Agilent OpenLab CDS ChemStation Edition C.01.10

Installation Checklist - Standalone Workstation

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 to Workstation Installation Guide - CDS_CS_Install-WS.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. M8308-64000 Openlab Chemstation	C.01.10 Update 6	D5945FFE5A
2. G5350AA	3.1X	TWC63-222QZ-JL8KT-WN2A7
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

Bundled Computer Hardware Information

☑ *Section not applicable*

List the PC name, network components and/or peripherals	Model Number	Serial Number
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

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Preparation

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

Product or part description	Observation	Action
N/A	N/A	N/A

☑ 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.

☑ For systems not connected to the internet, follow the instructions on CDS_CS_Install-WS.pdf, section "Improve performance on Offline Machines" in Chapter "Optional Procedures".

☑ Explain that the registration packet, the SubscribeNet login information (users and passwords), and the authorization code must be stored in a secure place.

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Installation Procedure

Bundled PC Installation Tasks

☑ *Section not applicable*

☐ For a Standalone Workstation installation follow the instruction on *CDS_CS_setup_PC-Bundle.pdf*.

Non-Bundled PC Installation Tasks

☐ *Section not applicable*

☑ Follow Chapter 1 *Prepare your PC* of *CDS_CS_Install-WS.pdf*.

    ☑ Install and update Windows completed.

    ☑ Install and configure Third Party Tools.

    ☑ Follow chapter before you Begin the installation of OpenLab CDS ChemStation Edition.

    ☑ Configure the Operating System according to the manual.

☑ Go to the next chapter *Install OpenLab CDS ChemStation Edition* and follow the instructions:

☑ Complete the *Post Installation Tasks*

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Data Transfer – from ChemStation B to ChemStation C Workstations

Data and method transfer are included for up to four hours using an external hard drive to transfer the data

- Unsupported is data and method transfer using the customer's network or IT infrastructure. Please ask the customer to opt-in to this added service.

- Reasonable, standard checks will be made to ensure that the data is transferred in entirely. These include checks on total transfer size and number of files. Individual file fidelity is not checked – if a file was corrupted on the old system, the file will be transferred to the new system as-is.

- This service does not provide any compliance services relating to data or method integrity. Data and methods are transferred but are not re-analyzed on the new system, nor are legacy methods validated on the new system. The familiarization checklist includes how to train the customer to re-analyze legacy data on the new system and to adapt legacy methods to the new system via OpenLab's built-in method resolution feature.

Data Transfer for Installations on a NEW PC

- Record the file path settings for Sequence, Data, and Method in the **Preferences** window for each instrument in the old ChemStation Rev. B System.

- Wipe the flash drive clean of any residual files, including hidden files and viruses, by re-formatting the drive.

- Copy and paste all the data acquired from the old ChemStation Rev. B System to a flash drive.

- Bring the flash drive to the new PC that has the ChemStation Rev. C installed. Create a new folder Chem32_old data from CS B locally. Paste all the files copied from the previous step into this folder.

- After paste is finished, to make sure the data transfer is completed, check the total size, total number of folders, and total number of files of the pasted folder by right-click on the folder Properties > General > Size and Contains.

- They must correspond to the original folder on ChemStation Rev. B System.

- Launch each instrument in the new system, and add the paths for Sequence, Data, and Method from the ChemStation Rev. B (folder Chem32_old data from CS B) to the new directory/machine by using the Preferences > Path > Add > function.

- After the directories are added, check on the ChemStation explorer on the left to make sure the added directories for Sequence, Data, and Method are showing.

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Data Transfer for Installations on the same PC

- Record the file path settings for Sequence, Data, and Method in the Preferences window for each instrument in the old ChemStation Rev. B System.

- During installation, create a new folder (default: C:\Users\Public\Public Documents\ChemStation) for new data to be stored at.

- Launch each instrument in the new system, and add the paths for Sequence, Data, and Method from the ChemStation Rev. B system to the new directory/machine by using the Preferences > Path > Add function.

- After the directories are added, check on the ChemStation explorer on the left to make sure the added directories for Sequence, Data, and Method are showing.

System Configuration

Follow the configuration guide *CDS_CS_Configure.pdf* to complete the installation.

1 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.

2 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.

3 Configure Security and Storage, if applicable

- ☑ Launch the OpenLab Control Panel and navigate to Administration

- ☑ Select System Configuration in the Navigation Window then click Edit System Configuration.

- ☑ Configure the Authentication Provider and Network Storage Location to desired settings.

4 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 also which administrative tasks can be carried out in the OpenLab Control Panel.

☑ For details, refer to Chapter User Management on Configuration Guide - CDS_CS_Configure.pdf.

5 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

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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 instruments.

☑ Explain how to use manuals, guides, and online help.

☑ Explain how to get self-help, and FAQs online.

☑ Explain how to log an instrument 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.
>
> N/A

Service Completion

Service request number 6005391850

Date service completed June 10, 2022

Agilent signature *Craig Jones*

Customer signature

Total number of pages in this document 9

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