

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



- 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



<u> Library Management Made Easyl</u>

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

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🕞 L4U Plati	inum Elite Data Upgrade Utility	LITE
NOTE: Clicking on the (following location so t This process may take C:\L4U Program	Continue button will export the data from your L4U Platinum Data File to hat it can be upgraded to L4U Platinum Elite. from 2 to 12 min n Files\L4U Elite\Single\	o the
Selected Data File inform Library Name: L4U Customer ID: records in Library File: records in Client File: records in Acquisitions:	nation: L4U Training Library Your ID Here 10572 40 85	
	Cancel	Continue

13. The Upgrade Process begins

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😪 L4U Platinu	ım Elite Data Upgrade Utility	2
NOTE: Clicking on the Conti	Export Process the	
This process may take from	Upgrade process has started. Please wait until it has finished.	
	Preparing data for upgrade:	
C:\L4U Program File	Cleanup procedure	
Selected Data File information		
Library Name: Applyir	g formula to Library File	
records in Library File:	Applying formula to Library File	
records in Client File:		
records in Acquisicon	Stop	
	Cancel Continue	



14. Click Continue when the export Process has finished

😪 L4U Platinum Elite Data Upgrade Ut	ility	LITE
Your L4U Platinum data has been successfully exported!		
Next click on the Continue button to import your Platinum data L4U Platinum Elite.	into	
		~
	N	
	Cancel	continue

- 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

Data Import Process	• •
This process may take a LONG TIME (approximately 30 minutes per 10,000 itens in your collection). Please wait until it has finished.	Advision of Still Education Solutions
Status: Data import process has started. Importing Lists Done.	L4U Platinum Elite 3.1 2011.2
Cleanup procedure Done. Importing Data	∰ Loading Upgrading Data

- 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
- Make note of the path and the Data File name listed LAU Platinum Server 2.3.4 - O × LAUPlatinum Server 2.3.4 SRB Education Solutions 1 PlatTraining 23 Data 40D Programme Complete Last Darkup Last Backup Date Next scheduled backup Total Memory: 3 BULK Activity Cache Htt Ratio che Menory 524 255 K Shafusi User Interface Executing #2 | Client Manager #3 : Cache Nanage Executing 0.5%
- 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.



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

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😪 L4U Platinum Elite Data Upgrade Utilit	ty=T
This utility has located the following L4U Platinum Data File. Please review the details is the CORRECT Data File to upgrade. If it is not, please Browse to and select the corr (Note that L4U Data Files end with .4DD extension)	and ensure it rect Data File.
C:\L4U Program Files\L4UPlatinum\2.3.4\Database\PlatTraining_23_Data.4DD	Browse
Date and Time this Data File was Last Accessed by L4U Sun, May	y 15, 2011
Size of Data File (Bytes) 260	6,141,696
The L4U Platinum Elite Data Upgrade Utility will export the L4U Data to the following I We strongly suggest not altering this location.	L4U Elite folder.
C:\L4U Program Files\L4U Elite\Single\	Browse
	Cancel Continue

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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C:\L4U Program Files\L4U Elite\Single\ Browse Cancel Continue

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



12. Click Continue at the export confirmation screen

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😪 L4U Plat	num Elite Data Upgrade Utility	ELITE
NDTE: Clicking on the I following location so t This process may take	Continue button will export the data from your L4U Platinum Data hat it can be upgraded to L4U Platinum Elite. from 2 to 12 min	File to the
C:\L4U Program	1 Files\L4U Elite\Single\	7
Selected Data File inform	lation:	
Library Name:	L4U Training Library	
L4U Customer ID:	Your ID Here	
records in Library File: records in Client File:	10572	
records in Acquisitions:	85	
	Canc	el Continue

13. The Upgrade Process begins

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😪 L4U Platinu	m Elite Data Upgrade Utility	E
NOTE: Clicking on the Conti following locatyon so that i This process may take from C:\L4U Program File Selected Data File information Library Name:	Export Process the started. Please wait until it has finished. Preparing data for upgrade: Cleanup procedure	
L4U Customer ID: records in Library File: records in Client File:	Applying formula to Library File	
records in Acquisition	Stop	



14. Click Continue when the export process has finished

*	
🛞 L4U Platinum Elite	e Data Upgrade Utility
Your L4U Platinum data h Next click on the Continue L4U Platinum Elite.	ias been successfully exported! e button to import your Platinum data into
	Cancel Continue
The L4U Elite Serve	er starts and the data import beg
The L4U Elite Serve	er starts and the data import beg
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The L4U Elite Serve The L4U Elite Serve Processer Serve Madage Scale Serve Madage	

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

	Runtime Error
	Error
_	Can't open database "L4U Elite Server 3.1".
💎 Details	Edit Trace Continue Abort

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

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		-

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.

SL4U Elite.4DC - 4D Server Administration			
📰 Monitor 🛛 🍣 Contra (1)	Processes (14)	× Portenores	💐 azəkətəri Sərəə 🚆
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0/21054		1.4	cae -
System Informat	tion		Hard d
Mechine: TRADA	ING-MARK		466
Syntama: Wilmid	owa Seven Ultimate Editi	ion, 64-bit Senio	
Protessor: Intel	Company Quad CPU (Q6200 @ 2.55GPb	
(IP Address: 10.14)	1.21.81		
Appexation inform	00000		
Version: 11.8			
Maximum connec	tions		
Application Server: 1001			Data
SQL Server: None			Others
Web Server: United	ited		Free

- 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



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



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!