

The Church Membership Directory

Version 2006.2

Setup Notes and New Feature Documentation

The purpose of this New Features Guide is to document the new features and fixes in CMD 2006.2. Please read it through so that you will know how the new features work and how to convert prior CMD version data.

If 2006.2 Is Your First CMD Version...

If you have never used CMD before and are starting with 2006.2, simply run the setup program and initialize CMD according to the instructions in the manual or in your Startup Notes. If you purchased CMD with CD's, the setup program will be on the master CD.

If you purchased a download version of CMD, the setup program will be on the download page (instructions for accessing the download page would have come with your purchase). This will be for CMD 2006.1. Use the setup program for this version, then apply the 2006.2 patch available on the **2006 Updates** page of our web site.

If You are Updating from 2006.1...

To use CMD 2006.2, you will need to use either the setup program or the program patch (depending on which version of CMD you purchased for the year – the end result is the same). Once the program has been loaded onto your computer, you may simply use the program as before. There will be some changes made to the data file structure for 2006.2, but these changes will be made automatically as you begin to use 2006.2. No other import or update is required when moving from 2006.1 to 2006.2.

If You are Updating a version prior to 2006.1

If you have a prior version of CMD that has not yet been converted for use with CMD for 2006, you'll need to refer to the instructions at the end of this document to import your data. CMD's data structure changes a bit at the start of each new year, so you cannot simply backup your older version data and then restore it in CMD 2006. However, simple-to-use tools are provided to help you work through the process of importing your data. **Should you have any trouble importing data from an older version of CMD, backup your data and e-mail it to us and we will provide the conversion for you free of charge.**

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New Features/Fixes Summary for CMD 2006.2

- **Quick Name Entry.** Available within many CMD functions, Quick Name Entry allows you to add new names “on the fly” *without* having to first leave the function you are working with and go to the Enter/Modify/Delete Names dialog.
- **Places Scheduling.** The first of a people, places, and things scheduling tool, Schedule Places allows you to define spaces in your church plant that may be reserved by church ministry groups, individuals in your congregation, or by your community. You can easily track room usage to prevent double-bookings.
- **Attendance Entry Improvements.** Now you can delete a name from an attendance list right on the Enter Attendance dialog. You may now also call up names already marked for a list so that you can double-check it or to finish posting a list that was only partially completed.
- **Name and Envelope Number list addition.** There’s a new function to print the name and envelope number on standard 3-across labels that can be pasted directly onto offering envelopes.
- **E-Mail Addressing.** Two important improvements are found in 2006.2 in response to user suggestions. First, to provide privacy, when addressing e-mails in Print Names, the list of names now goes in the Outlook mail client’s BCC address line instead of the regular “To” line. Using the Blind Carbon Copy address line means that others that receive the e-mail won’t see the names and e-mail addresses of the others who are also receiving the same message. Second, you can address an e-mail to an individual by clicking a new button on the Individual Name Search dialog. When a name that has an e-mail address is highlighted, you can click the **Send E-Mail from Here** button and the Outlook mail client will appear with the person’s e-mail address populating the “To” address field. All you have to do is add the subject, the message, and send the e-mail.

Important Fixes

- **User Administration.** There was a minor bug in the user administration dialog. When the dialog first came up, even though the Administrative Users radio button was selected, internally Administrative Users was *not* selected. **This caused the list of administrative users *not* to appear in the list box.** Before 2006.2, you would have had to select another user group, say, Full Access Users, and then re-select Administrative Users again and this time the list would show because the list was selected internally to match the selection you made with your mouse.

This has been rectified so that the internal selection is correctly made, and the administrative users list shows correctly when the dialog first appears. An important implication to this bug was that if you attempted to create a new user in the administrative users group, the name never actually got saved into the program because the administrative group wasn’t internally selected.

- **Backup Info.** A small bug in the automatic backup feature (new for 2006.1) caused an error if you attempted to restore data onto a stand-alone computer *only if* the data was backed up from a computer where CMD is connected to a network. If you encountered this error, you likely had to shut CMD down using the Task Manager.

This would *only* be a problem if you set the auto backup path to a path that existed only on the network but not on the stand-alone computer onto which you restored the data. In 2006.2, appropriate code was added to first check for a valid path before the process which generated the error even starts executing. In those cases where the backup path is not available, CMD defaults to an initial path setting that will work on any computer so that a safety backup is still made.

- **Backup/Restore LOGS & “Can’t Truncate This Type of Stream” error messages.** Users would get the “Can’t Truncate...” error message when restoring from a CD-R because the program wanted to create a restore log at the same location the data was from. That meant an error since you can’t write directly to a CD-R. I’ve changed the internal process so that now CMD creates the log file in CMD’s data folder, so that error will never happen again. Note that the log only shows the most recent backup/restore.

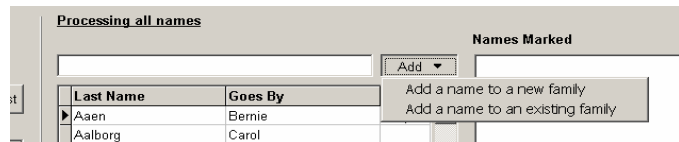
Quick Name Entry

Quick Name Entry is a new convenience feature that can be a real time saver. Use Quick Name Entry when you are working in a CMD feature or function other than Enter/Modify/Delete Names where you find yourself needing to enter a new name “on the fly” into your CMD file.

For example, before 2006.2, if you ran across a new name you want to mark present for an attendance event that isn’t yet in your CMD data file, you had to leave Enter Attendance, go back to Enter/Modify/Delete Names, enter the name into CMD’s data file there, then return to Enter Attendance and continue marking your attendance list.

Now you can click the small **Add** button located just to the right of the edit box where you type in a name for a name search in Enter Attendance, and add the new name without having to leave Enter Attendance!

When you click Add, a small two-item menu appears from which you can select either to add a new name to a brand new family in CMD, or add a name to a family that already exists in CMD.



If you elect to add a name to an existing family, a Family Name Search dialog appears so that you can select the family to which the new name is to be added.

When you get to the Quick Name Entry dialog (see the screen grab on the next page), you will see fields for name, address, e-mail, 3 phone numbers, and a few other basic CMD data fields.

Enter as many of the items as you can (it will save you time later), then click **Save** and the name will be added to your CMD data file. The new name just added will become immediately available to you in the dialog’s Name Search tools after you’ve exited from Quick Name Entry.

Bonus Feature when Entering Attendance

There is a bonus feature to this when entering attendance. Since you can use the tools on the Enter Attendance dialog to filter the list so that the list of names from which you select for marking attendance is smaller and easier to work with, adding a name with Quick Name Entry causes CMD to add this new name to any filtered list you are working with.

For example, if you are marking attendance for a given SS Division, say your Youth division, and you need to add a new name to your youth list so that you include the attendance for the newcomer, adding the newcomer’s name via the Quick Name Entry will also cause the SS Class/Division field for this person to be changed to Youth so that when you finish adding their name via Quick Name Entry, they will immediately show up on list of youth names in the name search area of Enter Attendance.

You’ll can access Quick Name Entry on Enter Attendance, Enter/Modify Contributions, Quick List, Hot List, Christian Learning, and the Worship Planner. Just look for the small Add button nearby the dialog’s name search tool’s edit box.

In the screen grab of the Quick Name Entry dialog above, note that the fields on the right half of the screen will reflect any defaults you have set up for CMD on the Preference Menu’s General Preferences choices. You can override any of them, of course, but the fields here will reflect your default preferences.

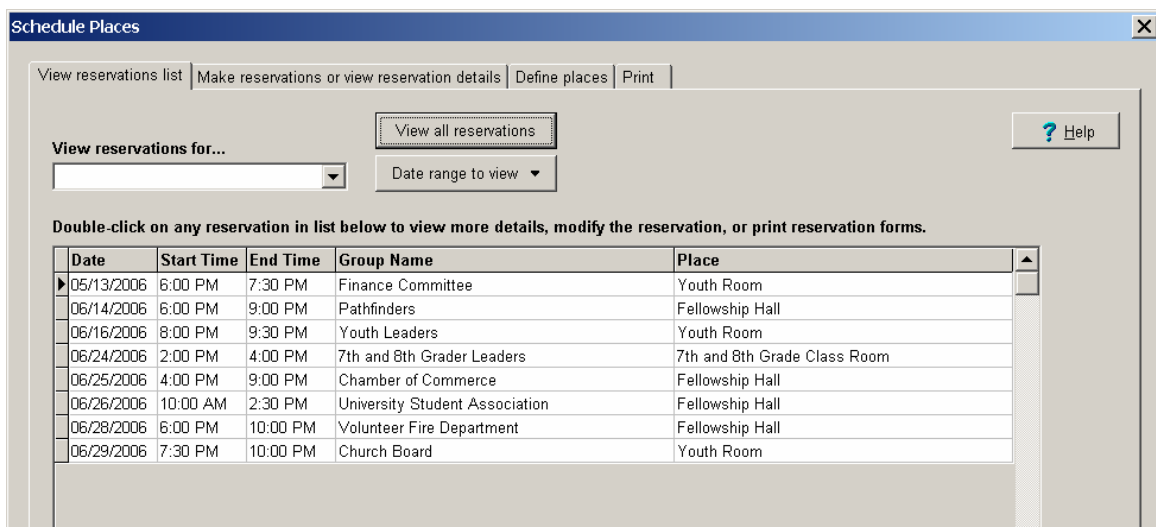
When adding a name to a current family, the Family Name field info is displayed across the top of the dialog in place of the “Add a Name to a New Family” prompt that you see above. Also, the address that is shown when adding a name to a current family is for reference or confirmation. only and any changes made to the address will not be saved in the family record. You’ll have to use Enter/Modify/Delete Names for that.

Schedule Places

The **Schedule Places** feature of CMD 2006.2 is a tool that you can use to schedule virtually any space in your church facility that you make available for use by ministry groups, church members, or those in your community. Tracking the use of your church's rooms will enable you to make sure space isn't double-booked and that the use made of the space is appropriate.

To use the Places Scheduler, click on the Tools Menu, Schedule, then select Places (other schedule items will be added in future CMD updates).

When you first arrive at Schedule Places, you'll see this dialog with 4 tab pages, each with a specific set of features and functions.



View Reservations List page

The View Reservations List page is what first appears when you arrive at Schedule Places, and is used to display a summary listing of reservations. The grid can display reservations according to any number of filters you can apply:

- To see all reservations for any given space, open the **View Reservations For...** combo box and select the room or space from the list. Immediately the grid will display only those reservations for the space selected.
- To view only current reservations, or view only reservations prior to today's date, or view all reservations regardless of date, click the **Date Range To View** button and select the date range you wish to view.
- Click **View All Reservations** to cancel all filters and view the entire list of reservations.

Define Places

Before you make any reservations, you will need to define the various places in your church you wish to make available. As you define a place, you are actually pre-defining a number of parameters about each place that will make the reservation process you'll do later on easier. To define a place, click the **Define Places** tab. Following is a description of each field:

The screenshot shows the 'Schedule Places' window with the 'Define places' tab selected. The fields are as follows:

- Place Name:** Fellowship Hall
- Capacity:** 400
- Access:** Key checkout permitted (dropdown menu)
- Key deposit:** \$25.00
- Cleaning Deposit:** \$150.00
- Availability:**
 - Church office approved only
 - Church ministry/activity
 - Church member **Rate:** \$50.00 **Per:** 2 hour block
 - Community **Rate:** \$75.00 **Per:** 2 hour block
- Overtime Charges:** \$15/hour
- Notes/Comments:** The Fellowship Hall may be used by most anyone provided the activity is within bounds. No smoking or alcoholic beverages, please. All renters are responsible for their own cleanup, or the deposit is forfeited.
- Blackout days/times:**

Day	Start time	End time
Tuesday	10:00 AM	12:00 PM

Place Name. First, enter up to 40 characters for the place's name then press TAB to move to the Capacity field. The Place Name is the identifier you'll use when selecting a place to reserve later on.

Capacity. Enter in the number of people the room holds.

Access. The Access field has two choices:

- **Key Checkout Permitted.** Use this choice if the person or group reserving the space may come to the office and check out a key for entrance into the reserved space. If this choice is selected, you can enter a required key deposit amount.
- **Attendant Required.** This choice allows you to determine if someone "official" from the church must be present to open/close the room, and supervise the activity.

Cleaning Deposit. Use this field to enter any required cleaning deposit for use of the room.

Availability. This field determines who may use the space:

- **Church Office Approved Only.** Selection of this option means that any potential use of the space or room can be granted only by the church office. In actual practice, it may be your church board, finance committee, or other governing body that determines this.

Selecting this option just means that the room is not generally available and special permission must be sought.

- **Church Ministry/Activity.** When this option is selected, it means that any regular, recognized local church ministry group or leader can reserve the space for the ministry's use. It is generally understood that such use does not require any specific rental charge.
- **Church Member.** When selected, this option means that a local church member can reserve the space for their use. For example, say a church member wishes to celebrate their 50th wedding anniversary in the church's Fellowship Hall. It's not really a church ministry activity, but it's a valid activity for a member of the church. Though you can set fees for its use, they can be waived depending on the situation.
- **Community.** This selection means that the space can be made available to appropriate community use when the situation warrants. Rental fees may also be defined for this classification, which may be waived if desired.

Overtime Charges. Enter the amount of cost for use that goes beyond the scheduled use reservation.

Notes/Comments. Enter any restrictions, instructions, or warnings that are necessary for the use of the space you are defining. These notes will be printed in the reservation form so that those who reserve the space will be aware of local church policies regarding the use of church facilities. Also make sure to detail any obligations the renter has in terms of cleaning up the room and responsibility for damages

Blackout Days/Times. These are days and times that are already reserved on a regular basis for general church use. For example, if your Fellowship Hall houses a class on your worship day, then enter the day and time as a blackout so that no one will ever try to schedule something then. Enter as many blackout dates/times needed for any space.

Viewing Defined Places

If you need to view the various places you've defined or if you need to modify any of the details about them, use the navigation bar just to the right of the Place Name field to move around in the list of places.

Make Reservations or View Reservation Details

The **Make Reservations or View Reservation Details** tab page allows you to define a new reservation, or view (or modify) the details from a reservation already in your file. Reservations are made based on the rooms or spaces you've already defined on the Define Places tab page.

Make Reservation

Click the + button in the navigation bar to add a new reservation. When the fields on the dialog clear, you can begin to fill in the fields that make up the reservation:

Place To Reserve. This is your first selection, and is made from a drop-down list of all the places you have defined on the Define Places tab page described earlier. Once you have selected the place, a number of fields will be filled in automatically for you depending on what has been defined for the place you have selected.

Reservation Type. The list that appears for this field are those types of groups whom you determined could reserve the selected place when you defined it. When you select which type of eligible group is reserving the space, other fields will be filled in according to how you set up the room in Define Places.

Group Reserving. This text field is designed to hold the name of the group that will be using the room. This is a history list field, meaning that CMD will remember entries made in this field. This will make it easier to reserve places for groups that do so frequently. The information entered in this field is displayed in the grid on the View Reservations List tab page.

Activity. Type in a general description of the activity that the room will be used for. Activity is also a history list field.

Activity Date and Times. Use these fields to enter the date the room will be used, and the expected times.

Rental rates/Overtime/Deposit. The rates that are displayed are based upon what has been defined for the room for which the reservation is being made by the type of group wishing to reserve it.

Actual Rental Cost. Type in the final, agreed-to rental amount, giving you flexibility to override the defined rental rates if desired.

Attendant. If an attendant is required to open/close the room, and supervise the activity, then the **Attendant Name** and **Attendant Phone** fields are enabled. If the attendant's name is in your CMD file, click the button on the right edge of the Attendant Name field to get a Name Search dialog to search for the attendant's name.

Above: The Places to Reserve field lists all the places you've defined as being available for reservations. When you select one, the details of the place's definition will be filled into the appropriate fields on the Reserve a place tab page.

Below: When a particular place is selected, the Reservation Type list shows the groups who have permission to reserve the place. The Rental Rate fields will reflect the choice made in this field.

If an attendant is *not* required for this place, then the Attendant Name/Phone fields are disabled, and the fields relating to dates a key may be picked up and the key deposit are enabled. Key fields also include a field to hold the date the key was returned, and a check box to show that any key deposit collected was returned.

Note that you can manually change the attendant requirement by clicking the **Change Attendant Requirement** button if you wish to override the defined setting for this room for a given reservation.

Reservation Contact Information. Enter the contact information of the person making the reservation. Click the button to the right edge of the name field if the person is in your CMD file. If so, their address, phone, and e-mail information will be entered automatically.

Notes/Comments. The notes for this room should contain the restrictions and instructions for using this room. They are based on the notes/comments defined for this room, however you are free to type in any additional information that may pertain to a particular reservation as needed.

Accepted By. Use this field to type in who took the reservation.

Blackout dates and times. Note that there is no automatic warning mechanism in place at this time to warn you of a conflict. Be sure to look over the blackout times to make sure you haven't created one!

Printed forms on this dialog include a Finished Reservation Form that can be signed and given to the person making the reservation, and a Reservation Request Form that can be given to people who wish to make a reservation to make it easier to gather information.

View a Reservation

To view any given reservation, double-click directly on the reservation you wish to view in the grid on the Schedule Places tab page. This will bring up the reservation in the Reserve a Place tab page so that you can view/print it.

If you are already at the Make Reservations tab page, use the buttons on the navigation bar located above the Place to Reserve field to move around the list of reservations.

It's Easier than it Sounds!

As is often the case, actually making a reservation is much easier than the explanation makes it sound! Once you have defined your places, making reservations is fast and easy, and the filters available when viewing the reservations makes it a simple matter to make sure a place is available or not. As with all new features, we welcome your feedback and comments.

Print Reservations

To produce hard copy of your reservations, click the Print tab page. The print page has 4 available print forms:

Finished Reservation Form. When you have selected a reservation already made, either on the View Reservations List tab page or the Make Reservations/View Reservations Details tab page, the reservation appears to the right of the Finished Reservation Form selector. If this is the reservation you wish to print, click Begin Printing. If it is not, go to either of the first two tab pages and select the reservation you wish to print.

The finished form prints all the information about the reservation, and includes space for the person reserving the space to sign it. You can make copies for your office files if you wish once the form has been signed.

Reservation Request Form. Use this form to print out a sheet that a prospective renter can fill out to return to you. It will make it easier to enter the reservation into CMD when you have all the information that you will need. This form makes it easy to gather the information.

List of Reservations. Select this form if you want to see a list of reservations based on room or group. The list will show all the reservations related to what you select. In other words, if you select only something for room, it will give you all the reservations ever made for that room.

If you also select group, the list will be limited to just that room and that group. If no room is selected but the group is, all reservations (regardless of room) will be printed.

You can further refine your list by entering starting and ending dates for the list.

List of Places. This is a brief list of all the places currently defined in the file so that you can review and update them as needed.

Attendance Entry Improvements

Two key improvements have been made to the Enter Attendance dialog's attendance entry process.

Get List

The first improvement, Get List, allows you to display the list of names in the order in which they were marked present for any event and date that you had worked on earlier.

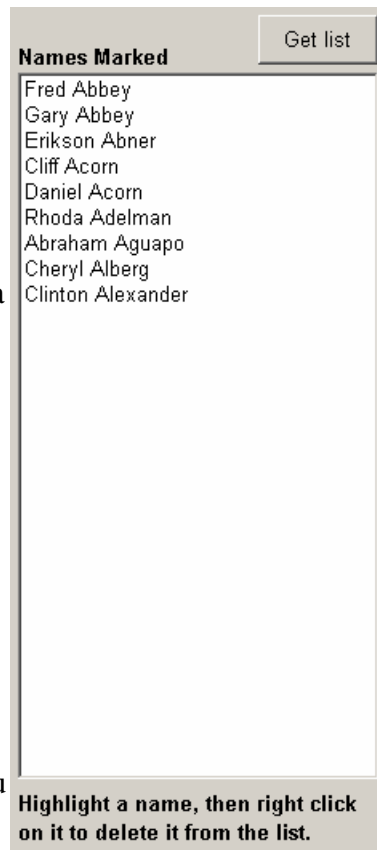
In order to use this feature, first recreate all the parameters on the left side of the Enter Attendance dialog including date, event, Affiliation, and group selection. After recreating these choices, click the Get List button in the upper right corner of the dialog just above the Names Marked list box. Any names matching the criteria you specified who have already been marked present will be displayed in the list in the order in which they were marked.

This enables you to verify that all names have been marked, or it allows you to return to a partially completed attendance-marking session and pick up where you left off.

Delete a Name

Prior to 2006.2, the only way to delete a name from the attendance list was to call up the name in Enter/Modify/Delete Names, click the Attendance button, and delete it from there.

Now it's much easier. All you need to do is to find the name in the Marked Names list, click on it first with the left mouse button to highlight it, then right-click on the name to delete it. An "are you sure?" prompt appears as a final safeguard. You may delete as many names from the attendance list as needed in this manner.



Converting Prior CMD Data for use in CMD 2006

You can easily import data from prior versions of CMD for use in CMD 2006. However, *you cannot simply backup data from a prior version and restore it directly into CMD 2006!* It must be imported through a selection on CMD 2006's Utilities Menu. This is necessary because each new year brings a few changes to the data file structure. So while the items of information may be imported, the old data structures themselves cannot be.

CMD 2006's import function handles data from CMD 2001—2005 only. If you have data from a version older than 2001, please contact us directly and we will do the conversion for you free of charge.

There are two **very important rules** that apply to the importing of any prior version of data:

- **Make a backup of your current data before you start anything!** In fact, make a couple of backups. Make sure you start with a clean floppy, or better yet, use a CD-RW or Zip disk. Do NOT proceed without first having backed up your data!
- If you have any difficulty importing your data, **don't panic!** Just make contact with us and we'll either walk you through it or we'll have you e-mail your data directly to us and we'll do the conversion for you free of charge.

In order to import prior data, you *must* first have installed the new program on your hard disk and created a new CMD 2006 data file using the Create CMD Data File process when you started up CMD 2006 for the first time. Your import attempt will fail if you do not do this first!

If you use CMD on a network, see the notes on page 15 for instructions.

Import Data

While each prior version's import process is executed from a different dialog, the basic process is identical for each version and the dialogs used for the various versions are all similar. Thus we will only detail the import process once, using the import of CMD 2005 data as the example. Follow these steps:

- Start CMD 2006 and login.
- Click Utilities | Import Prior CMD Data | Import CMD 2005 Data.
- When the **Import** dialog appears, click the **Get Path to CMD 2005 Data** button. Use the Windows Browse dialog to navigate to the actual data folder of the data you wish to import. When you find the folder, click on it, then click OK.
- Once back at the Import dialog, click the **Import Data** button. At this point, all you need to do is watch and wait. The dialog will keep you informed as to its progress. Some of the conversions display a progress bar. Others do not. When the process is finished, a prompt will tell you. Click **Close** when finished.
- **Important note!** Any passwords and users defined in 2004 or 2005 **are lost** during the import process. That means that CMD 2006 returns to the default user name (admin) and the default password (password). You'll need to define users for the appropriate groups and create passwords all over again. Sorry, these cannot be imported.

If the CMD hangs during the import process and it becomes obvious that the program has locked up, you'll need to press Ctrl-Alt-Delete and use the Task Manager in Windows to End Task for CMD 2006. This will be rare, but it can happen, depending on the shape your data's in.

If the program hangs or if you get an error message of any sort during the conversion process, we will need to do the conversion for you. Just send us a copy of your original backup data that you made earlier and e-mail it to me at mic@softwareforministry.com and I'll convert it and return it via e-mail as a CMD 2006 format data file that you can restore. **Do not send me a copy of the program files or unzipped data files.**

As stated above, the process for importing is identical in each case. Just make sure you select the import dialog for the version of the data you have been using up till now.

And once again, please contact us if you have any trouble importing your data and we will assist you.

Importing Prior CMD Data in a Network

Following are instructions for importing on either a peer-to-peer network or client/server network setup. In general, you'll need to refer to the instructions for network setup in the CMD 2005 (and soon, the 2006) manual. Use these instructions as a supplement for importing.

Important Note for Advantage Database Server Users!!!

If you have purchased an Advantage server from us for use on your network, you **MUST** update to Advantage Database Server 7.1 **before** you attempt to put CMD 2006 on your network! This is critical!

E-mail me before you begin installing CMD 2006 and I'll give you a link where you can get the update (it's free to anyone with any version of ADS 7.0) and how to install it (it's easy—don't worry!).

This is required whether you are using the NT/2000, Linux, or Win9x servers.

Importing on a Peer-to-Peer Network

To import data from a prior version of CMD that is to be used on a peer-to-peer network, follow these steps:

- Start with the computer that is to hold the CMD's data that other computers will share. We'll call it the "host computer" for CMD purposes. Install CMD 2006 on the host computer, initialize it, and import the prior version data into it according to the instructions for the version you are coming from as outlined on page 11.
- Make the CMD2006 folder shareable on the host computer. Make sure you allow all users Full Access. Set users and permissions as applicable for your Windows version. This part of the setup is purely your responsibility. We cannot provide support for each Windows network situation. You are responsible to make sure that your network works. You are responsible to provide local personnel who can help you with users and permissions, etc.
- Once the import has been done on the main computer and it's been made shareable to the other computers, you can then install CMD 2006 on each computer in the network according to the instructions on page 166 in the **Using CMD on a Network** chapter in the 2005 manual.

The only differences in those instructions on page 166-167 relate to items #4 and 5 under "The Clients" section. In CMD 2006, you access the Create/Reconstruct dialog from a choice on the **Initialize** dialog, which appears when you first start CMD 2006 on a computer.

Importing on a Client/Server Network

Importing is even easier on a network with a server that is holding your CMD data. Here are the steps:

- Start by installing CMD 2006 on the first client in your network. Do this according to the instructions starting on page 168 of the CMD 2005 manual. The only differences will be

to substitute 2006 for 2005 in the instructions.

- Complete the initialization steps with a new data folder (CMDData2006 or something like it) in place. **Make very sure you do not attempt to create a new CMD data file in the data folder currently being used by a prior version of CMD!!! Doing this will overwrite critical data files, and you will have to resort to a backup of your prior version's data before you can continue!**
- After you've established the new data file and data files for CMD 2006, use the Import instructions on page 11 of this document and import data into 2006.
- Once the import has been completed on the first client, then you can set up the other clients as outlined on page 170 of the CMD 2005 manual under the section **Subsequent Clients**.
- There is a critical difference that you should note, however, in the Subsequent Clients section on page 170. In CMD 2006, you access the Reconstruct dialog differently than is listed there. You access it from a selection on the **Initialize** dialog, which appears when you start up CMD 2006 on a computer for the very first time. Make the selection from there to get to the Create/Reconstruct dialog.

If you have any questions or problems, contact us *before* you begin the conversion process.