Updating Tabs3 Software from Version 19 to Version 2020

Here's what you'll need:

- You must have Version 19 of the Tabs3 Software currently installed. If you are running a version prior to Version 19, visit Tabs3.com/multiupdate for links to prior version updates. If you are currently running Version 2020, no conversion is necessary, and you can install the update using the Check for Updates utility. See Knowledge Base Article R11773, "Tabs3 and PracticeMaster Update Notification," for more information.
- Exclusive access to the software for the duration of the update process.
- Administrator rights to the Tabs3 server.
- Either physical or remote access to the Tabs3 server (required for Platinum firms, recommended for all firms).

You can contact your local consultant or contact Technical Support at (402) 419-2210 if you have any questions.

The update can be split into three phases:

- Phase One - Before You Install
- Phase Two - Install
- Phase Three - Wrapping Up

Phase One - Before You Install

If you typically have IT install software on the server, you can do Phase One items prior to their involvement.

☐ **Step 1a: Merge Tabs3 Billing Remote and Tabs3 Device Interface Data**

If your firm uses Tabs3 Billing Remote or Tabs3 Device Interface (TBDevice), merge any data files created by these applications.

Note: Any data files that were created by Tabs3 Billing Remote or Tabs3 Device Interface (RMT*.*), but not merged into Tabs3 Billing, will be deleted from the Current Working Directory during the conversion process.

☐ **Step 1b: Prepare Tabs3 Billing Remote Workstations**

Additionally, you must complete the following steps on **all** workstations using Tabs3 Billing Remote.

1. Merge all data (see step 1a).
2. Print (if desired) and delete remote entry verification lists.
3. After deleting the verification lists from within the Tabs3 Billing 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 2020.

☐ Step 1c: Run Integrity Checks

1. Run the Data File Integrity Check *(Utilities | Data File Integrity Check)* for **all** applications currently installed with the **Full Scan** option selected (or **Read Only** check box cleared).
2. If Tabs3 Billing is installed, run the Archive Data Integrity Check *(Utilities | Archive Integrity Check)*.
3. If GL is installed, and you have more than one GL client (i.e., set of books), be sure to run the Data File Integrity Check for **each** GL client.

If errors are reported by the integrity checks, see Knowledge Base Article R11751, "Data File Integrity Check Errors (Ver. 19)," for troubleshooting steps. Contact Tabs3 Technical Support or your local Consultant if you need assistance resolving any errors. Proceed only when there are no errors.

Phase Two - Installation and Data Conversion

☐ Step 2a: Write Down the Current Working Directory and Serial Number

To find this information, select **Help | About** from any Tabs3 application.

Note: Platinum firms must perform the update at the server. However, we recommend that **all** firms perform the update at the server to reduce the update time.

☐ Step 2b: Close All Tabs3 Software Applications

Close all of the Tabs3 Software on the server and all workstations: Tabs3 Billing, PracticeMaster, Trust Accounting, Accounts Payable (AP), General Ledger (GL), System Configuration, Tabs3 Taskbill, Tabs3 Device Interface, and have all users log out of Tabs3 Connect.

You can verify that the applications are closed on all workstations by viewing an Active User List for all users *(View | Active User List)*. Do not reset any user unless you have first verified that the software is closed on their workstation. After verifying that all users are out of the software, close the application used to view the Active User List.

Important: Make sure that none of these applications are started **on the server or any workstation** until after the update is complete.

☐ Step 2c: Manually Back Up the Current Working Directory

Platinum Users: Manually stop the STI Server and STI Director services before making this backup. See Knowledge Base Article R11903, "Managing Platinum Services," for information on stopping and starting these services.

1. Using My Computer or File Explorer/Windows Explorer (i.e., right-click the Windows Start menu and select **Open Windows Explorer** or **File Explorer**), then browse to the Current Working Directory.
2. Right-click the directory and select **Copy**.
3. Right-click the location where you want to store the temporary copy and select **Paste**.

Alternatively, you can use a third-party backup application of your choice to make a complete backup of the Current Working Directory rather than an incremental backup.

You can select **Properties** from the right-click menu if you need to determine how much disk space is required.

Platinum Users: Start the STI Server and STI Director services once the backup is complete.

☐ **Step 2d: Install the Version 2020 Update**

Disable any third-party backup software that may perform a backup during the conversion.

From the server, use the following link to download and install the software.

Tabs3.com/update2020

Tabs3.com/update2020

When you start the install, make sure that the location selected by the installer matches the Current Working Directory path you wrote down.

Note: If you close the Data Conversion application (STCONV20.EXE) before the conversion process begins, you can launch it again from the Current Working Directory.

☐ **Step 2e: Conversion Complete**

Once the conversion has completed, click **Close** to close the conversion application window.

Phase Three - Wrapping Up

☐ **Step 3a: Run Data File Integrity Checks**

To ensure that no new errors are present after the update, run the Data File Integrity Check application for *all* systems with the **Full Scan (exclusive)** option selected *(Utilities | Data File Integrity Check)*. If you converted Tabs3 Billing, also run the Tabs3 Billing Archive Data Integrity Check *(Utilities | Archive Integrity Check)*. If you converted GL, run the Data File Integrity Check for *each* GL client.

If errors are reported by the integrity checks, see Knowledge Base Article R11819, "Data File Integrity Check Errors," for information on resolving any errors. Contact Tabs3 Technical Support or your local Consultant if you need assistance resolving any errors.

☐ **Step 3b: Update Tabs3 Billing Remote**

1. To update Tabs3 Billing Remote to Version 2020, run the same installer you used for the main software on *each* workstation that uses Tabs3 Billing Remote.
2. Once the installation is complete and before you start Tabs3 Billing Remote, create new Tabs3 Billing Remote validation files using the main Tabs3 Billing computer and then transfer the

validation files (R3*.*) to *each* computer that uses Tabs3 Billing Remote.

3. Make sure Tabs3 Billing Remote Version 19 data files are merged before adding Tabs3 Billing Remote Version 2020 transactions. Also make sure new validation files are present before starting Tabs3 Billing Remote Version 2020. Otherwise, errors will occur.

❏ **Step 3c: Initialize ODBC**

Legacy ODBC

If you updated from a version prior to Version 19 and your firm uses the ODBC Driver add-on product, you must do the following:

- Run the Initialize ODBC utility *(Utilities | Initialize <Product Name> ODBC)* in each application to create updated data dictionary files.
- If you use a combined ODBC data source (i.e., a data source that accesses multiple products), you will need to update that data source manually. See Knowledge Base Article R10017, "Working with ODBC" for more information.

❏ **Step 3d: Additional Update Details**

The following Knowledge Base articles includes additional information regarding new features in Version 2020 and Version 2020. Review this information before using the software.

- R11860 – Version 2021 Introduction to New Features
- R11812 – Version 2020 Introduction to New Features

Note: If you disabled any third-party backup software in step 2d, be sure to enable it again once the update has completed successfully.

Once you have completed Phase Three, you are ready to begin using Tabs3 Version 2020!

Last updated: Tuesday, June 7, 2022