

QuickStart for Installing STI Server and Tabs3 & PracticeMaster Client Server Version Software (CSV)

This document provides a general overview for the installation of STI Server and CSV software for firms who are:

- currently running Version 14.2 or 14.1 Tabs3 and PracticeMaster software (CSV or non-CSV)

Version 14.3 STI Server has increased system requirements for the server.

- 2 GB of RAM is recommended.
- A multi-core processor is recommended.
- Each kept HotBackup requires enough disk space to store the entire data set.
- Version 14.3 STI Server requires four additional connections for overhead purposes.

Notes: Users upgrading from Version 14.1 need to allow adequate time to perform the conversion. This data conversion will take roughly the same amount of time to run as it takes to reindex all of the data files in all programs combined. Additional information regarding this update can be found in KB Article R11177 - Converting and Updating CSV Software.

Tabs3 Remote Note: If you use Tabs3 Remote and you have a new Tabs3 serial number (e.g., upgrading to CSV), make sure you merge any remote data files before proceeding. Otherwise, the previously entered information cannot be imported. Also make sure that Remote users do not perform data entry until after the new Tabs3 Remote software has been installed.

Use the following steps as guidelines for installing the new software. Specific steps will vary, depending on which version you are converting from. Perform the steps in the exact order as outlined.

Step	Task	Detailed Information	Notes
1.	Run and time your top 5 reports.	Use the form on page 3 of these instructions.	
2.	Preparation		
	a. Make sure no users are in the software during the entire process.	1. Log in to the System Configuration software as a Manager. 2. View Active User List	Do NOT reset users unless you have verified at the workstation that the software is no longer open.
	b. Run a Data File Integrity Check in all programs (except System Configuration).	1. Utilities Data File Integrity Check (all programs) 2. Utilities Archive Integrity Check (Tabs3 only)	<ul style="list-style-type: none"> • In GLS, run for each GLS client. • Be sure to close all programs after completing. • Proceed only if no errors.
	c. If using GLS, verify GLS Data Paths for all GLS clients are located under the program directory. Paths must be stated as relative paths.	1. In GLS, print a GLS Client List (Reports GLS Client List). 2. Edit GLS Data Paths and/or move GLS clients if necessary. Step-by-step procedures for moving GLS clients can be found in KB Article R11191 - How to Move GLS Clients.	HotBackup will only back up GLS clients whose GLS Data Path is located under the program directory. Furthermore, mapped drives can no longer be used in the GLS Data Path for CSV installations.
	d. Close all Tabs3 & PracticeMaster programs.	Includes System Configuration, Tabs3, PracticeMaster, GLS, APS, and TAS.	
	e. Stop the STI Server.	Chapter 3 of the STI Server Manual located on the CD.	Only applies if already using STI Server and Client Server Software.
	f. Make a temporary backup.	Copying the entire contents of your program directory has the advantage of including program files.	

Step	Task	Detailed Information	Notes
3.	Install the Tabs3/PracticeMaster Client Server Version software.	<ol style="list-style-type: none"> 1. Insert the CD. 2. Select Install Version 14 Software. 	It is important to realize that the software will not function properly until after STI Server has been installed.
4.	Install the STI Server software. The STI Server software must be installed from the server itself. This CD shows "STI Server V8.27.159" on the label.	<ol style="list-style-type: none"> 1. Insert the STI Server CD. 2. Select Install STI Server. <p>Note: Detailed installation instructions are included in Chapter 2 of the STI Server Manual located on the CD.</p>	You will be required to activate STI Server. The activation program will be started automatically during the installation. The FairCom Server Serial Number and Activation Key required for activation can be found on the STI Server CD case.
		<p>Conversion Information: (Note: This conversion is not required for users already using Client Server Version 14.2 or later.) Upon completion of the STI Server installation, a Client Server conversion program must be run to convert your data files. This required conversion can take a long time to run (possibly hours). The conversion program will run automatically (CSCONV14.EXE). Additional details can be found in KB Article R11177 - Converting and Updating CSV Software.</p>	
5.	Start the STI Server and verify the newly installed STI Director Service is running.	<ol style="list-style-type: none"> 1. Open the Services window. From the Start button, select Run..., enter SERVICES.MSC, and click OK. 2. Highlight "STI Server Service". If Status is blank, click Start. 3. Locate "STI Director Service". If not found OR Status is blank, call Technical Support. 	
6.	Configure HotBackup.	<ol style="list-style-type: none"> 1. Log in to the System Configuration software as a Manager. 2. Client/Server Client Server Configuration <p>Detailed information is in System Configuration Help (F1). KB Article R11195, Version 14.3 Update Procedures, also contains step-by-step procedures.</p>	<p>We recommend you configure:</p> <ul style="list-style-type: none"> • HotBackup Scheduling • HotBackup Folder and Number of HotBackups • HotBackup E-mail Notification
7.	<p>If using a firewall for internal network traffic, you must either:</p> <ul style="list-style-type: none"> • add required programs to your firewall as exceptions; or • open ports in your firewall. <p>This must occur in order to permit communications between STI server and client software.</p>	<p>Procedures will vary depending on the firewall being used and its settings. Detailed information can be found in KB Article R11197 - Opening Ports in Windows Firewall.</p> <ul style="list-style-type: none"> • STI Server - Port number varies - CTSRVR.EXE (STI Program directory) • STI Director - Port 1779 - STDIRECT.EXE (Windows directory) • Tabs3 Accelerator - Port 1780 - T3ACCEL.EXE (STI Program directory) • PracticeMaster Accelerator - Port 1781 - PMACCEL.EXE (STI Program directory) 	
8.	Download and install the most current Version 14.3 program files from the Internet.	www.tabs3.com/support/update/v143update.html	
9.	Run a Data File Integrity Check in all programs.	<ol style="list-style-type: none"> 1. Utilities Data File Integrity Check (all programs) 2. Utilities Archive Integrity Check (Tabs3 only) 	<ul style="list-style-type: none"> • In GLS, run for each GLS client. • Proceed only if no errors.

Step	Task	Detailed Information	Notes
10.	If using Tabs3 Remote, install the Tabs3 Remote software at each remote installation.		
11.	If using PracticeMaster Palm Conduits or PracticeMaster Word Document Assembly, you must update each workstation using the SETUP program.	<ol style="list-style-type: none"> 1. From the workstation, click the Start button, and then click Run... 2. Click the Browse button and navigate to the directory where the Version 14 program files were installed on the server. Then, select the SETUP.EXE file found in the program directory. Click Open and then click OK to run the program. 	
12.	Run and time the reports you timed in step 1.		
13.	Review your current third-party backup methods and schedule. With the implementation of HotBackup, you may need to make minor modifications to your third-party backup to prevent conflicts with HotBackup. A complete discussion of the issues can be found in KB Article R11213 - Backup Strategy.		
14.	Remove the temporary backup created in step 2f.		

Note: These instructions reference various articles in the Tabs3 and PracticeMaster Knowledge Base, which can be found on the Internet at www.support.Tabs3.com. KB Article R11196, Client Server Resources, includes a comprehensive list of CSV-related documentation. KB Article R11195, Version 14.3 Update Procedures, introduces various non-CSV and CSV features, includes frequently asked questions, and includes optional post conversion procedures.

ODBC Note for Users Converting From Version 14.1: Users who have the ODBC Driver add-on product will need to delete the CTSYSCAT.FCS file in the Tabs3 program directory and then use the ODBC Administrator to modify the sector size from 16 to 64. Details can be found in R10017 - Working with ODBC.

Report Benchmark Times

The new Report Accelerators will run your Tabs3 and PracticeMaster reports faster--in many cases dramatically faster. We recommend timing your most common Tabs3 and PracticeMaster reports **before** installing CSV Version 14.3 and timing them again **after** the installation so you can see the increased performance. Use the exact same workstation to run the reports and the exact same report parameters. If desired, duplicate this table to see before and after results for multiple workstations.

Select the Tabs3 and PracticeMaster reports that take longest for your firm to run, the reports you run most often, or a combination of these. A detailed list of which reports are accelerated and which reports are not accelerated can be found in KB Article R11182 - Tabs3 and PracticeMaster Accelerators.

Report Name	Number of Pages	Notes	Time Before	Time After