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System Configuration Report Pack

Tabs3 Billing PracticeMaster Trust Accounting Accounts Payable General Ledger

TABS3.COM

System Configuration Report Pack

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List of Reports

Access Profile List

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		Software Access					System Configuration Access											
Access ID	**Name**	**T3**	**PM**	**GL**	**TR**	**AP**	**User**	**Group**	**Connect**	**Firm**	**Active**	**Log Off**	**Updates**	**Dict Words**	**Dict Opt**	**Back Up**	**Restore**	**Portal**
APGL	AP/GL/Trust Usage	Y	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N	N	Y	Y	N
BILLING	Billing	Y	Y	N	N	N	Y	Y	N	Y	Y	N	N	Y	Y	Y	Y	Y
DATA	Tabs3 Billing Data Entry	Y	Y	N	N	N	Y	Y	N	N	N	N	N	N	Y	Y	N	Y
PMDATA	Limited PracticeMaster Usage	N	Y	N	N	N	Y	Y	N	N	N	N	N	N	Y	N	N	N
PMONLY	PM only	N	Y	N	N	N	Y	Y	N	N	N	N	N	Y	Y	N	N	N
SUPERVIS	Supervisor Access	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	N	N	Y	Y	N	N	Y

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		Software Access					System Configuration Access											
Access ID	**Name**	**T3**	**PM**	**GL**	**TR**	**AP**	**User**	**Group**	**Connect**	**Firm**	**Active**	**Log Off**	**Updates**	**Dict Words**	**Dict Opt**	**Back Up**	**Restore**	**Portal**
SUPERVIS	Supervisor Access	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	N	N	Y	Y	N	N	Y

Tabs3 Billing Access Rights

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25
1)	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y												
2)	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
3)	Y	Y	Y	Y	Y	Y	Y	Y	Y																
4)	Y	Y	Y	Y	Y	Y	Y																		
5)	Y	Y	Y	Y	Y	Y	N	Y																	
6)	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y				
7)	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y												
8)	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y											
9)	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y												
10)	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y										
11)	Y	Y	Y	Y																					
12)	Y	Y	Y	Y	Y	Y	Y	Y																	
13)	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y														
14)	Y	Y	Y	Y	Y	Y	N																		

PracticeMaster Access Rights

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33
1)	Y	Y	Y	N	Y	Y	Y	Y	N	Y	Y	Y	Y	N	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	N
2)	Y	Y	Y																														
3)	Y	Y	Y	Y	Y	Y	Y	Y	Y																								
4)	Y	Y	Y	Y	N	N																											
5)	Y	Y	Y	Y	N																												
6)	Y	N	Y	Y																													
7)	N	N	N	N	N	N																											
8)	Y	N	Y	Y	Y	Y	N	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	N	N								
9)	Y	Y	Y	Y	Y	N																											
10)	Y	Y	Y	Y	Y	N																											

	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65
1)	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	N	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	N	Y	Y

GL Access Rights

	1	2	3	4	5	6	7	8	9	10	11	12	13	14
1)	Y	Y	Y	Y	Y	Y								
2)	Y	Y	Y	Y	N									
3)	Y	Y	Y	Y	Y	Y								
4)	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
5)	Y	Y	Y	Y	Y	Y								
6)	Y	Y	Y	Y	Y	Y	Y	Y	Y					

Trust Access Rights

	1	2	3	4	5	6	7	8	9	10	11
1)	Y	Y	Y	Y	Y	Y	Y	Y			
2)	Y	Y	Y	Y							
3)	Y	Y	Y	Y	Y	Y					
4)	Y	Y	Y	Y	Y	Y	Y				
5)	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y
6)	Y	Y	Y	Y	Y	Y					
7)	Y	Y	Y	Y	Y						

AP Access Rights

	1	2	3	4	5	6	7	8	9	10	11	12	13
1)	Y	Y	Y	Y	Y	Y	Y	N					
2)	Y	Y	Y	Y									
3)	Y	Y	Y	Y									
4)	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
5)	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
6)	Y	Y	Y	Y	Y								
7)	Y	Y	Y	Y	Y								

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Access ID	Name	Software Access T3	PM	GL	TR	AP	System Configuration Access User	Group	Connect	Firm	Active	Log Off	Updates	Dict Words	Dict Opt	Back Up	Restore	Portal
SUPERVIS	Supervisor Access	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	N	N	Y	Y	N	N	Y

Trust Access Rights

	1	2	3	4	5	6	7	8	9	10	11
1)	Y	Y	Y	Y	Y	Y	Y	Y			
2)	Y	Y	Y	Y							
3)	Y	Y	Y	Y	Y	Y					
4)	Y	Y	Y	Y	Y	Y	Y				
5)	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y
6)	Y	Y	Y	Y	Y	Y					
7)	Y	Y	Y	Y	Y						

1) Trust Account Information
* 1) Browse Trust Accounts
* 2) Add Trust Accounts
* 3) Change Trust Accounts
* 4) Delete Trust Accounts
* 5) Browse Contact
* 6) Add Contact
* 7) Change Contact
* 8) Delete Contact

2) Trust Account Information
* 1) Browse Trust Transactions
* 2) Add Trust Transactions
* 3) Change Trust Transactionss
* 4) Delete Trust Transactions

3) Attorney, Payee & Bank Account Information
* 1) Edit Attorney
* 2) Browse Attorney
* 3) Edit Payee
* 4) Browse Payee
* 5) Edit Bank Account
* 6) Browse Bank Account

4) Checks
* 1) Print Checks
* 2) Check Register by Check Number
* 3) Check Register by Payee
* 4) Check Register by Trust Account
* 5) Positive Pay Export
* 6) Void Checks
* 7) Reconciliation

5) Reports
* 1) Client Trust Ledger
  2) Credit Card Authorization List
* 3) Attorney List
* 4) Bank Account List
* 5) Payee List
* 6) Trust Account List
* 7) Voided Check List
* 8) 1099 Report
* 9) Print 1099 Forms
* 10) Create APS 1099 Merge File
* 11) Tabs3 1099 E-file

6) Maintenance
* 1) Import Transactions
* 2) Change Key Type
* 3) Renumber Trust Account
* 4) Renumber Attorney
* 5) Rename Payee
* 6) Rename Contact

7) Utilities/View
* 1) TAS Customization
* 2) Data File Integrity Check
* 3) Reindex Files
* 4) View Active User List
* 5) View TAS Support Log

Menu ***Reports | Access Profile List***

The Access Profile List shows the access profiles that have been defined using the Access Profile window and the access rights that have been assigned to each access profile. You can optionally include the access rights for individual systems—either detail or summary. You can also specify which system's access rights you want included.

When including access rights for individual systems, a grid is shown for each system the profile has access rights to, indicating the functions that can be accessed by the members of the access profile. The numbers down the left side of the grid correspond to the detail groups of menu options shown on the detail Access Profile List. The numbers across the top correspond to the specific function that can be accessed. The difference between an Access Profile List with summary access rights and one with detail access rights is that a list with detail access rights includes a complete listing of the names of each function on the list. Enabled functions are indicated by an asterisk (*) next to the name.

You must be a manager to print this report.

Note: A complete listing of the detail access rights for all systems can be found in Knowledge Base article **R11652** "Access Rights" (support.Tabs3.com).

Definitions

Date	The date the list was printed.
Access ID & Name	The 8-character Access Profile ID and Description.
Software Access–T3, PM, TR, AP, GL	Indicates whether members of the access profile will have access to the specific software applications. T3 = Tabs3 Billing, PM = PracticeMaster, TR = Tabs3 Trust Accounting, AP = Tabs3 Accounts Payable, and GL = Tabs3 General Ledger.
System Configuration Access–User, Firm, Group, Active	Indicates whether members of the group will have access to the User Configuration, Firm Information, Group Information, and Active User List windows in System Configuration

Client Portal Access Log

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08/26/2024 09:09:08	pfranklin@petersoninsurance.com attempted login failed due to invalid password
08/26/2024 09:10:56	pfranklin@petersoninsurance.com logged in
08/26/2024 09:17:35	pfranklin@petersoninsurance.com session expired
08/26/2024 09:35:27	pfranklin@petersoninsurance.com logged in
08/26/2024 09:42:16	pfranklin@petersoninsurance.com logged out

Menu ***View | Log Files | Client Portal Access Log***

The Client Portal Access Log is a detailed log that file tracks the date, time, and email address for the following Client Portal events:

- Logins
- Login failures (the user attempted to log in with a registered email address and an incorrect password)
- Logouts
- Expired sessions (the session timed out due to inactivity)

Client Portal Communications Report

Date: 08/26/2024

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Last Status Update	Sent To	Status	Subject
08/25/2023 09:36:05 AM	sberg@benningtonmorris.com	Success	Client Portal Account - Client Added
08/24/2023 03:22:47 PM	pfranklin@petersoninsurance.com	Success	Client Portal Account Creation
08/24/2023 01:17:22 PM	sberg@benningtonmorris.com	Success	Client Portal Account Creation
08/24/2023 12:19:05 PM	sueberg@benningtonmorris.com	Failure	Client Portal Account Creation

The Client Portal Communications Report shows a list of Client Portal invitation emails sent. The Client Portal allows clients to access their current balance and pay their bills via Tabs3Pay. You must be a manager to print this report.

Definitions

Last Status Update The date and time the email was sent or the failure message was received.

Sent To The email address to which the invitation was sent.

Status “Success” = the email was sent successfully, “Pending” = the email is in the process of being sent (may occur when the receiving email server is busy), or “Failure” = the email could not be sent (verify the email address and try sending again later).

Subject The Subject line of the email. “Client Portal Account Creation” = an invitation sent to a contact who doesn’t currently have access to the Client Portal. Client Portal Account - Client added = an email notifying an existing Client Portal user that they have access to a new matter.

Exchange Connector Test Report

```
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Exchange Server Name: mailserver
Administrative User Name: PMExchConnector@firm.local

Log On: Successful

The Exchange Connector successfully connected to the Exchange Server, but encountered errors while trying to access
certain folders. Review the following results.
-----------------------------------------------------------------------------------------------------------------------
-----
User ID      Folder         Type           Result
-----------------------------------------------------------------------------------------------------------------------
-----
JAMES        Events         Create         Successful
JAMES        Events         Edit           Successful
JAMES        Events         Delete         Successful
JAMES        Tasks          Create         Successful
JAMES        Tasks          Edit           Successful
JAMES        Tasks          Delete         Successful
JAMES        Contacts       Create         Cannot find Outlook folder. Verify this user has logged in to
PracticeMaster.
JAMES        Contacts       Edit           Unable to test due to add failure
JAMES        Contacts       Delete         Unable to test due to add failure
-----------------------------------------------------------------------------------------------------------------------
-----
SALLY        Events         Create         Not configured for automatic synchronization
SALLY        Tasks          Create         Not configured for automatic synchronization
SALLY        Contacts       Create         Successful
SALLY        Contacts       Edit           Successful
SALLY        Contacts       Delete         Successful
-----------------------------------------------------------------------------------------------------------------------
-----

Additional Resource: Knowledge Base Article R11597
```

The Exchange Connector Test Report is generated when the **Test Server** or **Test Permissions** buttons are clicked in the Microsoft Exchange Integration window (***System Configuration* | *Settings* | *Microsoft Exchange Integration***).

During the test, the Exchange Connector will attempt to connect to the Exchange server. If the Exchange Connector is unable to connect, the Exchange Connector Test Report will print with an error indicating the problem. If the **Exchange Server Name**, **Administrative User Name**, and **Administrative Password** are all correct and the connection is successful, the Exchange Connector will attempt to create, edit, and delete a record in each folder a PracticeMaster user has configured for automatic synchronization. The results of this test will be noted on the Exchange Connector Test Report.

Definitions

User ID Indicates the user record whose Exchange folders are being tested.

Folder Indicates the folder type being tested (i.e., Events, Tasks, or Contacts).

Type Indicates the type of action being tested (i.e., Add, Edit, or Delete).

Result Indicates the result of the test. See Knowledge Base Article **R11597**, "Troubleshooting the PracticeMaster Platinum Exchange Connector," for a list of possible results and solutions.

Group List

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Group List

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Group ID	Group Name	User ID	User Name
ANDERSON	Anderson's Staff	JASON	Jason I. Masterson
		KENDRA	Kendra I. Michaels
		RON	Ronald P. Anderson
JENSEN	Jensen's Staff	DAN	Daniel H. Brady
		JPP	Jimmy P. Praum
		MLJ	Michael L. Jensen
MARTIN	Martin's Staff	CHERYL	Cheryl Bradley
		JEN	Jennifer A. Noonan
		PAM	Paula Ann Martin
PARTNERS	Firm Partners/Of Counsel	MLJ	Michael L. Jensen
		PAM	Paula Ann Martin
		ROBERT	Robert O. Burns
		RON	Ronald P. Anderson
STAFF	Staff	CHERYL	Cheryl Bradley
		DAN	Daniel H. Brady
		JASON	Jason I. Masterson
		JEN	Jennifer A. Noonan
		JPP	Jimmy P. Praum
		KENDRA	Kendra I. Michaels
TIMEKPRS	Timekeepers	JEN	Jennifer A. Noonan
		MLJ	Michael L. Jensen
		RON	Ronald P. Anderson

The Group List shows the members of each group. Groups are used by PracticeMaster for calendaring, scheduling, filtering, and eNote purposes. You must be a manager to print this report.

Definitions

Date The date the list was printed.

Group ID The 8-character Group ID.

Group Name The 30-character Group Name.

User ID & User Name The User ID and User Name of each user belonging to the group.

Tabs3 Connect Log

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08/24/2024 06:09:08	T3Connect.exe stopped
08/24/2024 06:10:56	T3Connect.exe starting
08/24/2024 06:11:00	T3Connect.exe successfully connected to www.tabs3connect.com

Menu ***View | Log Files | Tabs3 Connect Log***

The Tabs3 Connect Log is a detailed log file used for reviewing chronological Tabs3 Connect activity and troubleshooting connection issues. This log is accessed by clicking the **View Log** button in the Tabs3 Connect Administration window *(**Platinum | Tabs3 Connect Administration**)* in System Configuration or by selecting ***View | Log Files | Tabs3 Connect Log*** in System Configuration.

More information on the Tabs3 Connect Log can be found in Knowledge Base Article **R11762**, “Troubleshooting Tabs3 Connect.”

Tabs3 Connect Access Log

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Date	Time	User ID	Event	IP Address	Information
08/26/2024	11:27:08	JAMES	Log Out	89.57.32.145	
08/26/2024	10:13:17	JAMES	Download	89.57.32.143	\\Server\Tabs3\CMSystem\Docs\Fee Agreement.doc
08/26/2024	10:55:28	JAMES	Log In	89.57.32.143	

Menu ***View | Log Files | Tabs3 Connect Access Log***

The Tabs3 Connect Access Log tracks Tabs3 Connect access by individual users and allows you to filter the information shown by selecting specific users, events, and a date range. Each time a user logs in, logs out, is locked out of Tabs3 Connect (due to five failed login attempts), or downloads a document or email attachment, an entry is written to the Tabs3 Connect Access Log.

Note: If you are attempting to troubleshoot a connection problem with Tabs3 Connect, use the Tabs3 Connect Log instead because it provides detailed error messages for connection failures and other errors.

User List

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User ID	User Name Email Address	Verification ID	Logon User	Tabs3 Connect	Access 1	Access 2	Access 3 Calendar Access Rights	Access 4	Access 5	Active Directory
ALICE	Alice M. Thompson athompson@jensenmartinlaw.com	0019	Yes	No	MANAGER					
					KENDRA	Edit public	Browse Private			
					MLJ	Edit public				
					PAM	Edit public				
					RON	Edit public	Browse Private	Edit Private		
					UNASSIGN	Edit public				
CATHY	Cathleen Trudore OfficeMgr@jensenmartinlaw.com	0020	Yes - Windows Account	Yes	MANAGER					FIRM\CathyT
CHERYL	Cheryl Bradley cbradley@jensenmartinlaw.com	0008	Yes - Windows Account	Yes	APGL	BILLING	DATA	PMDATA		FIRM\CherylB
DAN	Daniel H. Brady	0021	Yes - Windows Account	No	APGL	BILLING	SUPERVIS			FIRM\DanB
JASON	Jason I. Masterson jmasterson@jensenmartinlaw.com	0022	Yes - Windows Account	Yes	PMDATA					FIRM\JasonM
JEN	Jennifer A. Noonan jen@jensenmartinlaw.com	0023	Yes	No	SUPERVIS					
JPP	Jimmy P. Praum jpp@jensenmartinlaw.com	0024	Yes - Windows Account	Yes	DATA	PMDATA				FIRM\JimmyP
KENDRA	Kendra I. Michaels	0025	Yes - Windows Account	Yes	BILLING	PMDATA	PMONLY			FIRM\KendraM
MLJ	Michael L. Jensen mjensen@jensenmartinlaw.com	0026	Yes - Windows Account	No	SUPERVIS					FIRM\MikeJ
PAM	Paula Ann Martin PMArtin@jensenmartinlaw.com	0027	Yes - Windows Account	Yes	DATA	PMDATA	PMONLY	SUPERVIS		FIRM\PaulaM
					KENDRA	Edit public	Browse Private			
					MLJ	Edit public				
					RON	Edit public	Browse Private	Edit Private		
					UNASSIGN	Edit public				
ROBERT	Robert O. Burns Rburns@jensenmartinlaw.com	0028	Yes - Inactive	Yes	PMDATA					
RON	Ronald P. Anderson	0013	Yes	Yes	MANAGER					
UNASSIGN	Unassigned Court Item	0023	No	No						

Date: 08/26/2024	**User List**		Page: 1
User ID	**User Name** **Email Address**	**Verification ID**	**Logon User**
ALICE	Alice M. Thompson athompson@jensenmartinlaw.com	0019	Yes
CATHY	Cathleen Trudore OfficeMgr@jensenmartinlaw.com	0020	Yes
CHERYL	Cheryl Bradley cbradley@jensenmartinlaw.com	0008	Yes
DAN	Daniel H. Brady	0021	Yes
JASON	Jason I. Masterson jmasterson@jensenmartinlaw.com	0022	Yes
JEN	Jennifer A. Noonan jen@jensenmartinlaw.com	0023	Yes
JPP	Jimmy P. Praum jpp@jensenmartinlaw.com	0024	Yes
KENDRA	Kendra I. Michaels	0025	Yes
MLJ	Michael L. Jensen mjensen@jensenmartinlaw.com	0026	Yes
PAM	Paula Ann Martin PMArtin@jensenmartinlaw.com	0027	Yes
ROBERT	Robert O. Burns Rburns@jensenmartinlaw.com	0028	Yes
RON	Ronald P. Anderson	0013	Yes
UNASSIGN	Unassigned Court Item	0023	No

The User List shows the User ID, User Name, and email address. The following options are available when printing the report:

- Include whether the user is a Logon User.
- Include whether the user is configured to access Tabs3 Connect.
    - Include only users who are configured to access Tabs3 Connect.
- Include access profiles and PM calendar rights.
- Include the Tabs3 Billing/PM timekeepers that have been assigned to each user.
- Include the Active Directory domain and account assigned to each user.

This list can only be printed by members of the Manager access profile.

Definitions

Date The date the list was printed.

User ID The 8-character identifier assigned to the user. The User ID must be entered by the user to start the software. It is also used in the heading on verification lists and criteria pages and is used as the default file name when saving reports to a file.

User Name The user's name. The User Name is included on verification lists and is shown in the Active User List when it is displayed.

Email Address The user's email address. The email address entered here is used by the following locations:

PracticeMaster
Email Notifications
Word Document Assembly
HotDocs Assembly

Tabs3 Connect
Login Email

Tabs3 Billing
Email Templates
LexCharge Reports

Trust
LexCharge Reports

Verification ID The Verification ID is a four-digit number that is assigned to each user. The Verification ID is used internally.

Tabs3 Connect A **Yes** in this column indicates the user is configured to access Tabs3 Connect.

Logon User A **Yes** in this column indicates the user will be using the software as opposed to being a resource (such as rooms or equipment) that is set up as a user for scheduling purposes in PracticeMaster. A **Windows Account** in this column indicates the user is configured to log in automatically when starting Tabs3 Software using a specific Windows logon. An **Inactive** in this column indicates that the user has been marked inactive.

Access 1-5 The access profiles shown are the access profiles assigned to the user. Each user can be assigned up to 5 access profiles using the User Configuration window. Users have the rights of each access profile to which they are assigned.

Calendar Access Rights The Calendar Access Rights are shown on the User List under the access profiles assigned to each user. These rights represent the rights that the user has to other users' calendar records. By default, all users who have access rights to the Calendar can browse all users' public calendar records. For example, in the report on page 11, user Alice has rights to edit Ron's public calendar records. Therefore, she can edit Ron's public calendar records as well as her own calendar records (both public and private). She also has access to Ron's private calendar records. It is important to note that the Calendar Rights shown for user Alice are not the same as the Calendar Rights that are granted to Alice's calendar records. If you were to access Alice's user record via the User Configuration window and click the **Calendar Rights** button, you would see that there are no non-manager users with rights to edit Alice's public or private calendar records. Keep in mind that any manager has the ability to edit public, browse private and edit private calendar records for all users.

Timekeepers If using Tabs3 Billing or PracticeMaster, Tabs3 Billing/PM timekeepers can optionally be assigned to the user. Assigning a timekeeper to a user indicates that the user can access transactions and productivity figures only for that timekeeper. The user will not be allowed access to transactions and productivity figures for other Tabs3 Billing timekeepers. Since members of the Manager access profile have access to all information, Tabs3 Billing timekeepers cannot be assigned to users who are members of the Manager access profile.

Active Directory Displays the Active Directory domain and User ID assigned to the user if the user is linked to a Windows account. Requires the Platinum SQL edition of Tabs3 Software.