Agilent Migration Tools for OpenLab

OpenLab CDS ChemStation and EZChrom Edition to OpenLab CDS Workstation

User Guide

Notices

Manual Part Number

M8413-90030
Rev. D, January 2019

Copyright

© Agilent Technologies, Inc. 2019

No part of this manual may be reproduced in any form or by any means (including electronic storage and retrieval or translation into a foreign language) without prior agreement and written consent from Agilent Technologies, Inc. as governed by United States and international copyright laws.

Agilent Technologies, Inc.
5301 Stevens Creek Boulevard
Santa Clara, CA 95051 USA

Software Revision

This guide is valid for the 1.5 revision or higher of the Agilent Migration Tools for OpenLab program until superseded.

Warranty

The material contained in this document is provided "as is," and is subject to being changed, without notice, in future editions. Further, to the maximum extent permitted by applicable law, Agilent disclaims all warranties, either express or implied, with regard to this manual and any information contained herein, including but not limited to the implied warranties of merchantability and fitness for a particular purpose. Agilent shall not be liable for errors or for incidental or consequential damages in connection with the furnishing, use, or performance of this document or of any information contained herein. Should Agilent and the user have a separate written agreement with warranty terms covering the material in this document that conflict with these terms, the warranty terms in the separate agreement shall control.

Technology Licenses

The hardware and/or software described in this document are furnished under a license and may be used or copied only in accordance with the terms of such license.

Restricted Rights Legend

U.S. Government Restricted Rights. Software and technical data rights granted to the federal government include only those rights customarily provided to end user customers. Agilent provides this customary commercial license in Software and technical data pursuant to FAR 12.211 (Technical Data) and 12.212 (Computer Software) and, for the Department of Defense, DFARS 252.227-7015 (Technical Data - Commercial Items) and DFARS 227.7202-3 (Rights in Commercial Computer Software or Computer Software Documentation).

Safety Notices

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 guide provides step-by-step instructions for migrating data, instrument information, and user information, from OpenLab CDS ChemStation Edition, ChemStation, and OpenLab CDS EZChrom Edition to OpenLab CDS Workstation version 2.4 using the Migration Tools for OpenLab (Migration Tools).

1 Introduction

This chapter provides an overview of the migration process using the Migration Tools for OpenLab.

2 Preparing for Migration

This chapter provides information about the pre-migration setup.

3 Migrating Data from ChemStation Edition and ChemStation B

This chapter contains procedures for migrating data from OpenLab CDS ChemStation Edition or ChemStation B to OpenLab CDS Workstation using the Migration Tools for OpenLab. The Migration Tools export raw and results data, shared services information, instrument configuration, and user roles.

4 Migrating Data from OpenLab CDS EZChrom Edition

This chapter contains procedures for migrating data from OpenLab CDS EZChrom Edition Workstation to OpenLab CDS Workstation using the Migration Tools for OpenLab. The Migration Tools export raw and results data, shared services information, project information, instrument information, users/groups, and roles/privileges.

5 Post-Migration Data Verification

This chapter contains procedures for verifying the data and instrument information were migrated successfully.

6 Troubleshooting

This chapter provides information about some common errors that you may encounter while migrating data from OpenLab CDS ChemStation Edition or OpenLab CDS EZChrom Edition to OpenLab CDS 2 using the Migration Tools for OpenLab.

This page intentionally left blank.

Contents

1 Introduction 3

Migration Overview 4

2 Preparing for Migration 7

Planning the Migration 8

Site Preparation 9

Hardware Requirements 10

Migration Tools Compatibility 11

3 Migrating Data from ChemStation Edition and ChemStation B 13

Using the Migration Tools for OpenLab to Export Data from OpenLab CDS ChemStation Edition 14

Using the Migration Tools for OpenLab to Export Data from ChemStation B 32

Using the Migration Tools for OpenLab to Import Data 37

Run Migration Tools to import data as part of the OpenLab CDS installation 38

Using Migration Tools to import data after installation of OpenLab CDS 44

What happens when data are imported 50

4 Migrating Data from OpenLab CDS EZChrom Edition 53

Using the Migration Tools for OpenLab to Export Data from OpenLab CDS EZChrom Edition 54

Using the Migration Tools for OpenLab to Import Data 72

Running Migration Tools to import data as part of the OpenLab CDS installation 72

Running the Migration Tools from the OpenLab Installer 79

What happens when data are imported 87

5 Post-Migration Data Verification 91

Getting Started 92

Verifying Instruments 94

Verifying Projects 97

Verifying Users, Groups, and Roles 103

6 Troubleshooting 105

Migration Tools for OpenLab Issues 106

Migration Tools for OpenLab cannot launch due to .NET incompatibility 106
Migration Tools for OpenLab Planning page documentation cannot open 106

Export Issues 107

Export destination must be empty 107
No active instruments detected 107
Could not find a part of the path 107
Access to the path is denied 108
Access to export destination path is denied 108

Import Issues 109

A supported version of OpenLab CDS was not found 109
User authentication incorrectly set up 109
Export package descriptor file not found 109

1 Introduction

Migration Overview 4

This guide provides step-by-step instructions for migrating data, instrument information, and user information, from OpenLab CDS ChemStation Edition, ChemStation B, and OpenLab CDS EZChrom Edition to OpenLab CDS Workstation using the Migration Tools for OpenLab (Migration Tools).

This chapter provides an overview of the migration process using the Migration Tools for OpenLab.

For information on how to perform migrations without using the Migration Tools, and for information on how to migrate methods, see the Migration User Guide for your particular systems.

Migration Overview

The Migration Tools simplify the migration process by dividing it into the following three stages:

- Planning – Prepare for the migration by reading this guide and performing pre-migration setup.
- Export – Transfer the data from OpenLab CDS ChemStation Edition, ChemStation B, or OpenLab CDS EZChrom Edition to your export location.
- Import – For OpenLab CDS ChemStation or EZChrom Edition, transfers the data from the export location to OpenLab CDS project folders. For ChemStation B, transfers the data to a staging location. From there, you can load supported files into OpenLab CDS Workstation. When installing OpenLab CDS 2.4 or higher, setup and import of migration data happens as part of the installation procedure.

NOTE

The Migration Tools function differently for Export from OpenLab CDS ChemStation Edition, ChemStation B, and OpenLab CDS EZChrom Edition. Make sure to follow the instructions for the product you are using.

The following figure summarizes the export and import stages of the migration process for OpenLab CDS ChemStation and EZChrom Edition.

Run Migration Tools for OpenLab
Launch Migration Tools Export Utility

- Runs ChemStation or EZChrom Analysis
- Verifies projects (EZChrom)
- Verifies Users and Groups
- Verifies Roles
- Verifies Instruments
- Set Data and Export locations
- Checks file size for configuration and result data export
- Starts export
- Completes export

Launch Migration Tools Import Utility from CDS 2 Installer

- Select export location
- Create staging location
- Set default password (if needed)
- Start import
- Complete import

Verify imported data

Figure 1. Data migration workflow overview

This document also provides the following information to help you complete and verify the migration successfully:

- Post-Migration Data Verification – provides information on checklist and tasks after the migration tool has transferred the data.
- Troubleshooting – lists error messages and possible solutions.

2 Preparing for Migration

Planning the Migration 8
Site Preparation 9
Hardware Requirements 10
Migration Tools Compatibility 11

This chapter provides information about the pre-migration setup. Once you complete the pre-migration setup, go to the appropriate chapter for instructions on how to migrate data for your system:

Chapter 3, "Migrating Data from ChemStation Edition and ChemStation B," starting on page 13

Chapter 4, "Migrating Data from OpenLab CDS EZChrom Edition," starting on page 53

Planning the Migration

Planning is the first step to ensure that you have what you need to successfully migrate your data using the Migration Tool. Review the following sections to prepare for data migration.

- **"Site Preparation"**
- **"Hardware Requirements"**
- **"Migration Tools Compatibility"**

Site Preparation

Before starting the migration, make a note of the connected instruments and drivers on the source OpenLab CDS (ChemStation or EZChrom Edition.)

Refer to the *OpenLab CDS Requirements Guide*, the firmware guide, and the driver release notes to confirm compatibility and supportability with the OpenLab CDS system, and update firmware, if needed.

NOTE

You cannot make configuration changes, such as IP address, during the migration.

Hardware Requirements

Ensure that you are compliant to the following hardware requirements:

- Export destination - USB drive or network location with enough capacity to transfer the exported data and results from the OpenLab CDS ChemStation Edition, ChemStation B, or OpenLab CDS EZChrom Edition to OpenLab CDS version 2.x.
  - When using a shared network location, it is recommended that you export to a local location first, copy the export package to the shared location, then copy the data to a local drive on the import machine.
- Import PC - Memory and disk space must satisfy the requirements in the OpenLabCDSRequirements.pdf available with OpenLab CDS version 2. Make sure there is at least enough disk space to hold over two times the data that are currently found within the default data location in your OpenLab CDS ChemStation Edition or ChemStation B (usually C:\Chem32) or OpenLab CDS EZChrom Edition.

Notes for in-place (single-computer) migration of OpenLab CDS ChemStation Edition or OpenLab CDS EZChrom Edition

After using the Migration Tools to export the OpenLab CDS ChemStation Edition or EZChrom Edition files, you must uninstall OpenLab CDS ChemStation Edition or EZChrom Edition, and make sure the computer meets all the hardware and software requirements for OpenLab CDS version 2.x before proceeding.

NOTE

Make sure your OpenLab CDS ChemStation Edition or EZChrom Edition is completely uninstalled. Contact Agilent technical support and refer to software removal documentation and follow the instructions to make sure all files are properly removed.

Migration Tools Compatibility

Ensure that the source and target machines are compatible with the Migration Tools for OpenLab:

OpenLab CDS ChemStation Edition (source)

- OpenLab CDS ChemStation Edition Workstation only.
- OpenLab CDS ChemStation Edition C.01.05, C.01.06, and C.01.07 SR1, SR2, SR3.
- File system only (Data Analysis add-on not supported).
- For domain authentication, single domain only is supported.
- When using domain authentication, the target machine must be in the same single domain as the source machine.

ChemStation B (source)

- ChemStation B.04.03 SP2.
- Workstation only.
- Data to be migrated must reside in either the default C:\Chem32 folder or in a \Chem32 folder in a separate location defined using the Preferences feature of ChemStation.

OpenLab CDS EZChrom Edition (source)

- OpenLab CDS EZChrom Edition A.04.06 and A.04.07, and A.04.07 SR1 and SR2 Workstation only.
- File system only, including AFS (Data Analysis add-on not supported).
- For domain authentication, single domain only is supported.
- When using domain authentication, the target machine must be in the same single domain as the source machine.

OpenLab CDS (target)

- File system only (OpenLab CDS Workstation version 2.1, 2.2, 2.3, 2.4)
- Do not configure authentication on initial installation- this is configured by the Migration Tool.

- When using domain authentication, the target machine must be in the same single domain as the source machine.

3 Migrating Data from ChemStation Edition and ChemStation B

Using the Migration Tools for OpenLab to Export Data from OpenLab CDS ChemStation Edition 14
Using the Migration Tools for OpenLab to Export Data from ChemStation B 32
Using the Migration Tools for OpenLab to Import Data 37

This chapter contains procedures for migrating data from OpenLab CDS ChemStation Edition or ChemStation B to OpenLab CDS Workstation using the Migration Tools for OpenLab. The Migration Tools export raw and results data, shared services information, instrument configuration, and user roles.

For information on how to migrate data from OpenLab CDS EZChrom Edition, see **Chapter 4**, “Migrating Data from OpenLab CDS EZChrom Edition,” starting on page 53.

Using the Migration Tools for OpenLab to Export Data from OpenLab CDS ChemStation Edition

Use the following procedure to export data from your OpenLab CDS ChemStation Edition to an export location (USB drive or network location). If you are using ChemStation B, see **"Using the Migration Tools for OpenLab to Export Data from ChemStation B"** on page 32.

1 On your OpenLab ChemStation Edition machine, insert the OpenLab CDS Workstation version 2.x USB media, right-click the setup.exe file, and run it as administrator. This starts the OpenLab CDS Installer.

2 In the OpenLab Installer navigator, click **Migration**.

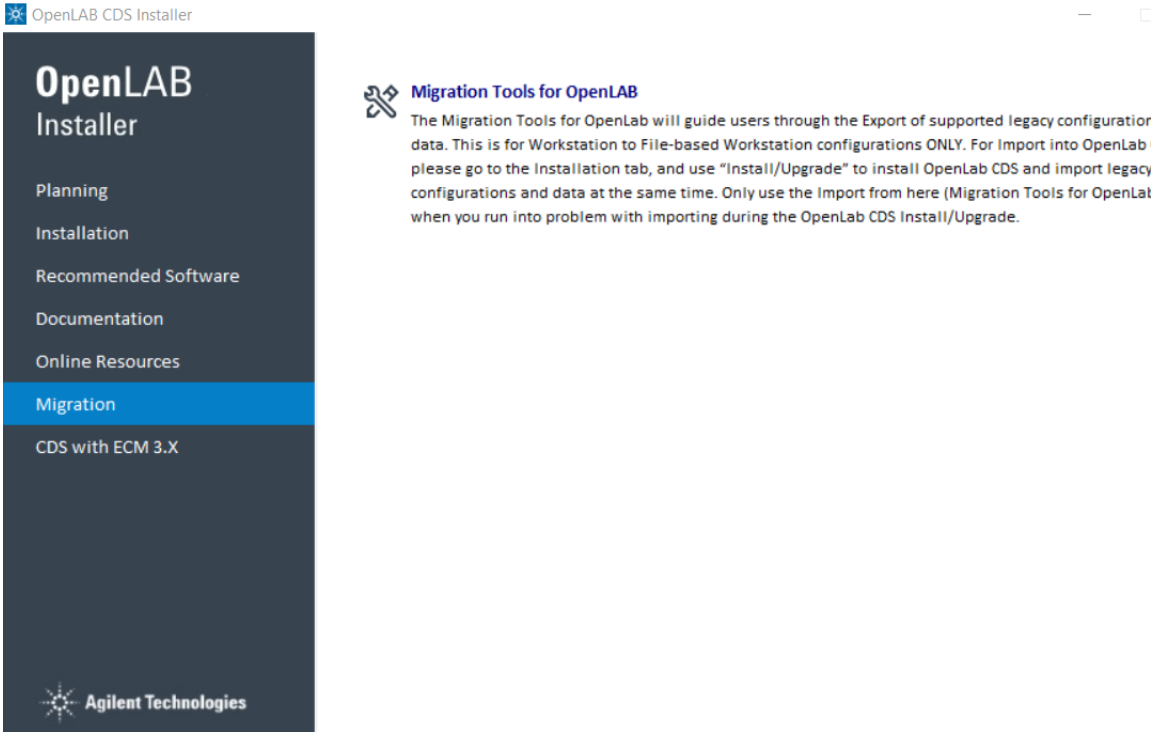


Figure 2. Migration Tools selection from the OpenLab CDS installer

3 Select **Migration Tools for OpenLab**. The Migration Tools for OpenLab opens.

4 On the left navigation pane, click **Export**. The OpenLab CDS ChemStation Export Utility button is displayed.

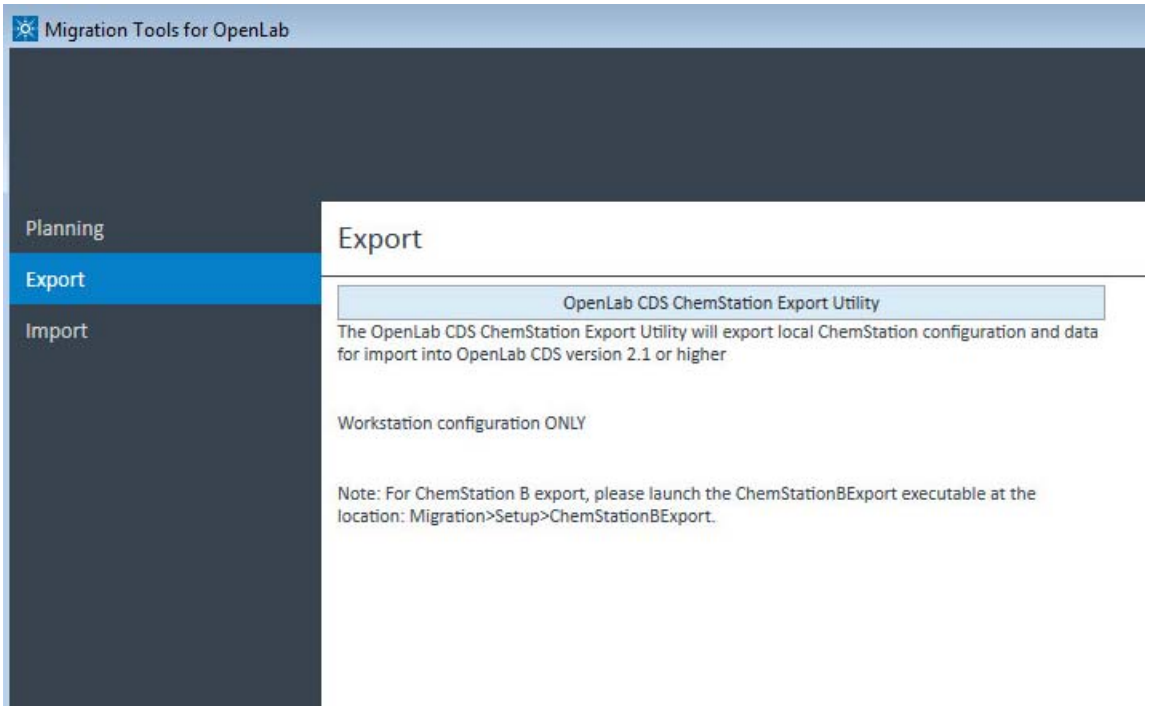


Figure 3. Migration Tools - Export tab

5 Click **OpenLab CDS ChemStation Export Utility** to launch the Export Utility.

6 If you see a pop-up security warning, click **Run** on the pop-up screen.

The ChemStation Analysis window opens and automatically analyzes the version number of the ChemStation to ensure that it is C.01.05, C.0106, or C01.07. If a version other than C.01.05, C.0106, or C01.07 is detected, an error is displayed.

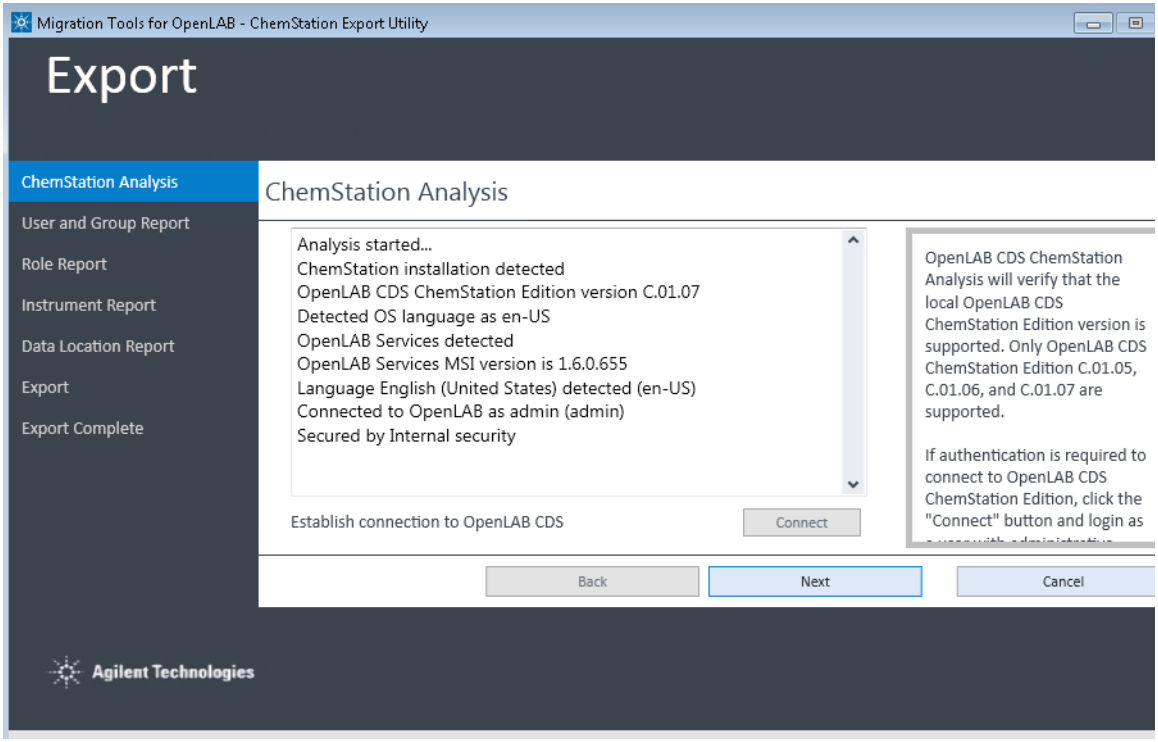


Figure 4. Export Utility - ChemStation Analysis

Once the version is verified, if authentication is required for OpenLab CDS ChemStation Edition, the OpenLab Control Panel login window appears. (See **Figure 5**.)

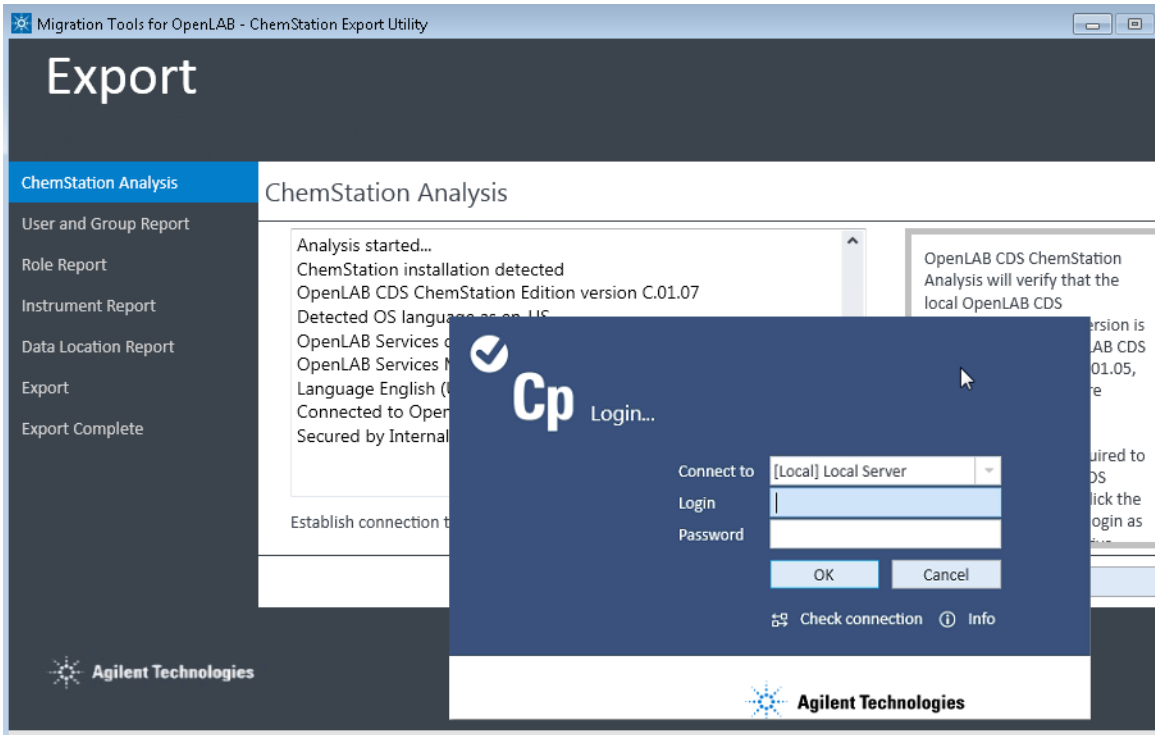


Figure 5. Export Utility - Login to shared services

7 In the login pop-up window, log into OpenLab CDS ChemStation Edition by completing the following fields, then click **OK**.

- **Connect to** — Local Server is selected by default.
- **Login** — Type the username of the system administrative account for OpenLab CDS ChemStation Edition. This enables the tool to authenticate and retrieve data from OpenLab CDS ChemStation Edition.
- **Password** — Type the password for the system administrative account entered in the Login field.

- **Domain** — If using Windows Domain authentication, select the user's domain. (This does not appear if Windows Domain authentication is not being used for OpenLab CDS ChemStation Edition.)

8 On the **ChemStation Analysis** screen, click **Connect** to re-attempt connection, if needed. Otherwise, click **Next**.

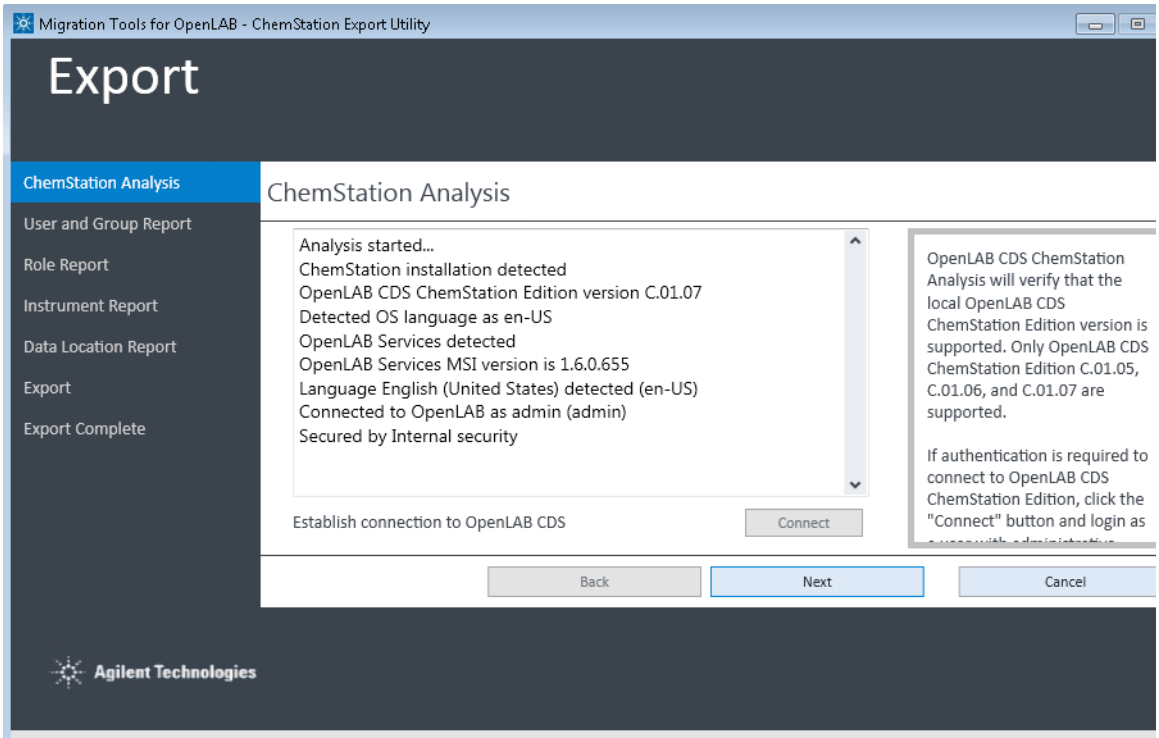


Figure 6. Export Utility - ChemStation Analysis

The Users and Group Report screen appears (**Figure 7**.)

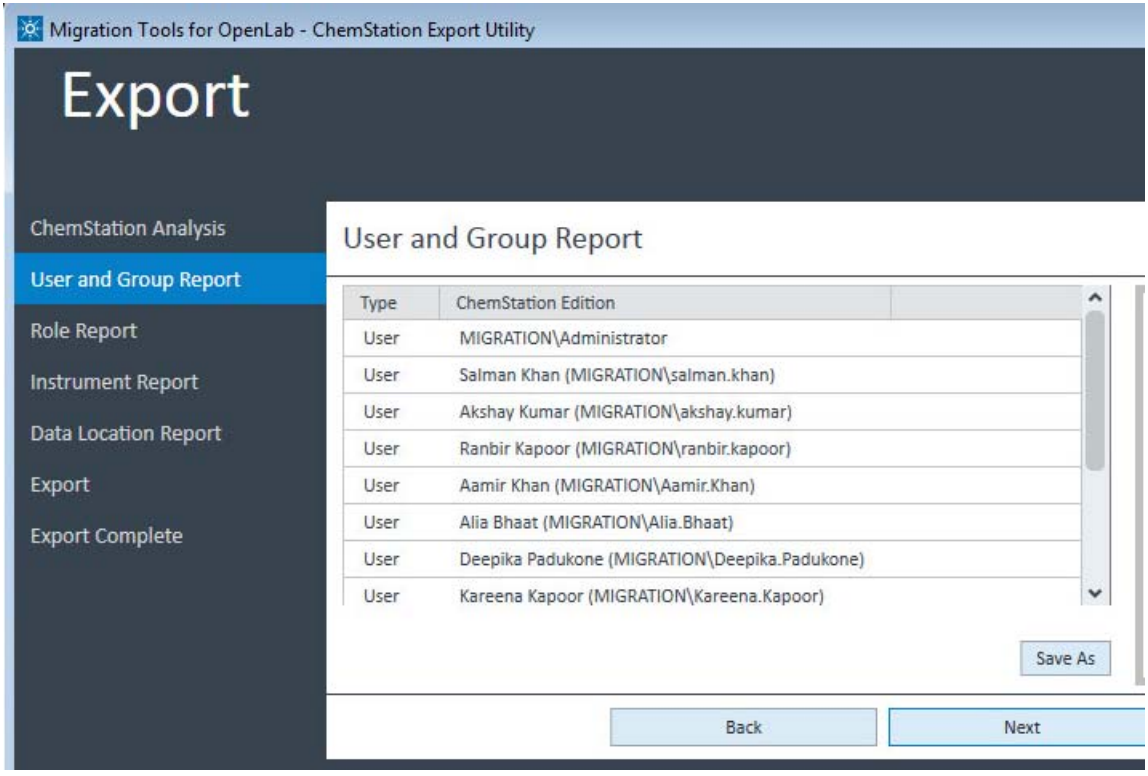


Figure 7. Export Utility - User and Group Report

For Windows Local Security

If you are using Windows Local security on OpenLab CDS ChemStation Edition, the User and Group Report will have a different appearance because OpenLab CDS version 2.x does not support Windows Local security. (See **Figure 8**.)

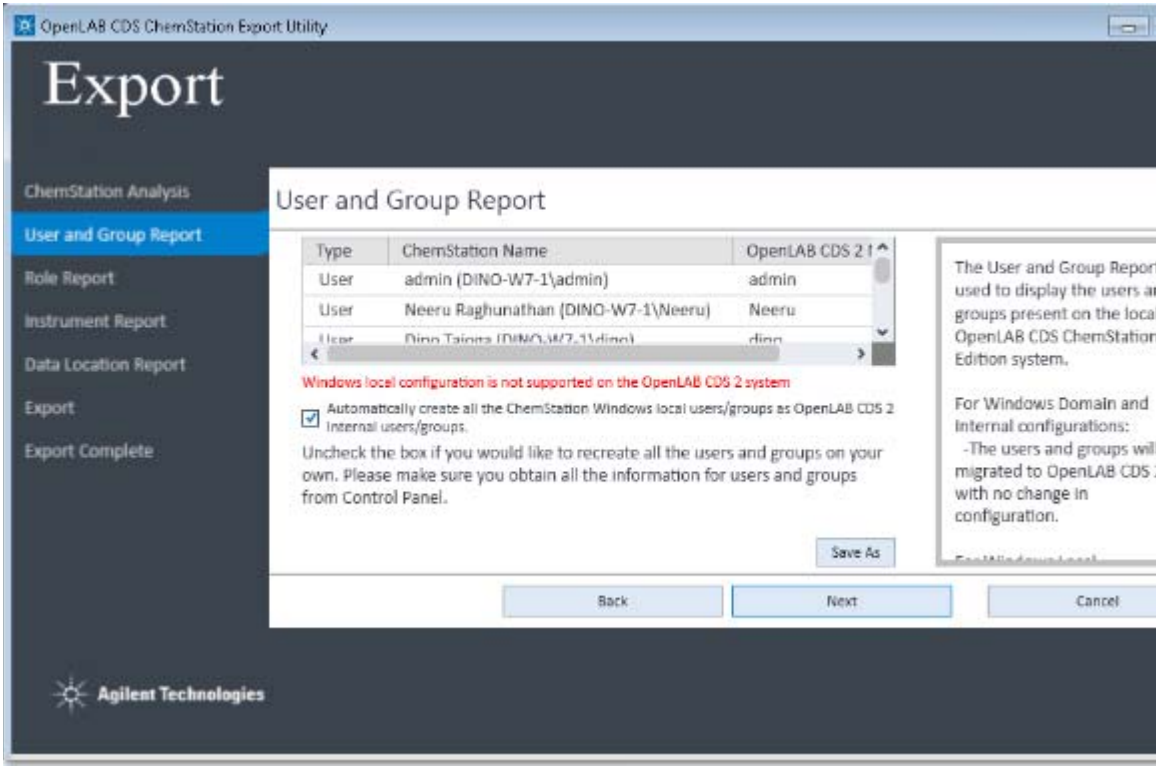


Figure 8. User and Group Report with Windows Local configuration

Select the checkbox to automatically create all the OpenLab CDS ChemStation Edition Windows local users and groups as OpenLab CDS version 2.x Internal users and groups.

Clear the checkbox to enable you to manually recreate all the users and groups later from within OpenLab CDS version 2.x. (Make sure you have obtained all the user and group information from the OpenLab CDS ChemStation Edition Control Panel if you choose this option.)

9 Review the users and groups to export. If desired, click **Save As** to browse to a location and save the list as html file. (Note that the list is automatically saved when export is completed.)

10 Click **Next**.

The Role Report screen appears, which displays all the roles that the tool has detected, along with the mapped role for OpenLab CDS 2.x (**Figure 9**).

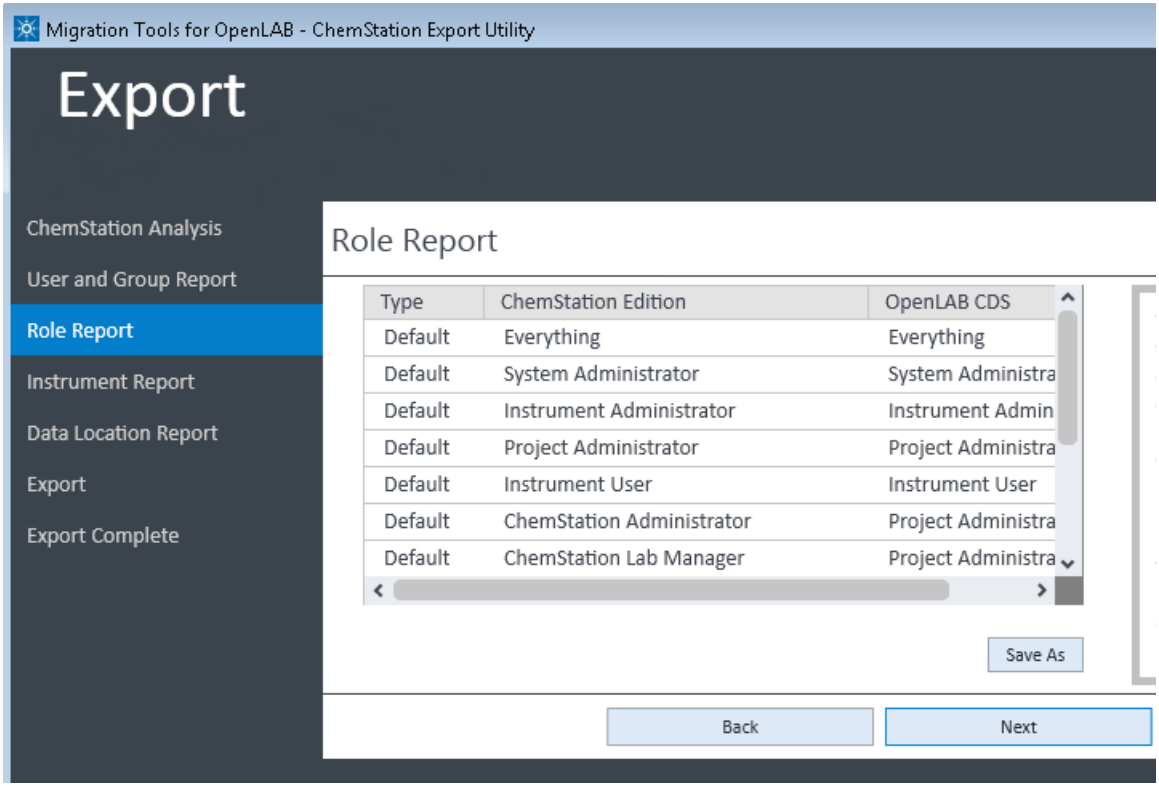


Figure 9. Export Utility - Role Report

11 Click **Save As** to save the roles information as an HTML page. Otherwise, click **Next**.

The Instrument Report screen displays the instruments that are connected to the OpenLab CDS ChemStation Edition, and are active, as shown in **Figure 10**.

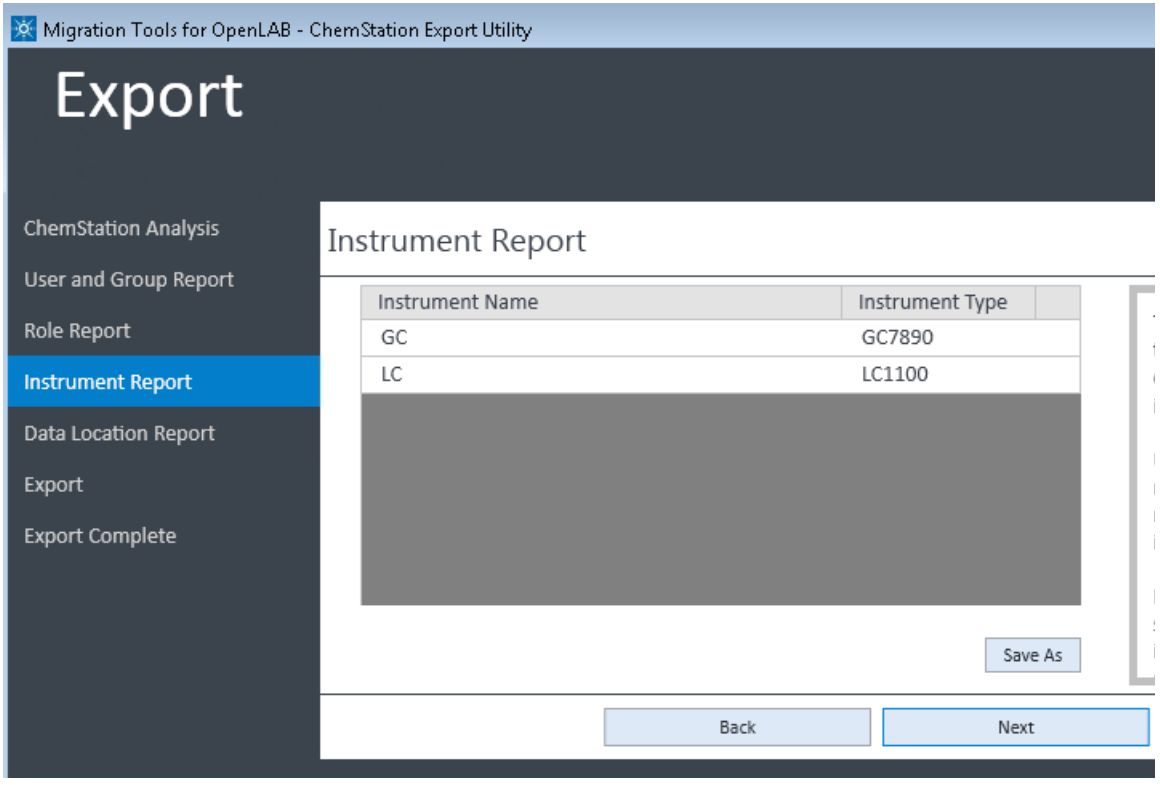


Figure 10. Export Utility - Instrument Report

12 If desired, click **Save As** to save the Instrument Report as an HTML file. Otherwise, click **Next.**

The Data Location screen appears. All locations from which data will be migrated are displayed, and are selected by default.

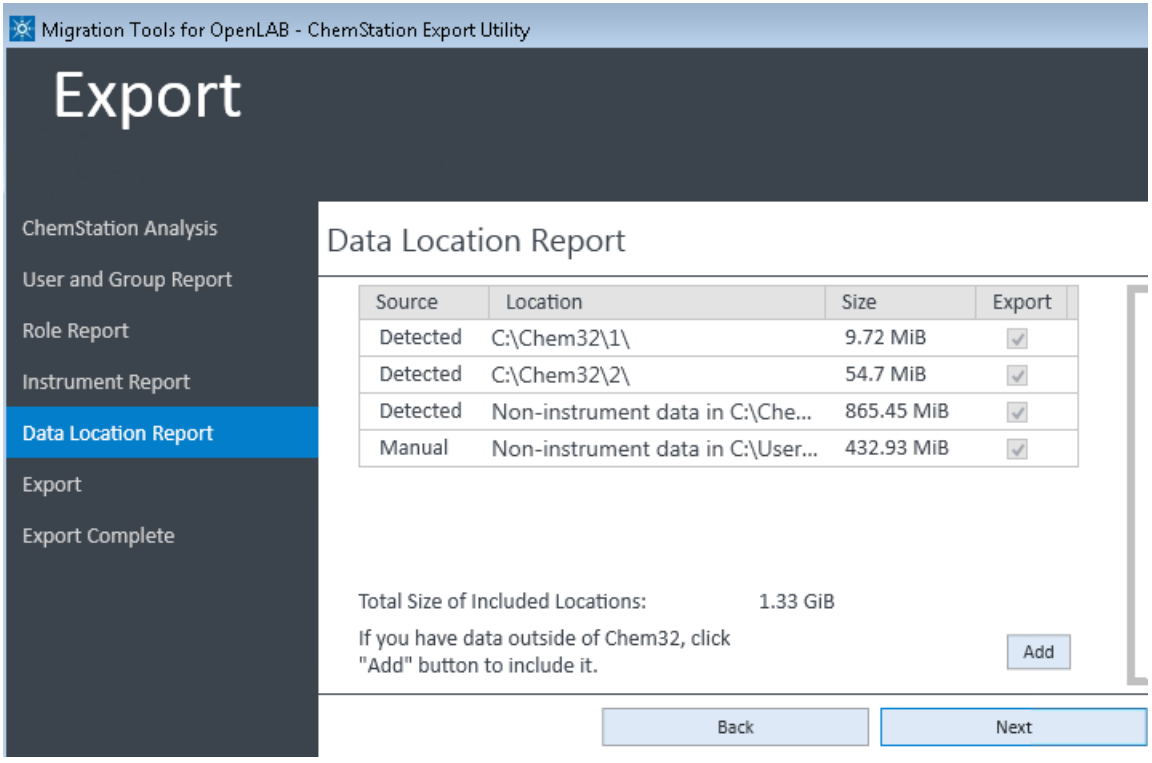


Figure 11. Export Utility- Data Location Report

13 To add an export location outside of the Chem32 folder, click **Add**, then browse to the location and select it to add the location to the table.

14 Click **Next**.

The Data and Configuration Export screen enables you to select the export destination (**Figure 12**). The tool determines and displays the amount of disk space used by the result and system configuration data.

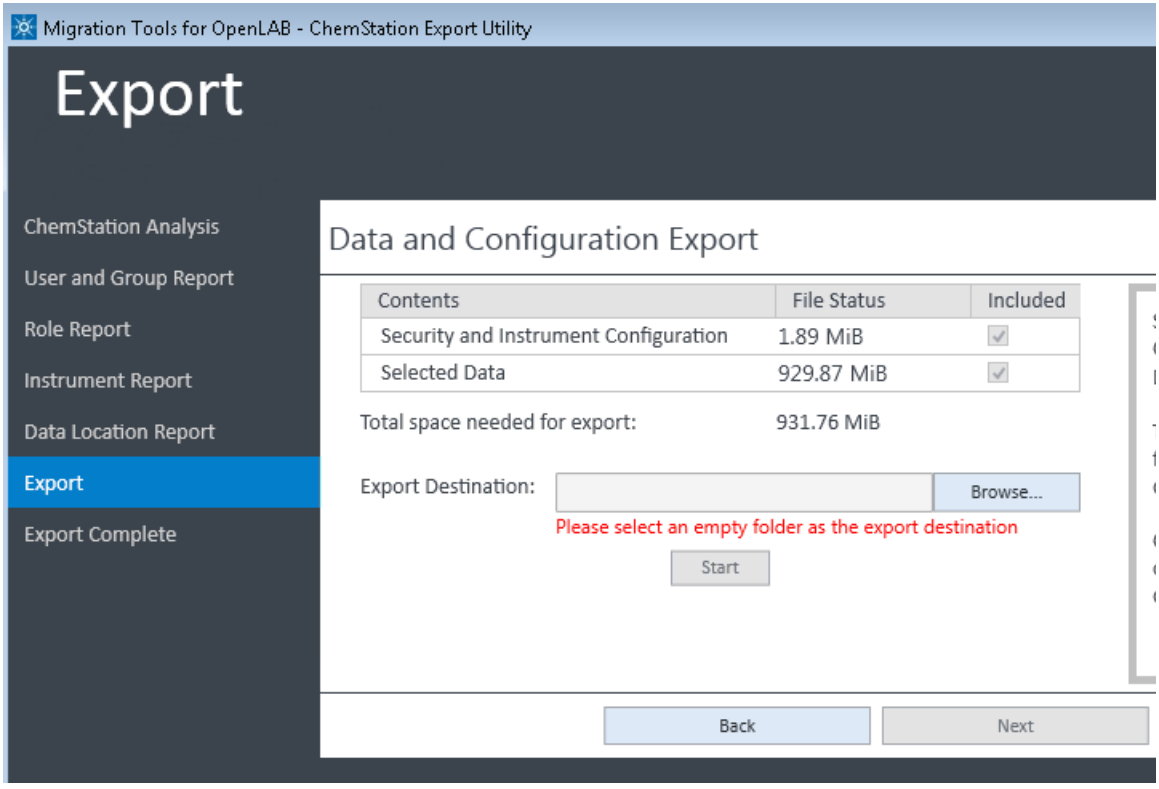


Figure 12. Export Utility - Data and Configuration Export

15 The system analyzes the file size for the current system configuration data and result data, and displays this in a table. The following items are included in the export:

- **Security and Instrument Configuration** – This is the OpenLab shared services configuration data, such as the administrative information.
- **Selected Data** – The ChemStation Data is included in the export package.

16 The **Export Destination** field is the destination folder where the OpenLab CDS ChemStation Edition files will be exported. Click **Browse** and then click **Make**

New Folder to create an empty folder in your export location, as shown Figure 13.

NOTE

The export destination folder selected must be empty.

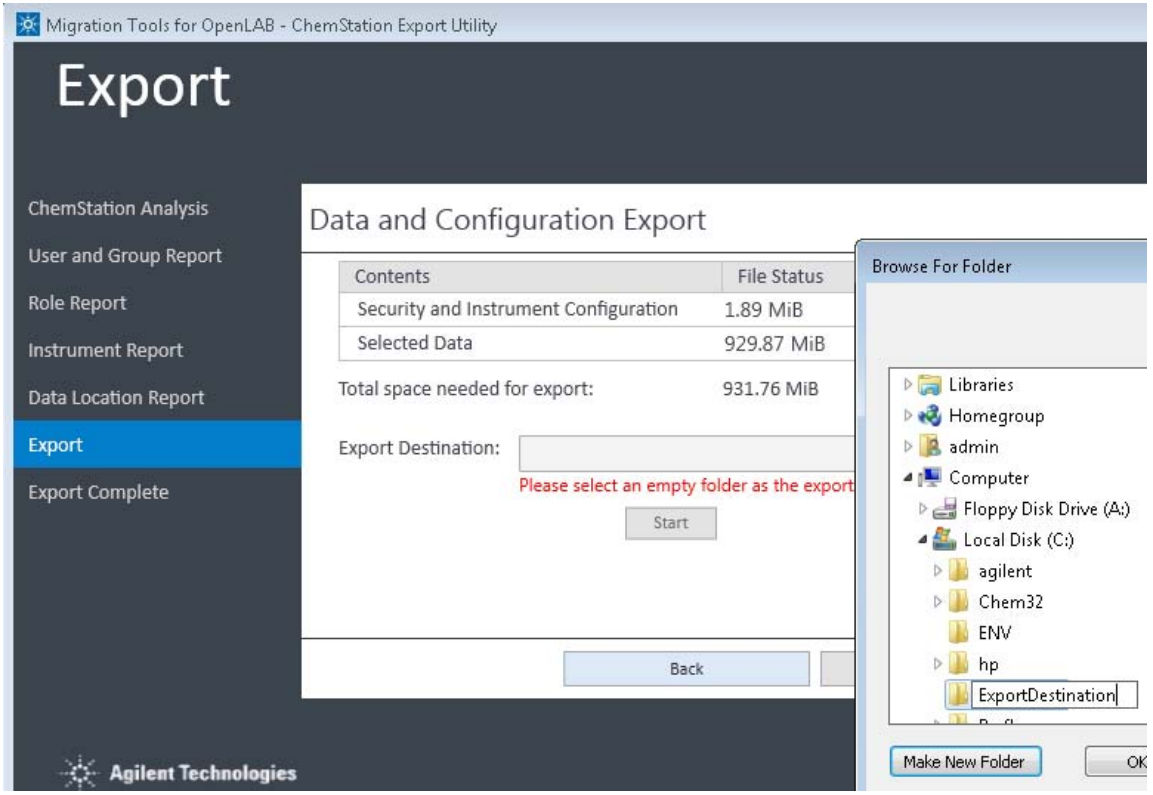


Figure 13. Export Utility - creating an export folder

The Start button is enabled once the Export Destination is ready.

17 Click **Start** to begin the export process. The status bar displays indicates the export is in process (**Figure 14**), and the File Status changes from "Exporting" to "Done" upon completion.

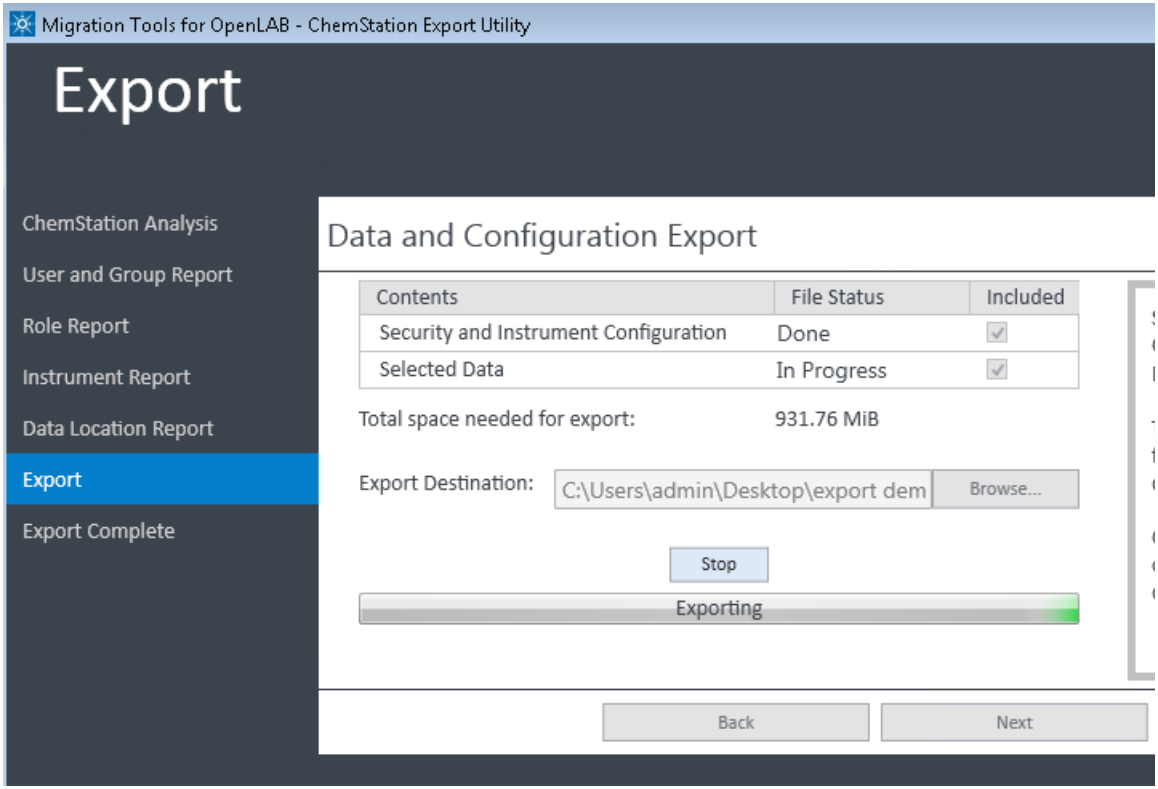
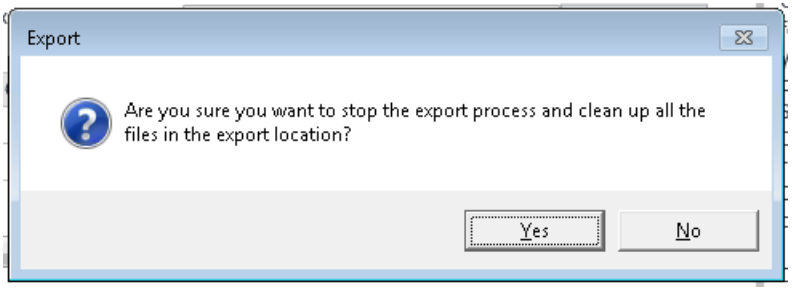


Figure 14. Export Utility - export in progress showing File Status

If you need to halt the export, click **Stop**. A pop-up message will ask you to confirm your decision. The export process continues while the message is showing.



- If you click **Yes**, the export process stops and all the files in the export destination are cleaned up.
- If you click **No**, the message disappears, and the export process continues.

When the export completes, the Stop button and the progress bar disappear, and you see the following message “The export has completed”, as shown in **Figure 15**.

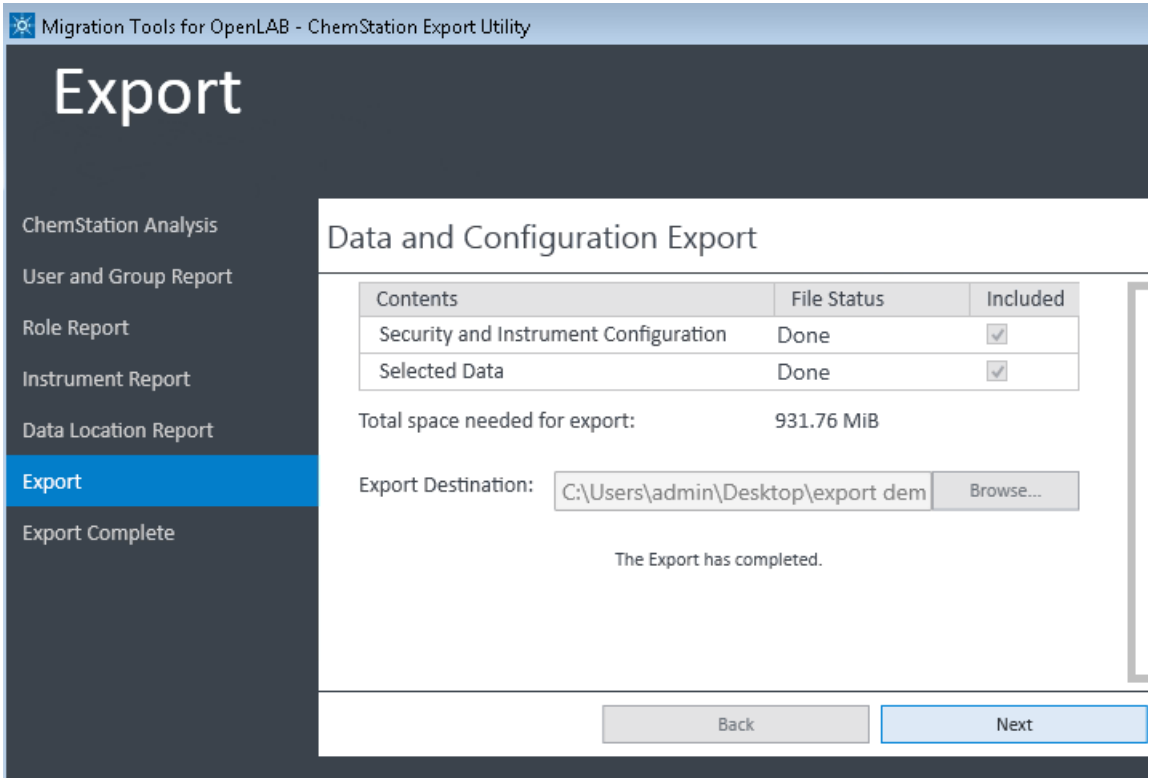


Figure 15. Export Utility - Export completed

18 Click **Next** to get a confirmation of the success.

19 Click **Finish** to complete the export process. The migration tool exits.

At this point, you have successfully exported data from OpenLab CDS ChemStation Edition to your export device. You can now proceed to Import your data to OpenLab CDS version 2. See **"Using the Migration Tools for OpenLab to Import Data"** on page 37.

The export files are located in the `AgilentExport` folder in the export location you selected, as shown in **Figure 16**.

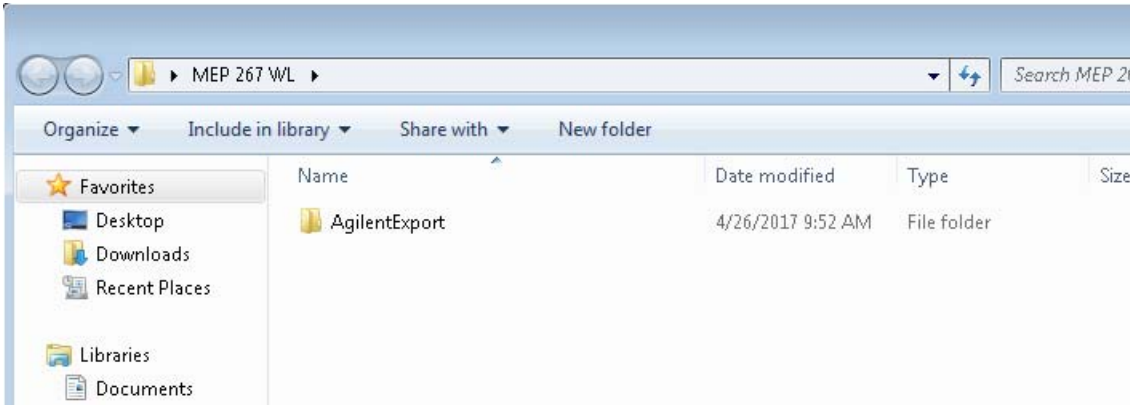


Figure 16. Export folder created by Migration Tools export

Figure 17 displays the contents of the `AgilentExport` folder.

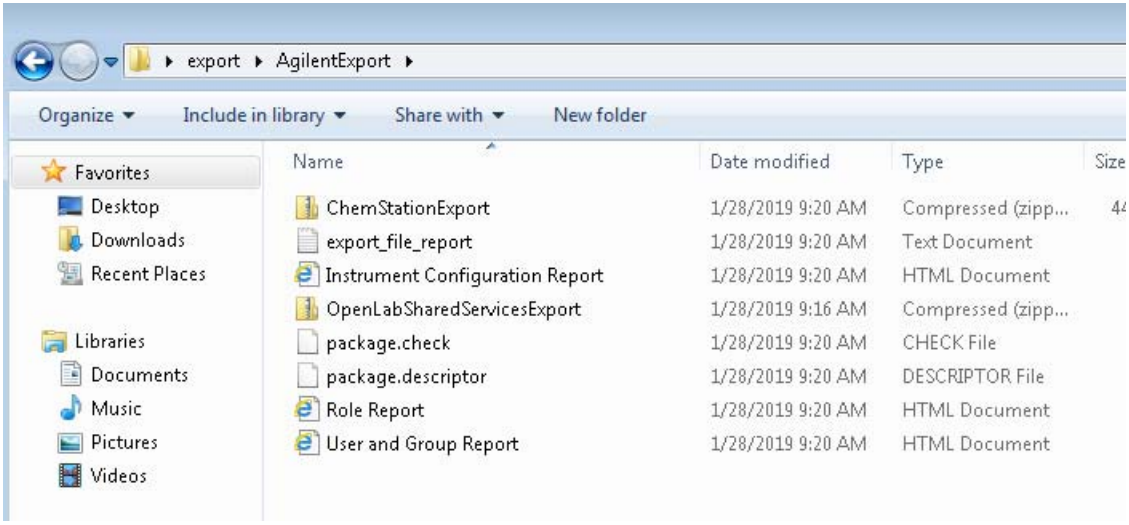


Figure 17. Contents of the AgilentExport folder

- ChemStationExport — zip package containing the ChemStation data.
- export_file_report — file details the export activities. Specifically, it lists all the files that are included in the OpenLab CDS ChemStation Edition export that are in the ChemStation Export zip package.
- Instrument Configuration Report — HTML file with instrument information.
- OpenLabSharedServicesExport — zip package containing the OpenLab Shared Services data, such as security, authentication, roles, administration information, and instrument configuration.
- package.check — This file is read during import to make sure the export package has not been modified in any way.
- package.descriptor – XML file containing details of the mapping to the import.
- Role Report — HTML file with user role information.
- User and Group Report — HTML file with users and groups.

NOTE

Do not modify these files. They are used by the Import function of the Migration Tools for OpenLab.

NOTE

If you are using Windows local users (unsupported in OpenLab CDS 2), and intend to recreate the new users as OLSS internal users in OpenLab CDS version 2, make sure to obtain all the Users and Groups information from the OpenLab CDS ChemStation Edition Control Panel. The "User's and Group's Role Assignment Report" from Control Panel could be used as a reference.

Using the Migration Tools for OpenLab to Export Data from ChemStation B

ChemStation B uses a special version of the Migration Tool, which is located on the OpenLab CDS Workstation installation USB flash drive.

1. On the computer where your ChemStation B is installed, insert the OpenLab CDS version 2.x installation media USB drive, and migrate to the OpenLab CDS Migration Tools at **OpenLabCDS-2.x.\setup\tools\migration\setup\chemstationBexport.exe**.
2. Double-click **chemstationBexport.exe** to start the program.

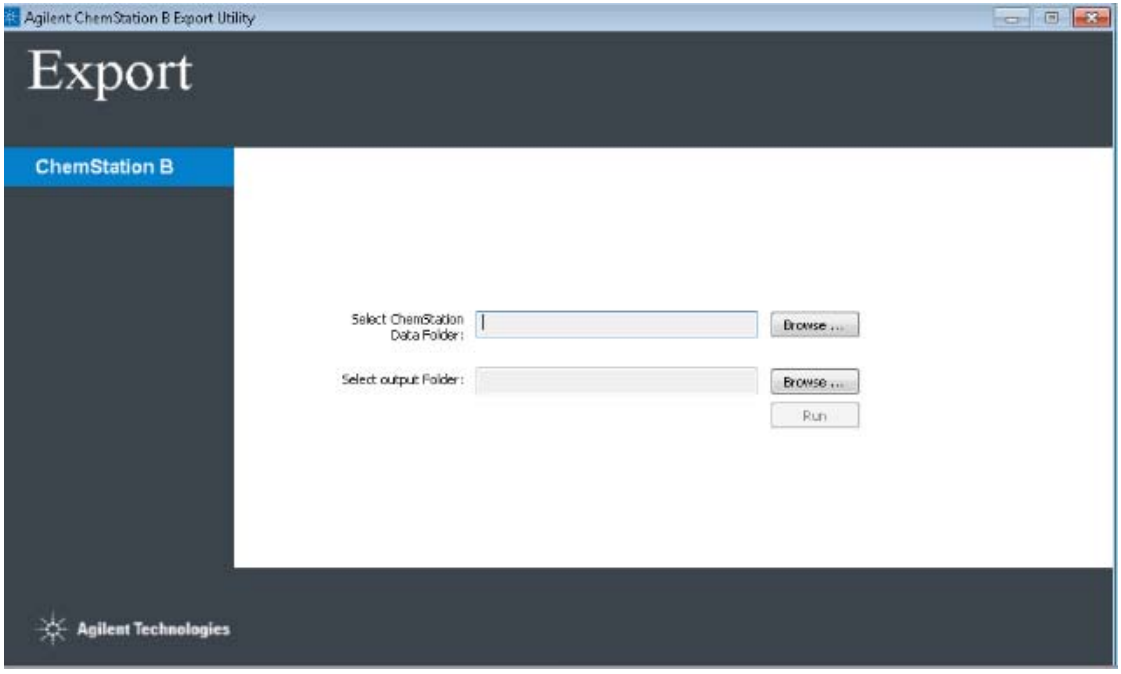


Figure 18. ChemStation B Export

3 Next to Select ChemStation Data Folder, click **Browse** and then browse to and select the location (usually C:\Chem32) where your ChemStation B data is located.

4 Next to the Select Output Folder, click **Browse.** Browse to the destination folder where you want to export the ChemStation B files (an external USB hard drive, for example). Click **Make New Folder** to create an empty folder in your export location (**Figure 19**.)

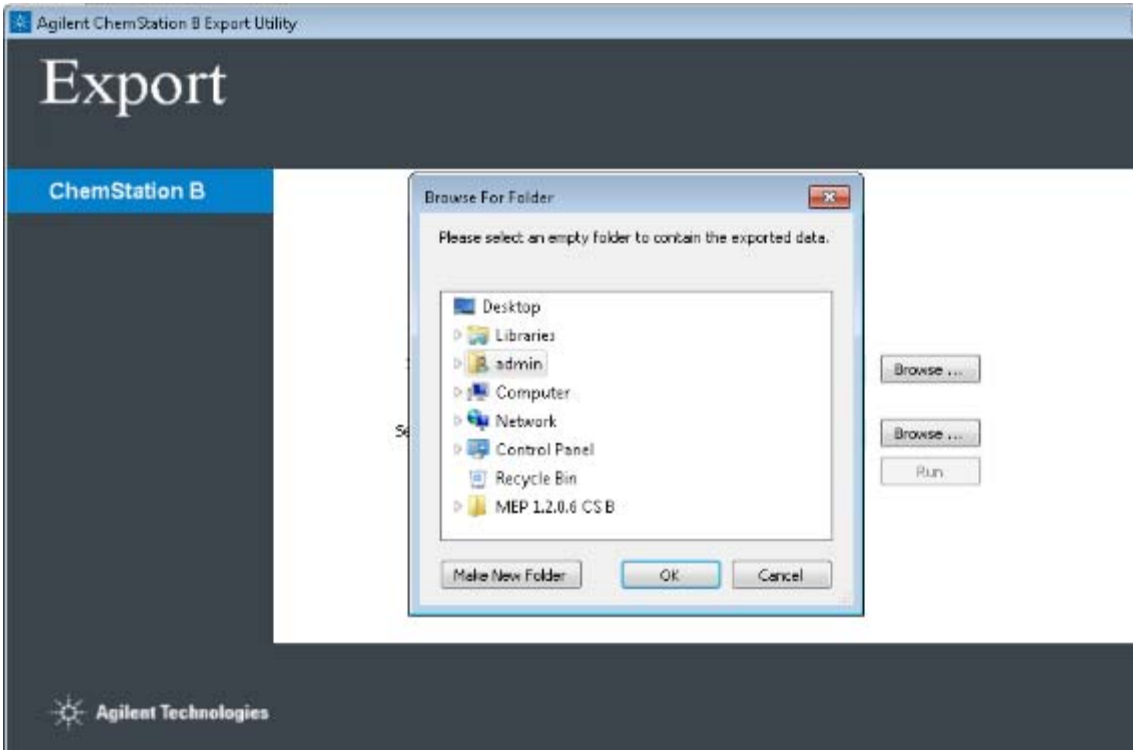


Figure 19. Create empty folder in export location for your ChemStation B export files

5 Click **OK**.

6 Once the ChemStation B data folder and output folder are selected, click **Run** to start the export.

The progress of the export is indicated in the progress bar shown in **Figure 20**.

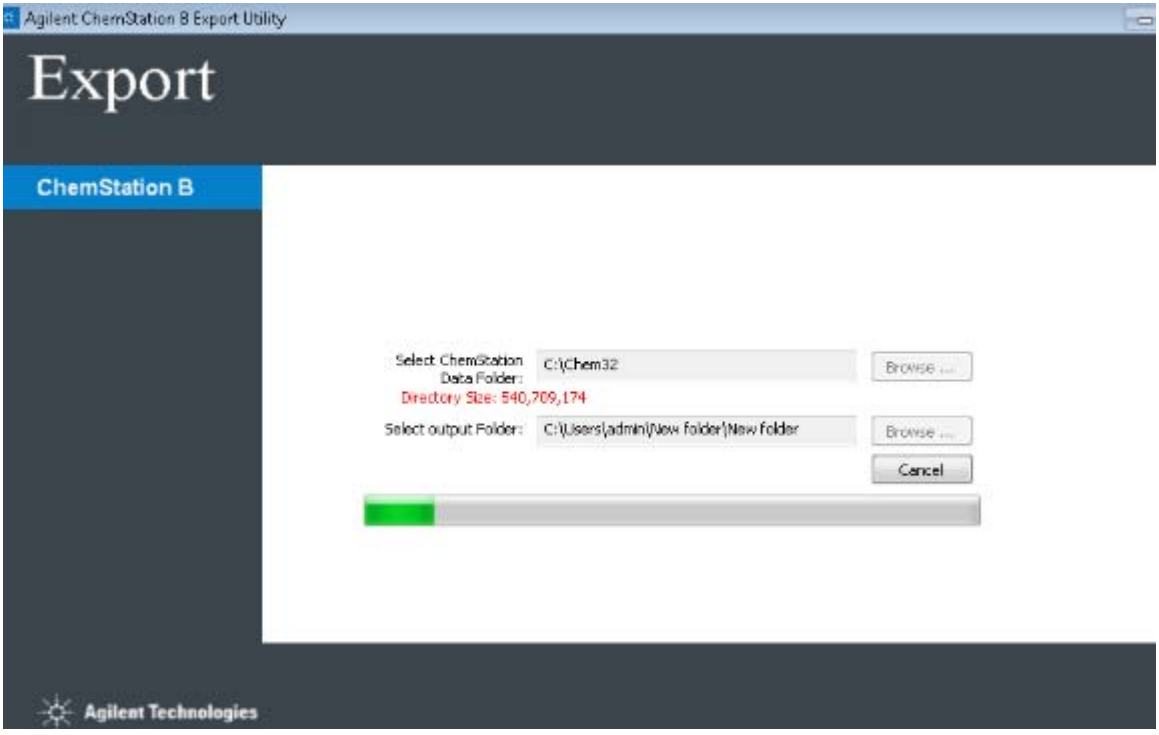


Figure 20. Export of ChemStation B in progress

7 When the export is completed, a message appears. Click **OK**.

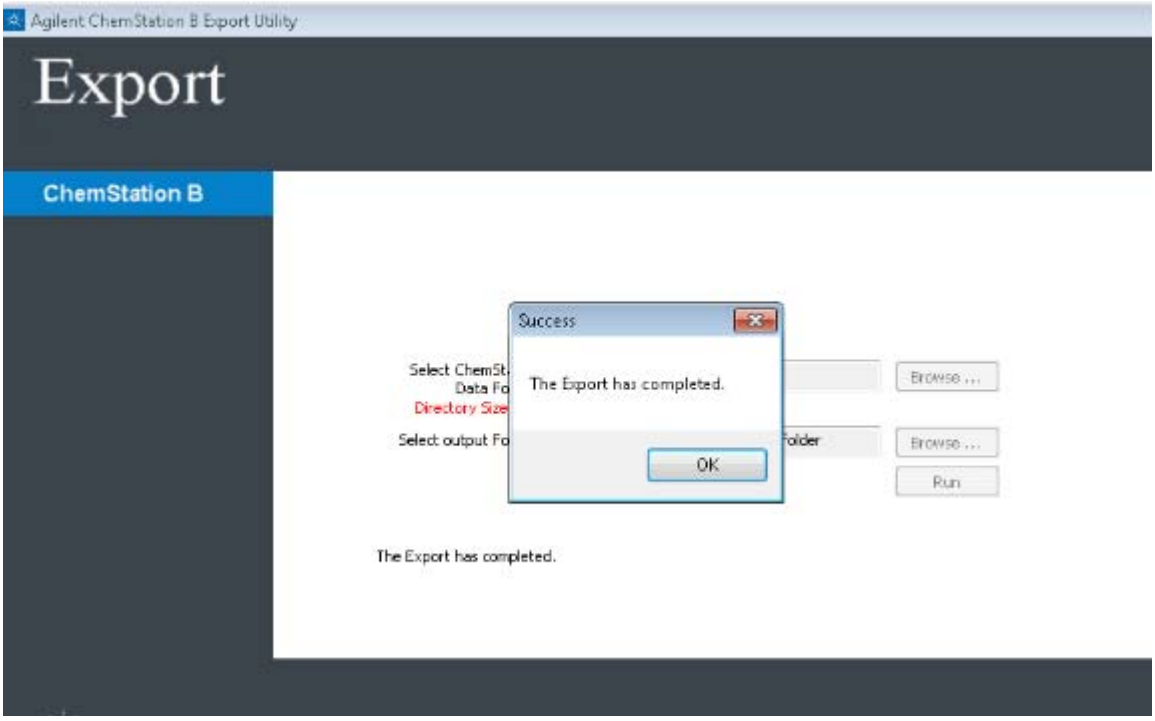


Figure 21. ChemStation B export completed

The export of your ChemStation B data is now complete, and is located in an AgilentExport folder in the export location you designated.

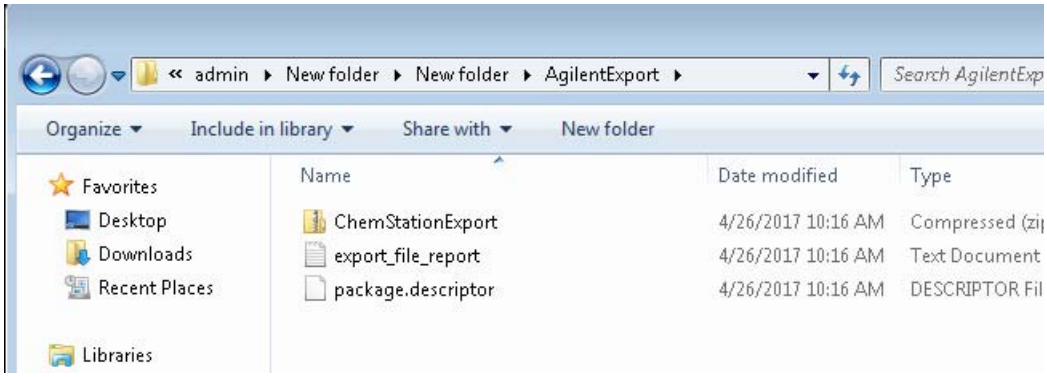


Figure 22. Contents of AgilentExport folder for ChemStation B

- ChemStationExport — zip package containing the ChemStation data.
- export_file_report — file details the export activities. Specifically, it lists all the files that are included in the ChemStation Export zip package.
- package.descriptor – XML file containing details of the mapping to the import.

NOTE

Do not modify these files. They are used by the Import function of the Migration Tools for OpenLab.

You can now proceed to import the files to OpenLab CDS version 2, using the steps described in "Using the Migration Tool for OpenLab to Import Data" on page 40.

Using the Migration Tools for OpenLab to Import Data

Once you have used the Migration Tools to export your data from the OpenLab CDS ChemStation Edition or ChemStation B, you will use the Migration Tools to import the data into your OpenLab CDS Workstation version 2.x. Importing the exported data is normally done as part of the installation of the OpenLab CDS 2 software.

NOTE

If migration is being performed in-place (on a single computer), you must uninstall OpenLab CDS ChemStation Edition and make sure the computer meets all the requirements before you install OpenLab CDS Workstation version and import using the Migration Tools.

NOTE

If the export package was created with OpenLab CDS ChemStation Edition, the extracted files that were loaded into projects in OpenLab CDS are removed from the staging location at the end of the import process. If the export package was created with ChemStation B, the extracted files in the staging location will remain. Always create a backup of the files to be migrated before starting the import process.

Run Migration Tools to import data as part of the OpenLab CDS installation

1 On the OpenLab CDS Workstation computer, insert the OpenLab CDS Workstation version 2.x USB drive, right-click the setup.exe file, and run it as administrator.

2 From the drop-down menu, select **OpenLab CDS** and then click **OK**. This starts the OpenLab CDS Installer. This opens the Installer Navigator - it does not actually begin the installation.

3 Install OpenLab CDS Workstation according to the directions in the OpenLab CDS Workstation User Guide.

   a Do not select 'Secure 'Projects Root Path'.

   b Set Authentication to “none.”

   c Do not configure the system at this point.

NOTE

If you have already installed OpenLab CDS, you can run the Migration Tools from the OpenLab CDS Installer menu, provided it has not yet been configured (or Authentication set to “None”.) Use the instructions in “Running the Migration Tools from the OpenLab Installer” on page 46.

4 When the installer presents the Migration Settings, select the **Migrate Database** box. Fields appear for Export Packaging Location and Staging Location (**Figure 23**.)

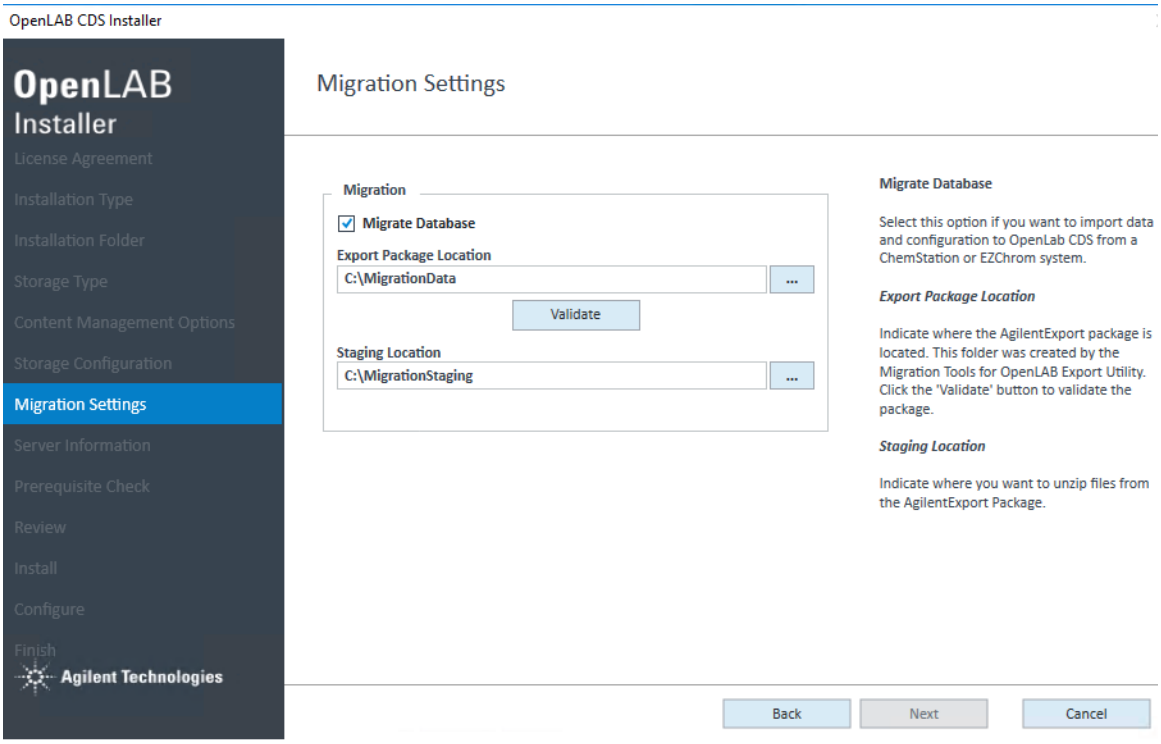


Figure 23. Migration Settings

5 Next to the Export Package Location, click ... and then browse to and select the folder where the AgilentExport package is located. (This is the folder containing the exported files created when you ran the Migration Tools to export your data.) (See **Figure 16** on page 29.)

6 Click **Validate** to verify the location and validate that it contains the export package.

7 Next to the Staging Location, click ... . Browse to a location on your local drive and select a folder. Or, create a folder to use as a staging location for the import data (**Figure 24**).

NOTE

The Staging Location folder must be empty.

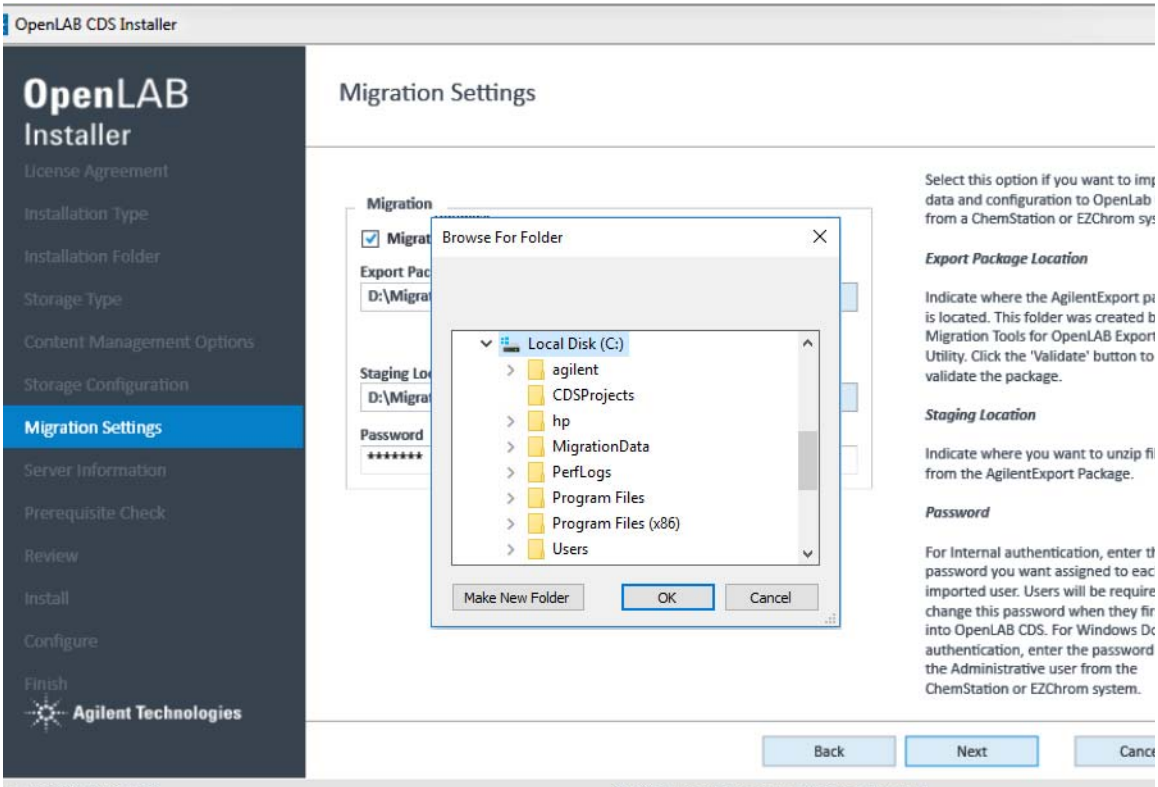


Figure 24. Create a folder for your Staging Location

8 If the installer determines that a password is necessary, the Password field will appear. For Internal authentication, type a password to be assigned to each imported user. (**Figure 25**) Users will be required to change this password the first time they log into OpenLab CDS. For Windows Domain authentication, type the password for the Administrative user from the ChemStation system.

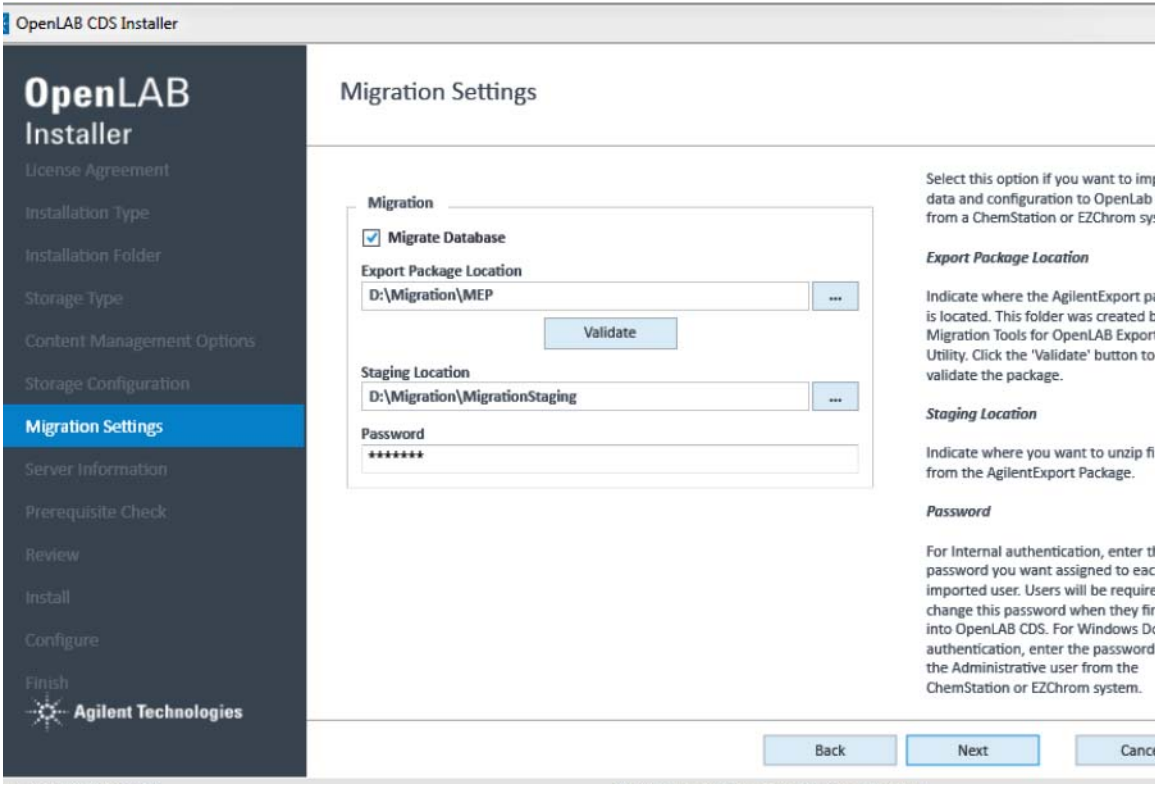


Figure 25. Setting a password

9 Click **Next** to continue and complete the installation. At the end of the installation procedure, successful importation of the data will be indicated as shown in **Figure 26.**

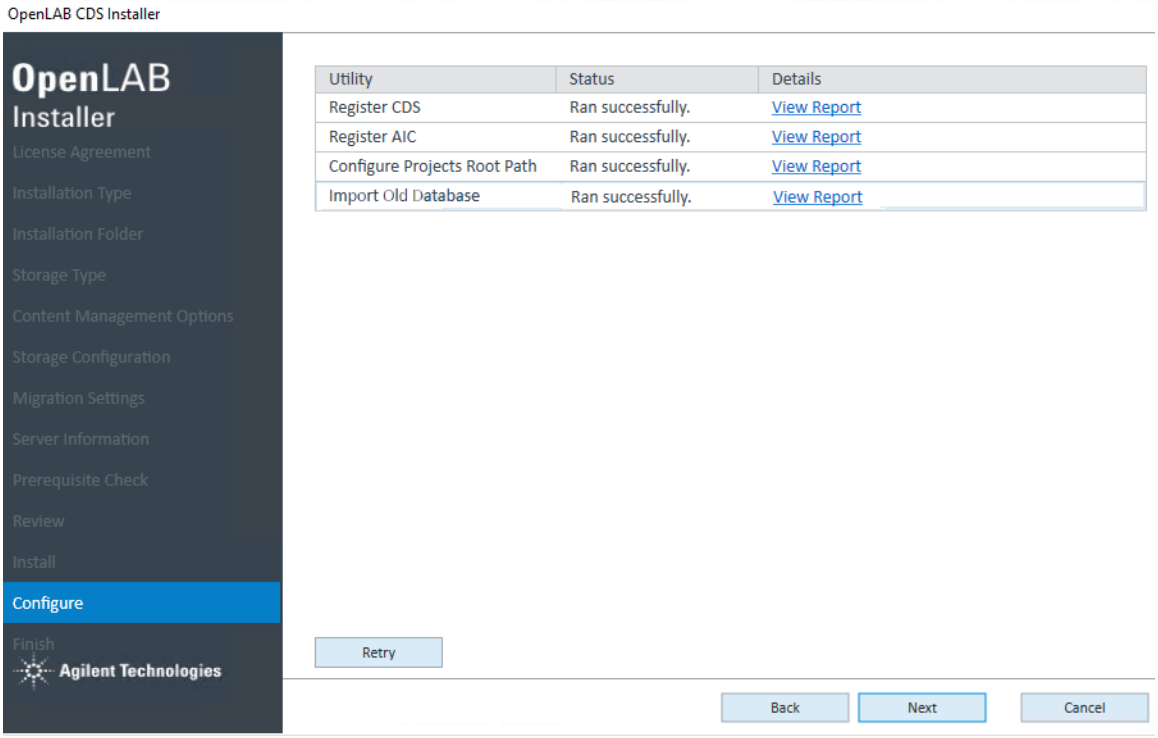


Figure 26. Successful installation and importation of migrated data

10 Click Next. The Installation Completed window appears (**Figure 27**.)

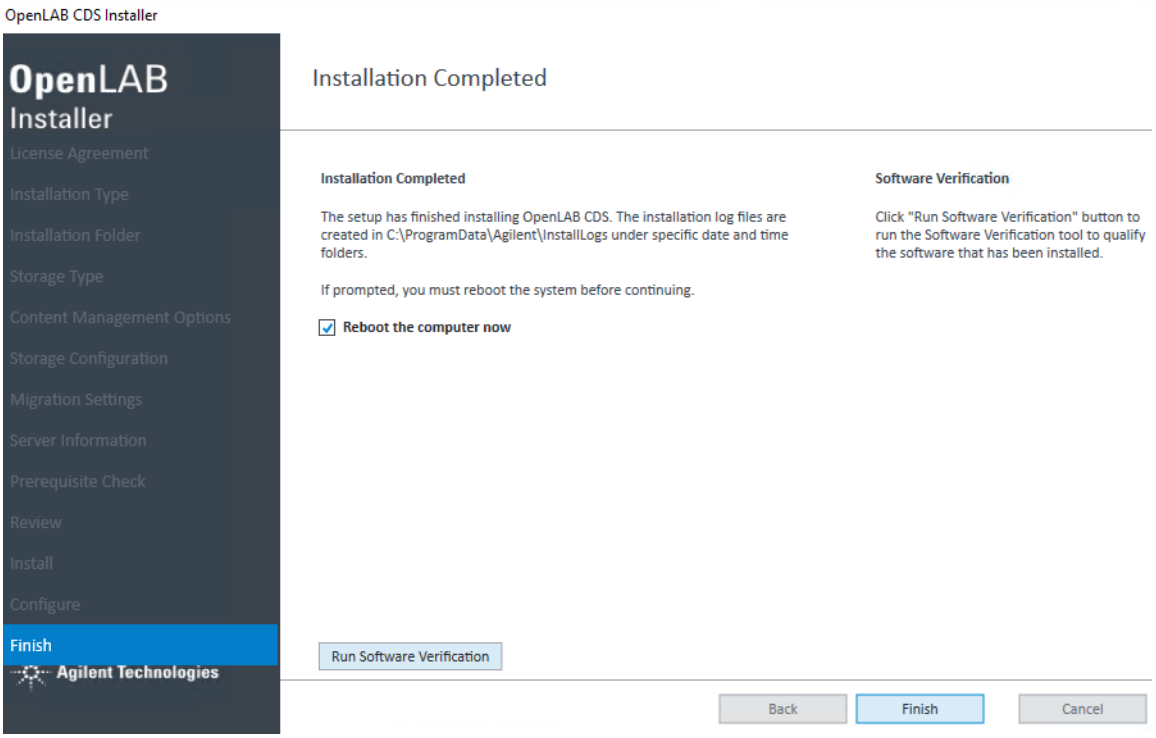


Figure 27. Installation completed

11 Click **Finish** to finish the installation and reboot the computer, or click **Run Software Verification** to run the software verification tool.

At this point, you should log into OpenLab CDS, where you will be prompted to change your password. Check that the data were imported correctly using the procedures described in **Chapter 5**, “Post-Migration Data Verification,” starting on page 91.

Using Migration Tools to import data after installation of OpenLab CDS

In situations where the Migration Tools are not executed successfully during installation of OpenLab CDS, use this procedure to run the Migration Tools from the OpenLab CDS installation media USB drive.

1 On the computer where your OpenLab CDS is installed, insert the OpenLab CDS version 2.x installation media USB drive, and migrate to the OpenLab CDS Migration Tools at **OpenLabCDS-2.x.\Setup\Tools\Migration**.

2 Select **Migration Tools for OpenLab**. The Migration Tools for OpenLab opens with the Planning tab displayed.

3 When the tool is running, click **Import** on the left side navigation pane.

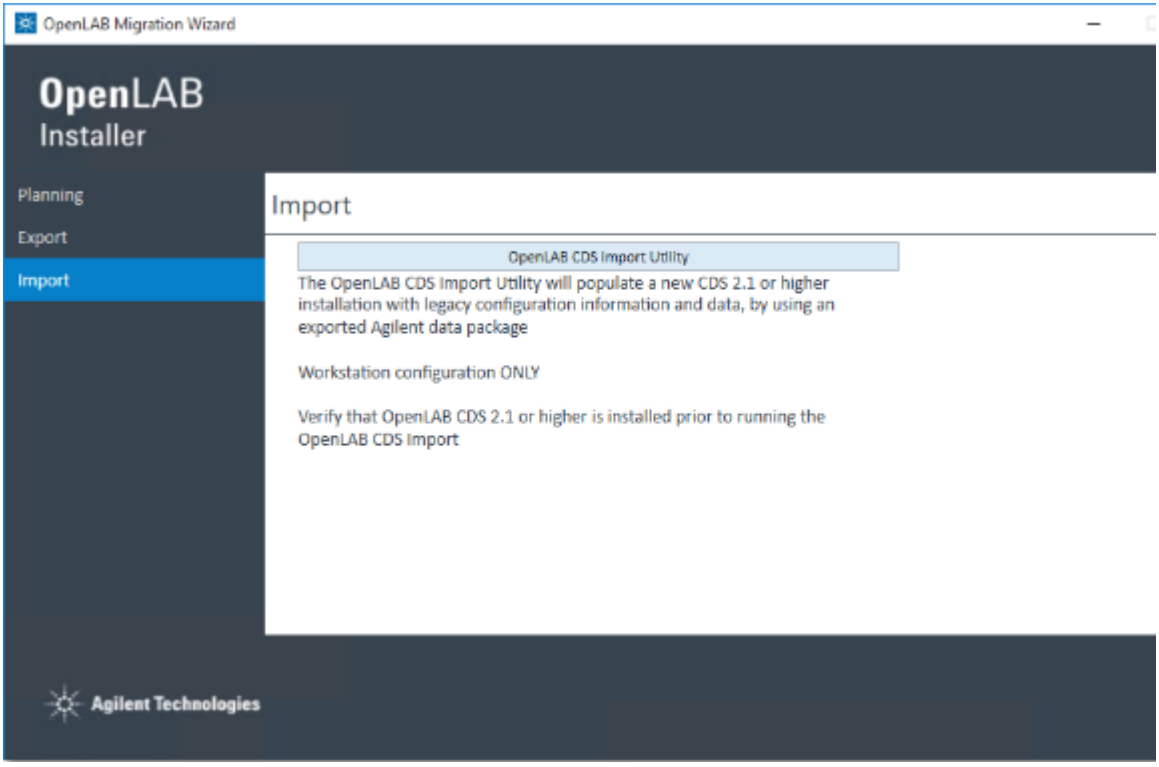


Figure 28. Migration Tools Import tab

4 Click **OpenLab CDS Import Utility** to launch the Import Utility, which enables you to set up and import the OpenLab CDS ChemStation Edition data to the OpenLab CDS machine.

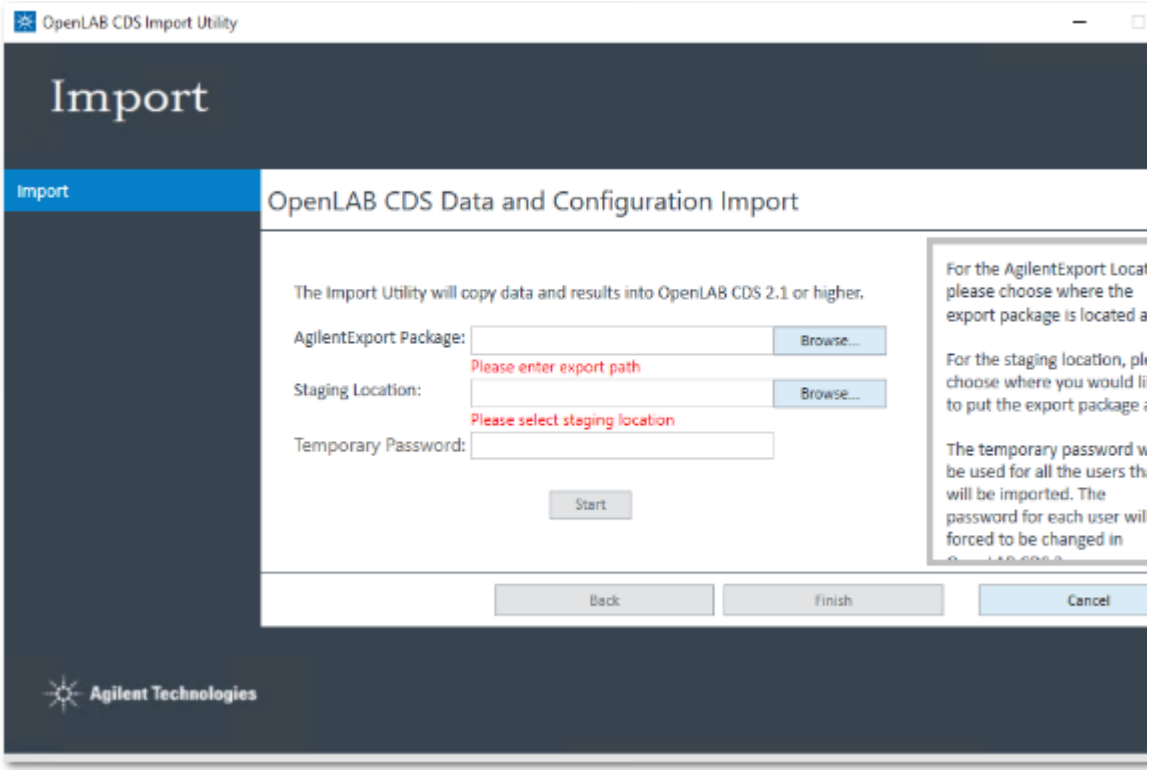


Figure 29. OpenLab CDS Data and Configuration Import

5 On the OpenLab CDS Data and Configuration Import screen, click **Browse** and navigate to the `AgilentExport` folder that was created on your export device after the export (see **Figure 13** on page 25). Select the whole folder, and click OK.

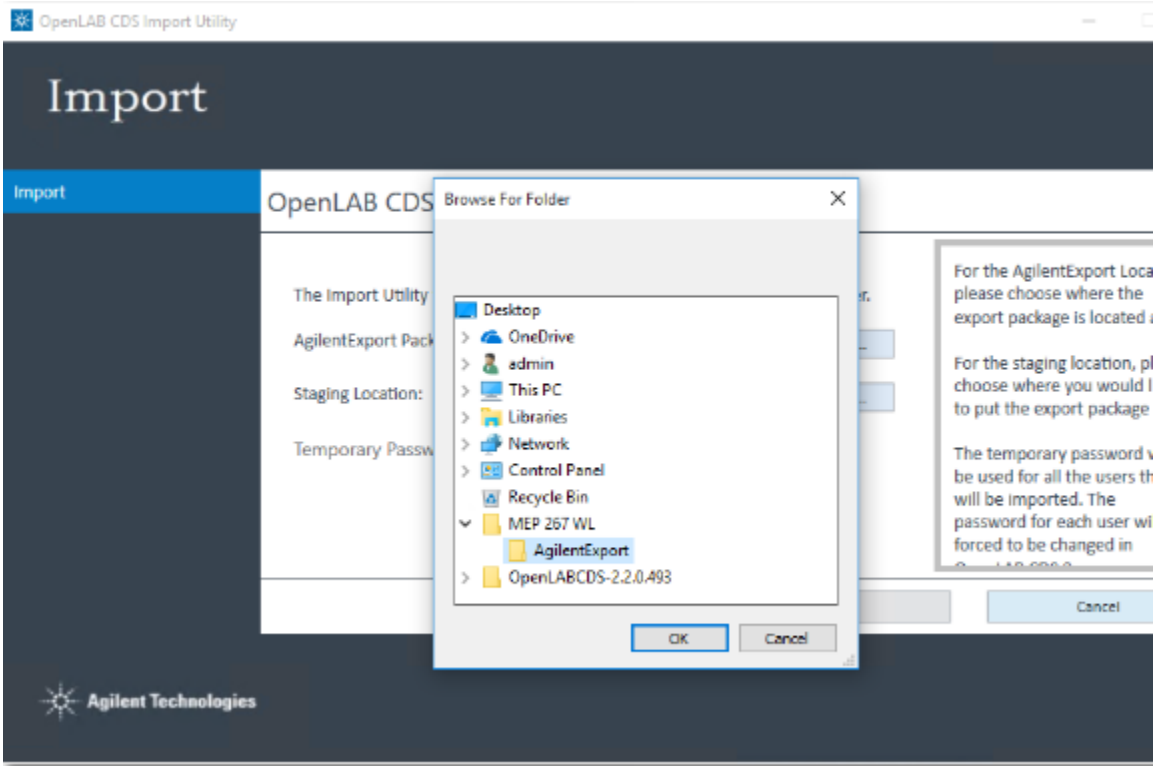


Figure 30. AgilentExport folder

6 Once you have selected the AgilentExport Package, next to the Staging Location, click **Browse**.

7 Browse to a location on your local drive and create a folder to use as a staging location for the import data.

8 Click **OK**.

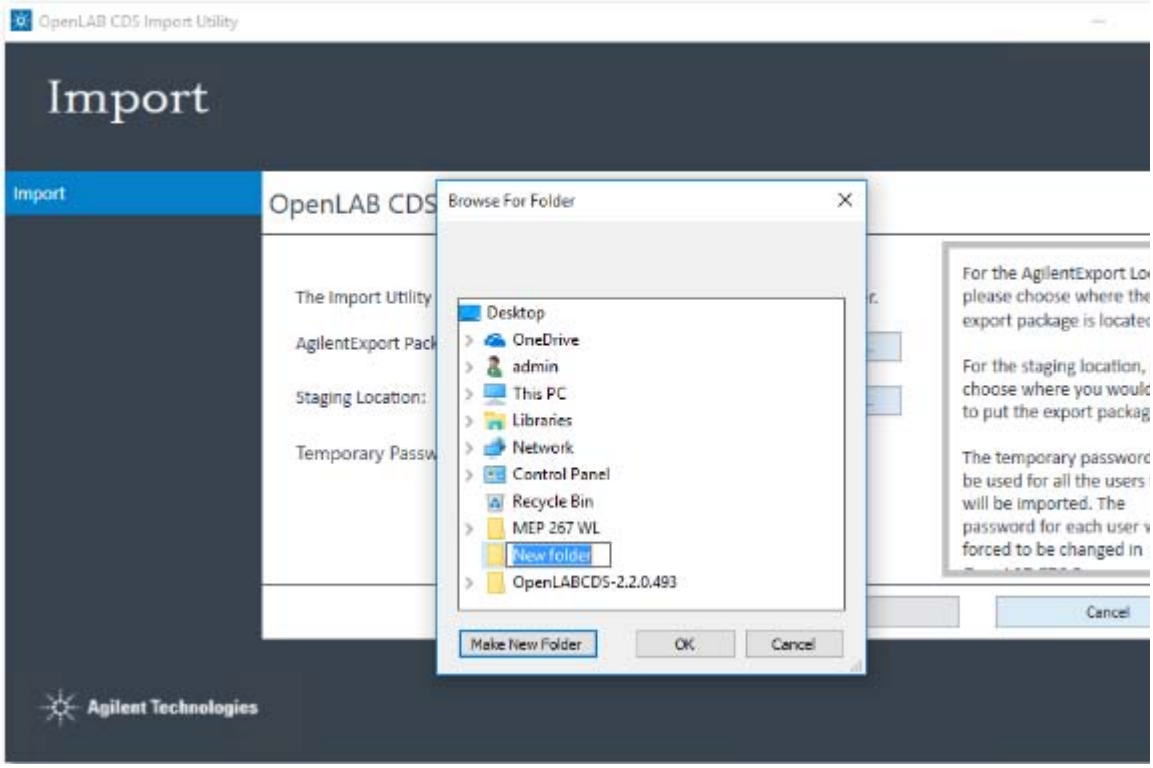


Figure 31. Creating a staging location folder

The Staging Location you created is filled in the Staging Location field.

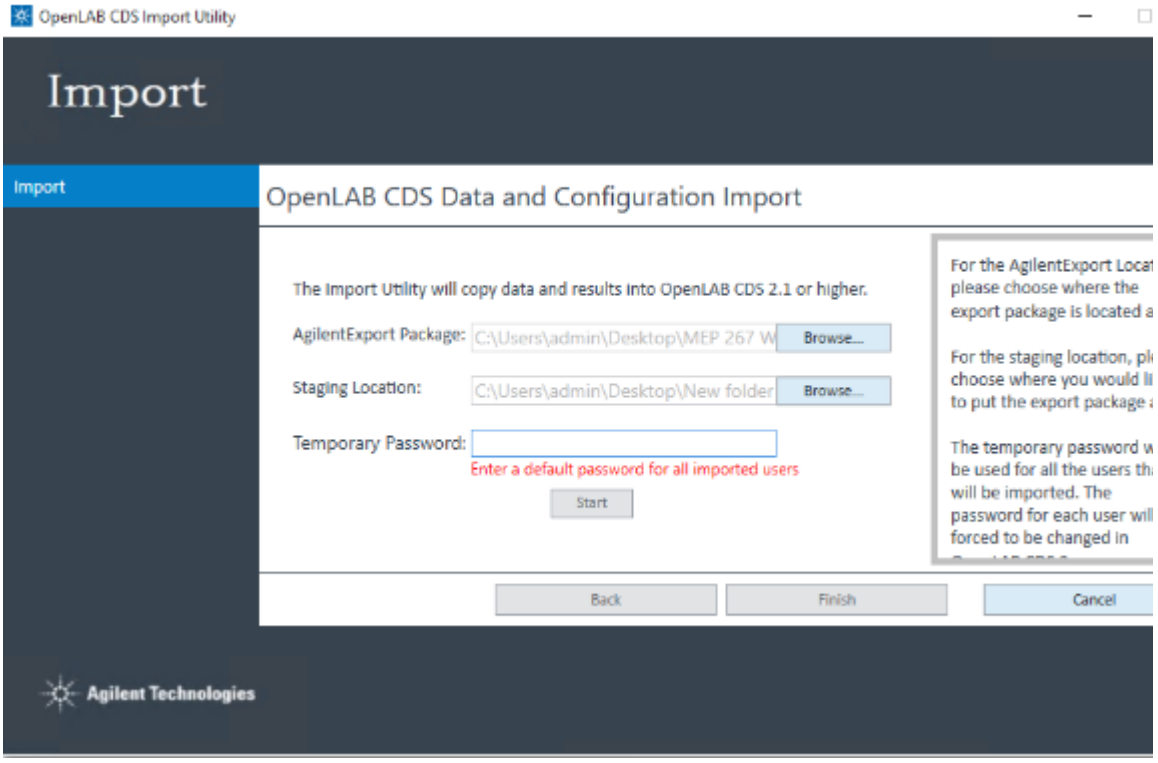


Figure 32. Import staging location selected

9 If you are using authentication, you are required to set a default password. Type the default password in the **Default Password** field. This password is enabled for all imported users. After logging on, each imported user is required to enter a new password.

NOTE

When Importing from ChemStation B or from OpenLab CDS ChemStation Edition without authentication, the Default Password field is unavailable.

When you correctly complete all fields, the **Start** button is enabled.

10 Click **Start** to begin the import process.

A status bar shows the import is in progress.

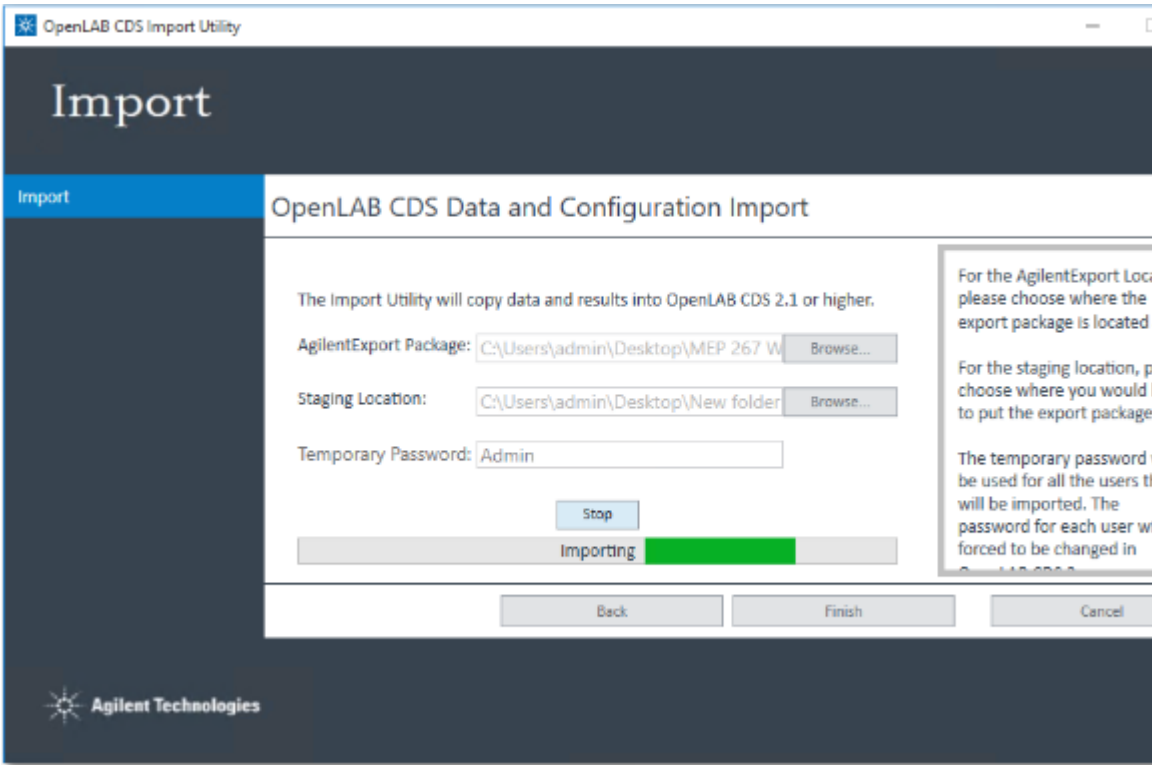


Figure 33. OpenLab CDS Data and Configuration Import progress

What happens when data are imported

For OpenLab CDS ChemStation Edition

During the import process, the migration tool performs the tasks in the background in the following order:

a Automatically creates a default project group in the local OpenLab CDS Workstation installation called `ChemStation Data Archive_TimeStamp`, with subprojects for each instrument.

b Extracts the data from the export package to the staging location.

c Imports the data so that OpenLab CDS Data Analysis can read them (**Figure 34**).

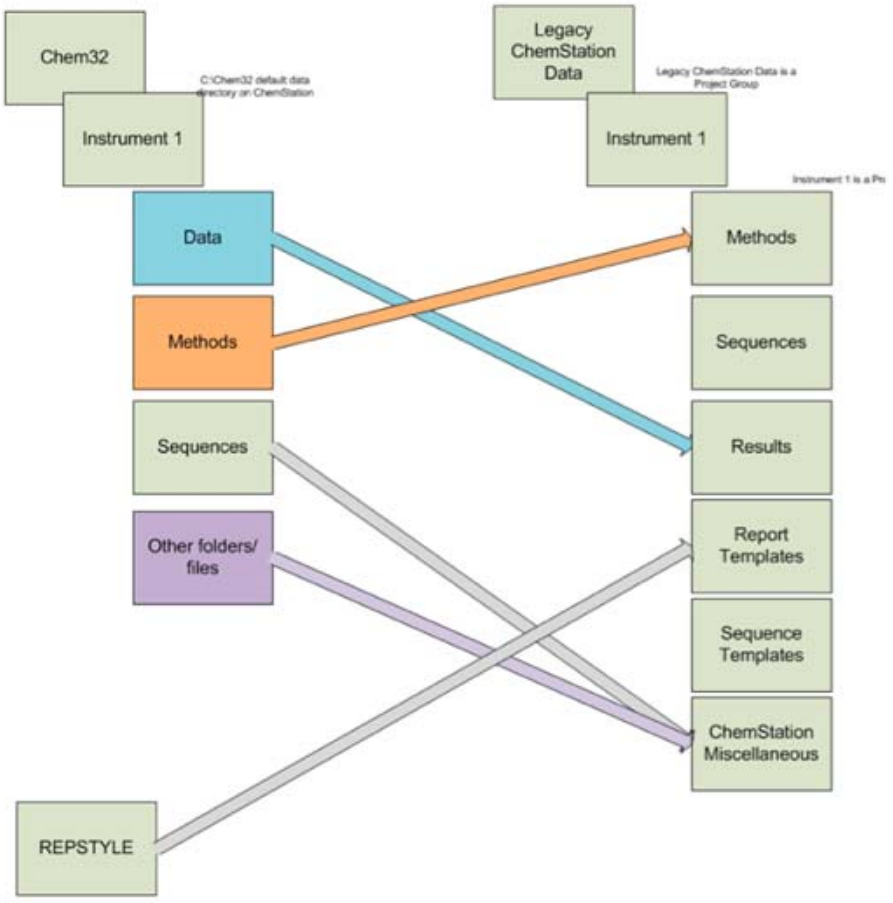


Figure 34. Reorganizing result data

d Creates users and groups in OpenLab CDS to match those that existed in the OpenLab CDS ChemStation Edition installation.

e Creates roles in OpenLab CDS based on the configuration in the OpenLab CDS ChemStation installation.

f Recreates any active instruments from OpenLab CDS ChemStation Edition.

For ChemStation B

For data exported from ChemStation B, the Migration Tool extracts the data from the export package to the staging location only.

When the import completes, a confirmation message appears “The import has completed”, and the Finish button is enabled.

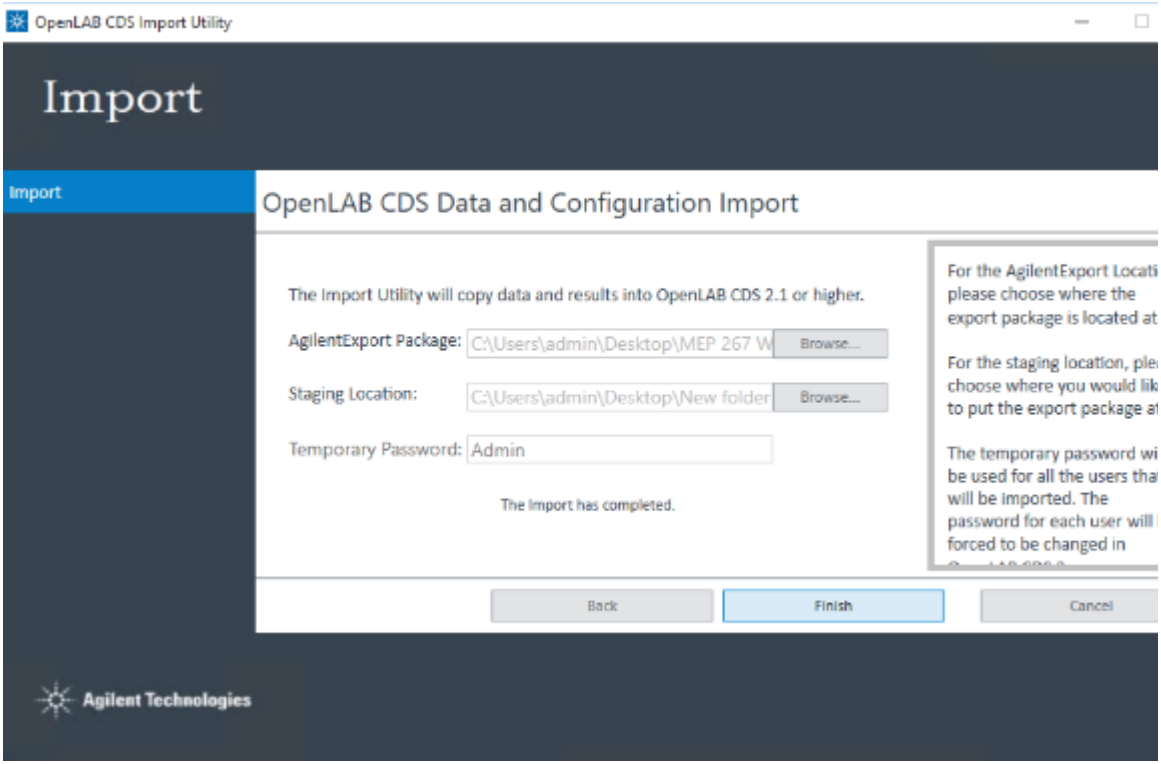


Figure 35. Import completed

11 Click **Finish** to complete the import process. The migration tool exits. If the export package was created with OpenLab CDS ChemStation Edition, the extracted files located in the staging location are removed. If the export package was created with ChemStation B, the extracted files in the staging location will remain.

4 Migrating Data from OpenLab CDS EZChrom Edition

Using the Migration Tools for OpenLab to Export Data from OpenLab CDS EZChrom Edition 54
Using the Migration Tools for OpenLab to Import Data 72

This chapter contains procedures for migrating data from OpenLab CDS EZChrom Edition Workstation to OpenLab CDS Workstation using the Migration Tools for OpenLab. The Migration Tools export raw and results data, shared services information, project information, instrument information, users/groups, and roles/privileges.

Using the Migration Tools for OpenLab to Export Data from OpenLab CDS EZChrom Edition

Use the following procedure to export data from your OpenLab CDS EZChrom Edition to an export location (USB drive or network location).

1 Insert the OpenLab CDS Workstation version 2.x USB media, right-click the setup.exe file, and run it as administrator. This starts the OpenLab CDS Installer.

2 In the OpenLab Installer navigator, click **Migration**.

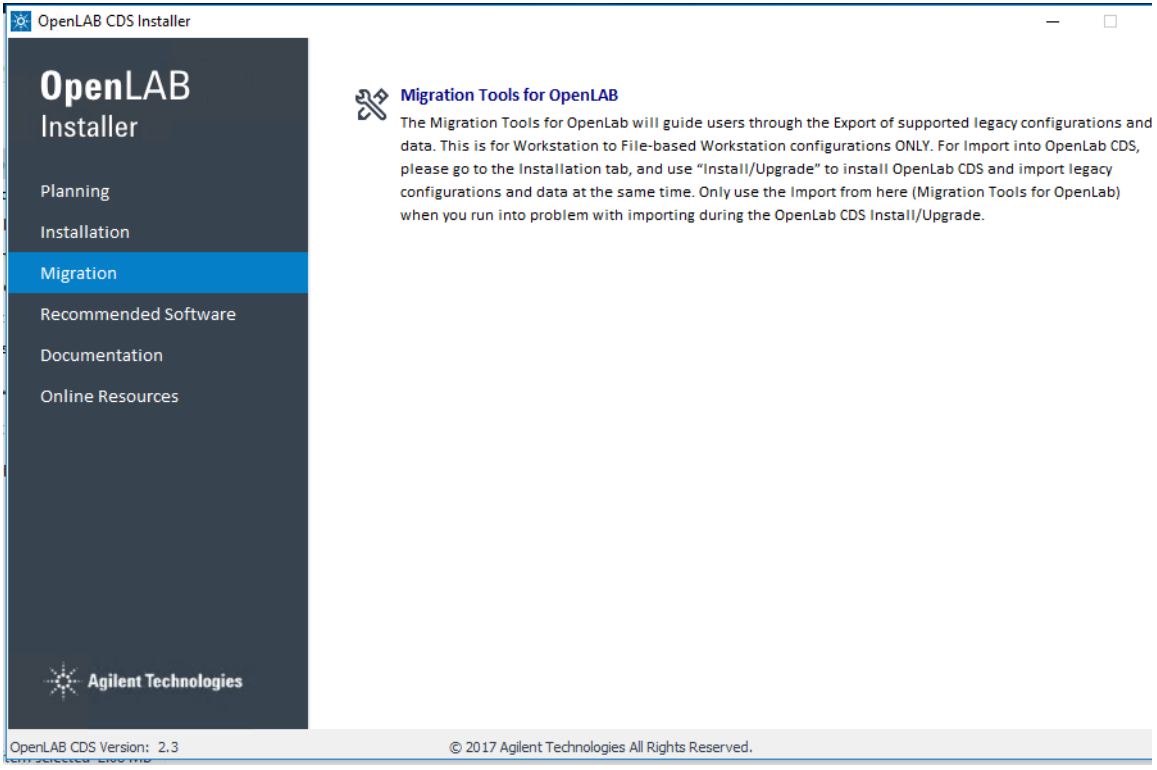


Figure 36. Migration tool selection from the OpenLab CDS installer

3 Select **OpenLab Migration**. The Migration Tool opens.

4 On the left navigation pane, click **Export**. The OpenLab CDS EZChrom Export Utility button is displayed.

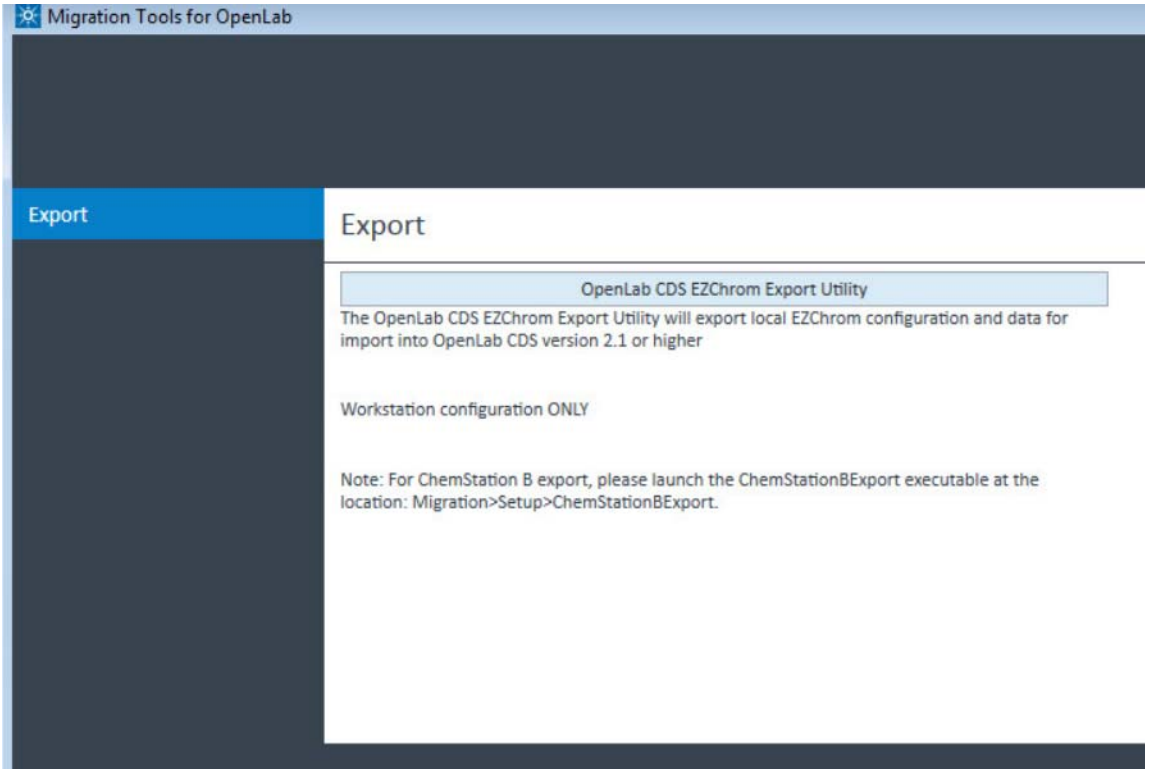


Figure 37. Migration Tool - Export tab

5 Click **OpenLab CDS EZChrom Export Utility** to launch the Export Utility.

6 If you see a pop-up Security Warning, click **Run** on the pop-up screen.

The EZChrom Analysis window opens and automatically analyzes the version number of the OpenLab CDS EZChrom Edition to ensure that it is a supported version. If a non-supported version is detected, an error is displayed.

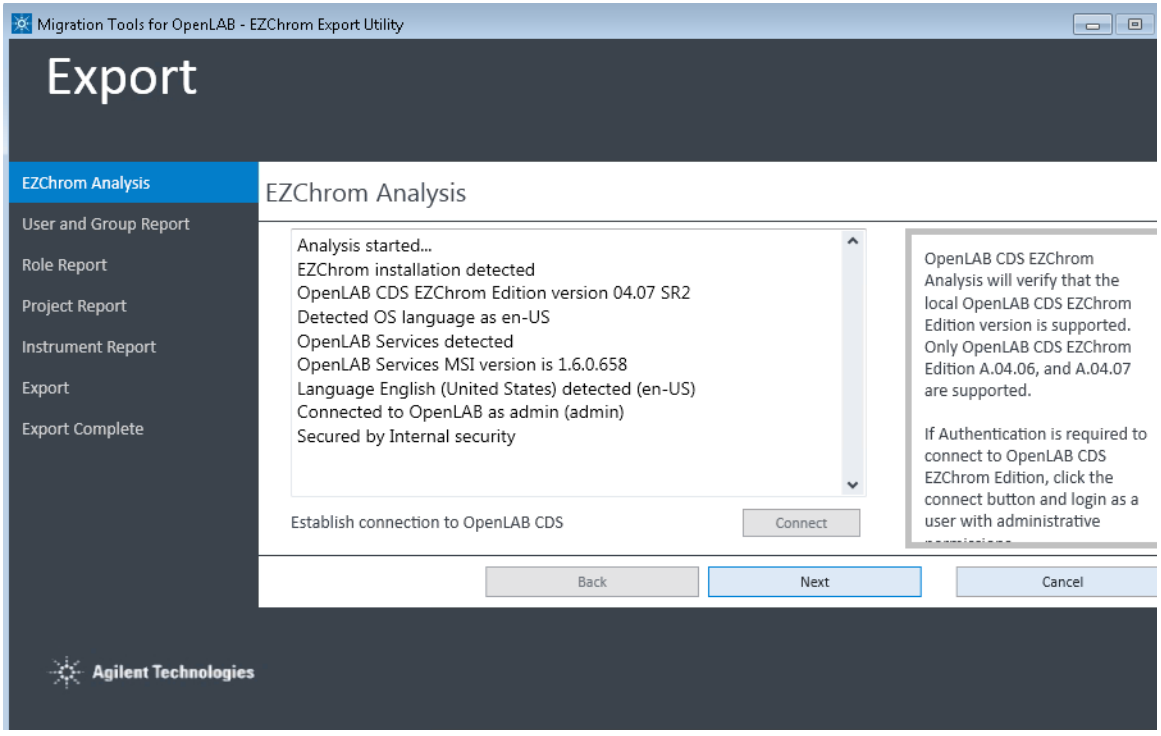


Figure 38. Export Utility - EZChrom Analysis

Once the version is verified, if authentication is required for OpenLab CDS EZChrom Edition, the OpenLab Control Panel login window appears. (See **Figure 39**.)

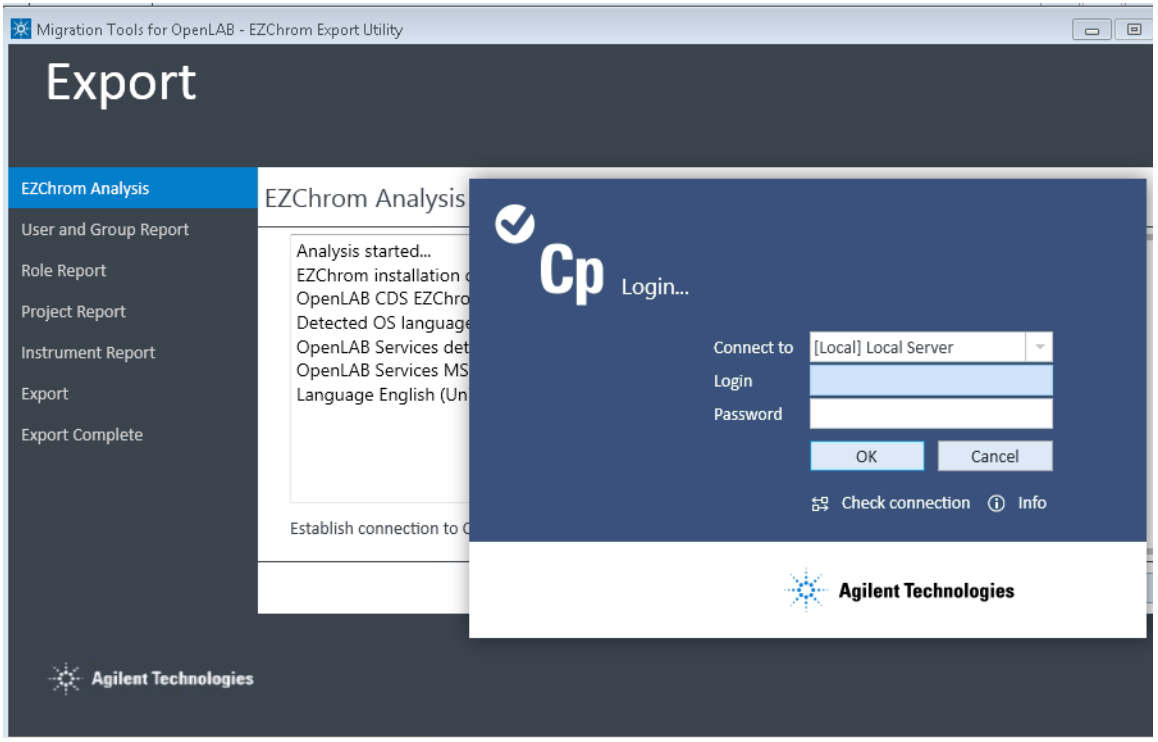


Figure 39. Export Utility- Login to shared services

7 In the login pop-up window, log into OpenLab CDS EZChrom Edition by completing the following fields, then click **OK**.

- **Connect to** — Local Server is selected by default.
- **Login** — Type the username of the system administrative account for OpenLab CDS EZChrom Edition. This enables the tool to authenticate and retrieve data from OpenLab CDS EZChrom Edition.
- **Password** — Type the password for the system administrative account entered in the Login field.

- **Domain** — If using Windows Domain authentication, select the user's domain. (This does not appear if Windows Domain authentication is not being used for OpenLab CDS EZChrom Edition.)

8 On the **EZChrom Analysis** screen, click **Connect** to re-attempt connection, if needed. Otherwise, click **Next**.

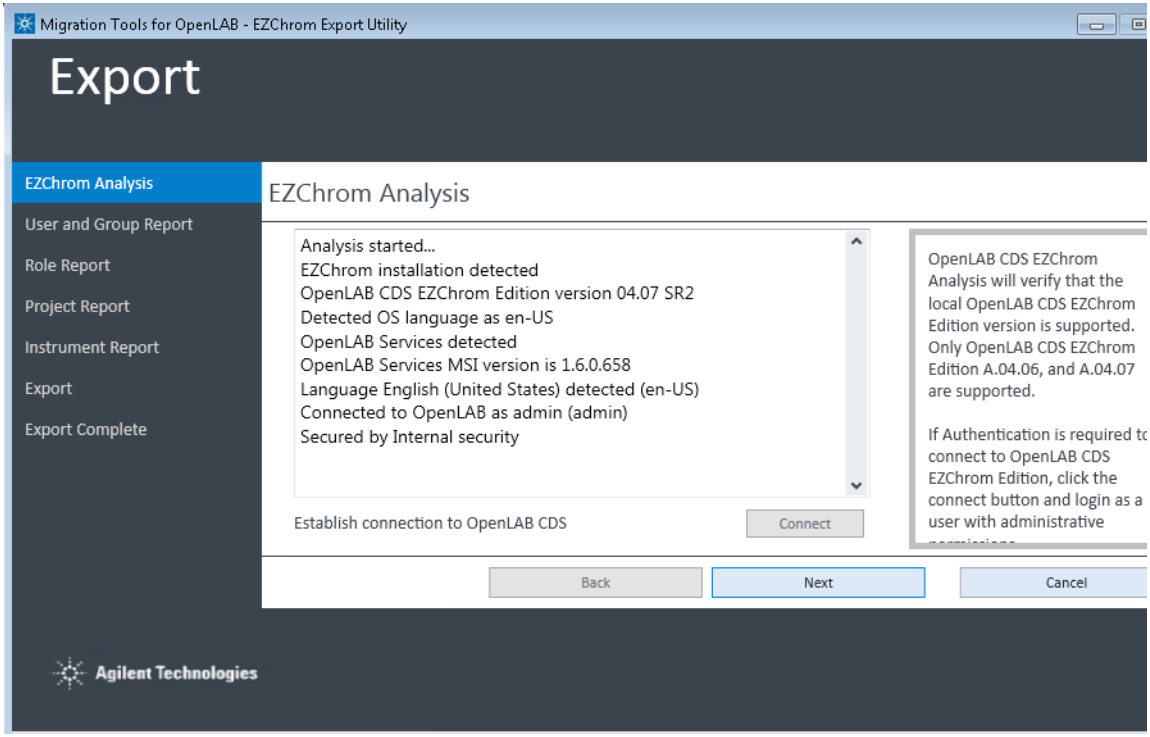


Figure 40. Export Utility - EZChrom Analysis

The User and Group Report screen appears (**Figure 41**.)

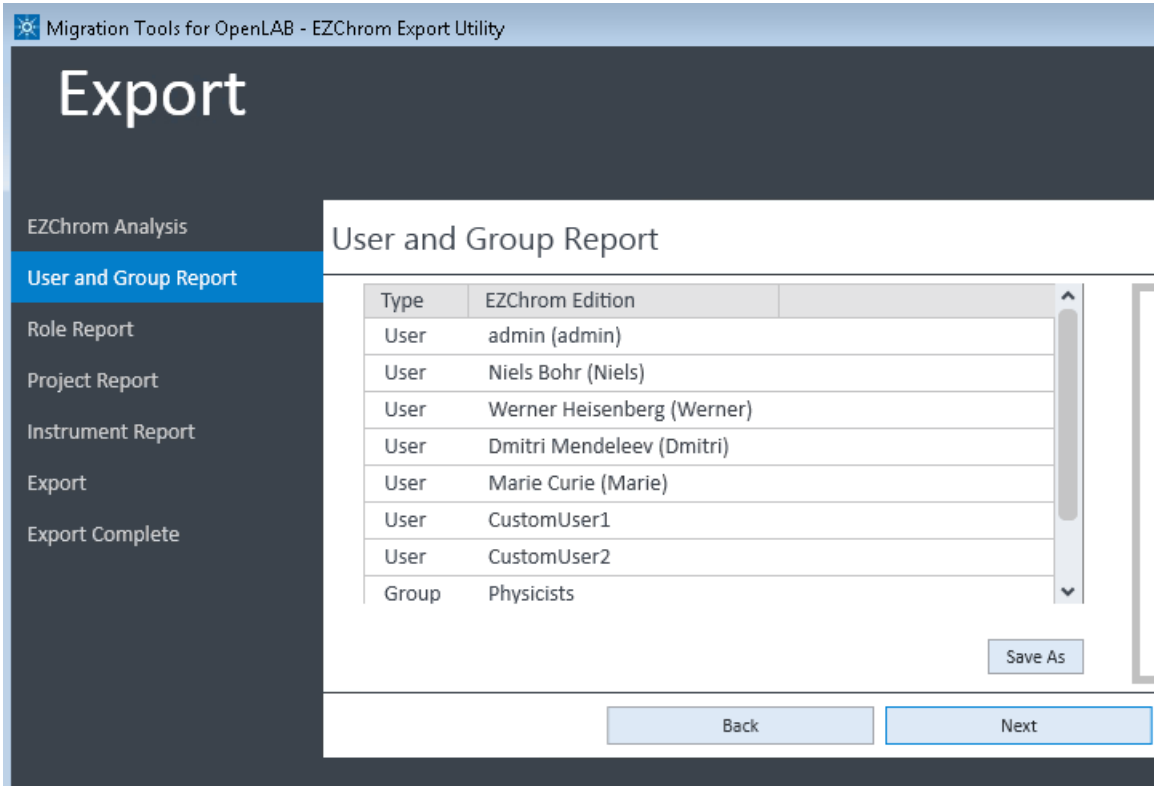


Figure 41. Export Utility - User and Group Report

For Windows Local Security

If you are using Windows Local security on OpenLab CDS EZChrom Edition, the User and Group Report will have a different appearance because OpenLab CDS version 2.x does not support Windows Local security. (See **Figure 42**.)

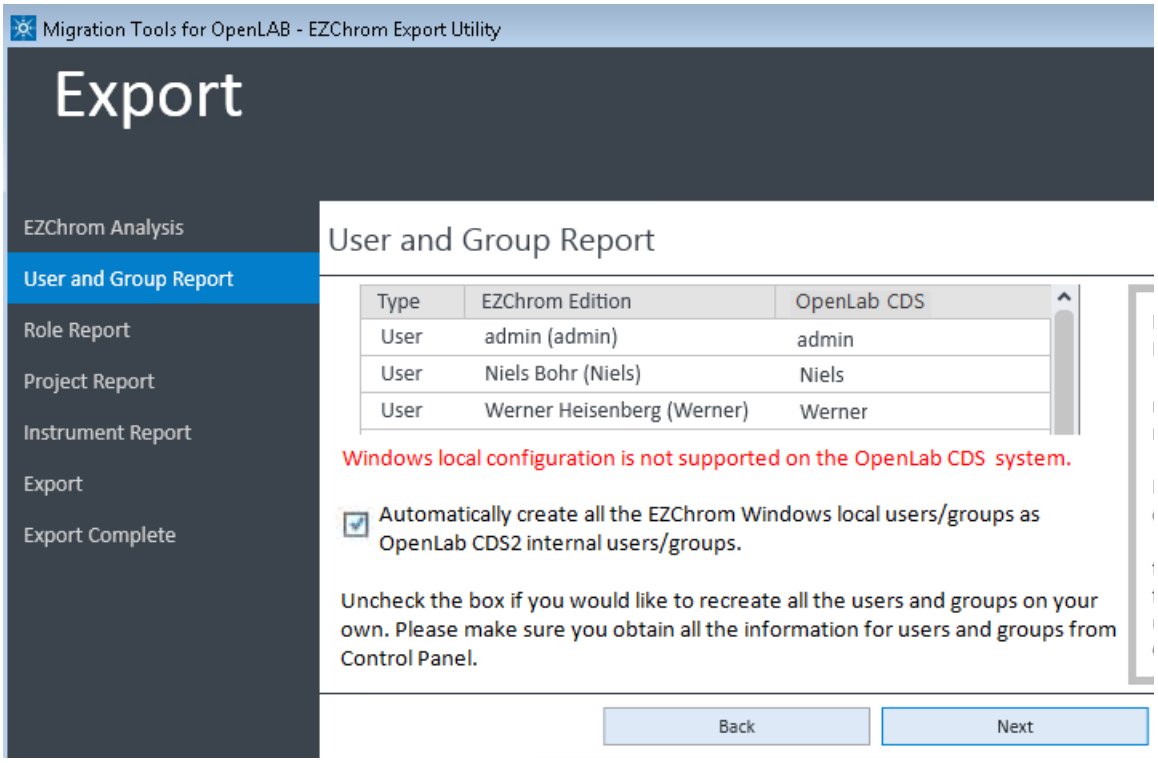


Figure 42. User and Group Report with Windows Local configuration

Select the checkbox to automatically recreate all the OpenLab CDS EZChrom Edition Windows local users and groups as OpenLab CDS version 2.x Internal users and groups.

Clear the checkbox to enable you to manually recreate all the users and groups later from within OpenLab CDS version 2. (Make sure you have obtained all the user and group information from the OpenLab CDS EZChrom Edition Control Panel if you choose this option.)

9 Review the users and groups to export. If desired, click **Save As** to browse to a location and save the list as html file. (Note that the list is automatically saved when export is completed.)

10 Click **Next**.

The Role Report screen appears, which displays all the roles the tool has detected, along with the mapped roles for OpenLab CDS 2 (**Figure 43**).

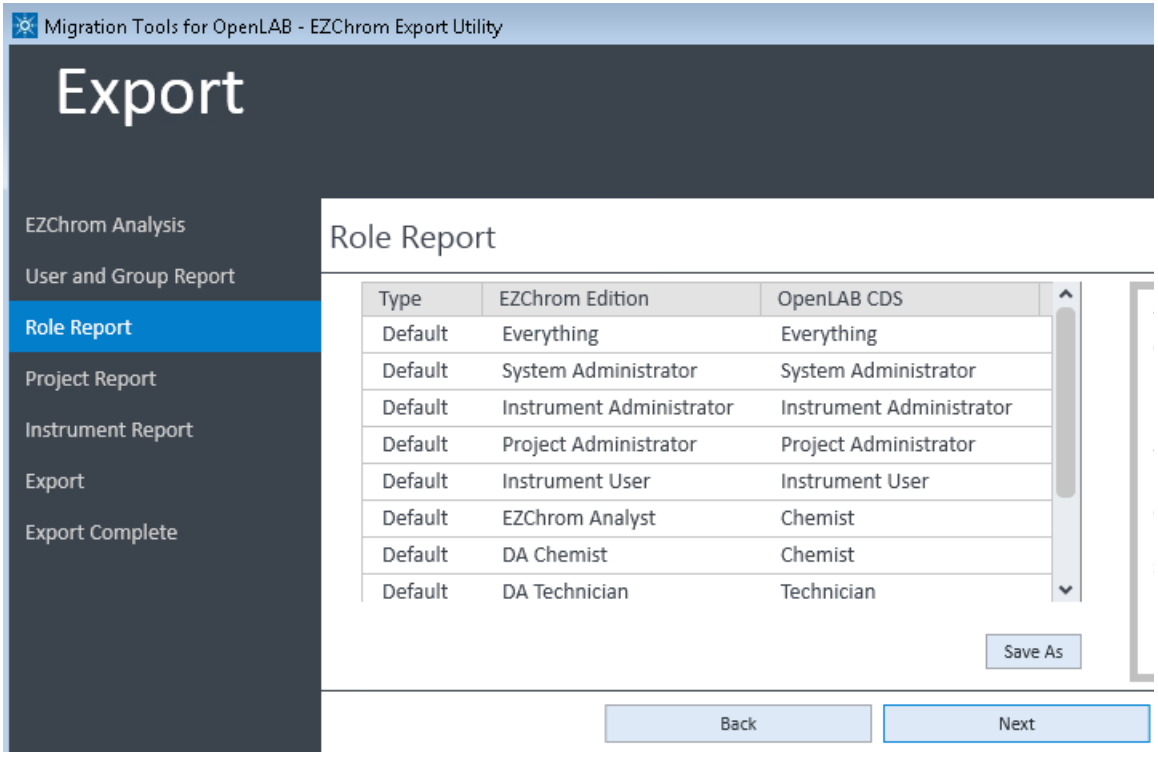


Figure 43. Export Utility - Role Report

11 Click **Save As** to save the roles information as an HTML page. Otherwise, click **Next**.

The Project Report screen appears, which displays the existing Projects and locations.

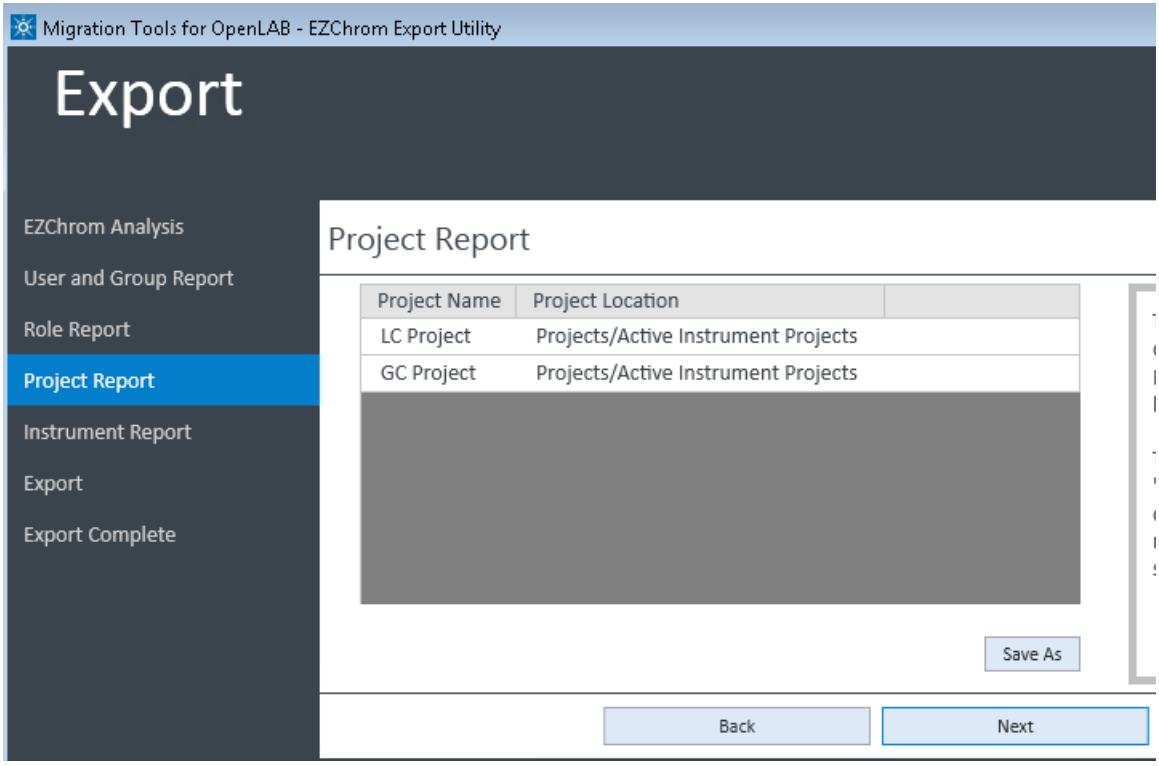


Figure 44. Export Utility - Project Report

12 Click **Save As** to browse to a location and save the project information as an HTML page. (The project report is also saved into the export package by default.) Otherwise, click **Next**.

The Instrument Report screen displays the instruments that are connected to the OpenLab CDS EZChrom Edition, and are active, as shown in **Figure 45**.

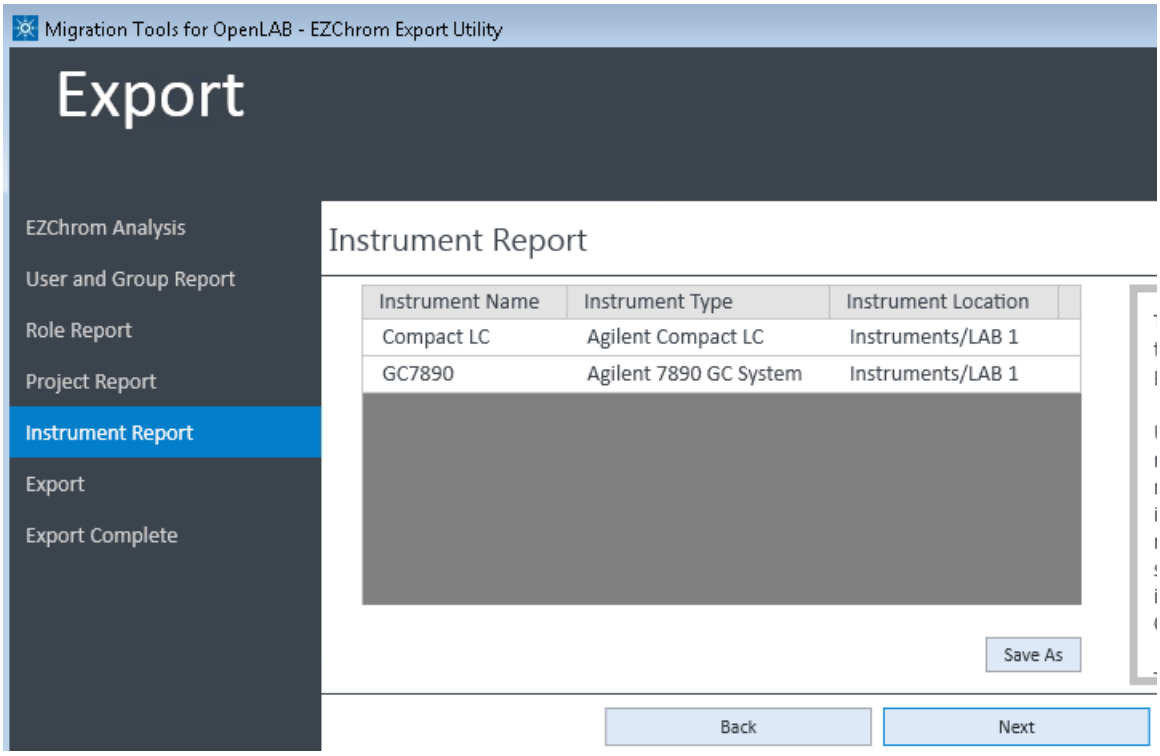


Figure 45. Export Utility - Instrument Report

13 If desired, click **Save As** to save the Instrument Report as an HTML file. Otherwise, click **Next.**

The OpenLab CDS Data and Configuration Export screen enables you to select the data export location (**Figure 46**). The tool determines and displays the amount of disk space used by the result and system configuration data, and displays it in a table:

- **Security and Instrument Configuration** – This is the OpenLab shared services configuration data, such as the administrative information.
- **EZChrom Data** – By default, all the OpenLab CDS EZChrom Edition data is migrated.

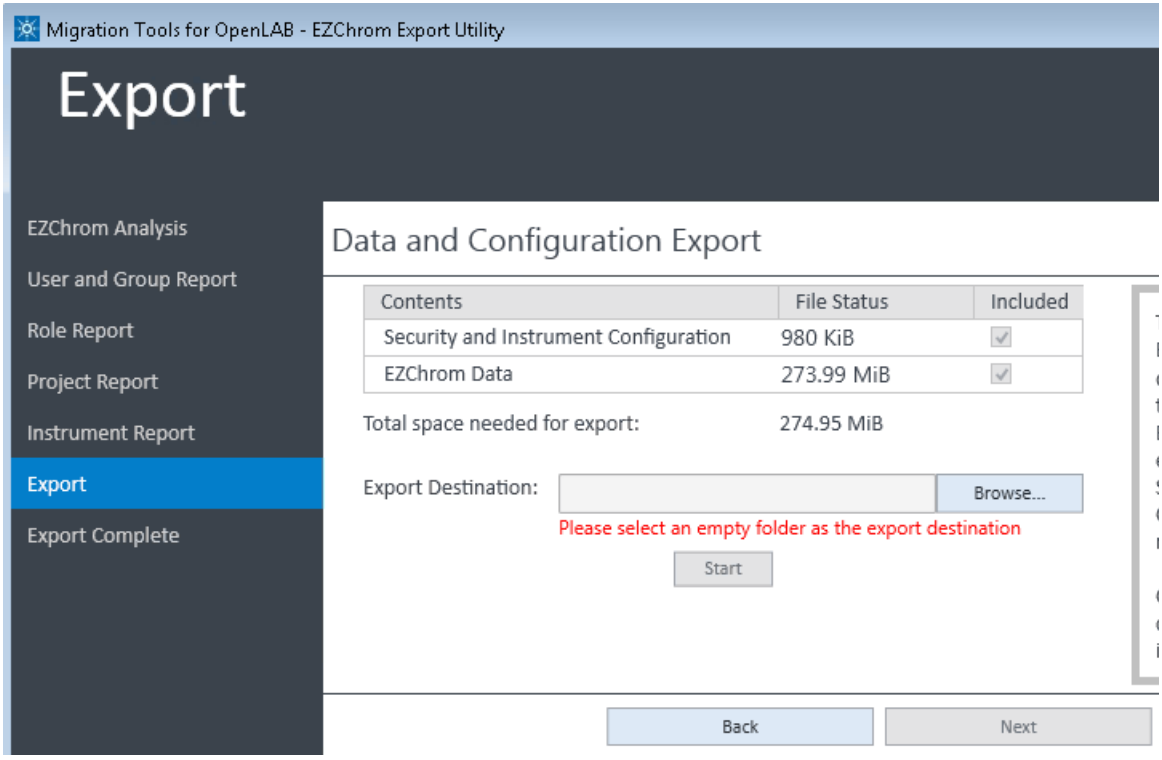


Figure 46. Export Utility - Data and Configuration Export

14 The **Export Destination** field is the destination folder where the OpenLab CDS EZChrom Edition files are exported. Click **Browse** and then click **Make New Folder** to create an empty folder in your export location, as shown **Figure 47**.

NOTE The export destination folder selected must be empty.

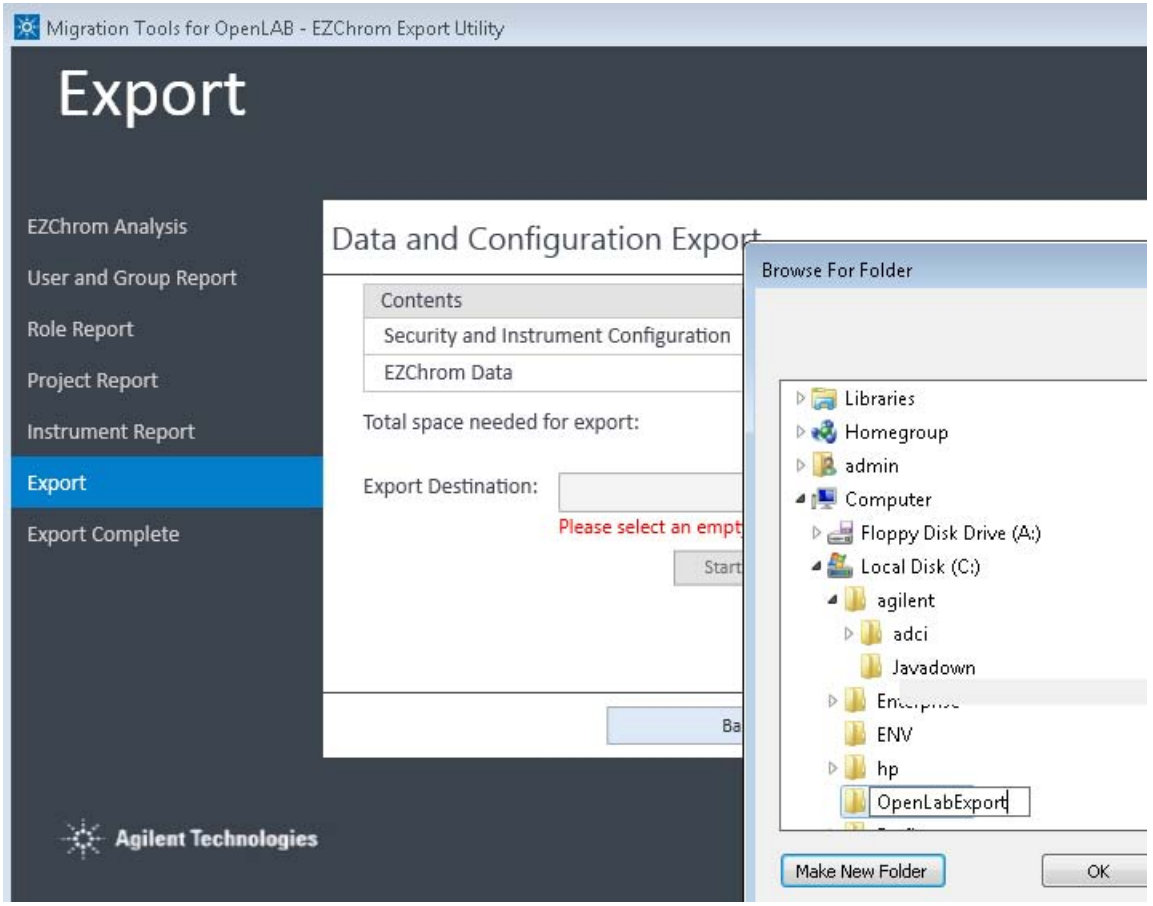


Figure 47. Export Utility- creating an export folder

The Start button is enabled when the Export Destination is ready.

15 Click **Start** to begin the export process. The status bar indicates the export is in process (**Figure 48**), and the File Status changes from "In Progress" to "Done" when completed.

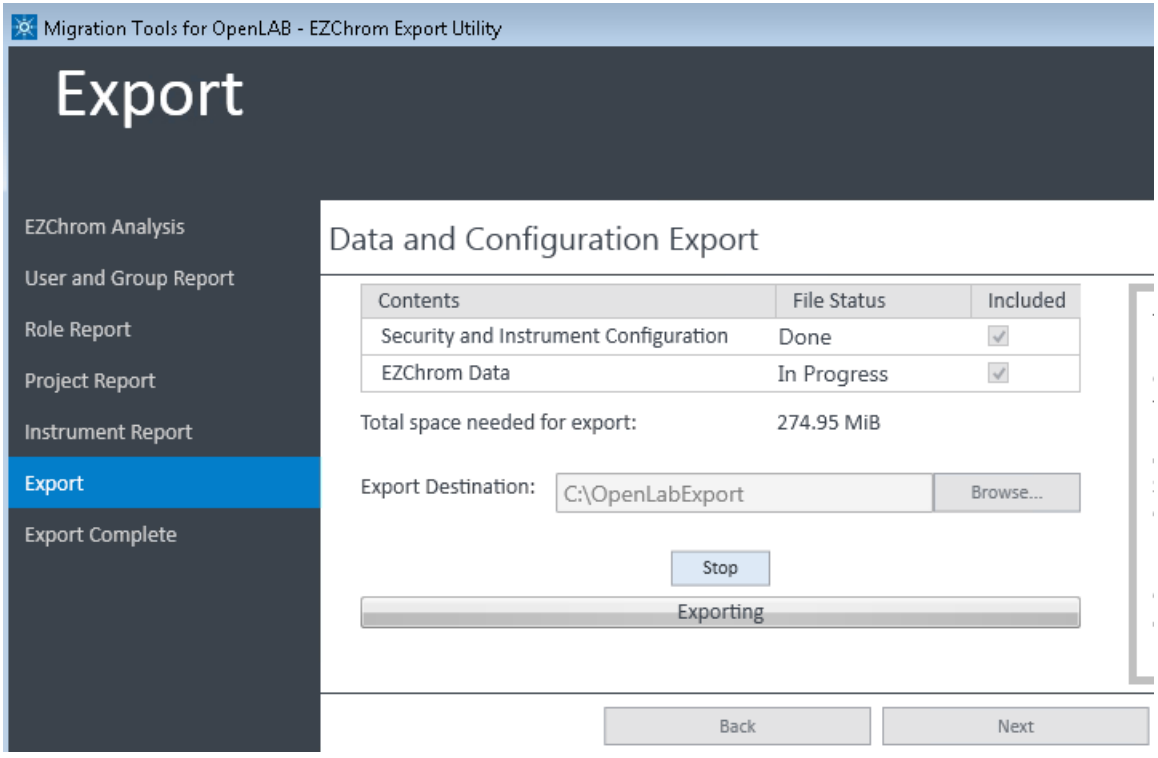
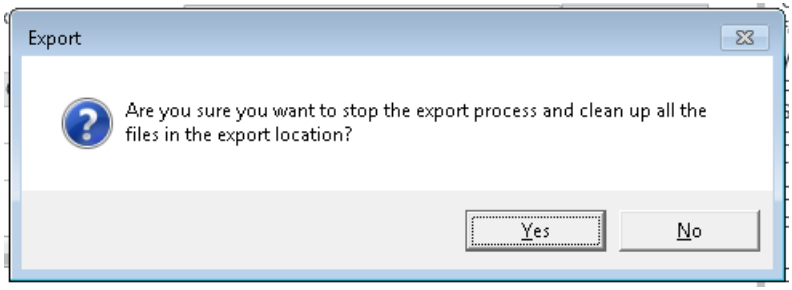


Figure 48. Export Utility - export in progress showing File Status

If you need to halt the export, click **Stop**. A pop-up message asks you to confirm your decision. The export process continues while the message is showing.



- If you click **Yes**, the export process stops and all the files in the export destination are cleaned up.
- If you click **No**, the message disappears, and the export process continues.

When the export completes, the Stop button and the progress bar disappear, and you see the following message “The export has completed”, as shown in **Figure 49**.

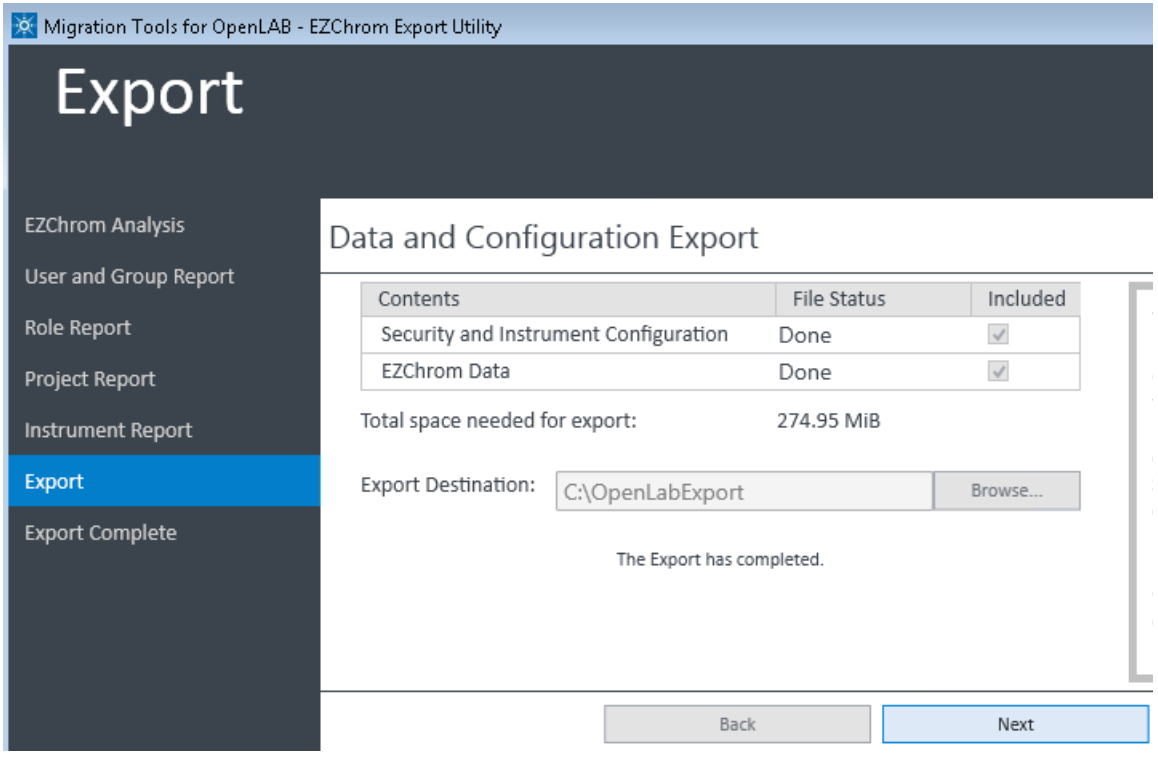


Figure 49. Export Utility - export completed

16 Click **Next** to get a confirmation of the success.

17 Click **Finish** to complete the export process. The migration tool exits.

At this point, you have successfully exported data from OpenLab CDS EZChrom Edition to your export device. Proceed to Import your data to OpenLab CDS version 2. See **"Using the Migration Tools for OpenLab to Import Data"** on page 72.

The export files are located in the `AgilentExport` folder in the export location you selected, as shown in **Figure 50**.

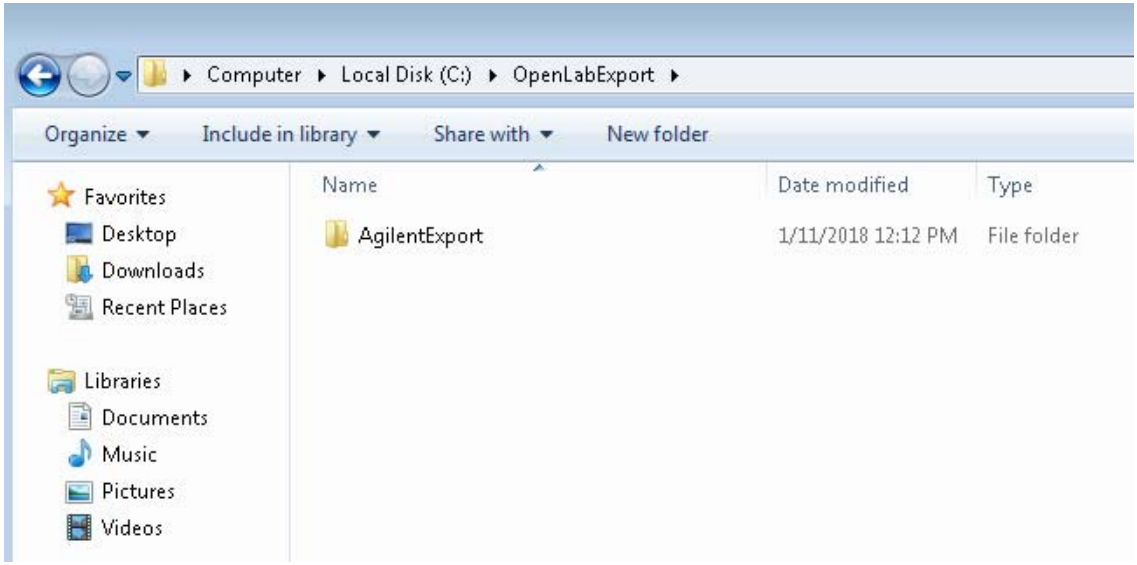


Figure 50. Export folder created by Migration Tool export

Figure 51 displays the contents of the `AgilentExport` folder.

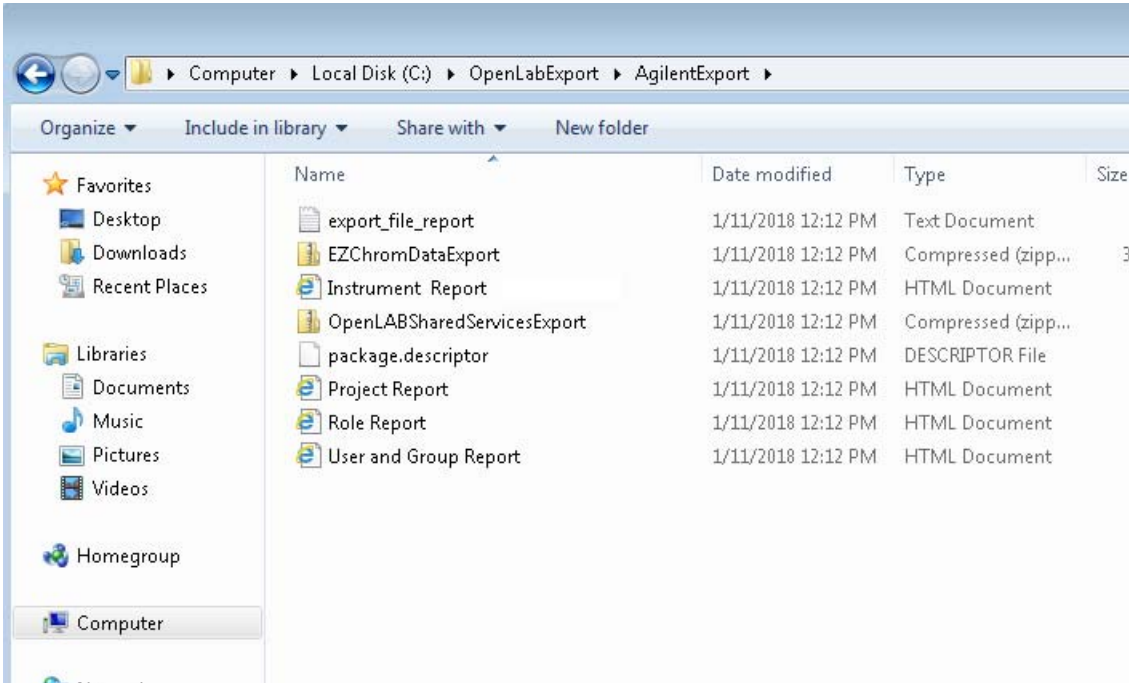


Figure 51. Contents of the AgilentExport folder

- EZChromDataExport — zip package containing the EZChrom data.
- export_file_report — text file details the export activities. Specifically, it lists all the files that are included in the OpenLab CDS EZChrom Edition export that are in the EZChrom Export zip package.
- Instrument Report — HTML file with instrument information
- OpenLabSharedServicesExport — zip package containing the OpenLab Shared Services data, such as security, authentication, roles, administration information, and instrument configuration
- package.descriptor – XML file containing details of the mapping to the import
- Project Report — HTML file with project information
- Role Report — HTML file with user role information
- User and Group Report — HTML file with users and groups

NOTE

Do not modify these files. They are used by the Import function of the Migration Tools for OpenLab.

NOTE

If you are using Windows local users (unsupported in OpenLab CDS 2), and intend to recreate the new users as OLSS internal users in OpenLab CDS version 2, make sure to obtain all the Users and Groups information from the OpenLab CDS EZChrom Edition Control Panel. The "User's and Group's Role Assignment Report" from Control Panel could be used as a reference

Using the Migration Tools for OpenLab to Import Data

Once you have used the Migration Tools to export your data from the OpenLab CDS EZChrom Edition, you will use the Migration Tools to import the data into your OpenLab CDS Workstation version 2.x. Importing the exported data is normally done as part of the installation of the OpenLab CDS 2 software.

NOTE

Refer to **Chapter 2**, "Preparing for Migration" for additional information about requirements.

NOTE

If migration is being performed in-place (on a single computer), you must uninstall OpenLab CDS EZChrom Edition and make sure the computer meets all the requirements before you install OpenLab CDS Workstation version and import using the Migration Tools.

NOTE

If the export package was created with OpenLab CDS EZChrom Edition, the extracted files that were loaded into projects in OpenLab CDS are removed from the staging location at the end of the import process. If the export package was created with EZChrom B, the extracted files in the staging location will remain. Always create a backup of the files to be migrated before starting the import process.

Running Migration Tools to import data as part of the OpenLab CDS installation

1. On the OpenLab CDS Workstation computer, insert the OpenLab CDS Workstation version 2.x USB drive, right-click the setup.exe file, and run it as administrator.
2. From the drop-down menu, select **OpenLab CDS** and then click **OK**. This starts the OpenLab CDS Installer.

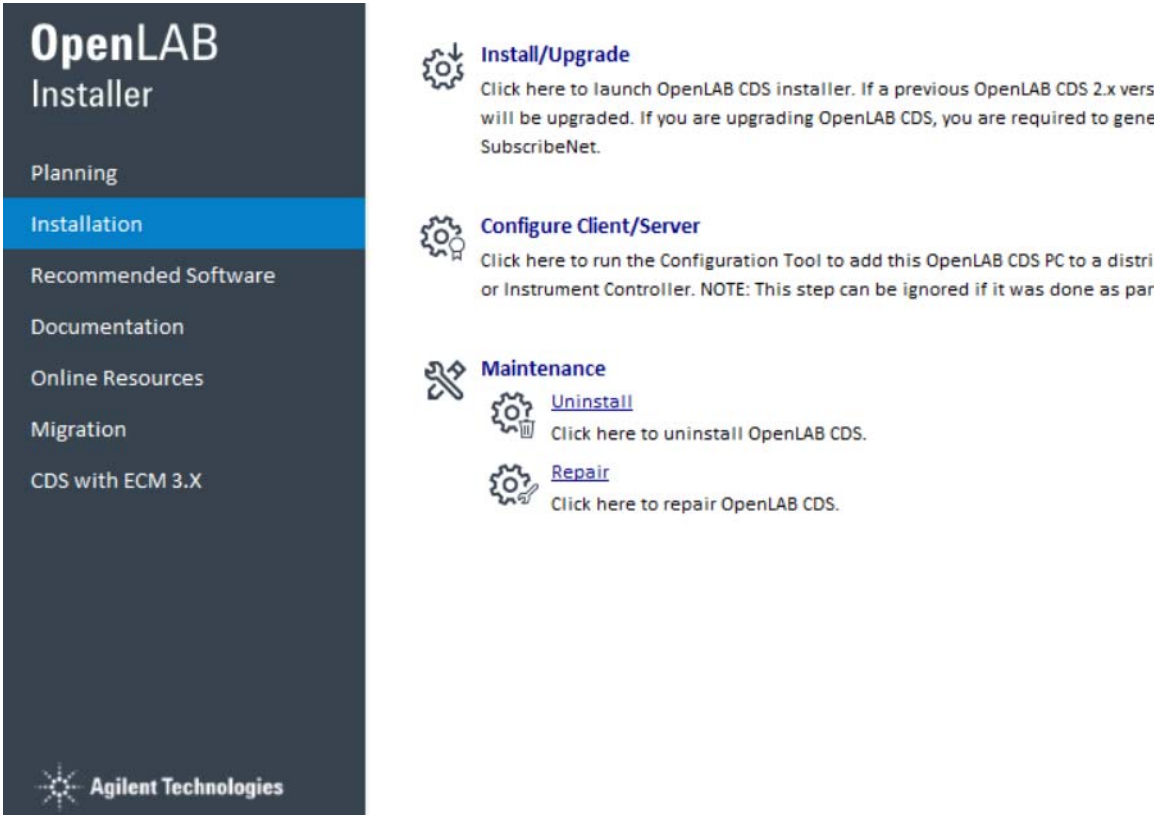


Figure 52. OpenLab CDS Installer

3 Install OpenLab CDS Workstation according to the directions in the OpenLab CDS Workstation User Guide.
   - **a** Do not select 'Secure 'Projects Root Path'.
   - **b** Set Authentication to “none.”
   - **c** Do not configure the system at this point.

NOTE

If you have already installed OpenLab CDS, you can run the Migration Tools from the OpenLab CDS Installer menu, provided it has not yet been configured (or Authentication set to “None”.) Use the instructions in **“Running the Migration Tools from the OpenLab Installer”** on page 79.

4 When the installer presents the Migration Settings, select the **Migrate Database** box. Fields appear for Export Packaging Location and Staging Location (**Figure 53**.)

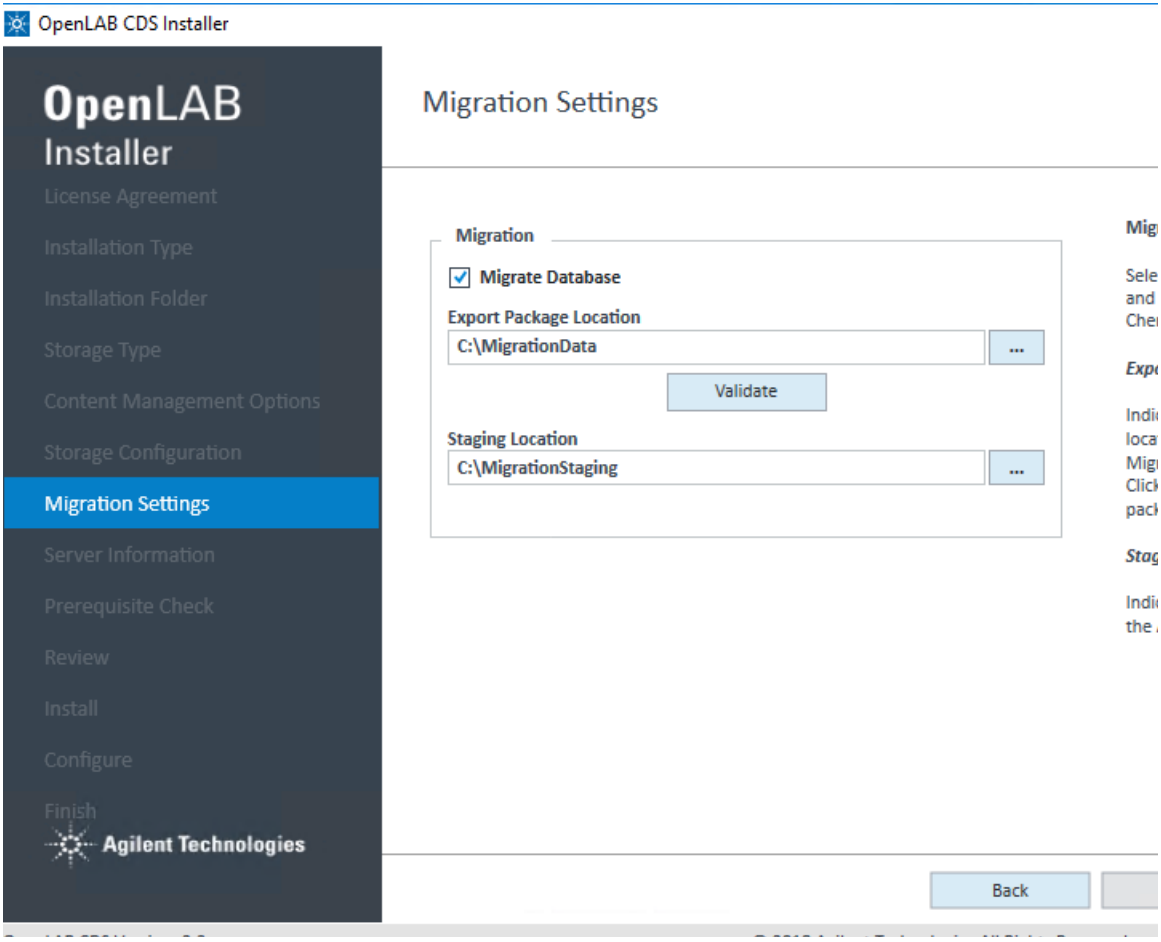


Figure 53. Migration Settings

5 Next to the Export Package Location, click ... and then browse to and select the folder where the AgilentExport package is located. (This is the folder containing the exported files created when you ran the Migration Tools to export your data.) (See **Figure 50** on page 69.)

6 Click **Validate** to verify the location and validate that it contains the export package.

7 Next to the Staging Location, click ... . Browse to a location on your local drive and select a folder. Or, create a folder to use as a staging location for the import data (**Figure 54**).

NOTE

The Staging Location folder must be empty.

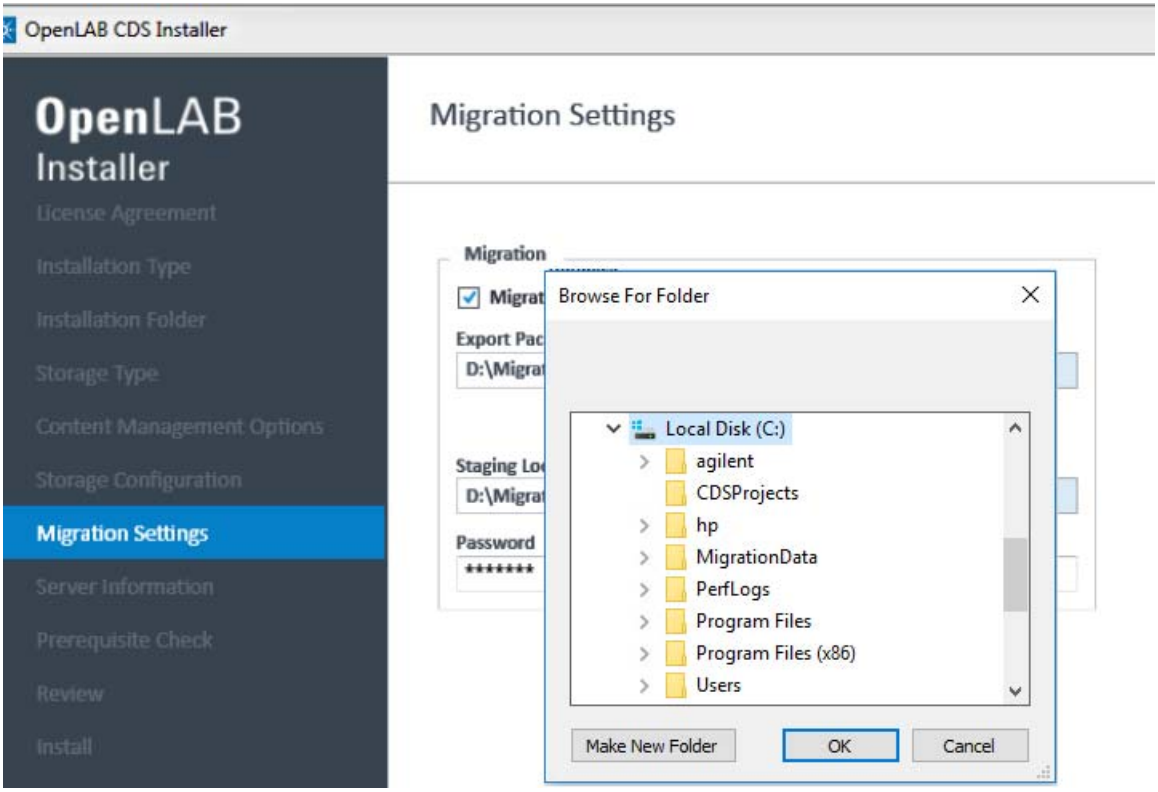


Figure 54. Create a folder for your Staging Location

8 If the installer determines that a password is necessary, the Default Password field will appear. For Internal authorization, type a password to be assigned to each imported user. (**Figure 55**) Users will be required to change this

password the first time they log into OpenLab CDS. For Windows Domain authentication, type the password for the Administrative user from the OpenLab CDS EZChrom Edition system.

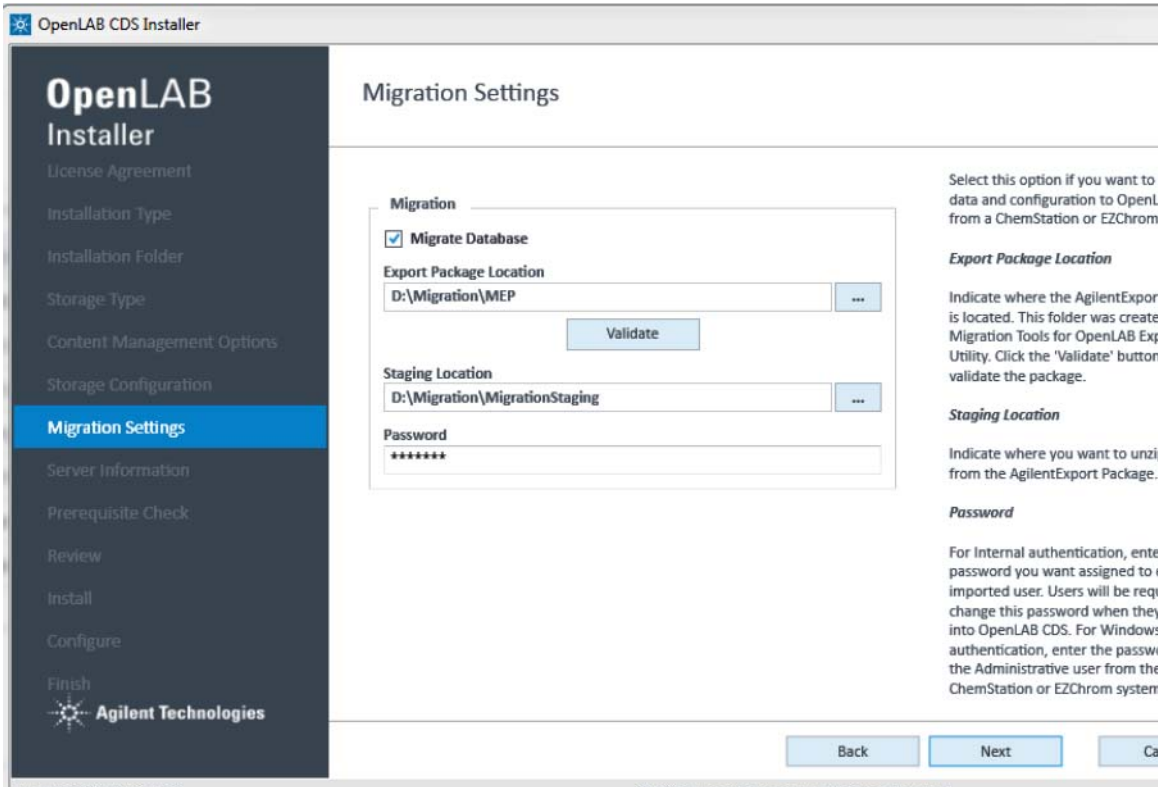


Figure 55. Setting a password

9 Click **Next** to continue and complete the installation. At the end of the installation procedure, successful importation of the data will be indicated as shown in **Figure 56.**

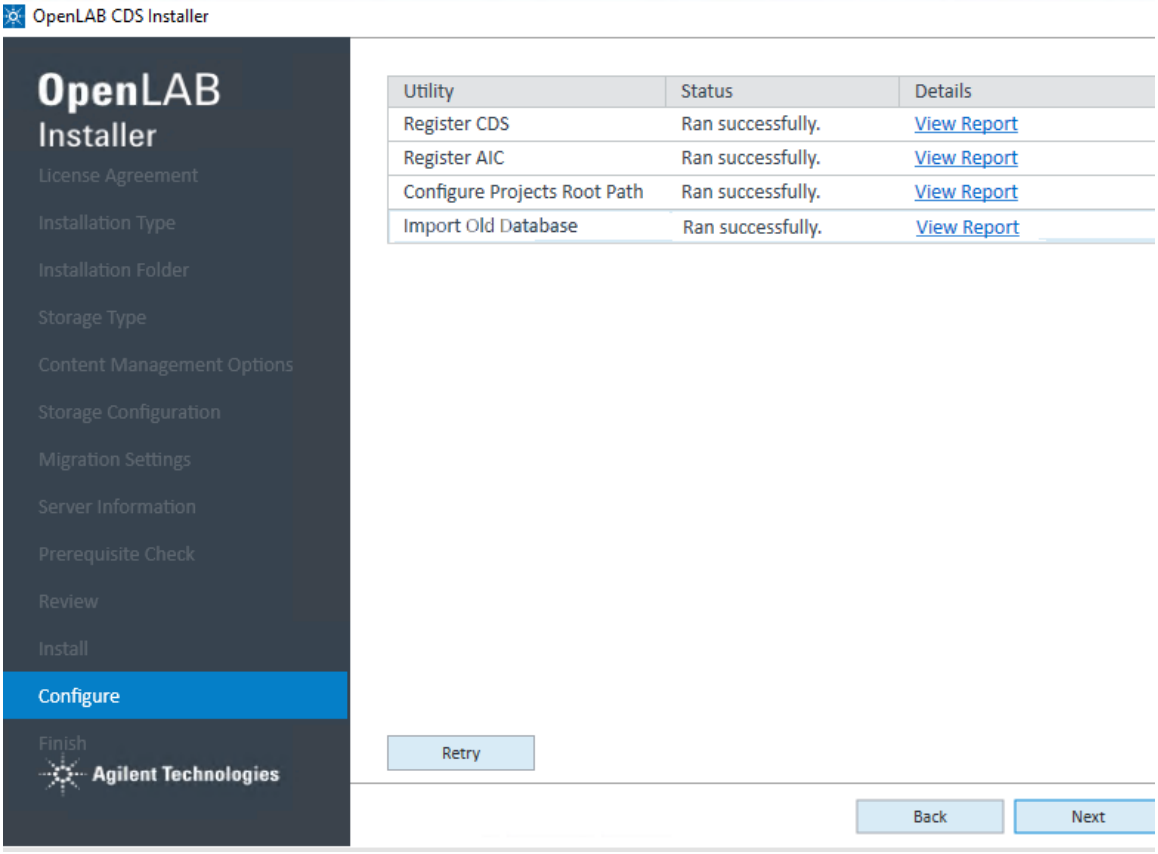


Figure 56. Successful installation and importation of migrated data

10 Click Next. The Installation Completed window appears (**Figure 57**.)

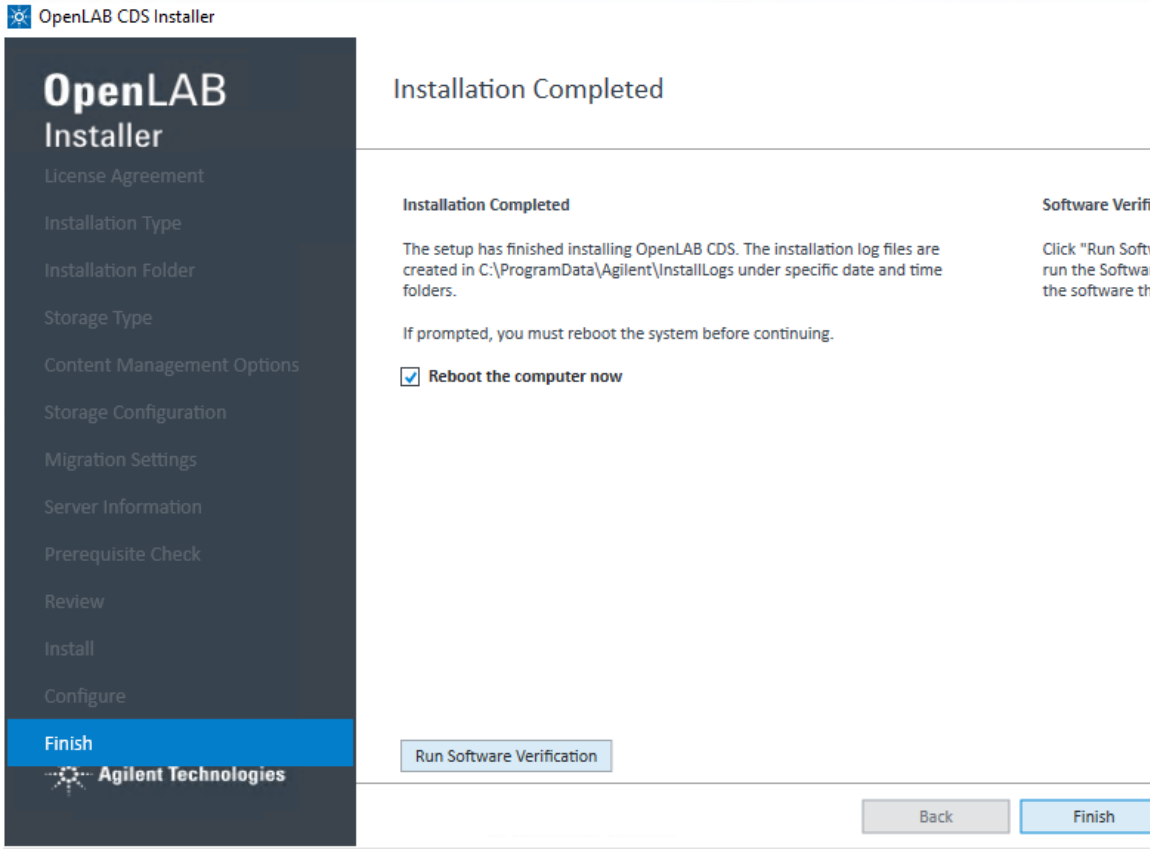


Figure 57. Installation completed

11 Click **Finish** to finish the installation and reboot the computer, or click **Run Software Verification** to run the software verification tool.

At this point, you should log into OpenLab CDS, where you will be prompted to change your password. Check that the data were imported correctly using the procedures described in **Chapter 5**, “Post-Migration Data Verification,” starting on page 91.

Running the Migration Tools from the OpenLab Installer

In situations where the Migration Tools are not executed successfully during installation of OpenLab CDS, use this procedure to run the Migration Tools from the OpenLab CDS installation media USB drive.

1. On the computer where your OpenLab CDS is installed, insert the OpenLab CDS version 2.x installation media USB drive, and migrate to the OpenLab CDS Migration Tools at **OpenLabCDS-2.x.\Setup\Tools\Migration**.
2. Select **Migration Tools for OpenLab**. The Migration Tools for OpenLab opens with the Planning tab displayed.
3. When the tool is running, click **Import** on the left side navigation pane.

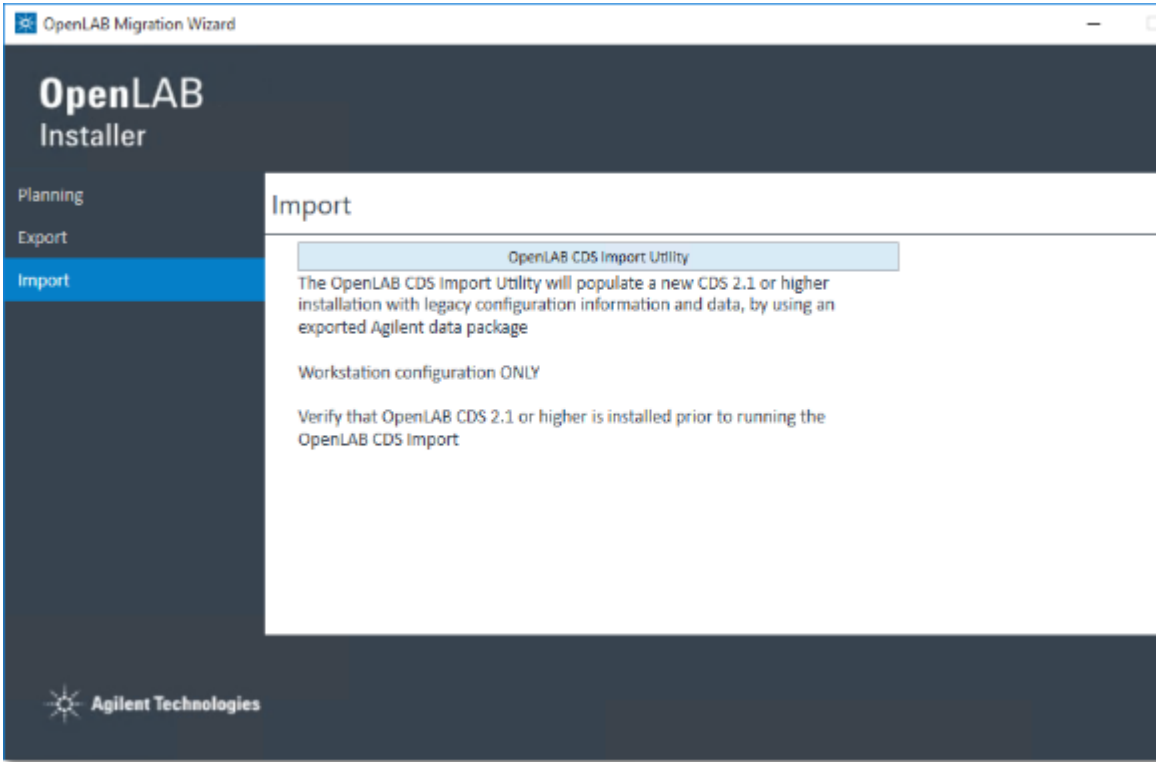


Figure 58. Migration Tools Import tab

4. Select **Migration Tools for OpenLab**. The Migration Tools for OpenLab opens with the Planning tab displayed.

5 When the tool is running, click **Import** on the left side navigation pane.

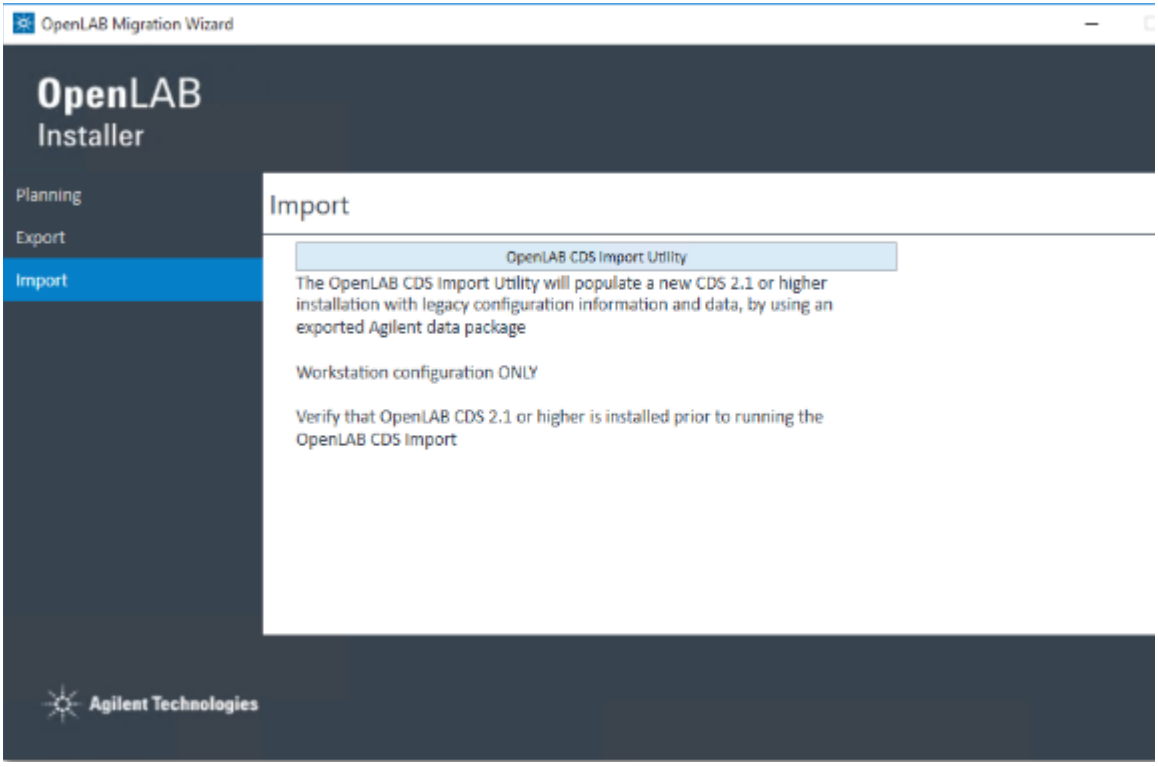


Figure 59. Migration Tool Import tab

6 Click **OpenLab CDS Import Utility** to launch the Import Utility, which enables you to set up and import the OpenLab CDS EZChrom Edition data to the OpenLab CDS machine.

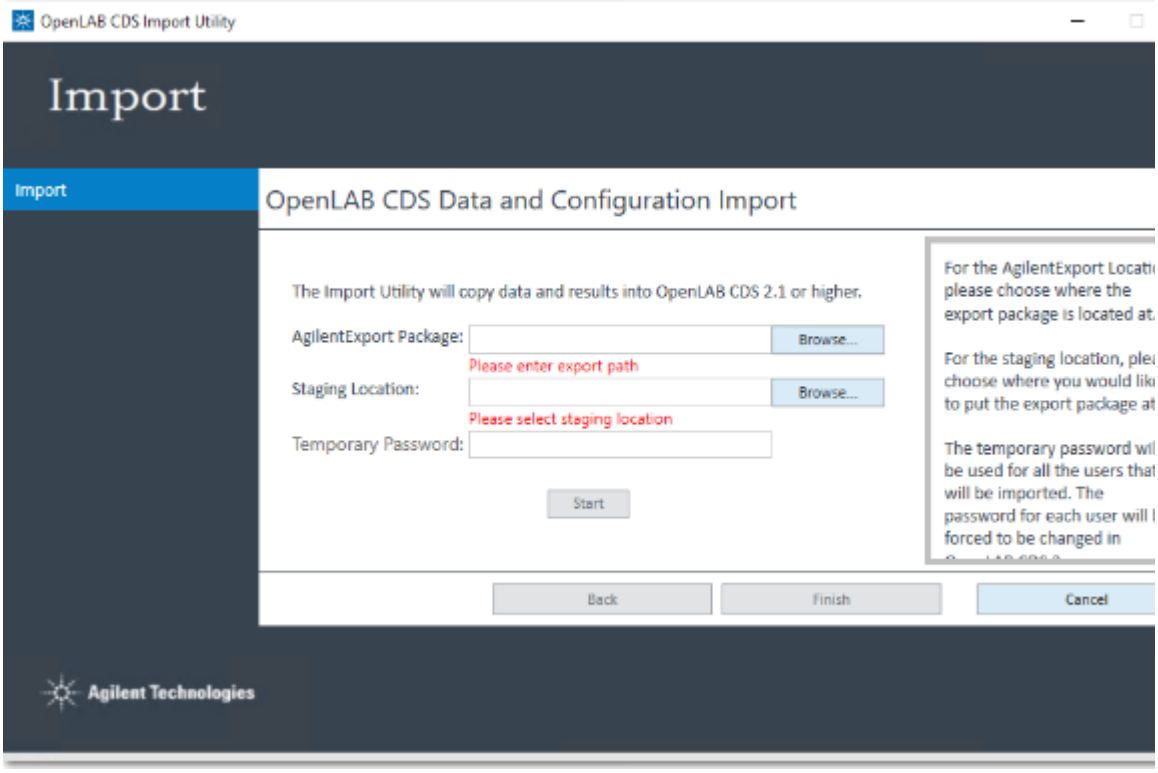


Figure 60. OpenLab CDS Data and Configuration Import

7 On the OpenLab CDS Data and Configuration Import screen, click **Browse** and navigate to the `AgilentExport` folder that was created on your export device after the export (see **Figure 13** on page 25). Select the whole folder, and click OK.

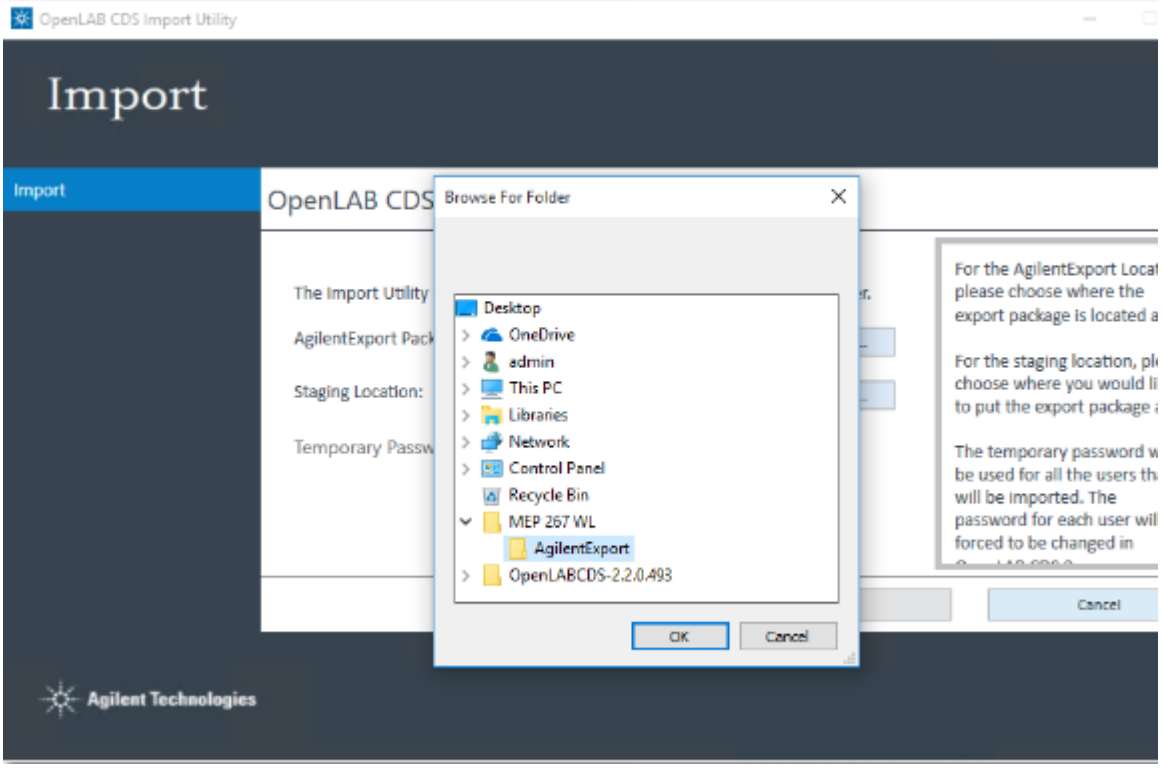


Figure 61. AgilentExport folder

8 Once you have selected the AgilentExport Package, next to the Staging Location, click **Browse**.

9 Browse to a location on your local drive and create a folder which to use as a staging location for the import data.

10 Click **OK**.

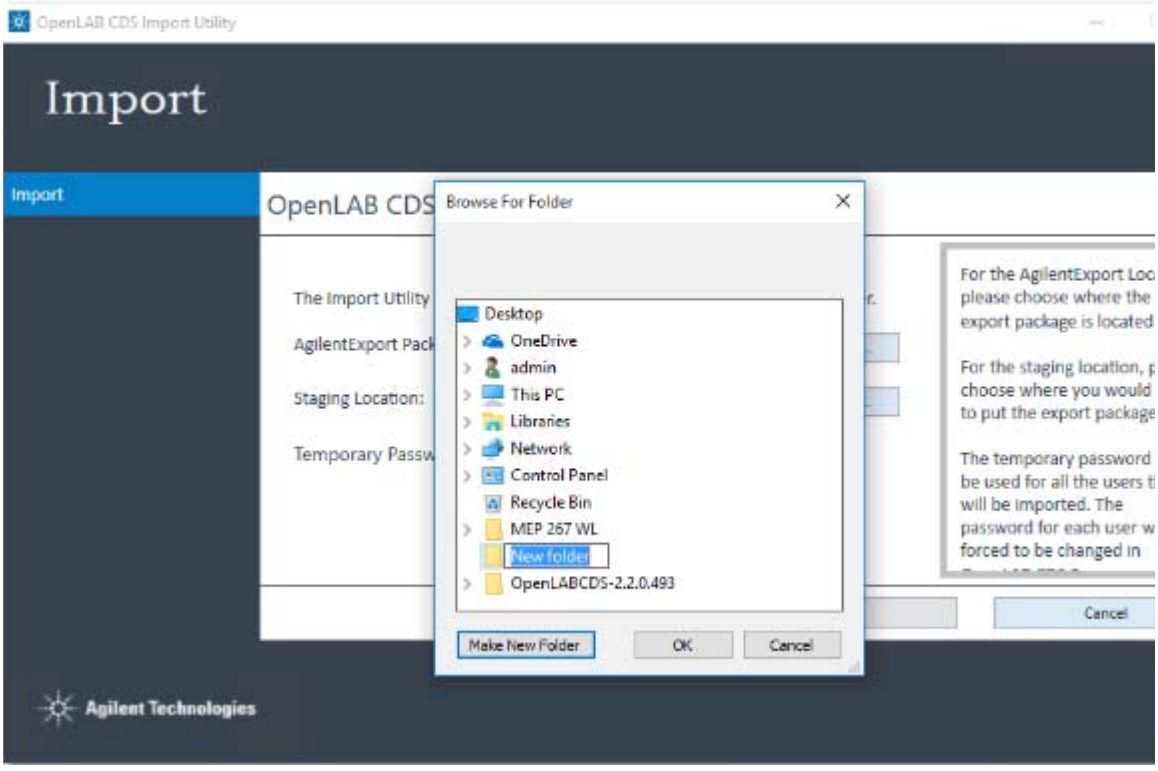


Figure 62. Creating a staging location folder

The Staging Location you created is filled in the Staging Location field.

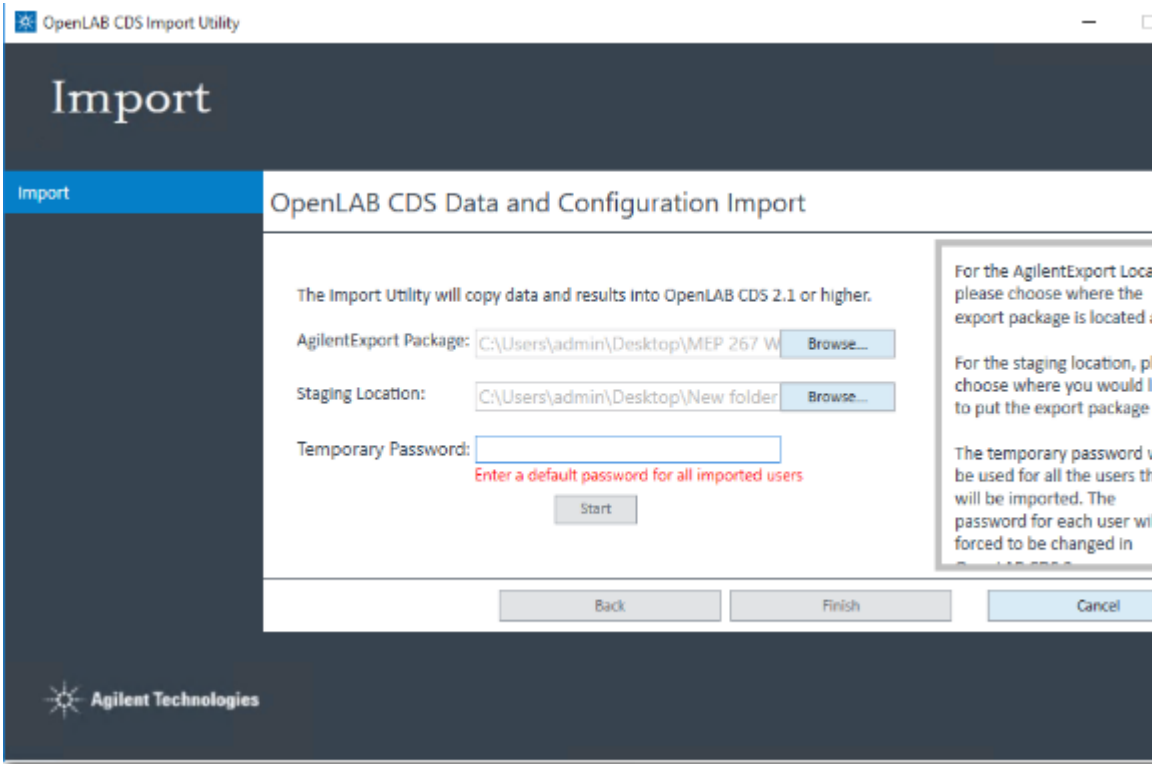


Figure 63. Import staging location selected

11 If you are using authentication, you are required to set a default password. Type the default password in the **Default Password** field. This password is enabled for all imported users. After logging on, each imported user is required to enter a new password.

NOTE

When Importing from OpenLab CDS EZChrom Edition without authentication, the Default Password field is unavailable.

When you correctly complete all fields, the **Start** button is enabled.

12 Click **Start** to begin the import process.

A status bar shows the import is in progress.

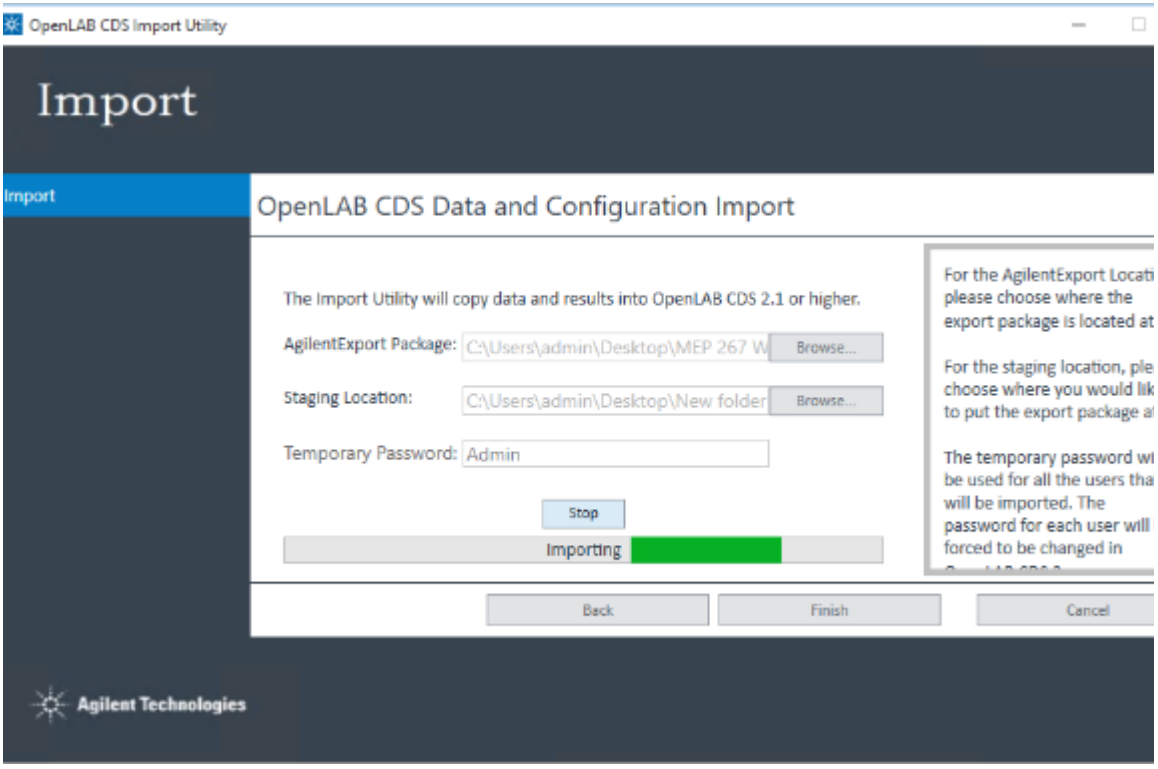


Figure 64. OpenLab CDS Data and Configuration Import progress

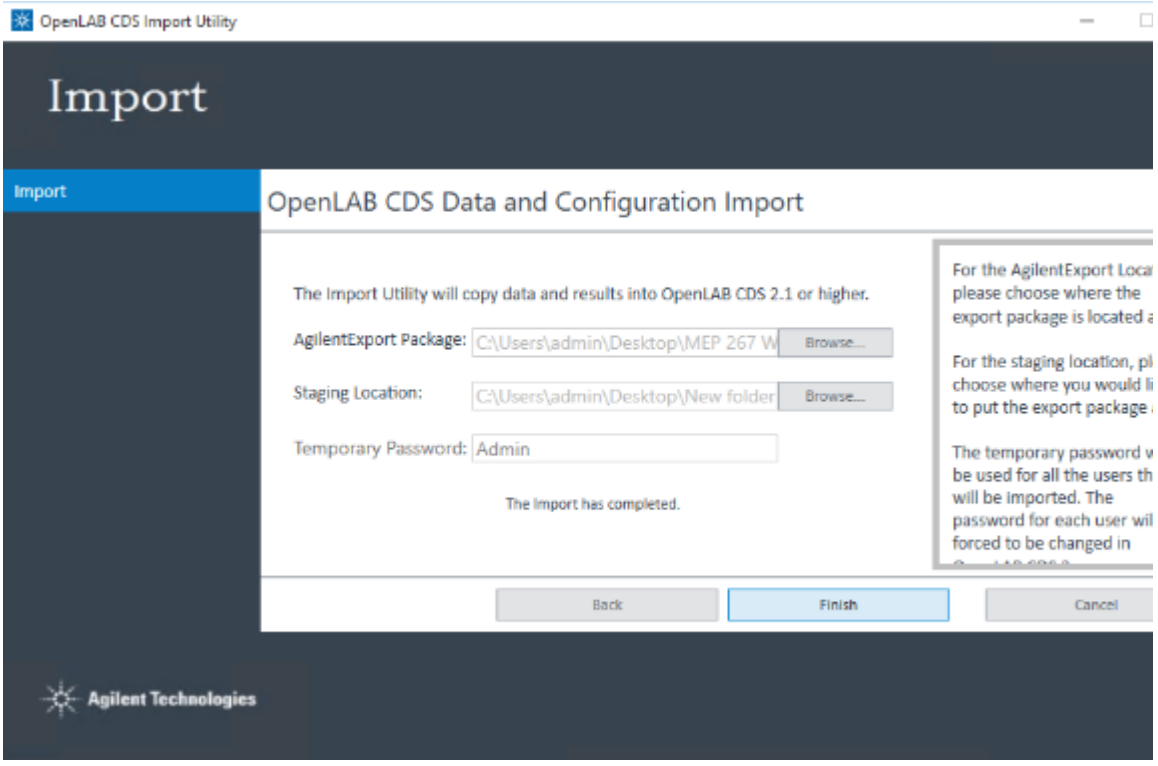


Figure 65. Import completed

13 Click **Finish** to complete the import process. The migration tool exits and the extracted files located in the staging location are removed.

You have successfully migrated your data to OpenLab CDS version 2.x.

What happens when data are imported

During the import process, the migration tool performs the tasks in the background in the following order:

a Automatically creates a default project group in the local OpenLab CDS Workstation installation called `EZChrom Data Archive_TimeStamp`, with subprojects for each EZChrom project.

b Extracts the data from the export package to the staging location.

c Imports the data so that OpenLab CDS Data Analysis can read them (**Figure 66**).

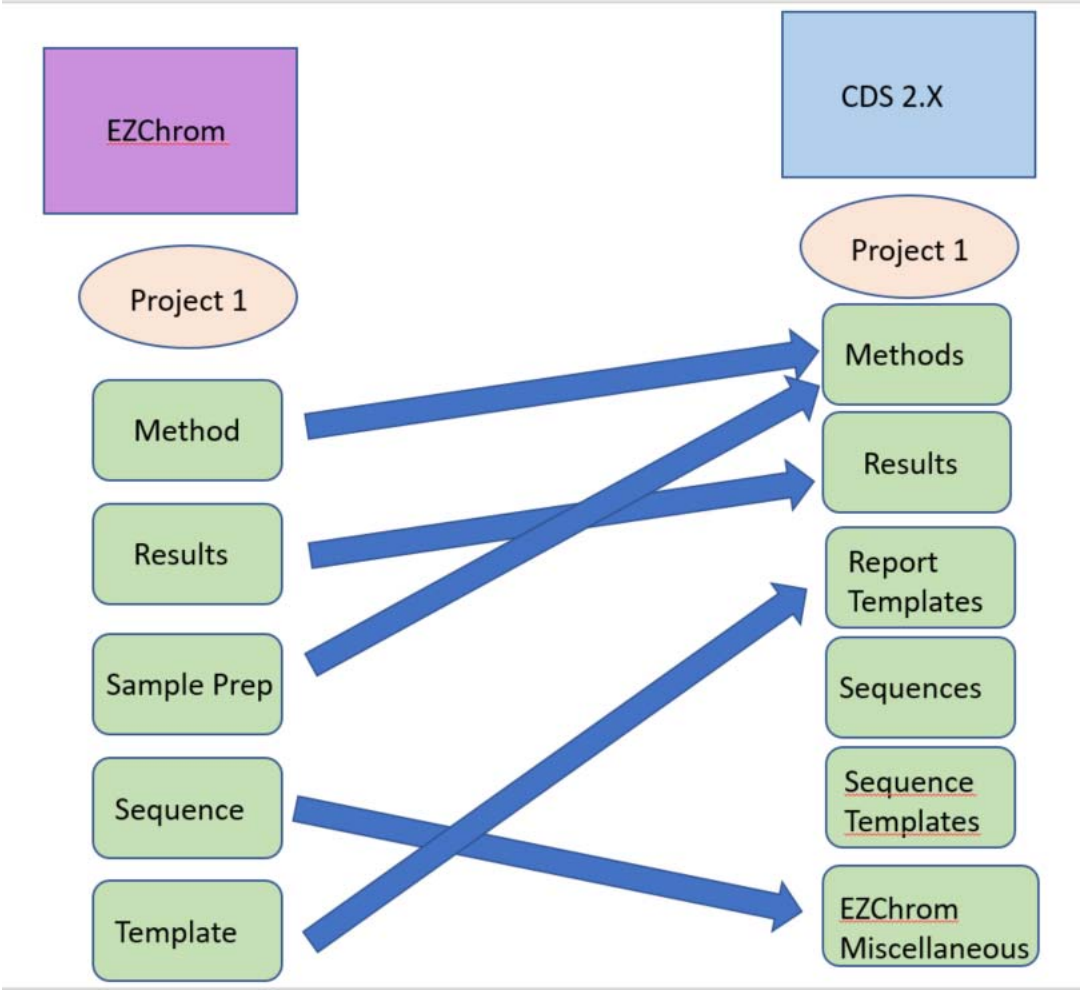


Figure 66. Reorganizing result data

d Creates projects in OpenLab CDS to match those from the OpenLab CDS EZChrom Edition installation.

e Creates users and groups in OpenLab CDS to match those from the OpenLab CDS EZChrom Edition installation.

f Creates roles in OpenLab CDS based on the configuration in the OpenLab CDS EZChrom installation.

g Recreates any active instruments from OpenLab CDS EZChrom Edition.

NOTE

Migration of the associations between instrument to different users with different projects is not supported and must be manually configured in OpenLab CDS 2.x. (In OpenLab CDS EZChrom, the setting for "Always use default project with this instrument" is unchecked.)

This page intentionally left blank.

5 Post-Migration Data Verification

Getting Started 92
Verifying Instruments 94
Verifying Projects 97
Verifying Users, Groups, and Roles 103

This chapter contains procedures for verifying the data and instrument information were migrated successfully.

NOTE The Migration Tool exports ChemStation B data and extracts it to the staging location only. No instruments, projects, or users/groups/roles are created on the OpenLab CDS Workstation version 2.x.

NOTE The screenshots and the corresponding information in this chapter contain sample data and will differ from what you see in your OpenLab CDS Control Panel.

Getting Started

Start the OpenLab CDS Control Panel.

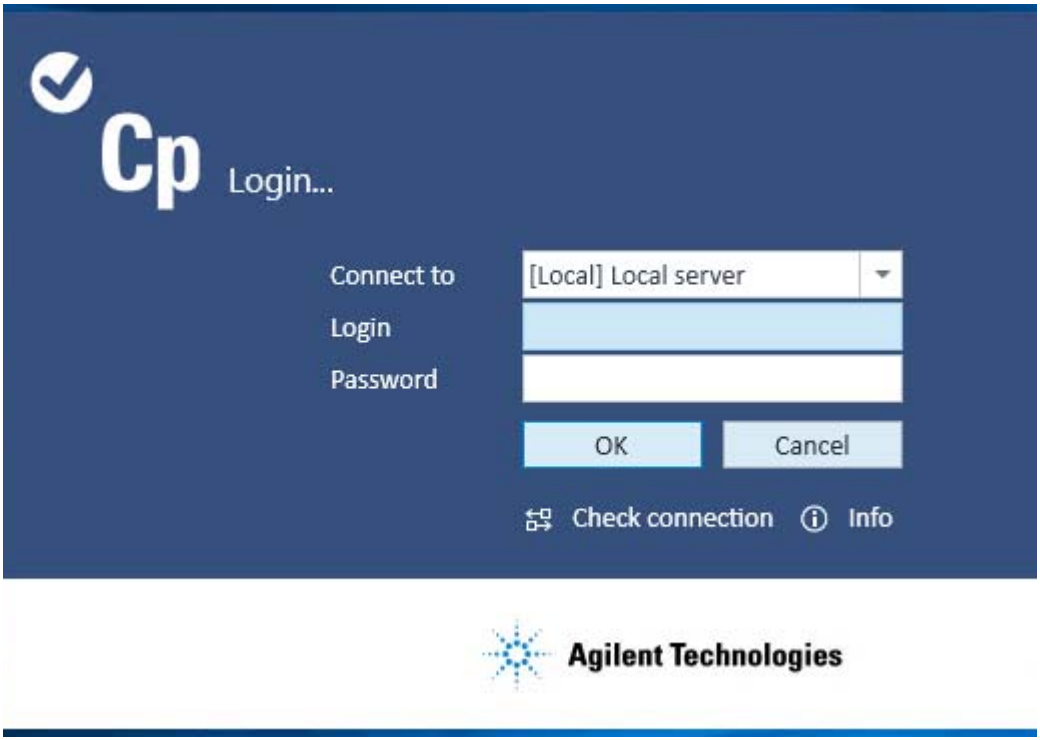


Figure 67. OpenLab CDS Control Panel login screen

Log in by completing the following fields, and then click **OK**.

Connect to - Set to (local) Local Server by default.

Login - Use any of your OpenLab CDS account usernames.

Password - Use the default password you set during the import (see page 46.)

Domain - If using Windows Domain security, this field appears. Select your domain.

NOTE

During the migration, passwords are reset, as they cannot be imported. You can reset the default password using the Administration tab in the Project View of the Control Panel.

If this is the first time you logged in after performing import, you must reset your password. Type the default password set during import, then type a new password and then type it again to confirm. Then click **OK**.

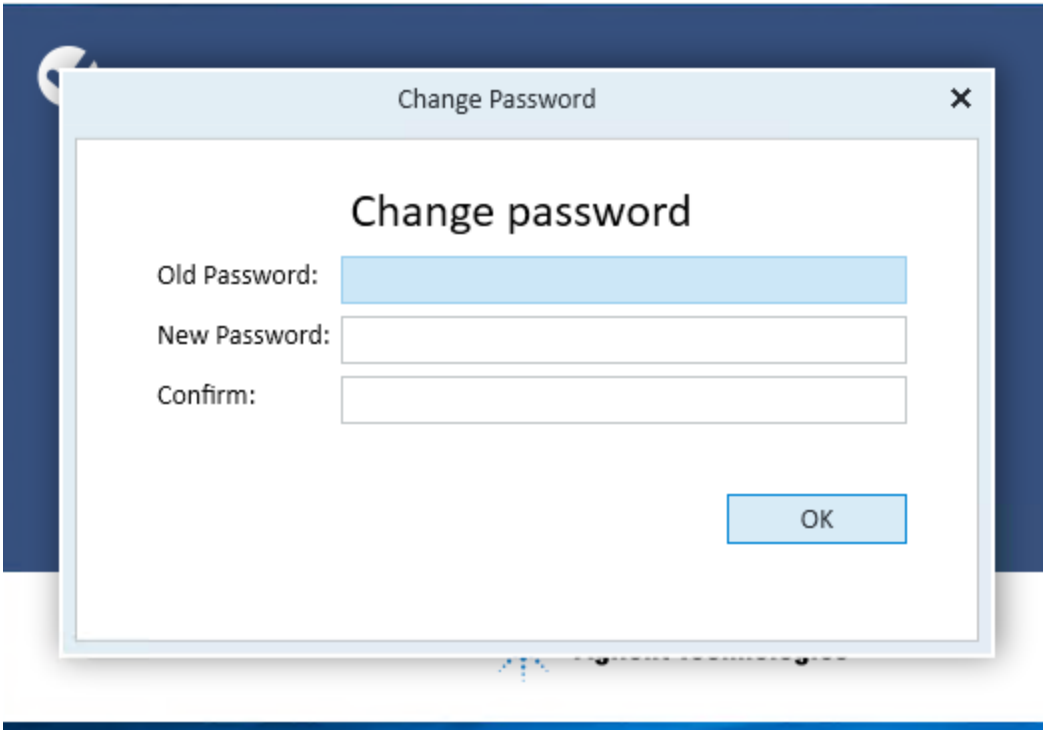


Figure 68. Change password from the default password used during import

Verifying Instruments

Perform the following steps to verify the instruments were imported successfully.

1. In the OpenLab CDS Control Panel, click **Instruments** at the bottom of the navigation pane.
2. Expand the instruments menu and click on the Instrument group. (**Figure 69**).

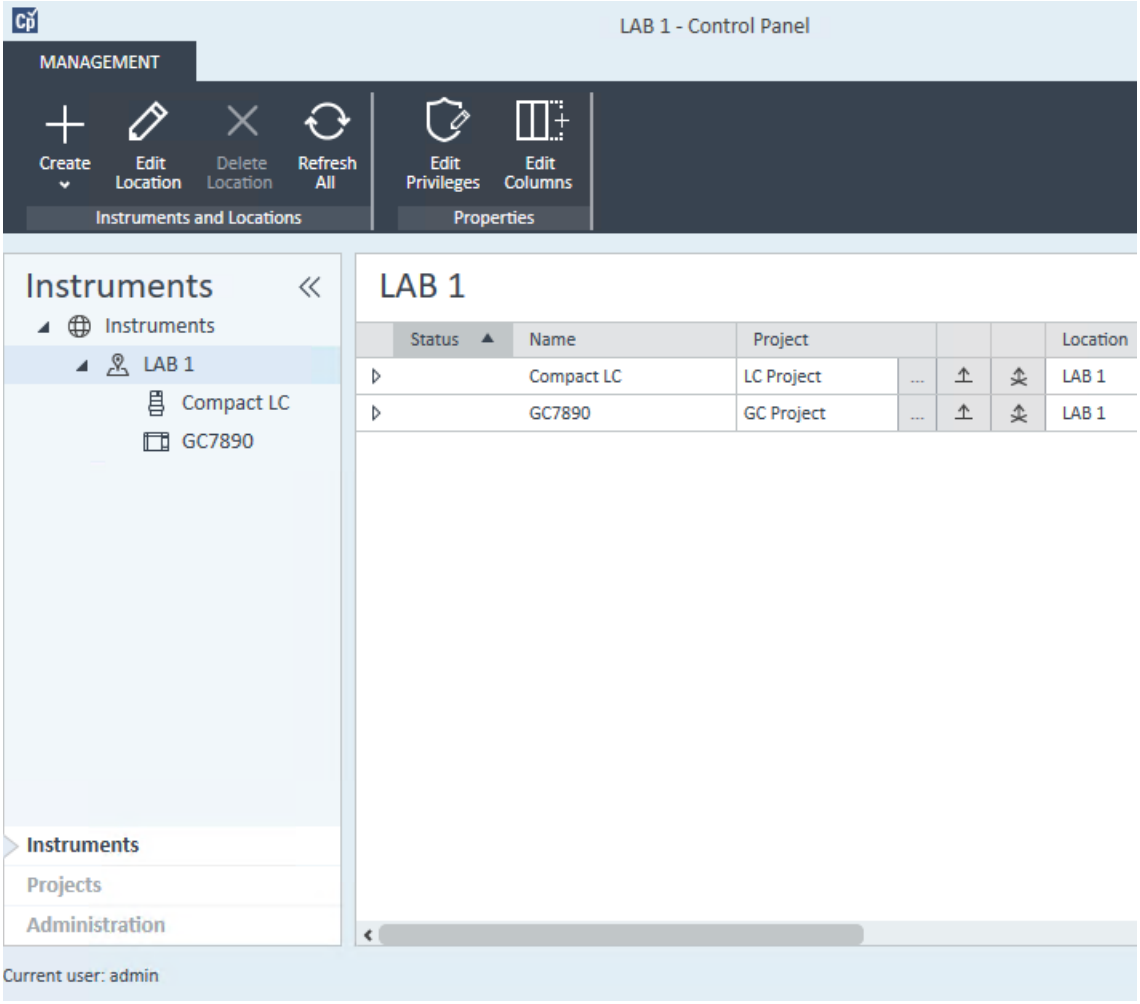


Figure 69. Control Panel Instruments Tab

3 To configure an instrument, select it and click **Configure Instrument** on the ribbon bar. The Configuration screen appears (**Figure 70**).

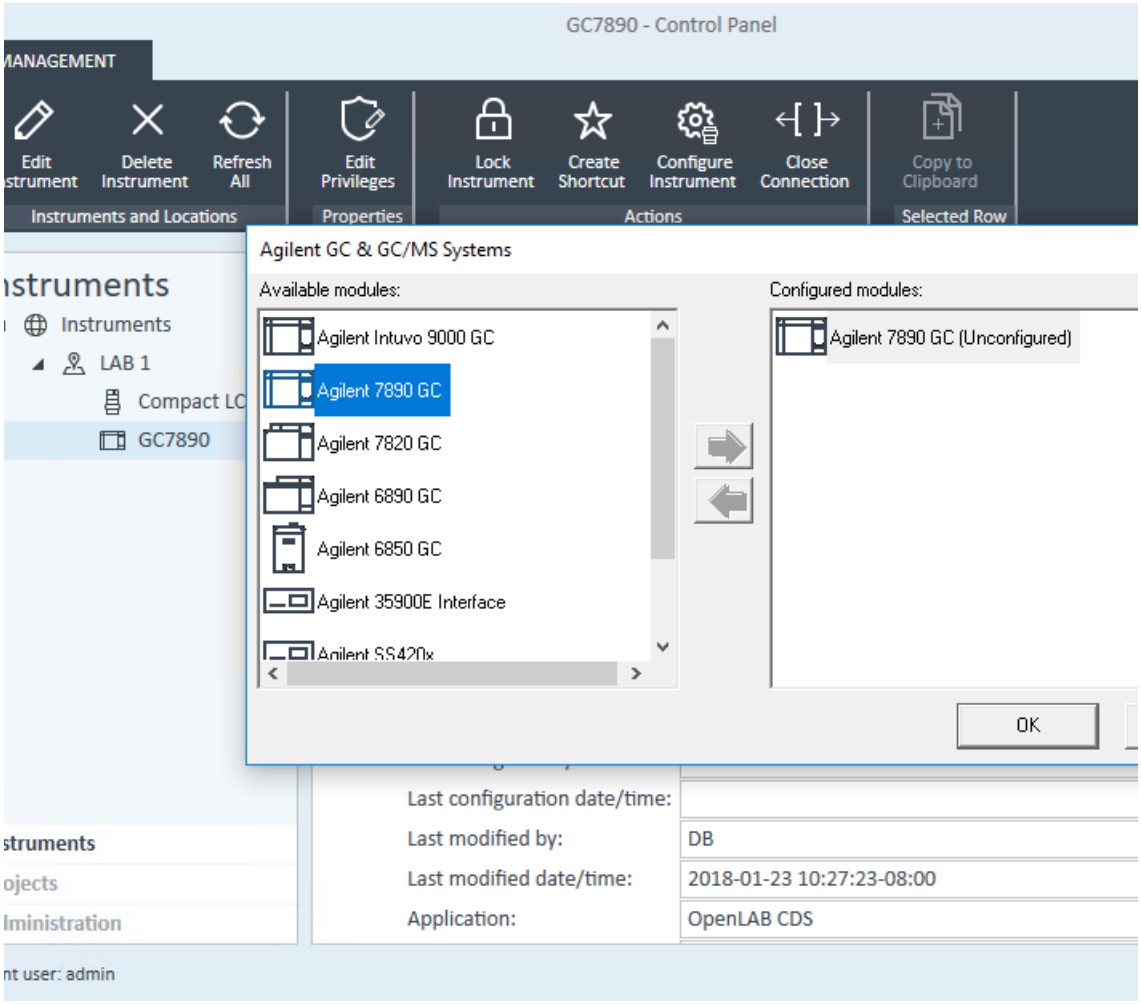


Figure 70. Instrument configuration screen

4 You are ready to configure the selected instrument. Be sure to configure all the instruments that appear in the Instruments group.

For complete information on configuring instruments, refer to the OpenLab CDS online help.

Verifying Projects

Perform the following steps to ensure that the Projects were created successfully.

For OpenLab CDS ChemStation projects

1 In the OpenLab CDS Control Panel, click **Projects** on the bottom left in the navigation pane.

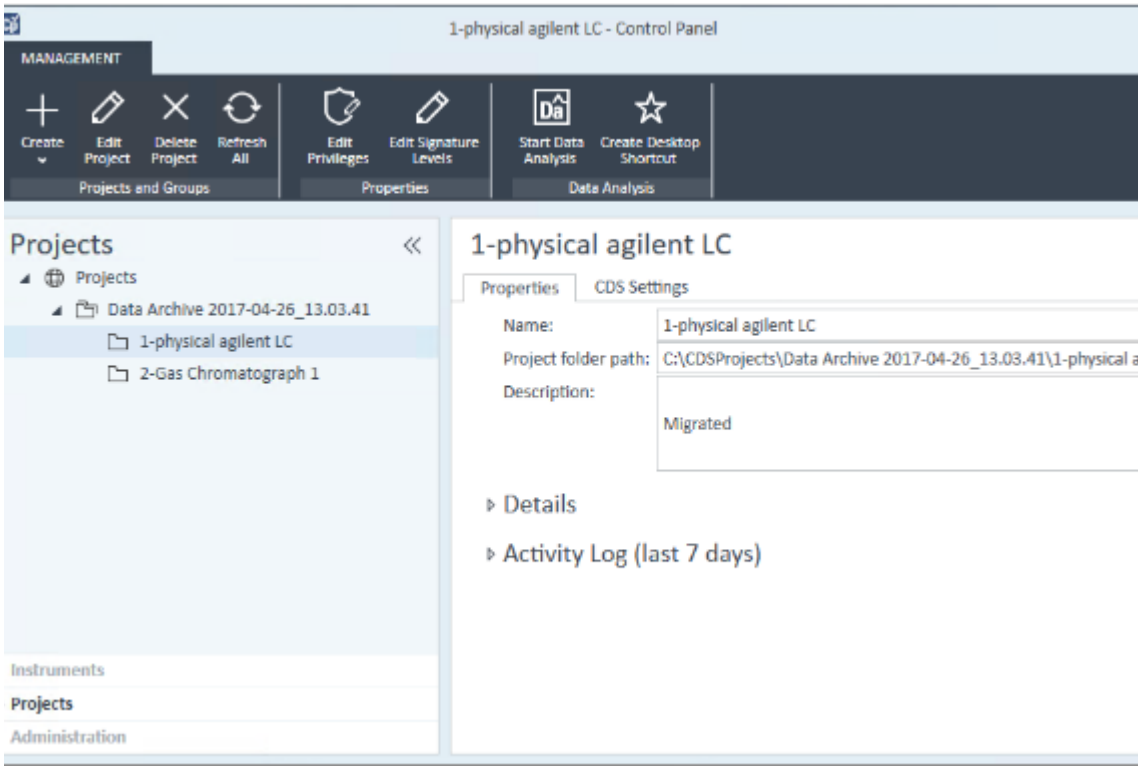


Figure 71. Control Panel Projects for migrated from OpenLab CDS ChemStation Edition

2 Expand the project groups to view the list of projects. You will see projects named for each imported instrument. If there is a deleted instrument, the

project corresponding to that instrument appears as *instrumentname_000* in the project list.

3 Click a project to select it.

4 Click **Start Data Analysis** on the top command bar.

The Data Analysis application launches (**Figure 72**).

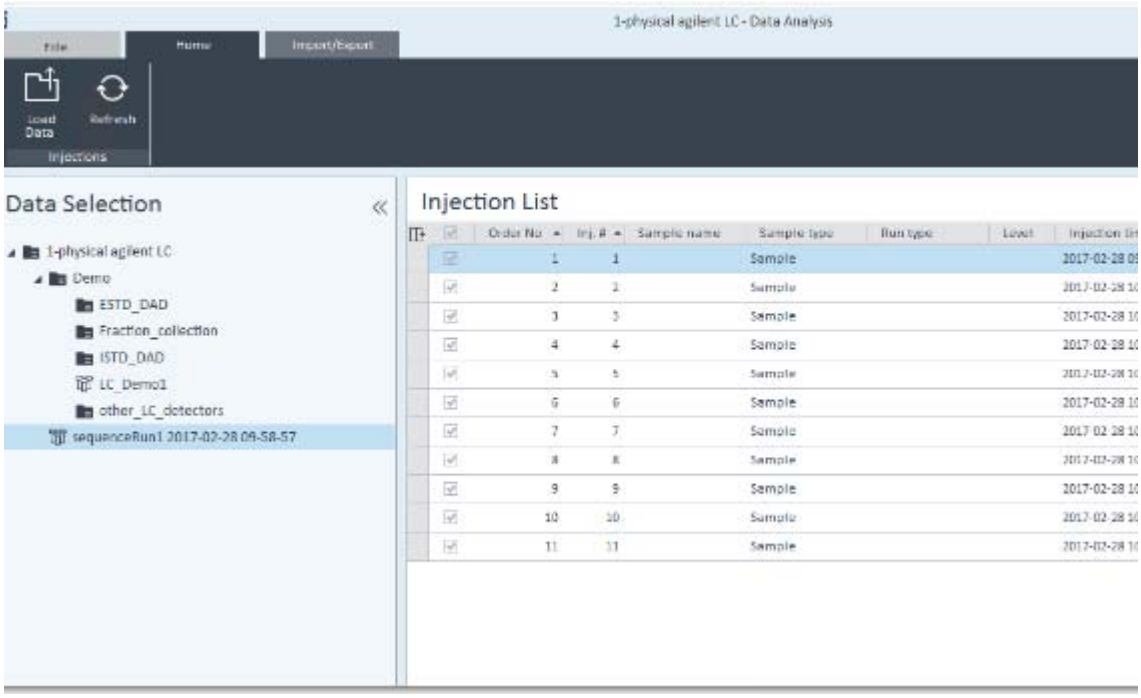


Figure 72. OpenLab CDS Data Analysis

5 In the navigation pane on the left, select the result and click **Load Data** on the command bar to view the data (**Figure 73**). To view single run results, click on the project group.

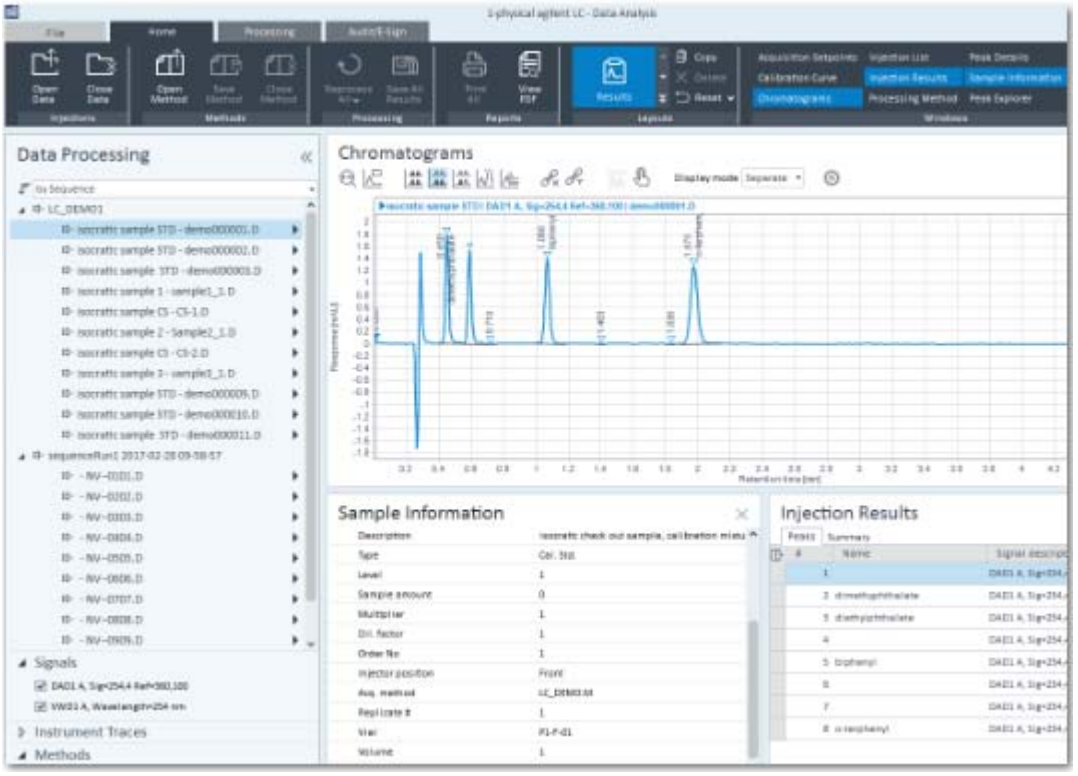


Figure 73. Imported data displayed in Data Analysis

For OpenLab CDS EZChrom projects

1 In the OpenLab CDS Control Panel, click **Projects** on the bottom left in the navigation pane.

NOTE

Migration of the associations between instrument to different users with different projects is not supported and must be manually configured in OpenLab CDS 2.x. (In OpenLab CDS EZChrom, the setting for "Always use default project with this instrument" is unchecked.)

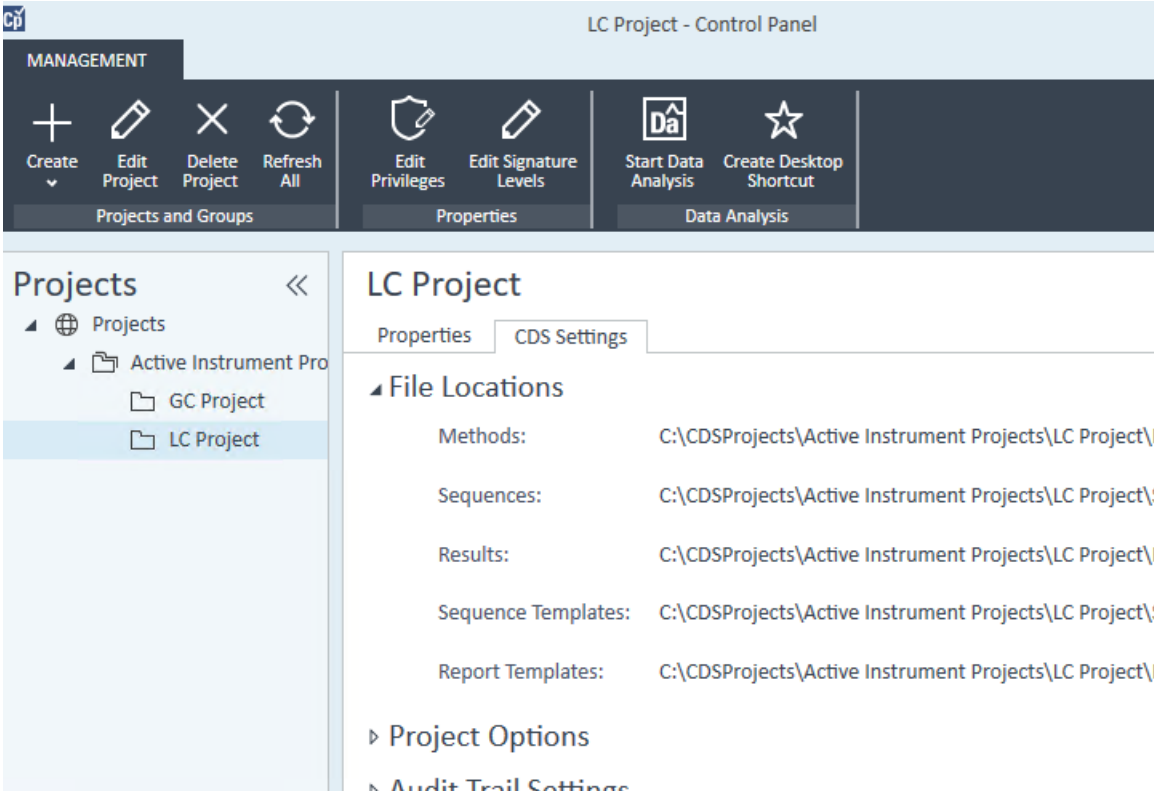


Figure 74. Control Panel projects for migrated from OpenLab CDS EZChrom Edition

2 Expand the project groups to view the list of projects.

3 Click a project to select it.

4 Click **Start Data Analysis** on the top command bar.

The Data Analysis application launches.

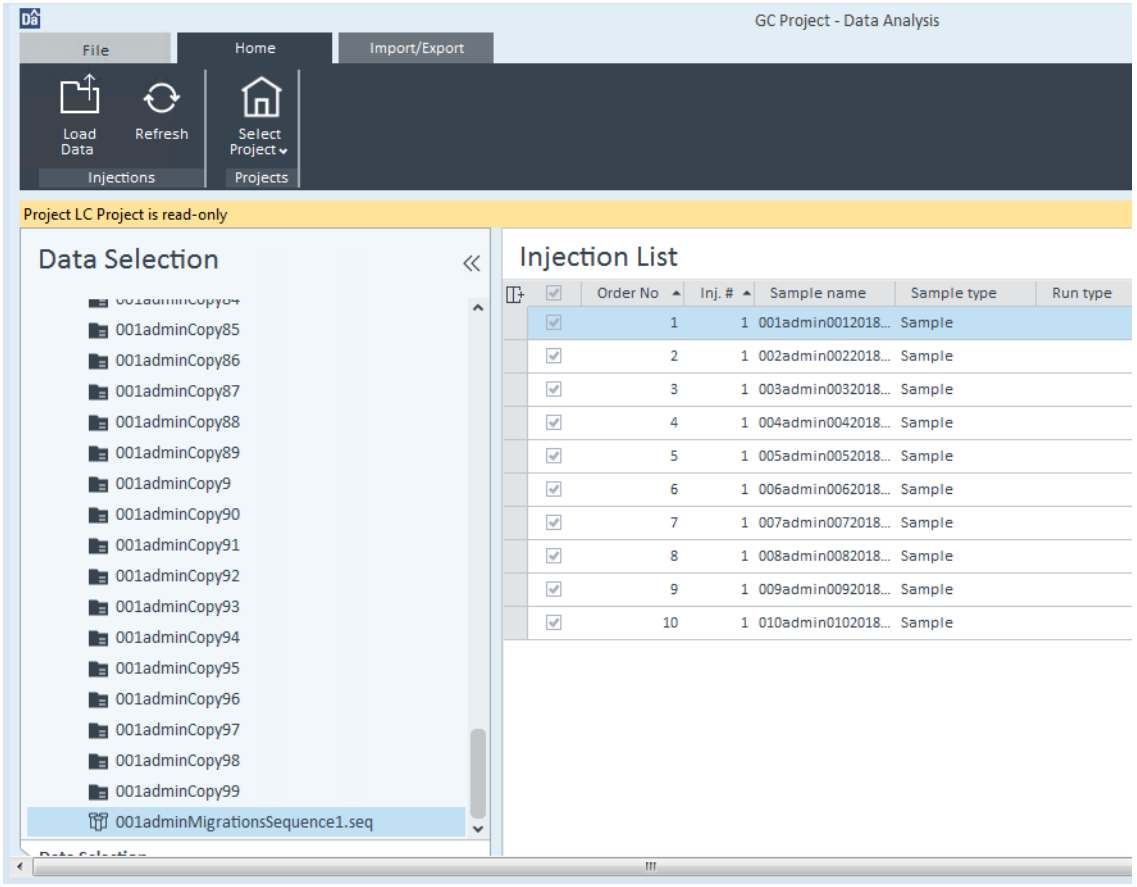


Figure 75. OpenLab CDS Data Analysis

5 In the navigation pane on the left, select the result and click **Load Data** on the command bar to view the data (**Figure 76**). To view single run results, click on the project group.

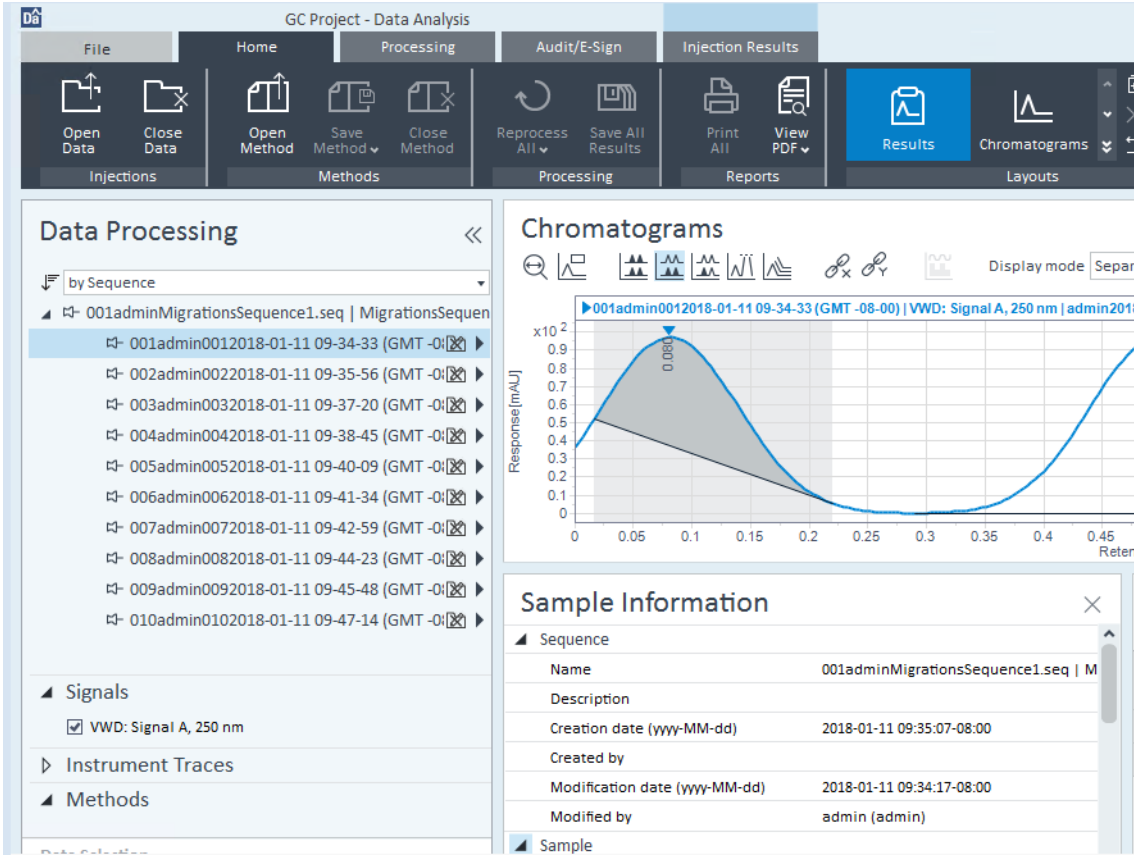


Figure 76. Imported data displayed in Data Analysis

Verifying Users, Groups, and Roles

Perform the following steps to ensure that Users, Groups, and Roles were imported successfully.

1. In the OpenLab CDS Control Panel, click **Administration** on the bottom left navigation pane. You will see selections for **Users**, **Groups**, and **Roles** listed in the Administration navigator.
2. Click **Users** and **Groups** in the navigation pane as desired to review the imported information (**Figure 77**).

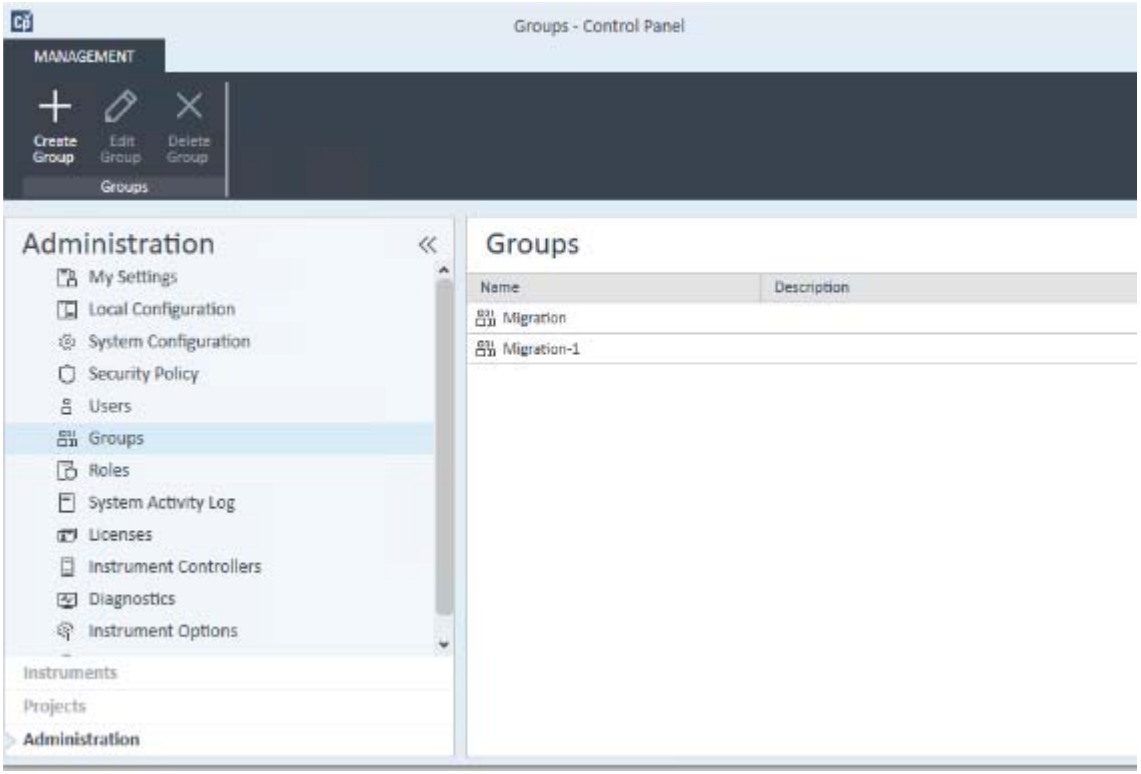


Figure 77. OpenLab CDS Groups

3 Ensure that the users, groups, and custom roles that you created were migrated successfully (**Figure 78**).

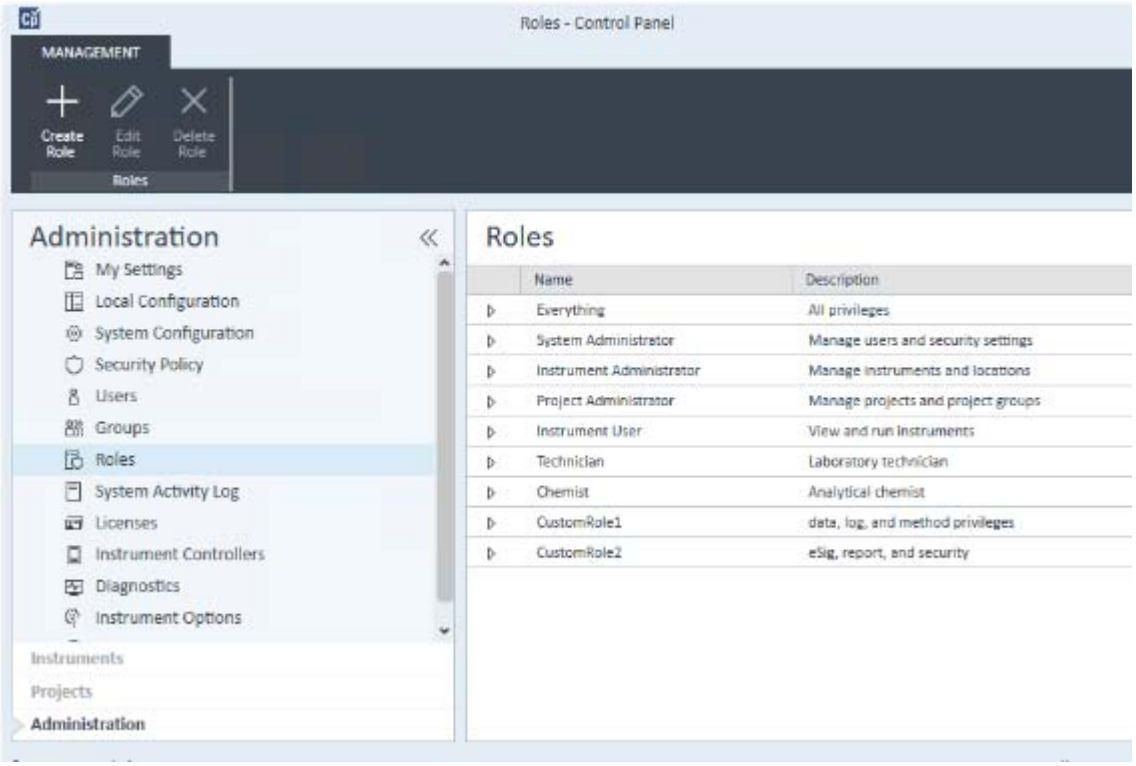


Figure 78. OpenLab CDS Roles

You have completed the verification steps to ensure that the data were migrated successfully.

To complete the migration, complete the migration of your methods. For information on how to migrate methods, see the Migration Guide that is appropriate for the product you are migrating.

Sequences created in OpenLab CDS ChemStation Edition or OpenLab CDS EZChrom Edition cannot be used directly in OpenLab CDS 2.x. They must be recreated in OpenLab CDS 2.x.

6 Troubleshooting

Migration Tools for OpenLab Issues 106
Export Issues 107
Import Issues 109

This chapter provides information about some common errors that you may encounter while migrating data from OpenLab CDS ChemStation Edition or OpenLab CDS EZChrom Edition to OpenLab CDS 2 using the Migration Tools for OpenLab.

NOTE

Figures displayed are for OpenLab CDS ChemStation Edition. However, errors described apply to using the Migration Tools for OpenLab with either OpenLab CDS ChemStation Edition or OpenLab CDS EZChrom Edition.

Migration Tools for OpenLab Issues

- Migration Tools for OpenLab cannot launch due to .NET incompatibility
- Migration Tools for OpenLab Planning page documentation cannot open

Export Issues

- Export destination must be empty
- No active instruments detected
- Could not find a part of the path
- Access to the path is denied
- Access to export destination path is denied

Import Issues

- A supported version of OpenLab CDS was not found
- User authentication incorrectly set up
- Export package descriptor file not found

Migration Tools for OpenLab Issues

This section contains issues related to the Migration Tools for OpenLab.

Migration Tools for OpenLab cannot launch due to .NET incompatibility

Cause This error may appear on older Windows 7 32-bit machines.

Solution Migration Tools for OpenLab requires that .NET 4.5 is installed. Refer to the documentation links on the Planning page of the Migration Tools for OpenLab for additional information.

Migration Tools for OpenLab Planning page documentation cannot open

Cause This error occurs when you cannot open a PDF from the Planning page of the Migration Tools for OpenLab.

Solution To open the links on the Planning page of the Migration Tools for OpenLab, a PDF reader must be installed. Click on the Adobe Acrobat link on the Planning page to install the PDF reader. The OpenLab CDS ChemStation Edition and OpenLab CDS 2 install packages also have links to PDF reader software.

Export Issues

This section contains issues related to the export process.

Export destination must be empty

Cause This error occurs when the Export package is placed in a folder that is not empty.

Solution The Export package must be placed into an empty folder. You are given the option to make a new empty folder within the browser dialog.

No active instruments detected

Cause This error occurs when no active instruments are detected.

Solution If the OpenLab CDS ChemStation Edition or OpenLab CDS EZChrom Edition does not have any active instruments, you can continue with the export. Data from deleted or inactive instruments are carried over, but no new instruments are created after import. If there are active instruments to carry over, log into OpenLab CDS ChemStation Edition or OpenLab CDS EZChrom Edition and ensure that the instruments are configured correctly.

Could not find a part of the path

Cause This error occurs when the system cannot find the specified folder.

Solution Ensure that the path entered is correct.

Access to the path is denied

Cause This error occurs when you do not have access to the target folder (for OpenLab CDS ChemStation Edition, this is C:\ Chem32).

Solution Ensure that you have the appropriate Windows permissions to access the target folder. A Windows user with administrative privileges should run the Migration Tools for OpenLab.

Access to export destination path is denied

Cause This error occurs when you attempt to set the Export Destination path to a folder that you do not have access to.

Solution Place the Export package in a location that is accessible. A Windows user with administrative privileges should run the Migration Tools for OpenLab.

Import Issues

This section contains issues related to the import process.

A supported version of OpenLab CDS was not found

Cause This error occurs when the Migration Tools for OpenLab cannot find an OpenLab CDS installation.

Solution This might happen if no OpenLab CDS installation is present, or if an unsupported version of OpenLab CDS is installed.

User authentication incorrectly set up

Cause This error occurs if you have incorrectly set up your OpenLab CDS workstation installation with internal authentication.

Solution You must have an OpenLab CDS workstation installation set up with no authentication.

Export package descriptor file not found

Cause This error occurs when the Import Utility cannot find the `package.descriptor` file.

Solution This is most likely because an invalid folder has been selected. The folder named `AgilentExport`, which is created by the Export Utility, must be selected.

In This Book

This guide provides step-by-step instructions for migrating data, instrument information, and user information, from OpenLab CDS ChemStation Edition, ChemStation, and OpenLab CDS EZChrom Edition to OpenLab CDS Workstation version 2.4 using the Migration Tools for OpenLab (Migration Tools).

www.agilent.com

© Agilent Technologies, Inc. 2019

Rev. D, January 2019

M8413-90030