

Using ShelbyServices

ShelbyServices gives you the ability to schedule backups of your Shelby Systems database(s) through the Shelby SQL Backup-Restore Utility when using SQL Express. (**Note:** Other SQL versions will continue using the built in SQL Agent to schedule backups.) This utility also provides the ability to throttle e-mails sent through Shelby Systems software. Set rate controls in *ShelbyServices Monitor* to help avoid being flagged as a spammer by your Internet provider.

Assign Permissions:

Follow these steps to be able to access the ShelbyServices Monitor application.

1. Log into Shelby Systems with the **Supervisor** password.
2. Double-click the name of the person that you want to be able to use **ShelbyServices Monitor**.
3. Scroll to the bottom on the applications list and click **Shelby Services**.
4. Give **Update** rights for each item on the permissions list.
5. Click **OK**.
6. Click **Completed** to return to the main login window.

Configuration:

ShelbyServices gets logged on as a Local System service when first installed with the v5.9 update or following the creation of a new database when performing a new first time installation. In order to use the e-mail throttling feature, you will need to Log On to ShelbyServices with a user account that has administrative rights to all of your network locations. Follow the steps below that are appropriate to your environment.

Active Directory Domain Environment

1. Open **Control Panel**.
2. Open **Administrative Tools**.
3. Open **Services**.
4. Scroll down until you find **ShelbyServices** and double click to open.
5. From the ShelbyServices Properties screen, click the **Log On** tab.
6. Click the **This account** radio button.
7. Click the **Browse...** button.
8. Click the **Locations...** button and choose your Domain name and click **OK**.
9. From the Select User screen, click the **Advanced...** button.
10. Click the **Find Now** button and select the User Name to log on as. Click **OK**.
11. Verify the information is correct and click **OK**.
12. From the **ShelbyServices Properties** screen, type the **Password** and then the **Confirm password**.
13. Click **OK** when done.
14. Follow the prompts stop and restart the service and verify that the service is started.



Local/Workgroup Environment

1. Open **Control Panel**.
2. Open **Administrative Tools**.
3. Open **Services**.
4. Scroll down until you find **ShelbyServices** and double click to open.
5. From the ShelbyServices Properties screen, click the **Log On** tab.
6. Click the **This account** radio button.
7. Click the **Browse...** button.
8. From the Select User screen, click the **Advanced...** button.
9. Click the **Find Now** button and select the User Name to log on as. Click **OK**.
10. Verify the information is correct and click **OK**.
11. From the **ShelbyServices Properties** screen, type the **Password** and then the **Confirm password**.
12. Click **OK** when done.
13. Follow the prompts stop and restart the service and verify that the service is started.

ShelbyServices Monitor

Settings:

You must be logged on to the SQL Server where your Shelby Systems database is installed and have proper security authorization to windows and Shelby Security.

Note: ShelbyServices service must be running on the SQL Server where your Shelby Systems database is installed.

1. Start Shelby v5 and open the ShelbyServices Monitor and click **Settings**.
2. Click the button at the top of the screen to **START/STOP ShelbyServices** if desired. This option is only active from the SQL Server.
3. (Optional) Click the check box to **Use e-mail Throttling?** Refer to **Configuration** above.

Note: E-Mail Throttling allows you to choose the number of e-mails to be sent in a batch. The service waits for the specified time period before sending the next batch of e-mails. This will continue until the entire group of e-mails has been delivered. For example, the number of e-mails per batch will be sent as fast as they can be processed. The system will then wait the amount of time specified before sending the next batch of e-mails. Check with your internet provider to determine the optimum rate control settings. Refer to **E-mail Status:** to cancel or pause e-mails waiting to be sent. Removing the check to **Use e-mail Throttling** will not remove pending e-mails.

4. Select the **Number of e-mails/batch:** from the drop down list.
5. Select the **Wait Time Between Batches:** from the drop down list.

Minutes

Seconds

6. (Optional) Type the **E-mail Notification Address:** into the proper field. This would be the e-mail address of the person or group (e.g., IT, System Administrator, etc.) that will get notified when a problem with ShelbyServices is detected by the program.
7. Select the **E-mail From Person:** from the drop down list if you specified an **E-mail Notification Address:** above. The drop down list shows everyone that has configured SMTP settings under GlobaFILE\Utilities\SMTP Setup.
8. Click the **SMTP Settings for user [name]** button to establish or change SMTP settings.
9. Fill in the information and click **OK** when done.
10. Click the **Save** icon to save the settings.
11. Click the **Close** icon to return to the Home Base screen.

Log File:

Use the Log File option to review ShelbyServices activity and purge old entries.

1. Click **Log File** from the menu.

Note: To purge old activity, highlight a date that you wish to purge from and then click the Purge button.

2. Click the **Close** icon to return to the Home Base screen.

Backup Activity:

Use the Backup Activity option to review when backups started and finished.

1. Click **Backup Activity** from the menu.
2. Choose the **Database** from the drop down list.
3. Click the **Close** icon to return to the Home Base screen.

E-mail Status:

Use the E-mail Status option to review Outstanding and Sent E-mails.

1. Click **E-mail Status** from the menu.
2. Choose the **Status** from the drop down list.
3. To change the status of an e-mail, highlight an e-mail and click the **Options** button.
4. You can choose **Cancel** or **Pause** from the drop down list if desired.
5. Click the **Close** icon to return to the Home Base screen.