



Thank you for purchasing an Agilent software solution. 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.

Customer Information

Customers should provide all necessary operating supplies upon request of the engineer.

Service Engineer’s Responsibilities

- Complete empty fields with the relevant information.
- Only printout pages that relate to the system that has been installed.
- Complete the relevant checkboxes in the checklist using a “X” or tick mark “✓” in the checkbox.
- Mark any section as Not Applicable to indicate product functionality not included
- Complete the Service Review section together with the customer.
- Complete the Service Completion Section.

Additional Instruction Notes

- For detailed Installation procedures, refer to Disk 1 for the
 - *OpenLAB CDS – Workstation Installation Guide*
 - *OpenLAB CDS – Networked Workstation Installation Guide*

System Information

- Locate appropriate license authorization codes and/or license certificates and verify against sales order.
- Record all of the software product numbers, revision numbers, and license numbers in the table below
 - Check this box if an instrument configuration report is attached instead of completing the table.

Software product number	Revision number	License number
1.		
2.		
3.		
4.		
5.		
6.		



General Preparation

- Unpack and verify the condition and completeness of shipment. For discrepancies, use the table below.

Product or part description	Observation	Action

- Check that any customer-supplied hardware and software meet the requirements in the OpenLAB **Data Analysis** Site Prep Document.
- Before installing software, it is recommended to run the **Automated Site Prep Tool** to check the customer's PC or Server with regard to minimum requirements.
- Discuss any specific questions or issues with the customer prior to starting.
- Discuss any configuration options with the customer prior to 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.
- Upgrades only** – Ensure with customer that instrument control settings, data, methods etc have been properly saved or archived prior to starting any installation procedures. Remove all software updates that were applied to the previous system prior to installing A.01.05.
- Explain that the Registration Packet and license number must be stored in a secure place. Show the customer the support directory location. Explain the Software Status Bulletin (SSB).



Workstation Installation – OpenLAB Data Analysis Only

- Log into Windows as a local Administrator.
- Check if a printer driver is installed on the system.
- Verify that the regional settings are set to English-US.
- Install and Configure TCP/IP hardware if the instrument will be connected using LAN.
- If not already installed, install Microsoft .NET Framework 4.0:
 - Start the OpenLAB Master Installer (Disk 1).
 - From **Third Party Tools**, select **.NET Framework 4.0**.
 - In the Microsoft .NET Framework 4 Setup, read and accept the license terms.
 - Press **Install** to begin the installation.
 - After the installation completes, press **Finish**.
- Start the OpenLAB CDS Master Installer (Disk 1) and follow the wizard to install:
 - Select **OpenLAB Data Analysis**.
 - Read the license terms and agree to continue. Click **Next**.
 - Select the Installation folder. Check the box to run an IQ after installation. Click **Next**.
 - Select **Standalone Workstation** as the Installation type. Click **Next**.
 - Click **Start** to begin the installation.
 - If successful, reboot the Workstation and log back in as a local Administrator.

OLSS Configuration

Refer to the **online help** for directions on how to do the following tasks.

Configure Security and Storage

- 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** (EZChrom only) to desired settings. When complete, the Control Panel will restart.
- Log back into the Control Panel with OpenLAB CDS System Administrator credentials.

Configure Users/Groups/Roles

- 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 OpenLAB CDS Roles and assign **Users** or **Groups** to those Roles.



Configure License Server

- Select **Licenses** in the navigation window. Add a valid license file or server to activate the OpenLAB CDS Workstation Software.

Configure Projects

- Launch the **OpenLAB Control Panel** and navigate to **Projects**.
- Create a **TEST** project and configure the project settings.
- Copy the demo data from disk 8 to the data path of the project.

Installation Qualification and Startup

- Run the **Installation Qualification Tool** to ensure correct installation.
- From the Control Panel, launch a **Data Analysis** session.

OpenLAB Data Analysis User Documentation

- Explain where to find the introduction and workflow videos for OpenLAB Data Analysis.

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 Service Engineer Comments section below if there are additional comments.
- Review the installation/upgrade with the customer.
- Explain Agilent warranty for instruments.
- Explain how to use manuals, guides, online help.
- Explain how to get self-help, FAQs from the web.
- Explain how to log an instrument service call, support services available.
- Advise customer of additional instrument training options.
- If the instrument firmware was updated, record the details of the change in the Service Engineer Comments box below 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.

Important Customer Web Links

For additional information about our solutions, please visit our web site at www.chem.agilent.com

How to get information on your product: Literature Library - www.agilent.com/chem/library (enter "OpenLAB" in the empty field and click the  icon)

Need to know more? - www.agilent.com/chem/education

Need technical support, FAQs? - www.agilent.com/chem/techsupp

Need supplies? - www.agilent.com/chem/supplies

OpenLAB CDS Software Updates - agilent.subscribenet.com

Service Completion

Service Request number.....

Date service completed.....

Agilent Signature.....

Customer Signature.....

Total no. of pages for this document:.....