

System Configuration Report Pack



Tabs3 Billing



PracticeMaster



Trust Accounting



Accounts Payable




General Ledger

System Configuration Report Pack

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Access ID	Name	Software Access					System Configuration Access												
		T3	PM	GL	TR	AP	User	Group	Connect	Firm	Active	Log Off	Updates	Dict Words	Dict Opt	SQL	Back Up	Restore	Portal
SUPERVIS	Supervisor Access	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	N	N	Y	Y	N	N	N	Y

	Trust Access Rights										
	1	2	3	4	5	6	7	8	9	10	11
1)	Y	Y	Y	Y	Y	Y	Y	Y			
2)	Y	Y	Y	Y							
3)	Y	Y	Y	Y	Y	Y					
4)	Y	Y	Y	Y	Y	Y	Y				
5)	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y
6)	Y	Y	Y	Y	Y	Y					
7)	Y	Y	Y	Y	Y	N					

- 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
- 2) Trust Account Information
 - * 1) Browse Trust Transactions
 - * 2) Add Trust Transactions
 - * 3) Change Trust Transactions
 - * 4) 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
- 4) Checks
 - * 1) Print Checks
 - * 2) Check Register by Check Number
 - * 3) Check Register by Payee
 - * 4) Check Register by Trust Account
 - * 5) Positive Pay Export
 - * 6) Void Checks
 - * 7) 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) Print 1099 Forms
 - * 10) Create APS 1099 Merge File
 - * 11) Tabs3 1099 E-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. Enabled functions are indicated by an asterisk (*) next to the name.

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 [R11652](#) "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

Client Portal Access Log

Date: 08/23/2023	Client Portal Access Log Jensen, Martin & Anderson, P.C.	Page: 1
08/23/2023 09:09:08	pfranklin@petersoninsurance.com attempted login failed due to invalid password	
08/23/2023 09:10:56	pfranklin@petersoninsurance.com logged in	
08/23/2023 09:17:35	pfranklin@petersoninsurance.com session expired	
08/23/2023 09:35:27	pfranklin@petersoninsurance.com logged in	
08/23/2023 09:42:16	pfranklin@petersoninsurance.com logged out	

Menu [View | Log Files | Client Portal Access Log](#)

The Client Portal Access Log is a detailed log that file tracks the date, time, and email address for the following Client Portal events:

- Logins
- Login failures (the user attempted to log in with a registered email address and an incorrect password)
- Logouts
- Expired sessions (the session timed out due to inactivity)

Client Portal Communications Report

Date: 08/23/2023	Client Portal Communications Report Jensen, Martin & Anderson, P.C.			Page: 1
Last Status Update	Sent To	Status	Subject	
08/25/2023 09:36:05 AM	sberg@benningtonmorris.com	Success	Client Portal Account - Client Added	
08/24/2023 03:22:47 PM	pfranklin@petersoninsurance.com	Success	Client Portal Account Creation	
08/24/2023 01:17:22 PM	sberg@benningtonmorris.com	Success	Client Portal Account Creation	
08/24/2023 12:19:05 PM	sueberg@benningtonmorris.com	Failure	Client Portal Account Creation	

The Client Portal Communications Report shows a list of Client Portal invitation emails sent. The Client Portal allows clients to access their current balance and pay their bills via Tabs3Pay. You must be a manager to print this report.

Definitions

Last Status Update	The date and time the email was sent or the failure message was received.
Sent To	The email address to which the invitation was sent.
Status	“Success” = the email was sent successfully, “Pending” = the email is in the process of being sent (may occur when the receiving email server is busy), or “Failure” = the email could not be sent (verify the email address and try sending again later).
Subject	The Subject line of the email. “Client Portal Account Creation” = an invitation sent to a contact who doesn’t currently have access to the Client Portal. Client Portal Account - Client added = an email notifying an existing Client Portal user that they have access to a new matter.

Exchange Connector Test Report

Date: 08/25/2023	Exchange Connector Test Report		
Page: 1	Jensen, Martin & Anderson, P.C.		
Exchange Server Name: mailserver			
Administrative User Name: PMExchConnector@firm.local			
Log On: Successful			
The Exchange Connector successfully connected to the Exchange Server, but encountered errors while trying to access certain folders. Review the following results.			

User ID	Folder	Type	Result

JAMES	Events	Create	Successful
JAMES	Events	Edit	Successful
JAMES	Events	Delete	Successful
JAMES	Tasks	Create	Successful
JAMES	Tasks	Edit	Successful
JAMES	Tasks	Delete	Successful
JAMES	Contacts	Create	Cannot find Outlook folder. Verify this user has logged in to PracticeMaster.
JAMES	Contacts	Edit	Unable to test due to add failure
JAMES	Contacts	Delete	Unable to test due to add failure

SALLY	Events	Create	Not configured for automatic synchronization
SALLY	Tasks	Create	Not configured for automatic synchronization
SALLY	Contacts	Create	Successful
SALLY	Contacts	Edit	Successful
SALLY	Contacts	Delete	Successful

Additional Resource: Knowledge Base Article R11597			

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).
Type	Indicates the type of action being tested (i.e., Add, Edit, or Delete).
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.

Group List

Date: 08/23/2023		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	CHERYL DAN JASON JEN JPP KENDRA	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.

Tabs3 Connect Log

Date: 08/23/2023	Tabs3 Connect Log Jensen, Martin & Anderson, P.C.	Page: 1
08/24/2023 06:09:08	T3Connect.exe stopped	
08/24/2023 06:10:56	T3Connect.exe starting	
08/24/2023 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: 08/23/2023	Tabs3 Connect Access Log Jensen, Martin & Anderson, P.C.				Page: 1
<u>Date</u>	<u>Time</u>	<u>User ID</u>	<u>Event</u>	<u>IP Address</u>	<u>Information</u>
08/23/2023	11:27:08	JAMES	Log Out	89.57.32.145	
08/23/2023	10:13:17	JAMES	Download	89.57.32.143	\\Server\Tabs3\CMSystem\Docs\Fee Agreement.doc
08/23/2023	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.

User List

Date: 08/23/2023		User List				Page: 1				
User ID	User Name Email Address	Verification ID	Logon User	Tab3 Connect	Access 1	Access 2	Access 3	Access 4	Access 5	
					Calendar Access Rights					
ALICE	Alice M. Thompson athompson@jensenmartinlaw.com	0019	Yes	No	MANAGER KENDRA MLJ PAM RON UNASSIGN	Edit public Edit public Edit public Edit public		Browse Private		
CATHY	Cathleen Trudore OfficeMgr@jensenmartinlaw.com	0020	Yes	Yes	MANAGER					
CHERYL	Cheryl Bradley cbradley@jensenmartinlaw.com	0008	Yes	Yes	APGL	BILLING	DATA	PMDATA		
DAN	Daniel H. Brady	0021	Yes	No	APGL	BILLING	SUPERVIS			
JASON	Jason I. Masterson jmasterson@jensenmartinlaw.com	0022	Yes	Yes	PMDATA					
JEN	Jennifer A. Noonan jen@jensenmartinlaw.com	0023	Yes	No	SUPERVIS					
JPP	Jimmy P. Praum jpp@jensenmartinlaw.com	0024	Yes	Yes	DATA	PMDATA				
KENDRA	Kendra I. Michaels	0025	Yes	Yes	BILLING	PMDATA	PMONLY			
MLJ	Michael L. Jensen mjensen@jensenmartinlaw.com	0026	Yes	No	SUPERVIS					
PAM	Paula Ann Martin PMartin@jensenmartinlaw.com	0027	Yes	Yes	DATA KENDRA MLJ RON UNASSIGN	PMDATA Edit public Edit public Edit public Edit public	PMONLY Browse Private	SUPERVIS Browse Private	Edit Private	
ROBERT	Robert O. Burns Rburns@jensenmartinlaw.com	0028	Yes	Yes	PMDATA					
RON	Ronald P. Anderson	0013	Yes	Yes	MANAGER					
UNASSIGN	Unassigned Court Item	0023	No	No						

Date: 08/23/2023		User List		Page: 1
User ID	User Name Email Address	Verification ID	Logon User	
ALICE	Alice M. Thompson athompson@jensenmartinlaw.com	0019	Yes	
CATHY	Cathleen Trudore OfficeMgr@jensenmartinlaw.com	0020	Yes	
CHERYL	Cheryl Bradley cbradley@jensenmartinlaw.com	0008	Yes	
DAN	Daniel H. Brady	0021	Yes	
JASON	Jason I. Masterson jmasterson@jensenmartinlaw.com	0022	Yes	
JEN	Jennifer A. Noonan jen@jensenmartinlaw.com	0023	Yes	
JPP	Jimmy P. Praum jpp@jensenmartinlaw.com	0024	Yes	
KENDRA	Kendra I. Michaels	0025	Yes	
MLJ	Michael L. Jensen mjensen@jensenmartinlaw.com	0026	Yes	
PAM	Paula Ann Martin PMartin@jensenmartinlaw.com	0027	Yes	
ROBERT	Robert O. Burns Rburns@jensenmartinlaw.com	0028	Yes	
RON	Ronald P. Anderson	0013	Yes	
UNASSIGN	Unassigned Court Item	0023	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 whether the user is configured to access Tabs3 Connect.
 - Include only users who are configured to access Tabs3 Connect.
- 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.
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: <ul style="list-style-type: none"> PracticeMaster Email Notifications Word Document Assembly HotDocs Assembly Tabs3 Connect Login Email Tabs3 Billing Email Templates LexCharge Reports Trust LexCharge Reports
Verification ID	The Verification ID is a four-digit number that is assigned to each user. The Verification ID is used internally.
Tabs3 Connect	A Yes in this column indicates the user is configured to access Tabs3 Connect.
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 11, 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 Billing 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.