Thank you for purchasing a software from Agilent Technologies. CrossLab Start Up is focused on helping customers shorten the time it takes to start realizing the full value of their system investment. Installation, Introduction and First Run Assist 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".
Important Customer Web Links

- 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.

- 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? 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.
- Ask the customer to sign the Service Completion section including the customer’s and Service Engineer signature. Attach the signature page when closing out the Service Order.

Additional Instruction Notes

- For detailed installation procedures, refer to CDS_configure-with-ECM.pdf under Setup\Docs\EN on the installation media.
Software Installation

System Information

☐ Locate appropriate license authorization codes and/or license certificates and verify against sales order.
☐ Record all the software product numbers, revision numbers, and license numbers.

<table>
<thead>
<tr>
<th>Software / Product Numbers</th>
<th>Revision</th>
<th>License Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Preparation

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

<table>
<thead>
<tr>
<th>Product or Part Description</th>
<th>Observation</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

☐ Discuss any specific questions or issues with the customer before starting.
☐ Discuss any configuration options with the customer before starting.
☐ Check for Hotfix, Microsoft updates, and patch compatibility appropriate for the customer’s system. **Critical Note: Current Microsoft updates and Windows version must be installed in the customer provided PC before installation can begin.**
- Check for required service note applicability and firmware updates if connecting to instruments.
- Locate appropriate license authorization codes and/or license certificates and verify against sales order.
- **Upgrades only** – Ensure with the customer that instrument control settings, data, methods etc. have been properly saved or archived before starting any installation procedures.
- **Upgrades only** – Ensure that the Root Certificates are not turned off as this can prevent to update OpenLab CDS 2.x.
- Review the Release Note
- Explain that registration packet and license number must be stored in a secure place.
- Acquire administrator privileges for all server and client computers. Power user privileges are not enough (the installation will not start).

<table>
<thead>
<tr>
<th>Installation User</th>
</tr>
</thead>
</table>

- Get the ECM Server Hostname, ECM Version and Account Information (ECM Credentials) for the connection of the OLSS component.

<table>
<thead>
<tr>
<th>ECM Server Host Name</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>ECM Version</td>
<td></td>
</tr>
<tr>
<td>ECM Account</td>
<td></td>
</tr>
<tr>
<td>ECM User for Connection (Domain or Built-in), needs administrative rights in ECM 3.x</td>
<td></td>
</tr>
</tbody>
</table>

- Obtain the Database server information for an **SQL Server** Database

<table>
<thead>
<tr>
<th>Database Server Hostname</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Port</td>
<td></td>
</tr>
<tr>
<td>Instance Name</td>
<td></td>
</tr>
<tr>
<td>Super User</td>
<td></td>
</tr>
<tr>
<td>Shared Services Database</td>
<td></td>
</tr>
<tr>
<td>Shared Services Database User</td>
<td></td>
</tr>
</tbody>
</table>
☐ Obtain the Database server information for an **Oracle** Database

<table>
<thead>
<tr>
<th>Database Server Hostname</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Port</td>
<td></td>
</tr>
<tr>
<td>SID or Service name</td>
<td></td>
</tr>
<tr>
<td>Superuser</td>
<td></td>
</tr>
<tr>
<td>Shared Services Database Schema Username</td>
<td></td>
</tr>
<tr>
<td>Tablespace Path</td>
<td></td>
</tr>
</tbody>
</table>

☐ Obtain the Database Server information for a **PostgreSQL** Database

<table>
<thead>
<tr>
<th>Server Name</th>
<th>localhost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Port</td>
<td></td>
</tr>
<tr>
<td>PostgreSQL Installation Path</td>
<td></td>
</tr>
<tr>
<td>PostgreSQL Database location</td>
<td></td>
</tr>
<tr>
<td>Super User</td>
<td></td>
</tr>
<tr>
<td>Shared Services Database Name</td>
<td></td>
</tr>
<tr>
<td>Shared Services Database User</td>
<td></td>
</tr>
</tbody>
</table>

☐ Run the OpenLab CDS Installer and review the PDFs in the Installer Planning and Resources menus before you install the software.

☐ Confirm that hardware and software will support the system.

☐ Review release notes for the current release of OpenLab Content Management.

☐ Explain that the Registration Packet and license number must be stored in a secure place.

☐ Show the customer the **Setup\Tools\Support** directory located on the installation media.

☐ 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

Install OpenLab Shared Services Server Software

Note: There are many upgrade/installation scenarios possible. Use the "Configuring OpenLab CDS with ECM Guide" to complete the installation.

☐ Review the Before You Begin chapter of the Configuring OpenLab CDS with ECM Guide to prepare for the installation.

☐ Log into Windows as a Domain user who is a local administrator.

☐ Run setup.exe as administrator. On the OpenLab Installer start screen, select OpenLab Shared Services Server.

☐ On the Planning tab, click System Preparation Tool.

☐ Select the product configuration, OpenLab CDS~2.6~ServerWithECM3x~Win2016/Win2019 from the drop-down list and click Continue.

☐ After SPT completes the check, unselect recommended settings that do not need to be applied to the system which are listed after the mandatory settings.

☐ Click Apply Fixes.

☐ Click Next and review the Actions Required section in the System Preparation Report. The report can be printed is saved in: <local_drive>/Users/<logged_on_user>/AppData/Local/Agilent/LogFiles/SystemPreparationTool/<YYYYMMDDhhmmss>/SystemPreparationReport.html

Note: User must manually configure the mandatory and recommended items listed in the Actions Required section of the report.

☐ Click Finish and click Yes in the Reboot required dialog to restart the system to complete the configuration.

☐ In the Shared Services Installation section, run Steps 1 to 3 following the CDS_configure-with-ECM guide instructions.

☐ During an Upgrade from OpenLab Shared Services 3.4 to OpenLab Shared Services 3.5 reset the Password (apply a new PW) for the Data Repository Account in Step 3, for other upgrades or new Installation apply a Password

☐ Run Step 4.

☐ In the ECM Credentials screen apply the ECM Credentials noted in the Preparation Section of this Document

☐ In the Certificate Setup

☐ Use Agilent OpenLab’s internal certificate
☐ In case the Customer wants to use an existing custom certificate, select the appropriate Information

☐ Complete the remaining screens of **Step 4**.

**Configure Control Panel for OpenLab ECM 3.x**

During the installation, the OpenLab ECM 3.x server is automatically connected to the Control Panel. Login to the Control Panel.

☐ Configure the Shared Services Server following the **CDS_configure-with-ECM** guide instructions to create users, assign roles.

☐ Inform the customer on the importance of having a second administrative account.

☐ Obtain and Install the license.

**Software Verification**

☐ Run the Software Verification Tool and verify the report passes.

☐ Verify the Installation by accessing Content Management via IE.
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 the Signature Page with both Agilent and Customer signatures.
☐ Attach Signature Page when closing the 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.

Installation 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: __________________________