



OpenLab CDS

Configuring OpenLab CDS with OpenLab ECM

Notices

Document Information

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Software Revision

This guide is valid for revision 2.6 of Agilent OpenLab CDS.

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In this Guide ...

Since OpenLab CDS 2.4 or higher Agilent OpenLab ECM (v3.5 Update 6, v3.6 and above) can be used as an alternative storage to OpenLab Server or OpenLab ECM XT. In this configuration, you can view, import and reprocess data stored in ECM that has been generated by CDS 2.4 or higher, by OpenLab ChemStation or EZChrom.

This manual describes the requirements, installation, and configuration of a Shared Services server for configuration of OpenLab CDS 2.6 in an environment with existing OpenLab ECM 3.x.

It is valid for OpenLab CDS 2.6 with OpenLab ECM 3.5 Update 6 or higher, or ECM 3.6. The document includes information on OpenLab CDS interoperability with other Agilent Chromatography Data Systems (ChemStation or EZChrom).

Table 1 Terms and abbreviations used in this document

Term	Description
AIC	Agilent's Analytical Instrument Controller
Control Panel	Control Panel for Agilent OpenLab software
Microsoft Control Panel	Part of the Microsoft Windows operating system
ECM	OpenLab Enterprise Content Management system
Shared Services	Set of administrative services that control, for example, the security policy and the central configuration of OpenLab CDS. Shared Services are accessed via the Control Panel.

1 Compatibility and Requirements

This chapter details on compatibility with ECM, and Server requirements.

2 Install the Shared Services Server

This chapter gives an overview of the installation with different deployment options, and provides step-by-step instructions for the installation of the Shared Services server software.

3 Configure the Shared Services Server

This chapter describes the initial configuration steps after installing the OpenLab Shared Services server software.

4 Working with OpenLab CDS and OpenLab ECM

This chapter contains basic information on working with an Agilent OpenLab CDS system that is connected to OpenLab ECM.

5 Maintenance of the Shared Services Server

This chapter contains information on specific backup and restore procedures.

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This chapter details on compatibility with ECM, and Server requirements.

Compatibility of OpenLab CDS 2.6 with OpenLab ECM

CDS 2.6 is compatible with

- OpenLab ECM 3.6¹, and
- OpenLab ECM 3.5 Update 6.

NOTE

OpenLab CDS has an enhanced search functionality that gets exposed when it is used with OpenLab ECM 3.6 *Update 02* or above. In this case search will find OpenLab CDS results by looking at all extracted meta-data keys. It will also find data generated by ChemStation or EZChrom systems based on extracted keys.

For more detail on search see [“Working with Existing ChemStation or EZChrom Data”](#) on page 66.

¹ Compatibility update from June 2020 required to run on Windows Server 2019, SQL Server 2019, and Oracle 18c or 19c

Shared Services Server Requirements

OpenLab CDS 2.6 requires the latest version of OpenLab Shared Services Server, v3.5, as delivered on the CDS media.

Agilent does not recommend mixing OpenLab Shared Services and OpenLab ECM 3.x on the same server in a production environment. Rather install OpenLab Shared Services on a separate server hardware. If you are using ECM 3.5 with a database server, you may deploy the Shared services server database on the same database server.

Minimum Recommended Hardware

Table 2 Minimum hardware requirements for a Shared Services Server

Item	HW requirements
Processor speed (CPU)	3 GHz Dual core
Physical memory (RAM)	12 GB (64-bit)
Hard disc	160 GB
Network	100/1000 mbps

To prevent OpenLab CDS licensing issues when using client application virtualization software, disable the (default) dynamic MAC Address. The product licensing is based on the Mac address of the server. A change of Mac Address, will break licensing and the application won't be functional.

Operating System support

Supported Operating Systems with ECM 3.6

- Windows Server 2016, Standard or Datacenter
- Windows Server 2019, Standard or Datacenter

Supported Operating Systems with ECM 3.5 upgrade 6

- Windows 2012 Server R2 (64 bit)

Database Support

Supported database software

- Microsoft SQL Server 2014 (64-bit) SP3
- Microsoft SQL Server 2016 (64-bit) SP2
- Microsoft SQL Server 2017 (64-bit)
- Microsoft SQL Server 2019 (64-bit)
- PostgreSQL Server 11.5 (64-bit)
- Oracle 18c
- Oracle 19c

Citric Client

In case your are using a Citrix Client you will need to publish the Control Panel and the Agilent.ECMAPI.ECMAPI32BitHost.exe from the path C:\Program Files (x86)\Agilent Technologies\ECM API\2.2.0.0 (ECM 3.6 backend), or C:\Program Files (x86)\Agilent Technologies\ECM API\2.1.3.0 (ECM 3.5 update 06) respectively. By default the name of the application is used. Dots are not supported in the name! Remove any "." before publishing, and publish e.g. as AgilentECMAPIECMAPI32BitHost.exe.

Click on the published application Agilent.ECMAPI.ECMAPI32BitHost.exe through Citrix receiver, then log on to the OpenLab Control Panel.

NOTE

Use a dedicated Citrix server for each OpenLab CDS system if there are multiple systems.

If the following error occurs when users switch between servers: *"ECM error message: Failed to retrieve the username and password from the configuration table...Error code: -8 "*, and data fails to load: Check if you have a single Citrix server for multiple systems, and if so, change to dedicated servers.

2

Install the Shared Services Server

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This chapter gives an overview of the installation with different deployment options, and provides step-by-step instructions for the installation of the Shared Services server software.

Installation Overview

There are different approaches how you can add a OpenLab CDS system to an existing OpenLab ECM solution. The starting point is your existing installation.

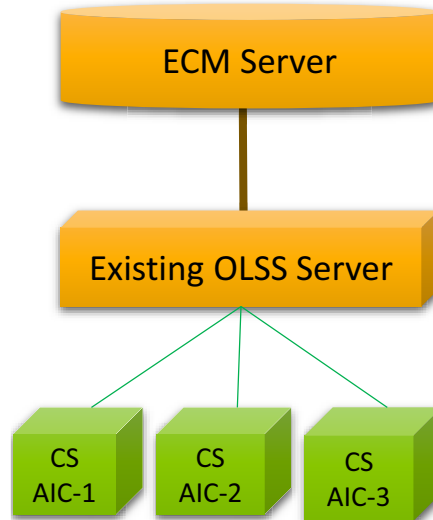


Figure 1 Existing Installation (Example)

The initial step is to make sure that your OpenLab ECM server is of a compatible version, and if not, upgrade the ECM server. OpenLab CDS 2.6 requires OpenLab ECM version 3.5 Update 6, or OpenLab ECM version 3.6 or above.

The next step is to deploy the Shared Services server. The Shared Services Server must match with the client version. Choose one of the following options:

- ["Option 1: Deploy a new Shared Services Server"](#) on page 11
- ["Option 2: In-place Upgrade of an Existing Shared Services Server"](#) on page 12

NOTE

If you already have an OpenLab Shared Services Server that is used with another application, you may be able to share the server with OpenLab CDS 2.6 (see ["Option 2: In-place Upgrade of an Existing Shared Services Server"](#) on page 12). However, this option can be used only if the other application is compatible with OpenLab Shared Services Server version 3.5. Otherwise choose Option 1 (see ["Option 1: Deploy a new Shared Services Server"](#) on page 11).

Option 1: Deploy a new Shared Services Server

This is the preferred option.

Deploy a second Shared Services server for connecting the new OpenLab CDS 2.6 AICs. This approach does require additional hardware for the new Shared Services server. There is no direct dependency between the two Shared Services servers. They can have different versions as long as they are compatible with the ECM 3.x server and with the CDS clients or AICs connected to them.

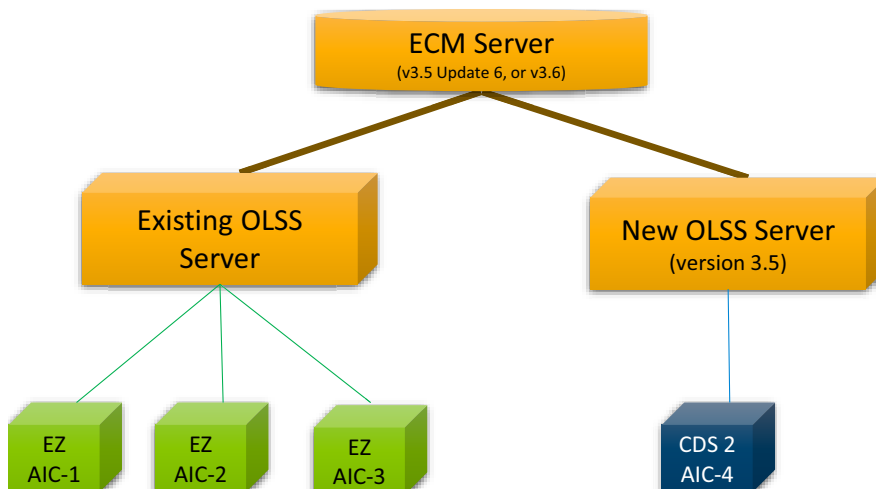


Figure 2 Deployment with second Shared Services Server

Benefits of this approach are:

- The existing system is not modified.
 - Little to no downtime for existing systems
 - Little to no revalidation costs for existing systems
- The new system can be evaluated, tested and validated while existing production remains undisturbed.
- Retiring ChemStation or EZChrom AICs and migrating instruments to OpenLab CDS can be done one at a time and over an extended period.

Two Shared Services servers will need to be managed until all AICs are migrated to the new server, and the old server can be retired.

Option 2: In-place Upgrade of an Existing Shared Services Server

With this approach, you connect the new OpenLab CDS AICs to your existing Shared Services server.

NOTE

This is possible only when all involved parties - OpenLab CDS, ChemStation, and/or EZChrom - are compatible with the "shared" Shared Service server. Check the requirement information of your CDS before you start with the in-place upgrade.

This option is the more complex one, if your existing Shared Services server is not already compatible with OpenLab CDS.

Consequences can include one or several of the following:

- Higher downtime for upgrading the Shared Services server,
- May require upgrading existing AICs and clients,
- Higher upfront revalidation costs.

The benefits of this approach are:

- No additional hardware required,
- Need to manage only one Shared Services Server.

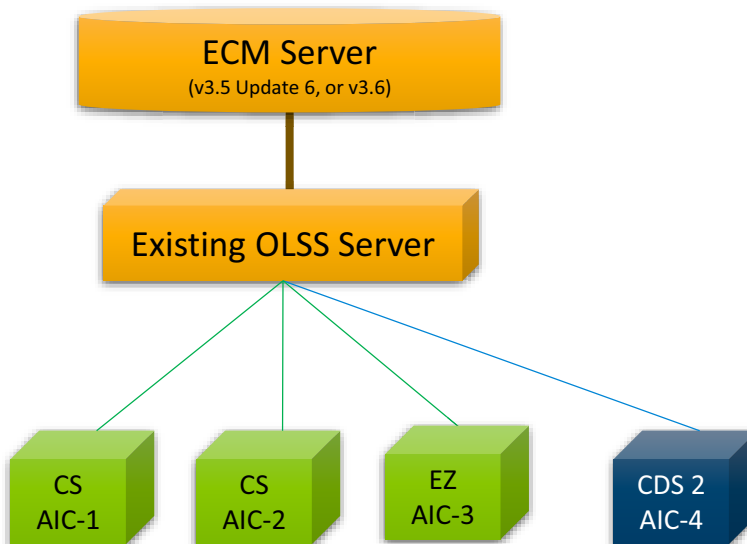


Figure 3 In-place upgrade

The upgrade process includes the following actions:

- Check the version of your existing Shared Services server.
- If the Shared Services version is lower than 3.5:
 - a** Check your existing ChemStation or EZChrom system, and determine the required version. Note: At the time of MR of OpenLab CDS version 2.6 the latest versions of OpenLab ChemStation and OpenLab EZChrom are not compatible with the Shared Services server version 3.5.
 - b** Upgrade the Shared Services server by following the steps as outlined in [“Install or Upgrade the Shared Services server software”](#) on page 25.
 - c** Upgrade your existing AICs and clients to a compatible version.
 - d** Add your new OpenLab CDS Client or AIC
 - e** After adding OpenLab CDS AIC or Client, reset the authentication in the OpenLab Control Panel such that the storage path is provided to specify Location\Cabinet\.
 - For details, see [“Configure Project Paths”](#) on page 61.
 - f** Rebuild the *Activity Log Index* as described at [“Rebuild the Activity Log Index”](#) on page 47
- OR
- If you already use version 3.5 or higher of the Shared Services server:
 - a** Skip the steps from the *Install or Upgrade the Shared Services server software* section. You only need to reconfigure the project paths in the Control Panel.
 - For details, see [“Configure Project Paths”](#) on page 61.
 - b** After adding OpenLab CDS AIC or Client, reset the authentication in the OpenLab Control Panel such that the storage path details are provided to specify Location\Cabinet\.

Before You Begin

Review the hardware and software requirements

To confirm that you have the correct hardware and software to support your chosen system, review the section [“Compatibility and Requirements”](#) on page 6.

Decide on the server that you would like to use

You may use an existing SQL or Oracle database setup for hosting the Shared Services Server. Agilent recommends to use your existing database engine for ECM. Alternatively you can host the Shared Services Server Schema in PostgreSQL.

If you decide to install a new database, consider the following: The OpenLab Shared Services Server can work with three database types: SQL Server, Oracle or PostgreSQL (see [“Database Support”](#) on page 8).

- **PostgreSQL Server:** The PostgreSQL server can either be local to the OpenLab Shared Services server or it may be on a remote system. This database is provided with the OpenLab software and can be installed and configured during installation. Alternatively you can configure an existing PostgreSQL server previously installed by the OpenLab software. Any PostgreSQL server that you have installed outside of OpenLab must be removed before installing the provided OpenLab PostgreSQL Server.
- **Oracle Server:** This database can be configured during installation, but it must be installed prior to installation of the OpenLab software. See [“Prepare Your Oracle Server”](#) on page 18.
- **Microsoft SQL Server:** This database can be configured during installation, but it must be installed prior to installation of the OpenLab software. See [“Prepare Your Microsoft SQL Server”](#) on page 18.

Acquire administrator privileges

- 1 Obtain the server name. You will need to enter this information during the installation. The software will not install to a server that uses an underscore character in its name.
- 2 Obtain the server administrator credentials. You will need to enter this information during the installation.
- 3 Acquire administrator privileges for the Shared Services server and all computers that you will use in your system.

Upgrade Preparation

If upgrading on systems with a large number of Shared Services activity log records (for example, more than 30 million records), the upgrade and migration of the database can take up two hours or more, based on the database type. Plan accordingly for these larger upgrades.

Make sure the user is specified in the section **Local Security Policy > User Rights Management > Log on as a Service**.

If upgrading the software, all uploads from the client must be stopped, and the **File Upload Queue** on the client must be empty before upgrading.

Set up your Server

- 1 Disconnect the server from the Internet until you have installed the latest security fixes and virus protection.
- 2 Install and configure your server operating system. See your Windows user information for details.
 - Set the Security Settings > Local Policies > Security Options > Network Access: Sharing and security module for local accounts to allow **Classic - local users authenticate as themselves**.

- Set region and language options: On the Administrative tab:
 - Select **Change system locale....**
 - From the drop down list, select **English (United States)**.
 - Set the time zone.
 - Set the authentication mode to **Windows domain and internal authentication**.
- 3** Install an anti-virus program. OpenLab Shared Services was tested to run with Symantec's Norton AntiVirus, McAfee, and Trend Micro™.
- 4** Configure your anti-virus software:
- Exclude the following folders from Antivirus scan, by adding to **Approved programs**. If you want to have these folders scanned, you should do this while the system is not acquiring or doing data Analysis as scanning may cause slowness and runs to be aborted due to concurrent access to the same file by the anti-virus program and the CDS application.
- [C:\]CDSProjects
 - [C:\]Program Files (x86)\Agilent Technologies
 - [C:\]ProgramData\Agilent
 - [C:\]ProgramData\Agilent IPB Files
 - [C:\]ProgramData\Agilent Technologies
 - [C:\]ProgramData\ChromatographySystem
 - [C:\]ProgramData\Firebird
 - [C:\]ProgramData\IsolatedStorage

If you use Trend Micro™ as your anti-virus software, the following tasks are recommended to optimize system performance.

Settings for Trend Micro™ Antivirus Software

- Pre-installation task

If your version of Trend Micro has **Web Reputation**, turn it off to maximize performance.

The risk of turning off Web Reputation is that web traffic through browsing from the machine will not be checked. Ensure that there is another URL/web scanner on the gateway level to protect the endpoint, or ensure that the endpoints have limited access to Internet.

- Post-installation tasks

- Real time scan:** Add exclusions, and modify the scan direction from **Created/Modified/Retrieved** to **Created/Modified**.

Exclusions ensure that the working directory will not be scanned. The risk is that only files that are created and changed on this machine are scanned. Files that are only accessed will be bypassed. Dormant files that were infected without being noticed at the time they were created or written to the machine will not be scanned. Increase the scheduled scan to run daily to ensure all files on the machine are checked for infections that are dormant or not moving.

- Behavior Monitoring:** Add the following list of programs to **Approved programs**.

C:\Program Files (x86)\Agilent Technologies\...

- OpenLab Services\UI\Agilent.OpenLab.ControlPanel.exe
- OpenLab Services\Automation\AutomationServerHost.exe
- OpenLab Services\Diagnostics\DiagnosticsToolsServiceHost.exe
- OpenLab Services\Licensing\Flexera\ladmin.exe
- OpenLab Services\Licensing\Licensing.Service.Host.exe
- OpenLab Services\Server\SharedServicesHost.exe

The risk is that if any of the excluded files get infected, it will not be detected. Trigger a schedule on a daily basis to cover these files.

- Realtime monitoring:** Add the following folder to the exclusion list of Realtime Monitoring settings: C:\Program Files (x86)\Agilent Technologies
- Confirm that no server role or feature is installed.**

- 5 Join an existing domain.

Changing the server domain after the installation requires direct consultation with Agilent Support.

- 6 If you decided for using a PostgreSQL database continue with “[System Preparation](#)” on page 19.

If you decided to install a Oracle Server or Microsoft SQL database follow the respective instructions provided below, before continuing with the System Preparation.

Prepare Your Microsoft SQL Server

If you plan to use a Microsoft SQL server as your Shared Services Server, complete these procedures before installing the OpenLab software. See your Microsoft documentation for details on your SQL server software.

- 1 Install the Microsoft SQL server.
- 2 During installation, change the server authentication to mixed mode.
- 3 Enable the login for user sa.
- 4 Restart the SQL Server service, and log in with SQL Server Authentication.

Prepare Your Oracle Server

If you plan to use an Oracle server database, complete these procedures before installing the OpenLab software. The Database must be installed and configured before installing the OpenLab software.

- 1 Before the installation:

Ensure you have ECM 3.6 with the June 2020 compatibility release, if you want to use Oracle 18c, or 19c.
- 2 During the installation (Note: Do *not* select **Create as Container Database!**):
 - a Configure Oracle with the *AL32UTF8* database character set.
 - b Set the password for the SYS & SYSTEM users.
- 3 Change the server configuration. Unlock the CTXSYS account used for text indexing, and provide a password

Configure your Oracle Server for hot backup

Use this procedure to prepare an Oracle server database for running a hot backup. This procedure is only required once. For more detail on the individual steps see the *OpenLab Server and OpenLab ECM XT Installation Guide*.

Execute this procedure only when no database activities are running.

- 1 Create a folder for the fast recovery area,
- 2 Configure the fast recovery area,
- 3 Set the database to ARCHIVELOG mode,
- 4 Set retention policy.

System Preparation

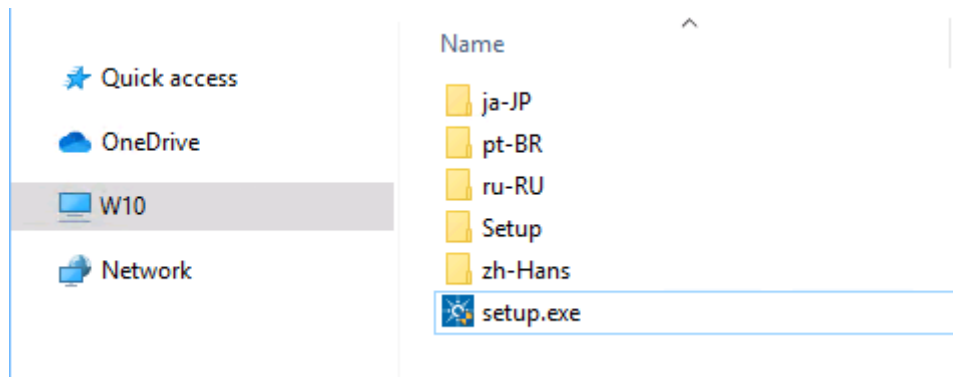
In this step you configure the operating system. The majority of the steps are automated by a System Preparation Tool (SPT). Applying these settings helps avoid issues during installation and use of the product.

The System Preparation Tool (SPT) checks and applies Windows settings on your machine. The settings are also applied automatically when you run the OpenLab installer. Running the SPT in advance helps you to shorten the installation process and gives you an overview of both mandatory and recommended settings.

- 1 If you want to keep your setting in the System Preparation Tool from one run to the next: Copy the entire content of the USB media to a local drive or centralized folder, then remove the USB media from the PC.
- 2 To open the installer, right-click the setup.exe file, and run it as administrator.

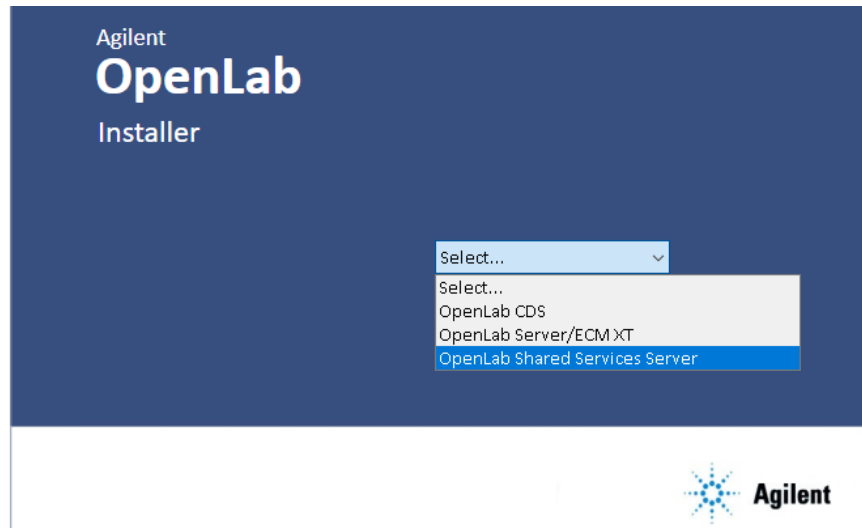
NOTE

If User Account Control (UAC) is switched on, this step requires active confirmation to continue.

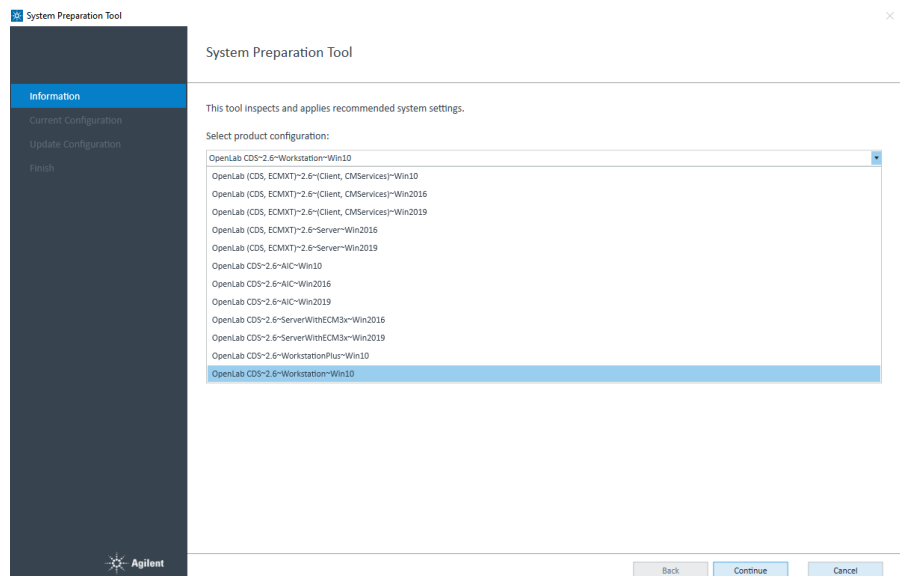


Install the Shared Services Server Before You Begin

- On the start screen, select **OpenLab Shared Services Server**, and click **OK** to install a server which is to be connected to an existing ECM system.



- From the **Planning** tab, select **System Preparation Tool**.
- Select the product configuration OpenLab CDS~2.6~ServerWithECM3x~Win2016 or OpenLab CDS~2.6~ServerWithECM3x~Win2019 from the drop-down list, and click **Continue**.



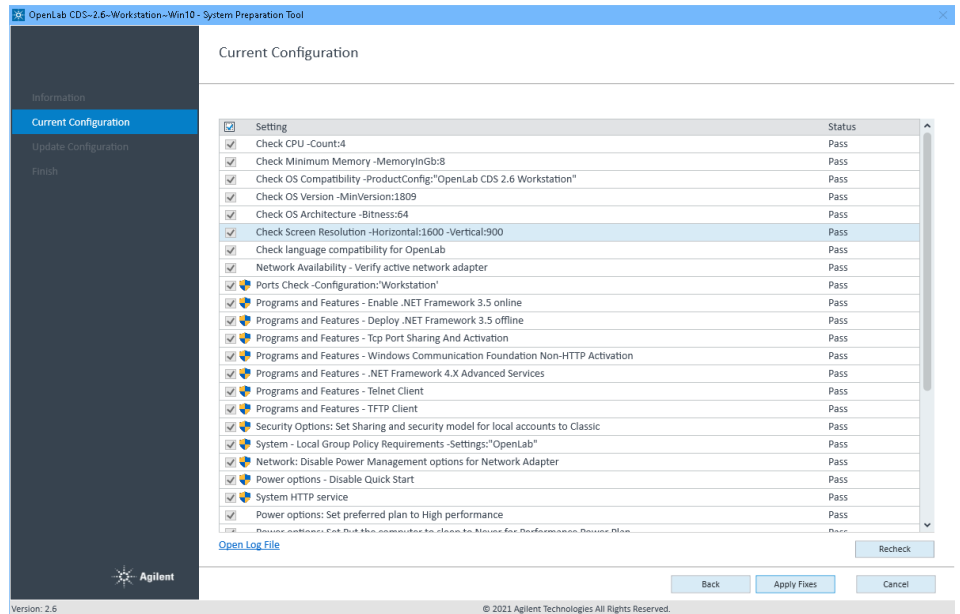
The tool checks all settings, and displays the current status (**Pass** or **Fail**) on the **Current Configuration** page.

6 Select which recommended settings to apply to the system.

There are several settings that are recommended that can improve the performance and stability of your system, but do not need to be completed to deploy the application. The recommended settings are listed after the mandatory settings.

You can clear the check boxes for recommended settings. Mandatory settings cannot be cleared. Recommended actions are selected by default and will be applied unless they are cleared.

For more information on mandatory and recommended settings, see [Table 3](#) on page 23.



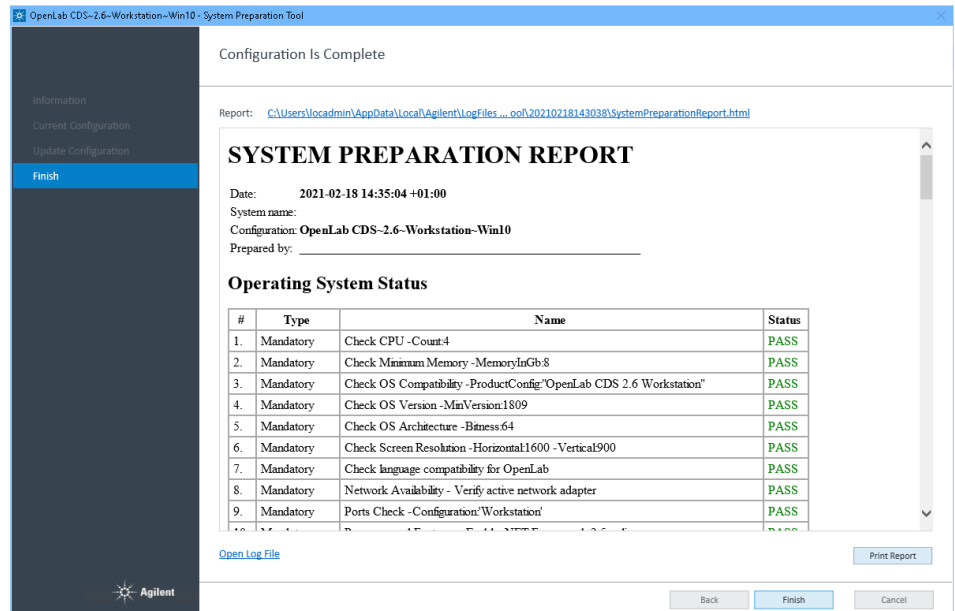
7 Click **Apply Fixes** to apply the correct settings.

The System Preparation Tool attempts to fix the selected settings and displays the new status on the **Update Configuration** page. All actions are saved to a log file.

8 Click **Next** to proceed to the **System Preparation Report** page.

The System Preparation Report is displayed. It lists the new status for all selected settings.

The System Preparation Report for each run is saved separately to disk. Its location is shown at the top of the page.



- 9 Click **Print Report** to print the *System Preparation Report*.
 You may print to a file, for example, using the *Adobe PDF* printer, and add comments.
- 10 The System Preparation Report lists any mandatory or recommended settings that are not automatically updated by the System Preparation Tool. Follow the instructions provided in the System Preparation report to manually update operating system settings.
- 11 Click **Finish**.
- 12 Reboot your system if requested to do so.

Reference of SPT Checks

Table 3 Checks and Setting updates by the System Preparation Tool

Name	Workstation Workstation Plus	Client CM Services	OpenLab Server ECM XT OLSS Server for ECM 3.x	AIC
Mandatory				
Check Minimum Memory	●	●	●	●
Check CPU	●	●	●	●
Check OS Compatibility	●	●	●	●
Check OS Version	●			
Check OS Architecture (64 bit)	●			
Check Screen Resolution	●	●	●	●
Check language compatibility for OpenLab	●	●	●	●
Network Availability - Verify active network adapter	●	●	●	●
Ports Check	●	●	●	●
Programs and Features - Enable/deploy .NET Framework 3.5	●	●	●	●
Programs and Features - Tcp Port Sharing And Activation	●	●	●	●
Programs and Features - Windows Communication Foundation Non-HTTP Activation	●	●	●	●
Programs and Features - .NET Framework 4.X Advanced Services	●			
Programs and Features - Telnet Client	●	●		●
Programs and Features - TFTP Client	●	●		●
System - Local Group Policy Requirements ¹	●	●	●	●
Power options - Disable Quick Start	●	●	●	●
System HTTP service	●	●	●	●

Table 3 Checks and Setting updates by the System Preparation Tool

Name	Workstation Workstation Plus	Client CM Services	OpenLab Server ECM XT OLSS Server for ECM 3.x	AIC
Mandatory, manual				
Windows Update - Apply pending updates	●	●	●	●
Windows Activation	●	●	●	●
System domain membership	●	●	●	●
Region - Change system locale	●	●	●	●
Indexing options: Disable indexing Options for all drivers and locations			●	
Recommended				
System - Startup and Recovery Settings	●	●		●
System - Turn off system protection (restore points) for all drives	●			
Windows Update - Disable Windows Update service	●	●	●	●
Personalization - Disable advertising info	●	●		●
Personalization - Combine Taskbar Buttons	●	●		●
Recommended, manual				
File Explorer - Display Settings	●	●		●
Recycle Bin - Set Recycle Bin properties	●	●		●
System - Performance Settings	●	●		●
Privacy - Set privacy settings	●	●		●
Apps - Default browser	●	●		●
Personalization - Turn off show lockscreen background picture	●	●		●

¹ Local Group Policy Requirements for OpenLab: - Set "Hide entry points for Fast User Switching" to Enabled - Adds "Users" group to "Access this computer from the network" setting

Install or Upgrade the Shared Services server software

CAUTION

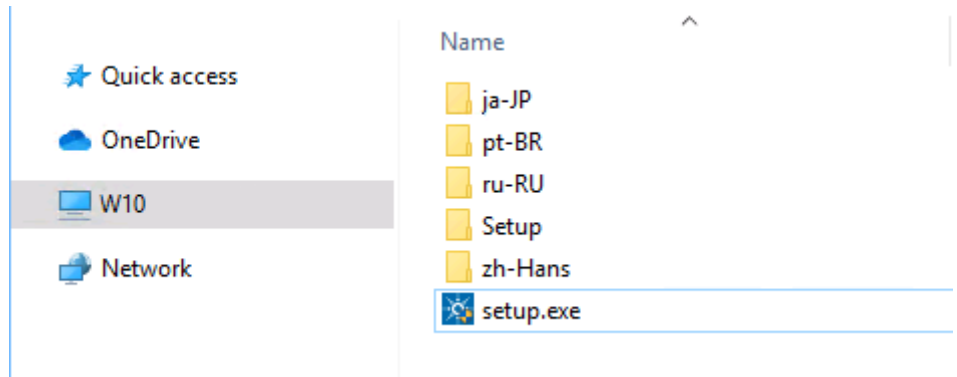
Record and store the selections that you use during this installation in a different physical location.

- ✓ This information is needed to restore your system in the unlikely case of your system becoming inoperable due to a hardware or software failure.

Launch OpenLab installer

Prerequisites

- You have set up your server.
 - You did run the System Preparation tool (see “[System Preparation](#)” on page 19).
- To open the installer, right-click the setup.exe file, and run it as administrator.



NOTE

If User Account Control (UAC) is switched on, this step requires active confirmation to continue.

Install the Shared Services Server

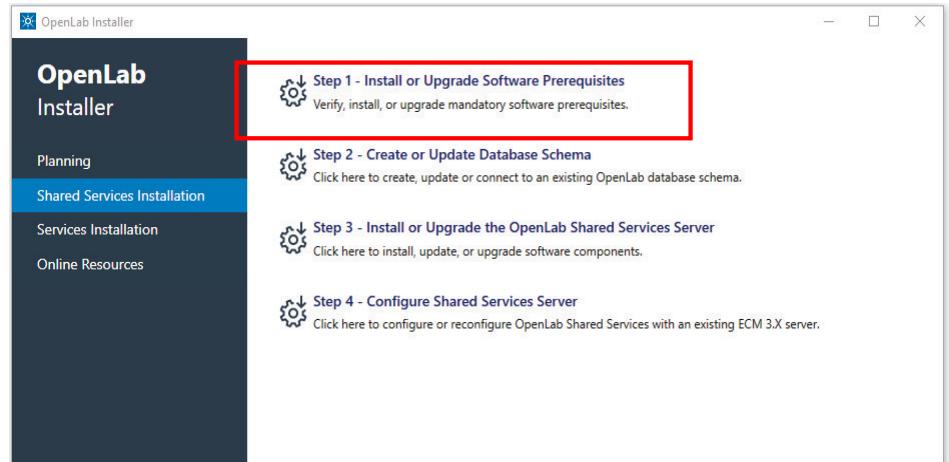
Install or Upgrade the Shared Services server software

- 2 On the start screen, select **OpenLab Shared Services Server**, and click **OK** to install a server which is to be connected to an existing ECM system.

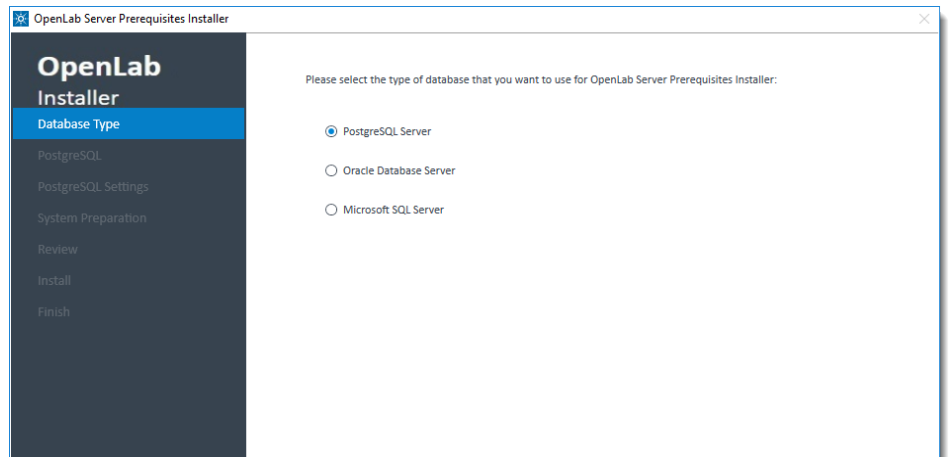


Step 1 - Install or Upgrade Software Prerequisites

- 1 From the **OpenLab Installer** main screen, select the **Shared Services Installation** page.
- 2 Select **Step 1 - Install or Upgrade Software Prerequisites**.



- 3 Select the server database you have decided to use.
If you are upgrading Shared Services Server with PostgreSQL, the database will be updated to version 11.5 after a system upgrade.



If you select Oracle Database Server or Microsoft SQL Server, or if this is an upgrade, continue to step 6 on page 29.

- 4 If this is a new installation, enter the *Server Name* and *Port*, and click **Next**.

If this is an update, this screen is not displayed.

- 5 If this is a new installation, enter the *Installation* and *Database location* paths, create and confirm a superuser password.

NOTE

The PostgreSQL installation path and the database location cannot contain folder names that start with the letters "t", "r", or "n". For example, a PostgreSQL installation path "C:\Program Files (x86)\test\Agilent Technologies" or a PostgreSQL database location "C:\Program Files (x86)\test\PostgreSQL-11-OLCM" are not allowed.

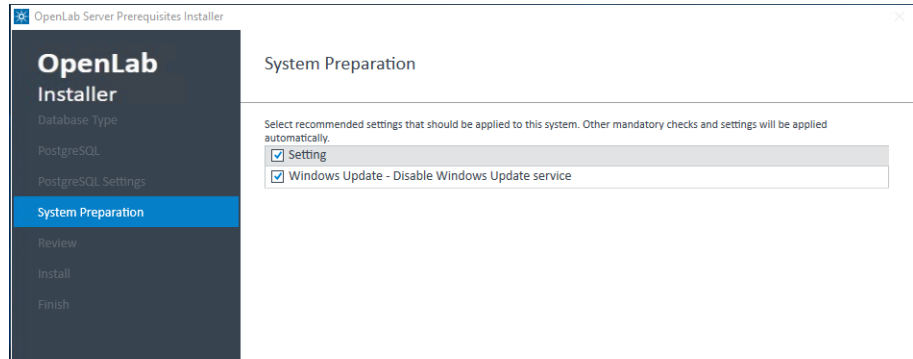
If this is an upgrade, this screen is not displayed.

- 6 Continue with **Next**.

The **System Preparation** window opens.

- 7 **System Preparation:** Recommended setting is shown. When this check box is selected, the setting is applied.

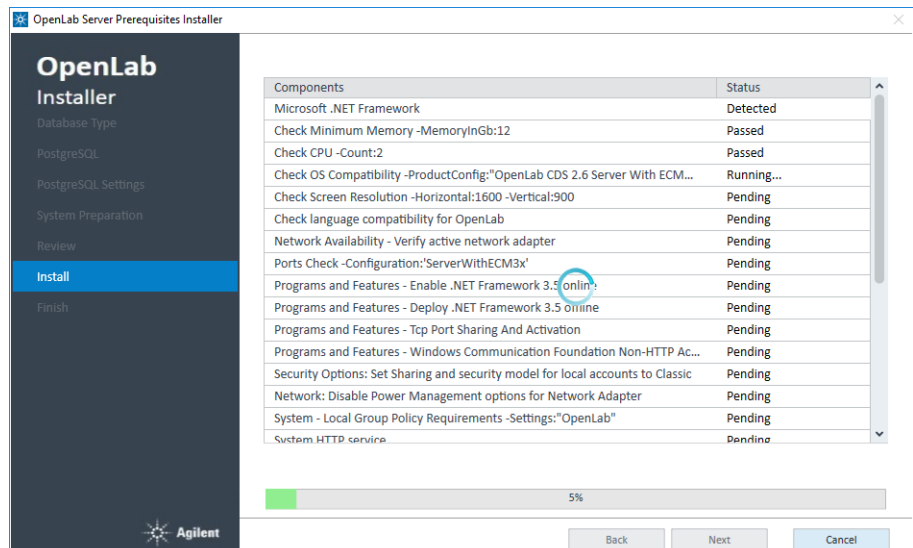
To review the mandatory settings, run the System Preparation Tool separately. For details, see “[System Preparation](#)” on page 19.



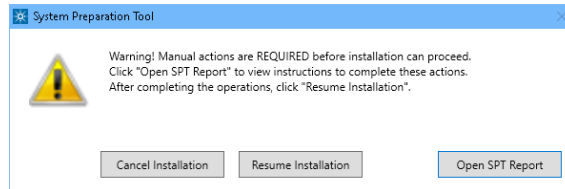
Click **Next** to continue.

- 8 The **Review** tab displays installed and new versions of the affected components. The items listed here will depend on the server you will be using. Click **Install**.

The components will be installed, and the status of the components will be displayed as *Installed*.



- 9 If there are still manual actions required before installation, a warning is shown.

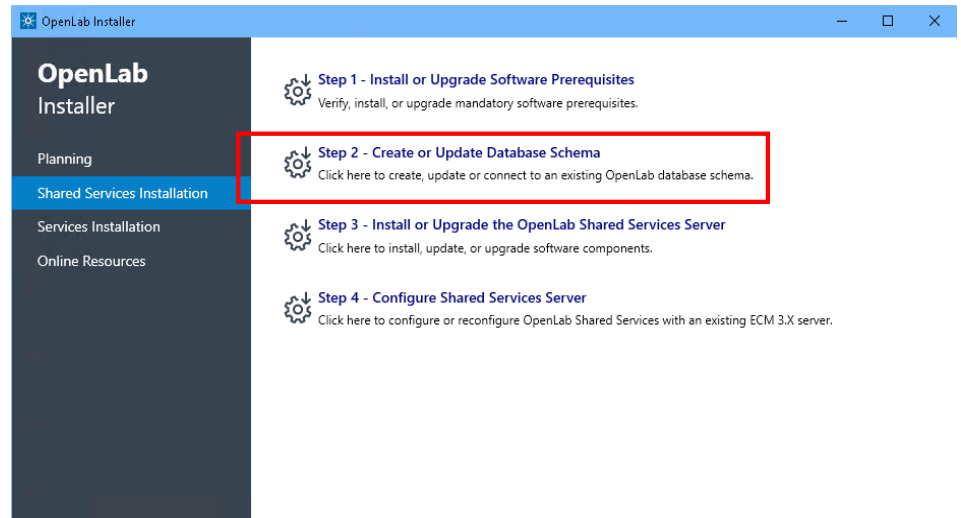


Options to proceed

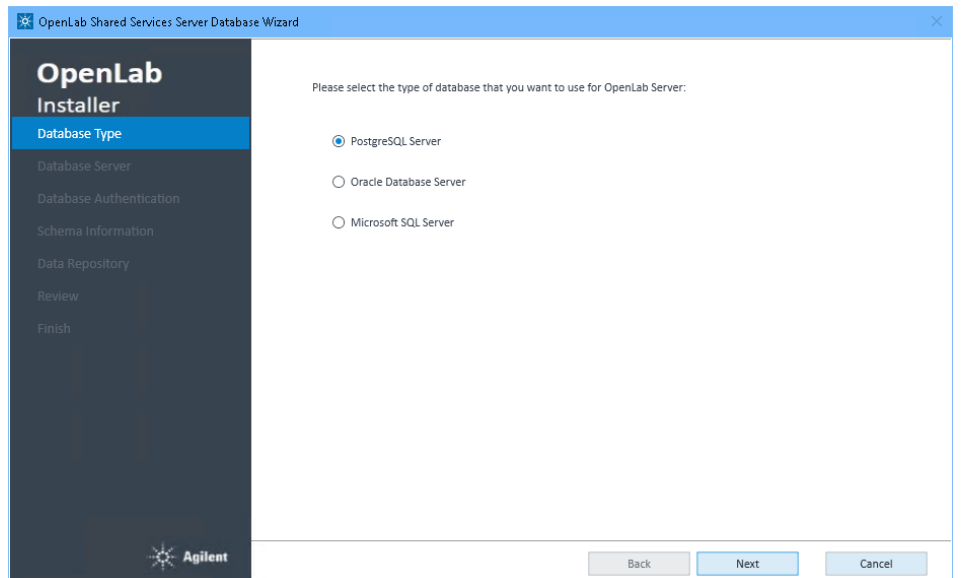
- *Recommended:* Click **Open SPT Report** to view instructions to complete these actions. After completing the operations, click **Resume Installation**.
 - **Cancel Installation:** Installation is aborted. Make necessary updates and restart installation.
 - **Resume Installation:** The dialog is closed, and installation continues with the installation of the CDS components even if a setting was not applied, or the Operating System does not meet requirements.
- 10 Click **Next** to proceed. When the components are successfully installed, you will be provided a success message. Click **Finish** to complete Step 1.
- You can review the System Preparation Report now.

Step 2 - Create or Update your Database Schema

- 1 Select **Step 2 - Create or Update Database Schema**.



- 2 Select the server that you have decided to use for your database. By default, the database you chose in “[Step 1 - Install or Upgrade Software Prerequisites](#)” on page 27 will be selected. Click **Next**.



3 On the **Database Server** page:

- For a PostgreSQL server:

Provide *Server Name* and *Port*.

The screenshot shows the 'OpenLab Shared Services Server Database Wizard' window. On the left is a sidebar with the 'OpenLab Installer' logo and a list of steps: Database Type, Database Server (highlighted), Database Authentication, Schema Information, Data Repository, Review, and Finish. The main panel is titled 'Please provide the server name or IP location for the PostgreSQL Server.' It contains two input fields: 'Server Name' with the value 'localhost' and 'Port' with the value '5432'. Below these fields, it asks 'Are you creating a new database for OpenLab Server or connecting to an existing one?' with two radio button options. The first option, 'Create a new database for OpenLab Server', is selected. A note below it states: 'Use this option if you want the installer to automatically create the database. Note: this option requires database administrator username and password.' The second option is 'Connect to and upgrade existing database for OpenLab Server', with a note: 'If you have already created database schema using the provided SQL scripts, then you should connect to them.'

- For an Oracle server:

Enter the *Host Name*, *Port*, and *SID or Service name*.

The screenshot shows the 'OpenLab Shared Services Server Database Wizard' window for Oracle configuration. The sidebar is identical to the previous screenshot. The main panel is titled 'Please provide the database server information.' It contains three input fields: 'Host Name' with the value 'ORA-2-5', 'Port' with the value '1521', and 'SID or Service name' with the value 'OPENLAB.OL2016.local'. Below these fields, it asks 'Are you creating a new database for OpenLab Server or connecting to an existing one?' with two radio button options. The first option, 'Create a new database for OpenLab Server', is selected. A note below it states: 'Use this option if you want the installer to automatically create the database. Note: this option requires database administrator username and password.' The second option is 'Connect to and upgrade existing database for OpenLab Server', with a note: 'If you have already created database schema using the provided SQL scripts, then you should connect to them.'

- For Microsoft SQL Server:
Enter the server name, and select either **Connect to Default Instance** or **Connect to Named Instance** and provide the information.

NOTE

The OpenLab software will not install to a server that uses an underscore character in its name.

Select whether you are creating a new database or are connecting to an existing one, and click **Next**.

4 On the **Database Authentication** page:

- For a PostgreSQL server:

Provide the PostgreSQL Database Superuser credentials. The defaults in this screen are populated according to the server you chose to install.

The screenshot shows the 'OpenLab Shared Services Server Database Wizard' window. The left sidebar contains the following navigation items: OpenLab Installer, Database Type, Database Server, **Database Authentication** (highlighted), Schema Information, Data Repository, Review, and Finish. The main content area is titled 'Please provide PostgreSQL Database Superuser credentials. This information is used to create OpenLab Server Database Schema.' It contains two input fields: 'Super User:' with the value 'postgres' and 'Password:' with masked characters '*****'. Below these fields is a checkbox labeled 'Reset Super User password' which is currently unchecked.

Use **Reset Super User password** only if needed, e.g. in an upgrade scenario.

- For an Oracle server:

Enter the Oracle database administrator credentials.

The screenshot shows the 'OpenLab Shared Services Server Database Wizard' window. The left sidebar contains the following navigation items: OpenLab Installer, Database Type, Database Server, **Database Authentication** (highlighted), Schema Information, Data Repository, Review, and Finish. The main content area is titled 'Please provide database administrator credentials. This information is used to create OpenLab Server Database Schema.' It contains two input fields: 'Super User:' with the value 'SYSTEM' and 'Password:' with masked characters '*****'.

- For Microsoft SQL Server:
Select the authentication mode. If you select **User SQL Server database administrator account (sa)**, complete the **Super User** and **Password** fields.

The screenshot shows the 'OpenLab Shared Services Server Database Wizard' window. On the left is a dark sidebar with the 'OpenLab Installer' logo and a list of steps: Database Type, Database Server, Database Authentication (highlighted in blue), Schema Information, Data Repository, Review, and Finish. The main area has a title bar and a close button. Below the title bar, it says 'Please provide database administrator credentials. This information is used to create OpenLab Server Database Schema'. There are two radio buttons: 'Use Windows Authentication' (unselected) and 'Use SQL Server database administrator account (sa)' (selected). Below the selected option, there are two text input fields: 'Super User:' with the value 'sa' and 'Password:' with a masked value '*****'.

Click **Next**.

- On the **Schema Information** page, provide the database information required to create the OpenLab Shared Services Server database.
 - For a PostgreSQL server:
Create user for the Shared Services Database.

The screenshot shows the 'OpenLab Shared Services Server Database Wizard' window at the 'Schema Information' step. The sidebar on the left is the same as in the previous screenshot, but 'Schema Information' is now highlighted in blue. The main area has a title bar and a close button. Below the title bar, it says 'Please provide Database information. This information will be used to create OpenLab Server database.' There is a text input field for 'Shared Services Database:' with the value 'OLSharedServices'. Below this is a section titled 'Authentication' with a subtitle 'Following new user will be created and used to access Shared Services Database'. Inside this section are three text input fields: 'Database User:' with the value 'Olss', 'Password:' with a masked value '*****', and 'Confirm Password:' with a masked value '*****'.

- For an Oracle server:
Create passwords for the Shared Services Database.

The screenshot shows the 'OpenLab Shared Services Server Database Wizard' window. On the left is a dark sidebar with the 'OpenLab Installer' logo and a list of steps: Database Type, Database Server, Database Authentication, Schema Information (highlighted in blue), Data Repository, Review, and Finish. The main area has a light gray background with the text 'Please provide Database information. This information will be used to create OpenLab Server database.' Below this is a section titled 'Shared Services Database' containing four input fields: 'Schema Name' with the value 'Olss', 'Password' with masked characters '*****', 'Confirm Password' with masked characters '*****', and 'Tablespace Path' with the value 'C:/USERS/APP/ORAPROCESS/ORADATA/OPENLAB/Olss.dbf'.

- For Microsoft SQL Server:
You can keep the default user or create a new SQL Server Database User.

The screenshot shows the 'OpenLab Shared Services Server Database Wizard' window for Microsoft SQL Server. The sidebar is identical to the Oracle version, with 'Schema Information' highlighted. The main area has the same introductory text. Below it, the 'Shared Services Database' field is set to 'OLSharedServices'. A section titled 'Authentication' contains two radio button options. The first option, 'Use Windows Authentication', is unselected. The second option, 'Create new SQL Server Database User', is selected. Below the selected option is a note: 'Following new user will be created and used to access Shared Services Database'. There are three input fields: 'Database User' with the value 'Olss', 'Password' with masked characters '*****', and 'Confirm Password' with masked characters '*****'.

Click **Next**.

- 6 Provide a password for the **Data Repository** accounts. Click **Next**.

The Data Repository is an internal storage infrastructure for diagnostic and topology related information.

OpenLab Shared Services Server Database Wizard

OpenLab Installer

- Database Type
- Database Server
- Database Authentication
- Schema Information
- Data Repository**
- Review
- Finish

Please provide a password for Data Repository accounts.

Password:

Confirm password:

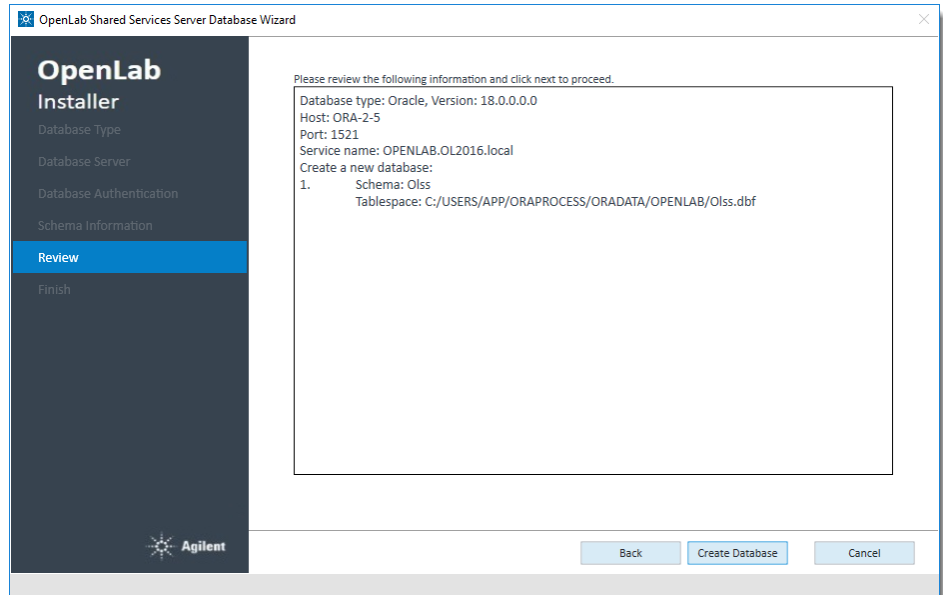
Back Next Cancel

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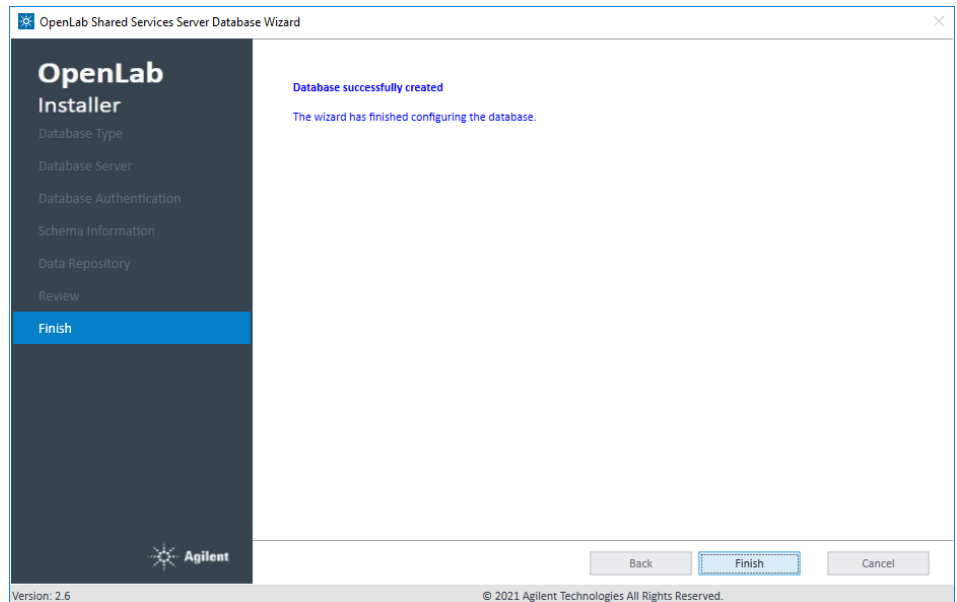
NOTE

In case of an upgrade to v2.6 this password will reset an existing DR password. Make sure to document the password at a secure location.

- 7 Review the information (see below an example for Oracle), and click **Create Database**.

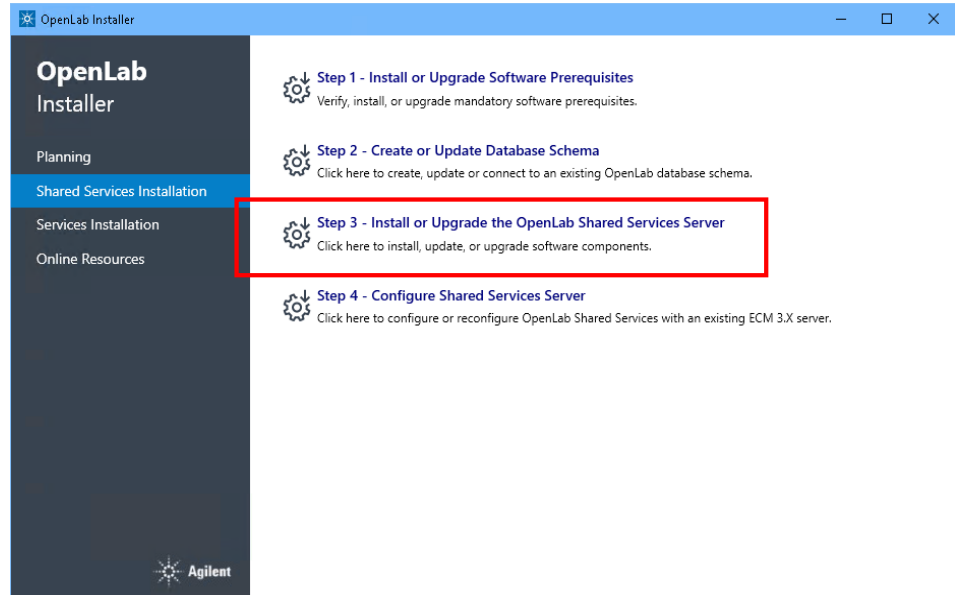


- 8 When the database has been successfully created, click **Finish**.

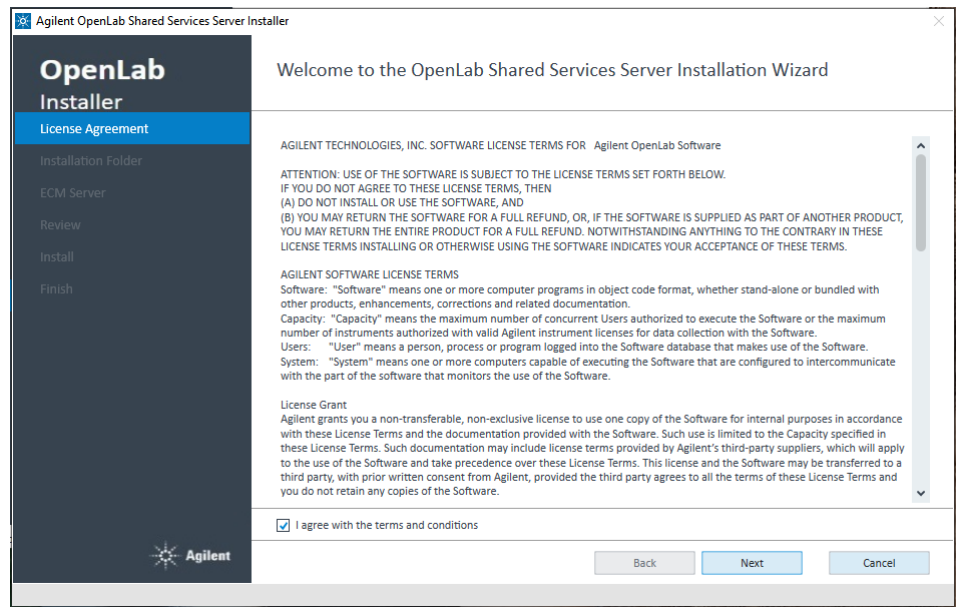


Step 3 - Install or Upgrade the OpenLab Shared Services Server

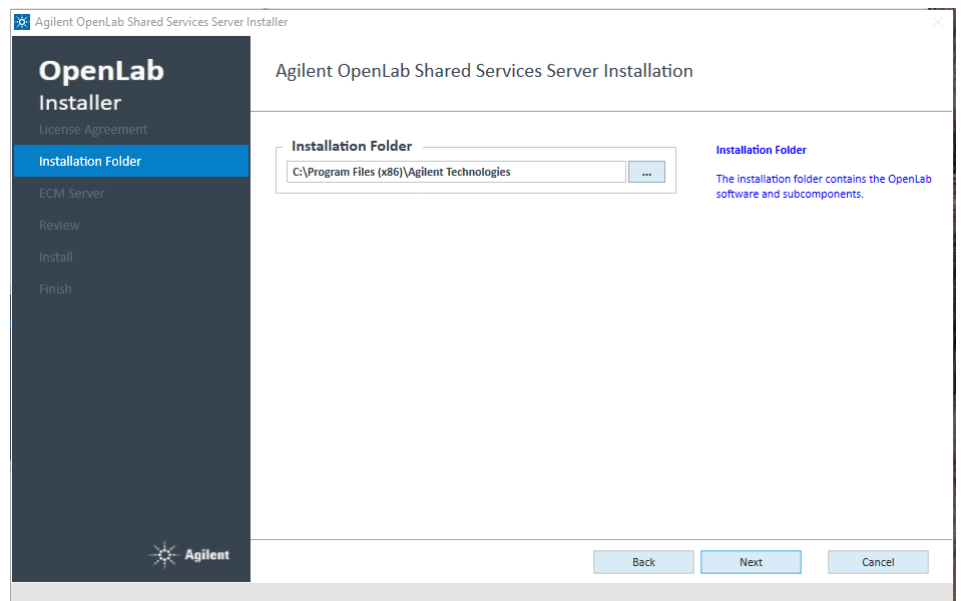
- 1 Click **Step 3 - Install or Upgrade the OpenLab Shared Services Server**.



2 License Agreement: Read and confirm Agilent terms and conditions.



3 Select the Installation Folder and click Next.



Install the Shared Services Server

Install or Upgrade the Shared Services server software

- 4 Provide the ECM **Server Name** and select the **Transfer Protocol**. If you choose **HTTPS**, enter the server name as a fully qualified domain name. Click **Next**.
If you upgrade an existing Shared Services server, the ECM server name is already filled.

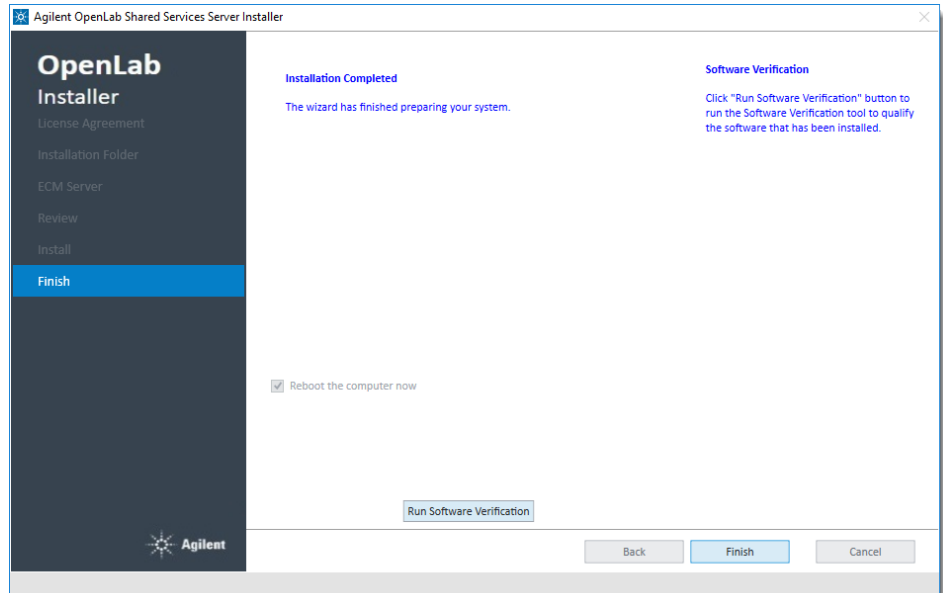
The screenshot shows the 'Agilent OpenLab Shared Services Server Installer' window. On the left is a dark sidebar with the 'OpenLab Installer' logo and a list of steps: License Agreement, Installation Folder, **ECM Server** (highlighted), Review, Install, and Finish. The main area is titled 'Enter the ECM Server name'. It contains a text box for 'Server Name' with the value 'ecm-3-6'. Below it is a 'Transfer Protocol' section with two radio buttons: 'HTTP' (selected) and 'HTTPS'. A green progress bar at the bottom is partially filled. At the bottom right are 'Back', 'Next', and 'Cancel' buttons.

- 5 Review the components to be installed and click **Install**.
The components are installed. When the installation is complete, click **Next**.

The screenshot shows the 'Agilent OpenLab Shared Services Server Installer' window at the 'Review' step. The sidebar on the left has 'Install' highlighted. The main area displays a table of components and their status, followed by a green progress bar at 100% and 'Back', 'Next', and 'Cancel' buttons at the bottom.

Components	Status
Microsoft .NET Framework	Detected
Agilent Software Verification Tool 8.01.01	Installed
Agilent OpenLab Certificate Service	Installed
Agilent OpenLab Certificate Service Tool	Installed
Agilent OpenLab Data Repository	Installed
Agilent OpenLab CDS Control Panel Help	Installed
Agilent OpenLab Shared Services	Installed
Agilent OpenLab Shared Services (64 bit)	Installed
Agilent OpenLab Storage Client Services	Installed
Agilent OpenLab ECM Storage Plugin	Installed
Configuration Utility	Installed
Agilent OpenLab Audit Trail Service	Installed
Agilent OpenLab ECM API	Installed
Agilent OpenLab Data Collection Service	Installed
Agilent OpenLab Data Collection Agent	Installed

- 6 The confirmation *Installation Completed* is displayed. You may **Run Software Verification** at this point.



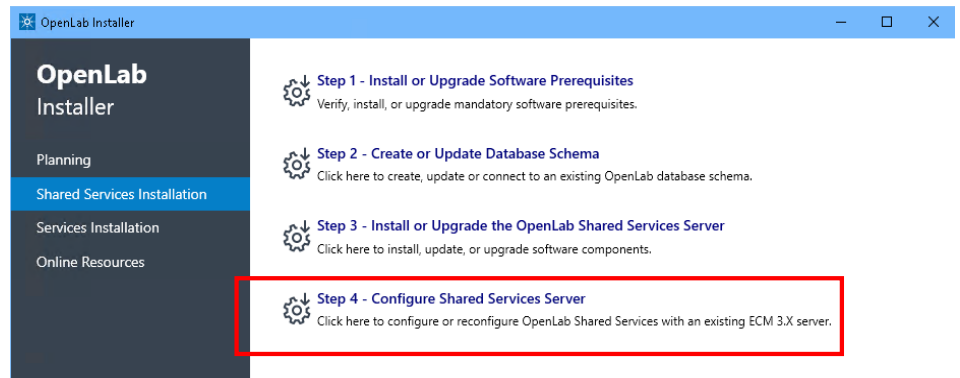
Click **Finish**. Your computer will be rebooted.

After the reboot, if Step 4 does not automatically start, it can be started manually from the Installer menu.

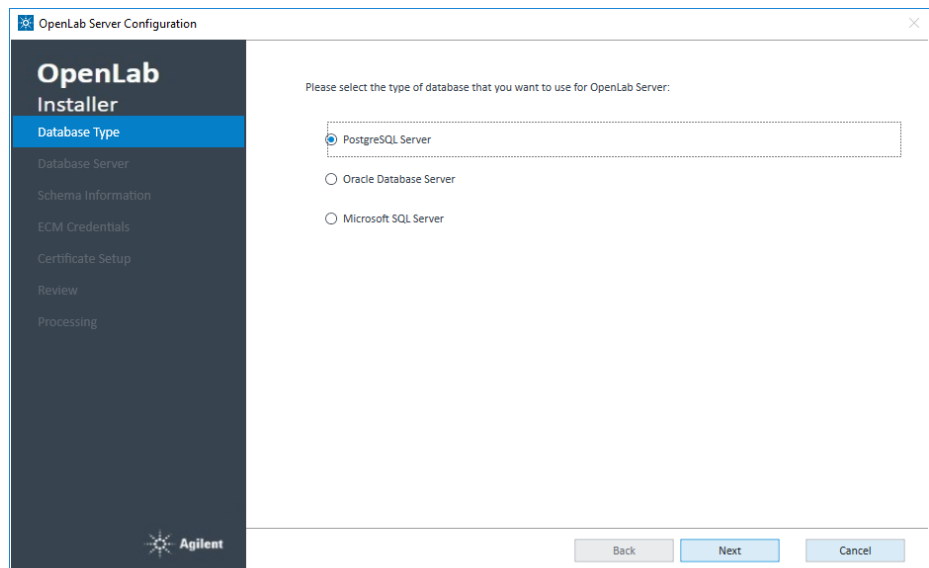
Step 4 - Configure Shared Services Server

If the installation does not resume after the reboot, use the OpenLab Shared Server Configuration utility to configure or reconfigure an OpenLab Shared Services Server, or open Step 4 from Installer.

- 1 Click **Step 4 - Configure OpenLab Shared Services Server**.



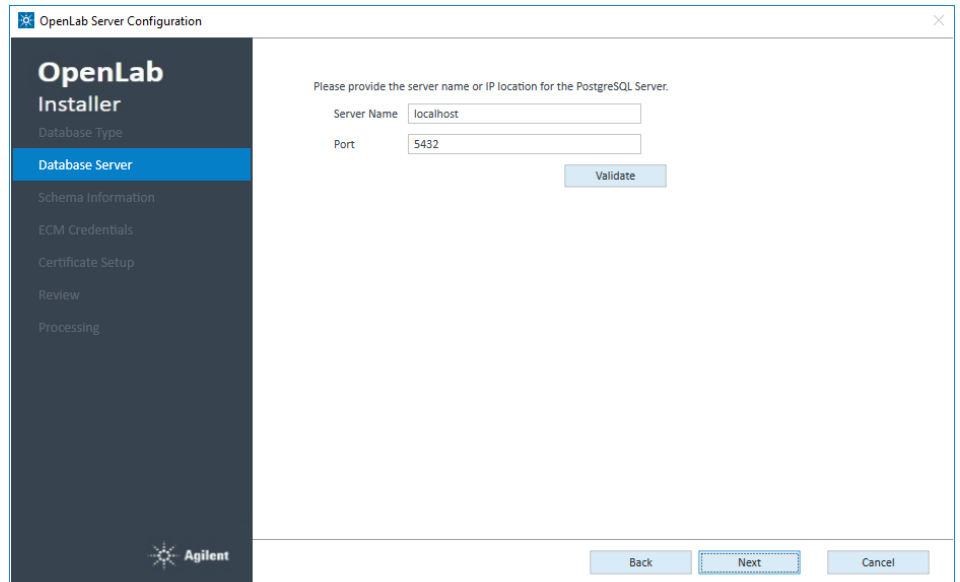
- 2 Select the type of database to use, and click **Next**. By default, your selections from "Step 1 - Install or Upgrade Software Prerequisites" on page 27 will be displayed.



Install the Shared Services Server

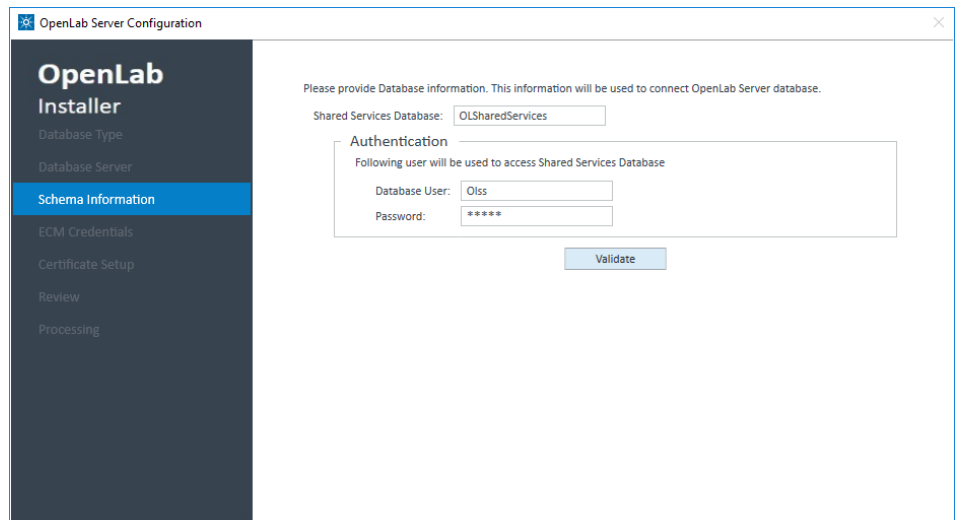
Install or Upgrade the Shared Services server software

- On the **Database Server** tab enter the required information and click **Next**.



The screenshot shows the 'OpenLab Server Configuration' window with the 'Database Server' tab selected. The left sidebar lists the installation steps: Database Type, Database Server (highlighted), Schema Information, ECM Credentials, Certificate Setup, Review, and Processing. The main area prompts the user to provide the server name or IP location for the PostgreSQL Server. The 'Server Name' field contains 'localhost' and the 'Port' field contains '5432'. A 'Validate' button is present. At the bottom, there are 'Back', 'Next' (highlighted with a dashed border), and 'Cancel' buttons.

- On the **Schema Information** tab, enter the information for your Shared Services Database, and **Validate**.



The screenshot shows the 'OpenLab Server Configuration' window with the 'Schema Information' tab selected. The left sidebar highlights 'Schema Information'. The main area prompts the user to provide database information. The 'Shared Services Database' field contains 'OLSharedServices'. Below it, the 'Authentication' section prompts for the user to access the database. The 'Database User' field contains 'Olss' and the 'Password' field contains '*****'. A 'Validate' button is present. At the bottom, there are 'Back', 'Next' (highlighted with a dashed border), and 'Cancel' buttons.

If the user can connect to the Shared Services Database, click **Next** to proceed to the **ECM Credentials** tab.

- 5 The ECM server name will be read-only as you have already provided in step 3. Click **Test Connection** to verify that the connection to your ECM server is working.

OpenLab Server Configuration

OpenLab Installer

Database Type
Database Server
Schema Information
ECM Credentials
Certificate Setup
Review
Processing

Connect to ECM Server

Server Connection

ECM server name: AO-AGTECM3x

Test Connection

Administrator Authentication

ECM user name: admin

ECM password: *****

ECM account: DEMO

ECM domain: BUILT-IN

Shared Services Storage Path

Validate

Back Next Cancel

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Test Connection:

To test connection, enter the ECM server name and click "Test Connection" to verify that the connection from the machine to the ECM server is functioning.

In the course of the subsequent installation the connection will be used to download and install ECM client components onto this machine from the ECM server

You do not need to specify the protocol (http or https). The complete URL will be generated automatically by the system.

Shared Services Storage Path

Determines the path on the ECM server where Shared Services will store all projects and data.

If ECM connection or data upload is failing, restart the Agilent OpenLAB ECM-API 32-bit Service from Windows Services.

If you are using a Citrix server ensure you followed the instructions provided under "Citrix Client" on page 8.

- 6 Enter the **Administrator Authentication** details and the **Shared Services Storage Path**.

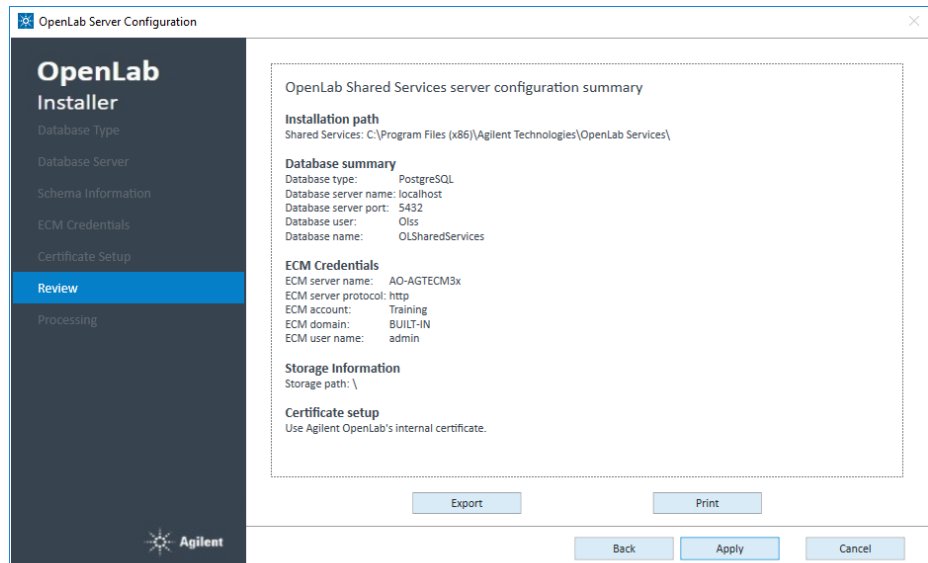
NOTE

The path must not be empty! You may keep the slash that is suggested by default. The project paths should be configured manually later using the OpenLab Control Panel (see "Examples for Organizing Data in OpenLab ECM" on page 62)

Click **Validate** to check your entries.

- 7 Click **Next**.

- 8 On the **Review** tab, check the Shared Services server configuration summary. To save the configuration file, click **Export** or **Print** the summary report.



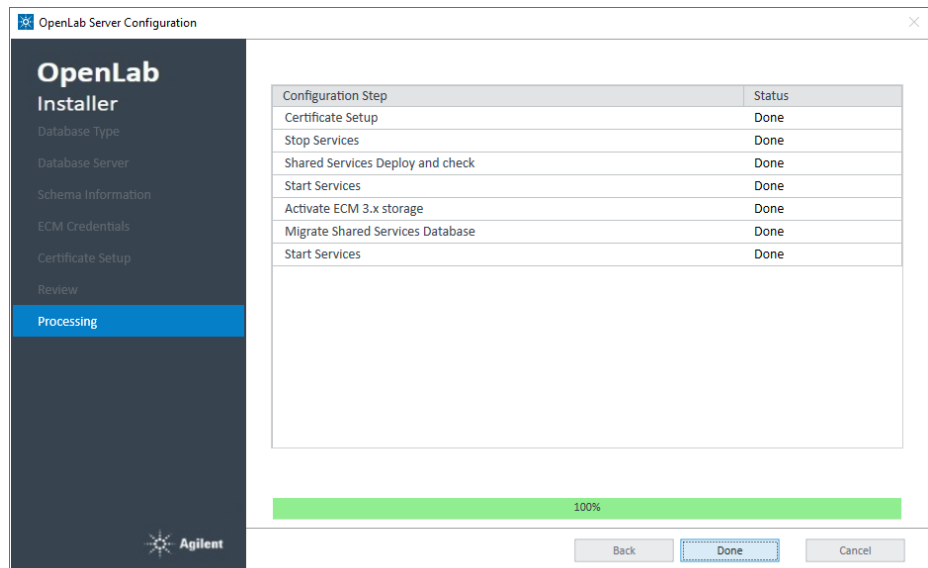
The screenshot shows the 'OpenLab Server Configuration' window with the 'Review' tab selected. The left sidebar lists the configuration steps: Database Type, Database Server, Schema Information, ECM Credentials, Certificate Setup, **Review**, and Processing. The main area displays the 'OpenLab Shared Services server configuration summary' with the following details:

- Installation path:** Shared Services: C:\Program Files (x86)\Agilent Technologies\OpenLab Services\
- Database summary:**
 - Database type: PostgreSQL
 - Database server name: localhost
 - Database server port: 5432
 - Database user: Olss
 - Database name: OLSharedServices
- ECM Credentials:**
 - ECM server name: AO-AGTECM3x
 - ECM server protocol: http
 - ECM account: Training
 - ECM domain: BUILT-IN
 - ECM user name: admin
- Storage Information:**
 - Storage path: \
- Certificate setup:** Use Agilent OpenLab's internal certificate.

At the bottom of the main area are buttons for 'Export' and 'Print'. Below the main area are buttons for 'Back', 'Apply', and 'Cancel'.

Click **Apply** to proceed.

- 9 When the configuration is complete, click **Done**.



The screenshot shows the 'OpenLab Server Configuration' window with the 'Processing' tab selected. The left sidebar is the same as in the previous screenshot, but 'Processing' is now highlighted. The main area displays a table showing the status of various configuration steps:

Configuration Step	Status
Certificate Setup	Done
Stop Services	Done
Shared Services Deploy and check	Done
Start Services	Done
Activate ECM 3.x storage	Done
Migrate Shared Services Database	Done
Start Services	Done

Below the table is a green progress bar showing 100% completion. At the bottom of the window are buttons for 'Back', 'Done' (highlighted), and 'Cancel'.

Your Shared Services Server is configured now to work in the OpenLab ECM environment.

Rebuild the Activity Log Index

After database or system restore, searching the Shared Services Activity log requires a fully built index.

The Activity Log Index is automatically rebuilt in the following scenarios:

- You are using a file-based Workstation configuration using a Firebird database
- The Shared Services database has been restored with a fresh installation
- You are migrating or upgrading your data

After the upgrade completes, the rebuilding of the index for Shared Services Activity Log continues in the background.

Use the following procedure to rebuild the Activity Log Index in case the Activity Log table or data is corrupted or when the Shared Services database has been restored with an existing OpenLab installation.

How to manually rebuild the Activity Log Index

A manual rebuild of the Activity Log Index is needed when the Activity Log table or data is corrupted or when the Shared Services database has been restored with an existing OpenLab installation.

The time required to rebuild the index depends on your database type and the amount of Activity Log records. It may take up to a few hours. During this time, you cannot search the Activity Log in the application.

To rebuild the Activity Log,

- 1 Start the command prompt as an administrator.
- 2 Run the following command:

```
net stop SharedServicesHost && del /s /f /q  
%ProgramData%\Agilent\OLSS\Index\ActivityLog && net  
start SharedServicesHost
```

Possible Errors

The following messages might occur in case of errors:

- **The Agilent OpenLab Shared Services service is not started. More help is available by typing NET HELPMSG 3521.**

Solution:

Use the following command instead:

```
del /s /f /q %ProgramData%\Agilent\OLSS\Index\
ActivityLog && net start SharedServicesHost
```

- **System error 5 has occurred. Access is denied.**

Solution:

Make sure Command Prompt has been started as administrator

3

Configure the Shared Services Server

Access the Control Panel	50
Verify Connection of Shared Services Server to ECM	50
Configure Users and Roles	51
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No Access	60
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Configure Project Paths	61
Examples for Organizing Data in OpenLab ECM	62

This chapter describes the initial configuration steps after installing the OpenLab Shared Services server software.

Access the Control Panel

All configuration tasks for the Shared Services server, such as security settings, project management or user management, are performed in the OpenLab Control Panel.

- 1 On the Shared Services Server, open the Control Panel from the desktop shortcut, or go to **Start > All Programs > Agilent Technologies > Control Panel**.
- 2 Log in with your ECM administrator credentials.

Verify Connection of Shared Services Server to ECM

These settings are present by default. Follow the procedure to confirm everything is correct.

- 1 On the Shared Services Server, open the Control Panel from the desktop shortcut, or go to **Start > All Programs > Agilent Technologies > Control Panel**.
- 2 From the navigation pane, select **Administration > System Configuration**.
- 3 Note the **Storage path**. This is the path in ECM that will contain all your projects. It may simply be a slash. The single project paths are configured manually (see ["Configure Project Paths"](#) on page 61)
- 4 In the **System Configuration** toolbar, select **Edit System Settings**.
- 5 In the **Edit System Settings** window, verify that **ECM** is currently configured as authentication provider and as storage type.
- 6 Click **Cancel** to close the dialog and keep current settings.

Configure Users and Roles

User management is described in detail in the OpenLab CDS Client/AIC installation guide (CDS_ClientAIC.pdf).

With ECM as an authentication provider, you have the option to import users from ECM. For example, import the built-in ECM users **Chemist** or **Technician**.

Import Users

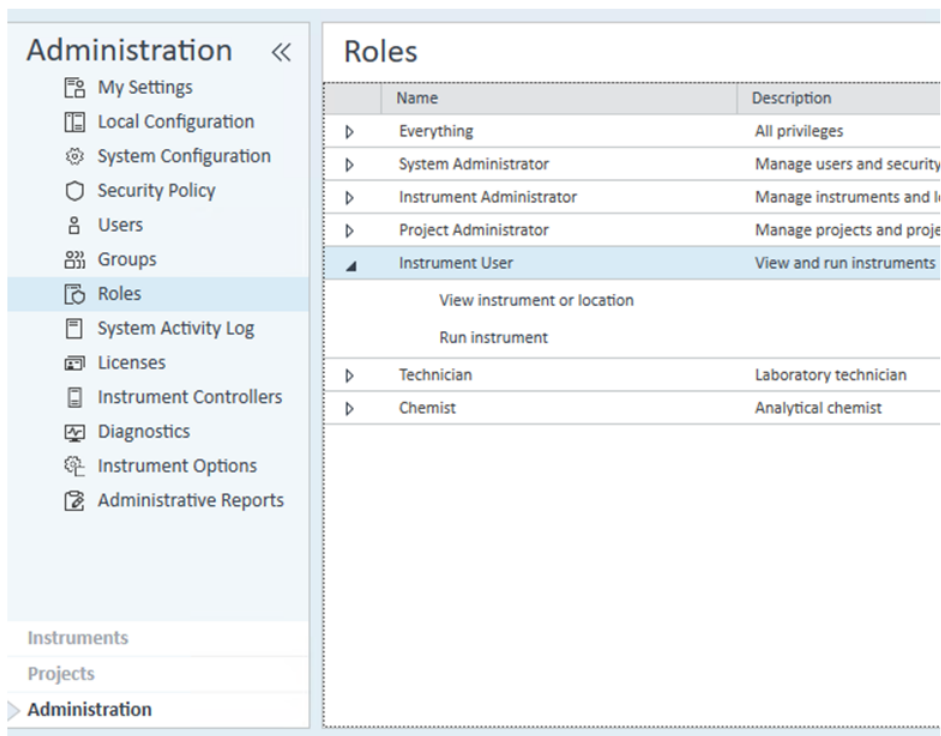
Use the Control Panel to manage the roles and privileges. You can create custom roles, or assign one or more of the predefined roles to give users varying degrees of access.

To add users to your system, you must have privileges to obtain user and group information from ECM 3.x.

- 1 From the navigation pane, click **Administration > Users**.
- 2 In the ribbon, click **Import User**.
- 3 In the **Search Users** dialog box, enter search string for the ECM 3.x username.
- 4 From the **Search Results** list, select the user you want to import, and click **Add**. The user is added to the **Selected Users** list.
- 5 Repeat steps 2 to 4 until you have added all the user names that you want to import to the **Selected Users** list, then click **OK**.
- 6 Assign roles to the users to give them the required OpenLab CDS permissions.

Default Roles

For OpenLab CDS several default roles are provided, such as **Chemist**, **Technician**, or **Project Administrator**. Each role has specific project level privileges. If required, these roles may be edited. To configure roles, choose **Administration > Roles** in the OpenLab Control Panel.

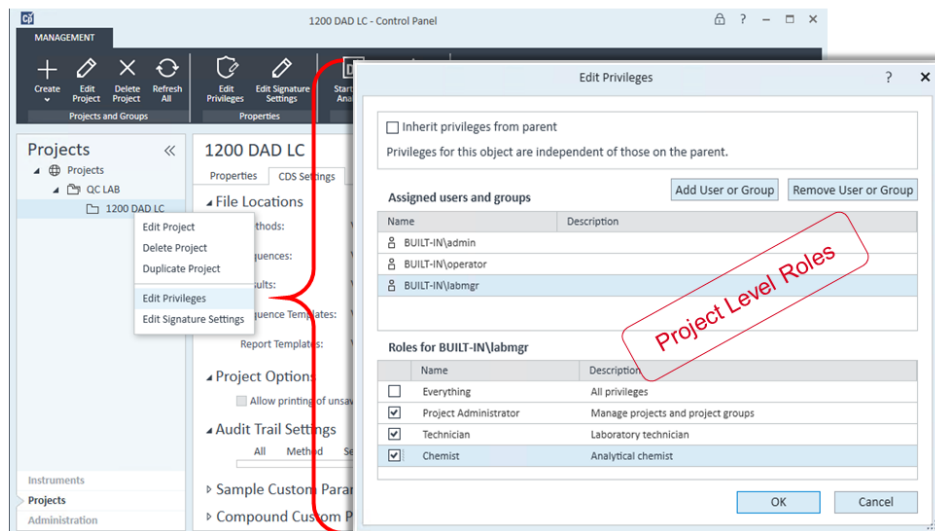


The screenshot shows the OpenLab Control Panel interface. On the left is a sidebar menu under the heading "Administration <<". The menu items are: My Settings, Local Configuration, System Configuration, Security Policy, Users, Groups, Roles (highlighted), System Activity Log, Licenses, Instrument Controllers, Diagnostics, Instrument Options, and Administrative Reports. Below the main menu are three expandable sections: Instruments, Projects, and Administration (which is expanded, showing the Roles page). The main content area is titled "Roles" and contains a table with two columns: Name and Description.

	Name	Description
▸	Everything	All privileges
▸	System Administrator	Manage users and security
▸	Instrument Administrator	Manage instruments and l
▸	Project Administrator	Manage projects and proje
▲	Instrument User	View and run instruments
	View instrument or location	
	Run instrument	
▸	Technician	Laboratory technician
▸	Chemist	Analytical chemist

Project-Level Roles

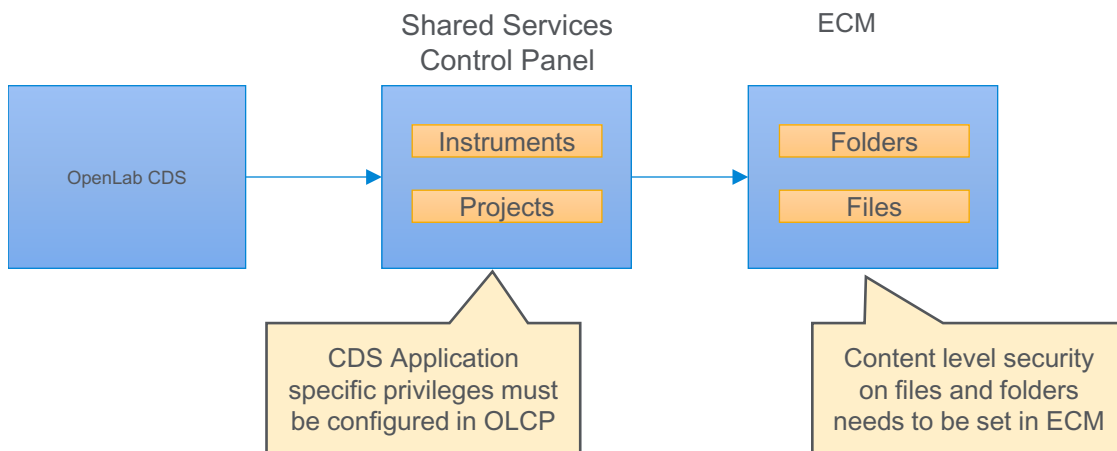
A user can have different roles for different projects. To change the settings for a project, right-click a project, select **Edit Privileges**, and clear the **Inherit privileges from parent** check box in the dialog.



Security Settings

Users need permissions in both ECM and OpenLab CDS:

- OpenLab CDS:
CDS application specific privileges are configured in the OpenLab Control Panel. OpenLab CDS provides default roles that can be adjusted. See ["Default Roles"](#) on page 52
- ECM:
Privileges to access content stored in ECM are configured in ECM. See ["Read/Write Access"](#) on page 55 and ["Read-Only Access"](#) on page 57
ECM privileges must be assigned to at least one of your roles in order to become active.



Read/Write Access

OpenLab CDS The Project privilege **Project Management > Edit content of project** is required in addition to the **view project or project group** privilege.

Create Role

Name:

Description:

Role type

☒ Project ☐ Instrument ☐ Administrative

Role privileges Members

Role privileges:

	Name	Description
<input checked="" type="checkbox"/>	Project Management	Project Privilege Group
<input checked="" type="checkbox"/>	View project or project group	Shared Services
<input type="checkbox"/>	Manage project or project group	Shared Services
<input checked="" type="checkbox"/>	Edit content of project	Shared Services
<input type="checkbox"/>	Delete content of project	Shared Services
<input type="checkbox"/>	Manage project or project group access	Shared Services

ECM The list of ECM privileges described in the following table is the minimum set of privileges allowing full read/write access from OpenLab CDS. These ECM privileges are required to ensure that results from operations such as data acquisition, data analysis, or e-signature are uploaded to the repository.

Table 4 ECM privileges for read/write access in OpenLab CDS

Privilege	View	Edit	Delete	Add	Run	Description of privilege
Content: File	X			X		Access files <ul style="list-style-type: none"> Required to acquire and process data
Content: File Filtering		X				Add files to an ECM folder <ul style="list-style-type: none"> Required to acquire and process data
Content: File Revisions	X					View revisions <ul style="list-style-type: none"> Required to acquire and process data
Content: File Associations	X					View associations <ul style="list-style-type: none"> Required to acquire and process data
Content: File Type [XLS]				X		Add and check-in files with an.xls extension
Content: Folder	X	X		X		View ECM properties

Table 4 ECM privileges for read/write access in OpenLab CDS

Privilege	View	Edit	Delete	Add	Run	Description of privilege
System: Audit Trail	X					View ECM Audit Trail
System: Filtering Configuration	X					View or change the filtering configuration Use attribute extraction services Manage user-defined attributes
System: indexing Configuration	X					Access ECM indexing (minimum privilege)
System: Advanced Search					X	Use Search in OpenLab CDS <ul style="list-style-type: none"> Required for Data Analysis
System: Quick Search					X	Use Search in OpenLab CDS

Privilege to Delete Content

- OpenLab CDS

By default the Read/Write Access does not include the privilege to delete content of projects. If the specific workflow requires to delete files within a CDS project, add the project privilege **Project Management > Delete content of project**.
- ECM

You need the ECM privilege **Content:File:Delete**. Note that it allows you to delete other files in ECM 3.x.

CAUTION

Handle the Content:File:Delete privilege with care.
If users shall be allowed to delete report templates, sequences, and methods from OpenLab CDS, they need the Content:File:Delete privilege in addition. However, users with this privilege can also delete any other data from ECM.

✓

Only apply the Content:File:Delete privilege if this is needed for a specific workflow, and restrict it to the relevant folders.

Read-Only Access

The list of ECM privileges described in the following table is required for read-only access from OpenLab CDS.

Table 5 ECM privileges for read-only access in OpenLab CDS

Privilege	View	Edit	Delete	Add	Run	Description
Content: File	X					Privilege to access files Required to acquire and process data
Content: File Filtering						Privilege to add files to an ECM folder Required to acquire and process data
Content: File Revisions	X					Privilege to view revisions Required to acquire and process data
Content: File Associations	X					Privilege to view associations Required to acquire and process data
Content: File Type [XLS]						Privilege to add and check in files with an.xls extension
Content: Folder	X					Privilege to view ECM properties
System: Audit Trail	X					Privilege to view ECM Audit Trail
System: Filtering Configuration	X					Privilege to view or change the filtering configuration Privilege to use attribute extraction services Privilege to manage user-defined attributes
System: indexing Configuration	X					Minimum privilege to access ECM indexing
System: Advanced Search					X	Privilege to use Search in OpenLab CDS Required for Data Analysis
System: Quick Search					X	Privilege to use Search in OpenLab CDS

Specific CDS Role for Read-Only Access

For a read-only access to ChemStation or EZChrom data stored in ECM, ECM privileges are not sufficient. In addition, you must configure and assign a specific CDS role in the OpenLab Control Panel.

Prerequisites

The read-only access includes *ChemStation* or *EZChrom* data stored in ECM.

- 1 In the OpenLab Control Panel, navigate to **Administration > Roles**.
- 2 Click **Create role** with only the privilege **View project or project group**.

Create Role

Name:

Description:

Role type

☒ Project ☐ Instrument ☐ Administrative

Role privileges | **Members**

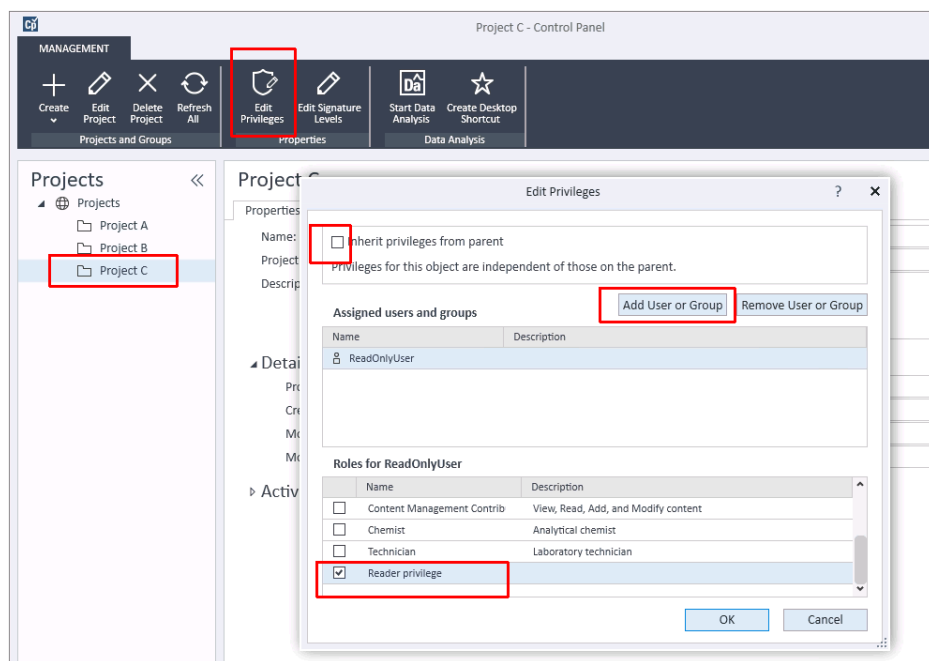
Role privileges:

	Name	Description
<input checked="" type="checkbox"/>	Project Management	Project Privilege Group
<input checked="" type="checkbox"/>	View project or project group	
<input type="checkbox"/>	Manage project or project group	
<input type="checkbox"/>	Edit content of project	
<input type="checkbox"/>	Manage project or project group access	
<input type="checkbox"/>	E-Signature	E-Signature
<input type="checkbox"/>	Sample Prep	Access to sample prep related functions
<input type="checkbox"/>	Acquisition Method	Access to method editing functions
<input type="checkbox"/>	Processing Method	Access to processing method related functions
<input type="checkbox"/>	Report Template	Access to report template designer
<input type="checkbox"/>	Sequence Template	Access to sequence template related functions
<input type="checkbox"/>	Sequence	Access to sequence related functions
<input type="checkbox"/>	Audit Trail	Access to audit trail related functions
<input type="checkbox"/>	Control	Access to instrument control related functions
<input type="checkbox"/>	Data Processing	Access to data processing related functions
<input type="checkbox"/>	File and Folder Operations	Access to file and folder delete operations
<input type="checkbox"/>	Data	Access to data related functions

OK **Cancel**

- 3 Save the new role.

- 4 Select the **Projects** page and navigate to the relevant project.
- 5 In the ribbon, click **Edit privileges**.
- 6 Clear the **Inherit privileges from parent** check box.
- 7 When you are asked if you want to copy settings from the parent node, click **No**.
- 8 Add the ECM user who shall have the read-only access to this project.
- 9 Assign the newly created role to this user.



- 10 Confirm your settings.

No Access

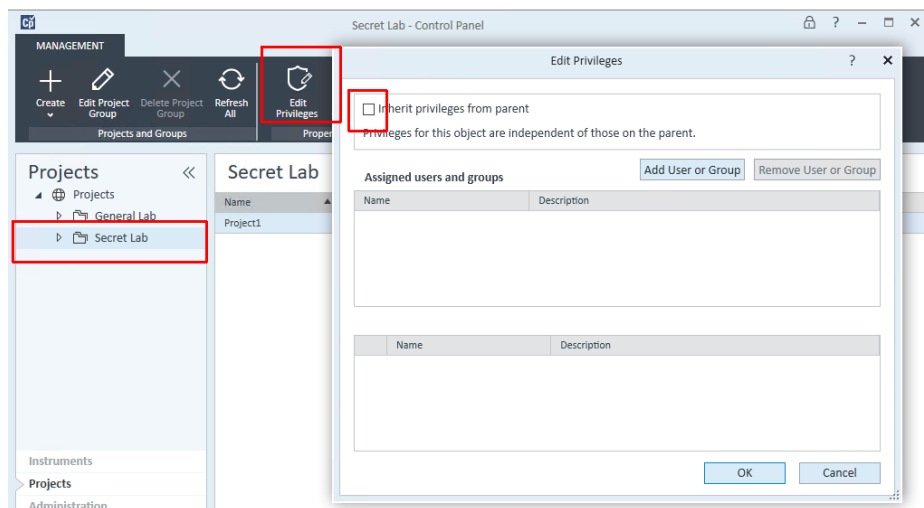
Roles and security allow you to completely isolate two projects - for example, for ChemStation data and new OpenLab CDS 2.x data.

Here is an example scenario: You have multiple divisions which have their own labs. Some of the divisions are working on secret projects and the work being done in their labs (*Secret Lab*) must not be accessible to users in other labs (*General Lab*). There are multiple projects in each lab.

Currently users in all labs store their data generated in ChemStation in ECM 3.x. Security is set up so that the data, methods, etc. owned by users in Secret Lab are not visible to users in General Lab.

If some of the instruments are upgraded to CDS 2.x, you will be able to secure the system in a similar manner so that users in General Lab cannot view data from Secret Lab regardless of whether they are using ChemStation or CDS 2.x.

- 1 Create separate project groups for the two labs.
- 2 For the Secret Lab, edit the privileges, and clear the **Inherit privileges from parent** check box. When you are asked if you want to copy settings from the parent node, click **No**.




- 3 Add users and assign roles to the users as required. These settings are only relevant for the projects in the Secret Lab project group.

In addition to setting up restrictive project access in the Control Panel, privileges in the corresponding ECM paths must also be restricted. Users who should not have access to a path should not be given any privilege to those paths.

About Projects

Configure Project Paths

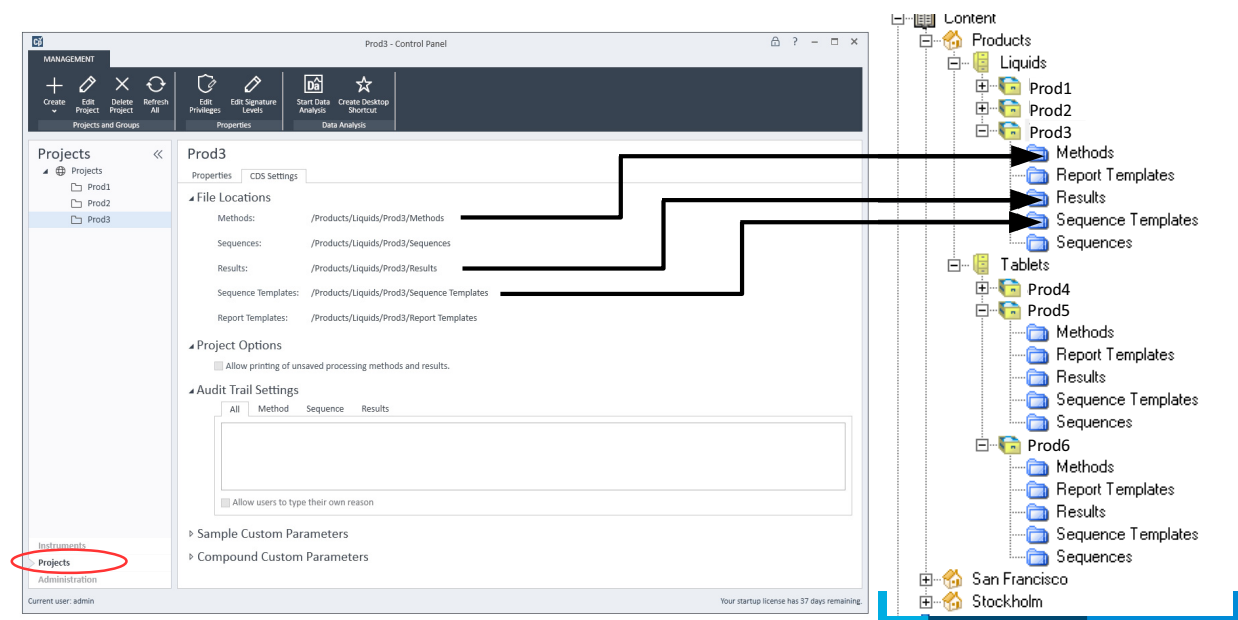
When creating a project in the OpenLab Control Panel, you must adjust the **Project folder path** and the **File Locations**.

- 1 From the navigation pane, select **Projects**, and navigate to your project.
- 2 Click  **Edit Project**.
- 3 On the **Properties** tab under **Project folder path**, provide the root folder for your project. This path corresponds to the root path of your project in ECM.
The first part of the path is the **Storage path**. It has been defined during installation.
- 4 On the **CDS Settings** tab under **File Locations**, provide the different paths.
All OpenLab ECM installations have exactly four levels (Location, Container, Drawer, Folder). Data can only be stored on folder level. Therefore, all file locations must point to an OpenLab ECM folder.
The way you set up projects depends on how your data is organized in OpenLab ECM. For example, your data structure may be product centric, instrument centric, or user centric. See the following examples.

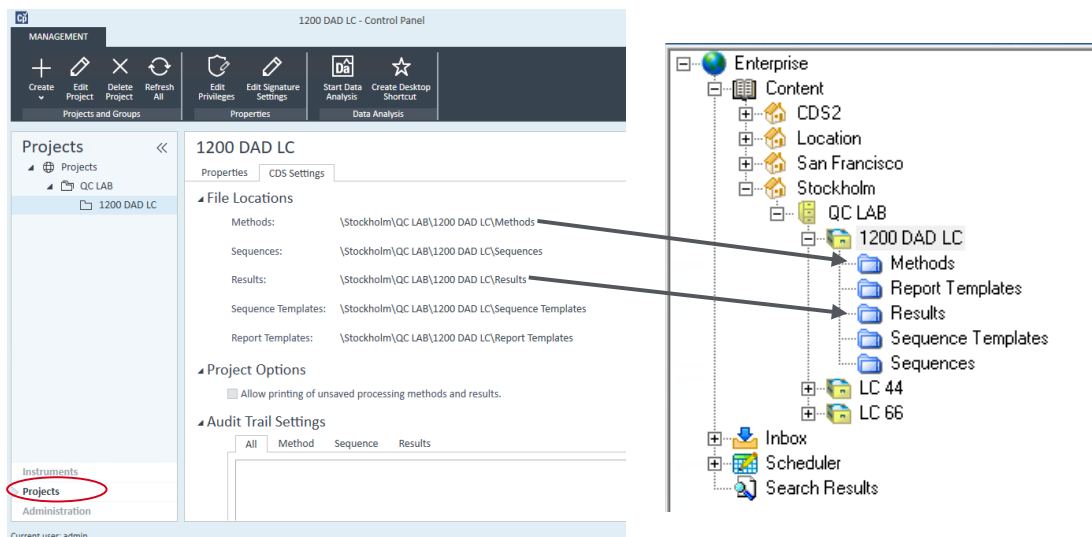
Examples for Organizing Data in OpenLab ECM

For details on creating and configuring projects, refer to the Control Panel section in OpenLab Help & Learning.

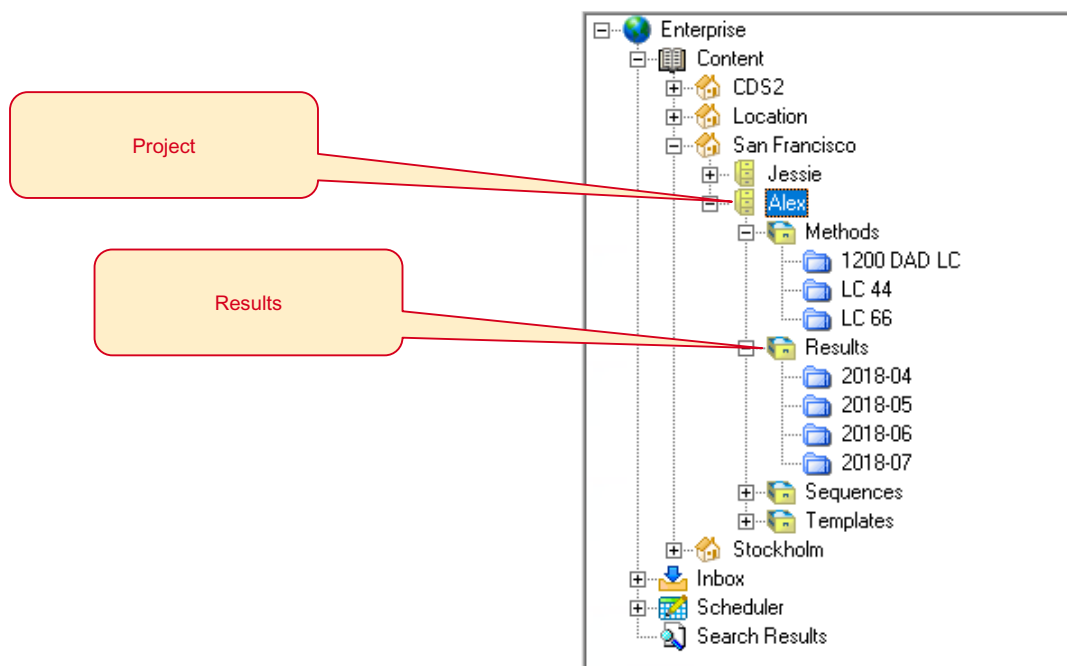
Product centric



Instrument centric



User centric





4

Working with OpenLab CDS and OpenLab ECM

Working with OpenLab CDS Data in OpenLab ECM 65

Working with Existing ChemStation or EZChrom Data 66

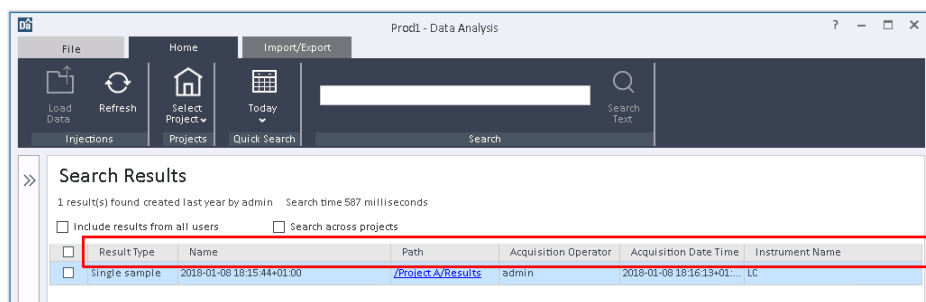
This chapter contains basic information on working with an Agilent OpenLab CDS system that is connected to OpenLab ECM.

Working with OpenLab CDS Data in OpenLab ECM

Search

To enable the Quick Search in OpenLab CDS, you must set the search keys in ECM.

The search keys correspond to the columns shown in the Quick Search results:



NOTE

If a search key is not set for one of the search results columns, this field will either appear empty or show a default value.

Since OpenLab CDS 2.5, the search functionality gets enhanced when ECM 3.6 Update 02 or above is installed. In this case search results are based on the extracted metadata keys for OpenLab CDS.

When used with ECM 3.6 or ECM 3.5 Update 6, searching from within OpenLab CDS will find results based on CDS injection metadata.

For more details on search, please refer to the OpenLab ECM help.

Working with Existing ChemStation or EZChrom Data

Loading data

Your OpenLab ECM folders may contain SSIZip files produced by a ChemStation or EZChrom system. When you load such results, the data is automatically converted to the OpenLab CDS format before being displayed. On saving the results, a new result set in OpenLab CDS format is saved with the same name but with an OpenLab CDS extension. The original data remains unchanged. The **Result Set Audit Trail** of the new data will include the name of the original CS/EE SSIZip file.

A ChemStation or EZChrom result set will be displayed as read-only if it has already been upgraded and a corresponding OpenLab CDS format result set exists in ECM 3.x.

Original data and OpenLab CDS data are shown with different icons in the OpenLab CDS injection tree.

Revisions

In OpenLab CDS you can only load the latest revision of your ChemStation or EZChrom data.

Search

Since Openlab CDS v2.5, the search functionality gets enhanced when ECM 3.6 Update 02 or above is installed. In this case search results are based on the extracted metadata keys for OpenLab CDS. The search will also find ChemStation and EZChrom files by looking at extracted keys.

When used with older versions of ECM 3.x, searching from within OpenLab CDS will only find results based on OpenLab CDS injection metadata. SSIZip files that have been generated by ChemStation or EZChrom systems will not be listed in the search results.

After first saving with OpenLab CDS, the OpenLab CDS version of the ChemStation and EZChrom data will be found by the search. Please note that filter key extraction with ECM happens after saving the data. Therefore a delay between acquiring/saving data and finding them with a search is to be expected.



5

Maintenance of the Shared Services Server

Data Repository Backup 68

Data Repository Restore 69

This chapter contains information on specific backup and restore procedures.

Data Repository Backup

The Data Repository provides a storage infrastructure used to store diagnostic and topology related information.

Prerequisites

Your Windows user must have read/write access to the backup directory.

PowerShell execution is enabled.

- 1 Run Windows PowerShell.
- 2 Navigate to the backup script path. By default, this is C:\Program Files (x86)\Agilent Technologies\OpenLab Platform\Data Repository\OpenLab DataRepository\Base\Scripts\PostgreSQL\Backup\.
- 3 Enter the following command:

```
./dr-db-backup.ps1 -user druser -path <backup path>
```

For example:

```
./dr-db-backup.ps1 -user druser -path C:\temp
```

PostgreSQL backup files are created in the given location.

Return codes:

- 0: Success
- 1: Other error
- 2: Backup directory is invalid

NOTE

If the script returns an execution policy error, try the following commands in a Command window before running the script again:

```
PowerShell.exe Set-ExecutionPolicy RemoteSigned -Force
```

```
PowerShell.exe Unblock-File <script path>
```

If there is still an error, see

https://docs.microsoft.com/en-us/powershell/module/microsoft.powershell.core/about/about_execution_policies?view=powershell-5.1 for details on the execution policy.

Data Repository Restore

Prerequisites

Your Windows user must have read access to the backup directory.
PowerShell execution is enabled.

- 1 Run Windows PowerShell.
- 2 Navigate to the restore script path. By default, this is C:\Program Files (x86)\Agilent Technologies\OpenLab Platform\Data Repository\OpenLab DataRepository\Base\Scripts\PostgreSQL\Backup\.
- 3 Enter the following command:

```
./dr-db-restore.ps1 -user druser -path <backup path>
```

For example:

```
./dr-db-restore.ps1 -user druser -path C:\temp
```

The Data Repository database is restored.

Return codes:

- 0: Success
- 1: Other error
- 2: Backup directory is invalid

NOTE

If the script returns an execution policy error, try the following commands in a Command window before running the script again:

```
PowerShell.exe Set-ExecutionPolicy RemoteSigned -Force  
PowerShell.exe Unblock-File <script path>
```

If there is still an error, see

https://docs.microsoft.com/en-us/powershell/module/microsoft.powershell.core/about/about_execution_policies?view=powershell-5.1 for details on the execution policy.

In This Book

This document provides information on configuring OpenLab CDS with an OpenLab ECM system.

It includes information on OpenLab CDS interoperability with OpenLab ChemStation or EZChrom.

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