



Upgrading existing legacy Smeadlink/SmeadSoft or FileTracker systems to TABFusion

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Upgrading any existing **Smeadlink/SmeadSoft or FileTracker** software installation is generally recommended for all end users. It is a common best practice to use the latest software versions available whenever possible. Please review the answers below to the frequently asked questions:

WHY?

Users with current maintenance contracts have the added benefit of access to the most current features and methodologies which may include added user functions and features, improved security, platform stability and data integrity. Help Files and Help Desk assistance are improved with every release and learning current features and functions is more productive than learning and maintaining legacy technology. End Users, Application Administrators and Network Administrators all benefit by using a TAB platform designed to comply and integrate with current operating systems and environments.

WHEN?

As soon as necessary: If there are features or enhancements identified essential or beneficial to the business process of the end user, these upgrades should be considered for the earliest possible implementation. Some customers rightly defer upgrading to a new version until a new release offers significant improvements or features over their current version. Often this is due to the perceived and actual costs of upgrading and additional training. These are legitimate factors to consider in deciding when to upgrade. TAB - Anaheim will only support users with up-to-date service contracts.

As soon as possible: In most situations, upgrading will involve multiple users and even multiple departments. An upgrade should be a carefully planned and scheduled event that is coordinated between department heads, end users and the IT department, and others as necessary. It is a best practice to upgrade all users to the same TAB Fusion version at the same time and complete the implementation as quickly as possible.

Before there is a problem: There is no single solution to balancing the philosophies of "We don't really need it because it's working just fine" with "An ounce of precaution is worth a pound of cure". Problems can range from user frustrations with legacy workarounds, throughput or accessibility; to IT wanting to use the latest technology to manage users, to older workstations being replaced and applications needing to be reinstalled; to the current security in place doesn't meet today's standards etc.

BY WHOM?

The primary benefit of a TAB Maintenance Contract is the free entitlement to the latest versions of TAB Software licenses. There is no charge for the software license; however, all TAB software upgrades require professional services from a qualified and accredited TAB Software Technician. In order to receive support from TAB, the TAB Software implementation must be installed or upgraded by a certified TAB Technology technician or accredited service provider. (There are a few end-users who have TAB certified in-house technicians as well.)

WHO DECIDES?

It is the end-user who decides when to upgrade. The TAB sales representative should contact users to evaluate the current situation, explain the advantages of upgrading and secure an order for the implementation and training that are necessary and establish a timeframe for the upgrade.

General Overview of the Steps involved in a TAB Software upgrade:

- Contact the customer and secure an order for the upgrade to include the scope and timing, hardware, software, professional services and training.
- Recommend and verify necessary or desired changes in infrastructure, such as servers, network connections, hardware, storage devices and backup systems.
- Meet with all parties, managers, end users, IT, etc, and create a checklist of priorities and needs.
- Make a test copy of the database and install in a test environment before going live.
- Back up the current database in the existing version. This should include validating the restored database from the back-up is completely functional.
- Schedule the upgrade with the end user.
- Test existing functionality for correct performance, i.e. verify that views, scripts, workflow and reports correct.
- Test new functionality for correct performance.
- Train users on changes specific to their job functions.
- Have the end-user(s) verify all functionality and features and sign-off on the System Acceptance Test.
- Have all users sign-off on their specific training experiences.

For more information or additional questions that you may have, please contact our Technical Support Desk at 877-306-8875.