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Installing L4U Platinum Elite 3.1f on Windows™ Systems

Overview

This installation document has been created to assist in the installation or reinstallation of L4U Platinum Elite 3.1f on Windows computers. It is assumed that no previous of L4U exists on the system. The L4U Platinum Elite software can be downloaded from our website at <http://www.l4u.com> This will install L4U Platinum Elite into the proper folders and create desktop shortcuts to facilitate launching the software.

If you wish to upgrade from L4U Platinum 2.3, please print out and read the *Upgrade to L4U Platinum Elite from Platinum on Windows Systems* document.

The basic procedure for installing L4U Platinum Elite follows these steps:

- A. Download the L4U Platinum Elite software from our website or use the L4U Platinum Elite Install CD
- B. Install the L4U Platinum Elite software, which includes a Blank Data File
 - a. Install L4U Platinum Elite first if L4U Software has performed a Data Conversion or Recon for the Library.
- C. Launch L4U and Enter the new license information
- D. Login to L4U

This document is divided into 2 sections, depending on which version of L4U Platinum Elite you are licensed for:

- For first time users installing Single User, see *Install L4U Platinum Elite Single User Software* below.
- For first time users installing Multi User, see *Install L4U Platinum Elite Software Multi User Software* on Page 10.

Reinstalling L4U Platinum Elite

- If you are reinstalling L4U Platinum Elite Single User, please refer to page 6.
- If you are reinstalling L4U Platinum Elite Multi User, please refer to page 15.

Install L4U Platinum Elite Single User Software

Install L4U Software from Internet Download or from the L4U Platinum Elite Installation CD. To download the L4U Platinum Elite software from the L4U Library Software Website, then follow these steps:

1. Go to or click <http://www.l4u.com>
2. Click *Client Corner*

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3. Enter your L4U Customer ID # and your Password
(If you do not have a Password, please send an email to Admin@L4U.com requesting a Client Corner Password. In this email, include your name, email address, school name, and client code)
4. Click *Login*
5. Go to *Downloads*
6. Download and Save the *L4U Platinum Elite Single User* software
 - Install L4U Platinum Elite Single User first if L4U Software has performed a Data Conversion or Recon for the Library. Please refer to the *Data File* section below.

Install L4U Platinum Elite Single User Program

1. If you have the L4U Platinum Elite Installation CD, please skip to Step 3
2. Double click on the downloaded *L4U Platinum Elite Single User Installer*. Skip to Step 6
3. Insert the *L4U Platinum Elite Installation CD* into your computer
4. Open the CD from *My Computer*
5. Click the *Single User Installer* button
6. The Installer preparation screen will display
7. Click *Next* when the L4U Platinum Elite Introduction Screen displays
8. The L4U Platinum Elite License Agreement will display
 - a. Read the Agreement and if acceptable, select *I accept the terms of the License Agreement* and click *Next*
9. Click *Install*
10. Click *Done* to exit the installer when finished
 - a. If the *Windows Fonts* folder has remained open, simply close it once you have exited the installer
11. Restart your computer so that the L4U font will be available for use

The L4U Platinum Elite Single User software is now installed on the system. The default installation path is *HD:\L4U Program Files\L4U Elite\Single* (where HD is the letter of the Windows Hard Drive).

Data File

The Platinum Elite 3.1f installer includes a blank data file. A blank data file is only required if **all** of the Library items are to be entered manually or via a MARC record import. If this is the case, please proceed to the next section, *Launch L4U Platinum Elite Single User*.

If L4U Software has performed a Data Conversion or Recon for the library, please see the documentation supplied with your Data Conversion or Recon Data for instructions on how to install the converted data file.

Best Practice for the Single User L4U Data File is to install it to the Database folder, which is in the same location that L4U is installed to. By default, this is at *HD:\L4U Program Files\L4U*

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Elite\Single\Database (where HD is the letter of the Windows Hard Drive) for Single User Installations.

Remember; install the L4U Platinum Elite software first.

Launch L4U Platinum Elite Single User

Once the Data file has been installed, start the L4U Platinum Elite program:

1. Double Click on the *Shortcut* that was installed on the desktop or Select L4U Platinum Elite Single User from the *Windows Start Menu*
2. Click *Administrator* from the User List
3. Type **Items** in the *Password* field
4. The *Open* box will display
5. Locate and Select the Data file
6. Click *Open*

Licensing Information

L4U Platinum Elite will ask for the License Information the first time a Blank Data file is opened. L4U Library Software will enter the License Information for you if L4U Software has performed a Data Conversion or Recon for your library. If so, please proceed to *Step 1 of Login to L4U Platinum Elite Single User* on page 4.

You will have received the License Number with your L4U Platinum Elite Software Package. If you cannot locate the paperwork, this license information can be obtained by using the *Print Platinum Elite License* function on *Client Corner*. Please refer to *Access Client Corner* below. If the license information cannot be located, contact L4U Library Software at (250) 712-4644 to obtain the correct license number for your location.

To Access Client Corner

1. In your Internet browser address bar, type in this address: <http://www.l4u.com>
 2. Click *Client Corner*
 3. Enter your L4U Customer ID # and your Password
(If you do not have a Password, please send an email to Admin@L4U.com requesting a Client Corner Password. In this email, include your name, email address, school name, and client code)
 4. Click *Login*
 5. Click *Your Account*
 6. Click *Print Platinum Elite License*
-
1. Back in L4U Platinum Elite, Click *OK* when prompted to Enter your License Number & Activation Code
 2. Enter the necessary *Library Profile* information

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- a. Customer ID, Library Name, Address, Telephone Number, License Number & Activation Code should be entered
- b. Leave *Replace Library Name with Location* unchecked
3. Click *Activate*
4. Click *Ok* when Activation is successful
5. If Activation fails, please contact L4U Support for an Authentication code
6. Click *Save* to exit the Library Profile screen
7. Click *Done*

Login to L4U Platinum Elite Single User

Platinum Elite 3.1f requires all L4U Administrative Users to Log In when accessing the L4U Application.

1. *Cont'd from Launch L4U Platinum Elite Single User on page 3*
2. You will need to choose a Client Code and PIN to login
 - Use **items** for Client Code and **items** for the PIN
3. Click *Verify*
4. Click *Details* when an Alert displays stating this is a *Superuser* password
 - More information is available below
5. Click *OK*
6. *Homeroom Management* window appears
7. L4U Platinum Elite is now ready for use

No Clients or Homerooms exist if this is a Blank Data File or a Conversion. Enter or import Clients and then revisit Homerooms to set the Access Level for the Homeroom that needs Administration privileges.

Information on these topics can be found here:

- *Client Entry, Manual:* Please refer to Chapter 4 of the *L4U Users Manual*
- *Client Entry, Importing Class Lists:* Please refer to *Import Client Data* in the *Importing & Exporting* chapter of the *L4U Users Manual*
- *Homerooms:* Please refer to Chapter 4 of the *L4U Users Manual*
- *Access Levels:* Please refer to *Creating Access Levels* in the *Passwords* chapter of the *L4U Users Manual*

The *L4U Platinum Elite 3.1 User Manual* can be found in L4U's Client Corner.

Decide who will need Administrative Access to L4U once Patrons are entered. This is usually the librarian (and any trusted assistants). Create a Homeroom (e.g.: LIBADMIN, etc.) and assign this Homeroom an Access Level Name using the old Second Level Password. For example,

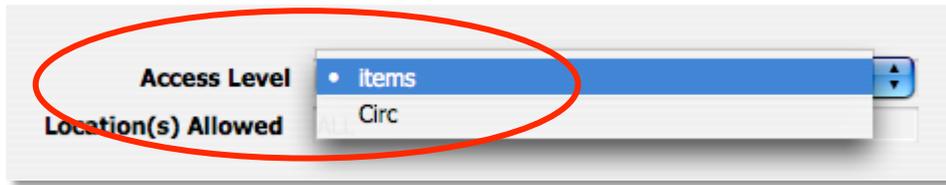
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In the Client File, assign a PIN to the librarian and ensure this user(s) belong to this new Homeroom. This user would use the combination of their Client Code and PIN to Log In with in the future, instead of the *Superuser* Account.

The installation process is complete.

Welcome to L4U!

What Next?

Next step is to read the *L4U Quick Start Guide* that is included with your documentation set. It is also available in L4U's Client Corner, along with the rest of the L4U manuals.

Then, review your training schedule. Please contact your district librarian for your L4U Training schedule or, if one does not exist, please contact L4U's Training Department to review your training options. The phone number is in the footer of this document or feel free to send an inquiry to training@L4U.com.

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Re-Installing L4U Platinum Elite 3.1f Single User on Windows™ Systems

Reinstalling L4U Platinum Elite is straightforward and the basic procedure is:

- A. Backup the Current Data File
- B. Export Custom Pop Up Lists, if any
- C. Uninstall the old L4U Platinum Elite
- D. Install L4U Platinum Elite
- E. Move the Current Data File back to the correct location
- F. Launch L4U & Select the Current Data File
- G. Login to L4U & Verify the Data File
- H. Import Custom Pop Up Lists, if any
- I. Reset L4U Automatic Backup, if necessary

Locate your Current Datafile

To identify the name and location of a Single User Current Data File:

1. Make sure that L4U Platinum Elite Single User is running
2. From *Help* in the menu bar, select *About L4U* (e.g.: *Help > About L4U*)
3. Click the *Data file Information* tab
4. Fourth field down, Path to Datafile indicates the name of the current data file and where it is located.
 - L4U data files end with the *.4DD* suffix.
 - Make note of the path and the name of the Current Datafile
 - The default location of the current datafile is: *C:/L4U Program Files/L4U Elite/Single/Database/xxx.4DD*, where *xxx.4DD* is the name of your current datafile.
5. Click *Done*
6. If you need to Export the *Pop Up Lists*, proceed to the next section, otherwise Select *File > Quit*

Pop Up Lists - Export

Pop Up Lists are used in different parts of the L4U program. A pop up list appears any time a field that uses a pop up list is clicked on or tabbed into. *Status* and *Condition* of an item, *Client Type* and *Excluded Keywords* use pop up lists. You will want to export them before upgrading if you have modified the items in the pop up list. The lists are imported after the upgrade process has finished. Otherwise, you can skip this step. Please refer to the L4U User Manual for more information on Pop Up Lists. To Export the Pop Up Lists:

1. *File > Preferences*
2. Click *Admin*
3. Select the *Inventory & Misc.* tab

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4. Under *List Control*:, Click *Export Lists*
5. A Confirmation screen appears, Click *Yes*
6. You are asked to name the export file, Click *Proceed*
 - Enter the file name and the location to save to
7. Click *Save*
8. A Confirmation that all lists have exported appears, Click *OK*
9. Click *Save to Exit Preferences*
10. Select *File > Quit* to exit L4U

Back Up the Current Datafile Before Upgrade

Before reinstalling, ensure you have a current backup of the datafile. You can use L4U's built in backup function or manually copy the datafile to another location. Please refer to *Manual Backup* in the Backup/Restore chapter of the *L4U Users Manual* to use L4U's built-in backup function.

Alternatively, you can always navigate to the location of the Current Datafile and manually copy the Current Datafile to the Desktop. To do so:

1. Follow Steps 1 to 6 above in *Locate your Current Datafile*
2. Using *Windows Explorer*, navigate to the location indicated in step 4
3. Copy the L4U data file (.4DD or 4DD File type) and the corresponding 4DINDEX File to an archive location
 - a. *Example*: If the data file has the name L4U_Platinum.4DD, the 4DINDEX file will have the name L4U_Platinum.4DINDEX
4. *Paste* the files into the desired location

Uninstall the Previous Version of L4U Platinum Elite

L4U Platinum Elite has an Uninstall program to assist with this task.

1. From the Windows Start button, select *Uninstall L4U Platinum Elite Single User*
 - The location is *L4U Platinum Elite > Single User > Advanced > Uninstall L4U Platinum Elite Single User*
2. Follow the onscreen directions
3. Click *Done* if prompted when the Uninstall has finished

The *L4U Platinum Elite Single User* folder will still exist after the Uninstall program has finished. Rename the folder to *Platinum Elite Single Old* to differentiate it from the new L4U Platinum Single software that will be installed in the next section. The *Platinum Elite Single Old* folder can be safely deleted after the new program has been installed and verified as complete. The default location for this folder is: *C:\L4U Program Files\L4U Elite*.

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Install L4U Platinum Elite

Follow the directions on page 1 *Install L4U Platinum Elite Single User Software*, to install the L4U software.

Move the Data File to the Reinstalled L4U Platinum Elite Single Folder

The current data file must be copied from the archive location to the new installation folder of L4U Platinum Elite Single User. The default location the current data file must be moved to is:

C:\Program Files\L4U Elite\Single\Database where C is the letter of the Windows Hard Drive.

1. Copy the L4U data file (.4DD or 4DD File type) and the corresponding 4DINDEX File from the Archive Location
 - i.e.: Highlight these two files, right-click, and select *Copy*
2. Double click *My Computer* on your desktop or Select *Start > Computer* from the *Windows Start Menu*.
3. Double click the *C: Drive* (or the drive that L4U resides on)
4. Double click *L4U Program Files*
5. Double click *L4U Elite*
6. Double click *Single*
7. Double click *Database*
8. Right Click in an empty area of the *Database* folder and select *Paste*.

Launch L4U Platinum Elite Single User and Select the Data File

Once the Data File has been moved to the correct folder, launch the L4U Platinum Elite program:

1. Double Click on the *Shortcut* that was installed on the desktop or Select *L4U Platinum Elite Single User* from the *Windows Start Menu*.
2. Immediately after Launching L4U, Hold down the *Alt* key on the keyboard until an *Option* dialog appears
3. Click *Select another data file*
4. Click *Continue*
5. Locate and select the current data file that was moved into the *HD:\Program Files\L4U Elite\Single\Database* (where HD is the letter of the Windows Hard Drive).
6. Click *Open*
7. Select/Enter the librarian's usual login credentials. For example:
 - a. Select *Administrator* from the *User Identification List*
 - b. In the *Password* field, enter *Items*
 - i. This password is case sensitive
 - c. Click *Connect*
 - d. Enter the *Librarian Client Code* and *PIN* and login as normal

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Verify with the librarian that this is the correct current datafile. If Pop Up Lists were exported, then proceed to the next section, otherwise the upgrade process is complete.

Pop Up Lists - Import

To Import the Pop Up Lists:

1. *File > Preferences*
2. Click *Admin*
3. Select the *Inventory & Misc.* tab
4. Under *List Control:*, Click *Import Lists*
5. A Confirmation screen appears, Click *OK*
6. You are asked to select the export file, Click *Proceed*
7. Locate the file and Click *Open*
 - A scrolling screen will display the files as they are imported
8. A Confirmation that all lists have imported appears, Click *OK*
9. Click *Save* to Exit Preferences

Reset the L4U Automatic Backup

This step is only necessary if you use the Automatic Backup feature of L4U Elite. A reset is necessary as the software was reinstalled.

It is easy to reset the backup – just recreate the Automatic Backup. Please refer to the *Automated Backup* section of the *Backup/Resort* chapter in the L4U User Manual for more information on how to perform an Automated Backup.

The reinstallation is complete.

Thank you for your continued support of L4U!



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Install L4U Platinum Elite Multi User Software on Windows™ Systems

After reading the *Overview* on page 1, install the L4U Software from Internet Download or from the L4U Platinum Elite Installation CD. To download the L4U Platinum Elite software from the L4U Library Software Website, then follow these steps:

1. Go to or click <http://www.l4u.com>
2. Click *Client Corner*
3. Enter your L4U Customer ID # and your Password
(If you do not have a Password, please send an email to Admin@L4U.com requesting a Client Corner Password. In this email, include your name, email address, school name, and client code)
4. Click *Login*
5. Go to *Downloads*
6. Download and Save the *L4U Platinum Elite Server* software and the *L4U Platinum Elite Admin Utility* software to your desktop
 - Install L4U Platinum Elite Server first if L4U Software has performed a Data Conversion or Recon for the Library. Please refer to the *Data File* section on page 11.

Install L4U Platinum Elite Server Program

Install the L4U Server software on the server computer.

1. If you have the L4U Platinum Elite Installation CD, please skip to Step 3
2. Double click on the downloaded *L4U Platinum Elite Server Installer*. Skip to Step 6
3. Insert the *L4U Platinum Elite Installation CD* into your computer
4. Open the CD from *My Computer*
5. Click the *Server Installer* button
6. The Installer preparation screen will display.
7. Click *Next* when the L4U Platinum Elite Introduction Screen displays.
8. The L4U Platinum Elite License Agreement will display. Read the Agreement and if acceptable, select *I accept the terms of the License Agreement* and click *Next*
9. Click *Install*
10. L4U Platinum Elite Server will now install. Please be patient.
11. Click *Done* to exit the installer when finished.

The default installation path is *HD:\L4U Program Files\L4UPlatinum\Server*, where HD: is the letter of the Windows Hard Drive. The L4U Platinum Elite Server software is now installed on the system and is ready for the Data file.

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Data File

The Platinum Elite 3.1f installer includes a blank data file. A blank data file is only required if **all** of the Library items are to be entered manually or via a MARC record import. If this is the case, please proceed to the next section, *Launch L4U Platinum Elite Server*.

If L4U Software has performed a Data Conversion or Recon for the library, please see the documentation supplied with your Data Conversion or Recon Data for instructions on how to install the converted data file.

Best Practice for the Multi User Data File is to install it to the Database folder, which is in the same location that L4U is installed to. The default location for Multi User installations is *HD:\L4U Program Files\L4U Elite\Server\Server Database* (where HD is the letter of the Windows Hard Drive on the L4U Server computer).

Remember, install the L4U Platinum Elite Server software first.

Launch L4U Platinum Elite Server

Once the Data File has been installed, start the L4U Platinum Elite program:

1. Launch *L4U Platinum Elite Server* via the shortcut that was installed on the desktop or via the *Windows Start Button > All Programs > L4U Platinum Elite > Server > L4U Platinum Elite 3.1 Server*
2. The *Open* box will display
3. Locate and Select the Data file
4. Click *Open*
5. The L4U Platinum Elite Server software will open



Warning: Do Not make any adjustments to any of the properties in the L4U Platinum Elite Server software unless specifically directed to do so by either the L4U Platinum Elite manual or by the Support Staff at L4U Library Software.

From this point on, the L4U Server Software will remember the Data file it last opened unless that data file is moved to another location or renamed. This is known as the *Current Data file*.

Install L4U Platinum Elite Admin Utility (AU) Program

Install the L4U Platinum Elite Admin Utility on the computers that need the Admin Utility.

1. If you have the L4U Platinum Elite Installation CD, please skip to Step 3.
2. Double click on the *L4U Platinum Elite Client Installer*. Skip to Step 6.
3. Insert the *L4U Platinum Elite Installation CD* into your computer.
4. Open the CD from *My Computer*
5. Click the *Admin Utility Installer* button.
6. The Installer preparation screen will display.

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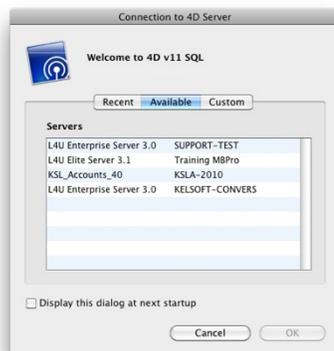
7. Click *Next* when the L4U Platinum Elite Introduction Screen displays.
8. The L4U Platinum Elite License Agreement will display. Read the Agreement and if acceptable, select *I accept the terms of the License Agreement* and click *Next*.
9. Click *Next* and then *Install*.
10. L4U Platinum Elite Admin Utility will now install. Please be patient.
11. You will see a message *Activating L4U Font*
12. Click *Done* to exit the installer.
13. If the Windows Fonts folder has remained open, simply close it once you have exited the installer.
14. Restart your computer so that the L4U font will be available for use.

The L4U Platinum Elite Admin Utility software is now installed on the system and is ready to connect to the L4U Platinum Elite Server. Repeat this installation on each Client Computer. The default installation path is *HD:\L4U Program Files\L4U Elite\AU* where HD is the letter of the Windows Hard Drive.

Launch L4U Platinum Elite Admin Utility

Move to one of the machines that the L4U Platinum Elite Admin Utility Software was installed on.

1. Launch the *L4U Platinum Elite Admin Utility* via the shortcut that was installed on the desktop or via *Windows Start Button > All Programs > L4U Platinum Elite > AU > L4U Platinum Elite 3.1 Admin Utility*
2. On the *Available* tab, Select your *L4U Platinum Elite Server*



3. If the Click *OK*
4. Select *Administrator* from the User List
5. Type **Items** in the Password field
6. Click *Connect*

Licensing Information

L4U Platinum Elite will ask for the License Information the first time a Blank Data file is opened. L4U Library Software will enter the License Information for you if L4U Software has

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performed a Data Conversion or Recon for your library. If so, please proceed to *Step 1 of Login to L4U Platinum Elite Server* below.

You will have received the License Number with your L4U Platinum Elite Software Package. If you cannot locate the paperwork, this license information can be obtained by using the *Print Platinum Elite License* function on *Client Corner*. Please refer to *Access Client Corner* below. If the license information cannot be located, contact L4U Library Software at (250) 712-4644 to obtain the correct license number for your location.

To Access Client Corner

1. In your Internet browser address bar, type in this address: <http://www.l4u.com>
2. Click *Client Corner*
3. Enter your L4U Customer ID # and your Password
(If you do not have a Password, please send an email to Admin@L4U.com requesting a Client Corner Password. In this email, include your name, email address, school name, and client code)
4. Click *Login*
5. Click *Your Account*
6. Click *Print Platinum Elite License*

7. Back in L4U Platinum Elite, Click *OK* when prompted to Enter your License Number & Activation Code
8. Enter the necessary *Library Profile* information
 - a. Customer ID, Library Name, Address, Telephone Number, License Number & Activation Code should be entered
 - b. Leave *Replace Library Name with Location* unchecked
9. Click *Activate*
10. Click *Ok* when Activation is successful
11. If Activation fails, please contact L4U Support for an Authentication code
12. Click *Save* to exit the Library Profile screen
13. Click *Done*

Login to L4U Platinum Elite Server

After the License Information has been entered, continue to login to the L4U Server.

1. Continued from *Step 6 of Launch L4U Platinum Elite Admin Utility* from the previous page
2. You will need to choose a Client Code and PIN to login
 - Use **items** for Client Code and **items** for the PIN
3. Click *Details* when an Alert displays stating this is a *Superuser* password
4. *Homeroom Management* window appears
5. L4U Platinum Elite is now ready for use

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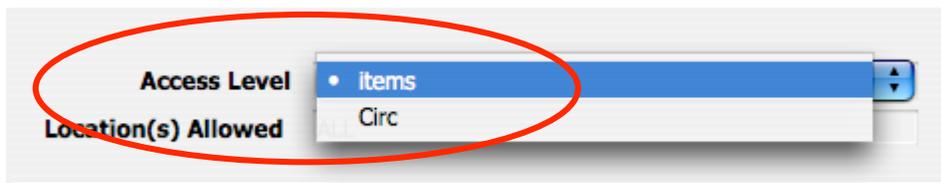
No Clients or Homerooms exist if this is a Blank Data File or a Conversion. Enter or import Clients and then revisit Homerooms to set the Access Level for the Homeroom that needs Administration privileges.

Information on these topics can be found here:

- *Client Entry, Manual*: Please refer to Chapter 4 of the *L4U Users Manual*
- *Client Entry, Importing Class Lists*: Please refer to *Import Client Data* in the *Importing & Exporting* chapter of the *L4U Users Manual*
- *Homerooms*: Please refer to Chapter 4 of the *L4U Users Manual*
- *Access Levels*: Please refer to *Creating Access Levels* in the *Passwords* chapter of the *L4U Users Manual*

The *L4U Platinum Elite 3.1 User Manual* can be found in L4U's Client Corner.

Decide who will need Administrative Access to L4U once Patrons are entered. This is usually the librarian (and any trusted assistants). Create a Homeroom (e.g.: LIBADMIN, etc.) and assign this Homeroom an Access Level Name using the old Second Level Password. For example,



In the Client File, assign a PIN to the librarian and ensure this user(s) belong to this new Homeroom. This user would use the combination of their Client Code and PIN to Log In with in the future, instead of the *Superuser* Account.

The installation process is complete.

Welcome to L4U!

What Next?

Next step is to read the *L4U Quick Start Guide* that is included with your documentation set. It is also available in L4U's Client Corner, along with the rest of the L4U manuals.

Then, review your training schedule. Please contact your district librarian for your L4U Training schedule or, if one does not exist, please contact L4U's Training Department to review your training options. The phone number is in the footer of this document or feel free to send an inquiry to training@L4U.com.



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Re-Installing L4U Platinum Elite 3.1f Multi User on Windows™ Systems

Reinstalling L4U Platinum Elite Server is relatively easy as is the Admin Utility, which is covered on page 18. It is usually not necessary to reinstall the Admin Utility as the Admin Utility from Elite 3.1c can be used. Ensure there are no users logged in before starting the reinstall. The basic procedure is:

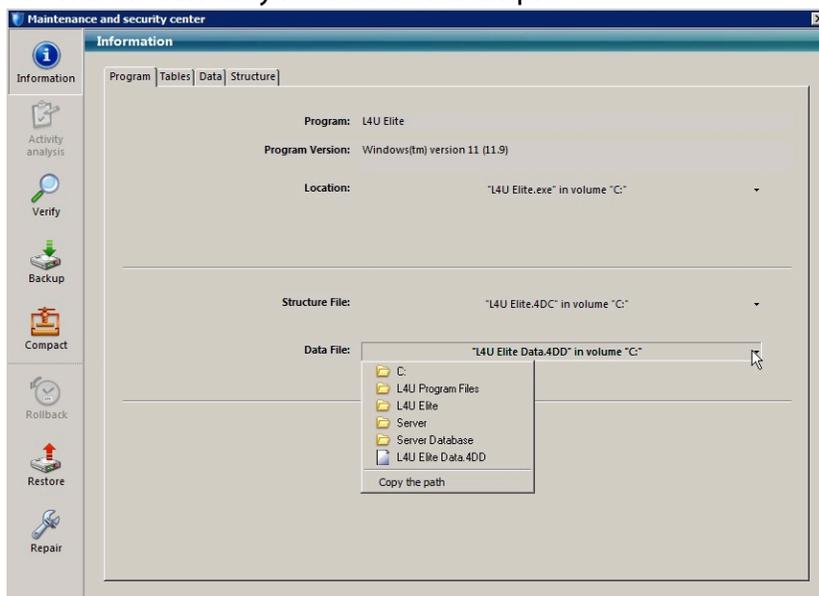
- A. Locate the Current Datafile
- B. Make note of L4U Automated Backup settings, if used
- C. Export Pop Up Lists, if necessary
- D. Backup the Current Data File
- E. Uninstall the Old L4U Platinum Elite Server
- F. Install L4U Platinum Elite Server
- G. Move the Current Data File back to the correct location
- H. Launch L4U Server & Select the Current Data File
- I. Login to L4U via the Admin Utility & Verify the Data File

Locate your Current Datafile

To identify the name and location of a Multi User Current Data File:

1. At the L4U Elite Server computer with the L4U Elite Server program running, Go *Help > Maintenance & Security Center*
2. Make note of the path and the Data File name listed.

The default location of the Current Datafile is at *C:/L4U Program Files/L4U Elite/Server/Server Database/xxx.4DD* where *C:/* is the current volume where L4U Server software is currently located. For example:



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3. Close the *Maintenance & Security Center* window
4. Make note of the L4U Automated Backup settings, if used
Specifically, the where, when & what settings. Please refer to *Automated Backup* in the Backup/Restore chapter of the *L4U Users Manual* for more information.
5. If you need to Export the *Pop Up Lists*, proceed to the next section otherwise Select *File > Quit*

Pop Up Lists

Pop Up Lists are used in different parts of the L4U program. A pop up list appears any time a field that uses a pop up list is clicked on or tabbed into. *Status* and *Condition* of an item, *Client Type* and *Excluded Keywords* use pop up lists. You will want to export them before upgrading if you have modified the items in the pop up list. The lists are imported after the upgrade process has finished. Otherwise, you can skip this step. Please refer to the L4U User Manual for more information on Pop Up Lists. To Export the Pop Up Lists:

1. Launch the L4U Elite Admin Utility from any L4U workstation
2. *File > Preferences*
3. Click *Admin*
4. Select the *Inventory & Misc.* tab
5. Under *List Control*:, Click *Export Lists*
6. A Confirmation screen appears, Click *Yes*
7. You are asked to name the export file, Click *Proceed*
8. Enter the file name and the location to save to
9. Click *Save*
10. A Confirmation that all lists have exported appears, Click *OK*
11. Click *Save to Exit Preferences*
12. Quit the L4U Elite Admin Utility
13. Quit the L4U Elite Server

Back Up Existing Data Before Upgrade

We always recommend that you ensure you have a current backup before any upgrade. If you're not sure, please refer to *Manual Backup* in the Backup/Restore chapter of the *L4U Users Manual* to perform a backup.

Alternatively, you can always navigate to the location of the Current Datafile and manually copy the Current Datafile to the desktop. You must quit L4U Platinum Elite first!

Uninstall L4U Platinum Elite

L4U Platinum Elite has an Uninstall program to assist with this task.

1. From the Windows Start button, select *Uninstall L4U Platinum Elite 3.1 Server*

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- The location is *L4U Platinum Elite > Server > Advanced > Uninstall L4U Platinum Elite 3.1 Server*
2. Follow the onscreen directions
 3. Click *Done* when the Uninstall has finished

The *L4U Elite Server* folder will still exist after the Uninstall program has finished. Rename the folder to *Server Old* to differentiate it from the new L4U Elite Server software that will be installed in the next section. The *Server Old* folder can be safely deleted after the new program has been installed and verified as complete. The default location for this folder is: *C:/L4U Program Files/L4U Elite*.

Install L4U Platinum Elite Server

L4U Platinum Elite Server software is available from L4U's Client Corner or via the L4U Platinum Elite Install CD. Launch the Server Installer and follow the onscreen directions.

Restore the Current Datafile

How the Current Datafile is restored depends on how it was backed up.

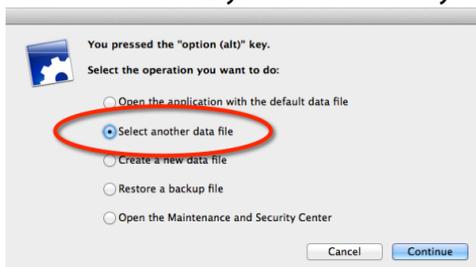
If L4U was used to backup the current datafile, please refer to *Restoring a Backup* in Backup/Restore chapter of the L4U Users Manual.

If the current datafile was manually copied to another location, then copy the datafile back to the correct location. The default location for the current datafile is: *C:/L4U Program Files/L4U Elite/Server/Server Database*

Launch L4U Platinum Elite Server

After the Current Datafile has been restored to the default location, Launch L4U and select it.

1. Launch L4U Platinum Elite Server via the desktop shortcut or the Windows Start Menu AND immediately hold the *Alt* key down until L4U presents the following dialog box



- a. This will allow you to select the Current Datafile as defined on page 15, *Locate your Current Datafile*
 - b. *Do not click Create*
2. Click *Select another data file* and Click *Continue*

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3. Click *Open* when the correct datafile is located
1. The *4D Server Administration* window appears

Launch L4U Platinum Elite Admin Utility

If L4U Admin Utility is not on the desired computer, the software is available from L4U's Client Corner or via the L4U Platinum Elite Install CD. Launch the L4U Elite Admin Utility Installer and follow the onscreen directions. After that is complete, proceed to Step 1 below.

If the L4U Admin Utility is already installed on the desired computer, launch L4U Admin Utility and connect to the L4U Platinum Elite Server. If a new version of the Admin Utility is needed, the L4U Platinum Elite Server will download the new Admin Utility upon first connect.

1. Launch *L4U Platinum Elite Admin Utility* via the shortcut that was installed on the desktop or via *Windows Start Button > All Programs > L4U Platinum Elite > AU > L4U Platinum Elite 3.1 Admin Utility*
2. Select/Enter the librarian's usual login credentials. For example:
 - a. Select *Administrator* from the User Identification List
 - b. In the Password field, enter *Items*
 - i. This password is case sensitive
 - c. Click *Connect*
 - d. Enter the Librarian Client Code and PIN and login as normal

Verify with the librarian that this is the correct current datafile. If Pop Up Lists were exported, then proceed to the next section, otherwise the upgrade process is complete.

Pop Up Lists - Import

To Import the Pop Up Lists:

10. *File > Preferences*
11. Click *Admin*
12. Select the *Inventory & Misc.* tab
13. Under *List Control*:, Click *Import Lists*
14. A Confirmation screen appears, Click *OK*
15. You are asked to select the export file, Click *Proceed*
16. Locate the file and Click *Open*
 - A scrolling screen will display the files as they are imported
17. A Confirmation that all lists have imported appears, Click *OK*
18. Click *Save* to Exit Preferences

The reinstallation is complete.



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Thank you for your continued support of L4U!

Revision History:

*March 4, 2013 – Pop Up Lists & Backup included
February 28, 2013 – 3.1f and updates from previous versions*

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