

shelby

v.5

User Guide

The Shelby Community

Updated: 11/7/2012

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What is the Shelby Community?

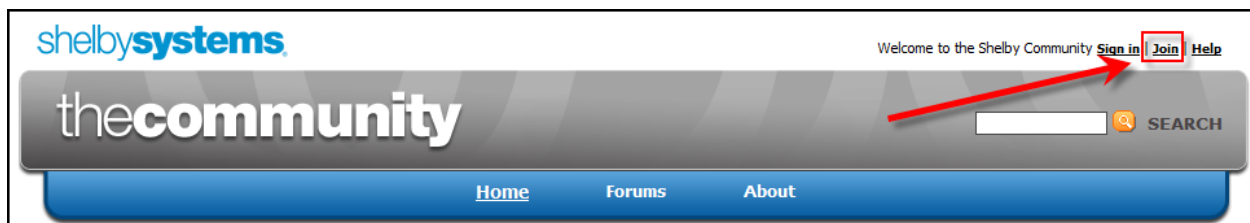
The Shelby Community is a place where the whole family of Shelby Systems users can connect. It is a place to ask questions, express opinions, and share ideas about Shelby Systems solutions. The Community is here to help you and other Shelby Systems customers learn from one another.

Why should I join the Shelby Community?

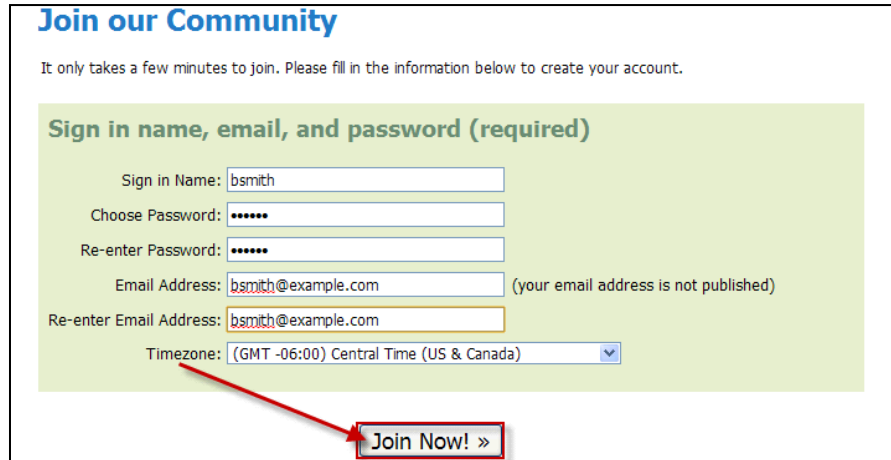
- Be among the first to hear about important announcements.
- Connect with other Shelby v.5 users in the Community so you can learn from each other.
- Find answers to your questions in the **Knowledge Base**.
- Free access to **SSTips** for How-To procedures and helpful tips and tricks.
- Free access to the **ShelbyPROFESSOR** interactive online training courses.
- Quickly find what you are looking for in the **Resource Center**.
- Download custom queries, drivers and other files.
- Receive automatic notification about the forums to which you are subscribed.
- Stay connected. Stay informed.

How do I join the Shelby Community?

Joining the Shelby Community is simple. Go to <http://community.shelbyinc.com> to start the registration process. Once there, click the **Join** link at the top right of the page.



Fill out the form with your desired **Sign in Name** (user name), **Password**, **Email Address**, and your **Time Zone**. You can then click the **Join Now** button.



Join our Community

It only takes a few minutes to join. Please fill in the information below to create your account.

Sign in name, email, and password (required)

Sign in Name:

Choose Password:

Re-enter Password:

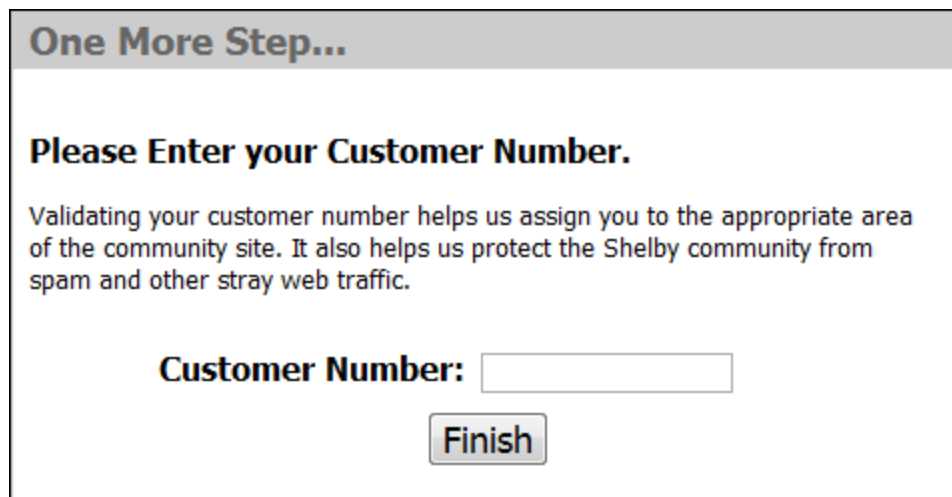
Email Address: (your email address is not published)

Re-enter Email Address:

Timezone:

Join Now! »

You will then come to a screen prompting you for your Shelby Systems **Customer Number**. Input your five-digit number into the field provided then click the **Finish** button.



One More Step...

Please Enter your Customer Number.

Validating your customer number helps us assign you to the appropriate area of the community site. It also helps us protect the Shelby community from spam and other stray web traffic.

Customer Number:

Finish

As long as you have entered a valid customer number and are active on Support, you will receive visual confirmation that your account has been activated. You can then sign in to the Shelby Community immediately.



Welcome to the Shelby Community...

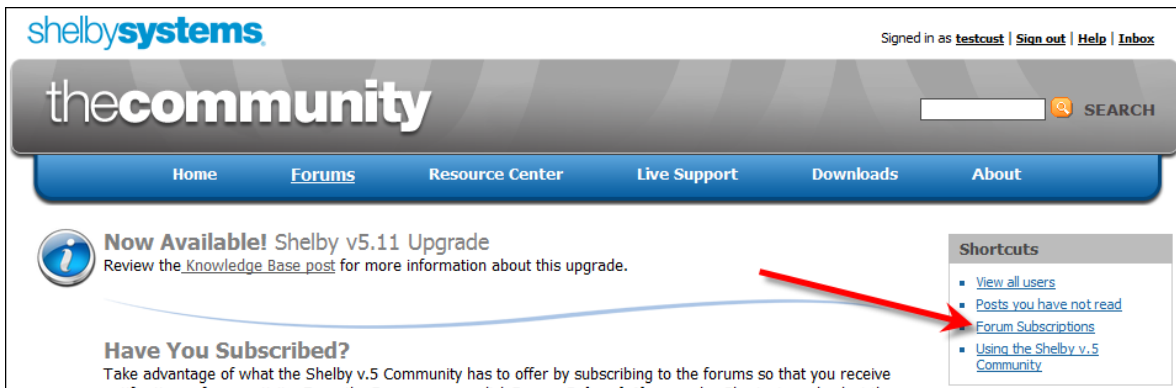
Your customer number has been approved for access to the Shelby Community. Please sign in below.

Keeping up to date with the Shelby Community

Once you join the Shelby Community, the next step is keeping up with new posts. Both **RSS Feeds** and **Forum Subscriptions** can be used to receive posted notifications. Follow the steps below to sign up for either, and do not forget to check out the **Helpful Links** section at the end of this document.

Manage Forum Subscriptions

If you prefer email notifications, then the Shelby Community has a built-in feature called **Forum Subscriptions** available on the right of your screen in the **Shortcuts** box.



Click this link and you will get a list of all of the available forums to which you can subscribe. Place checks next to each forum you want to be notified about and then click the **Save** button at the bottom left of the screen. You will then be notified when a new post or reply appears in the selected forums. At any time, you can return to the **Forum Subscriptions** area to change your subscribed forums.

User Community	
Forum	Subscribe
Accounts Payable Ask questions, get answers, and share ideas on Accounts Payable.	<input checked="" type="checkbox"/>
Accounts Receivable Ask questions, get answers, and share ideas on Accounts Receivable.	<input checked="" type="checkbox"/>
Bank Reconciliation Ask questions, get answers, and share ideas on Bank Reconciliation.	<input checked="" type="checkbox"/>
Attendance Ask questions, get answers, and share ideas on Attendance.	<input checked="" type="checkbox"/>
Check-In Ask questions, get answers, and share ideas on Check-In.	<input checked="" type="checkbox"/>
Contributions Ask questions, get answers, and share ideas on Contributions.	<input checked="" type="checkbox"/>
General Ledger Ask questions, get answers, and share ideas on General Ledger.	<input checked="" type="checkbox"/>
e-Solutions Ask questions, get answers, and share ideas on any of the e-Solutions modules.	<input checked="" type="checkbox"/>
GlobaFILE Ask questions, get answers, and share ideas on GlobaFILE.	<input checked="" type="checkbox"/>
Membership Ask questions, get answers, and share ideas on Membership.	<input checked="" type="checkbox"/>
Payroll Ask questions, get answers, and share ideas on Payroll	<input checked="" type="checkbox"/>
Registrations Ask questions, get answers, and share ideas on Registrations.	<input checked="" type="checkbox"/>
Purchase Order Ask questions, get answers, and share ideas on Purchase Order.	<input checked="" type="checkbox"/>
Resource Calendar Ask questions, get answers, and share ideas on Resource Calendar.	<input checked="" type="checkbox"/>
Servant Ask questions, get answers, and share ideas on Servant.	<input checked="" type="checkbox"/>
Shelby Add-ons Talk about products and services from Shelby Systems business partners.	<input checked="" type="checkbox"/>
ShelbyHQ Ask questions, get answers, and share ideas on the ShelbyHQ family of products	<input checked="" type="checkbox"/>
ShelbyQUERY Ask questions, get answers, and share ideas on ShelbyQUERY.	<input checked="" type="checkbox"/>
ShelbyIT Ask questions, get answers, and share ideas with other IT, Network, and Database professionals	<input checked="" type="checkbox"/>
International Shelby Conference Connect with others interested in sharing information and ideas on International Shelby Conference	<input checked="" type="checkbox"/>
Other Ask questions, get answers, and share ideas on other topics.	<input type="checkbox"/>
ShelbyTELLER Ask questions, get answers, and share ideas on ShelbyTELLER.	<input checked="" type="checkbox"/>
<input type="button" value="Save"/>	

RSS Feeds

RSS Feeds are tracked by the use of a feed reader or aggregator. For more information on these, see the **Helpful Links** section. To get the RSS feed for any forum, follow these steps:

1. Click on a Forum and scroll to the bottom of the page.
2. Look for the **RSS Available** icon.

Note: The appearance of this icon will depend on the browser with which you are accessing the Community.



3. Either left-click this icon, or right-click and copy its location/shortcut. You can then paste that into the RSS reader of your choice.
 - a. If you are using Firefox, the browser will ask you which reader you want to use the RSS feed with when you left-click the icon.
 - b. If you are using the latest version of Internet Explorer, it will ask you to add the feed to Internet Explorer's integrated RSS reader.
4. Repeat this process for any other forum that you wish to subscribe to using RSS.

Keeping up with the Shelby Community is easy using **Forum Subscriptions** or **RSS Feeds**.



How do I use the Shelby Community?

Once you have joined the Community and your account is approved, you can log in anytime. Once logged in, you can fully utilize everything the Community has to offer. We will go over some of the key areas of the Community below.

User Community Forums

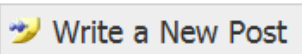
One of the key reasons to join the Shelby Community is the ability to network with other Shelby Systems users. You can share opinions, ask and answer questions, and communicate with each other. There are User Community forums for all of the Shelby v.5 financial and church modules, as well as forums for Shelby Add-ons, ShelbyHQ, and ShelbyIT. In addition, there is a Miscellaneous forum and a forum for the International Shelby Conference. Shelby Systems technical support staff monitor the User Community forums and respond as appropriate.



The User Community section of forums is the heart of the Shelby Community. There are several individual forums, broken up by the area of Shelby Systems that you wish to discuss. Click on the forum link to access the posts within.



User Community				
	Forums	Last Post	Threads	Posts
	Accounts Payable Ask questions, get answers, and share ideas on Accounts Payable.	Re: Check Register by robert.avery 09-23-2010 4:23 PM	13	34
	Accounts Receivable Ask questions, get answers, and share ideas on Accounts Receivable.	Re: Correcting a double r... by Josh.Flippen 07-02-2010 4:19 PM	8	14

Once inside a Forum, click any post link to view the details or click the **Write a New Post** button to start your own.

Accounts Payable

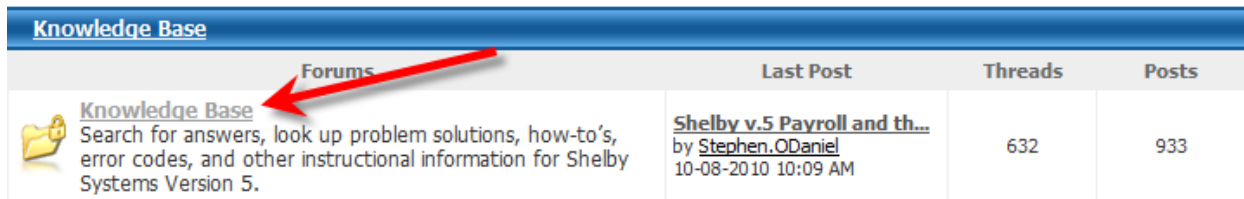
 **Write a New Post** OR


Topics		
	Thread	Replies
	Check Register Last reply by robert.avery , 09-23-2010 4:23 PM	2 

If you are viewing an existing post, you will use the  button if you wish to join the conversation. If you are creating a new post, you will be presented with a rich text editor window. After composing your post, go to the **Preview** tab if you want to see what your post will look like. When ready to submit, click the  button.

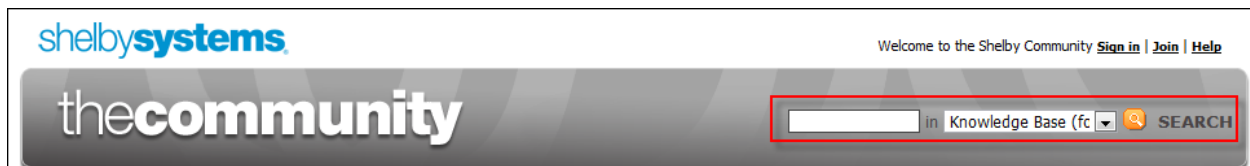
Knowledge Base Forums

The Knowledge Base is available twenty-four hours a day, seven days a week. You can find answers to ‘how-to’ questions, resolutions for error messages, as well as links to queries and downloads (such as drivers). In addition to the Knowledge Base forum itself, we also have the Year End Assistance forum. The Year End Assistance forum contains instruction and answers to year-end specific processes and questions. You can reach the **Knowledge Base** by clicking its forum link.




Knowledge Base				
Forums		Last Post	Threads	Posts
	Knowledge Base Search for answers, look up problem solutions, how-to's, error codes, and other instructional information for Shelby Systems Version 5.	Shelby v.5 Payroll and th... by Stephen.ODaniel 10-08-2010 10:09 AM	632	933

You will see the posts displayed, and can either browse through them or use the **Search** option at the top right of your screen.



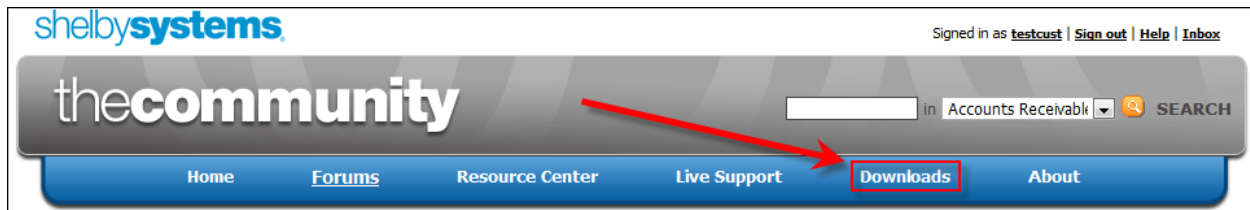
If you are going to use the search feature, enter the word or words that you would like to search for into the field provided. You can then click the **Search** button.

Note: Please keep in mind that if you search for more than one word, it is considered an ‘**And**’ search. In other words, searching for **error** and **3631** would only give you results that contained both of these terms.


When the search results come up, look through them and click the item that best matches what you are looking for. Once it is on the screen, look at the bottom left of the post. If you see a  button, go ahead and click it. This will ensure that you are looking at the complete post with all replies.

Downloads


The Downloads section enables you to locate queries, drivers, and other files easily. To access the **Downloads** area, click the link at the top of the Community page after signing in.





Once on the downloads page, you can browse the list of files or use the **Browse Folders** area on the left to select a folder. The contents of the selected folder will then display. Click any item in the list to get more information about the download. You can then click the **Download** button (or right-click and select 'save as') to download the file.




Registrations Custom Fields

 Download

 Enable Email Subscription

 Favorites ▾

 Contact ▾

File Details			
Downloads:	60	File Size:	2kB
Posted By:	Stephen.ODaniel	Views:	188
Date Added:	07-07-2009		

The RGCustomFieldsView file creates a "view" similar to the VIEW_SHELBY_CUSTINFO_ALL that has been available for GlobaFILE custom fields for a long time. This view is for Registrations custom fields, however. It works in conjunction with the existing Registrations (RG) tables using the following "key" column relationships:

EventCounter **joins to** RGEvent.Counter
 RegistrantCounter **joins to** RGReg.Counter
 AttendeeCounter **joins to** RGRegCatInd.Counter

Resource Center

The Resource Center is an extension of the Shelby Community that provides a common location where you can easily access a variety of resources that enable you to use the Shelby v.5 software more effectively. Some of these resources are available in other locations and some are only found in the Community. Use the Resource Center as your starting point for locating the information you seek. Resources include user guides, tutorials, updates and release notes, live online support, and training opportunities. With the Shelby Community Resource Center, the information you need is never far away.

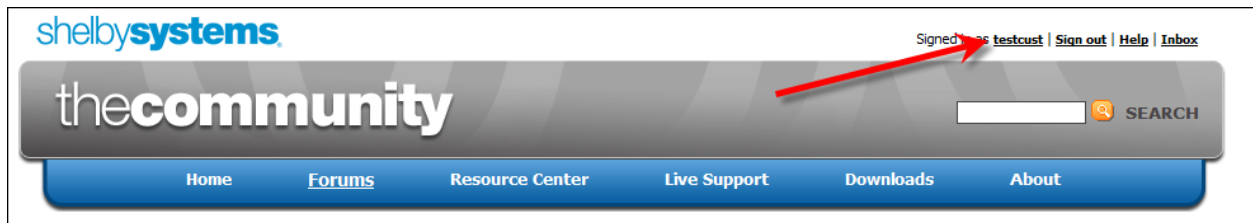
Resource Center

The Resource Center is a collection of helpful tools to assist you in using the Shelby products. In the Resource Center you will find training videos, user guides, how-to documents and much more. Simply click on the icon beside the area you want to explore.

 Knowledge Base Find answers to your questions 24/7.	 SSTips How To procedures and helpful tips and tricks.
 Live Online Support Chat live with a Support Representative and quickly obtain the answers you need.	 ShelbyPROFESSORS Online computer based training. Learn at your own pace.
 Tutorials Videos demonstrating and using features in Shelby v.5.	 Supplemental Documents These documents provide additional assistance in using particular products, or performing specific tasks.
 User Guides Shelby v.5 documentation for each application.	 Updates And Release Notes Find out what updates and patches are available? Review the most recent changes and software enhancements.
 Hardware Requirements Stay up to date with the latest system and hardware requirements.	 ShelbyPODCAST A monthly program designed to entertain, enlighten, and inform.
 Training Opportunities Choose the training option that is right for you.	 Product Information Learn about products that can help enhance the way you do ministry.
 International Shelby Conference A time of fun, fellowship, and learning opportunities. Don't miss this annual event.	

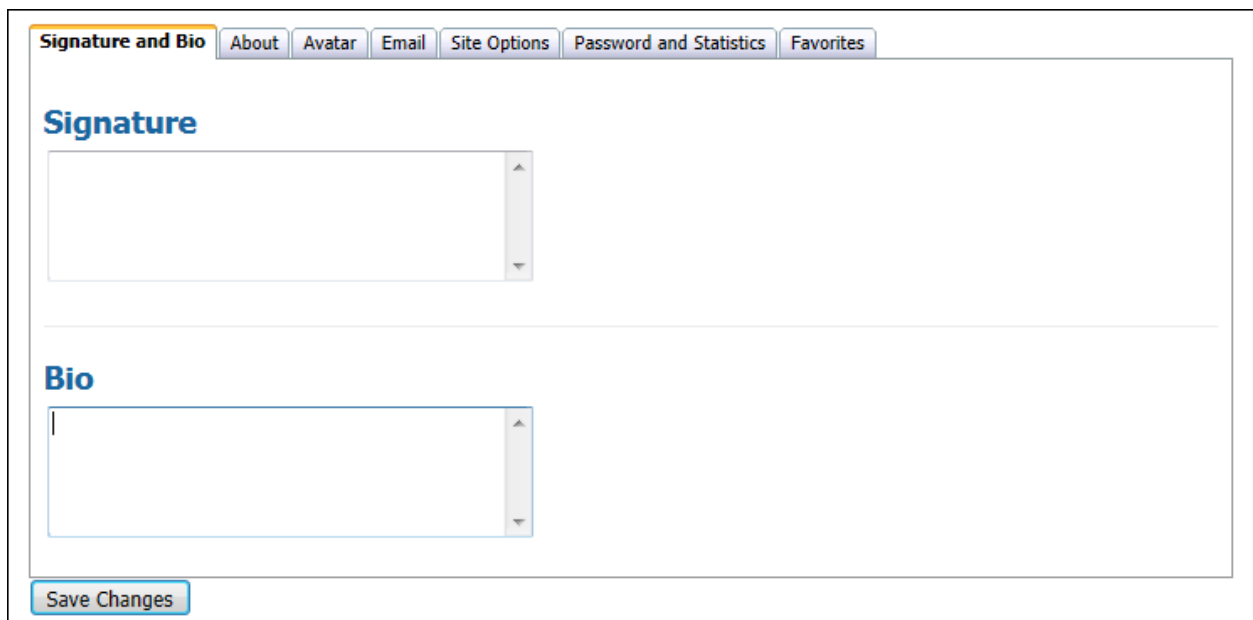
Personal Profile

By clicking the username link at the top of the page, you can access an area of the Shelby Community where you can edit your profile.



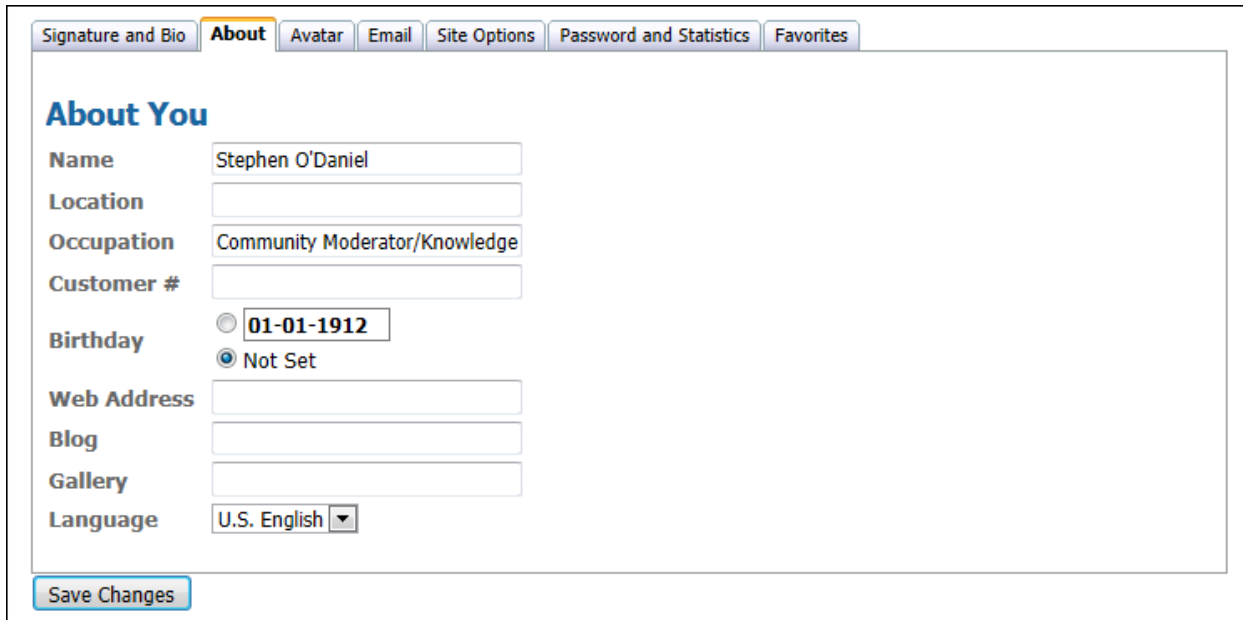
Signature and Bio Tab

The Signature and Bio tab allows you to set up a **Signature** that appears within forum posts as well as a **Bio** that can be viewed by clicking on your profile.



About Tab

The About tab is used to store information about yourself. The **Customer #** field will contain the customer number that you put in when joining the Shelby Community. If the number shown in this field is not correct, contact Shelby v.5 support.



The screenshot shows a user profile management interface with several tabs: Signature and Bio, About (selected), Avatar, Email, Site Options, Password and Statistics, and Favorites. The 'About You' section contains the following fields:

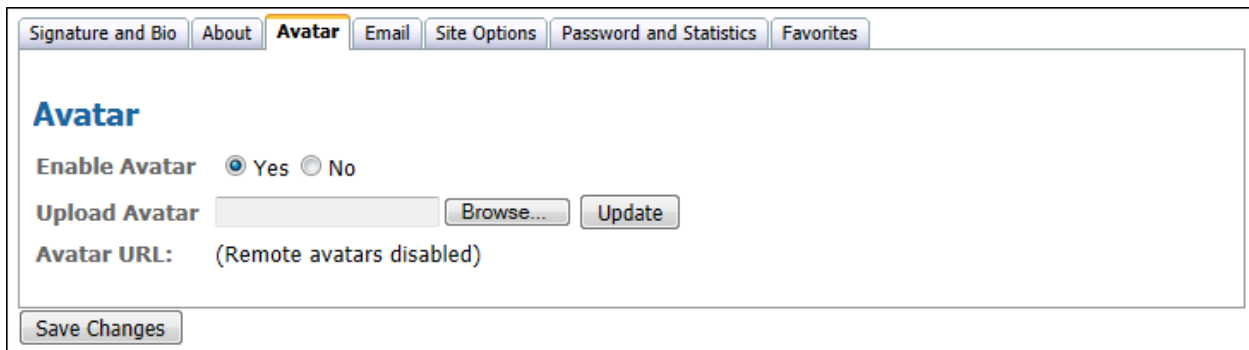
- Name:** Stephen O'Daniel
- Location:** (empty text box)
- Occupation:** Community Moderator/Knowledge
- Customer #:** (empty text box)
- Birthday:** Radio buttons for 01-01-1912 and Not Set
- Web Address:** (empty text box)
- Blog:** (empty text box)
- Gallery:** (empty text box)
- Language:** U.S. English (dropdown menu)

A 'Save Changes' button is located at the bottom left of the form.

Avatar Tab

On the Avatar tab you can upload an image that represents your username on the Shelby Community. Use the **Browse** button to select the image you wish to use as your avatar. Once selected, click **Update** to set your avatar. It will take up to ten minutes to appear.

Note: Images are resized for best viewing.



The screenshot shows the 'Avatar' tab selected in the user profile management interface. The 'Avatar' section contains the following options:

- Enable Avatar:** Radio buttons for Yes and No
- Upload Avatar:** A text box, a 'Browse...' button, and an 'Update' button
- Avatar URL:** (Remote avatars disabled)

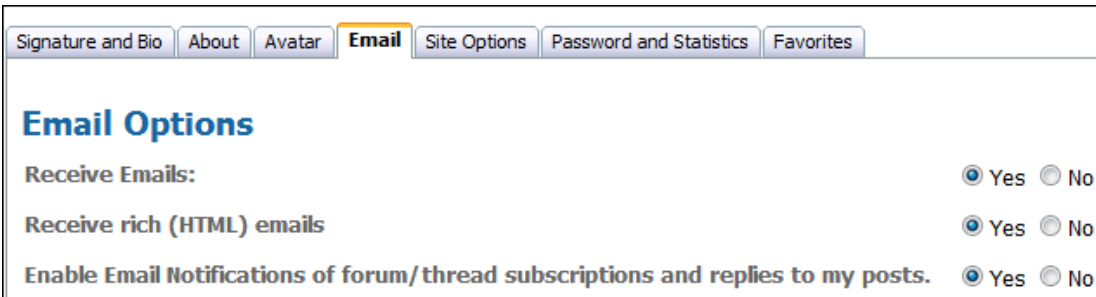
A 'Save Changes' button is located at the bottom left of the form.

Email Tab

The email tab allows you to set email notification preferences. You can also specify a publically visible email address, instant messenger handles, and change your contact email for the Shelby Community. After making whatever changes you like on this tab, please remember to click **Save Changes** at the bottom of the screen.

Email Options

The **Receive Emails** option allows you to receive emails from other users of the Shelby Community. The **Receive rich (HTML)** option lets you choose to have those emails sent either HTML or plain text. Finally, the **Enable Email Notifications of forum/thread subscriptions and replies to my posts** option lets you toggle notifications from your selected forum subscriptions.



Signature and Bio About Avatar **Email** Site Options Password and Statistics Favorites

Email Options

Receive Emails: Yes No

Receive rich (HTML) emails Yes No

Enable Email Notifications of forum/thread subscriptions and replies to my posts. Yes No

Public Contact Information (visible to all members)

This section allows you to specify a **Public Email** address that will be viewable by other members of the Shelby Community. You can also choose to share your **MSN IM**, **AOL IM**, **Yahoo IM**, and **ICQ** contact information.



Public Contact Information (visible to all members)

Public Email

MSN IM

AOL IM

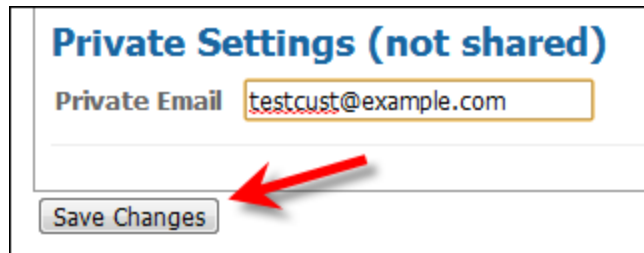
Yahoo IM

ICQ

Private Settings (not shared)

The **Private Email** field allows you to change your contact email for the Shelby Community. Notifications that you subscribe to such as forum subscriptions will be sent to this email address. Change the email address in this field to whatever you want it to be, then click the **Save Changes** button.

Note: Each user in the Shelby Community must have a unique email address (you cannot have the same email address assigned to more than one user).

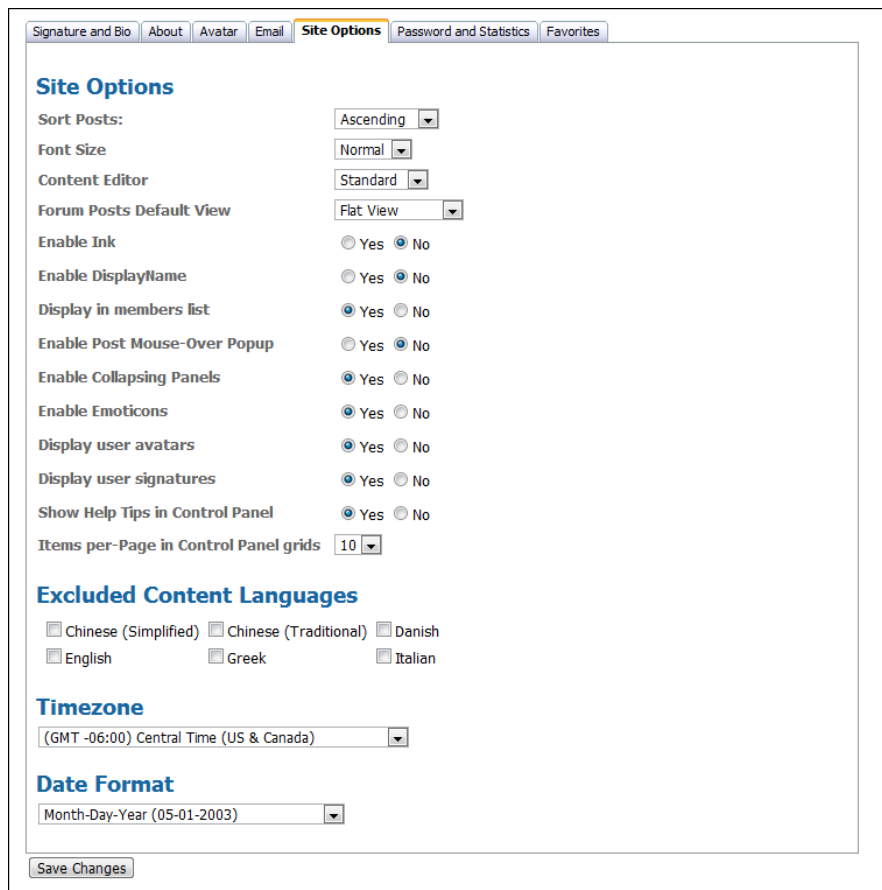


The screenshot shows a form titled "Private Settings (not shared)". It contains a text input field labeled "Private Email" with the value "testcust@example.com". Below the input field is a "Save Changes" button. A red arrow points to the "Save Changes" button.

Site Options Tab

The Site Options tab offers an assortment of general options relating to your use of the User Community forums. You can choose how posts are sorted, adjust the font size, etc. You can also change your Timezone and Date Format.

Note: Do not change the setting of the **Forum Posts Default View** as "Flat View" is the only supported format.



The screenshot shows the "Site Options" tab in a user settings interface. The "Site Options" section includes the following settings:

- Sort Posts: Ascending
- Font Size: Normal
- Content Editor: Standard
- Forum Posts Default View: Flat View
- Enable Ink: No
- Enable DisplayName: No
- Display in members list: Yes
- Enable Post Mouse-Over Popup: No
- Enable Collapsing Panels: Yes
- Enable Emoticons: Yes
- Display user avatars: Yes
- Display user signatures: Yes
- Show Help Tips in Control Panel: Yes
- Items per-Page in Control Panel grids: 10

The "Excluded Content Languages" section includes checkboxes for Chinese (Simplified), Chinese (Traditional), Danish, English, Greek, and Italian, all of which are currently unchecked.

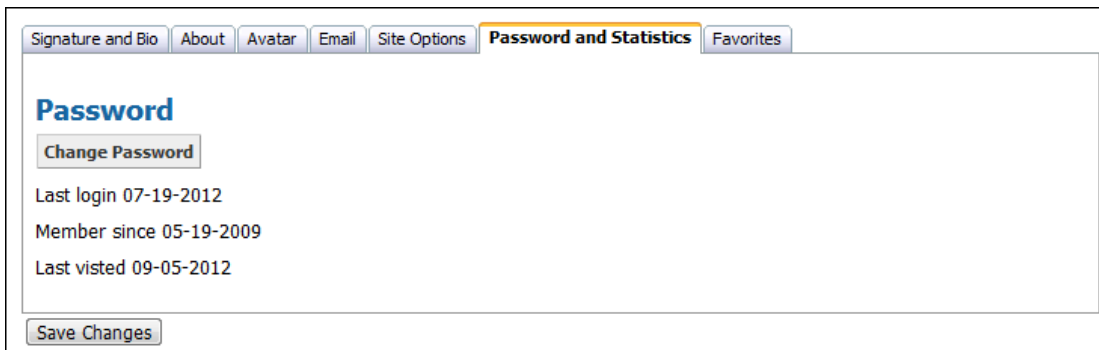
The "Timezone" section is set to "(GMT -06:00) Central Time (US & Canada)".

The "Date Format" section is set to "Month-Day-Year (05-01-2003)".

A "Save Changes" button is located at the bottom of the form.

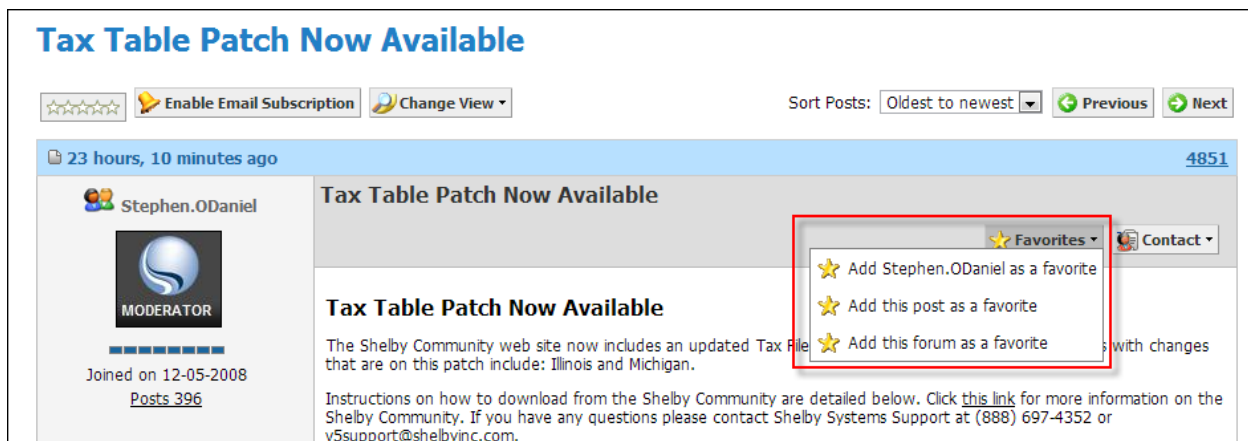
Password and Statistics Tab

The **Change Password** button allows you to change your password. This tab also displays information on your last login, and when your account was set up.



Favorites Tab

The Shelby Community allows you to mark your favorite users, posts, and sections. Items that you have added as a favorite show up here for easy access to them. To add a favorite, click the **Favorites** button while looking at a Forum post and select to favorite the user, post, or forum.



For each item on the **Favorites** tab you have the option to share your favorites. If you do not place a check in the box, your favorites in that section will remain private. If you do check one of the share options, make sure to click **Save Changes**. To remove a favorite, place a check next to it and click **Delete**. You can click the favorite link to go to that item.

Favorite Users

Users you have marked as favorites are listed in the order they were selected as such. You can click the **Username** link to access the shared profile of the user or click the icon under **Actions** to send a private message. The **Total Posts** and **Post Rank** of the user are also shown.

<input checked="" type="checkbox"/> Share Favorite Users				
Favorite Users				
	Username	Total Posts	Post Rank	Actions
<input type="checkbox"/>	Stephen.ODaniel	396	1	
<input type="checkbox"/>	Geoff.Johnson	271	1	
<input type="button" value="Delete"/>				

Users Watching You

If any users are watching you and have the **Share Favorite Users** option selected, you will see them listed here. You can click a name to access that user's shared profile or click the icon under **Actions** to send a private message. The **Total Posts** and **Post Rank** of the user are also shown.

Users Watching You			
Username	Total Posts	Post Rank	Actions
testcust	11	4	

Favorite Posts

Click the **Subject** link of any post to go there directly. The **Exerpt** field displays the first part of the post.

<input type="checkbox"/> Share Favorite Posts	
Favorite Posts	
Subject	Excerpt
<input type="checkbox"/> SSTip: Manually Update the Social Security Tax Rate	Overview: At the beginning of each new year Shelby Systems, Inc. provides you with the latest social security, Medicare and federal tax tables. Over the last couple of years this has become especially difficult due to varying social security rates. As
<input type="checkbox"/> Tax Table Patch Now Available	Tax Table Patch Now Available The Shelby Community web site now includes an updated Tax File Patch for version 5.11.6000 . The states with changes that are on this patch include: Illinois and Michigan. Instructions on how to download from the Shelby Community
<input type="button" value="Delete"/>	

Favorite Sections

Forums and Folders (downloads) that you have marked as favorites are listed here. You can click the **Name** link to go to the forum or download post directly.

Share Favorite Sections	
Favorite Sections	
Name	Description
<input type="checkbox"/> Forum: General Announcements	General Shelby Systems Announcements
<input type="checkbox"/> Forum: SSTips	The SSTips forum.
<input type="checkbox"/> Folder: v5.11.6000 Full	

Helpful Links

The link below may be of interest to you as a Shelby Systems customer. Any links provided are solely for your convenience and may assist you in locating other useful information on the Internet. When you click on any links you will be redirected to another site. These sites are not under the control of Shelby Systems. We are not an agent for these third parties nor do we endorse or guarantee their products. We make no representation or warranty regarding the accuracy of the information contained in the linked sites. We suggest that you always verify the information obtained from linked web sites before acting upon this information.

If you have any questions or concerns about the products and services offered on linked third party web sites, please contact the third party directly.

For more information on RSS Feed Readers/Feed Aggregators, access the [Wikipedia Article](#).