


Platinum Server Guide



Tabs3 Software Platinum Server Guide

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Introduction to Platinum

Platinum Overview

This section of the manual provides a brief introduction to Platinum Server and Platinum software.

Platinum Server and Platinum Software

There are two components when using Tabs3 and PracticeMaster Platinum software:

Platinum Server

Platinum Server is the database server software that is used in conjunction with the Tabs3 and PracticeMaster Platinum software.

Platinum Version Software

The Platinum version of the Tabs3 and PracticeMaster software is a special version of the standard software that is used in conjunction with the Platinum Server. This version of the software relies on the Platinum Server to accommodate the sophisticated interaction between the Platinum Server and the Platinum version of the software.

How Does Platinum Software Work?

Tabs3 and PracticeMaster Platinum uses FairCom's client/server technology (page 6). The following diagram compares the differences between the standard multi-user method and the Platinum Method:

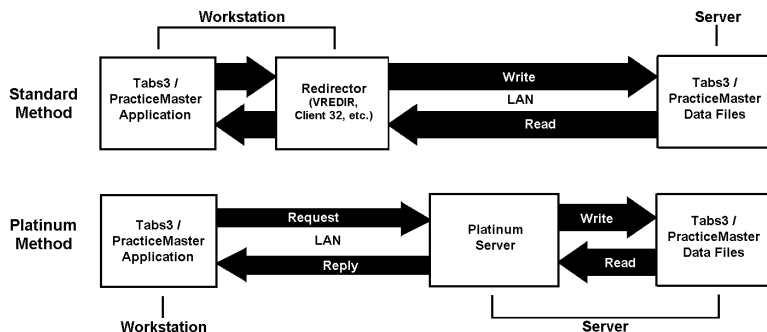


Figure 1, "Standard Method" of Networking vs. "Platinum Method" of Networking

Standard Method

When using the “Standard Method” of accessing data, an application deals with files directly. The application uses the operating system’s redirector to perform file handling requests. A redirector is the operating system’s software used for communicating over a network. This method works well up to a point; however, as more users access the same data and network traffic increases, overall performance decreases.

Platinum Method

When using the “Platinum Method” of accessing data, applications deal with the database server, which takes care of the file handling requests directly. The database server contains the “intelligence” needed to process requests from clients, interact with the relevant data files, and respond to those requests. Requests for opening files, locking files, deleting files, etc. are handled by the database server. The advantage of this design is that the database server is far more efficient and intelligent, allowing multiple network requests and responses to be grouped and coordinated, thereby minimizing network traffic and maximizing overall performance.

In Figure 1, notice the thickness of the **Request** and **Reply** arrows. The “Platinum Method” reduces the amount of information flowing back and forth over a network thereby greatly improving performance.

Why Do I Need Platinum Software?

The following are reasons why a firm would want to implement our Platinum software instead of our standard multi-user software.

Speed

One of the predominant reasons for upgrading to the Platinum version of Tabs3 and PracticeMaster software is SPEED. Local Area Network resources are used more efficiently thereby providing faster performance. In addition, Platinum features Accelerator technology to dramatically increase the speed at which Tabs3 and PracticeMaster reports are generated as well as improve sorting and filtering times.

Performance on your network will vary depending on hardware, networking software, and activity.

Reliability	Platinum utilizes Transaction Processing, an advanced database technology for maintaining the consistency and integrity of your data. Platinum also includes an Auto-Recovery feature to safeguard your data in the event the Platinum software is not shut down correctly (i.e., due to power loss, hardware failure, etc.). Furthermore, by replacing the standard network redirectors with the Platinum Server, file handling operations are more reliable.
Convenience	Tabs3 and PracticeMaster Platinum software features HotBackup technology, allowing full backups of your data to be made while users are accessing the software. An integrated scheduling system means HotBackups are automatically performed without any administration necessary.
Scalability	Platinum's architecture scales well, particularly when compared to similar increases on a standard network. If you add 10 users to a standard network, performance degradation is substantially greater than when adding 10 users to a network using client/server technology.
Efficiency	Platinum takes advantage of additional memory and multiple CPUs on the server if available. By working directly with the Platinum Server, file handling operations are performed more efficiently thus providing better use of your resources and ultimately yielding faster performance.
Features	Platinum includes numerous features that are not available in the standard multi-user software including Tabs3 Connect, HotBackup, eNote, Log Off Users, Exchange Connector, and more. Additional information regarding these features follows.

Tabs3 Connect

Tabs3 Connect provides access to Tabs3 and PracticeMaster anywhere you can connect to the Internet. No apps to download, simply go to www.Tabs3Connect.com and log in using your iPhone®, Android device, iPad®, laptop, or even an Apple® computer. Tabs3 Connect gives you access to your client and contact information, fee and cost entry, personal and firm-wide calendar, and more. On smartphones and tablets, you can tap to create a fee, and flick to scroll through a list. Tabs3 Connect was designed to protect attorneys' sensitive information.

The information you access using Tabs3 Connect is secure because it resides at your office, on your computer. It won't be stored on someone else's server in the cloud, or on a phone that you might lose.

- Enter fees and costs when they happen.
- Case information at your fingertips. Tabs3 Connect gives you a mobile Matter Manager.
- Full calendar access including the ability to create records and link them to clients and other users.
- Full access to Tabs3 and PracticeMaster contact records, with the ability to call or e-mail the contact via the record.
- eNote lets you communicate instantly with others in your office.
- Keep your data secure on your firm's server instead of having it in the cloud.
- Configure access in mere minutes by simply enabling Tabs3 Connect and specifying who will have access.

Complete information on Tabs3 Connect can be found in our Knowledge Base in Article [R11480](#) - "All About Tabs3 Connect."

HotBackup

HotBackup is a feature unique to the Platinum version of the software that backs up the data files for Tabs3 and PracticeMaster software. This feature allows backups to be performed without anyone exiting the software, thus allowing daily work to continue. A scheduling system lets you designate the times and days of the week for recurring HotBackups. These HotBackups are performed automatically, require no user intervention, and can be performed whether the Tabs3/PracticeMaster software is running or not. HotBackup also includes E-Mail Notification, which provides the ability to automatically send a pre-defined e-mail message to designated recipients when a HotBackup fails or completes successfully.

Complete information on HotBackup can be found in the HotBackup section starting on page 38.

Transaction Processing & Auto-Recovery

Transaction Processing is used to ensure that all operations of a given database transaction completely succeed, thereby guaranteeing that the database remains in a consistent, reliable state. A database transaction is a collection of operations grouped together into a single unit. For example, updating a statement encompasses many operations (i.e., updating the client ledger, updating receipt allocation, updating productivity, moving each item from the work-in-process file to the archive files, etc.), but these operations are all grouped together and considered a single database transaction.

Platinum also includes an Auto-Recovery feature that will automatically be performed if the Platinum software is not shut down correctly. In the event that a database transaction was interrupted, the Auto-Recovery feature "rolls back" the database to its previous state before the

database transaction began. This ensures the safety of your data, and minimizes any chance of data corruption.

More detailed information on Transaction Processing and Auto-Recovery can be found in our Knowledge Base in Article [R11175](#) - "Transaction Processing" at www.support.Tabs3.com.

Tabs3 and PracticeMaster Report Accelerators

A major enhancement included with the Platinum software is the addition of a Tabs3 Accelerator and a PracticeMaster Accelerator. These two programs run on the server computer, working with the Tabs3 and PracticeMaster software to **dramatically** improve performance when generating reports and statements.

Accelerators improve performance by accomplishing two main goals:

- Minimizing the amount of data transferred across the network.
- Minimizing the amount of data processed on the workstation.

In addition, Accelerators incorporate multi-threaded processing techniques, giving them the ability to process multiple users' reports simultaneously. More detailed information on Tabs3 and PracticeMaster Accelerators can be found in our Knowledge Base in Article [R11182](#) - "Tabs3 and PracticeMaster Accelerators" at www.support.Tabs3.com.

Accelerated Filtering and Column Sorting

PracticeMaster filters are processed at the server computer. Rather than having to read and filter all of the records from a file, the workstation receives only the records that have been pre-filtered by the server. This reduces network traffic and allows filtered lists to display significantly faster. Additionally, column sorting is processed at the server, which improves the speed at which lists are displayed.

PracticeMaster eNote

The eNote intra-office communication feature is available in PracticeMaster Platinum. eNotes blend the best features of e-mail and instant messaging to provide a remarkably easy to use tool that streamlines communication, facilitates workflow between users, retains records for accountability purposes, and enhance your current case management procedures. Detailed information regarding the eNote feature can be found in the PracticeMaster manual and the Help provided with PracticeMaster.

PracticeMaster Exchange Connector

The PracticeMaster Exchange Connector provides a direct link between the Platinum Server and a Microsoft Exchange server. This allows calendar and contact information to be synchronized directly between the servers, rather than via each user's copy of Microsoft Outlook. Additional information

regarding the Exchange Connector feature can be found in the Outlook Integration Guide, which is installed with the software and can also be accessed via our Knowledge Base in Article [R11400](#) - Outlook Integration Guide. Detailed instructions for configuring the Exchange Connector are available via Knowledge Base Article [R11427](#) - Configuring the PracticeMaster Platinum Exchange Connector.

Lockout Notification / Log Off Users

The Conflicting Activities window includes a **Notify** button that informs logged in users that a lockout has been initiated. Clicking the **Notify** button immediately sends a message to all logged in users requesting that they exit the software (or return to the Task Folders) so that the exclusive task can be started.

The Conflicting Activities window also includes a **Log Off Users** button. This function allows you safely log off all users after a specified time interval. When you initiate the **Log Off Users** process, all users will be notified that they will be logged out of the software when the displayed countdown ends, along with the reason they are being logged off.

The **Notify** and **Log Off Users** features are only available in the Platinum version of the software.

Accounts Receivable by Timekeeper Report

The Accounts Receivable by Timekeeper Report prints a list of clients with fees due for each working timekeeper, making it easy for individual timekeepers to see which clients owe money for work they performed. This report is different from other receivable reports, because it allows you to filter clients by including only those clients that the timekeeper worked on, a particularly nice feature for larger firms. You can optionally show fees by aging period or as a total amount. You can exclude zero balance clients, select clients whose aged balance due or total balance due is greater than a specified amount, as well as only include clients who have not made a payment in a specified number of days. The Tabs3 Report Accelerator allows these complex calculations to be performed in a fraction of the time it would take a non-Platinum Tabs3 system.

Enhanced Detail Accounts Receivable Report

The Detail Accounts Receivable Report now offers the option to include a breakdown of fees by timekeeper and costs by cost type. When this option is enabled, each timekeeper with outstanding fees is displayed on a separate row with an aging breakdown, and outstanding costs are grouped by cost type with an aging breakdown. The Tabs3 Report Accelerator allows these complex calculations to be performed in a fraction of the time it would take a non-Platinum Tabs3 system.

FairCom Server

Platinum Server Software is based on the client/server technology developed by FairCom Corporation (www.faircom.com). The FairCom client/server technology uses an engine that has been

refined over twenty-five years thus offering the reliability and stability required of critical back office systems. This technology utilizes efficient programming algorithms to provide exceptional performance. These servers support up to 1,024 connections to the database and offer maximum data throughput regardless of the number of users connected. Multi-threading capabilities take advantage of multiple CPUs on the server. All disk I/O is performed by Platinum Server, taking full advantage of sophisticated data and index caches, thereby minimizing network traffic for maximum performance.

One important reason we selected the FairCom Server was for its ease of use. Many firms have limited Information Technology (IT) resources and are not eager to allocate resources required for configuring and monitoring a database server. The FairCom solution requires minimal administration and maintenance. It requires a limited amount of system resources, thereby minimizing the need for costly hardware upgrades. Although a faster CPU or multiple CPUs will provide faster processing times, the hardware requirements for the server are relatively modest.

Another reason that we selected the FairCom Server is because Tabs3 and PracticeMaster software also utilizes FairCom's c-tree file handling system. Working with the same company that designs the file handling system provides a huge advantage because unlike many other client/server technology providers, no major data conversion is required.

Selecting FairCom also permitted us to offer a 64-bit Platinum SQL solution. Furthermore, the Platinum version of Tabs3 and PracticeMaster software can be accessed by Windows-based ODBC-compliant applications (Read Only) using the FairCom ODBC Driver (*page 62*).

The FairCom technology allows us to offer solid "out-of-the-box" performance for both large and small firms. The database is automatically self-tuning, compensating for the variations in numbers of users and connections. The scalability, minimal administration, reliability, faster throughput, and reasonable pricing of the FairCom Server made it the ideal choice for our Platinum software.

In summary, the following reasons are why we selected FairCom as the backbone of our client/server products:

Reasonable Pricing

Platinum Server and Platinum applications are affordable and cost much less than the competition. The cost of Platinum is much less expensive than competitive client/server products from other companies such as Microsoft and Oracle.

Stability

Platinum versions of Tabs3 and PracticeMaster software have been in use since before 2002. FairCom customers include many Fortune 500 companies and government agencies such as Visa, Boeing, Price Waterhouse, Xerox, and many more.

Ease of Use	Once installed and operational, Platinum is transparent to the user. No major data conversion is required, and there are no users or workstations to configure.
Minimal Administration	Installation is quick and simple. Anyone with a basic understanding of computers can do it. Once up and running, Platinum requires no regular maintenance.
64-bit SQL Version	In addition to the standard Platinum version, a 64-bit Platinum SQL version is available. Platinum SQL runs on 64-bit Windows servers and allows you to connect third-party software directly to the Platinum SQL server.
Minimal Hardware Requirements	Platinum Server must be installed on a computer running Windows 2008/2003 Server or Windows 7. Specific requirements are listed on page 10.
Capitalizes On Advanced Hardware Resources	Platinum will take advantage of multiple processors on your server. It can also be configured to take advantage of additional memory. Platinum SQL allows you to take full advantage of modern 64-bit hardware.
Easily Grows With Your Firm and Hardware	There is no workstation setup required. Adding new users causes little to no performance impact. Adding or changing workstations requires no additional administrative tasks. Upgrading your server is easy to do.

Platinum SQL Version

The Platinum SQL version provides additional functionality beyond the standard Platinum Server software.

64-bit Support	Platinum SQL is designed to work with the latest 64-bit Windows server operating systems. This allows you to take full advantage of the additional memory and processing power available with modern server hardware.
Accelerated SQL Processing	Unlike our legacy ODBC driver, which processes data at the workstation, the ODBC SQL driver included with Platinum SQL processes all data requests at the server. This results in improved performance when sending data to third-party software.

32-bit & 64-bit access

The ODBC SQL drivers are available in both 32-bit and 64-bit versions, allowing you to access data directly using 32-bit or 64-bit ODBC capable third party software such as Microsoft Excel or Access 2010.

OLE DB

In addition to ODBC, the Platinum SQL database can be accessed by OLE DB compatible software, via the Microsoft OLE DB Provider for ODBC.

For more information on using the additional features of Platinum SQL Server, see the Operating Platinum SQL Server section starting on page 29.

What Platinum Software Will Not Do

The Platinum version of Tabs3 and PracticeMaster software will not improve overall WAN (Wide Area Network) performance and should not be considered a viable solution for sluggish WAN performance. The Platinum version of the software is designed primarily for a Local Area Network.

It is important to note that increases in speed will be most noticeable with complex tasks such as report processing, updating statements, filtering records in PracticeMaster, etc. Although there will be performance improvements in most tasks, be aware that the Platinum version of the software will not noticeably increase the speed of basic data entry.

Furthermore, tasks performed on the server will always be faster than those performed across a network. This is true with or without Platinum software.

General Information about Platinum Server

Platinum versions of all Tabs3 and PracticeMaster software are available. This includes the multi-user versions of Tabs3 Billing, PracticeMaster, Tabs3 Trust Accounting Software (TAS), Tabs3 Accounts Payable Software (APS), and Tabs3 General Ledger Software (GLS). In addition, Tabs3 Custom Report Writer and Tabs3 General Ledger Custom Report Writer are also available in Platinum versions. The Platinum version of Tabs3 is available for the following timekeeper levels: 5, 9, 19, 39, 99, and 100+.

Platinum Server software is required to run any Platinum version of the software. Along with the Platinum Server software license, one year of maintenance for the Platinum Server software is also required. Licensing and pricing is based on a per connection basis. Platinum Server is available in 8, 16, 32, 64, 128, 256, 512, and 1024 connection versions. The term "connection" refers to the communication or link to the Platinum Server that is established for each application a user is running.

Overhead Connections

The Platinum Server requires five connections for overhead purposes as discussed in the following. These connections are reserved by the Platinum Server and cannot be used by other users.

Tabs3 Accelerator

The Tabs3 Accelerator uses one connection (T3Accel.exe). This connection is used as soon as a user logs into Tabs3 and is open until the last person logs out of Tabs3. All users use the same instance of T3Accel.exe.

PracticeMaster Accelerator

The PracticeMaster Accelerator uses one connection (PMAccel.exe). This connection is used as soon as someone logs into PracticeMaster and is open until the last person logs out of PracticeMaster. All users use the same instance of PMAccel.exe.

HotBackup

The HotBackup (STHB.EXE) actually uses two connections. These two connections are only used when a HotBackup is being created. One connection is used to perform the HotBackup. The second connection is used to monitor the HotBackup.

Tabs3 Connect

Tabs3 Connect (T3Connect.exe) uses one connection. This connection is used when Tabs3 Connect is enabled and remains in use until Tabs3 Connect is disabled. All users use the same instance of T3Connect.exe.

Determining Number of Connections Needed

For example, suppose a firm has 5 users. All 5 users have PracticeMaster running at the same time (i.e., 5 connections), 3 of the same users also have Tabs3 running (i.e., 3 more connections), and 1 of the users also has APS and TAS running (i.e., 2 more connections). With the 5 additional connections required by the Platinum Server, this results in 15 combined Tabs3 and PracticeMaster Platinum software connections running at the same time on the network (5 + 3 + 2 + 5 overhead = 15). In order for this to occur, the firm would need to have a minimum server connection level of 16.

Computer Requirements

The following is required for the Platinum Server computer:

- Platinum Server software.
- Platinum versions of the software (i.e., 90000 series serial numbers).
- A multi-core processor is recommended.
- The network must use the TCP/IP protocol.

- 2 GB RAM is the minimum recommended memory for the Platinum Server.
- Ensure that plenty of free disk 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 disk space for the entire data set.
- **Windows Server:** Microsoft Windows Server 2012 R2. Microsoft Windows Server 2012, Microsoft Windows Server 2008/2003 (either 32-bit or 64-bit version), Windows Server 2008 R2, Windows Small Business Server 2011/2008/2003 (either 64-bit or 32-bit version), Windows 8, or Windows 7. Recommended that all current Service Packs be installed. A 64-bit operating system is required for Platinum SQL Server.
- **Workstation:** Windows 8/7/Vista/XP. Recommended that all current Service Packs be installed.
- **Platinum Exchange Connector:** If using the Platinum Exchange Connector, refer to Knowledge Base Article [R11596](#), "Configuring the PracticeMaster Platinum Exchange Connector" for specific installation requirements.
Note: When running the Platinum Server on a non-server operating system (i.e., Windows 8/7), you are limited to the number of concurrent connections and may exceed the connection limit in that operating system.
Note: Running Platinum Server under Windows Vista is not recommended.
- High speed wired network recommended for multi-user versions. Wireless networks are not recommended due to performance and reliability issues.

Requirements in a Nutshell

Platinum 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. While 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 1.5 GB on a 32-bit server and 3 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 disk space to hold copies of the entire data set. You control the number of copies to keep but you must have room to hold at least three full copies.
- The faster the server's disk subsystem is, the less time it takes to perform a HotBackup. Also, for best HotBackup performance, configure the source and destination folders on different spindles (i.e., drives).
- A Microsoft Server operating system is recommended (e.g., Microsoft Windows Server 2012 or 2008). Using a non-server operating system such as Windows 8 or Windows 7 will work, but they were not designed as a server operating systems and have some limitations, such as concurrent connections.

Additional information regarding performance optimization can be found on page 60.

Getting Started

Installing Platinum Server and Platinum Software

Installing Platinum Server is simple and consists of installing the Platinum version of the Tabs3 and PracticeMaster software, and installing the Platinum Server software. The following installation process installs all of the required software at the same time.

Installing Tabs3 & PracticeMaster Software - Platinum Version

The Version 17 Tabs3 and PracticeMaster software CD contains all of the Tabs3 and PracticeMaster the programs and Platinum Server, which makes installing Platinum versions of the software simple. This software must be installed from the server. The installation instructions provided with the software include additional details regarding how to install the Tabs3 and PracticeMaster software.

Important: When installing Platinum Server, the Platinum Server software must be installed from the server itself. Additionally, you must be logged in as an Administrator.

► To install the Platinum Server software

1. Insert the Tabs3 and PracticeMaster CD into the CD drive.
2. A CD Browser program will automatically start.

Note: If the CD Autorun feature is disabled, click the **Start** button, and then click **Run**. Click the **Browse** button and navigate to the CD drive. Double-click the **LAUNCH.EXE** file. Click **OK**.

3. Click **Next**, then click **Install Version 17 Software**. Follow the on-screen instructions to install the software.

Note: When specifying the location, use the local drive designation; do not use a mapped drive or network drive designation. UNC paths are not allowed.

4. After all files have been installed, you will be given the option to install Platinum Server as a Windows service (*page 20*). For performance reasons, it is strongly recommended that Platinum Server be installed as a service.

What's Next?

Now that you have installed the Platinum version of the Tabs3 and PracticeMaster software you will need to do the following:

If you allowed the installation program to install Platinum Server as a Windows service, then it is currently running and does not require any configuration.

If you did not allow the installation program to install Platinum Server as a Windows service, it is recommended that you install it as a Windows service now (*page 20*). If you prefer to not install Platinum Server as a Windows service (not recommended), you will need to start Platinum Server manually (*page 25*).

You will need to verify that the ports required by STI Director and the Tabs3/PracticeMaster Accelerators are not blocked by a firewall on the server computer. See the following "Information About Ports" section (*page 13*) for additional information.

You will need to configure the HotBackup settings, including the location and number of HotBackups to keep. These settings are located in the System Configuration program, on the HotBackup Folder tab of the Platinum Server Configuration window (**Platinum | Platinum Server Configuration**). See the HotBackup section (*page 38*) for more information.

You will need to configure Tabs3 Connect. Complete step-by-step instructions can be found in our Knowledge Base in Article [R11480](#) - "All About Tabs3 Connect."

Information About Ports

A firewall is a software program or hardware device that secures your computer by blocking incoming network communications. A firewall can be thought of as a literal wall between your computer and other computers. These other computers may be located on your own network or on the Internet. The wall protects your computer by blocking all network communications coming from outside the wall. However, there are certain communications that you probably want to receive, such as e-mail messages, web pages, or files from other computers on your network. To allow these

communications to pass through, ports are used by the firewall to control access to your computer. A port is like a small hole in the wall, allowing only specific communications to pass through.

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 (page 48) and the Tabs3/PracticeMaster Accelerators (page 5). For this reason, and because you still want to maintain the integrity of your protective wall, ports are used by these Platinum Server components.

Technically, a port is a specific network identification or “address” assigned to a program. Ports are used to route TCP/IP network traffic to different programs. 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 Tabs3/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**) (Figure 18).

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

- **Port 1621** - Tabs3 Connect (Outgoing only, normally open by default.)
- **Port 1779** - STI Director
- **Port 1780** - Tabs3 Accelerator
- **Port 1781** - PracticeMaster Accelerator
- Port varies - Platinum Server

Opening these ports will allow STI Director and the Tabs3/PracticeMaster Accelerators to receive necessary communications from the workstations on the network. Additional information, including specific information on Windows Firewall can be found in our Knowledge Base in Article [R11197](#) - “Opening Ports in Windows Firewall” at www.support.Tabs3.com.

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.

How Platinum Server Treats Paths

When using Platinum Server and working with a Tabs3 application that is reading or writing *.DAT and *.IDX files, paths are now relative to the server whereas before they were relative to the client. This is an important distinction that can cause problems in certain areas of the software—particularly with installations that were previously running successfully without Platinum Server.

This issue only applies when creating validation files in Tabs3 for Tabs3 Remote (**Maintenance | Integration | Create Validation Files**).

For example, let's say you create Tabs3 Remote Validation files directly to a flash drive on your workstation. When specifying the location where you want the files created, you have always specified "E:". If you specify "E:" with the Platinum version of the software, Platinum Server will try to write the files to the E drive on the computer where Platinum Server is located.

This can be confusing when using the **Browse** button to drill-down to the desired directory, since the drive letters will reflect the workstation's directory structure. However, when Platinum Server receives the request, it will use the server's directory structure instead of the client's directory structure.

Be aware that paths are not an issue when working with non *.DAT/*.IDX files. For example, if a workstation saves a report to A:\REPORT.TXT, the file will be written to the workstation's drive "A:" as expected. As another example, if a workstation exports a PracticeMaster Calendar Plan Template file (*.TPL) to C:\TEMP\CPT.TPL, the file will be written to the workstation's drive "C:\TEMP" folder as opposed to the server's drive "C:\TEMP".

The Solution

Using an intermediate exchange directory will help you avoid this confusion when creating validation files.

Intermediate Exchange Directory

Instead of writing directly to the target location, use an empty directory as an exchange directory. When specifying the directory, use a relative path.

For example, let's say you are using Tabs3 Remote and want to send validation files to your laptop. Set up a directory named "Remote" under the current working directory. (Make sure the directory is empty. If there are multiple users, it may be necessary to include the user's name or initials in the directory name, i.e., "Remote_JOE".) When you create the validation files, select the Remote directory by typing "Remote\". Platinum Server will write the data files to the Remote folder under the current working directory. Next, transfer the contents of the directory to the current working directory on the laptop. The manner in which this is accomplished depends on whether the laptop can connect to the network, how large the files are, whether e-mail capabilities are available on both computers, etc. If the laptop can attach to the network, simply copy the contents to the current working

directory on the laptop. If the laptop cannot connect to the network, transfer the contents to a flash drive and then copy the contents on the flash drive to the laptop computer. If both computers have e-mail capabilities, a simple alternative is to use the compress option when you check out the files and then e-mail the file as an attachment.

Note: Do not use a colon (:) when specifying the file path. Instead, use an *intermediate exchange directory* as described above. This will ensure the files are extracted to the correct location when creating validation files.

Files Installed

When Platinum Server is installed, the following files are installed into the program directory unless otherwise indicated:

STDIRECT.EXE	This file is the STI Director executable. It is installed into the Windows directory (e.g., C:\WINDOWS).
STDIRECT.CPL	This file is the STI Director Control Panel file. It is installed in the Windows System directory (e.g., C:\WINDOWS\SYSTEM32).
T3ACCEL.EXE	This file is the Tabs3 Accelerator executable.
T3CONNECT.EXE	This file is the Tabs3 Connect executable.
STHB.EXE	This file is used to run the HotBackup function.
HBRESTORE_XE CTRDMP_XE	These files are used to run the HotBackup Restore function.
F_TCPIP.DLL	This DLL file is used for communicating with workstations across a network using the TCP/IP protocol.
FSHAREMM.DLL	This DLL file is used for communicating between Platinum Server and the Accelerators.
C-TREEACEVSSWRITER.DLL	This DLL file is used to register the Platinum Server with the Windows Volume Shadow Copy Service (<i>page 60</i>).

CTSRVR.CFG
STSRVR.CFG

These files represent the server configuration files. Additional details regarding these files can be found on page 52.

CTSRES.DLL
CTSRMC.DLL

These DLL files are used by Platinum Server.

Platinum Server Data Files

***.FCS**

During the course of operation, Platinum Server creates various *.FCS files in the program directory that are used by Platinum Server. Do not delete these files. All of the *.FCS files are unreadable (i.e., binary), with the exception of the CTSTATUS.FCS file.

CTSTATUS.FCS

This file is a log file that tracks critical information concerning the status of Platinum Server, such as when it started, whether any error conditions have been detected, whether it shuts down properly, etc. The information is saved in chronological order, and can be useful for troubleshooting purposes. It is located in the program directory, and is viewable via a text editor such as Notepad.

Security

A password is not required to start Platinum Server. If Platinum Server is shut down via the Desktop Interactive Program (page 20), you will be prompted for an Administrator User ID and Password. For this situation, you can enter "STADMIN" in both the **Administrator User** and **Password** fields. (*Note: The password is case sensitive.*)

Security and access rights for the Tabs3 and PracticeMaster software are handled directly via the Tabs3 and PracticeMaster software. Additional access rights can be defined for the Platinum SQL Server for ODBC access.

Back Up Strategy

The HotBackup feature included with Tabs3 and PracticeMaster Platinum software safely backs up data files even when users are actively updating data. Restoring a HotBackup provides the ability to quickly roll back your Tabs3 and PracticeMaster data to a certain point in time. However, since

HotBackup does not back up every file in the Tabs3 program directory, it is important to also use a third-party backup to back up your Tabs3 program directory and HotBackup directory for purposes of recovering from a complete failure, such as a server hard drive failure.

Using Other Backup Methods

When using a method other than HotBackup to make a backup, there are several issues that must be considered. In order for third-party backup software to create a successful backup, the following must be observed:

- All users MUST exit the software.
- All data files must be backed up at the same time.
- You must shut down the Platinum Server before running the backup.

It is possible to implement a third-party backup that allows for users to be in the Tabs3 and PracticeMaster software during the backup. This type of backup requires a strategy that uses a third-party backup and HotBackup together; it also may require restoring from both a third-party backup and a HotBackup in the event it is necessary to restore. Detailed information regarding these options can be found in our Knowledge Base on the Internet at www.support.Tabs3.com in KB Article [R11213](#).

Scheduling Backups

When scheduling backups, it is important to observe the following:

- Schedule backups to eliminate situations where a HotBackup is being performed at the same time as a third-party backup is being performed.
- We recommend scheduling a HotBackup before a third-party backup is performed. For example, if your third-party backup starts at 2:00 a.m. and your HotBackup takes less than 30 minutes, schedule a HotBackup at 1:00 a.m..

Knowledge Base and Other Resources

The following is a list of additional resources available regarding Platinum software.

Knowledge Base

The Knowledge Base includes specific information regarding Platinum Server Software. The Knowledge Base requires Internet access and can be found on the Internet at:

www.support.Tabs3.com

KB Article [R11406](#) includes a comprehensive list of Platinum articles. The following is a partial list of additional information available.

Platinum Related Articles

- [R11379](#) - Platinum Software Overview
- [R11406](#) - Tabs3 and PracticeMaster Platinum Resources
- [R11480](#) - All About Tabs3 Connect
- [R11175](#) - Transaction Processing
- [R11386](#) - Platinum Troubleshooting and Technical Information
- [R11182](#) - Tabs3 and PracticeMaster Accelerators
- [R11193](#) - HotBackup Overview
- [R11199](#) - Restoring a HotBackup
- [R11405](#) - Platinum Frequently Asked Questions
- [R11213](#) - Backup Strategy
- [R11400](#) - Outlook Integration Guide (Exchange Connector information)
- [R11427](#) - Configuring the PracticeMaster Platinum Exchange Connector

Help Topics

The Help provided with the System Configuration program contains detailed information regarding Platinum Server configuration programs.

Platinum Related Topics

- Platinum Server Configuration
- Tabs3 Connect Administration Window
- HotBackup
- HotBackup Vault
- Restore HotBackup
- PracticeMaster Exchange Connector
- Initialize SQL (Platinum SQL only)
- Initialize SQL Profiles (Platinum SQL only)

Technical Support

During working hours you can always get immediate assistance from qualified technicians who have been specifically trained to answer your questions.

Technical Support

Phone: (402) 419-2210

Hours: 8:00 a.m. to 5:00 p.m. (Central Time)

Monday through Friday

Operating Platinum Server

This chapter discusses various ways of operating the Platinum Server, and provides details on how to install and configure Platinum Server as a Windows service.

Note: During the installation, if you selected the option to **Install Platinum Server as a Windows Service**, Platinum Server will already be installed and running as an automatic Windows service. You can verify this by checking the status of the STI Server Service (*page 27*).

Operating Platinum Server as a Service for Windows

Windows supports a special type of process known as a service. A service is a background process that receives special treatment from the operating system. Services may be configured to start automatically at system startup or to start manually by a user. Services typically have no user interface and can continue to run even when no users are logged on to the system. The operating system automatically terminates services at system shutdown or a user can manually terminate them.

For performance reasons, it is recommended that Platinum Server be run as a Windows service. The Windows services for the Platinum Server is also referred to as the STI Server Service. The **STI Server Service** features all of the capabilities and advantages of Windows services described above. As with any service, the STI Server Service will run in the background, will shut down automatically when Windows shuts down, and can be configured to start automatically when Windows starts up.

When Tabs3 and PracticeMaster Platinum software is installed from the CD, an option is provided to automatically install it as a Windows service as shown in Figure 2. This option is selected by default and if left unchanged, the Platinum Server will be running successfully as a service and the rest of this chapter can be skipped. However, if this option was not selected, the SC.EXE command-line utility program can be used to install it as an automatic service.

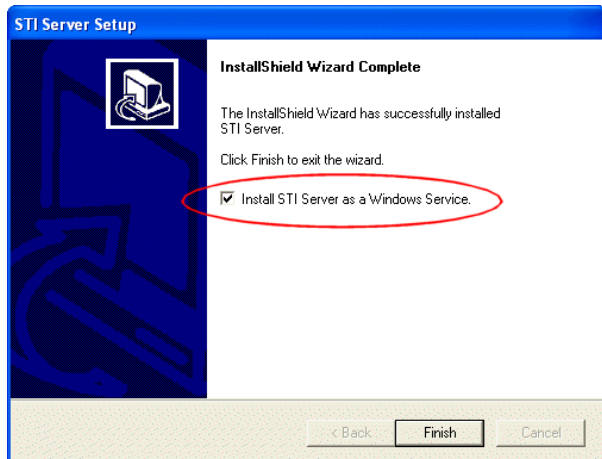


Figure 2, Installation Option

Accelerator Note: Tabs3 and PracticeMaster Accelerator technology (including Tabs3 Connect) will perform faster when Platinum Server is run as a Windows Service. This is because when the Platinum Server and Accelerators are run as services, they are able to use the shared memory protocol for communications instead of the TCP/IP protocol, which is significantly faster.

SC.EXE Command-Line Program

SC.EXE is a command line utility used for managing services that is included with Microsoft Windows. SC.EXE is run from the Platinum server, and uses the following format for commands:

```
sc <Command> "<Service Name>" <Options>
```

The command-line syntax consists of three or more components: the SC executable, a command, and the service name (required). The command is a single entry selected from the table below.

The following commands are available:

create	Create the service.
delete	Delete the service
query	Show current status of the service.
qc	Show current configuration of the service.
config	Configure the service.
start	Start the service
stop	Stop the service.

Installing the STI Server Service

Although Platinum Server can be run manually from a command-line utility or via the Desktop Interactive Program, for performance reasons, we strongly recommend installing Platinum Server as a Windows service. This is typically done when the Platinum software is installed. Reinstalling the Platinum software will also install the Platinum Server as a service. The following instructions are provided in case the STI Server Service needs to be installed manually.

► To install Platinum Server as a Windows Service

Note: You must be an Administrator when performing the following procedure.

1. From the Platinum Server computer, open a command-line window (**Start | Programs | Accessories | Command Prompt**).
3. Type the following command:

```
sc create "<STI Server Service>" binPath= C:\Tabs3\ctsrvr.exe start= auto
```

Note: The <STI Server Service> represents the name of the service. The value for binPath is the location of ctsrvr.exe on your server's **local** drive.

- The message "[SC] CreateService SUCCESS" will be displayed.

Note: If Platinum Server is already installed as a Windows service, the message "[SC] CreateService FAILED 1073: The specified service already exists" will be displayed instead.

Configuring the STI Server Service

Although Platinum Server can be started and stopped manually, we recommend that the service be configured to start automatically. This allows the STI Server Service to automatically start and shut down with Windows. The STI Server Service is configured to start automatically when configured by the Platinum installer or the command line method. If the STI Server Service is not starting automatically, the following methods can be used to change its configuration:

► To configure the STI Server Service from a Command Prompt window

- From the Platinum Server computer, open a command-line window (**Start | Program | Accessories | Command Prompt**).
- To determine the current startup configuration of Platinum Server, type the following command:

```
sc qc "STI Server Service"
```

A message similar to the following will be displayed, with the line for "Start Type" indicating the current startup configuration of Platinum Server:

```
[SC] QueryServiceConfig SUCCESS

SERVICE_NAME: STI Server Service
        TYPE               : 10  WIN32_OWN_PROCESS
        START_TYPE          : 3   DEMAND_START
        ERROR_CONTROL       : 1   NORMAL
        BINARY_PATH_NAME    : C:\Tabs3\ctsrvr.exe
        LOAD_ORDER_GROUP    : None
        TAG                 : 0
        DISPLAY_NAME        : STI Server Service
        DEPENDENCIES        : None
        SERVICE_START_NAME  : LocalSystem
```

- Type the following command to set the STI Server Service to start automatically:

```
sc config "<STI Server Service>" start= auto
```

Note: The <STI Server Service> represents the name of the service.

- The message “[SC] ChangeServiceConfig SUCCESS” will be displayed.

► **To configure the STI Server Service from the Services Applet**

- From the **Control Panel**, double-click **Administrative Tools** and then double-click **Services**. This will open the Services Applet (Figure 3).
- Right-click the **STI Server Service** and select **Properties** to open the STI Server Services Properties window (Figure 4).
- On the **General** tab, change the **Startup type** to “Automatic.”
- Click **OK** to close the Properties window.
- In the Services Applet window, the **Startup Type** column for the STI Server Service will be shown as “Automatic.”

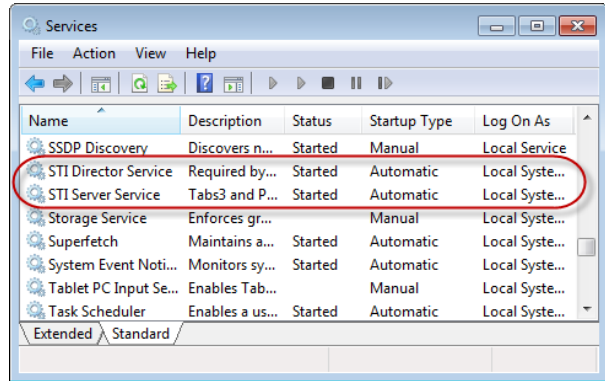


Figure 3, Services Applet

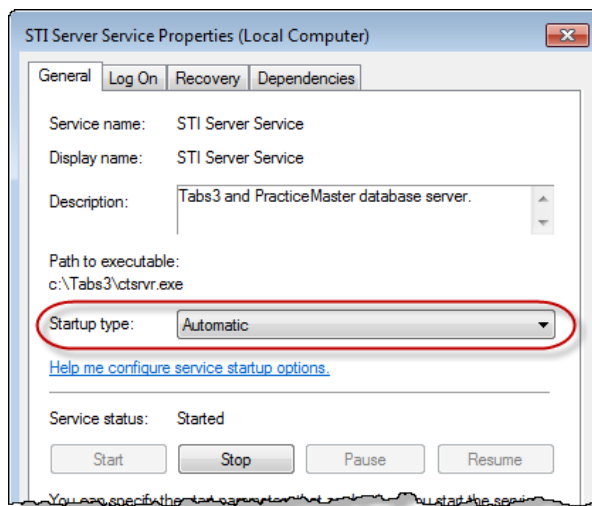


Figure 4, STI Server Service Properties window

Desktop Interactive Program

The Desktop Interactive Program is the Windows GUI (Graphical User Interface) version of Platinum Server. It can be run by executing the CTSRVR.EXE file, which also starts the Platinum Server. In addition to running the Desktop Interactive Program this way, the STI Server Service can also be configured to display it whenever it is started.

► To configure the STI Server Service to display the Desktop Interactive Program

1. From the **Control Panel**, double-click **Administrative Tools** and then double-click **Services**.
2. Right-click the **STI Server Service** and select **Properties**.
3. On the **Log On** tab, select the **Allow service to interact with desktop** option.
4. Click **OK** to close the Properties window.

By default, the Desktop Interactive Program displays the Message Monitor window (Figure 5), which provides Platinum Server connection information. The Desktop Interactive Program can also be used to stop the Platinum Server (*page 25*).

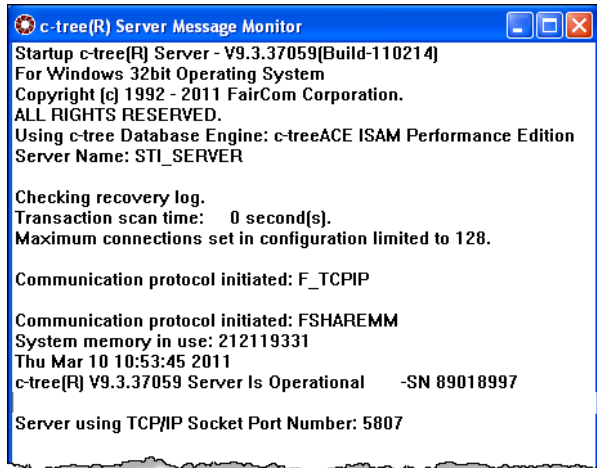


Figure 5, Message Monitor window

Message Monitor Window

The Message Monitor window is displayed by default when running the Desktop Interactive Program. This window is useful for viewing the number of current connections to Platinum Server, and can also be helpful in displaying a visual confirmation that Platinum Server is indeed functioning. The Message Monitor window can be closed at any time without affecting Platinum Server. To display it again, from the Desktop Interactive Program select **View | Message Monitor Window**.

Note: Implementing the DIAGNOSTICS LOGON_COMM configuration setting (*page 44*) will cause additional information to be displayed in this window.

Starting Platinum Server

Once Platinum Server has been configured as an automatic Windows service, Platinum Server will automatically start whenever Windows is started on the server computer. However, Platinum Server can also be started using one of the following methods.

Note: Platinum Server can only be started from a Command Prompt window or from the Service Applet if it has already been installed as a Windows service.

► To start Platinum Server from the Services Applet

1. From the **Control Panel**, double-click **Administrative Tools** and then double-click **Services**.
2. Right-click the **STI Server Service** and select **Start**.

► To start Platinum Server from a Command Prompt window

1. From the Platinum Server computer, open a command-line window (**Start | Program | Accessories | Command Prompt**).
2. Type the following command:

```
sc start "<STI Server Service>"
```

Note: The <STI Server Service> represents the name of the service.

3. A message similar to the following will be displayed.

```
SERVICE_NAME: STI Server Service
      TYPE                : 10  WIN32_OWN_PROCESS
      STATE                 : 2  START_PENDING
                          (NOT_STOPPABLE, NOT_PAUSABLE, IGNORES_SHUTDOWN)
      WIN32_EXIT_CODE       : 0  (0x0)
      SERVICE_EXIT_CODE    : 0  (0x0)
      CHECKPOINT           : 0x0
      WAIT_HINT             : 0x0
```

► To start Platinum Server via the Desktop Interactive Program

1. Using Windows Explorer, navigate to the directory where Platinum Server is installed.
2. Double-click the CTSRVR.EXE file.

Stopping Platinum Server

The following methods can be used to stop Platinum Server.

Note: Platinum Server can only be stopped from a Command Prompt window or from the Service Applet if it has already been installed as a Windows service.

Warning: Stopping Platinum Server when active connections are present can cause data corruption. It is strongly recommended that all users exit all Tabs3 and PracticeMaster Platinum software before stopping Platinum Server. Stopping Platinum Server from the Desktop Interactive Program is the only method that warns you of active connections before Platinum Server is stopped.

► **To stop Platinum Server from the Services Applet**

1. From the **Control Panel**, double-click **Administrative Tools** and then double-click **Services**.
2. Right-click the **STI Server Service** and select **Stop**.

► **To stop Platinum Server from a Command Prompt window**

1. From the Platinum Server computer, open a command-line window (**Start | Program | Accessories | Command Prompt**).
2. Type the following command:

```
sc stop "STI Server Service"
```

Note: The <STI Server Service> represents the name of the service.

3. A message similar to the following will be displayed.

```
SERVICE_NAME: STI Server Service
TYPE           : 10  WIN32_OWN_PROCESS
STATE          : 3   STOP_PENDING
                (STOPPABLE, NOT_PAUSABLE, ACCEPTS_PRESHUTDOWN)
WIN32_EXIT_CODE : 0   (0x0)
SERVICE_EXIT_CODE : 0 (0x0)
CHECKPOINT     : 0x0
WAIT_HINT      : 0x0
```

► **To stop Platinum Server from the Desktop Interactive Program**

1. From the Desktop Interactive Program, select the **Control** menu.
2. Select **Shutdown**.
3. You will be prompted for an Administrator User ID and Password. Enter "STADMIN" in both the **Administrator User** and **Password** fields, then click **OK**.

Note: The password is case sensitive.

4. A message will be displayed indicating the number of users currently logged on. This represents the number of active connections present. Click **OK** to confirm you want to stop Platinum Server.

Displaying the Status of the STI Server Service

The current status of the STI Server Service can be determined using one of the following methods.

► To display the current status of Platinum Server from the Services Applet

1. From the **Control Panel**, double-click **Administrative Tools** and then double-click **Services**.
2. Highlight the **STI Server Service**. The **Status** column will show "Started" if the server is running. Otherwise, it will be blank if the server is not running.

Note: You may need to refresh the Computer Management window (**Action | Refresh**) to update the status of the STI Server Service.

► To display the current status of Platinum Server from a Command Prompt window

1. From the Platinum Server computer, open a command-line window (**Start | Program | Accessories | Command Prompt**).
2. Using the DOS "CD" command, change to the directory where Platinum Server and the Tabs3 and PracticeMaster Platinum software are installed.
3. Type the following command:

```
sc query "<STI Server Service>"
```

Note: The <STI Server Service> represents the name of the service.

4. A message similar to the following will be displayed.

```
SERVICE_NAME: STI Server Service
    TYPE               : 10  WIN32_OWN_PROCESS
    STATE               : 4   RUNNING
                       (STOPPABLE, NOT_PAUSABLE, ACCEPTS_PRESHUTDOWN)
    WIN32_EXIT_CODE     : 0   (0x0)
    SERVICE_EXIT_CODE  : 0   (0x0)
    CHECKPOINT         : 0x0
    WAIT_HINT          : 0x0
```

Troubleshooting

This section identifies possible problems that may be encountered when starting Platinum Server, and ways to solve them. Additional troubleshooting information, including possible error messages, can be found in our Knowledge Base in Article [R11386](#) - "Platinum Troubleshooting and Technical Information" at

www.support.Tabs3.com

Problems Starting the STI Server Service

If the STI Server Service fails to start, it returns a service-specific error, and logs a message to the Windows application event log. This information can be used to diagnose problems with the STI Server Service. The following is an example of the output from a failed startup when starting the STI Server Service using the command-line utility. The service-specific error is displayed as the "SERVICE_EXIT_CODE".

```
SERVICE_NAME: STI Server Service
TYPE           : 10  WIN32_OWN_PROCESS
STATE          : 1  Stopped
WIN32_EXIT_CODE : 0  (0x0)
SERVICE_EXIT_CODE : 2  (0x2)
CHECKPOINT     : 0x0
WAIT_HINT      : 0x0
```

Figure 6 lists service-specific error codes returned by the STI Server Service, the cause, and a resolution for each error.

Error Code	Cause	Resolution
0	Platinum Server is already running via the Desktop Interactive Program (<i>page 24</i>).	Shut down the Desktop Interactive Program, and start the service again.
2	The required CTSRVR.CFG file is invalid (<i>page 52</i>), usually due to editing it via a word processor instead of a text editor.	Rename the existing CTSRVR.CFG file, and reinstall the Platinum Server Software to create a new CTSRVR.CFG file.

Figure 6, STI Server Service Errors

Problems Starting the Desktop Interactive Program

If an error occurs when attempting to start the Desktop Interactive Program, the message "Server Operation Now Stopped" will be displayed. This message is displayed for one of the following reasons.

- The STI Server Service is currently running.
- The required CTSRVR.CFG file located in the Tabs3/PracticeMaster program directory is invalid, usually due to editing it via a word processor instead of a text editor.

If the STI Server Service is currently running, it must be stopped before attempting to start Platinum Server via the Desktop Interactive Program. If the required CTSRVR.CFG file is invalid, rename it and reinstall the Platinum Server software to create a new CTSRVR.CFG file.

Operating Platinum SQL Server

This chapter discusses how to configure the Platinum SQL Server software to provide data to third party programs, as well as how to install and configure the FairCom c-treeACE ODBC drivers.

The Platinum SQL Server makes all of the Tabs3 and PracticeMaster software data files accessible via an ODBC capable SQL server. ODBC capability allows you to retrieve information from the program data files; however, you cannot write information to the program data files via an ODBC driver, as writing directly to the program data files would corrupt the data. Both 32-bit and 64-bit ODBC drivers are included with the Platinum SQL software. These ODBC drivers are written by FairCom Corporation, the manufacturer of the c-tree file storage method used by the Tabs3 and PracticeMaster software.

Initializing the SQL Database

Prior to accessing the Platinum SQL Server, the SQL database must be linked to the existing Tabs3 and PracticeMaster database. This is done using the Initialize SQL function in System Configuration.

► To initialize the SQL database

1. Perform a Data File Integrity Check in each of the following programs that are installed to ensure that all files have been created:
 - Tabs3
 - PracticeMaster
 - TAS
 - APS
 - GLS (for each GLS client)
2. Have all users exit the Tabs3 and PracticeMaster software.
3. Launch System Configuration.
4. From the **Platinum** menu, select **Initialize SQL**.
5. Click the **OK** button.

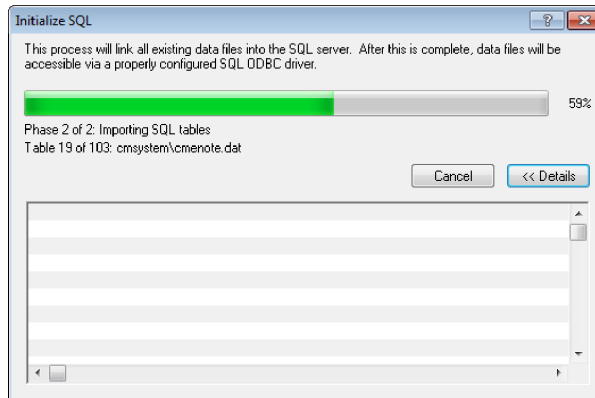


Figure 7, Initialize SQL

- When the process is complete, click **OK**.

Note: This process must be run after any changes are made to the Tabs3 and PracticeMaster data structure, such as after a conversion, or whenever changes are made in PracticeMaster File Maintenance.

Configuring User Rights

This section outlines the steps needed to configure an Access Profile to access the Platinum SQL Server. Each program has its own SQL right in the Access Profile. Users that will be accessing data via the Platinum SQL Server must be assigned to an Access Profile with SQL rights enabled for the databases they will be using.

Note: SQL access rights are not included in the MANAGER Access Profile. Any users assigned to this profile that will be accessing the Platinum SQL Server will need to be assigned an additional Access Profile with appropriate SQL rights. You may want to consider creating one or more Access Profiles that only relate to SQL rights, and assigning those to users who need SQL access in addition to their existing access profiles.

► To configure an Access Profile for SQL access

- Launch System Configuration, and select **File | Open | Access Profile**.
- Click the **Access ID** drop down and select the access profile you want to edit from the list.
- From the **System Activity** tab, select the **SQL Access to System Config Files** check box to enable access to the System Configuration database.

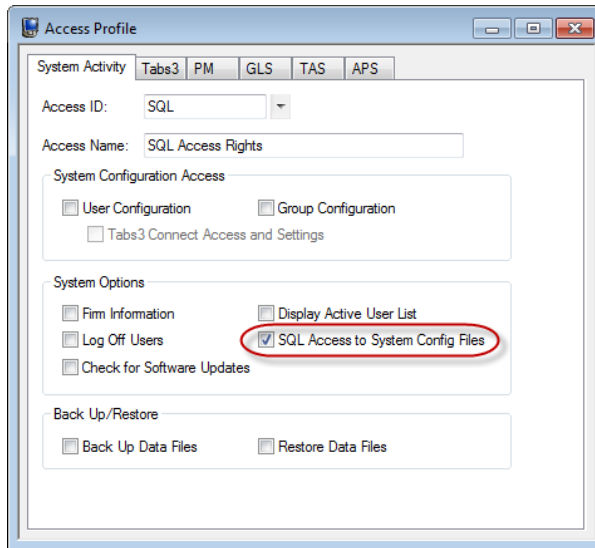


Figure 8, System Activity Tab

- For Tabs3, PracticeMaster, GLS, TAS, and APS, click the appropriate tab and select the **Utilities/View** group in the first box that includes a list of groups of functions.

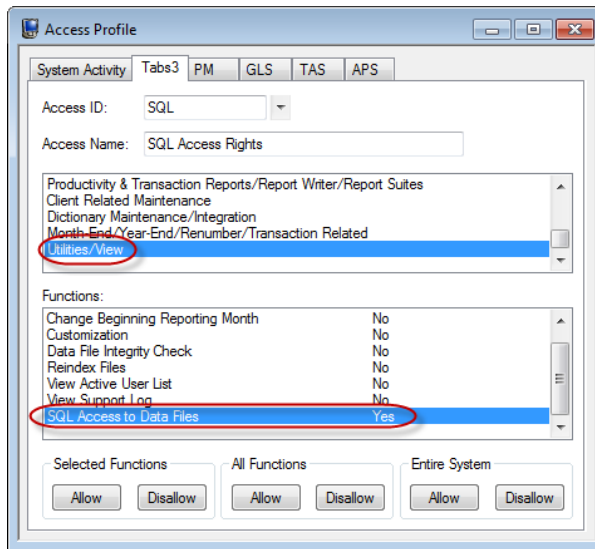


Figure 9, SQL Access Rights

- Select **SQL** in the lower box that includes the list of functions, and click the **Allow** button under **Selected Functions**.

Initializing SQL Profiles

Once the SQL database has been initialized and the Access Profiles configured, the **Initialize SQL Profiles** function must be run in System Configuration. This process applies the Access Profile settings for each user to the SQL database, allowing it to determine which users have access to which data tables (i.e., files).

► To initialize the SQL profiles

1. Launch System Configuration.
2. From the **Platinum** menu, select **Initialize SQL Profiles**.
3. Click **OK**.
4. When the process is complete, a window similar to the following will display any errors encountered.

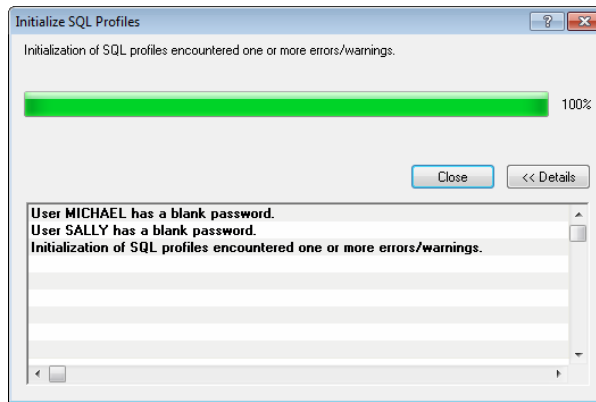


Figure 10, Initialize SQL Profiles

If any errors are encountered, resolve them and then run the Initialize SQL Profiles process again.

Note: Whenever changes are made to the Users or Access Profiles that will affect SQL access, you will be prompted to re-initialize the SQL profiles in order for those changes to take effect.

Installing the ODBC SQL Drivers

The c-treeACE ODBC driver allows other programs to access the Platinum SQL Server. Each computer that will be used to access the Platinum SQL database must have this driver installed. Platinum SQL includes both 32-bit and 64-bit versions of the ODBC driver. For computers running a 32-bit operating system, you can only install 32-bit version of the driver. For 64-bit operating systems, install both drivers to ensure compatibility with both 32-bit and 64-bit software. For example, a

workstation running Windows 7 64-bit may have the 32-bit version of Microsoft Excel 2010. In this case, the 32-bit ODBC driver must be installed in order for Excel to access the Platinum SQL database.

► **To install the ODBC SQL Driver(s)**

1. From the workstation on which you are installing the driver, access the current working directory on the server. *(Note: The location of the current working directory can be determined by selecting **Help | About** in any **Tabs3** and **PracticeMaster** program on the workstation.)*
2. Open the **SQL_Extras** folder in the current working directory.
3. Double-click **ODBC_SQL_32.msi** and proceed with the installation. When the installation is complete, click **Finish**.
4. Double-click **ODBC_SQL_64.msi** and proceed with the installation (64-bit operating systems only). When the installation is complete, click **Finish**.

Once you have installed the drivers, you can proceed with configuring your ODBC Data Source.

Configuring the ODBC Data Source

The following steps will help you set up an ODBC Data Source to extract information from **Tabs3**, **PracticeMaster**, **GLS**, **TAS**, **APS**, or **System Configuration**, as well as help with troubleshooting any issues you may have configuring the ODBC Data Source.

Prior to configuring an ODBC Data Source, you must complete the previous steps found in this chapter.

► **Preliminary Steps**

1. Initialize the SQL database (*page 29*).
2. Configure User Rights for any users that will be accessing the SQL database, including users with manager rights (*page 30*).
3. Initialize SQL Profiles (*page 32*).
4. Install the ODBC Drivers — 32-bit and 64-bit (*page 32*).

► **To configure the ODBC Data Source**

1. Start the ODBC Administrator (**Start | Control Panel | Administrative Tools | Data Sources**).
2. Select the **User DSN** tab (usually selected by default). If you will be accessing the data source from an MS SQL Linked Server, select the **System DSN** tab.

3. Click **Add**.
4. From the driver list, select **c-treeACE ODBC Driver** and click **Finish**.

Note: If **c-treeACE ODBC Driver** is not displayed, verify that you have installed the ODBC Drivers before proceeding (*page 32*).

Figure 11, c-treeACE ODBC Setup

5. For the **Data Source Name**, enter something recognizable, such as "Tabs3".
6. For the **Description**, enter a description for this data source (*user's choice*).
7. In the **Host** field, enter the IP Address or name of the server computer.
8. For the **Database**, enter "Tabs3" (no choice).
9. For the **User ID** and **Password** fields, enter your Tabs3 and PracticeMaster User ID and Password in all uppercase.

Note: The **User ID** and **Password** fields can be left blank, however you will be prompted for the **User ID** and **Password** when accessing Tabs3 and PracticeMaster data via the Platinum SQL Server. The **User ID** used will determine which programs' data will be available. (*See Configuring User Rights on page 30.*)

10. In the **Service** field, enter "6597" (*no choice*).

Note: If your firm has changed the Platinum SQL Server port, you will need use the assigned port number instead.

11. In the **Preserve Cursor** field, select "OFF".

Note: This field is blank for the 64-bit version.

12. In the **Client Character Set** field, select "'ASCII" ASCII or ISO8859-1(CP1252)'.
13. In the **Options** field, enter "DHQQII" (all uppercase).
14. Click **OK**.

Accessing Platinum SQL from a Microsoft SQL Server

If you will be accessing the Tabs3 database from a Microsoft SQL Server using the Microsoft SQL Server Linked Server feature, there are additional configuration steps you will need to perform.

► Configuring MS SQL Management Studio

1. Configure an ODBC Data Source using the steps from the "To Configure the ODBC Data Source" section (*page 33*). (*Note: For Step 2 in this section, select the **System DSN** tab instead of the **User DSN** tab.*)
2. Start the Microsoft SQL Management Studio.
3. In the Object Explorer, open **Server Objects | Linked Servers**.
4. Right-click **Linked Servers** and select **New Linked Server...** to open the New Linked Server window.
5. In the **Select a page** pane, select **General**.
 - a. For the **Linked Server**, enter "Tabs3".
 - b. For the **Server Type**, select **Other data source**.
 - c. For the **Provider**, select **Microsoft OLE DB Provider for ODBC Drivers**.
 - d. For the **Product name**, enter "ODBC".
 - e. For the **Data source**, enter the name of your ODBC Data Source, as specified in Step 5 of the "To Configure the ODBC Data Service" section (*page 33*).
6. In the **Select a page** pane, select **Security**.
 - a. Select the **Be made using this security context** option.
 - b. In the **Remote login** field, enter your Tabs3 and PracticeMaster User ID in all uppercase.

- c. In the **With password** field, enter your Tabs3 and PracticeMaster Password in all uppercase.
7. In the **Select a page** pane, select **Server Options**.
 - a. Set the value for **RPC** to "True".
 - b. Set the value for **RPC Out** to "True".
 - c. Click **OK**.
8. In the Object Explorer, open **Server Objects | Linked Servers | Providers**.
 - a. Right click **MSDASQL** and select **Properties**.
 - b. Select the following check boxes under **Provider options**:
 - **Nested queries**
 - **Allow inprocess**
 - **Supports 'Like' operator**
 - c. Clear the following check boxes under **Provider options**:
 - **Dynamic Parameter**
 - **Level zero only**
 - **Non transacted updates**
 - **Index as access path**
 - **Disallow adhoc access**
 - d. Click **OK**.

► Sample Query

The following is an example of a valid query for accessing the Tabs3 database:

```
select * from Tabs3..admin.t3client
```

In this example, **Tabs3** is the Linked Server name specified in step 5a of the "Accessing Platinum SQL from a Microsoft SQL Server" section (*page 35*), and **admin.t3client** is the name of the table you are querying, which is the Tabs3 client file. This query retrieves all records from the Tabs3 client file.

Assigning a New Platinum SQL Server Port

By default, the Platinum SQL Server uses TCP port 6597. If there is another program on the Tabs3 and PracticeMaster data server that uses this port, you will need to change the assigned port for the Platinum SQL Server or for the other program. Below are the steps to change the assigned port for the Platinum SQL Server. You will be editing the STSRVR.CFG and CTSRVR.CFG files.

1. Select an unused TCP port. You may need to speak to your network administrator or information technology department to determine an appropriate port.

2. Edit the STSRVR.CFG file.
 - a. Open the STSRVR.CFG file found in the current working directory of your Tabs3 and PracticeMaster data server using a text editor such as Notepad.
 - b. Add a third line to the file in the following format: <Port>@<server>:TABS3. For example, to change the port to 6598 on a server named "firmserver" you would enter "6598@firmserver:TABS3" on the third line of STSRVR.CFG.
 - c. Save and close the STSRVR.CFG file.
3. Edit the CTSRVR.CFG file.
 - a. Open the CTSRVR.CFG file found in the current working directory of your Tabs3 and PracticeMaster data server using a text editor such as Notepad.
 - b. Add an additional line below the SQL_OPTION lines.
 - c. On the new line, enter SQL_PORT followed by a space, and the TCP port number you entered in Step 2b.
 - d. Save and close the CTSRVR.CFG file.
4. Restart the STI Server Service at the Tabs3 and PracticeMaster server.
5. From the Windows Control Panel, select Administrative Tools.
6. Double-click **Services**.
7. Right-click the **STI Server Service** from the list of services, and select **Restart**.
8. Close the Services program.

Note: If you change the Platinum SQL Server port, any existing ODBC Data Sources will need to be updated with the new port number in the **Service** field. Additionally, any new ODBC Data Sources will need to use the new port number instead of 6597 in the **Service** field.

Platinum SQL Performance Monitoring Utilities

Three performance monitoring tools are included in the Platinum SQL installation. These utilities are installed in the SQL_Extras\Unsupported directory of the current working directory on the Tabs3 and PracticeMaster server computer.

- **c-treeACEMonitor.exe** - a client tool designed to monitor and report Server activity. It can be useful to check events, configuration settings, connected users and much more.
- **c-treeGauges.exe** - a client-side utility designed to display a wide array of performance metrics for analyzing the performance of the Platinum Server.
- **c-treePerfMon.exe** - a tool designed to provide performance graphs showing Platinum data throughput activity.

Important Note: These utilities are provided for informational purposes only, and are not supported by Tabs3 and PracticeMaster technical support. FairCom documentation is included in the installation.

Note: These programs can be accessed from the server or your local workstation. If you will be accessing the programs from your workstation, we recommend copying the entire contents of the **Unsupported** directory to your workstation in order to retain access to the built-in help system.

When launching these utilities, you will be prompted for the following information:

Server Name: Enter "STI_SERVER". (If you have modified your server's name in STSRVR.CFG and CTSRVR.CFG, use that name instead.)

Machine Name: If you are accessing the program from the server, enter "localhost". If you are accessing the utility from another computer, enter the server's network name or IP address.

User Name: Enter "STADMIN".

User Password: Enter "STADMIN".

Note: You can configure c-treeACEMonitor to store the above information by selecting **AutoConnect** and **Remember Password** from the **Options** menu once you have successfully connected to the server. You will need to re-enter the information each time you use c-treeGauges and c-treePerfMon.

HotBackup

HotBackup Overview

HotBackup is a feature unique to Platinum software that allows all data files to be backed up while they are in use. In database terminology, data is considered "hot" when it is live and accessible to all users. Therefore, backing up data in this state is considered a "hot" backup.

Stand-alone and multi-user (i.e., non-Platinum) versions of the Tabs3 and PracticeMaster software include the Back Up Data Files program. This program is used to create a temporary backup of the data files for all software products installed in the program directory. HotBackup replaces the Back Up Data Files program with a significantly improved method of creating a temporary backup, and introduces several new features along with it.

The main highlights of HotBackup are as follows:

Background Processing	HotBackup has the ability to create a backup while users are accessing the data files. It does this in the background without interrupting any work in progress.
File and Folder Management	You can configure HotBackup to maintain as many backups as you want (up to 99), as well as the number of backups to archive (up to 99). In addition, you can define the location in which backups are stored.
User-Friendly Scheduling	HotBackup includes a straightforward scheduling system, allowing you to determine the times and days of the week for recurring HotBackups. These scheduled HotBackups are performed automatically without user intervention or the need to have the Tabs3/PracticeMaster Software open.
E-mail Notification	An unlimited number of customized e-mail messages can be configured to be sent in the event a HotBackup fails or succeeds. These messages can be sent to as many user-defined e-mail recipients as you want.

Note: The HotBackup program is used to make a temporary backup of the data files for all software products installed in the current working directory. This includes System Configuration, Tabs3, PracticeMaster, GLS, APS, and TAS. All GLS clients are included in the HotBackup.

HotBackup vs. Third-Party Backup

Caution: HotBackup creates temporary data backups and it is not intended to replace your regular backup procedures. It is important to make sure that regular backups are kept off site in case of hardware failure, theft, flood, etc.

Discussion and recommendations for backup strategy can be found beginning on page 17.

Configuring HotBackup

Configuration of HotBackup is done in the System Configuration software program. These configuration settings are located in the Platinum Server Configuration window (**Platinum | Platinum Configuration**). After installing the Platinum Server software, you will need to review the settings on the **HotBackup Folder** tab of this window. You may choose to keep these settings, or you may modify them to better suit your needs.

Note: Detailed information regarding individual settings is available in the Help provided with the System Configuration software.

Platinum Server Configuration

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 Tabs3/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.

HotBackup Schedule

The **HotBackup Schedule** tab (Figure 12) 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.

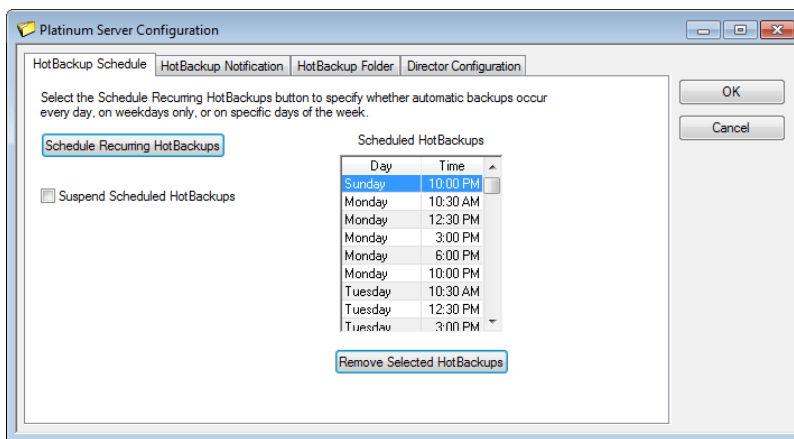


Figure 12, HotBackup Schedule

Schedule Recurring HotBackups

The Schedule Recurring HotBackups window (Figure 13) is used to schedule one or more HotBackups. It is accessed via the **Schedule Recurring HotBackups** button on the **HotBackup Schedule** tab (Figure 12).

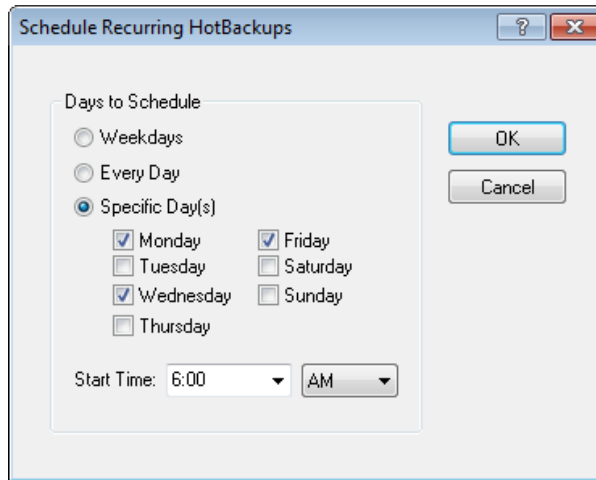


Figure 13, Schedule Recurring HotBackups

HotBackup Notification

The **HotBackup Notification** tab (Figure 14) is used to configure e-mail 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 e-mail messages to notify recipients of successes and failures provides a powerful built-in safeguard feature. We recommend that at least one e-mail message be defined for failures so that the appropriate personnel are notified in the event there are problems.

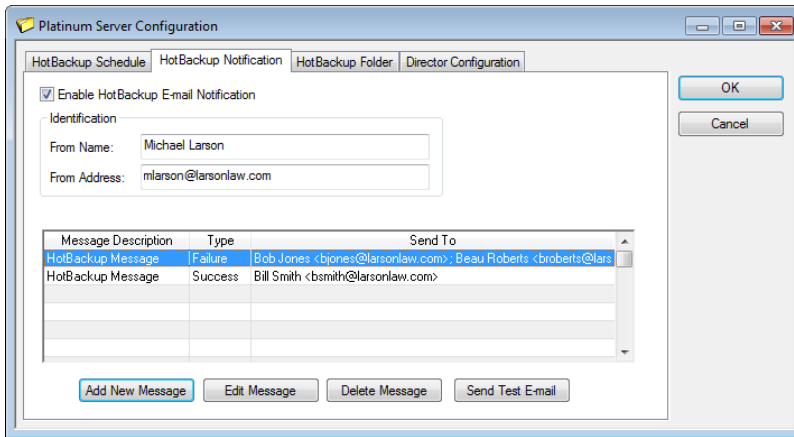


Figure 14, HotBackup Notification

Outgoing E-mail Configuration

The Outgoing E-mail Configuration window (**Settings | Outgoing E-mail Configuration**) (Figure 15) is used to configure the settings necessary to send e-mail messages. It is accessible from the System Configuration software program.

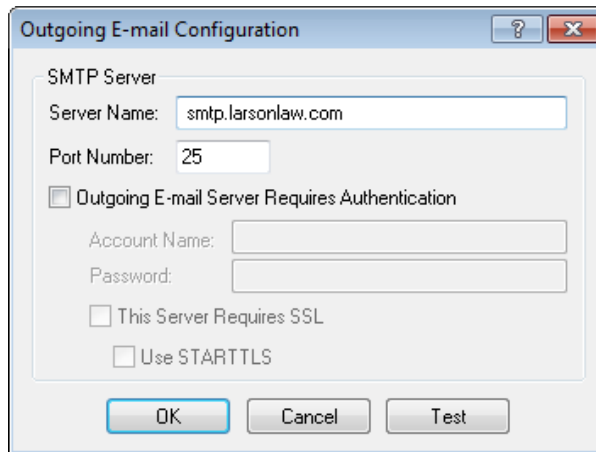


Figure 15, Outgoing E-mail Configuration

Notification Message

The Notification Message window (Figure 16) is used to add a new e-mail message, or edit an existing one. It is accessed via the **Add New Message** and **Edit Message** buttons on the **HotBackup Notification** tab (Figure 14).

Figure 16, Notification Message

HotBackup Folder

The **HotBackup Folder** tab (Figure 17) 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.

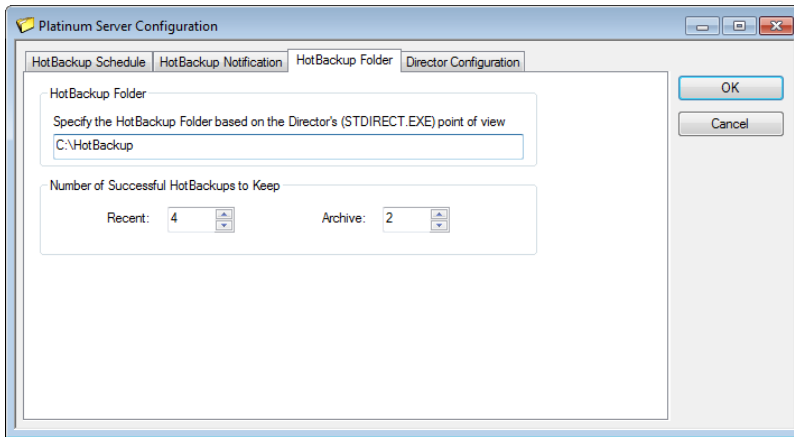


Figure 17, HotBackup Folder

Director Configuration

The **Director Configuration** tab (Figure 18) is used to configure various options for STI Director and the Tabs3/PracticeMaster Accelerators. The default settings are determined when the Platinum Server software is first installed.

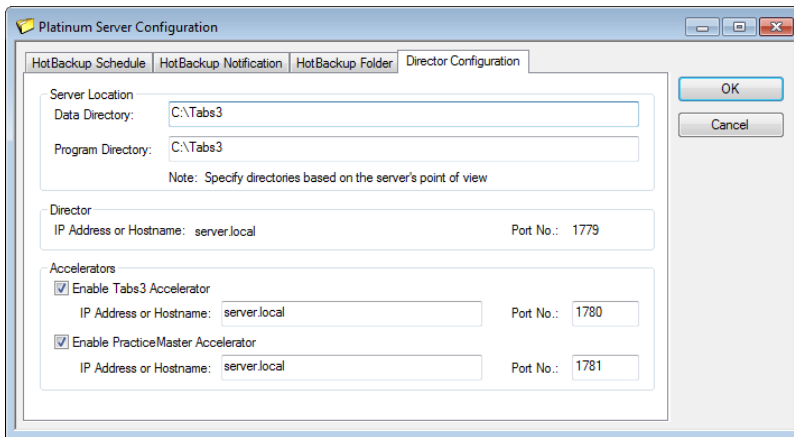


Figure 18, Director Configuration

Directory Structure

The HotBackup folder defined on the HotBackup Folder tab (page 36) of the Platinum Server Configuration window is the parent directory where HotBackups are stored. Within this directory are the following three folders:

Archive Folder

This folder contains older HotBackups that were previously in the Recent folder, and acts as a convenient means of archiving HotBackups. As new HotBackups are added to the Recent folder, older HotBackups are moved to the Archive folder. The number of HotBackups maintained within this folder is determined by the Archive field on the HotBackup Folder tab (page 36). When that limit is exceeded, the oldest HotBackup in this folder is deleted.

Failed Folder

HotBackups originate from this folder. Upon successful completion, the HotBackup is moved to the Recent folder. If a HotBackup does not complete successfully, it remains in this folder. A failed HotBackup is deleted automatically when a newer successful HotBackup is deleted either automatically or via the HotBackup Vault program (page 46).

Recent Folder

This folder contains the most current HotBackups. The number of HotBackups maintained within this folder is determined by the **Recent** field on the **HotBackup Folder** tab (page 44). When that limit is exceeded, the oldest HotBackup in this folder is moved to the Archive folder.

Which folder a HotBackup is stored in (i.e., Archive, Failed, or Recent) depends on the successfulness of a HotBackup, and the settings for the **Recent** and **Archive** fields as defined on the **HotBackup Folder** tab of the Platinum Server Configuration window (page 44). The main benefit for storing HotBackups in this manner is it makes it very convenient to maintain regular external backups.

For example, suppose you want to maintain 10 HotBackups at any one time, but you want your nightly process to only back up the 3 most recent HotBackups. In this case, you would set the **Recent** field to "3", the **Archive** field to "7", and configure your nightly process to back up just the contents of the Recent folder. Doing this allows you to maintain 10 total HotBackups (i.e., 3 in the Recent folder, plus 7 in the Archive folder), while the 3 most recent HotBackups will always be in the Recent folder.

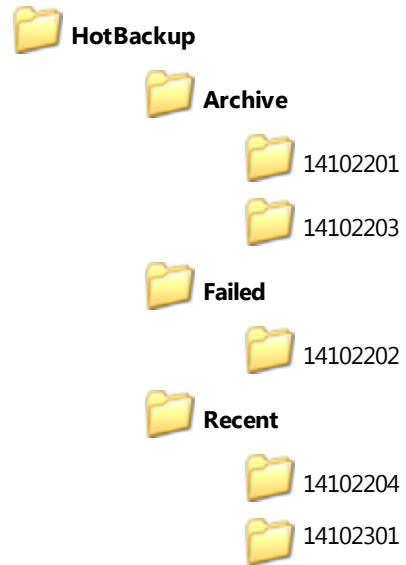


Figure 19, HotBackup directory structure configured to use "2" for **Recent** and "2" for **Archive**

Naming Convention

Within each folder, HotBackups are stored using the following date-based naming convention: YYMMDD##, where “##” is a number from “01” to “99”. This numbering system is used for multiple HotBackups that are created on the same day. For example, the first HotBackup created on October 22, 2014 will be named “14102201”; and the second HotBackup made on that same day will be named “14102202”.

October 22, 2014



10/22/14

10 14 22 01
 Month Year Day Num

HotBackup Vault

The HotBackup Vault program lists all HotBackups located in the HotBackup folder. This includes both successful and unsuccessful (i.e., failed) HotBackups. It is accessed from the System Configuration software program, via the Platinum menu option (**Platinum | HotBackup Vault**).

Figure 20, HotBackup Naming Convention

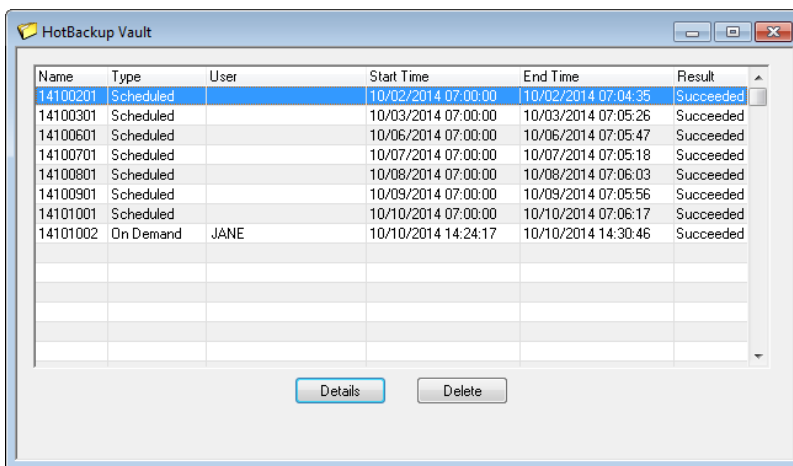


Figure 21, HotBackup Vault

Restore HotBackup

The Restore HotBackup program lets you restore a HotBackup to the original folder on the server or to an alternate folder. Restoring a HotBackup is performed by manually running the HBRESTORE.EXE file located within the HotBackup directory you want to restore.

Running the HBRESTORE.EXE file will launch the Restore HotBackup Wizard, which will walk you through the Restore HotBackup process.

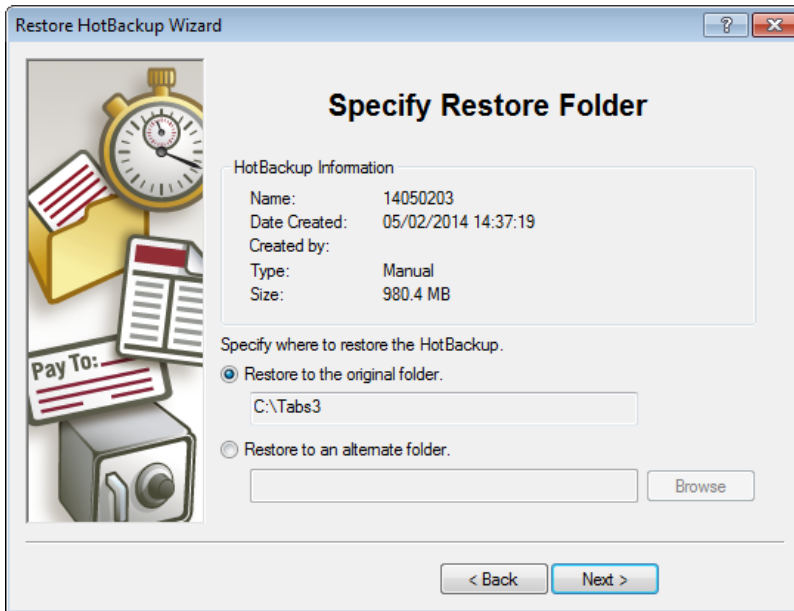


Figure 22, Restore HotBackup Wizard

When restoring to the original folder, you must restore from the server. Additionally, all users must exit all Tabs3 and PracticeMaster programs and the Platinum Server must be shut down.

► To restore a HotBackup

1. Open Windows Explorer.
2. Navigate to the folder with the HotBackup you want to restore.
3. Double-click the HBRESTORE.EXE file.

For example, if you want to restore the first HotBackup made on October 22, 2014 and your HotBackup folder is set as C:\HOTBACKUP on the server computer, then you must first locate the 14102201 HotBackup located in either the Archive or the Recent folder. Assuming it is in the Archive folder, you would double-click the HBRESTORE.EXE file located in the following folder to begin the HotBackup Restore process:

C:\HOTBACKUP\ARCHIVE\14102201\BACKUP

Note: The HotBackup folder is defined on the **HotBackup Folder** tab of the Platinum Server Configuration window in System Configuration (*page 44*).

For additional information on restoring a HotBackup, refer to Knowledge Base Article [R11199](#) - "Restoring a HotBackup" at www.support.Tabs3.com.

Restoring to an Alternate Folder

When restoring to an alternate folder, you can restore from the server or any other computer. The alternate folder specified must be an empty folder or a new folder. Restoring a HotBackup to an alternate folder is for testing purposes only. After restoring to an alternate folder, you will need to temporarily install the Tabs3 and PracticeMaster software to the alternate location in order to test your data. This temporary installation will be run as a standard multi-user version and not a Platinum version of the software.

When specifying the alternate folder, it **must** use the form of [driveletter]:\[foldername]. The folder name cannot include spaces.

Troubleshooting

HotBackup troubleshooting and technical information can be found in our Knowledge Base in Article [R11193](#) - "HotBackup Overview" at:

www.support.Tabs3.com

Configuring Platinum Server

Two Platinum Server configuration files are installed in the program directory during the installation process:

- STSRVR.CFG
- CTSRVR.CFG

These files maintain various settings that affect the performance and function of Platinum Server. Typically, these files are not edited, but they can be used to customize your installation. They can be viewed and edited with a text editor such as Notepad.

Note: Some settings are preceded by a semi-colon, indicating that they are "commented" out (i.e., turned off). These settings are ignored by Platinum Server and are not implemented. To use these particular settings, simply remove the semi-colon. Likewise, if you want to disable a setting, simply add a semi-colon to the front of it.

STI Director

When Platinum Server is installed, an additional Windows service known as the STI Director Service is also installed. Generally speaking, STI Director assists with communicating specific information

between Platinum Server and the various workstations. This service must be running in order for the Platinum Server to function properly.

Although the default settings installed for STI Director are adequate for most installations, it is recommended that you review these settings to ensure no additional customization is necessary.

Configuring and controlling the STI Director Service is done via the Windows Control Panel. From the Control Panel, select **STI Director Service**, which will open the STI Director Service Configuration window (Figure 23).

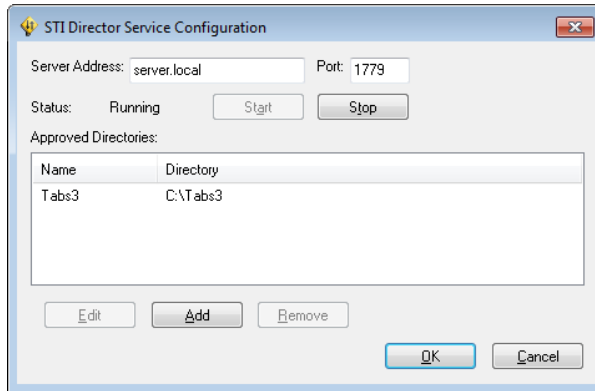


Figure 23, STI Director Service Configuration window

The following options are displayed in the STI Director Service Configuration window:

Server Address The computer name or IP address of the server computer.

Port The port number through which STI Director is accessed (page 13). The default is 1779.

Note: The **Server Address** and **Port** must be exactly the same as the values defined respectively before and after the colon in the second line of the STSRVR.CFG file. For example, if the second line is F_SERVER:1779, then the **Server Address** must be F_SERVER and the **Port** must be 1779.

Status The current operational status of the STI Director Service, indicated as either Starting, Running, or Stopped.

Start/Stop The **Start** and **Stop** buttons can be used to start and stop the STI Director Service.

Warning: Stopping the STI Director Service can result in fatal errors and failed HotBackups. Do not stop the STI Director Service unless absolutely necessary.

Approved Directories

The list of directories that STI Director has access to. This list must contain the location of your Tabs3 and PracticeMaster data files. Directories must be specified based on the server's point of view. Do not use mapped drives, network drive designations, or UNC paths. Although allowed, STI Director cannot recognize these designations and will cause unexpected results.

When the Platinum Server software is first installed, the following approved directory is defined:

Data *your installation directory* (i.e., C:\TABS3)

Note: In the System Configuration program, the value for the **Data Directory** field on the **Director Configuration** tab of the Platinum Server Configuration window (**Platinum | Platinum Server Configuration**) must be listed here as an approved directory. See page 44 for additional information.

Edit/Add/Remove

The **Edit**, **Add**, and **Remove** buttons can be used to modify the list of approved directories.

OK/Cancel

The **OK** and **Cancel** buttons can be used to save or discard your changes.

Note: The **OK** and **Cancel** buttons have no effect on the operational status of the service. For example, if you stop the STI Director Service and then select **Cancel**, the service will remain stopped.

Before making any changes to the STI Director Service, verify that all users have exited the Tabs3 and PracticeMaster software, and that a HotBackup is not in progress. Although you do not have to stop the STI Director Service prior to changing its settings, you do need to restart the service in order for changes to take affect. You will be prompted to restart the service if any changes are detected.

Displaying the Status of the STI Director Service

The STI Director Service is automatically started when the software is installed and typically does not need to be stopped. For troubleshooting purposes, it may be necessary to verify whether the STI

Director Service is running. The current status of the STI Director Service can be determined using one of the following methods.

► **To display the current status of STI Director Service from the Services Applet**

1. From the **Control Panel**, double-click **Administrative Tools** and then double-click **Services**.
2. Highlight the **STI Director Service**. The **Status** column will show "Started" if the server is running. Otherwise, it will be blank if the server is not running.

Note: You may need to refresh the Computer Management window (**Action | Refresh**) to update the status of the STI Server Service.

► **To display the current status of STI Director from a Command Prompt window**

1. From the Platinum Server computer, open a command-line window (**Start | Program | Accessories | Command Prompt**).
2. Type the following command:

```
sc query "<STI Director Service>"
```

Note: The <STI Director Service> represents the name of the service.

4. A message similar to the following will be displayed.

```
SERVICE_NAME: STI Director Service
TYPE           : 10  WIN32_OWN_PROCESS
STATE          : 4   RUNNING
                (STOPPABLE, NOT_PAUSABLE, ACCEPTS_SHUTDOWN)
WIN32_EXIT_CODE : 0   (0x0)
SERVICE_EXIT_CODE : 0   (0x0)
CHECKPOINT     : 0x0
WAIT_HINT      : 0x0
```

Stopping and Starting the STI Director

Under normal day to day operation, it typically is not necessary to stop or start the STI Director. It is not necessary to stop the STI Director to make a third-party backup. If you shut down the Platinum Server, it is not necessary to stop the STI Director.

It may become necessary to stop or start the STI Director Service due to configuration changes or for troubleshooting purposes. If you do need to stop or start the STI Director Service, you can do so using the same procedures used to stop and start the STI Server Service, as documented on page 21. Simply replace the service name of "STI Server Service" with "STI Director Service".

Note: Stopping the STI Director Service while users are in the software or a HotBackup is running can result in fatal errors and failed HotBackups.

STSRVR.CFG

The STSRVR.CFG file is an ASCII text file that consists of two lines. The following is an example of what the contents of a Windows STSRVR.CFG file might look like:

```
STI_SERVER@FS1
FS1:1779
```

The information in the STSRVR.CFG file is used by the Tabs3/PracticeMaster software to communicate with Platinum Server and STI Director. This information is automatically written to this file when the Platinum Server software is installed.

On the first line, the portion before the @ character must be "STI_SERVER". The portion following the @ character represents the computer name or IP address of the server computer where Platinum Server is installed.

On the second line, the portion before the colon represents the computer name or IP address of the server computer where Platinum Server is installed. The portion following the colon represents the port number through which STI Director is accessed.

Note: The server name in the STSRVR.CFG file is case sensitive, and must match the server name in the CTSRVR.CFG file exactly.

Note: There may be other instances where the automatic detection of the server name may be incorrect (e.g., if there are two network adapters installed on the server computer or the computer serves in a dual server capacity). If this is the case, it will be necessary to manually edit the STSRVR.CFG file.

CTSRVR.CFG

The CTSRVR.CFG file is an ASCII text file consisting of multiple lines. The following is an example of what the contents of a CTSRVR.CFG file looks like:

```

DAT_MEMORY                125 (1400MB for 64-bit)
IDX_MEMORY                 75 (700MB for 64-bit)
;VSS_WRITER                YES
;DIAGNOSTICS              VSS_WRITER
;DIAGNOSTICS              LOGON_COMM
SERVER_NAME                STI_SERVER
COMM_PROTOCOL              F_TCPIP
COMM_PROTOCOL              FSHAREMM
SQL_DATABASE (SQL-only)   TABS3
SQL_OPTION (SQL-only)     LOAD_CALLBACK_LIB
SQL_OPTION (SQL-only)     PARTIAL_SEG
SQL_OPTION (SQL-only)     DB_CASE_INSENSITIVE
SETENV (SQL-only)         TPE_MM_SWAPSIZE=2097151
SETENV (SQL-only)         TPE_MM_SWAPSIZE=4192
CPU_AFFINITY               0,1,2,3
PAGE_SIZE                  8192
FILES                      2000
COMPATIBILITY              TCPIP_CHECK_DEAD_CLIENTS
ITIM_RETRY_DEFER           50
ITIM_RETRY_LIMIT           100
IO_ERROR_BLOCK_SIZE        65536
IO_ERROR_BLOCK_RETRY        600
IO_ERROR_BLOCK_SLEEP        100
COMPATIBILITY              REVERT_TO_V6HDR
COMPATIBILITY              NO_COMMIT_READ_LOCK
COMPATIBILITY              OPEN_SHARE_RW
;DYNAMIC_DUMP_DEFER        10
SYSLOG                     DYNAMIC_DUMP
SYSLOG                     DYNAMIC_DUMP_FILES
SYSLOG                     LOGFAIL_PURGE
CTSTATUS_MASK              DYNAMIC_DUMP_FILES
CTSTATUS_SIZE              5242800
CTSTATUS_MASK              WARNING_FCRP_ERR
CTSTATUS_MASK              VDP_ERROR
LOG_SPACE                  100
CONNECTIONS                1024
;SKIP_MISSING_FILES        YES

```

Figure 24, CTSRVR.CFG File

The majority of these settings do not need to be modified, and will be sufficient for most firms. However, the following section describes those settings that can be modified for your installation. Comments regarding the various settings are provided in the default CTSRVR.CFG file, although they are not shown here. Additionally, detailed information about all settings in the CTSRVR.CFG file can be found in our Knowledge Base in Article [R11369](#) - "CTSRVR.CFG Configuration File" at www.support.Tabs3.com.

Note: Changes made to CTSRVR.CFG do not take affect until the next time Platinum Server is started.

COMPATIBILITY

The LARGE_CACHE setting allows memory settings to be specified in megabytes as opposed to bytes. Therefore, when enabled, specifying 80 for DAT_MEMORY would indicate 80 megabytes of RAM. When not enabled, you would need to specify 80000000 to indicate 80 megabytes of RAM.

DAT_MEMORY

The memory allocated to the data cache. This number is stated in megabytes when COMPATIBILITY LARGE_CACHE is enabled, otherwise it is stated in bytes.

Note: See the “Configuring Memory Allocation” section for details on changing this value (*page 55*).

IDX_MEMORY

The memory allocated to the index cache. This number is stated in megabytes when COMPATIBILITY LARGE_CACHE is enabled, otherwise it is stated in bytes.

Note: See the “Configuring Memory Allocation” section for details on changing this value (*page 55*).

VSS_WRITER

This setting determines whether support for the Volume Shadow Copy Service (VSS) is enabled for third-party backup programs.

Note: See the “Configuring Volume Shadow Copy Service (VSS) Writer” section for more information about this feature (*page 60*).

DIAGNOSTICS

The DIAGNOSTICS LOGON_COMM setting allows additional diagnostic information to be shown in the Message Monitor window of the Desktop Interactive Program. Do not remove the DIAGNOSTICS DYNDUMP_LOG setting.

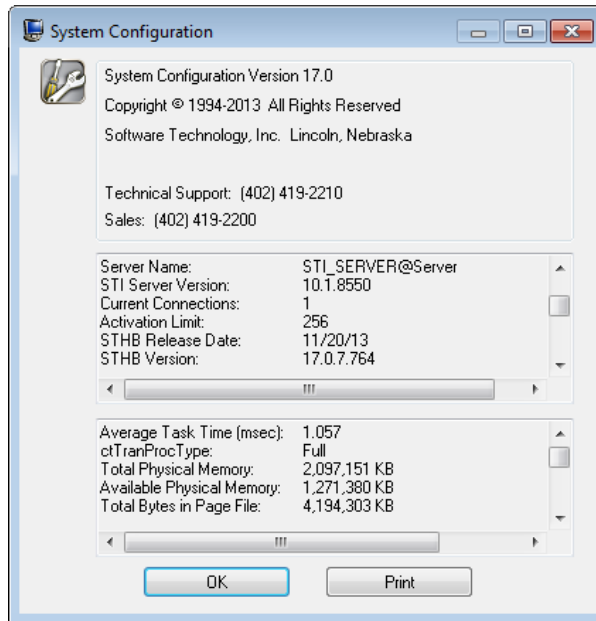


Figure 25, Help | About window

SERVER_NAME

The SERVER_NAME is STI_SERVER. This name must match the server name in the STSRVR.CFG file (page 52).

Configuring Memory Allocation

The default settings in the CTSRVR.CFG file for DAT_MEMORY and IDX_MEMORY are 125MB and 75MB respectively. This configuration is designed for a Platinum server computer with 1GB of RAM, with the assumption that the data files are somewhat larger than the index files. Most Platinum firms will want to assign additional memory to ensure optimal performance.

As a general rule of thumb, it is a good idea to configure Platinum Server to reserve approximately 20% of the server's total physical memory for caching of data and index files. For example, if Platinum Server is running on a server with 2GB (i.e., 2048MB) of physical memory, you would want to configure Platinum Server to reserve 400MB memory (i.e., 20% of 2048 is roughly 400). Dividing this amount between the DAT_MEMORY and IDX_MEMORY settings results in 200MB for each (i.e., $400 / 2 = 200$). However, data files are typically somewhat larger than index files, so we recommend allocating 65% to the data cache and 35% to the index cache. In this case, you would set DAT_MEMORY to 260MB and IDX_MEMORY to 140MB.

Note: Changes made to CTSRVR.CFG do not take effect until the next time Platinum Server is started.

Note that this 20% figure is merely a suggested starting point from which to begin configuring memory allocation. Every server is different, with different hardware configurations, available resources, and applications running on them. You may need to further adjust these settings up or down to find a balance that works for your firm. For example, allocating a combined 1GB on a 2GB RAM server is reasonable if no other RAM demanding applications are used.

Important Note: This method of calculating cache sizes is based on a typical firm's data set. See the "Calculating Your Ideal Cache Sizes" section on page 56 for a more detailed method of determining the ideal cache sizes for your firm's specific needs.

How Caching Works

When Platinum Server is started, it reserves a set amount of memory on the server specifically for data and index files. This memory is allocated to Platinum Server, thereby preventing it from being used by other applications running on the same server. The amount of memory reserved by Platinum Server is determined by the combined amounts of the DAT_MEMORY and IDX_MEMORY settings in the CTSRVR.CFG file.

The goal when configuring the cache size is to keep the most commonly accessed data and index files stored in memory. When a file is accessed by the Tabs3 and PracticeMaster software, it is read from the server's hard drive into memory. Once the file is read into memory, the software can access it significantly faster than it can from the hard drive. As long as the file is in use, and cache memory is not full, it will remain in cache. For example, if multiple users are entering fees in Tabs3, T3FEE.DAT is cached to improve performance. Once the last user stops accessing T3FEE.DAT, it is no longer cached.

Generally speaking, allocating more memory to Platinum Server will increase its performance. However, allocating too much memory to Platinum Server can negatively affect the overall server performance due to increased page file activity. Additionally, allocating more memory than necessary reduces the amount of memory available for other programs on your server such as Exchange or MS SQL servers. How much memory is needed and how much is available to allocate will vary depending on your Tabs3 and PracticeMaster data as well as your server's available memory and operating system. Ideally, you should have enough memory allocated so that your most commonly used .DAT and .IDX files can remain cached throughout the day. From a practical standpoint, your server may not have enough memory to meet this goal.

The processes that benefit the most from caching are accelerated Tabs3 and PracticeMaster reports and filtering records in PracticeMaster.

Calculating Your Ideal Cache Sizes

To determine your ideal cache sizes, review the .DAT and .IDX file sizes in your Tabs3 and PracticeMaster Current Working Directory, as well as those present in the CMSYSTEM folder. Note

any .DAT files that are significantly larger than the others and add up their total size. (*Note: Do not include files that begin with CMARC or T3ARCH in this total.*) This is your ideal DAT_MEMORY size. Repeat the same process with the .IDX files to determine the ideal IDX_MEMORY size. Before assigning these values to the CTSRVR.CFG, read the information below.

Standard Platinum Server

32-bit versions of Windows-based operating systems are restricted to a maximum of 4GB of physical memory (RAM). Additionally, a 32-bit operating system will only allocate up to 2GB of memory to the 32-bit Platinum Server, while a 64-bit operating system will only allocate up to 4GB of memory to the 32-bit Platinum Server. If you have 2GB or more of memory, you will almost certainly want to increase the default settings. However, keep in mind that if the server has additional 32-bit services, you will need to leave some of that 2GB for those functions. On a 32-bit operating system, do not allocate more than 1.5GB of RAM to the combined data and index caches, as some memory is required for other functions within the software. Likewise, on a 64-bit operating system, do not allocate more than 3GB of RAM total to the combined data and index caches. If your ideal data and index cache sizes calculated above are larger than the available memory, you may want to consider upgrading to the 64-bit Platinum SQL version of the software, assuming you already have a 64-bit server with more than 4GB of memory.

Platinum SQL Server (64-bit)

The Platinum SQL Server can access memory beyond the 2GB limit. For firms with large amounts of data, this allows you to allocate additional amounts of memory to caching. It is not unusual for larger firms to need to allocate 25GB or more of RAM to caching. As stated above, you should have enough memory allocated that the most commonly accessed .DAT and .IDX files can all be cached in memory. This significantly improves performance for accelerated reports and filtering in PracticeMaster, particularly with larger data sets.

Note: As with the standard 32-bit Platinum Server, do not allocate more memory than is physically present on the server. Also, you must leave enough memory available for file system caching and any other programs running on the server.

Determining Current Cache Usage

Platinum SQL includes a utility for measuring performance on your Platinum Server called c-treeACE Gauges. Among its features is the ability to track the data and index memory used by the Platinum Server. This allows you to determine if the amount of cache you have assigned is sufficient.

Note: When testing cache usage, have the users run accelerated reports and filter records in PracticeMaster during a normal workday for the firm. If there are reports or filtering processes that have been noticeably slower than others, those should be of particular interest when testing. Knowledge Base Article [R11182](#), "Tabs3 and PracticeMaster Accelerators" contains a list of accelerated reports.

► **To access the c-treeACE Gauges program**

1. Open the Tabs3 and PracticeMaster current working directory on the server.
2. Open the **SQL Extras** folder.
3. Copy the **Unsupported** folder to your local drive. (*Note: It is possible to run this program across the network from the server; however, you will not have access to the included help files.*)
4. Double-click the **Unsupported** folder on your local drive.
5. Double-click **c-treeGauges.exe**.
6. Enter "STI_SERVER" in the **Server Name** field.
7. Enter the Platinum Server computer's network name or IP address in the **Machine Name / IP Address** field.
8. Enter "STADMIN" in the **User Name** and **User Password** fields and click **OK**.
9. Select **View | Advanced**.

The section relating to memory cache usage is titled Data/Index Caches (Fig. 6-3). The **% of Data Cache Used** and **% of Index Cache Used** areas indicate what percentage of the allocated data and index caches are being used. The numbers under each bar on the left indicate average usage, whereas the numbers on the right indicate current usage.

Note: The gauges do not display the actual amount of memory allocated; this information is only available in the CTSRVG.CFG file.

You should aim for an average value of 80-90%, which allows for unusually heavy usage as well as leaving room for growth in the data and index files over time. If your firm notices a drop in performance during heavy usage, this utility can help you determine if more memory should be allocated to caching.

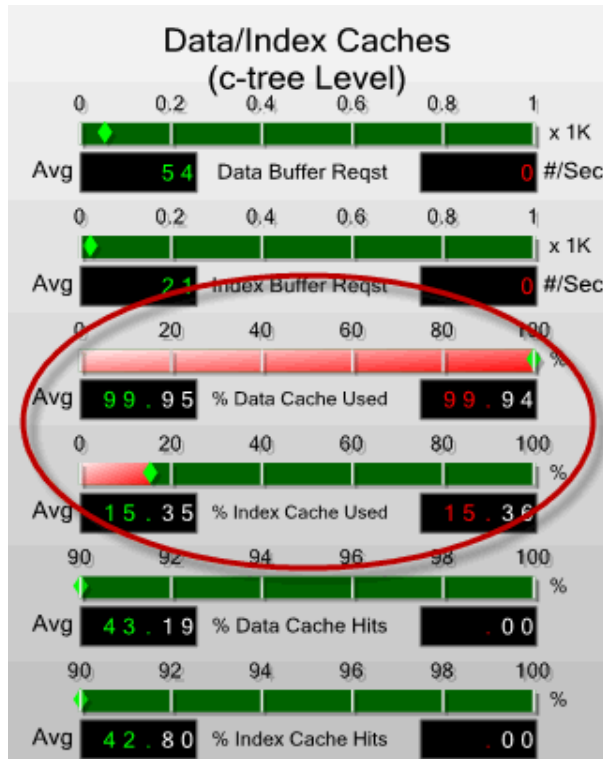


Figure 26, Data/Index Caches

In the example pictured above, nearly 100% of the data cache is in use, while only 15-16% of the index cache is in use. This indicates that additional memory should be allocated to the data cache, while the index cache amount could be lowered by 70-80%. Let's assume that your firm has allocated 4GB of RAM, divided equally between the data and index caches (2GB apiece). You need to lower the index cache by 75%, giving a value of 512MB for the index cache. Unfortunately, there is no way of determining how much additional memory is needed for the data cache based on the information available, so the goal at this point should be to allocate more memory than is needed, in order to determine how much of that memory is actually in use. For example, you could try increasing the amount of memory assigned to the data cache to 3GB and running the test again. If the **% of Data Cache Used** value drops significantly below 100%, you can then adjust the value for the data cache the same way you did for the index cache.

Note: It may be necessary to experiment when allocating more memory. Additionally, because you must restart Platinum Server each time you edit the CTSRVR.CFG file, you may need to perform the test over the course of several days. Once you have the values set where you think they should be, you may want to set up a schedule to periodically check the values during heavy usage periods to ensure optimal memory allocation and performance.

Configuring Volume Shadow Copy Service (VSS) Writer

In order to utilize the Volume Shadow Copy Service (VSS) with the Tabs3 and PracticeMaster software, the VSS_WRITER setting in the CTSRVR.CFG file must be included and set to YES. Once this modification is implemented, the Platinum Server Service must be restarted. When the Platinum Server is started, it will register itself with the Volume Shadow Copy Service for Windows. Then, when a snapshot is started, VSS will notify the Platinum VSS writer to freeze all transactions, allowing a clean snapshot of the data and program files. VSS will then release these transactions, allowing Platinum to continue to operate as usual.

Normally, the VSS service does not write to the log files. However, in some situations it is helpful to record information about each snapshot. In this case, additional messages can be logged to the CTSTATUS.FCS file by adding a DIAGNOSTICS setting with the value VSS_WRITER to CTSRVR.CFG.

Additional information about these settings and how to use VSS alongside the Tabs3 and PracticeMaster Platinum software can be found in KB Article [R11430](#), "Using Volume Shadow Copy Service (VSS) to Back Up Tabs3 and PracticeMaster Software" at www.support.tabs3.com.

Performance Optimization

Like most software, the performance of Platinum Server is largely affected by the hardware and network on which it is running. The following information provides general guidelines for improving the overall performance of the Platinum Server software.

Network Throughput

Network performance is important. Gigabit Ethernet connections at 1,000 megabits per second (Mbps) and Fast Ethernet connections at 100 Mbps will be faster than older 10 Mbps Ethernet connections.

I/O Caching

If the computer running Platinum Server has sufficient memory, increasing the DAT_MEMORY and IDX_MEMORY values will generally increase performance. In general, the larger the data and index cache sizes, the better the performance for heavy use situations. Additional details can be found in the previous "Configuring Memory Allocation" section (*page 55*).

Fastest Server

The performance of Platinum Server is almost entirely dependent on the host hardware. The faster the CPU and disk I/O subsystem and the more memory available, the faster Platinum Server performs. In the event that you have more than one computer that could act as the server, you can use the following information to determine which computer should host the Platinum Server software.

Fastest CPU

CPU speed is the dominant factor in determining performance. The faster the CPU, the better. Multi-threading capabilities allow Platinum Server to take advantage of multiple CPUs on the server. Multi-core processors are highly recommended. Accelerator technology will take full advantage of the greatest CPU power provided.

Fastest Disk I/O Subsystem

Disk speed is an important factor in determining performance. HotBackup in particular is very disk intensive. The use of a RAID disk system can increase performance. You may want your server equipped with a 15000 RPM or 10000 RPM hard drive.

Fastest and most Memory

Computer memory (i.e., RAM) is important. Although Platinum Server software will run on a server with as little as 512 MB of memory, we recommend a minimum of 2GB. Accelerator technology will also make use of additional memory. The more users and the larger your data set, the more memory you should have. Additionally, if other server software is also being used (e.g., Microsoft Exchange, GroupWise, document management software, etc.), you should allow for more memory. Be sure to evaluate the memory settings in the CTSRVR.CFG file to reflect available memory. Having 2GB or more of memory available improves performance when HotBackups are made while other users are using the software.

PracticeMaster 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 our Knowledge Base in Article [R11427](#) - “Configuring the PracticeMaster Platinum Exchange Connector” at www.support.Tabs3.com.

ODBC Driver

When using an ODBC driver with Platinum Server and the Tabs3 and PracticeMaster Platinum software, there are several settings that must be altered in the ODBC Configuration. Complete details regarding these settings can be found in our Knowledge Base in Article [R10017](#) - “Working with ODBC” at www.support.Tabs3.com.

Note: This does not apply to Platinum SQL systems. More information on configuring ODBC configuration for the Platinum SQL Server can be found in *Operating Platinum SQL* section of this guide (*page 29*).

Tabs3 and PracticeMaster File Paths

When using the Tabs3 Create Validation Files program with the Platinum Server, paths are now relative to the server whereas before they were relative to the client. Complete details regarding how the change affects the above three programs can be found in the “How Platinum Server Treats Paths” section of the Platinum Server manual (*page 14*).

Uninstalling Platinum Server

This chapter discusses how to uninstall Platinum Server, and how to revert from the Platinum version of Tabs3 and PracticeMaster software to the standard multi-user software.

Uninstalling Platinum Server

Use the following procedure to uninstall the Platinum Server software. If you will be reverting to the standard multi-user software, follow the additional steps listed in the “Reverting to Standard Software” section.

Note: Uninstalling Tabs3 and PracticeMaster software, including Platinum Server, does not delete any data files.

► To uninstall the Platinum Server software

1. From the Control Panel, select **Add/Remove Programs**.
2. Select **Tabs3/PracticeMaster Programs**.
3. Follow the on-screen instructions until a window is displayed similar to the one shown in Figure 27.

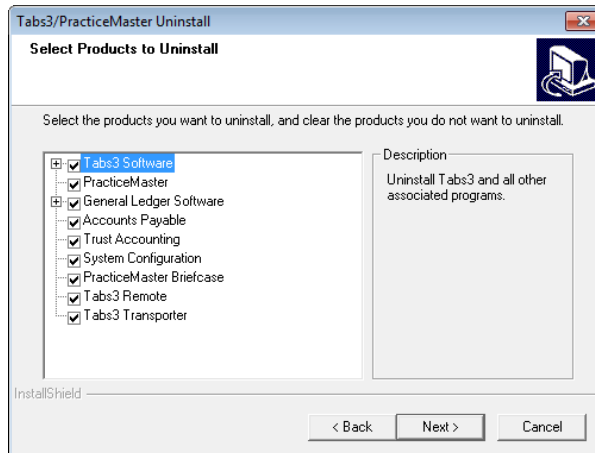


Figure 27, Uninstall window

4. Select all of the options.
5. Click **Next** and follow the remainder of the on-screen instructions.

Additional information regarding uninstalling the Platinum version of the Tabs3 and PracticeMaster software can be found in our Knowledge Base in Article [R11376](#) - “Uninstalling Tabs3 Software” at www.support.Tabs3.com.

Reverting to Standard Software

If you need to revert from the Platinum version of Tabs3 and PracticeMaster software to the standard multi-user software, please contact our Technical Support Department at: (402) 419-2210.

Moving the Software to Another Server

In certain situations, you may decide to move all Tabs3 and PracticeMaster software, including Platinum Server, from one server to another. This usually occurs if you purchase a new server computer or want to utilize a better-performing server.

Complete details regarding this procedure can be found in our Knowledge Base in Article [R11375](#) - "Moving Platinum Software from One Computer to Another" at:

www.support.Tabs3.com

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