

ThermoFisher SCIENTIFIC

Applied API Training for Exactive Series software

Revised version of May 2018, FGC/AK

Introduction

- API = Application programming interface
 - Something that allows third-party applications to link a provided feature set
 - Examples: Windows programming interface; browser plugins; bluetooth remote control in your car
- Exactive Series instruments introduced an API in 2.1 (ASMS 2012)
 - enable customers to develop new features / techniques
 - inspect data on the fly

Aim of the training

- Understand how deep you can dig into instrument details
- Understand how to drive the instrument
 - and what is the best approach
- Learn how to write API-accessing programs
- Find new ideas what you can do with current instrumentation

The training will not help for (detailed) questions about

- Xcalibur / Foundation
- Running / operating / calibrating the instrument
- Specific hardware elements in the MS

Topics

- Recap of .NET and C# features needed to understand the talk
- Setting up a work bench
- Connecting to the API
- Handling the connection to the instrument
- Gathering data
- Placing scans
- Replacing inclusion and exclusion lists
- Setting individual values
- Running methods

Recap of .NET and C# features needed to understand the talk

Some understanding should be present on

Windows OS

Xcalibur

- QualBrowser
- RAW files in general
- setting up a method
- setting up an acquisition

.NET

- 2.x knowledge will do for reading
- 4.x is best for writing, Exactive still uses 2.x interfaces, to support this use app.config entry <startup useLegacyV2RuntimeActivationPolicy="true">
- C# >= 2.0
 - Solid knowledge required on events, event handlers,
 - knowledge about multithreading helpful
 - Other languages supported: MatLab, PowerShell, Managed C++, all .NET languages

Setting up a work bench

- Always install newest software!
- Exactive Series instrument is required
- Windows software
 - Windows 7 or Windows 10 running the MS driver, use Tune for testing communication
 - Visual Studio 2010+ (2015 is recommended)
 - Requires an Exactive Series API license
 - Example program helps
- Use present documentation
 - Regular Exactive software installs C:\Xcalibur\system\Exactive\bin\ESAPI_Help.zip containing documentation about call interfaces etc.

Connecting to the API (Hands-on)

- Fire up instrument and Exactive Tune, make sure there is a connection
- Open VS, create a project (C#, Windows, Classic Desktop, Console application, implies MSIL, 32 bit)
- Edit app.config

- Open ESAPI_Help.zip, open chm file and copy the initial example into a new class, e.g. "Connect"
- References are missing: Add some dependencies from Exactive bin folder
 - API-1.0.dll
 - API-1.1.dll
 - ESAPI-1.0.dll
 - ESAPI-1.1.dll
- Resolve missing references
- Instantiate and execute class in Program.cs

```
new Connect().DoJob();
Console.WriteLine("Press any key to continue...");
Console.ReadKey();
```

Run

Connecting to the API the old way (Hands-on)

Replace GetApilnstance code by

Type type = Type.GetTypeFromProgID("Thermo Exactive.API_Clr2_32_V1", true);
object o = Activator.CreateInstance(type);
return (IInstrumentAccessContainer) o;

Run

Background

ProgIDs refer to the so called COM concept of Microsoft, a CORBA-like implementation of remote access architecture.

COM allows to link even into other processes, breaking the boundary of 32bit/64bit and .NET2/.NET4, but also throw errors that are not understandable and can be influenced by system-wide configuration settings, that may stop proper working.

Moreover, Exactive's architecture makes the COM server being an inproc-server, meaning that the bitness and .NET-version restrictions are still in place with the advantage of immediate responses and low system resources usage. COM magic inside .NET let you just assume that it would work.

Connecting to the API (best-practice for training)

Establish your own standard routine to get access to the instrument

Safely assume that the first instrument is the only instrument

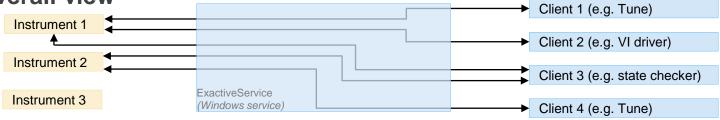
```
using System;
using System.Reflection;
using Microsoft.Win32;
using Thermo.Interfaces.ExactiveAccess_V1;
using Thermo.Interfaces.InstrumentAccess_V1;
namespace ProgramNameSpace
   static class Connection
       const string InstrumentName = "Thermo Exactive";
       const string ApiFileNameDescriptor = "ApiFileName_Clr2_32_V1";
       const string ApiClassNameDescriptor = "ApiClassName_Clr2_32_V1";
      static private IInstrumentAccessContainer m_container = null;
       static private IInstrumentAccessContainer GetContainer()
          string baseName = @"SOFTWARE\Finnigan\Xcalibur\Devices\" + InstrumentName;
          using (RegistryKey key = Registry.LocalMachine.OpenSubKey(baseName))
             if (key != null)
                 string asmName = (string) key.GetValue(ApiFileNameDescriptor, null);
                 string typeName = (string) key.GetValue(ApiClassNameDescriptor, null);
                 if (!string.IsNullOrEmpty(asmName) && !string.IsNullOrEmpty(typeName))
                    Assembly asm = Assembly.LoadFrom(asmName);
                    return (IInstrumentAccessContainer) asm.CreateInstance(typeName);
          throw new Exception("Cannot find API information of instrument \"" + InstrumentName + "\" in the registry.");
       // Returns an implementation of the first instrument of the API that REQUIRES a call to Dispose finally.
       static internal IExactiveInstrumentAccess GetFirstInstrument()
          if (m container == null)
             m container = GetContainer();
          return (IExactiveInstrumentAccess) m container.Get(1);
```

Handling the connection to the instrument (background)

ExactiveService is,,man in the middle"

- Connections are established on demand of clients and instruments independently
- Service doesn't keep (much) state information of instrument → clients have to wait for feedback of actions
- Special classes in API maintain some overall state, but individual values require event-driven waits

Overall view



Individual view (client's perspective)

· typically, only one instrument is connected



Good practice

- Never use Thread.Sleep (Thread.Sleep (n) → Thread.CurrentThread.Join (n))
- Don't poll (use event driven model)
- · Always consider a disconnected instrument

Handling the connection to the instrument (Hands-on)

 Create a standard API program and write a handler for instrument connection changes and compare with Tune's instrument state on instrument reboot

• First result: Connected doesn't mean we can use the system as with Tune, it is just "connected" Tune grants user access later than instrument has been connected.

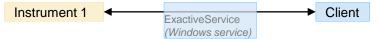
Handling the connection to the instrument properly (Hands-on)

Rely on Control.Acquisition to maintain a proper connection, observe in Tune a reboot of the instrument

```
class Properly
  internal void DoJob()
     using (IExactiveInstrumentAccess instrument = Connection.GetFirstInstrument())
        Console.WriteLine("Waiting 60 seconds for connection changes using event listening...");
        // Best way is to use instrument.Control.Acquisition.WaitFor or a pure event handler of StateChange, but for demonstration, we display the changes in ConnectionChanged and StateChanged.
        instrument.Control.Acquisition.StateChanged += Acquisition StateChanged;
        instrument.ConnectionChanged += Instrument ConnectionChanged;
        Thread.CurrentThread.Join(60000);
        instrument.ConnectionChanged -= Instrument_ConnectionChanged;
        instrument.Control.Acquisition.StateChanged -= Acquisition StateChanged;
  private void Instrument_ConnectionChanged(object sender, EventArgs e)
     IExactiveInstrumentAccess instrument = (IExactiveInstrumentAccess) sender;
     Console.WriteLine("\n" + DateTime.Now.ToString("HH:mm:ss,fff ") + instrument.InstrumentName + " connected:" + instrument.Connected);
  private void Acquisition_StateChanged(object sender, StateChangedEventArgs e)
     Console.WriteLine(DateTime.Now.ToString("HH:mm:ss,fff ") + "Overall description:
                                                                                           " + e.State.Description);
     Console.WriteLine(DateTime.Now.ToString("HH:mm:ss,ffff") + "Instrument mode:
                                                                                           " + e.State.SystemMode);
     Console.WriteLine(DateTime.Now.ToString("HH:mm:ss,fff") + "Instrument system state: " + e.State.SystemState);
```

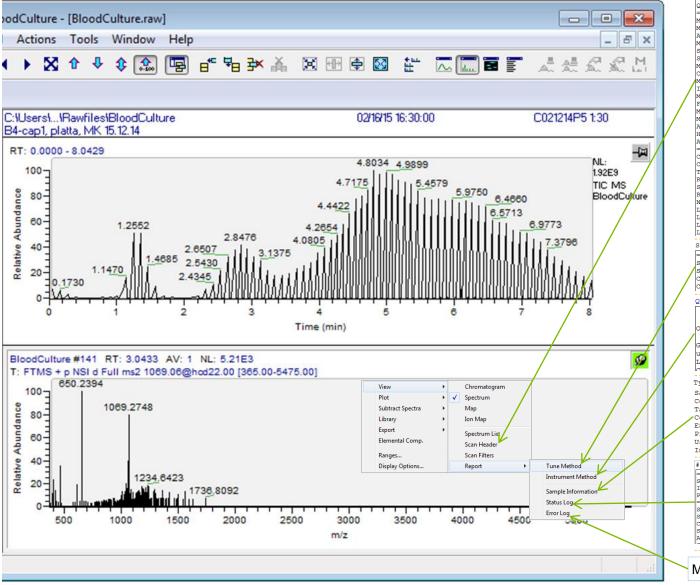
Gathering data of Exactive (Background)

- Instrument gathers data all the time except if Off/Standby
- "External" programs write data on their own to raw files
- Service distributes gathered data <u>concurrently</u> to all clients



- includes MS spectra
- includes analog channels
- No license is required for API programs to listen to data streams
- Data is sent in packets, packets are placed in shared memory
 - data is compressed in a proprietary format
 - data is expanded in API during access
 - instrument sends data for all scans shown in Tune
- For an acquisition, start and end yield separate events

Gathering data of Exactive (Background)



```
136388580.00
 Total Ion Current:
                                    600.00
 Scan Low Mass:
 Scan High Mass:
                                    1300.00
 Scan Start Time (min):
                                    0.0551
 Scan Number:
                                 1263997.90
 Base Peak Intensity:
 Base Peak Mass:
                                    859.61
Scan Mode:
                            FTMS + p NSI Full ms [600.00-1300.00]
Q Exactive HF Orbitrap Data:
Multiple Injection:
                                       Scan info, header and trailer
Multi Inject Info:
                            IT=19
Micro Scan Count:
Scan Segment:
Scan Event:
 Master Index:
 Charge State:
 Monoisotopic M/Z:
                            0.0000
                            35.373
 Ion Injection Time (ms):
Max. Ion Time (ms)
                            200.00
FT Resolution:
                            120000
MS2 Isolation Width:
                             700.00
MS2 Isolation Offset:
AGC Target:
                            5000000
HCD Energy:
Analyzer Temperature:
                            29.24
 === Mass Calibration: ===
 Conversion Parameter B:
                            211725563.3158
                            68862385.8235
 Conversion Parameter C:
Temperature Comp. (ppm):
                            -4.83
                            -0.26
RF Comp. (ppm):
                            -0.68
Space Charge Comp. (ppm):
Resolution Comp. (ppm):
                            -0.38
Number of Lock Masses:
Lock Mass #1 (m/z):
                            0.0000
Lock Mass #2 (m/z):
                            0.0000
Lock Mass #3 (m/z):
                            0.0000
LM Search Window (ppm):
                           0.0
Segment: 1
 === Tune Data: ===:
Spray Voltage (+):
                                           Set values coming from
                                  1500.00
Spray Voltage (-):
                                           Tune File
 Capillary Temperature (+ or +-):
                                  300.00
Capillary Temperature (-):
Q Exactive HF - Orbitrap MS
                              Method of Q Exactive HF
 OVERALL METHOD SETTINGS
                              Same as summy tab in ME
Global Settings
use lock masses
Lock mass injection
Chrom neak width (FWHM)
Type: Unknown ID: 1 Row: 0
Sample Name:
                        C021214P5 1:30
                       B4-cap1, platta, MK 15.12.14 Info from
Comments:
Taxonomy:
Column:
                                                      Sequence Setup
ESI interface:
                        EASYSpray/E028
                        Matterhorn
Project:
User:
Instrument Method:
                       C:\Xcalibur\methods\MS2 Niilo Prot 01.meth
# 1 Status Log Time: 0.0551
==== Overall Status:
                          Info: Vacuum System - Diagnose - Ultra Higi
Ignition (1.9V, 1124 h)
                                                      Transferred by
   === Ion Source:
 Spray Voltage (V)
                            2118.7
                                                      Exactive every
 Spray Current (µA)
 Capillary Temperature (°C)
                             300.08
                                                      10 seconds
Aux gas flow rate
May contain info about issues messing up the RAW file
```



Gathering data of Exactive (Hands-on, excercise)

Bind to instrument and do an initial listening to acquistion start, end, and scan generation

```
using IMsScan = Thermo.Interfaces.InstrumentAccess_V2.MsScanContainer.IMsScan;
namespace KeepInstrumentConnection
  class DataReceiver
     internal void DoJob()
         using (IExactiveInstrumentAccess instrument = Connection.GetFirstInstrument())
            IMsScanContainer orbitrap = instrument.GetMsScanContainer(0);
            Console.WriteLine("Waiting 60 seconds for scans on detector " + orbitrap.DetectorClass + "...");
            orbitrap.AcquisitionStreamOpening += Orbitrap_AcquisitionStreamOpening;
            orbitrap_AcquisitionStreamClosing += Orbitrap_AcquisitionStreamClosing;
            orbitrap.MsScanArrived += Orbitrap_MsScanArrived;
            Thread.CurrentThread.Join(60000);
            orbitrap.MsScanArrived -= Orbitrap_MsScanArrived;
            orbitrap_AcquisitionStreamClosing -= Orbitrap_AcquisitionStreamClosing;
            orbitrap.AcquisitionStreamOpening -= Orbitrap AcquisitionStreamOpening;
     private void Orbitrap_MsScanArrived(object sender, MsScanEventArgs e)
        using (IMsScan scan = (IMsScan) e.GetScan())
                                                       // caution! You must dispose this, or you block shared memory!
            Console.WriteLine("\n{0:HH:mm:ss,fff} scan with {1} centroids arrived", DateTime.Now, scan.CentroidCount);
     private void Orbitrap AcquisitionStreamClosing(object sender, EventArgs e)
        Console.WriteLine("\n{0:HH:mm:ss,fff} {1}", DateTime.Now, "Acquisition stream closed (end of method)");
     private void Orbitrap AcquisitionStreamOpening(object sender, MsAcquisitionOpeningEventArgs e)
        Console.WriteLine("\n{0:HH:mm:ss,fff} {1}", DateTime.Now, "Acquisition stream opens (start of method)");
```

Gathering data of Exactive Series instruments (Background)

- Exactive scan data (IMsScan : IDisposable) contains
 - spectrum (IEnumerable of centroids)
 - m/z
 - intensity
 - charge
 - resolution
 - profile shape (optional, must be accessed during access of spectrum enumeration)
 - flags: IsExceptional, IsFragmented, IsMerged, IsMonoisotopic, IsReferenced
 - noise band (IEnumerable of noise-nodes, to be considered as polygon)
 - m/z
 - intensity
 - baseline (empty for Exactive)
 - meta data
 - Generic header (common)
 - Trailer
 - Status
 - TuneData
 - fixed for Acquisition

Gathering data (Hands-on, exercise and demonstration)

Output of scan without meta data and profiles is straight-forward

- Maintain a separate thread for data processing (e.g. using a queue): you can block the service otherwise
- Profile data must be accessed only within enumeration of centroids: Consider copying data

```
Console.WriteLine("\n{0:HH:mm:ss,fff} scan with {1} centroids arrived", DateTime.Now, scan.CentroidCount);
#if ProfileAccessInsideEnumeration
   int max = 5;
   foreach (ICentroid c in scan.Centroids)
      if (max-- == 0)
         break;
      Console.Write("{0:F4},{1:0.0e0},z={2} : ", c.Mz, c.Intensity, c.Charge);
      Console.WriteLine(string.Join("; ", c.Profile.Take(5).Select(n => string.Format("{0:F4},{1:0.0e0}", n.Mz, n.Intensity))));
#elif ProfileAccessOutsideEnumeration
   ICentroid[] list = scan.Centroids.ToArray();
   for (int i = 0; i < Math.Min(5, list.Length); i++)</pre>
      ICentroid c = list[i];
      Console.Write("\{0:F4\},\{1:0.0e0\},z=\{2\}: ", c.Mz, c.Intensity, c.Charge);// works
      Console.WriteLine(string.Join("; ", c.Profile.Take(5).Select(n => string.Format("{0:F4},{1:0.0e0}", n.Mz, n.Intensity)))); // crashes enumeration happened in ToArray call
#else
  // Create an array where the profile is copied on enumeration
   Tuple<ICentroid, IMassIntensity[]>[] list = scan.Centroids.Select(n => new Tuple<ICentroid, IMassIntensity[]>(n, (IMassIntensity[]) n.Profile.Clone())).ToArray();
   for (int i = 0; i < Math.Min(5, list.Length); i++)</pre>
      Tuple<ICentroid, IMassIntensity[]> tuple = list[i];
      Console.Write("{0:F4},{1:0.0e0},z={2} : ", tuple.Item1.Mz, tuple.Item1.Intensity, tuple.Item1.Charge); // works
      Console.WriteLine(string.Join("; ", tuple.Item2.Take(5).Select(n => string.Format("{0:F4},{1:0.0e0}", n.Mz, n.Intensity)))); // works
#endif
```

Gathering meta data (Background)

Meta data is send by the instrument

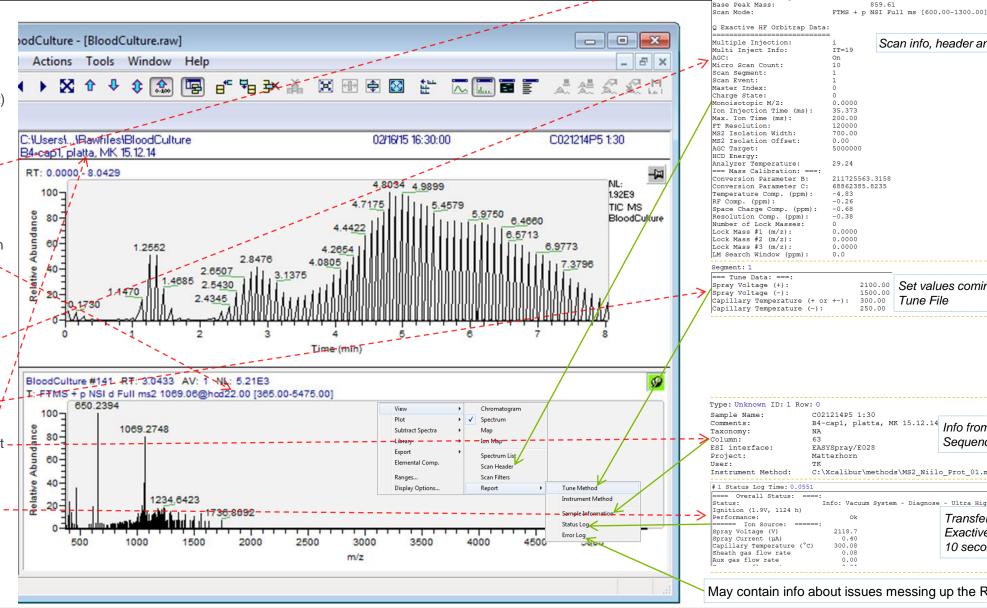
- · on start of an acquisition (resend on instrument restart)
- on arrival of a new scan

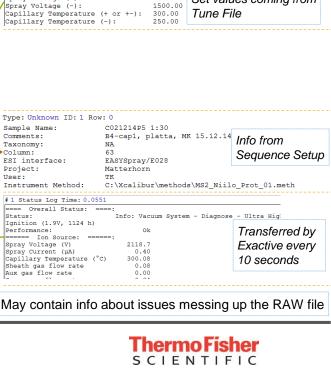
CommonInformation

- common for all instruments
- once per scan
- Also defines the scan filter on top of each spectrum

SpecificInformation

- merges the following
 - Trailer (per scan)
 - TuneData (from the last occurance of the first scan of an acquisition)
 - AcquisitionFixed (from last acquisition stream opening)
 - status log (comes with a scan roughly every 10 seconds)





136388580.00

600.00

1300.00 0.0551

859.61

Scan info, header and trailer

Set values coming from

1263997.90

Total Ion Current:

Scan Start Time (min) Scan Number:

Base Peak Intensity:

Scan Low Mass: Scan High Mass:

Gathering meta data of Exactive Series instruments

Bind to instrument and establish meta data listeners

```
using IMsScan = Thermo.Interfaces.InstrumentAccess_V2.MsScanContainer.IMsScan;
internal void DoJob()
  IMsScanContainer orbitrap = instrument.GetMsScanContainer(0);
  orbitrap_AcquisitionStreamOpening += Orbitrap_AcquisitionStreamOpening;
  orbitrap.MsScanArrived += Orbitrap_MsScanArrived;
  Thread.CurrentThread.Join(60000);
  orbitrap.MsScanArrived -= Orbitrap MsScanArrived;
  orbitrap_AcquisitionStreamOpening -= Orbitrap_AcquisitionStreamOpening;
private void Orbitrap MsScanArrived(object sender, MsScanEventArgs e)
  using (IMsScan scan = (IMsScan) e.GetScan())// caution! You must dispose this, or you block shared memory!
     Console.WriteLine("\n{0:HH:mm:ss,fff} scan with {1} centroids arrived", DateTime.Now, scan.CentroidCount);
     Dump("Common", scan.CommonInformation);
     Dump("Specific", scan.SpecificInformation);
private void Orbitrap AcquisitionStreamOpening(object sender, MsAcquisitionOpeningEventArgs e)
  Console.WriteLine("\n{0:HH:mm:ss,fff} Acquisition stream opening", DateTime.Now);
  Dump("Specific", e.SpecificInformation);
private void Dump(string title, IInfoContainer container)
  Console.WriteLine(title);
  foreach (string key in container.Names)
     string value;
     MsScanInformationSource source = MsScanInformationSource.Unknown;// has to match or must be Unknown
     if (container.TryGetValue(key, out value, ref source))
        string descr = source.ToString();
        descr = descr.Substring(0, Math.Min(11, descr.Length));
        Console.WriteLine(" \{0,-11\}\ \{1,-35\} = \{2\}", descr, key, value);
```

Placing scans (Background)

- Requires API license
- Active userrole dictates values and value ranges of scan properties
- Possible values, ranges and help can be interrogated
- Instrument's execution engine pulls values for the next scan from available sources in following order
 - Custom API Scan
 - Repeating API Scan
 - Method experiment
 - Method global settings
 - Tunefile
 - Calibration file
- A Repeating API scan requires cancellation if been set
- A Custom API scan allows setting a delay time to allow setting the next Custom scan w/o internal scan
- Short before end of custom scan, an event is send by instrument to place further scans
- API scans produce same data as methods (see gathering data)

Placing scans

- Scan properties for a new scan needs to be defined ~20ms before scan is scheduled One or two scans can be already scheduled in the current execution queue.

 Use "Access Id" property to identify the individual scans.
- Defaults of the current tunefile are taken if specific settings are missing in scan definition
- Language for decimals in strings is the independent locale (similar to US)
- Study the examples!

Replacing inclusion and exclusion lists (Background)

- Tables are used to define what precursors are selected or avoided on scan construction
 - one inclusion table shared by all experiments
 - one exclusion table shared by all experiments
 - inclusion and exclusion table don't share same properties / columns
- API license required for using replace mechanism
- Instrument type may have an influence on properties of an inclusion/exclusion table
- Language for decimals in strings is the independent locale

Replacing inclusion and exclusion lists (Hands-on)

- Create a PRM method of one minute, set dynamic exclusion to 0, set top 5 peaks of Tune's current spectrum on inclusion list
 - observe mandatory fields
- Write a handler to replace the inclusion list (e.g. replace with new list containing only two masses)
 - Use missing fields for defaults where possible as thumb rule
- Run method using Tune with rawfile output
- Apply handler and observe values (Access Id!) in QualBrowser
- Check out the example