

Installation Guide



Tabs3 Billing



PracticeMaster



Trust Accounting



Accounts Payable



General Ledger

Tabs3 Software Installation Guide

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Software Technology, LLC
1621 Cushman Drive
Lincoln, NE 68512
(402) 423-1440

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Welcome & Introduction

Congratulations! You are working with award-winning legal billing and practice management software.

Purpose of Guide

This Installation Guide covers installing the software. It includes information on basic concepts that are important to individuals who are responsible for the installation of the software and maintenance of the computers and network on which the software is installed.

More Info

In addition to this **Installation Guide**, the following resources are available:

| | |
|-----------------------------|--|
| Guides | A separate <u>Administrator Guide</u> includes information for configuring and setting up the software and a <u>Platinum Setup Guide</u> includes information for configuring Platinum features. Additional guides for separate software features are also available. All guides are available on our website at: <p style="text-align: center;"><u>Tabs3.com/docs</u></p> |
| Knowledge Base | You may be referred to additional detailed information located in our Knowledge Base on the Internet at: <p style="text-align: center;"><u>support.Tabs3.com</u></p> |
| Additional Resources | A comprehensive list of all resources for Tabs3 software can be found on page 42. |

Customer Service is Important

We understand that customer support is an important part of customer satisfaction. When you purchase a Tabs3 or PracticeMaster software license, you have our assurance of customer service and product support. Product support plays a key role in our customer service philosophy. Our Support staff is dedicated to helping you get the most from the software by answering technical questions about the product and how it works.

If you have a question or problem concerning the software, we recommend these steps:

1. Check the product documentation including the Help provided with the software. Often, you'll find the answer to a question there. To view Help, you can press F1 or select **Help | Help Topics** while in the software.

2. Refer to our Knowledge Base on the Internet. Our Knowledge Base contains extensive information on Error Troubleshooting, Networking & Windows Issues, "How To" Articles and Product-Related Articles. Our Knowledge Base can be launched from the **Help | Internet Resources | Knowledge Base** menu options in the software or accessed via: support.Tab3.com
3. Consult the consultant from whom you purchased the software license. If you can't find the answer in the product documentation, your consultant may be able to assist you.
4. Call our Tab3 Support Department at (402) 419-2210. Before you make the call, gather all information pertaining to the problem. We will need to know the serial number of the software, which can be found via the **Help | About** menus in the software.

Introducing Tab3 Software

Tab3 Software provides an integrated front office and back office solution. The front office software is PracticeMaster. The back office software consists of Tab3 Billing Software and the Tab3 Financial Software, which is comprised of Tab3 Trust Accounting (TAS), Tab3 Accounts Payable (APS), and Tab3 General Ledger (GLS).

Tab3 Software consists of the following products:

Tab3 Billing

Tab3 Billing is the award-winning industry standard for legal billing software.

PracticeMaster

PracticeMaster is a complete practice management system that helps your law firm find matter, client, and contact information, and find it fast. PracticeMaster includes powerful firm-wide calendaring, conflict checking, reporting, document assembly features, tracking for online research, email, documents, and phone calls, and more.

Tab3 Trust Accounting (TAS)

Tab3 Trust Accounting is designed to help your firm keep track of the trusts you manage. TAS allows check writing from 99 different bank accounts as well as records manually written checks. A bank account reconciliation program is included. IRS Form 1099-MISC information can be electronically processed using the Tab3 E-file service, printed directly from TAS, or combined with APS 1099-MISC information.

Tab3 Accounts Payable (APS)

Tab3 Accounts Payable automates payables, keeps track of vendor discounts and recurring payables, and allows check writing and recording manual checks. APS accumulates amounts for IRS Form 1099-MISC, which can be electronically processed using the Tab3 E-file service or printed from APS.

Tab3 General Ledger (GLS)

Tab3 General Ledger is designed to let you use your existing chart of accounts and select the financial statement formats you want. It includes a Reconciliation program to help you balance GLS with your bank statement or credit card statement. Financial statements can be run for any period.

System Configuration

System Configuration is used to configure users, passwords, groups, access profiles, and firm information. The **Administrator Guide** includes steps for configuring this information.

Because the software is integrated, there are no separate synchronizations that occur or links that need to be configured.

Platinum Software

Platinum is the top-of-the-line version of the Tab3 Software products. These programs utilize state of the art database technology to ensure the fastest performance and lowest network impact possible. They also include advanced reporting options, administrative tools and mobile access to your Tab3 Software data.

Platinum Server software is used with the Platinum version and is installed automatically.

Additional configuration information for the Platinum version can be found on page 17.

System Requirements

To use Tab3 software, the following software and hardware is required:

- Windows 10/8, Windows Server 2019/2016/2012 (including Windows Server 2012 R2). Recommended that all current Service Packs be installed.
- Minimum processor speed and system memory requirements are the same as your operating system requirements.
- Recommended screen resolution of 1280 x 1024 or higher. Minimum screen resolution of 1024 x 768 using 100% text size (i.e., 96 dpi).

- 32-bit color is recommended.
- The entire suite of Tab3 and PracticeMaster products requires less than 300 MB for program files. Additional drive space is required for data files.
- High speed wired network recommended. Wireless networks are not recommended due to performance and reliability issues.
- Internet access recommended.
- Information regarding integration with third-party applications such as Microsoft® Outlook®, Microsoft® Word, Worldox®, CalendarRules™, PenSoft® Payroll, QuickBooks®, and more can be found in Knowledge Base article [R11928](#), "Third Party Integration Requirements."

Operating System Environment Notes

Tab3 is only tested in a Windows environment. We do not test, support, or recommend hosting the Tab3 software on any computer or device running an operating system other than those listed.

- Tab3 can be run on a virtual machine.
- Tab3 can be used on a hosted server or via remote access. See [R11722](#), "Tab3 Cloud Options," and [R11721](#), "Hosting Tab3 Software in the Cloud."
- Tab3 can be run under Remote Data Services (RDS) or Citrix. See [R11284](#), "Using Tab3 and PracticeMaster Software on Terminal Services or Citrix."
- Technically, you can run Tab3 software on a file server that supports the Server Message Block (SMB) network protocol for file sharing, such as a Network Attached Storage (NAS) device. However, non-Windows operating systems may handle file sharing in ways that differ significantly from a Windows server. This can lead to fatal errors and network issues that we cannot support.
- **Do not install or use** Tab3 software on cloud applications or backup services that synchronize across devices, such as Dropbox, OneDrive, SharePoint, Google Drive, Box, Amazon Cloud Drive, Microsoft Distributed File System, etc. These types of applications are not designed to handle database applications that update multiple files at the same time for a single transaction.
- **Domain Controller Note:** Installing the Tab3 software database on a domain controller may require special IT consideration due to potential performance issues. Windows Server Essentials/Small Business Servers are always domain controllers, and any Windows server can be configured as a domain controller. Additional information can be found in the "Using a Domain Controller as the Tab3 Server" section of [R11637](#), "Network Performance Guide."

Platinum Requirements

The following additional system software and hardware is required for the Platinum Server computer.

- Platinum Server software.
- Platinum versions of the software (i.e., 90000 series serial numbers or 95000 for Platinum SQL Server).
- A multi-core processor is recommended.
- 2GB RAM is the minimum recommended memory for the Platinum Server.
- Ensure that plenty of free drive space is available. Temporary files created on the server can be quite large. Minimum free space of four (4) times the data set size is recommended. Each HotBackup requires enough drive space for the entire data set.
- Windows Server 2019/2016/2012 (including Windows Server 2012 R2), Windows 10/8. Recommended that all current Service Packs be installed. A 64-bit operating system is required for Platinum SQL Server.

Note: When running the Platinum Server on a non-server operating system (i.e., Windows 10/8), you are limited to the number of concurrent connections and may exceed the connection limit in that operating system.

- If using the Platinum Exchange Connector, refer to Knowledge Base Article [R11596](#), "Configuring the PracticeMaster Platinum Exchange Connector," for specific installation requirements.
- Workstations have the standard system requirements in addition to the Platinum Server items listed above.
- High speed wired network recommended. Wireless networks are not recommended due to performance and reliability issues.
- Platinum editions **require** a Windows operating system to operate. Platinum software cannot be installed on a non-Windows device such as an NAS device.

Additional Information Regarding Platinum Requirements

Platinum Version software is designed so that it can run on modest server hardware but can take advantage of more powerful servers.

- Adding RAM to a server is the least expensive way to improve server performance. Although Platinum will run on a 512MB server, at least 2GB RAM is recommended for best performance.
- The maximum amount of memory that can be allocated to the 32-bit Platinum Server is 0.8 GB on a 32-bit server and 2.0 GB on a 64-bit server. These limitations do not apply to the 64-bit Platinum SQL Server.
- Using Accelerator technology in Platinum, the faster the server's CPU(s), the less time it takes to process reports. A multi-core processor is recommended.
- If running Platinum Server software on a virtual machine, we recommend allocating multiple cores to the Platinum Server for best performance.

- In order to use HotBackup, your server must have enough free drive space to hold copies of the entire data set. You control the number of copies to keep but you must have enough free space to hold at least three full copies.
- The faster the server's drive is, the less time it takes to perform a HotBackup. Also, for best HotBackup performance, configure the source and destination folders on different physical drives.
- A Microsoft Server operating system is recommended (e.g., Windows Server 2019/2016/2012). Using a non-server operating system such as Windows 10/8 will work, but they were not designed as server operating systems and have some limitations, such as concurrent connections.

Integration Requirements

Our Knowledge Base includes information regarding versions required when integrating with other software such as Outlook, QuickBooks, Worldox, and more. The following Knowledge Base article provides an overview of the specific versions and releases of third party applications currently tested and supported that integrate with Tabs3 software.

R11928 - Third Party Integration Requirements

Preliminary Information

Before installing the software, you must make sure your environment is correctly configured to utilize Tab3 Software.

Data Location

When using the software on a network, all program and data files must reside on the file server. Workstations run a setup program that installs another copy of the program files on their computer in a local program directory. However, the workstations access the data files on the server. **Only one set of data files exists for the software** (i.e., each workstation does not have a separate set of data files). The directory in which the data files reside is referred to as the *Current Working Directory*. All data files reside on the server in the same directory as the program files.



Figure 1, Files Installed on the Server and Workstations

Note: We do not recommend installing the Tab3 software to Cloud applications that synchronize files across devices, such as Dropbox or other Cloud applications. These types of applications are not designed to handle database applications that update multiple data files at the same time for a single transaction. See Knowledge Base Article [R11721](#), "Hosting Tab3 Software in the Cloud," for details on Cloud hosting requirements.

Access Rights

All users must have **full rights** to the Current Working Directory.

Note: Platinum firms can limit access to the Database folder within the Current Working Directory to read-only. See the [Platinum Data Security](#) section for more information.

When installing the software on the server or workstation, you must have **Administrator privileges**.

Additional details regarding these requirements can be found in Knowledge Base Article [R11434](#), "User Rights Needed to Install and Use Tab3 and PracticeMaster Software."

Platinum Data Security

Firms running the Platinum version of the software can restrict access to the Database folder located within the Current Working Directory. This folder contains key files used to store data in the software. Restricting access to the Database folder ensures that unauthorized users cannot accidentally or deliberately modify or delete critical files and also provides increased protection from threats such as viruses and ransomware.

Additional details regarding this feature can be found in Knowledge Base Article [R11763](#), "Platinum Data Security."

Rights Required for PracticeMaster Plug-ins

Required settings are written to the windows registry for various PracticeMaster Plug-in features. Therefore, in order to successfully use these features, the feature must be installed by a user who has Administrator credentials. If you are running the software without these credentials, you will be asked to enter them at the time they are required. Once the Windows registry has been appropriately modified when an administrator starts or installs the Plug-in, it is no longer necessary for the user to have Administrator rights. These features include:

- Outlook Plug-In for email integration
- Internet Explorer Plug-in
- Word Plug-in
- Word Document Assembly Plug-in
- Excel Plug-in
- Adobe Plug-in
- PowerPoint Plug-in
- WordPerfect Plug-in
- HotDocs Document Assembly Plug-in
- Worldox Plug-in
- Windows Explorer Plug-in
- ScanSnap Plug-in

Bandwidth and Server Activity

Tab3 software, like other accounting and bookkeeping data processing software, is more bandwidth intensive than general business software. The data entry and report processing functions in the software generate significantly more traffic on a network than word processing or spreadsheet programs, for example. As a result, there are several best practices we recommend, such as not running the software in a wide area network (WAN), excluding the directory from continuous anti-virus scanning, and more.

Best Practices

We recommend the following best practices for using Tab3 software.

Wireless Networks

Data processing software, such as Tab3 software, is very disk I/O intensive. The software is constantly opening files, writing to them and closing them across the network. The software also makes frequent use of temporary files. For these reasons, the potential for Tab3 software encountering network connection errors is much greater than other types of software such as word processing software. Applications such as Microsoft Word do not send data across the network like data processing software, and therefore are not good choices for comparing frequency of network connection errors.

As a result, we recommend using a high speed wired network. Wireless networks are **not recommended** due to performance and reliability issues.

Wide Area Networks (WAN)

Transaction-based software, such as Tab3 and PracticeMaster, is designed to operate in a LAN environment, where the network speed is consistent and the connection is stable. Attempting to connect a remote workstation installation directly to the server via a WAN will result in poor performance and dropped connections, which will in turn cause fatal errors and possible data loss. The best way to avoid these issues is to use a WAN to remotely access a physical or virtual workstation instead. Knowledge Base Article [R10436](#), "Comparing Network and Cloud Options for Tab3 Software," includes multiple methods for allowing off site users to access the Tab3 and PracticeMaster software.

Antivirus Scanning

Some virus checking software has the ability to continuously virus scan any files that are accessed on the hard drive. This type of configuration can slow down the performance of software, particularly in a network environment. Because Tab3 software is very disk I/O intensive, the potential performance decrease caused by continuous virus scanning may be more apparent in our software than in some other types of software.

There have been reports of virus checking software adversely affecting performance and sometimes even causing runtime errors. For optimum performance, we recommend that virus checking software be configured in such a way as to minimize the effects of virus scanner interference.

- Firms who have disabled continuous virus scanning have reported significant improvements in performance and access times.
- If you are using continuous virus scanning software and you have it configured to scan all files, consider changing the configuration so that it *excludes* the following files in the Tab3 and PracticeMaster Current Working Directory and its subdirectories: *.DAT, *.IDX, *.TMP, *.LOG. (Note: You can find the location of the Current Working Directory in the Help | About window in any of the Tab3 software.)

Platinum Note: Users with Platinum software must also exclude *.FCS files.

- For optimum performance, consider excluding the Tabs3 and PracticeMaster directories from continuous virus scanning software (i.e., the Current Working Directory and all its subdirectories). These directories can be virus checked in a full disk scan during non-peak usage times.

Platinum Note: Users with Platinum software must exclude *.FCS files when performing a scan on demand.

Knowledge Base article [R10760](#), "Antivirus Software Information," includes additional information and recommendations.

Email Virus Checking Software

Some newer antivirus software has the ability to monitor TCP/IP traffic in order to locate email viruses. However, in some instances, this scanning will decrease the speed of the workstation upon which that antivirus program is running, as using any MAPI-compliant email system (e.g., Outlook) will cause the antivirus program to attempt to intercept viruses by monitoring TCP/IP traffic. Depending on settings for the computer and email program, monitoring the TCP/IP traffic can require a great deal of computer resources and introduce slow downs in other software. There have been reports that performing an install of Symantec AntiVirus without any of its built-in email scanners will resolve the problem.

Often, performing steps to disable active scanning will also disable active email scanning, but this is not always the case. One way to test if the antivirus program is causing the speed decrease is to temporarily disable the antivirus program. If response times improve, and the settings above have been corrected to exclude the Tabs3 Current Working Directory from continuous virus scanning, the email scanning may be causing the issue. While temporarily disabling your email integration may improve the system speed, we recommend you contact your antivirus provider to determine what options are available for email scanning.

Offline Files Not Supported

Tab3 software does not support Offline Files. If Offline Files are enabled, you must disable Offline Files before you can use the Tab3 software. Details regarding Offline Files can be found in Knowledge Base Article [R11450](#), "Offline Files Not Supported in Tab3 and PracticeMaster Software."

Starter Data

Starter data is provided with Tab3 Billing, PracticeMaster, and Tab3 General Ledger Software (GLS). During the installation process, you will be asked if you want to install a starter set of data.

We recommend installing the starter data.

Starter Data Sets simplifies the initial setup process by predefining information in various setup files such as transaction codes, categories, text macros, etc. If you select this option, a partial set of data files will be installed. If any of the data files being installed are already present, the corresponding starter data files will not be installed. These files may be modified as desired.

Tab3 Billing Starter Data

The Tab3 Billing Starter Data Set consists of the following files.

- transaction codes
- categories
- billing frequencies
- statement templates
- email templates
- text macros
- task based billing codes
- timekeeper levels
- task code set names
- cost type descriptions
- statement notes
- statement designer layouts

The **Tab3 Billing Report Pack** includes printouts of these files.

Note: The task based billing codes, task code set names, timekeeper levels, and cost types are installed even if you elect not to install the Starter Data Set (*unless the files already exist in either Tab3 Billing or PracticeMaster*).

PracticeMaster Starter Data

The PracticeMaster Starter Data Set consists of the following files.

- transaction codes
- calendar codes
- categories
- text macros
- task based billing codes

The **PracticeMaster Report Pack** includes printouts of these files. The PracticeMaster Starter Data set also includes predefined Report Writer report definitions. Area of Practice Templates are not included in the Starter Data.

GLS Starter Data

The Tab3 General Ledger (GLS) Starter Data Set consists of the following files:

- chart of accounts
- journal names
- departments

The **GLS Report Pack** includes printouts of these files.

Note: If data for the product being installed already exists, you will not be given the option to install starter data.

Note: If installing PracticeMaster over an existing Tab3 Billing installation, the mirrored data files will not be installed (i.e., categories, transaction code, text macros, task based billing codes). However, calendar codes and PracticeMaster Report Writer report definitions will be installed.

Installing the Software

Installing the software consists of two steps:

- Installing the software on the server; and
- Installing the software on each workstation that will be using the software.

Installing the Software

The software is provided via download and must be installed to a hard disk.

Note: You must have Administrator privileges when installing the software.

Platinum Note: If installing the Platinum version of the software, the software **must** be installed from the server itself.

► To install the software via Internet download

1. Go to www.tabs3.com/install.
2. Download and install the software.
3. Certain installations require an Activation Code. If an Activation Code is required, you can copy and paste it from the email your invoice was attached to.

Note: Activation Codes are valid for 30 days. Contact Tabs3 Support if you need a new Activation Code.

Note: During the installation, a file named READWSTI.HTM is installed. This file contains information regarding the software that may not appear elsewhere in the documentation.

Note: Instructions for other installation scenarios can be found on page 34.

Installing the Software on Network Workstations

Once the Tabs3 software has been installed on the file server, each workstation that will be using the software must run the **SETUP.EXE** program file located on the file server. The SETUP.EXE program on the file server is the workstation installation program. This program installs program files, help files, and desktop shortcuts onto the workstation.

Note: When running **SETUP.EXE**, you must have Administrator privileges.

► **To install the software on a workstation**

1. From the workstation, browse to the Current Working Directory on the server and run **SETUP.EXE**.
2. **SETUP.EXE** will launch a setup wizard. Follow the on-screen instructions to complete the workstation installation.
3. Repeat the above steps for each workstation that will be using the software.

Note: When running SETUP.EXE, the program will automatically change the rights in the specified local program directory to full read/write rights for all users. The SETUP.EXE does not change rights on the server.

Note: Additional information about the network installation can be found in Knowledge Base Article [R11229](#), "All About the Local Install (SETUP.EXE) and Auto Update."

Terminal Services Considerations

When running under Terminal Services or in a Citrix environment, the SETUP.EXE file will only need to be run once by a Terminal Services computer, no matter how many users log onto the workstation remotely. The following will need to be performed for each Terminal Services computer. Before running SETUP.EXE, delete any shortcuts to the Tabs3 Software programs for each user on the workstation. Once SETUP.EXE is complete, a single set of desktop shortcuts will have been created. These desktop shortcuts will need to be copied to all other users' Desktop directory, which for Terminal Services in Windows 10/8/7 is C:\users\\Desktop. (*Note: Locations may be different for Citrix*). Once the shortcuts have been copied to all other users' desktops, delete the shortcuts from the All Users directory (otherwise users will have two sets of shortcuts). Once users have their own shortcuts, they are free to add startup options as desired. Later, when the Tabs3 Software programs are updated on the server from the Web, an Administrator must open any Tabs3 Software program on the Terminal Server to update the program files on the Terminal Services computer. It is not necessary to run SETUP.EXE again, because the local program files will automatically update when the software is started.

Note: Additional information about using Tabs3 software on Terminal Services or Citrix can be found in Knowledge Base Article [R11284](#), "Using Tabs3 and PracticeMaster Software on Terminal Services or Citrix."

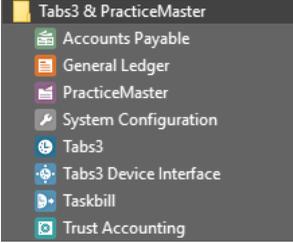
Installing Platinum

The Platinum version of the Tabs3 software requires additional configuration. The Platinum Configuration section of this document (*page 17*) provides basic information your IT person needs to know.

Starting the Software

Starting the Software

The software can be started via a shortcut icon on the Windows desktop or via the Windows taskbar. If you already have a Tab3 application started, you can launch another Tab3 application using the application toolbar.

| | | |
|----------------------------|---|---|
| Desktop Shortcut | During installation, if you elected to create icons on the desktop, you can double-click the associated desktop icon. |  |
| Windows Taskbar | The software can be started via the Windows taskbar. Click the Start button, and then point to Programs . Point to the Tab3 & PracticeMaster folder and then click the menu option for the desired software product. |  |
| Application Toolbar | The application toolbar provides the ability to quickly start other Tab3 software. Positioning the mouse over any application toolbar button will display the software associated with that button. |  |

Logon

After starting the software, the Logon dialog box will be displayed.

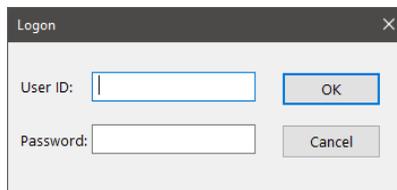


Figure 2, Logon window

When first installing the software, you can simply leave the **User ID** and **Password** fields blank and click **OK**. You can then configure users; detailed information on this process can be found in the **Administrator Guide**.

Best Practice: After users have been added to the software using System Configuration, we recommend either deleting the [BLANK] user ID, or marking it inactive.

Customization

When the software is first started, the Customization window will be displayed. Complete details regarding Customization can be found in the **Administrator Guide**. We recommend using this guide and working with the Firm Administrator to determine the desired configuration options before adding clients or other data.

Exiting the Software

To exit the software, you can use one of the following methods:

- From the **File** menu, click **Exit**
- Click the **Close** button on the titlebar



Platinum Configuration

The Platinum version of the Tab3 software has additional features. Because of the increased level of sophistication required to implement these features, additional configuration is required. This section of the guide includes information on firewalls, configuring the Platinum Server (including HotBackup), enabling Tab3 Connect, setting up the Exchange Connector, and using additional options in Platinum SQL.

Note: If you are not installing the Platinum version, skip to page 32.

More Info: Complete information regarding Platinum can be found in the *Platinum Server Guide*.

Firewall Ports

A firewall is a software program or hardware device that secures your computer by blocking incoming network communications.

Platinum Server software includes components that run on the server computer, but need to receive communications from other computers on the network. These components are STI Director and the Tab3 Billing and PracticeMaster Accelerators. For example, STI Director is assigned (by default) to port number 1779 on the server computer. Therefore, any TCP/IP communications received by the server computer with an "address" of port 1779 are immediately routed to STI Director.

It is common for a server computer to be protected by a firewall that blocks access to all but the most critical ports. Because of this, you will need to verify that the ports required by STI Director and the Tab3 Billing and PracticeMaster Accelerators are unblocked (i.e., open). These port numbers are defined in the System Configuration program, on the **Director Configuration** tab of the Platinum Server Configuration window (*Platinum | Platinum Server Configuration*).

By default, the following ports are used by the various Platinum Server components:

- Port 1779 - STI Director
- Port 1780 - Tab3 Billing Accelerator
- Port 1781 - PracticeMaster Accelerator
- Port 5807 - Platinum Server
- Port 1621 - Tab3 Connect (Outgoing only, normally open by default.)
- Port 6597 - Platinum SQL

Opening these ports will allow STI Director and the Tab3 Billing and PracticeMaster Accelerators to receive necessary communications from the workstations on the network. Additional information,

including specific information on Windows Firewall can be found in Knowledge Base Article **R11197**, "Opening Ports in Windows Firewall."

Note: These ports are automatically opened on the server when the installer creates the STI Server Service and STI Director service. This typically occurs during the initial installation or when running a software update after moving the Tab3 and PracticeMaster software to a new server. If the services are already in place, the installer will not open the ports.

Note: If your firm uses a hardware-based firewall to connect to the Internet, it is critical that you do not open these ports to Internet traffic.

Platinum Server Configuration, Including HotBackup

The Platinum Server Configuration window (**Platinum | Platinum Server Configuration**) is accessible from the System Configuration software program.

This window contains all settings related to HotBackup, STI Director, and the Tab3 Billing and PracticeMaster Accelerators. The following is a brief overview of the Platinum Server Configuration window. Detailed information regarding individual settings is available in the Help provided with the System Configuration software or the **Platinum Server Guide**.

HotBackup Schedule

The **HotBackup Schedule** tab (Figure 3) displays a list of scheduled HotBackups. It is used to create or delete scheduled HotBackups, as well as temporarily suspend scheduled HotBackups. HotBackups can be scheduled for varying times of the day on weekdays, every day of the week, or specific days of your choosing.

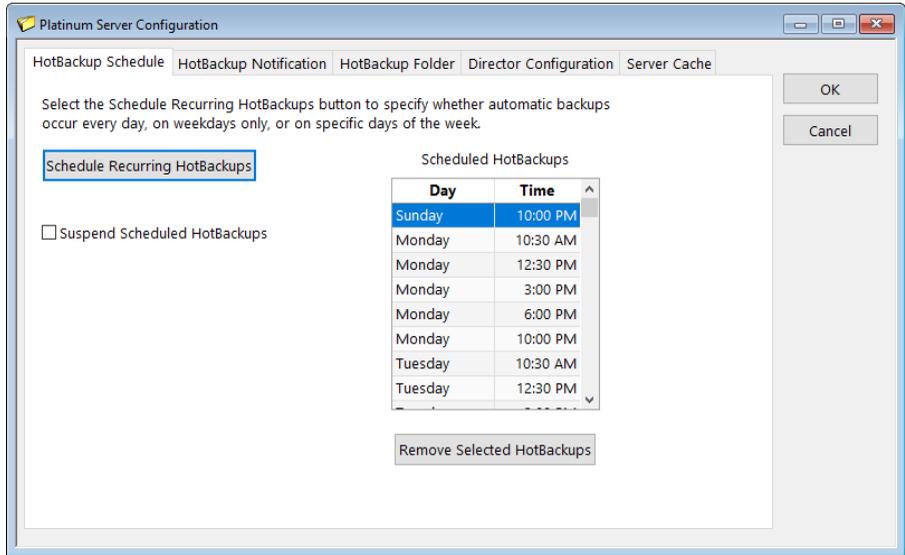


Figure 3, HotBackup Schedule tab

Schedule Recurring HotBackups

The Schedule Recurring HotBackups window (Figure 4) is used to schedule one or more HotBackups. It is accessed via the **Schedule Recurring HotBackups** button on the **HotBackup Schedule** tab (Figure 3).

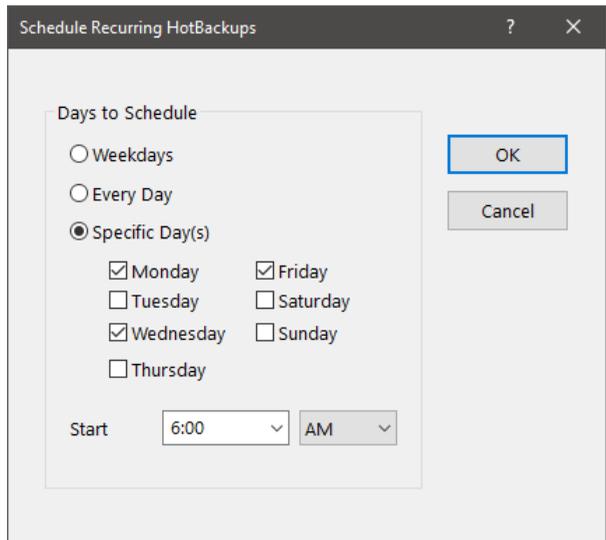


Figure 4, Schedule Recurring HotBackups

HotBackup Notification

The **HotBackup Notification** tab (Figure 5) is used to configure email messages that can be sent automatically to various recipients in the event a HotBackup fails or succeeds. Selectable variables allow unique descriptions and subject lines to be created automatically when a message is sent.

Note: Configuring email messages to notify recipients of successes and failures provides a powerful built-in safeguard feature. We recommend that at least one email message be defined for failures so that the appropriate personnel are notified in the event there are problems.

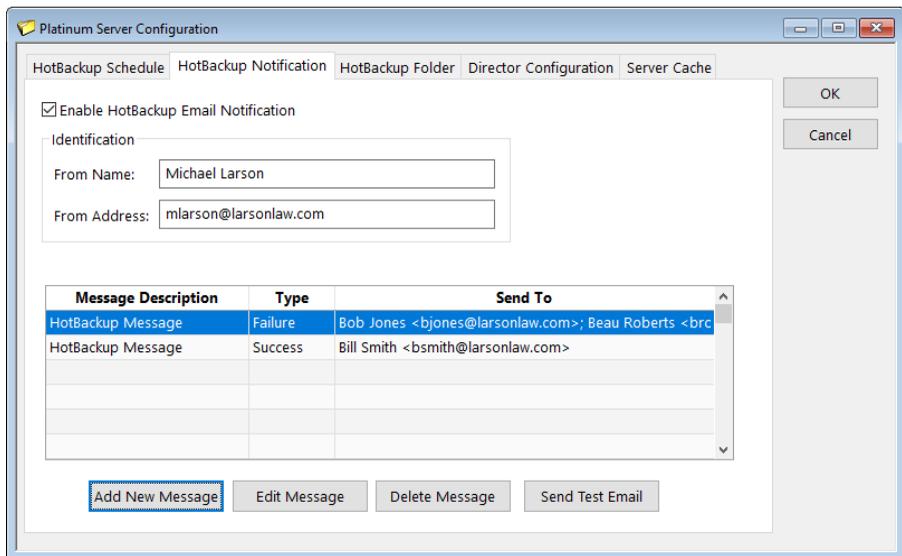


Figure 5, HotBackup Notification tab

Outgoing Email Configuration

The Outgoing Email Configuration window (**Settings | Outgoing Email Configuration**) (Figure 6) is used to configure the settings necessary to send email messages. It is accessible from the System Configuration software program.

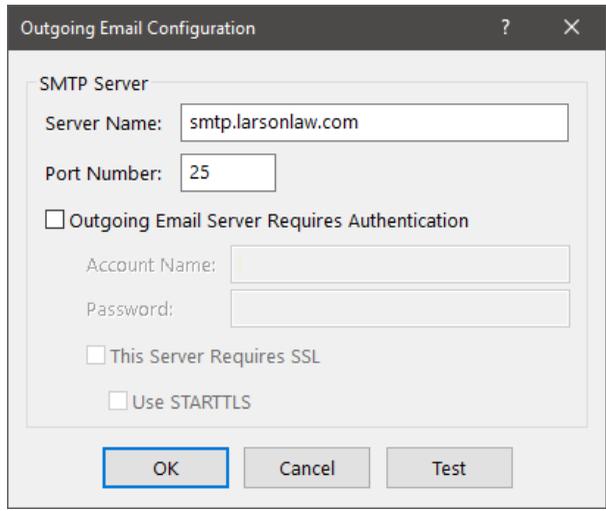


Figure 6, Outgoing Email Configuration

Notification Message

The Notification Message window (Figure 7) is used to add a new email message, or edit an existing one. It is accessed via the **Add New Message** and **Edit Message** buttons on the **HotBackup Notification** tab (Figure 5).

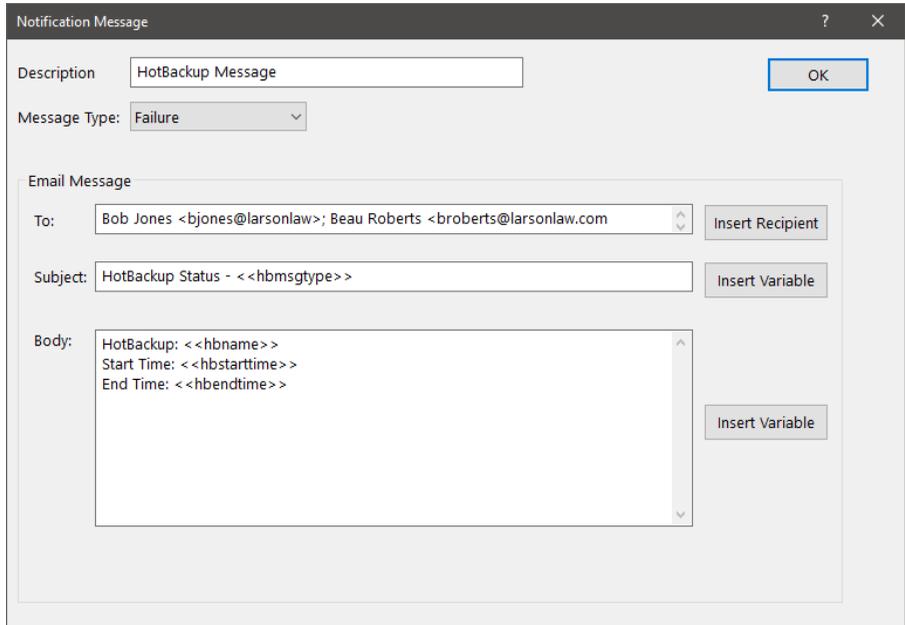


Figure 7, Notification Message

HotBackup Folder

The **HotBackup Folder** tab (Figure 8) is used to configure the location where HotBackups are stored, as well as the number of HotBackups to maintain at one time. By default, the **HotBackup Folder** is defined as "C:\HotBackup", and the **Number of Successful HotBackups to Keep** is set at 4 **Recent** and 2 **Archive** (i.e., 6 total). Valid syntax for the HotBackup Folder is:

[driveletter]:\[foldername]

Detailed information regarding these settings can be found in the Help provided with the System Configuration software. The "Directory Structure" section of the **Platinum Server Guide** also provides additional information on these settings.

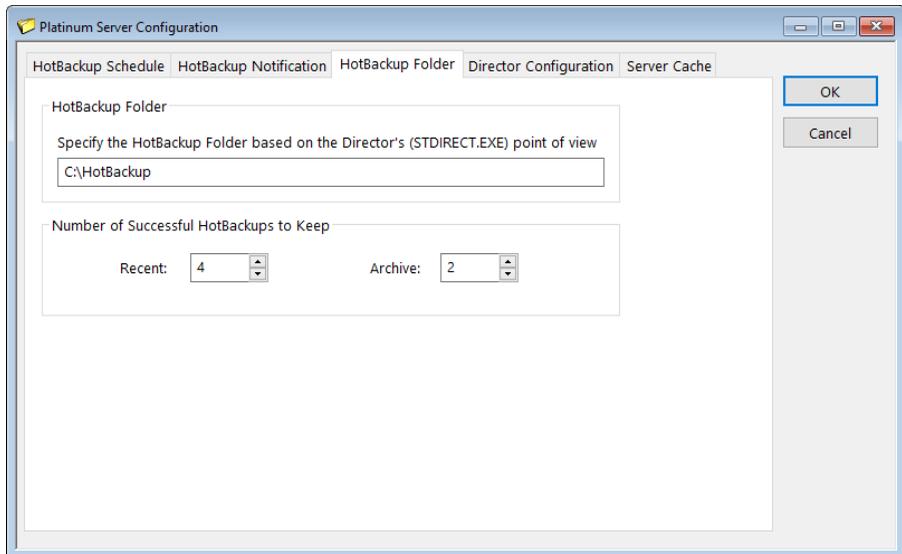


Figure 8, HotBackup Folder tab

Director Configuration

The **Director Configuration** tab (Figure 9) is used to configure various options for STI Director and the Tabs3 Billing and PracticeMaster Accelerators. The default settings are determined when the Platinum Server software is first installed.

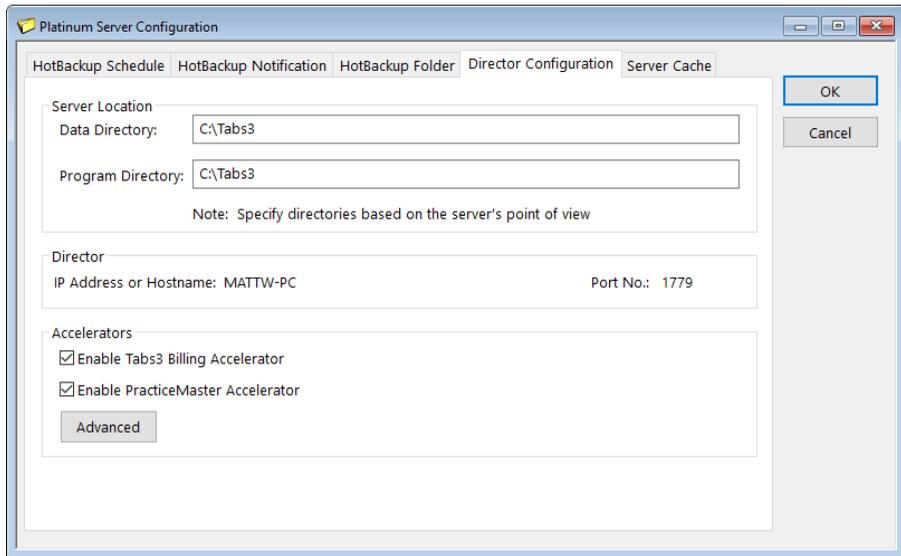


Figure 9, Director Configuration tab

Server Cache

The Server Cache tab (Figure 10) is used to determine the amount of server memory allocated to caching Tabs3 and PracticeMaster data and index files. This option should be configured as soon as possible to maximize performance. See Knowledge Base Article [R11644](#), "CTSRVR.CFG Configuration File," or the Platinum Server Guide for more information on configuring this tab.

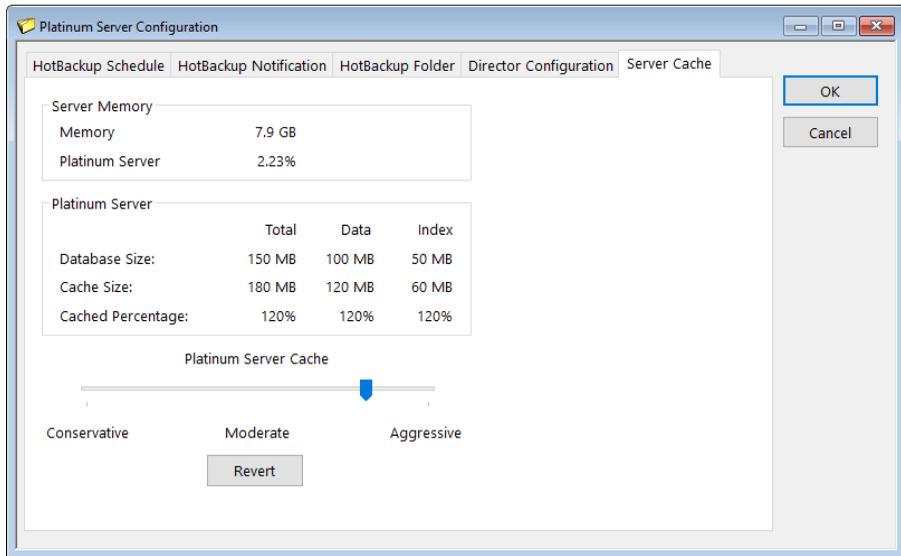


Figure 10, Server Cache tab

Configuring Tab3 Connect

Tab3 Connect is a Web-based application that allows Platinum users to sign in to an easy-to-use interface for their Tab3 and PracticeMaster data. Tab3 Connect allows touch or mouse-based interaction, and is designed to work with both handheld and tablet (or larger) screen formats. The Tab3 Connect program (T3CONNECT.EXE) runs on your server and registers your users with the Tab3 Connect site. More information regarding Tab3 Connect can be found in Knowledge Base Article [R11480](#), "All About Tab3 Connect."

Tab3 Connect must be configured to allow users to log in to the Tab3 Connect Web application. Configuration consists of the following three steps:

- Enabling Tab3 Connect for the Firm
- Configuring Access Profiles to Administer Tab3 Connect Users
- Configuring Users to Access Tab3 Connect

Tab3 Connect Subscription Note: If you will be accessing Tab3 Connect using a Tab3 Connect Billing license, PracticeMaster Basic must be installed and configured prior to enabling Tab3 Connect. Knowledge Base Article [R11027](#), "Installing the Try Before You Buy PracticeMaster License," includes step-by-step instructions for installing and configuring PracticeMaster Basic. From the **Help** menu, select **Check for Updates** to download the most recent software update.

► **To enable Tab3 Connect for the Firm**

1. Start System Configuration.
2. From the **Platinum** menu, select **Tab3 Connect Administration**.
3. Select the **Allow connections via Tab3 Connect** check box.
4. Specify the timeout value in the **Automatically log users off after XX minutes of inactivity** field (default is 10 minutes).
5. In the **Notices** section, enter the **Email Address** where you want important email messages sent regarding Tab3 Connect including downtime periods, maintenance expiration, and other important communications. A valid email address is required.

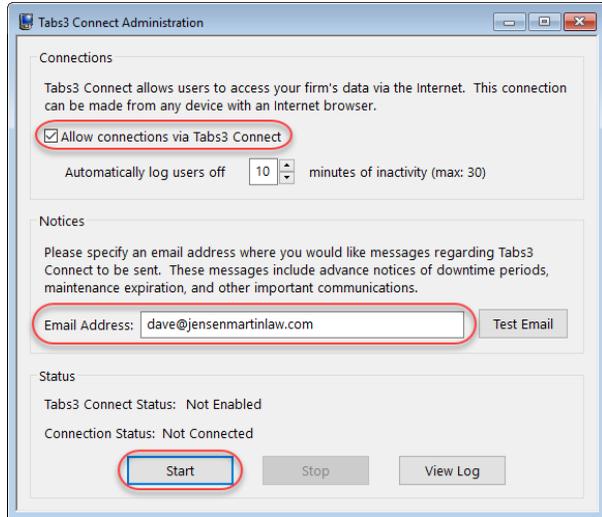


Figure 11, Tab3 Connect Administration window

- a. Press Ctrl+S to save your changes.
 - b. Click the **Test Email** button. A message will be displayed stating, "You should receive an email from Tab3 Connect shortly."
 - c. Verify the email message was received by the designated recipient.
6. Click the **Start** button to start Tab3 Connect. Tab3 Connect is ready to use once the status indicators change as follows:
 - **Tab3 Connect Status:** *Running*
 - **Connection Status:** *Connected*
7. Close the window.

Firewall Note: Depending on your settings, you may need to configure your network so that outgoing connections via port 1621 are not blocked by a firewall. By default, most firewall settings do not block outgoing connections; therefore, most firms do not need to make any firewall changes. However, if port 1621 is blocked to outgoing connections, it must be opened to permit communications between the server and client software. KB Article **R11197**, "Opening Ports in Windows Firewall," discusses firewalls and provides steps for checking and modifying the firewall settings for those firms whose servers use the Windows Firewall.

► **To configure access profile(s) to administer Tab3 Connect users**

1. Start System Configuration.
2. From the **File** menu, point to **Open** and then select **Access Profile**.
3. Select the **Access ID** to which you will grant rights to administer Tab3 Connect users.

4. Under **System Configuration Access**, select the **Tab3 Connect Access and Settings** check box.
5. Press Ctrl+S to save the Access Profile.

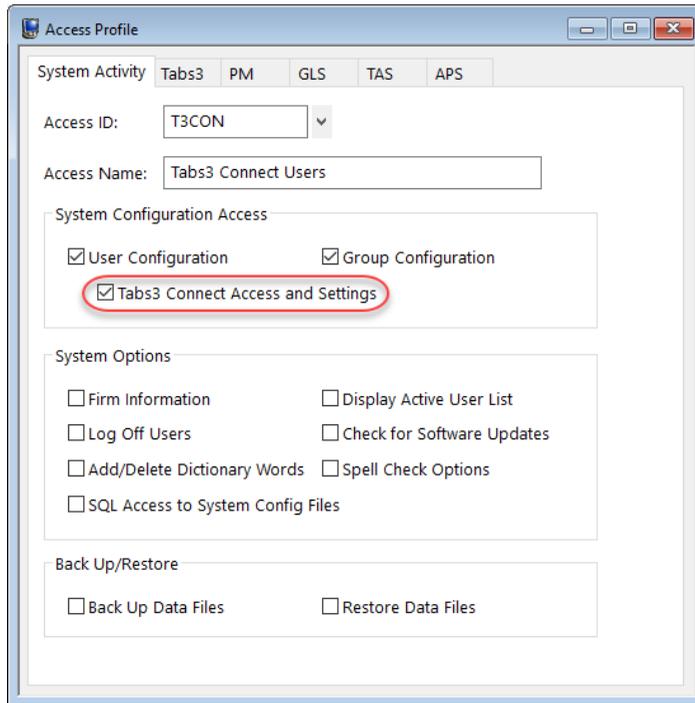


Figure 12, Access Profile window

Note: The above procedure is not used to grant users access to Tab3 Connect, but is used to designate which users have rights to change the Tab3 Connect settings on behalf of users (themselves or others).

► **To configure users to access Tab3 Connect**

1. Start System Configuration.
2. From the **File** menu, point to **Open** and then select **Users** (Figure 13).
3. Select the **User ID** that will be accessing Tab3 Connect.
4. Verify that the user has a valid **Email Address** configured. (*Note: This field is required.*)
5. In the **Options** section, select **Allow access via Tab3 Connect**.
6. Click the **Tab3 Connect Settings** button and enter the following information in the Tab3 Connect Settings window (Figure 14):
 - a. In the **Feature Access** section, specify whether the user will access Tab3 Connect using **Billing and PracticeMaster** features or just **Billing** features. If your license is for

- PracticeMaster only features, you must select the Billing and PracticeMaster option. See Knowledge Base Article [R11480](#), "All About Tab3 Connect," for information on the differences between Billing and PracticeMaster, and Billing access levels.
- b. Enter a strong password in the **Password** and **Confirm Password** fields. The password must be at least 8 characters and it must have at least one capital letter, one lowercase letter, and one number.
 - c. Select the **Fee Timekeeper** for which new fees will be assigned while logged in to Tab3 Connect. *(Note: Users who are assigned to one or more Tab3 Billing and PracticeMaster Timekeepers must select one of those timekeepers as their Fee Timekeeper.)*
 - d. Optionally select to **Hide Timekeeper Field On Form**. When selected, users will only be able to see fee and cost transactions for the Fee Timekeeper assigned. When cleared, the Timekeeper field will be available on the Fee and Cost entry windows in Tab3 Connect, and the user can select a timekeeper for each fee or cost transaction, or when viewing a list. Users who can see the timekeeper field will also be able to see other timekeepers' transactions (if the user has View Fee Rate and Amount access rights, this includes other timekeepers' billing rates). See Knowledge Base Article [R11818](#), "Access Rights," for more information about access rights in the software. *(Note: Users who are assigned to one or more Tab3 and PracticeMaster Timekeepers will only be able to select one of those timekeepers for fee or cost transactions or when viewing a list.)*
 - e. Select the **Default Start Page** for using Tab3 Connect. For example, some users may prefer to always start Tab3 Connect with the Home page, while others may prefer to start with the Matter Manager page.
 - f. Select the preferred **Text Macro Default** setting. This setting determines the default behavior when accessing Tab3 Connect. Text Macros can be toggled on and off during the session according to the user's preference. See Knowledge Base Article [R11682](#), "Using Text Macros in Tab3 Connect," for more information.
7. Click **OK**.
 8. Press Ctrl+S to save the changes to the user record.
 9. Repeat steps 3-8 for each user who requires access to Tab3 Connect.
 10. Next, if using PracticeMaster, you may want to grant rights for downloading files via Tab3 Connect. This right is granted using the access profile. You may want to add a new access profile or grant the right to one or more existing access profiles. To grant the right to an existing access profile:
 - a. From the **File** menu, point to **Open** and then select **Access Profile**.
 - b. Select the **Access ID** to which you will grant rights for users to download files from Tab3 Connect.
 - c. Click the **PM** tab (Figure 15).
 - d. In the **File Information** section, select the **Download Files via Tab3 Connect** function.

- e. In the **Selected Functions** section, click **Allow**.
- f. Press Ctrl+S to save the Access Profile.

Note: The number of users that can be configured for Tab3 Connect access is limited to the number of users for your PracticeMaster license plus the number of users for your Tab3 Connect Billing license. More information on Tab3 Connect licensing can be found in Knowledge Base Article **R11480**, "All About Tab3 Connect." If you need additional user licenses, please contact your Tab3 Software consultant, or our Sales Department at (402) 419-2200.

User Configuration

Logon Information
 User ID: DAN Logon User
 Password: Inactive
 Confirm Password:

User Information
 User Name: Daniel H. Brady
 Initials: DHB
 Phone Number:
 Fax Number:
 Email Address: dbrady@jensenmartinlaw.com

Options
 Colors used for PracticeMaster Calendar entries: User Text Color
 Set/view calendar access rights for this user:
 Disable Autofill for all lookup fields
 Allow CompuLaw Dates to be generated for this user in PracticeMaster
 Allow access via Tab3 Connect

Currently Assigned Access Profiles (max 5):

| Access ID | Access Name |
|---|------------------------------|
| <input checked="" type="checkbox"/> MANAGER | (All Rights to All Programs) |
| <input checked="" type="checkbox"/> APGL | APS/GLS/TAS usage |
| <input checked="" type="checkbox"/> BILLING | Billing |
| <input type="checkbox"/> CALRULES | CalRules Test |

Assign Tab3/PracticeMaster Timekeepers

Figure 13, User Configuration window

Tab3 Connect Settings

Feature Access
 Billing and PracticeMaster
 Billing

Login Address: dbrady@jensenmartinlaw.com
 Password:
 Confirm Password:

Fee Timekeeper: 6 Daniel H. Brady
 Hide Timekeeper Field On Form

Default Start Page: Matter Manager
 Text Macros Default: On

Figure 14, Tab3 Connect Settings window

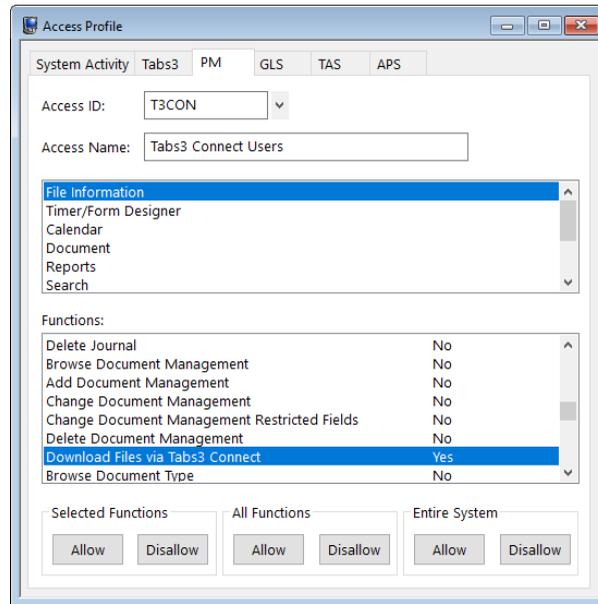


Figure 15, Download Files via Tabs3 Connect Access Right

Configuring the Exchange Connector

When your firm is configured to synchronize PracticeMaster and Outlook using an Exchange server, enabling the PracticeMaster Exchange Connector creates a direct link between the Platinum server and the Exchange server. This feature has several benefits, including:

- PracticeMaster and Outlook stay synchronized, even when PracticeMaster is not open on your workstation.
- Only one “administrative” Exchange user needs access rights to other users, thus eliminating the need to assign Editor rights to all users.
- Periodic synchronization occurs on the server, thereby reducing network traffic.
- The Exchange Connector performs a single periodic synchronization for all users, ensuring that everyone is up-to-date.
- Access rights to users’ Exchange folders are automatically assigned to the “administrative” user as they log into PracticeMaster.
- Only requires that PracticeMaster be running on one computer in the office for synchronization to occur for all users.

Detailed instructions for configuring the Exchange Connector can be found in Knowledge Base Article [R11596](#), “Configuring the PracticeMaster Platinum Exchange Connector.”

Configuring Platinum SQL

Platinum SQL includes two additional features that require configuration:

- Data Encryption
- SQL access via ODBC

Data Encryption

The Platinum SQL Data Encryption utility is used to encrypt Tab3 and PracticeMaster data files that may contain sensitive information. Once data files are encrypted, they can only be read by the Tab3 and PracticeMaster Platinum SQL software. You can determine the current encryption status of the software by checking the Data Encryption field of the **Help | About** window. See Knowledge Base Article [R11822](#), "Information in the Help | About Window," for more information.

See Knowledge Base Article [R11660](#), "Platinum SQL Data Encryption," for more information on the Platinum SQL Data Encryption feature, including steps for enabling or disabling encryption.

ODBC Access

Platinum SQL software includes an SQL ODBC driver. This driver allows a variety of third-party programs, such as Microsoft Access or Crystal Reports, to query the Tab3 and PracticeMaster database. The Platinum SQL ODBC driver has the following advantages:

Accelerated SQL Processing

Platinum SQL provides significantly faster reports when using ODBC-capable software. The standard ODBC driver for Tab3 software processes all queries at the workstation, meaning that all of the data is sent to the workstation via the network and then filtered based on the query. With Platinum SQL, all queries are processed at the server, and only the results are returned over the network, improving performance and reducing network load.

64- & 32-bit Access

The SQL ODBC driver included with the Platinum SQL software is available in both 64-bit and 32-bit versions. This allows you to access the Tab3 Billing and PracticeMaster database from 64-bit and 32-bit programs. Users with 64-bit workstations can install both drivers, and will only need to configure the ODBC data source once.

Firm-wide License Included

The license for the standard ODBC driver is purchased per workstation. The ODBC driver included with the Platinum SQL software is licensed for use by the entire firm. The ODBC SQL driver is included at no extra charge.

Microsoft SQL Server Access via OLE DB

Platinum SQL supports OLE DB access. In addition to standard ODBC access, Tabs3 Billing and PracticeMaster data is also accessible from OLE DB compatible software using the Microsoft OLE DB Provider for ODBC. This includes Microsoft SQL Server software.

For information on installing the ODBC drivers and configuring Platinum SQL for ODBC access, see KB Article [**R11397**](#), "Working with Platinum SQL ODBC Drivers," or the "Using Platinum SQL ODBC Features" section of the [**Platinum Server Guide**](#).

Other IT Considerations

Your IT professional or office manager should be aware of the following information.

Backup Best Practices

Tab3 software includes a built-in backup feature. In addition to using the built-in backup, it is important that you implement another backup method. A thorough discussion of the backup options can be found in Knowledge Base Article [R11213](#), "Backup Strategy."

Power Management Settings

Certain power management features on computers have been known to cause problems on servers or computers and can cause lost connections. Review your power management settings for the server and all workstations that use Tab3 software, and make sure they are set to **Never Sleep**. When a computer goes into Sleep Mode, the connection to the server may be lost. This may result in the user remaining logged in, and thus requiring a reset. Additional information regarding power management settings can be found in Knowledge Base Article [R10339](#), "Power Management Issues with Tab3 and PracticeMaster Software Products."

NIC Drivers

Network Interface Cards (NIC) can cause problems if the most current drivers are not installed. Always make sure the latest NIC driver is being used. Current drivers are typically available from the manufacturer of your NIC. Knowledge Base Article [R10184](#), "Network Troubleshooting Guide," discusses these problems and others in depth.

VSS - Volume Shadow Copy Service

Volume Shadow Copy Service (VSS) can be used to back up Tab3 and PracticeMaster Platinum software. Complete details can be found in Knowledge Base Article [R11430](#), "Using Volume Shadow Copy Service (VSS) to Back Up Tab3 and PracticeMaster Software."

Network Test Utility

If you are having problems with errors, lockups or data corruption on your network, a Network Test utility is built into the software and can be accessed via the **Help | Diagnostics** menu. This utility can be used to test for basic network reliability. Knowledge Base Article [R11304](#), "All About Network Test," provides details regarding this utility program.

Network Troubleshooting Guide

It can be difficult to diagnose network problems. Knowledge Base Article **R10184**, "Network Troubleshooting Guide," contains information that can be used to help diagnose a problem more efficiently with regards to using Tabs3 software in a networking environment.

Security

Tabs3 software offers multiple layers of security, thus allowing you maximum flexibility when assigning which users have access to information. An overview of the various security features can be found in the **Administrator Guide** and in Help.

Other Installation Scenarios

This section includes information on other installation scenarios that may occur after the initial installation.

Updating the Software

Periodically, updated versions of the software are posted on our download site on the Internet. These updates are available to firms who are on maintenance. We will notify firms when there is a new version of the software. Alternatively, users can check for updates via the **Help | Check for Updates** menu option. Once downloaded, follow the on-screen instructions to install the updated software. See Knowledge Base Article [R11804](#), "Keeping Tab3 Software Up To Date," for additional information on the update process.

Once the software is installed on the server, the next time each workstation starts the software, the software will automatically update the program files from the server onto the workstation.

You can read more about Tab3's automatic update notification process in Knowledge Base Article [R11539](#), "Tab3 Software Update Notification."

Platinum Note: Not all updates require being installed at the server. You will be informed if a particular update requires that it be installed from the server.

Reinstalling the Software

All Tab3 software is licensed and is provided with a serial number. You may need to reinstall the software due to an upgrade, software license transfer, firm name change, etc.

Step-by-step procedures for reinstalling the software can be found in Knowledge Base Article [R11573](#), "How to Reinstall Tab3 Software."

Tab3 Remote & Cost Recovery Interface Integration Note: If you are reinstalling Tab3 software due to an upgrade, software license transfer, firm name change, etc. (i.e., you have a new Tab3 Billing serial number), make sure you merge any remote data files, cost recovery system data files, and handheld integration files **before** reinstalling Tab3. Otherwise the previously entered information cannot be imported. See Knowledge Base Article [R10393](#), "Tab3 Remote Entry Software Information," for details on using Tab3 Remote.

Terminal Services/Citrix Note: The SETUP.EXE file will only need to be run once by a Terminal Services computer, no matter how many users log onto the workstation remotely. Details on this process for Terminal Services/Citrix workstations can be found on page 14 as well as in Knowledge Base Article [R11284](#), "Using Tab3 Software on Terminal Services or Citrix."

Converting the Software

When updating to a new version, a conversion is generally required. Although you will be provided with step-by-step instructions when converting to a newer version, detailed instructions for converting from older versions can also be found in our Knowledge Base at support.Tab3.com/main/convmain.htm.

Additionally, you can find links to more conversion materials for Version 2020 in Knowledge Base Article [R11814](#), "Version 2020 Information & Resources."

Installing Full Software for Use with Trial Software Data

Many firms use the Trial Software to store live data in order to evaluate the products in a realistic setting. Once you purchase the Tab3 software license, you may want to use the data you have already entered to save time. By default, the installation program will prevent you from installing the full version over an existing Trial Software installation. However, you can use the procedures provided in Knowledge Base Article [R10341](#), "Trial Software Information," to install the full software while retaining your existing data.

Moving the Software to a New Computer

If you need to move the Tab3 software from one computer to another computer, use the procedures in the following Knowledge Base Articles:

- [R10838](#) - Moving Tab3 Software
- [R11624](#) - Moving Tab3 Platinum Software

Uninstalling the Software

If you want to remove the software from the hard drive, use the following procedures:

► **To remove the software**

1. From the Control Panel, select **Add/Remove Programs**.
2. Select **Tab3/PracticeMaster Local Installation**, **Tab3/PracticeMaster Programs** or **Tab3/PracticeMaster Icons**, whichever is present. Selecting **Tab3/PracticeMaster Programs** will remove the program files but not the data files. Selecting **Tab3/PracticeMaster Icons** will remove the shortcuts only.
3. Follow the on-screen instructions.

Note: The data files are not deleted. This is by design. You can manually delete these files after uninstalling the programs using Windows Explorer. Data files are located in the program folder specified when the software was installed. If you are not sure where this is located, you can start the software and select **Help | About**, which will show the Current Working Directory. You can also open the Current Working Directory in Windows Explorer by clicking the **Open CWD** button in the **Help | About** window. If the software has already been uninstalled, you can search for STUSER.DAT on the hard drive in order to locate the remaining data files. Additional details regarding uninstalling the software can be found in Knowledge Base Article [R11776](#), "Uninstalling Tab3 Software."

Frequently Asked Questions

The following questions and answers are provided to help facilitate a successful implementation and installation of the software.

Will the software run under Windows 10, Windows 8, and Windows 7?

Yes. Tab3 software will run under Windows 10, Windows 8, and Windows 7. When running as a Windows 10/8/7 stand-alone system or as a Windows 10/8/7 workstation that connects to a Microsoft Windows Server 2019/2016/2012/2008 R2 (either 32-bit or 64-bit), all functions can be run with UAC enabled. Additional information is provided in Knowledge Base Article [R11238](#), "How Microsoft Windows Interacts with Tab3 and PracticeMaster Software."

Will the software run under Windows Small Business Server?

Yes. Tab3 software will run under Windows Small Business Server 2011. However, installing the Tab3 software database on a domain controller may require special IT consideration due to potential performance issues. Windows Server Essentials/Small Business Servers are always domain controllers, and any Windows server can be configured as a domain controller. Additional information can be found in the "Using a Domain Controller as the Tab3 Server" section of Knowledge Base Article [R11637](#), "Network Performance Guide."

How can I tell which version of Windows I am running?

You can press the *Windows + Pause/Break* keys together, or you can right-click the **Computer, My Computer**, or **This PC** icon on your desktop and select **Properties**.

We are running on a network and intend to have multiple workstations use the software. What is the installation procedure?

Be sure to use the instructions provided in this guide for complete details. To summarize, however, you first install the software onto the server. Once the software is installed onto the server, you then run the SETUP program off of the server's hard drive from each workstation that will be accessing the software.

How long does it take to install the software?

Installing the software onto the server takes less than 15 minutes. Allow approximately 5-10 minutes additional installation time for each workstation.

We know about the Guides, Help and Knowledge Base. Is there any other documentation provided that we should be aware of?

Yes. There are several other documents we provide that you may be interested in.

Training Videos are available for Tab3 Billing and PracticeMaster. They consist of videos with sound that are ideal for introducing unfamiliar features as well as providing training for new personnel. The Training Videos can be opened from within the software (**Help | Training Videos**), accessed via the software's Help, or from the Web at [**Tab3.com/video**](http://Tab3.com/video).

Quick Guides are available for various PracticeMaster features. Quick Guides are short documents that introduce features by focusing on what you need to know to get started. These Quick Guides provide a useful alternative for users who need to start using the software right away with a minimal amount of instruction or training. They are ideal for attorneys to use as an introduction to the most commonly used features in PracticeMaster. Quick Guides are provided as PDF files and can be accessed from within the PracticeMaster software (**Help | Documentation**) or via Knowledge Base Article [**R11130**](#), "PracticeMaster Quick Guides."

Report Packs contain examples and detailed information regarding each report in the software. Each report is broken down by field to explain exactly how the information is represented. Each report consists of three sections: a sample report, the description of the report, and field definitions.

A monthly Newsletter is available that includes timely articles along with questions and answers about the software. The easiest way to access the Newsletter is from within the software menu via **Help | Internet Resources | User Newsletter** or via [**http://newsletter.tab3.com**](http://newsletter.tab3.com).

A "ReadMe" (READWSTI.HTM) file is provided with the software that contains late breaking information that may not be available in other documentation.

Will our antivirus software cause any problems with the software?

We recommend excluding the directories where the Tab3 software is installed from continuous virus scanning in order to optimize performance and eliminate the potential for runtime errors (page 8). Additional information about configuring antivirus software can be found in Knowledge Base Article [**R10760**](#), "Antivirus Software Information."

Do we need any special rights to install the software?

Yes. You must have Administrator privileges when installing the software or running the SETUP.EXE program for workstations. Additional details can be found in Knowledge Base Article [**R11434**](#), "User Rights Needed to Install and Use Tab3 and PracticeMaster Software."

Do we need any special rights to run the software?

Yes. All users must have all rights to the program and data directories. Additional details can be found in Knowledge Base Article [R11434](#), "User Rights Needed to Install and Use Tab3 and PracticeMaster Software."

Do we need any special rights to use PracticeMaster?

Certain settings are written to the Windows registry for several PracticeMaster features. Therefore, in order to successfully install and use these PracticeMaster features, they must be installed by a user who has Administrator credentials. If you are running the software without these credentials, you will be asked to enter them at the time they are required. These features include: Outlook Plug-in for email integration, Internet Explorer Plug-in, Word Plug-in, Excel Plug-in, PowerPoint Plug-in, Adobe Plug-in, WordPerfect Plug-in, HotDocs Document Assembly Plug-in, Word Document Assembly Plug-in, Worldox Plug-in, Windows Explorer Plug-in, and ScanSnap.

Do we need to configure anything for printing?

You can print to any Windows printer that is available on your computer. You can specify which font you want used (**File | Print Setup**). An **Advanced Printing Features** button in Print Setup lets you configure more advanced settings such as whether you want to use footers, commas, gray shading, gray text and lines, red text, and other printing options. Some firms will configure different printers if they will be using different fonts or settings for statements or checks. Knowledge Base Article [R10776](#), "How to Set up Separate Printer Configurations for the Same Printer," contains details regarding when you might want to do this and detailed procedures for setting up separate printer configurations for the various versions of Windows.

What if I have problems installing the software?

Information on how to troubleshoot installations can be found in Knowledge Base Article [R11277](#), "Troubleshooting Tab3 and PracticeMaster Installations." If this article does not resolve your problem, call our Tab3 Support Department at (402) 419-2210.

We have been using the trial version of Tab3 and recently purchased the software. We want to use the data that we created during the trial period with our full-user version. How can we do this?

Procedures to use data entered in the trial version can be found in Knowledge Base Article [R10341](#), "Trial Software Information."

We have been using Tab3 for some time and have just purchased PracticeMaster. Is there anything we need to know regarding the installation of PracticeMaster?

Make sure all users are out of Tab3 Billing when PracticeMaster is installed. Also, when asked if you want to install starter data during the installation process, select **Yes** so the calendar codes and report writer definitions are installed.

After installing the software on the server, you can run the SETUP.EXE program located on the server from the other workstations to create PracticeMaster desktop shortcuts.

Once PracticeMaster has been installed, start it up. The Customization window will be displayed. Save the default customization settings. Then run the "Synchronize PM & Tab3/TAS" program in PracticeMaster to synchronize your Tab3 Billing data to PracticeMaster.

While working in the software, I received a message indicating that system activity information had been reset. When I clicked the OK button, the program automatically closed. Why?

Someone reset your User ID while you were actively using the software. Knowledge Base Article [R10789](#), "Resetting Users," discusses when it is, and when isn't appropriate to reset users, and why this can cause a problem. It is very important that all users in the firm be educated regarding the unnecessary issues that can occur when users are reset while they are still in the software.

We have several employees who want to integrate PracticeMaster with their smartphones. What do you recommend?

Users of Tab3 Billing and PracticeMaster Platinum can access their data from anywhere they can access the Internet using Tab3 Connect. Tab3 Connect is a Web-based application that allows users to sign in to an easy-to-use interface for their Tab3 and PracticeMaster data. Tab3 Connect allows touch or mouse-based interaction, and is designed to work with both handheld and tablet (or larger) screen formats. See Knowledge Base Article [R11480](#), "All About Tab3 Connect," for more information.

Additionally, PracticeMaster has the ability to integrate with smartphones via Microsoft Outlook. Contacts and calendar records can be synchronized using the Outlook Integration feature. See Knowledge Base Article [R11734](#), "Integration between PracticeMaster and Mobile Devices through Outlook," for more information.

What is the Platinum version of the software?

Tab3 and PracticeMaster Platinum are the top of the line products offered by Software Technology, LLC. These programs utilize state of the art database technology to ensure the

fastest performance and lowest network impact possible. They also include advanced reporting options, administrative tools, and mobile access to your Tabs3 and PracticeMaster data. Auto-Recovery, HotBackup, Accelerators, and the Log Off Users features all work together to enhance the overall usability, performance, and reliability of the software. Tabs3 Connect provides access to Tabs3 and PracticeMaster anywhere you can connect to the Internet. PracticeMaster Platinum also includes eNote, an intra-office messaging feature, and an Exchange Connector, which allows you to synchronize PracticeMaster calendars and contacts with Outlook via Microsoft Exchange without logging into PracticeMaster. As your firm grows, Platinum will scale with you, limiting degradation in performance caused by processing increasing amounts of data.

For more information on the Platinum version of the software, contact the consultant from which you purchased the software, or our Sales Department at (402) 419-2200. Additional information can be found in Knowledge Base Article [R11379](#), "Platinum Software Overview."

What's Next

Once the software is installed, use the ***Administrator Guide*** to configure the software.

Resources

The best resource for the software is using F1 or the **Help** menu while in the software.

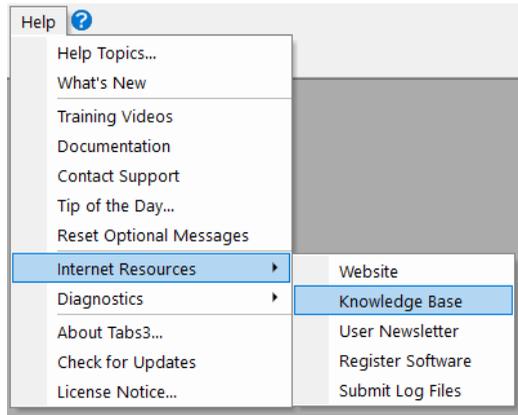


Figure 16, Help menu

The following table includes other available resources:

| Resource | Location |
|------------------------|---|
| Guides | Help Documentation ...Or... Tabs3.com/docs ...Or... Tabs3.com/support/docs.html |
| Knowledge Base | Help Internet Resources Knowledge Base ...Or... support.Tabs3.com |
| Training Videos | Help Training Videos ...Or... Tabs3.com/video |
| Help Resources | R11194 - Help Resources: How to Find It |
| Tab3 Support | (402) 419-2210 |
| Sales | (402) 419-2200 |

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