

# QuickStart Version 15 Conversion Instructions for Converting Tabs3 & PracticeMaster Version 14 Software

This document provides conversion instructions for converting Tabs3 and PracticeMaster software to Version 15 and can be used by firms who are:

- Currently running Version 14 Tabs3 and PracticeMaster software (CSV<sup>1</sup> or non-CSV)

Your local Tabs3 reseller and our Technical Support Representatives are available to assist you with any questions you may have. 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

**Converting Versions Prior to Version 14:** If you are converting software from a version prior to 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](http://www.support.Tabs3.com). After converting to Version 14 using the Version 14 CD and other instructions, you can then use the Version 15 CD and these instructions to convert up to Version 15.

**Scheduling the Conversion:** Users updating from Version 14 need to allow adequate time to perform the conversion. Running the conversion program is just one part of the conversion process. The conversion program 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 time will need to be allotted for preparation, installation, and workstation setup tasks. For example, the Data File Integrity Check needs to be run twice for all programs, a backup needs 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 recommend running the conversion at the server. 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 back to the previous version.

**Time Matters Integration:** Time Matters Version 10 SP3 is required for integration with Tabs3 Version 15.








**Amicus Integration:** There are no known issues with Amicus integration with Tabs3 Version 15.







**CompuLaw Integration:** If integrating PracticeMaster with CompuLaw, CompuLaw Version 10 is required for integration with PracticeMaster Version 15.3. Details can be found in Knowledge Base Article R11303 ([www.support.tabs3.com](http://www.support.tabs3.com)).




Use the following steps as guidelines for converting the data to Version 15. Specific steps will vary, depending on which version you are converting from. **Perform the steps in the exact order as outlined.** Check boxes are provided for your convenience.





Step	Task	Detailed Instructions	Notes
1.	<b>Preparation for Conversion</b>		
<input type="checkbox"/>	a. <b>Tabs3 Remote</b>	If using Tabs3 Remote, do the following for <i>all</i> workstations using Tabs3 Remote. <ol style="list-style-type: none"> <li>1. Merge any data files created by Tabs3 Remote Version 14 <i>before</i> proceeding with the conversion.</li> <li>2. Print and delete remote entry verification lists.</li> <li>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 and R3FEEVER.IDX, R3CSTVER.DAT, and R3CSTVER.IDX.</li> <li>4. Make sure the remote site does not perform data entry until it has been updated to Version 15.</li> </ol>	Once all data files have been merged into Tabs3, make sure there are no remaining RMT*. * files in the Tabs3 Remote Current Working Directory on each workstation where Tabs3 Remote is installed.




<sup>1</sup> **CSV Notes:** The abbreviation CSV represents Client Server Version software. All CSV software has a 90000 or 50000 series serial number. CSV users must be running Version 14.3 in order to use these instructions. If using CSV software with a version of Tabs3/PracticeMaster prior to Version 14.3, please call Technical Support at (402) 419-2210.

Step	Task	Detailed Instructions	Notes
	b. <b>Tabs3 Palm Software</b>	<ol style="list-style-type: none"> <li>1. If you use Tabs3 Palm Software, make sure you HotSync all data from handheld devices before installing the update.</li> <li>2. Make sure the handheld device users do not perform data entry until the software has been updated to Version 15.</li> </ol>	The Tabs3 Palm App will need to be uninstalled for each handheld as directed later in these instructions.
	c. <b>PracticeMaster Briefcase</b>	<p>If using PracticeMaster Briefcase, do the following for <i>all</i> computers using PracticeMaster Briefcase.</p> <ol style="list-style-type: none"> <li>1. Check in any data files created by PracticeMaster Briefcase before proceeding with the conversion.</li> <li>2. Make sure the Briefcase site does not perform data entry until it has been updated to Version 15.</li> </ol>	
	d. <b>Tabs3 Device Interface (TBDEVICE) &amp; WCNVASCV Cost Recovery programs</b>	If you use either the Tabs3 Device Interface (TBDEVICE) or WCNVASCV cost recovery programs, merge all data from these programs <i>before</i> proceeding with the conversion.	
	e. <b>Determine Current Working Directory</b>	<p>Version 15 must be installed to the same location as Version 14.</p> <p>Start any Tabs3 or PracticeMaster software program. From the <b>Help</b> menu, select the <b>About</b> menu option. Write down the Current Working Directory.</p>	The Current Working Directory is where the data files, program files, and other files used by the software are stored on the server.
	f. <b>Print Verification Lists</b>	All verification lists will be deleted by the conversion program. Print these lists (if they exist) before starting the conversion if you want to retain a copy of this information. If using a multi-user version of the software, make sure to print verification lists for all users.	
	g. <b>Run Data File Integrity Checks</b>	Run the Data File Integrity Check utility program for <i>all</i> systems. If converting Tabs3, also run the Tabs3 Archive Data Integrity Check. If converting GLS, run the Data File Integrity Check for <i>all</i> 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.
	h. <b>Write Down PracticeMaster Search Settings</b>	<ol style="list-style-type: none"> <li>1. Open PracticeMaster and select the <b>Search / Search Settings</b> menu option.</li> <li>2. Select the <b>Index Properties</b> tab.</li> <li>3. Write down the settings as they are entered in this window.</li> </ol>	During the conversion, all search settings will be disabled. The only way to know what these settings were initially is to write them down before the conversion.

Step	Task	Detailed Instructions	Notes
	i. <b>Close Programs</b>	<p>Close the following programs on the server <b>and</b> all workstations before starting the conversion: System Configuration, Tabs3, PracticeMaster, GLS, APS, TAS, and Taskbill.</p> <ol style="list-style-type: none"> <li>1. Make sure the above programs are closed on all workstations by viewing an Active User List for <b>All</b> users (<b>View   Active User List</b>).</li> <li>2. Close any Tabs3 and PracticeMaster programs opened during the previous step.</li> <li>3. If you are installing PracticeMaster, close Microsoft Word, Microsoft Outlook, and HotDocs on the server and all workstations.</li> <li>4. Close the Tabs3 Palm Application and Palm Desktop for all workstations on the network. If any workstation has these icons loaded in the system tray while the conversion is performed, an error may occur.</li> </ol>	<p><b>Important:</b> Make sure that none of these programs are started <b>on the server or any workstation</b> until after the conversion is complete.</p>
	j. <b>Back Up the Current Working Directory</b>	<ol style="list-style-type: none"> <li>1. CSV users will need to shut down the STI Server <i>before</i> making the backup.</li> <li>2. Using Windows Explorer, browse to the Current Working Directory. Select the directory and all subfolders, and copy it to another location. Alternatively, you may use a third-party backup program of your choice.</li> </ol>	Do NOT skip this step.
<p>2. <b>Install and Convert</b></p>			
	a. <b>Install Programs</b>	Insert the Version 15 Tabs3/PracticeMaster CD and follow the instructions to install the program files to the Version 14 Current Working Directory.	<p><b>CSV Note:</b> You must perform this installation at the server.</p> <p><b>CSV Note:</b> CSV users will need to shut down the STI Server before installing the software.</p>
	b. <b>Begin Data Conversion</b>	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 STCONV15.EXE.
	c. <b>Conversion Complete</b>	<p>The following messages will be displayed when the conversion completes:</p> <ol style="list-style-type: none"> <li>1. If using PracticeMaster, a message will be displayed indicating that the Search Settings have been disabled and to reenale them. Procedures are provided later in this document.</li> <li>2. A message will be displayed indicating that the data conversion is complete. Click <b>OK</b> to proceed.</li> </ol>	
	d. <b>Run Data File Integrity Checks</b>	While still at the server, run the Data File Integrity Check utility program for <b>all</b> systems. If you converted Tabs3, also run the Tabs3 Archive Data Integrity Check. If you converted GLS, run the Data File Integrity Check for <b>all</b> GLS clients.	If the Data File Integrity Check has errors, please call Technical Support.

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	e. <b>Download Newest Program Files</b>	<ol style="list-style-type: none"> <li>1. From the <b>Help</b> menu, select <b>About Tabs3</b> and write down the Release Date.</li> <li>2. From the <b>Help</b> menu, point to <b>Internet Resources</b> and select <b>Software Update</b>.</li> <li>3. Compare the Release Date you wrote down earlier with the Last Modified Date shown on the Web page. If the Release Date is <i>earlier</i> than the date shown on the Web page, download the file from the Internet and run it on the server.</li> </ol>	
<b>3. Workstation Installation</b>			
	a. <b>Workstation Installation</b>	<p>Perform the following for <i>each</i> workstation that will access the Tabs3/PracticeMaster applications.</p> <ol style="list-style-type: none"> <li>1. On each workstation that uses Tabs3/PracticeMaster, browse to the Current Working Directory on the server and run SETUP.EXE.</li> <li>2. SETUP.EXE will launch a local setup wizard. Follow the directions to complete the workstation installation.</li> </ol> <p><b>Important:</b> When running SETUP.EXE, you must have Administrator rights.</p>	<p>Unlike previous versions of the software, program files are installed on the workstation in addition to being installed to the server. Running SETUP.EXE will install program files and updated software shortcuts on the workstation. If your original shortcuts were renamed, you will have two sets of shortcuts. Delete your original shortcuts.</p>
	b. <b>Tabs3 Remote</b>	<ol style="list-style-type: none"> <li>1. On each workstation where Tabs3 Remote is installed, verify that no RMT*. * files are present in the Tabs3 Remote Current Working Directory before proceeding with the update.</li> <li>2. To update Tabs3 Remote to Version 15, insert the CD into each workstation that uses this program. Browse to the <b>Begin Installation</b> page on the CD Browser and select <b>Install Version 15 Software</b>.</li> <li>3. Create new Tabs3 Remote validation files using the main Tabs3 computer and transfer the validation files (R3*. *) to each computer that uses Tabs3 Remote.</li> </ol>	<p><b>Note:</b> If installing from a CD labeled “Version 15 Software” (as opposed to “Software Update”), you will instead need to browse to the <b>More Options</b> page on the CD Browser and select <b>Install Tabs3 Remote</b>.</p>

Step	Task	Detailed Instructions	Notes
	c. <b>Tabs3 Palm Application</b>	<ol style="list-style-type: none"> <li>1. You must uninstall the Version 14 Tabs3 Palm App from each handheld as follows:               <ol style="list-style-type: none"> <li>a. From the handheld, on the Application screen, tap the time displayed in the upper left corner.</li> <li>b. Once the <b>App</b> menu is displayed, tap the <b>Delete</b> menu option.</li> <li>c. Tap <b>Tabs3</b> and then tap <b>Delete</b>.</li> <li>d. Tap <b>Yes</b> to confirm you want to delete the program and data.</li> <li>e. Repeat steps c and d to delete <b>Sat.FormsRDK</b> and <b>SFE_LSListBox</b>.</li> </ol> </li> <li>2. Install the Version 15 Tabs3 Palm App by selecting <b>Start   All Programs   Tabs3 &amp; PracticeMaster   Palm Software   Install Tabs3 Palm App</b>.</li> <li>3. Create validation files by starting Tabs3 and selecting <b>Maintenance   Integration   Handheld Integration</b> from the menu. Select the <b>Type</b> tab, and in the <b>Handheld Type</b> field select <b>Tabs3 Palm App Data Files</b>.</li> <li>4. HotSync the Validation Files to each handheld.</li> </ol>	
	d. <b>PracticeMaster Briefcase</b>	To update PracticeMaster Briefcase to Version 15, insert the CD into each workstation that uses this program. Browse to the <b>Begin Installation</b> page on the CD Browser and select <b>Install Version 15 Software</b> .	<b>Note:</b> If installing from a CD labeled “Version 15 Software” (as opposed to “Software Update”), you will instead need to browse to the <b>More Options</b> page on the CD Browser and select <b>Install PracticeMaster Briefcase</b> .
4.	<b>Finishing Touches</b>		
	a. <b>PracticeMaster Search Settings</b>	<ol style="list-style-type: none"> <li>1. Open PracticeMaster and select <b>Search   Search Settings</b>.</li> <li>2. Enter the settings that were written down earlier.</li> <li>3. Select the <b>Rebuild Index</b> tab.               <ol style="list-style-type: none"> <li>a. When asked if you want to save changes made to the <b>Index Properties</b> tab, click <b>Yes</b>.</li> <li>b. Select all indexes that the firm uses.</li> <li>c. Click the <b>Rebuild Now</b> button.</li> </ol> </li> </ol>	<b>Note:</b> Rebuilding these indexes can take a long time to run. You can do this step later; however, you will not have conflict of interest searching capabilities until the indexes have been rebuilt.
	b. <b>Tabs3 Report Writer and PracticeMaster Report Writer</b>	You may need to modify report definitions for any report writer report that utilizes a client phone number extension field. The field will need to be expanded from 4 digits to 5 digits.	

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	c. <b>ODBC Driver</b>	If using the ODBC Driver add-on product, you will need to do the following: <ol style="list-style-type: none"> <li>1. Run the <b>Initialize ODBC</b> program in each program to create updated data dictionary files.</li> <li>2. Delete the CTSYSCAT.FCS file in the Tabs3 Current Working 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. <i>(Note: CSV users who already did this when converting to Version 14.3 do not need to do this step.)</i></li> </ol>	<b>Note:</b> Be aware that some ODBC reports or applications may need adjustments as a result of new files, new fields, and some fields being moved.
	d. <b>More Information</b>	KB Article R11239, Version 15 Update Information, includes a quick walk-through of various new features in the software.	
	e. <b>E-mail Address</b>	If you did not receive the e-mail we sent your firm earlier this year regarding the downloadable Version 14.3 update, please send your current e-mail address to sales@tabs3.com so that we can update our records to ensure you receive future update notifications.	

**Terminal Services/Citrix Note:** The SETUP.EXE file will only need to be run once by a Terminal Services computer, no matter how many users log onto the workstation remotely. The following will need to be performed for each Terminal Services computer. Before running SETUP.EXE, delete any shortcuts to the Tabs3 and PracticeMaster programs for each user on the workstation. Once SETUP.EXE is complete, a single set of desktop shortcuts will have been created. These desktop shortcuts will need to be copied to all other users' Desktop directory, which for Terminal Services in Windows XP is C:\Documents and Settings\\Desktop, whereas in Vista is C:\users\\Desktop. *(Note: Locations may be different for Citrix).* Once the shortcuts have been copied to all other users' desktops, delete the shortcuts from the All Users directory (otherwise users will have two sets of shortcuts). Once users have their own shortcuts, they are free to add startup options as desired. Later, when the Tabs3 and PracticeMaster programs are updated on the server from the Web, an Administrator must open any Tabs3 or PracticeMaster program on the Terminal Server to update the program files on the Terminal Services computer. It is not necessary to run SETUP.EXE again, because the local program files will automatically update when the software is started.

**Note:** The STCONV15.EXE program will move unnecessary files from older versions of Tabs3 and PracticeMaster into a STV14OLD folder in the Current Working Directory. If you need to free up disk space, you may delete the contents of this folder; otherwise, this folder will automatically be deleted the next time the data is converted for a new version.

**CSV Note:** CSV PracticeMaster Premier users who have an empty slot on their **Files** tab of the Task Folders will see the eNote icon has been added there. If there are no free slots available, the eNote icon will not be placed there during the conversion; however, it can be added manually.

**CSV Note:** Starting with Version 15, the STI Server software is no longer sent on a separate CD. The STI Server software is included with the Tabs3/PracticeMaster software CD and will be installed at the same time as the Version 15 programs. However, the STI Server software is not included on the "Software Update" CDs, because current CSV users already have the STI Server software. Users who previously purchased CSV before Version 15 should keep their original STI Server CD with this CD.

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