



Best Practices for Data Conversions

This white paper summarizes the most common problems we help resellers with when they convert clients from older versions of Tabs3 and PracticeMaster, and also provides detailed, step-by-step procedures that are used by our in-house conversion specialists. This information will help you avoid pitfalls and improve your own conversion procedures.

Common Issues

The following are the most common conversion mistakes:

- Not Running the Data File Integrity Check / Archive Integrity Check programs before converting
- Not resolving Data File Integrity Check errors before proceeding
- Not making a backup of the entire directory
- Not following the conversion instructions
- Not comparing before and after numbers (specific reports listed below)
- Not putting things in writing, including report balances at each level or other issues that come up, which you may need to report to the firm when the conversion is completed
- Not allowing enough time to complete and confirm a successful conversion

Perform a Test Conversion

As a best practice, you should perform a test conversion before performing the actual conversion whenever possible. This lets you resolve any issues in the test environment before you take down the firm's billing system for the conversion.

Alternatives

Consider whether performing the conversion is worth your time. We can perform the conversion for you, or refer you to independent consultants with conversion experience. Our conversion charges can be found in Knowledge Base Article **R10796**, Billable Support Policy.

Best Practices

Our conversion specialists use the following procedures. These particular procedures apply when converting from Version 12 and earlier to Version 16; however, you can use these steps as guidelines for any conversion.



Converting from Version 12, 11, 10, 9, or 8 to Version 16

Note: The following instructions are based on the assumption that the firm in question has not been on maintenance for some time, and therefore would only have new Version 14, Version 15, or Version 16 CDs available. If the firm has all of the interim CDs available, then they can follow the conversion instructions for the various CDs, but starting with the Version 12 CD may be preferred when converting Versions 8, 9, 10, and 11 because all of the required conversion programs are on the Version 12 CD.

1. Pre-Conversion paperwork
 - a. Outline what is going to be changed (i.e., notes from each set of conversion instructions, What's New lists, internal processes, etc.)
 - b. Explain cost of conversion
 - c. Have partner or representative of the firm sign off on the plan
2. Start with two copies of data in two separate folders. One data folder contains the original programs and data; the other folder starts out with the same data set, but is the folder where all work will be performed. Also create a "Notes" folder for saving important files along the way including various reports and log files.
3. Run the Data File Integrity Check in all programs, including every client for GLS. Run the Archive Integrity Check in Tabs3. Fix important problems. Make note of any other errors. (Some "nonimportant" errors might include error 80s or 81s in Tabs3, or error 5s in APS.)
4. Run the following Tabs3 reports and save them as PDF file to a folder.
 - a. Receipt Allocation Report – Run for the "To Date" period, sorted by "None" with "Totals Only" checked.
 - b. Client Ledger – Erase the "Ending Date" (just in case anything is future-dated), check the "Include Zero-Balance Clients" option, sorted by "None" with "Totals Only" checked.
 - c. Detail Accounts Receivable Report – Sorted by "None" with "Totals Only" checked.
 - d. Summary Work-In-Process Report – Sorted by "None" with "Totals Only" checked. Accounts receivable is not needed on this report.
5. Refer to the "Version 12 Conversion Instructions for Converting Version 8, Version 9 or Version 10 Systems" document and perform any needed steps in the "Pre-Conversion Checklist".
6. Install the Version 14 Pre-Conversion utility, which is found on the Version 14 program CD in the "Apps/PreConv/" folder. (Note: If the firm just has their original Version 14 update CD from 2006, you should download the PRE1410.EXE program from the 14.1 update web page via www.Tabs3.com/Support/Update.html.)
7. Run the Version 14 Pre-Conversion utility. Upon completion, if there are any warnings then preview the Post Conversion Report in Detail form with all optional check boxes checked, including those on the "Advanced" screen. Save the report to a PDF file. You can refer to Knowledge Base article **R11093** for detailed information on each warning code.
 - a. If there are any warning #802's, those statements will likely need to unbilled. Since at this point the data should still be on its original version, get back into Tabs3 and run a Pre-Update Statements Report and save it to a PDF file; this will preserve a list of all of the statements you are about to unbill. Then use the "Unbill Final Statements" function to unbill all of the final statements. Alternatively, the 802's can also be corrected by updating the statements instead, if that's more appropriate.
 - b. If there are any other pre-conversion warnings that you want to correct, especially including the ones referred to by the "some warnings may be corrected by running the Rebuild Client Ledger program in version 12" message, the programs and data may have to be on Version 12.2 to do so. To accomplish that, do the following:
 - i. Install the Version 14 programs into the Tabs3 folder.
 - ii. Run the necessary "STCONV##" (or WCONV9) programs to get the data up to version 12.
 - iii. Go to the following URL to get a temporary version of Tabs3 on version 12 – www.Tabs3.com/support/update/v141/Tabs3v12.exe
 - iv. Install the Tabs3v12.exe program into your Tabs3 folder. The programs will now be Version 12.
 - v. At this point you can run the Version 12.2 "Rebuild Client Ledger Detail" function if the pre-conversion recommended it. When doing so, the function will display a message indicating some clients had pre-conversion warnings and asks if you want to fix just those clients. Click "Yes". When it's finished, you can rerun the preconversion utility and save the revised report as a PDF file instead of the original one.



8. Install the Version 14 programs from the CD to your working directory (if you haven't already) and run the necessary STCONV## (or WCONV9) programs to convert the data up to version 14.
9. Run the Post Conversion Report again in Detail format with all optional check boxes checked. Save a copy as a PDF file. After previewing it, note how many and what kinds of warnings were received.
10. Inspect the STCONV##.LOG files for any notable changes, such as renumbered accounts in TAS (STCONV10) or payment adjustments in Tabs3 (STCONV14). Retain those logs in your Notes folder for the firm to reference.
11. Load the Version 14 programs and run the Data File Integrity Check in all programs again, including every client for GLS. Run the Archive Integrity Check in Tabs3. Fix important problems. Make note of any other errors. Consider saving the Data File Integrity Check Report as a PDF file.
 - a. If the firm has GLS and has any error 76's, rerun the Data File Integrity Check for the affected GLS client to confirm those errors were automatically cleared. Copy the G5DFIC76.LOG file to your Notes folder.
12. Rerun the following reports in Tabs3 and save them as PDF files. Compare the balances on the Client Ledger and WIP reports to confirm that they match the balances from the original reports.
 - a. Receipt Allocation Report – Run with “Period 1” set to “All” and “Period 2” set to “None”, with the report sorted by “None” with “Totals Only” checked.
 - b. Client Ledger – Erase the “Ending Date” (just in case anything is future-dated), check the “Include Zero-Balance Clients” option, sorted by “None” with “Totals Only” checked.
 - c. Detail Accounts Receivable Report – Sorted by “None” with “Totals Only” checked.
 - d. Summary Work-In-Process Report –Sorted by “None” with “Totals Only” checked. Accounts Receivable is not needed on this report.
13. Make a copy of the entire contents of your Version 14 working directory to a new folder as a backup before advancing to Version 15.
14. Install the Version 15 programs to your working directory. This installation may need to be obtained from www.tabs3.com/support/update/v15upd.html. At the end of the installation, the program will automatically segue into the STCONV15.EXE program to begin the conversion to Version 15.
15. Upon Completion, install the Version 16 programs to your working directory. At the end of the installation, the program will automatically segue into the STCONV16.EXE program to begin the conversion to Version 16.
 - a. Upon completion, run the Data File Integrity Check in all programs, including every client for GLS. Run the Archive Integrity Check in Tabs3.
 - b. Run the Tabs3 reports again and save them as PDF files to another folder. Confirm once more that the Client Ledger and Summary Work-In-Process Reports match your other reports' figures.
 - c. Review the “Finishing Touches” parts of the conversion instructions for any further procedures.
16. Post Conversion Items:
 - a. If you are installing the new programs and converted data on the client's site, review the changes and provide an overview of the new features. For example, in Version 16, you may want to discuss contacts, Matter Manager, install and explain Outlook integration, etc.
 - b. If you are returning the converted data to the firm and they are installing it themselves, provide documentation which outlines how to install the new programs and converted data. Advise them to run the Data File Integrity Check in all programs, including every client for GLS. Run the Archive Integrity Check in Tabs3. List out any post conversion items that need to be addressed before the data “goes live”.
 - c. Have the firm keep a copy of the data backed up immediately before and after the conversion. This way, the data can be referred to if any questions arise at a later time.

Additional Notes

When converting old Client Server Version data, refer to Knowledge Base Article **R11177**, Converting and Updating CSV Software.