



# ***Library Management Made Easy!***

## **Upgrade to L4U Platinum Elite from Platinum on Windows™ Systems**

### ***Overview***

This installation document has been created to assist in the upgrade to L4U Platinum Elite Single User from Platinum 2.3 on Windows Computers. Please refer to page 7 if you are upgrading a Multi User system. This document assumes that L4U Platinum 2.3 is installed.

L4U Platinum will remain on your computer and can be accessed at any time. In other words, L4U Platinum will be a snapshot of your collection at the time of the upgrade to Elite. However, ensure L4U Platinum Elite is used going forward and not the old copy of L4U.

### ***Prerequisites***

To Upgrade to Platinum Elite from Platinum you must have

- Upgraded to *Platinum 2.3.x*
- A *Login Password* with full access to L4U (i.e.: not a helper)
  - Please refer to page 15 of the L4U Platinum 2.3 User Manual for more information on Login Passwords
- Your Platinum Elite License Number and Activation Code
- Your L4U Customer ID #
- Platinum Elite software installer

The basic procedure for upgrading to L4U Platinum Elite follows these steps (which are explained in detail on the following pages):

1. Before upgrading to Elite, take note of your Custom Label & Report Template settings/dimensions so you can re-create them in Elite
2. Make note of the Current Data file's location
3. Backup Existing Data
4. Obtain L4U Platinum Elite
5. Install L4U Platinum Elite
6. Run the L4U Elite Upgrade Utility
7. Login to L4U Elite

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## **L4U Platinum *Single User* Upgrade to Platinum Elite - Windows**

### ***Custom Report & Label***

Due to the changes in the L4U Engine, custom report and label templates from L4U Platinum do not work in L4U Elite. L4U Library Software apologizes for any inconvenience this may cause.

### ***Locate your Current Datafile***

You may need this information later in the upgrade process. To identify the name and location of a Single User Current Data File:

1. Make sure that L4U Platinum Single User is running
2. From the *Help Menu* >select *About L4U* (e.g.: *Help* > *About L4U*)
3. Click the *Data file Information* tab
4. Fourth field down indicates the current data file and where it is located
  - In Windows, all L4U data files end with the *.4DD* suffix
5. Make note of the path to the datafile
6. Click *Done*
7. Select *File* > *Quit*

*Example:* The default location of the current datafile is: C:\L4U Program Files\L4UPlatinum\2.3.4\Database\xxx.4DD, where xxx.4DD is the name of your current datafile.

### ***Back Up Existing Data Before Upgrade***

The L4U Elite Upgrade Utility doesn't modify the original L4U Platinum data.

However, before performing this upgrade, we always recommend that you ensure you have a current backup. If you're not sure, please refer to Manual Backup on page 347 of the *Platinum User Manual v2.3* to perform a backup.

### ***Install L4U Platinum Elite***

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

### ***Run the L4U Elite Upgrade Utility***

After L4U Platinum Elite is installed, your L4U Platinum data needs to be transferred to L4U Platinum Elite. Follow these steps to do so:

1. Launch the *L4U Elite Upgrade Utility*
  - The default location is at C:\L4U Program Files\L4U Elite\Single\L4U Elite Upgrade Utility where C: is the drive where L4U Elite is located

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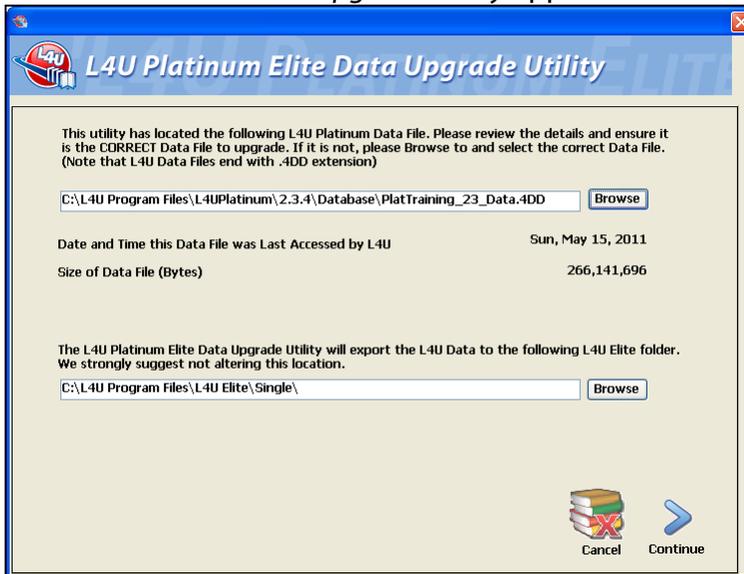
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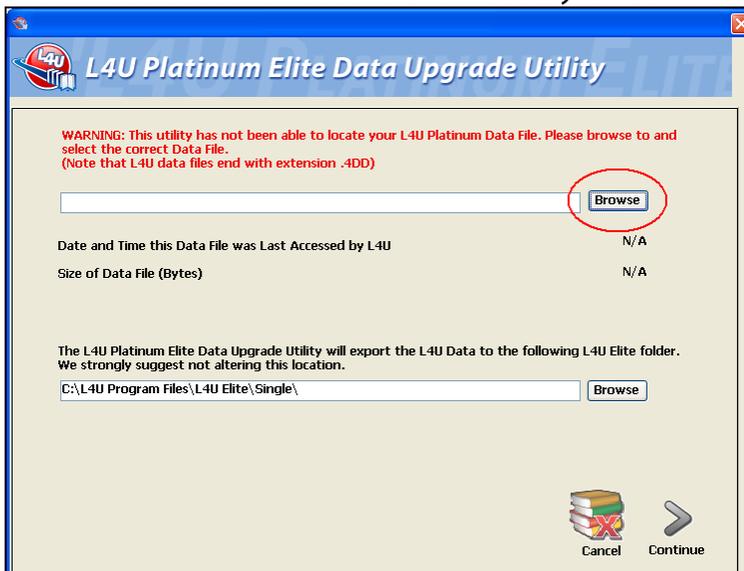
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2. Select *Administrator* from the User Identification List
3. In the Password field, enter *Items*
  - This password is case sensitive
4. Click *Connect*
5. The *Platinum Elite Data Upgrade Utility* appears



Review the location of the source datafile. This will be the same as the Current Datafile in Step 4 in *Locate your Current Datafile* on page 2

6. If the Upgrade Utility cannot locate the Current Datafile, Click *Browse* and navigate to the correct location. Please refer to *Locate your Current Datafile* on page 2.



The default datafile location for Platinum 2.3 is *C:\L4U Program Files\L4UPlatinum\Single\Database*

or for Platinum 2.3.4 it is at *C:\L4U Program Files\L4UPlatinum\2.3.4\Database*

7. Click *Continue*

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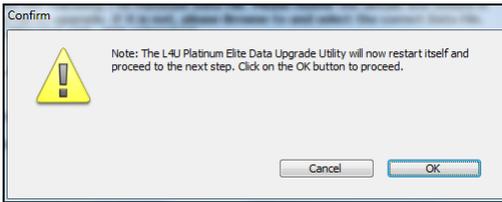
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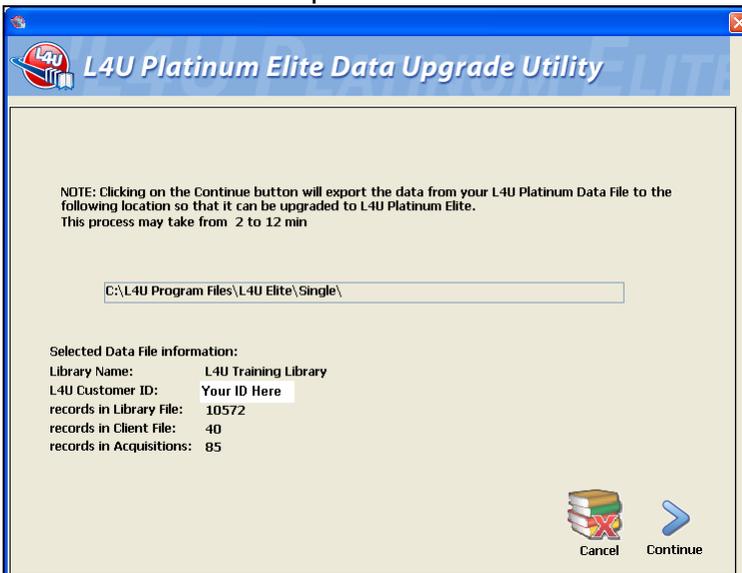


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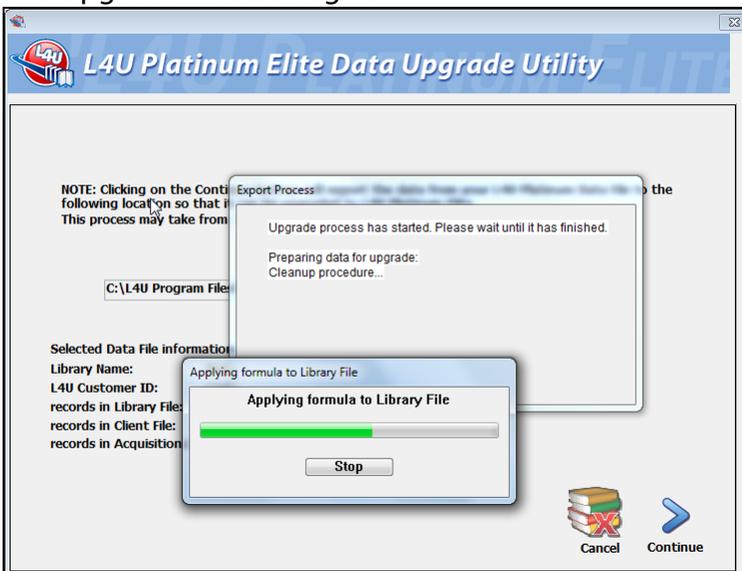
8. Click *OK* at the confirmation Alert



9. Log In Again. Click *Administrator*  
10. In the Password field, enter *Items*
- This password is case sensitive
11. Click *Connect*  
12. Click *Continue* at the export confirmation screen



13. The Upgrade Process begins



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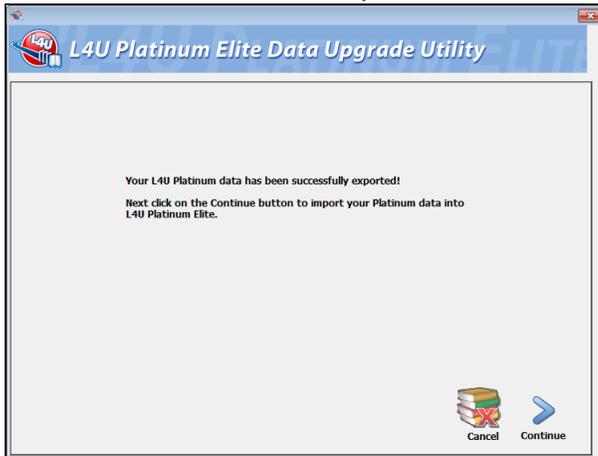
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14. Click *Continue* when the export Process has finished



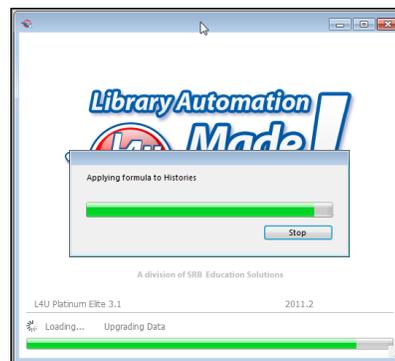
15. After L4U has restarted, Select *Administrator* from the User Identification List

16. In the Password field, enter *Items*

- This password is case sensitive

17. Click *Connect*

18. The Import Process begins



19. Click *OK* when prompted to Enter your License Number & Activation Code

20. Enter the necessary *Library Profile* information

- Customer ID, Library Name, Address, Telephone Number, License Number & Activation Code should be entered
- Leave *Replace Library Name with Location* unchecked

21. Click *Activate*

22. Click *OK* when Activation is successful

- If Activation fails, please contact L4U Support for an Authentication code

23. Click *Save* to exit the Library Profile screen

24. Enter your usual Librarian Client Code and PIN and login as normal

**Please proceed to *After Upgrading* on page 13**



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## L4U Platinum *Multi-User* Upgrade to Platinum Elite – Windows

Please review page 1 before proceeding with the following steps!

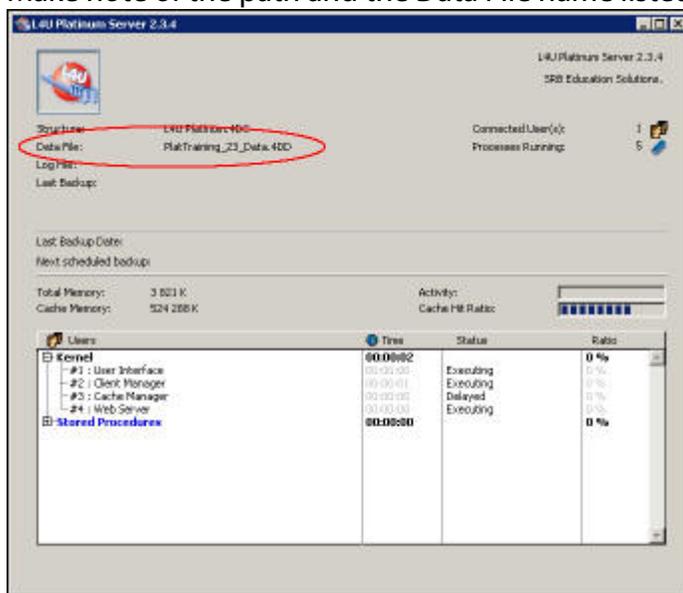
### Custom Report & Label

Due to the changes in the L4U Engine, custom report and label templates from L4U Platinum do not work in L4U Elite. L4U Library Software apologizes for any inconvenience this may cause.

### Locate your Current Datafile

You may need this information later in the upgrade process. To identify the name and location of a Multi User Current Data File:

1. At the L4U Platinum Server computer and the L4U Server program running, view the L4U Server Main Window
2. Make note of the path and the Data File name listed



3. Select *File > Quit*

*Example:* If the full path name is not indicated (as in the above illustration), then the Current Datafile is at *C:\L4U Program Files\L4UPlatinum\2.3.4Server\Server Database\*, where C: is current volume where L4U Server software is currently located.

### Back Up Existing Data Before Upgrade

The L4U Elite Upgrade Utility doesn't modify the original L4U Platinum data.

However, before performing this upgrade, we always recommend that you ensure you have a current backup. If you're not sure, please refer to Manual Backup on page 347 of the *Platinum User Manual v2.3* to perform a backup.

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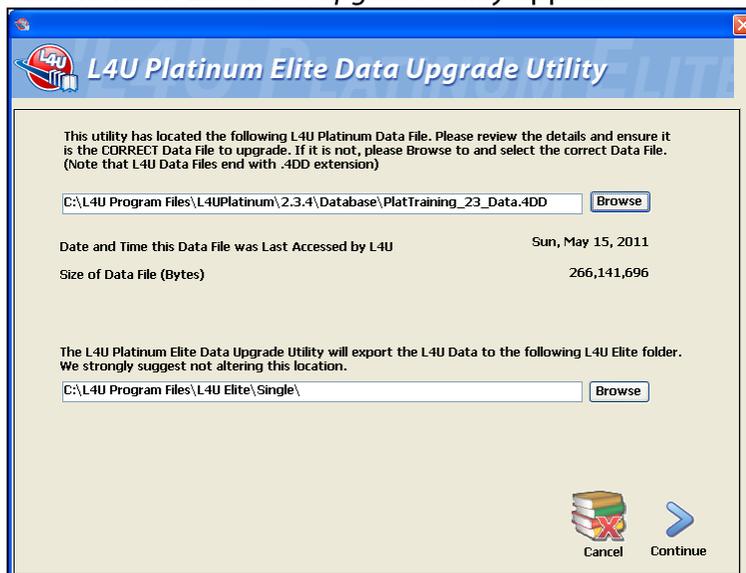
## Install L4U Platinum Elite

L4U Platinum Elite Multi-User software is available from L4U's Client Corner or via the L4U Platinum Elite Install CD. Install the Server software on the Server computer and install the Admin Utility at each of the computers where L4U Platinum Client currently exists. Launch the appropriate Installer and follow the onscreen directions.

## Run the L4U Elite Upgrade Utility

After L4U Platinum Elite Server software is installed, your L4U Platinum data needs to be transferred to L4U Platinum Elite. Follow these steps to do so:

1. Launch the *L4U Elite Upgrade Utility*
  - The default location is at *C:\L4U Program Files\L4U Elite\Server\L4U Elite Upgrade Utility* where C: is the drive where L4U Elite Server software is located
2. Select *Administrator* from the User Identification List
3. In the Password field, enter *Items*
  - This password is case sensitive
4. Click *Connect*
5. The *Platinum Elite Data Upgrade Utility* appears

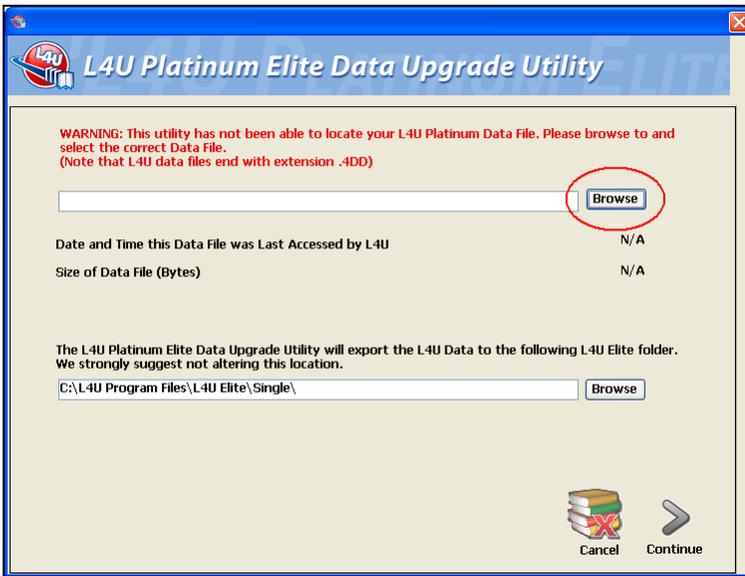


Review the location of the source datafile. This will be the same as the Current Datafile in Step 2 above in *Locate your Current Datafile* on page 6

6. If the Upgrade Utility cannot locate the Current Datafile, Click *Browse* and navigate to the correct location. Please refer to *Locate your Current Datafile* on page 6.

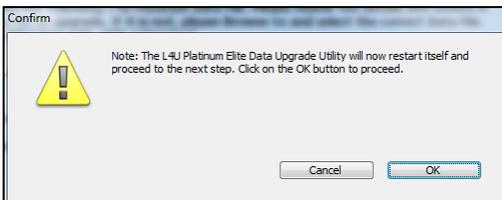


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The default datafile location for Platinum 2.3 is *C:\L4U Program Files\L4UPlatinum\Server\Server Database* or for Platinum 2.3.4 it is at *C:\L4U Program Files\L4UPlatinum\2.3.4Server\Server Database*

7. Click *Continue*
8. Click *OK* at the confirmation Alert



9. Log In Again. Click *Administrator*
10. In the Password field, enter *Items*
  - This password is case sensitive
11. Click *Connect*

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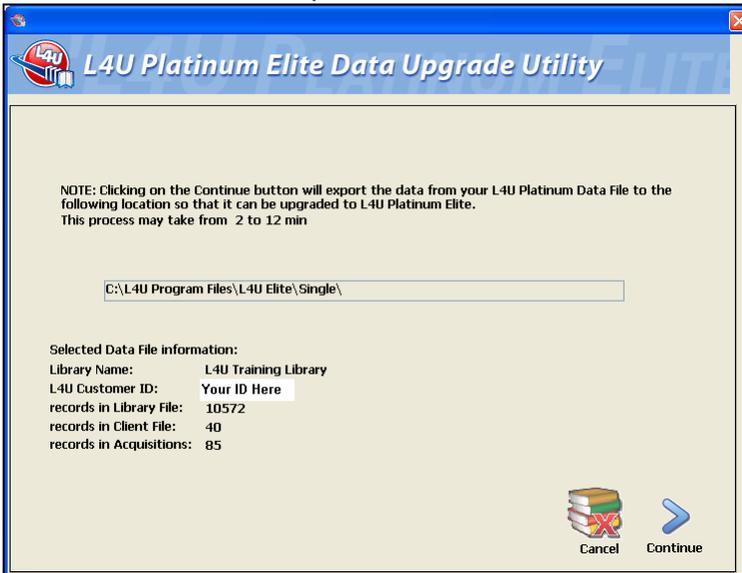
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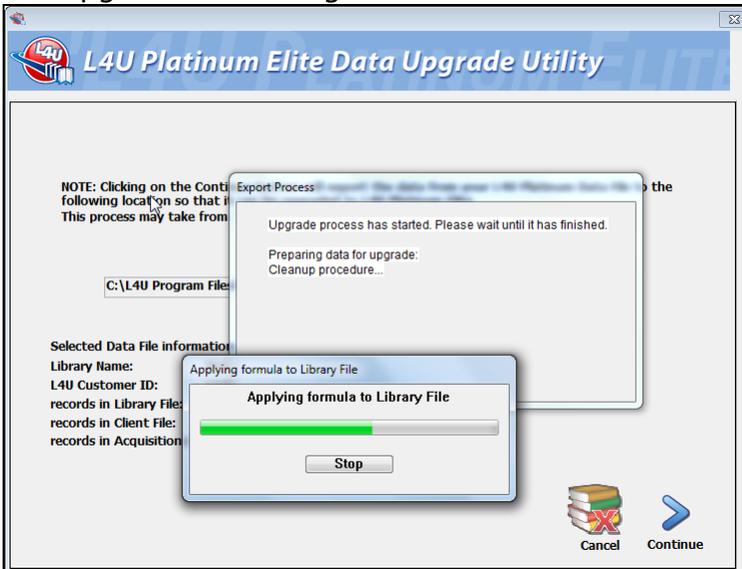


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12. Click *Continue* at the export confirmation screen



13. The Upgrade Process begins



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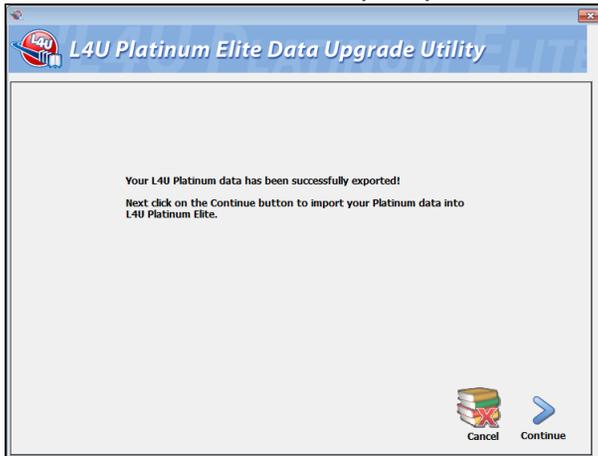
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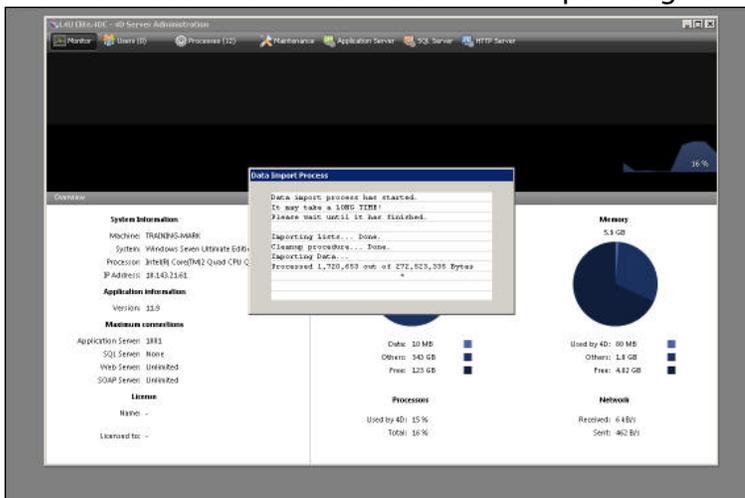


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14. Click *Continue* when the export process has finished



15. The L4U Elite Server starts and the data import begins



16. The Server is finished importing data when the Data Import Process dialog disappears

## ***Install & Launch the L4U Platinum Elite Admin Utility (Elite Client)***

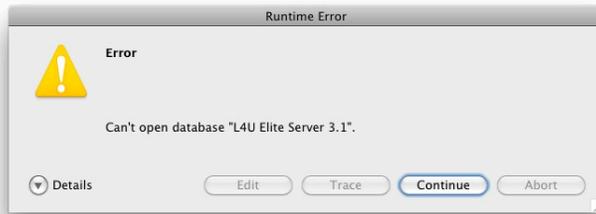
Install the L4U Platinum Elite Admin Utility at each computer that L4U Platinum Client is currently installed. The Elite Admin Utility installer will not delete the Platinum Client. You can delete it later if desired. Launch the Installer and follow the onscreen directions.

1. On the Windows desktop, Double Click on the *L4U Platinum Elite Admin Utility (Client)* shortcut
  - If the shortcut is unavailable, use the Windows start menu *Start > Programs > L4U Elite > Admin Utility > L4U Platinum Elite AU (Admin Utility)*



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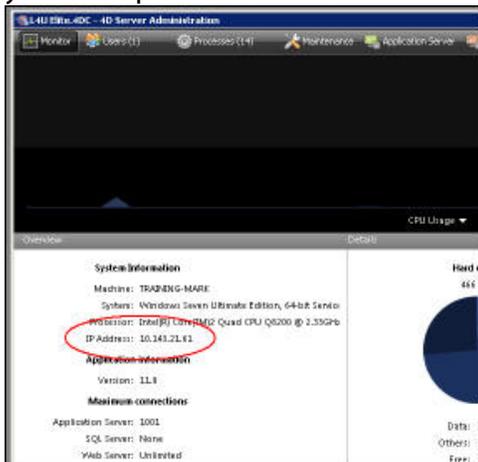
2. Click *Continue* at a possible Error screen



3. In the Connection to 4D Server screen that appears, Click the *L4U Elite Server 3.1* item from the *Available* tab.



4. If you do not see the server computer, Click the *Custom* tab. Enter the IP address of the L4U Platinum Elite Server as displayed on the L4U Elite Server Monitor window. If you do not have access to the L4U Elite Server computer, contact your IT Department or your Computer Technician.



5. Click *OK*
  - A screen may appear stating, Duplicating Resources Locally
6. Select *Administrator* from the User Identification List
7. In the Password field, enter *Items*
  - This password is case sensitive
8. Click *Connect*
9. Click *OK* when prompted to Enter your License Number & Activation Code

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10. Enter the necessary *Library Profile* information
  - Customer ID, Library Name, Address, Telephone Number, License Number & Activation Code should be entered
  - Leave *Replace Library Name with Location* unchecked
11. Click *Activate*
12. Click *Ok* when Activation is successful
  - If Activation fails, please contact L4U Support for an Authentication code
13. Click *Save* to exit the Library Profile screen
14. Enter your usual Librarian Client Code and PIN and login as normal

**Please proceed to *After Upgrading* on page 13**

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## **After Upgrading**

All users should run a *Utilities with No Options Selected* after they log in for the first time. To do so:

1. *File > Utilities*
2. With no options selected, click *Run Utilities*
3. A Confirmation screen appears, click *Yes*
4. When the procedure is complete, an Alert message appears. Click *OK*
  - It is not necessary to perform a compact at this time

Some features in L4U Platinum will be reset to factory defaults after the upgrade. Please review the following points to see if they apply to you. Relevant chapters and/or page numbers refer to the Platinum 2.3 User Manual (PUM) or Platinum Web Manual (PWM). The chapters or page numbers in square brackets refer to the recommended L4U User/Web Manual v3.1, the new Platinum Elite documentation.

- Automatic L4U Backup will need to be reset after the upgrade. PUM Chapter 23 [LUM Chapter 23]
- Access to Overdue Letters is disabled after upgrading to Elite. Login to Elite as a Superuser and enable Full Control to Overdue Letters in Access Management for the Access Levels that need Overdue Letters. This feature did not exist in Platinum and is disabled due to security reasons after the upgrade. PUM Chapter 2, Access Levels [LUM Chapter 2, p22 Access Levels]
- Keywords & Interface Tab in Preferences. Ensure keywording of all options is enabled for best performance. Chapter 3, p28-31 [Chapter 3, p33-36]
- Circulation tab in Preferences. Check Global Due Date and, if desired, enter the desired Due Date. Chapter 3, p37-45 [Chapter 3, p41-49]
- Email Settings. If you emailed your overdue notices, please check the Email tab in Preferences>Advanced. Chapter 3, p48 [Chapter 3, p53]
- Barcodes & Report Delimiters tab in Preferences. Please ensure Use Location Preferences for Accession #'s is set to *No*. Check your next barcode if you print your barcodes from L4U. Chapter 3, p53-54 [Chapter 3, p56-60]

Please refer to the *L4U Quick Start Guide v3.1* for a quick tour of what's new in L4U Elite when you have Elite up and running.

***Thank you for your continued support of L4U!***

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