

System Configuration Report Pack











PracticeMaster

General Ledger

Accounts Payable

Trust Accounting

TABS3.COM

System Configuration Report Pack

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Version 19 (Monday, April 29, 2019)

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User List	

User List

User ID	User Name Email Address	Verification ID	Logon User	Access 1	Access 2	Access 3 Access 4 Calendar Access Rights	Access 5
BLANK)		0105	No - Inactive				
ALICE	Alice M. Thompson athompson@jensenmartinlaw.com	0059	Yes	MANAGER BOB PAM UNASSIGN KENDRA MLJ	Edit Public Edit Public Edit Public Edit Public Edit Public	Browse Private Browse Private	Edit Private
				RON (BLANK)	Edit Public Edit Public	Browse Private	Edit Private
CATHY	Cathleen Trudore OfficeMgr@jensenmartinlaw.com	0088	Yes	MANAGER (BLANK)	Edit Public		
CHERYL	Cheryl Bradley cbradley@jensenmartinlaw.com	0089	Yes	APGL (BLANK)	BILLING Edit Public	DATA PMDATA	N .
DAN	Daniel H. Brady dbrady@jensenmartinlaw.com	0090	Yes	APGL (BLANK)	BILLING Edit Public	SUPERVIS	
JASON	Jason I. Masterson jmasterson@jensenmartinlaw.com Timekeepers:	0091 9 Jason I. Masterson	Yes	PMDATA (BLANK)	Edit Public		
JEN	Jennifer A. Noonan jen@jensenmartinlaw.com	0092	Yes	SUPERVIS (BLANK)	Edit Public		
JPP	Jimmy P. Praum jpp@jensenmartinlaw.com Timekeepers:	0093 4 Robert O. Burns 10 Jimmy P. Praum	Yes	DATA (BLANK)	PMDATA Edit Public		
KENDRA	Kendra I. Michaels	0094	Yes	BILLING (BLANK)	PMDATA Edit Public	PMONLY	
MLJ	Michael L. Jensen mjensen@jensenmartinlaw.com	0095	Yes	SUPERVIS (BLANK)	Edit Public		
PAM	Paula Ann Martin PMartin@jensenmartinlaw.com	0075	Yes	DATA UNASSIGN KENDRA MLJ DON	PMDATA Edit Public Edit Public Edit Public	PMONLY SUPERV Browse Private	/IS
				(BLANK)	Edit Public	Browse Private	Eult Private
ROBERT	Robert O. Burns Rburns@jensenmartinlaw.com	0096	Yes	PMDATA (BLANK)	Edit Public		
RON	Ronald P. Anderson ron@jensenmartinlaw.com	0097	Yes	MANAGER (BLANK)	Edit Public		
STCONV19	Version 19 Conversion User	0104	No - Inactive				
UNASSIGN	Unassigned Court Item	0084	No				

User ID	User Name Email Address	Verification ID	Logon User
(BLANK)		0105	No - Inactive
ALICE	Alice M. Thompson athompson@jensenmartinlaw.com	0059	Yes
CATHY	Cathleen Trudore OfficeMgr@jensenmartinlaw.com	0088	Yes
CHERYL	Cheryl Bradley cbradley@jensenmartinlaw.com	0089	Yes
DAN	Daniel H. Brady dbrady@jensenmartinlaw.com	0090	Yes
JASON	Jason I. Masterson jmasterson@jensenmartinlaw.com	0091	Yes
JEN	Jennifer A. Noonan jen@jensenmartinlaw.com	0092	Yes
JPP	Jimmy P. Praum jpp@jensenmartinlaw.com	0093	Yes
KENDRA	Kendra I. Michaels	0094	Yes
MLJ	Michael L. Jensen mjensen@jensenmartinlaw.com	0095	Yes
PAM	Paula Ann Martin PMartin@jensenmartinlaw.com	0075	Yes
ROBERT	Robert O. Burns Rburns@jensenmartinlaw.com	0096	Yes
RON	Ronald P. Anderson ron@jensenmartinlaw.com	0097	Yes
STCONV1	9 Version 19 Conversion User	0104	No - Inactive
UNASSIGN	I Unassigned Court Item	0084	No

The User List shows the User ID, User Name, and email address. The following options are available when printing the report:

- Include whether the user is a Logon User.
- Include access profiles and PM calendar rights.
- Include the Tabs3/PM timekeepers that have been assigned to each user.

This list can only be printed by members of the Manager access profile.

Definitions

Date

The date the list was printed.

	System Configuration Report Pack
User ID	The 8-character identifier assigned to the user. The User ID must be entered by the user to start the software. It is also used in the heading on verification lists and criteria pages and is used as the default file name when saving reports to a file.
User Name	The user's name. The User Name is included on verification lists and is shown in the Active User List when it is displayed.
Email Address	The user's email address. The email address entered here is used by the following programs:
	PracticeMaster Email Notifications Word Document Assembly HotDocs Assembly
	Tabs3 Connect Login Email
	Tabs3 Email Templates ProPay Reports
	TAS ProPay Reports
Verification ID	The Verification ID is a four-digit number that is assigned to each user. The Verification ID is used internally.
Logon User	A Yes in this column indicates the user will be using the software as opposed to being a resource (such as rooms or equipment) that is set up as a user for scheduling purposes in PracticeMaster.
Access 1-5	The access profiles shown are the access profiles assigned to the user. Each user can be assigned up to 5 access profiles using the User Configuration program. Users have the rights of each access profile to which they are assigned.
Calendar Access Rights	The Calendar Access Rights are shown on the User List under the access profiles assigned to each user. These rights represent the rights that the user has to other users' calendar records. By default, all users who have access rights to the Calendar can browse all users' public calendar records. For example, in the report on page 4, user Alice has rights to edit Ron's public calendar records. Therefore, she can edit Ron's public calendar records as well as her own calendar records (both public and private). She also has access to Ron's private calendar records. It is important to note that the Calendar Rights shown for user Alice are not the same as the Calendar Rights that are granted to Alice's calendar records. If you were to access Alice's user record via the User Configuration program and click the Calendar Rights button, you would see that there are no non-manager users with rights to edit Alice's public or private calendar records. Keep in mind that any manager has the ability to edit public, browse private and edit private calendar records for all users.
Timekeepers	If using Tabs3 or PracticeMaster, Tabs3/PM timekeepers can optionally be assigned to the user. Assigning a timekeeper to a user indicates that the user can access transactions and productivity figures only for that timekeeper. The user will not be allowed access to transactions and productivity figures for other Tabs3 timekeepers. Since members of the Manager access profile have access to all information, Tabs3 timekeepers cannot be assigned to users who are members of the Manager access profile.

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Group List

Date: 11/28/	2018	Group List		Page: 1
Group ID	Group Name	User ID	User Name	
ANDERSON	Anderson's Staff	JASON KENDRA RON	Jason I. Masterson Kendra I. Michaels Ronald P. Anderson	
JENSEN	Jensen's Staff	DAN JPP MLJ	Daniel H. Brady Jimmy P. Praum Michael L. Jensen	
MARTIN	Martin's Staff	CHERYL JEN PAM	Cheryl Bradley Jennifer A. Noonan Paula Ann Martin	
PARTNERS	Firm Partners/Of Counsel	MLJ PAM ROBERT RON	Michael L. Jensen Paula Ann Martin Robert O. Burns Ronald P. Anderson	
STAFF	Staff	(BLANK) CHERYL DAN JASON JEN JPP KENDRA	Blank User Cheryl Bradley Daniel H. Brady Jason I. Masterson Jennifer A. Noonan Jimmy P. Praum Kendra I. Michaels	
TIMEKPRS	Timekeepers	JEN MLJ RON	Jennifer A. Noonan Michael L. Jensen Ronald P. Anderson	

The Group List shows the members of each group. Groups are used by PracticeMaster for calendaring, scheduling, filtering, and eNote purposes. You must be a manager to print this report.

Definitions

Date	The date the list was printed.
Group ID	The 8-character Group ID.
Group Name	The 30-character Group Name.
User ID & User Name	The User ID and User Name of each user belonging to the group.

Access Profile List

Date: 11/28/2						Access	Profile I	List						Pa		
			Sc	oftwa	re		s	ystem Co	nfiguration							
Access ID	Name	Т3	РМ	GL	TR	AP	User	Group	Connect	Firm	Active	Log Off	SQL	Updates	Back Up	Restore
APGL	APS/GLS/TAS usage	Y	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N	N	N
BILLING	Billing	Y	Υ	Ν	Ν	Ν	Y	Y	N	Y	Y	N	Ν	Ν	N	N
DATA	Tabs3 Data Entry	Y	Υ	Ν	Ν	Ν	Y	Y	N	N	N	N	Ν	N	Y	N
PMDATA	Limited PracticeMaster usage	N	Υ	Ν	Ν	Ν	Y	Y	N	N	N	N	Ν	Ν	N	N
PMONLY	PM only	N	Υ	Ν	Ν	Ν	Y	Y	N	N	N	N	Ν	Ν	N	N
SUPERVIS	Supervisor Access	Y	Y	Y	Υ	Υ	Y	Y	N	Y	Y	N	Ν	Ν	N	Ν

Date: 11/28/2	2018																A	cces	s Profi	le List	t																		Pag	e: 1
Assess ID	Nama								T 9	Sof Ac	ftware cess			\$ 	System	Confi Acces	iguratio is	on	Firm	A -1		1.00			Indatas	Pe	ak IIn		Destar											
SUPERVIS	Supervi	sor Ac	cess						Y	Y	Y	Y Y	<u> </u>	Y	Y	p	N	PCL	Y	Y	····	N	N		N	Ва	N	<u>!</u>	N	-										
$ \begin{array}{cccccccccccccccccccccccccccccccccccc$	$\begin{array}{cccc} 3 & 4 \\ \hline Y & \overline{Y} \\ Y & Y \\$	5 Y Y Y Y Y Y	6 Y Y Y	7 8 Y Y Y Y Y Y	9 7 7 7	Tabs 10 Y Y	s3 Ac	12 Y Y	Righ 13 Y	ts 14 1 Y	15 <u>1</u> Y	6 <u>17</u> Y Y	<u>18</u> Y	<u>19</u> Y	<u>20</u> 2 Y	<u>1 2:</u> Y	2 <u>23</u> YY	24 Y																						
6) Y Y 8) Y Y 9) Y Y 10) Y Y 11) Y Y 12) Y Y 13) Y Y 14) Y Y	Y Y Y Y Y Y Y Y Y Y Y Y Y Y Y Y	Y Y Y Y Y Y	Y Y Y Y Y Y Y	Y Y Y Y Y Y Y Y Y Y Y Y N	Y Y Y Y Y Y	Y Y Y Y Y	Y Y Y Y	Y Y Y Y	Y Y Y	Y	Y		Ţ	1																										
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$ \begin{array}{cccccccccccccccccccccccccccccccccccc$	$\begin{array}{cccc} 3 & 4 \\ \overline{Y} & \overline{Y} \\ Y \end{array}$	5 Y N N	6 Y N	7 8 7 7 7 7	9 7 7	<u>10</u> Y	$\frac{11}{Y}$	$\frac{12}{Y}$	13 Y	14 1 Y	15 <u>1</u> Y	6 17 Y Y	18 Y	19 Y	20 Y	1 21 Y	2 23 Y Y	24 Y	25 2 Y	$\frac{16}{Y} \frac{27}{Y}$	28 Y	29 <u>30</u> Y Y	31 Y	32 Y	33 34 Y Y	35 Y	36 3 Y	17 3 Y	18 39 Y Y	40 Y	$\frac{41}{Y}$	42 Y	13 4 Y	14 4 Y	15 4 Y	16 4 Y	17 4 Y	8 49 Y 1	9 50 7 Y	;
7) N N 8) Y Y 9) Y Y	Y N Y N Y Y	N Y Y	N Y N I	Y Y N	'N	Y	Y	Y	Y	Y	Y	ΥY	Y	Y	Y	Ϋ́	ΥY																							
$\begin{array}{cccc} & 1 & 2 \\ 1) & \overline{Y} & \overline{Y} \\ 2) & Y & Y \\ 3) & Y & Y \end{array}$	$\begin{array}{c} GLS \\ 3 \\ \overline{Y} \\ \overline{Y} \\ Y \\ Y \\ Y \end{array}$	S Acce	ss Ri 6 7 Y	ghts 7 8	9	<u>10</u>	<u>11</u>	<u>12</u>																																
4) Y Y 5) Y Y 6) Y Y	Y Y Y Y Y Y	Y Y Y	Y Y Y	Y Y Y Y	Y Y Y	Y N	Y	Y																																
$\begin{array}{cccc} 1 & 2\\ 1) & \overline{Y} & \overline{Y}\\ 2) & Y & Y\\ 3) & Y & Y \end{array}$	$ \begin{array}{c} TAS Act \hline \hline 3 4 \\ \overline{Y} \overline{Y} \overline{Y} \\ Y Y \\ Y Y \end{array} $	Cess R 5 7 Y	ights 6 Y Y	7 8 7 7 7 7	9	<u>10</u>																																		
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1 2 1) Y Y 2) Y Y 3) Y Y	$\begin{array}{c} APS \\ 3 \hline 4 \\ \hline 7 \hline 7 \\ Y \end{array}$	5 Acce	ss Ri 6 -	ghts 7 8	9	<u>10</u>	<u>11</u>	<u>12</u>																																
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Date: 11/28/2018		Access Profi	le List		Page: 1
	Software Access	System Configuration Access			
Access ID Name SUPERVIS Supervisor Access	$\frac{T3}{Y} \frac{PM}{Y} \frac{GL}{Y} \frac{TR}{Y} \frac{AP}{Y}$	$\frac{\text{User}}{Y} \frac{\text{Group}}{Y} \frac{\text{Connect}}{N} \frac{\text{Firm}}{Y}$	Active Log Off SQL Updates Y N N N N	Back Up Restore	
$\begin{array}{c ccccccccccccccccccccccccccccccccccc$					
1) Trust Account Information 1) Browse Trust Accounts 2) Add Trust Accounts 3) Change Trust Accounts 4) Delete Trust Accounts 5) Browse Contact 6) Add Contact 7) Change Contact 8) Delete Contact 8) Delete Contact					
 Trust Transaction Information Browse Trust Transactions Add Trust Transactions Shange Trust Transactions Delete Trust Transactions 					
3) Attorney, Payee & Bank Account Information 1) Edit Attorney 2) Browse Attorney 3) Edit Payee 4) Browse Payee 5) Edit Bank Account 6) Browse Bank Account					
 Checks 1) Print Checks 2) Check Register by Check Number 3) Check Register by Payee 4) Check Register by Trust Account 5) Void Checks 6) Reconciliation 					
5) Reports • 1) Client Trust Ledger 2) Credit Card Authorization List • 3) Attorney List • 4) Bank Account List • 5) Payee List • 6) Trust Account List • 7) Voided Check List • 8) 1099 Report • 9) 1099 Forms • 10) Create APS 1099 Merge File					
6) Maintenance 1) Import Transactions 2) Change Key Type 3) Renumber Trust Account 4) Renumber Attorney 5) Rename Payee 6) Rename Contact					
 7) Utilities/View 1) TAS Customization 2) Data File Integrity Check 3) Reindex Files 4) View Active User List 5) View TAS Support Log 6) SQL Access to Data Files 					

Menu

Reports | Access Profile List

The Access Profile List shows the access profiles that have been defined using the Access Profile program and the access rights that have been assigned to each access profile. You can optionally include the access rights for individual systems—either detail or summary. You can also specify which system's access rights you want included.

When including access rights for individual systems, a grid is shown for each system the profile has access rights to, indicating the functions that can be accessed by the members of the access profile. The numbers down the left side of the grid correspond to the detail groups of menu options shown on the detail Access Profile List. The numbers across the top correspond to the specific function that can be accessed. The difference between an Access Profile List with summary access rights and one with detail access rights is that a list with detail access rights includes a complete listing of the names of each function on the list.

You must be a manager to print this report.

Note: A complete listing of the detail access rights for all systems can be found in Knowledge Base article **<u>R11652</u>** "Access Rights" (support.Tabs3.com).

Definitions	
Date	The date the list was printed.
Access ID & Name	The 8-character Access Profile ID and Description.
Software Access–T3, PM, GL, TR, AP	Indicates whether members of the access profile will have access to the specific software programs. T3 = Tabs3, PM = PracticeMaster, GL = General Ledger Software, TR = Trust Accounting Software and AP = Accounts Payable Software.
System Configuration Access–User, Firm, Group, Active	Indicates whether members of the group will have access to the User Configuration, Firm Information, Group Information, and Active User List programs in System Configuration

Definitions

Exchange Connector Test Report

Date: 10/2	0/2018		Exchange Connector Test Report Page: 1 Jensen, Martin & Anderson, P.C.
Exchange S Administra	erver Name: ma tive User Name	ilserver : PMExchConnect	cor@firm.local
Log On: Su	lccessful		
The Exchar folders. F	ge Connector st eview the follo	uccessfully cor owing results.	nnected to the Exchange Server, but encountered errors while trying to access certain
User ID	Folder	Туре	Result
JAMES JAMES JAMES JAMES JAMES JAMES JAMES JAMES	Events Events Tasks Tasks Tasks Contacts Contacts Contacts	Create Edit Delete Create Edit Delete Create Edit Delete	Successful Successful Successful Successful Successful Successful Cannot find Outlook folder. Verify this user has logged in to PracticeMaster. Unable to test due to add failure Unable to test due to add failure
SALLY SALLY SALLY SALLY SALLY Additional	Events Tasks Contacts Contacts Contacts . Resource: Know	Create Create Edit Delete wledge Base Art	Not configured for automatic synchronization Not configured for automatic synchronization Successful Successful Successful

The Exchange Connector Test Report is generated when the Test Server or Test Permissions buttons are clicked in the Microsoft Exchange Integration window (System Configuration | Settings | Microsoft Exchange Integration).

During the test, the Exchange Connector will attempt to connect to the Exchange server. If the Exchange Connector is unable to connect, the Exchange Connector Test Report will print with an error indicating the problem. If the Exchange Server Name, Administrative User Name, and Administrative Password are all correct and the connection is successful, the Exchange Connector will attempt to create, edit, and delete a record in each folder a PracticeMaster user has configured for automatic synchronization. The results of this test will be noted on the Exchange Connector Test Report.

Definitions User ID Indicates the user record whose Exchange folders are being tested. Folder Indicates the folder type being tested (i.e., Events, Tasks, or Contacts). Indicates the type of action being tested (i.e., Add, Edit, or Delete). Type

Result

Indicates the result of the test. See Knowledge Base Article **R11597**, "Troubleshooting the PracticeMaster Platinum Exchange Connector" for a list of possible results and solutions.

Tabs3 Connect Log

Date: 10/20/2018	Tabs3 Connect Log Jensen, Martin & Anderson, P.C.	Page: 1
10/29/2018 06:09:08	T3Connect.exe stopped	
10/29/2018 06:10:56	T3Connect.exe starting	
10/29/2018 06:11:00	T3Connect.exe successfully connected to www.tabs3connect.com	

Menu

View | Log Files | Tabs3 Connect Log

The Tabs3 Connect Log is a detailed log file used for reviewing chronological Tabs3 Connect activity and troubleshooting connection issues. This log is accessed by clicking the **View Log** button in the Tabs3 Connect Administration window (*Platinum Tabs3 Connect Administration*) in System Configuration or by selecting *View | Log Files | Tabs3 Connect Log* in System Configuration.

More information on the Tabs3 Connect Log can be found in Knowledge Base Article **R11762**, "Troubleshooting Tabs3 Connect".

Tabs3 Connect Access Log

Date: 10/20/2018 Tabs3 Connect Access Log Jensen, Martin & Anderson, P.C.						Page: 1
Date	Time	User ID	Event	IP Address	Information	
10/28/2018	11:27:08	JAMES	Log Out	89.57.32.145		
10/28/2018	10:13:17	JAMES	Download	89.57.32.143	\\Server\Tabs3\CMSystem\Docs\Fee Agreement.doc	
10/28/2018	10:55:28	JAMES	Log In	89.57.32.143	, ,	

Menu

View | Log Files | Tabs3 Connect Access Log

The Tabs3 Connect Access Log tracks Tabs3 Connect access by individual users and allows you to filter the information shown by selecting specific users, events, and a date range. Each time a user logs in, logs out, is locked out of Tabs3 Connect (due to five failed login attempts), or downloads a document or email attachment, an entry is written to the Tabs3 Connect Access Log.

Note: If you are attempting to troubleshoot a connection problem with Tabs3 Connect, use the Tabs3 Connect Log instead because it provides detailed error messages for connection failures and other errors.