Agilent OpenLAB Chromatography Data System

EZChrom Edition

EZChrom Elite and ICM Migration Guide

Agilent Technologies

Contents

Introduction

Who should read this guide?

This migration guide is designed to help EZChrom Elite and Instrument Control Management (ICM) users move existing enterprise settings and system configurations to a newly installed version of OpenLAB Chromatography Data System (CDS). This guide does not support a migration from ICM to OpenLAB CDS Chemstation Edition.

The Agilent OpenLAB CDS software

The Agilent OpenLAB CDS, along with OpenLAB Electronic Lab Notebook (ELN), and OpenLAB Enterprise Content Manager (ECM), make up the Agilent OpenLAB software suite. These three integrated solutions form a system designed to grow with customers' needs, from a small standalone analytical lab through a global network with hundreds of locations. Using the OpenLAB software, instruments from multiple vendors can connect to any size network—from individual workstations and workgroups to global enterprises. With full instrument control, centralized administration and ease-of-support, users can achieve lower operational costs and better instrument use. See your Agilent representative to learn how other products in the OpenLAB suite can help you.

EZChrom Elite Migration

What file settings are migrated?

Some important file parameters are not automatically migrated during this process. The information below will help you understand the status of your files on the EZChrom Elite system after migration.

File settings migrated

- **Save all analysis results** setting from the General options tab.

- **Automatically enable method audit trail for all projects** setting from the Logging options tab.

- **Automatically enable sequence audit trail for all projects** setting from the Logging options tab.

If the settings above are enabled in the Elite system, they will be enabled for all migrated projects.

The following settings will be migrated as enterprise-wide OpenLAB CDS settings:

- **Enable system activity log** from Logging options tab.

- **Log out current user when idle for xx min** from Security options tab.

- **Activity Log** (Enabled state only).

- **Groups** used in the Elite system are migrated to OpenLAB CDS.

- **Active authentication mode data** for **Users.**

- OpenLAB CDS user migration is limited to active authentication mode data. The Elite system can store user information for authentication modes that are not active

- **System administrator** and **instrument administrator** users are migrated, with appropriate roles and privileges set in the new system.

File settings not migrated

- **Workstation configuration parameters** settings from the workstation tab of the CSMain options page (EZChrom menu).

- **MAPI** email settings.

- **Activity log entries** (Archive and use viewer if needed)

- **Instrument status refresh period** settings.

- Current **Password Save** options. However, the single user login **mode** will be migrated, if the OLSS has API support.

The **Migration follow-up** on page 8 will help you with the final preparation of migrated file data.

Step 1: Prepare your system

1 Upgrade your system to EZChrom Elite 3.3.2 SP2: core and drivers.

2 Open EZChrom Elite and verify there are no unconfigured instrument entries that have the name **New Instrument**. If these entries exist, delete all instances from EZChrom. Multiple New Instrument entries with empty configurations will cause the EZChrom migration to fail. Confirm with the customer before making any deletions.

3 Backup the **Enterprise path** prior to beginning the migration.

4 Use the **Add/Remove Programs** application to remove the obsolete EZChrom Elite version from your system directory. Leave the EZChrom Elite directory intact.

5 Install OpenLAB CDS EZChrom Edition. Specify the old Enterprise path as the Enterprise path for the new system.

CAUTION	Do not make any additional changes to Shared Services until the migration procedure is complete.

6 Verify that OpenLAB CDS has been successfully installed on your workstation. See the *Workstation Installation Guide* (p/n M8301-90001) for complete installation procedures and resources for installation follow-up.

CAUTION	Shared Services must be installed before running the migration tool. It is installed automatically with Workstation.

Step 2: Run the migration tool

1 If you have not already done so, reboot your computer after successful OpenLAB CDS installation.

2 Insert the **OpenLAB CDS Support Disk** and copy the **Tools/OpenLAB CDS EZChrom Edition/Migration Tool** folder to the machine where the migration is needed (a suggestion is to copy to **program files/Agilent Technologies,** but the actual folder is not important). This machine must have EZChrom client or workstation installed and cannot be a Shared Services only machine.

3 Open the folder and launch **OpenLAB.MigrationTool.exe.**

4 Complete the necessary fields of the **OpenLAB CDS Elite Migration Tool Screen**:

    a. **Migrate From**:

        Workstation - Verify the Enterprise path is correct. This is the enterprise path you are migrating from. If the Enterprise path is not correct, select **Change** and enter the correct enterprise path, and select **Save**. Verify the saved Enterprise Path is correct.

        Distributed Systems – The Enterprise path you are migrating from is automatically populated with the entry from Shared Services. This path was entered during the Shared Services installation and cannot be changed for distributed systems. Verify the enterprise path is correct.

    b. **Migrate To**: The Shared Services location is automatically entered into this field for both Workstation and a Distributed System. Verify it is correct before proceeding.

    c. **Settings—**select this check-box if you want to **Perform Projects Permissions Migration** concurrently with this data file migration. Selecting this option will result in the creation of approximately 40 new OpenLAB CDS system roles to map the old Elite permissions into the new role structure.

5 Select **Gather Migration Data** to start the data gathering process (to abort select **Close**). A green bar showing the progress will display. After the migration collection process is complete, select **OK**.

6 Select **Start Migration** to start the actual migration process. The migration will start and a purple bar showing progress will be displayed unless you get the prompts below.

    Prompt For System Administrator Login - Depending on your system confifguration you could be prompted for a system administrator login. If you get this prompt, enter a system administrator user that can be used to access the Shared Services machine and select **Login**.

    Prompt For Service Account Login – Depending on your system configuration you could be prompted for a Service Account login after the System Administrator Login prompt. Enter a username and password at this prompt for the OpenLAB Instrument Service Account. This user is for distributed systems and will be added to the OpenLAB Instrument Service on the AIC. This user should be an administrator on the AIC and should be able to access the enterprise path. Enter the user and select **Login**. If your login is successful, the migration will start and the purple bar showing the migration process will display.

7 Select **OK** when prompted that the enterprise has been migrated successfully.

8 Review the migration log file (AppLog.log) generated during the migration process. This log will be created in the folder from which the migration was launched.

Step 3: Verify successful migration of your enterprise

1 Navigate to the OpenLAB Shared Services (OLSS) login screen.

2 Enter a user **login, password,** and **domain** that had administrative access for the old enterprise.

3 Review the drop-down list of the **Projects** tab, and the lists of associated instruments, to verify that all are present.

4 Verify that the **Activity Log** has been migrated and enabled via the **System Configuration** tab in OpenLAB CDS.

5 Verify that the project settings in OpenLAB contain the correct **Save all Analysis Results** and **Audit Trail** settings.

Step 4: Migration follow-up

After migration, perform the following tasks and verifications (as applicable) to fully update your system and your data files

Re-configure instrument controllers and instruments

1 Connect to an instrument (you may need to reboot the system after migration to connect). The instrument **Status Refresh Menu** in OpenLAB is accessed through the **System Configuration Menu**.

2 Using OLSS, reconfigure the Agilent LC. Select from the list of available server modules and then select **Auto Configuration** to begin the process. See the EZChrom help topic, *Configure Instrument* for more information.

Check default, user, and group privileges

1 Check the privileges for the **Default** and **other project folders** for accuracy under the OpenLAB CDS Shared Services **Edit privileges** tab.

2 Select and add users that were not migrated using the **user import** menu.

3 Create and assign **privileges** for groups and users. EZChrom Elite operates on a new project permissions model:

   a. Create a **role membership** (or memberships) using the **Edit user** option. This is a set of permissions grouped by functionality or access privilege.

   b. Assign **role memberships** to specific users and groups, also using the **Edit User** option. The system default will give these users and groups the same privileges across all projects.

   c. Check or modify user or group project privileges using the **Edit Privileges** function of the OpenLAB Shared Services.

d. To **reset** the privileges for a project, uncheck the **Inherit privileges from parent** box, and select **No** in response to the "**Would you like to copy all privileges from the parent to this object?**" question. This removes all users assigned to the project. You'll have to use the **add user** or **add group** functions to reassign users to the project.

What to do next

Your system conversion and file migration to the OpenLAB CDS EZChrom Edition is complete.

- Continue to refine your data system for operation by further configuring projects, users, and instruments. This is accomplished through the OpenLAB CDS Shared Services, which features an online help resource.

- For more information, please contact your Agilent representative.

ICM Migration

What is migrated?

The migration procedure will migrate roles, users, projects, project settings, and instruments from ICM to OpenLAB CDS EZChrom Edition. It does not support a migration from ICM to OpenLAB CDS ChemStation Edition.

User defined settings and instrument controllers are not migrated. The activity logs used by ICM are not migrated. These entries remain in ECM and can be backed up with an ECM backup procedure.

The migration tool automatically calculates and sets the storage path in OpenLAB CDS EZChrom Shared Services (OLSS) by determining the most common ECM content path.

The ICM migration tool does not migrate data. However, when you generate a SSIZIP in ICM and open the SSIZIP in OpenLAB CDS EZChrom Edition the contents of the SSIZIP migrate to the OpenLAB CDS EZChrom Edition format. Save the migrated SSIZIP in the new format back to ECM as a new revision.

Roles

- Selected built-in roles are migrated. Built-in roles that are not migrated from ICM already have corresponding roles in OpenLAB CDS.

- To migrate custom roles, select the **Available in instrument access** tab or **Available in project access** tab.

    - To create an instrument role in OpenLAB CDS with select privileges, select the **Available in instrument access** tab.

    - To create a project role in OpenLAB CDS with select privileges, select the **Available project access** tab.

    - If both the **Available in instrument access** tab and **Available in project access** tab are selected for a role, then the role will be created twice in OpenLAB CDS. The first role will be an instrument role with select privileges and the second role will be a project role with select privileges. See the example below:

> ProjInst Role (Instrument)	Migrated role from ICM server 'http://olicmvm03'
> ProjInst Role (Project)	Migrated role from ICM server 'http://olicmvm03'

- The following permissions will not be migrated from ICM roles and are only available in OpenLAB CDS EZChrom. They will need to be added manually:

    - EZChrom: Control - Print Setup

    - EZChrom: Method - Edit Running Method

    - EZChrom: Sample Prep - Edit Running Sample Prep

    - EZChrom: Sample Prep - Update Mater Sample Prep

Users and groups

- Users and Groups that are assigned to roles at the global or object level will be migrated.

- Both domain and built-in users and groups that are assigned to roles will be migrated.

- Users and groups that are not assigned to roles will not be migrated.

- Users and groups will be assigned to corresponding roles during the migration.

Projects and project settings

- Only Projects set to the drawer level in ICM will be migrated to OpenLAB CDS.

- Projects that have overlapping locations will not be migrated.

- Project and Project Settings from ICM will be migrated to the Projects Tab in OLSS. See table 1 for a summary of the project settings that will be migrated.

Table 1 Migration of project settings

Activated ICM Project Setting	Activated OLSS Project Setting
Update Method in Content During Runs With Updated Calibration Information or Retention Times	Update original methods during acquisition with analysis updates.
Allow Printing on Client For Modified Result File.	Allow Printing on Client For Modified Result File
Default Audit Trail Options	All Audit Trail Settings
N\A	Include Report Template files in Result Package

Instruments

- All instruments will be migrated to into a location in the Instruments tab in OLSS.

- Instrument configurations will be migrated along with the instrument.

- Instrument Properties such as Name, ID, Description, Location, and Instrument type will be migrated.

- When Instruments are migrated they are assigned to an Agilent Instrument Controller (AIC) named "PlaceHolderAIC" that is designated as a placeholder. Before launching the instrument a valid AIC will need to be assigned.

Step 1: Prepare your system

CAUTION	Do not continue with the migration procedure if you have OLIR installed with your ICM system. Contact support for more information.

Version requirements:

- ICM 3.3.2 SP3 or higher.
- OpenLAB CDS EZChrom Edition A.04.02 or higher. For EZChrom A.04.02, Shared Services software update 1 or higher is required.
- ECM 3.3.2 SP1 with software update 3.

Pre-migration tasks:

1 Verify software update 3 for ECM 3.3.2 SP1 is installed on the ECM Server.

2 Install OLSS on a machine that meets the requirements in the *OpenLAB CDS Hardware and Software Requirements* Guide (p/n M8301-90040).

3 Open OLSS.

   a. Select **Administration > System Configuration > Edit System Settings**.

   b. In the **Edit System Settings** window, set the authentication and file system to **ECM** and select **Next**.

   c. Enter the shared services administrative user and select **Next**.

   d. Leave the storage path blank and select **Next**. This field needs to be empty and will be set during the migration procedure.

   e. Select **Apply**. OLSS will automatically restart.

   f. Login to OLSS with ECM credentials.

   g.   In the **Administration** screen, select **System Configuration** and verify the **Authentication Provider** and **Storage Type** are set to **ECM**. The storage path field should be blank.

   h. Exit OLSS.

CAUTION	Do not make any additional changes to OLSS until the migration procedure is complete.

4 Install an OpenLAB CDS Client and set the appropriate OLSS and ECM servers.

5   In the Program menu, select **Agilent Technologies > OpenLAB CDS EZChrom Edition** and log into the **AIC and Driver Install Tool**. Select the **Drivers** tab and verify the screen under **Instrument Drivers not in OpenLAB Shared Services** is blank. If drivers appear on this screen, click the **select\unselect all** button to select all drivers and then select **Save to OLSS**. Verify the screen under **Instrument Drivers not in OpenLAB Shared Services** is now blank.

6   Close the **AIC and Driver Install Tool**.

7   If using AFS, enable AFS on the Enterprise Path.

8   Stop all acquisitions and close all instruments on the ICM system where you are performing the migration. Perform a close server on all open instruments if using client\server.

9   In ICM, verify that all instrument and project roles that you want to migrate have the **Available in instrument access** tab or the **Available in project access** tab selected on the role. This is required for the role to migrate.

10 In ECM, assign the CDSPRIV privilege to a user in the ECM system administrators group. See the ECM help topic, *ECM privileges for CDS* for more information.
    This administrator's username and password will be used in step 5 of the **Run the migration tool procedure**. This could be the same user that was used as the shared services administrator.

Step 2: Run the migration tool

1   Verify that no acquisitions are occurring on the ICM system, all instruments are closed, and all users are logged out of ICM.

2   Start the migration tool on an OpenLAB CDS EZChrom Client machine.

3   In the **Welcome** screen, select **Next**.

4   In the **OpenLAB Shared Services Administrator Login** screen, enter your Shared Services **User Name** and **Password** and select **Next**.

5   In the **ECM Server Administrator Login** screen, enter your ECM system administrator **User Name** and **Password** and select **Next**.

6   In the **ICM Data Collection** screen, the migration data collection process begins. When data collection is complete select **Next**.

7   In the **ICM Migration Report** screen, review the migration report. To stop the migration procedure, select **Cancel**. To start the migration procedure, select **Next**.

8   In the **Finalize ICM Migration** screen, when the ICM migration is complete select **Finish**. The migration is now complete.

NOTE   Do not run the migration procedure a second time.

Step 3: Verify successful migration of your enterprise

1 Verify all migrated users have the CDSPRIV privilege assigned in ECM. If this privilege is not assigned, create a role in ECM with this privilege and assign all migrated users to this role.

2 Verify that items were successfully migrated.

3 Verify Projects and Project Settings.

4 Install all Clients and AICs.

5 Assign a valid Instrument Controller to Instruments.

6 The following instruments will need to be reconfigured:

- Classic Agilent LCs
- 7890GCs
- Headspaces
- ss420x

7 Launch a migrated instrument in a migrated project and perform a test run.

Step 4: Point transfer from ICM to OpenLAB CDS EZChrom

After running the migration tool you can choose to run both OpenLAB CDS EZChrom Edition and ICM in parallel and transfer pieces of the system. The criteria for doing this are as follows:

- The migration procedure moves a project and the contents of a project. A migrated project can still be used in ICM until it is decided that it will be used in OpenLAB CDS EZChrom. When it is decided that a project will be used in OpenLAB CDS EZChrom, all contents of the project need to be moved over at one time. This includes all instruments associated with a project. You cannot use the same project in both OpenLAB CDS EZChrom and ICM.

- Any roles, users, groups, or instruments created in ICM after running the ICM migration procedure need to be created manually in OpenLAB CDS EZChrom Edition. The ICM migration procedure cannot be run a second time.

- You cannot use the same ECM content structure for both OpenLAB CDS EZChrom and ICM.

- Data, Methods, Sequences, and Templates for OpenLAB CDS EZChrom Edition need to be in separate ECM folders from the Data, Methods, Sequences, and Templates for ICM.

- Data opened in ICM should not be opened in OpenLAB CDS EZChrom until it has been decided that the project will moved to OpenLAB CDS EZChrom and solely used by OpenLAB CDS EZChrom.

- OpenLAB CDS EZChrom files should not be opened in ICM.