

Version 19 Conversion Instructions for Converting Tabs3 & PracticeMaster Version 18 Software

This document provides instructions for converting Tabs3 Billing, PracticeMaster, and Tabs3 Financial Software to Version 19. 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

Be sure to allow adequate time to perform the conversion. If running on a network, we strongly recommend installing and 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.

Third Party Integration: Knowledge Base article [R11752](#), Third Party Integration Requirements, includes details regarding which third party software versions integrate with Version 19.

System Requirements: The minimum operating system requirements are Windows 7 SP1 or later, and Windows Server 2008 R2 or later. Additionally, firms using Windows 7 or Windows Server 2008 R2 may need to install a missing Windows patch ([KB2999226](#)) that is required by Version 19. This patch is required for the server and all workstations. Internet Explorer 11 must be installed on all workstations; however, it does not need to be the default browser. See Knowledge Base article [R11747](#), Tabs3 and PracticeMaster Software Requirements, for a complete list of system requirements.

ODBC & SQL Queries: Be advised that your third-party ODBC reports or SQL queries may need adjustments as a result of new field lengths that were implemented in Version 19 in preparation for future field length enhancements. Additionally, several field types were changed. You may need to consult your IT professional (or whoever created the queries or reports for your firm) to make changes to work with the new Version 19 file structures. Knowledge Base article [R11775](#), Field Length Changes from Version 18 to Version 19, includes more information.

Converting Older Versions: If you are converting software from a version older than Version 18, you will need to first convert to Version 18 using separate conversion instructions for older versions. Instructions on how to do this can be found in our Knowledge Base at [Tabs3.com/multiupdate](#).

Step	Task	Detailed Instructions	Notes
1.	Preparation for Conversion		
<input type="checkbox"/>	a. Write down the Current Working Directory and Serial Number	Version 19 must be installed to the same location as Version 18. To find the location, start any Tabs3 software program. From the Help menu, select the About menu option. Write down the Current Working Directory and software Serial Number in the space below. You will need the Serial Number when you download the software.	Note: Platinum firms must install the update at the server. Although not required for non-Platinum systems, we recommend that all firms install the update at the server for best performance.
	Current Working Directory: Serial Number:		
<input type="checkbox"/>	b. Tabs3 Device Interface program	If you use the Tabs3 Device Interface cost recovery program, merge all data from these programs before proceeding with the conversion.	

Step	Task	Detailed Instructions	Notes
<input type="checkbox"/>	c. Tab3 Remote	<p>If using Tab3 Remote, do the following for all workstations using Tab3 Remote.</p> <ol style="list-style-type: none"> 1. Merge any data files created by Tab3 Remote. 2. Print and delete remote entry verification lists. 3. After deleting the verification lists from within the Tab3 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 19. 	
<input type="checkbox"/>	d. Run Data File Integrity Checks <input type="checkbox"/> Tab3 Billing <input type="checkbox"/> Tab3 Archive Check <input type="checkbox"/> PracticeMaster <input type="checkbox"/> APS <input type="checkbox"/> TAS <input type="checkbox"/> GLS <input type="checkbox"/> GLS - Other Clients	<p>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):</p> <ol style="list-style-type: none"> 1. Lock Out All Users (File Lock Out All Users) so that users cannot start new tasks during this process. 2. Run the Data File Integrity Check program for all programs on the left with the Read Only check box cleared (<i>i.e.</i>, Tab3 Billing, PracticeMaster, GLS, APS, TAS). 3. If converting Tab3 Billing, also run the Tab3 Archive Data Integrity Check. 4. If converting GLS and you have more than one GLS client (<i>i.e.</i>, set of books), be sure to run the Data File Integrity Check for each GLS client. <p>Proceed only when there are no errors.</p>	<p>Tip: Use the check boxes on the left to track your progress.</p> <p>Note: There is no Data File Integrity Check in System Configuration.</p> <p>Note: We recommend performing this step at the server for best performance.</p>
<input type="checkbox"/>	e. Close Programs	<p>Close all of the following programs that your firm uses before starting the conversion: System Configuration, Tab3 Billing, PracticeMaster, GLS, APS, TAS, Taskbill, TBDevice, and Tab3 Connect.</p> <p>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.</p> <p>Be sure to also disable any third-party backup software that may be scheduled to perform a backup while you are converting.</p>	<p>Important: Make sure that none of these programs are started on the server or any workstation until after the conversion is complete.</p>

Step	Task	Detailed Instructions	Notes
<input type="checkbox"/>	f. Back Up the Current Working Directory	<p>We recommend making a quick temporary backup of the entire Current Working Directory.</p> <p>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 (<i>as noted previously in step 1a</i>). 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.</p> <p>Alternatively, you can use a third-party backup program of your choice to make a complete backup of the Current Working Directory rather than an incremental backup.</p> <p>Platinum Note: Be sure to manually stop the STI Server and STI Director services before making this backup to avoid sharing violations. See Knowledge Base Article R11903, “Managing Platinum Services,” for information on stopping and starting these services.</p>	<p>By making a temporary backup of this folder, all program files and data files are included. This temporary backup provides redundancy as well as a more efficient restore point than the data-only backup performed during the conversion.</p> <p>You can select Properties from the right-click menu if you want to determine how much disk space is required.</p> <p>Note: We recommend performing this step at the server for best performance.</p>
2. Install and Convert			
<input type="checkbox"/>	a. Install Programs	<p>From the server, download the software from our download page and follow the instructions to install the program files to the Version 18 Current Working Directory.</p> <p style="text-align: center;">Tabs3.com/update191</p> <p>Note: Make sure you enter the Current Working Directory you wrote down in step 1a.</p>	<p>Note: You must have Administrator privileges when installing the software.</p> <p>Note: Non-Platinum firms are not required to install the update at the server. However, we recommend installing at the server for best performance.</p>
<input type="checkbox"/>	b. Begin Data Conversion	<p>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.</p>	<p>The Data Conversion program is named STCONV19.EXE.</p>
<input type="checkbox"/>	c. Conversion	<p>As part of the conversion, a backup of the data files will be made. Once the backup completes, the conversion will automatically begin.</p>	
<input type="checkbox"/>	d. Conversion Complete	<p>Once the conversion has completed, the message “Conversion complete” will be displayed. After reading any messages, click Close to close the conversion program window.</p> <p>PracticeMaster Note: If your firm uses PracticeMaster on the Platinum SQL version, a message may be displayed indicating that the search indexes need to be rebuilt. Procedures to rebuild indexes are provided later in this document (<i>step 2g</i>).</p>	
<input type="checkbox"/>	e. Review Log Files	<p>If the conversion encountered any unusual situations in your data set, you will be asked to open the log file to view messages. Information regarding the various messages in this log file can be found in Knowledge Base article R11753, STCONV19.LOG Information.</p>	<p>Note: The log file is named STCONV19.LOG. Log files are written to the Current Working Directory.</p>

Step	Task	Detailed Instructions	Notes
<input type="checkbox"/>	f. Run Data File Integrity Checks <input type="checkbox"/> Tabs3 Billing <input type="checkbox"/> Tabs3 Archive Check <input type="checkbox"/> PracticeMaster <input type="checkbox"/> APS <input type="checkbox"/> TAS <input type="checkbox"/> GLS <input type="checkbox"/> GLS - Other Clients	Run the Data File Integrity Check program for all systems with the Full Scan (exclusive) option selected (<i>Utilities Data File Integrity Check</i>). If you converted Tabs3 Billing, also run the Tabs3 Archive Data Integrity Check. If you converted GLS, run the Data File Integrity Check for each GLS client.	Because additional integrity checks have been added to Version 19, it is not uncommon to encounter integrity check errors after converting. Integrity checks may also take longer to complete in Version 19. If the Data File Integrity Check has errors, please see Knowledge Base Article R11751 for information on resolving any errors.
<input type="checkbox"/>	g. Rebuild Search Indexes in PracticeMaster	If your firm is using the Platinum SQL version and you enabled encryption during this conversion, you will be prompted to rebuild PracticeMaster search indexes. Step-by-step procedures to rebuild search indexes can be found in R11743 , Version 19 Post Conversion Instructions.	
3.	Workstation Installation		
<input type="checkbox"/>	a. Workstation Installation	<p>Now that Version 19 is installed on the server, any workstations with Version 18 installed will automatically update to Version 19 when a Tabs3/PracticeMaster application is launched.</p> <p>For any new workstations that will access the Tabs3/PracticeMaster applications, you will need to perform the following.</p> <ol style="list-style-type: none"> From the workstation, browse to the Current Working Directory on the server and run SETUP.EXE. SETUP.EXE will launch a local setup wizard. Follow the directions to complete the workstation installation. <p>Important: When running SETUP.EXE, you must have Administrator rights.</p>	
<input type="checkbox"/>	b. Tabs3 Remote	<ol style="list-style-type: none"> To update Tabs3 Remote to Version 19, run the installer on each workstation that uses Tabs3 Remote. Once the installation is complete and before you start Tabs3 Remote, create new Tabs3 Remote validation files using the main Tabs3 computer and then transfer the validation files (R3*.*) to each computer that uses Tabs3 Remote. Make sure Tabs3 Remote Version 18 data files are merged before adding Tabs3 Remote Version 19 transactions. Also make sure new validation files are present before starting Tabs3 Remote Version 19. Otherwise, errors will occur. 	The installer for Tabs3 Remote is the same installer downloaded in step 2a.

Step	Task	Detailed Instructions	Notes
<input type="checkbox"/>	c. Platinum SQL Drivers	<ol style="list-style-type: none"> 1. From each workstation, use the Windows Start menu to access Apps & Features in the Settings window (Windows 10) or Programs and Features in the Control Panel (Windows 8.1 or prior). <ol style="list-style-type: none"> a. To uninstall the 32-bit driver, select “FairCom c-treeACE ODBC Driver x.x.x” from the list (<i>where x.x.x represents the version such as 10.1.2</i>) and click Uninstall. Click Yes when prompted to confirm. b. To uninstall the 64-bit driver, select “FairCom c-treeACE ODBC Driver” from the list and click Uninstall. Click Yes when prompted to confirm. 2. Access the Current Working Directory on the server. 3. Open the SQL_ODBC folder in the Current Working Directory. <ol style="list-style-type: none"> a. Double-click ODBC_SQL_32.msi and proceed with the installation. When the installation is complete, click Finish. b. Double-click ODBC_SQL_64.msi and proceed with the installation (64-bit operating systems only). When the installation is complete, click Finish. 	<p>If you are using the ODBC drivers included with the Platinum SQL software, you must uninstall and then reinstall both the 32-bit and 64-bit ctreeACE ODBC drivers, which are updated during the Version 19 installation.</p> <p>The updated installers are located in the SQL_ODBC folder in the Current Working Directory.</p> <p>Information on accessing features from the Start menu in each version of Windows can be found in KB Article R11794.</p>
4. Finishing Touches			
<input type="checkbox"/>	a. Initialize ODBC/SQL	<p>If using the ODBC Driver add-on product, you must do the following:</p> <ul style="list-style-type: none"> • Run the Initialize ODBC program (Utilities Initialize <Product Name> ODBC) in each program to create updated data dictionary files. <p>If using the Platinum SQL ODBC drivers, you must run the Initialize SQL program (Platinum Initialize SQL) in System Configuration prior to performing SQL queries. This process updates the SQL tables to reflect changes made by the Version 19 conversion process.</p>	<p>Version 19 reorganized the data file locations. Therefore, the Initialize ODBC program must be run in order for the new locations to be recognized.</p>
<input type="checkbox"/>	b. Conversion Details	<p>The following Knowledge Base articles include additional information regarding the conversion and new features in Version 19. Review this information before using the software.</p> <ul style="list-style-type: none"> • R11743 – Version 19 Post Conversion Information IMPORTANT • R11746 – Version 19 Information & Resources <p>Notes for IT Professionals</p> <ul style="list-style-type: none"> • If you are an IT professional performing the conversion for a firm, we recommend that you review the above articles for IT-related information, and then provide the articles to the firm’s Office Administrator/primary software user. • If the firm uses ODBC or SQL queries, be sure to read the information in R11743 regarding changes that may need to be made before the firm can successfully run their third-party ODBC reports and SQL queries. • If you disabled any third-party backup software in step 1e, be sure to enable it again once the conversion has completed successfully. 	
<input type="checkbox"/>	c. Ready to Use Version 19	<p>Once you have reviewed the Knowledge Base articles in the previous step, you are ready to begin using Tabs3 Version 19.</p>	

