Agilent OpenLAB Chromatography Data System (CDS)

Secure Workstation for OpenLAB
CDS ChemStation Edition
Installation Guide

Agilent Technologies

Notices

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This product may be used as a component of an in vitro diagnostic system if the system is registered with the appropriate authorities and complies with the relevant regulations. Otherwise, it is intended only for general laboratory use.

Software Revision

This guide is valid for revision A.02.02 of Agilent OpenLAB CDS.

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CAUTION

A **CAUTION** notice denotes a hazard. It calls attention to an operating procedure, practice, or the like that, if not correctly performed or adhered to, could result in damage to the product or loss of important data. Do not proceed beyond a **CAUTION** notice until the indicated conditions are fully understood and met.

WARNING

A WARNING notice denotes a hazard. It calls attention to an operating procedure, practice, or the like that, if not correctly performed or adhered to, could result in personal injury or death. Do not proceed beyond a WARNING notice until the indicated conditions are fully understood and met.

In this Guide ...

This installation guide is designed to help installing the Agilent Secure Workstation for OpenLAB CDS ChemStation Edition quickly and correctly.

Table 1 Terms and abbreviations used in this document

Term	Description
Data Store	OpenLAB Data Store
ChemStation	OpenLAB CDS ChemStation Edition
Secure Workstation	Secure Workstation for OpenLAB CDS ChemStation Edition

1 Introduction

This chapter gives you an overview of the Secure Workstation for OpenLAB CDS ChemStation Edition. It also includes certain requirements before starting the installation.

2 Configure your Workstation PC

Some manual configuration changes are required in order to provide optimum performance. This chapter describes how to configure your workstation computer.

3 Install the Software

The installation is automated for you by the included OpenLAB CDS Master Installer. This tool installs the various components of OpenLAB CDS.

4 Configure Secure Workstation for OpenLAB CDS ChemStation Edition

This chapter describes the configuration of Secure Workstation for OpenLAB CDS ChemStation Edition.

5 Secure Workstation for OpenLAB CDS ChemStation Edition Licensing

This chapter describes the licensing of a Secure Workstation for OpenLAB CDS ChemStation Edition.

6 User Management

This chapter contains instructions for the user management.

7 Optional Procedures

This chapter includes information on the Software Verification Tool and on the upgrade of Secure Workstation for OpenLAB CDS ChemStation Edition.

8 Uninstall the Software

This chapter contains information on the uninstallation by using the OpenLAB CDS Uninstallation Wizard.

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Before You Begin 11

This chapter gives you an overview of the Secure Workstation for OpenLAB CDS ChemStation Edition. It also includes certain requirements before starting the installation.

Who Should Read This Guide?

This installation guide is designed to help system administrators and other users install the Agilent OpenLAB Chromatography Data System (CDS) Secure Workstation quickly and correctly.

System Architecture

Figure 1 Secure Workstation configuration

Secure Workstation includes the OpenLAB Data Store software that consists of the following two components:

- OpenLAB Data Store web interface

  OpenLAB Data Store provides a thin client web based user interface that can be accessed using Microsoft Internet Explorer. The web interface provides access to the Data Store folders and files.

- OpenLAB Control Panel

  The OpenLAB Control Panel is the user interface that provides access to administrative functions used for managing OpenLAB Data Store and OpenLAB Shared Services.

The Agilent Secure Workstation for OpenLAB CDS ChemStation Edition

The Secure Workstation provides OpenLAB CDS ChemStation Edition and OpenLAB Data Store on one Windows machine.

Secure Workstation is specially designed to provide a workstation that is compliant with 21 CFR Part 11[1] and can control up to two instruments.

The Agilent Secure Workstation for OpenLAB CDS ChemStation Edition is provided on several DVDs. The following table lists the DVDs you will receive for your software edition.

Table 2 OpenLAB CDS Components

Disk name	Disk number
OpenLAB Data Store	ol-ds
OpenLAB CDS Shared Services Software	1
OpenLAB CDS ChemStation Edition Core Software	2
OpenLAB CDS ChemStation Edition Drivers	3
OpenLAB Support & Utilities	6

[1] Code of Federal Regulations includes the US Federal guidelines for storing and protecting electronic records and applying electronic signatures

Before You Begin

To simplify installation of the software, it is helpful to decide on some configuration options before you begin the actual software installation.

1. For installing OpenLAB CDS, you need to have administrator privileges for your workstation. Power user privileges are not sufficient (the installation does not start).
2. Decide on a directory location to store all files related to the data system software, including data, methods, sequences, and configurations.
3. Decide on the software delivery approach you want to use:
   - *Install directly from the DVDs to your computer* – Load the disks as required directly to the workstation disk drive. (Recommended)
   - *Copy DVDs to a centralized location for installation* – You can use the utility to copy DVD content to a network share folder or USB drive, and run an uninterrupted installation from that location. This approach will save time; when you install from the folder, you won't have to reload the disks. However, some networks may interfere with installation.
4. Remember that when you launch the application, you will be able to review the following PDFs in the installer **Planning** and **Resources** menus before you install the software.

   Under the **Installer Planning** menu, you will find:
   - *OpenLAB CDS Hardware and Software Requirements* – Use this PDF to determine whether your hardware and software will support the system.
5. Install all required hardware, including any A/D boards, cables, GPIB interfaces, instrument detectors, and communication cables.

1 Introduction

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Some manual configuration changes are required in order to provide optimum performance. This chapter describes how to configure your workstation computer.

About Configuration

Some changes within this document are mandatory for Secure Workstation for OpenLAB CDS ChemStation Edition to work properly on a Windows system. Some changes will optimize application performance. Other changes will have a graphical or minor impact.

NOTE

To indicate the relative importance of individual settings, each item is categorized as:

MUST: These changes must be applied.

PERFORMANCE: These changes will improve system performance.

OPTIONAL: Most of these changes will affect the graphical display of the application.

NOTE

If User Account Control (UAC) is switched on, some configuration steps will require active confirmation to continue.

Install Windows

NOTE Keep your PC disconnected from the internet until you have installed the appropriate security patches and hot fixes. It is strongly recommended to install the latest security fixes as supported from Agilent Technologies and virus definitions prior to connecting to a network.

1 Install Windows from the Microsoft installation media. During the setup, provide the computer name, administrator password and network settings. Choose to either join an existing domain or set up the system in a workgroup mode.

2 To secure your system against viruses please install an antivirus program. Be sure to open the firewall ports listed in the Firewall Settings in the *OpenLAB CDS Network Requirements* guide.

NOTE Running antivirus programs might influence the behavior and performance of your computer. Some virus scanners might cause issues when used with OpenLAB CDS. OpenLAB CDS was tested to run with Symantec's Endpoint Protection.

Use the OpenLAB CDS Configuration Checker

NOTE This tool is only available for OpenLAB CDS ChemStation Edition on Windows 7.

The OpenLAB CDS Configuration Checker checks and repairs all *mandatory* settings. It does not check optional settings or settings that improve the performance.

The OpenLAB CDS Configuration Checker comes as .diagcab file, which is a file format used with the Microsoft Windows Troubleshooting Platform (WTP) program. The Microsoft Windows Troubleshooting Platform (WTP) is a platform to locate and fix hardware and software settings in Windows. It is used specifically for diagnosing and repairing computer settings.

In general, .diagcab files are useful for deploying troubleshooting packs because they are self-contained and require no installation. They can be deployed onto web sites, network shares, or copied to USB keys. The .diagcab file name extension is a registered file name extension that can be executed by WTP.

To start the OpenLAB CDS Configuration Checker, call the file Agilent.Wtp.ChemStation.WindowsConfiguration.diagcab. This file is located on the OpenLAB CDS disc 6 under Tools\OpenLAB CDS ChemStation Edition\Diagnostics\WindowsConfiguration\Cab\

NOTE While using the Configuration Checker:

- Ensure that this computer is not turned off by another user.
- Ensure that the menu bar is enabled.

Configure Windows 7

[MUST] **1** Go to **Start > Control Panel > System**[1], and register Windows with Microsoft.

[MUST] **2** Folder Options (Go to **Start > Control Panel > Folder Options**): In the **View** tab,

- Clear **Hide extensions for known file types**.
- Enable **Display the full path in the title bar**.
- Clear **Use Sharing Wizard**.

[MUST] **3** Check for updates and apply all critical security patches (Go to **Control Panel > Windows Update**):

Click **Check for updates**.

[MUST] **4** Settings for updates (Go to **Control Panel > Windows Update**):

Click **Change settings**. In the **Important updates** section, select **Never check for updates**. Clear the other update options.

NOTE This setting is important to avoid data loss due to system reboot during data acquisition.

[MUST] **5** Disable Services (Go to **Control Panel > Administrative Tools**):

a Double-click **Services**.

b Double-click the following services and set their startup type to **Disabled**:

- **Application Experience**
- **Desktop Window Manager Session Manager**

[1] View the items by icon to see a list of all items.

[MUST] **6** Disable indexing (Go to **Control Panel > Indexing Options**):

Click the **Modify** button. Clear all drives and locations.

7 Windows logon options (**Start > search for 'gpedit.msc'**)

[MUST]
- **a** Navigate to **Local Computer Policy > Computer Configuration > Administrative Templates > System > Logon**.
- **b** Set **Hide entry points for Fast User Switching** and **Always use classic logon** to **Enabled**.

[MUST] **8** Adjust Power Options (Go to **Control Panel > Power Options**):

- **a** As preferred plan select **High performance**
- **b** Click **Change Plan settings**
- **c** Set the option **Put the computer to sleep** to **Never**.
- **d** Click **Change advanced power settings**.
- **e** Open the nodes for **Hard disk > Turn off hard disk after**.
- **f** Set the Minutes to 0 (=Never).

[MUST] **9** Local Security Policy: (Go to **Control Panel > Administrative Tools**):

- **a** Double-click **Local Security Policy**.
- **b** Navigate to **Security Settings > Local Policies > Security Options**
- **c** Double-click the following policy listed in the right hand panel: **Network Access: Sharing and security model for local accounts**
- **d** In the displayed dialog select the following item from the drop-down list: **Classic - local users authenticate as themselves**

[MUST] **10** Region and Language (Go to **Control Panel > Region and Language**).

- **a** Regional options should be set to **English (United States)** from the drop-down list.
- **b** If regional format other than **English (United States)** is used, the following settings are mandatory. The settings can be defined by clicking on the **Additional settings...** button:
  - Decimal symbol = . (point)
  - Digit grouping symbol = , (comma)
  - List separator =, (comma)

[MUST] **11** Time Zone (Go to **Control Panel > Date and Time**): Choose the time zone of your machine's location.

[MUST] **12** Power Management for network devices (Go to **Control Panel > Network and Sharing Center**):

a Select **Change adapter settings**. Right-click **Local Area Connection > Properties > Configure**.

b On the **Power Management** tab, clear all check boxes.

[MUST] **13** Enable non-http activation (Go to **Control Panel > Programs and Features**):

a Click **Turn Windows features on or off**.

b Expand the **Microsoft .NET Framework 3.5.1** node and select the **Windows Communication Foundation Non-HTTP Activation** check box.

[MUST] **14** Disable Compatibility View in Internet Explorer.

NOTE This step is only required if you use OpenLAB Data Store.

---

a Open Internet Explorer.

b Click the Tools menu, and then click **Compatibility View Settings**.

c Clear the **Display intranet sites in Compatibility View** check box.

[PERFORMANCE] **15** Performance options (Go to **Control Panel > System**):

a Click **Advanced system settings**.

b On the **Advanced** tab > **Performance** click **Settings**.

c On the **Visual Effects** tab, select **Adjust for best performance**.

d Save the settings.

[PERFORMANCE] **16** System Properties (Go to **Control Panel > System**):

a Click **Advanced system settings**.

b On the **Advanced** tab > **Performance** click **Settings**.

- **Advanced** tab > **Virtual Memory**: For optimum performance use the **Change** button to adjust the paging file size to a value of 2 to 3 times of the physical RAM on the PC. If possible locate the paging file on a drive different from system and ChemStation installation drive.
- **Data Execution Prevention** tab: Select **Turn on DEP for essential Windows programs and services only**.

c **Advanced > Startup and Recovery > Settings** button:

- **System startup** section:

  Change both **Time to display ...** fields from **30** to **3** sec.
- **System failure** section:

  Select **Automatically restart**, in the **Write debugging information** section select **Kernel memory dump** from the drop-down list.

d **Remote** tab

- In the **Remote Assistance** section, clear the check box **Allow Remote Assistance connections to this computer**.
- In the **Remote Desktop** section, select **Don't allow connections to this computer**.

[OPTIONAL] **17** General Layout: (right-click **Start > Properties**)

a **Start Menu** Tab: In the **Privacy** section select both items

b **Start Menu** Tab > **Customize** button: In **Customize Start Menu** dialog:

- Clear the following option:
  - **Favorites menu**
- Select the following options:
  - Computer **Display as a link**
  - **Connect To**
  - Control Panel: **Display as a menu**
  - **Default Programs**
  - **Devices and Printers**
  - Documents: **Display as a link**
  - **Enable context menus and dragging and dropping**
  - Games: **Don't display this item**
  - **Help**
  - **Highlight newly installed programs**
  - Music: **Don't display this item**
  - **Network**
  - **Open submenus when I pause on them with the mouse pointer**
  - Personal folder: **Display as a link**
  - Pictures: **Display as a link**
  - **Run command**
  - Search other files and libraries **Search with public folders**
  - **Search programs and Control Panel**
  - **Sort All Programs menu by name**
  - System administrative tools: **Display on the All Programs menu and in the Start menu**
  - **Use large icons**

[OPTIONAL] **18** Welcome Center (**Start > search for 'gpedit.msc'**):

a Navigate to **Local Computer Policy > Computer Configuration > Administrative Templates > System > Logon**.

b Set **Don't display the Getting Started welcome screen at logon** to **Enabled**.

[OPTIONAL] **19** **Recycle Bin Properties**: (right-click on desktop icon **Recycle Bin**) Select the following options:

- **Custom size**: Select a size corresponding to approximately 10% of the complete disk space for the drive.
- Select **Display delete confirmation dialog**.

Repeat these steps for all drives of your computer.

[OPTIONAL] **20** Language for non-Unicode programs (Go to **Control Panel > Region and Language**): On the **Administrative** tab, click **Change system locale...**. From the drop down list, select **English (United States)**

NOTE Do not the change system locale if you are using an English, Japanese or Chinese Operating System.

Configure Windows 8.1

[MUST] 1 Go to **Start > Control Panel > System**[1], and register Windows with Microsoft.

[MUST] 2 Folder Options (Go to **Start > Control Panel > Folder Options**): In the **View** tab,

- Clear **Hide extensions for known file types**.
- Enable **Display the full path in the title bar**.
- Clear **Use Sharing Wizard**.

[MUST] 3 Check for updates and apply all critical security patches (Go to **Control Panel > Windows Update**):

Click **Check for updates**.

[MUST] 4 Settings for updates (Go to **Control Panel > Windows Update**):

Click **Change settings**. In the **Important updates** section, select **Never check for updates**. Clear the other update options.

NOTE This setting is important to avoid data loss due to system reboot during data acquisition.

[MUST] 5 Disable Services (Go to **Control Panel > Administrative Tools**):

a Double-click **Services**.

b Double-click the **Application Experience** service. Set the startup type to **Disabled**.

[MUST] 6 Disable indexing (Go to **Control Panel > Indexing Options**):

Click the **Modify** button. Clear all drives and locations.

[1] View the items by icon to see a list of all items.

[MUST] **7** Adjust Power Options (Go to **Control Panel > Power Options**):

- **a** As preferred plan select **High performance**
- **b** Click **Change Plan settings**
- **c** Set the option **Put the computer to sleep** to **Never**.
- **d** Click **Change advanced power settings**.
- **e** Open the nodes for **Hard disk > Turn off hard disk after**.
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[MUST] **8** Local Security Policy: (Go to **Control Panel > Administrative Tools**):

- **a** Double-click **Local Security Policy**.
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- **d** In the displayed dialog select the following item from the drop-down list: **Classic - local users authenticate as themselves**

[MUST] **9** Region settings (Go to **Control Panel > Region**).

- **a** Regional options should be set to **English (United States)** from the drop-down list.
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[MUST] **11** Power Management for network devices (Go to **Control Panel > Network and Sharing Center**):

- **a** Select **Change adapter settings**. Right-click **Local Area Connection > Properties > Configure**.
- **b** On the **Power Management** tab, clear all check boxes.

[MUST] **12** .NET settings (Go to **Control Panel > Programs and Features**):

a Click **Turn Windows features on or off**.

b Enable .NET 3.5 by selecting the **.NET Framework 3.5 (includes .NET 2.0 and 3.0)** check box.

This option requires an internet connection.

NOTE If the computer has no internet access, .NET Framework 3.5 will not install. For more details see http://support.microsoft.com/kb/2785188.

c To make sure that all the net.tcp components are properly initialized, non-http activation must be enabled. Expand the **.NET Framework 3.5 (includes .NET 2.0 and 3.0)** node and select the **Windows Communication Foundation Non-HTTP Activation** check box.

[MUST] **13** Disable Compatibility View in Internet Explorer.

NOTE This step is only required if you use OpenLAB Data Store.

a Open Internet Explorer.

b Click the Tools menu, and then click **Compatibility View Settings**.

c Clear the **Display intranet sites in Compatibility View** check box.

[PERFORMANCE] **14** Performance options (Go to **Control Panel > System**):

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c On the **Visual Effects** tab, select **Adjust for best performance**.

d Save the settings.

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- **Advanced** tab > **Virtual Memory**: For optimum performance use the **Change** button to adjust the paging file size to a value of 2 to 3 times of the physical RAM on the PC. If possible locate the paging

file on a drive different from system and ChemStation installation drive.

- **Data Execution Prevention** tab: Select **Turn on DEP for essential Windows programs and services only**.

c **Advanced > Startup and Recovery > Settings** button:

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- **Custom size**: Select a size corresponding to approximately 10% of the complete disk space for the drive.
- Select **Display delete confirmation dialog**.

Repeat these steps for all drives of your computer.

[OPTIONAL] **18** Language for non-Unicode programs (Go to **Control Panel > Region**): On the **Administrative** tab, click **Change system locale...**. From the drop down list, select **English (United States)**

NOTE Do not the change system locale if you are using an English, Japanese or Chinese Operating System.

Edit the Security Settings for LC/MS and CE/MS Systems

The following sections summarize all security settings required for LC/MS and CE/MS. All other security settings are set automatically by the OpenLAB CDS Master Installer.

OpenLAB CDS needs to be installed using an operating system Administrator user account. To run the system with the configured options outlined in this document, all users and power users should use the same settings.

Firewall

On PCs controlling LC/MS or CE/MS systems, it is recommended to turn off the firewall.

Advanced Network Settings

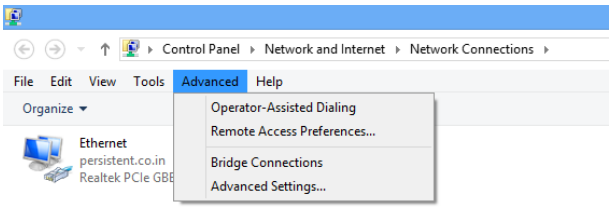
The communication with the MS is sensitive to the order NICs in the **Adapters and Bindings** dialog.

1 Go to **Start > Control Panel**.

Go to **Network and Sharing Center**[1].

2 Click **Change adapter settings**.

3 Press **ALT** to bring up the menu.



[1] View the items by icon to see a list of all items.

4 Select **Advanced Settings...**.

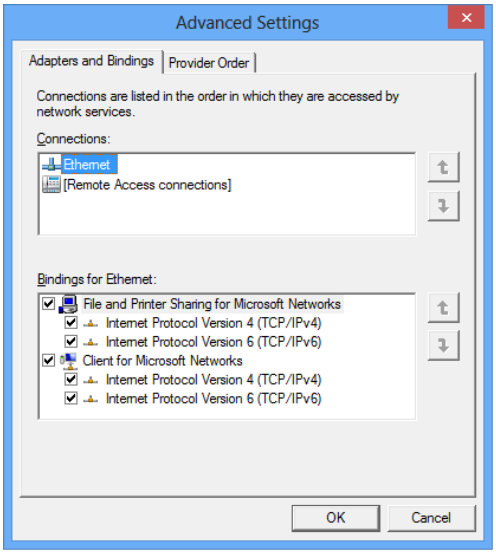


Figure 2 **Advanced Settings** dialog, **Adapters and Bindings** tab

5 In the **Adapters and Bindings** tab (see Figure 2 on page 28):

a Make sure that the Local Area Connection pertaining to the **LC/MS** or **CE/MS** NIC is the first item in the list of connections

NOTE

The names of your LAN cards may differ from those shown in the example. You can tell which LAN card is the Instrument LAN by comparing the IP addresses assigned to the LAN cards.

The LAN pertaining to the company intranet > internet will typically have an IP address assigned by organizations Static IP policy or by a DHCP server. Check with your network administrator.

Configure the Antivirus Program

Be sure to open the firewall ports listed in the Firewall Settings in the *OpenLAB CDS Network Requirements* guide.

NOTE Some virus scanners might cause issues when used with OpenLAB CDS. OpenLAB CDS was tested to run with Symantec's Endpoint Protection.

In order for the OpenLAB software to function correctly, you should configure any antivirus real time protection software with the following list of folder exclusions. These folders should only be scanned while the instruments are idle and no data acquisition takes place. Refer to your specific antivirus software documentation on how to configure folder exclusions.

NOTE The following sections contain general information and also specific details only applicable for OpenLAB CDS ChemStation Edition (e.g. the chem32 folder).

- C:\chem32, D:\chem32, etc.
- C:\programdata\agilent
- %programfiles%\agilent
- %programfiles(x86)%\agilent
- %programfiles%\common files\agilent
- %programfiles(x86)%\common files\agilent
- %programfiles%\agilent technologies
- %programfiles(x86)%\agilent technologies
- %programfiles%\common files\agilent technologies
- %programfiles(x86)%\common files\agilent technologies
- %programfiles%\common files\agilent shared
- %programfiles(x86)%\common files\agilent shared

Process	Directory	File name
ECM upload/download (if applicable)	%temp% for Windows users (=Users' temp directory)	*.ssizip
Standard reports	%temp% for Windows users (=Users' temp directory) /chem32/core	~p3d*.tmp ~job*.tmp Hpspl00.que
CDS intelligent reports	%LOCALAPPDATA% %APPDATA% %PROGRAMDATA%	Files on: • Agilent • Agilent Technologies • Agilent_Technologies,_Inc • IsolatedStorage • Temp e.g.: C:\Users\xxxxx\ AppData\Local\ Agilent Technologies\Intelligent Reporting\ RawDataFileCache

If your antivirus software includes program or executable deny execution settings, ensure that the following program files are not denied execution. You can use the windows search feature to find the specific folder each program file is located in.

- agilentiolibrariesservice.exe
- chemmain.exe
- apg_top.exe
- iprocsvr.exe
- iproc8491.exe
- msinsctl.exe
- httpdmsd.exe
- epcsetup.exe

NOTE Depending on your specific configuration, some of the listed folders or files may not exist on your system.

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The installation is automated for you by the included OpenLAB CDS Master Installer. This tool installs the various components of OpenLAB CDS.

Step 1: Run the Application

To run the application for the first time on your workstation:

1. For the direct DVD approach, insert the OpenLAB CDS Installation disk (Disk1). The **Planning** screen starts automatically after inserting the DVD.

   If the installer is not launched automatically, run Autorun.inf to open this screen.

2. For the portable data storage device approach, insert the device in a computer USB port, navigate to \Disk1\Setup.bat and run the application to proceed to the **Planning** screen.

3. For the share file approach, copy all DVDs to a centralized folder as described in Step 2 below.

Step 2: Copy DVDs to a Centralized Folder for Installation (Optional)

Completing this step will enable you to run an uninterrupted installation directly from a folder–i.e., you will not have to load individual disks during actual installation.

1 From the Master Installer **Planning** screen, select **Installation** from the sidebar menu.

2 Select **Preparation of an Installation from Network Share**.

3 At the **Network Share** screen, browse to a directory and create a destination folder as follows:

NOTE Installations into the root of a drive may cause problems during operations and are not supported.

   a Select the button with the three dots.

   b Navigate to the directory where you want to create the folder (you can navigate to a USB drive port to create the folder on a USB drive).

   c Select **Make New Folder**.

   d Type in the folder name.

   e Select **OK**. The system will return you to the **Network Share** screen, with the path displayed.

   f Select the **Secure Workstation Disks** to copy to the folder.

   g Select **Start.**

   h Follow the prompts to insert new disks as they appear.

4 When processing is complete, copy the files to the local drive or map the location to a network drive.

5 Close the application and navigate to the directory and folder you created. Open the folder.

6 Select the Disk 1 folder, then execute Setup.bat to run the application.

   The system will display the installer **Planning** screen.

Step 3: Run the System Configuration Checker

1 At the **Planning** screen, select **System Configuration Checker**.

2 The **Site Preparation Tool** opens. Select the correct edition and setup of the OpenLAB CDS software you are installing from the drop-down list:

- **Secure Workstation for OpenLAB CDS ChemStation Edition**

3 Select **OK**.

4 Complete page 1 of the **Contact Information—System details** by typing in the fields provided.

- System Location fields
- System Information fields
- Configuration fields

5 Review the system details and make any necessary entries. The system will follow the paths specified.

6 Select the green check mark icon in the top left corner of the screen to begin the software check. A summary report is displayed showing the results for each check category. Results are expressed as **Pass**, **Warning**, **Critical Warning**, or **Fail**.

Fail results must be corrected before continuing with the installation. Agilent recommends investigating and correcting any **Critical Warnings** and **Warnings** whenever possible before proceeding.

NOTE

If the firewall is controlled by security software, the Site Preparation Tool cannot read the firewall settings because of security limitations. As a consequence, the Site Preparation Tool will display **Status "Fail"** for the firewall settings.

In this case, make sure the firewall is disabled and enter the status in the Site Preparation Tool report manually.

7 To view details of the report, select the appropriate link: **System Hardware Details**, **Operating System and Software Details**, or **Manual Verification Required**.

8 To save the report, select the **Save** icon at the top left of the screen.

9 E-mail the saved report to your Agilent Service Representative for evaluation, and for validation of your personal computer for Agilent Software Systems Installs.

Step 4: Prepare Third Party Tools

The **OpenLAB CDS Master Installer** offers a list of tools that can be installed directly from the **Installation** screen.

Install Adobe PDF Reader

You need *version 11* of Adobe PDF Reader to ...

- view site prep or administrative reports (such as system reports)
- use the **Report Viewer** feature (ChemStation Edition only)
- view Software Verification Reports

If Adobe PDF Reader is not installed on your system, or if an older version is installed:

1 Select **Third Party Tools** and then **Adobe PDF Reader**.

   a The Adobe Reader setup screen appears. Click **Install** to continue.

   b If Adobe Reader was successfully installed, click **Finish** to exist the setup screen.

   Alternatively, you can install Adobe Reader version 11 from the OpenLAB CDS installation DVDs. It is available on Disk1/Tools/Adobe Reader in four language versions (English, Japanese, Chinese and Portuguese).

   Run the self-extracting exe-file of your choice and follow the instructions of the Adobe Reader XI Setup wizard.

NOTE If you install Adobe PDF Reader directly from the DVDs: When OpenLAB CDS users open a PDF file for the first time, they will be asked to confirm the Adobe Reader license agreement. This dialog will appear for each newly configured instrument.

Step 5: Run the OpenLAB CDS Installation Wizard

At this point, you'll either be running your installation using the DVDs directly, or from a centralized location (USB drive or share folder). The installation steps are identical, until you start the installation wizard: *you won't be prompted to load the DVDs if you are installing from a centralized location.*

License Agreement Screen

1. From the OpenLAB CDS Master Installer screen, select **Installation**.
2. Select **Secure Workstation for OpenLAB CDS ChemStation Edition**.
3. The **OpenLAB CDS Installation Wizard** opens. Read the terms of the **License Agreement**. Master Installer provides a printable PDF of the license agreement under the **Resources** option of the main menu.
4. Select **I agree with the terms and conditions**. You cannot proceed with installation unless you agree to these terms.
5. Select **Next** to proceed to the **Installation Folder** screen.

Installation Folder Screen

1 Type the folder name or browse to the directory where you want to store the application components. Folders must have English names.

NOTE Installations into the root of a drive may cause problems during operation and are not supported.

2 To run an installation verification as part of this installation, select **Run Software Verification**. The Software Verification Tool provides documentary evidence that your system has been built and installed correctly, and that all design specifications have been met. You can run the Software Verification Tool at a later time if you prefer (see "Run an Software Verification after Software Installation" on page 54).

3 Select **Next** to proceed to the **Installation type** screen.

Installation Type Screens

1 Under **Installation folder**, type the folder name or browse to the directory where you want to store the application components. Folder names must be entered without spaces.

2 Select the check box **Install IO Library**, to install the Agilent IO Library Suite if one of your instruments requires it.

3 Select **Next** to proceed to the **Additional items** screen.

4 Under **Data Store Server Content Files Directory**, type the folder name or browse to the directory where you want to store the content files. Folder names must be entered without spaces.

5 Under **Data File Directory**, type the folder name or browse to the directory where you want to store the PostgreSQL database files. Folder names must be entered without spaces.

6 Select **Next** to proceed with the **OpenLAB Shared Services Database** screen.

7 Under **OpenLAB Shared Services Database**, type the **Database name**.

   a Select the check box **Use PostgreSQL server authentication**.

   b Create user and administrator accounts as required.

8 Select **Next** to proceed to the **Summary** screen.

Summary Screen

1 Review the installation settings that you have selected in the preceding steps. Select **Back** as necessary to change installation settings, or **Cancel** to cancel the installation.

2 Select **Start** to begin installation.

If OpenLAB CDS has been installed and uninstalled before, a warning will be shown that the system detected existing OpenLAB Shared Services database files. You can either:

- Click **Yes** to create new database files.
- Click **No** to reuse existing database files. At the end of the installation, a warning will be shown about the application being already registered; you can ignore this warning.

3 The system performs an automated system check before it proceeds with the listed activities.

If a *system check passed* message appears, installation continues.

If a *system check failed* message appears, you can either:

- Decline to view the system report, and continue installation.
- View the system report, and decide to continue installation.
- View the system report and postpone installation until the problem is fixed.

NOTE To view the system report as PDF file, Adobe PDF Reader must be installed (see "Install Adobe PDF Reader" on page 35).

- Decline to view the system report and postpone.

4 If you are installing directly from the DVDs, follow the **Insert Disk** prompts as they appear.

If you are installing from a local drive, you won't insert disks or browse to disk folders – the entire installation will run automatically, based on your installation settings.

If the **OpenLAB CDS Installation Wizard** cannot locate a necessary file (whether on a disk or in a folder), a **Disk or File not found** prompt will appear.

For disks, follow the prompts to:

- **Retry** using the same disk.
- Insert the correct disk (if you made an error), and select **OK**.
- Select **Cancel** to cancel the installation. The system will uninstall any components installed so far.

If a file in a centralized folder cannot be found, you may have to recreate the folder. See "Step 2: Copy DVDs to a Centralized Folder for Installation (Optional)" on page 33 above.

If the installation of any vital application or component fails, the installation will roll back (uninstall). If a failed component can be installed at a later time without affecting basic installation (e.g. Drivers) the installation will proceed. In this case you will be notified of any failure(s), and that further steps are necessary to fully complete installation.

5 If an installation verification was completed as part of this installation, review the *Software Verification Report*. If the report indicates failure, verify the computer requirements and reinstall the data system. Do not use the system until the Software Verification Report gives a 'pass' result.

6 Click **Next** to proceed to the **Installed Features** screen.

7 Click **Finish** to close the installation wizard.

Post Installation Tasks

Disable Auto Update Notification in Flash Player

Adobe periodically updates the Flash Player with new features or security fixes, and notifies users with an installed Flash Player when an update is available. To disable the notification of updates:

1. Right-click on any **Flash** content, select **Settings**, **Advanced** and click the **Global Notifications Settings** tab in the **Flash Player Settings Manager**.
2. Clear the **Notify me when an update to Adobe Flash Player** is available check box to stop receiving notifications.
3. Close the **Settings Manager**. The Flash Player automatically remembers the new settings.

What to do Next

After you have acquired and installed your *final software license*, you will continue to prepare your data system for operation by end users by configuring projects, users, and instruments. This is accomplished through the *OpenLAB CDS Control Panel*, which features an *online help* resource. For more information, please contact your Agilent representative.

4 Configure Secure Workstation for OpenLAB CDS ChemStation Edition

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This chapter describes the configuration of Secure Workstation for OpenLAB CDS ChemStation Edition.

Configure Secure Workstation for OpenLAB CDS ChemStation Edition

During the installation, the Data Store server is automatically activated with internal authentication and a default user 'admin' will be created with password 'openlab'. For security and compliance reasons, on first login the system will require the user to change the password before proceeding any further.

1 Start the OpenLAB **Control Panel** shortcut on the desktop or go to **Start > All Programs > Agilent Technologies > OpenLAB > OpenLAB Control Panel**.

2 Enter your login credentials for OpenLAB Control Panel.

   a In the **Login** field enter the user name `admin`.

   b In the **Password** field enter the password `openlab`.

3 Enter a new password.

4 Select **OK**.

By default, the authentication provider is set to **Internal**, and the storage type to **Data Store**.

5 Secure Workstation for OpenLAB CDS ChemStation Edition Licensing

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This chapter describes the licensing of a Secure Workstation for OpenLAB CDS ChemStation Edition.

Install Your License

The basic installation of the data system software is complete.

There is a *60-day Startup License* for this system, and the expiration period starts with your first launch of an application.

To request and download your *final software license*, and add the *license file* to your system, see the *Software License Installation Guide*.

License Features

A license file will contain your software license. This file is installed to the license server of your Secure Workstation for OpenLAB CDS ChemStation Edition. The license file is 'bound' to this server address, and cannot be moved to another server.

Information in the license file defines the number of instruments that may be used concurrently with your system.

Licenses

The following table lists the license features in Secure Workstation for OpenLAB CDS ChemStation Edition.

Table 3 Licenses

Description	License Feature(s) in Secure Workstation for OpenLAB CDS ChemStation Edition
OpenLAB CDS ChemStation Workstation	1 x AgilentOpenLABCDSChemStation
OpenLAB Shared Services Server	1 x AgilentOpenLABSharedServices
OpenLAB Data Store	1 x AgilentOpenLABDataStoreServer
OpenLAB CDS Instrument Data Store Licenses	2 x AgilentInstrumentDataStore

NOTE

For instrument control and data acquisition additional licences and add-ons are required:

- OpenLAB CDS Instrument Driver licenses (e.g. OpenLAB CDS Instrument Driver for Agilent LC)
- OpenLAB CDS Add-ons (e.g. OpenLAB CDS 3D UV (PDA) Add-on for spectral data analysis, OpenLAB CDS CS LC 3D MS SQ Add-on for acquisition and analysis of MS data)

Obtain your Software License Online

The most efficient way to and manage and maintain your license is through the Internet.

Flexera License Manager

Secure Workstation for OpenLAB CDS ChemStation Edition uses a 3rd party tool called FlexNet Producer Suite from Flexera to manage the licenses. The required Licensing server components are installed by default on the Secure Workstation for OpenLAB CDS ChemStation Edition.

License Management in OpenLAB Shared Services requires an additional Windows service to be running. This Windows service is called Agilent OpenLAB License Server. This service must be running on your Secure Workstation for OpenLAB CDS ChemStation Edition.

If you are lacking an Internet connection, see the *Software License Installation Guide* for more information. Gather the following information from the lavender envelope containing your Software Entitlement Certificate:

- The authorization code label
- The URL for SubscribeNet

If you have not received a lavender envelope, contact your vendor or internal support.

Create a SubscribeNet Account (New Users only)

If you are a new user who has not registered with SubscribeNet, you must first create an account. If you are already registered with SubscribeNet, skip to the section **Generate your License**.

Add your License to the Control Panel

For your system to be fully operational, you must add your license to the Control Panel.

To add license

1. Start the Control Panel on your Secure Workstation for OpenLAB CDS ChemStation Edition.
2. From the navigation pane, select **Administration > Licenses**.
3. In the Licensing toolbar, select **Add**.
4. In the Add Licenses dialog box.
5. Select **Browse**.
6. In the Open dialog box, navigate to and select the license file (on CD, USB, or network folder).
7. Select **Open**.

6
User Management

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This chapter contains instructions for the user management.

Add Users

1 From the navigation pane, select **Administration > Users**.

2 In the Users toolbar, select **Create**.

3 In the Create User dialog box enter a **Name** and **Description** for the user.

4 Select the **General** tab and enter a Password for the user. Confirm the password.

5 Under **Security policy**, set the minimum password length of at least five characters.

6 Set the expiration period of 180 days or less.

7 Limit the number of allowed login attempts to three.

8 Enter the user's full name, email address, and contact information if desired. The full name is used in activity log entries and the welcome message at the lower right of the Control Panel.

9 Select password options:

- To prevent the user from changing the password assigned here, enable the **User cannot change password**.
- To require the user to create a new password the next time they log on, enable the **User must change password at next logon**.
- To allow the user to use the password assigned here or change it at any time, disable both the **User cannot change password** and the **User must change password at next logon**.

10 To create a user profile but prevent the user from logging on Control Panel, enable **User disabled**.

11 Select **OK**.

Add Users to a Role

1 From the navigation pane, select **Administration > Roles**.

2 In the roles window, select the role you want to assign to users.

3 In the roles toolbar, select **Edit**.

4 In the **Edit Role** dialog box, select the **Members** tab.

5 Select **Add user or group**.

6 In the Search Users and Groups dialog box, select **Search** to view a list of all users and groups.

7 Under **Search Results**, select a user or group and select **Add**.

8 Select **OK**.

7
Optional Procedures

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This chapter includes information on the Software Verification Tool and on the upgrade of Secure Workstation for OpenLAB CDS ChemStation Edition.

Run an Software Verification after Software Installation

The Software Verification Tool provides documentary evidence that your system has been built and installed correctly, and that all design specifications have been met.

1 Using your Windows operating system, go to **Start > All Programs > Agilent Technologies > Software Verification Tool**.

2 Select **Qualify**.

The system will run the application and generate a Software Verification Report.

3 If the report indicates failure, verify the computer requirements and reinstall the data system.

Do not use the system until the Software Verification Report gives a 'pass' result.

Upgrade a Secure Workstation

Upgrading From A.02.01

You can upgrade to OpenLAB CDS A.02.02 in one step, using the **OpenLAB CDS Upgrade Wizard** in the Master Installer

NOTE The settings in the **ChemStation Administration Tool** may change during the update process. After the upgrade, check if the settings in the **ChemStation Administration Tool** still match your original system settings before the upgrade.

1 From the Master Installer **Planning** screen, switch to the **Installation** screen.

2 Select **Secure Workstation for OpenLAB CDS ChemStation Edition**.

If OpenLAB CDS is already installed, this automatically opens the OpenLAB CDS Upgrade Wizard.

3 Select **I agree with the terms and conditions**. You cannot proceed with the upgrade unless you agree to these terms. Click **Next**.

4 In the **OpenLAB Shared Services Settings for Registration** screen, enter the username and password of a user with system administration privileges. Click **Next**.

5 In the **PostgreSQL Credentials** screen, enter the password of the postgres user. Click **Next**.

6 In the **Summary** screen of the Upgrade Wizard, the components for the upgrade are listed. Click **Start** to proceed with the upgrade.

If an error occurs during the upgrade, an error message appears.

7 After the upgrade is finished, select **Finish** to close the **OpenLAB CDS Upgrade Wizard**.

Existing instrument configuration can remain unchanged after the upgrade.

NOTE If you reconfigure existing instruments: For *35900 ADC* instruments, do *not* switch from classic drivers to RC.NET drivers. 35900 ADC may no longer write data afterwards.

After an upgrade of a ChemStation, configuration files for every instrument should be deleted.

1. Open the Windows Explorer on the instrument controller (Stand-alone Workstation, Networked Workstation, or AIC).
2. Navigate to the ChemStation installation folder.

   By default, this folder is named C:\Chem32.
3. Make sure all online and offline ChemStation sessions are closed.
4. Go into each of the existing instrument folders (Chem32\1\, Chem32\2\, ...) and delete the files with the names *Config.reg* and *Conf_off.reg*.

   Do not delete any other files.

8
Uninstall the Software

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This chapter contains information on the uninstallation by using the OpenLAB CDS Uninstallation Wizard.

About Uninstallation

NOTE If the Master Installer was not used for installation, any manually installed additional software such as Headspace, PAL, or third party drivers must be uninstalled using the Windows Control Panel before the OpenLAB CDS can be uninstalled.

Like the installation, the uninstallation of OpenLAB CDS is automated by the OpenLAB CDS Master Installer.

For your convenience, the Master Installer uses the same user interfaces for the software uninstallation of all OpenLAB CDS configurations (standalone or networked workstation). The **OpenLAB CDS Uninstallation Wizard** under the **Maintenance** section of the Master Installer guides you through the uninstallation steps.

NOTE Do not use the Windows uninstallation tool for uninstalling OpenLAB CDS.

Run the Master Installer

To run the Master Installer on your workstation choose one of the following approaches:

- To run the uninstallation from disk, insert the OpenLAB CDS Installation disk (Disk 1).

  Autostart will automatically run Agilent.OpenLABCDSSetupFromDVD.exe and display the installer **Planning** screen.

- For the *portable data storage device* approach, insert the device in a computer USB port, navigate to \Disk1 and run Setup.bat to proceed to the **Planning** screen.

- For the *share file* approach, copy the contents to the local drive and navigate to the respective share file folder. Then navigate to \Disk1 and run Setup.bat to proceed to the **Planning** screen.

Run the OpenLAB CDS Uninstallation Wizard

1. From the Master Installer **Planning** screen, select **Maintenance** from the side bar menu.
2. Select **OpenLAB CDS Uninstallation.**

   The **OpenLAB CDS Uninstallation Wizard** opens.
3. In the **Shared Components** screen, check the **Uninstall Software Verification** check box.

   Note: Software Verification Tool needs to be uninstalled if you wish to re-install OpenLAB CDS at a later time
4. In the **Summary** screen under **Uninstallation of OpenLAB CDS Components**, there is a list of the components you want to uninstall.
5. Select **Start** to start the uninstallation.

   If you want to abort the uninstallation, select **Cancel**. If you want to change any settings, select **Back**.

   All listed components are automatically uninstalled, one after another.
6. When the uninstallation has finished, click **Finish** to close the uninstallation wizard.

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In This Book

This installation guide is designed to help system administrators install the Agilent Secure Workstation for OpenLAB CDS ChemStation Edition quickly and correctly.

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