Startup Notes for Standard CMD 2015.x Setup

The standard CMD program setup refers to the 2015 version of The Church Membership Directory software, which includes the two phone apps (one for staff use and one for general member use) along with the web server software required to power the phone apps.

The following instructions will guide you through setting up your new standard CMD 2015 program along with how to import any data from a prior version of CMD. The steps are not difficult, but they must be followed in the correct sequence. The entire process should take no more than a few minutes. It will take longer to explain it than to actually do it! But just follow the steps in order and you should be fine.

Do This First!

Before making any changes to your computer or your current CMD setup, pause now to make a fresh backup of your current data! Once a new backup has been made, proceed with the following instructions:

Download Setup Files

Go to this page on our web site:

> www.softwareforministry.com/html/cmd2015downloads.html

Once on this page, download these two files:

> CMD2015.xSetup.Exe
>
> CMD2015ToolsSetup.Exe

Note: Place both of these setup files on the desktop of your computer, but do NOT run the CMD 2015.xSetup.Exe program until told to do so in the flow of these instructions!

CMD 2015 Tools Setup

Run **CMD2015ToolsSetup.Exe** setup program by double-clicking its icon on your desktop. Click the buttons to continue through the setup process.

Special Note: Some anti-virus programs will take exception to the CMD Tools program and attempt to block it (or in the case of Norton products) completely delete it. They react this way because the CMD 2015 Tools program has code in it that starts/stops and installs/uninstalls Windows services. Your anti-virus program doesn't know that CMD Tools is ok because it only accesses those Windows services that are part of CMD, so if it is blocked or removed, you will need to temporarily turn off your anti-virus software and rerun the setup program. In some cases, you may even have to download it again first.
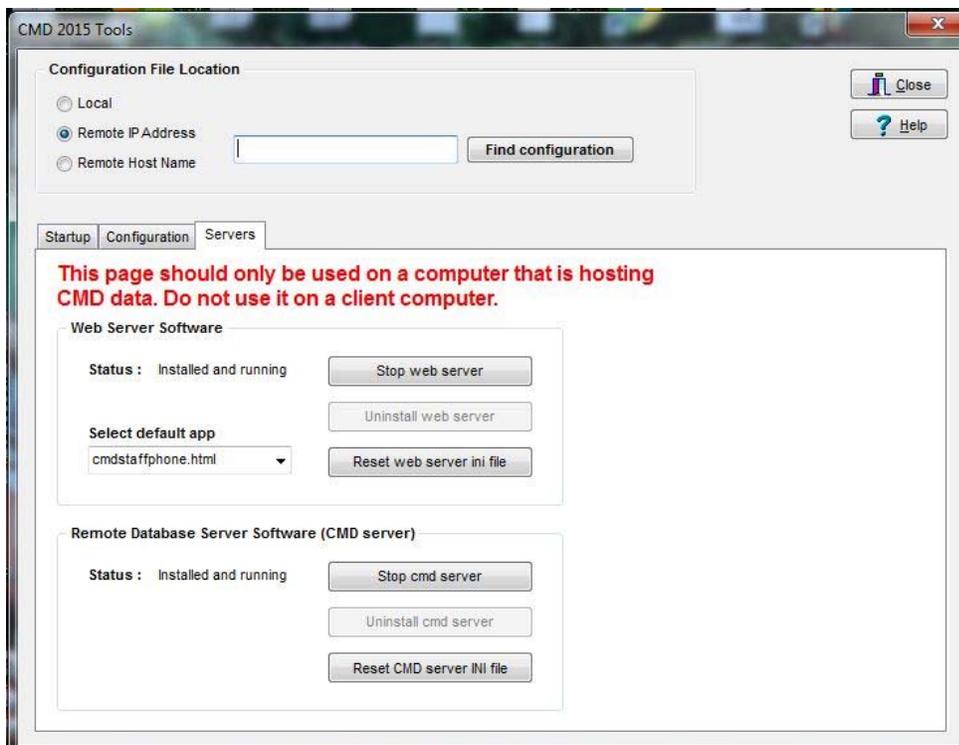
Stop the Web Server

If you have been using the phone apps and/or the tablet apps with your CMD 2013 or 2014 program, you will need to temporarily stop the web server on your computer *before* you run the CMD2015.xSetup.Exe program. **If you have never used the phone or tablet apps and have never started the web server, you can skip to the next section, CMD 2015 Setup.**

To temporarily stop the web server, you will need to startup up the CMD 2015 tools program for which you just ran the setup program in the previous step.

In order to do this, you must start up CMD 2015 Tools in a specific way. Instead of double-clicking the CMD 2015 Tools icon, instead, right-click on it and select the option from the menu that says Run as Administrator.

When the CMD 2015 Tools program is running, find and click the Servers tab and note there are two boxes on this page, one referring to the CMD Server (which you can ignore), and the other one, the one nearest the top of this page, refers to the CMD Web Server. Inside the box for the CMD Web Server, there will be a button you can click to Stop the Web Server:

If the Status for the Web Server Software says Installed and running, click the button to the right of the Status line that says Stop Web Server. You do not have to uninstall it, but you do need to stop it.

Once the web server has been stopped, you can exit this program. You will need to come back to it later, but we'll cover that when the time comes.

CMD 2015 Setup

Only now should you run the setup program for the actual CMD 2015 program. Note that when you run the setup program, you will be prompted to enter a password. You will have received this password from Software for Ministry.

To run the setup program: find the **CMD2015.xSetup.Exe** file on your desktop and double-click on it. Enter the password, and then click the buttons to keep continuing through the setup process.

CMD does not give you a choice of folders when setting up the program. That's because there are a number of folders CMD must find in specific places, so those are preset for you. Basically you just keep clicking the buttons to continue.

The setup program will place two version of CMD 2015 on your computer:

- **Classic**: This is the CMD you've known and have been using updated for 2015. All of the features you are used to in CMD are there. You can use it as you always have.

- **FMX**: This is the CMD reboot for 2015, which is the basis for a future Mac version of CMD, which we hope will be available sometime during 2015. Currently, the FMX version is not fully built out, but there are a number of functions in it that are fully implemented and thus useful right away. See the notes on the FMX version at the end of these setup instructions for more details.
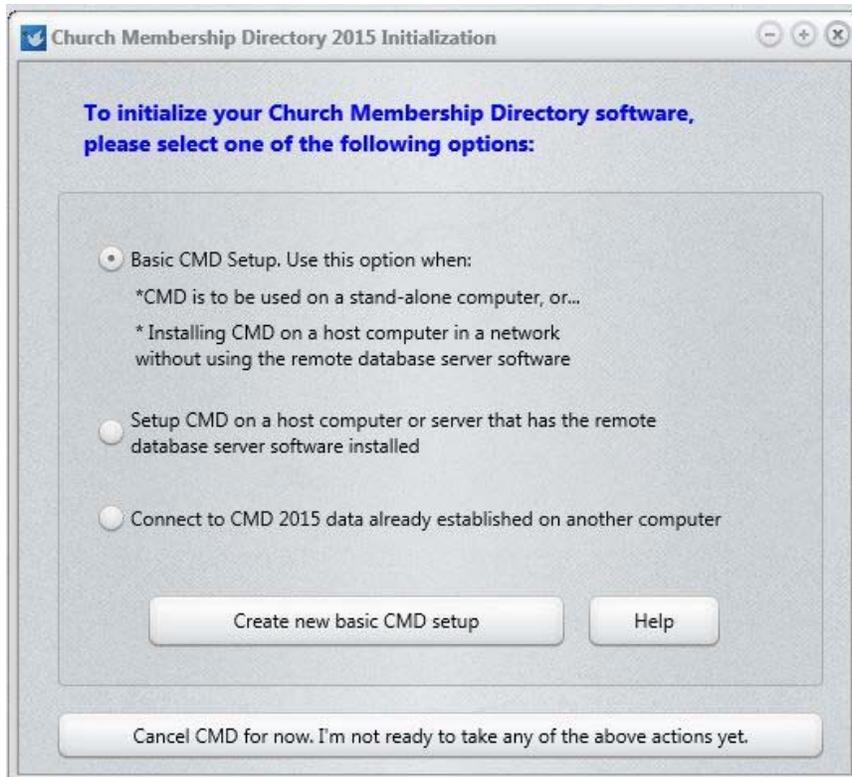
Note that you can freely switch back and forth between the Classic and FMX versions as desired since they work with the same data and the same startup information.

After clicking Finish, you can startup CMD 2015 for the first time. If CMD 2015 doesn't automatically start up when you click the Finish button of the setup program, find and double-click the CMD 2015 icon on your desktop.

You may also double-click the CMD 2015 FMX icon if you wish. You may use either version for the startup processes. They work exactly the same, though the screens will vary in minor details. We'll use the new FMX version for our screen grabs so that you can see a little of the refreshed look for CMD right from the start.

Whether you have a prior version of CMD already installed or if you are installing CMD 2015.x as the very first version of CMD going on your computer, the first steps you will take are exactly the same because either way, CMD 2015 needs to set up its own file space and create the tables that are used in the overall CMD database for 2015.

When you run CMD 2015.x for the first time, you will see this dialog:

You must follow through with the initialization process for CMD 2015 before you can enter any new names into CMD 2015 or import data from a prior version. Though there are 3 options for initialization, **you will select the first option**, Basic CMD Setup, and then click the **Create** button on the lower part of the dialog.

Basic CMD Setup

Whether you are setting up CMD on a single computer to which no other computers will need to connect, or if you intend to network CMD but you are not using the Remote Database Server software, the basic CMD setup is all you need.

Note that if you are going to be networking CMD, the following instructions are to be done on the host computer only. See **Networking CMD** later in this document for instructions on how you connect other computers on your network to CMD's data.

In either of the above cases, you will be creating a "local file", meaning that CMD connects to the data directly through its local server. While network connections can be made through the local server, you cannot connect to CMD data from outside your network as you can if you use the remote database server software.

When you click the **Create New Basic CMD Setup** button, you'll see this dialog:

When this dialog first appears, **File Description** field will be highlighted. Use this field to type a descriptive name for the CMD file you are creating. Here are some examples:

    First Community Church 2015 Data
    Grace Church Data 2015
    Church Family Data 2015

I suggest that you have the 2015 date in there somewhere since CMD's configuration file can now recognize CMD files from multiple years, and having the year in there will help keep things straight.

The same is true for both the **Database Name** and **Data Folder** fields. We suggest having 2015 in the name or folder to avoid confusion with prior CMD data files, or data files created in future years.

You are free to use the suggested Database Name and Data Folder Name, or you may substitute your own entries in for either or both of these fields if you wish. If you wish to create additional

CMD files for CMD 2015 once you've completed the basic initialization process, bear in mind that each new CMD file that you create will need to have unique names for *both* Database Name and Data Folder Name that differs from other Database Names and Data Folders already defined in your CMD's configuration file.

Church Information

New to the installation process in 2015, is the entry of Church Information. While this information can be entered later, I advise you to do it now if it at all possible. Prior church information is not imported, so it needs to be established again (we store it differently in 2015 and onward).

Note the checkbox that says Use This Information for Phone/Table Apps. If you use either the phone or tablet apps, your church's contact information is needed for the login page of the phone and tablet apps. If you check this box during the Create CMD File process, the Church Information you provide here will be written into the special file that is used for the phone and tablet apps.

Creating the File

Click the **Create CMD File** button when all the fields have been filled in as desired. This will cause CMD to create all the data tables for the CMD file in the data folder that you defined above. You'll see a gauge display the progress of completing the task.

Once it's finished, you'll be taken to CMD's home screen where you can either begin entering information or import data from CMD 2012, CMD 2013, or CMD 2014 using the **Import Prior Data** item on CMD's **Utilities Menu**.

NOTE: If you have data from a CMD version prior to CMD 2012, we will have to do the data import for you. There is a small nominal fee for this service. Please contact me at mic@softwareforministry.com for details.

Phone Apps

There are two phone apps that come free with CMD 2015, along with the web server required to make them work. For a live demonstration of how they work, look here:

http://www.softwareforministry.com/html/livephoneaccess.html

One phone app is used for staff only, and the other for general membership. The link above will explain the differences in use and the differences for the login procedures.

To Make the phone apps work, you'll need to do the following:

- Reopen the CMD 2015 Tools program, and click on the Servers page again.

- Open the combo box below the words Select Default App in the box where the Web Server stuff is located, and select the app that you wish to have pop up if only the IP address or domain name of the host computer is entered in the phone's browser. You may select None as an option if you prefer.

- Click Reset Web Server Ini File.

- If the Web Server Status shows Not Installed, click the button to Install Web Server.

- Once the Status shows Installed but not running, click the button to Start Web Server.

If this is your first use of the phone apps, you will need to make sure that your computer/router has been prepared for it. A static IP address or domain name from a DNS service such as Dyn.com that is visible from the outside is required in order for this to work. You will also have to make a few settings changes in your router. Here's a link to some items on our web site that tells you more:

http://www.softwareforministry.com/html/serverprep.html

Networking CMD

Instructions on how to connect networked computers through the local server to the CMD data file you have just installed can be found in CMD's internal help files. To access this help, click **CMD's Help Menu** and select **Help Contents**. When the help file is on the screen, click the **Index** tab near the upper left corner of the screen and type in: **connect client computers without RDBS** to find that help topic.

What's New in CMD 2015?

To see a list of the changes in CMD 2015.x, select the Help Contents option on CMD's Help Menu. Scroll to the very bottom and you'll see a chapter there for New Features in CMD 2015.x. Open that chapter and read over the introduction to the new features.

CMD 2015 FMX Notes

The FMX version of CMD represents two steps forward in CMD's development:

1. Refreshed, updated look
2. Basis for future Mac version

It's our hope to have a Mac version ready even as soon as this summer, though it's difficult to tell at this point. There are two key components that have to be updated to work in the FMX framework that I need to make CMD work in both Windows and Mac environments:

CMD's Data Engine. Our data engine provider is working on this already, and I expect it to be finished in a couple of months. While we cannot say for sure at this point, our hope is that PCs and Macs will be able to exist on the same network and access the same CMD data. Further, we hope that either a PC or a Mac will be able to serve as the host computer for CMD's data.

At the very least, CMD should be able to work on a PC-only or a Mac-only network, but I'm still optimistic that both can work together. We'll know soon. For now, CMD is still PC-only, and we will let you know as soon as a Mac version is possible.

CMD's Print Engine. This is a crucial component that I'm still awaiting word about. If the provider of the print engine CMD has been using since 1998 decides to port the engine to FMX, it will be a relatively simple matter to transplant virtually all of the print routines from the Classic version over to the FMX version.

If not, it means I have to build the actual printing report code again from the ground up. I'm hoping and praying that won't be the case. This is the reason there are no print functions in the FMX version in this first release. I didn't want to do any work toward either alternative at this point until I knew for sure which way I'd ultimately have to go. Instead, I've put my time into getting as many basic features into the FMX version as possible.

What's Working Now

In CMD 2015.1, the FMX version contains the following working functions:

File Menu (all items)
Find Menu
Names Menu
      Enter/Modify/Delete Names
           Most Local Preferences have been moved here
      Quick List (moved to this menu, all functions on same dialog)
      Visitation
      Attendance (basic functions, no name tags or phone-based entry, or forms)
Utilities (only Import 2012, 2013, and 2014 files)
Preferences
      Church Contact Info
      Members List
      Change Password
      Global Preferences
      User Administration

Contributions – a work in progress. I have done quite a bit on the Enter/Modify/Delete Contributions dialog, but not enough for you use it in the first release. I should have this finished within the next couple of weeks, and will let you know when it is ready.

Very Important!

Please take a look at the poll in my initial e-mail to you about CMD 2015.1 to let me know which functions you use most that are not yet finished so that I will know best how to prioritize my time. Your responses there are very important!

If You Get Stuck

If you have problems with your basic setup, please e-mail me for help at mic@softwareforministry.com. You can also text me if you'd like: 817.219.1243.

If you text me, please give me your name and your church because I likely won't have your name and number in my phone's contact list.

I request that you contact me via e-mail or text first rather than calling. My work day often finds me in meetings, and it will most helpful to hear from you in a way other than by phone first. I will get back to you as quickly as I can. If I can't resolve the issue by e-mail, we'll set a phone appointment so that I can speak with you.

My cell also gets so many robo-calls these days that I just don't pick up on numbers I don't recognize any more.

Thanks in advance for contacting me by e-mail or text first.