Version 17 Conversion Instructions for Converting Tabs3 & PracticeMaster Version 16 Software

This document provides instructions for converting Tabs3 Billing, PracticeMaster, and Tabs3 Financial Software to Version 17. Read through these instructions entirely before proceeding. 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

Allow Adequate Time for the Conversion: Firms that are updating will need to allow adequate time to perform the conversion.

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. You will be instructed to make backups in the following procedures.

Platinum Note: There are multiple "Platinum Notes" in these conversion instructions that only apply to firms using the Platinum version of Tabs3 and PracticeMaster. The Platinum versions have a 90000 series serial number.

Platinum ODBC Note: If you have Platinum software and use the standard ODBC driver, you must update the ODBC driver to Version 3.24. Updated ODBC driver CDs were sent out in January 2014. Additional information can be found in Knowledge Base article R10017, "Working with ODBC." You must also restart the Platinum server after the conversion in order for a required change to take effect.

Platinum SQL ODBC Note: If you are using Platinum SQL software, you must uninstall and then reinstall the c-treeACE ODBC drivers, which are updated during the Version 17 installation. The updated installers are located in the SQL_Extras folder in the Current Working Directory. See the "Installing the ODBC Driver" section of article R11397 for instructions on uninstalling and reinstalling the c-treeACE ODBC drivers.

General Ledger Notes: Significant enhancements were made to General Ledger (GLS), including the ability to store unlimited years of journal entries. As a result, all account balances require supporting journal entries. Furthermore, the ability to edit account balances in the Chart of Accounts is no longer available. During the conversion, adjusting journal entries may be made to support any edited balances. Detailed information regarding any journal entries made during the conversion is posted to a log file *(see step 2e).* Furthermore, changes were made to GLS where integration with Tabs3 Billing, Accounts Payable and Trust Accounting can only occur with GLS Client #1. Details can be found in R11533, Version 17 Post Conversion Information.

Third Party Integration: Knowledge Base article R11530, Third Party Integration Requirements, includes details regarding which third party software versions integrate with Version 17.

PracticeMaster Briefcase: Beginning with Version 17, the PracticeMaster Briefcase feature has been discontinued. You *must* check in any data files created by PracticeMaster Briefcase before converting. Firms wanting to access PracticeMaster data from outside the office should consider Tabs3 Connect. More information on Tabs3 Connect can be found at Tabs3.com/connect.

Converting Older Versions: If you are converting software from a version older than Version 16, you will need to first convert to Version 16 using separate conversion instructions for older versions. Instructions on how to do this can be found in our Knowledge Base at support.Tabs3.com.

Step	Task	Detailed Instructions	Notes
1.	**Preparation for Conversion**		
☐	a. **Determine Current Working Directory and write it down**	Version 17 must be installed to the same location as Version 16. To find the location, start any Tabs3 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. **Platinum Note:** Perform this step at the server.

Step	Task	Detailed Instructions	Notes
	Current Working Directory:		
☐	b. **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.	
☐	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 17.	

☐	d. **Run Data File Integrity Checks**
	  ☐ **Tabs3 Billing**
	  ☐ **Tabs3 Archive Check**
	  ☐ **PracticeMaster**
	  ☐ **APS**
	  ☐ **TAS**
	  ☐ **GLS**
	  ☐ **GLS - Other Clients**
		Run the Data File Integrity Check for all programs to make sure that the data being converted is error-free before proceeding (*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 Billing, PracticeMaster, GLS, APS, TAS)*.
		2. If converting Tabs3 Billing, 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.
			Tip: Use the check boxes on the left to track your progress.
			
			Note: There is no Data File Integrity Check in System Configuration.

☐	e. **Close Programs**	Close all of the following programs that your firm uses before starting the conversion: System Configuration, Tabs3 Billing, PracticeMaster, GLS, APS, TAS, and Taskbill. **Multi-User Note:** If you are running a multi-user version, be sure to close all of the above programs on the *server* and *all workstations*. You can verify that the programs are closed on all workstations by viewing an Active User List for all users *(View | Active User List)*. After viewing the list, close the program used to view the Active User List. **Platinum Note:** Platinum installs will need to stop the STI Server and STI Director services. The STI Server and STI Director services can be stopped using the Services program, which is found in the Control Panel under Administrative Tools.	**Important:** Make sure that none of these programs are started **on the server or any workstation** until after the conversion is complete.

Step	Task	Detailed Instructions	Notes
☐	f. **Back Up the Current Working Directory**	We recommend making a quick temporary backup of the entire Current Working Directory. Using My Computer or Windows Explorer (i.e., right-click the Windows Start menu and select **Open Windows Explorer**), browse to the Current Working Directory *(as noted previously in step 1a).* Right-click the directory and select **Copy**. Then, right-click on the drive letter where you want to store the temporary copy and select **Paste**. Alternatively, you can use a third-party backup program of your choice.	By making a temporary backup of this folder, all program files and data files are included. This backup provides redundancy as well as a more efficient restore point than the data-only backup performed during the conversion. You can select **Properties** from the right-click menu if you want to determine how much disk space is required.
2.	**Install and Convert**		
☐	a. **Install Programs**	Download the software from our download page and follow the instructions to install the program files to the Version 16 Current Working Directory. ***www.tabs3.com/support/update/v17upd.html*** **Note:** You must have Administrator privileges when installing the software.	**Platinum Notes:** You must perform this installation at the server.
☐	b. **Begin Data Conversion**	The Data Conversion will be started automatically once the Tabs3 program installer is completed. Follow the directions given in each conversion screen to begin the process.	The Data Conversion program is named STCONV17.EXE.
☐	c. **Conversion**	As part of the conversion, a backup of the data files will be made. Once the backup completes, the conversion will automatically begin.	**Note:** The conversion program uses the Internet to check if you have the most current conversion program available.
☐	d. **Conversion Complete**	Once the conversion has completed, the message "Conversion complete" will be displayed. After reading any messages, click **Close** to close the conversion program window. **PracticeMaster Note:** If your firm uses 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 2g).*	

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☐	e. **Review Log Files**	If the conversion encountered any unusual situations in your data set, you will be asked if you want to open the log file to view messages. Information regarding the various messages in this log file can be found in Knowledge Base article [R11536](#), STCONV17.LOG Information. **GLS Note:** If you converted GLS, a log file is created that includes information regarding the conversion of your GLS data. This file contains technical information in the event there are questions regarding the conversion. This file is named GLCONV17.PDF and is password protected because it contains sensitive financial information. Contact Technical Support for more information if you have questions regarding the conversion of your GLS data.	**Note:** The log file is named STCONV17.LOG. Log files are written to the Current Working Directory.
☐	f. **Run Data File Integrity Checks** ☐ **Tabs3 Billing** ☐ **Tabs3 Archive Check** ☐ **PracticeMaster** ☐ **APS** ☐ **TAS** ☐ **GLS** ☐ **GLS - Other Clients**	Run the Data File Integrity Check program for *all* systems with the **Read Only** check box cleared *(Utilities | Data File Integrity Check)*. If you converted Tabs3 Billing, 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.

☐	g. **Use PracticeMaster Search Settings to Rebuild Search Indexes**	**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 **Rebuild Now**.
			
			Note: If all check boxes are dimmed, this indicates you are not configured for conflict checking. You can skip this step; or, you can do the following if you would like to enable conflict checking.
			
			To enable conflict checking
			1. Open PracticeMaster and select *Search
				Search Settings*.
				2. Select the **Index Properties** tab.
				   a. For Conflict/Contact Fields, select Automatic.
				3. Click the **Rebuild Index** tab.
				   a. Select the Conflict/Contact Index.
				   b. Click **Rebuild Now**.
					Note: Rebuilding the PracticeMaster search indexes may take a while. You can do this step later; however, conflict of interest searching capabilities will not be available until the indexes have been rebuilt.

Step	Task	Detailed Instructions	Notes
3.	**Workstation Installation**		
☐	a. **Workstation Installation**	Now that Version 17 is installed on the server, any workstations with Version 16 installed will automatically update to Version 17 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 17, run the installer on **each** workstation that uses Tabs3 Remote. 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 16 data files are merged before adding Tabs3 Remote Version 17 transactions. Also make sure new validation files are present before starting Tabs3 Remote Version 17. Otherwise, errors will occur.	**Note:** If updating from an installation CD, you will need to browse to the **More Options** page on the CD Browser and select **Install Tabs3 Remote**.
4.	**Finishing Touches**		
☐	a. **Conversion Details**	The following Knowledge Base articles include additional information regarding the conversion and new features in Version 17. We recommend you review this information before using the software. • R11533 – Version 17 Post Conversion Information IMPORTANT • R11531 – Version 17 Information & Resources	
☐	b. **Ready to Use Version 17**	Once you have reviewed the Knowledge Base articles in the previous step, you are ready to begin using Tabs3 Version 17.	