Agilent Migration Tools for OpenLab
OpenLab CDS ChemStation and EZChrom Edition to OpenLab CDS Workstation

User Guide
Notices

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In This Guide

This guide provides step-by-step instructions for migrating data, instrument information, and user information, from OpenLab CDS ChemStation Edition, ChemStation, and OpenLab CDS EZChrom Edition to OpenLab CDS Workstation version 2.4 using the Migration Tools for OpenLab (Migration Tools).

1 Introduction

This chapter provides an overview of the migration process using the Migration Tools for OpenLab.

2 Preparing for Migration

This chapter provides information about the pre-migration setup.

3 Migrating Data from ChemStation Edition and ChemStation B

This chapter contains procedures for migrating data from OpenLab CDS ChemStation Edition or ChemStation B to OpenLab CDS Workstation using the Migration Tools for OpenLab. The Migration Tools export raw and results data, shared services information, instrument configuration, and user roles.

4 Migrating Data from OpenLab CDS EZChrom Edition

This chapter contains procedures for migrating data from OpenLab CDS EZChrom Edition Workstation to OpenLab CDS Workstation using the Migration Tools for OpenLab. The Migration Tools export raw and results data, shared services information, project information, instrument information, users/groups, and roles/privileges.

5 Post-Migration Data Verification

This chapter contains procedures for verifying the data and instrument information were migrated successfully.

6 Troubleshooting

This chapter provides information about some common errors that you may encounter while migrating data from OpenLab CDS ChemStation Edition or OpenLab CDS EZChrom Edition to OpenLab CDS 2 using the Migration Tools for OpenLab.
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Migration Overview 4

This guide provides step-by-step instructions for migrating data, instrument information, and user information, from OpenLab CDS ChemStation Edition, ChemStation B, and OpenLab CDS EZChrom Edition to OpenLab CDS Workstation using the Migration Tools for OpenLab (Migration Tools).

This chapter provides an overview of the migration process using the Migration Tools for OpenLab.

For information on how to perform migrations without using the Migration Tools, and for information on how to migrate methods, see the Migration User Guide for your particular systems.
Introduction

Migration Overview

The Migration Tools simplify the migration process by dividing it into the following three stages:

• Planning – Prepare for the migration by reading this guide and performing pre-migration setup.
• Export – Transfer the data from OpenLab CDS ChemStation Edition, ChemStation B, or OpenLab CDS EZChrom Edition to your export location.
• Import – For OpenLab CDS ChemStation or EZChrom Edition, transfers the data from the export location to OpenLab CDS project folders. For ChemStation B, transfers the data to a staging location. From there, you can load supported files into OpenLab CDS Workstation. When installing OpenLab CDS 2.4 or higher, setup and import of migration data happens as part of the installation procedure.

NOTE

The Migration Tools function differently for Export from OpenLab CDS ChemStation Edition, ChemStation B, and OpenLab CDS EZChrom Edition. Make sure to follow the instructions for the product you are using.

The following figure summarizes the export and import stages of the migration process for OpenLab CDS ChemStation and EZChrom Edition.
1 Introduction

Run Migration Tools for OpenLab
Launch Migration Tools Export Utility
- Runs ChemStation or EZChrom Analysis
- Verifies projects (EZChrom)
- Verifies Users and Groups
- Verifies Roles
- Verifies Instruments
- Set Data and Export locations
- Checks file size for configuration and result data export
- Starts export
- Completes export

Launch Migration Tools Import Utility from CDS 2 Installer
- Select export location
- Create staging location
- Set default password (if needed)
- Start import
- Complete import
Verify imported data

Figure 1. Data migration workflow overview
Introduction

This document also provides the following information to help you complete and verify the migration successfully:

• Post-Migration Data Verification – provides information on checklist and tasks after the migration tool has transferred the data.
• Troubleshooting – lists error messages and possible solutions.
2  Preparing for Migration

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This chapter provides information about the pre-migration setup. Once you complete the pre-migration setup, go to the appropriate chapter for instructions on how to migrate data for your system:

Chapter 3, “Migrating Data from ChemStation Edition and ChemStation B,” starting on page 13
Chapter 4, “Migrating Data from OpenLab CDS EZChrom Edition,” starting on page 53
Planning the Migration

Planning is the first step to ensure that you have what you need to successfully migrate your data using the Migration Tool. Review the following sections to prepare for data migration.

- “Site Preparation”
- “Hardware Requirements”
- “Migration Tools Compatibility”
Site Preparation

Before starting the migration, make a note of the connected instruments and drivers on the source OpenLab CDS (ChemStation or EZChrom Edition.)

Refer to the OpenLab CDS Requirements Guide, the firmware guide, and the driver release notes to confirm compatibility and supportability with the OpenLab CDS system, and update firmware, if needed.

NOTE

You cannot make configuration changes, such as IP address, during the migration.
Preparation for Migration

Hardware Requirements

Ensure that you are compliant to the following hardware requirements:

- Export destination - USB drive or network location with enough capacity to transfer the exported data and results from the OpenLab CDS ChemStation Edition, ChemStation Bi, or OpenLab CDS EZChrom Edition to OpenLab CDS version 2.x.
  - When using a shared network location, it is recommended that you export to a local location first, copy the export package to the shared location, then copy the data to a local drive on the import machine.
- Import PC - Memory and disk space must satisfy the requirements in the OpenLabCDSRequirements.pdf available with OpenLab CDS version 2. Make sure there is at least enough disk space to hold over two times the data that are currently found within the default data location in your OpenLab CDS ChemStation Edition or ChemStation B (usually C:\Chem32) or OpenLab CDS EZChrom Edition.

**Notes for in-place (single-computer) migration of OpenLab CDS ChemStation Edition or OpenLab CDS EZChrom Edition**

After using the Migration Tools to export the OpenLab CDS ChemStation Edition or EZChrom Edition files, you must uninstall OpenLab CDS ChemStation Edition or EZChrom Edition, and make sure the computer meets all the hardware and software requirements for OpenLab CDS version 2.x before proceeding.

- Make sure your OpenLab CDS ChemStation Edition or EZChrom Edition is completely uninstalled. Contact Agilent technical support and refer to software removal documentation and follow the instructions to make sure all files are properly removed.
Preparing for Migration

Migration Tools Compatibility

Ensure that the source and target machines are compatible with the Migration Tools for OpenLab:

**OpenLab CDS ChemStation Edition (source)**
- OpenLab CDS ChemStation Edition Workstation only.
- OpenLab CDS ChemStation Edition C.01.05, C.01.06, and C.01.07 SR1, SR2, SR3.
- File system only (Data Analysis add-on not supported).
- For domain authentication, single domain only is supported.
- When using domain authentication, the target machine must be in the same single domain as the source machine.

**ChemStation B (source)**
- ChemStation B.04.03 SP2.
- Workstation only.
- Data to be migrated must reside in either the default C:\Chem32 folder or in a \Chem32 folder in a separate location defined using the Preferences feature of ChemStation.

**OpenLab CDS EZChrom Edition (source)**
- OpenLab CDS EZChrom Edition A.04.06 and A.04.07, and A.04.07 SR1 and SR2 Workstation only.
- File system only, including AFS (Data Analysis add-on not supported).
- For domain authentication, single domain only is supported.
- When using domain authentication, the target machine must be in the same single domain as the source machine.

**OpenLab CDS (target)**
- File system only (OpenLab CDS Workstation version 2.1, 2.2, 2.3, 2.4)
- Do not configure authentication on initial installation- this is configured by the Migration Tool.
Preparing for Migration

- When using domain authentication, the target machine must be in the same single domain as the source machine.
This chapter contains procedures for migrating data from OpenLab CDS ChemStation Edition or ChemStation B to OpenLab CDS Workstation using the Migration Tools for OpenLab. The Migration Tools export raw and results data, shared services information, instrument configuration, and user roles.

For information on how to migrate data from OpenLab CDS EZChrom Edition, see Chapter 4, “Migrating Data from OpenLab CDS EZChrom Edition,” starting on page 53.
Using the Migration Tools for OpenLab to Export Data from OpenLab CDS ChemStation Edition

Use the following procedure to export data from your OpenLab CDS ChemStation Edition to an export location (USB drive or network location). If you are using ChemStation B, see “Using the Migration Tools for OpenLab to Export Data from ChemStation B” on page 32.

1. On your OpenLab ChemStation Edition machine, insert the OpenLab CDS Workstation version 2.x USB media, right-click the setup.exe file, and run it as administrator. This starts the OpenLab CDS Installer.

2. In the OpenLab Installer navigator, click Migration.

Figure 2. Migration Tools selection from the OpenLab CDS installer
3 Select **Migration Tools for OpenLab**. The Migration Tools for OpenLab opens.

4 On the left navigation pane, click **Export**. The OpenLab CDS ChemStation Export Utility button is displayed.

5 Click **OpenLab CDS ChemStation Export Utility** to launch the Export Utility.

6 If you see a pop-up security warning, click **Run** on the pop-up screen. The ChemStation Analysis window opens and automatically analyzes the version number of the ChemStation to ensure that it is C.01.05, C.0106, or C01.07. If a version other than C.01.05, C.0106, or C01.07 is detected, an error is displayed.
Figure 4. Export Utility - ChemStation Analysis
Once the version is verified, if authentication is required for OpenLab CDS ChemStation Edition, the OpenLab Control Panel login window appears. (See Figure 5.)

7 In the login pop-up window, log into OpenLab CDS ChemStation Edition by completing the following fields, then click **OK**.

- **Connect to** — Local Server is selected by default.
- **Login** — Type the username of the system administrative account for OpenLab CDS ChemStation Edition. This enables the tool to authenticate and retrieve data from OpenLab CDS ChemStation Edition.
- **Password** — Type the password for the system administrative account entered in the Login field.
• **Domain** — If using Windows Domain authentication, select the user's domain. (This does not appear if Windows Domain authentication is not being used for OpenLab CDS ChemStation Edition.)

8 On the ChemStation Analysis screen, click **Connect** to re-attempt connection, if needed. Otherwise, click **Next**.

![Figure 6. Export Utility - ChemStation Analysis](image)
The Users and Group Report screen appears (Figure 7.)

**For Windows Local Security**

If you are using Windows Local security on OpenLab CDS ChemStation Edition, the User and Group Report will have a different appearance because OpenLab CDS version 2.x does not support Windows Local security. (See Figure 8.)
Select the checkbox to automatically create all the OpenLab CDS ChemStation Edition Windows local users and groups as OpenLab CDS version 2.x Internal users and groups.

Clear the checkbox to enable you to manually recreate all the users and groups later from within OpenLab CDS version 2.x. (Make sure you have obtained all the user and group information from the OpenLab CDS ChemStation Edition Control Panel if you choose this option.)

9 Review the users and groups to export. If desired, click **Save As** to browse to a location and save the list as html file. (Note that the list is automatically saved when export is completed.)

10 Click **Next**.
The Role Report screen appears, which displays all the roles that the tool has detected, along with the mapped role for OpenLab CDS 2.x (Figure 9).

Figure 9. Export Utility - Role Report

11 Click Save As to save the roles information as an HTML page. Otherwise, click Next.
The Instrument Report screen displays the instruments that are connected to the OpenLab CDS ChemStation Edition, and are active, as shown in Figure 10.

Figure 10. Export Utility - Instrument Report

12 If desired, click Save As to save the Instrument Report as an HTML file. Otherwise, click Next.

The Data Location screen appears. All locations from which data will be migrated are displayed, and are selected by default.
13 To add an export location outside of the Chem32 folder, click **Add**, then browse to the location and select it to add the location to the table.

14 Click **Next**.
The Data and Configuration Export screen enables you to select the export destination (Figure 12). The tool determines and displays the amount of disk space used by the result and system configuration data.

15 The system analyzes the file size for the current system configuration data and result data, and displays this in a table. The following items are included in the export:

- **Security and Instrument Configuration** – This is the OpenLab shared services configuration data, such as the administrative information.
- **Selected Data** – The ChemStation Data is included in the export package.

16 The **Export Destination** field is the destination folder where the OpenLab CDS ChemStation Edition files will be exported. Click **Browse** and then click **Make**.
New Folder to create an empty folder in your export location, as shown Figure 13. The export destination folder selected must be empty.

The Start button is enabled once the Export Destination is ready.
17 Click **Start** to begin the export process. The status bar displays indicates the export is in process (**Figure 14**), and the File Status changes from “Exporting” to “Done” upon completion.

**Figure 14.** Export Utility - export in progress showing File Status
If you need to halt the export, click **Stop**. A pop-up message will ask you to confirm your decision. The export process continues while the message is showing.

- If you click **Yes**, the export process stops and all the files in the export destination are cleaned up.
- If you click **No**, the message disappears, and the export process continues.

When the export completes, the Stop button and the progress bar disappear, and you see the following message "The export has completed", as shown in **Figure 15**.
18 Click **Next** to get a confirmation of the success.

19 Click **Finish** to complete the export process. The migration tool exits.

At this point, you have successfully exported data from OpenLab CDS ChemStation Edition to your export device. You can now proceed to import your data to OpenLab CDS version 2. See "**Using the Migration Tools for OpenLab to Import Data**" on page 37.

The export files are located in the **AgilentExport** folder in the export location you selected, as shown in **Figure 16**.
Figure 16. Export folder created by Migration Tools export
Figure 17 displays the contents of the AgilentExport folder.

- ChemStationExport — zip package containing the ChemStation data.
- export_file_report — file details the export activities. Specifically, it lists all the files that are included in the OpenLab CDS ChemStation Edition export that are in the ChemStation Export zip package.
- OpenLabSharedServicesExport — zip package containing the OpenLab Shared Services data, such as security, authentication, roles, administration information, and instrument configuration.
- package.check — This file is read during import to make sure the export package has not been modified in any way.
- package.descriptor — XML file containing details of the mapping to the import.
- Role Report — HTML file with user role information.
- User and Group Report — HTML file with users and groups.

**NOTE**

Do not modify these files. They are used by the Import function of the Migration Tools for OpenLab.
NOTE

If you are using Windows local users (unsupported in OpenLab CDS 2), and intend to recreate the new users as OLSS internal users in OpenLab CDS version 2, make sure to obtain all the Users and Groups information from the OpenLab CDS ChemStation Edition Control Panel. The "User's and Group's Role Assignment Report" from Control Panel could be used as a reference.
Using the Migration Tools for OpenLab to Export Data from ChemStation B

ChemStation B uses a special version of the Migration Tool, which is located on the OpenLab CDS Workstation installation USB flash drive.

1. On the computer where your ChemStation B is installed, insert the OpenLab CDS version 2.x installation media USB drive, and migrate to the OpenLab CDS Migration Tools at \OpenLabCDS-2.x\setup\tools\migration\setup\chemstationBexport.exe.

2. Double-click chemstationBexport.exe to start the program.
3 Migrating Data from ChemStation Edition and ChemStation B

3 Next to Select ChemStation Data Folder, click Browse and then browse to and select the location (usually C:\Chem32) where your ChemStation B data is located.

4 Next to the Select Output Folder, click Browse. Browse to the destination folder where you want to export the ChemStation B files (an external USB hard drive, for example). Click Make New Folder to create an empty folder in your export location (Figure 19.)

5 Click OK.

6 Once the ChemStation B data folder and output folder are selected, click Run to start the export.

The progress of the export is indicated in the progress bar shown in Figure 20.
When the export is completed, a message appears. Click **OK**.
The export of your ChemStation B data is now complete, and is located in an AgilentExport folder in the export location you designated.
3 Migrating Data from ChemStation Edition and ChemStation B

- ChemStationExport — zip package containing the ChemStation data.
- export_file_report — file details the export activities. Specifically, it lists all the files that are included in the ChemStation Export zip package.
- package.descriptor – XML file containing details of the mapping to the import.

**NOTE**

Do not modify these files. They are used by the Import function of the Migration Tools for OpenLab.

You can now proceed to import the files to OpenLab CDS version 2, using the steps described in "Using the Migration Tool for OpenLab to Import Data" on page 40.
Using the Migration Tools for OpenLab to Import Data

Once you have used the Migration Tools to export your data from the OpenLab CDS ChemStation Edition or ChemStation B, you will use the Migration Tools to import the data into your OpenLab CDS Workstation version 2.x. Importing the exported data is normally done as part of the installation of the OpenLab CDS 2 software.

**NOTE**
If migration is being performed in-place (on a single computer), you must uninstall OpenLab CDS ChemStation Edition and make sure the computer meets all the requirements before you install OpenLab CDS Workstation version and import using the Migration Tools.

**NOTE**
If the export package was created with OpenLab CDS ChemStation Edition, the extracted files that were loaded into projects in OpenLab CDS are removed from the staging location at the end of the import process. If the export package was created with ChemStation B, the extracted files in the staging location will remain. Always create a backup of the files to be migrated before starting the import process.
Run Migration Tools to import data as part of the OpenLab CDS installation

1. On the OpenLab CDS Workstation computer, insert the OpenLab CDS Workstation version 2.x USB drive, right-click the setup.exe file, and run it as administrator.

2. From the drop-down menu, select OpenLab CDS and then click OK. This starts the OpenLab CDS Installer. This opens the Installer Navigator - it does not actually begin the installation.

3. Install OpenLab CDS Workstation according to the directions in the OpenLab CDS Workstation User Guide.
   a. Do not select 'Secure 'Projects Root Path'.
   b. Set Authentication to "none.".
   c. Do not configure the system at this point.

NOTE

If you have already installed OpenLab CDS, you can run the Migration Tools from the OpenLab CDS Installer menu, provided it has not yet been configured (or Authentication set to "None"). Use the instructions in "Running the Migration Tools from the OpenLab Installer" on page 46.
3 Migrating Data from ChemStation Edition and ChemStation B

4 When the installer presents the Migration Settings, select the **Migrate Database** box. Fields appear for Export Packaging Location and Staging Location (Figure 23.)

![Figure 23. Migration Settings](image)

5 Next to the Export Package Location, click ![folder_icon] and then browse to and select the folder where the AgilentExport package is located. (This is the folder containing the exported files created when you ran the Migration Tools to export your data.) (See Figure 16 on page 29.)

6 Click **Validate** to verify the location and validate that it contains the export package.

7 Next to the Staging Location, click ![folder_icon]. Browse to a location on your local drive and select a folder. Or, create a folder to use as a staging location for the import data (Figure 24).
NOTE

The Staging Location folder must be empty.

Figure 24. Create a folder for your Staging Location

8 If the installer determines that a password is necessary, the Password field will appear. For Internal authentication, type a password to be assigned to each imported user. (Figure 25) Users will be required to change this password the first time they log into OpenLab CDS. For Windows Domain authentication, type the password for the Administrative user from the ChemStation system.
9 Click **Next** to continue and complete the installation. At the end of the installation procedure, successful importation of the data will be indicated as shown in **Figure 26**.
3  Migrating Data from ChemStation Edition and ChemStation B

Figure 26. Successful installation and importation of migrated data

10 Click Next. The Installation Completed window appears (Figure 27.)
Click Finish to finish the installation and reboot the computer, or click Run Software Verification to run the software verification tool.

At this point, you should log into OpenLab CDS, where you will be prompted to change your password. Check that the data were imported correctly using the procedures described in Chapter 5, “Post-Migration Data Verification,” starting on page 91.
Using Migration Tools to import data after installation of OpenLab CDS

In situations where the Migration Tools are not executed successfully during installation of OpenLab CDS, use this procedure to run the Migration Tools from the OpenLab CDS installation media USB drive.

1. On the computer where your OpenLab CDS is installed, insert the OpenLab CDS version 2.x installation media USB drive, and migrate to the OpenLab CDS Migration Tools at OpenLabCDS-2.x\Setup\Tools\Migration.

2. Select Migration Tools for OpenLab. The Migration Tools for OpenLab opens with the Planning tab displayed.

3. When the tool is running, click **import** on the left side navigation pane.

![Migration Tools Import tab](image-url)
4 Click **OpenLab CDS Import Utility** to launch the Import Utility, which enables you to set up and import the OpenLab CDS ChemStation Edition data to the OpenLab CDS machine.

![OpenLab CDS Import Utility](image)

**Figure 29.** OpenLab CDS Data and Configuration Import
5 On the OpenLab CDS Data and Configuration Import screen, click **Browse** and navigate to the **AgilentExport** folder that was created on your export device after the export (see **Figure 13** on page 25). Select the whole folder, and click OK.

![Image of OpenLab CDS Import Utility](image.png)

**Figure 30.** AgilentExport folder

6 Once you have selected the AgilentExport Package, next to the Staging Location, click **Browse**.

7 Browse to a location on your local drive and create a folder to use as a staging location for the import data.

8 Click **OK**.
The Staging Location you created is filled in the Staging Location field.
If you are using authentication, you are required to set a default password. Type the default password in the **Default Password** field. This password is enabled for all imported users. After logging on, each imported user is required to enter a new password.

NOTE

When Importing from ChemStation B or from OpenLab CDS ChemStation Edition without authentication, the Default Password field is unavailable.

When you correctly complete all fields, the **Start** button is enabled.

10 Click **Start** to begin the import process.
A status bar shows the import is in progress.

**Figure 33.** OpenLab CDS Data and Configuration Import progress
What happens when data are imported

For OpenLab CDS ChemStation Edition

During the import process, the migration tool performs the tasks in the background in the following order:

a  Automatically creates a default project group in the local OpenLab CDS Workstation installation called ChemStation Data Archive_TimeStamp, with subprojects for each instrument.

b  Extracts the data from the export package to the staging location.

c  Imports the data so that OpenLab CDS Data Analysis can read them (Figure 34).
d  Creates users and groups in OpenLab CDS to match those that existed in the OpenLab CDS ChemStation Edition installation.

e  Creates roles in OpenLab CDS based on the configuration in the OpenLab CDS ChemStation installation.

f  Recreates any active instruments from OpenLab CDS ChemStation Edition.
For ChemStation B

For data exported from ChemStation B, the Migration Tool extracts the data from the export package to the staging location only.

When the import completes, a confirmation message appears “The import has completed”, and the Finish button is enabled.

11 Click Finish to complete the import process. The migration tool exits. If the export package was created with OpenLab CDS ChemStation Edition, the extracted files located in the staging location are removed. If the export package was created with ChemStation B, the extracted files in the staging location will remain.
4 Migrating Data from OpenLab CDS EZChrom Edition

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This chapter contains procedures for migrating data from OpenLab CDS EZChrom Edition Workstation to OpenLab CDS Workstation using the Migration Tools for OpenLab. The Migration Tools export raw and results data, shared services information, project information, instrument information, users/groups, and roles/privileges.
Using the Migration Tools for OpenLab to Export Data from OpenLab CDS EZChrom Edition

Use the following procedure to export data from your OpenLab CDS EZChrom Edition to an export location (USB drive or network location).

1. Insert the OpenLab CDS Workstation version 2.x USB media, right-click the setup.exe file, and run it as administrator. This starts the OpenLab CDS Installer.

2. In the OpenLab Installer navigator, click Migration.

Figure 36. Migration tool selection from the OpenLab CDS installer
3 Select **OpenLab Migration**. The Migration Tool opens.
4 On the left navigation pane, click **Export**. The OpenLab CDS EZChrom Export Utility button is displayed.

5 Click **OpenLab CDS EZChrom Export Utility** to launch the Export Utility.
6 If you see a pop-up Security Warning, click **Run** on the pop-up screen.

The EZChrom Analysis window opens and automatically analyzes the version number of the OpenLab CDS EZChrom Edition to ensure that it is a supported version. If a non-supported version is detected, an error is displayed.
Figure 38. Export Utility - EZChrom Analysis
Once the version is verified, if authentication is required for OpenLab CDS EZChrom Edition, the OpenLab Control Panel login window appears. (See Figure 39.)

7 In the login pop-up window, log into OpenLab CDS EZChrom Edition by completing the following fields, then click **OK**.
   - **Connect to** — Local Server is selected by default.
   - **Login** — Type the username of the system administrative account for OpenLab CDS EZChrom Edition. This enables the tool to authenticate and retrieve data from OpenLab CDS EZChrom Edition.
   - **Password** — Type the password for the system administrative account entered in the Login field.
• **Domain** — If using Windows Domain authentication, select the user’s domain. (This does not appear if Windows Domain authentication is not being used for OpenLab CDS EZChrom Edition.)

8 On the **EZChrom Analysis** screen, click **Connect** to re-attempt connection, if needed. Otherwise, click **Next**.

![Figure 40. Export Utility - EZChrom Analysis](image-url)
The User and Group Report screen appears (Figure 41.)

For Windows Local Security

If you are using Windows Local security on OpenLab CDS EZChrom Edition, the User and Group Report will have a different appearance because OpenLab CDS version 2.x does not support Windows Local security. (See Figure 42.)
Select the checkbox to automatically recreate all the OpenLab CDS EZChrom Edition Windows local users and groups as OpenLab CDS version 2.x Internal users and groups.

Clear the checkbox to enable you to manually recreate all the users and groups later from within OpenLab CDS version 2. (Make sure you have obtained all the user and group information from the OpenLab CDS EZChrom Edition Control Panel if you choose this option.)

Review the users and groups to export. If desired, click **Save As** to browse to a location and save the list as html file. (Note that the list is automatically saved when export is completed.)

Click **Next**.
The Role Report screen appears, which displays all the roles the tool has detected, along with the mapped roles for OpenLab CDS 2 (Figure 43).

Figure 43. Export Utility - Role Report

Click Save As to save the roles information as an HTML page. Otherwise, click Next.
The Project Report screen appears, which displays the existing Projects and locations.

![Image: Export Utility - Project Report]

12 Click **Save As** to browse to a location and save the project information as an HTML page. (The project report is also saved into the export package by default.) Otherwise, click **Next**.
The Instrument Report screen displays the instruments that are connected to the OpenLab CDS EZChrom Edition, and are active, as shown in Figure 45.

13 If desired, click **Save As** to save the Instrument Report as an HTML file. Otherwise, click **Next**.
Migrating Data from OpenLab CDS EZChrom Edition

The OpenLab CDS Data and Configuration Export screen enables you to select the data export location (Figure 46). The tool determines and displays the amount of disk space used by the result and system configuration data, and displays it in a table:

- **Security and Instrument Configuration** – This is the OpenLab shared services configuration data, such as the administrative information.
- **EZChrom Data** – By default, all the OpenLab CDS EZChrom Edition data is migrated.

The **Export Destination** field is the destination folder where the OpenLab CDS EZChrom Edition files are exported. Click **Browse** and then click **Make New Folder** to create an empty folder in your export location, as shown Figure 47.
NOTE

The export destination folder selected must be empty.

Figure 47. Export Utility - creating an export folder

The Start button is enabled when the Export Destination is ready.
15 Click **Start** to begin the export process. The status bar indicates the export is in process (**Figure 48**), and the File Status changes from "In Progress" to "Done" when completed.

**Figure 48.** Export Utility - export in progress showing File Status
If you need to halt the export, click **Stop**. A pop-up message asks you to confirm your decision. The export process continues while the message is showing.

- If you click **Yes**, the export process stops and all the files in the export destination are cleaned up.
- If you click **No**, the message disappears, and the export process continues.

When the export completes, the Stop button and the progress bar disappear, and you see the following message “The export has completed”, as shown in **Figure 49**.
16 Click **Next** to get a confirmation of the success.

17 Click **Finish** to complete the export process. The migration tool exits.

At this point, you have successfully exported data from OpenLab CDS EZChrom Edition to your export device. Proceed to Import your data to OpenLab CDS version 2. See “Using the Migration Tools for OpenLab to Import Data” on page 72.

The export files are located in the **AgilentExport** folder in the export location you selected, as shown in **Figure 50**.
Figure 50. Export folder created by Migration Tool export
Figure 51 displays the contents of the AgilentExport folder.

- **EZChromDataExport** — zip package containing the EZChrom data.
- **export_file_report** — text file details the export activities. Specifically, it lists all the files that are included in the OpenLab CDS EZChrom Edition export that are in the EZChrom Export zip package.
- **Instrument Report** — HTML file with instrument information
- **OpenLabSharedServicesExport** — zip package containing the OpenLab Shared Services data, such as security, authentication, roles, administration information, and instrument configuration
- **package.descriptor** — XML file containing details of the mapping to the import
- **Project Report** — HTML file with project information
- **Role Report** — HTML file with user role information
- **User and Group Report** — HTML file with users and groups
NOTE

Do not modify these files. They are used by the Import function of the Migration Tools for OpenLab.

NOTE

If you are using Windows local users (unsupported in OpenLab CDS 2), and intend to recreate the new users as OLSS internal users in OpenLab CDS version 2, make sure to obtain all the Users and Groups information from the OpenLab CDS EZChrom Edition Control Panel. The "User’s and Group’s Role Assignment Report" from Control Panel could be used as a reference.
Using the Migration Tools for OpenLab to Import Data

Once you have used the Migration Tools to export your data from the OpenLab CDS EZChrom Edition, you will use the Migration Tools to import the data into your OpenLab CDS Workstation version 2.x. Importing the exported data is normally done as part of the installation of the OpenLab CDS 2 software.

Refer to Chapter 2, “Preparing for Migration” for additional information about requirements.

If migration is being performed in-place (on a single computer), you must uninstall OpenLab CDS EZChrom Edition and make sure the computer meets all the requirements before you install OpenLab CDS Workstation version and import using the Migration Tools.

If the export package was created with OpenLab CDS EZChrom Edition, the extracted files that were loaded into projects in OpenLab CDS are removed from the staging location at the end of the import process. If the export package was created with EZChrom B, the extracted files in the staging location will remain. Always create a backup of the files to be migrated before starting the import process.

Running Migration Tools to import data as part of the OpenLab CDS installation

1. On the OpenLab CDS Workstation computer, insert the OpenLab CDS Workstation version 2.x USB drive, right-click the setup.exe file, and run it as administrator.
2. From the drop-down menu, select OpenLab CDS and then click OK. This starts the OpenLab CDS Installer.
3 Install OpenLab CDS Workstation according to the directions in the OpenLab CDS Workstation User Guide.
   a. Do not select ‘Secure ’Projects Root Path’.
   b. Set Authentication to “none.”
   c. Do not configure the system at this point.

NOTE

If you have already installed OpenLab CDS, you can run the Migration Tools from the OpenLab CDS Installer menu, provided it has not yet been configured (or Authentication set to “None”). Use the instructions in “Running the Migration Tools from the OpenLab Installer” on page 79.
When the installer presents the Migration Settings, select the **Migrate Database** box. Fields appear for Export Packaging Location and Staging Location (**Figure 53**.)

Next to the Export Package Location, click ... and then browse to and select the folder where the AgilentExport package is located. (This is the folder containing the exported files created when you ran the Migration Tools to export your data.) (See **Figure 50** on page 69.)
6 Click **Validate** to verify the location and validate that it contains the export package.

7 Next to the Staging Location, click ![Folder Icon]. Browse to a location on your local drive and select a folder. Or, create a folder to use as a staging location for the import data (Figure 54).

**NOTE**
The Staging Location folder must be empty.

---

**Figure 54.** Create a folder for your Staging Location

8 If the installer determines that a password is necessary, the Default Password field will appear. For Internal authorization, type a password to be assigned to each imported user. (Figure 55) Users will be required to change this password.
password the first time they log into OpenLab CDS. For Windows Domain authentication, type the password for the Administrative user from the OpenLab CDS EZChrom Edition system.

9 Click Next to continue and complete the installation. At the end of the installation procedure, successful importation of the data will be indicated as shown in Figure 56.
10 Click Next. The Installation Completed window appears (Figure 57.)
11 Click **Finish** to finish the installation and reboot the computer, or click **Run Software Verification** to run the software verification tool.

At this point, you should log into OpenLab CDS, where you will be prompted to change your password. Check that the data were imported correctly using the procedures described in Chapter 5, "Post-Migration Data Verification," starting on page 91.
Running the Migration Tools from the OpenLab Installer

In situations where the Migration Tools are not executed successfully during installation of OpenLab CDS, use this procedure to run the Migration Tools from the OpenLab CDS installation media USB drive.

1. On the computer where your OpenLab CDS is installed, insert the OpenLab CDS version 2.x installation media USB drive, and migrate to the OpenLab CDS Migration Tools at OpenLabCDS-2.x\Setup\Tools\Migration.

2. Select Migration Tools for OpenLab. The Migration Tools for OpenLab opens with the Planning tab displayed.

3. When the tool is running, click Import on the left side navigation pane.

5 When the tool is running, click **Import** on the left side navigation pane.

6 Click **OpenLab CDS Import Utility** to launch the Import Utility, which enables you to set up and import the OpenLab CDS EZchrom Edition data to the OpenLab CDS machine.
Figure 60. OpenLab CDS Data and Configuration Import
On the OpenLab CDS Data and Configuration Import screen, click **Browse** and navigate to the **AgilentExport** folder that was created on your export device after the export (see **Figure 13** on page 25). Select the whole folder, and click OK.

Once you have selected the AgilentExport Package, next to the Staging Location, click **Browse**.

Browse to a location on your local drive and create a folder which to use as a staging location for the import data.

Click **OK**.
The Staging Location you created is filled in the Staging Location field.
11 If you are using authentication, you are required to set a default password. Type the default password in the Default Password field. This password is enabled for all imported users. After logging on, each imported user is required to enter a new password.

When Importing from OpenLab CDS EZChrom Edition without authentication, the Default Password field is unavailable.

When you correctly complete all fields, the Start button is enabled.

12 Click Start to begin the import process.
A status bar shows the import is in progress.

Figure 64. OpenLab CDS Data and Configuration Import progress
13 Click **Finish** to complete the import process. The migration tool exits and the extracted files located in the staging location are removed.

You have successfully migrated your data to OpenLab CDS version 2.x.
What happens when data are imported

During the import process, the migration tool performs the tasks in the background in the following order:

a. Automatically creates a default project group in the local OpenLab CDS Workstation installation called EZChrom Data Archive_TimeStamp, with subprojects for each EZChrom project.

b. Extracts the data from the export package to the staging location.

c. Imports the data so that OpenLab CDS Data Analysis can read them (Figure 66).
d  Creates projects in OpenLab CDS to match those from the OpenLab CDS EZChrom Edition installation.

e  Creates users and groups in OpenLab CDS to match those from the OpenLab CDS EZChrom Edition installation.

f  Creates roles in OpenLab CDS based on the configuration in the OpenLab CDS EZChrom installation.
g Recreates any active instruments from OpenLab CDS EZChrom Edition.

**NOTE**
Migration of the associations between instrument to different users with different projects is not supported and must be manually configured in OpenLab CDS 2.x. (In OpenLab CDS EZChrom, the setting for "Always use default project with this instrument" is unchecked.)
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5 Post-Migration Data Verification

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Verifying Projects 97
Verifying Users, Groups, and Roles 103

This chapter contains procedures for verifying the data and instrument information were migrated successfully.

NOTE

The Migration Tool exports ChemStation B data and extracts it to the staging location only. No instruments, projects, or users/groups/roles are created on the OpenLab CDS Workstation version 2.x.

NOTE

The screenshots and the corresponding information in this chapter contain sample data and will differ from what you see in your OpenLab CDS Control Panel.
Getting Started

Start the OpenLab CDS Control Panel.

Log in by completing the following fields, and then click **OK**.

- **Connect to** - Set to (local) Local Server by default.
- **Login** - Use any of your OpenLab CDS account usernames.
- **Password** - Use the default password you set during the import (see page 46.)
- **Domain** - If using Windows Domain security, this field appears. Select your domain.
During the migration, passwords are reset, as they cannot be imported. You can reset the default password using the Administration tab in the Project View of the Control Panel.

If this is the first time you logged in after performing import, you must reset your password. Type the default password set during import, then type a new password and then type it again to confirm. Then click OK.
Verifying Instruments

Perform the following steps to verify the instruments were imported successfully.

1. In the OpenLab CDS Control Panel, click **Instruments** at the bottom of the navigation pane.
2. Expand the instruments menu and click on the Instrument group. (Figure 69).
To configure an instrument, select it and click **Configure Instrument** on the ribbon bar. The Configuration screen appears (Figure 70).
You are ready to configure the selected instrument. Be sure to configure all the instruments that appear in the Instruments group.

For complete information on configuring instruments, refer to the OpenLab CDS online help.
Verifying Projects

Perform the following steps to ensure that the Projects were created successfully.

**For OpenLab CDS ChemStation projects**

1. In the OpenLab CDS Control Panel, click **Projects** on the bottom left in the navigation pane.

2. Expand the project groups to view the list of projects. You will see projects named for each imported instrument. If there is a deleted instrument, the

![Figure 71. Control Panel Projects for migrated from OpenLab CDS ChemStation Edition](image)
Post-Migration Data Verification

project corresponding to that instrument appears as instrumentname_000 in the project list.

3 Click a project to select it.

4 Click **Start Data Analysis** on the top command bar.

The Data Analysis application launches (**Figure 72**).

![Figure 72. OpenLab CDS Data Analysis](image)

5 In the navigation pane on the left, select the result and click **Load Data** on the command bar to view the data (**Figure 73**). To view single run results, click on the project group.
Figure 73. Imported data displayed in Data Analysis
Post-Migration Data Verification

For OpenLab CDS EZChrom projects

1. In the OpenLab CDS Control Panel, click Projects on the bottom left in the navigation pane.

   NOTE
   Migration of the associations between instrument to different users with different projects is not supported and must be manually configured in OpenLab CDS 2.x. (In OpenLab CDS EZChrom, the setting for ‘Always use default project with this instrument’ is unchecked.)

2. Expand the project groups to view the list of projects.

3. Click a project to select it.

Figure 74. Control Panel projects for migrated from OpenLab CDS EZChrom Edition
5 Post-Migration Data Verification

4 Click **Start Data Analysis** on the top command bar.

The Data Analysis application launches.

5 In the navigation pane on the left, select the result and click **Load Data** on the command bar to view the data (**Figure 76**). To view single run results, click on the project group.
Figure 76. Imported data displayed in Data Analysis
Verifying Users, Groups, and Roles

Perform the following steps to ensure that Users, Groups, and Roles were imported successfully.

1. In the OpenLab CDS Control Panel, click **Administration** on the bottom left navigation pane. You will see selections for **Users**, **Groups**, and **Roles** listed in the Administration navigator.

2. Click **Users** and **Groups** in the navigation pane as desired to review the imported information (**Figure 77**).

---

**Figure 77.** OpenLab CDS Groups
3  Ensure that the users, groups, and custom roles that you created were migrated successfully (Figure 78).

![OpenLab CDS Roles](image)

You have completed the verification steps to ensure that the data were migrated successfully.

To complete the migration, complete the migration of your methods. For information on how to migrate methods, see the Migration Guide that is appropriate for the product you are migrating.

Sequences created in OpenLab CDS ChemStation Edition or OpenLab CDS EZChrom Edition cannot be used directly in OpenLab CDS 2.x. They must be recreated in OpenLab CDS 2.x.
This chapter provides information about some common errors that you may encounter while migrating data from OpenLab CDS ChemStation Edition or OpenLab CDS EZChrom Edition to OpenLab CDS 2 using the Migration Tools for OpenLab.

Figures displayed are for OpenLab CDS ChemStation Edition. However, errors described apply to using the Migration Tools for OpenLab with either OpenLab CDS ChemStation Edition or OpenLab CDS EZChrom Edition.

### Migration Tools for OpenLab Issues
- Migration Tools for OpenLab cannot launch due to .NET incompatibility
- Migration Tools for OpenLab Planning page documentation cannot open

### Export Issues
- Export destination must be empty
- No active instruments detected
- Could not find a part of the path
- Access to the path is denied
- Access to export destination path is denied

### Import Issues
- A supported version of OpenLab CDS was not found
- User authentication incorrectly set up
- Export package descriptor file not found
Migration Tools for OpenLab Issues

This section contains issues related to the Migration Tools for OpenLab.

Migration Tools for OpenLab cannot launch due to .NET incompatibility

Cause  This error may appear on older Windows 7 32-bit machines.

Solution  Migration Tools for OpenLab requires that .NET 4.5 is installed. Refer to the documentation links on the Planning page of the Migration Tools for OpenLab for additional information.

Migration Tools for OpenLab Planning page documentation cannot open

Cause  This error occurs when you cannot open a PDF from the Planning page of the Migration Tools for OpenLab.

Solution  To open the links on the Planning page of the Migration Tools for OpenLab, a PDF reader must be installed. Click on the Adobe Acrobat link on the Planning page to install the PDF reader. The OpenLab CDS ChemStation Edition and OpenLab CDS 2 install packages also have links to PDF reader software.
Export Issues

This section contains issues related to the export process.

Export destination must be empty

**Cause**  This error occurs when the Export package is placed in a folder that is not empty.

**Solution**  The Export package must be placed into an empty folder. You are given the option to make a new empty folder within the browser dialog.

No active instruments detected

**Cause**  This error occurs when no active instruments are detected.

**Solution**  If the OpenLab CDS ChemStation Edition or OpenLab CDS EZChrom Edition does not have any active instruments, you can continue with the export. Data from deleted or inactive instruments are carried over, but no new instruments are created after import. If there are active instruments to carry over, log into OpenLab CDS ChemStation Edition or OpenLab CDS EZChrom Edition and ensure that the instruments are configured correctly.

Could not find a part of the path

**Cause**  This error occurs when the system cannot find the specified folder.

**Solution**  Ensure that the path entered is correct.
Access to the path is denied

**Cause**  This error occurs when you do not have access to the target folder (for OpenLab CDS ChemStation Edition, this is C: \ Chem32).

**Solution**  Ensure that you have the appropriate Windows permissions to access the target folder. A Windows user with administrative privileges should run the Migration Tools for OpenLab.

Access to export destination path is denied

**Cause**  This error occurs when you attempt to set the Export Destination path to a folder that you do not have access to.

**Solution**  Place the Export package in a location that is accessible. A Windows user with administrative privileges should run the Migration Tools for OpenLab.
Import Issues

This section contains issues related to the import process.

A supported version of OpenLab CDS was not found

**Cause**  This error occurs when the Migration Tools for OpenLab cannot find an OpenLab CDS installation.

**Solution**  This might happen if no OpenLab CDS installation is present, or if an unsupported version of OpenLab CDS is installed.

User authentication incorrectly set up

**Cause**  This error occurs if you have incorrectly set up your OpenLab CDS workstation installation with internal authentication.

**Solution**  You must have an OpenLab CDS workstation installation set up with no authentication.

Export package descriptor file not found

**Cause**  This error occurs when the Import Utility cannot find the package.descriptor file.

**Solution**  This is most likely because an invalid folder has been selected. The folder named AgilentExport, which is created by the Export Utility, must be selected.
In This Book

This guide provides step-by-step instructions for migrating data, instrument information, and user information, from OpenLab CDS ChemStation Edition, ChemStation, and OpenLab CDS EZChrom Edition to OpenLab CDS Workstation version 2.4 using the Migration Tools for OpenLab (Migration Tools).