Version 16 Conversion Instructions for Converting Tabs3 & PracticeMaster Version 15 Software

This document provides instructions for converting Tabs3 and PracticeMaster software to Version 16. Please call your local reseller or consultant, or call Technical Support at (402) 419-2210 if you have any questions regarding this update.

Important Notes

Scheduling the Conversion: Users updating from Version 15 need to allow adequate time to perform the conversion. Running the conversion program is just one part of the conversion process. Additional time will need to be allotted for preparation, installation, and Outlook synchronization. For example, the Data File Integrity Check needs to be run twice for all programs, backups need to be made, PracticeMaster users will need to rebuild their conflict of interest files, etc.

Running on a Network: If running on a network, we strongly recommend running the conversion at the server for performance reasons. When installing, you must have Administrator rights.

Previous Versions: Previous versions of the programs will no longer be accessible once the conversion has been completed. Furthermore, once your data has been converted, it cannot be reverted to the previous version.

Client Server Version Note: Tabs3 Platinum and PracticeMaster Platinum are the new names for the Client Server Versions (CSV) of the software. There are multiple "CSV Notes" interspersed throughout the conversion instructions. These "CSV Notes" do not apply to firms with single user and multi-user licenses. During the update, CSV/Platinum firms will be prompted to enter the new Platinum Server Serial Number and Activation Key provided on the back of the CD case.

Outlook Integration: If your firm integrates Outlook with PracticeMaster, make sure each user that integrates PracticeMaster with Outlook has a current backup of their Outlook data before continuing. Also, we recommend copying page 6 of this document and distributing it to each user who integrates calendar and contacts with Outlook. Alternatively, this same information is available in Knowledge Base Article R11433 *(www.support.tabs3.com/main/R11433.htm).*

Time Matters Integration: Time Matters does not integrate with Version 16 at this time.

Amicus Integration: There are no known issues with Amicus Small Firm Edition integration with Tabs3 Version 16.

Palm Conduit Integration: Starting with Version 16, the PracticeMaster Palm Conduits will no longer be included in PracticeMaster. Users still using handheld devices with the discontinued Palm Operating System can take advantage of the improved synchronization between PracticeMaster and Outlook by using Outlook to synchronize to their legacy Palm OS® handheld devices. Any information you want to transfer to PracticeMaster via the Palm Conduits must be synchronized prior to installing Version 16. Moving forward, you can synchronize data from Palm OS® devices to PracticeMaster via Outlook.

Windows 2000, Novell, and GroupWise Sunset Information: Starting with Version 16, Windows 2000 and Novell are no longer supported. Integration with GroupWise is no longer available. Review which third-party software versions are supported for Version 16 in our Knowledge Base at www.support.Tabs3.com in Article R11300, "Third Party Integration Requirements."

Converting Older Versions: If you are converting software from a version older than Version 14, you will need to first convert to Version 14 using the Version 14 CD and a separate set of conversion instructions for older versions. Instructions on how to do this can be found in our Knowledge Base at www.support.Tabs3.com. After converting to Version 14, you can then install the software from the Version 15 CD, or download and install the update from http://www.tabs3.com/support/update/convweb.html. Once the conversion to Version 15 is complete, you can begin the Version 16 installation process as follows.

Step	Task	Detailed Instructions	Notes
1.	**Preparation for Conversion**		
☐	a. **Determine Current Working Directory**	Version 16 must be installed to the same location as Version 15. Start any Tabs3 or PracticeMaster software program. From the **Help** menu, select the **About** menu option. Write down the Current Working Directory in the space below:	**Note:** Perform this step on the computer from which you will be installing. **CSV Note:** Perform this step at the server.
	Current Working Directory:		
☐	b. **Tabs3 Palm Software**	1. If you use Tabs3 Palm Software, make sure you HotSync all data from handheld devices before installing the update. 2. Make sure the handheld device users do not perform data entry until the software has been updated to Version 16.	The Tabs3 Palm App will need to be uninstalled and reinstalled for each handheld as directed later in these instructions.
☐	c. **Tabs3 Remote**	If using Tabs3 Remote, do the following for *all* workstations using Tabs3 Remote. 1. Merge any data files created by Tabs3 Remote. 2. Print and delete remote entry verification lists. 3. After deleting the verification lists from within the Tabs3 Remote software, manually delete the following files from the remote workstation using Windows Explorer: R3FEEVER.DAT, R3FEEVER.IDX, R3CSTVER.DAT, and R3CSTVER.IDX. 4. Make sure the remote site does not perform data entry until it has been updated to Version 16.	
☐	d. **PracticeMaster Briefcase**	If using PracticeMaster Briefcase, do the following for *all* computers using PracticeMaster Briefcase. 1. Check in any data files created by PracticeMaster Briefcase before proceeding with the conversion. 2. Make sure the Briefcase users do not perform data entry until the software has been updated to Version 16.	
☐	e. **Tabs3 Device Interface & WCNVASCV Cost Recovery Programs**	If you use either the Tabs3 Device Interface or WCNVASCV cost recovery programs, merge all data from these programs *before* proceeding with the conversion.	
☐	f. **Run Data File Integrity Checks** ☐ **Tabs3** ☐ **Tabs3 Archive Check** ☐ **PracticeMaster** ☐ **APS** ☐ **TAS** ☐ **GLS** ☐ **GLS - Other Clients**	Run the Data File Integrity Check for all programs (*Utilities | Data File Integrity Check*): 1. Run the Data File Integrity Check program for *all* programs on the left with the **Read Only** check box cleared *(i.e., Tabs3, PracticeMaster, GLS, APS, TAS)*. 2. If converting Tabs3, also run the Tabs3 Archive Data Integrity Check. 3. If converting GLS, run the Data File Integrity Check for *all* GLS clients. Proceed only when there are no errors.	The Data File Integrity Check ensures that the data being converted is error-free before proceeding. **Tip:** Use the check boxes on the left to track your progress.

Step	Task	Detailed Instructions	Notes
☐	g. **Close Programs**	Close the following programs before starting the conversion: System Configuration, Tabs3, PracticeMaster, GLS, APS, TAS, and Taskbill. If you are running a multi-user version, be sure to close all of the above programs on the *server* and *all workstations*. 1. Make sure the above programs are closed on all workstations by viewing an Active User List for All users *(View | Active User List)*. 2. Close the program used to view the Active User List as directed in the previous step.	**Important:** Make sure that none of these programs are started **on the server or any workstation** until after the conversion is complete.
☐	h. **Back Up the Current Working Directory**	1. Using Windows Explorer, browse to the Current Working Directory (step 1a). Select the directory and all subfolders, and copy it to another location. Alternatively, you may use a third-party backup program of your choice. 2. CSV users will need to shut down the STI Server and STI Director service *before* making the backup. The STI Server and STI Director services can be stopped using the Services program, which is found in the Control Panel under Administrative Tools.	Do NOT skip this step. By backing up this folder, all program files and data files are included, providing a more efficient restore point than the data-only backup performed during the conversion.
2.	**Install and Convert**		
☐	a. **Install Programs**	Insert the Version 16 CD and follow the instructions to install the program files to the Version 15 Current Working Directory.	**CSV Notes:** You must perform this installation at the server. Additionally, you will need to shut down the STI Server *before* installing the update.
☐	b. **Begin Data Conversion**	The Data Conversion will be started automatically once the Tabs3/PracticeMaster program installer is completed. Follow the directions given in each conversion screen to begin the process.	The Data Conversion program is named STCONV16.EXE.
		New Feature: The conversion program uses the Internet to check if you have the most current conversion program available. If an active firewall is running on the computer, a message may be displayed asking if network access is allowed.	
☐	c. **Conversion Complete**	If using PracticeMaster, a message will be displayed indicating that the search indexes have been cleared and need to be rebuilt. Procedures to rebuild indexes are provided later in this document *(step #4a)*.	Links to this document as well as the Version 16 download page will also be displayed.
☐	d. **Download Newest Program Files**	1. Start Tabs3 *(or any other Version 16 software)*. 2. From the **Help** menu, select **About Tabs3** and write down the **Release Date**. 3. From the **Help** menu, point to **Internet Resources** and select **Software Update**. 4. Compare the Release Date you wrote down earlier with the Last Modified Date shown on the Web page. If the Release Date is *earlier* than the date shown on the Web page, download the file from the Internet and run it on the server.	If you already downloaded the newest version using the link provided by the conversion program, it is not necessary to perform this step.

Step	Task	Detailed Instructions	Notes
☐	e. **Run Data File Integrity Checks**	While still at the server, run the Data File Integrity Check program for *all* systems with the **Read Only** check box cleared. If you converted Tabs3, also run the Tabs3 Archive Data Integrity Check. If you converted GLS, run the Data File Integrity Check for *all* GLS clients.	If the Data File Integrity Check has errors, please call Technical Support. **Tip:** Use the list in step #1f to track your progress.
3.	**Workstation Installation**		
☐	a. **Workstation Installation**	Now that Version 16 is installed on the server, any workstations with Version 15 installed will automatically update to Version 16 when a Tabs3/PracticeMaster application is launched.	
		For any *new* workstations that will access the Tabs3/PracticeMaster applications, you will need to perform the following. 1. Browse to the Current Working Directory on the server and run SETUP.EXE. 2. SETUP.EXE will launch a local setup wizard. Follow the directions to complete the workstation installation. **Important:** When running SETUP.EXE, you must have Administrator rights.	
☐	b. **Tabs3 Remote**	1. To update Tabs3 Remote to Version 16, insert the install CD into *each* workstation that uses this program. Browse to the **Begin Installation** page on the CD Browser and select **Install Version 16 Software**. 2. Once the installation is complete and before you start Tabs3 Remote, create new Tabs3 Remote validation files using the main Tabs3 computer and transfer the validation files (R3*.*) to *each* computer that uses Tabs3 Remote. 3. Make sure Tabs3 Remote Version 15 data files are merged before adding Tabs3 Remote Version 16 transactions. Also make sure new validation files are present before starting Tabs3 Remote Version 16. Otherwise, errors will occur.	**Note:** If installing from a CD labeled "Version 16 Software" (as opposed to "Version 16 Update"), you will instead need to browse to the **More Options** page on the CD Browser and select **Install Tabs3 Remote**.

☐	c. **Tabs3 Palm Application**	1. You must uninstall the Version 15 Tabs3 Palm App from *each* handheld as follows:
		  a. From the handheld, on the Application screen, tap the time in the upper-left corner.
		  b. Once the **App** menu is displayed, tap the **Delete** menu option.
		  c. Tap **Tabs3** and then tap Delete.
		  d. Tap **Yes** to confirm you want to delete the program and data.
		  e. Repeat steps c and d to delete **Sat.FormsRDK** and **SFE_LSListBox**.
		2. Install the Version 16 Tabs3 Palm App by selecting ***Start
			All Programs	Tabs3 & PracticeMaster	Palm Software	Install Tabs3 Palm App***.
						3. Create validation files by starting Tabs3 and selecting ***Maintenance
							Integration	Handheld Integration*** from the menu. Select the **Type** tab, and in the **Handheld Type** field select **Tabs3 Palm App Data Files**.
								4. HotSync the Validation Files to each handheld.	

Step	Task	Detailed Instructions	Notes
☐	d. **PracticeMaster Briefcase**	To update PracticeMaster Briefcase to Version 16, insert the CD into each workstation that uses this program. Browse to the **Begin Installation** page on the CD Browser and select **Install Version 16 Software**.	**Note:** If installing from a CD labeled "Version 16 Software" (as opposed to "Version 16 Update"), you will instead need to browse to the **More Options** page on the CD Browser and select **Install PracticeMaster Briefcase**.
4.	**Finishing Touches**		

☐	a. **PracticeMaster Search Settings**	Rebuilding the PracticeMaster search indexes can take a long time. You can do this step later; however, conflict of interest searching capabilities will not be available until the indexes have been rebuilt.
		
		To rebuild search indexes
		1. Open PracticeMaster and select *Search | Search Settings*.
		2. Select the **Rebuild Index** tab.
		    a. Select all indexes that the firm uses.
		    b. Click the **Rebuild Now** button.	

☐	b. **Post Conversion Information**	The following Knowledge Base article includes Post Conversion information: • R11363 – Version 16 Post Conversion Information • R11490 – Version 16.2 Update Procedures	If you are the IT person performing the conversion, please make sure the appropriate personnel are made aware of these resources. We recommend you review this information before using the software.
☐	c. **Duplicate Contacts**	During the conversion, we converted your clients to contacts. In some situations, duplicate contact records may have been created in order to retain unique address and contact information. Additional information can be found in the following Knowledge Base Articles: • R11350 – Contact Management Overview • R11396 – Merge Contacts Program Simplifies Contact Cleanup • R11364 – Working with Duplicate Contacts	
☐	d. **More Information**	You can find a comprehensive list of Knowledge Base articles that include information regarding Version 16 features in the following article: • R11355 – Version 16 Information & Resources	

(continued…)

Initial Outlook Integration Information
when Converting to Version 16

PracticeMaster now has automatic two-way synchronization of contacts and calendar entries with Outlook. As a result, all users that integrate PracticeMaster with Outlook contacts and calendar entries need to be aware of the following:

Before Converting: Make sure each user that integrates Outlook with PracticeMaster has a current backup of their Outlook data before converting. This is a precaution in the event you synchronize items unintentionally, thereby making it easier to recover.

During Conversion: If Outlook integration is enabled before converting, it will be enabled after converting. Each user's integration settings will be converted based on their current settings with one exception; the threshold for displaying the Outlook Confirmation window will be set to "1". This means that the Outlook Confirmation window will be displayed when one or more records need to be synchronized.

Initial Startup: Each user that integrates PracticeMaster with Outlook will be asked to perform a synchronization upon launching PracticeMaster Version 16 for the first time. You do not have to perform this synchronization at this time. If desired, you can cancel out and work with the synchronization later. ***However, no other Outlook synchronization will occur until this initial synchronization has been performed***, as described in the following.

Initial Synchronization: After launching PracticeMaster for the first time, "Outlook Synchronization Suspended" will be shown in the status bar. Clicking the message in the status bar will display a window indicating why the synchronization is suspended. Once you proceed with the initial synchronization, any contact or calendar entry that is currently not synchronized will need to be confirmed via the Outlook Synchronization Confirmation window. In this window, you can use the pane on the left to filter the list by groups of entries that you want to synchronize or exclude from the synchronization. You can highlight a record and use the **Compare Records** button to view which fields in the record are different in Outlook and PracticeMaster. *(**Note:** Depending on the status of your data, you may see the Outlook Synchronization Confirmation window twice. A first pass checks all previously synchronized items to make sure they are in synchronization, regardless of date range or other criteria. A second pass synchronizes any entries that are not in both systems based on the criteria specified.)*

Note: Taking the time to review the synchronization information in the Outlook Confirmation window is critical to ensure a smooth conversion.

Considerations:
- Each client, contact, and Bill To address is now stored as a contact record in PracticeMaster. If you previously entered clients into Outlook, you may need to determine which record to keep. The Merge Contacts utility in PracticeMaster can be used after converting to easily combine duplicate contact records, allowing you to see the fields that are different.
- You may want to consider synchronizing to a new Contact folder in order to prevent duplicate contacts in your Outlook folder.
- If information in Outlook is not critical, consider clearing information in Outlook and then synchronizing.

New Options: To take advantage of the new synchronization features in Version 16, you will need to manually turn them on in your Outlook Synchronization settings *(Maintenance | Integration | Outlook Synchronization)*. We recommend considering the following configuration changes:
- Change **Outlook to PracticeMaster** synchronization to **Automatic** on both the **Calendar** and **Contact** tabs. By default, **Outlook to PracticeMaster** synchronization is set to **Manual**. In order for records entered in Outlook to synchronize to PracticeMaster immediately as they are entered, this option must be set to **Automatic.**
- Enable periodic synchronization on the **Synchronization Options** tab. This feature allows you to automatically synchronize records entered in PracticeMaster for you by other users to Outlook at a specified interval.
- Increase your confirmation threshold to 5 or 10 on the **Synchronization Options** tab. After the conversion, your confirmation threshold is set to 1. This means that anytime there are records to be included in a manual or periodic synchronization you will be required to review the records before synchronization can proceed. We recommend setting your confirmation threshold between 5 and 10 to begin with, and then adjusting it later as needed to ensure that a normal quantity of records will synchronize without interruption, whereas an unusually high number of records will still be brought to your attention.

Additional Resources:
- KB Article R11366, Configuring PracticeMaster/Microsoft Outlook Calendar & Contact Integration, contains screenshots and summary information regarding the new integration.
- KB Article R11400, Outlook Integration Guide, includes detailed information regarding this new integration. Appendix A and the Best Practices sections of this document are particularly helpful.
- Our Technical Support staff will be happy to help you with any questions you may have regarding synchronization.

Note: The information on this page of the Version 16 Conversion instructions is also available in our Knowledge Base at www.support.Tabs3.com in Article R11433, "Initial Outlook Integration Information when Converting to Version 16".

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