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1. Introduction

Platinum Software (REF: 400600) is an application for managing data acquired from Capillary Electrophoresis (CE) instruments and SAS gel scans that has evolved with robust functionalities and innovation in science and technology to facilitate swifter data acquisition, processing, and analysis. The transition of Platinum Software has always been driven by customer requests and technological advancement, which birthed the release of Platinum Software patches for quick and easy software upgrades.

Platinum Software patches are released to upgrade, update, and improve Platinum Software functionalities both clinically and technologically, to maintain state of the art in clinical electrophoresis data analysis. This document details the steps required to upgrade and update Platinum Software.

2. Before Upgrading or Updating Platinum Software:

Working with the latest patch of Platinum Software opens doors to exploring additional functionalities in Platinum software. To achieve a successful upgrade or update of Platinum software, it is necessary to consider and adhere to the following listed requirements:

2.1 Prepare the Customer

Provide the relevant patch release notes to the customer and obtain approval for the upgrade to be performed.

2.2 Verify Platinum software-enabled PC Specification:

During development and before the final release of the Platinum Software patch version, it is validated against a specific PC specification. One of the major underlying factors for Platinum Software to perform optimally is installing the software on the validated PC specification. Please refer to document CE-0022 to confirm the latest hardware specifications for Platinum PCs.

2.3 Review Database Management System:

The pace at which Platinum Software reads and writes to its associated database management system is one of the essentials that ensures the software performs optimally. Platinum Software versions from 6.1 onwards are designed to seamlessly integrate with Microsoft SQL Server applications to achieve the desired output when processing acquired data. It is important to review and ensure that the MSSQL server application is implemented as the associated database management system for Platinum Software versions 6 onwards.

Platinum Software associated database type can be viewed from the Database Information tab in the Database menu. ('Platinum Login > Configure > Database > Database Information').

Installations of Platinum 6.1.201 onwards will be MSSQL by default.

Please refer to HL-2-P-3456 Platinum 6 SQL Setup Guide for implementation of SQL for software versions prior to 6.1.201 and for advice on networked MSSQL setup for all versions of Platinum.

Note: If the database is networked, it is also important to review CE-0022 for the recommended DBMS specifications and inform the customer prior to any upgrades should their DBMS also require upgrading to be compatible with the intended Platinum upgrade. The upgrade of the DBMS should be performed simultaneous to the Platinum upgrade.

2.4 Verify Platinum Software Methods:

Platinum Software methods files are preconfigured test parameters required for analysing samples introduced to the CE machine or gel scans of results introduced to Platinum via the optical densitometry scanner. Every Platinum patch version is validated with corresponding configured standard methods files found within the Platinum directory – ‘methods.gel’ for capillary and gel preparation methods and ‘gels.gel’ for the gel scanning methods. These are attributed to a single method file name within **Configure> Methods** of the Platinum Software, e.g., MF1XXX and GF1XXX*.

Each method file in Platinum can take two different forms: the standard method file and the bespoke method file. The standard method file contains validated methods configured by default in the Platinum software patch with the name format MFXXXX or GFXXXX*. A bespoke method file is created upon request by customers and validated by the customer, with the name format MF0XXX or GF0XXX*.



In the above method file name format, the first three alphanumeric characters represent the method file type, while the last three numbers represent the method file version. For capillary and gel preparation method files the method name can be viewed in the ‘Configure Standard Methods tab’ of the **Methods** submenu in the **Methods** menu page (Platinum Login > Configure > Methods > Methods > Configure Standard Methods) (Figure 1).

For gel methods files the method name can be viewed in the 'Configure Standard Methods tab' of the **Configure Gels** submenu in the **Methods** menu page ('Platinum Login > Configure > Methods > Configure Gels > Configure Standard Methods').

**Please be aware that this rule is true for GF1001 and all methods files including and subsequent to GF1010. Please contact technical services for clarification on gel methods GF1002 - GF1009.*

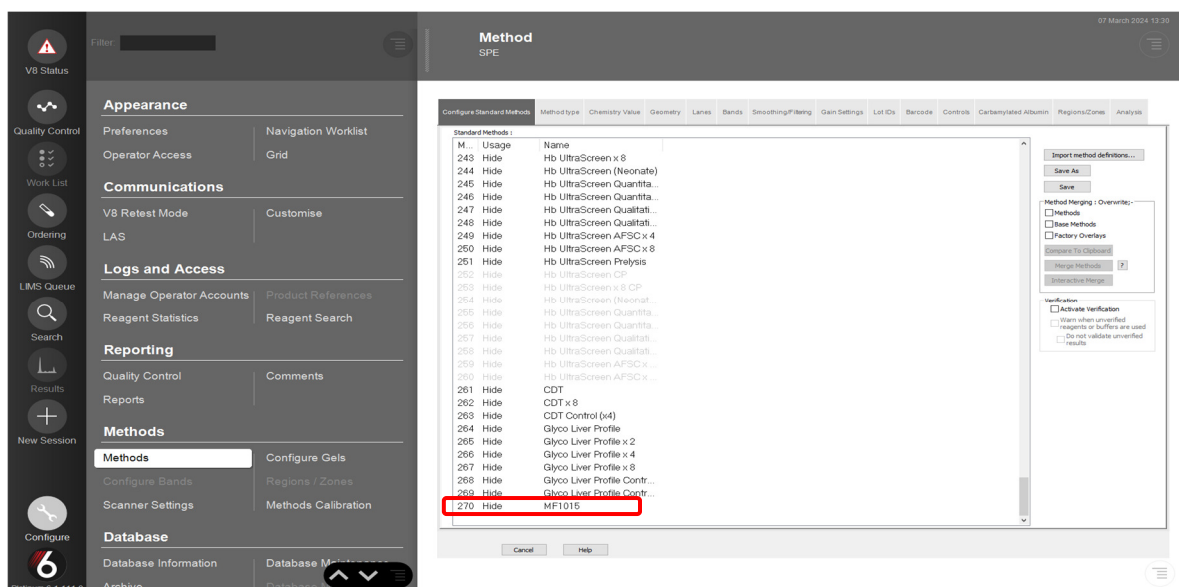


Figure 1. Locating capillary/gel preparation method file name in Platinum

Note: When updating methods files, review the bands tab of any in use methods for customer specific reference ranges. Customer specific reference ranges that have been input into the software will need to be manually transcribed to an updated methods file ('Platinum Login > Configure > Methods > Methods/Configure Gels > Bands').

2.5 Review CE Firmware Version:

For CE users it is best practice to ensure that the instrument firmware is also kept up to date alongside the Platinum Software as the two work together to provide capillary electrophoresis and gel preparation results. Please refer to HL-2-P-2500 for the latest release notes and upgrade instructions.

2.6 Complete Gel Scans

When gel trays are prepared by the CE system a temporary worklist file (.wl0) is created in the location for new data to allow the transfer of information from the CE session to the gel session. Before proceeding with the update, ensure that all gels that had a tray prepared by a CE system are scanned into the Platinum Software.

2.7 Obtain Backups:

Ensuring holistic backup of all Platinum Software resources and its associated database management system (DBMS) is an important factor to be considered before upgrading Platinum Software to its latest version and patch. The following are Platinum Software resources to backup prior to update:

- a. Backup the platinum folder in C:\Program Files\Platinum (Allows back up of all Platinum configurations)
- b. Backup the 'location of new data' folder (session files) if specified, if it is not specified the default location of C:\Program Files\Platinum and thus covered in point a (Platinum Login > Configure > Communications > Database)
- c. Backup MSSQL database if it has been adopted as the DBMS of Platinum Software. For more information on how to backup the Platinum software MSSQL database please refer to HL-12-APP-0011 document.
- d. Backup MS Access database if it has been adopted as the DBMS of Platinum Software and is not in the default location of C:\Program Files\Platinum and thus covered in point a. Then, consider upgrading database management system to MS SQL and importing the MS Access database into the MS SQL database referring to HL-12-APP-0008.

Note: Step (d) is essential when transitioning from a Platinum 6.1 windows 10 patch to a Platinum 6.1 windows 11 patch (6.1.201 and above) as MS Access will no longer be available.

2.8 Prepare the necessary files:

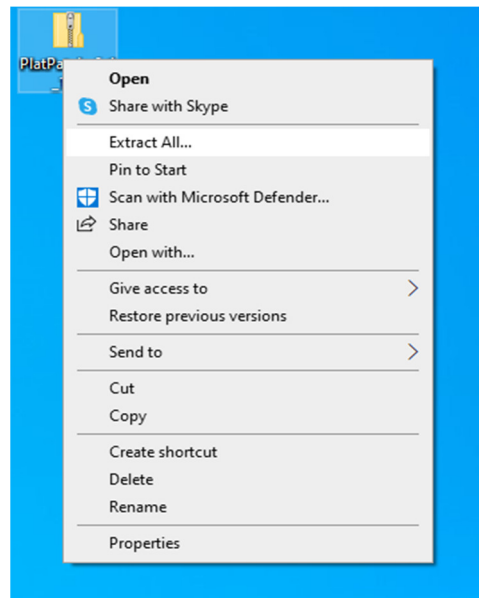
When upgrading to a new, major Platinum version, i.e. moving from 6.1 to 6.2, a new Platinum installation will need to be performed and as such both the Installation and the latest Platinum Patch files will be required.

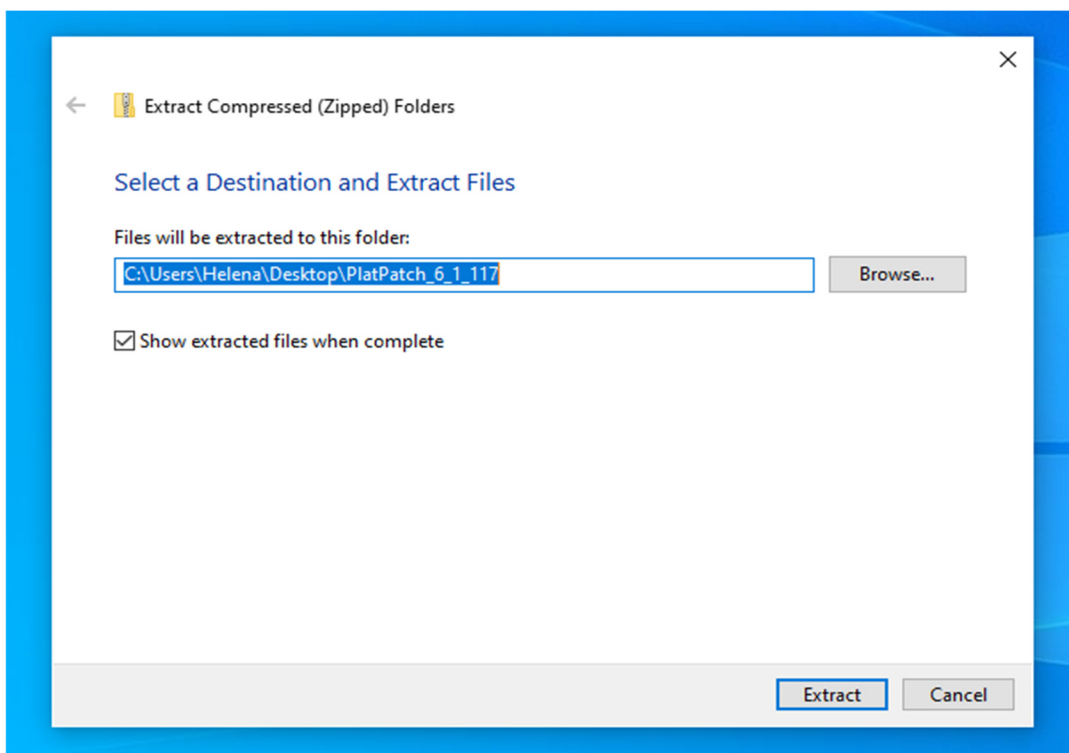
If upgrading within Platinum versions i.e. 6.1.135 to 6.1.137 then only the Platinum Patch file will be required – **skip to Section 4 after completing this section***.

****Note: The exception to this is when upgrading operating systems i.e. when upgrading the operating system from windows 10 to windows 11, a new install will also be necessary requiring both the Installation and the latest Platinum Patch files.***

Preparing the necessary files:

- Download the zipped folder of the latest Platinum Software Patch (and installer, if applicable) from the Helena Biosciences Europe website: <https://www.helena-biosciences.com/en/clinical-electrophoresis/platinum-download/>
- Copy the zipped Platinum Software folder onto desktop of the Platinum enabled PC.
- Right-click on the zipped Platinum Software folder and select extract all.
- Please note the selected destination directory for the extracted Platinum Software file, then click 'Extract'.





2.9 Review Customer Specific Configurations:

When completing a Platinum patch upgrade (upgrades within Platinum versions) all customer configurations will be retained, except for customer specific reference ranges.

When completing a major upgrade i.e. a new installation, the following customer specific configurations should be noted and transferred to the new installation:

- Demographics setup
- Chemistry Value setup
- LIMS setup
- Customer Specific Reference Ranges
- Report Setup

3. To Upgrade to a New Installation of Platinum Software:

These instructions are specific to the complete uninstallation of all Platinum related programs, prior to installation of a new, major Platinum version. This method of installation ensures users have been sufficiently updated across major releases. This will ensure the correct patch, methods file, gels file, product references file, Hb Overlays and Reports are updated. Additionally, this includes the update to the correct version of the DBMS and Epson Scanner drivers.

Note: If the database is networked, and managed by the customer IT team, then uninstalling MS SQL and related programmes will not be necessary. However, as per section 2.3, inform the user and ensure that the MS SQL database is of the correct specification/ confirm it will be upgraded to the correct specification by the customer IT team simultaneous to the Platinum upgrade.

Note: It is essential to complete step 2.7 and obtain backups.

- a. With the database and session files backed up, the Platinum folder in C:\Program Files\ can be deleted.
- b. Following this, go to **Settings > add or remove programs** on the PC and uninstall the following applications:
 - Platinum
 - PlatinumPDF
 - EPSON Scan
 - Active Directory Authentication Library for SQL
 - Browser for SQL Server 2017
 - Microsoft ODBC Driver 13 for SQL Server
 - Microsoft ODBC Driver 17 for SQL Server
 - Microsoft OLE DB Driver for SQL Server
 - Microsoft SQL Server 2012 Native Client
 - Microsoft SQL Server 2017 (64-bit)
 - Microsoft SQL Server 2017 Setup (English)
 - Microsoft SQL Server 2017 T-SQL Language
 - Microsoft SQL Server Management Studio –
 - Microsoft VSS Writer for SQL Server 2017
- c. For uninstalling SQL related programs, please follow the instructions for uninstalling the Microsoft SQL Server 2017 (64-bit) and Microsoft SQL Server Management Studio. Programs may need to be removed in a certain order (it will warn you if removal of another program is required first). If warned that an SQL program is relied upon, please wait to uninstall this program to ensure the programs are uninstalled in the correct order. This prevents any failed uninstall attempts resulting in a partially uninstalled SQL.
- d. Additionally, in **C:\Program Files\Microsoft SQL Server**, delete any versions of the folder **MSSQL14.SQLEXPRESS** – this will remove any previous folders that could clash with the new version of SQL created.
- e. **Please restart the PC.**
- f. Complete the new install. Follow HL-2-P-3334 Installing Platinum 6 if using windows 10 operating systems. Following HL-2-P-3617 if using windows 11 operating systems.

- g. If connecting to an existing, populated MS SQL database, refer to the guides in step (f) to reconfigure the connection. If MS SQL has been uninstalled and reinstalled as part of the upgrade process, refer to HL-12-APP-0008 to reimport the customers database and session files.
- h. Configure Platinum according to customer preferences.

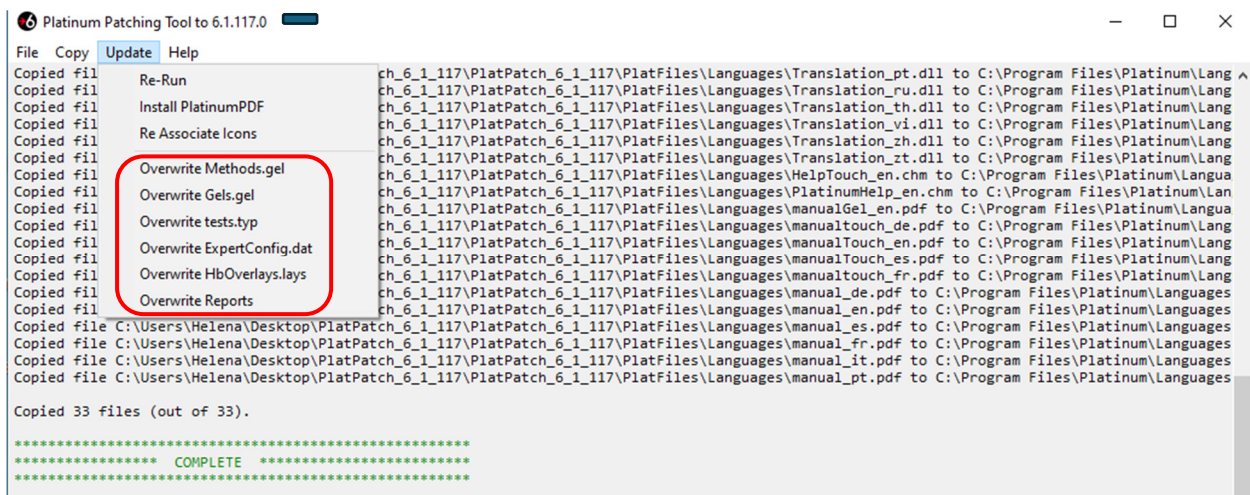
4. To Perform a Patch Upgrade:

Please note that patch upgrades are irreversible and once updated, you will not be able to back patch. We recommend creating backups as previously described to ensure a copy of the original settings and database is made and can be used if needed.

- a) Copy the unzipped Platinum patching folder onto desktop of the PC to be updated.
- b) Open the unzipped folder and run **PlatPatch.exe** – **do not** run the patch as administrator.
- c) Installation will begin. This can take some time depending on the size of the database therefore it is important that you do not close the patching program until the patching process is complete. Please note that the program does not self-terminate, therefore when the following window appears, the upgrade is complete:



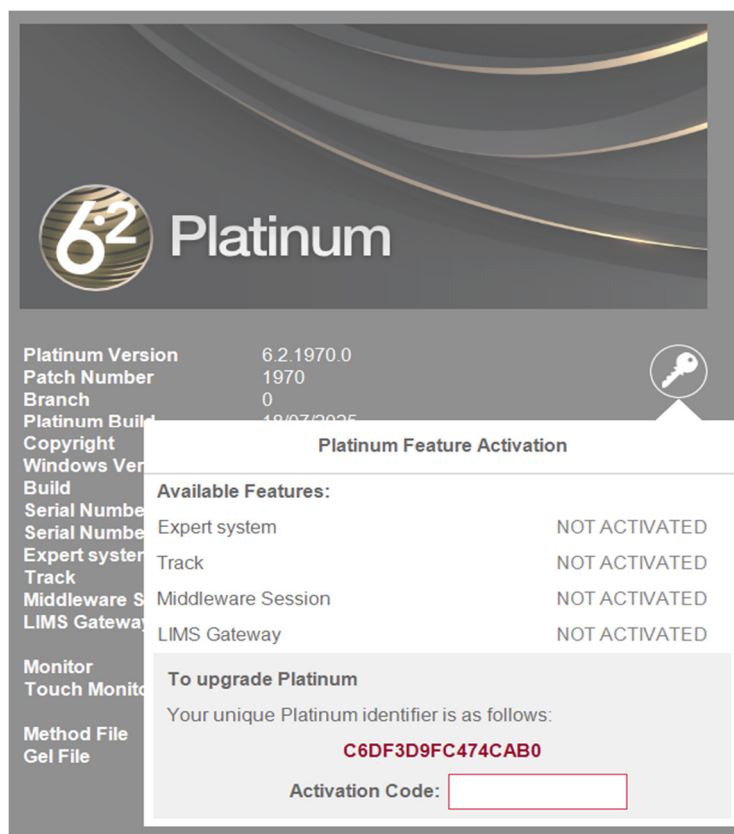
- d) On the Platinum Software patching tool consider the advisories below before clicking on Update and overwriting the highlighted functions, if required.



- e) The requirement for selecting overwrite is as follows:
- i. Overwrite 'Methods.gel' to the latest methods file release, except if there is a bespoke methods file currently installed. If a bespoke methods file is installed, then a new bespoke methods file will need to be created with the latest methods file release as the base method (see section 'Verify Platinum Software Methods').
 - ii. Overwrite 'Gels.gel' to the latest methods file release except if there is a bespoke methods file currently installed. If a bespoke methods file is installed, then a new bespoke methods file will need to be created with the latest methods file release as the base method (see section 'Verify Platinum Software Methods').
 - iii. If the customer has a bespoke method, contact Helena Biosciences Europe Technical Support in this case.
 - iv. Overwrite 'test.typ' which stores reagent and buffer configuration types.
 - v. Do not overwrite 'ExpertConfig.dat' if the customer has Expert System Configurations.
 - vi. Do not overwrite 'HbOverlays.lays' if the customer has added their own examples to the Hb library within Platinum.
 - vii. Do not overwrite reports if the customer has their own customised reports.
- f) Open Platinum and log in as normal. The upgrade will now be installed.
The unzipped and zipped patch folder can be deleted.

5. Product Activation:

To enable additional features, an additional payment is required and an order should be placed prior to activation. Depending on the Platinum version, the features available in this additional upgrade are Expert System, Track connectivity, Middleware Session and LIMS Gateway. To activate these features the customer must initially acquire their unique Platinum identifier by going to the **Login** page and clicking on the **Platinum Feature Activation Key** symbol.



This code must be emailed to the Technical Services department (support@helena-biosciences.com), making sure you specify which features you would like to activate. Technical Services will verify that an order has previously been placed for the requested features and respond with the activation code. This should be entered into the **Activation Code:** box in the **Platinum Feature Activation** window. A window should appear stating the activation code was successful and that Platinum needs to shut down. When Platinum is reopened, go back to the **Platinum Feature Activation** window and it will display the features that have been successfully activated.

6. Upgrade Checklist

Section	Sign and date once completed:
2.1 Prepare the Customer	
2.2 Verify Platinum software-enabled PC Specification	
2.3 Review Database Management System	
2.4 Verify Platinum Software Methods Review Customer Specific Reference Ranges	
2.5 Review CE Firmware Version	
2.6 Complete Gel Scans	
2.7 Obtain Backups	
2.8 Prepare the Necessary Files	
2.9 Review Customer Specific Configurations	
3.0/ 4.0 Perform the upgrade (according to the applicable section)	
5.0 Product Activation	

To be completed by the person performing the upgrade:

Name:	
Job Title:	
Patch Version Upgraded to:	
Comments:	

Sign:

Date:

To be completed by the responsible person at the customer site:

Site Name:	
Responsible Person Name:	
Responsible Person Job Title:	

Sign:

Date:

Platinum has been upgraded to a later version, details of which have been provided in an accompanying patch release notes document. During the patching process an installation verification has been performed by Helena Biosciences to ensure correct application of the patch and that core functionality has not been affected, however user specific usage has not been reviewed.

I, the responsible person identified above, understand that a review of new features outlined in the release document and local change control / verification of platinum performance should be carried out to ensure continuity of performance.

Sign:

Date: