

 ***Tabs3***  ***PracticeMaster***

# ***System Configuration***



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# **System Configuration**

*Version 15.3 Manual*

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# Table of Contents

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## Chapter 1 - Introduction & Getting Started . . . . . 1

Software Technology, Inc. . . . .	1
System Configuration Overview . . . . .	1
Computer Requirements . . . . .	2
Conventions Used in this Manual . . . . .	2
Conventions Used in the Program . . . . .	2
Installing the Software . . . . .	2
Starting System Configuration . . . . .	3
Logon Dialog Box . . . . .	3
Main Application Window . . . . .	4
Toolbar . . . . .	4
Status Bar . . . . .	4
Open Windows Maximized . . . . .	4
Active User List . . . . .	5
Resetting Users . . . . .	5
Exiting System Configuration . . . . .	6
Access Rights . . . . .	6
Network & Multi-User Functionality . . . . .	6
Lock Out All Users . . . . .	7
Initial File Setup . . . . .	7
Firm Information . . . . .	7
Access Profile File . . . . .	7
User File . . . . .	7
Group File . . . . .	8
Verification of Initial File Setup . . . . .	8
Help Menu . . . . .	8
Log Files . . . . .	9
Backing Up . . . . .	10
Back Up Data Files . . . . .	10
Restore Data Files . . . . .	10
HotBackup and Restore HotBackup . . . . .	11
System Configuration Data Files . . . . .	11
Client Server Versions . . . . .	11
Reindex Files . . . . .	12
Rename User ID . . . . .	12
Reassign User ID . . . . .	13
Diagnostic Utilities . . . . .	13
Network Test . . . . .	13
Network Settings . . . . .	13
System Configuration Menu Bar . . . . .	15

---

## Chapter 2 - Data Entry . . . . . 17

Toolbar Buttons . . . . .	17
Data Entry Keystrokes . . . . .	18
Text Editing Keystrokes . . . . .	18
General Windows Keystrokes . . . . .	18
Lookup Windows . . . . .	19
Data Entry Programs . . . . .	19
User File . . . . .	19

Access Profile File .....	21
Group File .....	22
Firm Information .....	23
Copy from List .....	23
Deleting Records .....	24

---

## **Chapter 3 - Printing.....25**

Default Windows Printer .....	25
Printer Setup .....	25
Advanced Printing Features .....	28
Statement Setup .....	30
Check Setup .....	31
Print Dialog Box .....	31
Print Control Window .....	34
Preview Window .....	35
Drill-Down Capabilities .....	36
Preview Window Keystrokes .....	37
DropBox Window .....	37
A Font Overview .....	38

---

## **Chapter 4 - Reports.....39**

User List .....	39
Access Profile List .....	40
Group List .....	40

---

## **APPENDIX A - Technical Support.....43**

---

## **APPENDIX B - Glossary.....45**

---

## **APPENDIX C - Startup Options.....49**

Bypassing the User ID .....	49
Network Test .....	49
Starting System Configuration at a Specific Time .....	50
Force Logon .....	50
No DropBox .....	50
Adding Startup Options .....	51

---

## **Sample Reports.....53**

User List .....	54
Group List .....	55
Access Profile List .....	56

---

## **Index.....57**

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# Chapter 1

## Introduction & Getting Started

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### 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.

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### System Configuration Overview

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

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

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.

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## 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. Recommended 1024 x 768 or higher.
- 32-bit color is recommended.
- Internet Explorer Version 8, 7, or 6.
- A CD-ROM 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.

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## 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 18.

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.

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## 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.

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## 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.

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**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.

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## 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 & PracticeMaster** folder and then click **System Configuration**.

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**Note:** Startup options can be found in Appendix C on page 49.

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

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## 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 19*).

**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 50*).

---

**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.

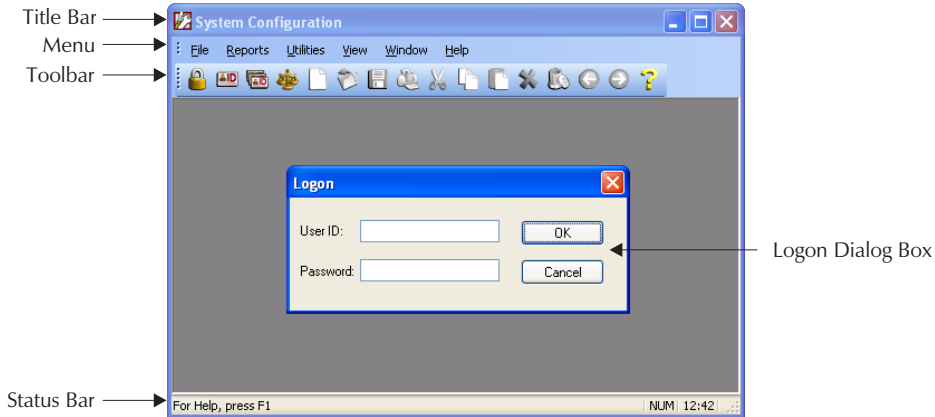


Fig. 1-1, Main Application Window

## 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 17.

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.

## 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 member of the Manager access profile, 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:** If a user who is currently using any software system is reset, the user will automatically be removed from that system when attempting to access any program within that system. Data integrity may be compromised if a currently active user is reset accidentally while using the software. Furthermore, resetting other active users may cause Fatal Errors to occur during program execution. **DO NOT** reset users unless you are absolutely sure the software is not being used. Users should always exit the software properly. The reset option should only be used when users are unable to exit the software properly due to problems with their computer such as lockups or power failures. Problems can occur if a user leaves the software running and the user is reset.

---

**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** menu or can be accessed via any text editor such as Microsoft Notepad or WordPad.

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## 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:

<b>Exclusive</b>	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 Renummer Timekeepers program in Tabs3, no other users are allowed to access any other Tabs3 program.
<b>Single Access</b>	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.
<b>Multi-Access</b>	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.
<b>Function that Prohibits Access to Other Functions</b>	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 Renummer GLS Accounts or run the Reindex Files program in GLS.
<b>Super Exclusive</b>	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](http://www.support.Tabs3.com) or [www.support.PracticeMaster.com](http://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](http://www.support.Tabs3.com)).

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## 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 23

### Access Profile File

#### Menu

*File | Open | Access Profiles*

#### Data Entry Details

Page 21

#### Sample Report

Page 56

### User File

#### Menu

*File | Open | Users*

#### Data Entry Details

Page 19

## Group File

<b>Menu</b>	<i>File   Open   Groups</i>
<b>Data Entry Details</b>	Page 22
<b>Sample Report</b>	Page 55

---

## Verification of Initial File Setup

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

<b>Firm Information</b>	<i>File   Open   Firm</i> Open the Firm file and verify the information shown on the screen.
<b>Access Profile File</b>	<i>Reports   Access Profile List</i> Print a Detail Access Profile List including individual systems and verify the information.
<b>Group File</b>	<i>Reports   Group List</i> Print a Group List and verify the information.
<b>User File</b>	<i>Reports   User List</i> Print a User List with all options selected and verify the information.

---

## Help Menu

The Help Menu consists of the following menu selections:

<b>Help Topics</b>	The <b>Help Topics</b> menu selection displays the Help Topics window.						
<b>What's New</b>	Selecting the <b>What's New</b> 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.						
<b>Internet Resources</b>	The <b>Internet Resources</b> menu consists of the following menu selections: <table> <tr> <td><b>Web Site</b></td> <td>Our Web site can be found on the Internet at: <i>www.Tabs3.com</i> or <i>www.PracticeMaster.com</i></td> </tr> <tr> <td></td> <td>Selecting the <b>Web Site</b> menu option will open your default Internet browser to the above Web page.</td> </tr> <tr> <td><b>Knowledge Base</b></td> <td>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 &amp; Windows Issues, "How To" articles and product-related articles. The Knowledge Base requires Internet access and can be found on the Internet at <i>www.support.Tabs3.com</i> or</td> </tr> </table>	<b>Web Site</b>	Our Web site can be found on the Internet at: <i>www.Tabs3.com</i> or <i>www.PracticeMaster.com</i>		Selecting the <b>Web Site</b> menu option will open your default Internet browser to the above Web page.	<b>Knowledge Base</b>	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 <i>www.support.Tabs3.com</i> or
<b>Web Site</b>	Our Web site can be found on the Internet at: <i>www.Tabs3.com</i> or <i>www.PracticeMaster.com</i>						
	Selecting the <b>Web Site</b> menu option will open your default Internet browser to the above Web page.						
<b>Knowledge Base</b>	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 <i>www.support.Tabs3.com</i> or						

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

**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 13*) tests basic network reliability for the current workstation.

**Network Settings** The Network Settings utility (*page 13*) 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.

## 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.

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## 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.

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## 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.

---

**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, and the User ID used to create the backup file is displayed in the window. For complete information regarding this program, refer to “Back Up Data Files” in Help.

## Restore Data Files

### Menu Selections

*File | Restore Data Files*

### Purpose

To restore the last backup 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.

---

For your reference, the date and time of the last backup file, and the User ID used to create the backup file is displayed in the window. For complete information regarding this program, refer to “Restore Data Files” in Help.



## HotBackup and Restore HotBackup

<b>Menu Selections</b>	<i>File   HotBackup</i> <i>File   Restore HotBackup</i>
<b>Purpose</b>	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 Client Server Versions (CSV) of the software. When using the Client Server 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 R11237, “Version 15 Data File Names” ([www.support.Tabs3.com](http://www.support.Tabs3.com)).

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## Client Server Versions

The Client Server Versions (CSV) of Tabs3 and PracticeMaster 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. As your firm grows, Client Server Version will scale with you, limiting degradation in performance caused by processing increasing amounts of data. Key features of Client Server Versions of the software include:

<b>Accelerator Technology</b>	The Client Server Version includes Report Accelerator technology to optimize report generation. For firms that process numerous large reports simultaneously, the Report Accelerator produces significant results. While any comparison depends greatly on the hardware and datafile involved, large firms typically see their most data heavy reports processed 10 to 30 times faster than with the non-CSV version of Tabs3.
<b>Auto-Recovery</b>	Transaction Processing enables Auto-Recovery in the Client Server Version. The software takes a snapshot of your data as each transaction or process starts. If a process, such as Update Statements, does not complete properly, the software automatically rolls back the process so that no error occurs. With this protection, there are fewer prompts to back up your data and a much smaller chance that you will ever need to restore from a backup. General reliability is also increased in the Client Server Version due to the underlying nature of the client server concept. More information is processed directly on the server, limiting the amount of data that is transferred over your network. This gives your network fewer opportunities to mishandle the data, and it leaves more bandwidth for your other applications that use the network. Together these features ensure the most reliable environment possible for the Tabs3 and PracticeMaster software.
<b>HotBackup</b>	In addition to faster performance, the Client Server Version also offers an ultra-convenient HotBackup feature. This feature, only available in the Client Server Version, allows you to perform backups without anyone exiting the software. Normal daily work continues. You do not need to ask everyone to exit the system. You do not need to stay late into the evening to run a backup. This eliminates the downtime typically associated with the exclusive task of running a backup.

## eNote

The Client Server Version of PracticeMaster Premier offers an intra-office messaging feature unique to Client Server Version PracticeMaster Premier users. eNote blends the best features of instant messaging and e-mail to provide a remarkably easy to use tool that streamlines communication, facilitates workflow between users, and enhances your current case management procedures.

For more information on Client Server Version software, contact the reseller from which you purchased the software or our Sales Department at (402) 419-2200.

---

## 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.

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**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 be using 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

<b>Menu Selections</b>	<i>Utilities   Reassign User ID</i>
<b>Help</b>	<b>Reassign User ID</b>
<b>Purpose</b>	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 be using the software while it is being performed.
<b>Frequency</b>	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.

---

---

## 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

<b>Menu Selections</b>	<i>Help   Diagnostics   Network Test</i>
<b>Help</b>	<b>Network Test</b>
<b>Purpose</b>	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 least 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

<b>Menu Selections</b>	<i>Help   Diagnostics   Network Settings</i>
<b>Help</b>	<b>Network Settings</b>
<b>Purpose</b>	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.

---

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## 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

### Utilities

Reindex Files

Rename User ID

Reassign User ID

Change Data ID

### Client/Server *(Client Server Versions only)*

Client Server Configuration

HotBackup Vault

### View

Active User List

Open Windows Maximized

Log Files

Support Log

Error Log

Reset Log

Status Bar

Toolbar

### Window

Cascade

Tile Horizontally

Tile Vertically

Arrange Icons

### Help

Help Topics

What's New

Internet Resources

Web Site

Knowledge Base

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.

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

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


### General Windows Keystrokes

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





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## 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.

---

## 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 Profile File**
- 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

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.

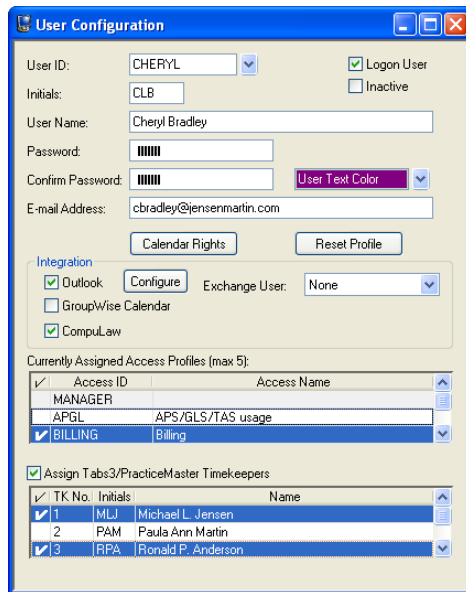


Fig. 2-1, User Configuration

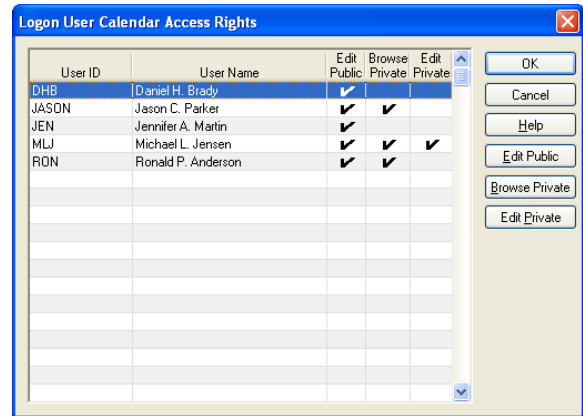


Fig. 2-2, Calendar Access Rights

You can designate whether you want the user's calendar entries integrated with Microsoft's Outlook calendar software or Novell's GroupWise calendar. Additionally, when integrating with Outlook, each user can be configured to synchronize PracticeMaster Related Parties with Outlook Contacts. When using PracticeMaster with CompuLaw, you can also designate whether you want to generate calendar records for the user via the Generate CompuLaw Dates program found in PracticeMaster.

**Note:** Integration with PracticeMaster e-mail is configured in PracticeMaster via the E-mail Preferences program.

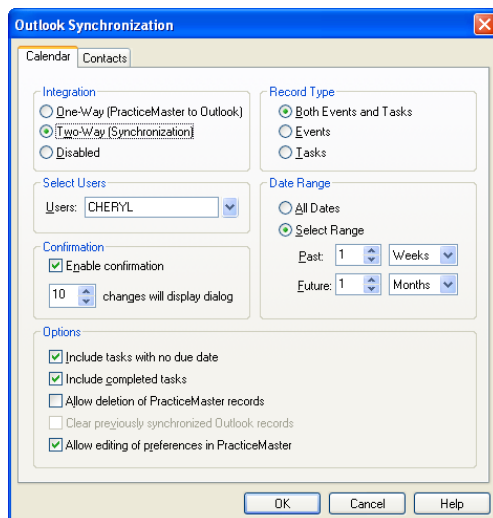


Fig. 2-3, Outlook Calendar Tab

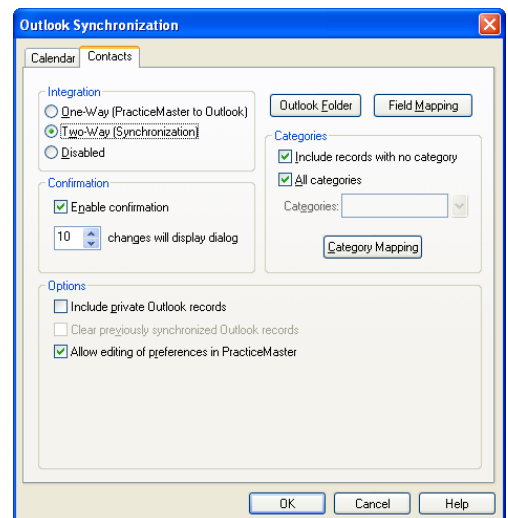


Fig. 2-4, Outlook Contacts Tab

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. Up to 999 user records can be defined. However, the number of active users is limited by the level of the software 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), Initials (3 characters), a User Name (30 characters), an E-mail address, an optional Password and which access profile(s) the user belongs to. A user who will be using the software (as opposed to being 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 reset various messages and default values for a user back to their original default values. You will be given the option of retaining the E-mail Configuration Profile and Outlook Synchronization Profile.

## Access Profile File

### Menu Selections

*File | Open | Access Profile*

### Other Access

 or *Ctrl+Shift+A*

### Help

*Access Profiles*

### Purpose

The Access Profile program is used to define access profiles. Each access profile record consists of the access rights that will be given to each user who is associated with the access profile. The access profile file does not include which users are associated with it. Access profiles are assigned to users in 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. Up to 50 access profiles can be defined.

### 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 programs within each of these software programs. A complete listing of the detail access rights can be found in Knowledge Base article R10873 “Access Rights” ([www.support.Tabs3.com](http://www.support.Tabs3.com)).

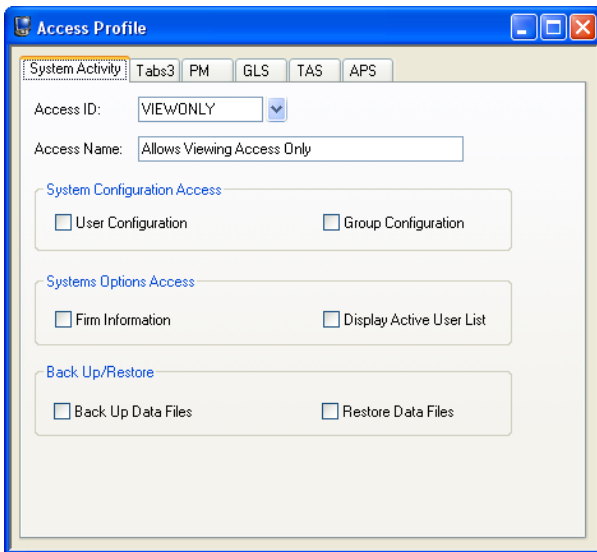


Fig. 2-5, System Activity Tab of Access Profile Program

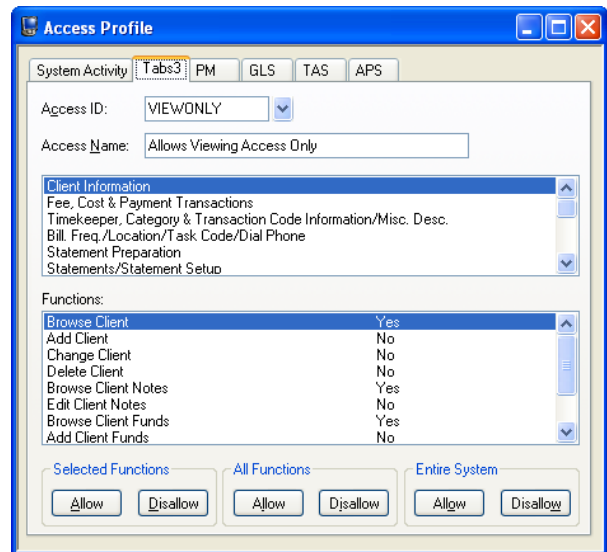


Fig. 2-6, Tabs3 Access Rights

## Group File

### Menu Selections

**File | Open | Groups**

### Other Access

 or **Ctrl+Shift+G**

### Help

**Group Information**

### Purpose

Groups are composed of various users solely for PracticeMaster calendaring, scheduling, e-mail, and eNote purposes.

### Summary of Fields

For each group, you can specify a group ID (with a maximum of 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.

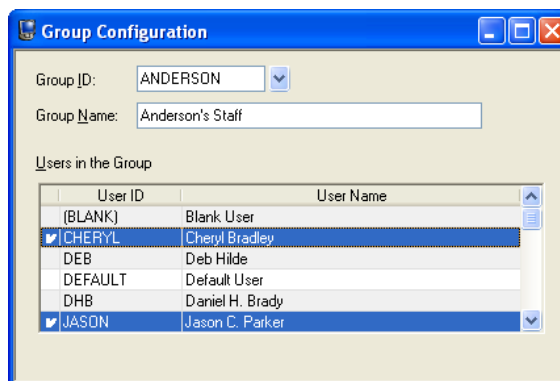



Fig. 2-7, Group Configuration

## Firm Information

Menu Selections	<i>File   Open   Firm</i>
Other Access	 or <i>Ctrl+Shift+F</i>
Help	<i>Firm Information</i>
Purpose	This program stores information about the firm that is used by all software.
Summary of Fields	Includes the firm's name, address, state, county, Federal ID #, phone number and fax number.

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.

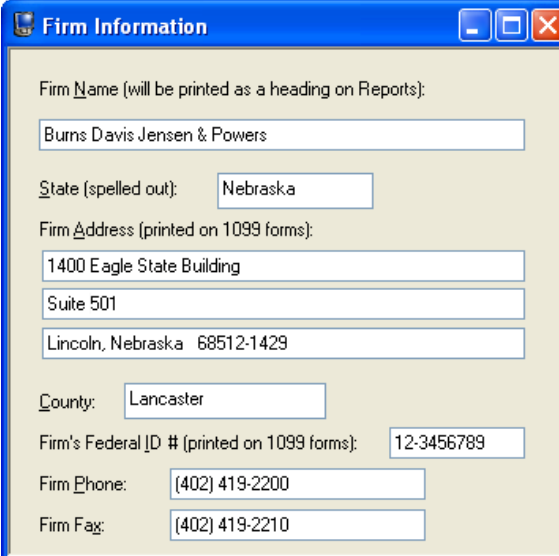



Fig. 2-8, Firm Information

---

## 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 deleted. 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 the Help to determine what the consequences may be.

---

# 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 32).

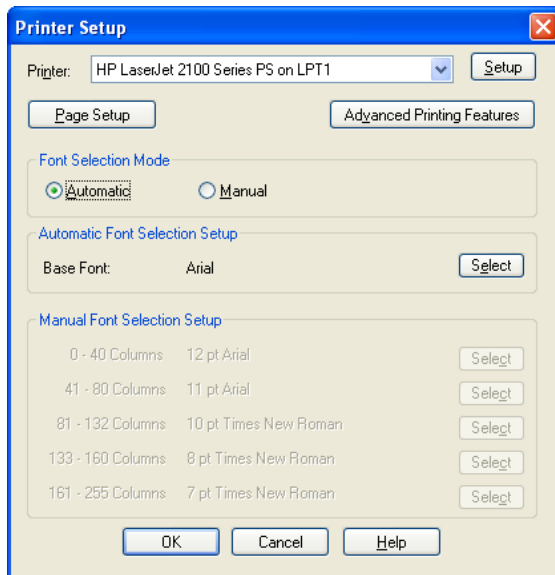


Fig. 3-1, Printer Setup Window with Automatic Font Selection

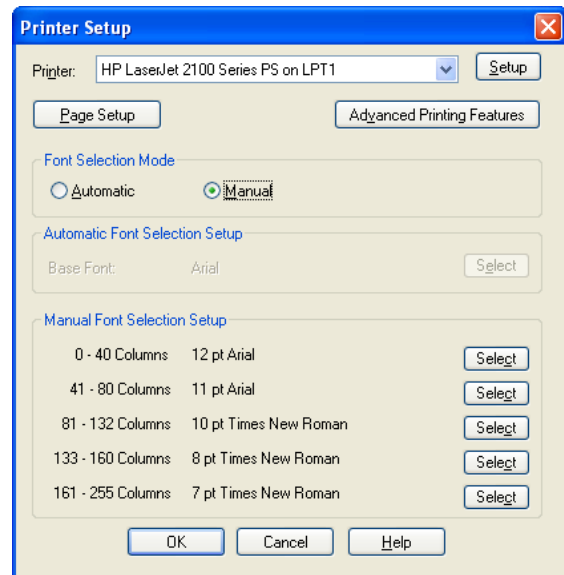


Fig. 3-2, Printer Setup Window with Manual Font Selection

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.

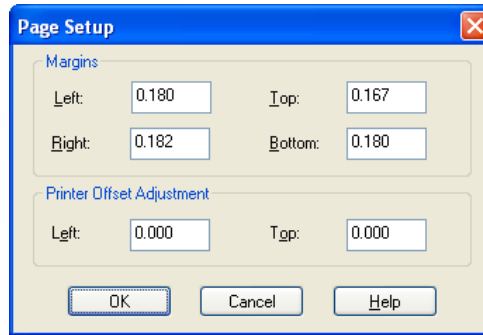


Fig. 3-3, Page Setup Window

### 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.

---

**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 its 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 pressed.

## 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

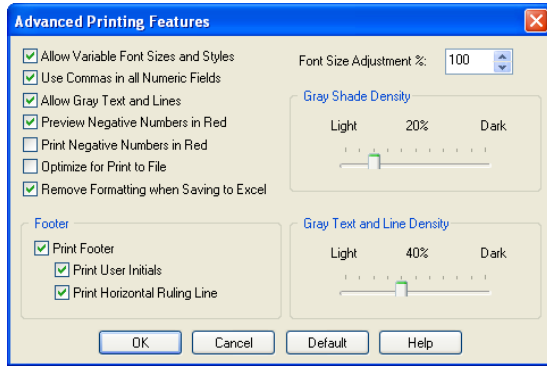


Fig. 3-4, Advanced Printing Features

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 33.

---

**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](http://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 Configuration program in System Configuration. 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.

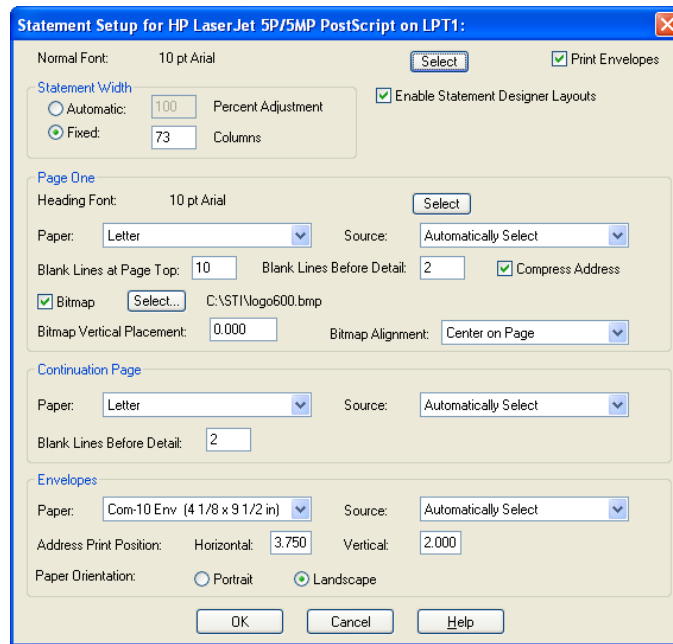


Fig. 3-5, Tabs3 Statement Printer Setup Window

## 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.

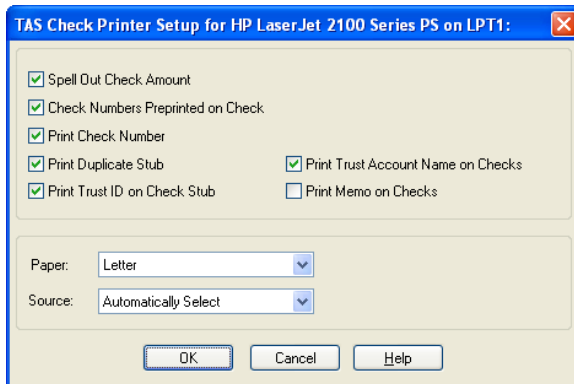


Fig. 3-6, TAS Check Printer Setup

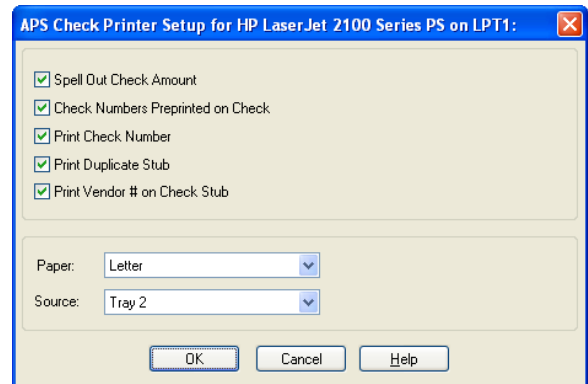


Fig. 3-7, APS Check Printer Setup

## 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 25*), 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.

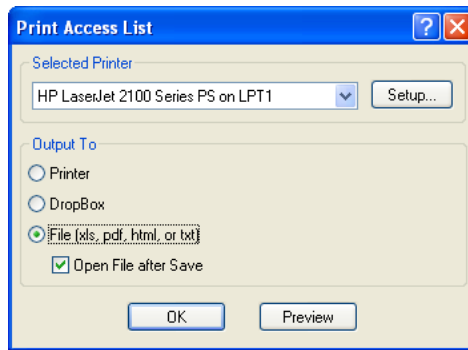


Fig. 3-8, Print Dialog Box

## DropBox

Allows you to save any printed report or statement in Tabs3 & PracticeMaster software as a PDF file in the DropBox window (*page 37*). 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 TXT or HTML format to a disk file. Configure this printer using the Recommended Guidelines shown on page 33 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:

- |   |  |
|---|--|
| <b>PDF Files<br/>(* .pdf)</b>                               | 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. ( <i>Note: PDF files can also be created by using the DropBox option.</i> )  |
| <b>Excel Files (*.xlsx)<br/>Excel Files 97-2003 (*.xls)</b> | 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!" ( <a href="http://www.support.tabs3.com">www.support.tabs3.com</a> ). |

---

**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 29).

---

**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.	<ul style="list-style-type: none"> <li>Select the <b>Optimize for Print to File</b> check box.</li> <li>Clear the <b>Use Commas in all Numeric Fields</b> check box.</li> </ul>	
Additional guidelines to ensure that the file output matches the printed output and preview window as closely as possible.	<ul style="list-style-type: none"> <li>Clear the <b>Allow Variable Font Sizes and Styles</b> check box.</li> <li>Make sure the <b>Font Size Adjustment %</b> field is set at 100%.</li> </ul>	<ul style="list-style-type: none"> <li>Select <b>Automatic</b> for the Font Selection Mode.</li> <li>Under Automatic Font Selection, select a Base Font that is a TrueType monospaced font, such as Courier New.</li> </ul>

**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 35) 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.

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.

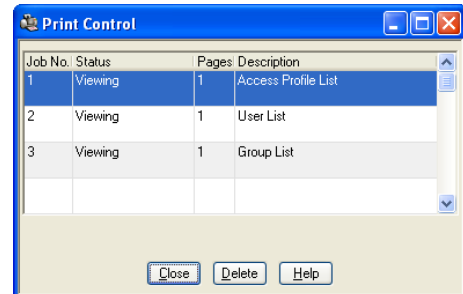


Fig. 3-9, Print Control Window

### 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 32*). 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.

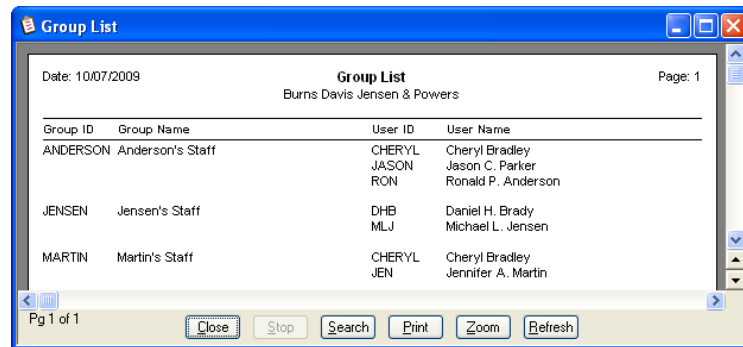


Fig. 3-10, Preview Window

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.

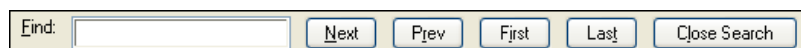


Fig. 3-11, Search Toolbar

- 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 37*).

---

**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.

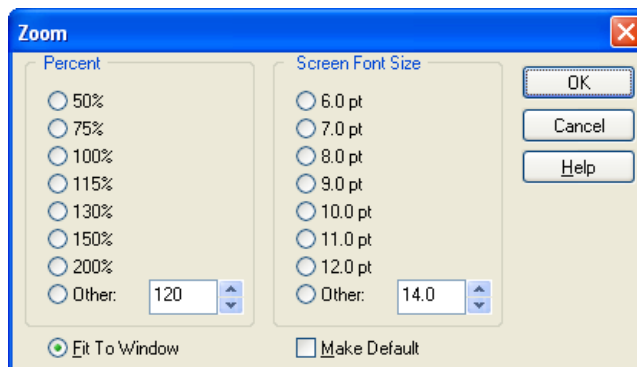


Fig. 3-12, Zoom dialog box

### 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 redisplay 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](http://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.



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

---

## DropBox Window

Whenever a Print dialog is displayed in Tabs3/PracticeMaster software (*page 32*), 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.

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.

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, Initials, User Name, E-mail Address, and whether the user is integrated with Outlook or GroupWise. 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 54.

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 ID	User Name	Verification ID	Logon User	Access 1	Access 2	Access 3	Access 4	Access 5	
Initials	E-mail Address	Integration		Calendar Access Rights					
CHERYL	Cheryl J. Bradley cbradley@burnsjensen.com	0001 Outlook	Yes	MANAGER Robert Julie	Edit Edit	Public Public	Browse Browse	Private Private	Edit Edit
ROBERT	Robert J. Burns rburns@burnsjensen.com	0002 Outlook	Yes	MANAGER Cheryl Julie Billy	Edit Edit Edit	Public Public Public	Browse Browse Browse	Private Private Private	Edit Edit Edit
BILLY	Billy Jo Atkins batkins@burnsjensen.com Timekeepers: 2 Paula A. Madison 5 Julie P. Powers	0003 Outlook	Yes	VIEWONLY Robert Julie	TAS Edit Edit	PMCAL Public Public			
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 56.

<u>Access ID</u>	<u>Name</u>	<u>Software Access</u>					<u>System Configuration Access</u>			
		<u>T3</u>	<u>PM</u>	<u>GL</u>	<u>TR</u>	<u>AP</u>	<u>User</u>	<u>Firm</u>	<u>Group</u>	<u>Active</u>
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 e-mail, 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 55.

<u>Group ID</u>	<u>Group Name</u>	<u>User ID</u>	<u>User Name</u>
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

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# Appendixes

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	<b>Page #</b>
□ Appendix A Technical Support . . . . .	43
□ Appendix B Glossary . . . . .	45
□ Appendix C Startup Options . . . . .	49

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# Appendix A

## Technical Support

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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 60 days. After 60 days, 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](http://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.

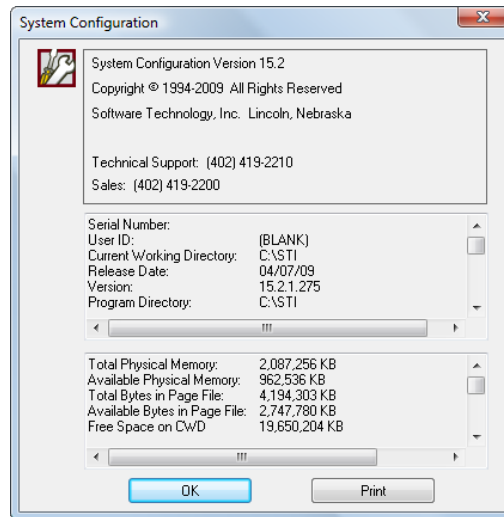


Fig. A-1, About System Configuration

# 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.

**Client Server Version** The Client Server Version (CSV) of Tabs3 and PracticeMaster software is designed specifically to meet the needs of firms with multiple users accessing the software at the same time. CSV software offers additional features including Auto-Recovery, HotBackup, and Software Accelerators; all of which work together to enhance the overall usability, performance and reliability of the software. PracticeMaster Premier CSV software also includes eNote, an intra-office messaging feature.

**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).

**CSV** *See Client Server Version*

**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.

**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 Client Server Version (CSV) 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](http://www.adobe.com).

**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, Novell GroupWise, Palm OS® compatible Handhelds, 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 Overtyping 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.

**STL.INI file** The STL.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.

**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 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 Windows 98 and later systems. 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

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 37*). 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.

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## 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**



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# Sample Reports

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## Table of Contents

User List ..... 54  
Group List ..... 55  
Access Profile List ..... 56

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### Optional Report Footer

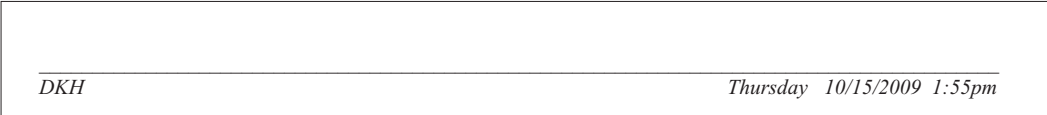
Footer

- Print Footer
- Print User Initials
- Print Horizontal Ruling Line

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.



## User List

The User List shows the User ID, User Name and e-mail address, verification ID, and whether the user is configured for Outlook or GroupWise integration (when integrating with PracticeMaster). 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: 11/17/2009		<b>User List</b>				Page: 1				
Burns, Jensen & Powers, P.C.										
User ID	User Name E-mail Address	Verification ID Integration	Logon User	Access 1	Access 2	Access 3 Calendar Access Rights	Access 4	Access 5		
CAMERA	Video Camera	0067	No							
CONF	Conference Room	0068	No							
DANIEL	Daniel H. Brady DBrady@burnsjensen.com	0055 GroupWise	Yes	MANAGER JASON PAULA ROBERT	Edit Public Edit Public Edit Public	Browse Private Browse Private Browse Private		Edit Private Edit Private		
DEFAULT	Default User	0054	Yes	MANAGER						
JACK	Jack P. Ryan JRyan@burnsjensen.com	0070	Yes	GL-ALL ROBERT	PM-ALL Edit Public	T3-ALL				
	Timekeepers:	1 Robert J. Burns 3 Paula A. Madison 5 Julie P. Powers								
JASON	Jason C. Parker JParker@burnsjensen.com	0056 GroupWise	Yes	MANAGER ROBERT PAULA JULIE DANIEL	Edit Public Edit Public Edit Public Edit Public	Browse Private Browse Private Browse Private Browse Private				
JULIE	Julie P. Powers JPowers@burnsjensen.com	0057	Yes	MANAGER JASON	Edit Public	Browse Private				
LAJRA	Laura E. Baylor LBaylor@burnsjensen.com	0075 Outlook	Yes	PM-CAL JACK	T3-ALL Edit Public	TR-ALL Browse Private				
MICHAEL	Michael L. Jensen MJensen@burnsjensen.com	0058	Yes	MANAGER JASON	Edit Public	Browse Private				
NANCY	Nancy E. Hill NHill@burnsjensen.com	0076	Yes	AP-VIEW	GL-VIEW	T3-ALL	TR-ALL			
	Timekeepers:	2 Michael L. Jensen								

## Definitions

<b>Date</b>	The date the list was printed.
<b>User ID</b>	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.
<b>User Name</b>	The user's name. The User Name is included on verification lists and is shown in the Active User List when it is displayed.
<b>E-mail Address</b>	The user's e-mail address. The e-mail address is used with PracticeMaster's Send E-mail function.
<b>Verification ID</b>	The Verification ID is a four-digit number that is internally assigned to each user. The Verification ID is used internally.
<b>Integration</b>	The text "Outlook" or "GroupWise" in this column indicates the user is configured to integrate with Outlook or GroupWise when integrating with PracticeMaster. This area is left blank if PracticeMaster is not installed <i>or</i> the user is not configured to integrate with Outlook or GroupWise.
<b>Logon User</b>	A <b>Yes</b> 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.
<b>Access 1-5</b>	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)

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### 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.

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## Group List

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

Date: 11/17/2009		Group List		Page: 1
		Burns, Jensen & Powers, P.C.		
Group ID	Group Name	User ID	User Name	
BILLING	Billing Staff	JACK JASON LAURA NANCY	Jack P. Ryan Jason C. Parker Laura E. Baylor Nancy E. Hill	
BOOK	Bookkeeping Staff	JACK LAURA NANCY SUSAN	Jack P. Ryan Laura E. Baylor Nancy E. Hill Susan C. Long	
STAFF	All Staff	DANIEL JACK JASON JULIE LAURA MICHAEL NANCY PAULA ROBERT SUSAN	Daniel H. Brady Jack P. Ryan Jason C. Parker Julie P. Powers Laura E. Baylor Michael L. Jensen Nancy E. Hill Paula A. Madison Robert J. Burns Susan C. Long	
TIMEKPRS	Timekeepers	DANIEL JULIE MICHAEL PAULA ROBERT	Daniel H. Brady Julie P. Powers Michael L. Jensen Paula A. Madison Robert J. Burns	

---

## 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 R10873 "Access Rights" ([www.support.Tabs3.com](http://www.support.Tabs3.com)).

Date: 11/17/2009		Access Profile List								Page: 1			
Burns, Jensen & Powers, P.C.													
Access ID	Name	Software Access				System Configuration Access							
		T3	PM	GL	TR	AP	User	Firm	Group	Active			
ALL	Access to all systems	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y		
AP-ALL	Access to all APS programs	N	N	N	N	Y	N	Y	N	Y	Y		
AP-VIEW	View APS Information	N	N	N	N	Y	N	N	N	N	Y		
DATA	Data Entry	Y	Y	Y	Y	Y	N	N	N	N	N		
GL-ALL	Access to all GLS programs	N	N	Y	N	N	N	Y	N	N	Y		
GL-VIEW	View GLS information	N	N	Y	N	N	N	N	N	N	Y		
PM-ALL	Access to all PM programs	Y	Y	N	N	N	N	N	N	N	Y		
PM-CAL	Access to PM Calendar	N	Y	N	N	N	N	N	N	N	Y		
PM-VIEW	View PM information	N	Y	N	N	N	N	N	N	N	N		
T3-ALL	Access to all Tabs3 programs	Y	N	N	N	N	N	N	Y	N	Y		
T3-VIEW	View Tabs3 information	Y	N	N	N	N	N	N	N	N	Y		
TR-ALL	Access to all TAS programs	N	N	N	Y	N	N	N	Y	N	Y		
TR-VIEW	View TAS information	N	N	N	Y	N	N	N	N	N	Y		

Date: 11/17/2009		Access Profile List								Page: 1						
Burns, Jensen & Powers, P.C.																
Access ID	Name	Software Access				System Configuration Access										
		T3	PM	GL	TR	AP	User	Firm	Group	Active						
DATA	Data Entry	Y	Y	Y	Y	Y	N	N	N	N	N					
Tabs3 Access Rights																
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
1)	Y	Y	Y	N	Y	Y	Y	Y	Y	N						
2)	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	
3)	N	Y	N	Y	Y	N	N	N	N							
4)	N	Y	Y	Y	Y	Y	N	Y								
5)	Y	Y	Y	Y	N	N	N									
6)	Y	Y	Y	Y	N	N	N	Y	N	N	Y	Y	N	Y	N	
7)	N	N	N	Y	N	N	Y									
8)	N	Y	Y	N	N	N	N	N	Y							
9)	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y		
10)	N	N	N	N	N	N	N	Y	Y	Y	N	Y				
11)	N	N	N	N	N	N	Y	N	N							
12)	Y	Y	Y	Y	Y	N										
13)	N	N	N	N	Y	N	Y	N	Y							
14)	Y	N	N	Y	Y	N	N	N	Y	Y						
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 Client Funds															
	• 8) Add Client Funds															
	• 9) Change Client Funds															
	• 10) Delete Client Funds															

## 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.

# Index

## !

1099 Forms ..... 23

## A

About System Config ..... 9, 44  
Accelerator Technology ..... 11  
access profile  
    definition ..... 45  
Access Profile List ..... 40  
access profiles  
    Access Profile File ..... 21  
    Access Profile List ..... 40  
access rights ..... 6, 45  
Accounts Payable Software ..... 45  
Active User List ..... 5, 45  
Advanced Printing Features ..... 28  
APS ..... 45  
ASCII ..... 45  
assign Tabs3/PM timekeepers ..... 21  
autofill ..... 19  
automatic error reporting ..... 9  
automatic font selection ..... 27  
Auto-Recovery ..... 11

## B

back up ..... 10, 45  
    HotBackup ..... 11  
Back Up Data Files program ..... 10  
base font ..... 27  
blank User ID ..... 21  
bottom margin ..... 26  
buttons  
    toolbar ..... 17  
byte ..... 45

## C

Client Server Versions ..... 11  
clipboard ..... 45

Copy from List ..... 23  
command line option ..... 49  
commas on reports ..... 28  
company name ..... 23  
configuring a printer for print-to-file output ..... 33  
conventions  
    manual ..... 2  
    program ..... 2  
CSV ..... 11  
current working directory ..... 9  
customer support ..... 43

## D

data entry ..... 19  
data files ..... 11  
default printer ..... 25  
deleting records ..... 24  
Diagnostics ..... 13  
disk file ..... 32  
displaying a report ..... 35  
Drill-Down Capabilities ..... 36  
DropBox ..... 32, 37

## E

eNote ..... 12  
error log ..... 9  
error messages  
    *Refer to Help*  
error submission configuration ..... 9  
Excel ..... 23  
    file type ..... 32  
    remove formatting ..... 29  
exclusive function ..... 6  
exiting the software ..... 6

## F

Federal ID # ..... 1, 23  
file  
    data files ..... 11  
    saving a report to a file ..... 32

*Can't find your topic? Try the System Configuration Help Index.*

Firm Information . . . . .	23
Font Selection Mode . . . . .	27
fonts	
base font . . . . .	27
font selection mode . . . . .	27
footer on reports . . . . .	28, 53

## G

General Ledger Software . . . . .	46
glossary . . . . .	45
GLS . . . . .	46
gray text and shading on reports . . . . .	28
Group List . . . . .	40
groups	
assigning to users . . . . .	19
Group File . . . . .	22
Group List . . . . .	40
GroupWise . . . . .	20

## H

hard disk space requirements . . . . .	2
hardware requirements . . . . .	2
Help Topics . . . . .	8
HotBackup . . . . .	11
HTML	
saving a report as HTML . . . . .	32

## I

icons . . . . .	17
inactive user . . . . .	21, 46
incremental searching . . . . .	19
initial file set-up . . . . .	7
installing . . . . .	2
Internet Resources . . . . .	8

## K

keystrokes	
Preview window . . . . .	37
text editing . . . . .	18
Windows . . . . .	18
Knowledge Base . . . . .	8

## L

left margin . . . . .	26
License Notice . . . . .	9
Lock Out All Users . . . . .	7
Log Files . . . . .	9

logging into the software . . . . .	3
logon dialog box . . . . .	3
long file name . . . . .	46
Lookup windows . . . . .	19

## M

main application window . . . . .	4
Maintenance Plan . . . . .	43
Manager . . . . .	3, 5 - 6, 21
manual font selection . . . . .	27
margins . . . . .	26
maximized Windows . . . . .	4
memory . . . . .	2, 44
menu	
System Configuration . . . . .	15
Microsoft Excel . . . . .	23
Microsoft Word . . . . .	23
mouse . . . . .	2
multi-access function . . . . .	6
multiple document interface . . . . .	2
multi-user version . . . . .	6

## N

network . . . . .	2
Network Settings . . . . .	13
Network Test . . . . .	13

## O

open windows maximized . . . . .	4
optimize for print to file . . . . .	28
orientation (paper size) . . . . .	26
Outlook . . . . .	20

## P

Page Setup . . . . .	26
paper size . . . . .	26
password . . . . .	3, 6, 21
PDF file . . . . .	32, 37
definition . . . . .	46
PM . . . . .	46
pointer . . . . .	46
PracticeMaster . . . . .	46
PracticeMaster Briefcase . . . . .	47
preferences	
open windows maximized . . . . .	4
print setup . . . . .	25
status bar . . . . .	4
toolbar . . . . .	4
preview	
keystrokes . . . . .	37

*Can't find your topic? Try the System Configuration Help Index.*



option	34
Preview Window	35
Print Control Window	34
Print Dialog Box	31
previewing a report	34
printing a report	31
saving a report to a disk file	32
Print Setup	25
Printer Offset Adjustment	26
printers	
configuring for print-to-file output	33
default printer	25
where to configure	25
printing	
a report	31
Print Control Window	34
Print Dialog box	31
print job	47
print queue	34
Print Setup	25
to a file	33
program directory	44
program group	3

## Q

queue	
print	34
QuickDates	47
quitting the software	6

## R

Reassign User ID	13
red negative numbers on reports	28
Refresh	36
Reindex Files	12
release date	9
Rename User ID	12
report printer	
<i>See</i> Printer Setup	
report width	27
reports	
Access Profile List	40
Group List	40
User List	39
requirements	2
reset log	10
reset user profile	21
resetting users	5
restore	47
Restore Data Files program	10
Restore HotBackup	11
right margin	26
rights	6

## S

saving a report to a file	32
searching	
Preview Window	35
second session	3
security	6, 21
serial number	
where to find	44
single access function	6
starting System Configuration	3
startup options	49
status bar	4
STI.INI file	47
Submit Log Files	9
super exclusive function	6
support	43
support log	9
System Configuration	47
data files	11
menu	15
system date	47
system requirements	2
system security	6
system time	4
system tray	47

## T

Tabs3	47
Tabs3 Financial Software	47
Tabs3 Report Writer	47
Tabs3/PM timekeepers	21
TAS	48
taskbar	48
technical support	43
telephone support	43
text editing keystrokes	18
time	4
timekeeper definition	48
timekeepers	21
title bar	48
toolbar	4
toolbar buttons	17
top margin	26
Transaction Processing	11
troubleshooting	25
<i>Refer to</i> Help	
TrueType fonts	48
Trust Accounting Software	48
TXT file	
saving a report as TXT	33

## U

User ID	3, 44, 48
User List	39
user profile	48

Can't find your topic? Try the System Configuration Help Index.

user/password dialog box .....	3, 49
users	
resetting .....	5
User File .....	19
User List .....	39

## V

verification list .....	48
version number .....	9, 44
viewing a report .....	35
Vista .....	2

## W

Web site .....	8
What's New List .....	8
width	

report .....	27
Windows directory .....	44
Windows printer .....	31
Windows version .....	44
working directory .....	9
workstation installation .....	2

## X

XLSX (XLS) .....	32
saving a report as XLSX (XLS) .....	32

## Z

zoom .....	36
------------	----

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