

# Post-Install Guide



Tabs3 Billing



PracticeMaster



General Ledger



Accounts Payable




Trust Accounting

## **Tabs3 Software Post-Install Guide**

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## Introduction

This Post-Install Guide covers the initial configuration of the Tab3 Software once it has been installed. If you have not yet installed the Tab3 Software, please visit the [Pre-Install Guide](#) before proceeding.

## Access Rights

All users must have **full rights** to the Current Working Directory (i.e., the location where the Tab3 Software is installed on the server).


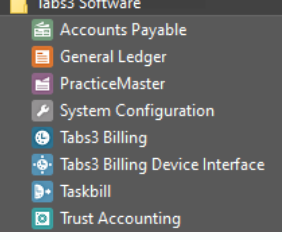

**Note:** Firms using Platinum software can limit access to the Database folder within the Current Working Directory to read-only. See the [Platinum Setup Guide](#) for more information.

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

## Configure Antivirus Software Exceptions

Virus scanning software can often adversely affect performance, cause runtime errors, and delete required files. For optimum performance, we recommend that virus scanning software be configured in such a way as to minimize interference with the Tab3 Software. Knowledge Base article [R10760](#), "Antivirus Software Information," includes additional information and recommendations.

## Starting the Software

<p><b>Desktop Shortcut</b></p>	<p>During installation, if you elected to create icons on the desktop, you can double-click the associated desktop icon.</p>	
<p><b>Start Menu</b></p>	<p>The software can be started via the Start menu. On the Windows taskbar, click the <b>Start</b> button, locate and click the <b>Tabs3 Software</b> folder, and then click the menu option for the desired software product.</p> <p>Alternatively, click the Start button, then type the name of the product you want to launch (e.g., PracticeMaster), and click the correct result.</p>	
<p><b>Application Toolbar</b></p>	<p>Within the Tabs3 Software, the application toolbar provides the ability to quickly start other Tabs3 applications. The application toolbar is located at the bottom of the Quick Launch Pane.</p>	

## 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. **SETUP.EXE** installs a local copy of the Tabs3 Software applications locally on the workstation.

### ► To install the software on a workstation

1. From the workstation, browse to the Current Working Directory on the server and run **SETUP.EXE**. (*Note: You must have Administrator privileges to 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."

## **Remote Desktop Services/Citrix Considerations**

When running under Remote Desktop Services (formerly Terminal Services) or in a Citrix environment, **SETUP.EXE** will only need to be run once by a Remote Desktop Services computer, no matter how many users log onto the workstation remotely. The following will need to be performed at the Remote Desktop Server:

1. Before running **SETUP.EXE**, delete any shortcuts to the Tab3 Software applications for each user on the workstation.
2. Run **SETUP.EXE**. Once **SETUP.EXE** is complete, a single set of desktop shortcuts will have been created. These desktop shortcuts must be copied to all other users' Desktop directory, which for Remote Desktop Services is C:\users\\Desktop. (*Note: Locations may be different for Citrix*).
3. 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).

Later, when the Tab3 Software applications are updated on the server, an Administrator must open any Tab3 Software application on the Remote Desktop Server to update the applications on the Remote Desktop Services computer. It is not necessary to run **SETUP.EXE** again, because the local applications will automatically update when the software is started.

**Note:** Additional information about using Tab3 Software on Remote Desktop Services or Citrix can be found in Knowledge Base Article [R11284](#), "Using Tab3 and PracticeMaster Software on Remote Desktop Services or Citrix."

## **Guided Setup**

When launching the software for the first time, a Guided Setup utility will walk you through configuring the Tab3 Software for the first time. Once you have completed this process, you can begin using the software. More information regarding software configuration can be found in the [Administrator Guide](#).

## Logon

When launching the software after Guided Setup is complete, the Logon dialog box will be displayed.

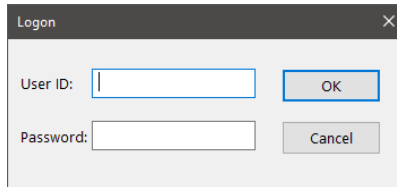


Figure 1, Logon window

Enter the User ID and password you created during the Guided Setup process.

**Note:** Additional information on configuring users can be found in the [Administrator Guide](#).

## 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




## What's Next

Once you have performed the initial configuration, use the [Administrator Guide](#) to continue configuring additional features in the software.

If you have installed the Tab3 Platinum software, see the [Platinum Setup Guide](#) for additional configuration steps to take advantage of Platinum-specific features such as Tab3 Connect and HotBackup.

## Resources

The best immediate resource for the software is our contextual help, which opens a topic in your default web browser explaining the contents of the current window. Help can be accessed by pressing the F1 key or by clicking the  button on the menu bar. Additional resources can be accessed using the **Help** menu while in the software.

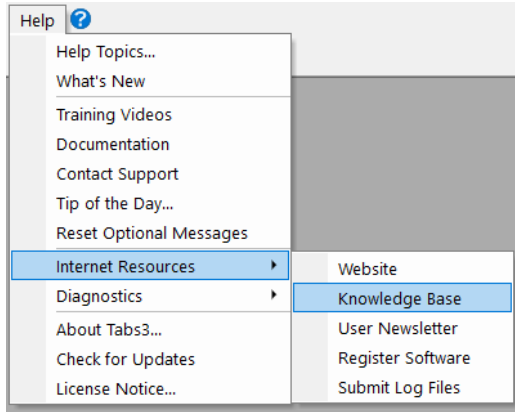


Figure 2, Help menu

The following table includes other available resources:

Resource	Location
<b>Guides</b>	<b>Help   Documentation</b> ...Or... <a href="http://Tabs3.com/docs">Tabs3.com/docs</a> ...Or... <a href="http://Tabs3.com/support/docs.html">Tabs3.com/support/docs.html</a>
<b>Knowledge Base</b>	<b>Help   Internet Resources   Knowledge Base</b> ...Or... <a href="http://support.Tabs3.com">support.Tabs3.com</a>
<b>Training Videos</b>	<b>Help   Training Videos</b> ...Or... <a href="http://Tabs3.com/video">Tabs3.com/video</a>
<b>Help Resources</b>	<a href="#">R11194</a> - Help Resources: How to Find It
<b>Technical Support</b>	(402) 419-2210
<b>Sales</b>	(402) 419-2200

## Other Installation Scenarios

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

### ***Updating the Software***

Periodically, you will be notified via the software when updates are available. Alternatively, you 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 updated applications are copied from the server to the workstation.

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

**Platinum Note:** Most updates can be run from a workstation. The Check for Updates window and installer will notify you if the update must be run from the server.

### ***Reinstalling the Software***

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

### ***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 Platinum Software

### ***Uninstalling the Software***

Step-by-step procedures for uninstalling the software can be found in Knowledge Base Article [R11776](#), "Uninstalling Tab3 Software."

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