Updating Tabs3 Software from Version 2021 or 2020 to Version 2022

Here's what you'll need:

- You must have Version 2021 or 2020 of the Tabs3 Software currently installed. If you are running a version prior to Version 2021 or 2020, visit Tabs3.com/multiupdate for links to prior version updates.
- Exclusive access to the software for the duration of the update process.
- Administrator rights to the file server.
- Either physical or remote access to the file server is required for all firms.

You can contact your Tabs3 Software consultant or contact Tabs3 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 - Installation and Data Conversion
- 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 2022.

☐ **Step 1c: Run Integrity Checks**

1. Run the Data File Integrity Check (In the Quick Launch, search for and select "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 (In the Quick Launch, search for and select "Archive Integrity Check").
3. If Tabs3 General Ledger (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 R11819, "Data File Integrity Check Errors," for troubleshooting steps. Contact Tabs3 Support or your Tabs3 Software 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 Software application.

Note: All firms must perform this update at the server.

☐ **Step 2b: Close All Tabs3 Software Applications and Initiate a Lockout**

1. Verify that the applications are closed on all workstations by viewing an Active User List for all users:
   a. In the Quick Launch, search for and select "Active User List". Do not reset any user unless you have first verified that the software is closed on their workstation.
   b. After verifying that all users are out of the software, click the **Lock Out All Users** button.
2. Specify a duration for the lockout (we recommend "Indefinite") and click **OK**.
3. Close the Tabs3 Software application without ending the lockout.

Important: The Lock Out feature was significantly improved in Version 2020 (Build 20.3). If you are not familiar with the updated version of this feature, keep the following in mind:

- Once the lockout has been initiated, only the user who initiated that lockout can log in or end the lockout prior to its specified duration. (A user with manager rights can override the lockout, if needed.)
- Unlike previous versions, the lockout remains in effect after all Tabs3 Software applications are closed.
- The user who initiated the lockout has full access to all functions in the Tabs3 Software, including exclusive tasks.

Note: The **Lock Out All Users** feature requires Version 2020 (Build 20.3) or later. If you are on a prior build of Version 2020, the **Lock Out All Users** button will not be shown, and you will need to ensure that all users remain out of the Tabs3 Software until the steps in this document are 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 (i.e., right-click the Windows Start menu and select **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 2022 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/update2022

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 (STCONV22.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, in the Quick Launch for ***each*** application, search for and select "Data File Integrity Check." Select the **Full Scan (exclusive)** option and run the integrity check. If you converted Tabs3 Billing, in the Tabs3 Billing Quick Launch, also search for and select "Archive Data 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 Support or your Tabs3 Software

consultant if you need assistance resolving any errors.

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

1. To update Tabs3 Billing Remote to Version 2022, 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 2021 or 2020 data files are merged before adding Tabs3 Billing Remote Version 2022 transactions. Also make sure new validation files are present before starting Tabs3 Billing Remote Version 2022. Otherwise, errors will occur.

☐ **Step 3c: ODBC**

Additional steps are required (including driver updates) for firms that use the standard FairCom ODBC driver or the Platinum SQL ODBC drivers. See the "All Programs" section of Knowledge Base Article R11882, "Version 2022 Post Conversion Information" for more information.

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

If you initiated a lockout in step 2b, you can end it now and allow users to access the Tabs3 Software.

The following Knowledge Base articles include additional information regarding new features in Version 2022. Review this information before using the software.

- R11882 – Version 2022 Post Conversion Information
- R11880 – Version 2022 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 Software Version 2022!

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