

Platinum Setup Guide



Tabs3 Billing



PracticeMaster



Trust Accounting



Accounts Payable




General Ledger

Tabs3 Platinum Software Setup Guide

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Version 2022 (Wednesday, January 5, 2022)

Initial Platinum Configuration

The Platinum edition of the Tab3 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 Tab3 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 Tab3 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 Tab3 Software successfully from their workstations before proceeding. If users receive errors attempting to access the Tab3 Software, contact Tab3 Technical 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 Tab3 Platinum Software to an invalid location. Contact Tab3 Technical Support for assistance.

Verify the Report Accelerators are Working

The Tab3 Billing and PracticeMaster Accelerators are programs that run on the Platinum Server and process complex tasks that would normally require significant network traffic, including reports and filtering.

► To verify the Tab3 Billing Accelerator

1. Open Tab3 Billing and select **Help | About Tab3**.
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 Tab3 Technical Support for assistance.

► To verify the PracticeMaster Accelerator

1. Open PracticeMaster and select **Help | 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 Technical 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 **Allow connections via 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.

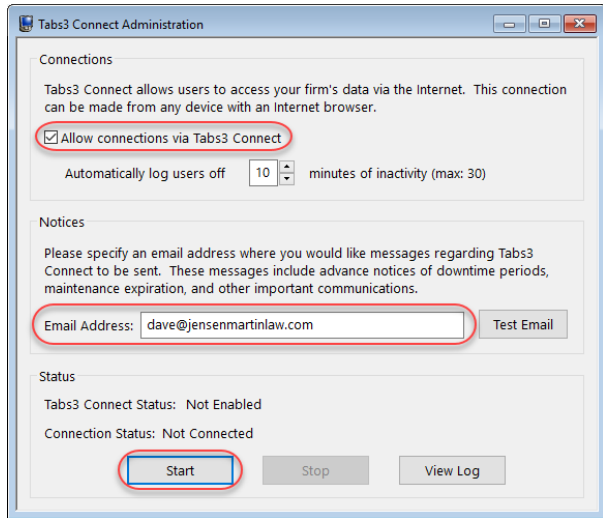


Figure 1, Tabs3 Connect Administration window

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 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 access profile(s) for Tab3 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 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.

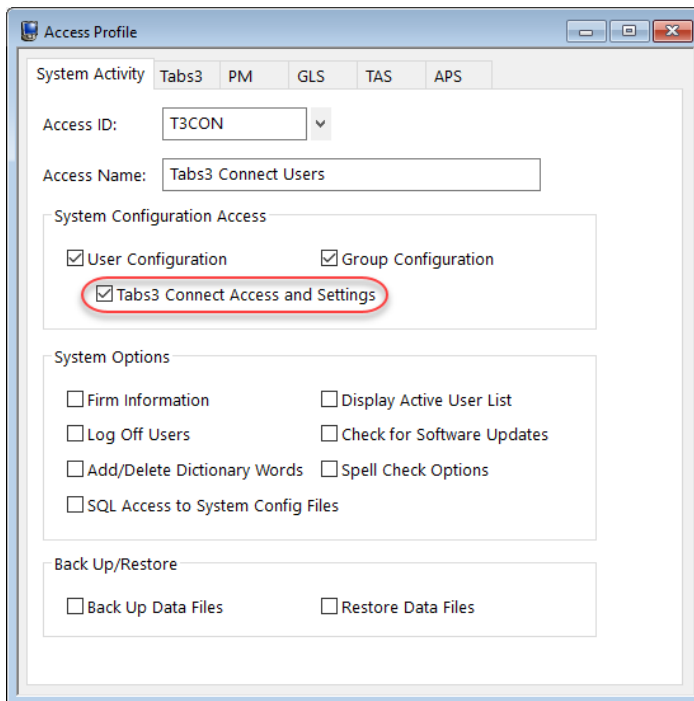


Figure 2, Access Profile window

► **To configure users for Tab3 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 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 4):
 - 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 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 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.

User Configuration

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

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: Calendar Rights
 Disable Autofill for all lookup fields
 Allow CompuLaw Dates to be generated for this user in PracticeMaster
 Allow access via Tabs3 Connect
 Tabs3 Connect Settings

Currently Assigned Access Profiles (max 5):

Access ID	Access Name
<input 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 Tabs3/PracticeMaster Timekeepers

Figure 3, User Configuration window

Tabs3 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

OK Cancel

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 local 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 Tab3 Connect.
3. Click the **PM** tab (Figure 5).
4. In the **File Information** section, select the **Download Files via Tab3 Connect** function.
5. In the **Selected Functions** section, click **Allow**.
6. Press Ctrl+S to save the Access Profile.

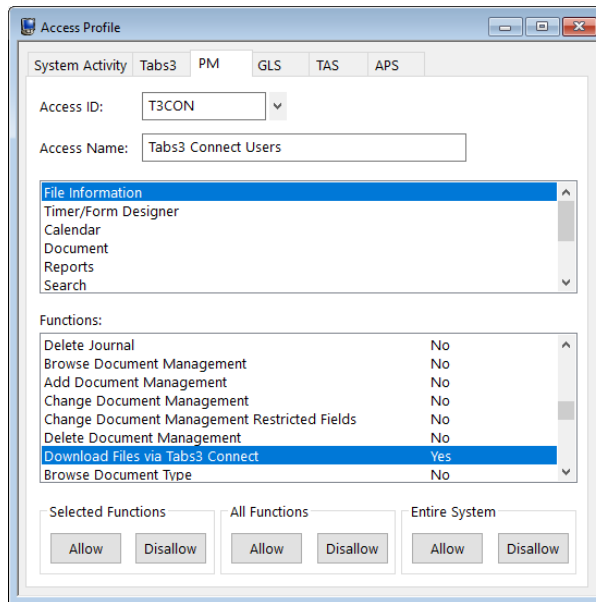


Figure 5, Download Files via Tab3 Connect Access Right

Server Cache

The Tab3 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 Tab3 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 Tab3 Platinum Software is

configured with a relatively small cache to ensure compatibility with all servers. Therefore, Tab3 recommends 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.

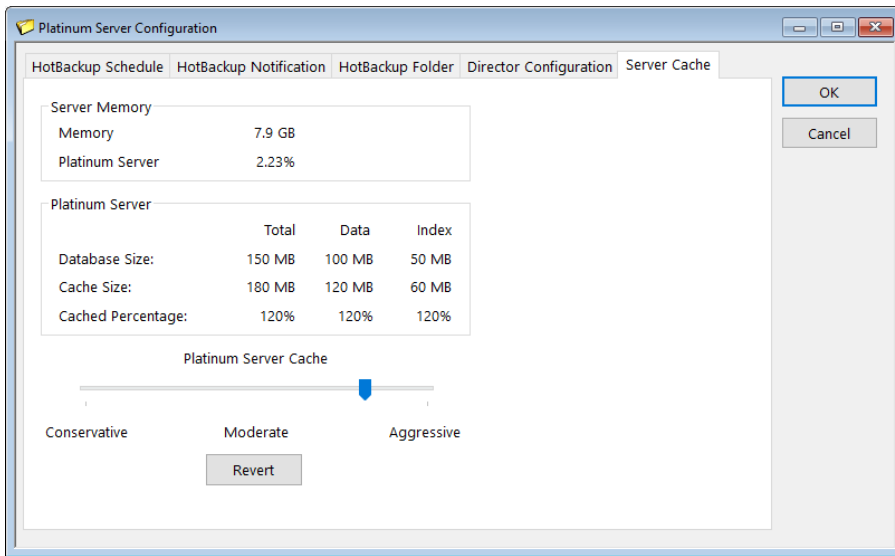


Figure 6, Server Cache tab

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 Tab3 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 HotBackup Notifications

The Tab3 Software can notify a designated person or group 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.

In order to enable HotBackup 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 Tab3 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 Tab3 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 Tab3 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 Tab3 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 Tab3 Software while the process is running.

► **To encrypt the data files**

1. Have all users exit all Tab3 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."
