Tabs3
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Platinum Setup Guide


Tabs3 Billing


PracticeMaster


Trust Accounting


Accounts Payable


General Ledger

Tabs3 Platinum Software Setup Guide

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Initial Platinum Configuration

The Platinum edition of the Tabs3 Software includes additional features not present in the non-Platinum edition. This guide is intended to supplement the **Post-Install Guide** by providing information regarding Platinum-exclusive features. If you have not yet installed the Tabs3 Software, please refer to the **Pre-Install Guide** before proceeding.

More Info: For a quick explanation of Platinum features and benefits, see Knowledge Base Article **R11379**, "Platinum Overview." More complete information regarding the Tabs3 Platinum Software can be found in the **Platinum Server Guide**.

Verify the Platinum Software is Working

Ensure that your firm's users can access the Tabs3 Software successfully from their workstations before proceeding. If users receive errors attempting to access the Tabs3 Software, contact Tabs3 Support for assistance.

If your firm just upgraded to Platinum, ensure that data you entered prior to the upgrade is still present. If you are missing data or no data is present, you may have installed the Tabs3 Platinum Software to an invalid location. Contact Tabs3 Support for assistance.

Verify the Report Accelerators are Working

The Tabs3 Billing and PracticeMaster Accelerators are applications that run on the Platinum Server and process complex tasks that would normally require significant network traffic, including reports and filtering.

▸ To verify the Tabs3 Billing Accelerator

1. In the Tabs3 Billing Quick Launch, search for and select "About Tabs3 Billing."
2. In the middle box, scroll down until you locate **T3Accel Current Status**.
3. Verify that the status is "Connected." If the status is "Local," contact Tabs3 Support for assistance.

▸ To verify the PracticeMaster Accelerator

1. In the PracticeMaster Billing Quick Launch, search for and select "About PracticeMaster."
2. In the middle box, scroll down until you locate **PMAccel Current Status**.
3. Verify that the status is "Connected." If the status is "Local," contact Tabs3 Support for assistance.

Tabs3 Connect

Tabs3 Connect allows users to perform common Tabs3 Billing and PracticeMaster tasks from a browser window on any device. In order for users to access Tabs3 Connect, the feature must be configured. Configuration consists of the following three steps:

- Enable Tabs3 Connect for the Firm
- Configure Access Profiles to Administer Tabs3 Connect Users
- Configure Users to Access Tabs3 Connect

Tabs3 Connect Subscription Note: If you will be accessing Tabs3 Connect using a Tabs3 Connect Billing license, PracticeMaster Basic must be installed and configured prior to enabling Tabs3 Connect. Knowledge Base Article **R11027**, "Installing the Try Before You Buy PracticeMaster License," includes step-by-step instructions for installing and configuring PracticeMaster Basic.

▸ To enable Tabs3 Connect for the Firm

1. Start System Configuration.
2. From the **Platinum** menu, select **Tabs3 Connect Administration**.
3. Select the **Enable Tabs3 Connect** check box.
4. In the **Automatically log users off after XX minutes of inactivity** field, specify a timeout value.
5. In the **Notices** section, enter the **Email Address** where you want email messages sent regarding Tabs3 Connect. A valid email address is required.
6. Press Ctrl+S to save your changes.
7. Click the **Start** button to start Tabs3 Connect. Tabs3 Connect is ready to use once the status indicators display the following values:
   - **Tabs3 Connect Status**: *Running*
   - **Connection Status**: *Connected*
8. Close the window.

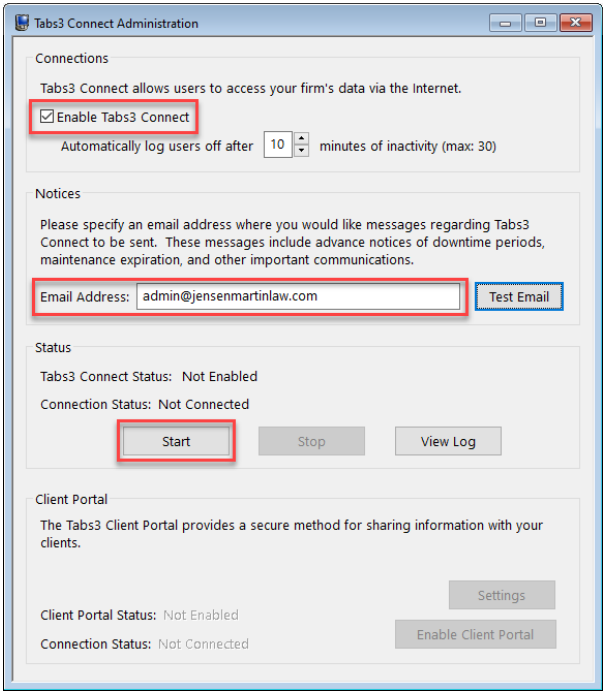

Figure 1, Tabs3 Connect Administration window

Firewall Note: In rare circumstances, your firm's external firewall may need to be configured to allow outgoing connections for port 1621. Check with your firm's IT department to determine if outgoing connections are blocked by default.

Note: If you have not yet configured users or access profiles in the Tabs3 Software, see the **Administrator Guide** for more information before proceeding.

Note: The following procedure is not used to grant users access to Tabs3 Connect, but is used to designate which users have rights to change the Tabs3 Connect settings on behalf of users (themselves or others).

▸ To configure access profile(s) for Tabs3 Connect user administration

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 Tabs3 Connect users.
4. Under **System Configuration Access**, select the **Tabs3 Connect Access and Settings** check box.
5. Press Ctrl+S to save the Access Profile.

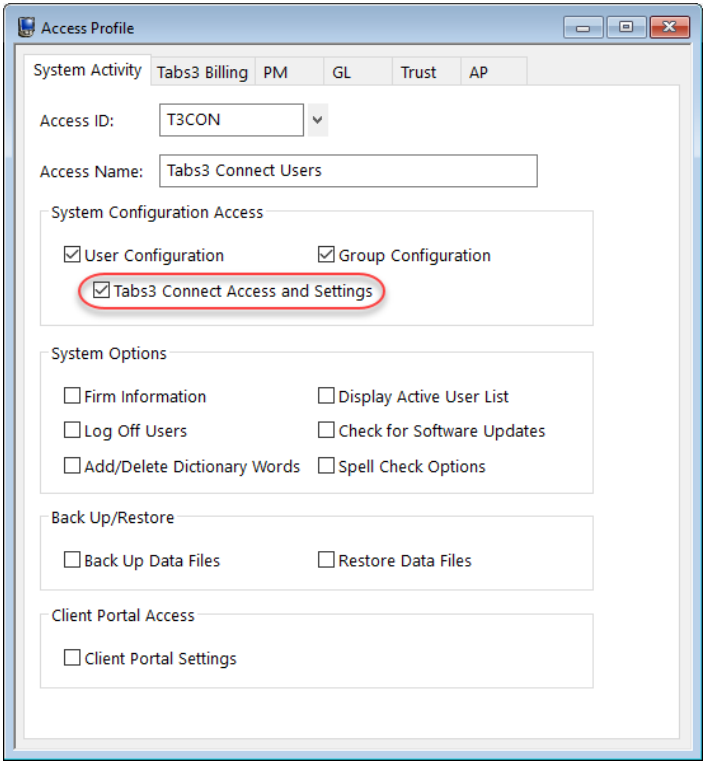

Figure 2, Access Profile window

▸ To configure users for Tabs3 Connect access

1. Start System Configuration.
2. From the **File** menu, point to **Open** and then select **Users** (Figure 3).
3. Select the **User ID** that will be accessing Tabs3 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 Tabs3 Connect**.
6. Click the **Tabs3 Connect Settings** button and enter the following information in the Tabs3 Connect Settings window (Figure 4):
    a. In the **Feature Access** section, specify whether the user will access Tabs3 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 Tabs3 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 contain at least one capital letter, one lowercase letter, and one number.
    c. Select the default **Fee Timekeeper** for fees and costs created by the user.
    d. Select the **Hide Timekeeper Field On Form** check box if the user will only be working with transactions for their assigned Fee Timekeeper.
    e. Select the preferred **Text Macro Default** setting for the user. See Knowledge Base Article **R11682**, "Using Text Macros in Tabs3 Connect," for more information.
    f. Optionally click **Configure Authentication** to require multi-factor authentication (MFA) when signing into Tabs3 Connect. Users must configure an authenticator app from this window. See Knowledge Base Article **R11480**, "All About Tabs3 Connect," for information on configuring MFA.
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 Tabs3 Connect.

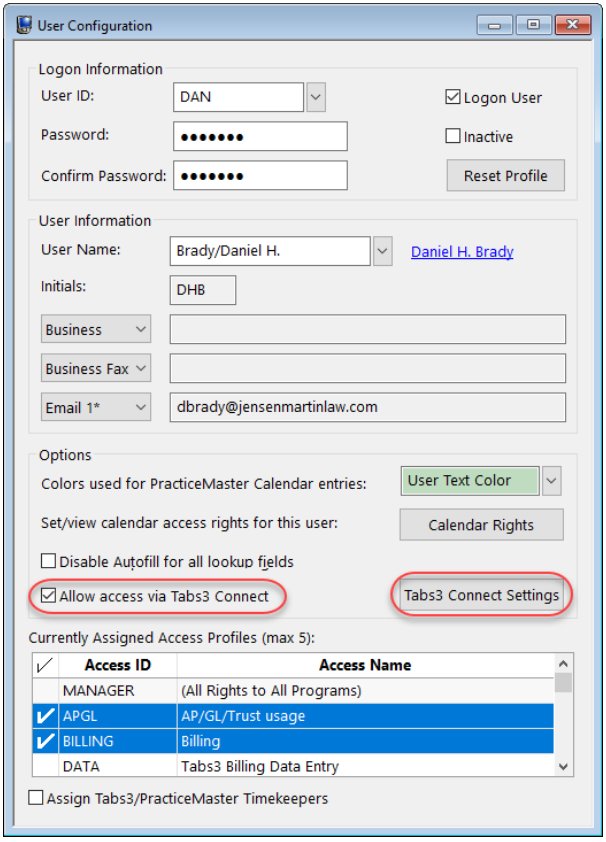

Figure 3, User Configuration window

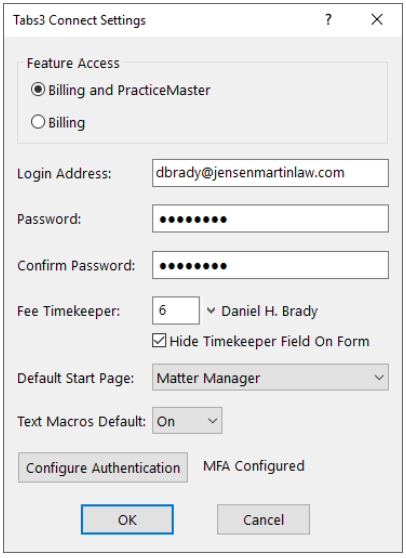

Figure 4, Tabs3 Connect Settings window

Note: The number of users that can be configured for Tabs3 Connect access is limited to the number of users for your PracticeMaster license plus the number of users for your Tabs3 Connect Billing license. More information on Tabs3 Connect licensing can be found in Knowledge Base Article **R11480**, "All About Tabs3 Connect." If you need additional user licenses, please contact your Tabs3 Software consultant, or our Sales Department at (402) 419-2200.

Note: If your firm uses PracticeMaster, you may want to grant rights for downloading files via Tabs3 Connect. This right is granted via the access profile. You may want to add a new access profile or grant this right to one or more existing access profiles.

▸ To enable file downloads for an access profile:

1. From the **File** menu, point to **Open** and select **Access Profile**.
2. Select the **Access ID** to which you will grant rights for users to download files from Tabs3 Connect.
3. Click the **PM** tab (Figure 5).
4. In the **File Information** section, select the **Download Files via Tabs3 Connect** function.
5. In the **Selected Functions** section, click **Allow**.
6. Press Ctrl+S to save the Access Profile.

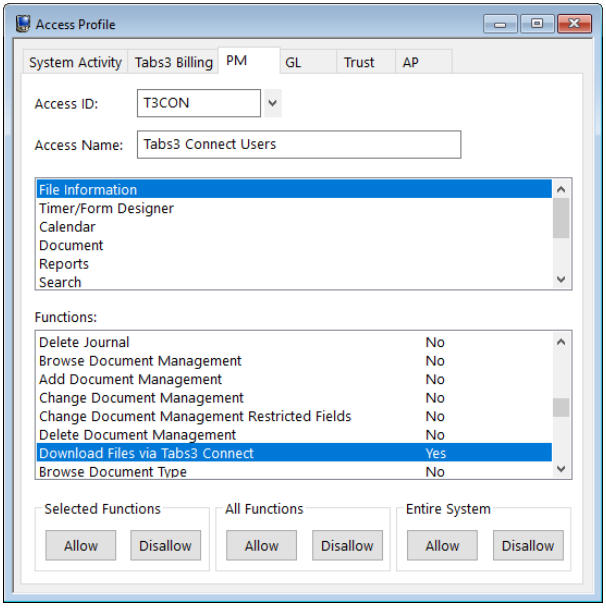

Figure 5, Download Files via Tabs3 Connect Access Right

Client Portal

The Tabs3 Platinum Software includes a Client Portal feature, which allows you to offer your clients the ability to view and pay their bills from any web browser. This feature can be configured once you have enabled Tabs3 Connect.

Note: Making payments via the Client Portal requires Tabs3Pay, our premier electronic payments solution. If you did not request a Tabs3Pay account when you purchased the Tabs3 Software license, you can sign up for Tabs3Pay directly from the Tabs3 Billing Quick Launch. See Knowledge Base Article **R11869**, "Configuring Tabs3Pay," for more information.

▸ To enable the Client Portal

1. Start System Configuration.
2. From the **Platinum** menu, select **Tabs3 Connect Administration**.
3. In the Client Portal section (Figure 1), click the **Enable Client Portal** button. A confirmation window will be displayed (Figure 6).

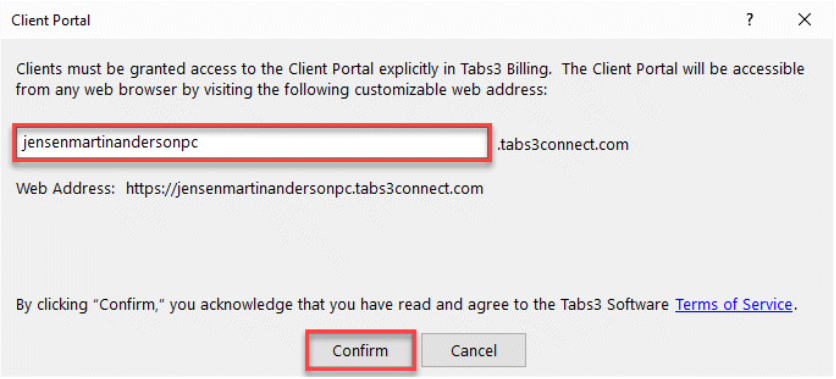

Figure 6, Client Portal Confirmation window

4. Specify the subdomain you want to use for your firm's client portal. The default value is based on the **Firm Name** specified in the Firm Information window ***(File | Open | Firm)*** in System Configuration (e.g., "Jensen, Martin & Anderson, PC" is shortened to "jensenmartinandersonpc").
5. Click the **Confirm** button to register your subdomain and enable the Client Portal. If your specified subdomain is already in use by another firm, enter a new subdomain and click **Confirm** again.
6. A message will be displayed asking if you want to view additional setup options. Click **No** to return to the Tabs3 Connect Administration window.
7. When you are finished, close the Tabs3 Connect Administration window.

Note: Up to 63 characters can be specified for your firm's subdomain. Only letters, numbers, and the hyphen ("-") and underscore ("_") characters can be used. The subdomain cannot begin with a hyphen.

For the steps to grant contacts access to the Client Portal as well as additional configuration options, see Knowledge Base Article **R11919**, "Configuring the Tabs3 Client Portal."

Server Cache

The Tabs3 Platinum Software allows you to determine how much of your server's available memory to allocate to caching data and index files. Caching improves the Tabs3 Software's performance by storing frequently used information in memory rather than accessing it from the physical drive every time it is needed. By default, the Tabs3 Platinum Software is configured with a relatively small cache to ensure compatibility with all servers. Therefore, we recommend that Platinum firms configure caching as soon as possible to maximize performance.

▸ To configure the Platinum Server Cache

1. From System Configuration, select ***Platinum | Platinum Server Configuration***.
2. Click the **Server Cache** tab.
3. Click the **Modify** button.
4. Drag the slider to your preferred cache level. *(Note: Press F1 from this window for more information on configuring the cache.)*
5. Click the **OK** button to apply the change.

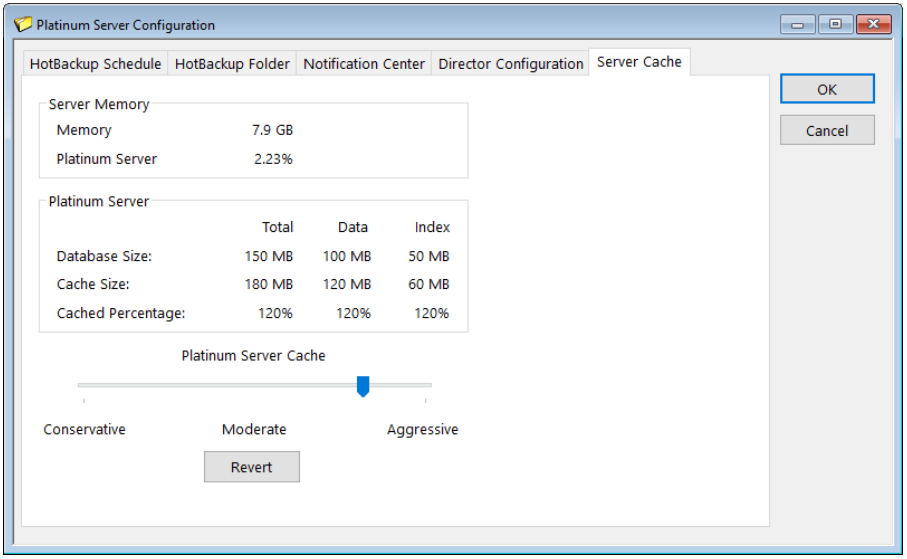

Figure 7, Server Cache tab

Note: As your database size increases over time, you may need to periodically adjust this setting to maximize performance.

HotBackup

HotBackup is a Platinum-exclusive feature that allows you to back up data files while users are working in the Tabs3 Software as well as schedule backups throughout the day. HotBackup requires some basic configuration to ensure that scheduled backups are being performed and that someone is notified in the event a HotBackup fails to complete successfully.

Important: The HotBackup feature is intended to supplement rather than replace a full external backup of the server. External backups should be run at least once per day, and tested on a regular basis to ensure that the Tabs3 Software can be successfully restored. A thorough discussion of the backup options can be found in Knowledge Base Article **R11213**, "Backup Strategy."

Important: Firms with large amounts of data should consider alternative backup methods, such as VSS, which also allows backups to occur while the Tabs3 Software is in use. Complete details can be found in Knowledge Base Article **R11430**, "Using Volume Shadow Copy Service (VSS) to Back Up Tabs3 Software."

Specify a HotBackup Folder

By default, C:\HotBackup is the location of your HotBackup folder. Depending on your server configuration, another location on the C drive or a secondary drive may be more appropriate. Many firms prefer to store HotBackups on a larger secondary drive rather than the Windows drive for both storage and performance reasons.

Important: HotBackup makes a complete copy of your firms Tabs3 Software data files. When choosing a location for your HotBackup folder, ensure that there is sufficient space to store the number of backups you want to retain. Running out of drive space due to HotBackup storage will result in a significant drop in the server's performance.

▸ To specify a different location

1. From System Configuration, select ***Platinum | Platinum Server Configuration***.
2. Click the **HotBackup Folder** tab.
3. In the **Specify the HotBackup Folder based on the Director's (STDIRECT.EXE) point of view** field, enter the path you want to use to store HotBackups. *(Note: This path must be to a drive that is physically connected to the server.)*
4. Click the  button or press Ctrl+S to save your changes.

Determine the Number of HotBackups to Retain

By default, the Tabs3 Software stores four recent HotBackups and two archive HotBackups. Each successful HotBackup is stored in the Recent folder. Once the maximum number of recent HotBackups is reached, the oldest HotBackup is moved to the Archive folder. Once the maximum number of archive HotBackups is reached, the oldest HotBackup is deleted from the Archive folder.

▸ **To change the number of HotBackups stored**

1. From System Configuration, select ***Platinum | Platinum Server Configuration***.
2. Click the **HotBackup Folder** tab.
3. Set the values on the **Recent** and **Archive** fields to the number of HotBackups you want to retain in each category.
4. Click the  button or press Ctrl+S to save your changes.

Schedule HotBackups

In addition to letting you run backups while other users are in the Tabs3 Software, you can schedule HotBackups throughout the day. For example, you might want to back up your data every weekday at noon and 5:00 p.m.

▸ **To configure a HotBackup schedule**

1. From System Configuration, select ***Platinum | Platinum Server Configuration***.
2. Click the **HotBackup Schedule** tab.
3. Click the **Schedule Recurring HotBackups** button.
    a. In the **Days to Schedule** section, select the days you want to run the HotBackup. If you selected **Specific Day(s)**, select the individual day or days the HotBackup will run.
    b. In the **Start** field, select the time the HotBackup will start.
    c. Click the **OK** button.
4. Repeat step 3 for each scheduled HotBackup you want to add.
5. When you are finished, click the  button or press Ctrl+S to save your changes.

Configure Notifications

The Tabs3 Software can notify a designated person or group when scheduled events are complete. The following types of notifications can be created:

- **HotBackup** notifications can be sent when a HotBackup succeeds or fails. This helps ensure that your data is being backed up on a regular basis, and any issues with the HotBackup process are quickly resolved.

- **Rebuild Search Index** notifications can be sent when a scheduled rebuild or refresh of PracticeMaster search indexes succeeds or fails. This helps ensure that your Conflict of Interest and Document Search terms are up to date.

  Note: Additional information about scheduling a rebuild or refresh of search indexes can be found in the ***PracticeMaster Search Guide***.

- **Exchange Connector** notifications can be sent when errors are encountered by the Exchange Connector. This allows any issues to be resolved quickly.

  Note: Additional information about integrating with Outlook using the Exchange Connector can be found in the ***Outlook Integration Guide***.

▸ To configure a Notification email

1. From System Configuration, select ***Platinum | Platinum Server Configuration***.
2. Click the **Notification Center** tab.
3. Click the **Add New Message** button.
   a. Select the type of notification to create and then click **Next**.
   b. Specify a **Description**, and select any additional settings for the notification.
   c. Click the **Finish** button.
4. Repeat step 3 for each notification you want to add.
5. When you are finished, click the  button or press Ctrl+S to save your changes.

In order to enable notifications, System Configuration must be configured to send email using an SMTP server. To enable this feature, open System Configuration and select ***Settings | Outgoing Email Configuration***. Press F1 from this window for information on configuring your outgoing email. You may need to contact your email provider or network administrator to obtain the required information.

Configure Platinum Data Security (Optional)

Firms running the Tabs3 Platinum 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 Tabs3 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."

Enable Encryption (Optional, Platinum SQL only)

The Platinum SQL Software includes a data encryption option. Once data files are encrypted, they can only be read by the Tabs3 Platinum SQL Software.

The process of encrypting the data can be time-consuming due to the amount of data that must be processed. Therefore we recommend performing this process from the server where the Tabs3 Platinum Software is installed, rather than a workstation.

Note: You must have manager rights in order to access the Data Encryption Utility. Additionally, the encryption process is a Super Exclusive function, meaning no other users can access any portion of the Tabs3 Software while the process is running.

▸ To encrypt the data files

1. Have all users exit all Tabs3 Software applications.
2. From the Platinum server computer, launch System Configuration and select ***Platinum | Data Encryption***.
    a. Select **Encrypt** and click **Next**.
    b. Select the **Yes, encrypt the data** check box.
    c. Click **Next** to begin the encryption process.
3. Upon completion, click **OK**.

Note: Additional information regarding encryption can be found in Knowledge Base Article **R11660**, "Platinum SQL Data Encryption."