in OpenLab Control Panel.	

- ☐ Ensure that the computer meets the specifications detailed in the *VWorks 14.1.1 Site Preparation Checklist*. An Agilent-supplied computer should already meet the requirements.
- ☐ Check that the Windows build is the same as the one specified in the Site Preparation Checklist. This build has been verified to work with VWorks 14.1.1.
- ☐ Check for required Service Note applicability, software patches, and firmware updates if connecting to instruments.
- ☐ If applicable, install your automation devices, including power and communication cables.
- ☐ Ensure that the LAN-cable is connected, for example, the connection between the computer and the automation device. If the LAN cable is not connected, the OpenLab for VWorks installation may fail.
- ☐ Locate the installation type in the following table and follow the corresponding checklist instructions.

Installation Type	Checklist Instructions
New VWorks installation	<ol style="list-style-type: none"> 1. Install OpenLab for VWorks per Installation Procedure Section 1. 2. Install VWorks per Installation Procedure Section 2. 3. Configure OpenLab Control Panel per OpenLab Control Panel Configuration. 4. Set up VWorks 14.1.1 per VWorks Setup.
Upgrade from VWorks 14.0 or 14.1 to same edition (Standard or Plus) in VWorks 14.1.1	See Installation Procedure Section 3 .
Upgrade from VWorks 14.0 or 14.1 to different edition (Standard or Plus) in VWorks 14.1.1	See Installation Procedure Section 4 .
Upgrade or change VWorks 14.1.1 edition (Standard or Plus)	See Installation Procedure Section 4 .
Upgrade from VWorks 13.1.x or earlier	See Installation Procedure Section 5 .

Installation Procedure


Refer to the [VWorks Automation Control 14.1.1 Installation Guide](#) for detailed instructions on these checklist sections.

During the software installation, you will be prompted for system administrator login credentials. If this is a new installation, use the following credentials:

User name/Login: *admin*
 Password: *openlab*


Section 1. OpenLab for VWorks Installation

Note: The installation wizard will prompt you to reboot if the computer does not have all the prerequisites. Ensure that you save any work in process before continuing.

- ☐ Log on to Microsoft Windows as a local administrator.
- ☐ Copy the entire contents of the supplied USB drive to the **C:\Temp** folder on the computer, and then remove the USB drive from the computer.
- ☐ Unzip the **OpenLabForVWorks_2.6.0.841.zip** archive to **C:\Temp**.
- ☐ To run OpenLab for VWorks installer, double-click the **OpenLabForVWorks_2.6.0.841.exe** file:
 - ☐ In the installation wizard, choose the edition for which you have a valid license: **VWorks Plus** or **VWorks Standard**.
 - ☐ Follow the installation wizard instructions to restart the computer when prompted to do so.
Wait for the installation wizard to resume after the restart before continuing.
 - ☐ If you are prompted for Shared Services Administrator Credentials, log in using system administrator credentials.
 - ☐ In the Wizard Completed page, verify that the message "successfully installed OpenLab for VWorks" appears.
If the installation was not successful, rerun the installer.
- ☐ Check the OpenLab Control Panel installation .
- ☐ *VWorks Plus only.* Install OpenLab ECM XT v2.6 Update 03 to address security vulnerabilities.
- ☐ If the customer wants to use Windows Domain instead of OpenLab Internal (default) authentication, change this setting in the OpenLab Control Panel before proceeding.
 - ☐ Refer to the [Configuration and Administration Guide](#) for the VWorks edition for instructions on OpenLab Authentication settings.

IMPORTANT: If the authentication setting is changed to Windows Domain after installing VWorks, the published VWorks groups will be erased. These user groups are associated with all the required roles and privileges for the VWorks software.

Section 2. VWorks Installation

- ☐ Run the VWorks 14.1.1 installer from the C:\Temp\ folder or the Windows desktop as follows:
 - ☐ Double-click the **VWorks_14.1.1.xxxx.exe** file, where xxxx is the build number.
 - ☐ Follow the wizard prompts to install Bravo IQOQ Test Utilities.
 - ☐ When the VWorks Login window opens, log in using system administrator credentials.
 - ☐ Follow the wizard prompts to finish installing Bravo IQOQ Test Utilities, and then install VWorks 14.1.1.
 - ☐ When the VWorks Login window opens, log in using system administrator credentials, and then finish the VWorks installation.
 - ☐ Check the VWorks installation:
 - ☐ Right-click , and then click **Run as administrator** in the shortcut menu. This is required the first time you start VWorks after installation.
 - ☐ Log in and verify that the VWorks window opens.
 - ☐ Ensure that the VWorks menubar, standard toolbar, and control toolbar appear. If necessary, right-click the window, and select these view options from the shortcut menu.
 - ☐ Restart the computer.
 - ☐ Run the Agilent Software Verification Tool to ensure that all the software components installed correctly.
- Note:* The Software Verification Tool does not replace the Bravo IQOQ service. The Bravo IQOQ service is a separate service, which the customer can order from Agilent.
- ☐ Configure OpenLab Control Panel and set up VWorks 14.1.1 per [Software Configuration and Setup](#) section in this checklist.

Section 3. Upgrading VWorks 14.x to the same edition in VWorks 14.1.1

Use the workflow in this section to upgrade from VWorks Standard to VWorks Standard or from VWorks Plus to VWorks Plus.

- ☐ *Section not applicable*
- ☐ Create backup copies of the following items **before** starting any installation procedures:
 - ☐ In VWorks, use **File>Export VZP File** to export backups of current protocols. See the [VWorks Automation Control User Guide](#).
 - ☐ If applicable, export experiment IDs. See the [VWorks Automation Control Setup Guide](#).
- ☐ In Windows, go to **Settings > Apps > Apps & features** and uninstall the following:
 - ☐ Agilent Bravo IQOQ Test Utilities
 - ☐ Agilent VWorks software 14.0 or 14.1
 - ☐ Agilent OpenLab Server 2.5.0.927 (This uninstalls all related OpenLab components.)
 - ☐ Agilent Software Verification Tool
- ☐ Restart the computer.
- ☐ Install the following software:
 - ☐ OpenLab for VWorks software. Follow the instructions in [Section 1](#). make sure you specify the **same edition** that you are upgrading from: VWorks Plus to Plus, or VWorks Standard to Standard.
 - ☐ VWorks software. Follow the instructions in [Section 2](#).
- ☐ Configure OpenLab Control Panel per [OpenLab Control Panel Configuration](#).
- ☐ Set up VWorks 14.1.1 per [VWorks Setup](#).
- ☐ Import the protocols from the previous version that you want to migrate to VWorks 14.1.1. See the [VWorks Automation Control User Guide](#).
- ☐ If applicable, update the Experiments database. See the [VWorks Automation Control Setup Guide](#).
 - ☐ Set up PostgreSQL for the Experiments database and establish connection to the VWorks Experiments database.
 - ☐ Import experiment IDs from the previous version. Note that the VWorks 14.0 database schema is not supported in VWorks 14.1.1.

Section 4. Upgrading VWorks to a different edition in VWorks 14.1.1

Use the workflow in this section to upgrade VWorks Standard to VWorks Plus, or to change a VWorks Plus installation to VWorks Standard. The following instructions are also applicable when upgrading VWorks Standard 14.1.1 to VWorks Plus 14.1.1.

- ☐ *Section not applicable*
- ☐ Create backup copies of the following items **before** starting any installation procedures:
 - ☐ In VWorks, use **File>Export VZP File** to export backups of current protocols. See the [VWorks Automation Control User Guide](#).
 - ☐ If applicable, export all experiment IDs. See the [VWorks Automation Control Setup Guide](#).
- ☐ In Windows, go to **Settings > Apps > Apps & features** and uninstall the following:
 - ☐ Agilent Bravo IQOQ Test Utilities
 - ☐ Agilent VWorks software 14.0, 14.1, or 14.1.1
 - ☐ Agilent OpenLab Server 2.5.0.927 (This uninstalls all related OpenLab components.)
Note: This would be OpenLab Server 2.6.0.841 for a previously VWorks 14.1.1 installation.
 - ☐ Agilent Software Verification Tool
- ☐ Restart the computer.
- ☐ Install the following software:
 - ☐ OpenLab for VWorks software. Follow the instructions in [Section 1](#) in this checklist. Make sure you specify the **VWorks edition**: VWorks Plus or VWorks Standard.
 - ☐ VWorks software. See [Section 2](#) in this checklist.
- ☐ Configure OpenLab Control Panel per [OpenLab Control Panel Configuration](#) section in this checklist.
- ☐ Set up VWorks 14.1.1 per [VWorks Setup](#) section in this checklist.
- ☐ Import the protocols from the previous version that you want to migrate to VWorks 14.1.1. See the [VWorks Automation Control User Guide](#).
- ☐ If applicable, update the Experiments database. See the [VWorks Automation Control Setup Guide](#).
 - ☐ Set up PostgreSQL for the Experiments database and establish connection to the VWorks Experiments database.

- ☐ Import experiment IDs from the previous version. Note that the VWorks 14.0 database schema is not supported in VWorks 14.1.1.

Section 5. Upgrading from VWorks 13.1.x or earlier

- ☐ *Section not applicable*
- ☐ Create backup copies of the following items for safekeeping **before** starting any installation procedures:
 - ☐ Copy the C:\VWorks Workspace\ folder.
 - ☐ Export the full set of Velocity11 registry keys to a file (.reg).

See the [VWorks Automation Control 14.1.1 Installation Guide](#) for instructions.

- ☐ Uninstall any previous versions of the following:
 - ☐ Agilent Bravo IQOQ Test Utilities
 - ☐ Agilent Bravo Metabolomics Workbench, Protein Sample Prep Workbench, and BenchCel Workstations, if applicable
 - ☐ Agilent Software Verification Tool
 - ☐ VWorks software
 - ☐ Ensure that the following folder is not present:
C:\Program Files (x86)\Agilent Technologies\VWorks\Plugins
- ☐ Install the following software:
 - ☐ OpenLab for VWorks software. Follow the instructions in [Section 1](#) in this checklist. Make sure you specify the **VWorks edition**: VWorks Plus or VWorks Standard.
 - ☐ VWorks software. See [Section 2](#) in this checklist.
- ☐ Configure OpenLab Control Panel per [OpenLab Control Panel Configuration](#).
- ☐ Set up VWorks 14.1.1 per [VWorks Setup](#) section in this checklist.
- ☐ Use the VWorks 14.1.1 Migration Wizard to migrate VWorks protocols and associated files from VWorks 12.3, 13.0, or 13.1.x.


OpenLab Control Panel Configuration (Customer presence recommended)

A customer system administrator should be present for this section.

Refer to [VWorks Standard or VWorks Plus Configuration and Administration Guide](#) for detailed instructions.

Licenses

☐ Section not applicable

- ☐ To locate the guide, in the Windows Start menu go to **Agilent Technologies > VWorks Knowledge Base**. In the **VWorks Installation and administrator guides** topic, click the **Administrator Guide** link for your edition (VWorks Plus or VWorks Standard).
- ☐ Explain 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.
- ☐ In **OpenLab Control Panel** , review with customer the steps to obtain a software license. If necessary, assist customer in obtaining a license with SubscribeNet.

User Management--Internal Authentication

Complete this section if Control Panel > Administration > System Configuration > System Settings > Authentication provider is Internal.

- ☐ Section not applicable
- ☐ In **Control Panel**, open the **Security Policy** page and show how to configure the security policy.
- ☐ Document the Control Panel security policy configuration options the customer wants:

Configuration option	Value selected	Notes

- ☐ Open the **Users** page and show how to create users.
 - ☐ Explain **Everything role** for system administrator. Advise that a primary and a backup be assigned the Everything role.
 - ☐ Show how to assign the created users to the predefined **VWorks groups**: VWorks Administrator, VWorks Technician, VWorks Operator, or VWorks Guest.
 - ☐ Explain that **VWorks groups** have the VWorks roles, plus the project and instrument privileges required to use the VWorks software.

User Management--Windows Domain Authentication

Complete this section if Control Panel > Administration > System Configuration > System Settings > Authentication provider is Windows Domain.

- ☐ *Section not applicable*

IMPORTANT If the authentication is changed to Windows Domain after installing VWorks 14.1.1, reinstall VWorks 14.1.1 to republish the predefined VWorks groups.

- ☐ In **Control Panel**, open the **Security Policy** page.
 - ☐ Explain that only the inactivity time can be configured in Control Panel.
 - ☐ All other parameters are defined by the Windows operating system.
- ☐ Open the **Users** page and show how to import users.
 - ☐ Explain **Everything role** for system administrator. Advise that a primary and a backup be assigned the Everything role.
 - ☐ Show how to assign the imported users to the predefined **VWorks groups**: VWorks Administrator, VWorks Technician, VWorks Operator, or VWorks Guest.
 - ☐ Explain that **VWorks groups** have the VWorks roles, plus the project and instrument privileges required to use the VWorks software.
- ☐ If applicable, explain how to import Windows groups.
 - ☐ Show how to assign the imported groups to VWorks and Instrument **roles**.
 - ☐ Show how to assign project permissions to the imported groups on the Projects page.
 - ☐ Show how to assign instrument permissions to the imported groups on the Instruments page.

Projects and Instruments Pages Overview

- ☐ *Section not applicable*
- ☐ Explain that the Projects and Instruments pages are configured automatically.
- ☐ In **Control Panel**, open the **Projects** page and show the VWorks project settings.
- ☐ Open the **Instruments** page and explain that an *instrument* in this case refers to the VWorks computer.
- ☐ Explain that project and instrument privileges are required to use the VWorks software. These privileges are included in the provided VWorks groups.

VWorks Plus Project Configuration

- ☐ *Section not applicable*
- ☐ In **Control Panel**, open **Projects** page and show the VWorks project settings.
- ☐ Explain that VWorks Plus stores the files in Content Management at /VWorks Projects/VWorks/.
- ☐ Explain how to launch Content Browser. From Windows Start menu go to **Agilent Technologies > Content Browser**.
- ☐ Show how to set up audit comments for the project.
- ☐ Explain how to configure the project signature levels.

E-mail Server

- ☐ *Section not applicable*
- ☐ Explain how to configure e-mail server in Control Panel.
- ☐ Explain that the e-mail option must be selected in the VWorks Options dialog box.

Data Backup Utilities

- ☐ Describe the data back-up procedures and where to find the procedures in the *VWorks Standard or Plus Configuration and Administration Guide*.
 - ☐ *VWorks Plus*. Show how to open the **Backup and Restore utilities**.
 - ☐ *VWorks Standard*. Show how to open the **Shared Services Maintenance utility**.

VWorks Setup

General Setup (Customer presence recommended)

- ☐ Start the VWorks software and determine applicable setup tasks for customer.
See *VWorks setup workflow* in the [VWorks Automation Control Setup Guide](#).
- ☐ Explain labware entries and liquid classes.
- ☐ *If applicable*, show customer how to migrate protocols from previous VWorks version.

VWorks Plus Setup (Customer presence recommended)

- ☐ *Section not applicable*
- ☐ Demonstrate how to set audit trail options. Refer to *Setting audit trail options* topic in [VWorks Automation Control Setup Guide](#).
Note: The first time you save a change in the Options dialog box, the error/macro library file doesn't exist messages appear. Click Yes to create the error and macro library files.
- ☐ Set up and establish connection to E-Signatures database (PostgreSQL).
See *Setting up and connecting VWorks E-Signatures database*.

Database Setup

- ☐ *Section not applicable*
- ☐ Set up and establish connection to Experiments database (PostgreSQL). See *Setting up and connecting VWorks Experiments database* in the [VWorks Automation Control Setup Guide](#).
- ☐ *MinHub only*. Establish connection to Inventory database (MySQL) for tracking labware in storage. See *Setting up and connecting to Inventory database* in the [VWorks Automation Control Setup Guide](#).

Device Setup

- ☐ *Section not applicable*
- ☐ Refer to the applicable device-specific installation checklist for details. For example, to connect to a Bravo Platform, see the [Bravo Platform Installation Checklist](#).
- ☐ If the customer has a Bravo Platform, advise them that the Bravo IQOQ service is a separate purchase that requires a reagent kit in addition to the software.


Software Product Options

Optional Installation Tasks

- ☐ *Section not applicable*
- ☐ List any additional software installed

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. Demonstrate the Context-Sensitive Help button  in the VWorks software.
- ☐ 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 application 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 installation 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:

Customer Signature:

Total number of pages in this document: