Tabs3® PracticeMaster®

System Configuration

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Product Guide

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System Configuration

Version 16.2 Manual

Version 16.2 (September 2012)

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Chapter 1
Introduction & Getting Started

Software Technology, Inc.

Since 1979, Software Technology, Inc. has been developing, selling and supporting top quality financial and practice management software for solos to 50+ timekeeper firms. Our software is backed by our professional staff with extensive experience in accounting, program development and customer support. We are committed to providing our customers with user-proven, reliable software.

System Configuration Overview

The System Configuration program provides configuration information for the following software:

- Tabs3 Time Accounting and Billing Software
- PracticeMaster (PM)
- Tabs3 General Ledger Software (GLS)
- Tabs3 Accounts Payable Software (APS)
- Tabs3 Trust Accounting Software (TAS)
- Tabs3 Connect

Each person who will use Tabs3, PracticeMaster, GLS, APS, or TAS must have a user record defined and that user must be assigned to an access profile. Users and access profiles are set up using the System Configuration software. Passwords are assigned to users and access rights are assigned to access profiles. Personnel changes are extremely easy to maintain because you simply add new users and assign them to an access profile. Old users can be reassigned, deleted, or marked as inactive.

Groups can be defined for use with PracticeMaster's e-mail, eNote, and calendaring features.

The firm's name, address, state, county, phone number, fax number, and Federal ID # are also entered using System Configuration. This information is used on reports and APS/TAS 1099 Forms generated by the software system. These fields can also be used in conjunction with PracticeMaster's document assembly features.

An Active User List can be displayed from System Configuration. This list shows all of the users that are accessing the software along with the computer name, specific program, and function they are using.

Printers can be set up using System Configuration; however, Print Setup is accessible in all of the modules.

System Configuration is provided with Tabs3, PracticeMaster, GLS, APS, and TAS.

Computer Requirements

To use System Configuration, the following system hardware is required:

- Windows 7/Vista/XP.
- 52 MB of free hard disk space.
- Minimum 800 x 600 screen resolution using 96 DPI. Recommended 1024 x 768 or higher.
- 32-bit color is recommended.
- A CD drive for installing the programs onto the hard disk.
- High speed wired network recommended for multi-user versions. Wireless networks are not recommended due to performance and reliability issues.

Conventions Used in this Manual

The term "click" or "clicking" means to select the specified item by clicking the primary mouse button once. The term "double-click" means to select the specified item by clicking the primary mouse button twice. The term "right-click" means to select the specified item by clicking the secondary mouse button once (usually the right mouse button). If desired, the keyboard method can be used to select the specified item. Details regarding keystrokes can be found on page 20.

This manual shows command button labels in **bold face.**

Menu options are shown in ***bold face italics*** type separated by the "pipe" character. For example, ***File* | *Open* | *User*** is shown to indicate the order of the menu options used to access the User program.

Conventions Used in the Program

The software uses a "Multiple Document Interface." This interface allows multiple program windows to be open at the same time. For example, you can have a client window, two fee windows and a cost window open all at the same time. Keep in mind that certain tasks require exclusive use of the software. Additional information regarding these tasks can be found on page 6.

Windows can be repositioned and resized as well as minimized and maximized. However, certain dialog boxes are non-interruptible, thus allowing no other task in the program to be accessed until that dialog box is closed. The sizes and positions of the main application window and lookup windows are retained from session to session for each workstation.

Installing the Software

The software is provided on a CD and must be installed to a hard disk. Detailed installation instructions are provided on the CD.

Network Installation Note: Separate server and workstation installation procedures are required when running the software in a networking environment. These procedures can be found in the installation instructions provided on the CD.

Starting System Configuration

The software can be started via a shortcut icon on the Windows desktop or via the Windows taskbar.

Desktop Shortcut — During installation, if you elected to create icons on the desktop, you can double-click the System Configuration desktop icon.

Windows Taskbar — System Configuration can be started via the Windows taskbar. Click the **Start** button, and then point to **Programs**. Point to the **Tabs3 and PracticeMaster** folder and then click **System Configuration**.

Note: Startup options can be found in Appendix C on page 53.

After starting System Configuration, the Logon dialog box will be displayed.

Logon Dialog Box

The Logon dialog box is used to access the software. It is displayed the first time any system in a given session is started. A valid User ID must be entered as well as the associated password if one has been defined for the user. Users and passwords are defined using the User Configuration program in System Configuration *(page 21)*.

User ID — Enter a User ID as defined in System Configuration.

Password — If a password has been assigned for the user whose User ID was entered, the user will be required to enter the password. The only password that will allow access for the specified User ID is the password defined for that user.

By default, the Logon dialog box is not shown when starting subsequent systems in the same session. For example, if a user starts Tabs3, PracticeMaster and GLS, the Logon dialog box will only be shown when starting the first system. Furthermore, when viewing the Active User List, the user will be shown as having all three systems open.

Note: If for some reason you want to log on as a different user, you can force the Logon dialog box to be displayed for subsequent system startups by holding down the SHIFT key when starting the software. Or, you can use the "/FORCELOGON" startup option when starting the subsequent system *(page 54)*.

Security Note: When System Configuration is first installed, a blank User ID with no password is automatically created and assigned to the Manager access profile. Members of the Manager access profile have access rights to all programs in the software. You can log on to the system using the blank User ID by leaving the User ID and Password fields blank and clicking **OK** in the User/Password dialog box. This blank User ID is available until it is changed or deleted.

After entering the required information, the main application window will be displayed.

Main Application Window

The main application window is the base window that is opened after starting the software. The main application window can be minimized, maximized or resized. The size and position of the main application window is saved for each workstation for subsequent sessions.

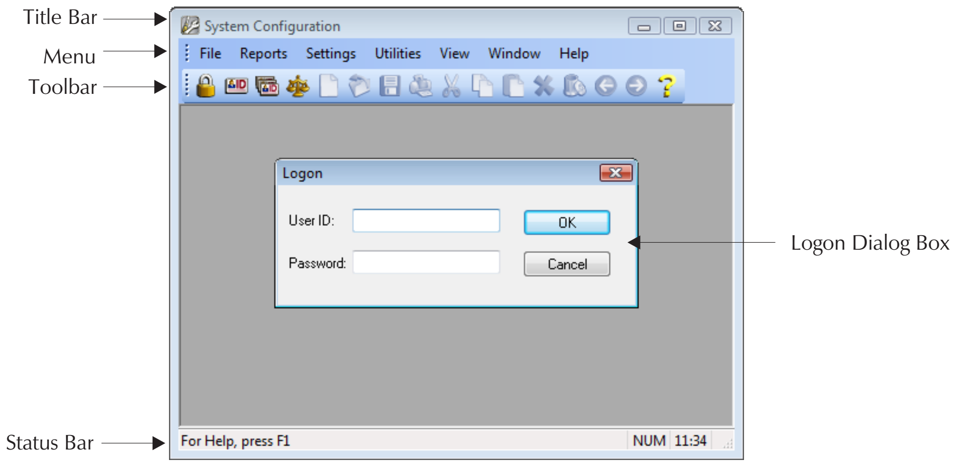


Fig. 1-1, Main Application Window

Toolbar

By default, the toolbar is turned on and is positioned below the menu bar. Complete details regarding the toolbar buttons can be found on page 19.

When the toolbar feature is turned on, a check mark will be displayed to the left of the ***View* | *Toolbar*** menu option. If desired, you can turn the toolbar off or move it elsewhere on the desktop by dragging it. The toolbar status and position is saved for subsequent sessions. *(See **Toolbar** in Help for information regarding how to move the toolbar.)*

Status Bar

The status bar is shown at the bottom of the main application window. Various messages and indicators are shown depending on which system is being used and the status of the system.

The left side of the status bar is used to display descriptions of menu selections and graphical buttons when the mouse pointer is positioned over a menu selection or button. Indicators on the far right of the status bar show whether Caps Lock is on, Num Lock is on and the current system time.

When the status bar is turned on, a check mark will be displayed to the left of the ***View* | *Status Bar*** menu option. If desired, you can turn the status bar off. This information is saved for subsequent sessions.

Open Windows Maximized

When this option is turned on, a check mark will be displayed to the left of the ***View* | *Open Windows Maximized*** menu option. This option determines how the various program windows within the main application window are opened. Select this option if you always want windows opened in a maximized state. Using this option allows only one window at a time to be shown in the main application window.

Turn this option off if you want to view multiple windows in the main application window at the same time. Typically, users with larger monitors and higher resolutions will keep this option turned off. When this option is turned off, new windows will be opened in a "windowed" state, allowing you to reposition them within the main application window and in many cases, resize them as well.

Active User List

The Active User List shows the users who are currently accessing the same software. Managers can optionally view all users in all of the software as well as reset one or more users. The User ID, User Name, and computer name of each user accessing the software is shown. Also shown is the software being accessed along with the task being performed. Before you make a backup or perform a function that requires exclusive control over the data files, the Active User List can be used to determine if any users are accessing the software. An asterisk is shown to the left of the User ID of the user accessing the Active User List.

Detail and **Summary** options determine whether or not individual tasks will be displayed. When **Detail** is selected, each task for every active user will be displayed in a separate row. When **Summary** is selected, a single row for each login user will be displayed per program.

The Active User List also allows you to reset users *(see Resetting Users below)*.

Resetting Users

All users should exit the software properly so that the Active User List is correctly updated. If a user does not exit the software properly, the user must be reset. When the Active User List is accessed by a user who is a Manager, a **Reset** button is displayed. Clicking the **Reset** button will reset the highlighted user(s) *(with the exception of the user who is performing the reset)*. You will be asked to confirm that you want to reset the specified users.

Caution: Users that are in the software should ***never*** be reset. Resetting users that are in the software can cause data loss, data corruption, and fatal errors. ***DO NOT*** reset users unless you are absolutely sure they are not using the software. Users should always exit the software properly. The reset option should only be used when a user is unable to exit the software properly due to a computer problem, such as a lockup or power failure.

Network Caution: Resetting a user resets the user in the software only. If you are running on a network, you may also need to reset the user on the network in order to close files that may have been left open on the network. Therefore, if you are running on a network and have reset a user, make sure the user who was reset does the following: 1) logs off the network; and 2) logs back on the network. Doing this ensures that any files that were left open by the network are closed, thus eliminating potential Fatal Errors in the software.

Single User Note: If a non-manager user is locked out of the software, that same user can restart the software using the same User ID and password. A Duplicate User IDs message will be displayed and the user can simply be reset. However, if any other user (managers included) attempts to access the same system, the “Active user limit has been reached. Access Denied.” error message will be displayed. If the user who was locked out cannot access the software again or is not available, a manager can start the System Configuration program and reset all users via the Active User List.

Note: Information regarding all resets is written to a log file named RESET.LOG. This file includes the system the reset was performed in, the date and time that the system was reset, which user on which computer performed the reset, which user was reset and the system that the reset user was in. The RESET.LOG file can be accessed via the ***View | Log Files | Reset Log*** menus or can be accessed via any text editor such as Microsoft Notepad or WordPad.

Platinum Note: In Platinum versions of the software, resetting a user first attempts to log off the user. If the user cannot be remotely logged off, the user will be reset. Users that are logged off will receive a log off notification, and will be noted in the RESET.LOG and SUPPORT.LOG. This prevents active users from being reset, and thus helps reduce the chance of data loss or errors.

Exiting System Configuration

To exit System Configuration, you can use any of the following methods:

- From the **File** menu, click **Exit**.
- Click the Close button (last button on the right side of the title bar) or double-click the program icon shown on the left side of the title bar.
- Press Alt + F4.

Access Rights

System security is implemented by defining access rights and passwords using the System Configuration program. System security consists of defining user records and access profiles, then assigning one or more access profiles to each user. Access rights are defined for each access profile level whereas passwords are optionally defined for each user. Members of the Manager access profile have access rights to all programs in the software.

In System Configuration, only managers can add users, edit other users, delete users, rename or reassign users, edit access profile assignments for individual users, print reports, reindex files, reset other users, and lock out all users. When using the User Configuration program, only managers can edit the Tabs3 timekeeper assignments.

Network & Multi-User Functionality

The multi-user version of the software allows multiple users to simultaneously perform data entry, generate reports and view information. However, not all functions can be accessed at the same time. This is because different functions require different levels of control over the program's data files. There are five levels of control that a function can have over the data files:

Exclusive — An Exclusive function requires exclusive control of the specific system's data files. Only one user will be allowed to access the program if such a function is invoked. For example, when using the Renumber Timekeepers program in Tabs3, no other users are allowed to access any other Tabs3 program.

Single Access — A Single Access function can only be accessed by one user at a time. Other users can access other functions of the software. For example, when using the Update Statements program in Tabs3, no other users can access the Update Statements program. However, other users will be able to use other Tabs3 functions.

Multi-Access — A Multi-Access function can be accessed by multiple users simultaneously. Also, other Multi-Access functions can be accessed at the same time by other users. A single user can have more than one Multi-Access function open at the same time. For example, when one user is accessing the Fee Entry window in Tabs3, other users can also open a Fee Entry window at the same time.

Function that Prohibits Access to Other Functions — This type of function restricts functions in other programs from being performed. For example, when accessing the Cost File in Tabs3, other users will not be allowed to Renumber GLS Accounts or run the Reindex Files program in GLS.

Super Exclusive — A Super Exclusive function requires exclusive control of all systems' data files. Only one user will be allowed to access the system with a program that requires super exclusive control. For example, when using the Restore Data Files program in System Configuration, no other systems can be open.

Detailed lists of each program's functionality can be found in our Knowledge Base under the keyword "multi-user functionality" *(www.support.Tabs3.com or www.support.PracticeMaster.com).*

A Conflicting Activities window displays information regarding which users and activities are currently preventing a requested task from being started. When this window is displayed, other users will be prevented from starting tasks that would interfere with the one you are currently attempting to start. Detailed information can be found in our Knowledge Base under the keyword "conflicting activities" *(www.support.Tabs3.com)*.

Platinum Note: In Platinum versions of the software, a **Log Off Users** button in the Conflicting Activities window can be used to display a Log Off Users window. This allows you to safely log off each user who is listed in the Conflicting Activities window after a selected amount of time, while notifying them of the reason for them being logged off.

Lock Out All Users

Menu	***File | Lock Out All Users***

The **Lock Out All Users** menu option allows any manager to lock all other users out of the Tabs3 and PracticeMaster software. This feature makes it easier for the manager to perform exclusive tasks.

This menu option is available in all Tabs3 and PracticeMaster software products. Only managers can access this menu option. When this menu option is selected, a Lock Out All Users window will be displayed indicating that you have locked out all users. As long as this window is open, the software is locked. The Active User List can be used to show the manager which users are still in the software.

When the software is locked, all other users will be prevented from starting any other Tabs3 or PracticeMaster software product. Users who are already using the software will be allowed to finish their current tasks but cannot start any new tasks. For example, if a Tabs3 user is adding fee transactions when a manager locks out all users, the Tabs3 user will be allowed to continue using the Fee data entry program but cannot use any other task in Tabs3 and will be locked out of the software after exiting the Fee program.

The **Unlock** button can be used to close the Lock Out All Users window thus unlocking the software and allowing other users normal access to all Tabs3 and PracticeMaster software products. Alternatively, the manager can close the Lock Out All Users window or exit the software in which the lock was implemented to unlock the software.

Initial File Setup

Set up the following files before allowing users to access the programs:

Firm Information

Menu	***File | Open | Firm***
Data Entry Details	Page 25

Access Profiles

Menu	***File | Open | Access Profiles***
Data Entry Details	Page 23
Sample Report	Page 60

User File

Menu	***File* | *Open* | *Users***
Data Entry Details	Page 21
Sample Report	Page 58

Group File

Menu	***File* | *Open* | *Groups***
Data Entry Details	Page 24
Sample Report	Page 59

Verification of Initial File Setup

After the initial files have been created, the information entered should be verified for accuracy.

Firm Information

File* | *Open* | *Firm
Open the Firm file and verify the information shown on the screen.

Access Profile File

Reports* | *Access Profile List
Print a Detail Access Profile List including individual systems and verify the information.

Group File

Reports* | *Group List
Print a Group List and verify the information.

User File

Reports* | *User List
Print a User List with all options selected and verify the information.

Help Menu

The Help Menu consists of the following menu selections:

Help Topics

The **Help Topics** menu selection displays the Help Topics window.

What's New

Selecting the **What's New** menu option will open your default Internet browser to the What's New page on our Web site, allowing you to view or download the What's New List for the current software version.

Internet Resources

The **Internet Resources** menu consists of the following menu selections:

Web Site

Our Web site can be found on the Internet at:
www.Tabs3.com *or* ***www.PracticeMaster.com***

Selecting the **Web Site** menu option will open your default Internet browser to the above Web page.

Knowledge Base

The Knowledge Base includes information regarding Tabs3 and PracticeMaster software products and is provided for resellers, consultants, end-users and other third parties who work with

Tabs3 and PracticeMaster software. It contains extensive information on Error Troubleshooting, Networking & Windows Issues, "How To" articles and product-related articles. The Knowledge Base requires Internet access and can be found on the Internet at

www.support.Tabs3.com *or*
www.support.PracticeMaster.com

Selecting the **Knowledge Base** menu option will open your default Internet browser to the above Web page.

Register Software

The Register Software menu option opens your default Internet browser to the software registration page on our Web site. This page provides a form that allows you to register your software license online and can be accessed at:

www.Tabs3.com/register

Error Submission Configuration

Tabs3 and PracticeMaster software has an automatic error reporting feature. Error reporting helps us track and address errors in order to improve system quality, reliability, and performance. When you send an error report over the Internet, you provide technical information that is used to enhance future versions of the product. This data is used for quality control purposes only and is not used for tracking individual firms, users, or installations for any marketing purpose. This menu option allows you to enable or disable automatic error reporting.

Submit Log Files

You can use the **Submit Log Files** menu option to provide log file information to Technical Support for troubleshooting purposes via the Internet. You will be required to enter an Incident ID before submitting information. Incident IDs are provided by a Technical Support Representative.

Diagnostics

The **Diagnostics** menu consists of the following menu selections:

Network Test

The Network Test diagnostic utility *(page 16)* tests basic network reliability for the current workstation.

Network Settings

The Network Settings utility *(page 17)* allows the firm to configure network settings for the current workstation.

About System Config

The **About System Config** menu selection displays pertinent information about System Configuration including the version number, User ID, current working directory, release date, program directory, firm name, whether the user has manager rights, and other systems that have been installed. The serial number for each installed system is shown as well as the active user limits.

The lower portion of the window includes information about the workstation including the total amount of computer memory, available physical memory, amount of free disk space, type of processor, Windows Version, Windows Directory, Internet Explorer version, screen resolution, color quality, redirector information, display driver information, and printer driver information.

The **Print** button displays a Print dialog box, allowing you to print a report of the information shown in the About System Configuration window *(page 48)*

A detailed list of the information located in the About System Config window can be found in Knowledge Base Article R11385, "Information in the Help | About Window" *(www.support.tabs3.com)*.

License Notice

The License Notice is a reminder that the software is protected by federal copyright law and is provided based on the provisions of a License Agreement that restrict usage and distribution of the software. The most current License Agreement can be found in our Knowledge Base Article R10348, “Software License Agreements.”

Log Files

The following log files are maintained in the software for troubleshooting purposes and can be accessed via the **View** menu by pointing to the **Log Files** menu option.

Support Log

The Support Log tracks various activities performed in the software.

Error Log

The Error Log tracks information on any errors that may have occurred while using the software.

Reset Log

The Reset Log tracks information regarding when users are reset using the Active User List program.

Tabs3 Connect Log

The Tabs3 Connect Log tracks administrative information and configuration history for troubleshooting purposes.

Tabs3 Connect Access Log

The Tabs3 Connect Access Log tracks all log in and log out sessions by users as well as file downloads and lock outs, thus providing a history of all Tabs3 Connect sessions.

Backing Up

To guard against loss of data, backup copies of your data should be made and stored in a safe location. It is your responsibility to establish adequate and frequent backup procedures. Your reseller or computer dealer can assist you with this task.

In addition to your regularly scheduled backups, there are a few programs in System Configuration that caution you to back up your data files. A temporary backup should be made prior to running one of these programs in the event the program is aborted abnormally (i.e., power failure, network problems, General Protection Faults, etc.). Do not ignore these warnings. These programs are:

- Reindex Files
- Reassign User ID
- Rename User ID

Caution: Run the Data File Integrity Check program for all programs before backing up. This will ensure that the data being backed up is valid data.

Back Up Data Files

Menu Selections

File | Back Up Data Files

Purpose

To make a temporary backup of the data files before running a program where you are cautioned to make a temporary backup.

Caution: This backup procedure is a temporary backup and is not intended to replace your regular backup procedures. It is important to make sure that regular monthly backups are kept off site in case of hardware failure, theft, flood, etc. Keep in mind that every time this program is run, the previous backup is overwritten.

Note: All System Configuration, Tabs3, PracticeMaster, GLS, APS, and TAS data files are backed up when the Back Up Data Files program is run.

For your reference, the date and time of the last backup file, the User ID used to create the backup file, the type of backup, and the description entered for the prior backup are displayed in the window. You can enter a new description or accept the default description. For complete information, refer to "Back Up Data Files" in Help.

Restore Data Files

Menu Selections ***File | Restore Data Files***

Purpose To restore one of three prior backups made using the Back Up Data Files program.

Caution: Restoring data files will overwrite your current data files. If you restore data files, run a Data File Integrity Check for all programs immediately after restoring to verify there are no errors.

Note: Restoring data files will restore ***ALL*** System Configuration, Tabs3, PracticeMaster, GLS, APS, and TAS data files. Any tasks performed in any Tabs3 & PracticeMaster software since the backup file was created will need to be redone.

You can select the backup you want to restore. For your reference, the date and time of the last backup file, the User ID used to create the backup file, the type of backup, and the description that was entered for the selected backup will be displayed in the window. For complete information, refer to "Restore Data Files" in Help.

HotBackup and Restore HotBackup

Menu Selections ***File | HotBackup***
File | Restore HotBackup

Purpose To make a temporary backup of all data files before running a program where you are cautioned to make a temporary backup.

The **HotBackup** and **Restore HotBackup** features are available only in the Platinum version of the software. When using the Platinum version of the software, the **HotBackup** and **Restore HotBackup** menu options replace the **Back Up Data Files** and **Restore Data Files** menu options. HotBackup allows you to create backups while other users are using the software, schedule automatic recurring backups, configure how many HotBackups you want to keep and where to keep them, and lets you send optional e-mail notifications to designated e-mail recipients when a HotBackup completes (or fails). Additional details on HotBackup can be found in the Help provided with the software.

System Configuration Data Files

A detailed list of the data files can be found in Knowledge Base article R11352, "Version 16 Data File Names" *(www.support.Tabs3.com)*.

Platinum Version

Tabs3 and PracticeMaster Platinum are the top of the line products offered by Software Technology, Inc. These programs utilize state of the art database technology to ensure the fastest performance and lowest network impact possible. They also include advanced reporting options, administrative tools, and mobile access to your Tabs3 and PracticeMaster data. Auto-Recovery, HotBackup, Accelerators, and the Log Off Users features all work together to enhance the overall usability, performance, and reliability of the software. Tabs3 Connect provides access to Tabs3 and PracticeMaster anywhere you can connect to the internet. PracticeMaster Platinum also includes eNote, an intra-office messaging feature, and an Exchange Connector, which allows you to synchronize PracticeMaster calendars and contacts with Outlook via Microsoft Exchange without logging into PracticeMaster. As your firm grows, Platinum will scale with you, limiting degradation in performance caused by processing increasing amounts of data. Some of Platinum's key benefits include:

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 also designed to protect attorneys' sensitive information. The information you access using Tabs3 Connect is secure because it resides at your office, on your computers. 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.
- Access the PracticeMaster Matter Manager for case information.
- 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.

More detailed information on Tabs3 Connect can be found in Knowledge Base Article R11480 - "All About Tabs3 Connect."

HotBackup

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

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 Knowledge Base Article R11175 - "Transaction Processing."

Tabs3 & 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 Knowledge Base Article R11182 - "Tabs3 and PracticeMaster Accelerators."

Accelerated Filtering & Column Sorting

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

PracticeMaster eNote

The eNote intra-office communication feature is available in PracticeMaster Platinum. eNotes blend the best features of e-mail and instant messaging to provide a remarkably easy to use tool that streamlines communication, facilitates workflow between users, retains records for accountability purposes, and 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.

Exchange Connector

The PracticeMaster Exchange Connector provides a direct link between the Platinum Server and a Microsoft Exchange server. This allows calendar and contact information to be synchronized directly between the servers, rather than via each user's copy of Microsoft Outlook. Additional information regarding the Exchange Connector feature can be found in the Outlook Integration Guide, which is installed with the software and can also be accessed via our Knowledge Base in Article R11400 - "Outlook Integration Guide." Detailed instructions for configuring the Exchange Connector are available via Knowledge Base Article R11427 - "Configuring the PracticeMaster Platinum Exchange Connector."

Lockout Notification / Log Off Users

The Conflicting Activities window includes a Notify button that informs logged in users that a lockout has been initiated. Clicking the **Notify** button immediately sends a message to all logged in users requesting that they exit the software (or return to the Task Folders) so that the exclusive task can be started. The Conflicting Activities window also includes a Log Off Users button. This function allows you safely log off all users after a specified time interval. When you initiate the **Log Off Users** process, all users will be notified that they will be logged out of the software when the displayed countdown ends, along with the reason they are being logged off. The **Notify** and **Log Off Users** features are only available in the Platinum version of the software.

Tabs3 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.

Tabs3
Enhanced Detail Accounts Receivable Report

The Detail Accounts Receivable Report now offers the option to include a break down 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.

For more information on the Platinum version of the software, contact the reseller from which you purchased the software or our Sales Department at (402) 419-2200. Additional information can be found in the Platinum Server manual or Knowledge Base Article R11379, "Platinum Software Overview" *(www.support.Tabs3.com)*.

Outgoing E-mail Configuration

Menu Selections

Settings | Outgoing E-mail Configuration

Help

Outgoing E-mail Configuration

Purpose

The Outgoing E-mail Configuration window is used to configure e-mail settings for e-mailing Tabs3 statements, HotBackup Notifications, and the Test E-mail function in the Tabs3 Connect Administration window. A setting on the **Main** tab of Tabs3 Customization determines whether e-mail statements are sent via Outlook or an SMTP server.

Benefit

This setup allows you to send statements directly via e-mail without leaving the Tabs3 software. Additionally, if you are running Platinum versions of the software, setting up SMTP configuration allows you to set up HotBackup Notifications. These notifications inform you regarding the status of your HotBackups so that you do not have to check the log files unless there is an issue.

Frequency

Once. Edit only if your SMTP Server settings change.

Microsoft Exchange Integration

Menu Selections

Settings | Microsoft Exchange Integration

Help

Exchange

Purpose

This window allows you to enable Microsoft Exchange integration as well as the PracticeMaster Exchange Connector for Outlook calendar and contact integration with PracticeMaster.

Benefit

With Microsoft Exchange Integration enabled, events and tasks entered for other users in PracticeMaster are synchronized to Outlook immediately instead of waiting for the next manual or periodic synchronization to occur. Additionally, contacts saved to shared folders on the Exchange server are updated for all users who access those folders.

The **PracticeMaster Exchange Connector** is a Platinum-only feature that provides a direct connection between the Platinum Server and the Microsoft Exchange Server. This allows synchronization changes to be sent directly between the servers, rather than processed via Microsoft Outlook.

Frequency	Once. Edit only if your Microsoft Exchange server settings change.

Note: Refer to Knowledge Base Article R11400, “Outlook Integration Guide,” for detailed instructions regarding setting up integration between PracticeMaster and Microsoft Outlook.

Reindex Files

Menu Selections	***Utilities* | *Reindex Files***
Help	***Reindex Files***
Purpose	The Reindex Files program is a utility program that can be used to rebuild System Configuration’s index files. The index files are used by System Configuration to locate the position of specific records within a data file. The Reindex Files program deletes and rebuilds index files for selected files. This program is typically used only when problems occur. If the System Configuration program detects a problem with one of its data files, a message will be displayed instructing you to run the program. Only managers can run this program.
Benefit	The ability to recreate index files gives you the capability of salvaging data if the index data files (i.e., *.IDX) are missing or become corrupted due to hardware failure.
Frequency	As needed.

Caution: Make a backup before running this program. If this program is interrupted for any reason, it may be necessary to restore your data files and rerun this program. You will be given the opportunity to make a backup immediately after selecting this program.

Rename User ID

Menu Selections	***Utilities* | *Rename User ID***
Help	***Rename User ID***
Purpose	The Rename User ID program is used to change a User ID to another new User ID in all systems. This program is commonly used when a user’s name changes due to marriage, divorce, etc. This program is a super exclusive task and requires that no other users access the software while it is being performed.
Frequency	As needed.

Caution: It is important to back up the data in ***ALL*** systems prior to running this program. If this program is interrupted for any reason, it will be necessary to restore your data files and rerun this program. You will be given the opportunity to make a backup immediately after selecting this program.

Reassign User ID

Menu Selections	***Utilities* | *Reassign User ID***
Help	***Reassign User ID***

Purpose The Reassign User ID program is used to combine all records associated with a User ID to an existing User ID in all systems. This program is most commonly used when an employee leaves the firm. This program is a super exclusive task and requires that no other users access the software while it is being performed.

Frequency As needed.

Caution: It is important to back up the data in ***ALL*** systems prior to running this program. If this program is interrupted for any reason, it will be necessary to restore your data files and rerun this program. You will be given the opportunity to make a backup immediately after selecting this program.

Initialize SQL

Platinum

Menu Selections ***Platinum | Initialize SQL***
Platinum | Initialize SQL Profiles

Help ***Initialize SQL***

Purpose Provides links between the Platinum SQL database and the Tabs3 and PracticeMaster software data files.

More Information Refer to the Platinum Server Manual, Chapter 4: Operating Platinum SQL Server.

Frequency As needed. Initially before accessing the Platinum SQL database; after adding new areas of practice, files, or fields in PracticeMaster; after adding new GLS clients; or when updating to a new version.

Tabs3 Connect Administration

Platinum

Menu Selections ***Platinum | Tabs3 Connect Administration***

Help ***Tabs3 Connect Administration window***

Purpose The Tabs3 Connect Administration window allows managers to configure whether your database will be available for access using Tabs3 Connect.

Diagnostic Utilities

The network diagnostic utilities can be found in the Diagnostics group of the Help menu, and include programs to help configure network settings and test for basic network reliability on the local workstation. These utilities should only be used when directed by a network technician or Technical Support representative.

Network Test

Menu Selections ***Help | Diagnostics | Network Test***

Help **Network Test**

Purpose

The Network Test program is designed to test for basic network reliability (i.e., reading and writing across the network) as well as provide a basic idea of read/write speed. It is recommended that the Network Test be run if the firm experiences network-related issues to help determine whether a hardware issue exists. This test will help determine your network's reliability. However, this is not a conclusive test, and other tests may need to be run.

Note: At minimum, two workstations must select to start the Network Test before the test will begin. The test will more accurately assess your network as more computers join the test. Starting the Network Test will generate a significant amount of network traffic; therefore, we do not recommend running this test during peak working hours of the day.

Network Settings

Menu Selections

Help* | *Diagnostics* | *Network Settings

Help

Network Settings

Purpose

This window is designed to check current network settings, as well as allow the firm to configure network settings for the current workstation.

Caution: This program is used to make registry changes to the local workstation. Do not change network settings unless you have consulted with a network administrator. Improperly configuring your Network Settings might have detrimental effects, including speed issues, fatal errors, and possible data corruption.

Note: Only managers can apply changes in the Network Settings window. All other users can open the Network Settings window and view the current settings, but cannot apply changes.

System Configuration Menu Bar

File
- Open
  - Access Profile
  - Users
  - Group
  - Firm
- Back Up Data Files / HotBackup
- Restore Data Files / Restore HotBackup
- Print Setup
- Lock Out All Users
- Exit

Reports
- Access Profile List
- User List
- Group List

Settings
- Outgoing E-mail Configuration
- Microsoft Exchange Integration

Utilities
- Reindex Files
- Rename User ID
- Reassign User ID
- Change Data ID

Platinum
- Platinum Server Configuration
- HotBackup Vault
- Initialize SQL
- Initialize SQL Profiles
- Tabs3 Connect Administration

View
- Active User List
- Open Windows Maximized
- Log Files
  - Support Log
  - Error Log
  - Reset Log
  - Tabs3 Connect Log
  - Tabs3 Connect Access Log
- Status Bar
- Toolbar

Window
- Cascade
- Tile Horizontally
- Tile Vertically
- Arrange Icons

Help
- Help Topics
- What's New
- Reset Optional Messages
- Internet Resources
  - Web Site
  - Knowledge Base
  - Register Software
  - Error Submission Configuration
  - Submit Log Files
- Diagnostics
  - Network Test
  - Network Settings
- About System Config
- License Notice

Chapter 2
Data Entry

Toolbar Buttons

The following is a list of toolbar buttons found in System Configuration. Buttons that are dimmed on the toolbar indicate that they are not available in the current window.

Access Profile	This button or Ctrl+Shift+A opens the Access Profile window.
Users	This button or Ctrl+Shift+U opens the User Configuration window.
Groups	This button or Ctrl+Shift+G opens the Group Information window.
Firm	This button or Ctrl+Shift+F opens the Firm Information window.
New	The **New** button or Ctrl+N allows you to enter a new record in a file by clearing the information shown in the data entry window.
Close	The **Close** button or the ESC key closes the current window. If changes have been made, you will be asked if you want to save the changes.
Save	The **Save** button or Ctrl+S saves the changes made in the data entry window to the appropriate data files.
Print	The **Print** button or Ctrl+P allows you to output a report regarding the current file to a printer, screen or disk file.
Cut	The **Cut** button or Ctrl+X deletes the selected text and places it in the Windows Clipboard.
Copy	The **Copy** button or Ctrl+C copies the selected text to the Windows Clipboard.
Paste	The **Paste** button or Ctrl+V inserts the text from the Windows Clipboard at the pointer position in the active window.
Cancel	The **Cancel** button can abort any changes made to the current record or window.
Delete	The **Delete** button deletes the currently displayed record. You will be asked to confirm that you want to delete the record.
Prev	The **Previous** button or F3 displays the previous record in a file.

	**Next**	The **Next** button or F4 displays the next record in a file.
	**Help**	The **Help** button or F1 displays Help for the current window.

Data Entry Keystrokes

Text Editing Keystrokes

Left-Arrow	Moves the cursor left one character.
Right-Arrow	Moves the cursor right one character.
Ctrl + Left-Arrow	Moves the cursor left one word.
Ctrl + Right-Arrow	Moves the cursor right one word.
Home	Moves the cursor to the beginning of a field or line.
End	Moves the cursor to the end of a field or line.
Ctrl + Home	Moves the cursor to the beginning of a field.
Ctrl + End	Moves the cursor to the end of a field.
Tab	Moves the cursor to the next field.
Shift + Tab	Moves the cursor to the previous field.
Del	Deletes the character to the right of the cursor or deletes selected text.
Backspace	Deletes the character to the left of the cursor or deletes selected text.
Ctrl + Del	Deletes all characters to the right of the cursor on that line.

General Windows Keystrokes

Ctrl+F4	Closes the current window (not the main application window).
Alt+F4	Closes the main application window.
Ctrl+F6	Switches to the next window within the main application window.
Ctrl+Shift+F6	Switches to the previous window within the main application window.
Alt+Tab	Switches to the next application in Windows.
Ctrl+Tab *or* **Ctrl+PgDn**	Moves forward through program tabs in a window.
Ctrl+Shift+Tab *or* **Ctrl+PgUp**	Moves backward through program tabs in a window.
Alt+Down-Arrow	Displays drop-down lists and lookup windows where applicable.

Lookup Windows

A lookup window is indicated by a button. Clicking this button or pressing **Alt + Down-Arrow** will display a lookup window for the associated field. Lookup windows are used to select a specific record. Every other row is lightly shaded making it easy to read across the row. The colors in lookup windows cannot be changed.

While in a lookup window, you can use the PgUp, PgDn, Up-Arrow, Down-Arrow, Home and End keys to scroll through existing records (provided focus is on the list portion of the window). Scroll bars can also be used to scroll through the list of records. The **OK** button or the Enter key is used to select a highlighted record, and the **Cancel** button or the ESC key can be used to close the window. Double-clicking can also be used to select a record and close the window.

Lookup windows can be repositioned and resized but must be closed before switching to any other System Configuration task. The size and position of each lookup window is saved each time the lookup window is closed. Column widths in the lookup window can also be resized and are saved. To resize a column, move the mouse pointer between column headings, then click and drag the right side of the column to the desired size.

In most lookup windows, you can change the sorting order of the records by clicking a column heading. An ascending sort indicator will be shown in the column heading indicating the sorting order. Clicking the same column heading again will reverse the sort order and change the sort indicator to a descending sort indicator.

Incremental Searching

Incremental searching capabilities are available in all lookup windows based on the sorted column. After typing a letter or number when a lookup window is displayed, a small incremental search window will open allowing you to type more characters. As each character is typed, the next record in the sorted column that matches the character entered will be highlighted.

Autofill

All fields with lookup windows have autofill capabilities. As you enter characters into a lookup field, the field will autofill based on the information entered. Also, a list of possible choices matching the characters entered will be displayed, allowing you to easily select the entry you want to complete the field.

This feature can be disabled by selecting the **Disable Autofill for all lookup fields** check box in the User File.

Data Entry Programs

All files in System Configuration software use the same data entry conventions. Each file discussed in this chapter includes information on how to access the file, the purpose of the file, a brief summary of the fields in that file, any other pertinent information and a screen shot of the window. In System Configuration, the data files are:

- **User File**
- **Access Profiles**
- **Group File**
- **Firm Information**

All of these files can be accessed via the **File | Open** menu selection or via the toolbar.

The Help provided with the software has complete information regarding each field in each file and includes detailed procedures for adding, copying, changing and deleting a record.

User File

Menu Selections ***File | Open | Users***

Other Access or ***Ctrl+Shift+U***

Help ***User Configuration***

Purpose

The User file allows you to add, change, or delete user records. Each user who will be accessing the software must have a user record defined. For each user, you can specify a User ID, user name, initials, an e-mail address and a password as shown in Fig. 2-1. This program is also used to specify which access profile(s) the user belongs to. Once a user is assigned to an access profile, the user will have access to all of the programs that the access profile has been given rights to.

If PracticeMaster is being used, calendar rights can be assigned for each user as shown in Fig. 2-2. Each user can designate the background and text colors to be shown on the PracticeMaster calendar.

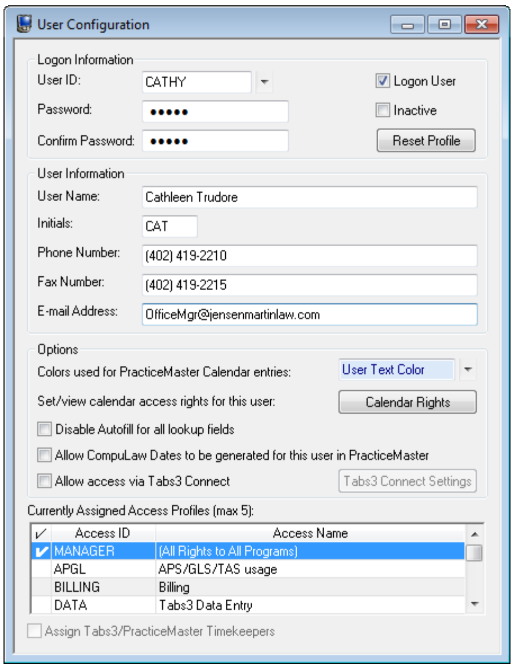


Fig. 2-1, User Configuration

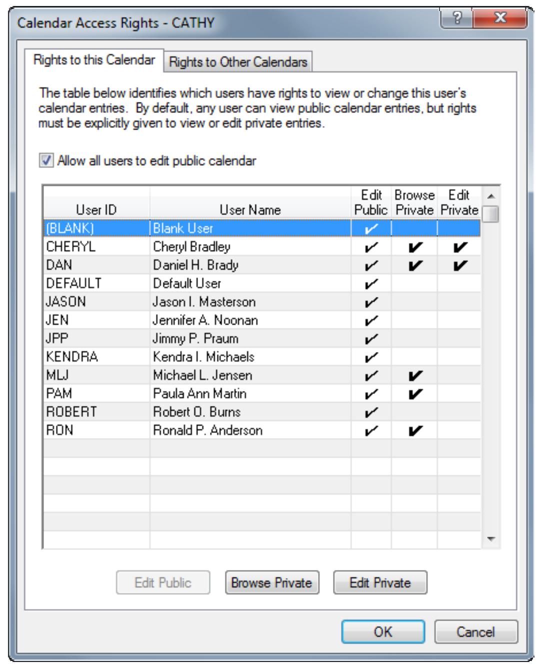


Fig. 2-2, Calendar Access Rights

Additionally, when using PracticeMaster with CompuLaw, you can designate whether you want to generate calendar records for the user via the Generate CompuLaw Dates program found in PracticeMaster.

If Tabs3 or PracticeMaster is being used, Tabs3/PracticeMaster timekeepers can optionally be assigned to the user. Assigning a timekeeper to a user indicates that the user can only access transactions and productivity figures for that timekeeper. The user will not be allowed access to transactions and productivity figures for other timekeepers. Since members of the Manager access profile have access to all information, timekeepers cannot be assigned to users who are members of the Manager access profile.

Users can change their own User Name, Initials, Password, E-mail Address, Calendar Colors and Calendar Rights if they belong to an access profile that has been assigned access rights to User Configuration. However, only members of the "Manager" group can change access profile assignments, timekeeper assignments, or add new users to the user file.

A User ID must be entered by the user when the software is started. An unlimited number of user records can be defined. However, the number of active users is limited by the level of the software license purchased.

Caution: A blank User ID is automatically created when System Configuration is installed. Make sure you edit or delete this User ID in order to preserve system security.

Summary of Fields

For each user, you can specify a User ID (with a maximum of 8 characters), an optional password (20 characters), a user name (30 characters), initials (3 characters), a phone number (25 characters), a fax number (25 characters), an e-mail address (100 characters), and which access profile(s) the user belongs to. A user who will be accessing the software (as opposed to acting as a resource for scheduling purposes) will be designated as a Logon User. A user can be marked as "inactive" when no additional records are to be assigned to the user.

The **Reset Profile** button is used to set various messages and values for a user to the system default values. You will be given the option of retaining the E-mail Configuration Profile and Outlook Synchronization Profile.

Access Profiles

Menu Selections

File* | *Open* | *Access Profile

Other Access

or ***Ctrl+Shift+A***

Help

Access Profiles

Purpose

The Access Profile program is used to add, change, or delete access profiles. It can only be accessed by managers. Access profiles are used for specifying access rights to the software. Up to 50 access profiles can be defined. A user is granted the access rights of a specific access profile via the User file.

When the software is installed, a Manager access profile and one user are automatically created. This user has a blank User Name, User ID and Password. This user is automatically assigned to the Manager access profile. The Manager access profile allows access rights to *all* functions in *all* systems and cannot be edited or deleted. Users who are assigned the Manager access profile are considered managers.

Summary of Fields

For each access profile defined, you can specify whether it should have access to the various programs in System Configuration. You can also specify whether it has access rights to Tabs3, PracticeMaster, GLS, TAS and APS as well as the various features within each of these programs. A complete listing of the detail access rights can be found in Knowledge Base Article R11348, "Access Rights" *(www.support.Tabs3.com)*.

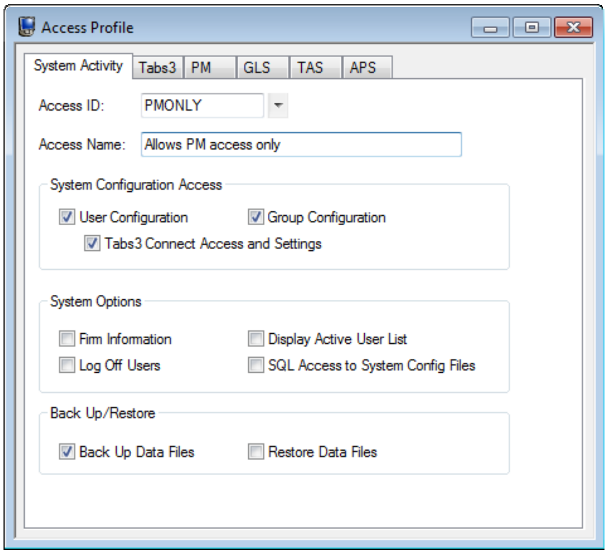


Fig. 2-3, System Activity Tab of Access Profile Program

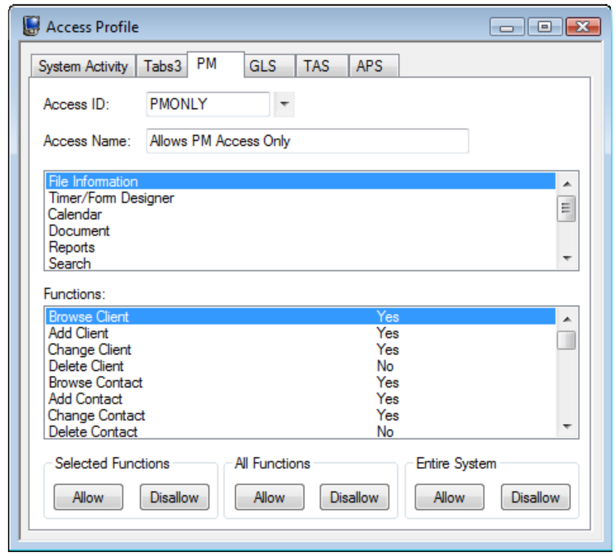


Fig. 2-4, Tabs3 Access Rights

Group File

Menu Selections — ***File | Open | Groups***

Other Access — *or* ***Ctrl+Shift+G***

Help — ***Group Information***

Purpose — The Group file allows you to add, change, or delete groups. Groups are composed of various users solely for PracticeMaster calendaring, scheduling, and eNote purposes.

Summary of Fields — For each group, you can specify a group ID (maximum 8 characters), a group name, and which users are members of the group.

The Group Configuration program can only be accessed if the user is a manager or belongs to an access profile that allows access to Group Configuration.

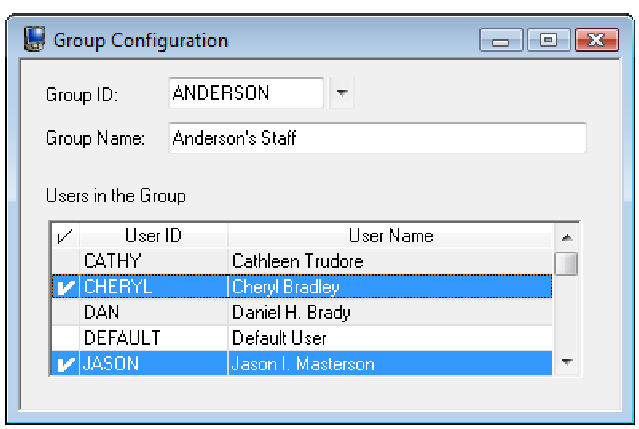


Fig. 2-5, Group Configuration

Firm Information

Menu Selections ***File | Open | Firm***

Other Access *or* ***Ctrl+Shift+F***

Help ***Firm Information***

Purpose This program stores information about the firm that is used by all software.

Summary of Fields Includes the firm's name (60 characters), address (3 lines, 33 characters each), state (15 characters), county (20 characters), Federal ID # (11 characters), phone number (12 characters), fax number (12 characters), e-mail address (100 characters), and Web site (1,000 characters).

By default, Tabs3 billing statements will use the firm name and address information. Alternatively, Tabs3 Statement Designer can use any or all Firm Information fields. The firm name is used in the heading of all software reports, on APS and TAS 1099 Forms and on the TAS check when a check is entered with a payee of FIRM. The address is used on 1099 Forms and TAS checks. Most fields are available for PracticeMaster document assembly purposes.

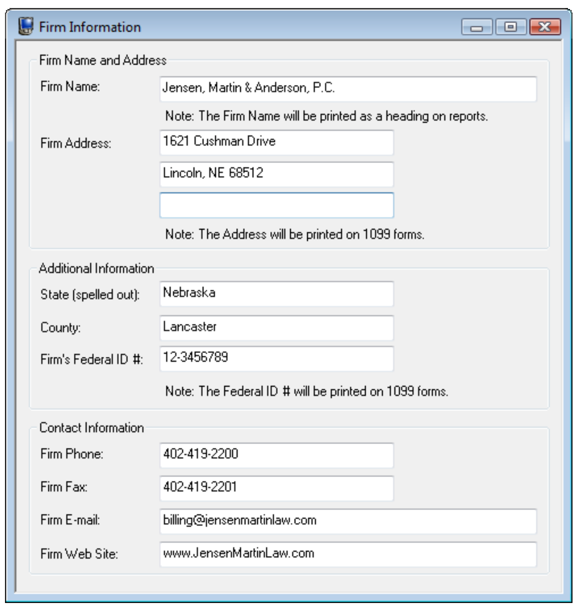


Fig. 2-6, Firm Information

Copy from List

When selecting an item from a list in the User Lookup and Group Configuration windows, you can copy the selected item to the Windows clipboard using Ctrl+C or the button.

- When pasting the selection into a word processing program, such as Microsoft Word, headings will be bolded and background colors (if selected) will be applied to each row. Rich text field attributes such as **bold** and *italics* are retained. All data will be separated by tabs.
- When pasting into a spreadsheet program, such as Microsoft Excel, each column will be separated into cells. Rich text field attributes are not retained. Formulas and calculated fields are not included.
- When pasting into any other program, the text will be separated by tabs, but without any formatting.

Deleting Records

To delete a record, first open the file and display the record you want to delete. Then, click the  button or select the **Delete** menu option from the **Edit** menu. You will be asked to confirm that you want to delete the record.

Caution: Before deleting a record, refer to the appropriate “Deleting a _______” topic in Help so you are aware of any restrictions, recommendations, and consequences regarding the deletion of that information.

Chapter 3
Printing

Default Windows Printer

The software can print to any installed Windows printer. For each workstation, the software maintains a default report printer, default Tabs3 final statement printer, default Tabs3 draft statement printer, default APS check printer, and default TAS check printer. Each time a print job is generated, the previously used default printer will be selected. You can use this printer or select a different printer. Selecting a different printer will save that printer as the new default printer for that type of print job.

Printer Setup

Menu Selections ***File | Print Setup***

The **Print Setup** menu option displays the Printer Setup window as shown in the following figures. The Printer Setup window can also be accessed by clicking the **Setup** button in the Print dialog box at print time *(page 34)*.

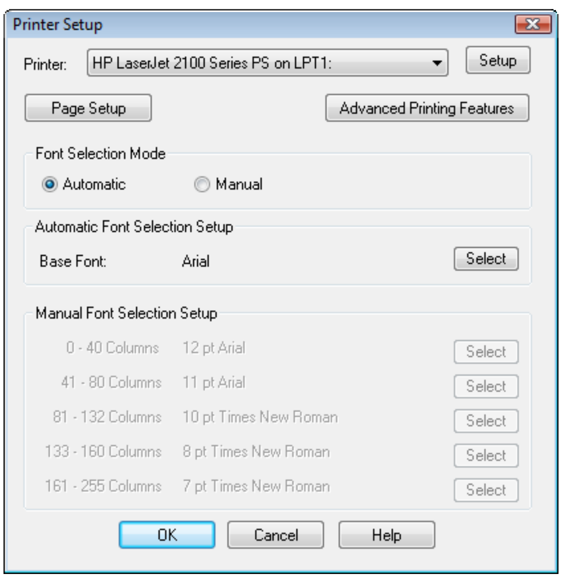


Fig. 3-1, Printer Setup Window
with Automatic Font Selection

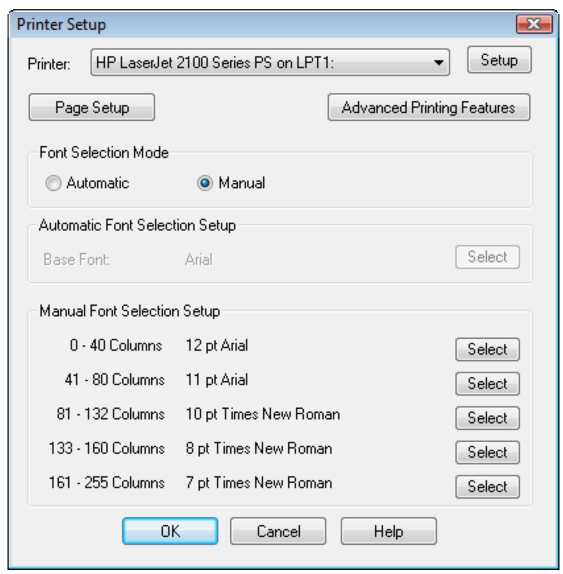


Fig. 3-2, Printer Setup Window
with Manual Font Selection

This window can be used to configure the various Windows printers that will be used by the workstation. Configuration includes specifying the default fonts, page margins, and advanced printing features for each Windows printer that will be used.

Note: The same fonts are used for both printing and previewing. The software supports proportional fonts and fixed pitch fonts.

Setup

Clicking the **Setup** button in the Printer Setup window displays the standard Windows Print Setup dialog box for the specified Windows printer. Use this dialog box to change the paper size, source, orientation, and properties (or options) for the printer.

The options available in the Print Setup dialog box are determined by the version of Windows being used and the printer software driver installed.

Page Setup

The Page Setup dialog box allows you to specify page margins for the selected printer. All settings are specified in inches.

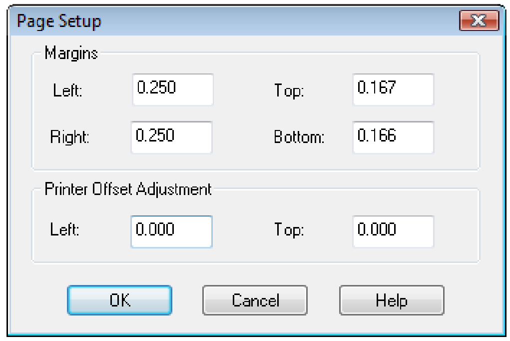


Fig. 3-3, Page Setup Window

Margins

You can specify a Left, Right, Top and Bottom margin for pages of reports and Tabs3 statements. Margins can be a maximum of 9.999 inches. The minimum margin is determined by the selected printer. *(Note: You must have more than 2 inches of horizontal printing area and more than a half inch of vertical printing area.)*

Margins do not apply when printing Tabs3 envelopes.

If including a letterhead bitmap on Tabs3 statements *(as specified in the Statement Setup window)*, the Top and Bottom Margins do not apply to the bitmap. The Left and Right Margins may apply depending on whether the Bitmap Alignment specified is based on the margins or page width.

Margins also apply when printing checks (APS and TAS), 1099 Forms (APS and TAS), and labels (Tabs3 and APS). However, when printing labels using the Avery Laser or Two-across option, you should use the minimum margins for your selected printer. If you need to make adjustments, use the Printer Offset Adjustment to make the adjustment instead of the Margins because the Printer Offset Adjustment adjusts the entire printed page. You may want to set up a special Windows printer for printing laser labels.

Note: Each Windows printer has its own minimum margins. If you're not sure what the minimum margins are, you can easily check the margins by entering "0" (zero) in the selected margin field. After pressing the Tab key to move the cursor to the next field, the zero will automatically be replaced by the minimum margin.

Printer Offset Adjustment

This information is used for fine-tuning the exact starting position when printing labels (Tabs3 and APS), checks (TAS and APS), 1099 forms (TAS and APS) and any other forms. These adjustments can have a minimum of -9.999 inches and a maximum of 99.999 inches and affect all printed output. These adjustments affect only the printed output; they do not affect the output shown in the Preview window.

Tip: You may want to define special Windows printers specifically for printing labels, checks and 1099 forms.

Font Selection Mode

Each Windows printer can be configured for **Automatic** Font Selection or **Manual** Font Selection. This option is used when printing reports, labels (Tabs3 and APS), checks (TAS and APS), and 1099 forms (APS and TAS).

Note: This option is not used when printing Tabs3 billing statements.

Automatic When a printer is configured for Automatic Font Selection, the appropriate font size for the specified Base Font will automatically be selected so reports print within the full width of the specified paper size (minus the margins). When Automatic Font Selection is selected, the fonts specified for Manual Font Selection Setup are not used.

Manual When a printer is configured for Manual Font Selection, the fonts specified in the Manual Font Selection Setup will be used to print a report. The report width determines which manual font is used. When Manual Font Selection is selected, the Base Font specified for Automatic Font Selection Setup is not used.

Base Font

The Base Font is used to specify the Font (i.e., Arial, Times New Roman, Courier, Letter Gothic, etc.) and Font Style (i.e., normal, italics, etc.) when Automatic Font Selection is used. The Base Font selection is dimmed when Manual Font Selection is used.

The **Select** button displays the standard Windows Font dialog box. The software supports proportional fonts and fixed pitch fonts, all of which are included in the font list. Although a Font Size can be selected, it is not used because the Font Size will automatically be selected each time a report is run based on the report width. The Strikeout and Color options are not used.

Any change made to the Base Font for the selected printer is saved when the **OK** button in the Printer Setup dialog box is clicked.

Manual Font Selection Setup

When a printer is configured for manual font selection, the fonts specified in this setup area determine which font is used based on the report width. Manual font selections are dimmed when automatic font selection is used. The possible report widths are classified as follows:

0 - 40 Columns
41 - 80 Columns
81 - 132 Columns
133 - 160 Columns
161 - 255 Columns

An easy way to find out the width of a report with the options you've specified is to first preview the report, click the **Control** menu in the title bar of the Preview window, and select the **Report Info** menu option.

For each classification, the **Select** button can be used to display the standard Windows Font dialog box, allowing you to specify the Font, Font Style and Font Size. The software supports proportional fonts and fixed pitch fonts, all of which are included in this font list. The Strikeout and Color options are not used.

Any change made to the manual fonts for the selected printer is saved after clicking the **OK** button in the Printer Setup dialog box.

Advanced Printing Features

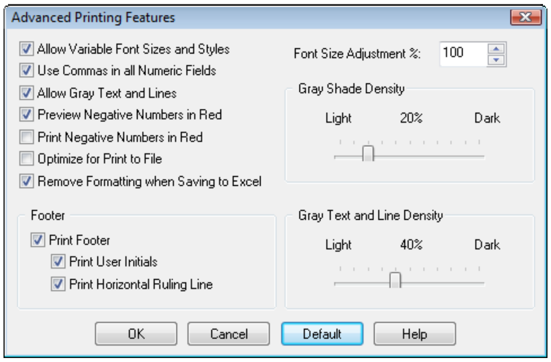


Fig. 3-4, Advanced Printing Features

The Advanced Printing Features window allows you to specify how you want the various advanced printing features for reports handled by the specified printer. Keep in mind that these settings affect the Preview window output as well as the printed output.

Note: These settings apply to all reports in all Tabs3 and PracticeMaster software products with the following exceptions. These settings do not apply to Tabs3 Report Writer or GLS Report Writer. The only setting in this window that applies to Tabs3 statements is the **Optimize for Print to File** setting.

Allow Variable Font Sizes and Styles

If this check box is selected, multiple font sizes and font styles (i.e., bold, italics, decreases and increases in point size) are used to enhance the appearance of the report. If this check box is cleared, only a single font size will be used for the report and some font styles will be removed. Typically, this check box is selected for laser and ink-jet printers but cleared for dot matrix printers and/or monospaced fonts.

Use Commas in all Numeric Fields

If this check box is selected, numeric fields and dollar amounts on reports will print with commas (e.g., 1,000). If this check box is cleared, commas will not be printed (e.g. 1000). Although selecting this check box improves readability of numeric fields on reports, selecting this check box causes a smaller font to be selected when Automatic Font Selection is being used. Additionally, when this check box is selected, longer numbers may be printed in a smaller font or cause a line break in order to show the entire number.

Allow Gray Text and Lines

Some reports may emphasize or de-emphasize certain sections by using gray text and lines, thereby providing contrast from the black text and lines in order to improve report readability. Select this check box if you want to use gray text and lines. Clear this check box if you want gray text and lines to print as solid black instead of gray. The **Gray Text and Line Density** slider bar in this window can be used to adjust how dark the gray text and lines print.

Preview Negative Numbers in Red

If this check box is selected, the negative numbers on most reports will be shown in red in the Preview window. If this check box is cleared, negative numbers will be shown in solid black in the Preview window. If both the **Preview Negative Numbers in Red** and **Allow Gray Text and Lines** check boxes are selected, negative numbers that print in the gray text area are shown as gray.

Print Negative Numbers in Red

If this check box is selected, the negative numbers on most reports will be printed in red. Printers not capable of printing color will print the negative numbers in a shade of gray. If this check box is cleared, negative numbers will print in solid black. If both the **Print Negative Numbers in Red** and **Allow Gray Text and Lines** check boxes are selected, negative numbers that print in the gray text area are shown as gray.

Optimize for Print to File

Select this option if you will be using the printer to save a report to a disk file. When this check box is selected, the software will make adjustments using character counts instead of font calculations, thus eliminating clipping problems encountered when printing to a file.

Note: It is not always possible for the file output to match the printed output or preview window.

Note: We do not recommend selecting this option for your normal printing jobs because of adjustments made to avoid clipping problems. When saving output to a disk file, the best solution is to configure a special printer for print-to-file output. Refer to the “Recommended Guidelines for Saving Reports to a Disk File” on page 35.

Remove Formatting when Saving to Excel

The **Remove Formatting when Saving to Excel** check box applies when saving a report to a file and selecting either the **Excel Files (*.xlsx)** or **Excel files 97-2003 (*.xls)** file type. If this check box is selected when saving to an Excel file, all font size adjustments and styles (i.e., point size changes, bold, red, italics, and gray text), number formatting (i.e., commas, percent signs, trailing zeros, and currency), gray and black lines, and shading are removed from the output file. If this check box is cleared, the report will include this information in the Excel file. Additional information regarding Excel output can be found in Knowledge Base Article R11280, “All About Outputting Tabs3 and PracticeMaster Data to Excel” *(www.support.tabs3.com)*.

Print Footer

If the **Print Footer** check box is selected, a footer prints at the bottom of all report pages (excluding statements, labels, checks, and 1099 forms). The right side of the footer includes the date and time when the report was run and the left side of the footer optionally includes the initials of the User ID who ran the report. If this check box is cleared, a footer will not print on reports printed by this printer.

Print User Initials

This option is available only if the **Print Footer** check box is selected. Select this check box if you want the initials of the user who prints the report to print on the left side of the footer (not the User ID). The user initials (up to 3 characters) are defined in the User file. Clear this check box if you do not want the user’s initials to be printed in the footer.

Note: User initials are not available in Tabs3 Remote.

Print Horizontal Ruling Line

This option is available only if the **Print Footer** check box is selected. Select this check box if you want a horizontal ruling line to print across the page immediately above the footer. Clear this check box if you prefer the footer to print without the horizontal ruling line.

Font Size Adjustment %

Minimum of 50% and maximum of 150%. The default **Font Size Adjustment %** is 100%, which indicates no adjustment. You can use this option to adjust the selected font size by a percentage in the event that you want the calculated font size to be slightly larger (or slightly smaller). Adjusting the **Font Size Adjustment %** field will adjust the font size by the specified percentage but retain the report width. For example, if the font selected is a 10 point font, specifying a 120% adjustment will force the report to use a 12 point font instead (i.e., 10 point. x 120% = 12 point). If you find the font size too small, try starting with an adjustment of 110% and using a trial and error approach to determine if this adjustment works for all reports. Although this option is typically implemented in conjunction with Automatic Font Selection, it also applies when Manual Font Selection is employed.

Note: Be aware that this adjustment affects ***all*** reports in ***all*** Tabs3 and PracticeMaster software products and may cause undesirable results for some reports such as clipping, overprinting, and other spacing issues. Most firms will keep this setting at the default 100%.

Note: As an alternative to using this method, consider changing the Font Selection Mode to **Manual** and specifying the desired font size.

Tip: This feature is primarily used for micro adjustments for fine tuning the calculated font size. If most of your reports look good but you want to make adjustments for one particular report, consider setting up a special printer to be used for that report.

Note: This feature is not a zoom feature. A special zoom feature is available when previewing reports on the screen.

Technical Note: The vertical spacing is based on the height of the font actually printed (except for checks, forms, and labels which always print using 6 lines per inch).

Gray Shade Density

Minimum of 0% and maximum of 100%. The default **Gray Shade Density** is 20%. Some reports emphasize certain text using a technique that prints a gray shaded area behind the text. The **Gray Shade Density** box includes a slider bar that can be used to lighten or darken the density of these gray shaded areas. When adjusting the slider bar, the corresponding percentage is shown above the slider bar. Setting the **Gray Shade Density** at 0% removes the gray shading completely whereas setting it at 100% prints an extremely dark gray—but not solid black (so as to allow black text to still be seen). Different printers have different thresholds of gray shading; therefore, we recommend experimenting with this setting to achieve the best result for your printer output. For example, you may find that 25% is way too dark for your printer, 15% prints no shading but 17% is perfect. This option does not affect gray text or gray lines.

Gray Text and Line Density

Minimum of 0% and maximum of 100%. This option is only available if the **Allow Gray Text and Lines** check box is selected. The default **Gray Text and Line Density** is 40%. The **Gray Text and Line Density** box includes a slider bar that can be used to lighten or darken the density of the gray text and gray lines. When adjusting the slider bar, the corresponding percentage is shown above the slider bar. Setting the **Gray Text and Line Density** at 0% prints the gray text and lines extremely light, but does not remove the text and lines completely whereas setting it at 100% prints solid black. Different printers have different thresholds of gray shading; therefore, we recommend experimenting with this setting to achieve the best result for your printer output. For example, you may find that 50% is too dark for your printer, 25% is too light but 43% is perfect. This option does not affect the gray shaded area that prints behind black text.

The **Default** button will reset all Advanced Printing Feature values to their original default values.

Statement Setup

Additional printer configuration options are available for Tabs3 statement printers as shown in the following figure. Complete details regarding Tabs3 Statement Printer Configuration can be found in the Tabs3 manual or Tabs3 Help.

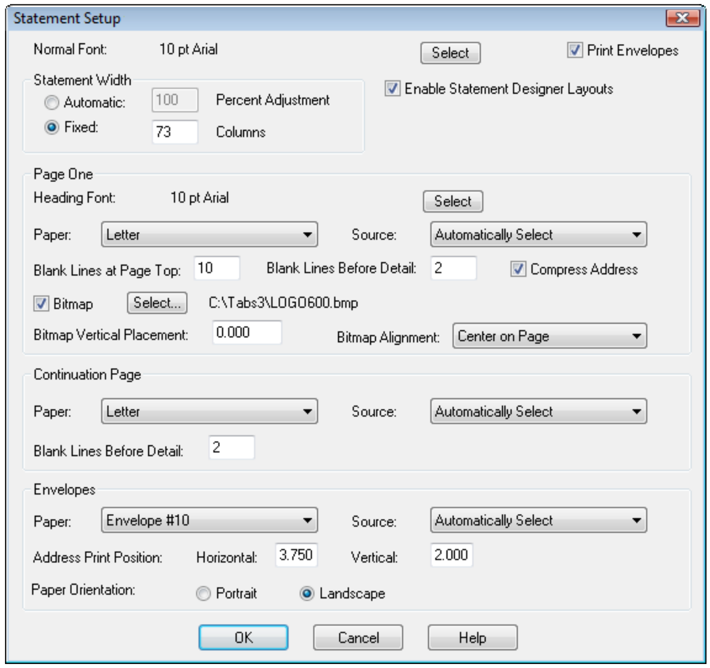


Fig. 3-5, Tabs3 Statement Printer Setup Window

Check Setup

Additional printer configuration options available for TAS and APS check printers as shown in the following figures. Complete details regarding Check Printer Configuration can be found in the TAS and APS manuals and APS and TAS Help.

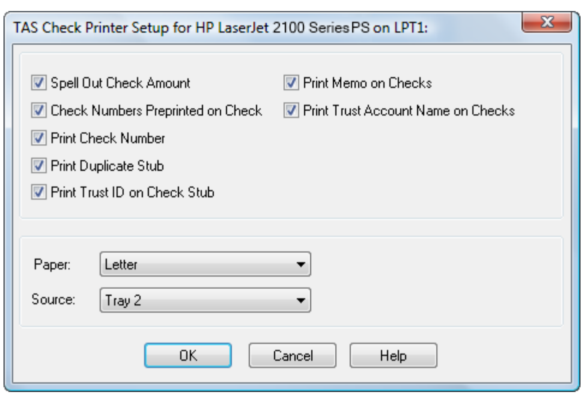


Fig. 3-6, TAS Check Printer Setup

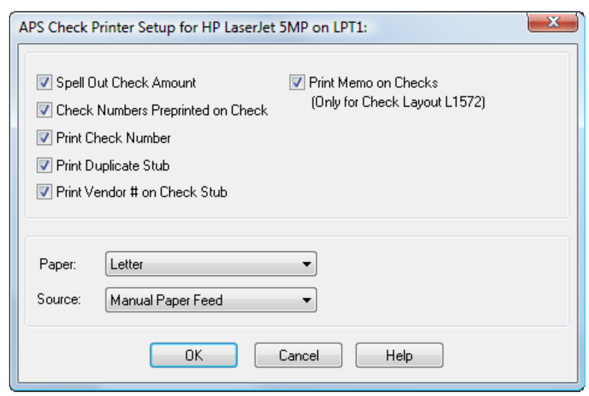


Fig. 3-7, APS Check Printer Setup

Print Dialog Box

The Print dialog box is displayed prior to printing any print job and allows you to choose the desired output device. The report's name will be displayed on the title bar of the dialog box. The default output option is the last output option selected by the workstation in any of the software.

Selected Printer Displays the printer last used in the Tabs3 & PracticeMaster software by the workstation. If you want to select a different Windows printer, click the drop-down button to display the available Windows printers. The **Setup** button displays the Printer Setup window *(page 27)*, allowing you to specify the font and other options for the selected printer.

Printer

Allows you to print a report to the printer designated in the **Selected Printer** field.

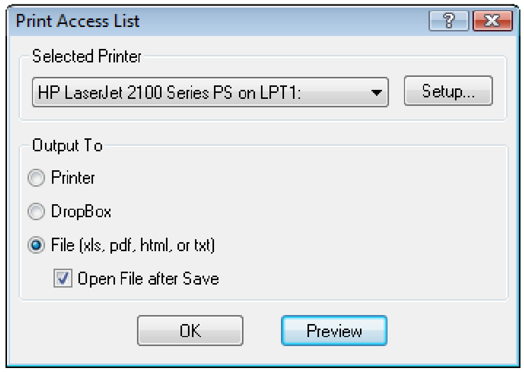


Fig. 3-8, Print Dialog Box

DropBox

Allows you to save any printed report or statement in Tabs3 & PracticeMaster software as a PDF file in the DropBox window *(page 39)*. PDF files in the DropBox window can then be e-mailed, saved, dragged or copied to another location. The DropBox acts as a temporary holding location while the software is open until you decide what you want to do with a file.

File

Allows you to save a report to a specified disk file in a PDF format, Excel format, HTML format, or ASCII text format. Saving a report allows you to display it or print it at a later time using other software such as a word processor, text editor, browser, or Microsoft® Excel®. You can also e-mail reports that have been saved as a file.

Note: We recommend setting up a separate printer that can be used when saving reports in text or HTML format to a disk file. Configure this printer using the Recommended Guidelines shown on page 35 for achieving the best results.

The standard Windows Print To File dialog box will be displayed allowing you to specify the file name and location. The **Save as type** field includes the following options:

PDF Files (*.pdf)

Select this file type if you want to save the file as a PDF file. All output is based on the selected printer's page size, margins, and font. *(Note: PDF files can also be created by using the DropBox option.)*

Excel Files (*.xlsx)

Excel Files 97-2003 (*.xls)

Select this file type if you want to save the file as an Excel file. Excel files can be viewed and edited in Microsoft Excel. Although any report can be output to Excel format, many reports have been specially optimized for Excel output. A complete list of optimized reports and additional information regarding Excel output can be found in Knowledge Base Article R11280, "All About Outputting Tabs3 and PracticeMaster Data to Excel" *(www.support.tabs3.com)*.

Note: The Excel file type is not available when generating statements or printing client labels in Tabs3, running reports via the Tabs3 Client Manager, printing vendor labels in APS, or selecting the **Export to Text** option in PracticeMaster Report Writer reports.

Note: When selecting the Excel File option from the Print dialog box, the generated file will be output without page breaks, page numbers, and continuation page headings, thereby making it easier to work with the file in Excel. However, this information is included when selecting to print to an Excel file from the Print Preview window.

Note: You can simplify the output by selecting the **Remove Formatting when Saving to Excel** check box in the Advanced Printing Features window *(page 31)*.

Text Files (*.*) Select this file type if you want to save the file as a text file. All output is based on the selected printer's page size, margins, and font. This option can also be used to show all files present in the folder.

HTML Files (*.htm, *.html) Select this file type if you want to save the file as an HTML file. HTML files can be viewed in any Web browser and are easily attached to e-mails. Horizontal ruling lines are inserted between pages and at the end of the file.

The **Open File after Save** check box opens the saved file once it is created. When this check box is selected, the file will open in the default viewer for that file type immediately after it is saved. If this check box is cleared, the file will not open, but will be saved and can be opened at a later time.

Recommended Guidelines for Saving Reports to a TXT or HTML File

In order to reliably print to a TXT or HTML file and have the information in the saved file reliably match the printed or previewed information, use the following guidelines:

Note: We recommend setting up a special printer for generating TXT or HTML files. The following guidelines do not apply when generating PDF files.

	Advanced Printer Options	Print Setup Options
Minimum guidelines required to prevent clipping or overwriting of fields in the output file.	• Select the **Optimize for Print to File** check box. • Clear the **Use Commas in all Numeric Fields** check box.	
Additional guidelines to ensure that the file output matches the printed output and preview window as closely as possible.	• Clear the **Allow Variable Font Sizes and Styles** check box. • Make sure the **Font Size Adjustment %** field is set at 100%.	• Select **Automatic** for the Font Selection Mode. • Under Automatic Font Selection, select a Base Font that is a TrueType monospaced font, such as Courier New.

Note: It is not possible for the TXT or HTML file output to match the printed output or preview window when using proportional fonts.

Long file names are allowed.

Caution: If the specified file already exists, you will be asked if you want to replace the existing file. Saving the information to a file that already exists will cause the original information saved in the file to be erased, with one exception. When saving an Excel file to the same file name, instead of overwriting the file, the new report will be saved to a new worksheet in the same Excel file. This makes it easy to save monthly reports to the same Excel file in different worksheets.

Once the desired output option has been selected, click **OK** or **Preview** to continue. The **Preview** button allows you to display a report in the Preview window *(page 37)* as it would appear if it were printed on the specified Windows printer.

Note: Keep in mind that changing the font for preview purposes also changes the font for printing purposes.

The Print Control window will be opened and the information will be sent to the desired output device.

Print Control Window

When first opened, the Print Control window is either hidden *(if the Open Windows Maximized option is turned on)* or immediately minimized. It shows all active print jobs for the workstation in the current software system (i.e., each software system has a separate Print Control window). Each print job shown includes a job number, status, number of pages, and description.

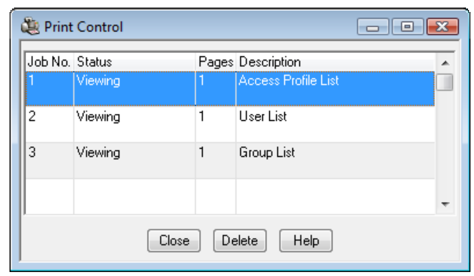


Fig. 3-9, Print Control Window

Multiple print jobs are processed in "First-In First-Out" order. For example, if a print job is being processed while another print job is sent, the first print job will continue to process until completion. Once that print job has completed, it will begin processing the next print job.

Close

The Print Control window cannot be manually closed. Therefore, the **Close** button does not really close the window; it either minimizes the window or hides it. *(Note: If the Open Windows Maximized option is turned on, the window will be hidden instead of minimized when selecting the Close button.)* The Print Control window will be closed automatically after the last print job is completed. This means if a job is being previewed, the Print Control window will be closed when the Preview window is closed. If a job is being printed or saved to a disk file, the Print Control window will be closed once all information has been sent to the printer or disk file.

Delete

The **Delete** button can be used to pause or delete the highlighted print job.

If the print job is still processing, you will be asked if you want to abort the print job. Click **Yes** if you want to abort the print job; otherwise click **No** if you want to resume processing.

If the print job has completed processing and you are *printing*, the print job will no longer be shown in the Print Control window. At this point, the entire print job has already been sent to the printer.

If the print job is being previewed and processing has completed (i.e., Status = Viewing), the **Delete** button will close the associated Preview window.

Printing Note: Once a complete or partial print job has been sent to the printer, the software no longer has control over that print job (or portion thereof). If you want to cancel a print job that has already been sent to the printer, you will have to abort the print job at the printer level or Windows print queue level.

Preview Window

The Preview window is displayed when the **Preview** option is specified in the Print dialog box *(page 34)*. The Preview window allows you to display a report as it would appear if it were printed using the specified Windows printer. The same fonts used for printing are used for previewing as well.

While a report is being processed, the page number of each page being processed will be displayed in the lower left-hand corner of the Preview window (as well as in the Print Control window). The report name will be shown on the title bar of the Preview window. The report width can be seen by clicking the **Control** menu on the title bar of the Preview window and then selecting the **Report Info** menu option.

If no information is selected for the report, a blank Preview window is opened. The message "Nothing Printed" will be shown in the lower left-hand corner of the window, making it easy to see that no information was selected.

You can use the scroll bars to reposition the report in the Preview window. Various keystrokes are also available to reposition the report within the window when focus is on the body of the report. To place focus on the body of the report, click anywhere on it.

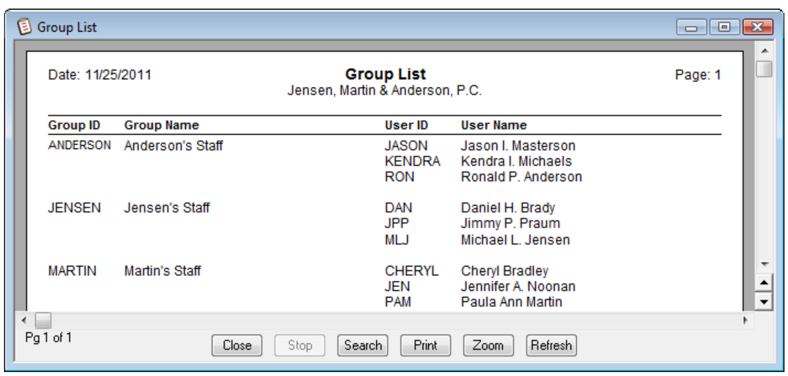


Fig. 3-10, Preview Window

Multiple Preview windows can be open or minimized at the same time. The following functions are available when previewing a report:

Close

The **Close** button or Esc closes the Preview window. The **Close** button is available only when a report has finished processing.

Stop

The **Stop** button pauses report processing. You will be asked to confirm that you want to stop processing the report. Click **Yes** if you want to abort the print job; otherwise click **No** if you want to resume processing. If you click **Yes** to abort the print job, the Preview window remains open; however, processing of the report cannot be resumed.

The **Stop** button is available only while the report is processing. Once the entire report is available in the Preview window, the **Stop** button will be dimmed and the **Close** button becomes available.

Search

The **Search** button or Ctrl+F opens a search toolbar allowing you to search forward or backward for specified text.

Fig. 3-11, Search Toolbar

Print

The **Print** button or Ctrl+P allows the current page, all pages or a range of pages to be printed, saved to a disk file, or sent to the DropBox *(page 39)*.

Note: The **Print** button is not available when previewing Tabs3 statements when the **PDFs as Individual Statements** check box is selected, or when previewing checks, labels or 1099 forms.

Excel Note: When selecting the **Print** option from the Preview window and saving to an Excel file, the generated file will be output the same as it appears in the Preview window, including page breaks, page numbers, and continuation page headings. This information is *not* included when selecting to save to an Excel file directly from the Print dialog box.

Zoom Controls

The Zoom feature lets you control how large or small a report appears in the Preview window. You can enlarge the display to make the report easier to read, or reduce the display in order to view the entire report width. You can use the Zoom button to display the following window; or you can use the keyboard and scroll function of your mouse to zoom reports instantly.

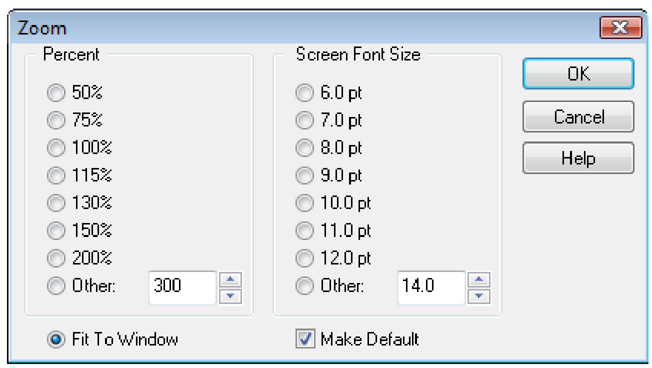


Fig. 3-12, Zoom dialog box

To enlarge the display in 5 percent increments

- Press the **Ctrl** key while scrolling up
- Press **Ctrl** + "="
- Press **Ctrl** + "+" *(on the number keypad)*

To reduce the display by 5 percent increments

- Press the **Ctrl** key while scrolling down
- Press **Ctrl** + "–"

To toggle between 100 percent and Fit to Window

- Press **Ctrl** + "**Double-click mouse wheel**"
- Press **Ctrl** + "**0**" (zero)
- Press **Ctrl** + **Insert**

Refresh

The **Refresh** button or the F5 key reprocesses the report and redisplays it in the same position within the Preview window. This feature is particularly useful after editing a transaction via the drill-down feature. Pressing **Refresh** will reprocess the report and reflect any edits made. *(Note: This function is not available for all reports.)*

Drill-Down Capabilities

Many reports in the software have drill-down editing capabilities when displayed in a Preview window. When you mouse over a drill-down field, it will be highlighted in yellow. Clicking this field will open the appropriate data entry window for that field allowing you to edit the record. For example, if you preview a draft statement and want to edit a transaction, simply click on the transaction. After saving the change and closing the data entry window, you will be returned to the Preview window. Press the **Refresh** button (or F5) to reflect the change you just made.

For a complete list of reports that have drill-down fields, refer to article R10646 “Drill-Down Features in the Software” in our Knowledge Base *(www.support.Tabs3.com)*.

Preview Window Keystrokes

The following keystrokes can be used to reposition a report within the Preview window. These keystrokes are only available when focus is on the body of a report. To place focus on the body of a report, click anywhere on the report.

Home	Displays the top of the first page.
End	Displays the bottom of the last page.
PgDn	Displays the next screen.
PgUp	Displays the previous screen.
Ctrl + PgDn	Displays the top of the following page. The lower down-arrow button on the scroll bar also performs this function.
Ctrl + PgUp	Displays the top of the previous page or current page. The lower up-arrow button on the scroll bar also performs this function.
Up-Arrow	Moves the view of the report up one line. The topmost up-arrow button on the scroll bar also performs this function.
Down-Arrow	Moves the view of the report down one line. The topmost down-arrow button on the scroll bar also performs this function.
Right-Arrow	Moves the view of the report to the right. The right-arrow button on the scroll bar also performs this function.
Left-Arrow	Moves the view of the report to the left. The left-arrow button on the scroll bar also performs this function.
F5	Refreshes the report so that any edits made via the drill-down feature are reflected in the report.
Ctrl+F5	Redraws the report graphically without reprocessing it.

DropBox Window

Whenever a Print dialog is displayed in Tabs3/PracticeMaster software *(page 34)*, you can select one of the following options: **Printer**, **DropBox, File,** or **Preview**. Selecting the **DropBox** option from a Print dialog box automatically saves the report or statement as a PDF file in the DropBox window.

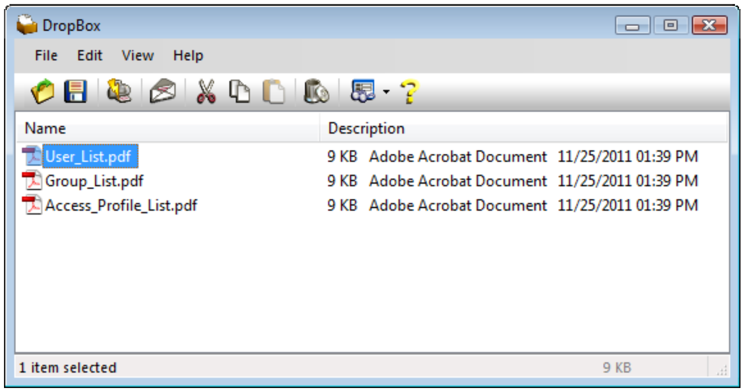


Fig. 3-13, DropBox Window

DropBox Overview

The DropBox window serves as a temporary holding area for Tabs3/PracticeMaster reports and statements that are output as PDF files via the DropBox output option. The DropBox window can also be used as a temporary holding area for any type of file on your computer, such as Word documents, text files, graphics files, video files, audio files, etc. Files in the DropBox can then be e-mailed, saved, as well as dragged or copied to another location.

The DropBox is automatically started after starting and logging into any Tabs3 or PracticeMaster software product. A icon will be shown in the system tray of the taskbar. Clicking the icon displays the DropBox window. Clicking the in the title bar of the DropBox window will minimize the DropBox window as opposed to closing it.

A toolbar, menu bar, and right-click menu options are available with commonly used functions, such as cutting, copying, pasting, printing, attaching files to e-mail messages, and more.

The DropBox window will close when the last Tabs3 or PracticeMaster software product is closed. However, if files are present in the DropBox, a message will be displayed indicating that files are present in the DropBox and will be removed. You will be asked to confirm that you want to exit. This message box includes a **Do Not Show Again** check box, which when selected eliminates the message from being displayed for the user. The warning message can be reinstated by running the **Reset Optional Messages** program.

All files in the DropBox are deleted when the DropBox window is closed. If you want to retain files that are in the DropBox, make sure you move them or save them to another location before exiting the software.

By default, the DropBox window is opened in the lower right-hand corner of the screen. It can be moved to a different location if desired. The new location will be saved and used for subsequent sessions.

A Font Overview

The software uses Windows proportional fonts and fixed pitch fonts for its reports and statements. **Proportional fonts** are fonts whose character widths vary. With proportional fonts, the letter "W" is wider than the letter "I." Fixed pitch fonts are fonts that use a fixed width for each character. When using a fixed pitch font, the letter "W" uses the same horizontal space as the letter "I." **Fixed pitch fonts** are also sometimes referred to as "monospaced fonts."

Fonts are also classified as to whether they have serifs. Serifs are the short strokes at the ends of letters in typefaces. Some individuals prefer reports printed in a font without serifs whereas others prefer serifs.

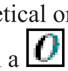
This font does not have serifs.

This font has serifs.

The fonts that are available on your system depend on what printers you are using and if any additional fonts have been installed. Many software packages include additional fonts that can be installed. Once additional fonts have been installed on your system, they are available for any Windows application.

When selecting a font, it is important that the font can be used for both the screen and printer so that your previewed information matches your printed information. When a printer font is specified and a matching screen font is not available, Windows will select what it thinks is the closest matching font. This may or may not be acceptable for previewing purposes. Likewise, when selecting a Screen font, Windows will select what it thinks is the closest matching font for printing, which may or may not be acceptable.

Fonts are also classified as scalable or non-scalable. A scalable font looks good in any point size and can be used regardless of the point size specified or required. We recommend using scalable fonts with the software. The most widely used scalable fonts are TrueType and OpenType fonts.

When selecting a font via the Print Setup program in the software, the fonts are listed in alphabetical order. TrueType fonts are shown with a  in front of the font name, OpenType fonts are shown with a  in front of the font name, and Printer fonts are shown with a  in front of the font name. These icons help identify the type of font. Using a TrueType font or OpenType font also eliminates the problem of printer fonts not matching screen fonts.

If you are not sure which font to use, we recommend trying Arial or Times New Roman as a starting point.

The fonts specified in the Print Setup program are saved in the STI.INI file for each workstation that uses the software.

Note: If using a dot matrix printer, TrueType fonts often print quite a bit slower than internal printer fonts. If your font list shows only TrueType fonts, it is possible that Windows has been configured to only list TrueType fonts in font windows.

Chapter 4
Reports

Each report discussed in this chapter includes information on how to access the report, a brief summary of the purpose and benefits of the report and how often the report is normally run. Additionally, a “snapshot” of the detail of the report is shown for quick reference. Furthermore, a page number is given for the Sample Reports chapter which includes an example of the report including headings and detail explanations.

Detailed information regarding each of the options for each report can be found in the Help provided with the software.

Note: Although the snapshots shown use a Courier font, when generating your reports, the font designated for the selected printer will be used.

User List

Menu Selections	***Reports* | *User List*** *or* ***Shift+Alt+U***
Purpose	For each user, the User List shows the User ID, User Name, E-mail Address, and Verification ID. The list can optionally include the Logon Status, Access Profile assignments and Calendar Rights, as well as any Tabs3/PracticeMaster timekeepers assigned to the user.
Benefit	Easily check which access profiles users belong to. Also allows reviewing of calendar rights and assigned timekeepers.
Frequency	As needed.
Report Detail	Page 58.

Only members of the Manager access profile can print a User List. When System Configuration is first started, a blank User ID with no password is automatically created and assigned to the Manager access profile.

```
        User Name                                                    Access 1 Access 2 Access 3 Access 4 Access 5
User ID E-mail Address                    Verification ID   Logon User                   Calendar Access Rights

 CHERYL Cheryl J. Bradley                 0001              Yes                  MANAGER
        cbradley@burnsjensen.com                                                 Robert   Edit Public
                                                                                 Julie    Edit Public Browse Private Edit Private

 ROBERT Robert J. Burns                   0002              Yes                  MANAGER
        rburns@burnsjensen.com                                                   Cheryl   Edit Public Browse Private Edit Private
                                                                                 Julie    Edit Public Browse Private
                                                                                 Billy    Edit Public

 BILLY  Billy Jo Atkins                   0003              Yes                  VIEWONLY TAS  PMCAL
        batkins@burnsjensen.com                                                  Robert   Edit Public
               Timekeepers:    2 Paula A. Madison         4 Daniel H. Brady      Julie    Edit Public
                               5 Julie P. Powers

 ROOM_A Conference Room A                 0004              No
```

Fig. 4-1, User List

Access Profile List

Menu Selections ***Reports* | *Access Profile List*** *or* ***Shift+Alt+A***

Purpose The Access Profile List shows the access profiles that have been defined along with the access rights that have been assigned to each access profile. You can optionally include the access rights for individual systems in a summary or detail format. The summary format shows the access rights without descriptions whereas the detail format includes descriptions. Only managers can run this report.

Benefit Easily review access rights of various access profiles.

Frequency As needed.

Report Detail Page 60.

		Software Access					System Configuration Access			
Access ID	Name	T3	PM	GL	TR	AP	User	Firm	Group	Active
ALL	Access to all systems	Y	Y	Y	Y	Y	Y	Y	Y	Y
PMONLY	PracticeMaster access only	N	Y	N	N	N	Y	N	N	Y

Fig. 4-2, Access Profile List

Group List

Menu Selections ***Reports* | *Group List*** *or* ***Shift+Alt+G***

Purpose The Group List shows the members of each group. Groups are used by PracticeMaster for scheduling, eNote, and calendaring purposes. Only managers can run this report.

Benefit To easily see various groups and their members.

Frequency As needed.

Report Detail Page 59.

Group ID	Group Name	User ID	User Name
BURNS	Robert J. Burns’ Staff	ROBERT	Robert J. Burns
		CHERYL	Cheryl Bradley
		BILLY	Billy Jo Atkins
JENSEN	Michael L. Jensen’s Staff	MICHAEL	Michael L. Jensen
		CHERYL	Cheryl Bradley
		JAMES	James Miller
PARTNERS	Partners in Firm	ROBERT	Robert J. Burns
		MICHAEL	Michael L. Jensen

Fig. 4-3, Group List

Appendixes

Appendix A
Technical Support

We understand that customer support is an important part of customer satisfaction. When you purchase a Tabs3 or PracticeMaster product, you have our assurance of customer service and product support. Product support plays a key role in our customer service philosophy. Our Technical Support staff is dedicated to helping you get the most from the software by answering technical questions about the product and how it works.

When you invest in software that has been refined and upgraded over a period of years and field proven in thousands of installations, you will find that it doesn't require a lot of support—during installation, or in everyday operation. Nevertheless, before you invest you want to be sure that quality, reliable support is available if and when you need it.

With our software, you get the best support in the business. During working hours you can always get immediate assistance from qualified technicians who have been specifically trained to answer your questions.

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

As a new user, technical support is available at no charge during the first year. After that period, if you have not signed up for a Maintenance Plan, there will be a charge for technical support.

If you have a question or problem concerning the software, we recommend the following steps:

1. Check the product documentation including the Help provided with the software. Often, you'll find the answer to your question there.

2. Refer to our Knowledge Base on the Internet. Our Knowledge Base contains extensive information on Error Troubleshooting, Networking & Windows Issues, "How To" Articles and Product-Related Articles. Our Knowledge Base can be launched from the ***Help | Internet Resources | Knowledge Base*** menu options or found at: *www.support.Tabs3.com*

3. Consult your reseller. If you can't find the answer in the product documentation, your reseller may be able to assist you.

4. Call our Technical Support Department. If you need to call Technical Support, do the following before calling:

    a. Have the program's Serial Number, Version and Release Date available. This information is displayed by selecting **Help** from the menu bar, then choosing **About System Config** (Fig. A-1).

    b. Be at your computer.

    c. If you are receiving an error message, write down the complete error message and the steps you performed before the error occurred.

    d. Determine if the problem occurs repeatedly after a particular series of steps or if it appears to be random. If the problem occurs repeatedly, be able to describe in detail the series of steps that generate the problem.

Having this information immediately available allows our Technical Support staff to evaluate and diagnose your situation quickly and effectively.

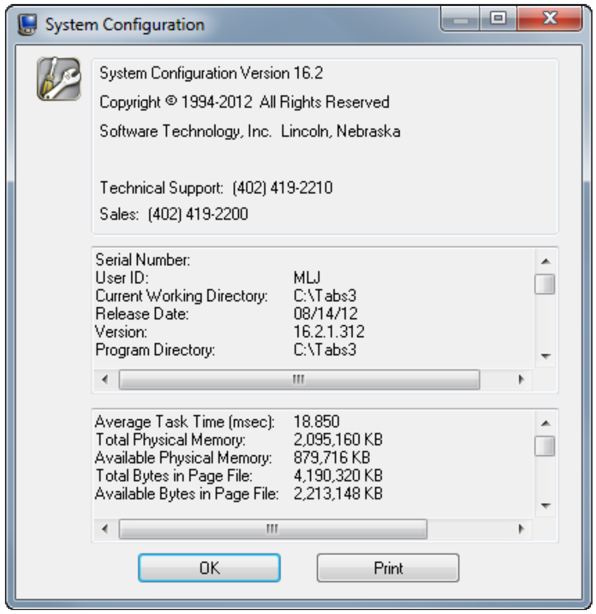


Fig. A-1, About System Configuration

Appendix B
Glossary

access profile Access profiles are used for specifying access rights to the software. Access profiles are defined using the Access Profile program in System Configuration. A user is granted the access rights of a specific access profile via the User Configuration program.

access rights Access rights can be assigned to grant permission to use particular functions. You must belong to an access profile that has access rights to the program or function you want to use before you will be allowed to access the program.

Active User List The Active User List shows the User ID, User Name, and computer name of all users who are accessing the software. For each user shown, the program being accessed will be displayed along with the function being accessed *(i.e., User Configuration, Data File Integrity Check, etc.).* Additionally, if the Detail format is selected, each function being accessed will also be displayed.

APS APS is an abbreviation for Tabs3 Accounts Payable Software. APS automates payables, keeps track of vendor discounts and recurring payables, accumulates amounts for IRS Form 1099, and allows computer check writing and manual checks. APS integrates with Tabs3, GLS and TAS.

ASCII ASCII is an acronym for American Standard Code for Information Interchange. An ASCII text file contains recognizable characters that can be found on any keyboard and can be displayed on the screen or printed on a printer.

back up To back up is the process of making a copy of data files and/or program files to insure against loss of the originals. The copy of data files and/or program files is also called a backup. It is your responsibility to establish adequate and frequent backup procedures. Your reseller or computer dealer can assist you with this task.

byte A bit (binary digit) is one piece of information. It takes eight bits to store one character; one character is one byte.

case insensitive Searching is case insensitive when searching is performed regardless of the case of the text. For example, searching for JOHN will find occurrences of John, JOHN, john or Johnson.

clipboard An area of memory where text that has been cut or copied is temporarily stored. Text remains in the clipboard until you cut or copy any additional information to the clipboard or exit Windows.

comma delimited file A file where each field of information is contained within quotes and separated from the next field by a comma. Records within the file are separated by hard carriage returns (i.e., “forced” carriage returns).

cursor A cursor or pointer is used as a position indicator on the screen. The cursor appearance will vary depending on the action being performed. It may resemble a vertical bar, pointer or hourglass.

default A value that is automatically assigned to data entry fields and options. Defaults can be accepted or overridden.

DropBox When printing reports, you can select **Printer**, **DropBox**, **File** or **Preview**. Selecting the **DropBox** option saves the report as a PDF file in the DropBox, which is a temporary holding area from which you can e-mail the file, save it, or drag and copy it to another location.

Exchange Connector The PracticeMaster Exchange Connector is a Platinum-only feature that provides a direct connection between the Platinum Server and the Microsoft Exchange Server. This allows synchronization changes to be sent directly between the servers, rather than processed via Microsoft Outlook.

exclusive function An exclusive function requires exclusive control of the specific system’s data files. Only one user will be allowed to access the program if such a function is invoked.

field A data file consists of a group of records, such as a client record in the client file. Each client record consists of a group of fields. Examples of fields in the client file include name, address, city, state, zip and phone.

firm name The firm name printed on reports is configured in System Configuration using the Firm Information program.

focus In Windows, the mouse or keyboard can be used to select elements within a window. When using a mouse, the focus is always where the pointer is clicked. However, when using the keyboard, focus is shown in a variety of ways. Focus can be indicated by an insertion point, highlighting or a dotted box. Different keystrokes may behave differently depending on where the focus is.

GLS GLS is an abbreviation for the Tabs3 General Ledger Software. GLS lets you use your existing chart of accounts and select the financial statement formats you desire. It includes a Reconciliation program to help you balance GLS with your bank statement. Financial statements can be run for any period in the current year, prior fiscal year and second prior fiscal year. GLS has multiple client capability. GLS integrates with Tabs3, APS and TAS.

group A group is composed of various users. Groups are defined in System Configuration and are used primarily for calendaring, scheduling, and eNote purposes in PracticeMaster.

Help Represents the help files that are provided with the software. It includes the detailed information about all programs within the software. Help is automatically installed when the software is installed. It can be accessed by:

- pressing F1
- selecting the ***Help | Help Topics*** menus
- clicking the help toolbar button

HotBackup HotBackup is a feature unique to the Platinum version of the 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.

inactive user A user is marked as inactive by selecting the **Inactive User** check box in the User Configuration program in System Configuration. Users are generally marked as inactive when no additional records are to be assigned to the user. Marking a user as inactive prevents that User ID from appearing in a User Lookup window.

K (Kilobyte) Abbreviation for kilobytes—one thousand bytes (actually 1,024). Used to refer to memory or disk storage space.

Long file names Long file names allow up to 255 characters for a file name or folder.

lookup window A lookup window is indicated by a down-arrow button. Lookup windows are used in various fields of the data entry programs for selecting specific records.

main application window The main application window is the base window that is opened after starting the software. Task Folders are optionally shown in the main application window for all software (excluding the System Configuration program). The main application window can be minimized, maximized and resized. The size and position of the main application window is saved for subsequent sessions.

Manager Access Profile The Manager access profile is an access profile that is predefined in the System Configuration program. The Manager access profile allows access rights to *all* functions in *all* systems and cannot be edited or deleted. Users who are assigned the Manager access profile are considered system managers in Tabs3 and PracticeMaster software.

multi-access function A multi-access function can be accessed by multiple users simultaneously. Other multi-access functions can be accessed at the same time by other users. A single user can have more than one multi-access function open on the same system. Multi-Access functions can be accessed at the same time as Single Access functions.

path A specific drive and directory (or folder) where data files are to be stored. An example of a path is: C:\TABS3\

PDF file A PDF (Portable Document Format) file is a file format developed by Adobe Systems, Inc. that preserves the appearance and format of a document including fonts, margins, and bitmap images. PDF files are compact and can be viewed or printed by anybody who has the free Adobe® Reader® software. PDF files are independent of the environment and platform in which they are created. You can download a current version of Adobe Reader from the Internet at www.adobe.com.

Platinum The Platinum Version of Tabs3 and PracticeMaster is designed specifically to meet the needs of firms with multiple users accessing the software at the same time. Although similar to standard multi-user Tabs3 and PracticeMaster software, the Platinum version of the software offers additional features including Auto-Recovery, HotBackup, Accelerators, and Log Off Users; all of which work together to enhance the overall usability, performance and reliability of the software. PracticeMaster Platinum also includes eNote, an intra-office messaging feature, and an Exchange Connector, which allows you to synchronize PracticeMaster calendars and contacts with Outlook via Microsoft Exchange without logging into PracticeMaster.

PM *See* PracticeMaster.

pointer *See* cursor.

port number A port number is a specific network identification or “address” assigned to a program. Ports are used by server computers 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.

PracticeMaster PracticeMaster, sometimes abbreviated as PM, is a complete system designed to streamline and automate many of the client and client-related functions which many firms currently perform on paper and with manual filing systems. It provides a convenient method of tracking all client information, with powerful calendaring, database, conflict of interest, reporting, document assembly features, and more. PracticeMaster integrates with Tabs3, Microsoft Outlook and Exchange, PaperPort, WordPerfect for Windows, Word for Windows, HotDocs and WORLDOX. PracticeMaster is ODBC compatible and has robust import and export capabilities.

PracticeMaster Briefcase PracticeMaster Briefcase is remote data entry software for PracticeMaster. PracticeMaster Briefcase can be used to work with client information on a separate computer without the use of a network or modem. This software is ideal for timekeepers who want to add and modify existing client information on a laptop or other computer while on the road or away from the office. Information is checked out from PracticeMaster and periodically checked in again in order to synchronize data with the home office.

print job Print jobs may consist of reports, lists, statements, labels, checks, forms or envelopes that are being previewed (i.e., displayed), saved to a disk file or sent to a Windows printer.

QuickDates QuickDates are saved settings that are used to determine a calculated date based on an original date. QuickDates are created using the QuickDate Calculator.

record A record consists of multiple fields of information. A data file consists of a group of records, such as client records in the client file. Each client record consists of fields such as name, address, city, state, zip and phone.

report width The options selected for a report determine the report width of a report, which in turn determines the size of the font used to generate the report. The report width is reported in columns (i.e., horizontal units as opposed to the width of a character).

restore The procedure used to transfer backed up data files to a hard disk. The method of backing up and restoring will vary depending on hardware, software, manufacturer's recommendations and dealer recommendations. System Configuration, Tabs3, PracticeMaster, GLS, APS, and TAS software include a restore function for the temporary Backup Data Files function built into the software.

rich text fields Rich text fields can be formatted to include bold, italic and underline attributes. Selected text can have its case reversed. Right-clicking on a rich text field shows the available options on a shortcut menu. Insert Mode and Overtype Mode are available in rich text fields.

single access function A single access function can only be accessed by one user at a time. Other users can access other functions of the software but cannot access the same Single Access function. Likewise, a user accessing a Single Access function can access other functions (both Single Access and Multi-Access functions) at the same time.

STI.INI file The STI.INI file is used by the software to store default window sizes, window positions and other settings. It is also used to store the default printer and font information. This file is maintained for each workstation.

super exclusive function A super exclusive function requires exclusive control of all systems' data files. Only one user will be allowed to access the system with a program that requires exclusive control.

Support Log The Support Log window can be used to generate a report that tracks various activities performed in Tabs3 and PracticeMaster software, such as when the last backup was made or when a reindex was performed. Each time one of the tracked features is performed, an entry is made in the Support Log for that feature.

System Configuration The System Configuration program is used to configure common elements including users and passwords, access profiles with access rights, groups, and firm information. This configuration information is used by Tabs3, GLS, TAS, APS, and PracticeMaster. The System Configuration software is provided at no charge with the software.

system date The system date refers to your computer's system date. This date can be changed via the Windows Control Panel.

system tray The system tray is located on the Windows taskbar and contains small icons for access to various programs and functions such as volume control, system resources, e-mail, etc.

Tabs3 Tabs3 is an acronym for the Time Accounting and Billing System software. In addition to allowing you to issue accurate and timely billing statements to clients, Tabs3 improves cash flow and tracking of timekeeper and staff productivity, prompts partners to bill on time and reduces unbilled work-in-process, measures and analyzes billable and non-billable time, minimizes unreported time, provides reports to analyze staff performance and reduces manual and clerical effort in the billing process.

Tabs3 Connect Tabs3 Connect is a web-based application that allows Platinum users of Tabs3 and PracticeMaster software to access their client and contact information, fee and cost entry, personal and firm-wide calendar, and more from anywhere that can access the Internet. Tabs3 Connect works on computers and devices with a current Internet browser–your iPhone®, Android device, iPad®, laptop, PC at home, or even an Apple® computer.

Tabs3 Financial Software Tabs3 Financial Software refers collectively to the Tabs3 General Ledger Software (GLS), Tabs3 Accounts Payable Software (APS), and Tabs3 Trust Accounting Software (TAS).

Tabs3 Remote Tabs3-R is an abbreviation for the Tabs3 Remote Data Entry software. Tabs3 Remote allows fee and cost transactions to be entered at a remote site and then merged with the main Tabs3 data files. Tabs3-R allows data entry without the use of a network or modem.

Tabs3 Report Writer Tabs3 Report Writer is an optional system that allows users of Tabs3 software to define and print reports and forms based on information in Tabs3. Reports can be saved in a report format, fixed field format, variable field format, dBASE III format, WordPerfect format or MS Word merge format. The forms portion of the software is ideal for printing mailing labels, rotary index cards, client file labels and much more. Most fields in the client file are accessible including work-in-process hours and amounts, billed hours and amounts, archived hours and amounts, accounts receivable figures and receipt allocation information.

TAS TAS is an abbreviation for the Tabs3 Trust Accounting Software. TAS is designed to help your firm keep track of the trusts you manage. Allows computer check writing from 99 different bank accounts as well as manually written checks. A bank account reconciliation program is included. 1099 information can be printed in TAS or combined with APS 1099 information. TAS integrates with Tabs3, GLS and APS.

taskbar The taskbar is shown on the desktop of the Windows system. The taskbar includes the Start button as well as buttons for other open programs on your system.

TCP/IP TCP/IP (Transmission Control Protocol/Internet Protocol) is a common network communications protocol used by many applications, including the World Wide Web, E-mail, and FTP. It is optimized for accuracy and reliability, and is recognized as a core technology of the Internet.

timekeeper Timekeeper is a generic label used by Tabs3 and PracticeMaster for personnel whose time is billed to clients. Timekeepers are set up using the Tabs3 or PracticeMaster software whereas users are set up using the System Configuration program. Each timekeeper is assigned a number and initials for data entry purposes. The "timekeeper" label can be changed in Tabs3 Customization. Timekeepers and users are not necessarily the same. For example, a firm that has 4 professionals and 2 secretaries will have 4 timekeepers and 6 users.

title bar The title bar is the horizontal bar at the top of a window that usually contains the name of the program, report, or document.

TrueType fonts TrueType fonts are scalable fonts that can be sized to any point size. The printed output of TrueType fonts is identical to what appears on the screen. Common TrueType fixed pitch fonts include TT Courier New and TT Letter Gothic.

UNC Universal naming convention (UNC) is a standard method of naming files and other resources on a network. UNC names typically begin with the characters "\\" such as \\SERVER\TABS3.

User ID The User ID is a unique identifier with up to 8 characters assigned to each user who will be using the software. A User ID must be entered to gain access to the software. User IDs and passwords are defined using User Configuration in the System Configuration program.

user profile The user profile is stored in the User ID record in System Configuration. The user profile includes various settings such as window sizes, Task Folder customization, default directories, optional message box settings, etc. Settings saved in the user profile are available to the user regardless of which workstation is being used whereas information saved in the STI.INI file is available for any user who uses the workstation. The user profile can be reset to the factory settings using the **Reset Profile** button in the User Configuration program in System Configuration.

verification lists Lists used to verify transactions that have been added, changed or deleted in the software. Separate verification lists are maintained for each User ID.

Appendix C
Startup Options

C Startup Options

System Configuration allows various startup options to be specified on the command line. Startup options are added to the icon or shortcut used to start System Configuration. The steps to add startup options can be found under "Adding Startup Options" on the next page.

Bypassing the User ID

As an option, the software lets you specify the User ID as a startup option. Using this option will automatically enter the User ID in the Logon dialog box that is displayed when the software is first started. If the User ID is specified for a user who has been set up with no password, then the Logon dialog box will be bypassed entirely and the main application window will be the first window displayed. However, if a password has been set up for the user, the User ID will be filled in and a password will be required.

The User ID must be a valid User ID in the User Configuration file. An example of the startup option is as follows:

"C:\Program Files\Tabs3\STICONFG.EXE" ALICE

Note: A blank User ID can be specified with quotation marks similar to the following example: "C:\Program Files\Tabs3\STICONFG.EXE" ""

Network Test

As an option, the software allows a "/NWTEST" startup parameter. This allows you to start System Configuration and automatically run the Network Test program. This feature is particularly useful because the Network Test needs to be run over an extended period of time. If the Network Test is run after business hours, the program may interfere with your backup schedule and prevent an external backup from being created successfully. The "/NWTEST" startup option, along with the startup option to automatically start System Configuration at a specified time, can be used to start the Network Test at a specified time.

At minimum, two workstations must start the test in order for the Network Test to run successfully. When this startup option is used and the Network Test is started, the Network Test will run until manually stopped using the Stop button in the Network Test window, or until the test encounters an error from which it cannot recover.

An example of the Network Test startup option follows:

"C:\Program Files\Tabs3\STICONFG.EXE" /NWTEST /T 11:30p

Starting System Configuration at a Specific Time

As an option, the System Configuration software allows a "/T" startup parameter. This allows you to start a System Configuration task at a specified time. This option is used in System Configuration only in conjunction with the "/NWTEST" startup option.

When the software is started with the "/T" option, System Configuration is started and the Start Time Countdown window will be displayed. This window includes the time remaining until the task will be started, the current date and time, the specified start time and the task selected to be performed (Network Test).

An example of the startup option is as follows:

"C:\Program Files\Tabs3\STICONFG.EXE" /NWTEST /T 11:30p

In this example, the software would automatically start the Network Test at 11:30 p.m.

Note: The normal "sign in" routine is used when System Configuration is started with the "/T" option. If you have not specified a User ID on the command line, you will be required to enter the User ID. If password security has been defined, you will also be required to enter the password before the Network Test will proceed.

Force Logon

By default, the Logon dialog box is not shown when starting subsequent systems in the same session. If you want the Logon dialog box to always be displayed when a system is started, you can use the "/FORCELOGON" startup parameter.

An example of the Force Logon startup option follows:

"C:\Program Files\Tabs3\STICONFG.EXE" /FORCELOGON

Note: Alternatively, you can force the Logon dialog box to be displayed for subsequent system startups by holding down the shift key when starting the subsequent system.

If a program is already running on the current computer and another instance of the same program is called, the current session will be called to the foreground. To start a second session, you must either set up the "/FORCELOGON" startup parameter or hold down the SHIFT key while starting the subsequent program.

No DropBox

By default, the DropBox window is always shown when a Tabs3/PracticeMaster application is started *(page 39)*. If you want to suppress the DropBox window from being loaded on a workstation when a Tabs3/PracticeMaster application is started, you can use the "/NO_DROPBOX" startup parameter.

An example of the No DropBox startup option follows:

"C:\Program Files\Tabs3\STICONFG.EXE" /NO_DROPBOX

Note: This startup option is for the workstation only. You will need to use this startup option for each Tabs3/PracticeMaster program. If you want to disable the DropBox for all computers on the network, you can simply rename or delete the DropBox.exe file.

Adding Startup Options

▶ To add a startup option

1. Using your *right* mouse button, click the **Start** button, then *(using your left mouse button)* click **Open**.

2. Double-click the **Programs** folder.

3. Double-click the **Tabs3 & PracticeMaster** folder. *(Note: If the software has been moved to a different folder, double-click the appropriate folder.)*

4. Click once on the **System Configuration** icon.

5. From the **File** menu, select the **Properties** option.

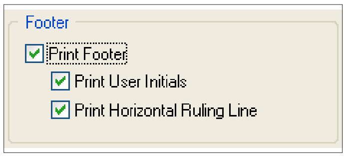
6. Click the **Shortcut** program tab in the **Properties** dialog box. The User ID can be entered following the program file name in the Target field of the **Properties** dialog box. An example of the Target field using the User ID of "Alice" is:

    "C:\Program Files\Tabs3\STICONFG.EXE" ALICE

Sample Reports

Table of Contents

Optional Report Footer



The software can be configured to include an optional footer on the reports. The footer includes the day of the week, date, and time the report is printed. You can optionally include a horizontal ruling line and the initials of the User ID who prints the report.

The footer is configured at the printer level for each workstation in the Advanced Printing Options window ***(File | Print Setup | Advanced Printing Options)***.

The following is an example of a footer with the user initials and horizontal ruling line.

DKH *Thursday 11/15/2011 1:55pm*

User List

The User List shows the User ID, User Name and e-mail address, and verification ID. The following options are available when printing the report: 1) include whether the user is a Logon User; 2) include access profiles and PM calendar rights; and 3) 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. The User List shown below includes all options.

Date: 11/15/2011

User List

Jensen, Martin & Anderson, P.C.

Page: 1

User ID	User Name E-mail Address	Verification ID	Logon User	Access 1	Access 2	Access 3	Access 4	Access 5
				Calendar Access Rights				
CATHY	Cathleen Trudore	0085	Yes	MANAGER				
	OfficeMgr@jensenmartinlaw.com							
CHERYL	Cheryl Bradley	0061	Yes	APGL	BILLING	DATA	PMDATA	
	cbradley@jensenmartinlaw.com			JASON	Edit Public	Browse Private		
				MLJ	Edit Public	Browse Private		
				DAN	Edit Public	Browse Private		
				BOB	Edit Public	Browse Private		Edit Private
				RON	Edit Public	Browse Private		Edit Private
				KENDRA	Edit Public	Browse Private		
				PAM	Edit Public			
				UNASSIGN	Edit Public			
				CATHY	Edit Public	Browse Private		Edit Private
DAN	Daniel H. Brady	0063	Yes	APGL	BILLING	SUPERVIS		
	dbrady@jensenmartinlaw.com			JASON	Edit Public	Browse Private		
				CHERYL	Edit Public	Browse Private		
				BOB	Edit Public	Browse Private		Edit Private
				RON	Edit Public	Browse Private		Edit Private
				KENDRA	Edit Public	Browse Private		
				MLJ	Edit Public			
				PAM	Edit Public			
				UNASSIGN	Edit Public			
				CATHY	Edit Public	Browse Private		Edit Private
DEFAULT	Default User	0062	Yes	MANAGER				
				BOB	Edit Public	Browse Private		Edit Private
				RON	Edit Public	Browse Private		Edit Private
				KENDRA	Edit Public	Browse Private		
				MLJ	Edit Public			
				PAM	Edit Public			
				UNASSIGN	Edit Public			
				CATHY	Edit Public			
JASON	Jason I. Masterson	0064	Yes	PMDATA				
	jmasterson@jensenmartinlaw.com			CHERYL	Edit Public	Browse Private		
	Timekeepers:	9 Jason I. Masterson		BOB	Edit Public	Browse Private		Edit Private
				RON	Edit Public	Browse Private		Edit Private
				KENDRA	Edit Public	Browse Private		
				MLJ	Edit Public			
				PAM	Edit Public			
				UNASSIGN	Edit Public			
				CATHY	Edit Public			
JEN	Jennifer A. Noonan	0065	Yes	SUPERVIS				
	jen@jensenmartinlaw.com			RON	Edit Public	Browse Private		Edit Private
				KENDRA	Edit Public	Browse Private		
				MLJ	Edit Public			
				PAM	Edit Public			
				UNASSIGN	Edit Public			
				CATHY	Edit Public	Browse Private		Edit Private

Definitions

Date The date the list was printed.

User ID The eight-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.

E-mail Address The user's e-mail address. The e-mail address is used with PracticeMaster's Send E-mail function.

Verification ID The Verification ID is a four-digit number that is internally 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.

(continued on the following page)

(continued from the previous page)

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 the previous page, user Jack has rights to edit Robert's public calendar records. Therefore, he can edit Robert's public calendar records as well as his own calendar records (both public and private). He does not have access to anybody's private calendar records (except his own). It is important to note that the Calendar Rights shown on this report are not the same as the Calendar Rights that are granted to Jack's calendar records. If you were to access Jack's user record via the User Configuration program and click the **Calendar Rights** button, you would see that Laura can edit Jack's public records and browse Jack's private 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.

Group List

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

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

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

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. For example, if an access profile has access rights to Tabs3, GLS and APS, you can specify to print only the access rights for Tabs3.

When including access rights for individual systems, a grid is shown for each system the group 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.

Options and range selections include beginning and ending Access Profile ID and the option to include access rights for individual systems. If access rights for individual systems are included, you have the option to select detail or summary access rights and which systems' access rights should be included.

You must be a manager to print this report.

The first list shown below includes a list of access profile groups and the associated access rights to each system The following list includes an example of the detail access rights for the Client Information program in Tabs3.

Note: A complete listing of the detail access rights for all systems can be found in Knowledge Base article R11348 "Access Rights" *(www.support.Tabs3.com)*.

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		Software Access					System Configuration Access			
Access ID	**Name**	**T3**	**PM**	**GL**	**TR**	**AP**	**User**	**Firm**	**Group**	**Active**
APGL	APS/GLS Entry	Y	Y	Y	Y	Y	Y	N	Y	N
APGLTR	APS/GLS/TAS Entry	Y	Y	Y	Y	Y	Y	N	Y	N
BILLING	Billing Data Entry	Y	Y	N	N	N	Y	Y	Y	Y
DATA	Tabs3 Data Entry	Y	N	N	N	N	Y	N	Y	N
PMDATA	Limited PracticeMaster usage	N	Y	N	N	N	Y	N	Y	N
PMONLY	Allows PM Access Only	N	Y	N	N	N	N	N	N	N
SUPERVIS	Supervisor Access	Y	Y	Y	Y	Y	Y	Y	Y	Y
VIEW-ALL	View-Only Access	Y	Y	Y	Y	Y	N	N	N	N

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		Software Access					System Configuration Access			
Access ID	**Name**	**T3**	**PM**	**GL**	**TR**	**AP**	**User**	**Firm**	**Group**	**Active**
BILLING	Billing Data Entry	Y	Y	Y	Y	Y	Y	Y	Y	Y

Tabs3 Access Rights

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
1)	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	N												
2)	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	N	N	Y	N	Y	Y	Y	Y	N	Y
3)	Y	Y	Y	Y	Y	Y	Y	Y	Y															
4)	Y	Y	Y	Y	Y	Y	Y																	
5)	Y	Y	Y	Y	Y	Y																		
6)	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y					
7)	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y												
8)	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y												
9)	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y											
10)	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y									
11)	Y	N	Y	Y	Y	Y																		
12)	Y	Y	Y	Y	Y	Y	Y	Y	Y															
13)	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y													
14)	Y	N	N	Y	Y	Y	Y	N																

1) Client Information
- * 1) Browse Client
- * 2) Add Client
- * 3) Change Client
- 4) Delete Client
- * 5) Browse Client Notes
- * 6) Edit Client Notes
- * 7) Browse Fee Compensation Rules
- * 8) Edit Fee Compensation Rules
- * 9) Browse Contact
- * 10) Add Contact
- * 11) Change Contact

Definitions

Date — The date the list was printed.

Access ID & Name — The eight-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.

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