

## Platinum Version of Tabs3 and PracticeMaster

Even More Speed, Reliability and Convenience

The Platinum version of Tabs3 and PracticeMaster offers a variety of enhancements that will help to increase the speed, convenience and reliability of Tabs3 and PracticeMaster. The Platinum version provides Tabs3 Connect, Accelerators, HotBackup, Auto-Recovery, Log Off User, Exchange Connector, eNote, and advanced reports, none of which are available in multi-user versions. Let's take a closer look at how these enhancements work.



### Tabs3 Connect



Tabs3 Connect provides access to Tabs3 and PracticeMaster anywhere you can connect to the Internet. No apps to download, simply go to [www.Tabs3Connect.com](http://www.Tabs3Connect.com) and log in using your iPhone®, Android device, iPad®, laptop, or even an Apple® computer. While logged in to Tabs3 Connect, you can add fees and costs, access the firm's client and contact lists, use the firm-wide calendar, and find case information in Matter Manager. You can also send and receive eNotes from others who are logged in to Tabs3 Connect or logged in at the office. On smartphones and tablets, you can tap to create a fee, and flick to scroll through a list. Tabs3 Connect was designed to protect attorneys' sensitive information. The information you access using Tabs3 Connect is secure because it resides at your office, on your computer. It won't be saved on our server, or on someone else's server in another country where it may not be protected by U.S. laws. In fact, similar to a financial institution, we SSL encrypt all of the communication between your mobile device and your office. Tabs3 Connect is free for firms with Tabs3 and PracticeMaster Platinum who are on maintenance.

### Accelerators

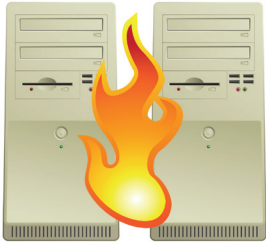


To increase the speed of common reports, Platinum uses Accelerators. Accelerators process reports on the server, rather than on your computer. The result is common reports run 10 to 30 times faster when compared to multi-user versions. For example, firms with large amounts of data can run a report that would currently take 30 seconds in as little as 1 second.

The increased speed is primarily due to changing where the report is processed. In multi-user versions, your computer asks the server for report data. The server responds by sending all of the necessary data across the network. Your computer begins to process the report, but if additional information is needed, new requests have to be sent and fulfilled over the network. In the Platinum version, your computer and network play a minimal part in report processing. This is because the report request is sent to the server, and then, rather than sending large amounts of data back to your computer, the Accelerator on the server generates the report. The finished report is then returned to your computer to be printed. By both reducing the data that needs to travel over the network and using a server that is typically faster than your computer, you can experience much faster report processing, and less network traffic. In addition to faster report processing, accelerators work the same way to also provide significant improvements to filtering and sorting.

## HotBackup

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While speed is an important Platinum enhancement, eliminating the inconvenience of midday backups is also a significant benefit to many firms. Often, firms dismiss prompts to make a backup before proceeding because of the hassle involved with getting all users to log out during the day. They may choose to rely only on a nightly backup. However, if they need to restore their backup, this can result in a loss of an entire day's productivity. To make it easier to get the backups you want and need, Platinum offers HotBackup, which allows users to make a backup while others continue to work.

Here is a common scenario for firms that use the multi-user version: A bookkeeper needs to use Change WIP Transactions. When she begins, Tabs3 prompts her to run a backup. To back up, everyone must exit the software. She knows that they have a lot of data and the backup will take more than a few minutes, and that getting everyone out of the software will be a major ordeal. So, she decides to skip the backup and take the risk that nothing will go wrong with her computer or network while she runs Change WIP Transactions. Platinum eliminates the risk and anxiety for the bookkeeper. It takes a snapshot of the data file when the backup is initialized. The backup is then processed on the server while everyone continues to work on their computers. The backup is safe, fast, and convenient.

You can customize HotBackup in different ways, including the number of previous backups to maintain, the location of the backups (allowing you to incorporate your Tabs3 and PracticeMaster backups into your firm-wide backup process), a backup scheduler that lets you choose the times and days to run the HotBackup, and optional e-mail notifications to let you know whether or not each HotBackup completes successfully. Besides convenience, HotBackup also allows you to save an unlimited amount of data to your backup files, rather than the 2GB limitation in the multi-user version. Please remember, the HotBackup should not replace a robust firm-wide backup procedure.

## Auto-Recovery

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Platinum also offers a stabilizing enhancement called Transaction Processing, which provides greater protection from data file corruption when performing most non-exclusive tasks. Many tasks in Tabs3 and PracticeMaster require changing several internal files. Transaction processing requires that all file changes complete successfully before any part of the transaction is committed to the main database. If even one operation fails, the entire transaction fails, and the main database remains unchanged. This is called Auto-Recovery. In most cases, one would simply need to perform the task again for it to process successfully. Similarly, Auto-Recovery is used

whenever the Platinum Server software is shut down unexpectedly. If the firm experiences a power outage or surge, or a hardware malfunction, Auto-Recovery will keep any incomplete database transactions from being committed, leaving the firm's main data set untouched.

Several processes within the multi-user version of Tabs3 and PracticeMaster (for example, the Update Statements utility) prompt users to make a backup before proceeding. Platinum eliminates the need to back up for many of these functions. At the server level, Transaction Processing takes a snapshot of the data before each transaction, function, or process. If the process is interrupted at any point before completion, the software will use the snapshot to roll back the transaction so that no error occurs. With this improvement, if a function such as Update Statements is interrupted due to a lost network connection, there will be no need to restore from a backup. Simply run a Data File Integrity Check to ensure no other problems exist, and then run Update Statements again once your network connection stabilizes.

## Log Off Users

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There still will be times when all users must exit Tabs3 and PracticeMaster, for example, when updates are installed. There will also be times when some users are away from their desks with Tabs3 and PracticeMaster still running. In multi-user versions of the software, resetting the user simply removes the user from the Active User List; it does not close the software. Therefore, errors can occur. The Reset feature is provided in the event a user's computer is shut down unexpectedly. If any Tabs3 or PracticeMaster files are open, resetting users can result in fatal errors. Using Log Off Users in the Platinum version, you can log these users out of the software safely without risking fatal errors.

Let's say your IT professional has to perform maintenance work on the server, which requires all users to be logged out of Tabs3 and PracticeMaster. Everyone is logged out except for one attorney who is out of the office for the afternoon. The attorney left Tabs3 open on his computer, and his office door is locked. Rather than resetting the user, the attorney can be logged out automatically using Log Off Users, eliminating the risk of fatal errors and file lock-ups. For users who are sitting in front of their computers, Log Off Users displays a popup message with a countdown, giving them the opportunity to save what they are working on.

## eNote

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As a communication tool, eNote provides fast and easy notification within the software. eNote combines the best features of e-mail and instant messaging to let you interrupt someone with an important message, facilitate workflow between users, retain records for accountability, and enhance your current case management procedures. It is also remarkably easy to use. When an attorney's next appointment arrives while he or she is on the phone, send them an eNote!

eNote also offers an easy way to notify a user of changes or additions to PracticeMaster records such as calendar appointments. The eNotify feature allows you to link any PracticeMaster record to an eNote. For example, a receptionist enters a new client, who has also requested a short introductory meeting with the attorney. While still viewing the client record, the receptionist can click eNotify, type a brief message, and then click "send". The sent eNote will automatically include a link to the client record. When the attorney receives the receptionist's eNote alerting her that a new client is requesting a quick meeting, she can click the link to instantly display the client's record and see all of the client's information. By using eNote, the receptionist has ensured that the attorney has the basic information about the client available at a moment's notice, without using a noisy intercom, placing a telephone call or sending an e-mail to an already overflowing inbox. eNote provides a fast, easy, and convenient form of communication for your firm.

## Reports

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The power of the Platinum server software and server side processing makes the following data intensive Tabs3 reports available:

**Accounts Receivable by Timekeeper Report:** This report lists all clients with receivables by any working timekeeper, or range of working timekeepers, regardless of the primary, secondary or originating timekeeper. This report allows a timekeeper to filter clients by including only those clients that the timekeeper worked on. Reporting by working timekeeper helps the billing department see which attorneys may need collections assistance, and it makes it easier to determine how much each working timekeeper is currently owed.

**Detail Accounts Receivable Report:** As a Platinum user, you have the option to include detail information for fees and costs, allowing you to view aged receivables for each working timekeeper and cost type.

## Exchange Connector

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Another Platinum feature, Exchange Connector, improves Outlook synchronization for the attorneys who spend time away from the office. PracticeMaster synchronizes contacts and calendars with Outlook, and Outlook synchronizes with most smartphones. Platinum's Exchange Connector synchronizes PracticeMaster calendars and contacts with Outlook via Microsoft Exchange. Because Microsoft Exchange is always on, appointments and contacts on your smartphone are synchronized with PracticeMaster even when your computer is turned off.

This means that if only one computer (for example, your server) is on with PracticeMaster running, the calendar and contacts added to PracticeMaster will synchronize with your smartphone no matter where you are. The opposite is also true. If, while you are away from the office, you add an appointment to the calendar on your smartphone, Exchange Connector will add it to your PracticeMaster calendar so that everyone at the office can see it.

## Summary

The use of Tabs3 Connect, Accelerators, HotBackup, Auto-Recovery, Log Off User, Exchange Connector, eNote, and advanced reports make Tabs3 and PracticeMaster Platinum not only faster, but more convenient and reliable.

For more information regarding the Platinum version, please visit [www.tabs3.com/platinum](http://www.tabs3.com/platinum), contact your local consultant or reseller, or contact us at (402) 419-2200 or [platinum@tabs3.com](mailto:platinum@tabs3.com).