Tabs3
Reliable Software. Trusted Service.

Billing   PracticeMaster.   Financial

Platinum Server Guide

Platinum Server Guide

Copyright © 2013-2018

Tabs3, PracticeMaster, and the "pinwheel" symbol (🌀) are registered trademarks of Software Technology, LLC.

Version 18 (Tuesday, January 2, 2018)

Table of Contents

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 7)*. The following diagram compares the differences between the standard multi-user method and the Platinum Method:
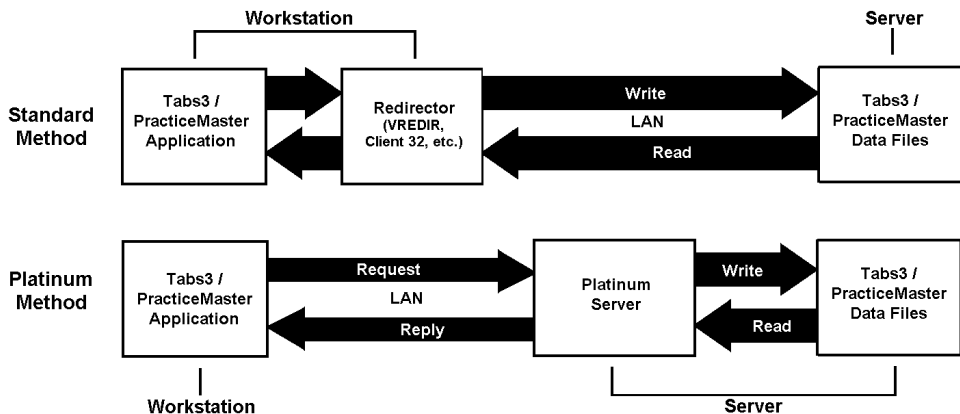
Figure 1, "Standard Method" of Networking vs. "Platinum Method" of Networking

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.

Key Features

The following features are included in the Platinum software.

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.
- Matter 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. HotBackup utilizes Transaction Processing to allow data file backups to be performed without anyone exiting the software, thus allowing daily work to continue. The following features of HotBackup were implemented to increase the convenience and efficiency of the Tabs3 and PracticeMaster software:

- **Background Processing** provides 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** allows you 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** allows 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** allows 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.

Complete information on HotBackup can be found in the HotBackup section starting on page 35.

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 **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 **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.

Increased Index Limit

Up to 30 user-defined permanent indexes can be created. Each file can have a maximum total of 63 indexes which includes protected indexes, user-defined indexes, and temporary indexes. In non-Platinum systems, up to 15 user-defined permanent indexes can be created, with a maximum total of 31 indexes. Indexes can be used to sort columns on the **List** tab of any file, set the default Sort and Smart tabs in QuickViews, and can be used to improve report performance.

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 secure workflow between users, retains records for accountability purposes, and enhances 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 **R11596** - 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. Furthermore, migrating the Platinum Server to a new computer is very easy to do.

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 64)*.

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, Microsoft, Adobe, 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 2016/2012/2008 Server or Windows 10/8/7. Specific requirements are listed on page 11.
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	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.
Data Encryption	Platinum SQL allows you to encrypt the Tabs3 and PracticeMaster data, providing your data with an extra layer of security. Once data files are encrypted, they can only be read by the Tabs3 and PracticeMaster Platinum SQL 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.
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 12.

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 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 overhead 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 or 95000 for Platinum SQL Server).

- A multi-core processor is recommended.

- 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 2016, Microsoft Windows Server 2012 R2. Microsoft Windows Server 2012, Microsoft Windows Server 2008 (either 32-bit or 64-bit version), Windows Server 2008 R2, Windows Small Business Server 2011 (either 64-bit or 32-bit version), Windows 10, 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 10/8/7. 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 10/8/7), you are limited to the number of concurrent connections and may exceed the connection limit in that operating system.

- High speed wired network recommended. 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 2016, 2012, or 2008). Using a non-server operating system such as Windows 10, 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 .

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 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 software is provided via download or CD and contains all of the Tabs3 and PracticeMaster the programs and Platinum Server, which makes installing Platinum versions of the software simple. The software must be installed from the server.

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 via Internet download**

1. Go to **www.tabs3.com/install**.

2. Download and install the software.

3. Certain installations require an Activation Code. If an Activation Code is required, you can copy and paste it from the email your invoice was attached to.

    Note: Activation Codes are valid for 30 days. Contact Technical Support if you need a new Activation Code.

▶ **To install the Platinum Server software on your hard disk via CD**

1. Insert the CD into your CD drive.

2. The installation 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. Follow the on-screen instructions to install the selected 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.

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 21)*. If you prefer to not install Platinum Server as a Windows service (not recommended), you will need to start Platinum Server manually *(page 26)*.

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 14)* 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 35)* for more information.

You will need to optimize your server's cache settings to ensure that the Platinum software is taking full advantage of available memory. See the **Configuring Memory Allocation** section *(page 54)* 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 47)* 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 15)*.

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 5807** - Platinum Server
- **Port 6597** - Platinum SQL

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 **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.

> **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 *(page 47)*.
CTSRVR.CFG **STSRVR.CFG**	These files represent the server configuration files. Additional details regarding these files can be found on page 50.
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 **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:

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)
- **R11596** - Configuring the PracticeMaster Platinum Exchange Connector
- **R11597** - Troubleshooting the PracticeMaster Platinum Exchange Connector
- **R11660** - Platinum SQL Data Encryption

Help Topics

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

Technical Support

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

<div align="center">

Technical Support
Phone: (402) 419-2210
Hours: 8:00 a.m. to 5:00 p.m. (Central Time)
Monday through Friday

</div>

Operating Platinum Server

This section 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 29)*.

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, the Platinum Server is configured by default to run as a Windows service. The Windows service 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, the Platinum Server is configured as a Windows service by default. The service is configured to start automatically when the server computer is started. In the event the service is removed, it can be reinstalled automatically by reinstalling the Tabs3 and PracticeMaster software or manually using the command line.

> **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, which is significantly faster than the TCP/IP protocol used by applications.

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, the Platinum Server is configured as a Windows service 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 an administrative command-line window.
    a. In Windows Server 2016 , Windows 10, and Windows 8.1, right-click the **Start** button and select **Command Prompt (Admin)**.
    b. In Windows 8, right-click the lower-left corner of the screen and select **Command Prompt (Admin)**.
    c. In Windows Server 2012 or Windows 7 and prior, click the **Start** menu type "cmd" in the **Search programs and files** field. Right-click cmd.exe and select **Run as Administrator**.
2. 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. If the path contains spaces, you will need to place double quotes around the path (e.g., "C:\Financial Software\Tabs3\ctsrvr.exe").

3. 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**

1. From the Platinum Server computer, open an administrative command-line window.
   a. In Windows Server 2016 , Windows 10, and Windows 8.1, right-click the **Start** button and select **Command Prompt (Admin)**.
   b. In Windows 8, right-click the lower-left corner of the screen and select **Command Prompt (Admin)**.
   c. In Windows Server 2012 or Windows 7 and prior, click the **Start** menu type "cmd" in the **Search programs and files** field. Right-click cmd.exe and select **Run as Administrator**.

2. 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
   ```

3. 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.

4. The message "[SC] ChangeServiceConfig SUCCESS" will be displayed.

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

1. Open the **Control Panel**.

   - In Windows Server 2016 , Windows 10, and Windows 8.1, right-click the **Start** button and select **Control Panel**.

   - In Windows 8, right-click the lower-left corner of the screen and select **Control Panel**.

   - In Windows Server 2012 or Windows 7 and prior, click the **Start** menu and select **Control Panel**.
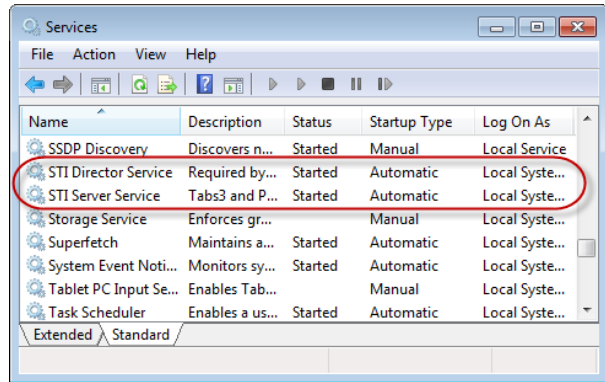

Figure 2, Services Applet

2. From the **Control Panel**, double-click **Administrative Tools** and then double-click **Services**. This will open the Services Applet *(Figure 2)*.

3. Right-click the **STI Server Service** and select **Properties** to open the STI Server Services Properties window *(Figure 3)*.

4. On the **General** tab, change the **Startup type** to "Automatic."

5. Click **OK** to close the Properties window.

6. In the Services Applet window, the **Startup Type** column for the STI Server Service will be shown as "Automatic."
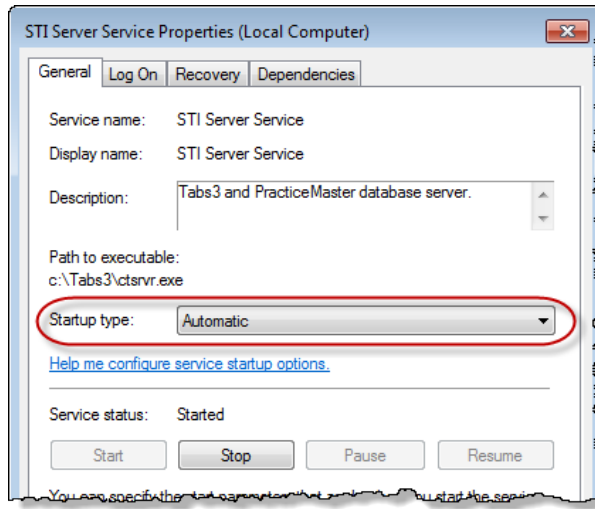
Figure 3, STI Server Service Properties window

Desktop Interactive Program

The Desktop Interactive Program is the Windows GUI (Graphical User Interface) version of Platinum Server. The STI Server Service can be configured to display it whenever it is started.

▶ **To configure the STI Server Service to display the Desktop Interactive Program**

1. Open **the Control Panel**.
   - In Windows Server 2016 , Windows 10, and Windows 8.1, right-click the **Start** button and select **Control Panel**.
   - In Windows 8, right-click the lower-left corner of the screen and select **Control Panel**.
   - In Windows Server 2012 or Windows 7 and prior, click the **Start** menu and select **Control Panel**.

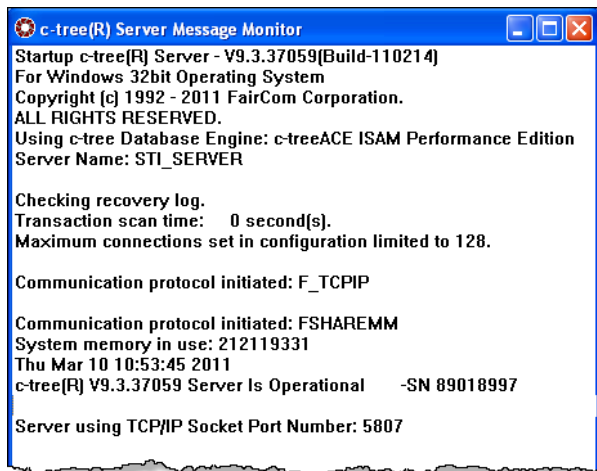2. From the **Control Panel**, double-click **Administrative Tools** and

Figure 4, Message Monitor window

then double-click **Services**. This will open the Services Applet *(Figure 2)*.

3. Right-click the **STI Server Service** and select **Properties**.

4. On the **Log On** tab, select the **Allow service to interact with desktop** option.

5. Click **OK** to close the Properties window.

By default, the Desktop Interactive Program displays the Message Monitor window *(Figure 4)*, which provides Platinum Server connection information. The Desktop Interactive Program can also be used to stop the Platinum Server *(page 27)*.

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. Open the **Control Panel**.
    a. In Windows Server 2016 , Windows 10, and Windows 8.1, right-click the **Start** button and select **Control Panel**.

    b. In Windows 8, right-click the lower-left corner of the screen and select **Control Panel**.

    c. In Windows Server 2012 or Windows 7 and prior, click the **Start** menu and select **Control Panel**.

2. From the **Control Panel**, double-click **Administrative Tools** and then double-click **Services**. This will open the Services Applet *(Figure 2)*.

3. Right-click the **STI Server Service** and select **Properties** to open the STI Server Service Properties window *(Figure 3)*.

4. Click the Start button.

5. Click **OK** to close the Properties window.

6. Close the Services window.

▶ **To start Platinum Server from a Command Prompt window**

1. From the Platinum Server computer, open an administrative command-line window.

    a. In Windows Server 2016 , Windows 10, and Windows 8.1, right-click the **Start** button and select **Command Prompt (Admin)**.

    b. In Windows 8, right-click the lower-left corner of the screen and select **Command Prompt (Admin)**.

    c. In Windows Server 2012 or Windows 7 and prior, click the **Start** menu type "cmd" in the **Search programs and files** field. Right-click cmd.exe and select **Run as Administrator**.

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. Open the **Control Panel**.
   - In Windows Server 2016 , Windows 10, and Windows 8.1, right-click the **Start** button and select **Control Panel**.
   - In Windows 8, right-click the lower-left corner of the screen and select **Control Panel**.
   - In Windows Server 2012 or Windows 7 and prior, click the **Start** menu and select **Control Panel**.
2. From the **Control Panel**, double-click **Administrative Tools** and then double-click **Services**. This will open the Services Applet *(Figure 2)*.
3. In the Services Applet window, the **Startup Type** column for the STI Server Service will be shown as "Automatic."
4. From the **Control Panel**, double-click **Administrative Tools** and then double-click **Services**.
5. 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 an administrative command-line window.
   a. In Windows Server 2016 , Windows 10, and Windows 8.1, right-click the **Start** button and select **Command Prompt (Admin)**.
   b. In Windows 8, right-click the lower-left corner of the screen and select **Command Prompt (Admin)**.
   c. In Windows Server 2012 or Windows 7 and prior, click the **Start** menu type "cmd" in the **Search programs and files** field. Right-click cmd.exe and select **Run as Administrator**.
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. Open the **Control Panel**.
   - In Windows Server 2016 , Windows 10, and Windows 8.1, right-click the **Start** button and select **Control Panel**.
   - In Windows 8, right-click the lower-left corner of the screen and select **Control Panel**.
   - In Windows Server 2012 or Windows 7 and prior, click the **Start** menu and select **Control Panel**.

2. From the **Control Panel**, double-click **Administrative Tools** and then double-click **Services**.

3. 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 an administrative command-line window.

    a. In Windows Server 2016 , Windows 10, and Windows 8.1, right-click the **Start** button and select **Command Prompt (Admin)**.

    b. In Windows 8, right-click the lower-left corner of the screen and select **Command Prompt (Admin)**.

    c. In Windows Server 2012 or Windows 7 and prior, click the **Start** menu type "cmd" in the **Search programs and files** field. Right-click cmd.exe and select **Run as Administrator**.

2. Type the following command:

```
sc query "<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              : 4  RUNNING
                         (STOPPABLE, NOT_PAUSABLE, ACCEPTS_PRESHUTDOWN)
    WIN32_EXIT_CODE    : 0  (0x0)
    SERVICE_EXIT_CODE  : 0  (0x0)
    CHECKPOINT         : 0x0
    WAIT_HINT          : 0x0
```

Platinum Performance Monitoring Utilities

Three performance monitoring tools are included in the Platinum installation. These FairCom utilities are installed in the **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. *(Note: One advantage of the c-treeACEMonitor tool is the ability to track connections to the STI Server that aren't displayed in the Active User List.)*

- **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.

Figure 5, c-treeACE Gauges utility (Advanced View)

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 reenter the information each time you use c-treeGauges and c-treePerfMon.
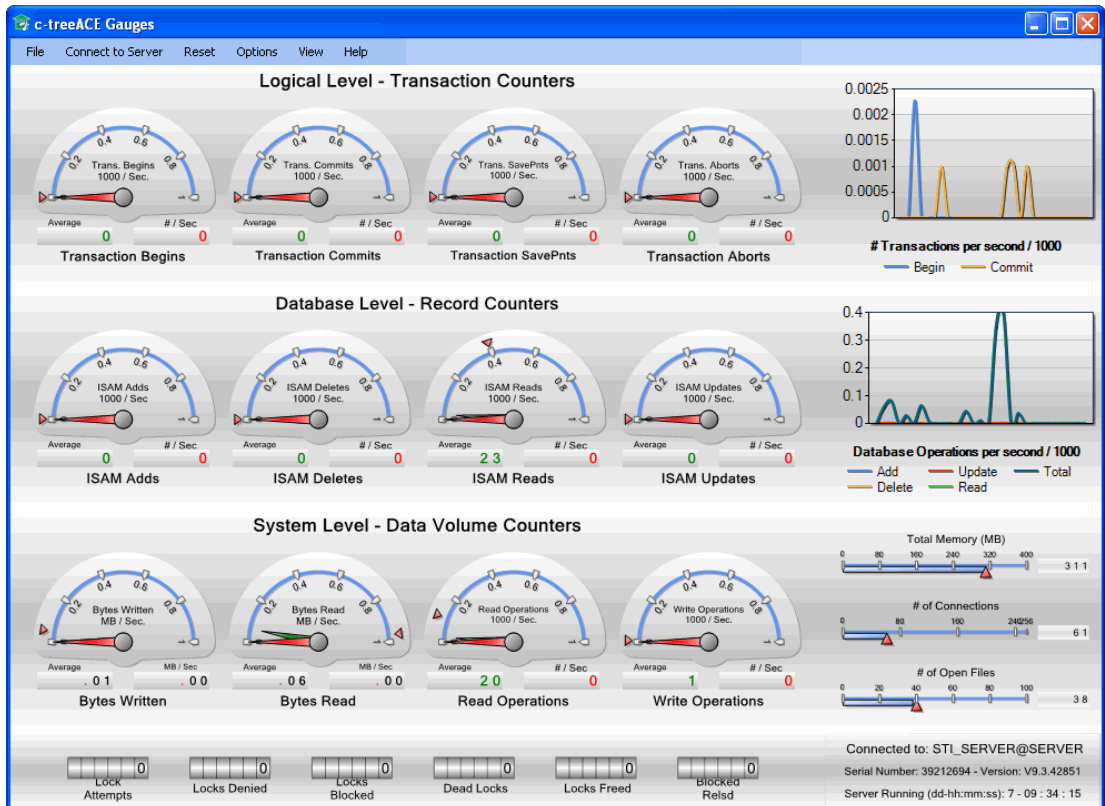
Figure 6, c-treeACE Gauges utility (Classic View)
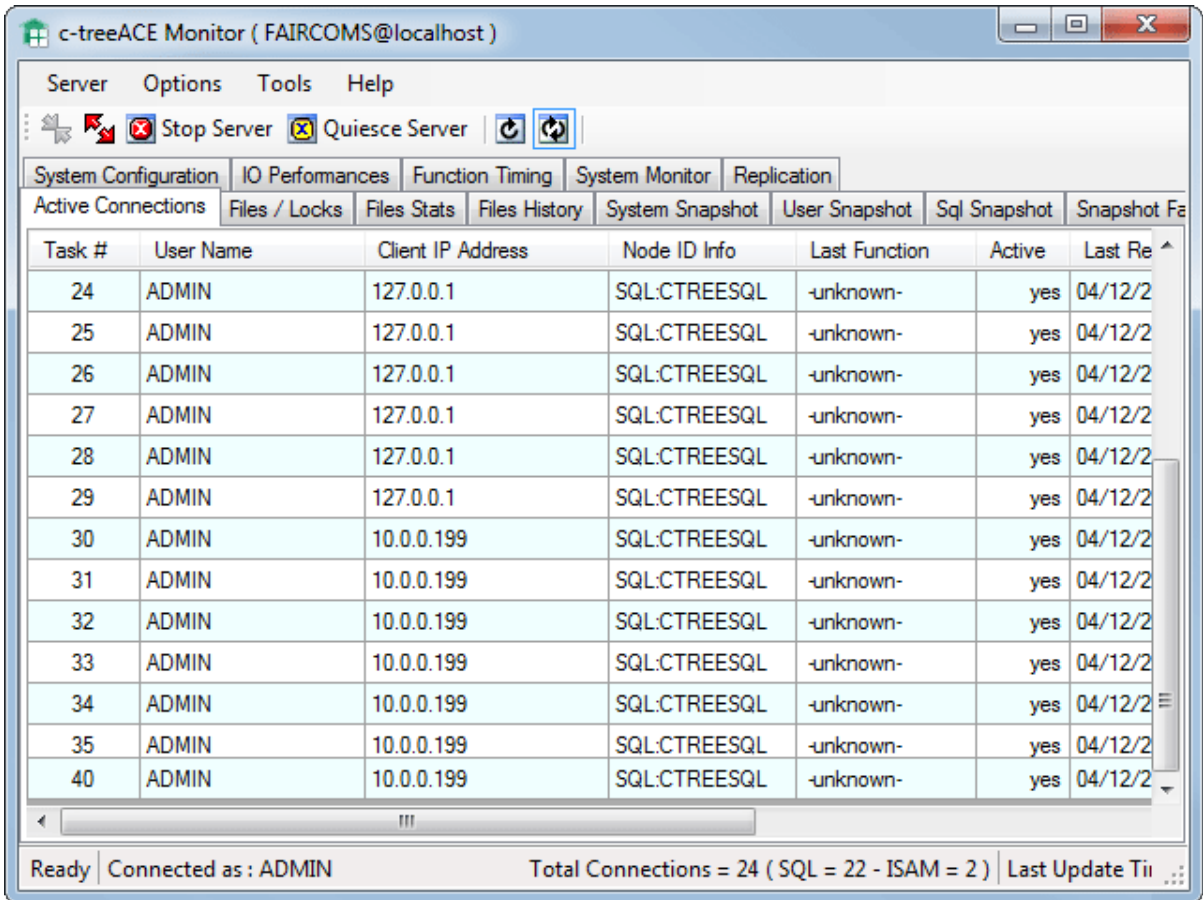
Figure 7, c-treeACE Gauges Utility

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

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 8 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 *(page 25)*.	Shut down the Desktop Interactive Program, and start the service again.
2	The required CTSRVR.CFG file is invalid *(page 51)*, 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 8, 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.

HotBackup

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.

Standard (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. However, the Back Up Data Files program requires all users to exit the software before proceeding. 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 18.

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.

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.

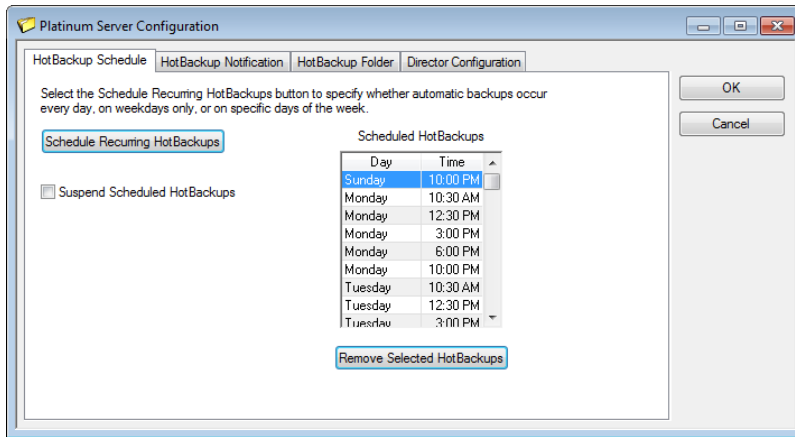|	
HotBackup Schedule	The **HotBackup Schedule** tab *(Figure 9)* displays a list of scheduled HotBackups. It is used to create or delete scheduled HotBackups, as well as temporarily suspend scheduled HotBackups. HotBackups can be scheduled for varying times of the day on weekdays, every day of the week, or specific days of your choosing.

Figure 9, HotBackup Schedule

Schedule Recurring HotBackups

The Schedule Recurring HotBackups window *(Figure 10)* is used to schedule one or more HotBackups. It is accessed via the **Schedule Recurring HotBackups** button on the **HotBackup Schedule** tab *(Figure 9)*.
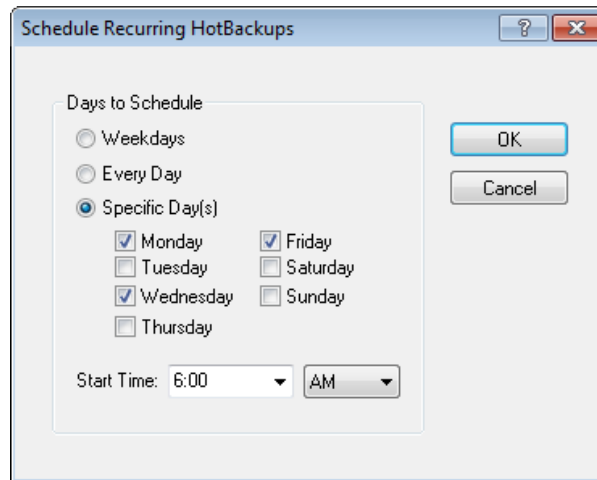

Figure 10, Schedule Recurring HotBackups

HotBackup Notification

The **HotBackup Notification** tab *(Figure 11)* 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.
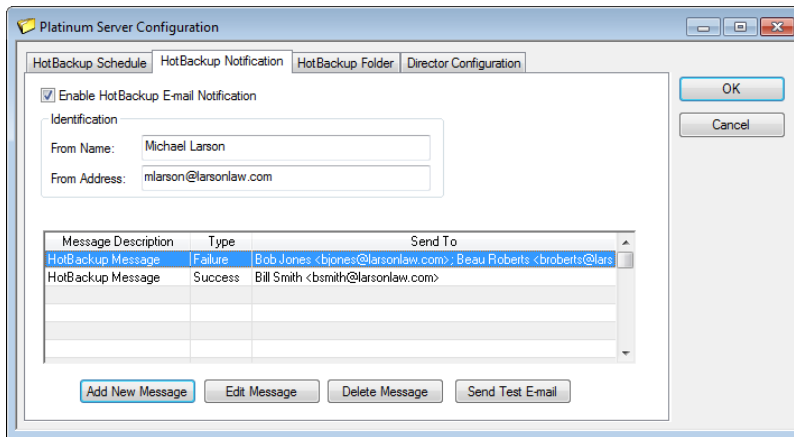
Figure 11, HotBackup Notification

Outgoing E-mail Configuration

The Outgoing E-mail Configuration window *(Settings | Outgoing E-mail Configuration) (Figure 12)* is used to configure the settings necessary to send e-mail messages. It is accessible from the System Configuration software program.
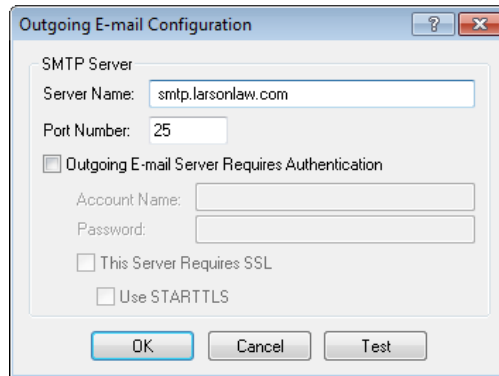
Figure 12, Outgoing E-mail Configuration

Notification Message

The Notification Message window *(Figure 13)* 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 11)*.
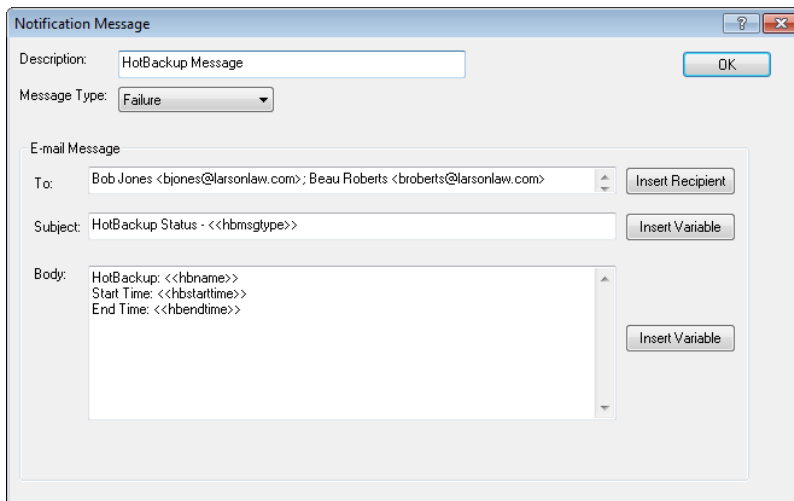

Figure 13, Notification Message

HotBackup Folder

The **HotBackup Folder** tab *(Figure 14)* 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, and the Directory Structure section of this guide *(page 41)*.
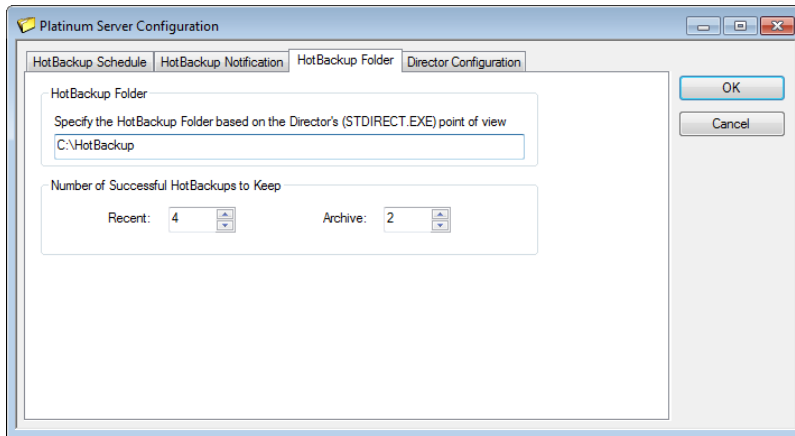

Figure 14, HotBackup Folder

Director Configuration

The **Director Configuration** tab *(Figure 15)* 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.
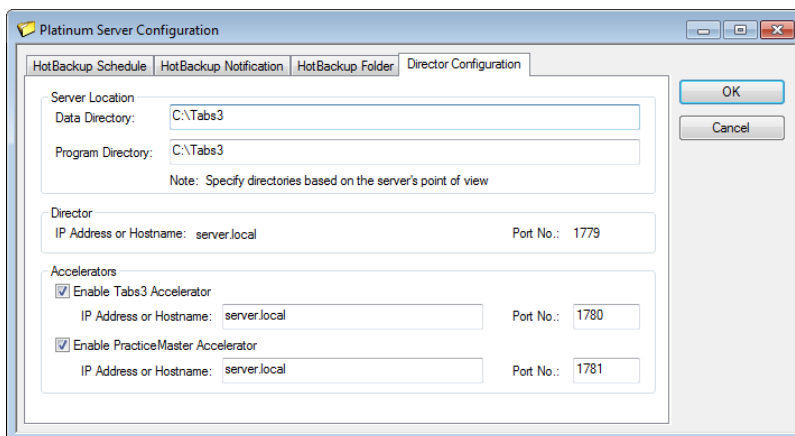

Figure 15, Director Configuration

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 42)*.

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 40)*. 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 40)*. The main benefit for storing HotBackups in this manner is it makes it very convenient to maintain regular external backups.

*Figure 16, HotBackup directory structure configured to use "2" for **Recent** and "2" for **Archive***

For example, suppose you want to maintain 10 HotBackups at any on e 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
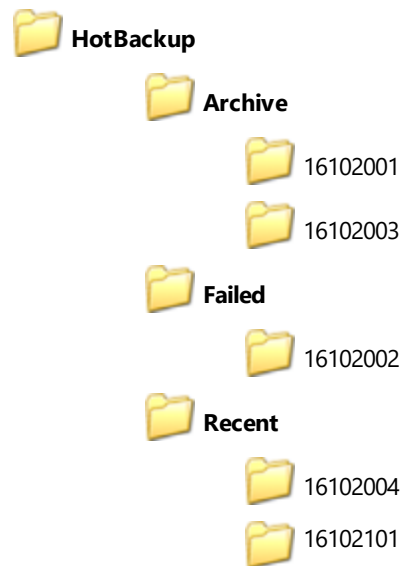
Recent folder, plus 7 in the Archive folder), while the 3 most recent HotBackups will always be in the Recent folder.

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 20, 2016 will be named "16102001"; and the second HotBackup made on that same day will be named "16102002".

October 20, 2016

10/20/16

16	**10**	**20**	**01**
Year	Month	Day	Num

Figure 17, HotBackup Naming Convention

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***).

Name	Type	User	Start Time	End Time	Result
15100201	Scheduled		10/02/2015 07:00:00	10/02/2015 07:04:35	Succeeded
15100301	Scheduled		10/03/2015 07:00:00	10/03/2015 07:05:26	Succeeded
15100601	Scheduled		10/06/2015 07:00:00	10/06/2015 07:05:47	Succeeded
15100701	Scheduled		10/07/2015 07:00:00	10/07/2015 07:05:18	Succeeded
15100801	Scheduled		10/08/2015 07:00:00	10/08/2015 07:06:03	Succeeded
15100901	Scheduled		10/09/2015 07:00:00	10/09/2015 07:05:56	Succeeded
15101001	Scheduled		10/10/2015 07:00:00	10/10/2015 07:06:17	Succeeded
15101002	On Demand	JANE	10/10/2015 14:24:17	10/10/2015 14:30:46	Succeeded

Figure 18, 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.
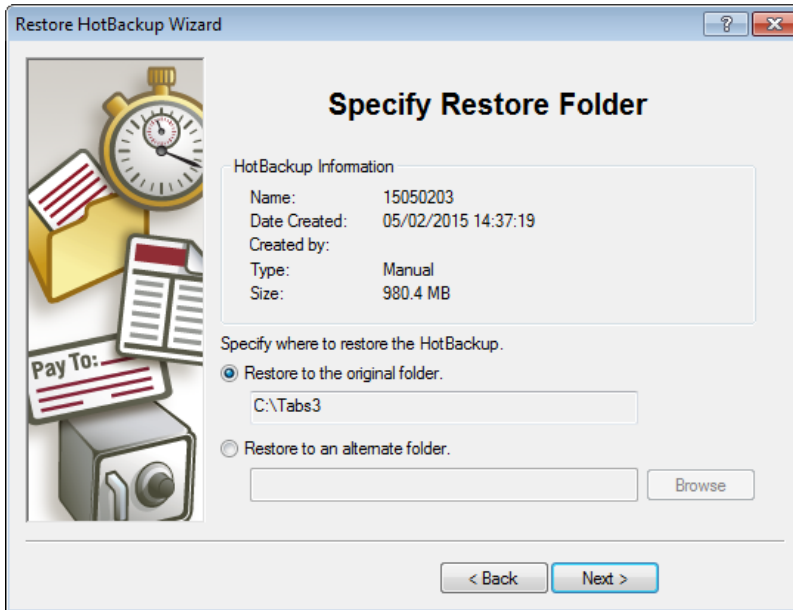

Figure 19, Restore HotBackup Wizard

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 20, 2016 and your HotBackup folder is set as C:\HOTBACKUP on the server computer, then you must first locate the 16102001 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\16102001\BACKUP
```

Note: The HotBackup folder is defined on the **HotBackup Folder** tab of the Platinum Server Configuration window in System Configuration *(page 40)*.

For additional information on restoring a HotBackup, refer to Knowledge Base Article **R11199** - "Restoring a HotBackup" at **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:

support.Tabs3.com

Encryption

The Platinum SQL Data Encryption utility is used to encrypt Tabs3 and PracticeMaster data files that may contain sensitive information. Once data files are encrypted, they can only be read by the Tabs3 and PracticeMaster Platinum SQL software. You can determine the current encryption status of the software by checking the Data Encryption field of the **Help | About** window.
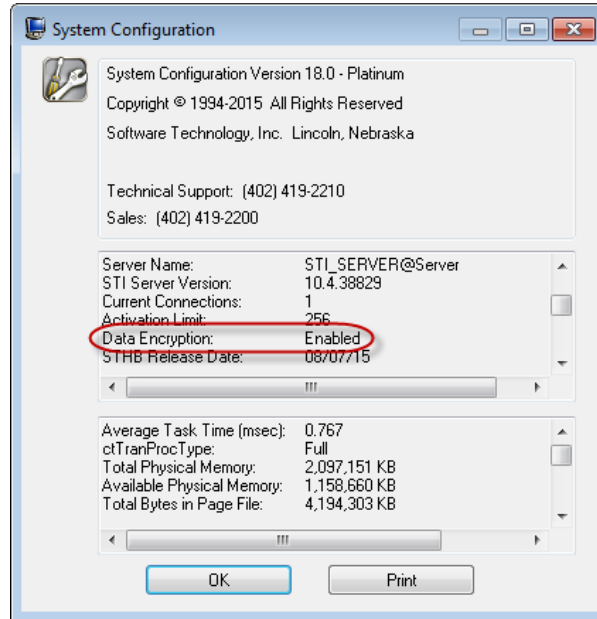

Figure 20, System Configuration Help | About window

Enabling and Removing Encryption

The process of encrypting or removing encryption from the data can be time-consuming due to the amount of data that must be processed. Therefore we recommend always performing the process on the Platinum server rather than a workstation.

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

▶ **To encrypt the data files**

1. Have all users exit the Tabs3 and PracticeMaster software.

2. From the Platinum server computer, launch System Configuration and select *Platinum | Data Encryption*.
   a. Select **Encrypt** and click **Next**.
   b. Select the **Yes, encrypt the data** check box.
   c. Click **Next** to begin the encryption process.

3. Upon completion, click **OK**.

▶ **To remove data encryption**

1. Have all users exit the Tabs3 and PracticeMaster software.

2. From the Platinum server computer, launch System Configuration and select *Platinum | Data Encryption*.
   a. Select **Remove Encryption** and click **Next**.
   b. Select the **Yes, remove the data encryption** check box.
   c. Click **Next** to begin the encryption removal process.

3. Upon completion, click **OK**.

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

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 .
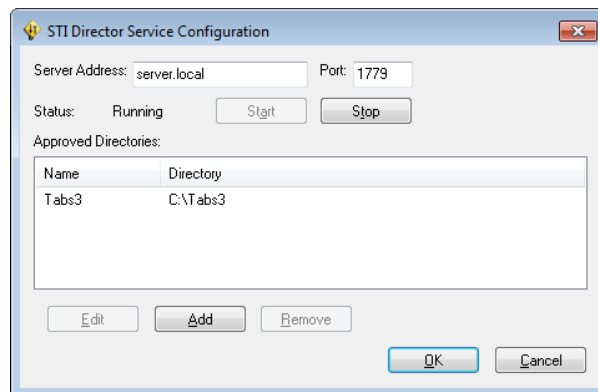

Figure 21, STI Director Service Configuration window

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 14)*. 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 Tabs3and 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 40 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 22, 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 **R11644** - "CTSRVR.CFG Configuration File" at **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 54)*.

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 54)*.

SPECIAL CACHE FILE	Special Cache files are assigned when memory allocation is configured in System Configuration. Data files with this designation remain cached while the software is running, regardless of how recently they have been accessed. This improves access time for frequently used data files. The amount specified after the "#" indicates the amount of the file to be cached in megabytes.

PRIME_CACHE / PRIME_INDEX

Prime Cache and Prime Index files are assigned when memory allocation is configured in System Configuration. Files with this designation are cached when accessed, and are removed from the cache when no longer opened, or when the cache limit has been reached and a more recently accessed file needs to be cached. The amount specified after the "#" indicates the amount of the file to be cached in megabytes.

NO_CACHE

No Cache files are assigned when memory allocation is configured in System Configuration. Files with this designation are not cached by the server due to their size or structure.

VSS_WRITER

This setting determines whether support for the Volume Shadow Copy Service (VSS) is enabled for third-party backup programs. VSS_WRITER is disabled by default, and automatically configured when memory allocation is configured in System Configuration *(page 56)*.

> **Note:** See the "Configuring Volume Shadow Copy Service (VSS) Writer" section for more information about this feature *(page 47)*.

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.
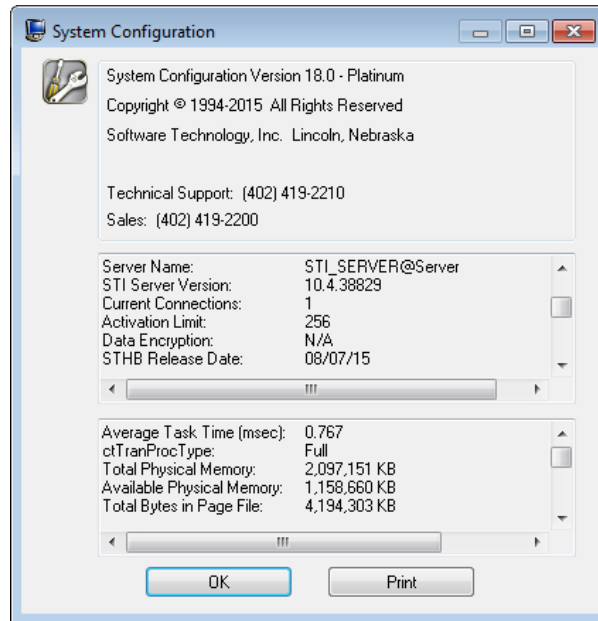
Figure 23, Help | About window

SERVER_NAME   The SERVER_NAME is STI_SERVER. This name must match
                                  the server name in the STSRVR.CFG file *(page 50)*.

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.

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, filtering records in PracticeMaster, and SQL Queries in Platinum SQL.

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.

Configuring Server Cache

Tabs3 and PracticeMaster Platinum software includes a tool in System Configuration that displays current cache information and allows you to specify the amount of memory you want to allocate to caching data and index files. You can access this tool by selecting *Platinum | Platinum Server Configuration* and clicking the **Server Cache** tab.
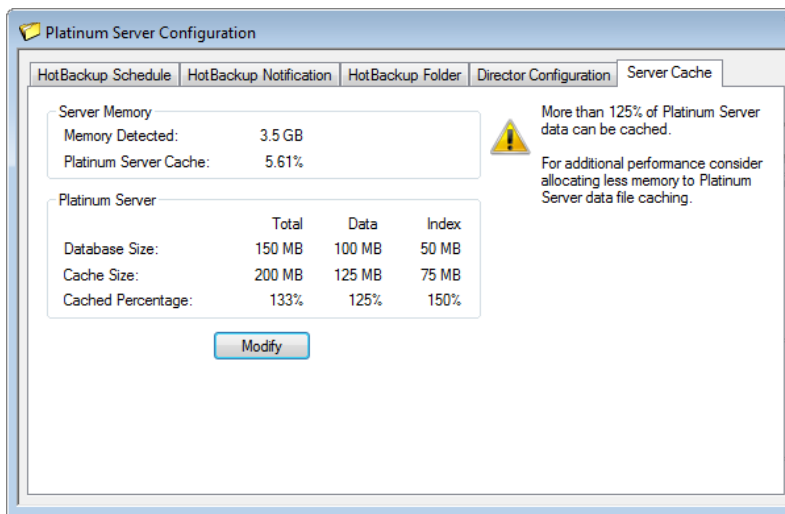
Figure 24, Platinum Server Configuration - ***Server Cache*** *tab*

This window displays information regarding the available memory and current caching configuration. Click the **Modify** button to adjust your current cache settings.
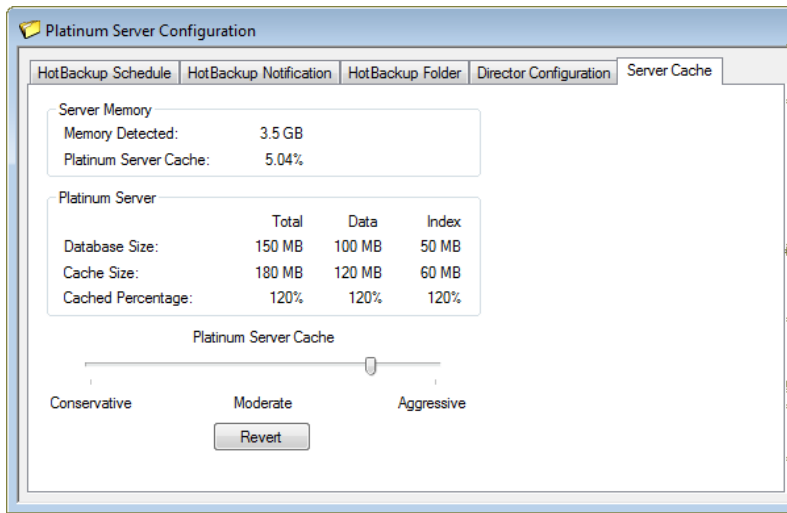

*Figure 25, **Server Cache** tab in Modify mode*

Once the **Modify** button has been clicked, it is replaced with a **Platinum Server Cache** slider with a range from **Conservative** (minimum memory allocation) to **Aggressive** (maximum memory allocation). Clicking **Revert** will remove the slider and revert any change to the slider's position. Once you have specified the cache level you prefer, click **OK** to apply the change. This will update the CTSRVR.CFG file with the new memory allocation settings. However, the changes will not take effect until the STI Server service is restarted or the Platinum Server computer is rebooted.
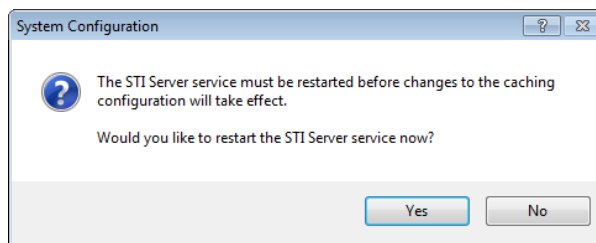
Figure 26, STI Server service restart confirmation window

You will be prompted to restart the STI Server Service. Click **Yes** to automatically log off all users and restart the STI Server Service. Click **No** if you do not want to apply the change at this time. If you choose not to restart the STI Server service, the new cache settings will not be applied until the next time the STI Server service is restarted or the Platinum Server computer is rebooted.

▶ **To restart the STI Server service using the Services Applet**

1. Have all users log out of the Tabs3 and PracticeMaster software.

2. From the server, select ***Start | Control Panel | Administrative Tools***.

3. Double-click the Services icon.

4. Right-click the **STI Server Service** and select **Restart**.

▶ **To restart the STI Server service from a Command Prompt window**

1. Have all users log out of the Tabs3 and PracticeMaster software.

2. From the server, open an elevated command prompt. *(See KB Article **R11434**, "User Rights Needed to Install and Use Tabs3 and PracticeMaster Software," for the steps to open an elevated command prompt.)*

3. Type the following command:

   SC STOP "STI SERVER SERVICE"

4. Type the following command:

   SC START "STI SERVER SERVICE"

Messages

It is important to avoid allocating too little or too much memory to the Platinum Server cache, as either can impact performance. Allocating too little memory will prevent Tabs3 and PracticeMaster from efficiently caching data. Allocating too much memory will prevent other processes on the server from utilizing the excess memory, potentially slowing down the entire server. The following messages are displayed when your cache setting is outside the recommended range.

Less than 5% of server RAM is being utilized for caching. For additional performance consider allocating more memory to Platinum Server data file caching.

> This indicates that not enough memory is being allocated to caching, which can result in reduced performance when using the software. However, this message will not be displayed if the **Cached Percentage** value is 100% or greater, which can occur if the amount of available memory is significantly larger than the size of the Tabs3 and PracticeMaster database.

Less than 20% of Platinum Server data can be cached. For additional performance consider allocating more memory to Platinum Server data file caching.

> This indicates that not enough memory is being allocated to caching, which can result in reduced performance when using the software.

Less than 5% of server RAM is being utilized for caching. Less than 20% of Platinum Server data can be cached. For additional performance consider allocating more memory to Platinum Server data file caching.

This indicates that not enough memory is being allocated to caching, which can result in reduced performance when using the software.

Less than 20% of Platinum Server data can be cached. More than 20% of server RAM is being utilized for caching. For additional performance consider adding RAM to the server.

This indicates that not enough memory is being allocated to caching, which can result in reduced performance when using the software. Additionally, more than the recommended percentage of memory is being allocated to caching, which can result in reduced performance of other software on the server. Adding additional memory to the server will allow you to allocate more memory to caching and reduce the percentage of memory needed for caching.

More than X%/3GB of server RAM is being utilized for caching. Make sure there is enough server RAM for file caching and other server programs. Consider adding RAM to the server.

This indicates that more than the recommended percentage of memory is being allocated to caching, which can result in reduced performance of other software on the server. Adding additional memory to the server will reduce the percentage of memory needed for caching. (Note: The exact wording of this message will vary depending on the server and software being used. See the Maximum Memory section of the Server Cache Notes topic for more information.)

More than 125% of Platinum Server data can be cached. For additional performance consider allocating less memory to Platinum Server data file caching.

This indicates that more memory than is necessary is being allocated to caching, which can result in reduced performance of other software on the server, since the allocated memory is not available to other software on the server.

Changes Made to CTSRVR.CFG by the Server Cache Tool

A new section will be added just before the DAT_MEMORY value containing the following information:

```
; Start of Cache Configuration
; Optimizer Date: Date the optimization was performed.
; Optimizer Signature: Used to determine if the CTSRVR.CFG was modified since the last optimization.
; Optimizer Computer: Name of the computer from which the optimization was performed.
; Optimizer User: Name of the user who performed the optimization.
; Optimizer Aggressiveness: Position of the Platinum Server Cache slider from left (0%)
```

```
to right (100%).
; Optimizer System Memory: Detected memory on the Platinum Server computer.
; Optimizer Server Machine: Name of the Platinum Server computer.
; Optimizer Server Application: Whether the Platinum Server computer is 32-bit or 64-
bit.
```

After this section, the following settings are specified:

DAT_MEMORY	The Cache Size value for the Data column will be assigned to the DAT_MEMORY setting.
IDX_MEMORY	The Cache Size value for the Index column will be assigned to the IDX_MEMORY setting.
	Additionally, the following settings will be updated or added if not already present:
SPECIAL_CACHE_FILE	Data files with this designation remain cached while the software is running, regardless of how recently they have been accessed. This improves access time for frequently used data files. The amount specified after the "#" indicates the amount of the file to be cached in megabytes.
PRIME_CACHE	Files with this designation are cached when accessed, and are removed from the cache when no longer opened, or when the cache limit has been reached and a more recently accessed file needs to be cached. The amount specified after the "#" indicates the amount of the file to be cached in megabytes.
PRIME_INDEX	Files with this designation are cached when accessed, and are removed from the cache when no longer opened, or when the cache limit has been reached and a more recently accessed file needs to be cached. The amount specified after the "#" indicates the amount of the file to be cached in megabytes.
NO_CACHE	Files with this designation are not cached by the server due to their size or structure.

After the NO_CACHE settings, the CTSRVR.CFG will display the following:

```
; End of Cache Configuration
```

This marks the end of the settings controlled by the Server Cache tool, with the following exception:

VSS_WRITER

System Configuration will enable the VSS_WRITER functionality (if currently disabled) under the following circumstances:

- When running Platinum software on a 32-bit Platinum Server computer.
- When running Platinum SQL software on a 64-bit Platinum Server computer.

> **Note:** See KB Article **R11430**, "Using Volume Shadow Copy Service (VSS) to Back Up Tabs3 and PracticeMaster Software," for more information on VSS.

Memory Allocation Limits

The amount of memory that can be allocated to the Platinum Server Cache depends on the answers to the following questions:

- **Server:** Is the server running a 32 or 64-bit version of Windows?
- **Software:** Is the Tabs3 and PracticeMaster software Platinum (32-bit) or Platinum SQL (64-bit)?
- **RAM:** How much physical memory (RAM) is installed on the server?

▶ **How Tabs3 determines the minimum memory allocation**

The minimum memory allocation for the Platinum Server cache is 5% of available memory (i.e., the **Memory Detected** value from the **Server Cache** tab) or 100% of the size of the combined data and index files, whichever is smaller, with an absolute minimum allocation of 150 MB (100 MB for data files and 50 MB for index files). The table below defines the minimum memory allocations based on available memory, whether the Windows server is 32-bit or 64-bit, and whether the software is Platinum (32-bit) or Platinum SQL (64-bit).

		Total Memory (RAM) Installed on Server		
Server	Software	3.9 GB or Less	3.9 GB to 12 GB	12 GB or More
32-bit	32-bit	5% of available memory (150 MB - 205 MB)	N/A	N/A
64-bit	32-bit	5% of available memory (150 MB - 205 MB)	5% of available memory (205 - 614 MB)	5% of available memory (614 MB - 3,072 GB)
64-bit	64-bit	5% of available memory (150 MB - 205 MB)	5% of available memory (205 - 614 MB)	5% of available memory (614 MB+)

▶ **How Tabs3 determines the maximum memory allocation**

The maximum memory allocation for the Platinum Server cache is 125% of the size of the combined data and index files. The table below defines the maximum memory allocations based on available memory, whether the Windows server is 32-bit or 64-bit, and whether the software is Platinum (32-bit) or Platinum SQL (64-bit).

Server	Software	Total Memory (RAM) Installed on Server		
		3.9 GB or Less	**3.9 GB to 12 GB**	**12 GB or More**
32-bit	32-bit	20% of available memory (205 MB - 819 MB)	N/A	N/A
64-bit	32-bit	20% of available memory (205 MB - 819 MB)	40% of memory up to 3GB (1638 MB - 3072 MB)	3GB (3072 MB)
64-bit	64-bit	20% of available memory (205 MB - 819 MB)	40% of available memory (1638 MB - 4915 MB)	60% of available memory (7373 MB+)

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 54)*.

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 **R11596** - "Configuring the PracticeMaster Platinum Exchange Connector" at **support.Tabs3.com**.

Legacy ODBC Driver

When using the legacy stand-alone 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 **support.Tabs3.com**.

Note: The legacy stand-alone ODBC driver is not accessible with Platinum SQL. Platinum SQL includes more powerful ODBC drivers to use instead. More information regarding the Platinum SQL drivers can be found in *Operating Platinum SQL* section of this guide *(page 65)*.

Using Platinum SQL ODBC Features

This section discusses how to configure the Platinum SQL Server software to provide data to third party programs, how to install and configure the FairCom c-treeACE ODBC drivers, and how to enable encryption of the Tabs3 and PracticeMaster data.

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.

Several steps must be performed prior to accessing the Tabs3 and PracticeMaster data:

- **Initializing the SQL Database**
- **Configuring User Rights**
- **Initializing SQL Profiles**
- **Installing the ODBC Drivers**
- **Configuring the ODBC Data Source**

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.
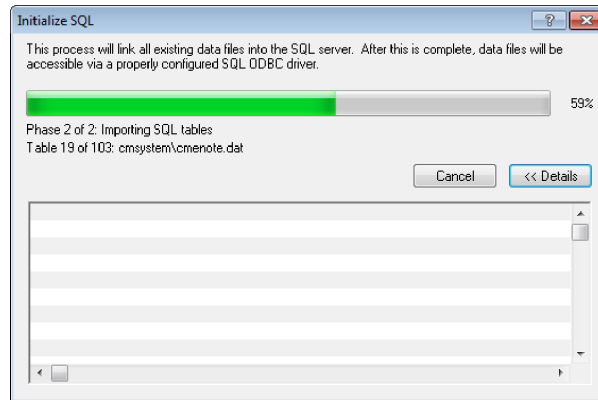
Figure 27, Initialize SQL

6. 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 the Manager 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 profiles to users who need SQL access in addition to their existing access profiles.

▶ **To configure an Access Profile for SQL access**

1. Launch System Configuration, and select *File | Open | Access Profile*.

2. Click the **Access ID** drop down and select the access profile you want to edit from the list.

3. From the **System Activity** tab, select the **SQL Access to System Config Files** check box to enable access to the System Configuration database.
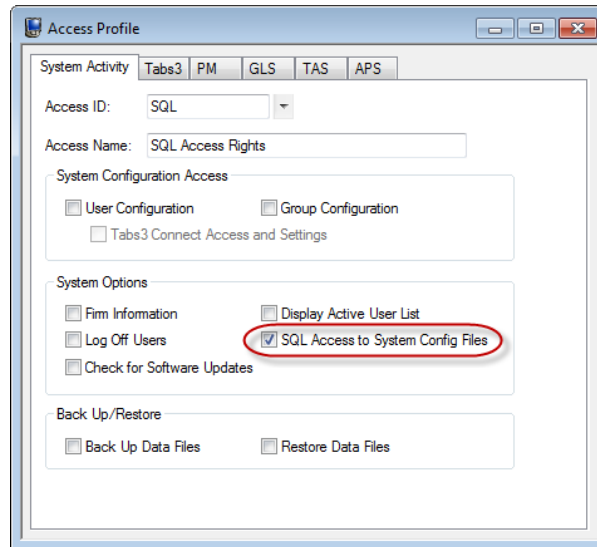
Figure 28, System Activity Tab

4. 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.
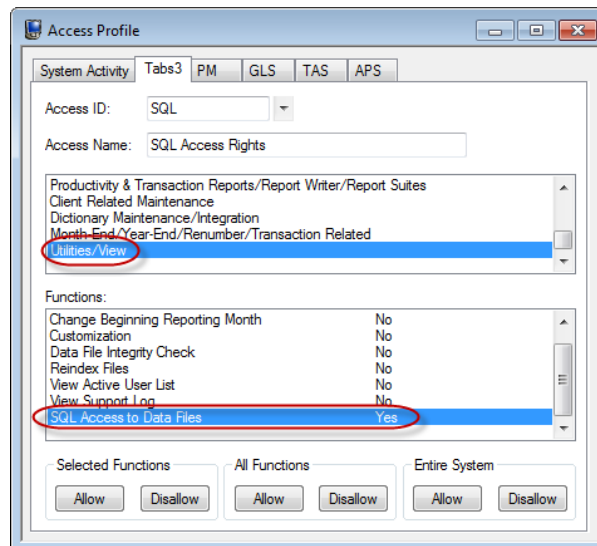
Figure 29, SQL Access Rights

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

6. Perform steps 4 and 5 for each program that members of this Access Profile should have access to via SQL.

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.
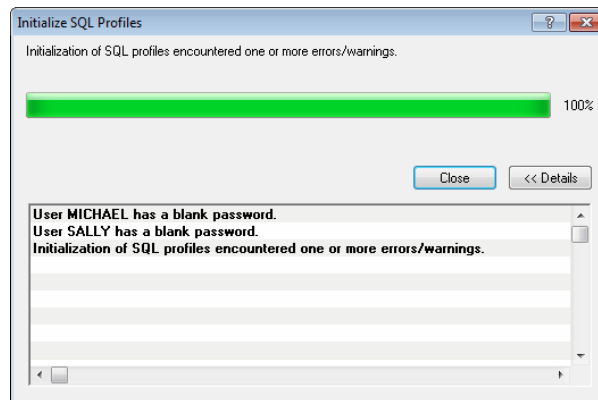
Figure 30, Initialize SQL Profiles

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 10 64-bit may have the 32-bit version of Microsoft Excel 2013. 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_ODBC** 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 section.

Note: These steps must be completed on each workstation that will be accessing the Platinum SQL data.

Note: An ODBC Data Source is not required if you are accessing the Platinum SQL Server using Microsoft SQL Server Management Studio. However, if you are connecting using other products, such a Microsoft Access or Crystal Reports, an ODBC Data Source is required.

▶ **Preliminary Steps**

1. Initialize the SQL database *(page 65)*.

2. Configure User Rights for any users that will be accessing the SQL database, including users with manager rights *(page 66)*.

3. Initialize SQL Profiles *(page 68)*.

4. Install the ODBC Drivers — 32-bit and 64-bit *(page 68)*.

▶ **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 the 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 68)*.

Figure 31, 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 66.)*

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. Leave the **Default Fetch Size** and **Default Query Timeout** fields blank.

12. 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**.

> **Important Note:** If you are configuring a System DSN on a 64-bit system, and need to access the System DSN using a 32-bit program, you must configure the System DSN using both the 64-bit and 32-bit ODBC Data Source Administrators. The previous steps will configure the 64-bit version. To configure the 32-bit System DSN, use the following steps:
>
> 1. Close the ODBC Data Source Administrator window (if open).
>
> 2. Open the 32-bit ODBC Data Source Administrator (C:\Windows\SysWOW64\odbcad32.exe).
>
> 3. Repeat the steps to **configure the OBDC Data Source**, beginning with step 2.

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 69)*. *(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 69)*.

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**.

▶ **Configuring MS SQL Server Management Studio without an ODBC Data Source**

1. <u>**Install the appropriate FairCom c-treeACE ODBC drivers for your workstation.**</u> *(page 68)*

2. Start the Microsoft SQL Server 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**. *(Note: If this option is not available, you may need to install the Microsoft 64-bit OLE DB Provider for ODBC on your Microsoft SQL Server.)*

   d. For the **Product name**, enter **ODBC**.

   e. For the **Provider String**, enter the following string:
      ```
      DRIVER=c-treeACE ODBC Driver;HOST=<server name or IP
      Address>;DATABASE=Tabs3;SERVICE=6597;OPTIONS=DHQQII;CHARSET
      NAME={"ASCII" ASCII or ISO8859-1(CP 1252)};PRSRVCUR=OFF;
      ```

      > **Note:** You will need to edit the "HOST=" value to include your Platinum Server computer's network name or IP address. Additionally, if your firm has changed the Platinum SQL Server port, you will need to replace 6597 in the "SERVICE=" value to the assigned port number.

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 71)*, 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. More information on formatting queries can be found in Knowledge Base Article **R11461**, "Introduction to Platinum SQL Queries".

Learning SQL

We recommend that users familiarize themselves with SQL prior to performing queries in Platinum SQL. There are multiple resources available both online and in print form. When selecting a resource, be aware that many of these texts are aimed at a particular product such as Microsoft SQL Server, MySQL, etc. When selecting an SQL resource, we recommend choosing one that is aimed at general SQL usage.

Web Resources

- **Wikipedia's SQL article**
- **Wikibooks - Structured Query Language**
- **SQL Tutorial from W3Schools.com**
- **SQL Tutorial (beginner-sql-tutorial.com)**

Printed Books

- *Learning SQL* - Alan Beaulieu
- *Teach Yourself SQL in 10 minutes* - Ben Forta
- *Head First SQL: Your Brain on SQL* - A Learner's Guide - Lynn Beighley

- *The Language of SQL: How to Access Data in Relational Databases* - Larry Rockoff

- *A Visual Introduction to SQL* - David Chappell and J. Harvey Trimble Jr.

- *SQL for Dummies* - Allen G. Taylor

- *SQL Queries for Mere Mortals: A Hands-On Guide to Data Manipulation in SQL* - John L. Viescas and Michael J. Hernandez

- *SQL: Visual QuickStart Guide* - Chris Fehily

- *SQL in a Nutshell* - Kevin Kline, Brand Hunt, and Daniel Kline

> **Note:** These web sites and books are intended as a sample of the resources available for learning SQL. Tabs3 does not endorse or guarantee the quality of any of the references listed above. Users wishing to learn SQL are advised to sample the available materials and select one or more guides appropriate to their learning style.

FairCom Reference Guide

FairCom provides a reference guide for c-treeACE SQL, which is the basis of the Platinum SQL Server. This guide details the various SQL functions, terms, and syntax used by the Platinum SQL Server. The web-based (HTML) version of the reference guide is available at **http://www.faircom.com/doc/sqlref/index.htm**. A PDF version is also available at **http://www.faircom.com/doc/sqlref/sqlref.pdf**.

> **Note:** This reference guide is a technical guide aimed primarily at programmers and is not intended as an introduction to SQL.

Platinum SQL Syntax Information

Knowledge Base Article **R11426**, "Platinum SQL Syntax Information" contains detailed information on known differences in SQL syntax between Platinum SQL and other commonly used products.

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.

▶ **To assign a new Platinum SQL Server port**

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 a 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 a 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.

Uninstalling Platinum Server

This section 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 32.
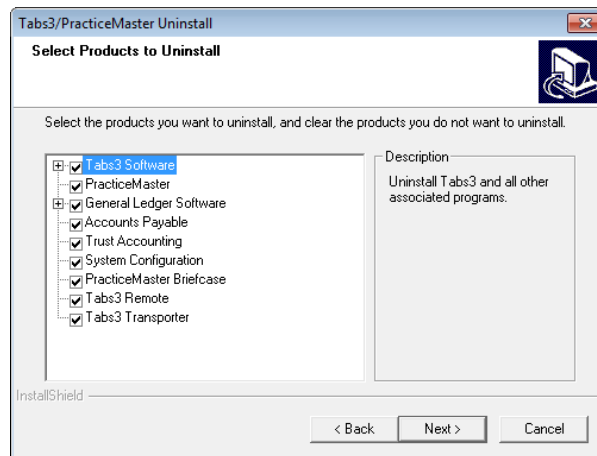
Figure 32, Uninstall window

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 **R11611** - "Uninstalling Tabs3 Software" at **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 **R11624** - "Moving Platinum Software" at:

support.Tabs3.com

Index