SoftMax® Pro Data Acquisition and Analysis Software

GxP Edition

SoftMax Pro Software - GxP Edition version 7.1.1, GxP Admin Software version 3.0.1

Installation Guide for the Single Computer Setup

MOLECULAR DEVICES

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Chapter 1: Introduction

The SoftMax® Pro 7.1.1 GxP Compliance Software Suite controls Molecular Devices® spectrophotometers and absorbance, luminescence, and fluorescence microplate readers and detection platforms.

Note: In this document, all references to the SoftMax Pro Software - GxP edition use the term SoftMax Pro GxP Software.

This document is specifically for the GxP Admin Software version 3.0.1 and SoftMax Pro GxP Software version 7.1.1.

- The GxP Admin Software version 3.0.1 is not compatible with any SoftMax Pro GxP Software prior to version 7.1.1.
- The SoftMax Pro GxP Software versions prior to version 7.1 must be used with GxP Admin Software version 2.x.

Note: The GxP Admin Software has no user interface. The version number for the GxP Admin Software displays in the bottom left corner of the GxP Admin Portal.

Scalability

The SoftMax Pro 7.1.1 GxP Compliance Software Suite scales with the size of your laboratory environment. Depending on the size of your implementation, you can install the interdependent SoftMax Pro 7.1.1 GxP Compliance Software Suite components on multiple networked computers. For the smallest of implementations, it is possible to install the components on a single computer. You should consult with your Molecular Devices representative and your network administrators to plan and scale your implementation according to your requirements.

SoftMax Pro 7.1.1 GxP Compliance Software Suite components:

- **GxP Admin Software**: The GxP Admin Software (server) is the database and security back-end application that you install on a dedicated, centrally located server with a static IP address. This server must be accessible to all computers that run the GxP Admin Portal Software and the SoftMax Pro GxP Software. The GxP Admin Software does not have a user interface.
- **GxP Admin Portal Software**: The GxP Admin Portal is the user interface that you use to interact with the GxP Admin Software. Install the GxP Admin Portal Software on a computer or computers that have access to the dedicated server on which you install the GxP Admin Software.
- **SoftMax Pro GxP Software**: The SoftMax Pro GxP Software (client) controls the microplate reader for data acquisition and statistical data analysis. These computers must have access to the dedicated server on which you install the GxP Admin Software.

This scalability has changed the way the software is installed, validated, and supported.

- **SoftMax Pro Software Standard Edition and MiniMax Imaging Edition** - There is no version 7.1.1 for the SoftMax Pro Software Standard edition or the SoftMax Pro MiniMax Imaging edition. You cannot update these editions to version 7.1.1. The current update path is to update from version 7.0.3 (or earlier) to version 7.1.
- **SoftMax Pro Software GxP Edition** - There are two methods to deploy the SoftMax Pro Software - GxP edition:
  - Multi Computer Setup - This setup supports multiple microplate readers connected to multiple computers and Windows Credential login mode. All computers in the multi computer setup are networked to one central secure Microsoft SQL database that you install separately.
  - Single Computer Setup - This setup means that the computer connected to the microplate reader is also the same computer that houses all components of the SoftMax Pro 7.1.1 GxP Compliance Software Suite. This is the only computer that runs the SoftMax Pro GxP software and the only computer that acquires data from the microplate reader. The SoftMax Pro 7.1.1 GxP Single Computer Setup Installation Wizard installs a Microsoft SQL Express database on the computer. The installed database can store up to 10 GB of data with the related System Audit Trail records.

SoftMax Pro 7.1.1 GxP Compliance Software Suite Update Path

CAUTION! If you update the SoftMax Pro Software - GxP edition from a version prior to 7.1, the update to SoftMax Pro Software - GxP edition version 7.1.1 requires time and training to implement. Please contact Technical Support for assistance. See Obtaining Support on page 45.

For the SoftMax Pro Software - GxP edition, the only change between version 7.1 and version 7.1.1 is to remove the dependency on the Docker Desktop application. If you update from SoftMax Pro Software - GxP edition version 7.1 to version 7.1.1 there is no change to the software workflow. This requires a new installation. The database can be migrated.

See the following documents for details:

- *SoftMax Pro Data Acquisition and Analysis Software Standard Edition and MiniMax Imaging Edition Installation Guide*
- *SoftMax Pro Data Acquisition and Analysis Software - GxP Edition - Installation Guide for the Multi Computer Setup*
- *SoftMax Pro and SoftMax Pro GxP Validation Package User Guide*
- *SoftMax Pro Data Acquisition and Analysis Software User Guide*
- *GxP Admin Software User Guide*

Chapter 2: Important Software Installation Considerations

2

Use the instructions in this guide to install the SoftMax Pro 7.1.1 GxP Compliance Software Suite on a single computer.

CAUTION! You cannot use the SoftMax Pro 7.1.1 GxP Single Computer Setup Installation Wizard to install the SoftMax Pro 7.1.1 GxP Compliance Software Suite on a computer that has version 7.1 installed. You cannot update from version 7.1 to version 7.1.1 on the same computer. When a network connection exists between the computer onto which you install version 7.1.1 and the computer that contains the database for version 7.1, the installation allows you to migrate the version 7.1 database to the new computer for use with the version 7.1.1 software.

Note: The single computer installation uses a database that is for the implementation of the SoftMax Pro 7.1.1 GxP Compliance Software Suite on that computer only.

For the single computer installation:

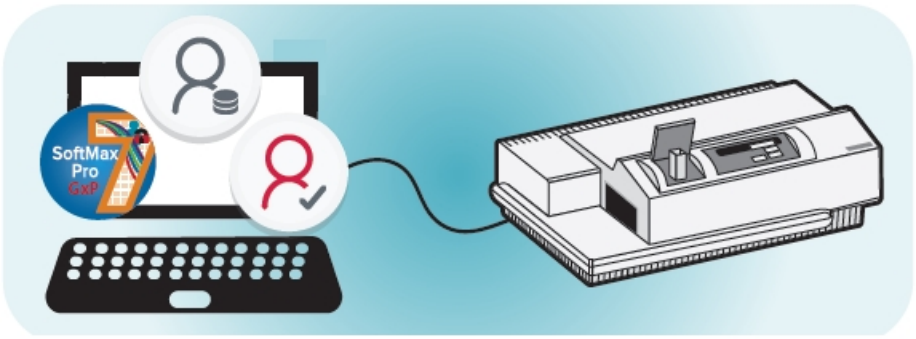
- You cannot share files in the database over a network.
- Files you export from the database will no longer have the system audit trail intact.

CAUTION! If you have multiple installations of the SoftMax Pro 7.1.1 GxP Compliance Software Suite, you cannot interchangeably use the databases from one installation to another installation and you cannot merge the databases.

Backing Up the Database

You should back up the GxP Admin Software database on a regular basis. The SoftMax Pro 7.1.1 GxP Single Computer Setup Installation Wizard allows you to install the GxP Admin Backup Tool that you can use to schedule automated, recurring backups. See Backing Up The GxP Admin Database on page 42.

Computer System Requirements



For the single computer setup, all SoftMax Pro 7.1.1 GxP Compliance Software Suite components are on one computer:

- **SoftMax Pro GxP Software**

- **GxP Admin Software** with Microsoft SQL Database

- **GxP Admin Portal Software**

For the single computer setup, you install all the SoftMax Pro 7.1.1 GxP Compliance Software Suite applications on a computer with the following specifications.

Note: You must have Admin rights on the computer.

SoftMax Pro 7.1.1 GxP Compliance Software Suite - Single Computer Setup

Item	Required
Operating system	Windows 10 Enterprise or Windows 10 Pro (all 64-bit)
Processor	Intel Core i5 processor or higher w/ 8 or more cores (min. 4 cores to install)
Memory	16 GB RAM (minimum 8 GB to install)
Hard drive	50 GB of available space (File and Folder Compression must be disabled)
Network card	Configured and enabled
Database	Microsoft SQL Express will be installed by the wizard (10 GB storage limit)
Additional software	Windows PowerShell 5.1 must be 64-bit and able to execute scripts

Note: If you intend to use Windows Credentials login mode users that use Active Directory or if you need a larger database, you can use the multi computer setup installation steps to install all SoftMax Pro 7.1.1 GxP Compliance Software Suite components on one computer. Contact Molecular Devices support for assistance.

Windows 10 Home edition and Mobile edition are not supported.

Note: The computer cannot have Microsoft SQL installed. The SoftMax Pro 7.1.1 GxP Single Computer Setup Installation Wizard installs a SQL Express database for the SoftMax Pro 7.1.1 GxP Compliance Software Suite.

Note: If the SoftMax Pro GxP Software loses connection with the GxP Admin Software database for more than 30 days, protocol data will not be saved to the database. You should resolve any database connection issue within 30 days.

Required Computer Settings

CAUTION! Disable your anti-virus program before you install the software. Anti-virus programs can interfere with the installation process. If your computer hibernates or turns off during data acquisition, the transfer of data from the instrument to the software can be interrupted.

To prevent data loss turn off all sleep and hibernation settings for the hard disk, the CPU, and the USB ports.

To define computer settings in the Windows Control Panel:

1. Open **Control Panel**.
2. Click **Hardware and Sound**.
3. Under **Power Options**, click **Change When the Computer Sleeps**.
4. Click **Change advanced power settings**.
5. In the Power Options dialog, set **Hard disk > Turn Off Hard Disk After** to **Never**.
6. Set **Sleep > Sleep After** to **Never**.
7. Set **Sleep > Hibernate After** to **Never**.
8. Set **USB Settings > USB Selective Suspend Setting** to **Disabled**.
9. Click **OK**.

Decimal Symbol Must be a Period

For the SoftMax Pro Software to parse or execute calculations, the regional options for the computer must use the period symbol (“.”) for the decimal symbol. This can be an issue if the Region and Language setting for the computer is something other than English.

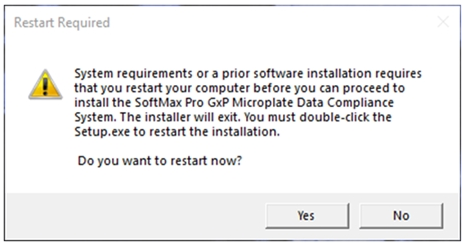
To set custom regional settings, go to **Control Panel > Clock and Region**.

Chapter 3: Installing SoftMax Pro 7.1.1 GxP Compliance Software Suite

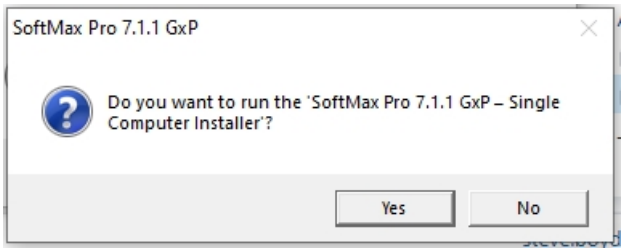
3

To install all the SoftMax Pro 7.1.1 GxP Compliance Software Suite components on a single computer.

1. Make sure the computer has all windows updates and you have performed all required reboots.
2. Close all running programs. You might need to temporarily stop anti-virus programs that do not permit software installation.
3. Insert the SoftMax Pro 7.1.1 GxP Compliance Software Suite installation DVD into the computer DVD drive or use alternative media.
4. Create a folder on the local hard drive and copy the contents of the DVD to the hard drive.
5. Locate and double-click the **SoftMax Pro 7.1.1 GxP - Single Computer Installer.exe** file to start the SoftMax Pro 7.1.1 GxP Single Computer Setup Installation Wizard.
6. When the "Do You Want to Allow This App..." message displays, click **Yes**.
7. If the Restart Required message displays (at any time during the installation):

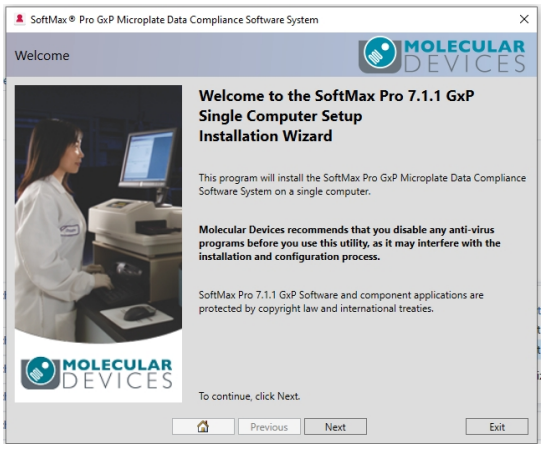


   a. Click **Yes**.
   b. Confirm that you want to restart the computer.
   c. After the computer restarts, double-click the **SoftMax Pro 7.1.1 GxP - Single Computer Installer.exe** file to restart the SoftMax Pro 7.1.1 GxP Single Computer Setup Installation Wizard.
   d. When the "Do You Want to Allow This App..." message displays, click **Yes**.
8. On the Do You Want To Run page:



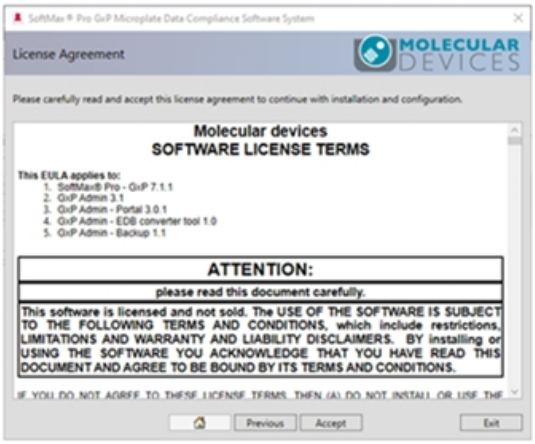
   Click **Yes** to start the installation.

9. On the Welcome page:



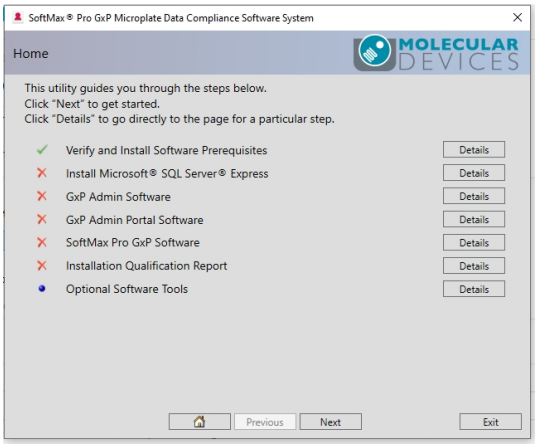
Click **Next**.

10. On the License Agreement page:



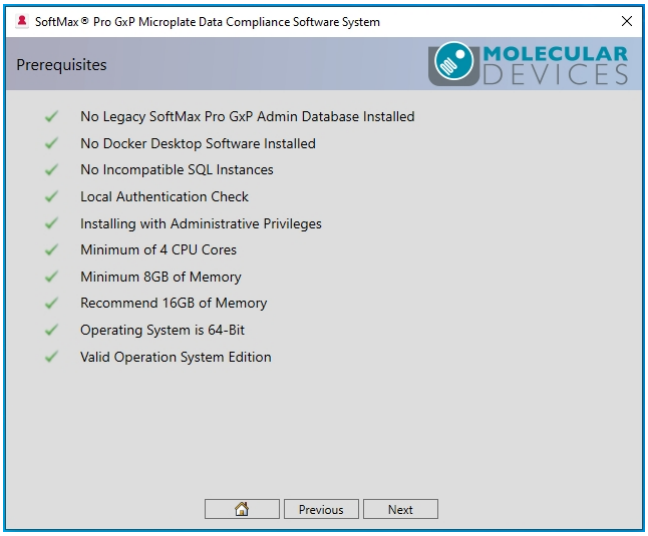
Click **Accept**.

11. On the Home page:



Click **Next** or click **Details** next to **Verify and Install Software Prerequisites**.

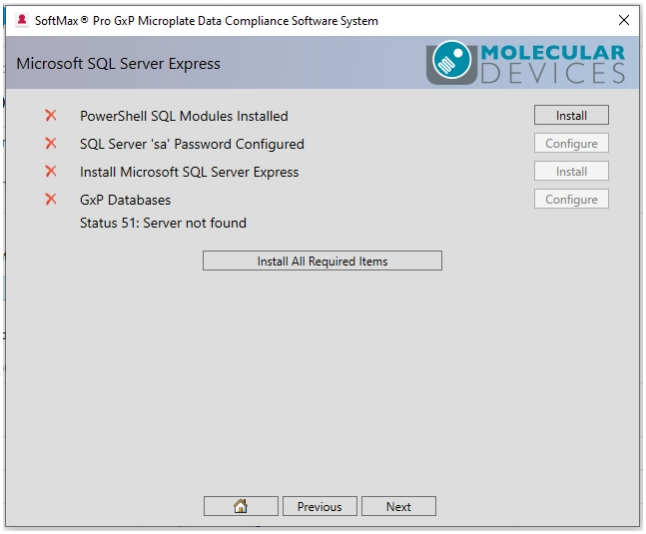
12. On the Prerequisites page:



Note: If any option displays an X, you cannot proceed with the installation on this computer because the computer system requirements have not been met. See Computer System Requirements on page 7.

Click **Next**.

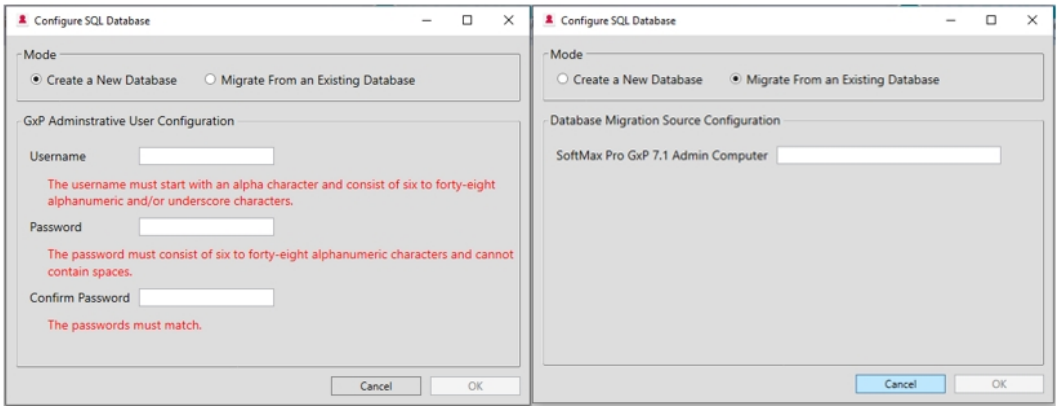
13. On the Microsoft SQL Server Express page:



Note: You can click the button next to each item to install or you can click Install All Required Items to expedite the installation.

Click **Install All Required** Items. This takes approximately five minutes on a computer that meets the listed specifications.

14. On the Configure SQL Database dialog:



a. Select a **Mode** option:

- Select **Create a New Database** if you did not install the SoftMax Pro GxP Software version 7.1 or do not want to migrate the GxP Admin version 3.0 database.
  - In the **Username** field, enter the name of the first user to use the software. This user has the GxP Admin Access permission and the System Audit Trail Access permission. This user is also known as the Administrator user.

    Note: Username must start with an alpha character, be at least 6 alphanumeric and/or underscore characters (no other special characters and no spaces). You can change this username in the software.

  - In the **Password** field, enter the user's temporary password.

    Note: Password must be at least six alphanumeric characters (no special characters and no spaces). The software forces you to change this password upon first login.

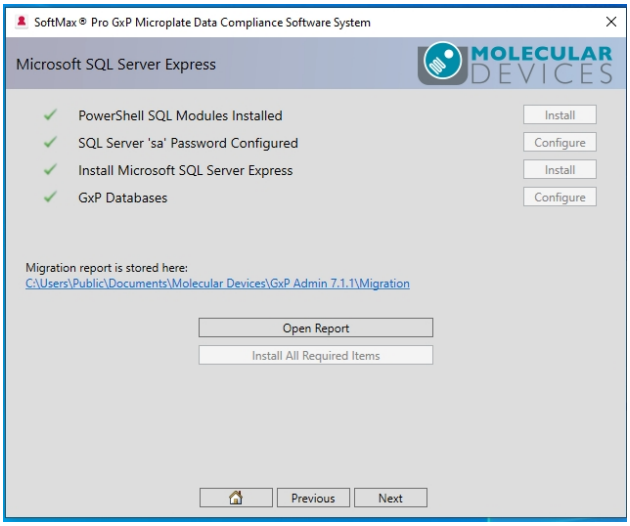
  - In the **Confirm Password** field, re-enter the password.

    CAUTION! If you forget this username and password you must reinstall the software.

- Select **Migrate From an Existing Database** if you installed the SoftMax Pro 7.1.1 GxP Compliance Software Suite with the SoftMax Pro GxP Software version 7.1 and you want to migrate the GxP Admin Software version 3.0 database.
  - In the **SoftMax Pro GxP 7.1 Admin Computer** field, enter the valid computer name or IP address of the computer onto which you installed the GxP Admin Software version 3.0 database.
  - Click **Verify Source Database Connection** to confirm that the two computers can communicate. A √ must display before you can proceed. Docker Desktop must be running on the source computer.

b. Click **OK**.

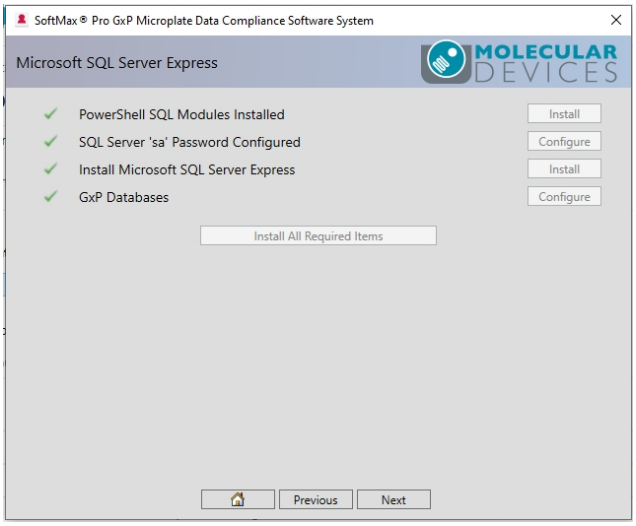
Note: If you migrate from an existing database this generates a migration report in: C:\Users\Public\Documents\Molecular Devices\GxP Admin 7.1.1\Migration



Click **Open Report** to view the report. See Migration Report on page 17.

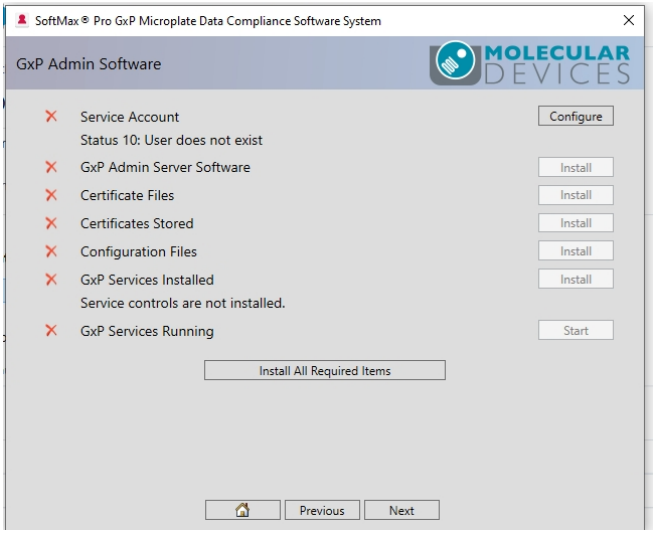
CAUTION! If you migrate, you use the GxP Admin Software version 3.0 (SoftMax Pro GxP Software version 7.1) Administrator username and password when you login for the first time. If you forget this username and password you must reinstall the software.

15. On the Microsoft SQL Server Express page:



Click **Next**.

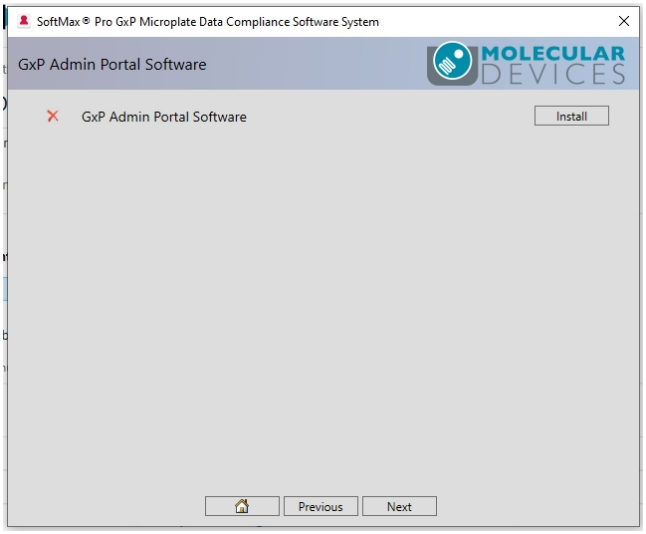
16. On the GxP Admin Software page:



Note: You can click the button next to each item to install or you can click Install All Required Items to expedite the installation.

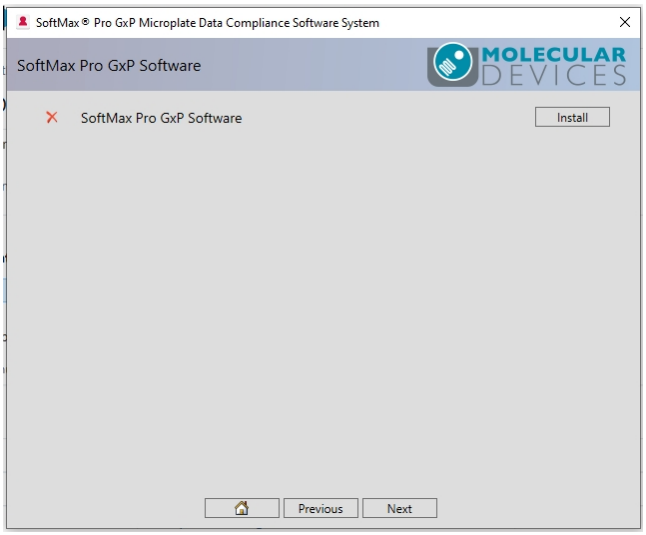
a. Click **Install All Required** Items.
b. Click **Next**.

17. On the GxP Admin Portal Software page:



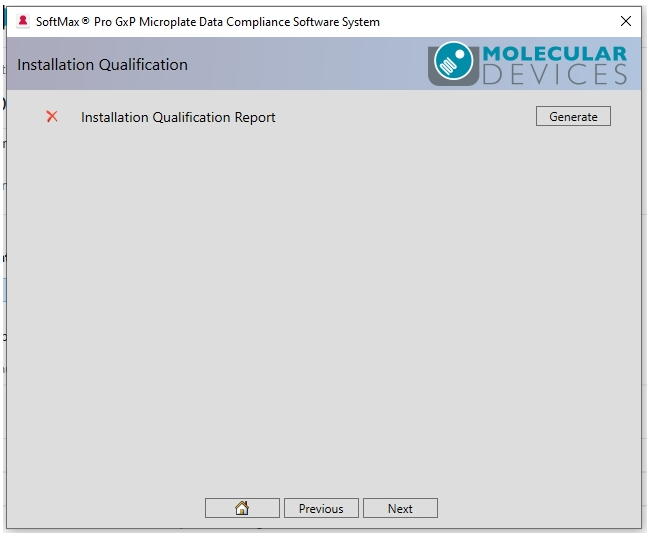
a. Click **Install**.
b. Click **Next**.

18. On the SoftMax Pro GxP Software page:



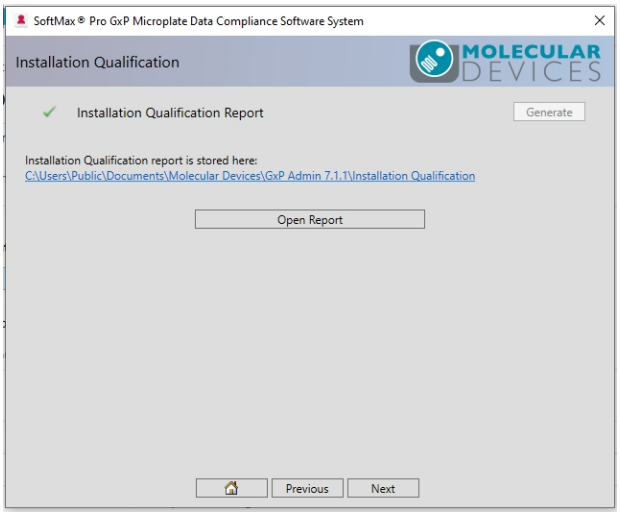
    a. Click **Install**. This takes approximately four and a half minutes on a computer that meets the listed specifications.
    b. Click **Next**.

19. On the Installation Qualification page:



Click **Generate** to generate a qualification report that validates the success of the installation.

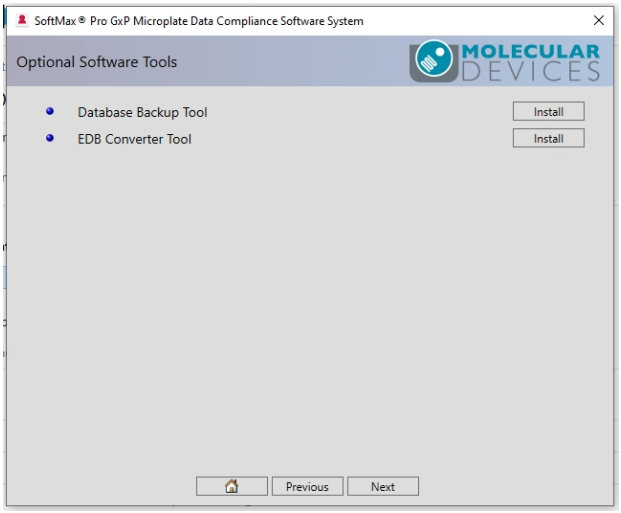
20. On the Installation Qualification page:



    a. Click **Open Report** to view the qualification report. See Qualification Report on page 17.

    b. Click **Next**.

21. On the Optional Software Tools page:

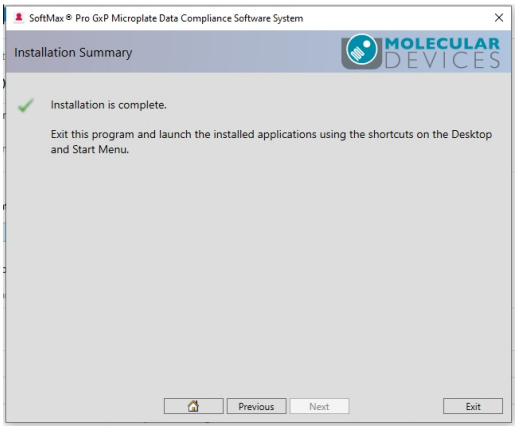


    a. Next to **Database Backup Tool**, click **Install** if this computer does not automatically backup the SoftMax Pro 7.1.1 GxP Compliance Software Suite database and you want to use the GxP Admin Backup Tool. See Backing Up The GxP Admin Database on page 42.

    b. Next to **EDB Converter Tool**, click **Install** if you have users that were created in version 2.x of the SoftMax Pro 7.1.1 GxP Compliance Software Suite and you want to import them into the version 3.x database. See Converting Legacy Users on page 28.

    c. Click **Next**.

22. On the Installation Summary page:



Click **Exit**.

The computer desktop contains the following icons:

- GxP Admin Portal Software

- SoftMax Pro GxP Software

- GxP Admin Backup Tool (if you installed this)

StakMax Microplate Handling System Plug-in

If you use the StakMax® Microplate Handling System, you must install the SoftMax Pro Software 7.1.1 StakMax Plug-in on each computer that uses the SoftMax Pro GxP Software to operate the StakMax instrument. See the *SoftMax Pro 7.1.1 StakMax Plug-in Installation Guide* located on the SoftMax Pro 7.1.1 GxP Compliance Software Suite installation DVD.

Qualification Report

The SoftMax Pro 7.1.1 GxP Single Computer Setup Installation Wizard creates a qualification report for your records in the following location:

C:\Users\Public\Documents\Molecular Devices\GxP Admin 7.1.1\Installation Qualification\GxP Single Computer Report.pdf

This report lists the system information, date, user, and a file summary that lists all files that were installed with the word "Yes" if it exists as intended.

Migration Report

If you migrate the SoftMax Pro 7.1.1 GxP Compliance Software Suite version 3.0 database during the installation, the SoftMax Pro 7.1.1 GxP Single Computer Setup Installation Wizard creates a migration report for your records in the following location:

C:\Users\Public\Documents\Molecular Devices\GxP Admin 7.1.1\Migration\migration-report.pdf

This report lists the information that was migrated including the names of the documents.

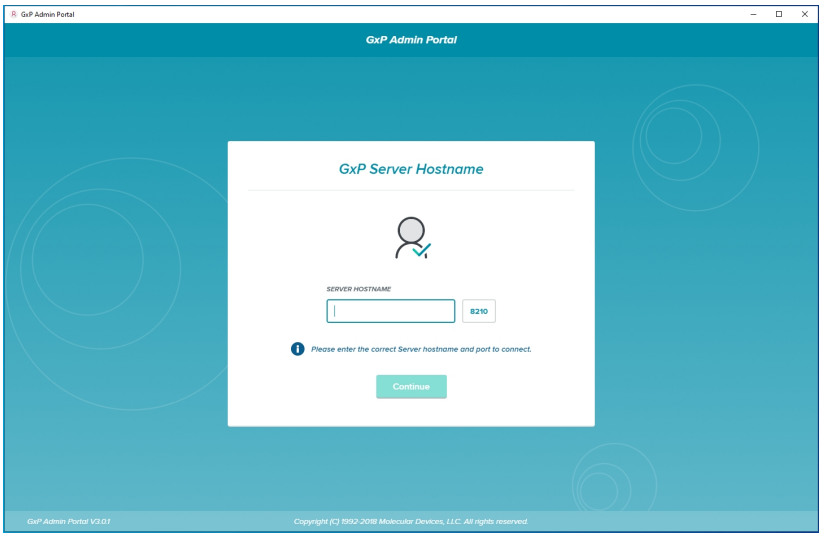
Chapter 4: Getting Started - GxP Admin Portal Software

4

The GxP Admin Portal is the user interface for the GxP Admin Software. Before you can use the SoftMax Pro GxP Software, you use the GxP Admin Portal to add the licenses for the SoftMax Pro users, create the users, manage Roles, and create Projects.

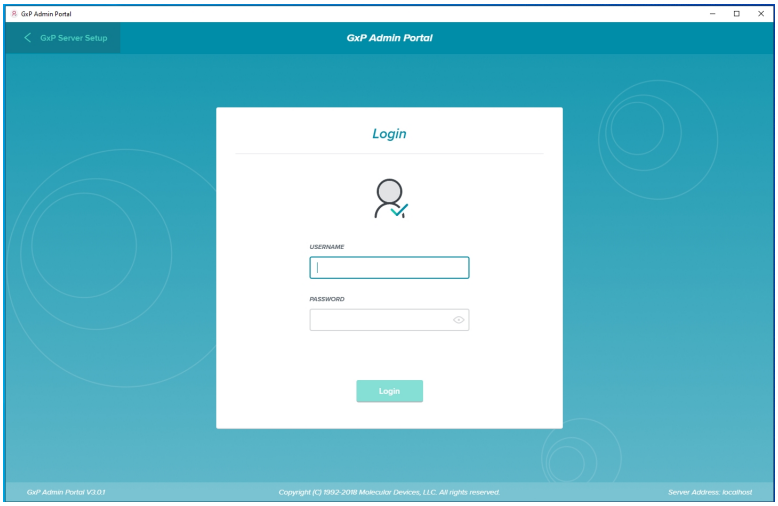
To get started in the GxP Admin Portal:

1. On the computer desktop, double-click to start the GxP Admin Portal Software.
2. In the GxP Admin Portal GxP Server Hostname dialog:



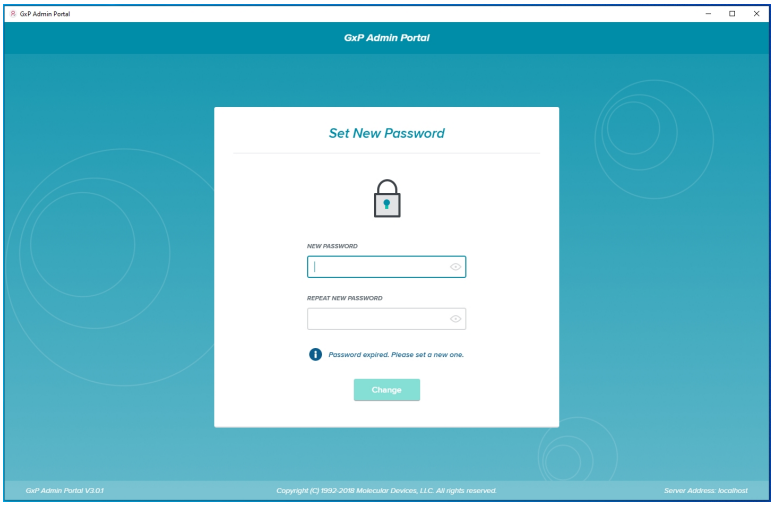
   a. In the **Server Hostname** field, enter **localhost**.
   b. Click **Continue**.

3. In the GxP Admin Portal Login dialog:



   a. In the **Username** field, enter the user name you entered when you installed the SoftMax Pro 7.1.1 GxP Compliance Software Suite (a.k.a. Administrator user).
   b. In the **Password** field, enter the password you entered when you installed the SoftMax Pro 7.1.1 GxP Compliance Software Suite.
   c. Click **Login**.

4. In the Set New Password dialog:

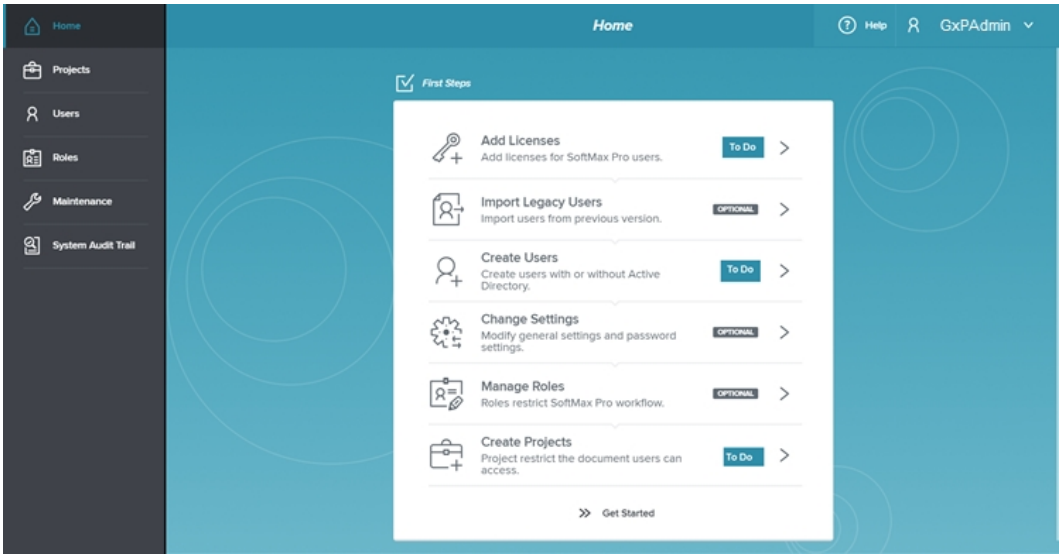


   a. In the **New Password** field, enter the new password for the Administrator user. The password must be at least 10 characters long, contain at least one number, at least one lowercase letter, at least one uppercase letter, and at least one special character.
   b. In the **Repeat New Password** field, enter the password a second time.

> **Note:** If you forget this password, you must reinstall the software.

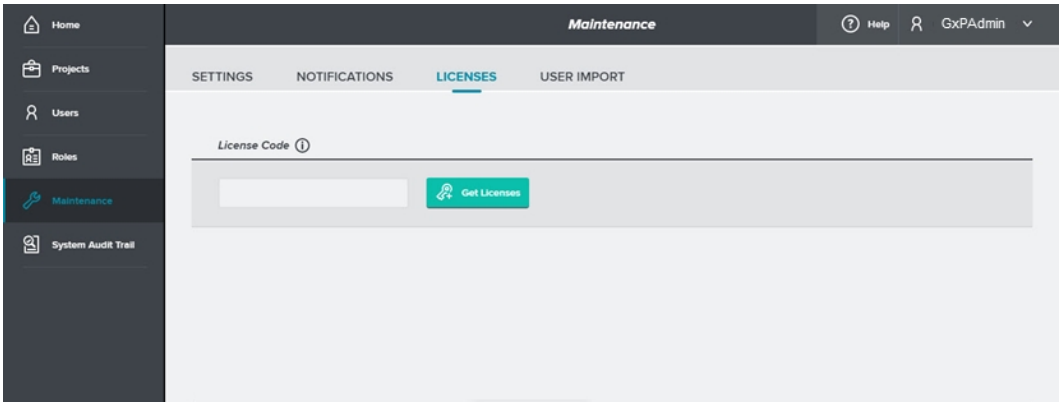
   c. Click **Change**.

5. On the Home page:



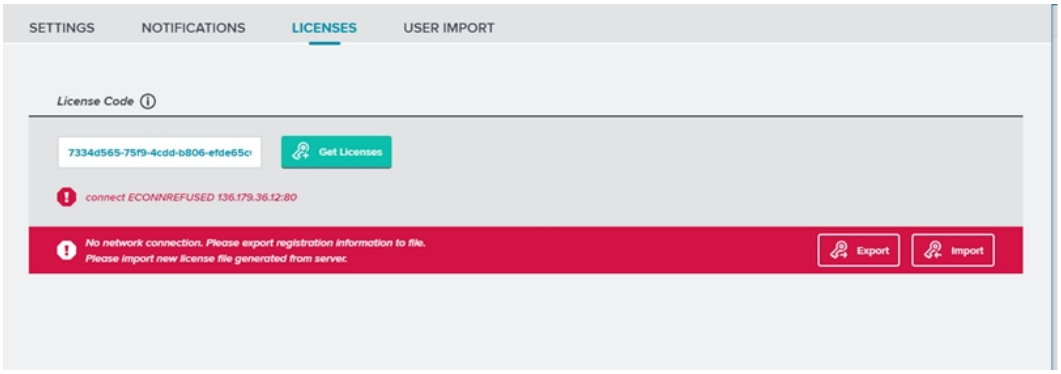
Click **Add Licenses**.

6. On the Licenses tab on the Maintenance page:



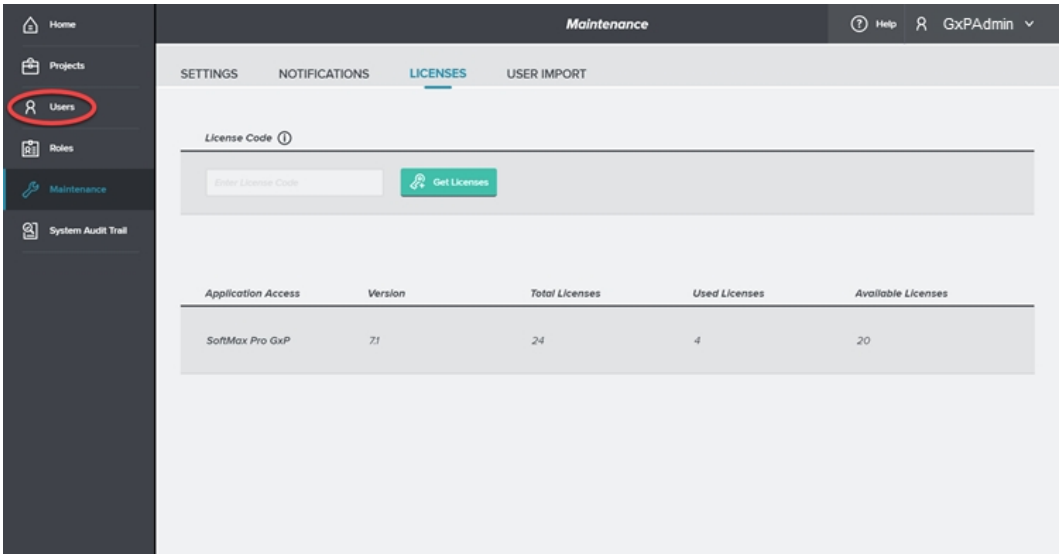
   a. In the **License Code** field, enter the license code. This code is printed on the SoftMax Pro GxP Certificate of License shipped with the installation DVD.
   b. Click **Get License**. If the computer is connected to the Internet, the code should be validated, and the license information displays on the page. Skip the next step.
   If the computer is not connected to the Internet, continue to the next step.

7. On the Licenses tab on the Maintenance page when the computer is not connected to the Internet:

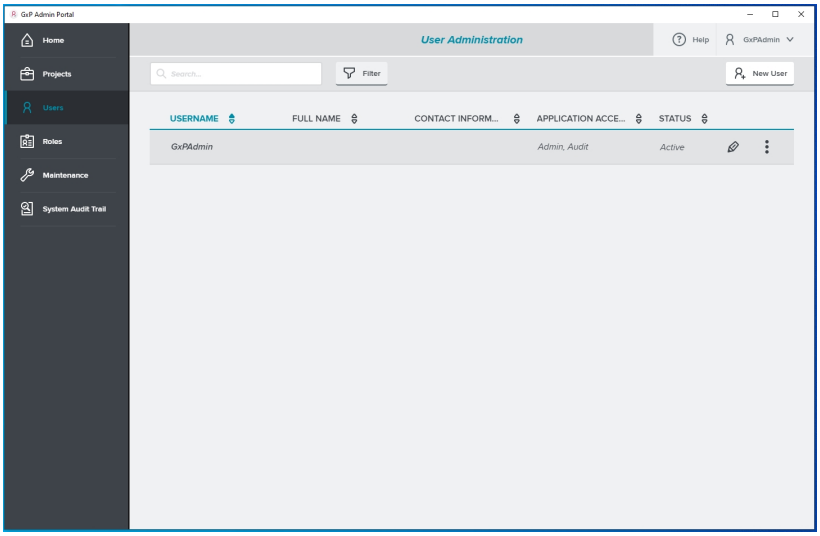


   a. Click **Export**.
   b. Save the **OfflineClaim.json** file to a flash drive or to a location that has access to the Internet.
   c. Contact Molecular Devices Technical Support to complete the Offline Activation process. Technical Support will send back a license activation ***.json** file. See Obtaining Support on page 45
   d. Save the license activation ***.json** file to a flash drive and insert the flash drive into the computer running the GxP Admin Portal Software.
   e. Click **Import** to import the license activation ***.json** file into the GxP Admin Portal.

8. On the left, click **Users**.

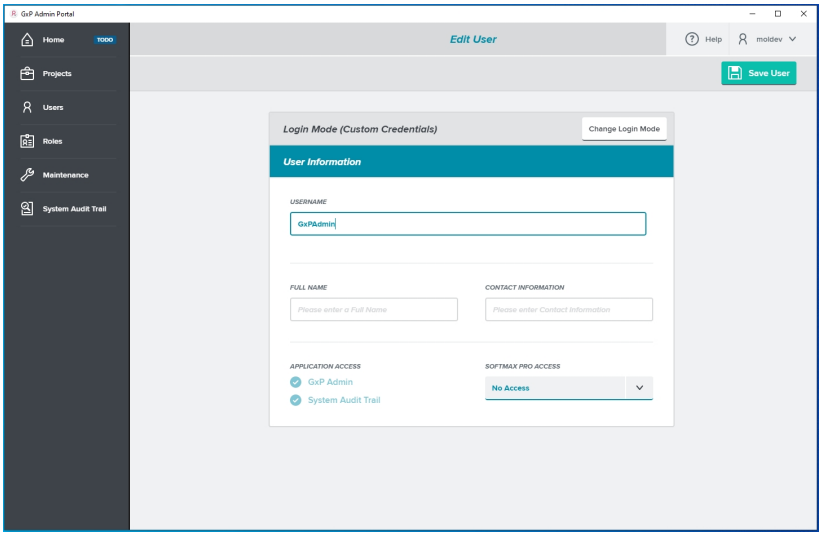


9. On the User Administration page:



Next to the first user, click .

10. In the Edit User dialog:

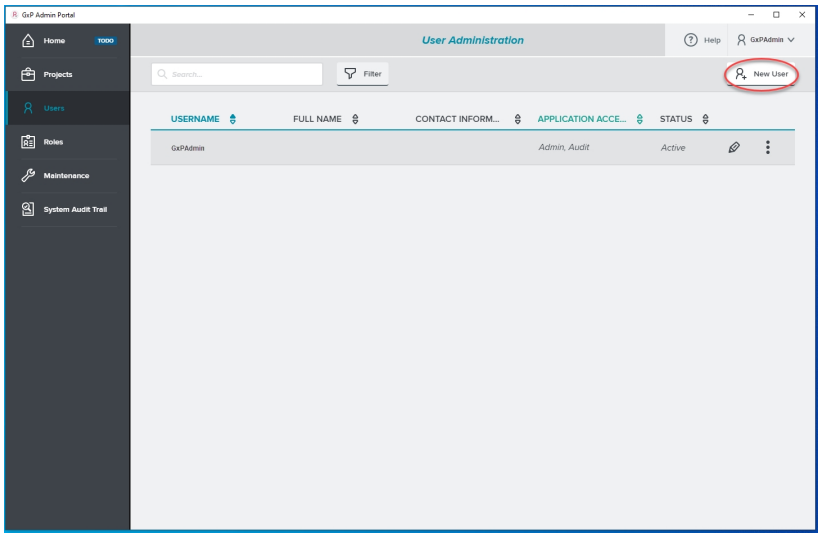


a. In the **Full Name** field, enter the user's full name.
b. In the **Contact Information** field, enter the user's contact information.
c. For this user, the software selects and disables both **Application Access** check boxes. In general, you would leave the **SoftMax Pro Access** field set to **No Access** for this user because this is the user that you use to manage the other users and do not use in the SoftMax Pro GxP Software.
d. Click **Save User**.

11. If you update from GxP Admin Software version 2.x to GxP Admin Software version 3.x, you can use the GxP Admin EDB Converter Tool to convert the version 2.x .edb user files to the version 3.x edbexp file format. See Converting Legacy Users on page 28.

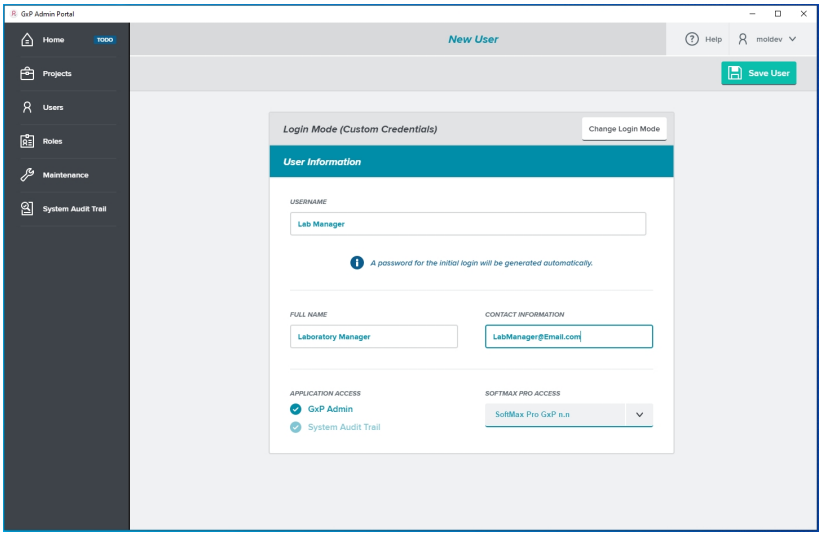
    After you convert the user files to the .edbexp format, use the GxP Admin Portal to import usernames, passwords, and the GxP Admin Access permission into the version 3.x database. After you import the users you need to use the GxP Admin Portal to assign each user with the SoftMax Pro Access permission a license from the User Administration page and assign each user to a Project from the Project Administration page before the user can log in to the SoftMax Pro GxP Software. See Importing Legacy Users on page 31.

12. To add new users, on the User Administration page:



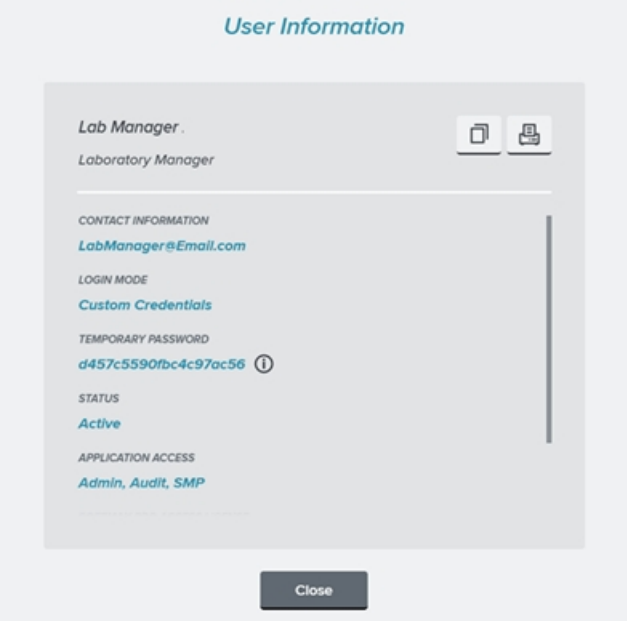
    Click **New User**.

13. To create users with the **Custom Credentials Login Mode** whose credentials are managed by the SoftMax Pro 7.1.1 GxP Compliance Software Suite, do the following: (The single computer setup does not support the Windows Credentials Login Mode.)



a. In the **Username** field, enter the user's name.
b. In the **Full Name** field, enter the user's full name.
c. In the **Contact Information** field, enter the user's contact information.
d. To grant the user access to the GxP Admin Software via the GxP Admin Portal, select the **GxP Admin** check box. This also grants access to the System Audit Trail.
e. To grant the user access to only the System Audit Trail, clear the GxP Admin check box and select the **System Audit Trail** check box.
f. To grant the user access to the SoftMax Pro GxP Software, click the **SoftMax Pro Access** drop-down and select **SoftMax Pro GxP 7.n.n**

g. Click **Save User**. The User Information dialog contains the temporary password the user needs the first time they log in to the system:

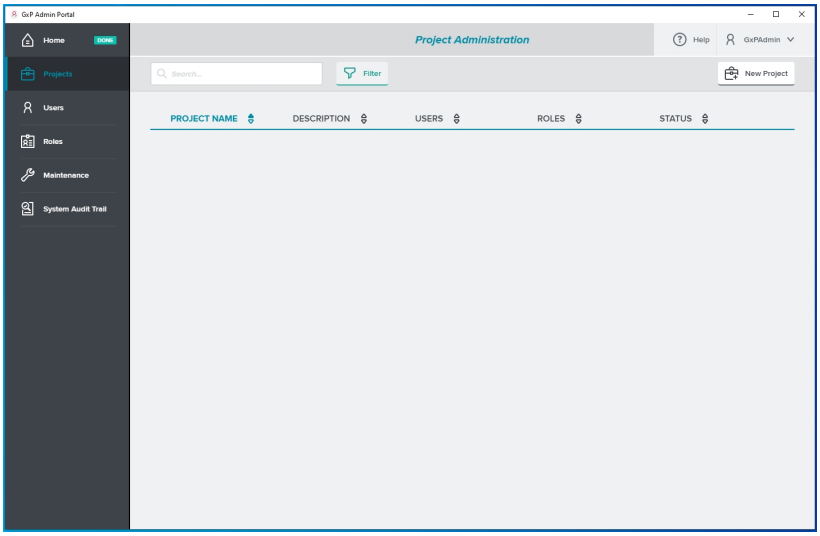


h. Click to copy the user information to the computer clipboard.

i. Either paste the user information into an email that you send to the user or open a word processing application and paste this information into a document that the user can access when they log in to the system.

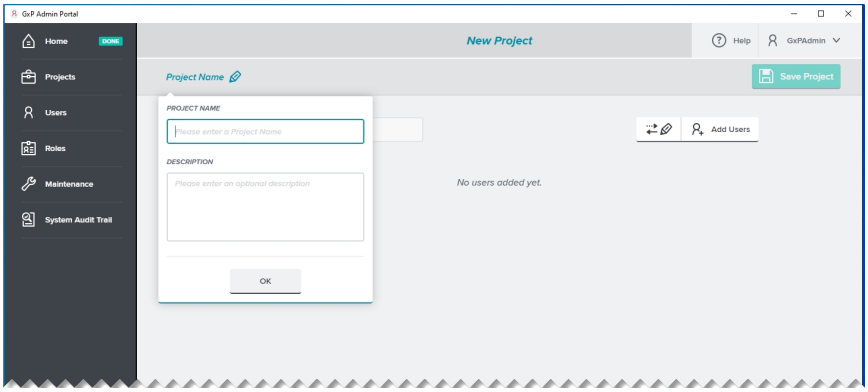
j. Click **Close**.

14. On the left, click **Projects**.
15. On the Project Administration page:



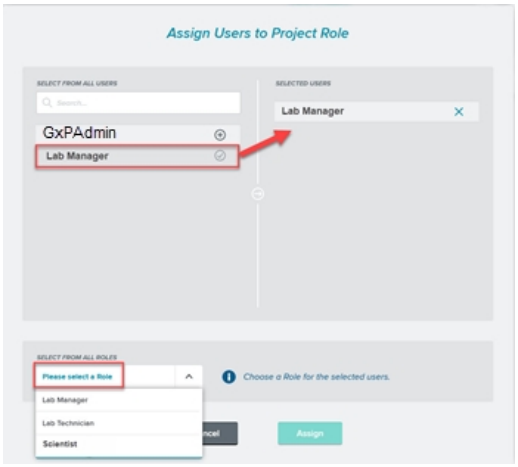
Click **New Project**.

16. In the New Project dialog:



a. In the **Project Name** field, enter the project name.
b. In the **Description** field, enter a description if you want.
c. Click **OK**.
d. Click **Add Users**.

17. In the Assign Users to Project Role dialog:

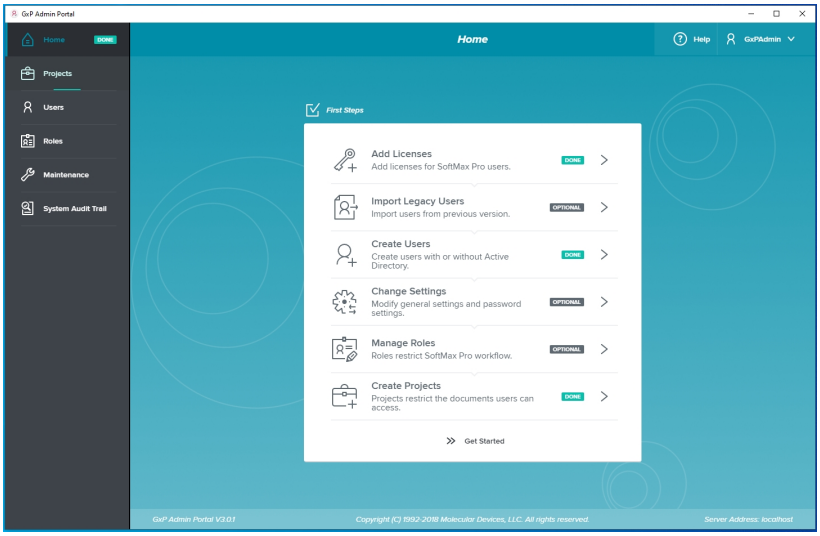


a. Click ⊕ next to each user to add to the Project with the permissions you will grant in the next step.
b. Click the **Select From All Roles** drop-down and select the Role that contains the permissions to grant to the users. You can select from the three default Roles that the installation creates or use the Role Administration page to manage Roles. See the *GxP Admin Software User Guide* or the application help.
c. Click **Assign**.
d. Repeat to add additional users with different Roles to the Project.

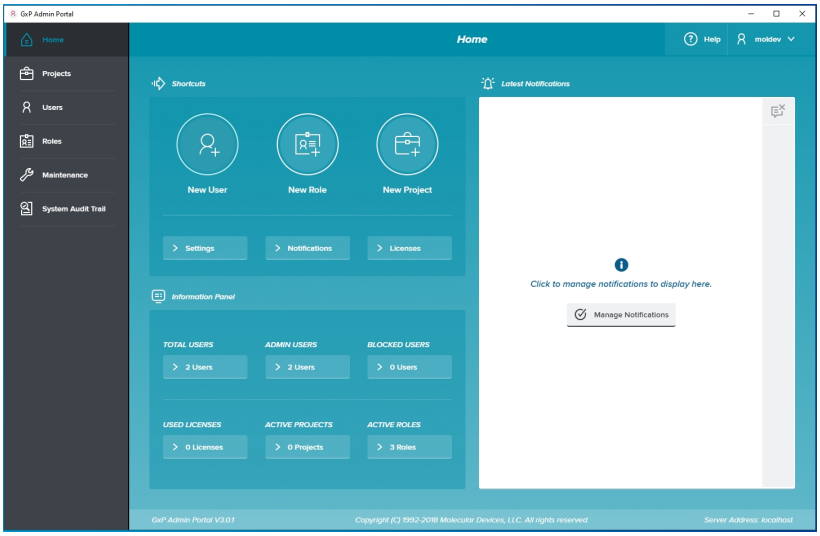
Note: You can assign a user to multiple Projects. Each user can have only one Role in each Project.

18. In the New Project dialog, click **Save Project**.

19. On the left, click **Home**.
20. On the Home page:



At the Bottom of the To Do list, click **Get Started** to display the Home page with shortcuts to relevant workflows, notifications, and other information.



21. Use the Settings tab on the Maintenance page to manage password strength requirements. See the *GxP Admin Software User Guide* or the application help.

Converting Legacy Users

The GxP Admin Software version 3.x is significantly different from the previous versions. The database structure is different and additional security permissions have been implemented. Therefore, if you want to use the users from GxP Admin Software version 2.x, you must convert legacy user files to an updated format and then import the legacy users into the GxP Admin Software version 3.x database.

The GxP Admin EDB Converter Tool is a separate software application that converts the version 2.x user files that have an .edb file extension to the version 3.x user files that have an .edbexp file extension.

Note: After you convert the user files, you use the GxP Admin Portal to import usernames, passwords, and the GxP Admin Access permission into the GxP Admin Software version 3.x database. You must then assign each user with the SoftMax Pro Access permission a license from the User Administration page and to a Project from the Project Administration page.

The SoftMax Pro 7.1.1 GxP Single Computer Setup Installation Wizard installs the GxP Admin EDB Converter Tool in the following path:

C:\Program Files (x86)\Molecular Devices\GxP EDB Converter

To prepare to convert GxP Admin Software version 2.x user files that have the .edb file extension:

- You can run the GxP Admin EDB Converter Tool on the computer on which you install the SoftMax Pro 7.1.1 GxP Compliance Software Suite if the computer has a network connection to the computers that contain the .edb files.
- You can use a flash drive to copy the .edb files to any location on the computer on which you install the SoftMax Pro 7.1.1 GxP Compliance Software Suite.
- You can use a flash drive to move the GxP EDB Converter folder to the computer on which the .edb files are located.
- You can install the GxP Admin EDB Converter Tool on other computers.

Install the GxP Admin EDB Converter Tool

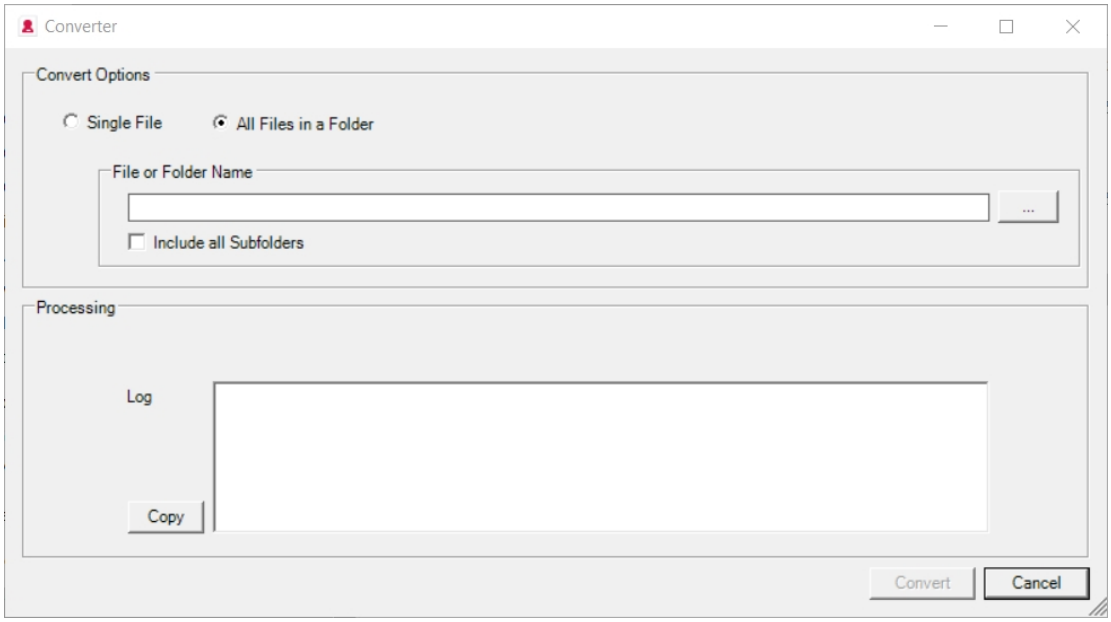
To install the GxP Admin EDB Converter Tool:

1. Insert the GxP Admin Software DVD in the computer DVD drive or use alternative media. Locate and double-click EDBConverter<n.n>Setup.exe file to start the install.
2. On the Welcome page, click **Next**.
3. On the License Agreement page:
   a. Select the **I Accept the Agreement** check box.
   b. Click **Next**.
4. On the Destination Folder page and the pages that follow, click **Next** to accept the default settings or you can read the instructions and do a custom installation until the Installation Complete page displays.
5. On the Installation Complete page, click **Finish**.

The GxP Admin EDB Converter Tool icon appears on the computer desktop.

Converting Legacy User Files

The GxP Admin EDB Converter Tool is a separate software application that you run on a computer that has access to your legacy GxP Admin Software user files. The GxP Admin Software version 2.x user files have an .edb file extension and the GxP Admin Software version 3.x user files have an .edbexp file extension.



Converting a Single File

To convert one .edb file to an .edbexp file:

1. Click or locate and double-click **ConverterTool.exe** to display the Converter dialog.
2. Select the **Single File** Convert Option.
3. To the right of the File or Folder Name field, click to display the Open dialog.
4. Navigate to the .edb file and click **Open** to display the path to the file in the File or Folder Name field. Note this location because the software places the new .edbexp file here.
5. Click **Convert**. The Log field displays the progress of the conversion.
6. The software places the .edbexp file in the same folder as the .edb file. Copy the .edbexp file to a flash drive or place it on a network drive that is accessible to the computer running the GxP Admin Portal Software. See Importing Legacy Users on page 31.

Converting Multiple Files

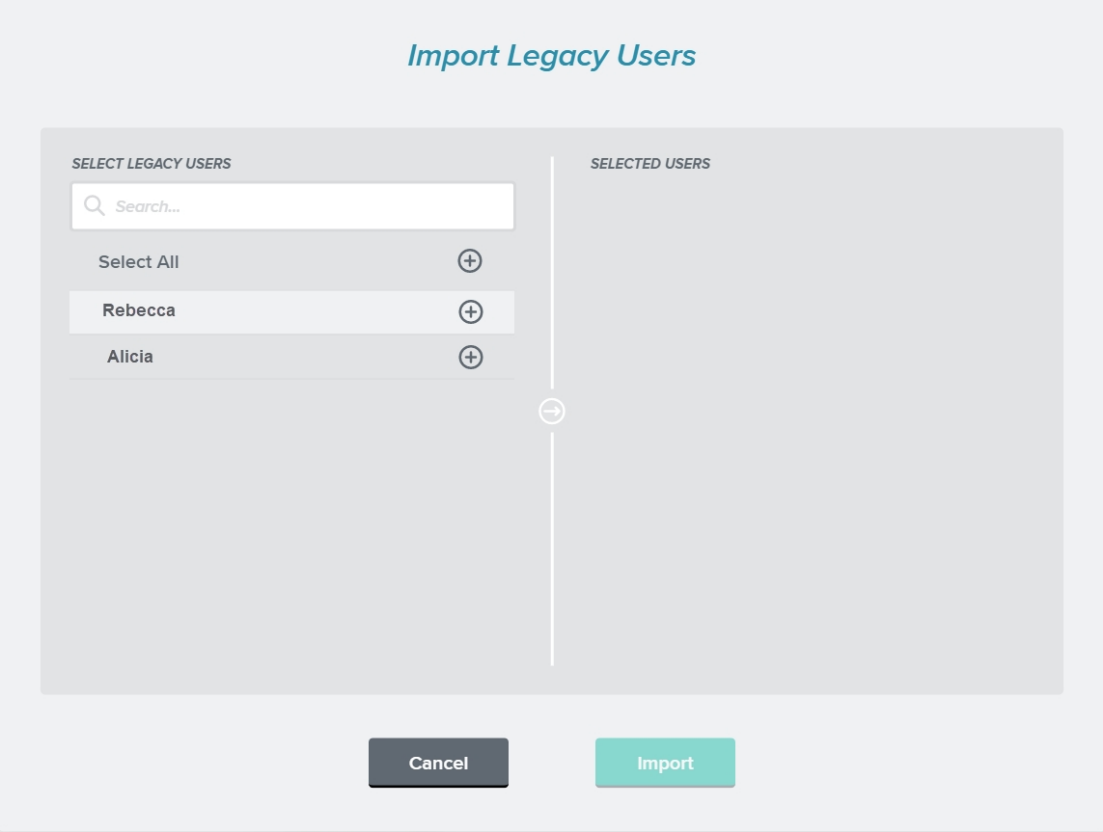
To convert multiple .edb files to .edbexp files:

1. Click or locate and double-click **ConverterTool.exe** to display the Converter dialog.
2. Select the **All Files In a Folder** Convert Option.
3. To the right of the File or Folder name field, click to display the Browse For Folder dialog.
4. Navigate to the folder that contains the .edb files and click **OK** to display the path to the folder in the File or Folder Name field.
5. Select the **Include All Subfolders** check box to convert all .edb files in the subfolders of the folder you select.
6. Click **Convert**. The Log field displays the progress of the conversion. The EDB Converter Tool creates an .edbexp file for each .edb file in the same location as the .edb file.
7. Copy the .edbexp files to a flash drive or place them on a network drive that is accessible to the computer running the GxP Admin Portal Software. See Importing Legacy Users on page 31.

Importing Legacy Users

Use the Import Legacy Users dialog to select the individual user names to import into the GxP Admin Software version 3.x database.

After you complete the import, you must use the User Administration page to assign each user who is to have access to the SoftMax Pro GxP Software a license and then assign each user to at least one Project.



To import users:

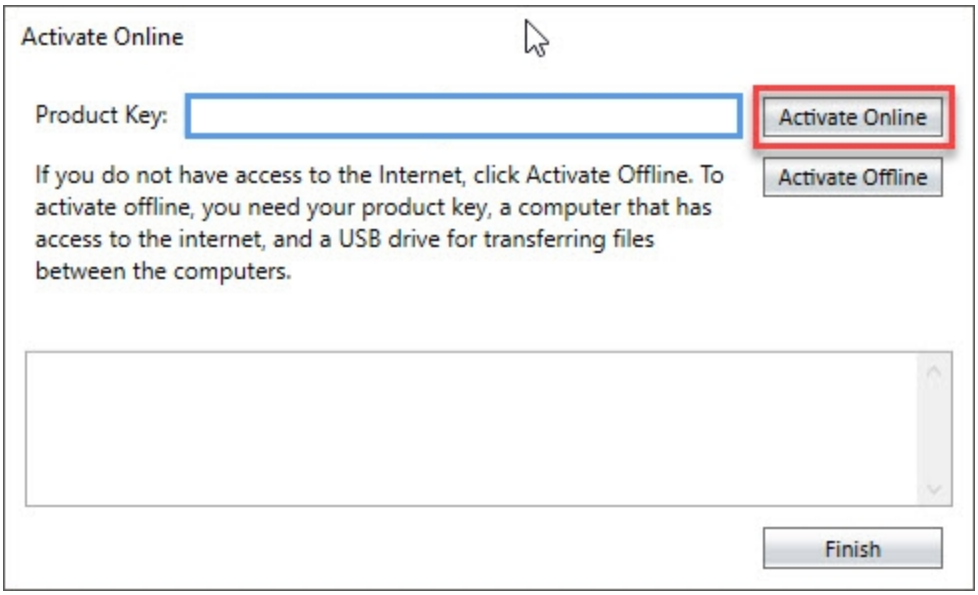
1. Use the GxP Admin EDB Converter Tool to convert legacy .edb files to .edbexp files and save the .edbexp files to a location from where the GxP Admin Portal can access the files. See Converting Legacy Users on page 28.
2. On the left, click **Maintenance** to display the Maintenance page.
3. Select the **User Import** tab.
4. Click **Import**.
5. Navigate to the .edbexp file.
6. Click **Open**.

Chapter 5: Getting Started - SoftMax Pro GxP Software

5

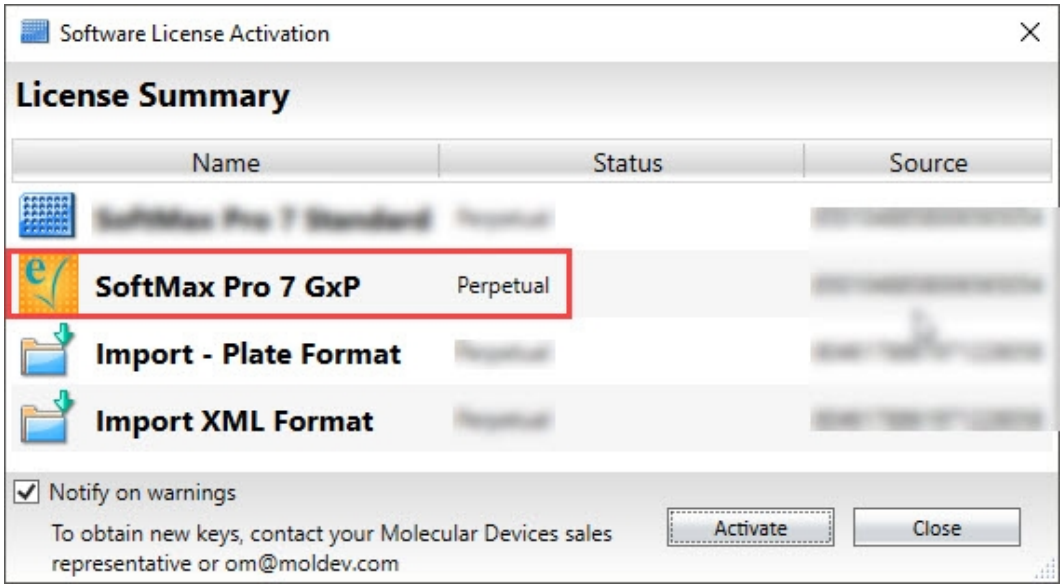
The SoftMax Pro GxP Software is the software that controls the microplate reader and does data analysis. After you use the GxP Admin Portal Software to create users and Projects, you can start using the SoftMax Pro GxP Software.

1. On the computer desktop, double-click to start the SoftMax Pro Software.
2. On the Software License Activation page, click **Activate**.
3. In the Activate Online dialog:



   a. In the **Product Key** field, enter the product key.
   b. If the computer has access to the Internet, click **Activate Online**.
      If the computer does not have access to the Internet, see Activating SoftMax Pro GxP Offline on page 36.
   c. Wait for the *Activation Success* message and click **Finish**.

4. In the License Summary dialog:

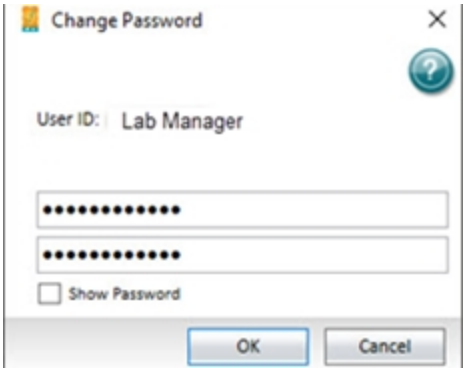


Note that SoftMax Pro 7 GxP has a perpetual license.

5. On the SoftMax Pro GxP Log On dialog:

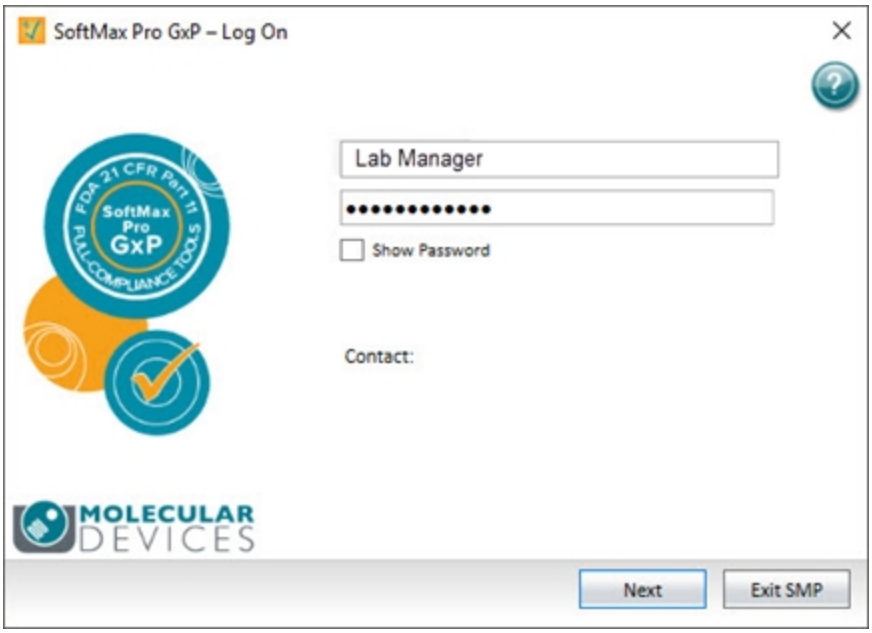
   a. In the **User ID** field, enter the name of the user you created in the GxP Admin Portal Software to whom you assigned a SoftMax Pro license.
   b. For a Custom Credentials login mode user, open the email or word processing application file that contains the password that the GxP Admin Portal Software generated. Copy and paste the password in the **Password** field.
      For a Windows Credential login mode user, enter the user's Active Directory password in the **Password** field.
   c. Click **Next**.

6. For a Custom Credentials login mode user, the Change Password dialog displays:



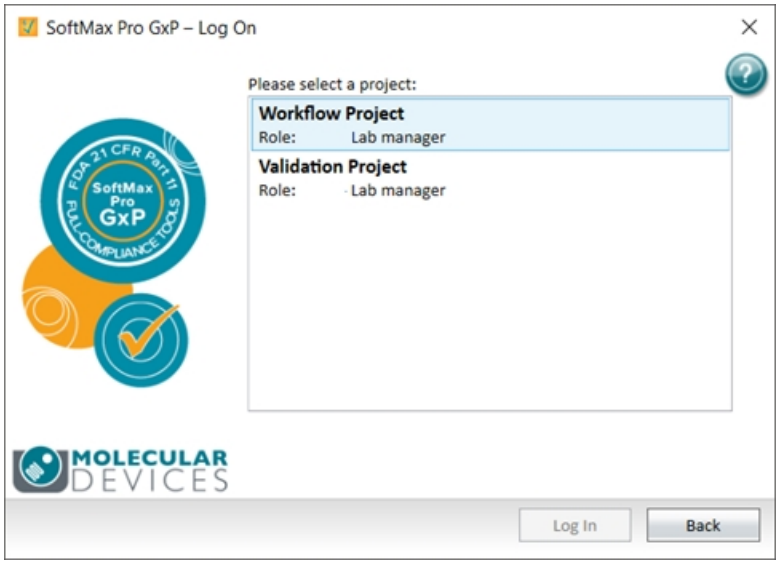
   a. In the **New Password** field, enter a new password. Default password strength settings require that the password must be at least 10 characters long, contain at least one number, at least one lowercase letter, at least one uppercase letter, and at least one special character.
   b. In the **Confirm Password** field, re-enter the password.
   c. Click **OK**.
   d. Click **OK** on the confirmation message.

7. In the SoftMax Pro GxP Log On dialog:



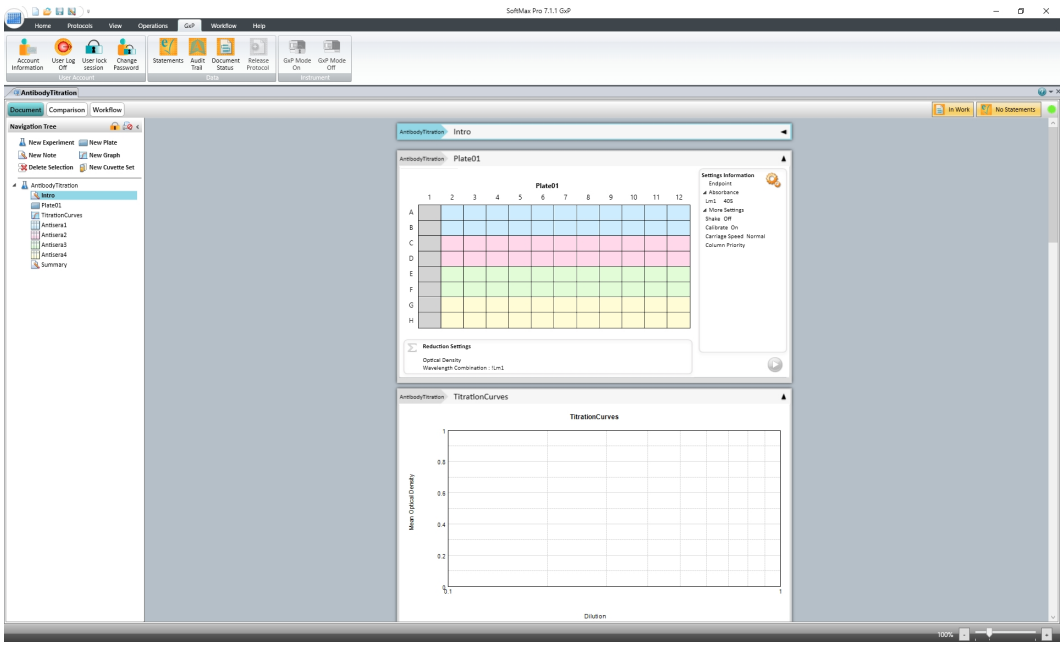
   a. In the **Password** field, enter the new password.
   b. Click **Next**.

8. In the Select Project dialog:



   a. Select a Project to which you associated the user. A user can be a member of multiple Projects.
   b. Click **Log In**.

9. In the SoftMax Pro GxP Software:



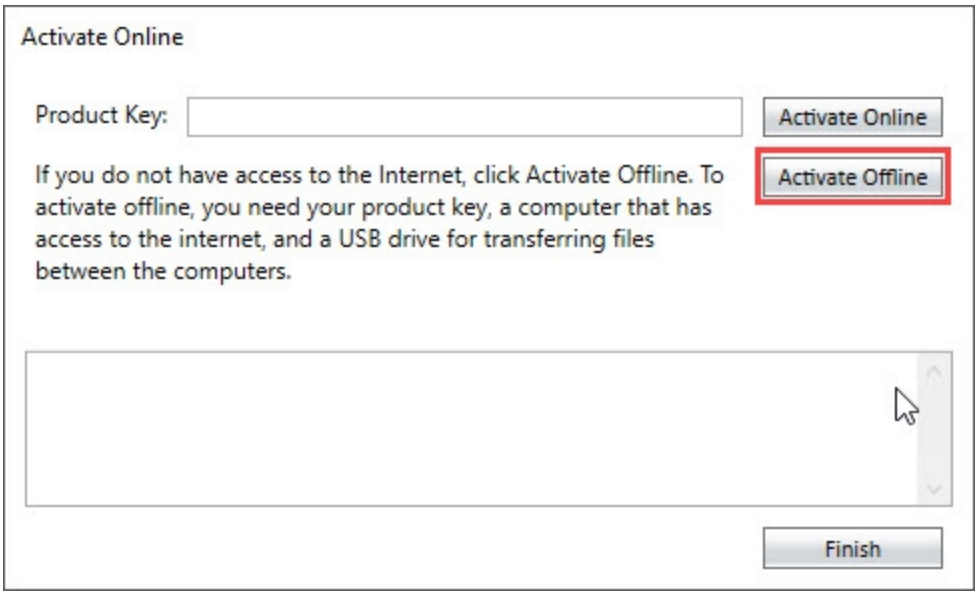
Begin using the software. See the *SoftMax Pro Data Acquisition and Analysis Software User Guide*.

Activating SoftMax Pro GxP Offline

When the computer onto which you install the SoftMax Pro GxP Software cannot connect to the Internet, you need a flash drive and access to a computer that is connected to the Internet.

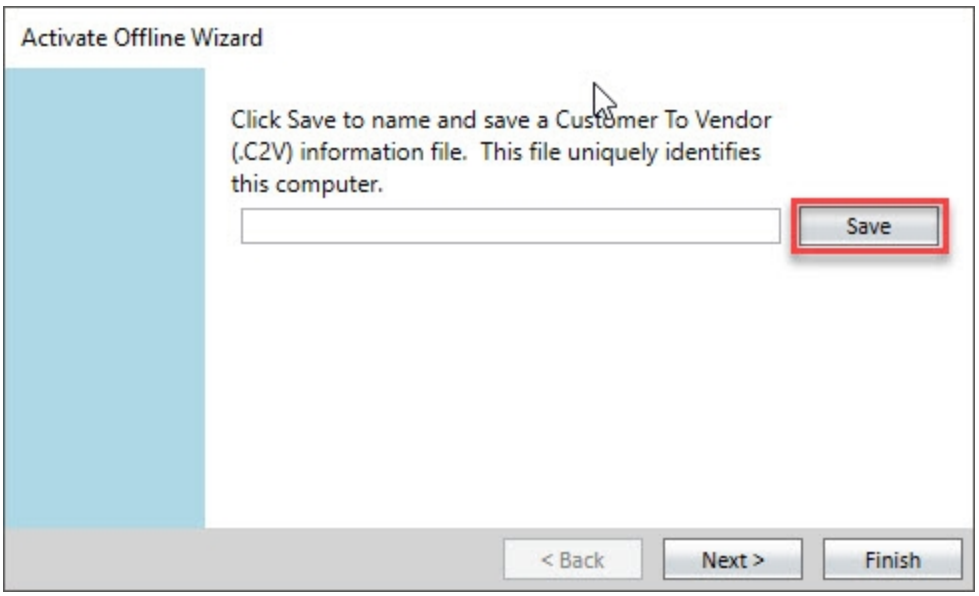
To license the SoftMax Pro GxP Software on a computer that cannot connect to the Internet:

1. In the Activate Online dialog:



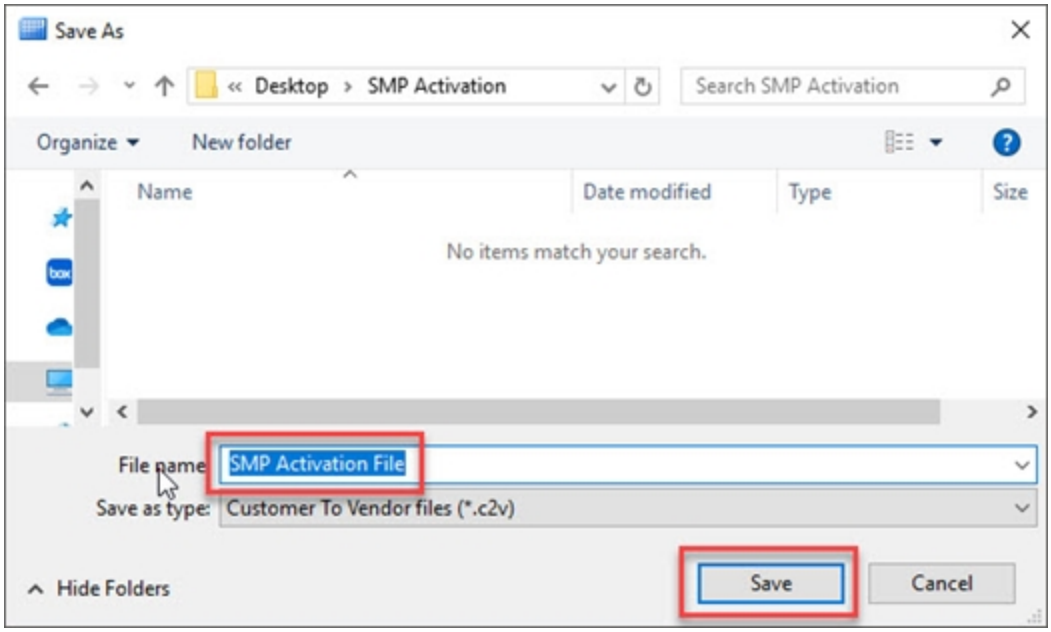
   Click **Activate Offline**.

2. In the Activate Offline Wizard dialog:



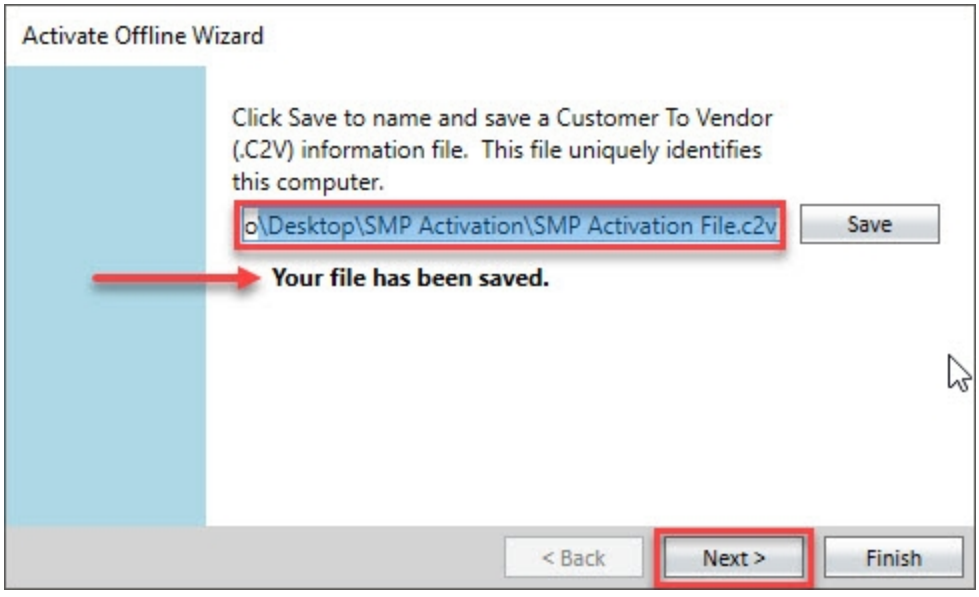
   Click **Save**.

3. In the Save As dialog:



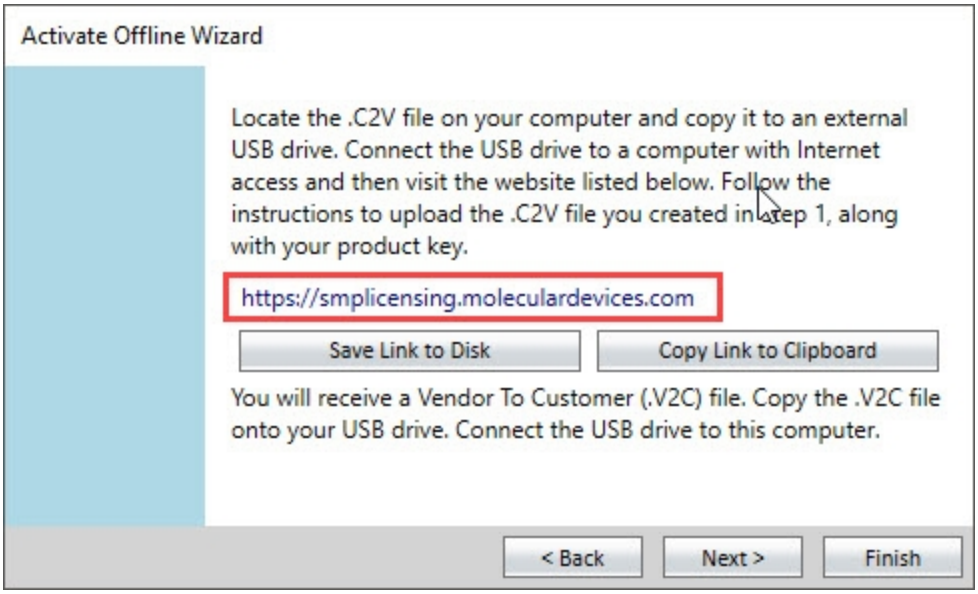
   a. In the **File Name** field, enter a name for the customer to vendor file (.c2v).
   b. Navigate to the folder in which to save the **.c2v** file.
   c. Click **Save**.

4. In the Activate Offline Wizard dialog:

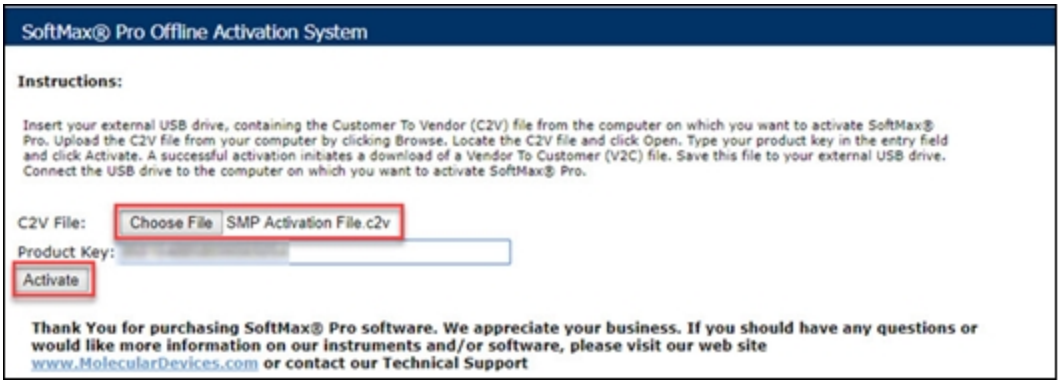


   Note the path to the file and click **Next**.

5. In the Activate Offline Wizard dialog:

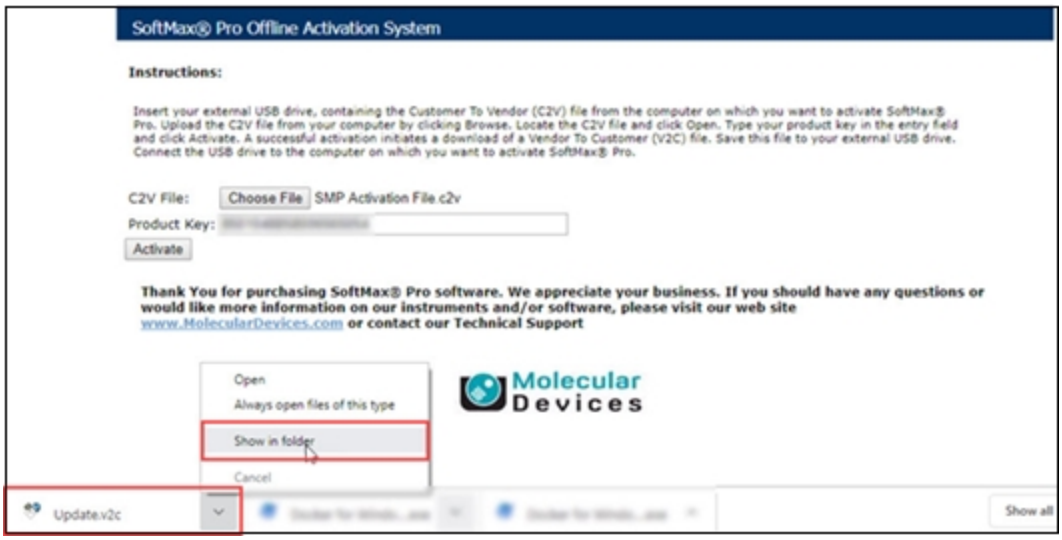


   a. Copy the **.c2v** file to a flash drive.
   b. Click **Save Link to Disk**, **Copy Link to Clipboard** or make note of the link. You need this link for step 8.
6. Take the flash drive to a computer that has access to the Internet.
7. Open an Internet browser and go to: https://smplicensing.moleculardevices.com.
8. On the SoftMax Pro Offline Activation System page:



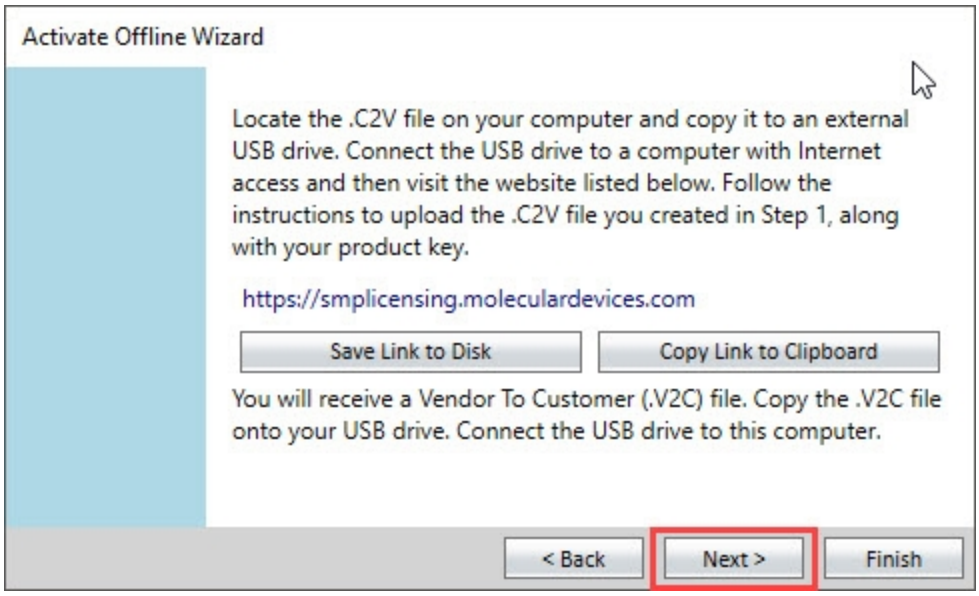
   a. Click **Choose File**.
   b. Navigate to and select the **.c2v** file on the flash drive.
   c. Click **Activate**.

9. On the SoftMax Pro Offline Activation System page:



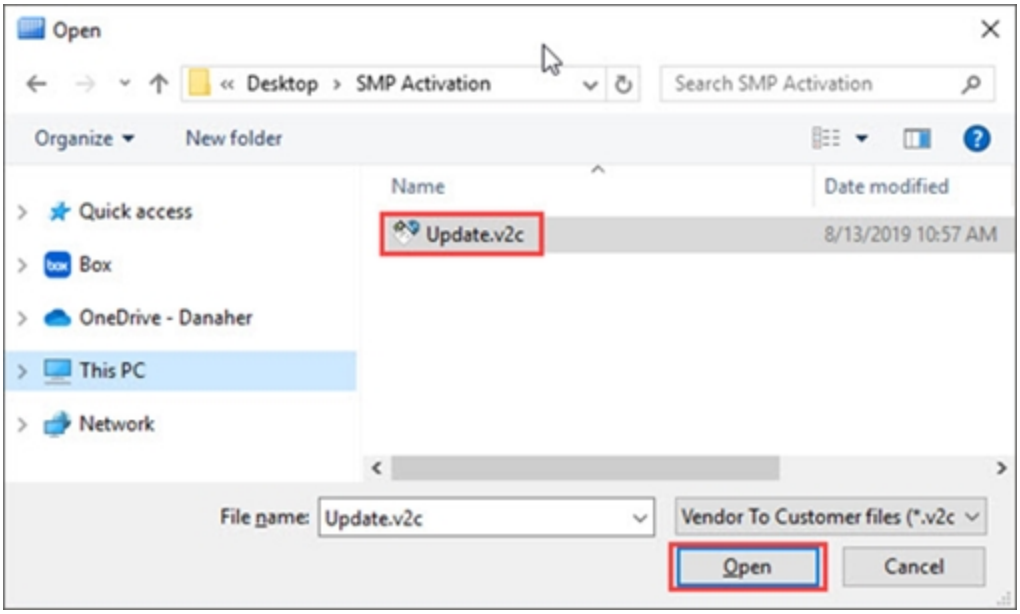
   a. Click **Show in Folder** to display the location of the **Update.v2c** file that the activation system downloads to your computer. Otherwise, locate the **Update.v2c**.
   b. Copy the **Update.v2c** file to the flash drive.

10. Take the flash drive to the computer running the SoftMax Pro GxP Software. In the Activate Offline Wizard:



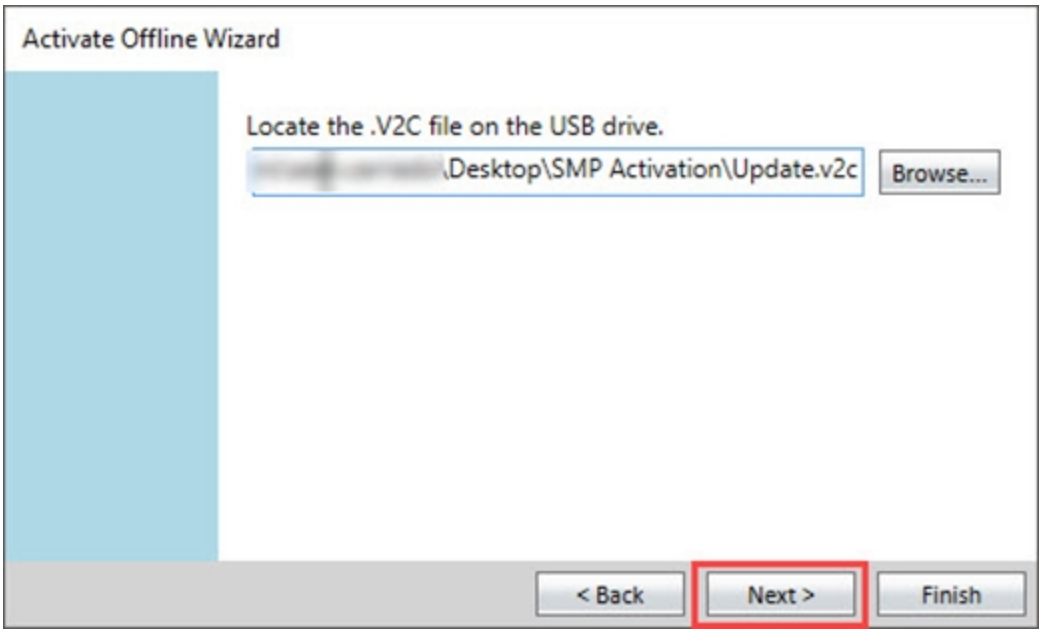
   Click **Next**.

11. In the Open dialog:



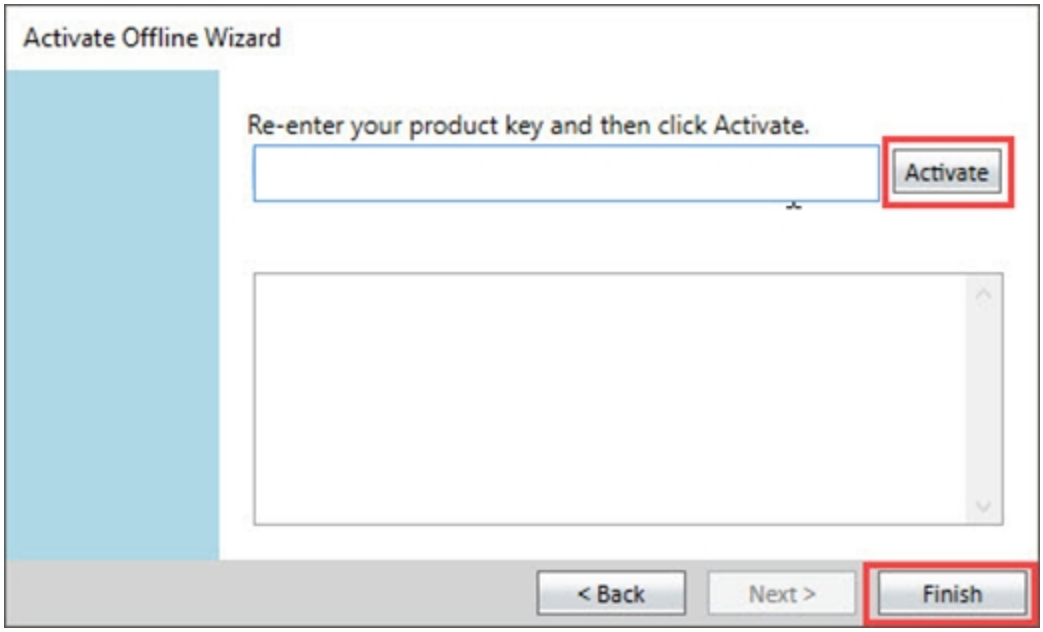
a. Navigate to and select the **Update.v2c** file on the flash drive.
b. Click **Open**.

12. In the Activate Offline Wizard:



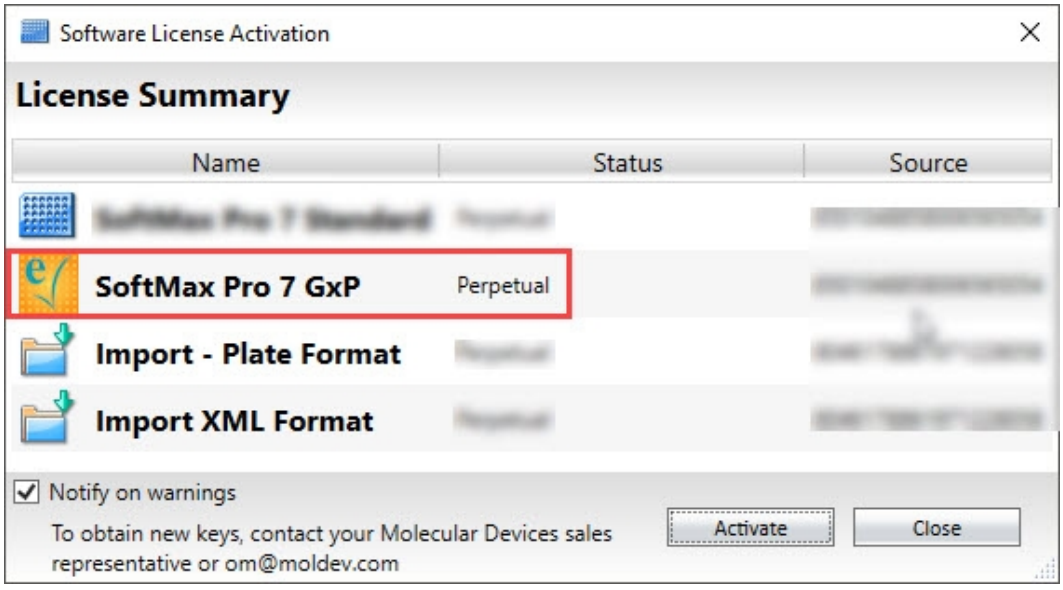
Note the name and location of the **Update.v2c** file and click **Next**.

13. In the Activate Offline Wizard:



    a. In the **Re-enter Your Product Key and then Click Activate** field re-enter the product key.
    b. Click **Activate**.
    c. Click **Finish**.

14. In the License Summary dialog:



Note that SoftMax Pro 7.x GxP has a perpetual license.

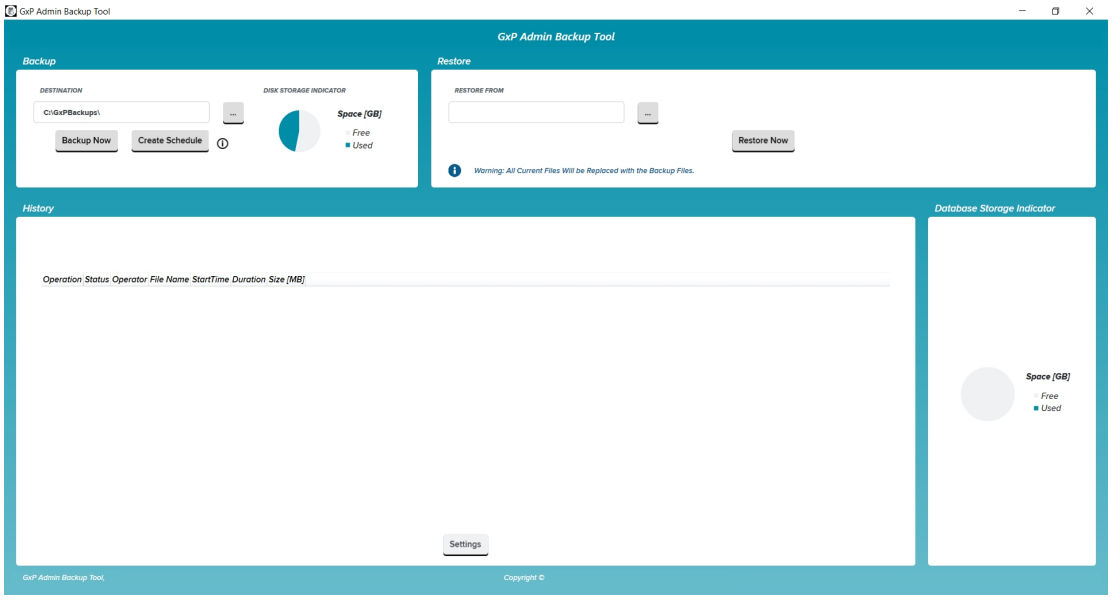
Chapter 6: Backing Up The GxP Admin Database

6

For the single computer setup, the SoftMax Pro 7.1.1 GxP Single Computer Setup Installation Wizard allows you to install the GxP Admin Backup Tool. If you do not have standard Microsoft SQL backup tools, you can use this tool to schedule recurring database backups and to do a backup on an as needed basis.

Note: The GxP Admin Backup Tool is not applicable for the multi computer setup because it is assumed that your network has standard backup procedures in place.

If a backup occurs while the system is in use, there is the possibility that the backup audit trail information could be inconsistent. For example, if a user is actively creating new plates when the backup starts, the backup may save the audit trail entry before the changes to the document are saved. The user continues to work, and the active database is fully consistent. However, the backup contains the audit trail information for the new plates and does not contain the document version with the latest plate added. This is only relevant if you restore the database from such a backup.



Note: Backing up to your Windows user folders, such C:\Users\<CurrentUser>\Documents is not supported and will result in a backup error. Please choose C:\Users\Public\Documents, or other location not in the Windows Users subdirectory.

Backing Up The Database

The GxP Admin Backup Tool creates a report that documents the relevant information in the backup destination folder.

To back up the GxP Admin Software database:

1. Click or locate and double-click **GxPAdminBackupTool.exe** to display the GxP Admin Backup Tool dialog.
2. In the **Backup** area, in the **Destination** field either enter the path to the location to where you want to back up the database or click to display the Browse For Folder dialog.
3. In the Browse For Folder dialog, select the destination location and click **OK**.
4. Click **Backup Now**.

Note: If you logged into the Windows operating system as a user that has administrator privileges to the computer, the GxP Admin Backup Tool displays "Could not backup database" if you select to backup to a folder to which you do not have write permissions such as the Documents folder.

5. The **History** area displays the operation, status, operator, file name (file name is the date and time the backup is created and includes the path to the file), start time, duration, and size of the backup file. The GxP Admin Backup Tool creates a ReportDocx.pdf file in the backup folder for compliance purposes.
6. To manage the backups that display in the History area, click **Settings** to display the Keep Backups dialog.
7. In the **Keep the Last __ Backups** field, enter the number of backups to save and click **OK**.

Note: If you set this to 0 (zero), no backups will be saved and all existing backups will be deleted.

Creating a Backup Schedule

Use the GxP Admin Backup Tool and Windows Scheduler to schedule regular database backups.

To create a database backup schedule:

1. Click or locate and double-click **GxPAdminBackupTool.exe** to display the GxP Admin Backup Tool dialog.
2. In the **Backup** area, click **Create Schedule** to display the Create Schedule Information dialog.
3. Click **Open Windows Scheduler** to display the Task Scheduler dialog.
4. On the left, select **Task Scheduler Library**.
5. In the **Task Scheduler Library**, select the **GxPDatabaseBackupTask**.
6. On the right in the **Actions** area, click **Properties** to display the Properties dialog.
7. Select the **Triggers** tab.

8. Use the **New**, **Edit**, and **Delete** buttons to define when to schedule the backup task to trigger.
9. In the Properties dialog, select the **General** tab.
10. In the **Security Options** area, note the name that appears under When Running The Task, Use The Following User Account. Click **Change User or Group** to select a different user account, if needed.
11. Choose an option:
    - Select **Run Only When User Is Logged On** to have the backup schedule task run when a user is logged on.
    - Select **Run Whether User Is Logged On Or Not** (recommended) to have the backup schedule task run without the need for the user to log on. The user you select in the previous step needs to have the LocalSecurityPolicy assignment "Log on as batch job" Windows permission.
12. In the Properties dialog, click **OK**. If you select Run Whether User Is Logged On or Not, enter the user's password.
13. Close the Task Scheduler dialog.

Restoring From Backup

Note: When you restore the database from a backup, the backup files replace all of the files in the GxP Admin Software database.

To restore the GxP Admin Software database from a backup:

1. Click or locate and double-click **GxPAdminBackupTool.exe** to display the GxP Admin Backup Tool dialog.
2. In the **Restore** area, in the **Restore From** field, either enter the path to the location of the backup file or click ... to display the Browse For Folder dialog.
3. In the Browse For Folder dialog, select the backup file and click **OK**.
4. Click **Restore Now**.
5. Confirm that no other user is logged into the GxP Admin Portal Software or the SoftMax Pro GxP Software.

   Note: Whenever you restore the database, you must confirm that no users are using the SoftMax Pro GxP Software or the GxP Admin Portal Software. Restoring while users are logged in may lead to inconsistent data.

6. Click **OK** in the message dialog. The History area displays the operation, status, operator, file name, start time, duration, and size of the backup file.
7. After a restore operation, check the recent audit entries for inconsistencies and make sure to document any inconsistencies accordingly.

Obtaining Support

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