The Church Membership Directory For Windows

Version 2006
Users Manual

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Upon the failure of CMD to conform with the warranty set forth herein or upon Software for Ministry’s failure to perform any of its stated obligations, User’s sole and exclusive remedy shall be repair of CMD.

Introduction

The Church Membership Directory for Windows, Version 2006 is a **full-featured** Windows-based church membership data base system designed to store, track, and report on important items of information relevant to a **thriving local church ministry**.

Included in “CMD for Windows” (or just “CMD”) is a full range of features to track mailing, phone, church-related, and personal information about members of your church or parish.

Names can be entered in **any order**, and information can be added or updated in any individual’s file record as information changes or becomes available.

Here are just some of the many tasks you can easily perform with CMD:

- Print **newsletter lists** (including bulk sorted labels)
- Address **envelopes and postcards**; print **name and phone lists**
- Display **pictures** of individuals or families
- Help create **mail-merge** letters
- Track member and visitor **attendance** and **print name tags**
- Keep track of **important dates** such as birth, anniversary, baptism/confirmation
- Print **date lists** for publication such as birthdays in a given month, etc
- Track **visitation records**
- Store **talents, church offices** held, and more
- Define **your own list of choices for all menus** (SS Dept, Offices, Talents, Membership Status)
- Print **“clerk” reports** listing members who join or leave during any given time period
- Print a **church directory** (many choices of styles and formats including pictorial). Distribute an electronic paperless church directory using **eDirectory**
- Create new categories as needed with our exclusive **Quick List**
- Track member **contributions** with the **Contributions Manager**
- **Backup or restore data** as needed right from within the CMD program
- Setup CMD on all the computers in your church setting for **no additional cost**
- **Setup CMD on a network**. There are no-cost and reasonable-cost options for networking to fit your church’s budget and work load
- **Front Desk** program allows you to put CMD on a computer away from the office to gain access to basic address/phone information only
- CMD is fully password protected, with multiple levels of access and permissions appropriate for different kinds of users

As you begin working with CMD, you'll grow to appreciate its ease of use and its depth of features. The more you use it, the more you'll discover what it can do for you!

In addition to this manual, you may get additional instructions from the extensive, on-line help system accessible at nearly every screen and dialog in the system.

Each chapter in this manual is designed to acquaint you with the many different features and functions in the system. Most serve as a reference for each feature or field, and some contain tutorials that actually walk you through the process of using some of CMD's features.

Hardware Requirements

CMD for Windows 2006 is a **32-bit software system** that will run on virtually any computer on which Windows 95 or later is installed, including Windows XP. However, like most Windows programs, it will run best on faster computers with lots of memory. Most any Pentium-class or later computer with 32MB or more RAM (64MB or more recommended) will do just fine. Hard disk space needed is generally less than 15 MB, though this requirement will grow substantially if you plan to store pictures with your names. You'll need a printer to print reports, labels, and directories.

Screen Resolution Requirements

CMD 2006 requires a minimum screen resolution of 800 x 600. 1024 x 768 or greater is preferable, however. We recommend that you use the **Large Fonts** display setting. The display font size option is generally selected on the same dialog that's used to set your computer's screen resolution. To see it, exit CMD, right click on any blank space on your desktop, and select Properties. The Font settings will either be on the Settings page or accessible via a button that will say something like Advanced Settings. Consult your display adapter's documentation for more information.

If you are using 800 x 600 and you cannot see all of the Enter/Modify/Delete Names dialog on your screen (it will pretty much take up the entire screen area when it's displayed properly), then you should change the Font Size settings to accommodate it.

Help Us Grow!

Over the years, we've expanded and improved CMD by incorporating the wishes and suggestions of our users as far as possible. If you have ideas or suggestions which will help us make CMD a better ministry tool for you, please don't hesitate to contact us by phone, mail, fax, or e-mail with your suggestions. Your ideas are the substance of forthcoming versions!

1
Getting Started

This chapter is important reading for all users. Whether you are brand new to CMD or updating from an earlier version, this chapter has important information that you *must* have in order to use CMD 2006. Here you'll learn how to…

- Get CMD 2006 onto your computer
- Initialize it for first use (**both new *and* updating users need to do this!**)
- Login for the first time (**you'll need to use the default user name and password even the first time you start up!**)
- Convert prior CMD data (if you have prior CMD data you wish to bring in to CMD 2006)

Install CMD on Your Computer

Do NOT use the following instructions if…

- You need to install CMD on a network that has a server
- You need to install CMD on computers that will *not* be holding the data in a peer-to-peer network.

If either of these applies to you, instead refer to Chapter 22, ***Using CMD on a Network,*** *starting on page 181 for instructions on how to install CMD for your network.*

However, you should use the following instructions if…

- You are installing CMD on a single computer
- You are installing it on the computer in a peer-to-peer network that will act as the server for CMD data

Installing CMD is a two step process. First, you run the CMD's setup program to unpack the various files used in the CMD software system which places them in the CMD2006 folder created on your computer. Secondly, you initialize the software's data files for use on your computer.

These two steps must be taken whether you are installing CMD on a computer for the very first time, or if you are installing this version of CMD as an update to an earlier version of CMD for Windows. Instructions for converting any prior CMD data are provided on page 6.

Installation Step 1 - Getting CMD onto Your Computer

If you purchased CMD on CD:

- Start up Windows. Place the CMD CD Master in your CD drive.
- Click Start | Run. When the Run dialog appears, click Browse. Navigate until you find your CD drive. Find a file named **CMD2006.xSetup.Exe**. Click on it, then click Open, then click OK when you are back at the Run dialog.

  This will start the Setup program which will transfer the system files to your hard disk. Even though the setup program gives you some options for program folder and path, we strongly urge you to **use the defaults the setup program provides for you**.
- Click Finish when the setup process has completed.

If you purchased CMD as a download:

- During program download, we suggest that you place the various files for installing CMD into one folder on your computer so that you can easily find them once they have been downloaded from our web site
- Once the files have been downloaded, click Start | Run. When the Run dialog appears, click Browse. Navigate until you find the file you downloaded named **CMD2006.xSetup.Exe**. Click on it, then click Open, then click OK when you are back at the Run dialog.

  This will start the Setup program which will transfer the system files to your CMD2006 folder. Even though the setup program gives you some options for program folder and path, we strongly urge you to **use the defaults the setup program provides for you**.
- Click Finish when the setup process has completed.
- You may wish to burn a CD with all the setup and documentations files associated with CMD for 2006 in case you need to re-install or setup the software on another computer.

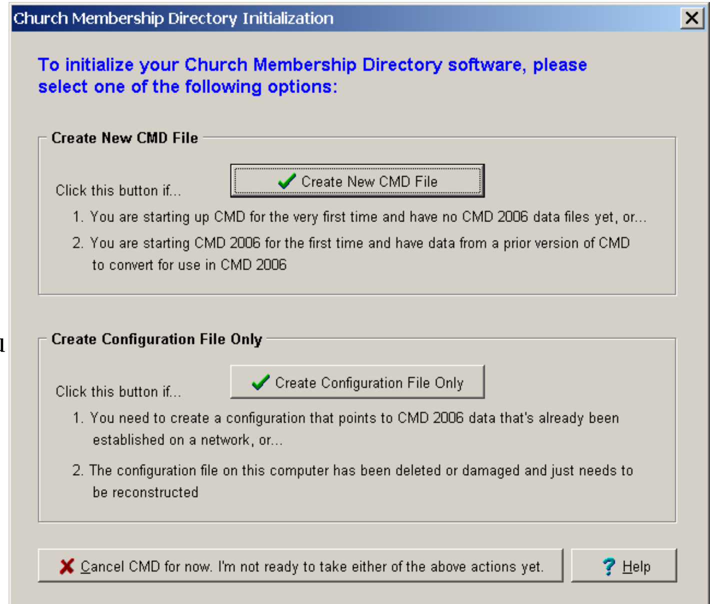
Always check for Startup Notes or any New Features Guides that are on the CD or on the download page on our website to see if there is any additional information about which you should be aware since the manual was last updated.

Installation Step 2 - Software Initialization

The software initialization process tells CMD to create a separate folder for your data, and then places all the data files there which will hold all the information you will enter into your CMD system.

NOTE: This initialization is required if you are a first-time user, or if you are updating from a version prior to CMD 2006.

Initializing CMD



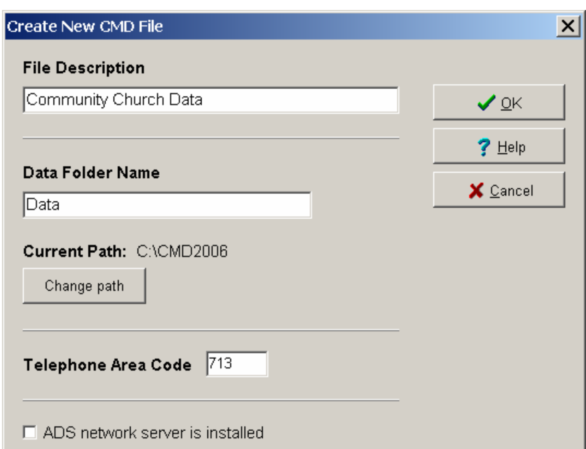
To start up the CMD for Windows program, find the CMD 2006 icon that was placed on your desktop during the setup process and double-click it.

When CMD 2006 starts for the very first time, the Initialization dialog is displayed to guide you in setting up this version of CMD for the first time. In most cases, you should click the **Create New CMD File** button.

You'll need to do this if this is your very first experience with CMD or if you are updating from a prior version of CMD (you still need to initialize the data files for 2006).

Create A New CMD File Dialog

Once you've clicked Create New CMD File, the Create dialog appears. Enter a **File Description** of up to 30 characters for the database you are now installing using some descriptive phrase which identifies the group of names to be stored in the data files, such as "First Church Data Files." Even if you think you'll only be using one database with CMD right now, you might decide to install additional files in the future. This description is what helps you tell at a glance which data file set you are working with.



Once you've entered the description, press TAB to move to the **Data Folder Name** field.

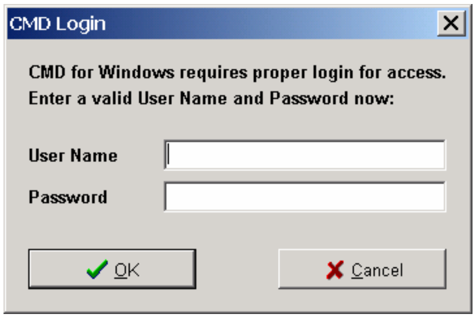
We've chosen **Data** as the default name for the folder which will hold all your data files, but you may erase it and type in any valid folder name. By default, this data folder will be created as a sub-folder of your CMD 2006's system folder.

Though we don't recommend it, you may change the drive/path designation by clicking the **Get Path** button and using the standard Windows Browse folder dialog to find another folder under which the data folder will be created.

You may also enter the **telephone area code** of your church, which makes data entry smoother. While you can enter the area code using the Preferences Menu, it's easiest to do it while you are here.

Once the Description & Data Folder Name fields are like you want them, and you've entered your area code, click **OK**. CMD will then create the data folder and set up the database CMD will use to store the information you enter. When it's done, a dialog will appear telling you that the installation process is finished, and instruct you about logging in to CMD so that you can begin using it.

Login for the First Time



CMD employs a user name and password system that is designed to give your CMD data solid protection against unauthorized access. When the data files are first created, a default User Name and Password are also created, **and they must be used the very first time you attempt to access CMD's data files after initialization.**

The default User Name is **admin**, and the default Password is **password**. Enter these values in the appropriate fields and then click OK. You will have three chances to enter the user name and password correctly before CMD halts the program.

Chapter 2 provides complete information on Users, Passwords, and Security. We highly recommend that you read Chapter 2 over next and assign users and passwords right away.

Converting Prior CMD Version Data

In *most* cases, you can convert and import data from prior versions of CMD into CMD 2006. **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**.

The process for converting and importing is generally quite easy, but you will have to follow the steps exactly for importing the data from your current version. **You cannot simply backup and then restore prior version data into CMD 2006**. If you do, you'll have to start the installation procedure all over again!

In all cases, you must first have installed CMD 2006 on your hard disk and created the new data file set using the Create CMD Data file process using the Software Initialization step detailed on page 4. If you have not completed those two steps yet, do *not* proceed with converting/importing because the process will fail!

The security provisions in CMD 2006 differ substantially from most prior versions of CMD where password protection was written into each CMD program's configuration. You'll need to read over the information in Chapter 2 starting on page 11 for specific information on how security is implemented in CMD 2006.

Backup First!

Before you begin, please go immediately into your prior version CMD program and make at least two backups of your data **on separate media**. Please do not skip this step! We can help you recover from most any problem if you have a backup!

Import CMD 2004 or 2005 Data

Do not simply attempt to backup your CMD 2004 or 2005 data and restore it in CMD 2006! Import your existing CMD 2004 or 2005 data using these steps:

- Start CMD 2006 and login.
- Click Utilities | Import CMD 2004 Data or Import CMD 2005 Data.
- When the Import dialog appears, click the **Get Path to CMD 2004 or 2005 Data** button. Use the standard Windows Browse dialog to navigate to the actual data folder of the data you wish to convert. 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.
- The import process *does not* preserve user names and passwords. Those will have to be re-defined in CMD 2006.

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. **If CMD 2006 locks up or if you get an error message** of any sort during the conversion process, it may mean that one or more of your data files are out of sync with one of the other data files. In this case, we will need to do the conversion for you.

Import CMD 2002/2003 Data

The data file formats for CMD 2002 and 2003 are the same, so there's one import procedure for both versions. Follow these steps:

- Start CMD 2006 and login.
- Click Utilities | Import CMD 2002 & 2003 Data.
- When the Import dialog appears, click the **Get Path to CMD 2002/2003 Data** button. Use the standard Windows Browse dialog to navigate to the actual data folder of the data you wish to convert. 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.

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. **If CMD 2006 locks up or if you get an error message** of any sort during the conversion process, it may mean that one or more of your data files are out of sync with one of the other data files. In this case, we will need to do the conversion for you.

Import CMD 2001 Data

The process is basically the same as listed for the 2002/2003 or 2004/2005 import. You'll just use a separate dialog because the conversion needs are different internally. That dialog is found by clicking Utilities | Import CMD 2001 Data.

If the program hangs or if an error message appears, don't panic. Just contact us and we'll make arrangements for you to send us your data so that we can convert it for you.

Converting CMD 98, 99, or 2000 Data

If you are still using CMD 98, 99, or 2000, we may need to do the data conversion for you. But you can try it yourself first without any harm if you'd like.

Before you attempt the conversion yourself or send us your data for conversion, there are some things you will need to do to clean it up first. The conversion process for CMD 98-2000 requires that each name be in a valid family unit. This means that both their Family Status and Family Tie fields must be correct and link into a family.

- To check this out, go to Print Names, click the third tab page, select Family Status. Select Unknown as the choice. Go to Print Control.
- Once at Print Control, change the Output Form to Record Number, check Invert Name, uncheck Include Family Tie, uncheck Use Label Info if Available, check Include Names with Blank Addresses, and print the list to printer.
- Go back to Print Names Field Select, go again to the third tab page, select Family Status once more, this time selection Undefined. Go to Print Control and print that list.
- If there are any names on either list, you'll need to go into Update Names and update those names to be in a family unit. For some, that will mean just making them Head of Household. For others, it will mean making them a spouse or dependent. If they are a spouse or dependent, make sure they are correctly tied to a Head of Household using the Family Tie field.

  Whatever the case, DO NOT leave any Unknown or Undefined for Family Status! Do not change a name to dependent unless you can tie them to a Head of Household or Spouse.
- After placing all names correctly into family units, go to the Utilities Menu in your old CMD program and select the item to Rebuild or Refresh the Family Relationships file (it will be worded differently in different versions).

Once this is done, you may **try the conversion** yourself. Click Utilities | Convert Old CMD Data. When the Convert Old CMD Data dialog appears, use the directory tools to navigate to the folder where the data is stored. Once there, click the **Begin Conversion** button to begin the process.

If the process breaks anywhere during the conversion, you will probably need to send your data to us. However, new files were added as each version came along, **so it is possible that all the relevant data was converted.** If you get a break in the conversion, exit CMD then restart it. Check in the Enter/Modify/Delete Names dialog to see if the data that is most important to you is there.

If not, e-mail us with a copy of your data, tell us the version you were using, and request a free data conversion. We'll do our best to convert your data and then return it to you in a form that you can then restore into CMD 2006.

Using CMD on More Than One Computer

The license you get with CMD allows you to use the program on as many computers in your specific ministry setting as needed, whether in the church office or in the homes of your pastors or members. **If you give, loan, lease/rent, or sell CMD to another church or ministry setting outside your own, then you are breaking our license agreement, and you are violating copyright law. Please honor our commitment to provide this ministry tool for a fair price by keeping it only for *your* ministry setting**!

Important Tips!

If you intend to use CMD on a number of computers that are *not* connected by a network, you need to be aware of several things:

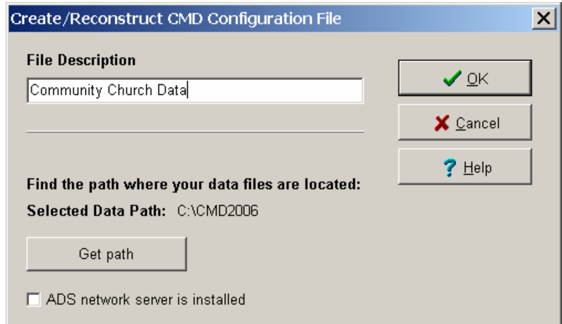
- You can freely backup CMD's data from one computer and restore it onto another one
- You can backup from any computer and restore onto any other one at any time
- You **cannot** enter data at separate computers and then "merge" the data together! Whenever you backup from one and restore it onto another one, the data on the machine receiving the restore is **always overwritten completely** by the data coming from the computer from which the backup came.
- If you have a number of computers in a church office that need to use the data, we highly recommend that you set up a network so that each computer in the office can work with the same physical data at the same time! Such hardware is inexpensive and easy to install. See Chapter 22 starting on page 181 for specific instructions for setting up CMD on a network.

Recreating Your Configuration File

On page 5 the Initialization dialog has a second option in addition to Create New CMD File. It's called **Create Configuration File Only** and is generally used in one of these circumstances:

- Your CMD's configuration file has been corrupted and you need to re-create it so that you can get access to your CMD 2006 data
- You need to setup CMD on a network, and the data files have already been initialized on some other computer or network

When you click the Create Configuration File Only button, this dialog appears: (see next page)



While it is similar to the Create New CMD File dialog, it's only function is to help CMD find the data already setup somewhere on your computer or on a network.

Click the **Get Path** button to bring up a standard Windows Browse dialog to browse for the folder or location on the network where the data resides. Click OK once the data has been found, a new configuration file will be created, and you will be able to connect to the data.

2
Users, Passwords, & Security

CMD for Windows has a whole slate of features for data security, privacy, and protection. These security features are actually embedded in the physical database itself, and are equally enforced regardless of your type of setup. Whether you use CMD on a standalone computer, use it on a network with a server, or use it in a peer-to-peer network, the protections are the same.

Further, if your practice is to backup CMD data and manually carry it to another computer where it is restored and used, *the very same protections defined where the data was backed up will be in force when you restore it on another computer*.

If you have created more than one set of CMD data files, users, passwords, and restrictions will need to be defined for each data file set separately. They, too, will remain with the database wherever it is installed and used.

Users & User Groups

What makes all the security and privacy features work are **Users** and **User Groups**.

A "user" is any person allowed to have access to CMD. When you tell CMD about a user, you will assign a "user name" for that person, give them a password (which they can change anytime later on).

"User Groups" dictate the level of access that any given user has. Each user name that is created for CMD is placed in one of the following seven user groups:

- Administrative
- Full Access
- Full Access without Contributions
- General Access
- General Access without Contributions
- Front Desk Full Access
- Front Desk Read Only Access

Details about the rights and privileges granted to users in each of the above user groups are outlined on page 13.

CMD Login

In normal use, you will need to provide a user name and password when CMD first starts up in order to gain access. If a correct user name *and* password are entered, CMD continues its program execution and you can use the program according to the rights granted the user by virtue of their user group membership. If the correct user name and password are *not* entered, you'll be given two more opportunities to enter the correct information before program execution is immediately halted.

You may, at your discretion, elect *not* to enforce user logins. **Keep in mind that if you do *not* enforce the login, your CMD's data is not protected in any way**.

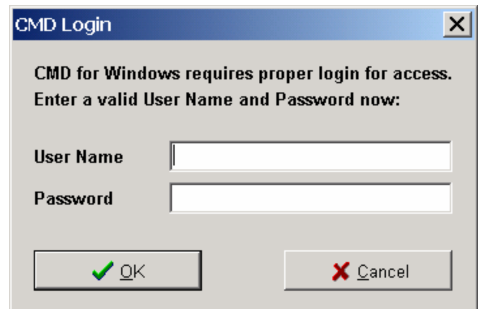


Figure 2.1. The CMD Login appears whenever you try to access a CMD database.

This may be appropriate if you use CMD on a standalone computer, don't share the data with anyone, and access to the computer itself is limited.

If, however, CMD is installed on any computer that can easily be accessed by others, **we highly recommend that you maintain a login requirement for gaining access to CMD.** If you leave it unprotected, someone could enter CMD, find their way to the dialog where protections are defined, and actually lock you out of your own data!

Default User & Password

When you create a new CMD Data File, CMD pre-defines one "administrative" user and password. For a brand new CMD database, the pre-defined user name is **admin** and the password is **password**.

Immediately after you've created a new CMD database, you'll be asked to login. When you see the login dialog, enter **admin** and **password** in the appropriate blanks and click OK. Assuming you entered admin and password in the correct places, the login dialog will disappear and the blank program screen will be displayed.

An Important First Step

An administrative user is the *only* kind of user who can gain access to the dialog where users are added or removed and where the various access rights are granted. **It is important to immediately establish a brand new, administrative level user name and password.** Once you've defined it, exit CMD then re-enter CMD and login using the new administrative user name and password to make sure it works properly. Once you have tested this new administrative user name and password, you should then either update the default admin user name with a new password or delete it entirely because admin and password are common defaults and thus don't provide much protection. **However, make *sure* your new administrative user name and password work correctly *before* you alter the defaults or you may lock yourself out of CMD and will have to call us for help!**

To add or delete users, you'll be using the **User Administration dialog**. Administrative level users can access it by selecting Preferences | User Administration.

User Administration

The **User Administration** dialog is available *only* to users who have logged in to CMD as an Administrative user. The default user that is created when you first create a new data file, **admin**, is assigned to that group, so this function is available to you when you first start up. Following is an explanation of the items on the User Administration dialog:

Login

The first choice to be made is whether or not the login is to be enforced. By default, the **Login Required** is checked. **We suggest you leave it that way!**

User Groups

Listed next are the available user groups which are defined for use in CMD. To the right of the list is a brief description of the rights and permissions accorded to members of the selected group. The details about each group's rights and permissions:

- **Administrative**. Users assigned to this group have access to *all* CMD program functions and data, and are authorized to have access to the tools that can change the configuration, and access to the administrative tools that can change passwords, and add or remove users.

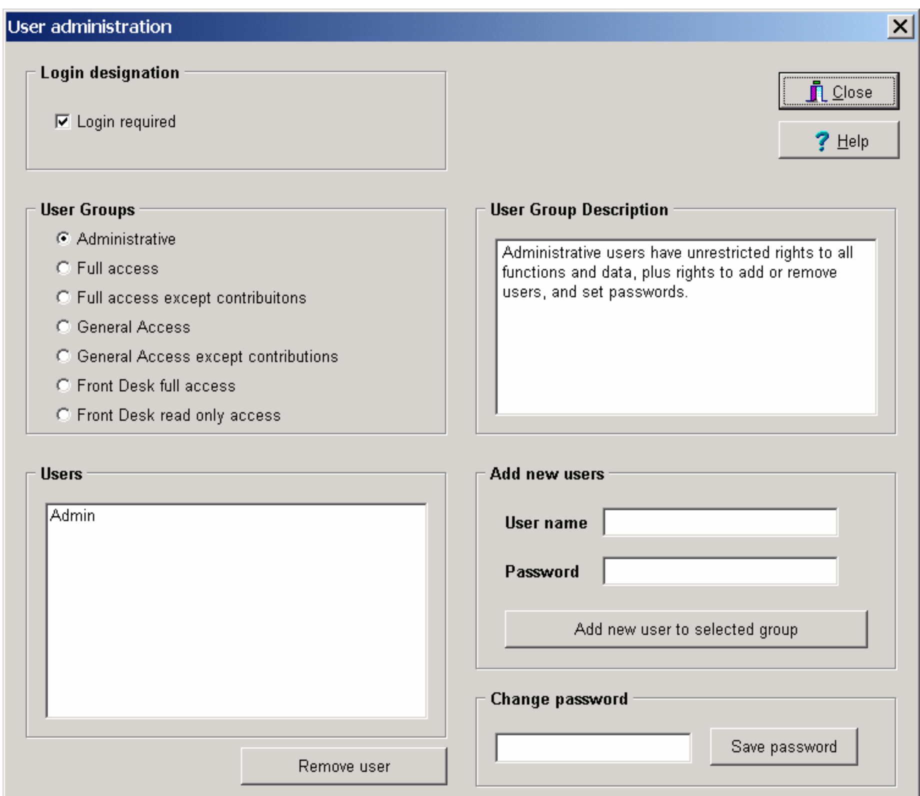


Figure 2.2. The User Administration dialog has the tools to add or remove users, change passwords, and set user rights.

We recommend that the number of people assigned to this user group be very small! Only need-to-know persons using your data should be assigned to this group. You may wish to keep **admin** as a valid user name. If you do, change its password! If you wish to remove admin as a user, first create a new Administrative user and test out its access to make sure it works *before* you delete admin! Otherwise you may find yourself unable to regain access to the User Administration dialog to make any more changes!

- **Full Access**. Users in this group have access to all CMD program functions and data, but cannot access the configuration or user administration tools.

  This is a good group in which to place members of your pastoral staff or others who should have full access to even the most confidential information but who need not tinker with the configuration or don't need to add or remove users.

- **Full Access without Contributions**. Users in this group have the same privileges as Full Access users except they cannot access any contributions functions or data.

  It may be that in your setting, even pastors shouldn't have access to giving records, but otherwise need access to everything else.

- **General Access**. Users in this group may access all program functions and data except for comments and visitation information. Those fields appear blank on the screens of General Access users, and these users cannot enter or delete comments or visitation.

  This is a good user group for a church secretary to be placed in if the pastoral staff or certain elders in the congregation make extensive use of the comments fields or enter visitation information. Since notes from a visit or comments about an individual or family are likely to be more sensitive, confidentiality can be maintained by assigning non-pastoral users General Access.

- **General Access without Contributions**. In addition to the limitations of General Access users, users in this group cannot access any contributions functions or data.
- **Front Desk Full Access**. This user group allows access only to the Front Desk program, including the rights to update information displayed in Front Desk. Access to the full CMD program is not permitted for these users, only Front Desk.
- **Front Desk Read Only Access**. This user group allows access only to the Front Desk program and cannot alter any of the data displayed in Front Desk.

Viewing Users Assigned to a User Group

As you select different user groups in the User Groups box, the list of users assigned to the selected group will be displayed directly under the User Groups box in the Users box. Users listed for any group are automatically assigned the privileges and limitations for their particular user group.

Adding a New User

To add a new user, first click the User Group to which the new name is to be assigned. Then enter the user name you wish to add and type in the password in the **Add New Users** box.

The user name can be a full name, a nickname, a first name, or most anything. It just needs to be easily remembered and entered by the user. You may enter it with upper and lower case letters if you wish, however, case is not considered for either user name or password on login.

Note that a particular User Name can only be assigned once in the entire group of user names. So use unique names when adding a new user name.

When the user name and password are what you want them to be, click the **Add New User to Selected Group** button. The name will be immediately added, and the list of users for the selected User Group will be updated.

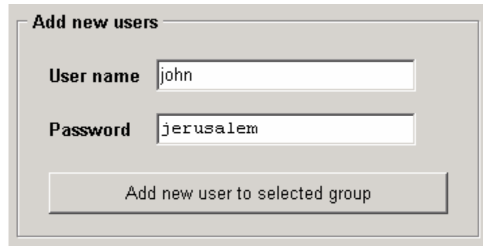


Figure 2.3. The Add New Users section of the User Administration dialog.

Changing a Password

There are actually two options for changing a password. Each valid user can change their own password at any time using the **Change Password** item on the **Preferences Menu**. You can also change it for them here on the User Administration dialog.

To change their password here, click on their user name in the Users list, type in the new password in the **Change Password edit box**, then click **Save Password**. Their new password is immediately in force.

Delete a User

If you wish to remove a user from the Users list, click on the user name and then click the **Remove User button**. The effect is immediate. The next time the deleted user attempts to login, they will be denied access.

Changing a User's User Group Designation

There is no direct way to change a user's User Group designation. You'll need to just delete the user name and then re-enter it after selecting the desired group.

The Back Door

In the interest of full disclosure, we have included what is known as "back door" access to any CMD database. It is not uncommon for us to need to work with your data from time to time, provide CASS certification services, help you debug a problem, or just help you walk through a specific program feature or function. In most cases we can solve the issue more quickly if we are viewing the data that you are working with.

The back door enables us to get the access we need to any data sent to us in order to provide the requested help. It also allows us a way to help you should you ever mess up your user administration and find yourself locked out of your own data!

Data sent to us is *never* shared with anyone else, and is rarely kept on our computer for more than a few days. No use will ever be made of any of the data you send to us except for what must be done in order to respond to the issue at hand.

Final Words

We strongly recommend that you take the defining of user names and passwords very seriously. The limitations and permissions are a very powerful tool for protecting your data. Your church members deserve every reasonable precaution you can take to keep their information private and secure.

While no protection scheme is perfect (including this one), it will be extremely difficult for any but the most experienced and determined hacker to find their way in.

We are interested in your comments regarding the user groups' rights and limitations. Given the number of fields that CMD uses, there could be a very large possible combination of user rights and permissions that could be created. We've tried to provide user groups that seemed to be reasonable and appropriate for general use. If you can think of others more suitable for your needs, please let us know what kind of alterations you'd like us to make. As with other parts of CMD, we do our best to make reasonable accommodation for our users wherever possible.

3
Getting the Most from CMD

This chapter is a combination of general tips, tricks, shortcuts, and features in CMD that can help you get the most out of it. Many of these become obvious as you use the program; others won’t be noticed unless you read about them here or elsewhere in the manual.

The information gleaned here will likely save you much more time in the long run that it will take to read through this chapter!

What to Do When you Need Help

There are **three ways to obtain help** when using CMD:

- On-line, context-sensitive help is available throughout the CMD system whenever you press F1 or click the **Help** button. The Help button may bring up a general help topic for a given dialog if there is some complexity to it, but you’ll see cross-links to specific help when it’s available. Pressing F1 will give you the most specific help based on your current place in a dialog or process when more specific help is available.
- This manual will give you much of the detailed information you’ll need.
- Call or e-mail us for help. Because of our own commitment to ministry, e-mail is the preferred method. But we will answer the phone as we are able. Our e-mail:

info@softwareforministry.com

Software for Ministry reserves the right to alter its support policies at any time without prior notice.

Data File Backups

If you’ve used computers much, you probably already know that it’s not a question of *if* something will go wrong, it’s a question of *when*! While we make every effort to provide you with bug-free software, there will be times when you might run in to an error in the program. There might be times when one or more parts of your computer don’t work correctly. There may be times the electrical system in your church will deliver a surge or a brown-out. Many things can cause something to go wrong with a computer and its software!

Because of this, we urge, implore, beg, hope, cajole, and desperately wish that you will make regular backups of your CMD data. (***Do you get the idea that we think this is VERY important???***).

You will not need to keep additional backups of the CMD system files since you either have a CD of the program or you have the download version in a folder somewhere on your computer. Your data, however, isn't so easily replaced! Even if you have a major problem with CMD, good backups assure that you will rarely lose more than a small portion of your work.

Backing up your data is so important that we have provided an **integral Backup and Restore system** built right into CMD complete with data compression. You'll find it discussed thoroughly in Chapter 21, which discusses the **File Menu options, starting on page 173**. In addition, we've provided for **automatic backups**, and **backup reminders** based on triggers that you determine yourself. These are discussed in Chapter 20, as an item in **the Preferences Menu**.

Preferences

CMD provides many user-definable features that allow you to tailor much of its functionality to your specific ministry setting. While defaults are provided for most of these preferences to get you up and running quickly, they can be easily changed as you begin to think of new ways to use CMD in your ministry. All are detailed in the chapter on Preferences, but for now, here's a list of preferences that you can change at will to suit your needs:

- Up to 300 choices *each* on most menu-oriented fields (more on menu fields below)
- 3 user-definable, user-namable menu fields
- 1 user-definable, user-namable text field
- 4 user-definable, user-namable date fields
- List of titles (Mr, Mrs, etc)
- List of Marital Status choices
- List of return addresses
- List of attendance events

You may find it advantageous to spend a little time thinking about the preferences available to you *before* you enter a lot of data into CMD. This may save you some time updating later on!

Notes on Menus

CMD allows you to define the actual menu choices for most of its menu-oriented fields. For the **Membership Status, Affiliation, SS Division/Class, Offices, Talents, Activities, User 1, and User 2 fields,** you may specify your choice of up to 300 different menu choices for each of these fields. The **User 4 menu is set aside to track Ethnicity** by default, but this field can be renamed for another purpose if you don't wish or need to track ethnicity. The User 4 menu offers up to 10 choices for you to define, and the **Archive Leave Reason** allots you five. The choices are defined by selecting the **Menu Items (pick lists)** option on the **Preferences Menu**.

During installation, CMD provides default choices for each of these menus. You may, however, specify the default menu choices for both the Membership Status and SS Class/Division fields, or you may elect to keep the default suggestions. Here's some **hints** which might be helpful:

- **SS Class/Division Menu**: You may wish to enter each of your children's *SS Divisions/ Classes* as a separate menu choice, and then enter your adult division showing the class instead of having one line that simply says "Adult." This means you could enter adult classes as Adl-Smith or Adl-Jones for classes taught by Ms. Smith or Mr. Jones.
- **Talents Menu**: You may wish to use this menu to track musical, artistic, and practical talents and hobbies and use *User 1* or *User 2* to store spiritual gifts.
- **Membership Status Menu**: The suggestions provided for *Membership Status* are based on input from many of our users. We recommend that your list at least include choices for Active Members, Inactive Members, Homebound Members, Non-member attenders (spouses or children not yet received into local church membership), Out of Area Members (those who keep membership at your church but who have moved out of the area), Interests, Area Clergy, and Area Churches. These choices will enhance your ability to print a wide variety of useful reports.

Postcards and Rotary-style cards

Printing Postcards can be a quick and inexpensive way to communicate with various groups in your church. For example, it may be much quicker and less expensive to print postcards to remind board members of an upcoming meeting than writing, copying, stuffing, labeling, and stamping a letter-based announcement.

CMD uses 3 different postcard sizes and two rotary-style card sizes:

- **4 x 6 inch postcards**. Use Avery #5389 for 4 x 6 laser postcards. You may also simply use heavy card stock if your printer will handle the form's weight. You can then use your paper cutter to trim away the edges and then cut the cards in half. This will save significant dollars over using Avery's postcard stock form.
- **3.5 x 5.5 inch cards**. Use stock number PC5B6 from BlanksUSA for the 3.5 x 5.5 cards. See their website at www.BlanksUSA.com.
- **Pre-stamped USPS postcards**. These cards may be purchased at any US Post Office for the face value of the postcard postage.
- **Rotary-style cards**. For the small rotary-style cards, try Avery #5385 for laser and inkjet printers. The Rolodex company makes 3 x 5 size cards for laser and inkjet use.

Name Search Dialogs
Many times through the normal course of using CMD, you will need to access individual names or find a family to view, update, or delete some data, update attendance, enter visitation dates or comments.

CMD uses different search dialogs for finding families and for finding individuals. Both are illustrated on the next page. When using either of these dialogs, you'll see a text entry box along with a list box displaying the first few names in your list. To find any name or family, simply begin typing in the letters of the Last Name of the person or family for whom you are looking. With each keystroke you enter, you will be taken closer in your list to the name or family that most closely matches what you are typing. When you have found the name, double-click on it, or click on it with the mouse pointer and then either click **Call Name** or **press RETURN**. *Note that a name MUST be highlighted in order for the name to be called.*

From the Individual Name Lookup dialog you may also print an envelope addressed to the name,

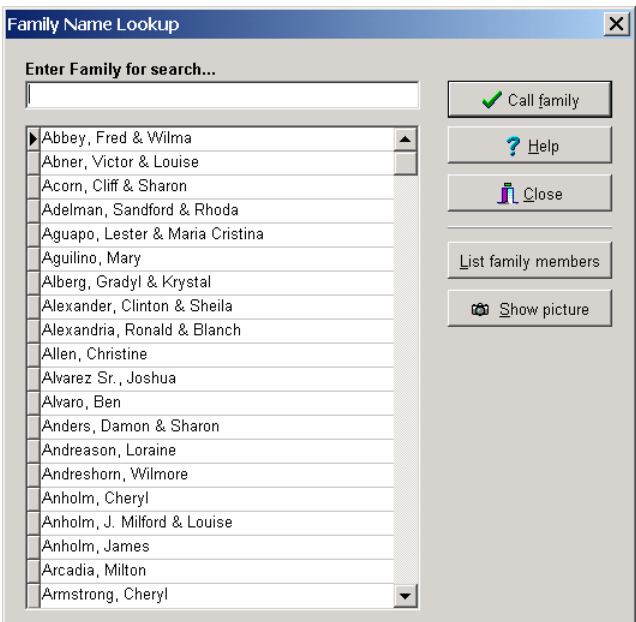
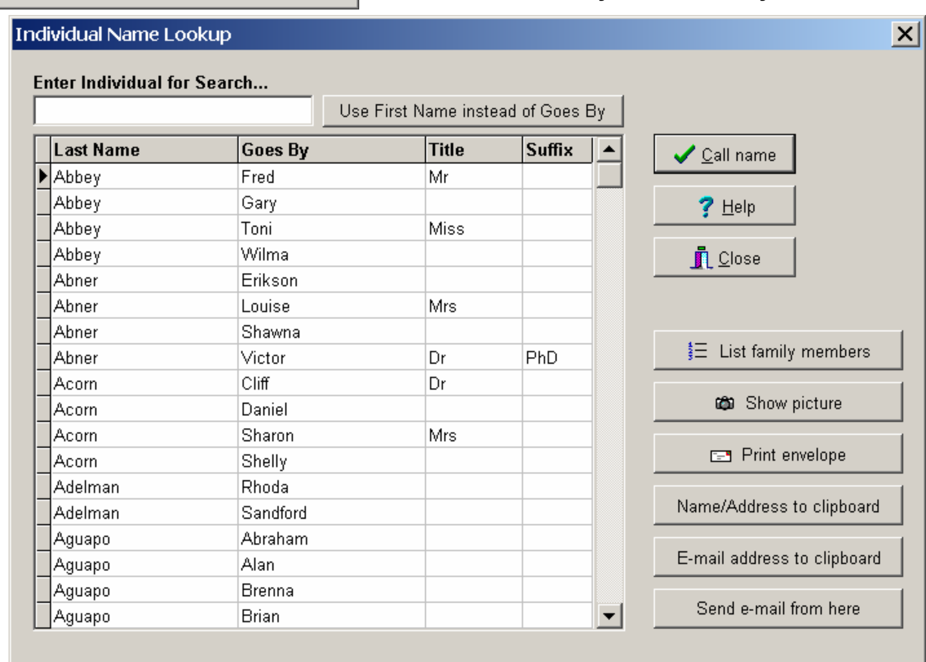


Figure 3.1. The Family Name Lookup dialog allows you to locate a family record using the Family Name field.

Figure 3.2. The Individual Name Lookup allows you to search for an Individual by their last name. This is the dialog used in Enter/Modify/Delete Names. However, you'll find similar screens in other parts of CMD that work in essentially the same way.



display their picture if available, send some of the information to the clipboard for use in another program, or send an e-mail through Outlook addressed to the highlighted name.

Grid Column Adjustments

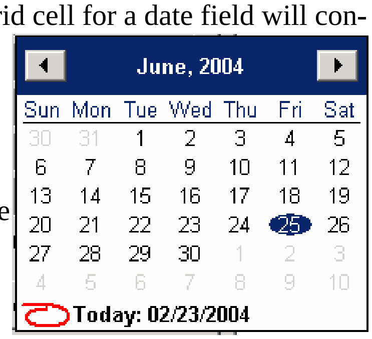
There are numerous grids used to display data throughout the CMD system. The column spacing in each grid may or may not be appropriate for your computer's display adapter resolution and font size properties.

In most cases, you can resize the columns by grabbing the vertical lines in the column headers and dragging them to the correct column width for your computer. The program will remember your settings when you next return to this dialog.

Note: Some grids in CMD do not yet have the ability to remember and restore your personal column settings. We are in the process of gradually changing all the grids over to have this capability.

Working With Calendars

Many dialogs require the use of dates. In most cases, the edit box or grid cell for a date field will contain an icon that you can click which will display a pop-up calendar. When it displays, you can select the date by clicking directly on the day you wish to select.

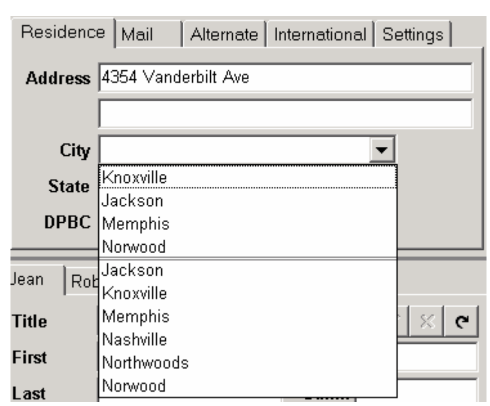


If you need to select a different month, either click the scroll icons in the upper left or upper right corner of the calendar, or click your mouse pointer directly on the month name in the calendar heading to reveal a list of the months. Click directly on the month you need.

If you need a different year, click directly on the year in the calendar heading to see a list of years from which you can choose. If the year you need does not appear on the list, select the month and day you need and then manually edit the year after the calendar disappears.

History Lists

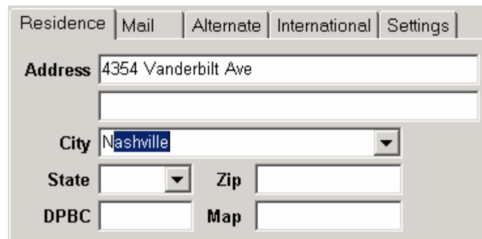
A number of fields on the Enter/Modify/Delete Names dialog use an edit control that remembers the list of past entries for that particular field. Whenever you use such a field, it makes what has been entered in the past available in one of two ways.



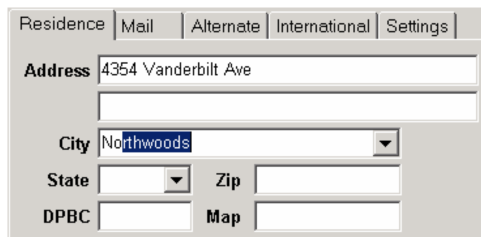
First, you may simply click the icon on the right edge of the edit box and a drop-down list which contains a list of all the past entries is displayed. The top portion of the list shows a few of the most recent entries. You can select any item from the list that you wish to use in the field.

Or, you can just begin to type in the word you wish to enter. When it senses a match with however many letters you have entered, it will present the first matching item from past entry as the suggested entry. As you add more letters to the word, it will move deeper into its list if there are more matches available. At any point you can select the suggested entry just by press TAB to move on to the next field. Let's go through an example to illustrate how it works. We'll use the City field in the Family Data area of Enter/Modify/Delete Names.

Let's say that the family lives in a town called Norwood. So, when you reach the City field, you type the letter N. The first match in the history list for the City field is Nashville. So, the N is recorded, and the balance of the word Nashville is filled in automatically for you. Note that all letters after the N are highlighted, which means that you can keep typing and those letters will be replaced by any new letters that you type.

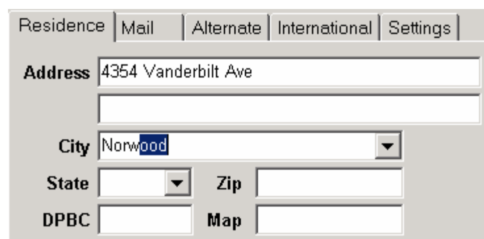


Our town is not Nashville, it's Norwood, so we need to add the letter o next. So we type it in and now our City field shows Northwoods. We've just moved a bit deeper into the list but we're not there yet.



Now all the letters after No are highlighted, so we can add more letters, this time an r and then a w.

Now we see Norwood. Even though we've not finished typing in the entire word, we see that it's already there, so we can just press TAB to finish the entry and move to the next field. You only need to type in as many letters as are needed to find the match and then you can press TAB.



Editing History Lists

You may not wish to keep all the choices on a given history list. A good example of this might be that you had to enter a town's name just ahead of your own town's name for one name, and the name of the seldom-used town now appears before the town's name you most often enter. To remove the seldom-used town's name from the list, double-click directly in the history list field you are working in and use the dialog that pops up to remove the desired choice. Click on the offending item and press the Del key.

You may also manually add an item to a history list. If you need to correct the spelling of an item, delete it then re-enter it using this dialog.

History list fields currently available on the Enter/Modify/Delete dialog include City, State, & Occupation. The other fields that have an icon at the right edge are menu fields whose choices are defined with the Menu Items choice on the Preferences Menu.

Updating Menus on the Fly

If you think of a new menu choice that you'd like to have available on one or more of CMD's menus while you are entering information in the Enter/Modify/Delete Names dialog, you don't have to leave what you are doing and go to the Preferences Menu to add the new choice.

While working in any menu-oriented field, double-click directly in the edit box and the Preference dialog that allows you to edit the menu fields (sometimes called a Pick List) will appear and you can make the change right on the spot. The choice will become immediately available to you. Be sure to click the Save button before leaving the menu field Preference dialog.

User Nameable Fields

A number of CMD's fields can be renamed to designate the use for them that you desire. To change these names, select the **General Preferences** choice on the Preferences Menu.

There is a practical limit to the number of characters that can be displayed properly in the various forms that CMD uses, so you are limited to 12 characters for the user-namable fields. Note that the new field name will be in force for all the individuals you store in your database. In other words, you cannot name a given field differently for different individuals. Any user-definable field name will be displayed the same on all dialogs and printed forms.

Pictures

Currently there are a number of places in which pictures can be used in CMD:

- **Family Picture**. This picture can be displayed when you are on the Enter/Modify/Delete Names dialog, and is the one used when you print a pictorial church directory.
- **Individual Picture**. This picture can be displayed when you are on the Enter/Modify/Delete Names dialog, and is the one used when the Child Registry and Rap Sheet pages are printed.

Each report that includes pictures prints them in roughly the same size, and always in exact proportions. That means that **it is critical to use the appropriate size, resolution, and format for pictures entered into the CMD database. If you ignore the guidelines we specify, you will likely end up with error messages or stretched proportions when you attempt to print or view pictures.**

Dimensions and Proportion

- *All* CMD pictures should resolve to a 2 x 2.4 (H x W) dimension. If you wish to make sure there is adequate detail, you may wish to crop the pictures slightly larger, but in the same aspect ratio. For example, 2.5 x 3 or 3.33 x 4 would also work. In our testing, we could not see any difference in pictures saved larger than 2.5 x 3.
- Use 250 ppi for the resolution.
- Use JPeg format images *only*.

Since CMD does not provide any photo edit functions, we recommend that you obtain suitable picture edit software such as ULead Photo Impact, or Adobe Photo Elements to make the size, resolution, and format changes. CMD only has the functions needed to acquire and print photos.

While not intended to be a plug for Adobe's product, the following screen grab from Photoshop Elements 2.0 shows where you set the dimension and resolution when the Crop tool has been selected:

Backup Implications

Adding pictures to your data file will swell its size in short order. This has implications for your backup procedures. Because of the nature of the new security features in CMD, we've altered the backup process to always backup all the data files together. This is enforced because when the data files out of sync, your data base will no longer work. So you cannot backup your pictures separate from the rest of your data.

This means that you are going to have to have media that can handle the increased size of your data files. Among the solutions available: backup onto a Zip disk, onto a CD-RW (not a CD-R), backup to a network drive, or use one of the pocket flash devices that attach to your system via a USB port. Any of these options work well. Just make sure that you make good backups!

4
Enter/Modify/Delete Names Dialog

The workhorse dialog in CMD is called **Enter/Modify/Delete Names**, and is accessed by selecting **Enter/Modify/Delete** on the Names Menu, by clicking its speed button, or by pressing **CTRL-E** from a blank CMD screen.

Several important functions happen on this dialog that cannot be done *anywhere* else in CMD:

- Adding a new family to the database
- Adding family members to a family along with appropriate data
- Removing (deleting) a family or family members from the database
- Moving an individual from one family to another
- Placing deleted names into the Archive file so that they can be included in a clerk report
- Updating of all family or personal information
- Entry of visitation information, and comments (individual and family)
- Entry of child registry information

Because all families and individual names must be entered here before they can be printed or used in any other way, *do not attempt to use any other system command without first entering some names.*

When you first arrive at Enter/Modify/Delete *before* you've entered your first family, all the data fields will be blank. When you arrive here *after* you've entered some families, the information for the first family in the list will appear in the data fields.

At first glance, the appearance of the Enter/Modify/Delete Names dialog looks busy! That's because a lot of fields and functionality is packed into this one page. But once you've had a chance to use it for awhile, its layout will become familiar, and you'll find yourself working with it easily. You'll actually begin to appreciate having so many features and fields accessible on the same page because it will make your data entry work more efficient.

On the next page is a screen grab of the Enter/Modify/Delete Names dialog.

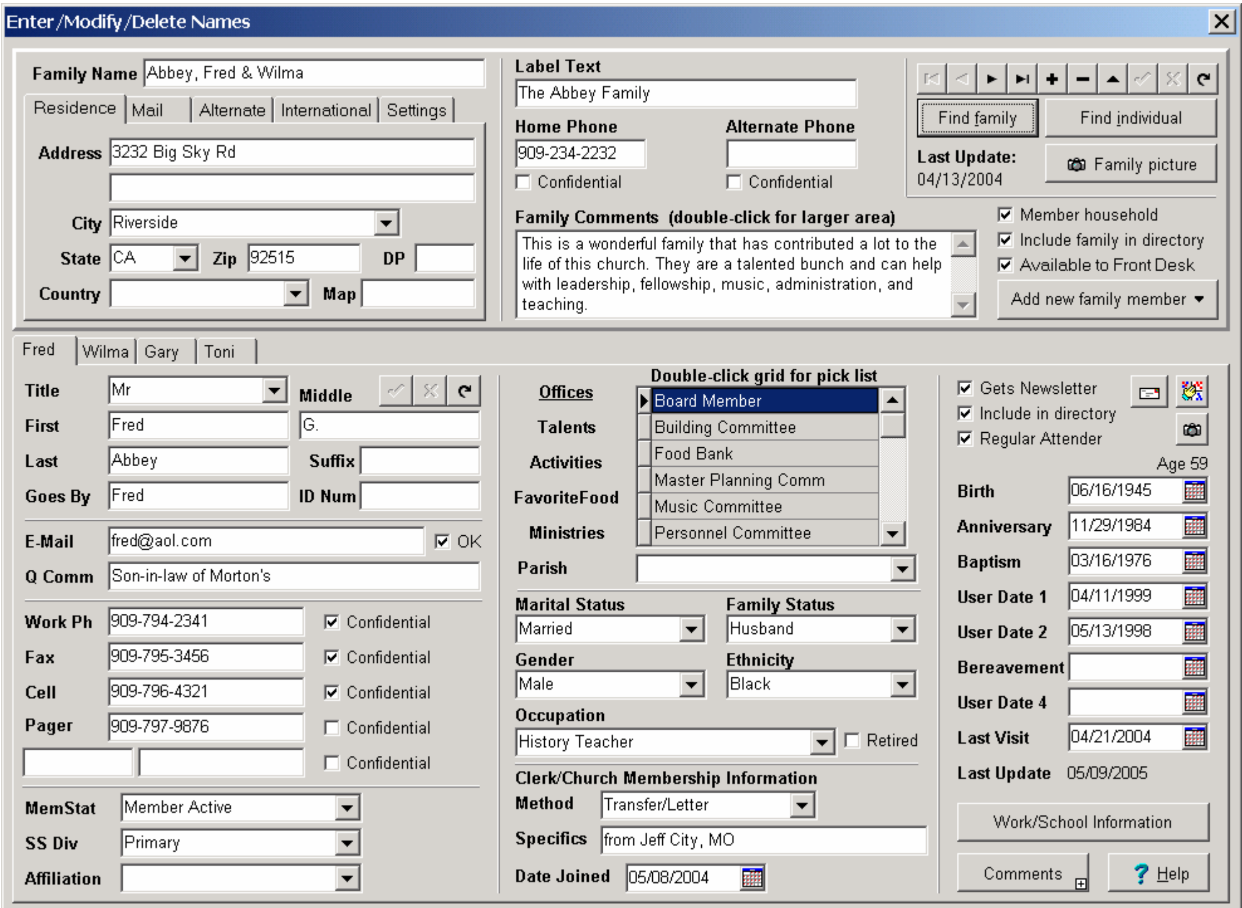
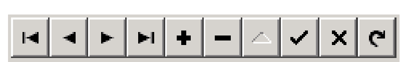


Figure 4.1. The Enter/Modify/Delete Names dialog. In this screen shot, three user fields have been renamed (Favorite Food, Ministries, and Parish), and one User Date has been renamed (Bereavement). Note that each individual in the family has their own tab page. Clicking the tab of an individual's name will display their information.

Finding a Family or Name

There are several ways to move around in the data file to locate a family or an individual in your data file:

- Use the "navigation bar" which looks like this: 

  The first four buttons move forward or backward through the list of families. The + button allows you to add a new family. The - button deletes one. The check mark saves data, the **X** aborts changes, and the half-circle with the arrow on the end refreshes your data. The pyramid-shaped button starts edit mode, though this generally happens automatically when you click into a field and begin typing to make any needed changes.
- Click the Find Family button to locate a family
- Click the Find Individual button to search for a specific individual

Family Data Area

The Family data area, located in the upper third of the Enter/Modify/Delete Names dialog, contains fields that are **common** to *all* members of a family. You need enter this information only once, and it will immediately be applied to all family members.

Individuals Data Area

The Individuals data area, located in the lower two-thirds of the Enter/Modify/Delete Names dialog, contains fields that are **unique** to each person in a family. Each family member's data appears on his or her own tab page. You can view any family member's information simply by clicking on the tab of the person whose data you wish to view.

Getting Help

For general help, click the Help button in the lower right corner of the Individuals data area. The help topic that appears will have links for all the specific functions and fields on this dialog as well as general information about it.

Remember that CMD's help system is also context-sensitive. That means that when the cursor is in, for example, the Family Name field, when you press F1 the specific help topic for the Family Name field will appear.

When is the Data Saved?

Generally, data is **automatically saved** at several points enabling you to simply use the Enter/Modify/Delete Names dialog without worrying about it. Data is saved when you...

- Click the check mark button on the navigation bar. There's a separate check mark in the Family data area and the Individuals data area. If the check mark is disabled or grayed out, then there is nothing to save. You may click it anytime it is enabled to save at any point
- Move from one family to another using the buttons on the navigation bar
- Click the Find Family, Find Individuals, Family Picture, or Add New Family Member button
- Click a different family member's tab page
- Enter Offices, Talents, Activities, User 1, or User 2 fields for an individual
- Enter comments, visitation, attendance, or work/school information

If you attempt to leave the Enter/Modify/Delete Names dialog and something has not yet been saved, you'll be asked if you wish to save it before you leave.

Command Buttons

There are a number of command buttons which appear on the Enter/Modify/Delete Names dialog:

- **Navigation Bar**. See page 26.
- **Close**. The close button is the small box in the upper right corner of the dialog with the X. Click this button when you are through using Enter/Modify/Delete and are ready to leave.
- **Find Family**. Click this button to bring up the Family Name Lookup dialog to locate names by family.
- **Find Individual**. Click this button to bring up the Individual Name Lookup dialog to locate any individual in your data file. When he or she is found, the family information for the person you requested will be displayed in the Family data area, and the tab page of the name you searched for will be selected in the Individuals data area.
- **Family Picture**. Click this button to search for or display or clear a picture for the family currently displayed in the Family data area. See the next chapter for more specific information.
- **Add New Family Member**. Click this button whenever you wish to add a new name to a family or when you need to reassign one from one family to the family currently displayed on the screen.
- **Print Envelope.** The Print Envelope button is located just to the right of the Gets Newsletter field in the upper right corner of the Individuals data area. Click this button if you wish to print an envelope for the currently selected individual. When you click this button, a dialog will appear with several name options, and with access to CMD's envelope definition dialog so that you can set up envelopes for your printer.
- **Reorder Family Members**. The Reorder Family Members button is located just to the right of the Print Envelope button. Click this button when you wish to reorder the individuals as they appear on the tabs in the Individuals data area. This may be necessary to correctly order the way names print in some of the output forms such as Church Directory.

  When this item is selected, a small dialog will appear. You can highlight any family name and move them around to be in the order that you wish. Click the OK button to save the reordered list. The tabs will immediately reflect the new ordering.
- **Print Profiles.** Located just below the Print Envelope button, click this button if you wish to print a profile page of either the currently selected individual or the family.
- **Individual Picture**. Located just below the Reorder Family Members button, click it to search for or display or clear a picture of the individual who's data is currently being displayed. See the next chapter for more specific information.
- **Work/School Information**. Click this button to see a small dialog that you can use to enter any specifics about the currently selected individual's work or school setting or child registry information.
- **Comments/Visitation/Attendance button**. The button used to select one of these functions is located in the lower right corner of the Individuals data area and looks like this:

When you first arrive in Enter/Modify/Delete Names, the button is labeled Comments. That means that if you push the button, the comments dialog for the currently displayed individual will be brought to the screen.

To change the function of this button, you may either...

1 Click the small + in the lower right corner of the button to bring up a list of choices that you can select from (either Comments, Visitation, or Attendance). Once the function has been selected, clicking the button will call up that function. Or,

2 If you have a wheel mouse, move the mouse pointer anywhere in the button and turn the wheel. Each time you move the wheel, the next item in the list will be displayed on the button. Scroll to the one you want and then click the button to call the function.

- **Help**. Click this button for general help topics related to using this dialog. For specific help related to the field in which the cursor is currently located, press F1.

The next two chapters explain in detail how to Enter, Modify, Delete, and Archive families, names, and their associated data.

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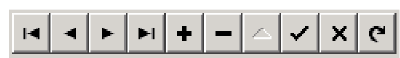
5

Enter & Modify Names

Adding a New Family - a Brief Overview

Most of this chapter is a reference for all the fields and functions available when you enter a family or individual into your data file. Before diving into the specifics, however, a brief overview of the process of adding a new family to the data file will be helpful. Once you understand the flow of entering a family along with one or more family members, the reference material that will follow will be more easily understood.

Where to Start



To **add** a new family, **click the + button** on the navigation bar in the upper right corner of the Family data area (shown on page 34). This will clear both the Family data area and the Individuals data area (see page 37), and the cursor will be placed in the Family Name field in the upper left corner of the Family data area. Enter the name of the family as it should appear in an ordered list. Enter the last name first followed by family members like this:

Smith, John, Joan, Tim, & Tina

Enter as many family members' names in this field as needed to help you easily identify the family.

Important!

<u>Do not just enter a last name only</u>. Enter a last name followed by a comma, and at least the first names of the husband/wife or the first name of a single parent or adult.

Failure to follow our advice on this will invariably cause some of your names to be left out when print family-based lists such as a church directory or rotary cards. Save yourself some frustration and a support call! Enter more than just the last name so that the CMD will see each family as unique.

Once you are finished entering the Family Name, press TAB to move to the first line of the Residence Address.

The Residence Address is part of the "address notebook" which contains several addresses. **If a family's residence and mailing address are the same, enter it in the Residence address only**. If the family uses a different address to receive their mail, click the Mail tab, and enter the mailing address in the fields provided there. Enter the rest of the information for the family as needed in the other fields provided in the Family data area (the specifics for the other fields start on page 34).

Once all the family data has been entered, and you are ready to enter some individual family members, **click the Add New Family Member button** in the lower right corner of the Family data area.

When you click Add New Family Member, a pop-up list displays several different options to describe the type of person you are about to enter. Select the type of family member you are entering from this list. Once you've made a choice from the pop-up list, a tab will be created for the new family member in the Individuals data area, and the cursor will be automatically placed in the Title field. **At this point you may enter the information for the new family member.**

Important!

You should *always* enter at least one individual whenever you enter a new family. Even if there's only one person in the family, *always* enter an individual.

Many of the selections and sorts used in printing require one or more of the fields from the Individuals data area.

Name Entry Order

Families may be entered into CMD in *any order* you wish. CMD will take care of ordering them correctly for printing or for finding them later when their information needs to be viewed or updated. You may add individuals to a family at any time, and you may remove them at any time as well.

When you add individuals to a family, **however, we do recommend a specific order**. Enter adults or parents first. If you are entering a traditional family, enter husband, wife, and then their dependents in age order. If you are entering a single parent, enter the parent first followed by dependents in age order. This entry order enables CMD to print your families' names in logical order when printing families in the church directory.

While entering family members, you can click the **Add New Family Member** button as often as needed to enter as many family members as belong in a family.

Entering Adults

There are a few simple general guidelines for entering adults that *must* be followed or you'll end up with problems later on when you attempt to print labels, a church directory, or other reports because CMD won't know how to properly format or group the names. To save yourself some aggravation and a support call, enter adults as follows:

- If you enter a husband, you ***must*** also enter a wife (or vice versa). It's fine if you do not wish to enter non-member spouses in your CMD data file. However, CMD will always look for a corresponding spouse if you enter either a husband or wife. If none is found, it can cause garbage to be printed instead of a name when printing lists, labels, or reports.

  If you don't wish to enter a non-member spouse, then define the one you *do* enter into CMD as a Single Adult or Single Parent for CMD's purposes. You can always note in one of the comments fields that the individual has a non-attending, non-member spouse.
- Do *not* place more than one Single Adult and/or Single Parent in the same family. **You can have <u>only one</u> Single Adult or Single Parent in a family unit**.
- You *cannot* have a husband, wife, *and* a Single Adult or Single Parent in one family. One common situation in which you might be tempted to do this is when a young adult has reached legal age or has graduated from high school. It would seem logical to change their Family Status field to Single Adult and keep them in the family unit.

  However, changing a young adult's Family Status to Single Adult where there is already a husband, wife, or other Single Adult or Single Parent will cause problems. In such a case, it's best to create a separate family for the young adult and reassign their individual name information to their own family unit. A special feature that handles this situation in one easy step is described on page 45 .
- You *may* use two Partners in a family unit if needed.

Adding New Names to a Family Later On

To add a new name to an already established family, click the Find Family button, locate the family to which you wish to enter a new individual, and then click Call Name. That will bring the family to the Family data area. The current members of the family will be visible in the Individuals data area. Click the Add New Family Member button and add the new family member as needed.

Reassign a Name to Another Family

At some point in using CMD, you will likely find yourself needing to move a name that is in one family to another. One such situation is when two single people in your congregation get married. In such a case, follow these steps:

- Call up the husband's family record using the Find Family function.
- Once his name is in the Family data area, click Add New Family Member and select **Reassign a Name**. Search for his new wife, highlight her, and then click the **Reassign** button. This will move her individual data information from whatever family she *was* in to the household record of her new husband. Adjust the Title, Marital & Family Status fields as needed.
- In such a case, you will need to delete the left-over family record if the woman was the only member of her former family.

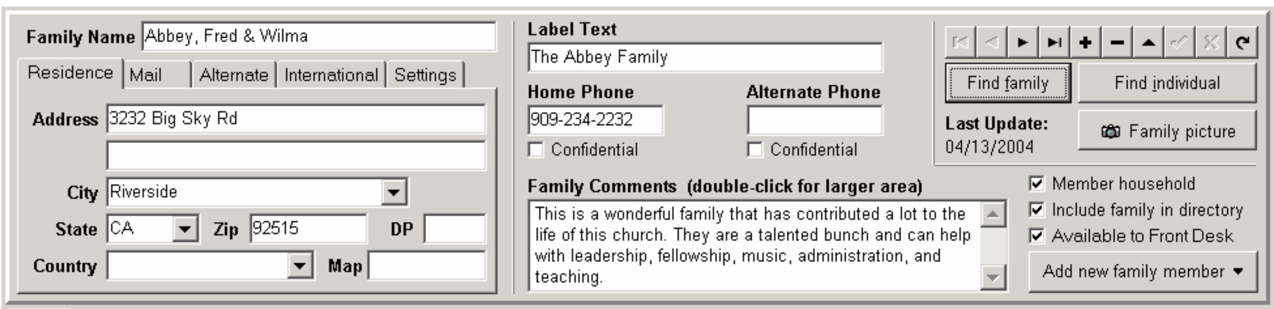
Another common situation in which a name might be reassigned is when a minor child reaches 18 or graduates from high school. See page 45 for a special shortcut available to create a new family and reassign a young adult to it in one convenient step.

Field Descriptions

The following section is a reference for the various fields available on the Enter/Modify/Delete dialog. They will be detailed in the order in which they are normally encountered during the process of entering families and individuals as you tab through the fields.

Family Data Area

The Family data area (illustrated below) occupies the upper third of the Enter/Modify/Delete Names dialog, and contains the data fields that are common to all members of the family. **Information in the Family Data area need only be entered once to apply to all members of the family**.



A family (for purposes of CMD) should be considered those who live together at one address who are related to each other. It may be advisable in some cases to make a separate family record for adult children who are still living at home.

Family Name: Enter up to 40 characters for the family name. Enter the name as you would like for it to appear in an alphabetized list. Include any family members that will help you easily identify the family when your list gets larger. See page 31 for more info. Press TAB to move to the next field.

Address Notebook: The Address Notebook contains fields for 4 different addresses as well as some important settings for addresses:

- **Residence Address**: The Residence Address is the first address you see on the address notebook. If the family you are entering uses the same address for their mail, only enter data in the Residence Address page.
- **Mail Address**: Only use this page if the family you are entering uses a mailing address that is different than their residence address. Click the Mail tab to access these fields.
- **Alternate Address**: Use this address for families that change addresses seasonally.
- **International Address**: Use this page if the address is other than a US/Canadian address that cannot be formatted using the fields provided.
- **Settings**: The first setting on the Settings page allows you to specify which address is used in a church directory. The default setting is Residence address. The second setting allows you to specify the country of the address. Though not used currently by CMD, this field will allow future formatting of addresses into locally accepted formats based on country.

- **Address Fields**: On all the address pages, there are two lines of 40 characters each for the street address. If you need to use the second line, **make sure that the actual delivery address for the family is placed in the second line**.

  You may enter up to 20 characters in the City & Country fields, 4 in the State field, 10 in the Zip field, 4 in the DPBC (Delivery Point Bar Code) field, and 10 in the Map Coordinate field.

  Press TAB to move from one field to the next on any of the Address Notebook pages.

- **History List fields**. The City, State, and Country fields on Residence, Mail, and Alternate pages are history list fields. These fields keep track of past entries and allow shortcut entries of subsequent entries. Page 21 has more information on this keystroke saving feature.

Label Text: This field serves two purposes. First, it is useful for instances where a husband and wife's name does not format correctly in CMD when labels or envelopes are printed. In such cases, you can enter text as it should appear on labels and envelopes directly in this field. Enter up to 40 characters.

You may also use this field if you wish to enter Organizations in this section of the program (instead of in the separate Organizations database provided in CMD). This might be useful if you often include certain organizations in your regular mailings.

Home Phone: Enter the family's home phone number here, including area code. Note that if you have entered a default area code in the General Preferences dialog available on the Preferences Menu, it will be entered automatically when you enter the field. If you need to leave the phone number blank, tab on to the next field and the area code will be erased.

Home Phone Confidential: Check this box if you don't want this family's phone number to appear in Church Directory output forms.

Alternate Phone/Confidential: These fields are for use when an Alternate Address is stored for the family currently selected.

Family Comments: Double-click anywhere within the family comments field to open up a larger dialog which allows you to enter or view comments for this family. You may enter up to 64K worth of comments for each family in your file.

Member Household: Check this box if at least one member of the family is an actual member of your church. This will enable you to easily print a list of member families.

Include Family in Directory: Check this box if the family should be included in the published church family directory. If this box is not checked, no individuals from the family will be included in the church directory *even* if they are marked to be included in the Individuals data area. This box must be checked for *any* member of the family to be included.

Available To Front Desk. Check this box if you wish to make this family available to the Front Desk program. If you uncheck it, it will not be available for viewing or updating in Front Desk.

Family Picture: Click this button to search for, to display, or to clear a picture for the family currently displayed in the Family data area.

When this button is clicked, the **Picture Display** dialog appears. If a picture has already been saved for this family, it will be displayed. If the Picture Display dialog is blank, click the **Find Picture** button to locate a picture. Click on the picture to be linked with the family, click Open, and then click the **Save Picture** button when back at the Picture Display dialog.

Important!

Be sure to read the information on page 23-24 for specifics on the size, resolution, and format of pictures that you embed in the CMD database. Failure to follow our specs for pictures will result in error messages and frustration on your part!

Add New Family Member button: Click this button when you need to add new members to a family. When clicked, a list will be display the different types of family members. These choices mirror those of the Family Status field (see page 41). Select the type of family member you are adding by clicking on the choice that most describes the individual. Your options are:

- **Husband, Wife**. Remember, that if you enter either one of these, **make sure you enter the other one also**!
- **Single Adult**. Use this choice if there is no one else in the family and the individual is an adult. <u>Only one per family please</u>!
- **Single Parent**. Use this choice only if the individual is an adult and there are dependents who will also be entered. <u>Only one per family please</u>!
- **Minor Child**. Use this choice for underage dependents. Do not use Minor Child if he/she is the only individual in a family. If that’s the case, use Independent Minor described below.
- **Adult Child**. Use this only if you wish to keep an adult child in their original family unit.
- **Other Dependent**. This choice might be appropriate for, say, a foster child, etc.
- **Independent Minor**. Use this choice *only* if there is no adult-level name in a family unit. For example, you may wish to track VBS attendees in your CMD database. In such cases, you’ll only have the name of a child to enter and not the parent(s). Or perhaps an underage child has joined your church but his/her parents have not. Independent Minor allows CMD to properly construct the name for family-based lists and reports.
- **Partner**. You may define up to two Partners in a family unit.
- **Organization**. If you wish to track Organizations in the main CMD data file, you should label it as such with this choice. Don’t forget that CMD has a built-in Organizations database available on the Tools Menu
- **Reassign a Name**. Use this selection when you need to reassign a name from one family to another. **Use it *only* when the family to which a name is to be reassigned is up on the screen**. When this option is selected, a Find Individual dialog will appear. Find the individual who is to be reassigned, highlight him/her, and then click the Reassign button.

Saving Data

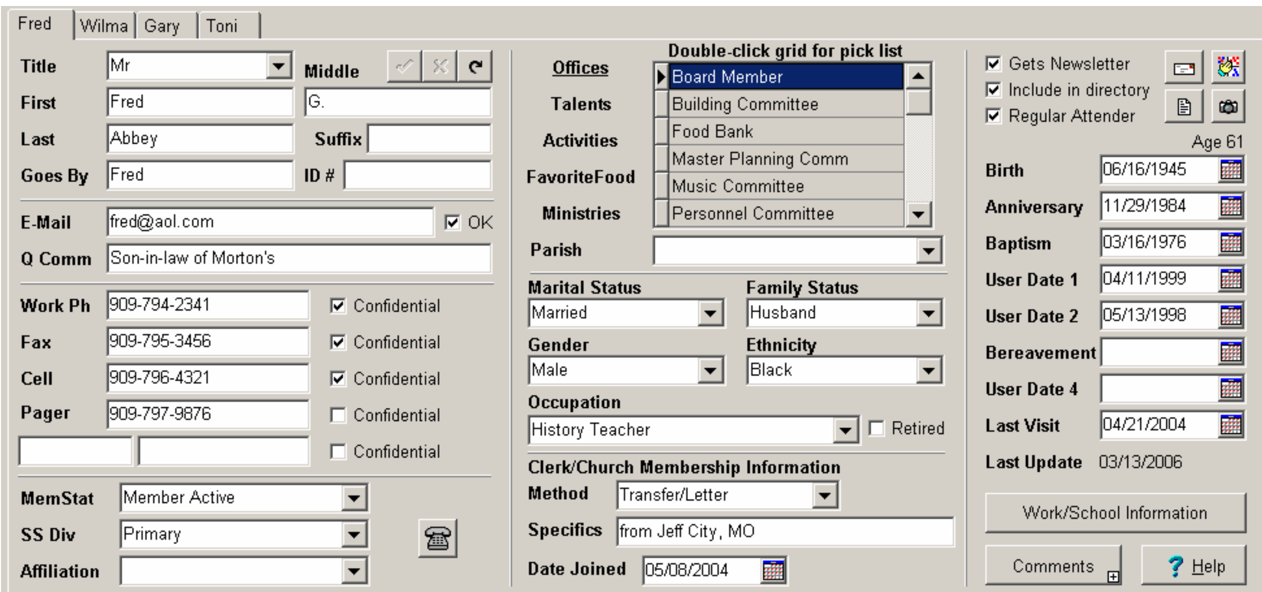
To save the family information you are entering or updating, you can click the check mark when it is enabled in the navigation bar in the upper right corner of the Family Data area.

However, the data is also *automatically saved* when you scroll to another family, click the Find Family, Find Individual, or Show Picture button. It will also be automatically saved when you add a new family member.

Individuals Data Area

The Individuals Data area holds all the data that is specific to each person in the family. When new family members are added, each member's data is recorded and displayed on their own tab page. You can move from one family member to another just by clicking the tab page of the family member whose data you wish to view or modify. The Individuals data area looks like this:

Specifics for each field in the Individuals data area will also be presented in the same order you'll encounter them.



Title: You may either type up to 10 characters for the Title you wish to use, leave it blank, or select it from the drop-down list of choices defined for your Titles Menu. To modify or define the list of titles while you are entering a name, double-click directly in the Title field to bring up the Titles Preferences page. You can also change the list of titles by selecting the Menus Items option on the Preferences Menu. If you select the title from the drop down list, highlight it then press Enter or click on it with your mouse pointer. Press TAB to move to the First Name field.

First Name: Enter up to 20 characters for the First Name. Use the formal name here if it is different than the name a person generally goes by. Finish with TAB.

Middle Name: Enter up to 20 characters for the Middle Name. You may also simply enter a middle initial, or leave it blank. Finish with TAB.

Tip!

If you entered the family's name properly in the Family Name field something like this:

Smith, John & Mary

...then after you press TAB to finish the First Name entry, CMD will derive the Last Name from the Family Name field and enter it automatically in the individual's Last Name field for you. CMD will also place the First Name you just entered in the Goes By field in case the Goes By and First Name fields are going to be the same. If they are different, you may change Goes By when you tab into it in the normal flow of entering the name.

Last Name: Enter up to 20 characters for the Last Name. Finish with TAB.

Suffix: Enter up to 6 characters. Examples: Jr., Esq., PhD., etc. Finish with TAB.

Goes By: Enter up to 20 characters. This is the name by which a person is generally known. Since in most cases this will be the same information as the First Name, when you first arrive in Goes By the information in the First Name field will be placed there automatically for you. If this information is not correct, simply type in the correct information for this field. Finish with TAB.

Do not leave Goes By blank! If the person you are entering goes by their first name, make sure their first name is entered in this field also. This is important because Goes By is often used in CMD.

ID Num: Enter up to 15 characters for an ID Number. Finish with TAB.

E-Mail: Enter up to 40 characters for the e-mail address. When the cursor is in this field, you may press Ctrl-C to copy the e-mail address directly to the clipboard. You can then press Ctrl-V in your e-mail program's address field when you need to send an e-mail. Finish with TAB.

E-Mail OK: Check this box only if a name has an e-mail address *and* if you wish for CMD to include his/her name as the addressee in a group e-mail instead of printing labels. The actual determination to use e-mail for those who have e-mail addressees and print labels for those who do not is made on the Print Control page of the Print Names dialog. However, a person's e-mail will not be used unless the E-Mail OK field is checked here. Finish with TAB.

Quick Comments: Enter up to 40 characters. Use this field to provide a quick visual note for things such as extended family relationships, maiden name, job information, or any other item which would be useful to note when you view a name on the screen. Finish with TAB.

Work, Fax, Cell, Pager, and Other Phone: There is a 20 character limit for each of these phone fields to allow for an extension. The default area code will also be placed in the field for you if you have defined one in the General Preferences. Finish each phone field with TAB. You may type over the word "Other" in the Other Phone field to make it show what the number is used for. What you enter to replace the word Other may be done differently for each name in your file.

Confidential: This field allows you to determine whether or not phone numbers will be included in a church directory. Some families may be sensitive about having this information published. If the Confidential check box is checked, the phone number will not be printed. To check or uncheck the box, click on it with your mouse, or press the Space Bar while the Confidential field has focus. Press TAB if the default presented for you is acceptable. **This will not affect any of the other lists generated by Print Names, which are primarily for office use**.

Menu Field Behaviors

Before you hear the details about the menu fields that come up next in the normal sequence of entering a person's information, you need to become acquainted with a behavior that is programmed into these menu fields: Membership Status, SS Div, Affiliation, Marital Status, Gender, and Ethnicity.

When you are adding names using the normal sequence of entering data and pressing TAB to get to the Membership Status combo box, for example, the list of choices will automatically be "opened" or dropped-down when you first tab into it.

However, if you move directly to a field like the Membership Status field by clicking on it with your mouse, the combo box's behavior might be a bit different. **It might open up the list of choices and then immediately close again**. If this happens, just click the arrow icon on the right edge of the combo box and it will open normally. If you need to click directly into one of these menu fields when first entering a name, click in the white part of the box, *not* the icon, and the list will stay open for you.

This behavior happens when the default choice has already been entered or when the field is blank. If a different choice other than the default has already been made, the box will not open automatically.

To make a selection once the list is open, either use the cursor keys or the scroll bar control to scroll through the list to find your choice. When you've found it, highlight it by moving the highlight bar with the cursor keys and press ENTER, or by clicking on it. Then press TAB to move to the next field.

Menu Field Specifics

Membership Status: This important field tells you at the most basic level why a name is in your da-

Tip!

When any of these menu fields has focus, you can double-click directly in the white part of the edit box and the Preferences dialog that allows you to edit the menu choices appears so that you can alter the list of choices for the menu.

Any changes saved here will be immediately available when you exit the Preferences dialog. Remember that with almost all of CMD's menu fields, you can define your own list of up to 300 choices for each one.

tabase. Only one choice per name can be made from this menu, so each choice on the menu should be mutually exclusive. The default choices for this menu will illustrate this. Generally you'll use this field to differentiate between different types of members and non-members.

SS Class/Division: S.S. Class/Division may be selected in the same manner as described for selecting Membership Status above. Scroll until you find your choice, highlight it, and then press TAB.

Affiliation: If you are in a **multi-church setting**, you should use this field to differentiate between members in the various churches in your district.

If you are not in a multi-church setting, you could use this field to track members who generally attend different worship services.

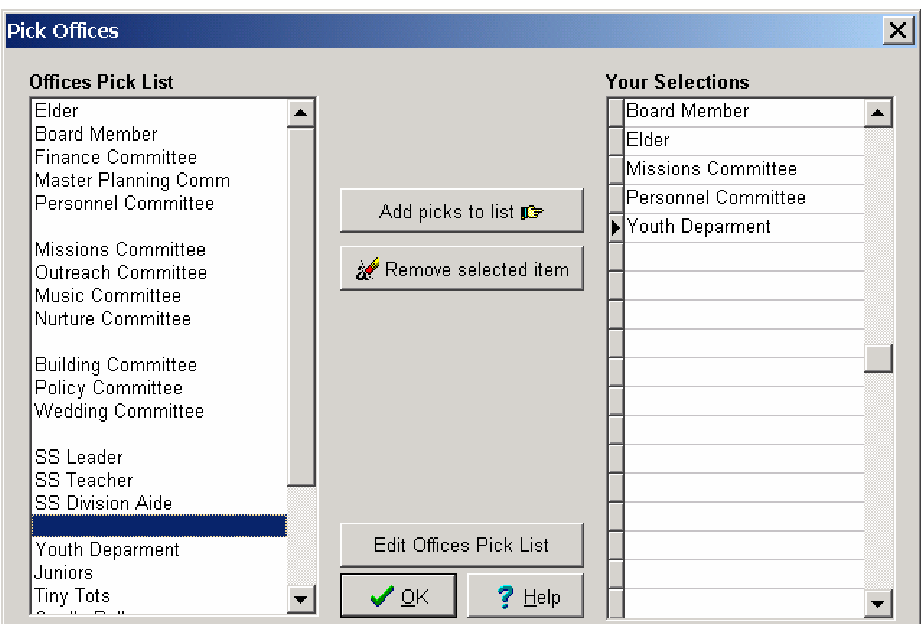
Multi-Choice Menus

Offices, Talents, Activities, User1, User 2: Since these five menus function in a similar manner, we'll explain them as a group. The process for viewing and selecting items for these menus applies to all of these fields. These fields differ from other menu fields in CMD in that you can store *as many of the available choices on each of these menus as you desire* in any name's data record!

When first entering a name's data, the **Offices** label will be underlined, meaning that Offices is the field that you can view or edit. Since all the above menu fields operate the same way, we'll use the Offices field as our example.

When first entering a name, the single-column grid to the right of the fields will be blank. Double-click directly in the grid while Offices is underlined to bring up this dialog which you can use to mark the name with any number of the church offices on your list:

When you arrive at this dialog, you'll notice a list of possible choices in the left column, and a list of the currently selected items in the right column. To add a new item to the list, click on it in the left



column and then click the **Add Picks to List** button to move them to the right column. You can hold CTRL while you click to select multiple items and move them all with one click if you wish. To remove a choice, click on it in the *right* column and click the **Remove Selected Item** button.

If you need to edit the list of possible choices, click the **Edit Pick List** button. Any changes that are made there will be immediately reflected on this dialog.

When you are finished adding or removing choices in the Your Selections column above, click OK and you'll be returned to the Enter/Modify/Delete Names dialog. You'll notice the choices you just made reflected in the grid to the right of the field names.

To add to or remove items from Talents, Activities, User 1, or User 2, **click directly on the label for the field you want to edit**. When it's underlined, any current choices for the underlined menu will be displayed in the grid, and will appear for selection when you double-click the grid.

User 3: User 1, User 2, User 3, and User 4 are all designed to be defined according to your specific needs. User 1 and User 2 are menu fields similar to Offices or Talents. User 3 is a 30-character text field more like Quick Comments. User 4 by default tracks Ethnicity. Note that you can change the name for any of the user fields use by selecting the **User Field Names item on the General Preferences dialog.**

Marital Status: Make a selection from the menu provided. Move the highlight bar to your choice with the cursor keys and press ENTER, or click on it with the mouse pointer. Press TAB to move to the next field. The choices for this menu may be changed by selecting **Menu Items (pick lists)** on the Preferences Menu.

Family Status: Each name should have a family status choice that reflects his or her role in the family. Select the appropriate choice from the menu by highlighting your choice with the cursor keys or by a mouse click followed by ENTER. Press TAB to move to the next field. This field is *not* user-definable.

Gender: As with the other drop-down menu choices, select an option with the mouse pointer or by using the cursor keys. Finish with TAB. This field is *not* user-definable.

User 4/Ethnicity: By default, this field is designated to track Ethnicity. However, if you do not wish to track ethnicity, you may rename this menu field and change the menus items to suit your needs by selecting the **Menu Items (pick lists) on the Preferences Menu, and the User Field Names page on the General Preferences dialog**.

Regardless of your use, as with the other drop-down menus choices, select an option with the mouse pointer or by using the cursor keys. Finish with TAB.

Occupation: You may enter any description here you wish. Be consistent! The computer will be searching for exact matches when you call for a list. Occupation is a history list field (see page 21 for more information).

Retired: Check this box if the person is retired.

Clerk/Church Membership Information

There are three fields used by the clerk functions to track how and when a person joined your church:

Joining Method: Select an item from this list that denotes how a member joined. This list may be edited with the **Menu Items (pick lists) on the Preferences Menu.** The items you define for this list will appear on your clerk reports.

Joining Specifics:Enter specific information about the method. For example, if someone joined by baptism, enter something like this:

by Pastor David Johnson

If someone transferred from another church, enter something like this:

from First Church in Modesto, CA

When the clerk report is printed, the information in the Joining Method field will be combined with the information in the Joining Specifics field.

Date Joined: Enter the date the person actually joined your church. Either type it in manually, or click the calendar icon on the right edge of the edit box to pick the date from a pop-up calendar.

Gets Newsletter: This marks the name in a given household to which newsletters will be addressed. **Generally only *one* person in a household should be selected to receive it.** To mark a name to get the newsletter, make sure the check box is checked. To make a change in the check box, click on it with your mouse pointer, or press the Space Bar when the check box has "focus." Press TAB to move to the next field.

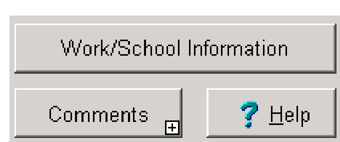
Include in Church Directory: This field determines whether or not this name will be included in a church directory. **Note that a name will only be included if the Include Family in Directory field is also marked in the Family data area**.

Regular Attender: Check this item if the name is a regular attender at your church. This will be useful for some lists, and for filtering names when entering attendance.

Dates: CMD provides six predefined dates, and 4 user-definable dates. Each of them is entered in the same manner: either type the date manually in the edit box provided, or click the calendar icon on the ridge edge of the edit box to pick the date from a pop-up calendar. **Partial dates are not allowed**. For more information on how to use the pop-up calendar, see page 21. You can change the names of the User Dates by selecting the **User Field Names page on the General Preferences dialog**.

Work/School Information: Click this button to see a small text entry dialog where you can enter in free form information about a name's work. If the name is a minor child, you access the Child Registry feature. See page 44 for details.

Comments/Visitation/Attendance. These three functions are selected by means of a special button located just under the **Work/School information** button. When you first come in to Enter/Modify/Delete Names, it looks like the figure to the right.



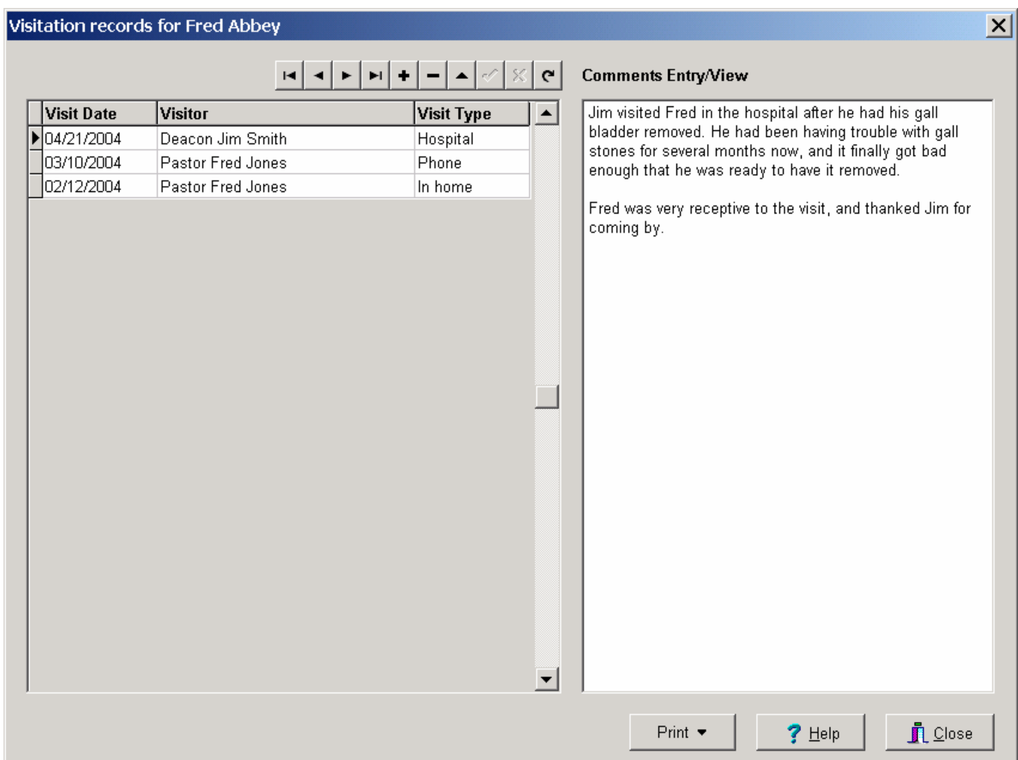
When this button says Comments, clicking it will bring up the comments screen for the individual whose tab is selected in the Individuals data area.

To access the Visitation dialog for this name, either click the small + on the lower right corner of the Comments button, or move your mouse pointer to this button and move the wheel on your mouse.

If you move the mouse wheel, the button will change to either Visitation or Attendance. If you click the small + in the lower right corner, a pop-up menu will appear from which you may select which function you want the button to indicate. The appropriate dialog for the indicated function will appear when you click the button.

Comments: When the button says Comments, a dialog with a large area into which comments about this name may be entered will appear. You may enter up to 64K worth of comments for each name in your file. An asterisk (*) appears beside the word Comments when comments are stored for a name.

Visitation: Click the Visitation button to track virtually any number of visits received by a person.

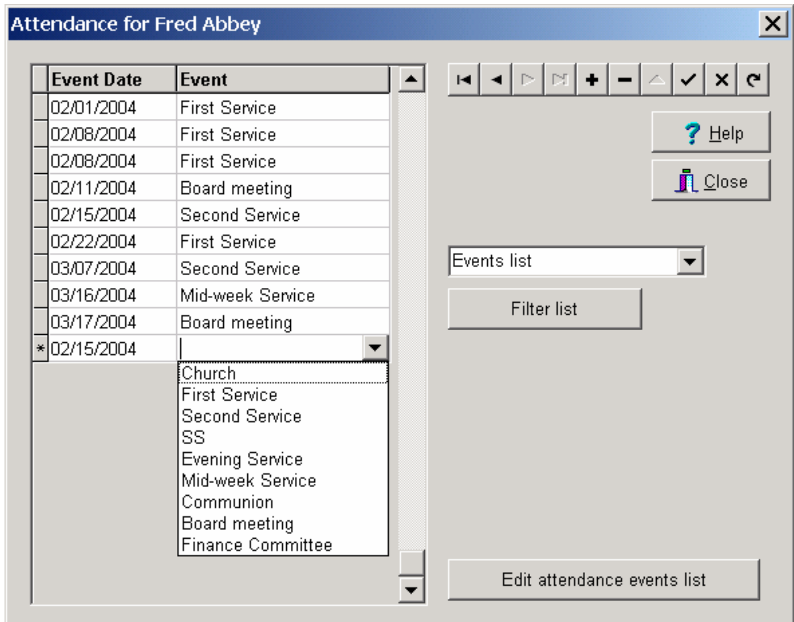


To add a record of a visit, click the + button on the Visitation dialog’s navigation bar. A new line with the visitation fields will appear:

- Click the calendar icon to select the date of the visit. Press Tab.
- Type in the name of the person who made the visit. Press Tab.
- Select from the drop-down list the type of visit that was made. Press TAB.
- Type in any comments that are relevant to the visit. The comments for the currently selected visited will be displayed in the larger comments area on the bottom of the dialog.

The visits are listed in date order, with the most recent visit appearing first. Also, the date of the most recent visit recorded here will be automatically transferred to the Last Visit date on the Enter/Modify/ Delete Names dialog.

Attendance: Click the Attendance button if you wish to view, add to, or remove attendance items from the attendance record of the name.

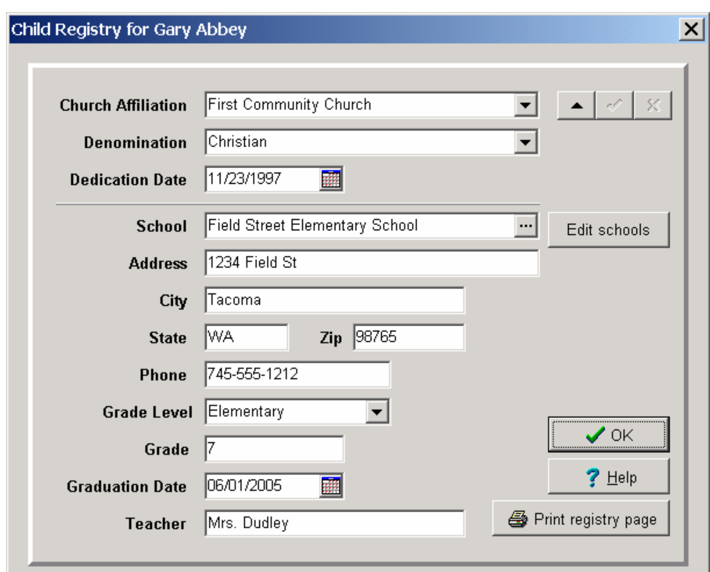


Click the + on the navigation bar to add an attendance event. When one is added, click the calendar icon to select a date from a pop-up calendar. Press Tab.

Select an attendance event from the drop-down menu. Press the check mark button to save, or click + to save and enter another event. Click Edit Attendance Events List if you need to add a new event to the list.

If you wish to limit the view of attendance events to a certain type, select the type you wish to view just above the Filter List button. Once you've selected the item, click Filter List. Only those attendance events that match the filter will be displayed.

Generally it will be more efficient to use the attendance entry tools on the Attendance Menu, but if all you need to do is view or touch up the attendance for a name or two, this dialog will work just fine.



Child Registry

Whenever the currently selected name in the Individuals data area is a **minor child**, a special feature called the **Child Registry** is available. It is accessed when you click the Work/School button.

The Child Registry dialog allows you to enter a few additional fields that are useful to record about children, especially as they become involved in church activities such as day camp, VBS, or even those who regularly attend one of your SS divisions. To set the graduation date, first select the Grade Level, then enter either their current grade *or* enter June 1 of their expected graduation year.

You can print the Child Registry page right from this dialog, or it can be printed as an output form choice in Print Names. The printed form includes these fields plus additional fields such as parental contact information, activities, important dates, and even a picture of the child. This is a great form to provide any ministry leader who will have oversight of children so that they can memorize their names and know how to contact parents in case of an emergency.

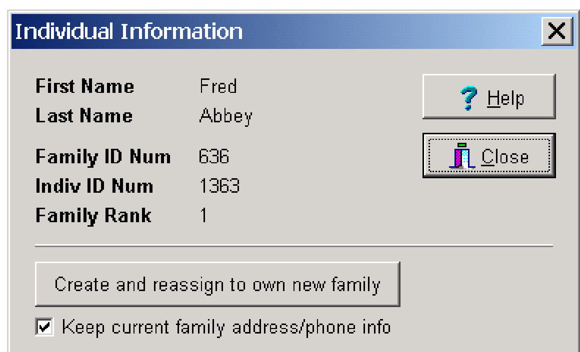
Modify Names

You can modify any item of information about any name or family at any time you need to using the very same dialog and fields that were used during entry.

Call up any family or individual name that needs updating using either navigation bar buttons, the Find Family or the Find Individual buttons.

When you have located the family or name you wish to update, click directly into any field that needs updating, make the needed changes, and then click the check mark button on the navigation bar in the Family data area or the Individuals data area as appropriate.

Individual Information & Reassign Shortcut



To see **Individual Information** or to access a **special shortcut for reassigning a name**, first click on the tab of the name for which to view individual information or to reassign. Once it's been selected, then *right click* on the name's tab, and the dialog that is shown to the right will appear.

This dialog shows basic record number information in both the individuals data file and family data file, and their ranking within the family unit (the ranking merely refers to the order names appear on the tabs showing each family member). This information may be useful for debugging problems with your data file.

Below this information, a button and a check box enables this dialog to perform a special shortcut **only in specific cases where the selected member of a family needs to be moved to a whole new family not already in CMD**. *If you need to reassign a name to a family that is already established in CMD, use the Reassign a Name function on the Add New Family Member button instead*. See page 33.

Clicking the **Create And Reassign To Own New Family** button will cause CMD to create a new family record for the individual listed on the Individual Information dialog and automatically reassign this person to it all in one step. The check box determines whether or not the new family record will keep the current family address and phone info. If it is unchecked, then you'll need to enter that information manually when the new family record is created. Don’t forget to update the Family Status or other information to reflect the situation of the newly reassigned person.

In some cases, it may mean changing a Minor Child to a Single Adult, or a Single Adult to a Husband or Wife. Whatever the case, adjust Family Status, and perhaps Marital Status as needed to accurately define the individual who has been moved.

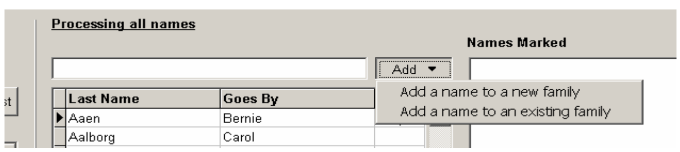
Quick Name Entry

Quick Name Entry is a convenient, alternative method for entering names and basic information when you are working in a CMD feature or function *other* than Enter/Modify/Delete Names. This means you can enter a new name into your CMD file "on the fly" *without having to leave* the function or feature in which you are currently working.

For example, if you discover a new name you want to mark present for an attendance event but the person isn't yet in your CMD data file, you *don't* have to leave the Enter Attendance dialog, go back to the Enter/Modify/Delete Names dialog, enter the name into CMD's data file there, then finally return to Enter Attendance to continue marking your attendance list.

Instead, 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 to access the Quick Name Entry dialog.

When you click the Add button, 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.



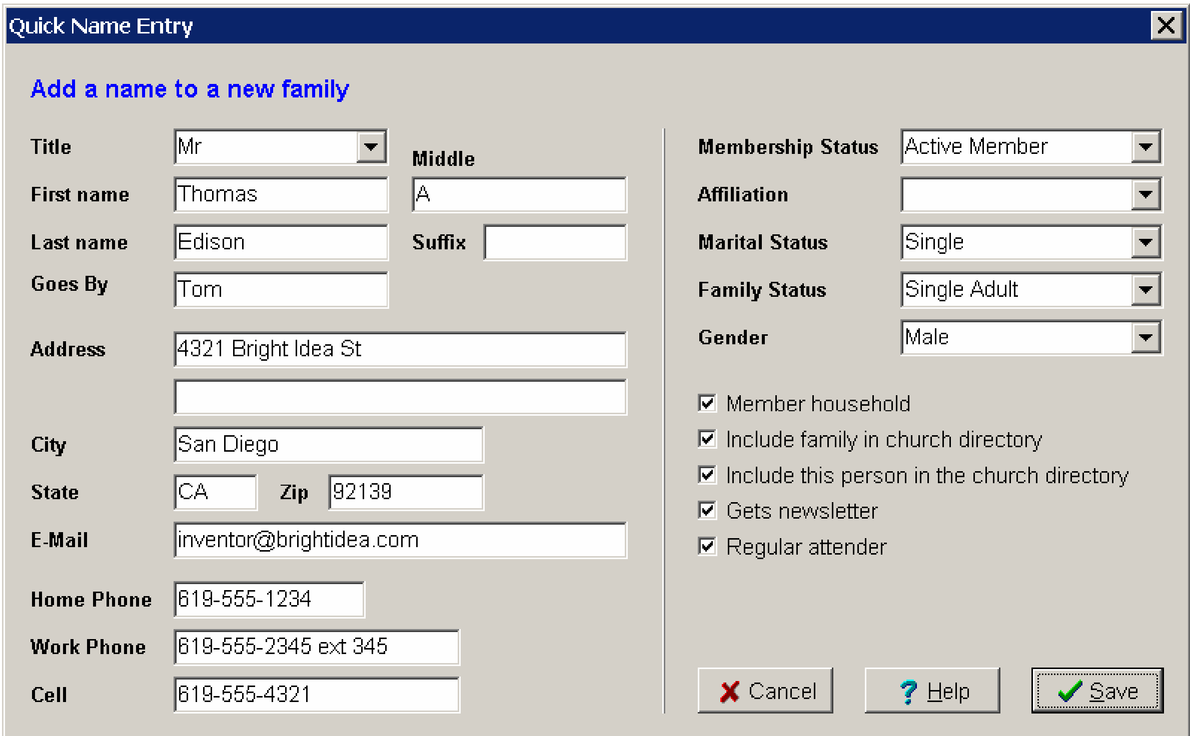
If you elect to add a name to an existing family, a **Family Name Search** dialog appears so that you can select the family to which the new name is to be added. After you have selected the family to which the name will be added, the Quick Name Entry dialog will appear.

When you get to the Quick Name Entry dialog (see 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** to add the name to your CMD data file. The new name just added will become immediately available to you in whatever function you were working in when you called up Quick Name Entry right after you've exited from it.

Accessing Quick Name Entry

You 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 any name search 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. Any changes made to the address fields will *not* be saved in the family record. You'll have to use Enter/Modify/Delete Names to modify a current family's address information.

6
Delete & Archive Names

CMD provides two functions for removing names from your database. Both functions are accessed on the **Delete/Archive** dialog, available when you **click the — (minus) button** on the navigation bar in the Family data area of the Enter/Modify/Delete Names dialog. As the dialog's name implies, the two functions are **delete** and **archive**. Both are accomplished on the same dialog, and can be done either separately or in the same operation.

Why is there both Delete and Archive?

When you delete a family or family member, the name or names you marked for deletion are physically removed from the database. In contrast, the archive file provides a way for CMD to remember names who were once stored in your database in case you wish to track them for historical purposes.

In general, the archive file is designed to store basic information about past church members who left your church - generally because they died, moved away, or renounced their faith.

If you have a district or denominational entity that requires periodic reports on your membership rolls, the archive file should be reserved *only* for persons who were actual members of your congregation. If you do *not* need to make such reports, you can send any name to the archive file, regardless of their membership connection to your church.

Because not all names who should be archived need to be deleted and because not all names who are to be deleted need to be archived, CMD provides a separate facilities for both operations. For example:

- If a family moves their membership to a church out of your local area but wants to remain on your church's newsletter list for awhile, archiving them *only* will allow their membership transfer to be properly recorded for a clerk's report, but will enable them to stay on the mailing list.
- A family whose members were never members of your church but who came as interests for awhile but then ceased coming, only needs to be deleted.
- If a church member dies, you should both archive and delete them.

  The only exception to this is for persons who die during the year but who have given donations that you've been recording in CMD's Contributions Manager. See the Chapter 24, Contributions Manager for hints on how best to handle this situation.

The Delete/Archive Dialog

To access either delete or archive, first bring up the family to be deleted or archived using the Find Family or Find Individual functions on Enter/Modify/Delete Names. When the correct family appears in the Family data area, **click the - (minus) button** on the navigation bar in the upper right corner of the Family data area to see the Delete/Archive dialog:

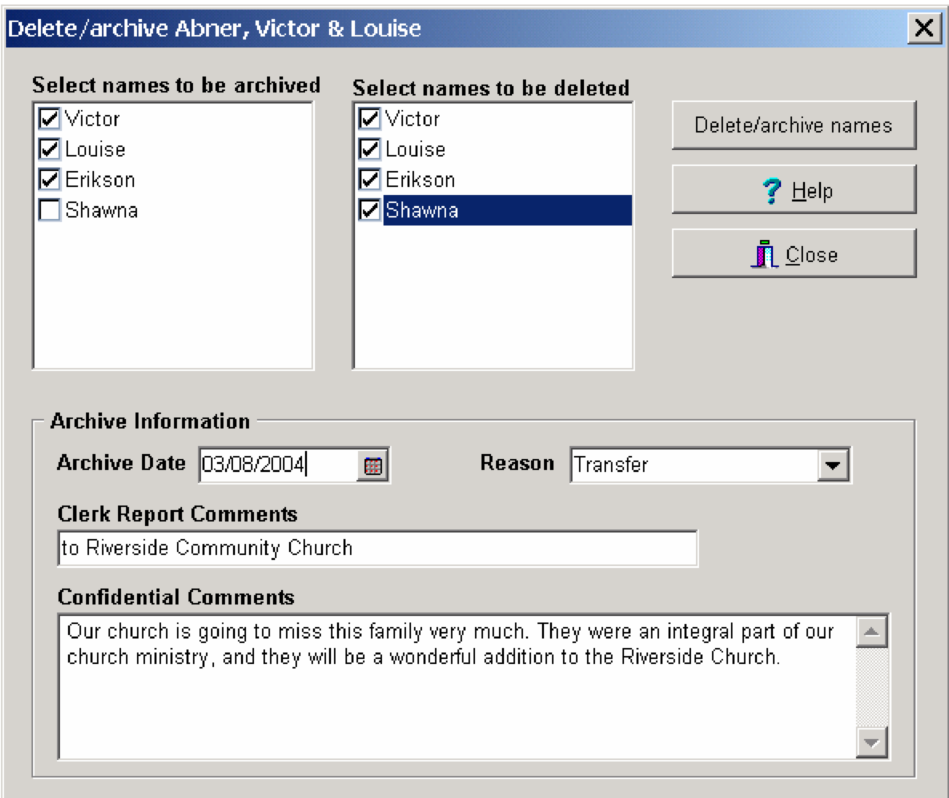


Figure 6.1. The Delete/Archive dialog above shows the dialog in action. Because there are selections made in both columns, members of this family will be deleted and archived in the same action.

Note that the Delete/Archive dialog contains two columns listing the names in the family along with some fields in the lower half of the dialog. One column determines if names are going to be sent to the archive file, the other if they are to be deleted. We'll reference the information in the above screen grab as each function is explained.

Archiving Names

The left-hand column lists names to be archived. By default, CMD will check all the names in the family who are listed as church members. Names who are not members are left unchecked. In our example above, three people in the family were members, but Shawna was not, so her name is not automatically checked. If you wish to send a non-church-member family member to the archive file, manually check the name by clicking in the box to the left of the name. Similarly, if you wish to uncheck a name, click on the box of the family member you wish to uncheck.

Remember, archive is designed to store information only about members who have left your membership. If you need to report membership changes to a district or denominational entity, storing nonmember names in the archive file will render reports of members who have left invalid since nonmember names would be mixed in.

Archiving also requires that you fill in at least two of the fields in the lower half of the dialog: the date and the reason. In our example on page 50, you will notice that we have entered a date and a reason for archiving their names. In the case of the Abner family, they had moved to a different city and selected a church their to which to belong. The date represented the date that their request was granted (by whatever local process you use in your church), and the Reason combo indicates that they are transferring their membership.

The Clerk Report Comments field holds the specifics. In this case, they are moving their church membership to the Riverside Community Church. This information will be printed as a part of the clerk reports that show information about past members. The information in the Confidential Comments field, however, will not be printed in clerk reports. It is for the private, internal use of the church office.

Everyone Has Their Reasons...

The list of reasons that is displayed when you open the Reason combo box may be changed to fit the needs of your tradition. You may double-click within the edit area of the Reason field to edit the list of choices, or you may access the list as one of the menus on the Edit Menus item on the Preferences Menu.

Deleting Names

The right hand column is a listing of names who should be deleted from your file. You will need to manually check each name who should be permanently removed. **Note that if all names are deleted from a family, the family information will also be deleted.**

Please note that names or families who are deleted cannot be undeleted. You will have to re-enter any families or individuals who have been deleted here.

Delete/Archive Button

Once you have checked all the names in either the archive or delete column that you wish, click the Delete/Archive button and CMD will process your request. Some confirmation dialogs will be displayed to let you know of the progress.

Working with Archived Names

As described above, the data in the archive file constitutes a permanent record of names removed from your membership list. The **Archive File dialog** gives you access to the names stored in your Archive file. The Archive File dialog has pages that let you browse, update, or delete names in the Archive file, and to print them.

The information in the Archive file is useful on its own merits, but it's also an important part of the reports generated in a Clerk's Report. Maintaining an accurate Archive file will assure that your membership records are complete and accurate.

Browse/Update Archive File

This page of the Archive File dialog displays names along with the information saved in a person's archive file. You can use the navigation buttons in the navigation bar in the upper right corner of the dialog to scroll around in the archive file, or you can click the Find Individuals button to see a list from which you can look up names you need to view, update or delete. Make changes as needed if you wish to update information.

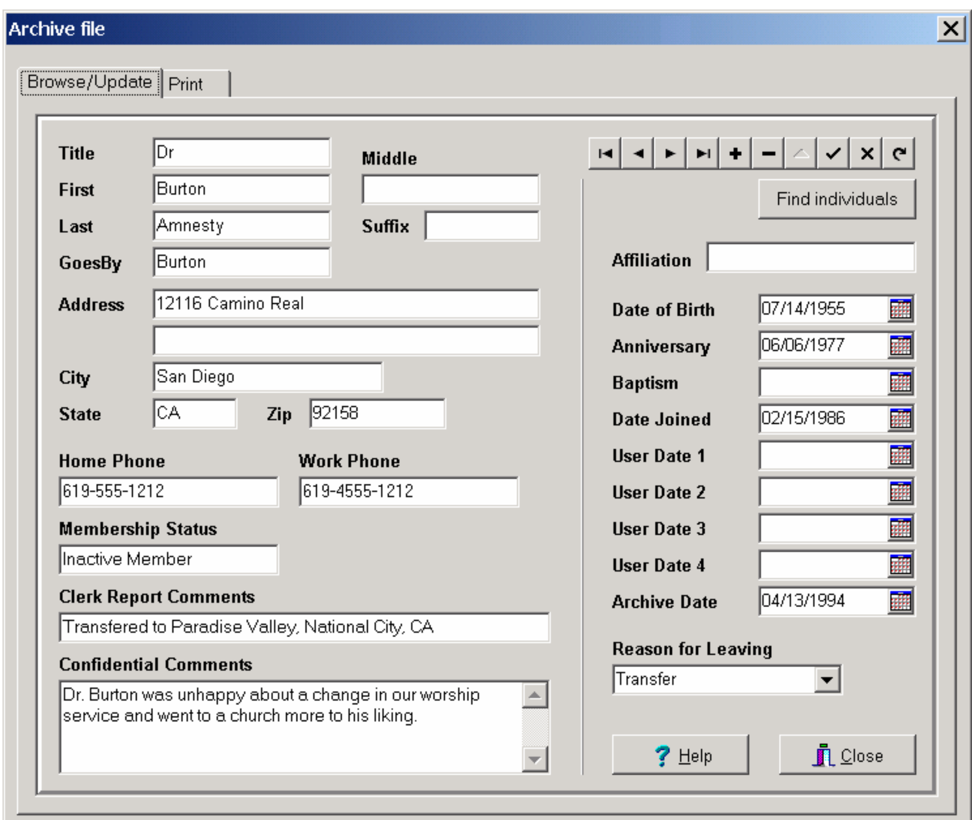


Figure 6.2. The Archive File dialog allows to you view, edit, add, delete, or print names in the archive file.

Add a Name

If you need to manually add a name to the archive file, click the + button in the navigation bar and enter the data in the fields as appropriate.

Remove a Name
To remove a name from the archive file, bring the name up to this dialog, then click the **-** button on the navigation bar.

Print Names in Archive File
To print names in the archive file, click the **Print** tab page. Here are the controls that you have to work with:

- **Selection**: This drop-down combo box allows you to select the group of names which will be printed based on their Archive Leave Reason menu information, or you may simply print All Names in the Archive File.
- **Output Form**: You may select Basic Report, Full Information, Statistics, and Merge.

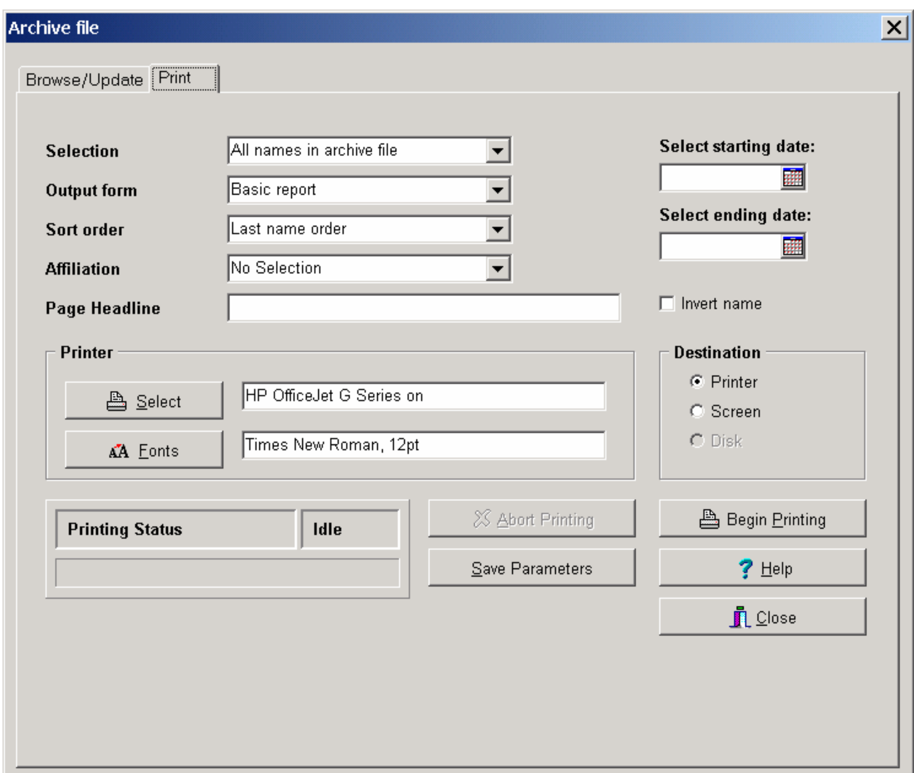


Figure 6.3. The Print page of the Archive File dialog allows you to print names in the archive file based on starting and ending dates.

- **Sort Order**: You may select Last Name order or Archive Date order.
- **Affiliation**: Select and Affiliation if you are in a multi-church district and you need to print a church-specific list of names from the archive file.
- **Starting and Ending Dates**: Enter Starting and Ending dates if you wish to narrow the list to a group of names which were archived within a specific period of time.

7
Print Names

Print Names provides the tools you need to view or print most of the lists and reports based on the information you've stored in your CMD data files. Print Names will take a little while to master simply because there are so many options from which to choose. Time invested learning the possibilities of Print Names will be repaid many times over!

To Print Names, click the **Print Names in File** item on the **Names Menu** when you are in CMD's main window. If you prefer, you may press **Ctrl-P** when no other dialogs are on the screen, or you may click the **Print Names Speed Button**. The Print Names dialog consists of two "pages." The page that you see initially is the **Selection** page. The other page is labeled **Print Control**.

Print Process Overview

The process of printing names can be summarized in three general steps:

1. choosing the names to be printed
2. choosing the way they'll look and where they will be viewed
3. telling the computer to begin printing the names

The **Selection** page is where you will accomplish step 1 above: choosing the names to be printed by selecting from among the various fields. Once you've selected the names you want included in the report, you will use the **Print Control** page where step 2, choosing how and where the names will be printed, and step 3, actually printing the names are controlled.

The Selection Page

The Selection tab page displays nearly all of CMD's data fields that you worked with on the Enter/Modify/Delete Names dialog, although they are shown in a different order. The Selection page is illustrated by the screen grab on the next page.

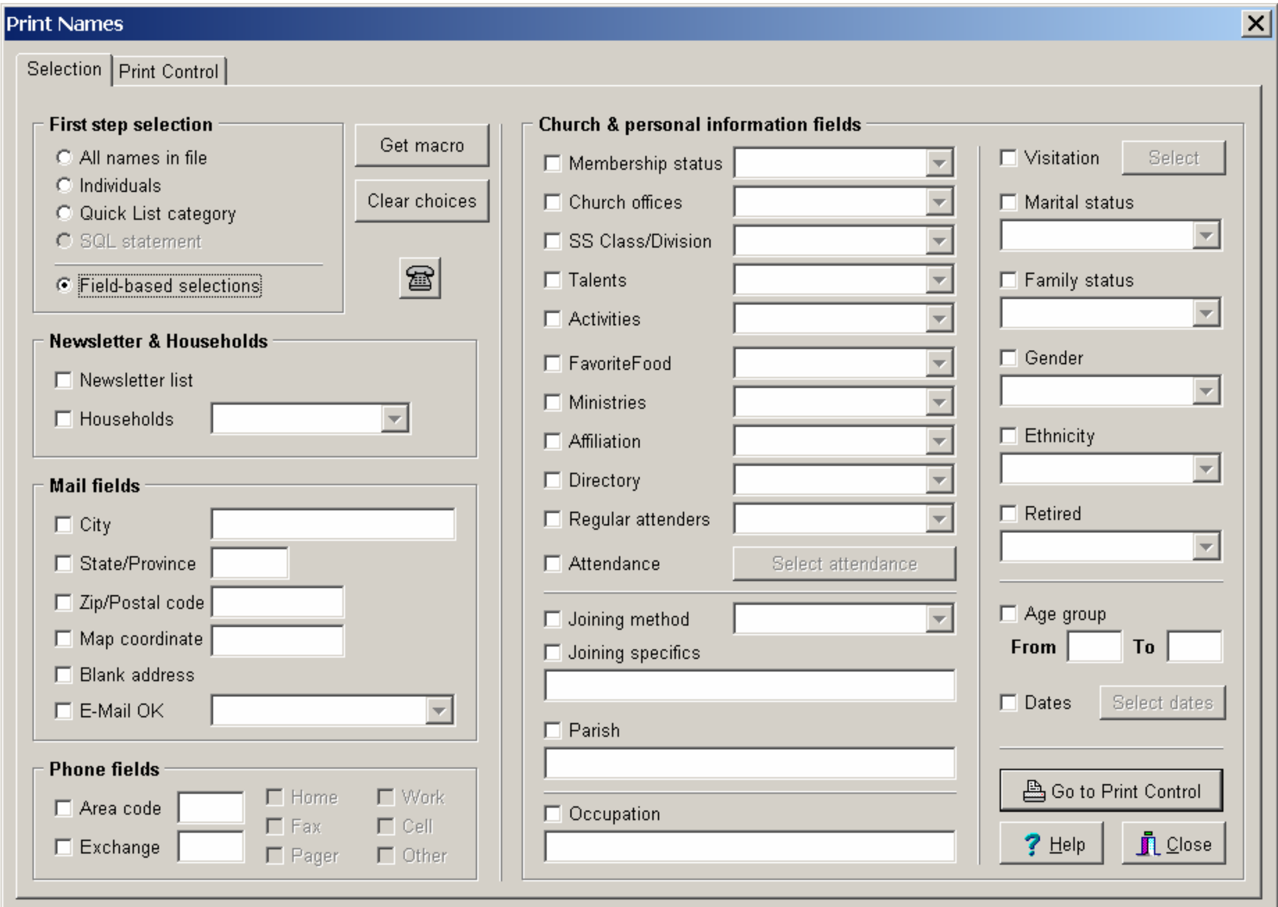


Figure 7.1. The Select page is where you indicate which fields form the criteria of the list or report you wish to generate. This is step 1 of the print process. Several of the fields above are user-namable fields and have been renamed. User1 has been renamed to FavoriteFood, User 2 to Ministries, and User 3 has been renamed to Parish. By changing these user-namable field names, you can tailor CMD to reflect your local ministry setting.

Why you need to Select Fields

In order to print a list of names or other report containing information in your file, you need to tell the CMD which names you wish to print. When you select a field, you are essentially telling the CMD, “print the names associated with, or based on, this particular field.”

For example, if you select **Zip/Postal Code**, you’ll be allowed to enter a zip code. Only names which have a zip code that matches the one you enter will be included in the report. If you select **Church Offices**, you can print a list of names who hold any church office or offices that you specify. If you need to print a birthday list, you would select **Dates,** where you will be able to specify which month or year’s birthdays you wish to print. *Until you specify one or more fields to use as criteria, the CMD won’t know which names to print for you.*

Important!

Note that the selection process does *not* involve selecting which fields will be printed in the actual report. That step comes later when you are at the Print Control page. On the Selection page, you use the fields to determine which names will be included in the list/report.

Where to Start

The first decision you'll need to make in selecting which names are to be included in your list will be made from the **First Step Selection** box in the upper left corner of the Selection page. Select from among the following choices:

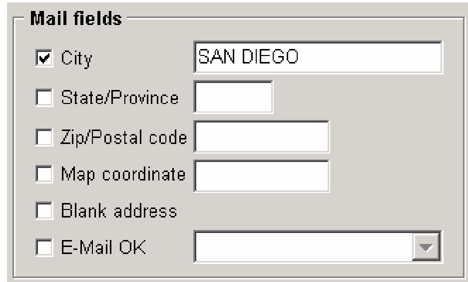
- **All Names in File**. Select this option *only* if you want to include every name in your file in the report. If you select this item, n**o other selections are needed on this page. Click the Print Control page to continue.**
- **Individuals**. Select this option *only* if you want to manually pick some individuals from the list of all the names in your data file. **No other selections are needed on this page. Click the Print Control page to continue.** When you click the Begin Printing button to actually print your list, a Name Search dialog will appear from which you may select the individuals to be included in the list or report.
- **Quick List Category**. Select this option if you wish for your list to be based on a Quick List Category. **No other selections are needed on this page. Click the Print Control page to continue**. When you arrive at Print Control, a drop-down list of available Quick List Categories will be displayed above the Name Formality combo box.
- **Field-Based Selections**. Select this option if you want to base your list on *any one or any combination* of CMD's data fields. When you select this item, all of the other fields displayed on the Selection page will become enabled. You can check *any number of them* that you need to define the list of names that you wish to print.

  The following information about selecting fields assumes that you have clicked on Field-Based Selections.

Selecting/Deselecting Fields

Once the Field-Based Selections radio button has been clicked and all the other fields on the Selection page have been activated, you will need to select one or more fields to be the criteria for the list.

To select a field, click on the small check box next to it with your mouse pointer. For example, if you wish to print a list of names who live in the city of San Diego, click on the check box to the left of the word City in the **Mail Fields** box. The box will be checked, and the cursor will be placed in the edit



control directly to the right of the **City field** so that you can type in the words **SAN DIEGO**. When this list is printed, only names whose City field says San Diego will be included in the list.

Or, perhaps you just want to print a Newsletter list. In that case, click the Newsletter field just below First Step Selection. **There are no additional choices which need to be made when you select Newsletter**. Most of the fields you select will require some additional input from you, but some, like Newsletter, only need to be selected.

If you wish to “deselect” a field, simply click on it again with your mouse pointer and it will be deselected. It will not be considered when CMD looks for names to be included in your list or report.

You can easily call for much more complex lists than the examples cited so far. For example, to print a list of inactive members who are Husbands who live in Atlanta who are between 20 and 35 years of age and live in map coordinate 54-B5, you would select Membership Status, Family Status, City, Age Groups, and Map Coordinate. **CMD allows you to select any of these fields in any combination to form the basis for your list!**

Specifying Criteria

Whenever you click on a field to include it as part of the basis for the list, you’ll need to provide the specific information for which CMD is to look as we did in the example above when we told CMD to look for names living in San Diego.

How you provide the required information depends on the nature of the field you select. Some selections simply place the cursor in an edit box where you type in what you are looking for. Others will bring up a pop-up or drop-down menu. Still others will bring up a whole new dialog from which to make your selections. Just make sure you provide the appropriate information for which CMD is to look when these choices appear! You can go back and alter any item at any time before you print the list if changes are needed.

Most of the fields which require some sort of additional input from you are self-explanatory. However, there are some which may not be so obvious:

Newsletter List: Only names marked to receive the Newsletter will be printed. *Generally, only one name per household should be marked to get a newsletter.*

If you wish to limit your Newsletter list to just member households or non-member households, also check the **Households** box and select Member or Non-member as needed from the list of choices.

Menu Fields: You may use *any number of choices* from *any* of the menu fields you select. This might be helpful, for example, if you want to print a list of members and you have defined several different member designations on your Membership Status menu.

When selecting more than one choice for any menu field as criteria for a list, names will be included if they match *any one* of the menu items selected.

When you select names by a menu field, you'll use the same dialog you used to select choices for the menu fields that you used when you were adding names. A screen grab of that dialog is on page 40.

Occupation/Retiree: Enter an occupation (it must be an exact match). After entering the occupation, press TAB and you'll be moved to the drop-down combo box to the right which will let you decide if you wish to print retired, non-retired, or all people with the occupation you just entered.

Map Coordinate: You may enter as much as you wish for a match. For example, you may ask for all the names on a given page just by entering the page number. If you want a page number and specific coordinate, enter all the information.

For example, entering 65 will print all names on map page 65. Entering 65-B5 will print only those names on page 65 that live within coordinates B5.

City: All names from the city you request will be printed.

Tip!

The City field provides an easy way to print a list of names with no addresses. If you leave the field blank when prompted to enter a City, CMD will search for names with a blank city. Be sure to check the **Print Names with Blank Addresses** check box on the Print Control page or no names will be printed!

Phone Numbers: You can print names by Area Code or by Exchange. Click on the one you wish to use as the basis for your list. Enter the three digit area code or exchange to be used as the criteria for the list, and then check each phone number that you would like to have CMD search when compiling the list of names whose phone numbers match.

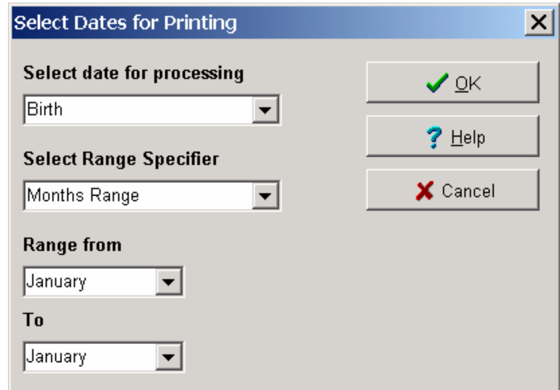
User 3: Text entered here must match exactly what's in each name's User 3 field that is to be included in the list of names.

Age Group: You may use either Age Group or the Dates function described next to print a list of names in an age group. However, there might be times when you need to print an age group along with some other date-based criteria. For example, perhaps you need to print a list of names whose birthdays are in August but who are in a specific age range. You will be asked to enter a lower age limit and an upper age limit. All names with ages falling within those ranges will be printed.

Dates: Birth, Anniversary, Baptism, Joining, Last Visit, User Dates 1 - 4, date of Last Update, and Visitation lists may be printed based on any of these date ranges:

- Any given month or range of months
- Any specific starting and ending dates
- Any number of years
- Any calendar year or range of calendar years
- Any blank dates

You make your selections for printing names based on date criteria from the dialog to the right.

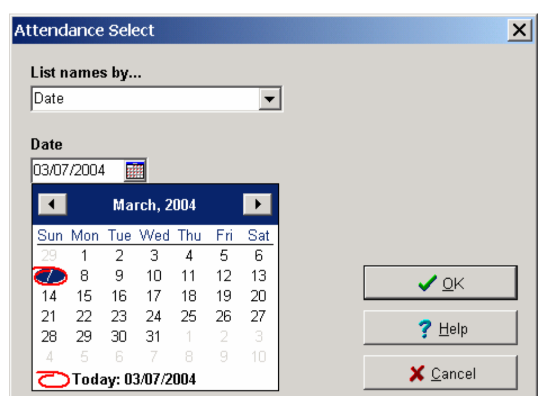


Start by selecting the date you wish to process from the drop-down menu. Then select the **Range Specifier** from the its drop-down list:

- Select **Months Range** if you want a list of birthdays in a given month or range of months.
- Select **Specific date to date** if you want a list of people who were born, say, between February 14, 1984 and September 16, 1986.
- Select **Number of years** to print names who are between, say, 21 and 35 years of age.
- Select **Calendar year range** if you want a list of people born between, for example, 1935 and 1945.
- Select **Blank dates** if you wish to search for all dates with a blank character in them. This will help you print a list of all dates that need to be updated to make your file's information more accurate.

The "Range From" and "To" choices under the Range Specifier group will change according to the Range Specifier you select, and represent the "range" of months, years, etc:

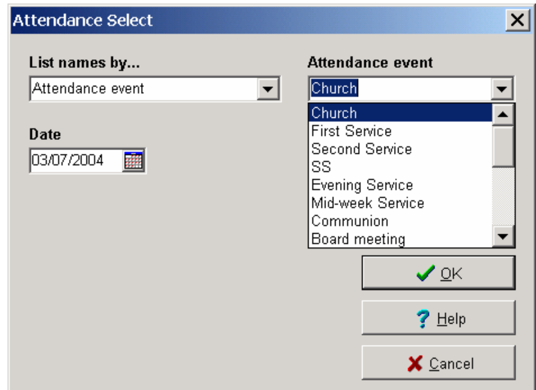
- If you selected ***Months***, enter any number from 1 to 12 as the lower month range, and any number from 1 to 12 as the higher month range. For instance, if you want all the birthdays in July, enter the number 7 as *both* the lower and upper range numbers. If you want all birthdays from January through May, enter 1 as the lower range, and 5 as the upper range.
- If your choice was ***Specific date to date***, you'll need to enter a complete month, day, & year.
- If you chose ***Number of years***, enter the lower range. If you want all names between 21 and 35 years of age, 21 will be the lower range, and 35 will be the upper.
- If you selected ***Calendar year range***, enter the calendar years as needed. *Don't enter a year as 1935*, for example. Just enter 35 as the lower and 45 as the upper range according to our example a couple of paragraphs above.
- ***Blank Dates*** does not require a range entry.



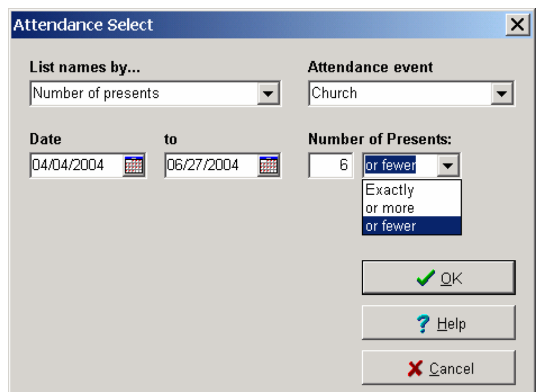
Attendance: This field option lets you print names based on their attendance. *You must have already marked attendance for your names before this field will be of any use to you.* The chapter on the Attendance Tracker gives information on how to mark attendance.

When you click on Attendance to select it for printing, the Attendance Select dialog will display only what it needs to list names by **Date**. Only a date entry edit box is required so that you can enter in the date for which attendance should be checked. Any person in attendance for any attendance event on that date will be included in the list of names that is compiled.

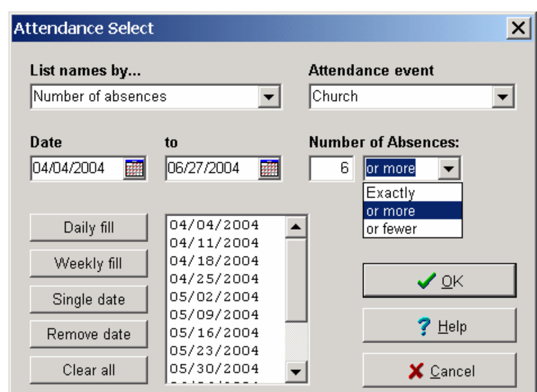
There are three other “List Names By” choices that can give you more specific lists:



- The **Attendance Event** option lets you narrow the names down to only those who were marked present for a specific event on a certain date. Select the event from the drop-down list and enter the date of the event. Only those names present at the event on the date you chose will be printed.



- The **Number of Presents** option prints only those names who were marked present for a specific event during the time frame you specify. Note that you can have names considered who were present exactly the number of times you specify, more than, or fewer than the number you specify.



- The **Number of Absences** option prints only those names who were marked absent for a specific event during the time frame you specify. Names will be included who were absent exactly the number of times you specify, more than, or fewer than the number of times you specify.

  There is an additional set of choices that you *must* make for calculating absences, however. You must specify an explicit list of dates for the event selected that CMD can use to calculate absences (the program can’t make calculations about something that’s not there!).

  If the event is a regular weekly or daily event, you can click the **Daily Fill** or **Weekly Fill** buttons to automatically insert the appropriate dates for CMD to check. If the event is held on irregular dates, enter the date in the first date field and then click the **Single Date** button to copy that date to the list. You can also remove any selected date from the list and clear the entire list.

Important!

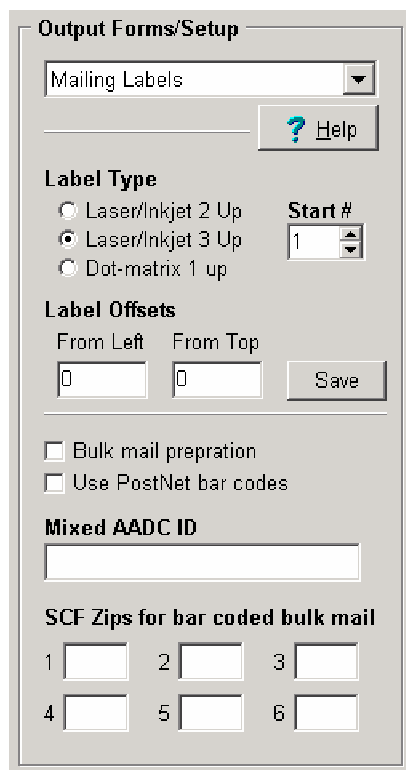
You will likely need to select another field along with Attendance when you want to print a list by the number of absences otherwise you'll get every name in your file who was not there for the dates and event you specify! Generally you should limit this list to a specific SS class or other smaller group in your database.

When You're Finished Selecting Fields

Once you have selected all the fields you wish to include as part of the criteria for the list, click the **Print Control** tab page or click the **Go to Print Control** button on the lower right corner of the Selection page.

Print Control

It is from the **Print Control** page that you control step 2 of the print process, deciding *how* the names will be printed (labels, postcards, etc), and *where* they will be viewed (printer, screen, or disk), as well as step 3, starting the actual print process. The Print Control page is divided into two general areas.



The area to the left of the page is where you will select from among the various **Output Forms** available from a drop-down list. Parameters specific to the particular output form you select are displayed directly under the Output Forms drop-down list. The items displayed here change whenever you change output forms. The example to the right shows the parameters that you can adjust when Mailing Labels has been selected.

The help button located directly under the Output Form drop-down list provides context-sensitive help for the output form currently selected.

Make all of the adjustments you need to the parameters before initiating printing.

The right 2/3rd's of the Print Control page contain parameters that affect virtually all of the output forms (there are some minor exceptions). Use these controls when you need to change the order of the names listed, where they will be viewed, or what printer will be used. These parameters will be explained more fully following the section describing output forms.

Output Forms

The **Output Forms** combo box provides you with a number of predefined report formats which you can use to print your data. One of the forms, ASCII Export, allows you to select many of the data fields for export to a word processor, data base, or spreadsheet program where you may use the fields to create your own forms if you wish.

To view the Output Forms options, click your mouse pointer on the small down arrow icon on the right hand edge of the Output Forms combo box in the upper left corner of the Print Control page. Many of the options have parameter choices which are unique to that particular output form that should be set before you begin printing the actual list. Following is an explanation of each output form.

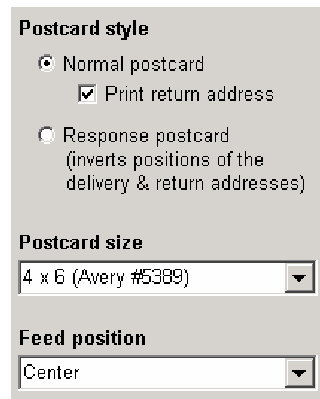
Mailing Labels: CMD's label forms are compatible with standard Avery labels. Use #5161/5261 or equivalent for 2-up labels, and #5160/5260 for 3-up. CMD is optimized to print primarily to lasers and ink jets, though you certainly can print labels on your dot-matrix printer.

- **Label Types**. You may select from among Avery form numbers for 2-up, 3-up, or dot-matrix printing.
- **Start #.** You can dial in the label position number where the printing should start in case you have a sheet of partially used labels. For laser/inkjet labels, there will always be 10 labels in a column, and there will be either 2 or 3 columns per page depending on the Label Type you selected. Label 1 is always the label in the upper left corner. To find the label on which printing should start, count down the column (not across). Label 10 is always the label in the lower left corner at the end of the first column, and label 11 is always the top label in the second column.
- **Label Offsets.** If CMD does not align the label text correctly on your printer, use the Offset values to adjust where the printing begins. You may enter negative values if needed. Click the **Save** button so that the next time you print labels the same offsets will be automatically used.
- **Bulk Mail Preparation.** If you want CMD to sort your names for USPS bulk mailing, check Bulk Mail Sort. Your local post office can advise you of the SCF Zips you should enter for bulk mailing in your area.
- **Use Post Net Bar Codes**. Select this option *only* if you need to print bar coded labels for bar coded bulk mailing.

  Special note! Do not check the Use Post Net Bar Codes option along with the Bulk Mail Preparation item unless you wish to sort for bar-coded bulk mailings. CMD sorts the labels differently for bar coded and non-bar coded bulk mailings.
- **Mixed AADC ID**. This edit block is designed to hold the USPS designation for the mail service center to which you take your bulk mail and is only needed for bar coded bulk mailings. Contact Software for Ministry for the information needed for this field if you print bar coded bulk mail labels from CMD.
- **SCF Zips**. These are 3-digit local zip codes that your local mail service center will ask you to keep separate when you do bar coded bulk mailings. When required, enter the 3-digit zips

that you are given by personnel from the mail service center. When you click the **Save Parameters** button, this information will be saved and will be retrieved the next time you print labels.

One additional feature of note for Labels: If you enter text in the Page Headline field, it will appear as the first line of text on every label. One example of how this feature might be useful is if you wish to send a letter to parents of children in a specific SS department. You could call up names in the department, select Mailing Labels, and enter text such as “To the Parents of” in the Page Headline field. This will address the letter then to the parents of each child in the department.



Postcards: Prints the name and the church’s return address on postcards, providing an extremely fast and efficient way to send out reminders or announcements.

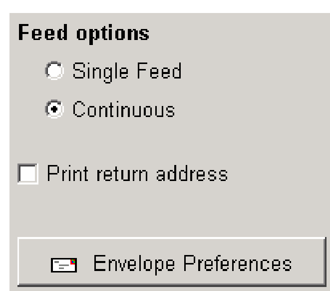
You can print normal postcards, postcards without a return address, or a Response Postcard, which switches the return and delivery addresses so that the postcards become response cards. Click on the choices you need. Note that the Return Address used for the postcards are selected by using the Return Address combo box described below.

Select 4 x 6 postcards for 2 cards per page, 3.5 x 5.5 cards for 3 cards per page, or USPS pre-stamped cards. See page 19 for more information.

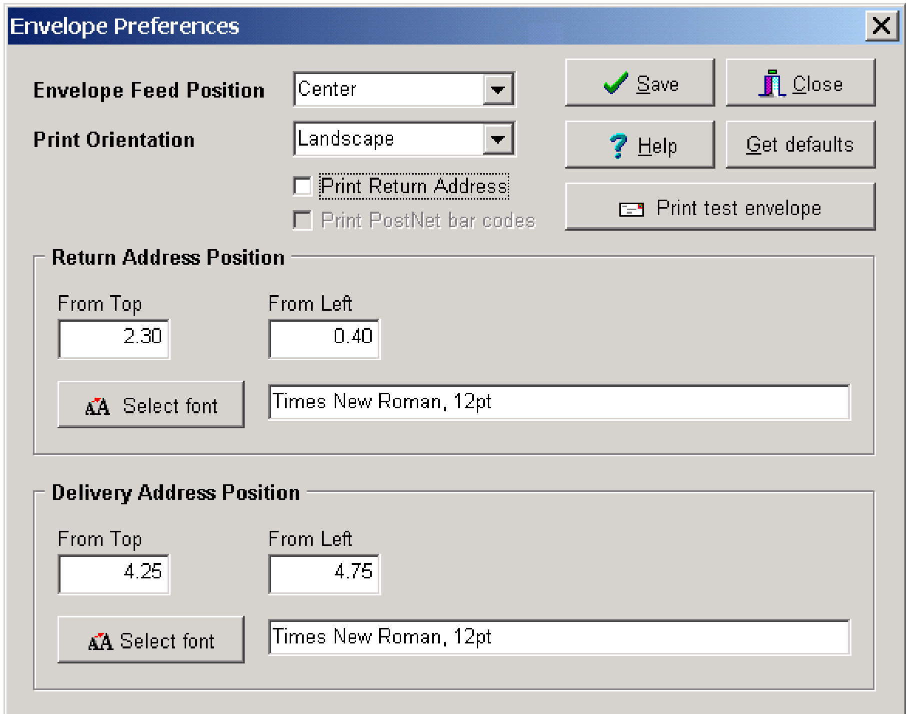
Tip!

CMD prints two names & addresses per sheet. Once the names & addresses are printed, you can turn the cards over and compose/print the message portion using your word processor. This provides a quick and inexpensive means of creating and sending announcements for upcoming meetings, programs, or other notices.

Envelopes: If your printer is able to handle envelopes, you may address them with this Output Form. When Envelopes are selected, you’ll see these options:



- **Feed Options**. Select either single feed or continuous. Select continuous only if your printer has a bin which allows you to feed a number of envelopes in at one time. If you select single feed, you’ll be prompted to feed one envelope at a time as the printing progresses.
- **Print Return Address**. Check this box if you wish to have CMD print the currently selected Return Address on the envelope.
- **Envelope Preferences**. There are a number of preferences which you can set to help position the text for the envelope correctly on your printer: When you click the Envelope Preferences button, the dialog on page 65 appears.

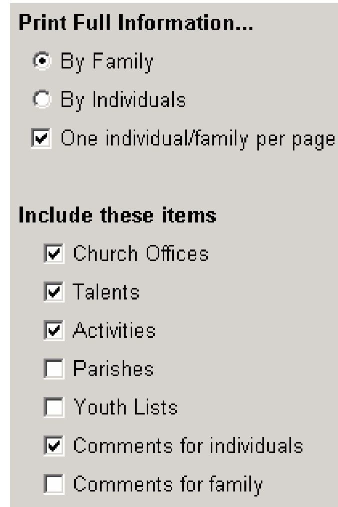


The parameters you can set on the Envelope Preferences dialog above include:

- **Envelope Feed Position**. Select Left, Center, or Right feed position.
- **Print Orientation**. Select either Landscape or Portrait. Most printers will use a Landscape orientation.
- **Print Return Address**. If you do not wish for CMD to print a return address on the envelopes, leave this item unchecked.
- **Return Address Position**. These values fine turn for position of the return address within the boundaries set by the Envelope Feed Position.
- **Delivery Address Position**. These values fine tune for position of the delivery address within the boundaries set by the Envelope Position.
- **Fonts.** You can separately determine the fonts for both the Return and Delivery addresses.
- **Get Defaults**. Click this button if you wish to reset the envelope preferences to the default values that are initially set in CMD.

To see if your envelope alignment is correct, click the **Print Test Envelope** button. We recommend that you use blank paper and align an envelope to it after the test is printed to check out alignment so that you will not waste envelopes while getting the settings the way you want them.

Note: You can also gain access to the Envelope Preferences dialog via the Preferences Menu.



Full Information: This option prints nearly all the information stored about your names in abbreviated form.

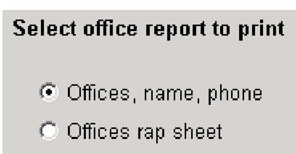
Because some items of information may be lengthy for some names, CMD allows you to decide whether or not to include some items of information available for printing in Full Information reports. Click the items to tailor the Full Info report as needed. You can print the report in a family grouping if you wish, and you can also elect to print a single name or family on one page.

Name, Address & Telephone: This list prints the name, address, home, work, fax, and other phone numbers. If the family tie is included, their phone numbers will be printed as well. You may elect to either print just Home and Work phones, or all phones, and e-mail.

Name & Phone: This list prints only the name and phone numbers. This list might be most useful for nominating or phone committees who need to have the latest name and phone information. You may elect to either print just Home and Work phones, or all phones, and e-mail addresses.

Individual Name Only: This option displays only the name of people who are included in the list.

Family Name Only. This option displays only the information in the Family Name field for persons included in the list.



Office Reports: Use this Output Form if you need to print a list of names showing which church offices or ministry positions people hold. There are actually two reports you may print. **Offices, Name, Phone** is a basic report that shows the people's name and phone info, plus any offices they hold.

The **Offices Rap Sheet** contains a lot more information including present offices/ministries, past offices/ministries, and interests as well as a picture if one has been defined. Either of these forms are very handy for nominating committee or ministry selection work.

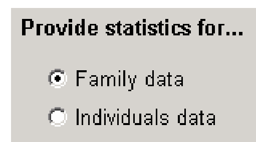
Visitation Reports: Four different options for Visitation Reports are provided. To select among them, click the appropriate radio buttons below the Output Form drop-down list. Your options:

- **Visitation Cards**: Prints some abbreviated personal information on Avery #5389 4 x 6 postcards. There is also some room on the card to mark the name of the visitor, the date of the visit, and some comments. You can use the back of the card for more comments if needed.
- **Visitation Roster**: This form is used to print a list of names in landscape orientation which you can use as your target list of people to be visited. It prints name, address, city, phone, map coordinate, date of last visit, and a column in which to write the date the visit took place.

- **Visitation Log**: This form prints a list of names and displays information about the *last recorded visit* in the Visitation Tracker available in Update Names for each person. In addition to printing all the names you selected on the Field Select dialog, you may further elect to narrow your list to names with no visitation records at all, or only people who have visitation records.
- **Visitation History**: This form prints *all* the recorded visits and associated information about each of those visits.

Note that you can also limit the list printed to only those names who match the criteria you selected on the Selection page to names in the visitation file, names NOT in the visitation file, and all the names that match the criteria you specified on the Selection page.

Comments Only: If you need to print copies of the comments stored for your names, select this Output Form. Prints the name and then their comments on regular paper.



Statistics: This choice will print statistics based on the fields you've selected. You will be given breakdowns of how this list of names falls into the various fields. Often it is useful to know the stats for the whole file, and at times it would be helpful to see what a sub-group of your list looks like when distributed among the fields. This could help point out balance of leadership or participation in your church by sex, age, ethnicity, geographical area, etc.

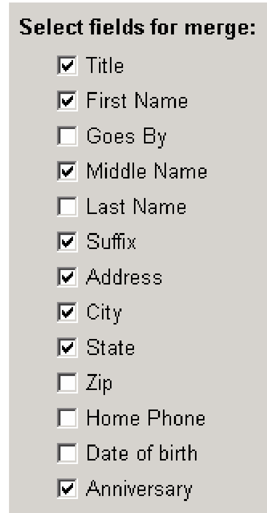
You will need to choose between Family data and Individual data to reflect the type of selections made for the list from which the statistics is drawn. Note that if you select Individuals data with a family-based list, the items reported may not be accurate!

Dates: The dates option will print the name and your choice of 4 date formats. Make your selections from the options on the screen grab.

Note that you must also select the date that you want to print. The date you wish to print is a separate choice from any date selection criteria you might have specified on the Selection page.

Also note that you can elect to mask out names that have a blank date in the date field you have selected to be printed along with the name.

The Sort Order control affects the order in which names are printed when printing name and date lists. If you wish to print your list in date order, select that option on the Sort Order combo.

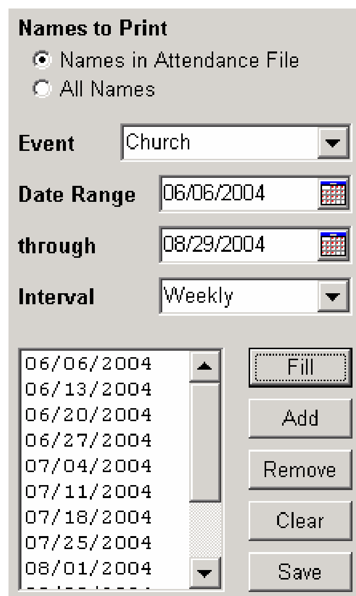


Mail-Merge: This option is designed to output names to disk so that you can incorporate them into your word processor for doing mail merges. When you click the **Begin Printing** button, the standard **Windows File Save dialog** will appear. Name the file and place it in the appropriate directory for importing into your word processor. The data saved for each name includes name and mailing information in this order: first name, last name, address, city, state, zip. Each field is delimited by a comma.

To select which fields are to be included in the merge, check the items from among the options displayed when the Mail-Merge Output Form is selected.

Zip Code Breakdown: This list will print a four-column breakdown of the number of names living in each zip code based on the fields you've chosen. The zip code will be printed with the number of names from the list that live in that code. When you select this option, your list will immediately be sorted into Zip Code order. Be sure to change it back to Alpha order if you need to print another list afterwards!

Attendance Grid: This output form prints names in a grid format which allows easy viewing of attendance. The parameter options for this output form:



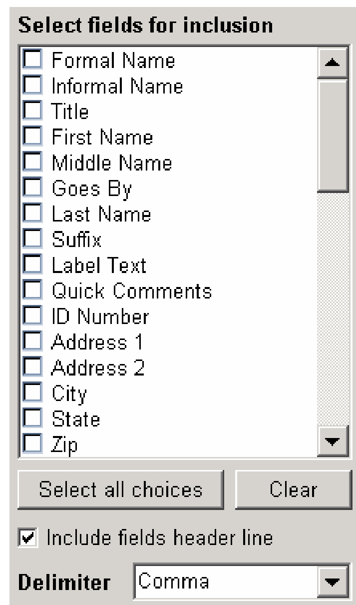
- **Names to Print**. Start by selecting either Names in Attendance File, or All Names. This means that you can limit the names appearing on the grid to only those names within the group of names selected on the Field Select page who have been marked present for an attendance event in the past.
- Next, select the **Attendance Event** from the drop-down list .
- Third, select the **Date Range** by entering the starting date and then the ending dates by either typing in the date directly, or by clicking the calendar icon at the right edge of the date range edit boxes.
- Select the **Interval**. If you select weekly or daily, click the Fill button to bring down to the list of actual dates to be printed into the box which displays them. If your interval selection was Weekly, then an entry for each date a week apart starting with the date entered in the edit box to the right of Date Range and ending on or before the date entered in the Through field will be automatically placed in the box showing the list of dates. If your interval was daily, then each date from the start to ending dates will appear.
- If **Custom** is selected as the interval, enter dates for the grid by entering the date in the date edit box to the right of Date Range and then click the Add button. Add as many separate dates as needed.
- To **Remove a date** from the list (and thus from being reported on the grid), click on the date

in the dates list and then click the Remove button.

- Click the S**ave/Retrieve button** to either save the date list, or, if the box is blank, retrieve a date list from your hard disk.

Name and E-Mail. Use this form to print names along with their e-mail.

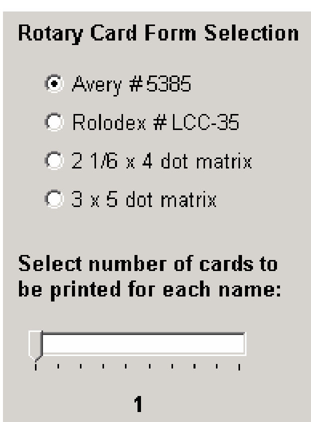
Name Count Only: Sometimes all you need to do is find out how many people there are in the combination of fields you selected. This Output Form doesn’t send any data anywhere. It just counts up the names, and displays the total names in your list just above the progress meter in the lower left corner of the Print Names dialog.



ASCII Export: ASCII Export is useful for transferring CMD information to other programs such as spreadsheets, data bases, or for mail merging.

Click on each field from the list that you wish to include in the export. If you wish to include a header line in the export file that lists the fields (useful when doing merges or trying to deduce what the fields were that were exported), check the Include Fields Header Line check box. You can select the delimiter from the drop-down list as needed. Generally, you should use Comma as the delimiter.

When printing is initiated, you will be given a standard Windows Save dialog to enter the name and path of the text file which will be created. Once printing is finished, you can call up this text file in the word processor, spreadsheet, etc.



Rotary Cards. This output form can print standard rotary cards of families in your data file. The first choice offered, the Avery card, is a small size card. The Rolodex stock number is a standard 3 x 5 card. You can select dot-matrix rotary forms if you wish as well.

Under the place to select the rotary form, there is a slider that you can use to determine how many rotary cards should be printed for each family. The default is one, but you may have it print up to 10 copies of each card if you need to distribute cards to many people.

Family Visitation Card. This output form prints basic name, phone, birth date, and anniversary information for a family on CMD standard 4 x 6 inch postcards.

Child Registry. This output form prints the same Child Registry page available in Enter/Modify/ Delete Names when accessing the Child Registry fields. See page 44 for more information.

Printing a Church Directory

Church Directory Output Form. This output form offers a wide array of controls for the printing of a formal church directory from the names in your data file. In addition to the parameter controls available for printing church directories, there are two additional dialogs available to help determine how your names will be printed.

Preparing/Troubleshooting Your Data for Printing a Church Directory
The Church Directory listings you can print here depend appropriate use of several of the data fields in CMD. Here are some important tips and trouble-shooting issues:

- If a family that has an address does not print with an address, go back to Enter/Modify/Delete Names and look up the family in question. Click the **Settings** page on the small tabbed notebook containing the addresses just below the Family Name field in the Family Data area. Make sure the Address for Directory field is set to a valid value. For most people, it should be set to Residence address.
- If a family names prints out like this: *** Smith, John *** with asterisks around it, CMD is telling you that there is an error condition in your data that needs attention before the name or family can be properly printed in the directory. Likely, one of three conditions are present:

  1 the family is marked to be included in the church directory, but no members of the family were marked to be included

  2 there are no adult-level names in the family unit. CMD requires at least one adult-level name, or an Independent Minor

  3 there are two adult-level names with the same Family Status (except for Partner, which is allowed)

  Removal of the conditions listed above should eliminate the asterisks in the name.
- If the last name of a child or spouse is also printed along with that of the husband or single adult or parent, then check each name for extra spaces or other spurious characters. Do not leave the last name field blank in any person’s record. This will cause some spacing errors when the directory is printed.
- We suggest that generally you should follow this selection procedure when preparing to print a church directory:

  1 Select Field-Based Selections.

  2 Click the Directory item about mid-way down the center column of fields on the Selection page.

  3 Select the Families Marked for Directory item.

  4 Go to Print Control, set the parameters the way you want them, and print.
- Finally, we suggest that for any sort of long or complicated church directory that you send the names to a disk file and then open it in your word processor where you will have finer control over fonts, margins, columns, and page breaks.

Church Directory Parameters

Directory Format. There are four basic styles, most of which can be varied by using the available controls that change the way the names print. In brief, Format A prints with the home phone number to the left of the name and address. Format B prints phone numbers either above or below the name and address (plus you can select additional phones to be included), and Format C, which prints the phone number to the right of the name and address. For samples of each of these formats, click the Help button located directory below the Output Forms drop-down list, and then click the links to each format sample.

There are two pictorial-style formats. One prints a page of pictures with names. The second pictorial format adds the phone number. In order to successfully print pictorial directories, you must first assign pictures to the names in your file. See the information on pages 23-24 for specific format, dimension, and resolution rules for properly using pictures in CMD. Note that you cannot send pictorial directories to disk.

The final Church Directory style is an ASCII Export form that can only be printed to disk. Use this format if you need to export fields in order to create your own directory format in another program such as Word of Excel.

Tab Space. In Format A, the tab space is the amount of space between the left margin and the beginning of the name and address information. In Format B, it's the indent space of the phone fields past the name and address lines. In Format C, it's the amount of space that family names are offset relative to the position of the Family Name line.

List Dependents on a Single Line. If you don't check this box, each dependent will be printed on his/her own line.

Include E-Mail Address. If you wish to have e-mail addresses included in the directory, check this box.

Override Phone Confidentiality. Check this box if you wish to print all phones regardless of the setting of the Confidentiality fields.

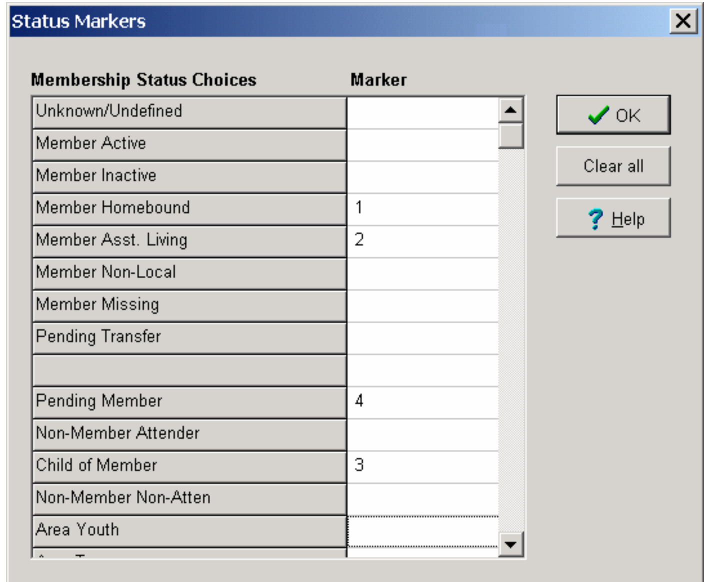
Print Last Name in Bold. Generally this item will only be checked if you wish to print last name first (most often used when you check the Invert Name check box).

Titles Separator. Select from the drop-down list of options how titles are to be separated.

Names Separator. Select from the drop-down list of options how names of husbands and wives are to be separated.

Blank Lines Between Names. Scroll to select the number of blank lines that will be printed between each family printed in the directory.

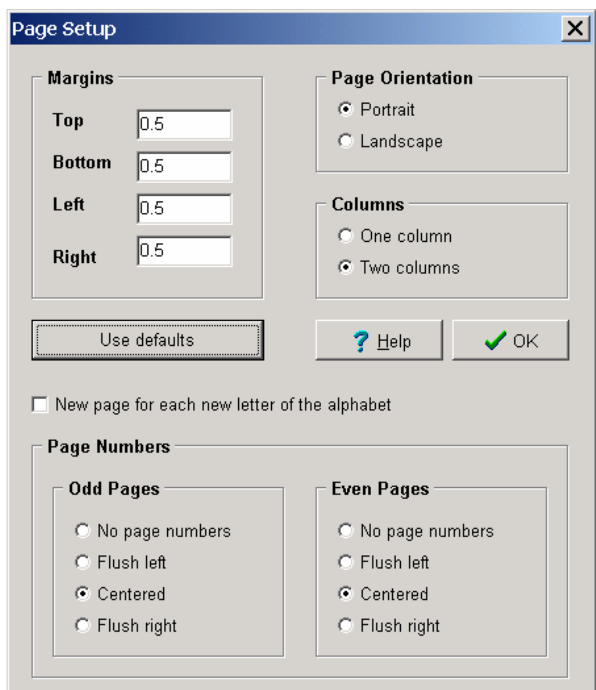
Status Markers. CMD allows you to mark names in a church directory with special codes so that you can differentiate between some of the names printed based on the Membership Status field.. For example, you may wish to mark names of non-member attenders (spouses and children of church members who are not themselves church members). Perhaps you want to denote Homebound, or out-of-area members. The status marker dialog, available when you click the Status Markers button, allows you to specify what marks will be used for any given Membership Status.



The status markers themselves will be printed as superscript characters (unless you print to disk - in which case you'll need to do a find and replace operation in your word processor so convert status markers to superscript characters).

You may enter up to 5 characters. We suggest that you leave a blank space first and then enter a number or character. You may wish to include parentheses. You can then print a legend of the numbers or characters for the first page of your directory.

Page Setup. The Page Setup dialog allows you to lay out the page in columns, change the orientation, and even print page numbers. You can determine the margin settings to be used, and you can check a box that will force a new page to be started whenever the first letter of the last name changes.



None of these items have any effect on the church directory if you are printing your list to disk for importation into your word processor.

Other Parameter Settings

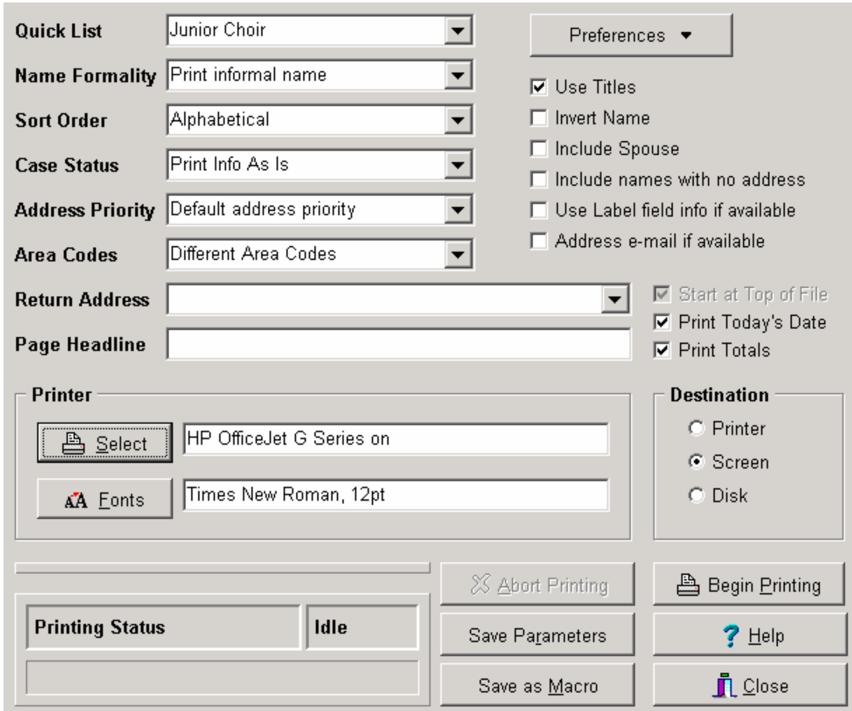
You can use many of the other parameters on the Print Control page to affect the ways names are printed in a church directory. Name Formality, Case Status, Area Codes, Use Titles, and Invert Name all affect the printing of the church directory.

Printing a Directory in Booklet Form

CMD does not include a built-in mechanism to print your church directory in booklet form for camera-ready copy. This feature is, however, included in many major word processors and page layout programs.

General Print Control Parameters & Controls

The right 2/3rds of the Print Control page provides a number of controls that allow you to set various parameters that affect the way your printed lists will look and where they will be viewed.



Quick List

The Quick List drop-down list, **visible only when you have selected Quick List in the First Step Selection described on page 57**, provides a listing of all currently available Quick Lists. To print a Quick List, select the item from the list and set the rest of the controls and parameters as you normally would.

Name Formality

Many output forms have a default Name Formality available. That means that when you select a particular output form, either the Formal Name (First Name) or Informal name (Goes By) will be printed based on your choice. The Name Formality setting may be overridden at any time by opening up the Name Formality drop-down list and making a different selection. To set the defaults for Name Formality, click the Preferences button, click General Preferences, and then click the Name Formality tab.

Sort Order

This determines the order of your list: alpha, date, or zip/postal code. The default choice is Alpha order. To view or select another choice, click the small down arrow icon on the right edge of the **Sort Order combo**. Click on your choice with the mouse.

Case Status

Click the down arrow icon to the right edge of the **Case Status combo** to see your options: print info as is, print the last name in upper case, print the full name in upper case, or print all info in upper case. Click on the one you want. If your national postal service wants address information in upper case, select All info upper case when you print labels or postcards.

Address Priority

CMD allows you to enter a number of different addresses for an individual. In general, output forms that are mailing related such as labels, envelopes, and postcards will automatically print using the mailing address. Other forms, such as visitation forms, will automatically print a home address if one is available instead of the mailing address.

The Address Priority parameter allows you to override these automatic settings and print using any of the addresses when available instead (except for International addresses). Select the address you wish to print when available by selecting a choice on the drop-down menu.

Area Codes

When phone numbers are printed, this parameter affects the printing of the area codes. You may print all area codes, no area codes, or only those area codes which differ from the default area code. Open the **Area Codes combo** to see and select your choice.

Return Address

From this combo box you may select any of the active return addresses defined in your system. Click open the combo box and make your selection. If you need to enter a new or temporary return address, use the **Define Return Address option** on the **Preferences Menu**.

Page Headline

Click in edit box to the right of the Page Headline label and enter up to 50 characters for the headline to accompany a list. Not all lists will work with a headline, but many will. The headline will be printed on each page of the report.

Use Titles

Check this box if you wish to include titles with your names. If you do not wish to print your list with titles such as Mr. or Mrs., make sure this item is deselected. You can select/deselect this item by clicking directly on it with your mouse pointer, or by pressing the Space Bar when this item has focus. Note that titles will be printed **only** if you entered them with the names and the title appears in your Titles Preference!

If both **Use Titles** and **Include Spouse** are selected *and if both names have a title*, the name will be printed like this:

> Mr. & Mrs. John Smith

However, if either name does not have a title, the titles will be dropped for both names, and both first names will be printed instead like this:

> John & Mary Smith

Invert Name

When checked, this item reverses names like this: Doe, John. This format might be helpful if you are printing a record number list to make name location easier, or for a name and phone list for your Nominating Committee to use.

Include Spouse

When selected, this item will print the names you have selected with the addition of their spouse.

Make sure that you have chosen appropriate fields if you decide to include spouse. If you elected to print All Names and Include Spouse, then the CMD will print names like this:

John & Mary Smith (and then...)

Mary & John Smith

If you get duplicate names like this, you should go back to the Selection page and make your selection criteria more specific.

Include Names with No Address

Even if you have chosen to store names without addresses in the CMD, you may not wish to have them printed with every list you make. Mailing labels are a good example since printing names with no address simply wastes your stock. If you do not wish for them to print, leave this item deselected.

If you are trying to print a list of names with a blank city to find all the names in your file with blank addresses, be sure to select this item otherwise names with blank addresses will still be masked out!

Use Label Field Info if Available

Check this box if you wish to CMD to use any available **Label field** information in place of the information in the name fields when printing a name in a report.

Address E-Mail if Available

Check this box if you wish for CMD to automatically address an Outlook e-mail message for each name in your list who has an e-mail address and whose “OK” field is checked. Labels, postcards, or envelopes will be printed for those names that do not have an e-mail address.

The names will go into Outlook’s BCC address field (blind carbon copy) so that e-mail addresses of each person receiving the e-mail will not be exposed to the other names also receiving the e-mail.

This feature has been tested on several versions of Outlook, but we cannot guarantee that it will work in every version.

Start at Top of File

This feature is not yet enabled in CMD.

Print Today's Date

When this item is selected *and when you've entered a Page Headline*, the current day's date will be printed at the top of each page at the right margin. Make sure the date in your computer is correct!

Print Totals

This item prints the total number of names printed after the last name in the list is printed.

Destination

This item controls where the list will be displayed or viewed. There are three possible options, Printer, Screen, and Disk. However, there are different specific options for each Output Form. Any choices not available for a specific Output Form will be disabled so that you cannot select it when you change Output Forms.

There are some **special features** available for most output forms if you print first to Screen instead of selecting Printer as the Destination. For many forms, you can print your report to **Adobe's Acrobat (PDF) format, or to RTF format.**

To access either PDF or RTF formats, select Screen as the Destination and print the report. Once the preview screen shows the report on your monitor, click the preview screen's File Menu, select Save As. When the Save dialog appears, you'll need to navigate to the folder on your computer where you want to save the file, provide a file name, and finally, open the Save as Type box and select either RTF or PDF. Do not select the NDR format. That is an internal format for use by the print engine that CMD uses. Any PDF files created should work with any recent version of Acrobat Reader.

Printers & Fonts

CMD gives you access to Windows printer drivers and fonts. The Printer box displays the currently selected Printer and Font. Click the button for the item you wish to change.

Most CMD forms have been optimized to work with Times New Roman, 12 point. Some Output Forms require some adjustments in order for the information to fit the form. We recommend that you start with this or a very similar font, and make adjustments as necessary.

Whenever changes need to be made, you'll be working with standard Windows font and printer select dialogues to make your selections.

Command Buttons

The lower, right hand corner of the Print Control dialog has six different buttons which you can click to control the printing process.

- **Begin Printing**: Click this button only after you've made all your selections from among the various parameters provided. This initiates the actual printing process.

- **Abort Printing**: This button becomes enabled only after you've clicked the Begin Printing button. If you think you'll need to use it, you'll have to act fast!

  In Windows, the entire content of a report is sent to a special disk file before anything appears either on your screen or on your printer. All printing to the screen/printer is drawn from this disk file, and not when each name is encountered when going through the names in your file.

  This means that the first stage of the printing will likely go very fast. When you initiate printing, you'll notice that the progress gauge moves rapidly. When it reaches 100%, this means that the data has been "printed" to the disk file, and will now be sent either to the printer or the screen.

  If you are sending the list to your printer, at this point CMD no longer has control of the list! This means that if you wish to interrupt the printing, you will have to leave Print Names entirely, minimize CMD, and open the Print Manager icon on the Windows task bar and cancel the printing from there.

- **Save Parameters**: This button saves most of the parameters as they now are in the Print Control dialog. The next time you come to the Print Control dialog, these same settings will be restored. This allows you to set up Print Control in the way you normally use it. Of course, you can make changes to any of the parameters any time you need to. This just gives you a way to establish your own preferences for general use.
- **Help**: When clicked, this button provides a general help topic screen for the Print Control dialog. You may jump via hypertext links to related topics from here. You may also press F1 for specific help for the item which currently has focus.
- **Close**: This button clears away the Print Control dialog and returns you to the Field Select dialog to either select names for another list, or to return to the CMD Main Menu.

Printing a Range of Pages

There may be some cases where you don't need to print all the pages of a report or list. CMD allows you to specify printing all pages, a specific page, or a range of pages.

To access this feature, follow these steps:

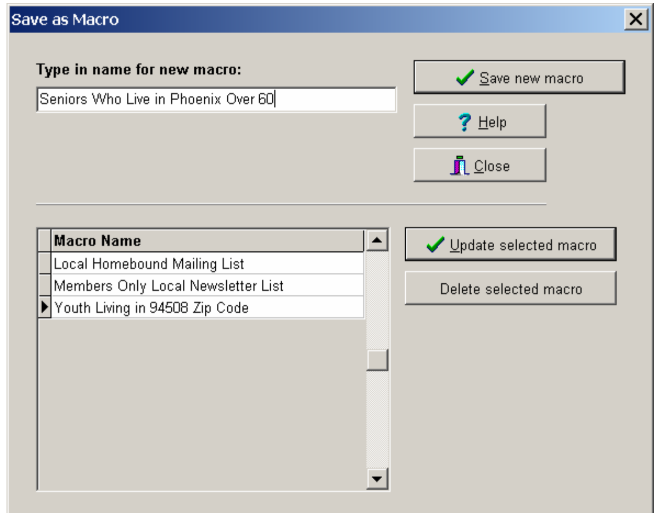
- Select Screen as the Destination
- Click Begin Printing to initiate the printing
- Once the report is on the **Preview screen**, click the printer icon at the top of the preview screen
- Select All, Selection (for selecting a specific page #), or Pages (to specify a page range). Valid page range entries would be...

  1-2

  1,3-5,15

  4-14,23

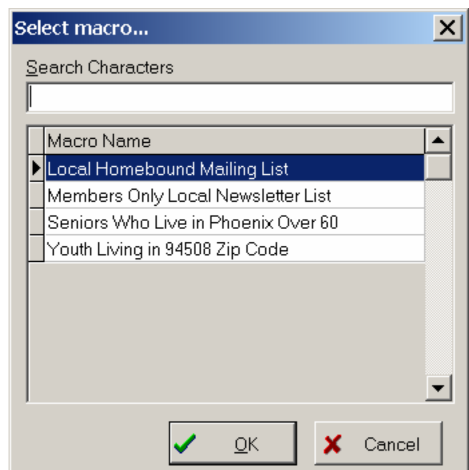
Macros



Macros “remember” selection and print control settings that can be recalled instantly when needed. All settings on the Selection page except for Attendance, Dates, and Visitation are available for recall, and all major parameters except for Attendance Grid can be recalled on the Print Control page.

Macros make it easy to store complex selections so that you don’t have to re-create it again the next time you need to print the same list.

To save a macro, first make all the selections you wish on the Selection page, then go to Print Control and adjust all the parameters you need there. Click **Save as Macro**, and when the **Save as Macro dialog** appears, either type in the name of a new macro and then click **Save New Macro**, or select a macro from the list on the dialog and click the **Update Selected Macro** button. You may also delete a macro from this dialog.



To retrieve a macro, click the **Get Macro** button on the Selection page, which is only enabled when the Field-Based Selections item is selected in the First Step Selection box in the upper left corner of the Selection page. Select the macro from the list, then click OK. If no additions or changes to the selections need to be made, go to Print Control and print your list.

Bulk Mailing Notes

US Postal Service regulations require specific sorting of your bulk mail whether or not you use bar codes. CMD provides direct, automatic sorting for bar coded and non-bar coded standard letters for bulk mailing. For specific mailing requirements, you’ll need to obtain a copy of the most recent rules and standards from your local post office.

Bar coded bulk mailings require the use of the 11 digit, Delivery Point Bar Code, and provide a modest cost savings over non-bar coded bulk mailings (generally 3 to 5 cents per piece). The specific sort required for each type of mailing is different, but CMD will do the hard work for you. Bar coded bulk mailings also require the presentation of a current (less than 180 days old) USPS CASS Certificate when the bulk mailing is brought to the post office. Software for Ministry provides this certification for its users for a discounted rate.

To prepare a non-bar coded mailing:

1. Select Mailing Labels as the Output Form, and select 2 or 3-up as the label selection (in the case of ink jet or laser printers).

2. Click the Bulk Mail Preparation button.

3. Set the Case Status to All Info Upper Case.

To prepare a bar coded bulk mailing:

1. Select Mailing Labels as the Output Form, and select 2-up as the label selection for ink jet or laser printer printing. **Note that you cannot use 3-up labels as there is not enough physical room on the label for the bar code**.

2. Check the Bulk Mail Preparation box, AND check the Use Post Net Bar Codes box.

3. Enter any SCF Zips needed for your area. These zips are the ones directly serviced by the Service Center Facility in your area which will actually process your bulk mail. Call your local post office for these zips if you do not know them. You'll enter only the first three digits. Names addressed to residences in the SCF zips will be printed first in a separate section so that you can easily separate them from the rest of the mailing, which is required when you submit your bulk mail. Click **OK**.

Once the label definition is finished, click the **Print button** and your list will be sorted for the bulk mail type you specified and then printing will begin.

On the label sheets, a special label will be printed at the beginning of each group of sorted labels telling you how to bundle the names following it. For example, if you have 27 names which are addressed to the same 5-digit zip code, the label will say something like "The following 27 names may be bundled together in a 'D' group." This will help you know exactly how to bundle or tray them together. Likewise, names belonging to "3" groups, groups of names where 10 or more share the same first three digits of a zip code, will be printed together. Finally, names leftover after the "D" and "3" groups are printed will be sorted into appropriate ADC and Mixed ADC groups (part of the new regulations). Make sure you label the bundles or trays according to the instructions you receive at the post office.

Names which cannot be sorted for bulk mail such as foreign addresses or names without sufficient zip code information will be printed in a separate section which will have to be mailed with **First Class postage**.

For more specific information on bulk mailing, or to find out how to get your names certified to meet the USPS requirements to use bar codes with your bulk mail, please contact Software for Ministry.

Note also that Software for Ministry does not guarantee to provide all forms, tray or bag labels, or other items for bar coded bulk mailings. You may have to obtain those items separately. We will make a good faith effort to stay current and provide forms and tray/bag labels as we are able, but we do not guarantee that we will provide them.

This page has intentionally been left blank. Use it for notes if you wish.

8
Attendance

The attendance marking and printing features described in this chapter are all accessible from the **Attendance Menu** option on the main menu.

CMD provides extremely flexible attendance tracking allowing you to record attendance for virtually any number or type of attendance events. Here are some example events:

- Regular worship services
- SS attendance
- Special worship events such as communion, Christmas programs, church anniversaries
- Outreach events such as Bible study events, cooking classes, parenting seminars
- Regular meetings such as board meetings, finance committee, board of elders

The list of attendance events is completely user-definable so that you can track attendance for *any* part of your church program, and you may define up to 300 different types of events.

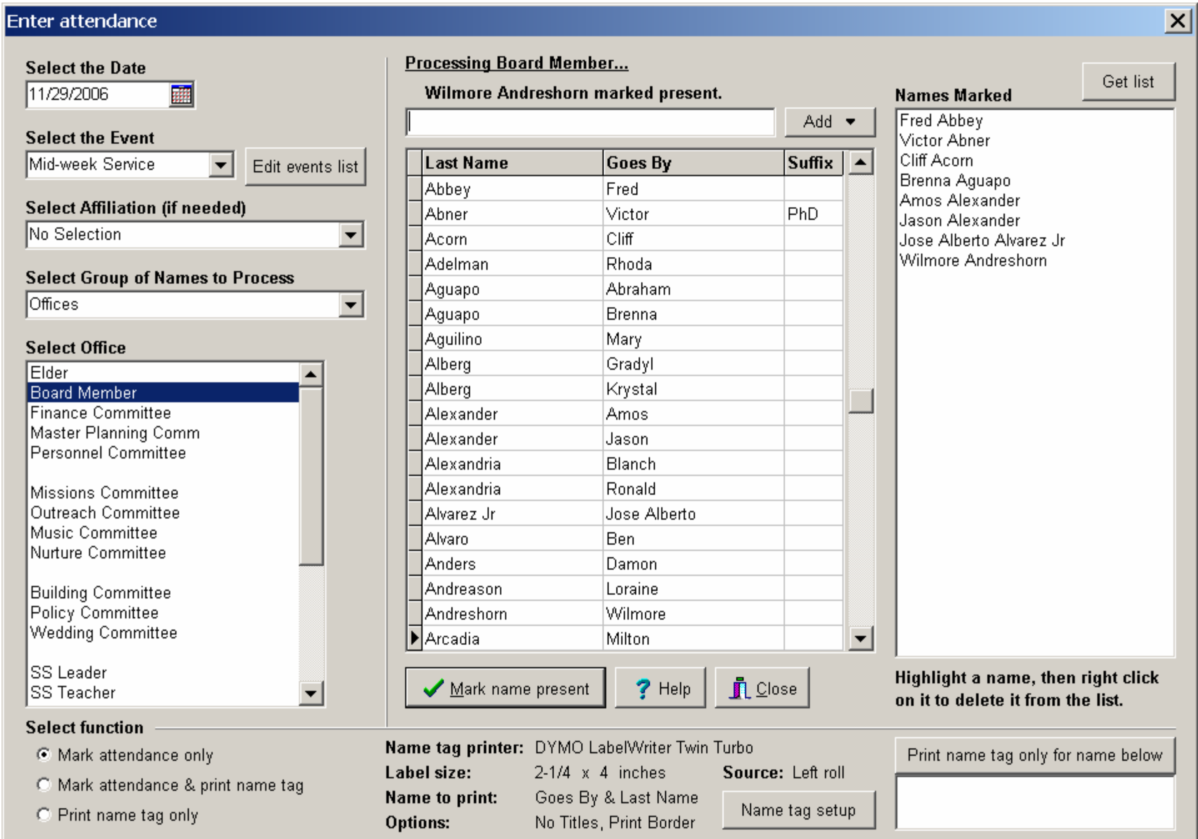
CMD can print attendance reports based on a number of criteria. You can print forms and grids to help gather and evaluate attendance. You can print a wide variety of lists based on attendance criteria including number absences, number of presents, attendance on a given date, or a specific event.

Tracking attendance is fast and easy, and is done using names you've already entered using the Enter/Modify/Delete Names dialog, or names that you need to enter "on-the-fly" with Quick Name Entry.

Note that if you only need to check or mark attendance for just one or a few individuals, you can use the **Individual Attendance dialog** available in Enter/Modify/Delete Names (see page 44). The instructions in this chapter assume that you need to mark attendance for more than just a few people, or for a specific group of people in your data file.

Marking Attendance

To mark attendance for any attendance event, select the **Attendance Menu | Enter Attendance** option on the main menu to access the **Enter Attendance dialog**. The dialog is divided into three columns to handle general attendance marking chores, plus there's a section along the bottom of the dialog to manage the printing of name tags/badges. A screen grab of Enter Attendance is shown at the top of the next page.



To mark attendance, follow these steps:

1 **Select the date** of the attendance event. You can either type in a date, or you can click the small calendar icon at the right edge of the date edit box to pick the date from a pop-up calendar.

2 **Select the Attendance Event**. If the event you need is not on the list of events, click the Edit Events List button just to the right of the Attendance Event combo. Make entries in the Events list as general as possible. The date selection will make each general event specific as you mark attendance.

3 **Select the Affiliation (if needed).** This will limit the names you see in the Names List to only those of the affiliation you select.

4 **Select the Names to Process**. If you wish to select from among All Names, you do not need to make any choice here because All Names is the default. However, if you'd like to select names from, for example, a specific SS Class/Division, then open the Select Group of Names to Process combo box and select SS Class/Division Names. Your list of SS Classes/Divisions will be displayed in the list just below the combo. Click on the SS Class/Division you wish to select from, and the list of names in the center column will be changed to display only those names in the SS Class/Division you selected.

The **Names to Process** choice is provided to help make the actual process of marking attendance faster. Only the names which match your Names to Process selection will be displayed in the drop-down list of names, thereby eliminating names from the list you wouldn't be marking anyway.

Once you've made the three selections above, you are ready to select the actual names that you wish to mark present.

To do this, click in the text edit box located directly above the Names List in the center column of the Enter Attendance dialog, and type in the first few letters of the last name of the individual you want to mark present.

There are three ways to mark a person present:

1 Highlight their name, then press Enter.

2 Highlight their name, then click the **Mark Name Present** button.

3 Double-click directly on the name.

Once a name has been marked present, you can continue searching for other names who also need to be marked present. Mark them using the same procedures outlined above. Close the dialog when you are finished entering all the attendance you need to.

If You Didn't Finish Marking Attendance for an Event

You do *not* need to mark all names present in one session. You can come back at any time later on and finish marking other names present for the same event.

If you need to return at some later point to finish marking attendance for an event, first set the date, event, and names to process list exactly as these items were set during the initial session and then click the **Get List** button in the upper right corner of the dialog. This will bring up all the names already marked for the event in the Names Marked column so that you'll know where to pick up in your attendance marking.

Removing a Name from the Names Marked List

If you find a name marked present who should not be, click directly on the name that should be removed in the Names Marked column with your mouse point, and then right-click on the name. A prompt will ask if you wish to delete the name. Click Yes, and then name will be removed from the attendance list for this date and event.

Name Tags

You can easily print name tags or badges from the Enter Attendance dialog using any of Dymo's LabelWriter™ printers. These inexpensive printers are available from a number of retail and on-line sources, and work directly with CMD. CMD's on-line help topic "Name Tag Printer & Form Information" provides specifics for the name tag stock that is available for use in printing the name tags along with some sources where they can be purchased.

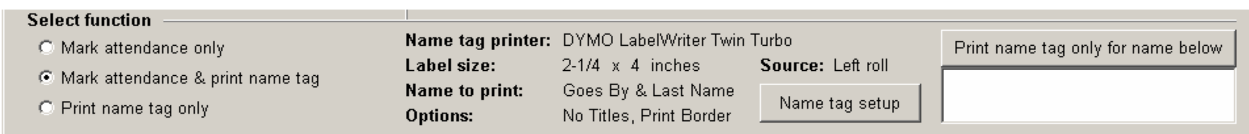
Special Note: Three of the name tag stock available for Dymo printers have adhesive backs, and one does not have adhesive. We make no guarantee nor shall we accept any responsibility for damage to clothing from the adhesive on the name tags. The responsibility to assure that the name tags will not damage the clothing of the wearer is strictly yours.

Using Name Tags Effectively

We’ve designed CMD’s name tag printing to work in concert with the marking of attendance so that they are printed efficiently and without fuss. The name tags themselves take about 2 seconds to print, so you can quickly generate name tags as people come to an event.

We suggest that you place a computer using CMD and the LabelWriter at the venue where the name tags are desired. As people come to the event, you can quickly find them on the Enter Attendance dialog. As you mark them present, a name tag will be automatically generated at the same time. No extra steps will be required. The work flow should go quite smoothly.

Here is a screen grab of the section of the bottom of the Enter Attendance dialog that deals with name tags:



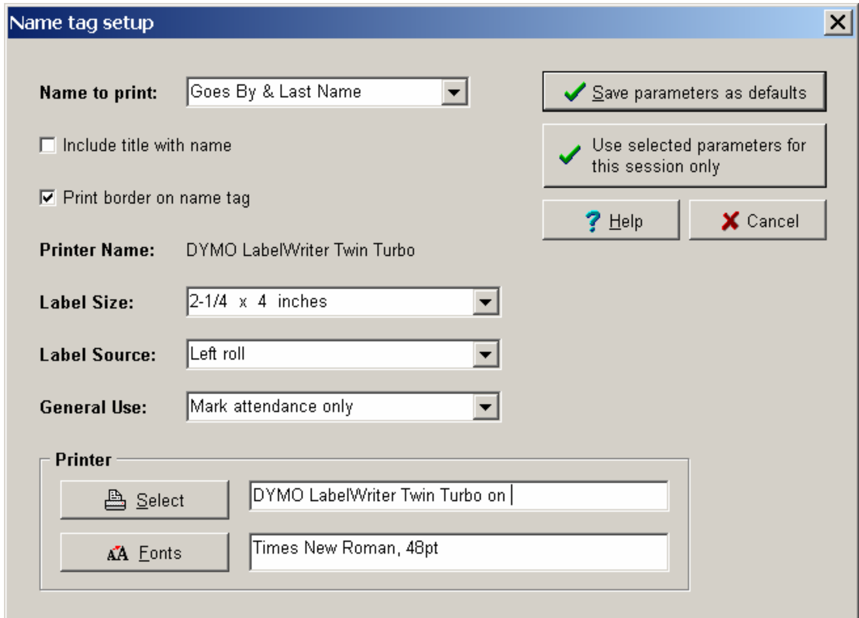
In the left column, there are three choices:

- **Mark Attendance Only** (no name tag will be printed)
- **Mark Attendance & Print Name Tag** (names are marked, and a name tag is printed)
- **Print Name Tag Only** (no attendance is marked)

Make sure that you check the choice that’s appropriate for your attendance marking session *before* you begin marking attendance!

The center column of information displays most of the parameters currently set for printing name tags. To view or modify the parameters, click the **Name Tag Setup** button (shown on the next page). The list of parameters you can adjust on the Name Tag Setup dialog include:

- **Names to Print**. Select from Goes By & Last Name, First Name & Last Name, Goes By Only, or First Name Only.
- **Include Title With Name**. Check this box only if you want the title saved in the name’s record to be printed with their name.
- **Print Border on Name Tag**. Check this box if you wish to have CMD print a border around the edge of the name tag. The tags are plain white, so you might prefer the look the border provides.
- **Printer Name**. This is just for display purposes. The actual Dymo printer is selected using CMD’s standard Printer Selection tool at the bottom of this dialog.



- **Label Size**. There are three sizes and four forms that CMD is programmed to print on for name tags. The on-line help topic gives you the specifics on the model numbers to order depending on your needs. They are all within a small measurement of being the same size, but there are three different sizes available. We've hidden the model numbers from you (because some of the forms you might order are from 3rd party suppliers—often less expensive—so we have chosen to simplify the selection using the dimensions of the name tags. **You must make the correct selection here, however, or the printing of the name will not be properly centered on the name tag**.
- **Label Source**. This parameter is included because Dymo makes a couple of dual-label printers. If you select, for example, the Turbo 400 printer, leave this setting on Automatic. However, if you purchase the Twin Turbo, you will need to tell CMD which roll is the name tag form.
- **General Use**. This selection determines which of the three following selections is the default selection whenever you first come to the Enter Attendance Dialog: Mark Attendance Only, Mark Attendance & Print Name Tag, and Print Name Tag Only.
- **Select Printer**. You'll need to click the Select Printer button to find the Dymo LabelWriter on your list of printers. Because there are several models available, CMD won't know what printer is the one to be used for printing the name tags unless you specifically tell it.
- **Select Font**. You are free to choose whatever font you wish for the name tags. Our testing was done using Times New Roman, 48 pt, Bold. We suggest that you start there and make changes as necessary based on some experience printing name tags.

  Special Note: We have programmed CMD to **automatically reduce the font size** when a name will not fit properly within the label boundaries. It will use the largest font size available when this adjustment is needed.

- **Save Options**. Select Save Parameters as Defaults when you have set the items as you will generally use them. Click **Use Selected Parameters for This Session Only** if your settings are meant to be temporary and that you'll only need them to be the way they are now set for just this session.

Print a Name Tag for a Name Not in Your CMD File

If you need to print a name tag for a person who is not in your CMD file, you can type in their name in the edit box in the lower right corner of the Enter Attendance dialog and then click the **Print Name Tag for Only the Name Below** button. No attendance will be affected since the name's not in your CMD file, but the name tag for the name will be printed using the current parameters.

Visitor Attendance

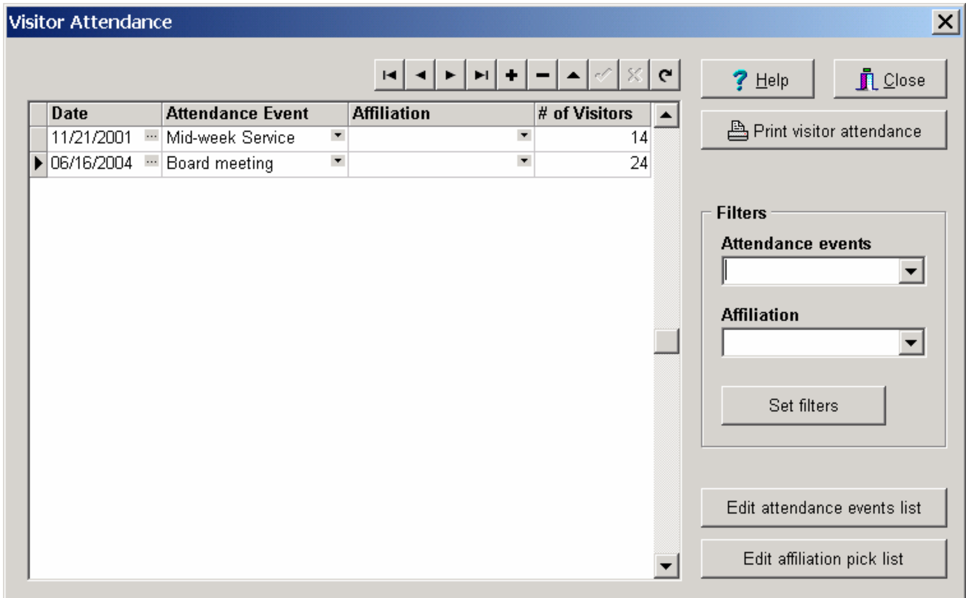
CMD allows you to track the total number of visitors attending, though not the specific names of visitors. If you have regular visitors for whom you wish to track attendance, enter such names into your CMD data file, and use the Membership Status field to mark them Non-Member Attenders, or some similar designation. This allows you to track attendance, send newsletters, track important dates, etc, and still keep your members separate from visitors. Note that you can specify Affiliation if you wish to track visitor attendance for each church in your district (or for each service if you use Affiliation to track regular attenders of a specific worship service in your church).

To enter visitor attendance, select the **Attendance Menu | Visitor Attendance** option. The **Visitor Attendance dialog** (shown on the next page) displays a grid that you can use to view or enter visitor attendance for any attendance event.

To enter a new event, click the + button on the navigation bar. A new line in the grid will appear from which you can select the date, event, affiliation, and number of visitors present. Click the check mark icon on the navigation bar to save your entry.

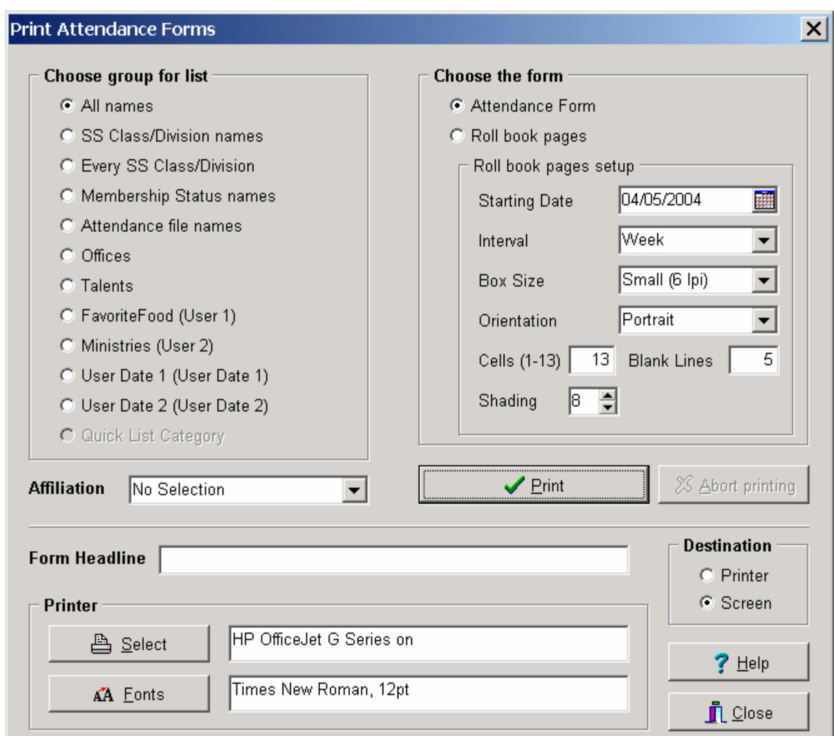
You may wish to make use of the filter options to set the grid to display only attendance items like the one you are entering so that you can make sure you are making a duplicate entry.

You may also print visitor attendance reports by clicking the **Print Visitor Attendance** button. The print dialog that appears will allow you to filter the list and select a date range for the events to be included in the report.



The Visitor Attendance dialog, above, allows you to enter the total number of visitors at any attendance event, and print a tally of visitor attendance.

Print Attendance Forms



To print one of two available forms to help in the gathering of attendance, select the **Attendance Menu | Print Forms** option. You'll work from the dialog pictured here to the right.

With the controls here, you can print attendance forms for several different groups of people in your file, and you may also specify an Affiliation if you wish to print attendance for a specific church in your district. There are two types of attendance forms:

- **Attendance Form**: This form is a simple form which prints a person's name with a small blank line beside it where a check mark may be placed if they are found to be in attendance.

- **Roll Book Pages**: This form prints a grid-like form on your page with slots to record up to 20 weeks of attendance information.

  Before you begin printing, make sure you select the starting date, the interval, box size, and orientation. You'll likely need to experiment some to get the grid just as you want it with the options presented.

  This form is most useful for creating notebook pages of attendance forms which can be printed and then given to SS Class/Division leaders to track attendance.

Print Attendance Totals

This Attendance Menu option allows you to print a summary page of your attendance.

Archiving Attendance

Currently CMD does not provide an archive for attendance files. However, this feature will be added in the future as the need arises. As is, CMD's attendance tracker is able to store some 2 billion attendance markings, which means that you can store and view attendance over a number of years if you wish. However, if this begins to compromise performance, we may elect to implement an archival process that will remove old attendance from your active file.

Printing Names by Attendance

You may print lists of names, including an attendance grid of attendance by using the capabilities available in **Print Names**. Among your options there, you may print names based on number of time present, names present on a given day, and more. We've chosen to use the expansive capabilities of Print Names to print names by attendance or to print attendance grids since you can utilize all the additional features while doing so.

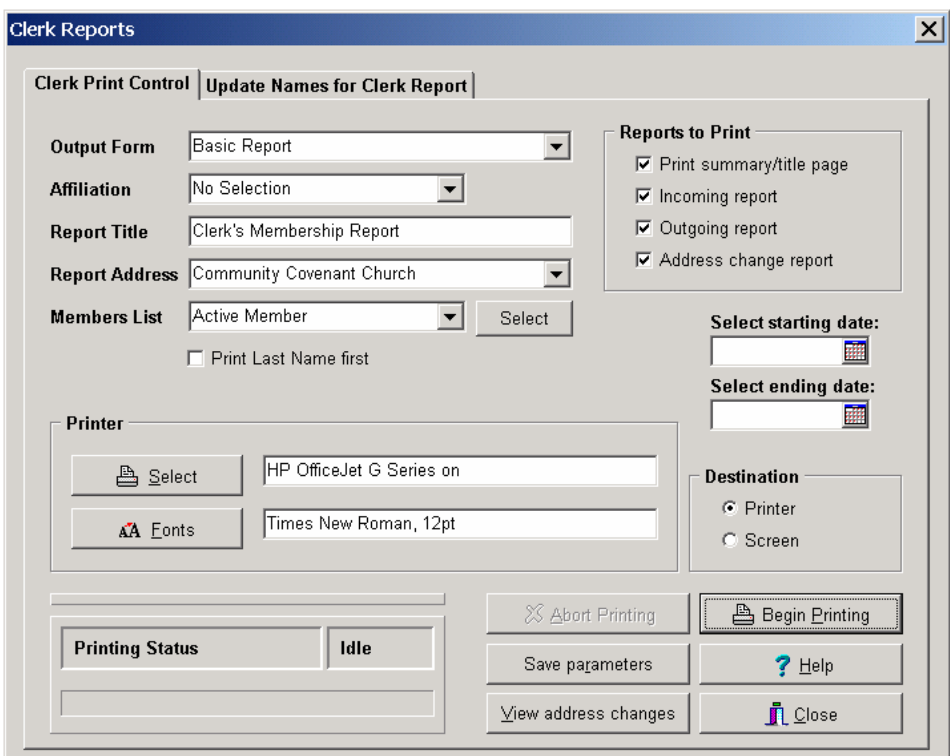
Because of the number of options available, we'll not duplicate here the information about printing that you can find in Chapter 7. Just remember that you may include attendance information as the criteria for the list which will be generated.

9
Clerk

CMD provides **Clerk** functions to facilitate reports that may be required by denominational entities, local operating boards, or the pastoral staff. Clerk information is drawn from several fields already present in the CMD's data structure, and from two additional data files:

- The **Archive File**, which stores information about those names who have been deleted from your data file
- The **Address Change File**, which stores prior address information before a change was made to a given family's address or phone number.

The **Clerk Menu** provides access to these two data files, plus the means to print the actual clerk's report. A clerk's report is defined as a report of members who have joined or who have been removed from your official membership list during a specific time period. Also included is a report of name or address changes of members.



We'll begin our discussion with the clerk's reporting features, selected when you pick the **Clerk Reports** option on the **Clerk Menu**. A screen grab of this dialog appears at right showing the **Clerk Print Control** tab page selected.

All the tools needed to control printing your clerk reports are there. There is even an update page on this dialog that you can use to make quick updates to clerk-related information as needed. Otherwise, since you use the information stored in your CMD data file, Archive file, and Address Change file, all that is needed here are the printing functions.

Members List Definition

Before you attempt to print any clerk's reports, you *must* specify the Members List. This list is taken from the items you have defined on your Membership Status list that represent actual members. **If you do not do this, the reports will be empty and/or completely inaccurate!**

To define the Members, list, click the Select button to the right of the Members List drop-down box. Select only those items that define actual members in your data file.

Output Forms

To view the available **Output Forms**, click the small down arrow icon at the right end of the Output Forms combo box to reveal the options. Choose from among:

- **Basic Report**. This option prints a basic report incorporating name, address, and appropriate joining or archive date information. When you select this option, you can select any or all of the items on the Reports to Print group just to its right. Incoming Name reports are taken from the active names in your CMD data file, Outgoing reports come from the Archive file, and the Address Change Report comes from the Address Change file.
- **Abbreviated Report**. Similar to the Basic Report, except that address information is not printed on the Incoming and Outgoing reports. When you select this option, you can select any or all of the items on the Reports to Print group just to its right.
- **Denominational Report**. This report is printed landscape on your page, and includes all the reports which can be printed automatically. Since all the reports are included, the options on the Reports to Print group are disabled when the Denominational Report is selected.

  Note: If your denomination uses a different form for reporting, please send us a copy of the form and we will endeavor to include a form similar to the one you need in a future update.
- **Incoming Name Preview**. This form prints a basic list so that you can review your incoming names to make sure that you have the required information stored for them in order to be properly included in the clerk report. See page 42 for more information on storing information for clerk reports.

Affiliation Selection

If you are in a multi-church district and you have used the Affiliation field to differentiate members of the different churches in your district, you should select the Affiliation from the drop-down combo box provided which matches the specific church for which this report is intended. If you don't select an Affiliation, then all names in your entire district will be in the report.

Report Title

Use this edit box to enter a title that will appear as the clerk report header.

Return Address

This selection picks which church name from the return address list already entered into your data file that will be used in the report header information.

Members List

As mentioned on page 90, you *must* let CMD know which items from your Membership Status list represent actual members. If the drop-down box doesn't reflect your list of members, click the Select button to see your Membership Status list so that you can define an accurate list. **Your clerk's reports are guaranteed to be incorrect if you do not set up the Members List properly!**

Print Last Names First

Check this box if you wish to print the last name first when the reports are printed.

Reports to Print

This group of check boxes determines which of the possible reports are included if your clerk report is either a Basic Report or Abbreviated Report. Make sure the items are checked that you wish to include in the clerk report. If the items are grayed-out, you cannot select or deselect them.

Starting/Ending Dates

Select dates by clicking the small calendar icon to the right of the start and ending date boxes. Clerk reports can cover any time period you specify.

Note that while you can specify any date range for the report, generally you should only attempt to print reports for date ranges that are after the time when you starting recording each and every incoming and outgoing member in CMD. The clerk function is designed to accurately print ***current*** reports, not reports that go back in time because you will not have entered all the information needed to generate an accurate report!

View Address Changes

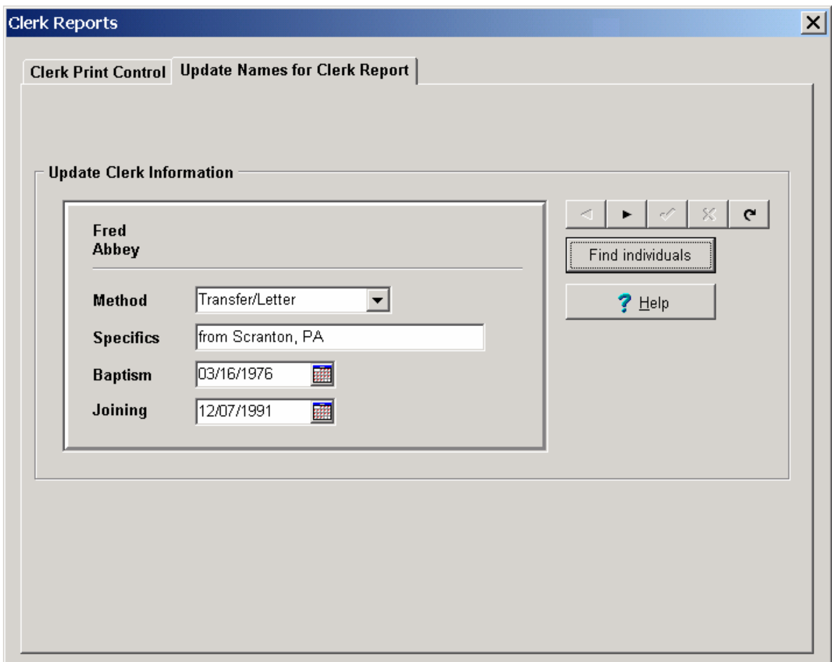
If you need to review or delete some of the address changes made during the time period you specified, click the **View Address Changes** button. See page 93 for more information on address changes.

Print the Report

Once all the parameters are set the way you like and you've reviewed your data as needed, click the Begin Printing button to actually print the report.

Update Names for Clerk Report

If you need to update some information quickly for your clerk reports, you do not need to leave the Clerk dialog and go to the Enter/Modify/Delete Names dialog to do it. Instead, click the **Update Name for Clerk Report** tab page. This page has tools which allow you to alter the Method, Specifics, Baptism, and Joining Dates. Access the name(s) you need to update by clicking the **Find Individuals** button.



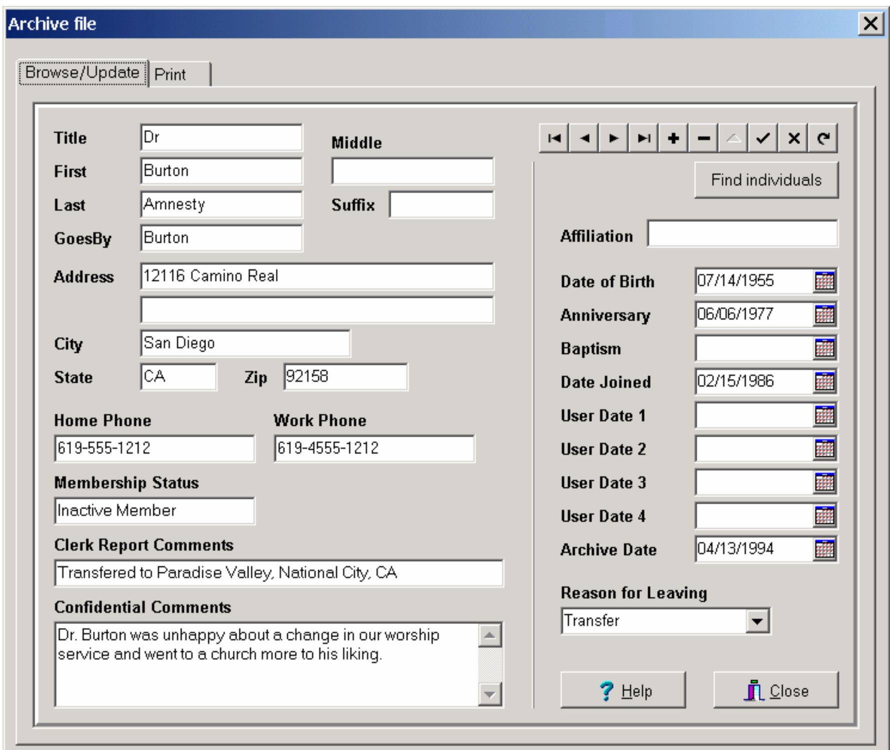
Printing Accurate Clerk Reports

The reports you print will only be as accurate as the information you've entered. It is not hard to print an accurate report, but there are some things which will help assure that your reports will be meaningful.

We've included a fairly complete help topic in CMD help file which you should access, print, and read. To find it, click the **Help Button** on the Clerk Print Control dialog, and click the **Printing Accurate Clerk Reports** link.

Archive File

The data in the Archive file constitutes a permanent record of names removed from your membership list. The **Archive File dialog**, accessible as a choice on the Clerk Menu, gives you access to the names stored in your Archive file. The Archive File dialog has pages that let you browse, update, or delete names in the Archive file, and to print them. See Chapter 6 for information on how to view, print, and remove names from the archive file.



Address Change File

The **View Address Change File dialog**, accessible as a choice on the Clerk Menu, displays all the names which have been saved to your address change file. You may also call up the Address Change File dialog by clicking the **View Address Changes** button on the Clerk dialog.

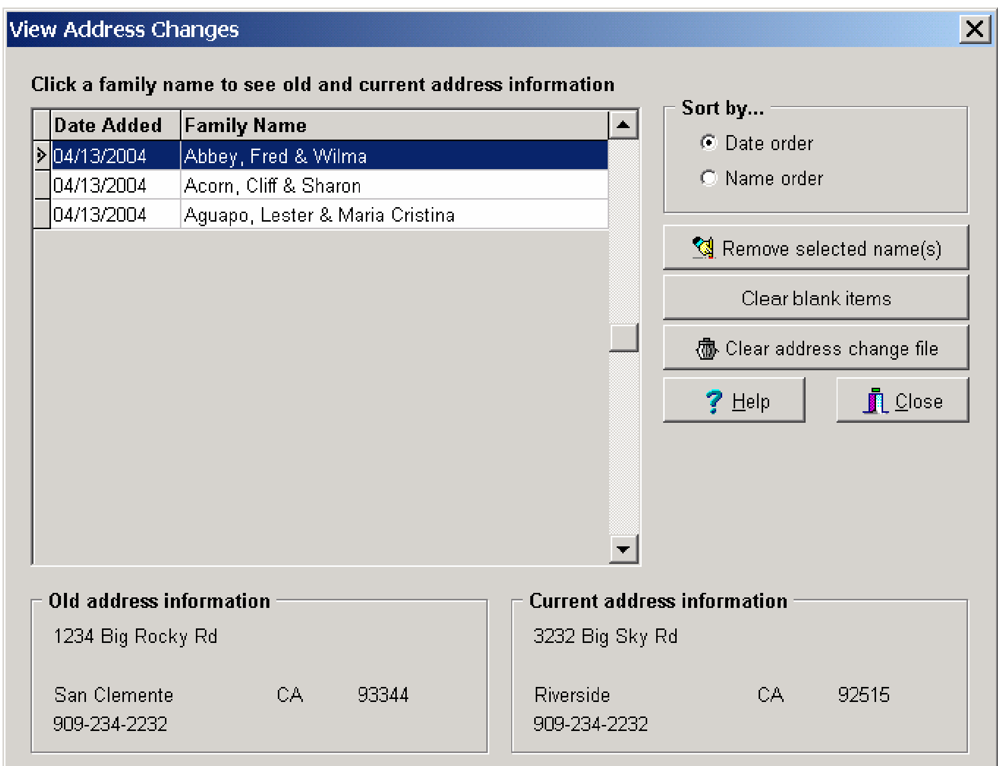
Names whose addresses have been changed are automatically sent to the Address Changes data file only if you check the Track Address Changes check box on the Settings page of the Address notebook located in the Family Data area of the Enter/Modify/Delete Names dialog.

You can also set a default for this field for each new family entered by selecting the Track Address Change box on the **Check Box Defaults page** of the General Preferences dialog.

The address change file's main purpose is to hold address changes of your names so that these changes can be included in your **Clerk Reports**. Once the clerk report has been printed during the time period covered by the names in your address change file, we recommend that you clear all the names out of the address change file with the button provided.

There is also an option on this utility to clear out individual names if needed. Click on the name(s) you wish to delete and click the **Remove Selected Name(s)** button. If you wish to select more than one name for deletion, hold the Ctrl key down while you make your selections.

Note that you can also **Clear Blank Items** to remove any blank entries in the address change file, and you may click **Clear Address Change File** to erase all items in the file.



10
Quick List

What is Quick List?

Quick List is a feature unique to CMD which allows you to quickly create new **Quick List Categories** that you link to names in your CMD data file for the purpose of printing labels, lists, or reports.

What is a Quick List Category?

When entering names into the CMD data file, you enter information into "fields" that contain the information. Family Name, First Name, Birth Date are all examples of data fields. These fields are programmed into CMD and cannot be changed, though some can be renamed and you can define the choices that you pick from in nearly all of CMD's menu fields.

By contrast, in Quick List you work with "categories." Think of categories as new fields that are stored in a completely separate data file. You can create any sort of category you wish and associate any number of individual names in your CMD data file with any category. You can also remove any name or names from any category at any time. *Any activity in the Quick List file makes no changes in the CMD's data file*.

How is This Useful?

Quick Lists can solve a number of problems for you. Here are a few examples:

- **Temporary Lists**. You need to create a small mailing list from among your names that you will use only a few times and would rather not take up one of the other fields to indicate names who should be included. You can quickly add the names in your data file to a new Quick List for temporary use, and then you can delete the entire Quick List category in a single operation.
- **New Lists**. Perhaps you need to track some things that the fields pre-programmed into CMD do not cover. You can create any number of new categories and assign any number of people to them. For example, let's say that you want to keep track of members in your church who have an interest in forming a church softball team. A Quick List category is an ideal way to keep track of those names.
- **Frequently Changing Lists**. If a particular list is a regularly used one but requires constant or frequent changes, updating the names in a Quick List is often faster and simpler than call-

ing up each name in Enter/Modify/Delete Names and updating the specific field for each name.

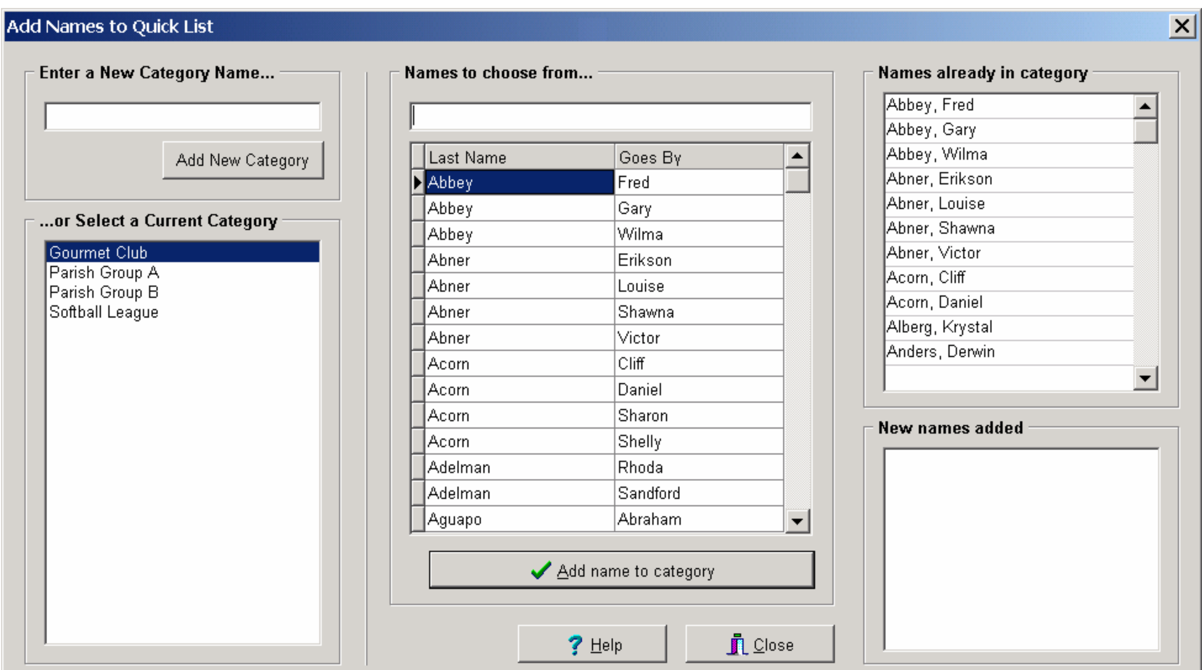
There are many other possible uses, but these should get you started thinking in the right direction. Because Quick List categories can be created, updated, and deleted *all without bothering the data in your main data file*, you should feel free to experiment with Quick List so that you can learn how to use it when the need arises.

Printing Reports

To print reports based on a Quick List, select Quick List Category in the First Step Selection box on the Selection page of the Print Names dialog. See page 57 for more information. All other options for printing names that are available for any other selection of names on the Print Control page are available for the printing or viewing of Quick Lists.

Add or Update a Quick List

To create a new Quick List category or add names to one that already exists, select the Add Names/Categories option on the Quick List Menu. This will bring up the Add Names to Quick List dialog:



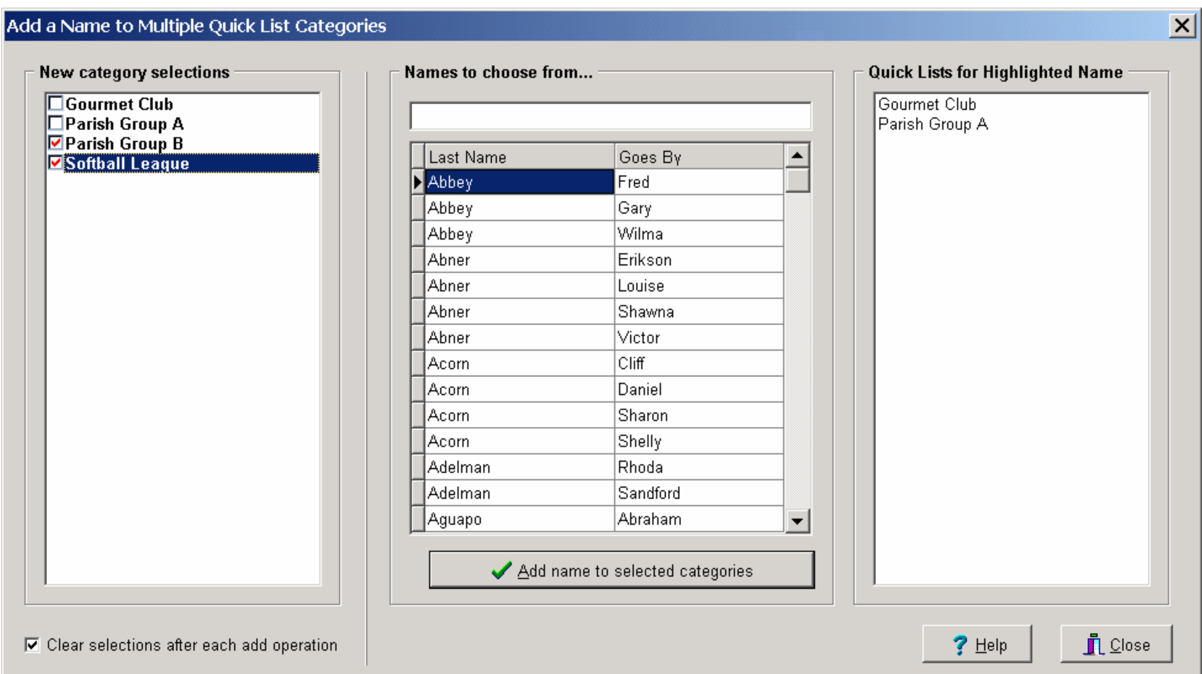
To create a brand new category, click in the **Enter a New Category Name** edit box in the upper left corner of the dialog. You can enter any title you wish up to 30 characters in length. Click the **Add New Category button** when you have finished entering the new category name. It will immediately be added to the list of current categories just underneath.

If you wish to add names to a category already created, click on it (make sure it's highlighted) in the list of current categories. The names already in the category will be displayed in the column on the far right side of the dialog.

To add names to the selected category, click in the edit box in the center portion of the dialog. Type in the first few letters of the last name. As with other parts of CMD, once the name is highlighted that you wish to add, either press Enter, click the Add Name to Category button, or double-click on the name. You will see a listing of new names added in the current session in the lower right corner of the dialog. Continue entering names as needed into the category until you are finished.

Add Names to Multiple Categories

If you use Quick List often, you might encounter some times when you wish to add a name to more than one category. You can do this using the **Add Names to Multiple Categories** option on the Quick List Menu. You'll see this dialog:



When you arrive at this dialog, you'll see a list of categories on the left column with a check box beside each one. Check the box of each category for which you wish to add a name.

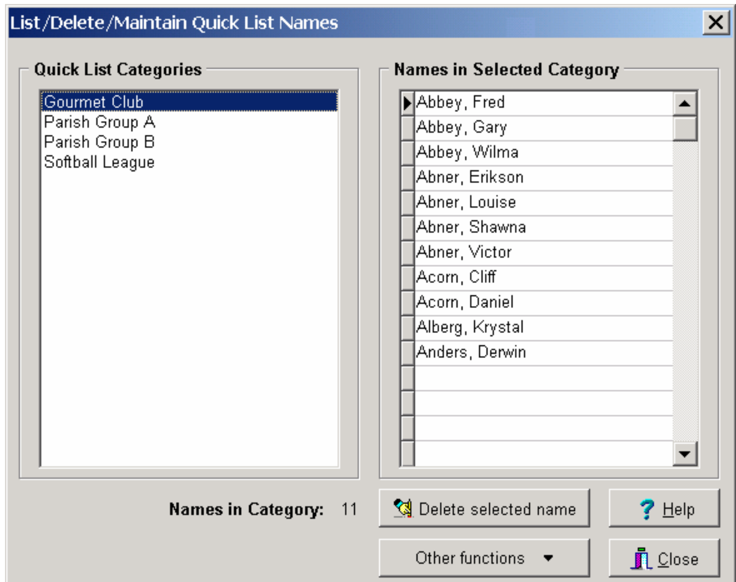
A check box in the lower left corner of the dialog will allow you to either keep or clear the New Category Selections after selecting each name in case you need to either add several names to the same set of multiple categories, or if you need to add different names to different categories.

List/Delete/Maintain Names & Categories

Select this option on the Quick List Menu if you need to remove a name from a category, view the names in a category, erase an entire category, rename it, or replicate it using another name.

If you just wish to **view the list of names** in a category, click on it. The list of names that belong to the selected category will be displayed in the column on the right side of the dialog.

To remove a name from a category, click on the category on the left which will display the list of names in the category on the right. Highlight the name you wish to remove, then click the Delete Selected Name button. **Remember, this action only removes the name from the Quick List that you've highlighted. It does not remove the name from your CMD data file!**



If you wish to **erase an entire category**, rename it, or replicate it, first highlight the category then click the **Other Functions button**. Select the function you wish to perform.

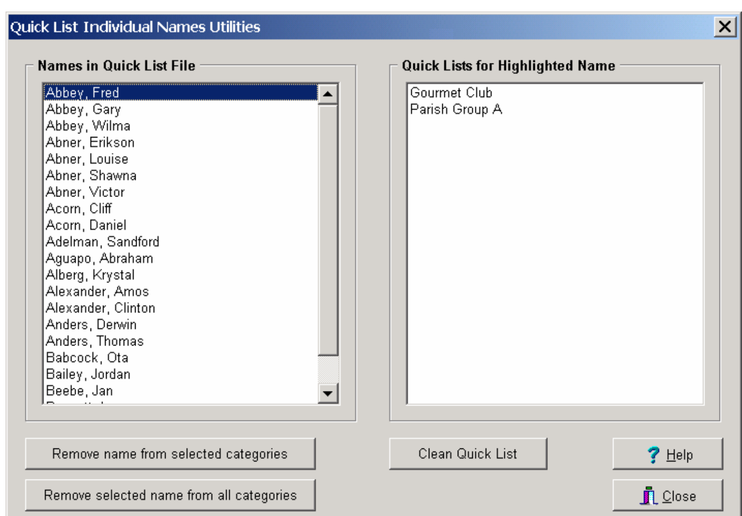
Individual Name Utilities

The Individual Name Utilities selection on the Quick List Menu allows you to either remove a selected name from a group of categories that you can select, or remove the name from all categories in a single operation.

To use it, find and highlight the name that you wish to work on. Once a name is highlighted, all the categories that the name is in will be displayed in the column on the right side of the dialog.

If you wish to remove the name from selected categories, select them then click the button to remove the name.

If you wish to remove the name from all categories, no selections in the right hand column will be necessary.



Clearing Out the Entire Quick List

If you need to clear out the entire Quick List data file, you can do it in one easy step by using the Clear command on the Data File Utilities dialog.

Make sure that you really intend to clear out all data from ALL Quick List categories! There is no "undo" for this.

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11
Christian Learning

To access the Christian Learning dialog, click the **Christian Learning** item on the **Tools Menu**.

Christian Learning allows you to track the progress of individuals through various learning experiences. Though primarily designed to track progress of people learning about the Christian faith, its potential application is much wider. It can be used to track participation in virtually *any* sort of learning experience for an individual or group such as elders' training, health or parenting classes, Bible studies, home Bible group studies, and much more.

Each learning experience has a related set of user-determined **topics**. For each topic there are fields that record the topic name, a teacher, the date the topic was presented, and the learner's response to the presented topic.

You may use Christian Learning in a number of different ways to make it relevant for different types of learning experiences and your way to doing things. Experimenting with "CL" before you use it in earnest will probably save you some time later on, and it will likely open up some concepts for you that will be useful as you begin to use it. We've even provided an easy way to clear out any practice data when you are ready to use Christian Learning for a real situation.

There are five tabbed pages on the Christian Learning dialog:

- **By Name**. This page is used when you wish to view or update the learning information for one or a few individuals. From here you can also print a record of any individual's learning experiences.
- **By Experience**. Use the tools on this page when you wish to update the information for a larger number of individuals for a particular learning experience. From here, for example, you can quickly update the attendance for a given topic for any number of names in your CMD data file.
- **By Roster**. This page is used to mark attendance for a given topic for a pre-defined group of individuals in your data file. An example of this would be if you were going to give a series of training classes on being a deacon. The names that would appear on your screen from which to mark attendance or a response for this training course would be only deacons.
- **Define Experiences**. This page is used to set up the actual learning experiences, the possible responses, and the topics associated with the learning experience.
- **Print Reports**. This page provides tools to print various lists and reports based on the learning experiences you define.

Define Experiences

Because you have to define specific learning experiences before you can do anything else with CL, we'll start with the **Define Experiences** page that looks like figure 11.1 below. For illustrations purposes, we'll refer to a sample learning experience that we have created called **Christian Basics**. It is designed to be a very basic set of Bible study lessons for a person just learning about the Christian faith.

Learning Experiences Grid

In the upper left corner of the dialog, you'll see a small navigation bar over a small grid labeled **Learning Experiences**. This grid displays a list of all currently defined learning experiences. You may scroll the list to see other learning experiences if you have defined more than the 6 entries the grid can display without scrolling.

Adding a New Learning Experience

To add a new learning experience, or "LE", click the + button on the navigation bar located over the Learning Experiences grid. This will open up a space in the grid for a new learning experience. Enter up to 30 characters for the name of the learning experience.

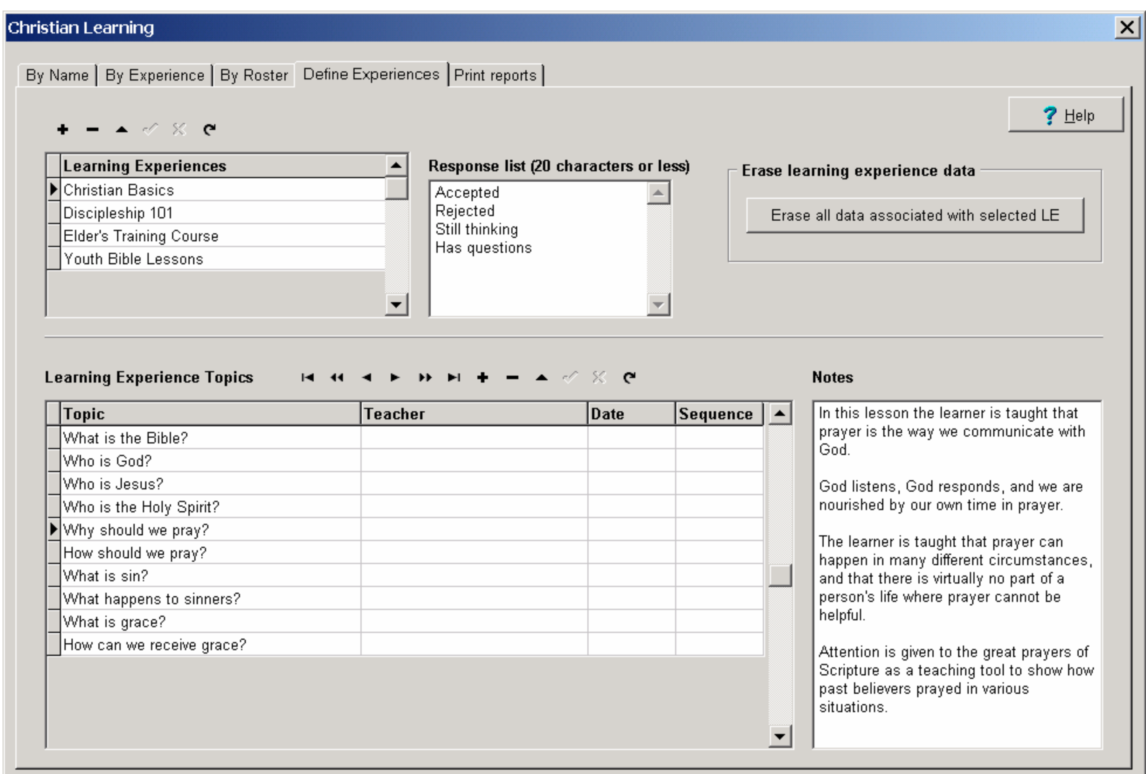

Figure 11.1: The Christian Learning dialog showing the Define Experiences page. Along with 3 other learning experiences, we've set up an experience entitled Christian Basics that we'll use as an example as we work through the various processes available to help you track individuals on their learning course.

Responses

Along with each learning experience, you may define a list of potential **responses** that are appropriate for the type of learning experience that you are defining. Click directly in the Responses field to enter or modify responses. In our example, we needed responses to indicate how a person might respond to the various Biblical topics that would be presented. Some learning experiences may need nothing more than responses such as Present and Absent so that the response essentially becomes an attendance marker. Use the response list any way that meets your needs.

Adding Topics

Learning Experience Topics track the **specific topics** that are to be associated with a given learning experience. You may define as many different topics as you need, and the list may be expanded later as needed. To add a topic, click the + button on the navigation bar over the Learning Experience Topics grid. When you define a topic, you may provide a topic name, a teacher or presenter, a date when the topic is to be presented, and a sequence number to assure the flow of topics presented stays in a desired order.

Some learning experiences are static, meaning they have a defined beginning and ending date with specific study topics predetermined. Others will be more open-ended; that is, perhaps the topics are mapped out ahead of time, but the teachers or presenters may not be consistent, nor the dates determined ahead of time.

In our example, we're designing this learning experience to be made available to individuals who will learn about Bible truths with a pastor or church member who knows how to help someone study the Bible. Because the Christian Basics course will be given one-on-one, we won't know the name of the teacher or the date because those items will be worked out over time with the teacher and the student. Other settings, such as a one-week course on how to be a good church elder, might already have the teacher and dates mapped out. If that's the case, enter that information when you define the topics.

Topic Notes

Located just to the right of the topics grid is a notes area. When defining a topic, you may wish to click in the notes area with your mouse pointer and type in some reminders, a basic outline for the topic, or anything else useful to you that will be associated with the selected topic. In our example, you can see that the "Why Should We Pray" topic is selected, and you can see the notes for that topic displayed to the right.

Though the notes area is small in size, it can actually hold up to 64K of text (though formatting is limited) so you can put in enough notes to allow you to present the selected topic right from these notes if you wish.

Deleting a Learning Experience or Topic

You may delete a specific topic from a specific learning experience by selecting both the learning experience and the topic. Click the – button on the topic's navigation bar.

If you wish to delete an entire learning experience, select it in the Learning Experiences grid and click the small – button in the navigation bar over the Learning Experiences grid.

Editing a Current Learning Experience

To work with an already-defined learning experience, click directly on it as is shown in our example where Christian Basics has already been selected. You can then edit Responses or topics as needed.

Erase All Data Associated with Selected LE

If you no longer need any data associated with the selected learning experience, click this button. This will not remove the LE from the list of learning experiences, but it will delete any trace of the selected LE from the data files of names in your CMD file.

By Name

The By Name tab page provides tools to view, edit, and print CL information for specific individuals in your file. If you need to edit a whole batch of names, the By Experience or By Roster pages might be better choices. But if you need to work with one or just a few individuals, the By Name page might work best. The blank By Name tab page looks like the screen grab in figure 11.2 below.

The layout of the By Name page provides name search tools in the upper left corner of the dialog, a grid for displaying topics associated with the selected name, a place to enter comments about the selected topic, controls to add or delete topics or learning experiences to the selected name, and options for printing the learning experiences for the selected individual. We'll stay with the sample learning experience mentioned above as we walk you through how you might use this page.

Let's assume that Fred Abbey, the first name in our sample list of names, wants to take the Christian Basics course of Bible studies. First, we'll open the combo box labeled Select Learning Experience located near the top center of the dialog.

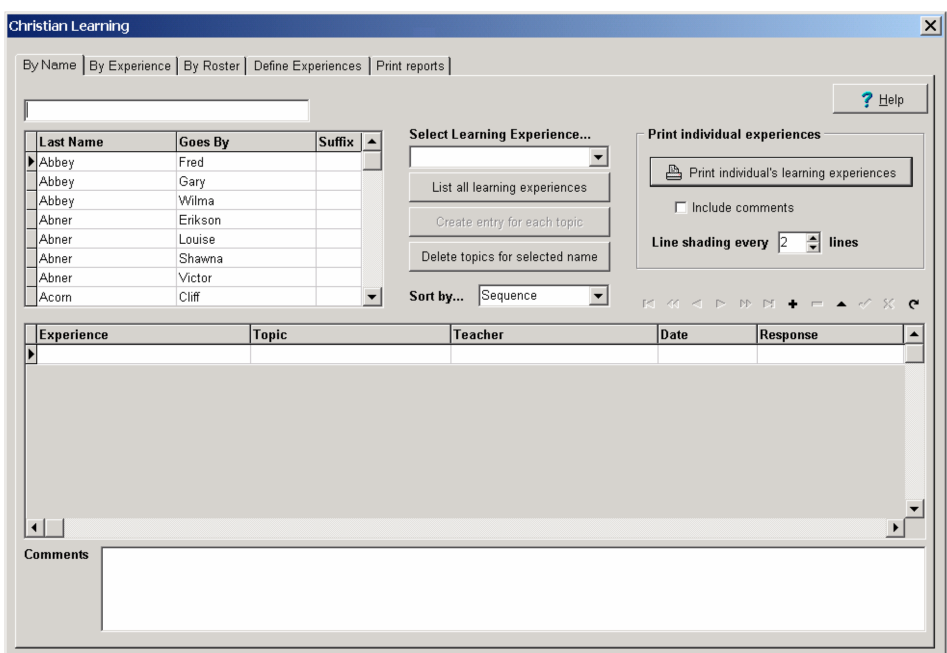

Figure 11.2: The screen grab to the right is of the By Name page where there are no learning experiences visible.

There are name search tools in the upper left corner, and a grid in the lower half of the page which shows any learning experiences assigned to the selected name.

When we open it, we'll see the list of all the learning experiences we've defined on the Define Experiences page (see figure 11.3). We'll select Christian Basics from the list, and then we'll click the Create Entry for Each Topic button also located in the center of the dialog. This will result in what is shown in figure 11.4.

Notice that all the topics created for Christian Basics have now been assigned to Fred Abbey with just one mouse click! As Fred completes a study, you can click the in Teacher, Date, and Response fields to record the appropriate information. As Fred progresses through the study, you'll be able to easily see the topics covered and yet to be covered.

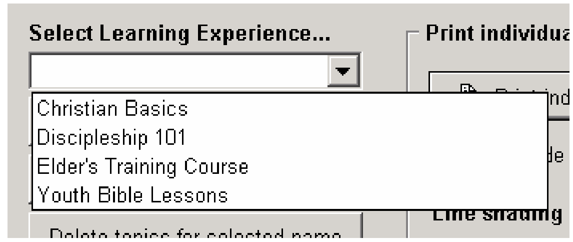

Figure 11.3: When you click the icon in the Select Learning Experience combo, the list of all currently defined learning experiences will be displayed. Use this selection to limit what's viewed in the grid to the selected learning experience, or when you want to quickly assign all the topics of a learning experience to a given name.

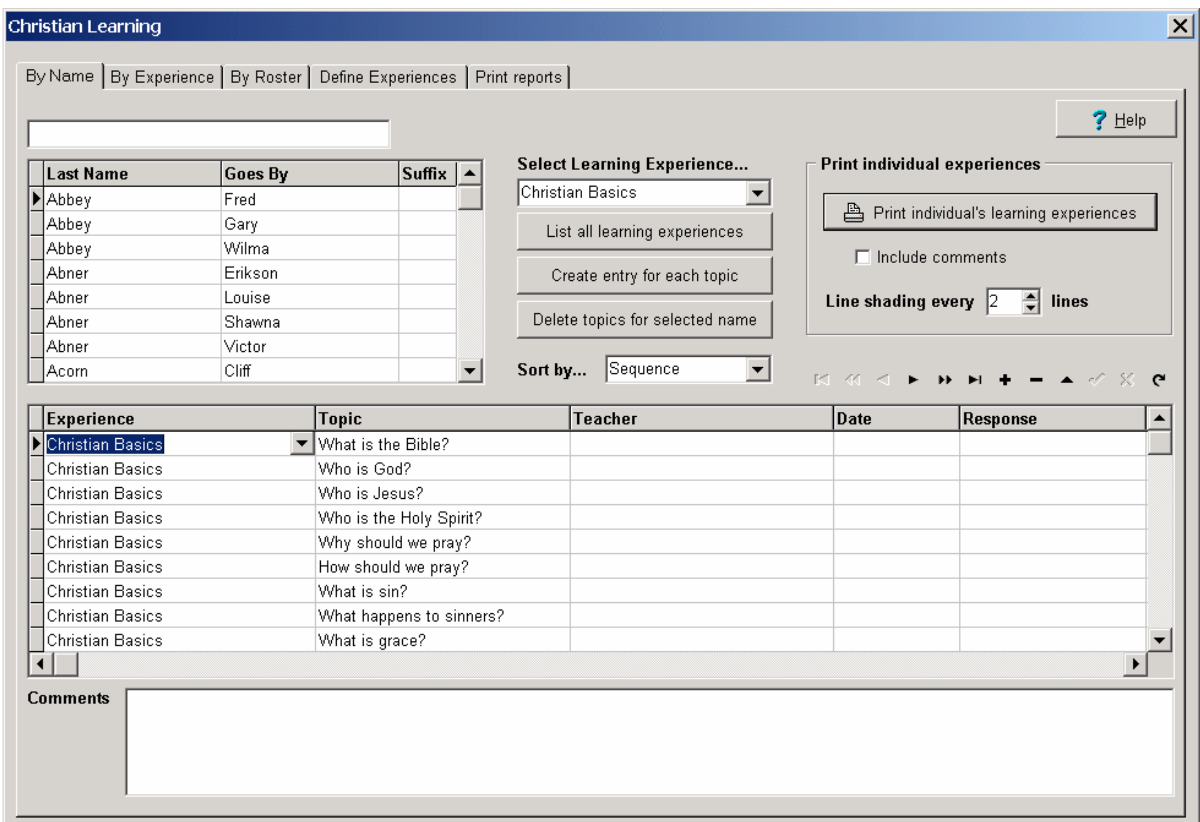

Figure 11.4: This is the By Name page after Christian Basics was selected as the learning experience, and after the Create Entry for Each Topic button was clicked. In one click, each of the topics defined for the selected learning experience is automatically assigned to the learning record of the selected name.

List All Learning Experiences Button

Because you can assign as many learning experiences as you wish to any number of individuals in your data file, there may be times when you wish to see all of a name's learning experiences on the grid at one time. To do this, click the **List All Learning Experiences** button.

List a Specific Learning Experience

If you wish to see only the topics associated with a specific learning experience, open the **Select Learning Experience** combo box and select the learning experience you wish to display.

Delete Topics for Selected Name Button

If you wish to delete topics for the selected name, click this button. If you have selected a particular learning experience, this delete function will only delete the topics associated with the selected learning experience.

Sort By Selection

You have four options here: Sequence, Date, Date Descending, and Teacher. Select as appropriate.

Print Individual's Learning Experience

If you wish to print a quick report of the learning experiences for the selected individual, click the **Print** button. You may adjust two parameters: you may include comments if you wish, and you may adjust the line shading increment.

The form that is printed will vary depending on whether or not you are showing all learning experiences, a specific one, or if you have selected comments.

If you need to adjust the **shading depth** of the shaded lines, double-click directly in the line shading edit box to get to the Preferences page that allows you to adjust this.

When you click the **Print** button, the report will be prepared, after which a small dialog will allow you to choose between preview (screen) or printer.

Additional Notes on the By Name Page

- You may add topics one at a time to any name's CL record by clicking the + button on the navigation bar over the topics grid. Select the topic from a drop-down list which becomes available when you are in that field.
- You may fill in the teacher, date, and response of an individual for any topic in any order that's needed. That means even though you may have defined an optimum sequence for the study to progress, reality may dictate a different order of presentation for one reason or another. You are not slave to the order in which topics are presented. Click as needed in the fields of the topics as needed. Figure 11.5 shows how we've recorded study dates for Fred, complete with various responses.

Notice that the date order of the topics covered is not in line with the sequence in which the topics are presented. Once again, that does not matter. What matters most is that you are able to see what topics have been covered and when they were covered, and what the response to the topic was.

- Use the comments field for a specific topic to record reactions, questions, or suggestions given by the learner. Some of the information you record here may become helpful or relevant as the learning experience progresses.
- If you manually enter a topic, the list of topics that are available, along with the list of responses that are available, are determined by the selection of the learning experience selected in the first field of the topics grid.

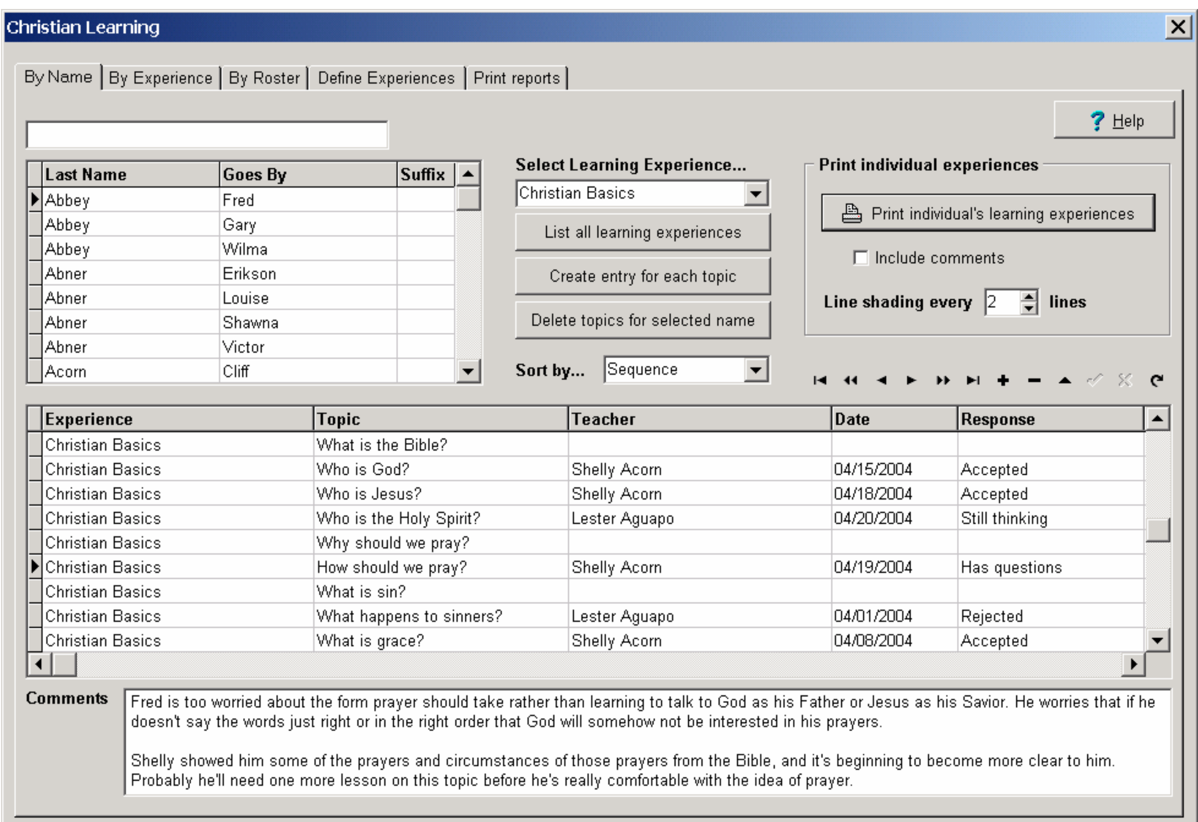

Figure 11.5: This screen shot shows the topics grid with several of the topics completed. Note that the topics may be filled in out of sequence or date order as needed. The sequence is only there to provide an ideal flow of the topics, but need not dictate the actual order of presentation.

By Experience

The **By Experience** page allows you to enter information about a learning experience to a large number of names more quickly than you could if you worked with the By Name page. This page is most useful for those occasions where the list of persons who attend a learning experience is not easily predictable and may well change over the course of the learning experience.

An example of this might be a public evangelism setting where a speaker comes in for several meetings over the course of days or weeks. Those who might attend such meetings may be there for only a few of the meetings, while others may come for many or most of them. Still others will begin attending sometime after they have already begun.

Figure 11.6 below shows this page in action. We start by first selecting an experience and specific topic (Christian Basics and “Who is Jesus?” have been chosen for our example). We then specified the teacher who presented the topic, the date it was presented, and we chose “Accepted” as the response. We then use the Name Search tools to find each name who attended the presentation of this topic on this date by this teacher who had this response. Once we’ve found the name, we “mark” them

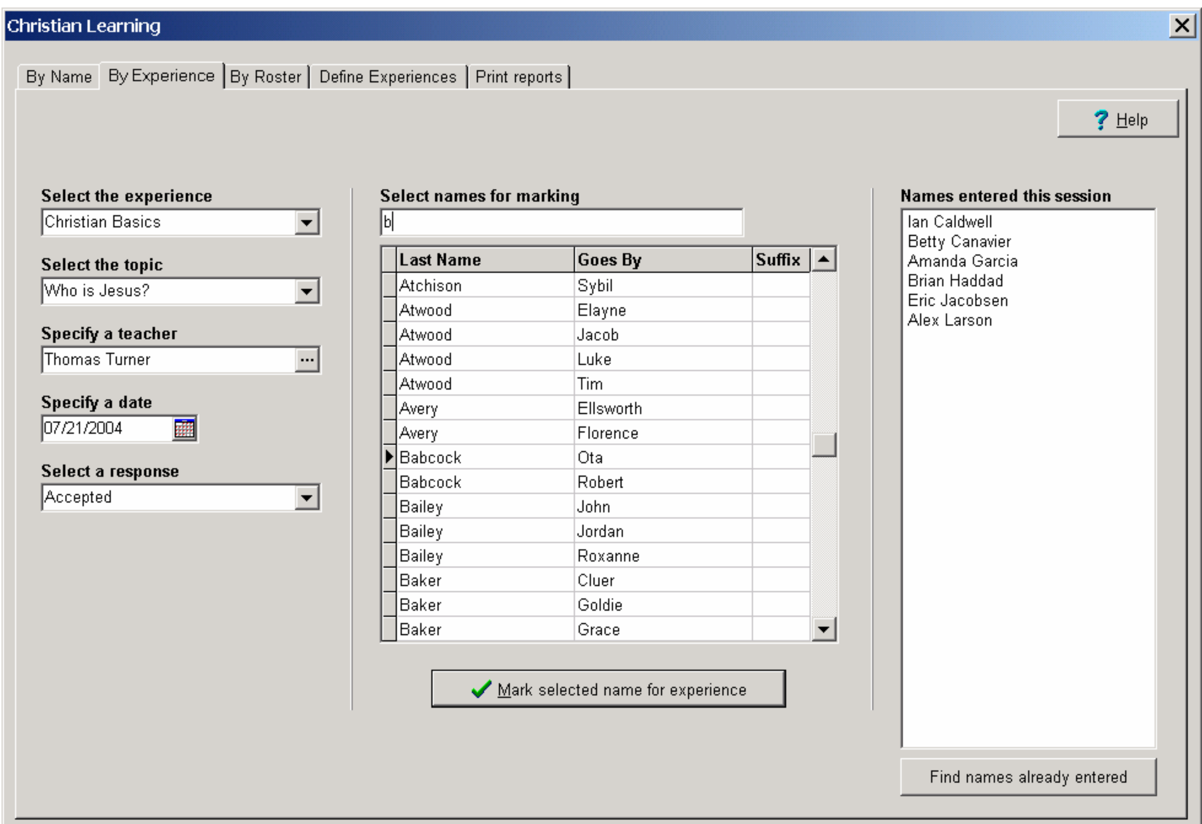

Figure 11.6: The By Experience page allows you to enter learning information about a large number of people in your file by using the Name Search tools provided. Use this page especially in those situations where the list of participants is likely to change over time or not be consistent.

by either clicking the Mark Selected Name for Experience button, double-click directly on the name in the names list, or press ENTER when the name is highlighted.

If you are interrupted in the course of marking names for a particular topic, teacher, date, and response, you can pick up your work again later on at any time. Simply return to this page, set the experience, topic, teacher, date, and response again, click the **Find Names Already Entered** button to see who's already been marked, and then pick up where you left off.

By Roster

The **By Roster** page of the Christian Learning dialog is used when you wish to add teacher, date, and response to one or more names in a *pre-defined* group learning setting. By that we mean a specific learning experience that is presented to a specific group of people that is not likely to change over time. Remember, if you are adding topics as you go along, or if you are adding people to the list of those who have completed the topic as you go along, use the By Experience tab page instead.

To illustrate, we'll create a learning experience entitled **Elders Training Course** and define a number of topics that pertain to the work of elders in your church. Since the list of elders in most churches is fairly static, meaning its membership likely won't change over the course of the learning experience, this provides an ideal example for using the By Roster page.

Once the specific LE has been create, the next step would be to define the list of names that will comprise your roster. There are two ways this can be done:

- Use the By Name page, select the Elders Training Course as the Learning Experience, then find each elder in turn on the names list. When you find an elder's name, click the Create Entry for Each Topic button, and the entire range of topics created for this LE will be created for the name who is highlighted.
- Use the By Roster page, select the name who should be added to the roster, and click the Add New Name to Roster button. This will result in the same action as in the previously mentioned method.

Steps for Using The By Roster Page

First you need to pull the roster of names with which you wish to work from the full list of names in your CMD data file. To do this, enter as many fields as needed to narrow the criteria for the search. We suggest that you follow steps in this order:

- Select an Experience and a Topic from the respective drop-down lists. These two are the *minimum* fields you should select to derive the roster.
- If you wish to include the Teacher field as a part of the selection to build the roster, click the **Select Teacher** radio button, and then enter the name of the teacher. If you defined a teacher for this topic when the learning experience was first created, it will be entered here automatically.

- If you wish to include the Date field as a part of the selection to build the roster, click the **Select Date** radio button, and then enter the date. If you defined a date for this topic when the learning experience was first created, it will be entered here automatically.
- Click the **Get Roster** button to retrieve all the names in your file whose Christian Learning data record matches the fields you selected. This will create the list of names from which to work.
- If you worked on this list in a prior session, you'll need to select the item in the Response field that you were working with before, and then click the **Find Names Already Entered** button to see who you've processed so far.
- If you wish to save a new date or teacher, click the **Save Teacher** or **Save Date** button after you've pulled up your roster to mark the names with the information you define in either the teacher or date fields.

Now you are ready to actually mark new names (or additional names if you were working with this list before) for each of the items selected in the list of fields in the left hand column. Use the Name Search tools in the center to find the name you wish to mark. Either double-click the name in the grid,

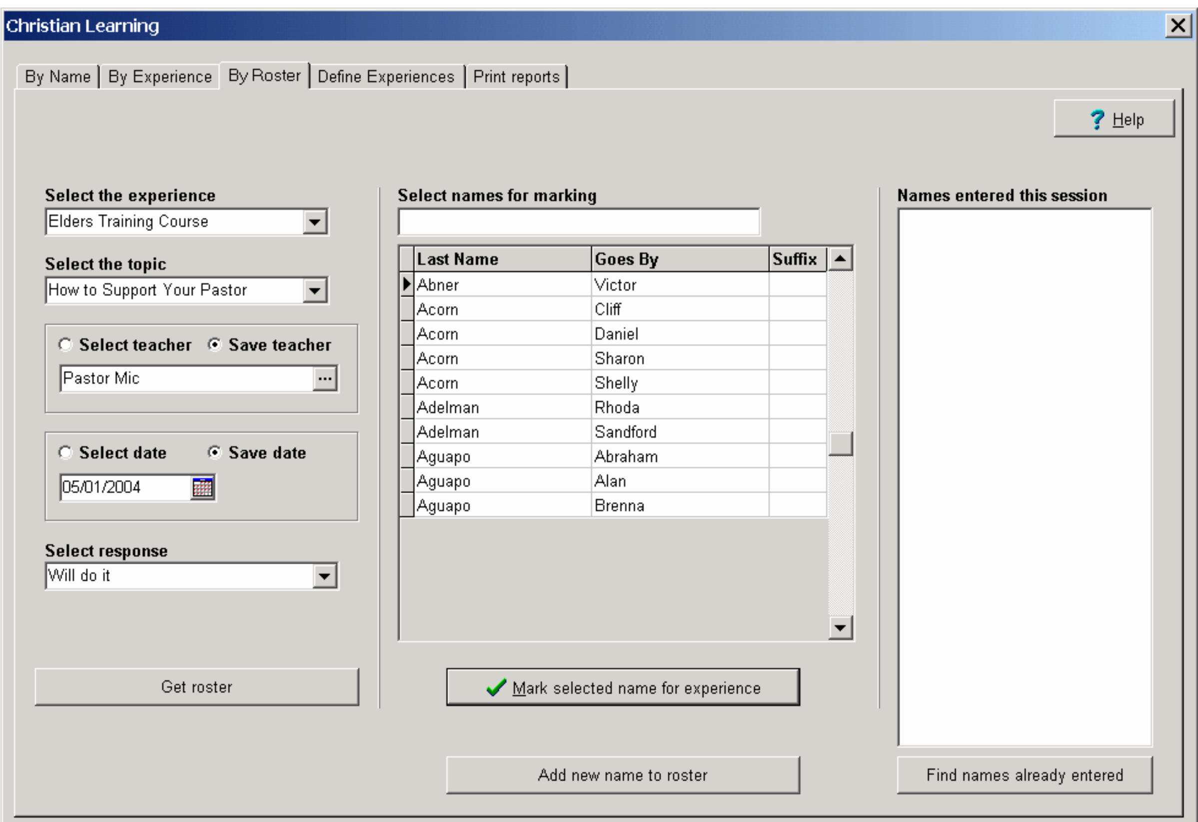

Figure 11.7. The By Roster page is used when you have a specific group of individuals who have already been marked as being a part of a learning experience. In the above example, the short list of names that you see had previously been marked to be a part of the Elders Training Course. When you click the Get Roster button, only those names previously marked show up, making the list easier to manage. Click the Add New Name to Roster button if you need to add a new person to the roster on the fly.

press Enter when it's highlighted, or click the **Mark Selected Name for Experience** button. The highlighted name's leaning file will be updated with the information in the left column, and his/her name added to the list in the right-hand column so you'll know whom you've already marked.

If you need to add a name to the roster who's not there while you're working on this page, click the **Add New Name to Roster** button. When you click it, a separate Name Search dialog will appear. Find the name you want to add. When you click the **Call Name** button, each topic for the experience you've selected will be automatically added to the name's learning record that you picked on the Name Search dialog, and the name will be added to the roster so that you can now mark the name.

If you wish to add the name without adding *all* the topics from a learning experience to the learning file of the selected name, you should go to the By Name tab page and enter the single topic there and then return to By Roster and click the Get Roster button again to add the name to the roster list.

Print Reports

The last page on the Christian Learning dialog allows you to print reports based on the information in the Christian Learning data file. As in other parts of CMD where reports are printed, there are controls available for fonts, printer selection, destination, page headlines, and more.

Output Forms/Setup

The **Output Forms/Setup** area is where you determine which names will be printed and how they will look. The options:

All Learning Experiences

This form prints only the information about the learning experiences without any names. This listing shows the name of the learning experience, each topic defined for it, the listing of any teachers and dates, and the list of responses you've defined.

The **Line Shading** field determines how often line shading appears to make the reports more readable. Enter a value of 0 if you do not wish for the report to have shaded lines. If you wish to change the depth of the line shading, double-click directly in the line shading field.

If you wish to **Include Comments/Notes** with the report, check the Include Comments/Note check box, which is the only additional parameter you can select. The format of the actual form the All Learning Experiences prints out will look different if you check this box in order to make room for the comments.

Specific Learning Experience

This output form option displays only the topics associated with the learning experience that you select from the drop-down list. As with the All Learning Experiences output form, if you check the Include Comments/Notes check box, the form is altered to accommodate the comments.

Specific Learning Experience Topic

This form prints only a **single topic** of a learning experience, including comments/notes for the topic. This form is most often useful in cases where you entered in the notes for the presentation in the Notes field provided when you defined the experience and topic. This page may be all you need in some cases to make the presentation of the topic selected.

List Names By Experience

This output form allows you to print a list of names based on a specific learning experience. You can be as general or as specific as you wish in determining the names that will appear in your list. For example, you might wish to print a list of all those names who were marked for the topic “Who is Jesus?” from the Christian Basics learning experience who heard it presented on June 21, 2004, by Thomas Turner. Note that in figure 11.8 we left the Response field blank. In this case, CMD will print the names who heard Thomas Turner teach “Where is Jesus?” on June 21 without consideration of the response. You could, if you wish select a response as well, creating an even more specific list.

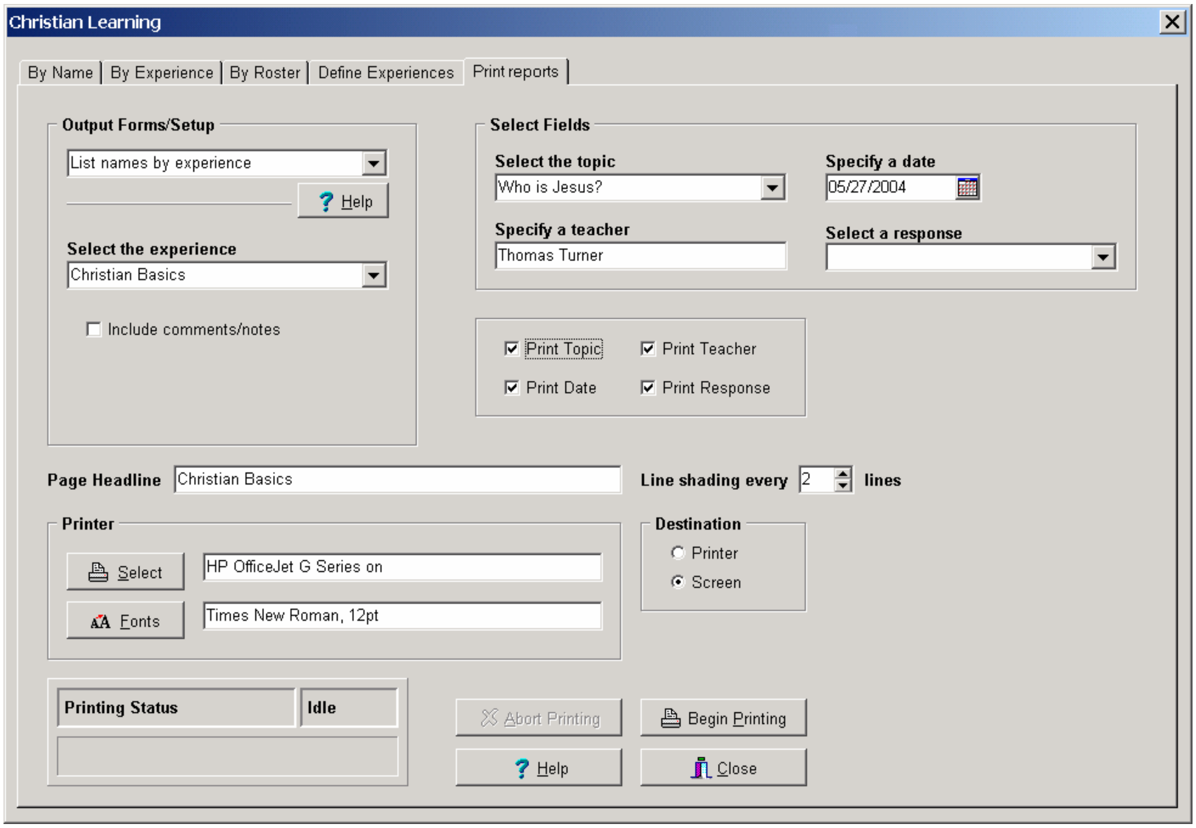

Figure 11.8: This screen grab illustrations the example in the List Names by Experience output form mentioned above. Each field that you select here further limits the names who will be included in the report. Notice the choices to Print Topic, Print Teacher, Print Date, and Print Response that are available if you don’t include comments/notes.

Or, perhaps you have a team of church members who like to give Bible studies and a number of them might have presented this topic to different individuals at different times. If you wished to see a list of all people who had completed this particular topic regardless of teacher or date, then all you would set is the experience and topic. Leaving the teacher and date fields blank would cause any name to be included who had been marked for this topic regardless of teacher or date.

If you leave the **Include Comments/Notes** box *unchecked*, then an additional set of choices appears under the Select Fields area. Based on the way you selected the fields, you may or may not need all of the fields to be included in your printed form. Use the check boxes to check or uncheck the fields that you wish to have included.

However, if you *do* elect to Include Comments/Notes, then these additional choices disappear because the format of the report changes making the additional choices unnecessary.

Labels, Envelopes, Phone Lists of Names by Experience

When printing labels, envelopes, or phone lists, you can make the same field selections as criteria as outlined above for listing names by experience.

While line shading is disabled for these reports, each of these have additional other choices that you can make that are appropriate to each type of printed form:

- **Labels**. You can select 2-up or 3-up laser label forms, or dot-matrix labels.
- **Envelopes**. You can print continuous feed envelopes or single feed them. You also can determine whether or not you should print a return address, and you can gain access to your CMD’s envelope preferences.
- **Phone List**. You can elect to mask out the area code for local area codes if you wish.

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12
Church Office Terms

Most churches have some sort of selection or election process to pick local church officers, board members, children's division teachers, and ministry leaders and assistants. Often the term "**nominating committee**" is used to describe the group of people who are selected to find leaders and assistants for the various ministry activities in a church.

The **Church Office Terms** item on the **Tools Menu** is a specialized feature to enable the work of a nominating committee (or whatever you call it in your local church). With it, you may...

- Specify the position a person holds within a church office or ministry
- Specify beginning and/or ending term dates for offices or ministry positions
- Print lists of current office holders or ministry leaders with their phone numbers for use by nominating committee members
- Divide up the responsibilities between several sub-committees if needed
- Send to disk lists of names for the final report to the congregation that can be edited in your word processor
- Track the histories of past offices held by names in your file
- Track interests expressed by your members for ministry or officer positions
- Prepare information for the "rap sheet" output form in Print Names which shows a name, their contact information, an optional picture of the individual, a complete listing of their current offices or ministry positions, a history of their past positions, and their interests in Print Names. See page 66 for information on selecting the Rap Sheet as an Output Form option.

The system is designed to work with a single or unified nominating committee, or where several smaller committees divide up the work and focus on only a few ministry areas each.

Using the tools in this utility will enable you to define or update church office information more quickly and efficiently for your entire congregation than by setting church office positions in Enter/Modify/Delete Names.

Suggested Work Flow

There are a number of ways to accomplish tasks using the tools in this feature. There is no one right way, but here's an overview of a flow that may help you as you start to use it.

Start By Updating Current Officers & Ministry Leaders

If your church uses multi-year terms for some offices, or if there is significant carryover from year to year in church officer and ministry leadership positions, a good place to start would be to get all of the current offices holders marked properly.

There are two tools on this utility that you can use to examine, update, add, or delete church office or ministry leadership positions:

- **Set Officers, Terms, & Positions by NAME** tab page. This page displays a name along with all of their offices, positions within the office, and term start and end dates.
- **Set Positions & Terms by Office** tab page. This page displays a list of the names already marked for the office that you select. On this page you can add or remove names from an office or ministry position. You can also update position and term dates on this page as well.
- Alternatively, you can use the **Add Names to a Menu Field** item on the Utilities Menu to quickly associate names with a given church office and then return here to Church Office Terms to finish your work.

Define Your Nominating Committee(s)

After you have marked all your names for the various officer and ministry leadership positions you will need, then you can define the members of the nominating committee. If your setting requires the use of more than one committee or several subcommittees, you can define each of them separately and then define which church office or ministry leadership positions each group will be working to fill.

Printing Forms

Once your officers list is updated and you've defined your nominating committees, you can print the nomination forms that can be used by the nominating committee or any of the various subcommittees.

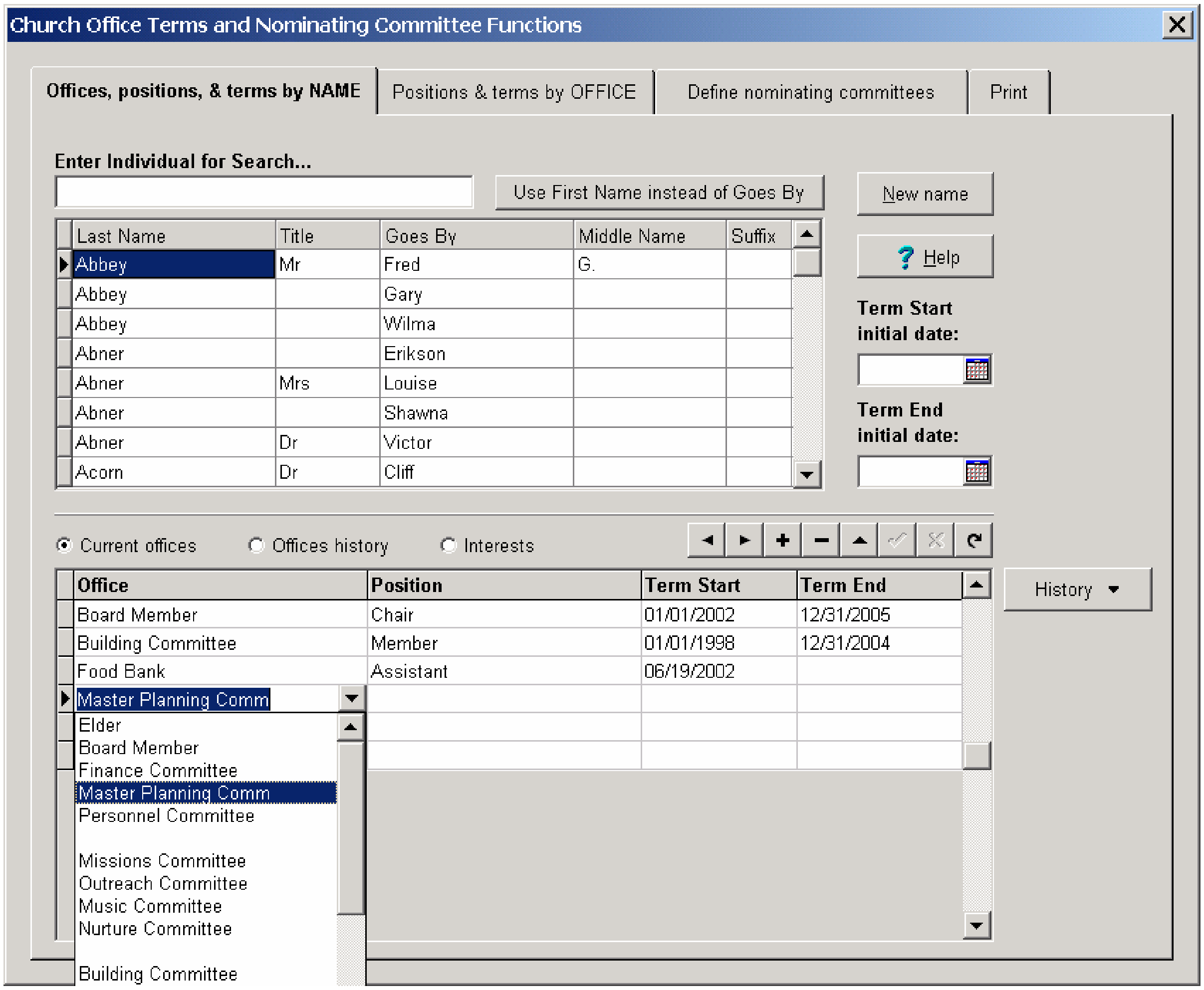
Follow Up

As your nominating committees finish their work, any changes to the church offices or ministry leadership positions should be updated in the CMD. Once the changes have been entered, the program can print a list of your names by office or ministry that may be distributed to your congregation.

With that overview in mind, let's examine each page of the utility to see how it contributes to the preparation or printing of materials for the nominating process.

Set Offices, Terms, & Positions by Name

This is the first tab page of the Church Office Terms dialog. The top part of the dialog displays Name Search tools for locating names. As you can see from the example illustration on the next page, Mr. Fred Abbey is highlighted. The offices that the highlighted name holds will be displayed in the Offices grid in the lower half of the page. You can see several listed there in our example Each row in the offices grid displays one office or ministry leadership position.



Also note just above the offices grid there are 3 radio buttons. The grid displays information according to the radio button that is selected. Generally, you will work with the **Current Offices** button selected when you intend to view or work with the offices currently held by the selected individual.

When you enter an office in Enter/Modify/Delete Names, all the information you see about offices are the list of office choices. Here, you can see other fields associated with offices: **Position, Term Start**, and **Term End**. All of these additional fields are used in printing the various forms that Church Office Terms can produce for you. If your church has some offices whose term is longer than a single year, use the Term Start and Term End fields so that the printed forms can show who should be replaced during the current year.

You may use the buttons on the navigation bar over the offices grid to add additional offices or delete any that you see there already by clicking the + or - buttons respectively.

Editing is done by clicking directly in the cell of the item you wish to edit. If you make a change, the check mark button on the navigation bar will become enabled. Click on this button to finish your edit.

Whenever you click into the **Office** field of a given row, a combo-box down arrow icon will be displayed so that you can select an office from your list of offices.

Clicking into the **Position** field also displays a drop-down icon when you tab into it, which will open the list of options for position: member, participant, leader, chair, assistant, etc. Select the item from the position list that describes the selected person's level of participation.

The **Term Start and Term End** dates should only be used when an office or ministry position carries a multi-year term. In such cases, at least enter the Term End date. The Term Start date is only for information at this point, and is useful for historical purposes. You can either type the dates in directly, or you can select them from a pop-up calendar by clicking the icon that is revealed with you click in the date cell you wish to enter or edit.

There are two "**Initial**" fields available to the right of the grid that displays the names in your data file. Initial fields are a convenience if you will be using the Term Start and Term End dates extensively. When you enter a value in these boxes, the calendars that pop-up when you enter a start or end term date will reflect the initial value you enter there.

New Name

When you are ready to work with a new name, click the New Name button to make sure everything that you have been working on is properly saved.

Offices History

If you wish to see the history of offices or ministry positions held by the selected name, click the second radio button located just above the offices grid labeled **Offices History**. There are two basic ways to fill in the offices history for a person:

- Edit directly in the grid as you do when working with current offices. Since this is supposed to be a history, it will be most helpful if you are able to include term start and end dates.
- Click the **History** button to reveal three choices. One choice will move whatever specific office that is currently selected on Current Offices to the name's history file. Or, you can elect to move all of the currently selected individual's current offices to their history file. Finally, you can have the CMD move *all* the current office positions for *every* name in your file to the history file. You might use this choice just as you begin to start your nominating committee work for a new year.

Interests

Click the Interests radio button just above the offices grid to see any interests that have been recorded that the selected name has expressed for consideration for future offices or ministry. To add items, click the + sign in the navigation bar and then click in the Office field to select the office they've expressed an interest in holding. You can additionally select a position if desired.

Set Positions & Terms by Office

The second tab page in this utility allows you to see the entire list of names who are currently marked as holding a specific office or ministry leadership position.

Start by selecting the office you wish to work with in the drop-down box. The names who are currently marked for the selected office will be displayed in the list.

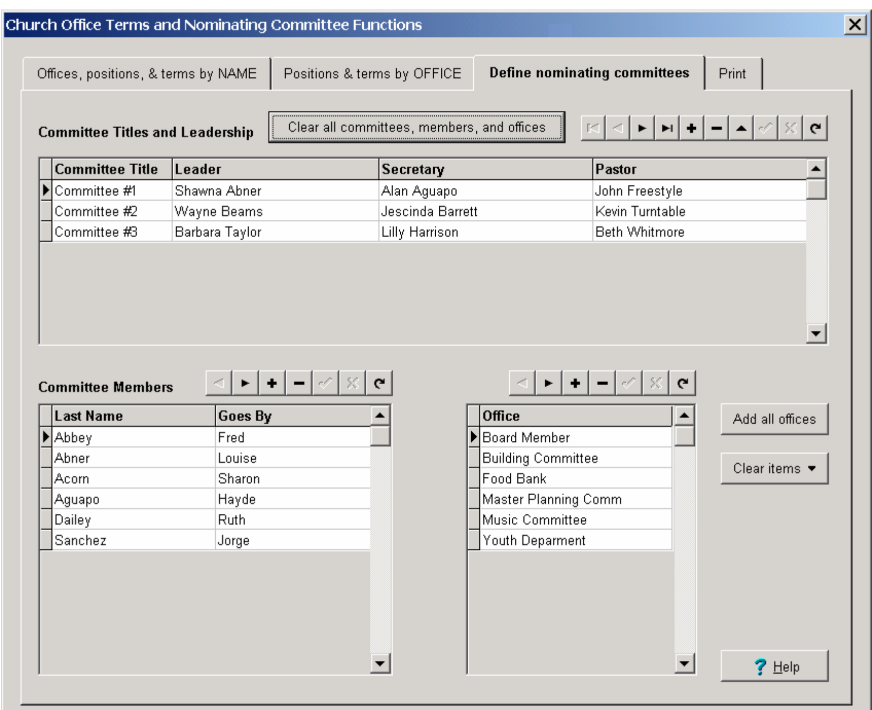
If you wish to update the **Position** or the **Term Start/Term End** dates, click on the name you wish to work on and make the desired changes. Note that on this page you may also set initial dates to make repetitive entries easier.

You may add names to the list or remove them as well. If you only need to add one or two names, use the **Add a Name to the Selected Office** button. If, however, you have a number of names to add, click **Add Many Names to the Selected Office** button. It will be more efficient when entering more than a few names. To remove a name, click on it, then click the **Remove Name** button.

Define Nominating Committees

When you are ready to define the nominating committee's) for your election process, click the Define Nominating Committees tab. On this page, there are tools to define the committee or sub-committee’s ID (in those cases where you work with several groups), the members of the committee, and the church offices or ministry positions for which they are responsible.

Below is what this tab page looks like. We’ll use the sample data in the illustration to explain how to use this feature.



Defining Committees

The grid in the top portion is labeled Committee Titles and Leadership. **Even if you use only one committee, you still need to define it in order to print the materials that will be useful to the nominating committee process.**

To enter a committee, click the + button on the navigation bar in the upper right corner of the dialog. This will open up some new space for a new committee. If the cursor is not already there, click directly in the **Committee Title** field and enter a name that will identify the committee. As you can see from the example we provided, the title need not be fancy.

If you work with several subcommittees, enter each subcommittee as a separate entity here. You can further specify a **leader**, a **secretary**, and a **pastoral sponsor** for each committee. You can either type the names in directly, or you can click the icon that appears when you click or tab into one of the name fields to find the name on the Name Search dialog.

Defining Committee Members

Once you have defined the committee title and leadership, you are now ready to name the members of each committee. First, click on the committee in the Committee Titles and Leadership grid for which you want to define members.

Once selected, turn your attention to the grid in the lower left corner of the dialog. There is a separate navigation bar for the Committee Members grid. To add a new member, click the + button and a Name Search dialog will appear. Select the name and click Call Name.

Continue adding other names until you have selected all names for the selected committee. If you need to select members for another committee, click on the Committee Title up above that you wish to work with, and then add members to that committee as before.

If you need to delete a name from a committee, highlight the name and then click the - button on the navigation bar.

Selecting Offices

Finally, you need to tell the program which offices are to be the responsibility of each committee. If you work with a single committee, you can click the Add all Offices button and each office from your offices list will be added in a single operation.

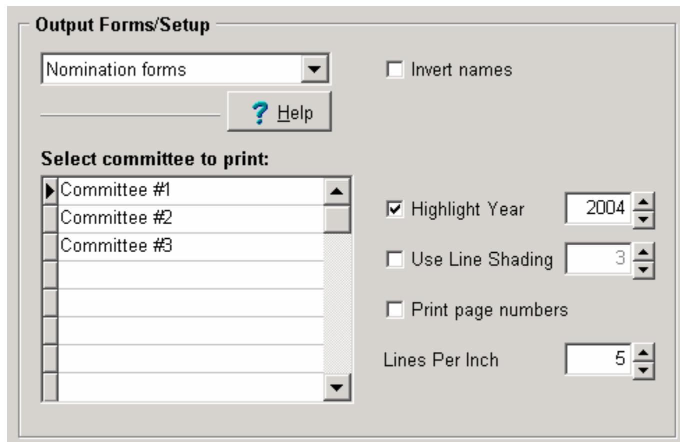
If you work with multiple committees and divide up the work, then click the + button on the Offices navigation bar and select an item from your offices list. Continue to select offices as needed. You’ll need to add each item separately from the drop-down list when you click the + button. Click the - button if you need to remove the selected item from the list.

Printing

Use the Print tab page to select the form you'd like to print and how you want it to look. Only the Output Forms section on this dialog is unique from other print control dialogs in CMD, so that is what will receive our focus here.

Nomination Forms

This output form prints all the offices that are associated with any specific nominating committee or sub-committee. The office is first listed, followed by all names currently associated with the office.



When this option is chosen, you should first click on the committee whose offices you wish to print. Only the offices that you associated with the selected committee on the Define Nominating Committee tab page will be printed.

Next check the box to Invert Name if you wish for the names to be printed with last name first.

Then, select the **highlight year**. The highlight year is useful if at least some office or ministry leadership terms last for more than one year. This enables the committee working on filling the positions to tell at a glance who is up for re-nomination and who does not need to be re-nominated or replaced. Names up for re-nomination or replacement are printed in bold.

When the names are printed, their name will be printed first, then their term's end if you've defined term ending dates, followed by their home and work phone numbers. Copies of these pages can be given to each member of your nominating committee for their use as they work to staff each ministry or office position.

You can also set the program to use line shading to help make it easier to read, tell the program to print page numbers, and adjust the lines per inch setting to provide more space for your committee members to write information on the pages that are printed.

Full Nominating Committee

This form prints a page with all members of the nominating committee listed together. No divisions into subcommittees are made for this list.

When this item is selected, a large memo-type dialog appears that you can use to enter headline information that should appear on the form.

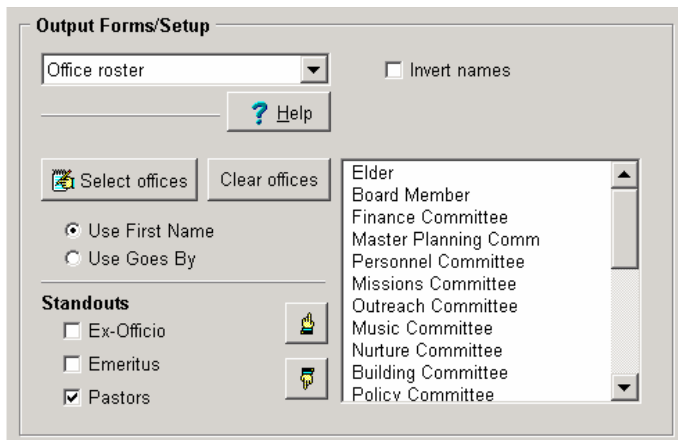
Sub-Committees

This form is designed to be sent only to a disk file for incorporation into your word processor. It prints the committees divided by sub-committee along with phone information.

It is sent to a disk file because there is no way to predict how many committees or their size so CMD cannot tell how to format the page. Since you send this information to a disk file, you can call it up in your word processor or page layout program and format it appropriately to your setting.

Office Roster

The final output form available here is the Office Roster form, which also must be sent to a disk file. It's function is to provide you with the information necessary to print a finished leadership report which can be distributed to your congregation in whatever form you find appropriate.



First, select the offices you wish to print. At first glance, it may seem desirable to print all offices (and eventually you likely will), but the task of formatting the information will be easier if you do it in smaller groups of officers. If you wish to divide up the formatting of information into several pages, click the **Select Offices** button. The list will be cleared, and you will be shown a dialog that will let you select the offices you wish to include.

Note that the offices will be printed in the order you select them. After you have selected the offices and have returned to this dialog, you can re-order the offices as needed by clicking on the office you wish move and then clicking the up or down finger-pointer to move the item to the appropriate place on the list.

We suggest that you use Goes By, but you can use First Name if you wish.

Standouts refer to those names that you may or may not wish to have appear at the end of the list. For example, you may wish for the pastors who are assigned to work with a specific ministry or office to be printed after all the regular names have been printed. In those cases, clicking the Pastors check box will pull their name from the list and print it at the end of the offices list.

When an office is printed, any leaders that have been marked will appear first, then the regular members or participants in the office or ministry will be printed. Format the list as desired in your word processor.

Need Other Forms?

If your local selection process needs additional forms, contact us and we'll do our best to add forms that you need if we are able to.

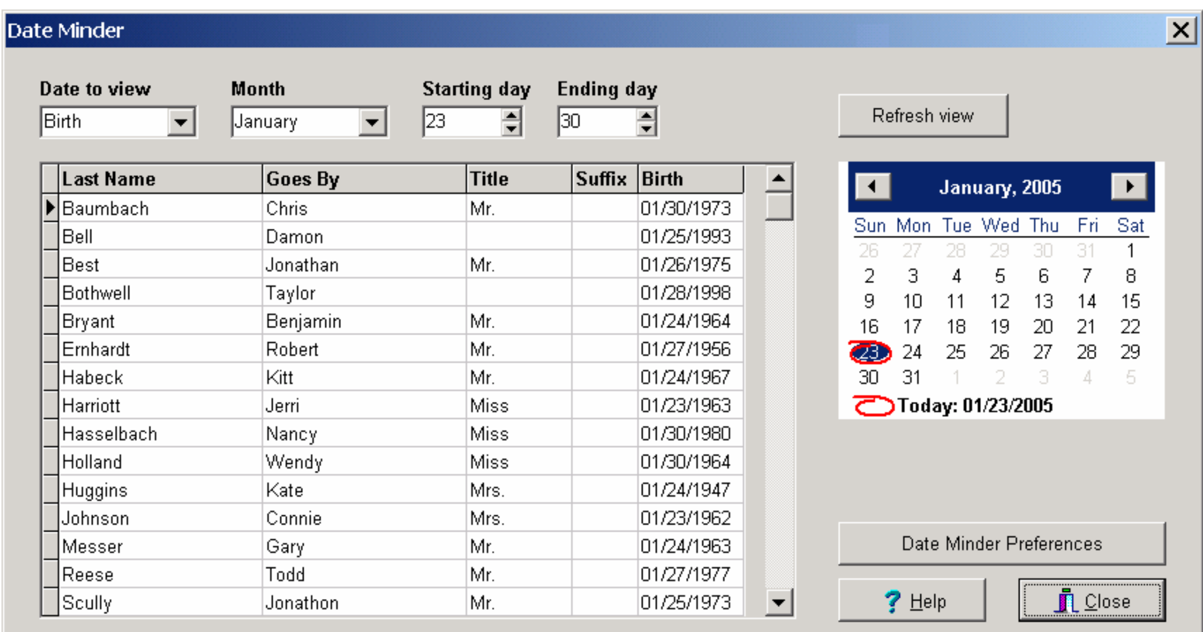
13
Date Minder

Date Minder, available as an option on the Tools Menu, provides you with a quick-glance view of names with upcoming important dates. When the Date Minder dialog (see below) first appears, it will display the list of names that match the criteria you have specified as the default list on the Date Minder Preferences dialog.

Though you can get this same data through Print Names, Date Minder may be faster and easier to use when you want to preview a list of names for whom an important date is upcoming. Date Minder presents you with an easy, visual reminder of important ministry opportunities that might be connected with the names and dates that are listed.

For example, let’s say that you make it a regular practice to visit a surviving spouse or other family member on the anniversary of an important bereavement date. Or perhaps you like to send out congratulations cards to those celebrating anniversaries in the next couple of weeks.

Date Minder allows you to specify most any date in CMD’s data file to be the basis for the list. You can also define a day range through the end of any month you choose. The following examples will illustrate.



The Date Minder Dialog

As you can see from the screen grab on the previous page, there are 4 controls at the top of the grid:

- **Date to View**. From this drop-down box, select the CMD date on which the list is to be based.
- **Month**. Select the month of the year that will contain the date range. For example, if you want to see a list of those who have birthdays in January, select January from the list.
- Start**ing/Ending Days**. Use the spin edit controls to enter the starting and ending days for the month your selected. Note that you cannot go beyond the end of the current month in your selection.

Once these options have been selected, click the **Refresh View** button and the list will immediately reflect the items that you selected above.

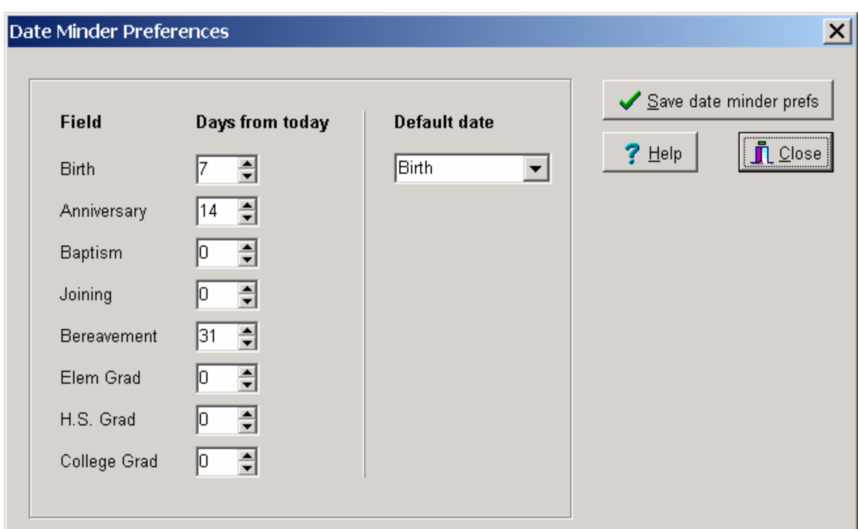
Note that you can change the settings at will and a new list will be displayed to reflect the settings every time you click Refresh View. A calendar is provided on the dialog to help you determine dates if needed.

Future editions of CMD will enhance the Date Minder dialog's functions to include the ability to print the list right from this dialog, and different ways to sort the data.

Date Minder Preferences

The Date Minder Preferences dialog shown below, available either as a choice on the Preferences Menu, or when you click the Date Minder Preferences button on the Date Minder dialog.

In the sample screen grab, you'll notice that the default date is Birth, and the value in the **Days from Today** box for the Birth field is 7. This means that whenever Date Minder is displayed, the date that will appear automatically by default is a list of names whose birthdays are within 7 days from today



(or until the end of the month, which ever comes first). You can set each CMD date's range independently, and is the value that will be used automatically whenever you select that date on the Date Minder dialog. You can change any of the values once you've selected a date, but these defaults give you a place to start to fit your normal practice.

For example, some pastors will ask their secretary at the beginning of each month to prepare a letter for each person during the month who will have a birthday. Date Minder enables you to see such a list at a glance any time you wish.

Remember that the values in the date range for Date Minder are only calculated for the current month.

Start Up Function

Date Minder can also be set as the startup function for when you first start up CMD if you wish. To set Date Minder as the startup function, click the Date Minder item on the Startup Function item on the Preferences Menu.

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14
Organizations

CMD's **Organizations** file, available as an item on the **Tools Menu**, is designed to store information about organizations that you interface with regularly in the course of the work of your church or its office staff. This data file is separate from the data base that stores and prints names and addresses.

You can enter organizations in the main data file if you wish. You'll have to enter them in as a "family" by entering the address and phone information. Then click the Add New Family Member button and select Organization. Enter a contact in the individual data area. However, we do not recommend that you place organizations into the main data file unless you need to include them in general mailings. Otherwise, it will be best to store organizations in the organizations data file.

Some types of organizations you may wish to store in the Organizations data file:

- Area Churches
- Local aid resources (shelters, detox centers, legal aid)
- Important maintenance and repair contacts (organ repair, plumbing, locksmith, etc)
- Local business contacts (printers, office supplies, religious book stores)

All functions for using organizations have been incorporated onto one dialog with 3 tab pages. When you select Enter/Modify/Delete/Print on the Organizations Menu, you'll see the dialog shown on the next page.

Enter/Modify/Delete Organizations

The first tab page facilitates the basic functions of entering and maintaining the items of information you can store about organizations. Most fields and their use are obvious. The unusual ones to notice:

Type of Organization

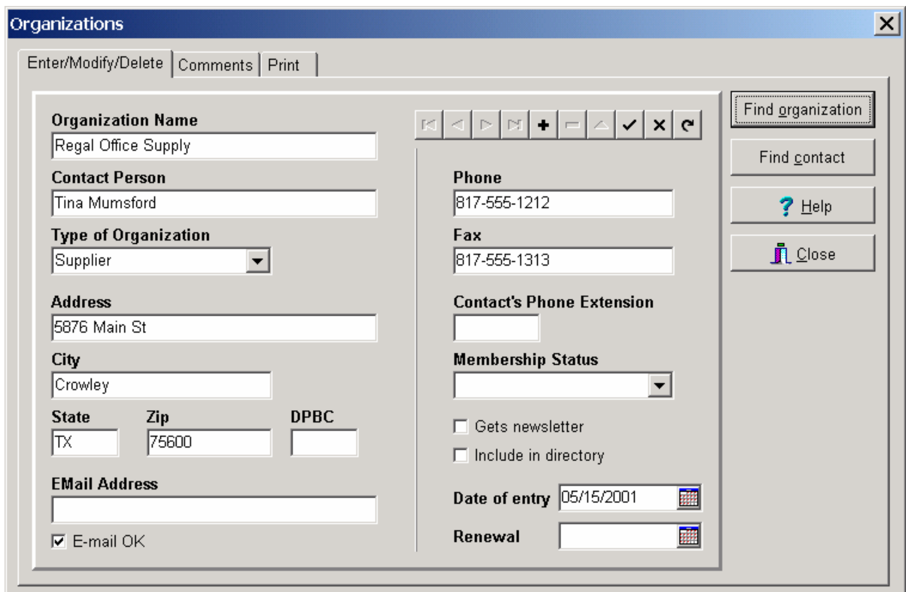
This drop-down list is the organization's equivalent to Membership Status (though we provide that field as well). If you wish to add to, remove from, or edit the items on the list, double-click your mouse pointer in the drop-down edit box.

Membership Status

We provided this choice because initially we had planned to merge the data from this file with the main data file when printing lists. We have not implemented this option at this time, but you may wish to include a choice in the Membership Status list called “Organization” and use it to mark each new organization that you add here in case we do provide a merge function in the future.

Gets Newsletter & Include in Directory

These two fields were also added in case we provided a way in the future to merge the data in this file with the main CMD data file.



Dates

Two are provided. Use the Date of Entry as the date you first entered the organization, or alternatively, enter the date your subscription begins in the case of companies that provide service contracts with your church.

The Renewal date is provided to jog you of when subscription dates are up for renewal.

Comments

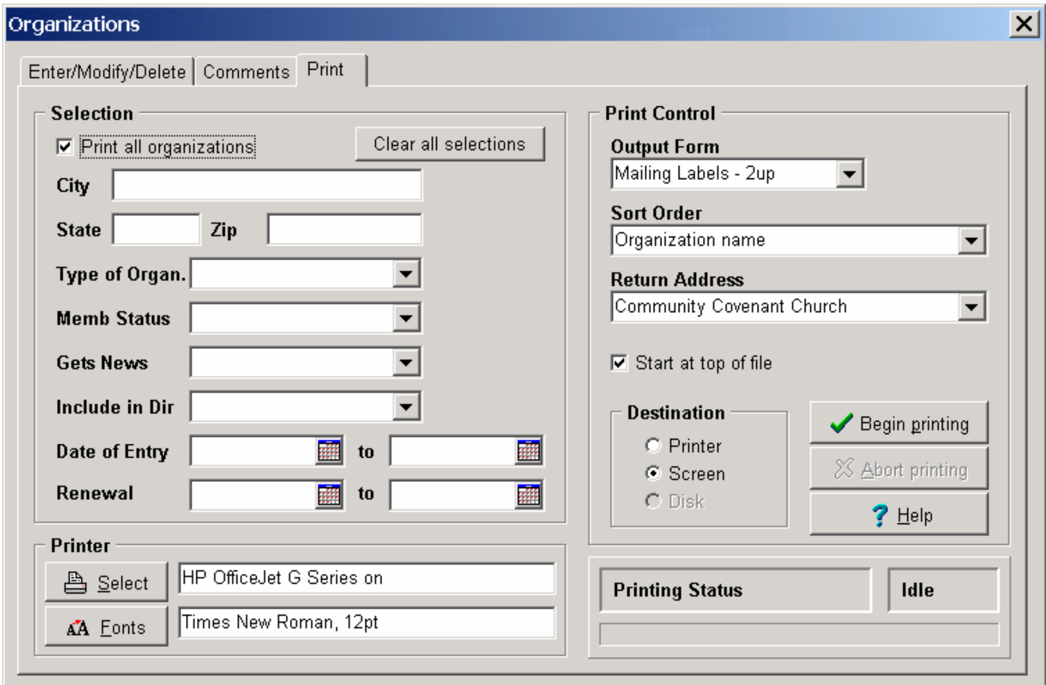
To enter comments for an organization, call it up to the screen and then click the Comments tab and enter comments as needed. To save the comments, click the check mark icon in the navigation bar. You can also use the navigation bar, the Find Organization or Find Contact buttons to locate the organization for viewing or entering comments.

Printing Organizations

To print the organizations, click the Print tab page. The Print tab page, illustrated on the next page contains the controls needed to print organizations in various ways.

Selection

The Selection area provides the means to determine which of the organizations will be printed.



Print All Organizations

Check **Print All Organizations** box only if you want to print all organizations without considering any other criteria. If this box is selected, the other items in the Selection are disabled.

Other Fields

To use any other field as the criteria for the list, uncheck the Print All Organizations box and select the fields or fields that you wish to use for the criteria for the list. Depending on the choice you make, you'll need to make a selection from a menu, drop-down list, or specify a date range.

Print Control

The **Print Control** section allows you to determine what the printed information will look like, how it will be sorted, which return address to use (if used by the selected output form), and the buttons to initiate or interrupt printing.

While there are several options for output forms available for printing organizations, the choices here are more limited than in Print Names since there are fewer fields to work with and fewer items to print.

Make sure you make all the choices you wish in both the Selection and Print Control areas before you click the **Begin Printing** button.

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15

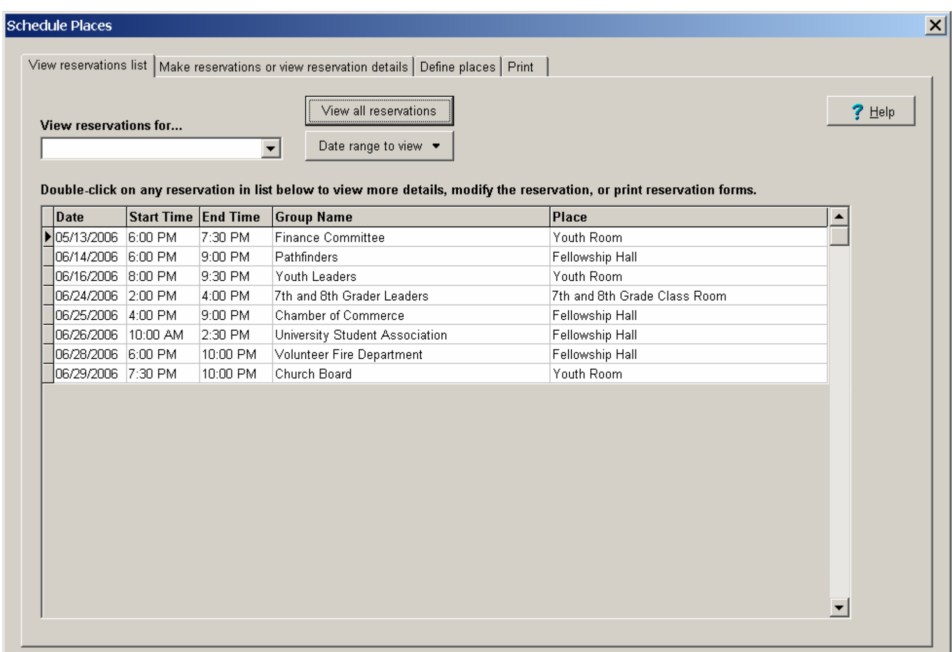
Schedule Places

Schedule Places

The **Schedule Places** tool allows you 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** | Places. Other schedule items will be added in future CMD updates.

When you first arrive at Schedule Places, you'll see the following dialog with 4 tab pages, each with a specific set of features and functions: View Reservations List, Make Reservations or View Reservation Details, Define Places, and Print.



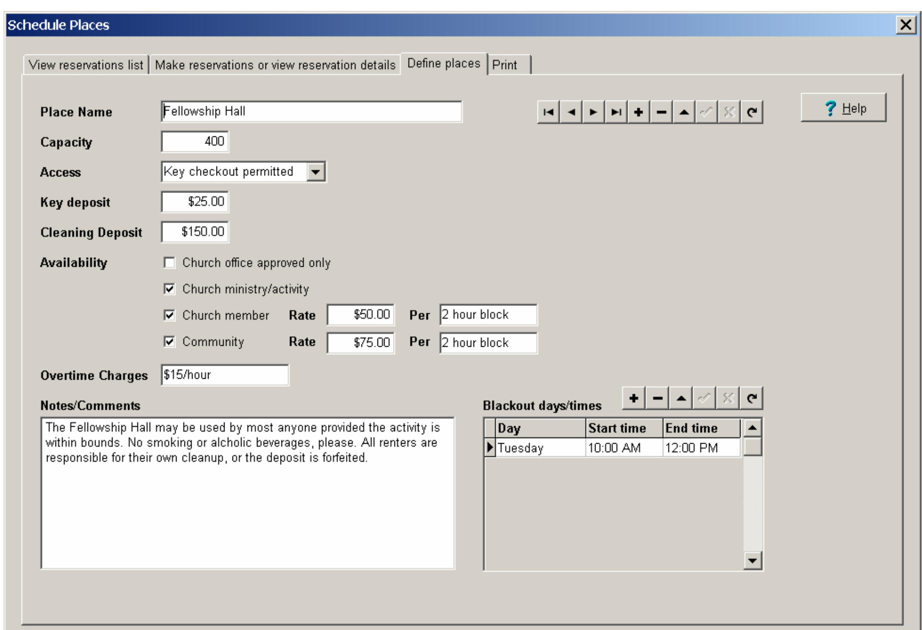
View Reservations List page

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:



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

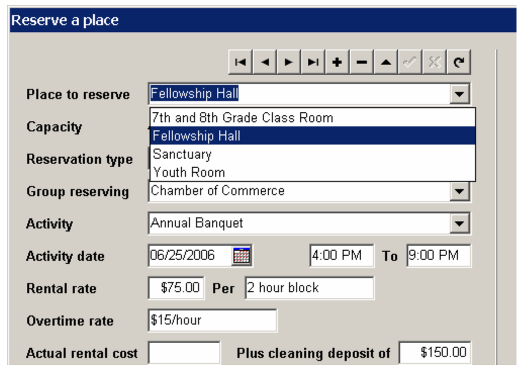
If you need to view the various places you’ve defined or if you need to modify any of the details about them, use the navigation bar just to the right of the Place Name field to move around in the list of places.

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.

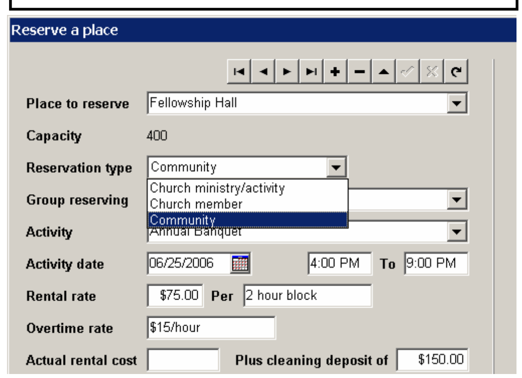
Make Reservation

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:



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.



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.

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.

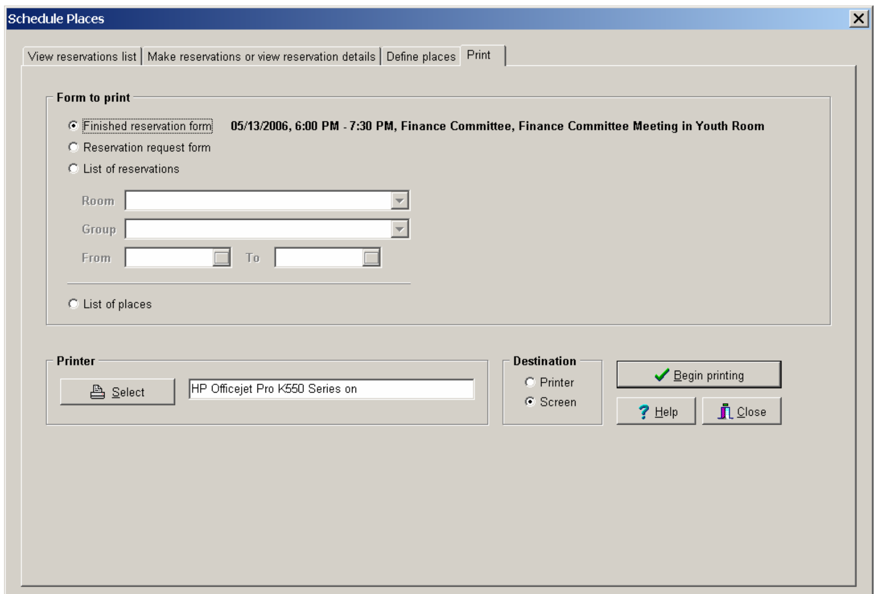
If you are already at the Make Reservations tab page, use the buttons on the navigation bar located above the Place to Reserve field to move around the list of reservations.

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 a 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.

16
School Info

The **School Info** item on the **Tools Menu** allows you to extend the usefulness of the **Child Registry data file** to better focus on local school attendance for your school aged children.

Information about which specific elementary or high school in your area your church's children attend might be particularly useful if your church supports or runs a Christian school.

In addition, there may be times you'll need to access a group of parents or students based on their school or grade. School Info allows you to define and then print by school information for each child in your church.

The **Child Registry** dialog, available when a minor child has been selected on the Enter/Modify/Delete Names dialog, also allows you to enter the same school information that is made available to you here on the School Info dialog. However, the School Info dialog allows you to enter school information **more quickly for several or even a large number of children**, and it also **allows you to print reports** based on school information.

The **School Info** dialog has two pages that provide the functionality you will need.

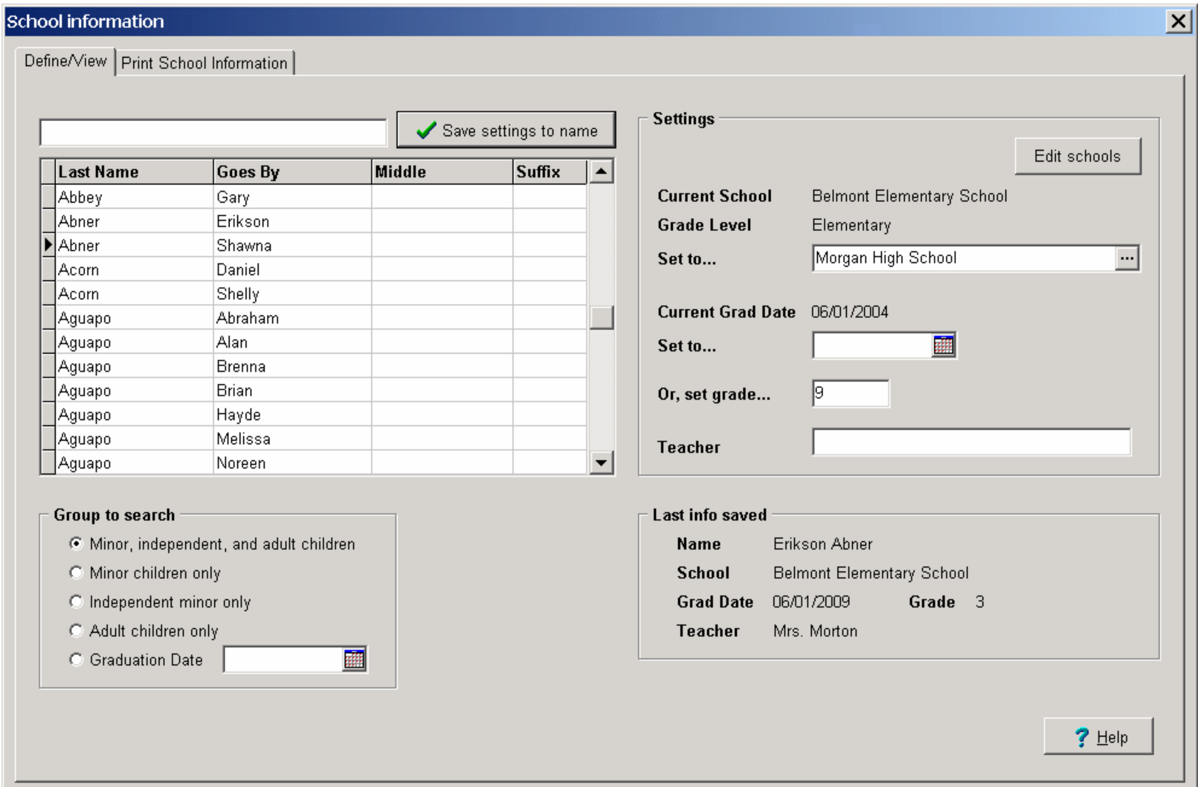
Define/View Page

If you need to quickly view or set the school information for one or more students, you will work from this page, illustrated on the next page.

The page has **Name Search tools** in the upper left corner of the page, and a **Group to Search** box in the lower left corner of the page, which serves to limit the list of names that is presented from which to search.

On the right side of the page, there is a box that shows the current school info **settings** for the highlighted name, and a box that displays the **information of the last name** for which school info was saved in this session.

In the example screen grab, you can see the school information that is about to be saved for Shawna Abner. Currently, her school is Belmont Elementary, but notice that her current graduation date was June 1, 2004. That means that she is now in high school, so we need to change her school information.



To do this, we need to use the **Set To** fields to update her information. In the Set To field located under the **Grade Level** in the **Settings** box, we've selected Morgan High School. We picked that school by clicking the icon on the right edge of the Set To field that brought up our list of schools. You can edit the list of schools in your area by clicking the **Edit Schools** button.

Since she's now entering high school, we need to store her new graduation date.

Setting the Graduation Date

There are two methods for doing this. First, you can directly enter the new graduation date in the **Set To** field under the **Current Grad Date** field. Or, you can simply type in her new current grade, grade 9, in the **Or Set Grade** field in our example, and CMD will calculate the correct graduation date from the entry.

More on Graduation Dates

For purposes of this School Info feature, **graduation dates will *always* occur on June 1 of any given year**. Most graduations will be within a few weeks of this date, hence our choice. All internal calculations regarding graduation dates are made with the assumption that June 1 is always the graduation month and day. So don't use the actual grad date. Always use June 1!

This also means that you need to be careful about the dates you enter if you are updating school information prior to June 1!

Since CMD stores a graduation date instead of a static grade, you need only alter the graduation date when you first define school information for a student, and then once again when they graduate from elementary school and head off into high school. Otherwise, the graduation date is used, based on the Grade Level, to produce the current grade whenever you view a child's school info or Child Registry info.

Even if your area's school system has more divisions such as middle school and junior high, you can adjust the school name as required, but in all cases, render the graduation date as the date they leave elementary grades and move into high school. As long as you are consistent in this regard, you'll always know what grade your students are in.

Teacher Field

Generally high school students will take classes from many different teachers, thus making the Teacher field unneeded. However, you may wish to enter elementary teachers' names if you have them when entering school information.

Saving School Information

When all the information about this student is correct, click the **Save Settings to Na**me button or press ENTER. The information will be saved, and the next name in the Name Search area will be selected. The information you just saved will be displayed in the **Last Info Saved** box so that you'll have a handy reminder of whose info you've just updated. This is especially helpful when you have a large list to update in case you lose your place in your list and need to be reminded who you last updated.

Saving School Info for a Large Group

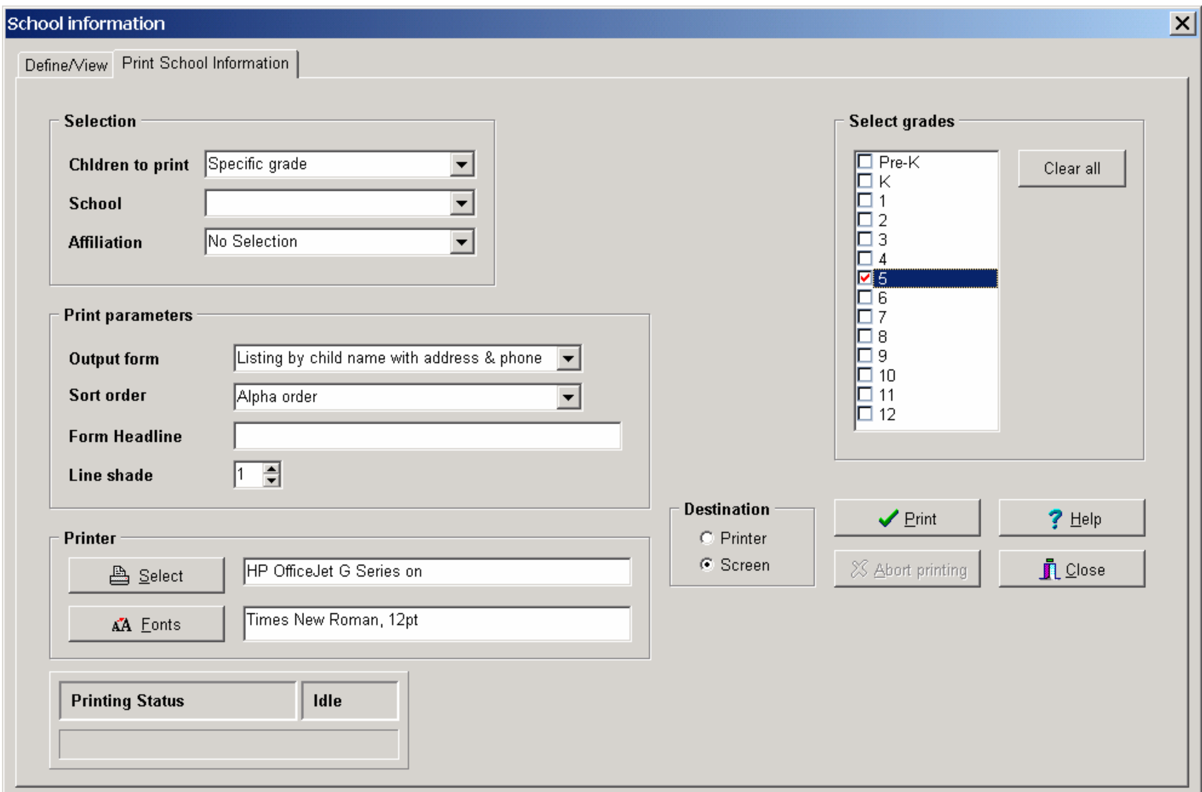
As stated in the introduction to this chapter, these same fields are available to you on the Child Registry dialog in Enter/Modify/Delete Names. We've duplicated those same fields on this feature because there may be times when you need to enter school information for a large group of students. The School Info dialog excels at this.

The items you define in the **Set To** fields for both school and graduation date, and the information in the **Teacher** field will all be retained after you save the information for an individual. This enables you to enter information about a large number of students simply by highlighting their name and then pressing Enter if their information is the same as what's already defined in the Set To fields. Of course, if the information is different for the next name you need to work with, highlight the name, and adjust the Set To Fields as needed.

If you can work from a list of students already divided up by grade in a specific school, you can use this dialog to enter the current school information about the students on your list very quickly.

Print School Info

You'll notice familiar tools to set printers, fonts, destination, and buttons to start and stop printing. There is also a Selection box which contains controls to pick who should be printed, and then the Print Parameters box, which allows you to define how they will look.



Selection

The list of choices includes various ranges of children and school attenders:

- All Children
- Children Marked for School
- Children Not Marked for School
- Elementary Only
- Elementary Graduates
- High School Only
- High School Graduates
- Specific Grades You'll see the Select Grades box appear with this choice so that you can indicate which grade(s) you wish to print.

Further, you can limit the list to a specific school and/or Affiliation by using the drop-down menus provided.

Print Parameters

Output forms include the following:

- Listing By Child Name with Address & Phone
- Listing By Child Name with Phone
- Listing by Family
- Mailing Labels to Children. Select either 2 or 3 up labels as needed. If you wish to mail to the parents of children, enter the words **To the Parents of** in the **Page Headline** field.

Sort Order

The order selected will influence the way the forms look. For example, if you choose to print All Children in Alpha order, the school name will appear in the listing. However, if you elect to print the names in School order, the names will be alphabetized within each school and the school will be listed in a header separating each school's students.

Sort order options include Alpha, School, and School/Grade orders.

Other parameters

- Page Headline, a field you can type in that will appear as the header on each page of the report
- Line Shading, which can make some of the reports easier to read. If you wish to eliminate line shading, set the value to 0. If you need to lighten or darken the shading, double-click directly in the line shading field to get the Preference box where you can make the change.

Note that while you may select fonts, be careful in the font settings you make since the forms were designed to fit on a page using the default font setting supplied.

Additional Notes

Some combinations of selection and parameters won't work together. For example, you cannot print a list of Children Not Marked for School in School/Grade order.

If the program doesn't let you select a certain combination of items, it's because internally that combination cannot work. If you attempt to make sure a selection, the program will automatically set the controls to the closet combination that will work with your settings.

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17
Worship Planner

If your church presents a variety of worship experiences in which the details of the service itself are often more complicated than is printed in a normal program or bulletin, then the **Worship Planner** item on the **Tools Menu** will be helpful.

The Worship Planner allows you to define **worship events**, which can be an evening worship, a praise service, regular worship services, your adult or children's education hour, an outreach event, seasonal worship, or any other kind of worship event you wish to track.

For each event you can track a number of items that would not normally appear in a bulletin or printed program. For example, the worship planner enables you to track those groups who come to perform or help lead in worship, where a worship leader will stand, what microphone or lighting is required, music used for congregational singing and special music, prayer leaders, and more.

The worship planner can track and remember the worship or praise team that plays for a given worship event, and it can even help you (as the functionality is added in the future) track how often certain people are used as well as resources such as hymns or choruses.

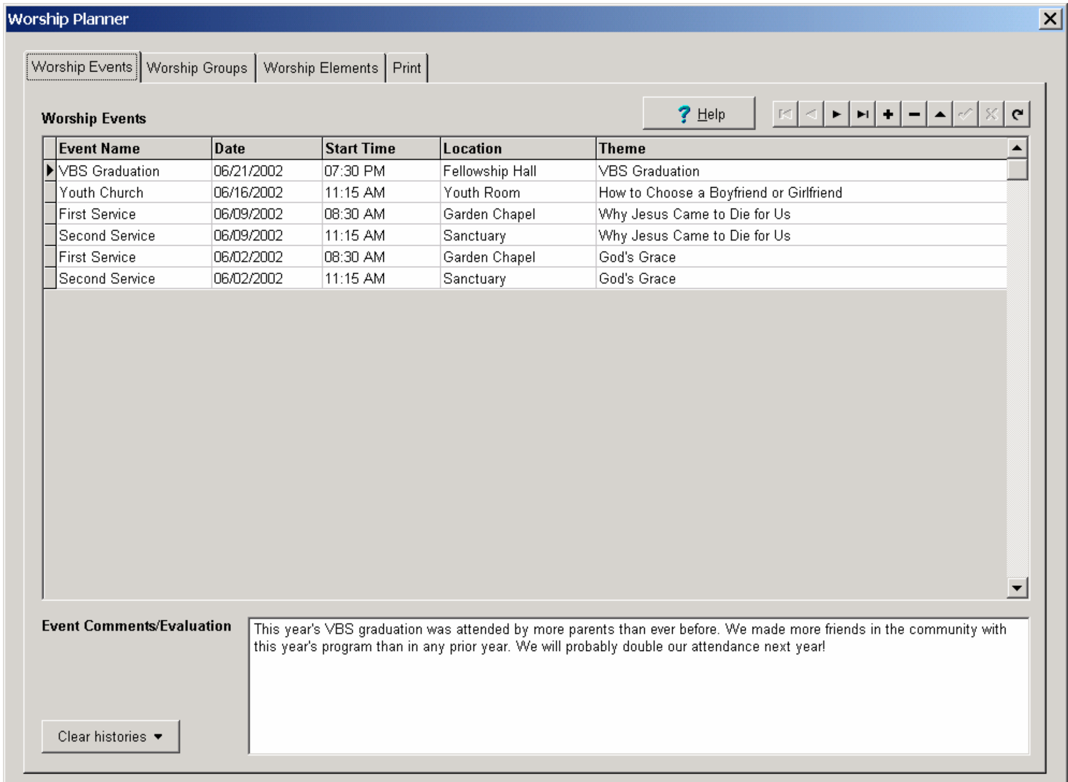
Even if you don't need to use any of the printed forms that the worship planner can prepare for you, it may be worth using the worship planner just to have a record of who participated and on what date and what songs or hymns or dramas were used.

Worship Events

As the first page on the Worship Planner dialog, the Worship Events page is where you first define a worship event. It is illustrated on the next page.

To define a new worship event, click the + button in the navigation bar in the upper right corner of the dialog. The cursor will be placed in the **Event Name** field. Enter the generic name for the worship event if it's a repeated event such as regular weekly worship, or enter the specific name of a seasonal or special worship event. Several examples are given for you in the illustration.

Press Tab to finish the Event Name entry to enter the date. You may click the icon if you wish to use a pop-up calendar to enter the date. Press Tab again to enter the Start Time, Tab again to enter the location of the event, and tab one last time to enter the theme, the guest speaker or artist, or sermon title.



You can also click directly in the Event Comments/Evaluation memo box at the bottom of the dialog to enter any other information you may wish to enter about the event.

Elements to the worship event are added in another place. Only use this tab page to initially define an event and its date.

Do not just overwrite the date and theme fields of a current worship event when you wish to start a new worship event. If you overwrite the events, you won't be building up the historical record of who participated and what music or dramas were used.

Whenever you enter a new worship event name that has not been used before or a location not used before, the program will remember these new entries and present them in a drop-down list for later selection if you wish to help make repeat entries easier.

Worship Groups

The Worship Groups page allows you to define the groups who regularly participate in your worship services. The reasons why it is helpful to define them will be evident when you enter Worship Events on the next tab page.

The Worship Groups page also allows you to define the praise or worship team members that participate from week to week.

The screen sample of this tab page shown below gives several examples of different types of groups. The highlighted one, Choraliers, is a choral group.

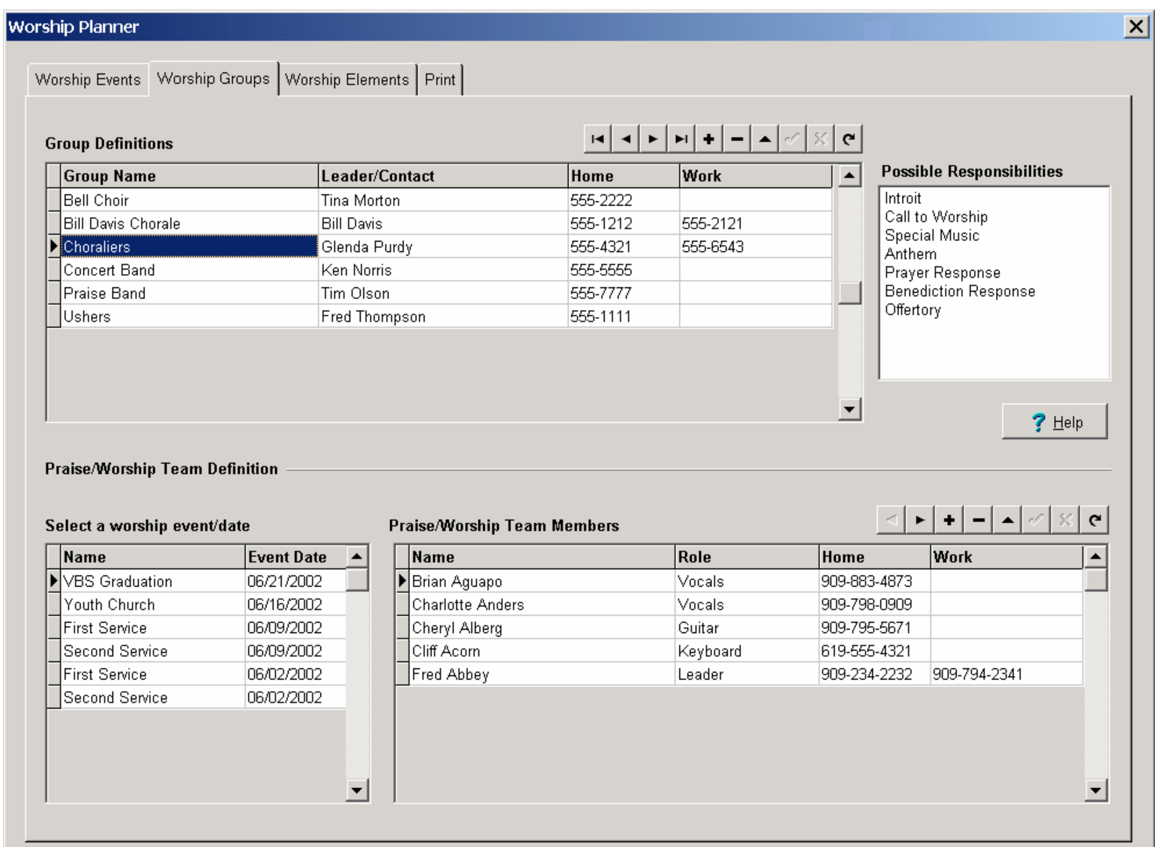
There are fields that track the group's name, the group's leader (which can be selected from a Name Search dialog if the name belongs to your church or can be typed in directly when the name is from outside your church), and phone numbers.

To the right of the grid is a box labeled **Possible Responsibilities**. In the case of our example, since the Choraliers are a musical group, the list of things they might do in worship may include things like Introit, Call to Worship, Anthem, Special Music, etc. Note that these and other responsibilities have been listed for the Choraliers. Each group will have its own unique list of responsibilities.

Notice that we have entered Ushers as a group. They will take up the offering, provide ushering, close or open curtains or shades, or perform other duties. Even though they are different than a music group, still they are a group that participates regularly. You'll soon see why this is useful.

Praise/Worship Team Members

To define the members of a worship or praise team for a given worship event, first click on the specific event and date in the grid in the lower left corner of the dialog.

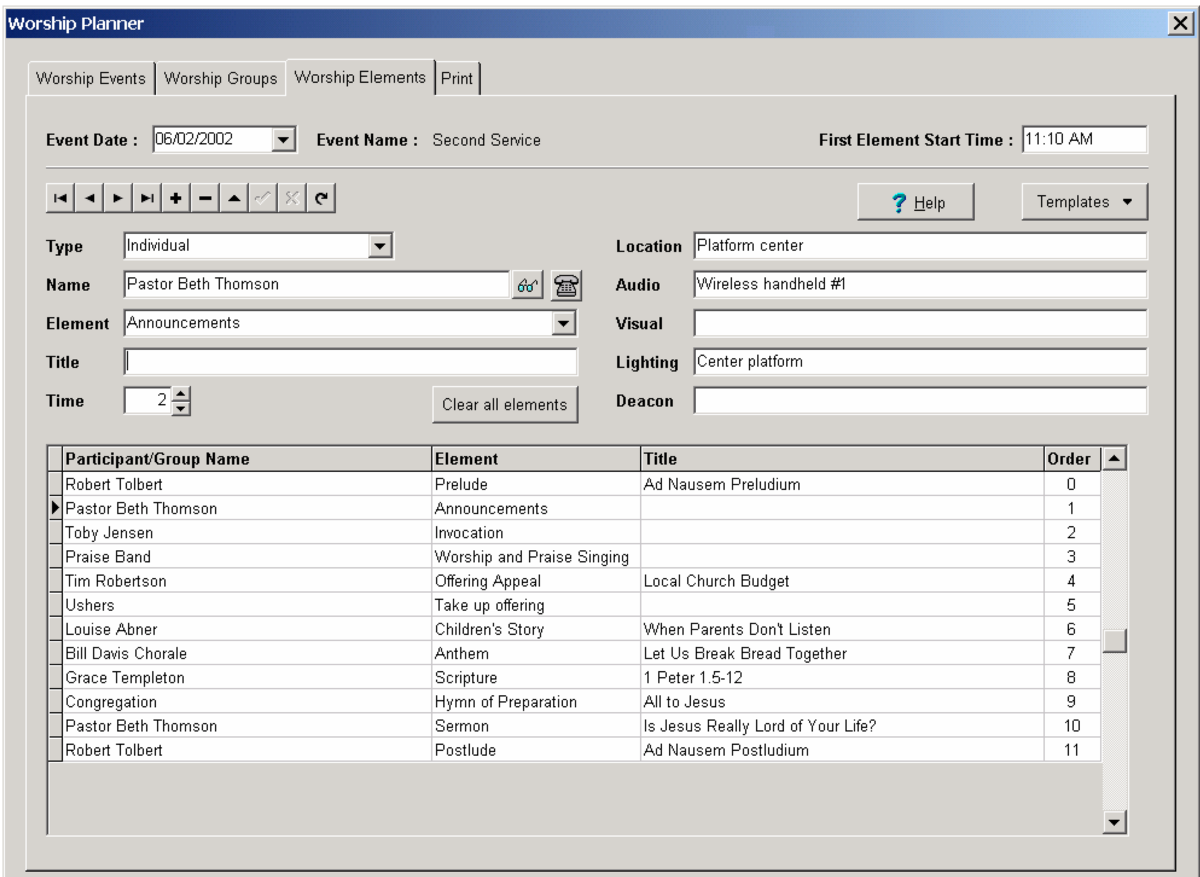


Once the event has been selected, then you can click the + button on the navigation bar for the Praise/ Worship team members to add members for that week. After selecting the name from the Name Search dialog that appears, select their position from the drop-down list. Items such as Leader, Vocals, Instrumentalist, Keyboards, Guitar, etc may be chosen.

If you select names from your church's data file, the phone number fields will be filled in automatically from phone numbers saved in your data file.

Worship Elements

Once you have defined a worship event, defined any groups that will be used, and defined your praise team members, you are ready to define the elements that will be a part of the worship service. Click the Worship Elements page to do this.



The first decision is to select the worship event. Click the icon to open the edit box in the upper left corner of this page to see a list of worship event dates, titles, locations, and themes. Select the worship event for which you wish to enter elements from the list.

Press Tab to move to the field in the upper right corner of the tab page to enter the time the first element should start. This is different than the formal start time of the worship event. In many cases you may wish for prelude or preparation music to start ahead of the actual start time.

To enter elements, click the + button on the navigation bar. As you enter elements, they need not be entered in strict order at this point because you will be able to order them as needed later on.

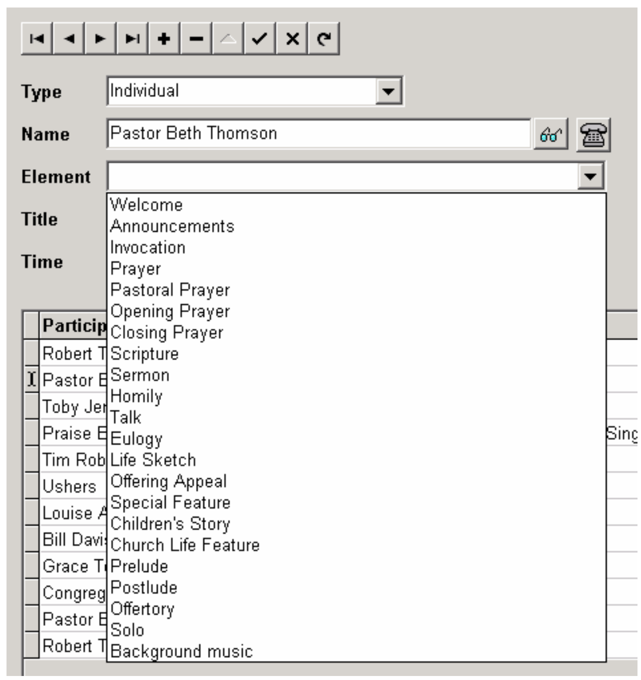
Type

There are three choices on the type menu: Individual, Group, or Congregation. Select Individual if the worship element you are now entering is going to be done or led by a person. Select Group if the element will be led or performed by a group. Select Congregation if it's something the congregation will do. This selection is important because it changes the way a number of controls function following it.

Individual

If you select Individual, then the two buttons at the right edge of the Name field are enabled. The first button, with a pair of glasses (for searching) will bring up the Name Search dialog in case the name is already in your CMD data file. If it's not, you can click the button with the Phone on it to manually enter the name and phone numbers of the individual.

The Element edit box's items are specific to the type of things an individual would do. You may select the element from this list, or you may type it in directly if the list of elements does not include the element that the individual will be doing. The illustration shows you the items from which you may choose.



Group

When Group is selected, the list of groups you have already defined will be presented so that you can select from it.

When you select a specific group, the items you entered for their Possible Responsibilities will populate the Elements list. You can select any item from that list, or you can type in the item directly.

Congregation

If you select Congregation, then the Elements list will present several possibilities that a congregation would do.

Name

As mentioned above under Individual, this field stores the name of the individual (or group) leading or performing a particular worship element. Most individuals will be selected from your CMD data file. For those names, click the icon to the right edge of the edit box to use the Name Search dialog to find the name. Use the icon with the Phone on it to enter a name and phone number for a person who is participating but who is not stored in your CMD file.

Element

This is the specific part of the worship event that the person, group, or congregation will be doing. Generic names or descriptions are fine here. There’s a separate field for Title for music, dramas, or sermons. You may wish to select the element from the drop-down list, or you may type it in directly.

Title

Use this field to enter a formal title for a song, anthem, drama, or sermon.

Time

Enter the estimated time for this element rounded to the nearest minute.

Location

Use this field to enter up to 40 characters for platform or stage directions.

Audio

Use this field to enter microphone or other audio information.

Visual

This field should track overhead projector needs, PowerPoint, etc.

Lighting

This field tracks what kind of lighting is needed for a given element.

Deacon

Use this field for deacons (or ushers) responsibilities such as opening or closing curtains, seating worshippers, dismissal, or other activities needed by this group during the worship event.

Clear All Elements

If you wish to clear out all elements in a worship event, click the Clear All Elements button.

Ordering Elements

A Order field is visible in the elements grid that you can use to strictly order the elements in your worship event. By default, the elements will stay in the order in which they were defined. However, most times you’ll find yourself needing to adjust the order as new items are added and others deleted as you perfect the elements in your worship event.

To order the elements, click in the Order field for the element you wish to order and enter a number that represents its place in the overall order. After entering the number, you can click into another element’s Order field and enter it. Notice that the order will be changed immediately when you click into a different cell.

You may find it easiest to count the total number of elements and then start entering the numbers in reverse order. That will make it easier to enter the other numbers since the elements won't be constantly swapping places if you start from the end of the order.

Templates

When you begin to use the worship planner heavily, you may discover that many of the elements and order of your regular services repeat from week to week. If this is the case, you may wish to define a template for worship that can be called up as a starting point each week.

The template file can store any number of templates, and will store most items that you enter in relationship to an element.

To save a template, first fill in all the worship elements that you wish to use. Except in cases where the same person plays the organ or piano or other instrument each week or preaches each week, most of the Name fields should be left blank as will the Title field. However, you can enter the Type, the Element, the Time, and any platform directions.

When you are ready to save the template, click the Templates button and select Save/Delete Template. Click the + button on the small dialog that appears, and enter the name for the template and then click the check mark button.

To delete a template, click the - button.

When you are ready to add a second template, don't just erase the title of the first template! That will just change the title and overwrite it with the elements that are currently in your grid! Always click + when you need to add a new template!

To use a template, first define the worship event as outlined earlier, select it here on the Worship Elements page, then click the Templates button and select Load a Template. You'll be shown a list of all the templates you've defined. Click on the one you wish to load and then click OK. All the elements of the template will be loaded to populate elements grid. You can then click on any element in the grid and then use the upper portion of the dialog to fill in the missing fields for each element.

Printing Worship Forms

Once you've defined the event and the elements, you can print some forms that will be useful to you. As this feature is more developed in the future, we're going to add some statistical reports and comparative reports so that you can stay on top of such things as how often songs are used and how often certain people participate in worship leading. For now, there are two output forms available.

Before you print an event, make sure that you have selected the correct worship event and date using the small grid to the right of the Output Forms selection box.

Event Flow Sheet

The event flow sheet prints all of the information about each element in a special columnar format. If the running time column which appears first is not accurate, go back to the Worship Event page and make sure that you have entered the correct start time, and then go back to the Worship Elements page and make sure that you've entered the correct time for the first element, and that you've entered a value in the Time field for each individual element.

This flow sheet is a valuable tool for those involved in the service. Since it gives platform, audio, lighting, and other directions, it can be used by the technical staff as well as the "up-front" participants.

The Personalized Flow sheet option will be enabled in the future.

Personnel

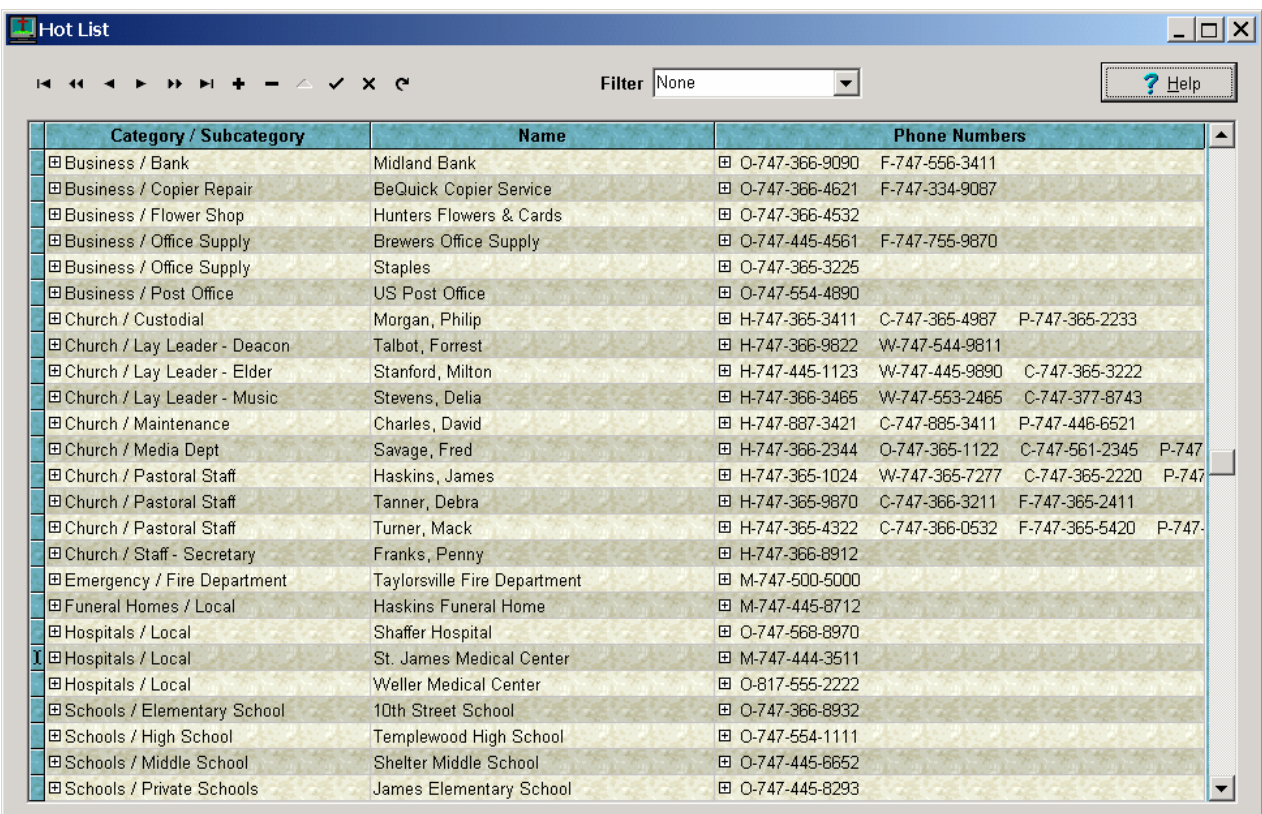
The Personnel form prints a list of all participants, including praise team members and group leaders. Phone numbers are provided as are blanks that can be checked by your church secretary or worship coordinator to make sure that the participants are confirmed and if they have received a reminder call late in the week. The check boxes allow you to determine who will be included in the list.

18
Hotlist

For anyone who uses (and often loses!) a call sheet listing important or frequently called phone numbers, **Hot List** will prove invaluable. Since it's always available when CMD is running, you won't ever have to worry about losing your call list again!

To access Hot List, select it from the **Tools Menu**, click the next-to-last speed button with the telephone on it, or click the telephone speed button on many of CMD's dialogs.

The Hot List dialog has three columns of information: a **Category/Subcategory column**, a **Name column**, and one for **Phone Numbers**. The list is ordered by Category & Subcategory, making it easy to quickly locate the type of contact you need to reach.



Category / Subcategory	Name	Phone Numbers
Business / Bank	Midland Bank	O-747-366-9090 F-747-556-3411
Business / Copier Repair	BeQuick Copier Service	O-747-366-4621 F-747-334-9087
Business / Flower Shop	Hunters Flowers & Cards	O-747-366-4532
Business / Office Supply	Brewers Office Supply	O-747-445-4561 F-747-755-9870
Business / Office Supply	Staples	O-747-365-3225
Business / Post Office	US Post Office	O-747-554-4890
Church / Custodial	Morgan, Philip	H-747-365-3411 C-747-365-4987 P-747-365-2233
Church / Lay Leader - Deacon	Talbot, Forrest	H-747-366-9822 W-747-544-9811
Church / Lay Leader - Elder	Stanford, Milton	H-747-445-1123 W-747-445-9890 C-747-365-3222
Church / Lay Leader - Music	Stevens, Delia	H-747-366-3465 W-747-553-2465 C-747-377-8743
Church / Maintenance	Charles, David	H-747-887-3421 C-747-885-3411 P-747-446-6521
Church / Media Dept	Savage, Fred	H-747-366-2344 O-747-365-1122 C-747-561-2345 P-747
Church / Pastoral Staff	Haskins, James	H-747-365-1024 W-747-365-7277 C-747-365-2220 P-747
Church / Pastoral Staff	Tanner, Debra	H-747-365-9870 C-747-366-3211 F-747-365-2411
Church / Pastoral Staff	Turner, Mack	H-747-365-4322 C-747-366-0532 F-747-365-5420 P-747-
Church / Staff - Secretary	Franks, Penny	H-747-366-8912
Emergency / Fire Department	Taylorsville Fire Department	M-747-500-5000
Funeral Homes / Local	Haskins Funeral Home	M-747-445-8712
Hospitals / Local	Shaffer Hospital	O-747-568-8970
Hospitals / Local	St. James Medical Center	M-747-444-3511
Hospitals / Local	Weller Medical Center	O-817-555-2222
Schools / Elementary School	10th Street School	O-747-366-8932
Schools / High School	Templewood High School	O-747-554-1111
Schools / Middle School	Shelter Middle School	O-747-445-6652
Schools / Private Schools	James Elementary School	O-747-445-8293

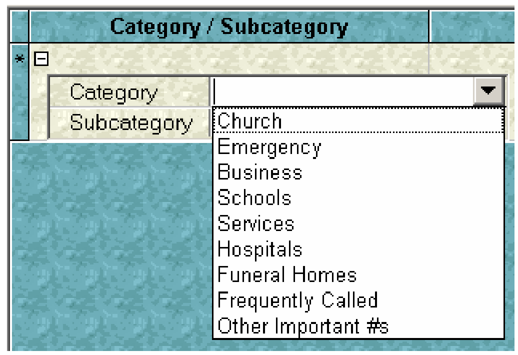
The **Navigation tool** in the upper left corner of the dialog provides the means to move around in the list of entries, add, edit or delete entries as needed.

The **Filter** combo box allows you select any category from the list, which causes Hot List to temporarily hide all Hot List entries that are not a part of the category you select.

The **Help** button provides access to the pop-up help topic dedicated to Hot List in case you forget how some of the commands or features work.

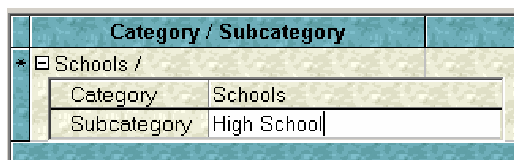
To add a new entry to your Hot List, click the small **+** icon in the navigation tool.

Category/Subcategory Fields



The Category/Subcategory field for each Hot List entry may be entered or edited by clicking the small + in the far left edge of the Category/Subcategory item. This opens up separate lines in the grid for the Category and the Subcategory. Click the drop-down arrow in the Category field to see the list of possible categories:

For the sake of example, we'll select Schools from the list. Then, we'll type in the words **High School** directly in the subcategory field.



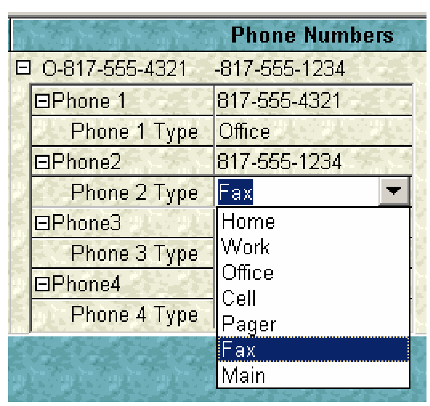
To move to the Name column, click directly in the Name column, and the Category/Subcategory box will close, and the cursor will be placed in the Name field for entry.

Name Field

When entering information in the Name field, you can either click the small ellipsis icon on the right edge of the Name field to pick from a list of individuals in your CMD data file, or you can just type in the Name directly.

In the example we are creating here, it's not likely that you list area High School names in your CMD data file, so we'll just type in the school's name, **Brentwood High School**. Press TAB to move to the Phone Numbers column.

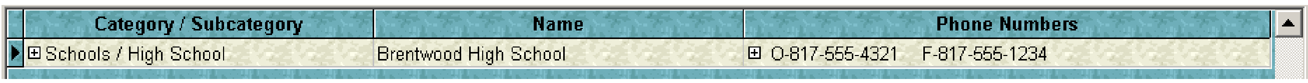
Phone Numbers Field



To enter phone numbers, click the small **+** at the left edge of the Phone Numbers field, and the grid will once again open up to allow you to enter information, this time for up to 4 phone numbers. In our example, we've entered the Office number and we are about to define the 2nd phone number we've entered as a **Fax** number.

When the phone entry is completed, click the check mark icon in the navigation tool to save the entire Hot List entry. This closes up the Phone entry fields, making the entire Hot List entry visible.

Note that the phone numbers are listed with a one letter abbreviation to denote which type of phone numbers are available for the Hot List entry:



One important note regarding phone numbers. Since you may define up to 4 phone numbers for each Hot List entry, it’s possible that the list of numbers will not fit completely within the grid boundary. This will be most likely in cases where you include an area code with each number.

If the list of phone numbers does exceed the boundary of the grid, simply move your mouse pointer over the Phone Numbers column for such an entry, and a pop-up hint will display the entire length of the list of phone numbers.

Hot List’s Future

As with many of CMD’s new features, Hot List will greatly benefit from your feedback as you use it. Your suggestions will help shape and season Hot List over the coming months if you will share your ideas with us on how it can be improved. We’ll look forward to hearing from you about your experiences with it!

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19
Utilities

Think of the **Utilities Menu** as a tool box for CMD, providing solutions and tools to address a number of different situations:

- A means to quickly add names to a menu field
- Converting names with one area code to another area code
- Preparing names for CASS certification (for a discount over regular bulk mailing)
- Conversion of old CMD data
- Recovering from problems with your data
- Globally changing data in some fields
- Import data from CMD 2001 or CMD 2002/2003 format data
- Setting the Member Household field globally
- Scanning your data file to see which menu field items have been used
- Setting up pictures for a pictorial directory
- Printing a sheet of return address labels, or a sheet of addresses for just one name
- Checking your menus for apostrophes
- Zip Code inspection

Many of the utilities are convenience features which have been included over time in response to specific user needs. If you have some specific need to use, edit, or maintain data which is not covered by these utilities, items on the Tools Menu, or other CMD functions, please make contact with us to explain your need. Perhaps your suggestion may find its way into a future edition's Utilities Menu.

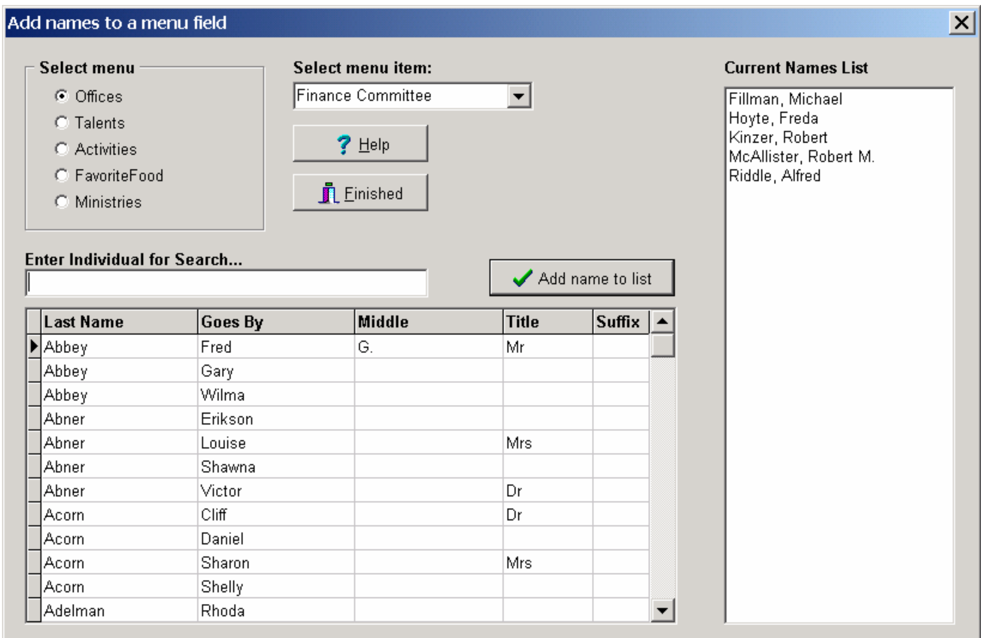
The items on the Utilities Menu are distinct from the items on the **Tools Menu** in that the items on the utilities menu lend themselves more to either diagnosing or fixing data, or to entering data in ways that are more quickly or efficiently done than in other parts of the CMD.

In contrast, the items on the Tools Menu are almost like subsystems within CMD—that is, they provide a whole set of enhanced features by extending data fields or providing additional functionality that works with the names you've already entered.

Explanations of all utilities are contained in this one chapter.

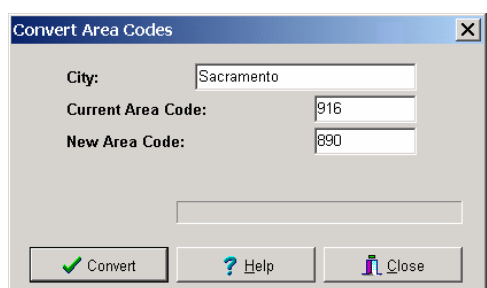
Add Names to a Menu Field

Although CMD's Enter/Modify/Delete Names dialog provides tools to update a name's choices from the various menu fields, the **Add Names to a Menu Field** utility is provided to make quick work of adding a number of people to the same menu field:



Start by clicking on the menu you wish to add names to in the **Select Menu** box. Then open the drop-down **Select Menu Item** combo box to select the actual menu choice to which you wish to add names. Then use the Name Search tools provided to highlight any number of names that you wish to mark for the item. Click the **Add Name to List** button when you have located the name you wish to add. The list of current names assigned to the menu choice is displayed on the right side of the dialog for reference if needed.

Area Code Convert



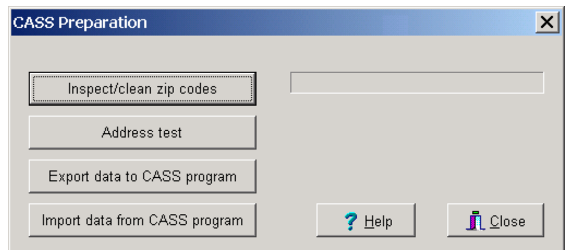
When an area code changes to a new one, you don't have to convert each name's area codes in each of their phone numbers one by one. This utility will make quick work of it for you.

The **Convert Area Codes** dialog allows you to enter the old area code and then the new one. If only some parts of an area code are converted, you can also enter a city where the change is to take place. This way only area codes within the city you enter will be changed. Click the **Convert** button, and the old area codes will be entirely converted in just a few seconds.

CASS Preparation

This utility need only be used if you are preparing to send your data to Software for Ministry for **CASS certification** for bulk mailing using **bar codes**. There are only two steps that you should take in preparing your list:

Inspect/Clean Zip Codes



When you click this button, CMD scans your data files searching for zip codes that are not 5 or 10 characters in length. Any such zip code found will be displayed on your screen. You should ignore all non-US zip codes, but US zip codes should *only* be 5 or 10 characters (Zip + 4 plus the "-" character) in length. Edit as necessary and click the button to Save when you've edited the zip code.

Address Test

The Address Test scan searches for and displays addresses which use both address lines. When such an address comes up, **make sure that the actual delivery address is on the second line if both lines are used**. Here is an example of a valid 2-line address:

Hillcrest Nursing Home
4321 Home Ave

Addresses like this are not valid:

4321 Home Ave
Apt #13

Each address line has a 40 character limit, so you can enter most addresses in their complete form on one line. The address example above should be edited to read:

4321 Home Ave Apt #13

Once you have completed these two steps, you are ready to send your data to Software for Ministry for CASS correction if you have signed up for this service.

When is CASS Service Appropriate?

Non-profit organizations can mail in bulk form for a lower rate than first class postage. You qualify for standard bulk mailing rates when you can mail 200 or more of the same item in your mailing.

CASS certification is the USPS requirement in order to send bulk mail with Post Net bar codes, generating a savings of 5 cents per piece *above the savings already given for bulk mailing*. Software for Ministry provides this service for its users for a nominal fee. If you regularly mail 275 pieces per month or more, using bar codes will save you money. Call us for more information.

Check for Orphaned Names/Families

This utility scans your data files to see if there are any families for which no individuals have been added, and for individuals who are not properly connected to a family unit.

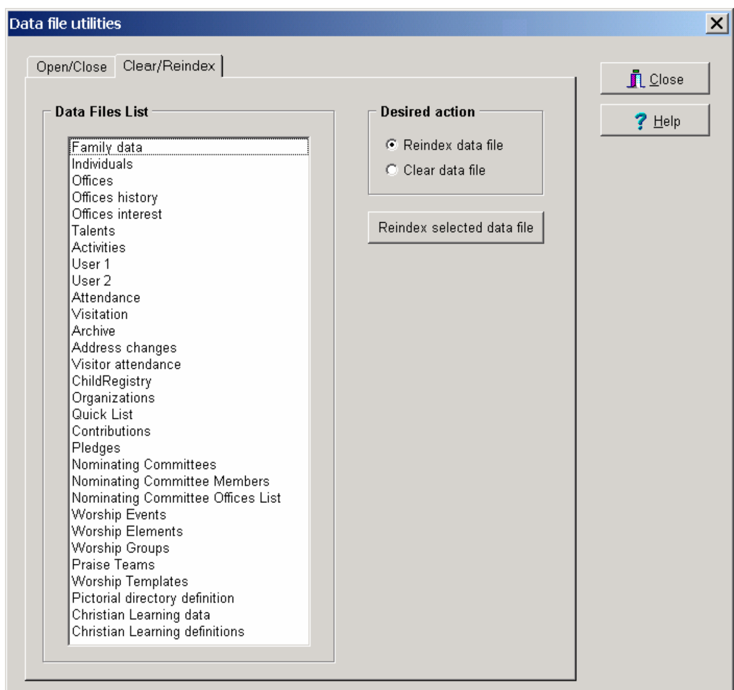
If any families show up when you click Check Families, you should go to the family record for each family name that appears on the list in Enter/Modify/Delete Names and define at least one individual for the family. Each family should have at least one family member defined for it!

If names appear when the Check Individuals scan is done, you will need to either reassign each name to a current family, or create a new family unit if necessary and then use the Add New Family Member button to reassign the orphaned name to the new family.

Even if your goal is to delete the orphaned name, you will need to reassign the name to a valid family and then delete the name using the normal delete function on the Enter/Modify/Delete Names dialog.

Generally orphaned names is a hold-over problem from CMD 2001 or early CMD 2002 programs. Once they are cleared up in your current file, you should have no future problem with them.

Data File Utilities

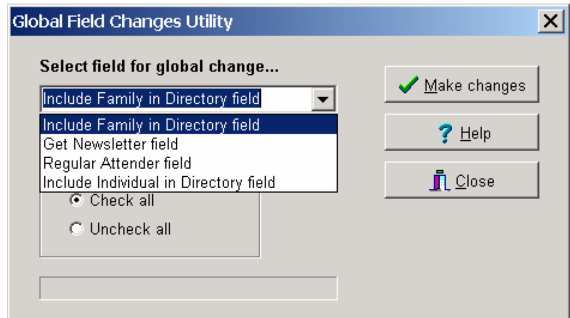


The Data File Utilities dialog is used to manually open or close a CMD data file, to re-index, or to clear a CMD data file when needed. This utility rarely needs to be used, and **we suggest that you use it only on instruction directly from us.**

When you use the Clear/Re-index page, you'll notice a list of the data files in a list box on the left side of the page. Click on the file you'd like to re-index or clear, click the radio button to its right for the desired action, then click the button to initiate the action.

We strongly recommend that you backup your data BEFORE using this utility in case we need to help you recover from a mistake you didn't intend to make!

Global Field Changes



The **Global Field Changes** selection on the Utilities Menu allows you to set or clear the four fields shown on the drop-down list for every name or family in your data file in one operation.

Select the item, select the action desired (check or uncheck all) and then click the Make Changes button.

Global Menu Field Changes

The **Global Menu Field Changes** item on the Utilities Menu allows you to change or remove items from your names' menu-oriented fields in a single operation. **There is no undo to this utility, so make sure you really wish to make the changes before you initiate action**. To fully protect you from accidental changes or changes you wish you hadn't made, we suggest that you make a backup of your data before you use this utility.

When you select this utility, you'll see the dialog on page 160. There are three columns, each providing a different action on menu fields.

Replace Data in Menu Field

Use the first column labeled **Replace Data in Menu Field** if you want to reword or replace a menu item with another one. For example, perhaps you want to change the designation "Shut-In" with "Homebound" in your Membership Status field.

To do this, you'd click on Membership Status as the menu field you want to process, find the word Shut-in in the **Find** drop-down list, and then either type in or enter the word Homebound in the **Replace With** box. Click the **Replace Data button**, and all names with Shut-in recorded in their Membership Status field will be replaced with Homebound.

This may also be useful when graduating people from one SS Class/Div to another.

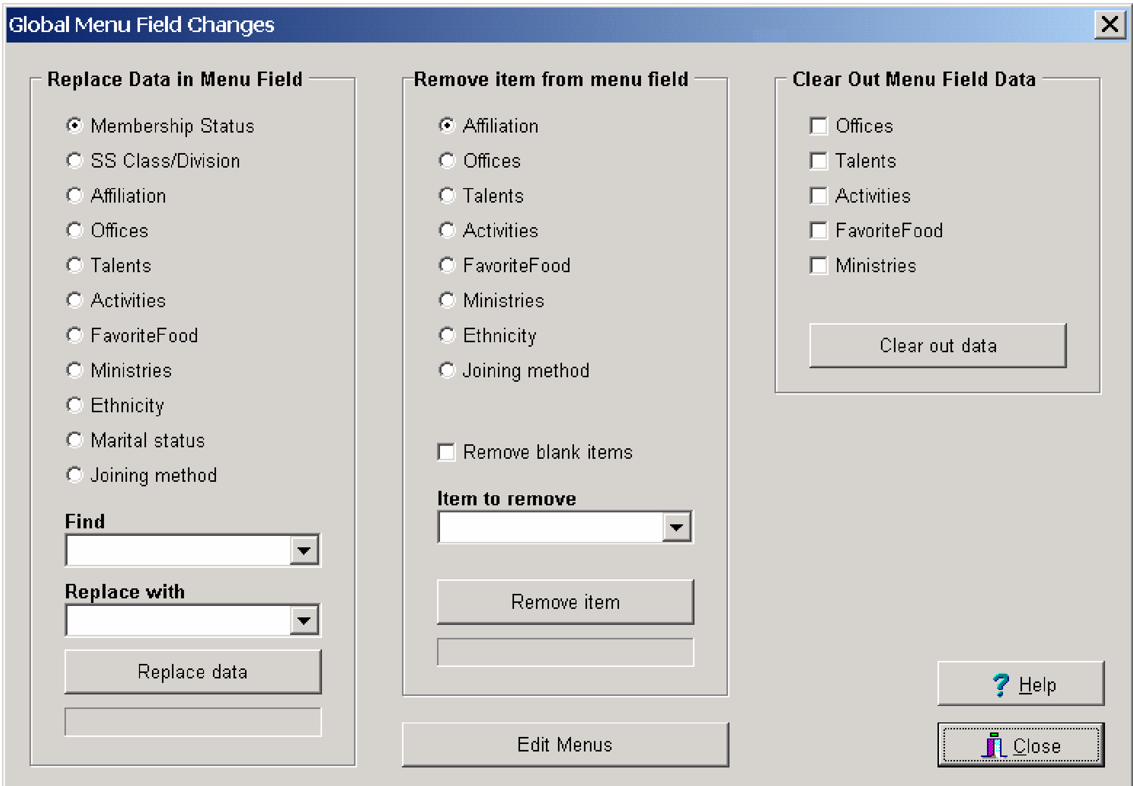
Remove Item from Menu Field

This option, located in the center column of the dialog, allows you to remove a menu item entirely. Note that there are some fields which require a choice, such as Membership Status or SS Class/Div, so they are not on the list of options.

Select the menu you wish to process, find the item you wish to have removed in your names' data file or type it in, then click the **Remove Item button**.

Clear Out Menu Field Data

The option in the right-most column allows you to clear out the entire contents of a few of the menu fields in one operation. There is no undo here, so use this one carefully!



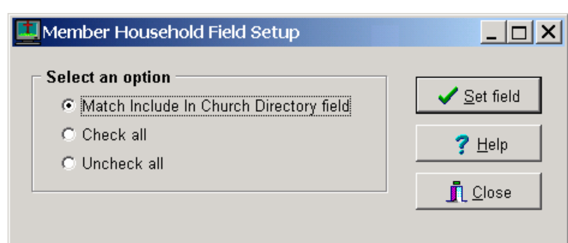
Check the menu(s) you wish to clear out. When you click the **Clear Out Data button**, all the menu choices saved for each selected menu for *each name* in your data file will be cleared.

Import Prior CMD Data

Import/conversion utilities are provided to enable users of prior versions of CMD to import their data into CMD 2006. Instructions for importing are discussed in detail starting on page 7. If you would like to import data from a *non-CMD* data base, contact us directly to discuss the options available.

Member Household Setup

The **Member Household Setup** item on the Utilities Menu allows you to quickly generate a default setting in your data for the Member Household field based on the criteria you select. You can make the setting for this field match the Include in Church Directory field, check all, or uncheck all. Click **Set Field** when you've made your choice.



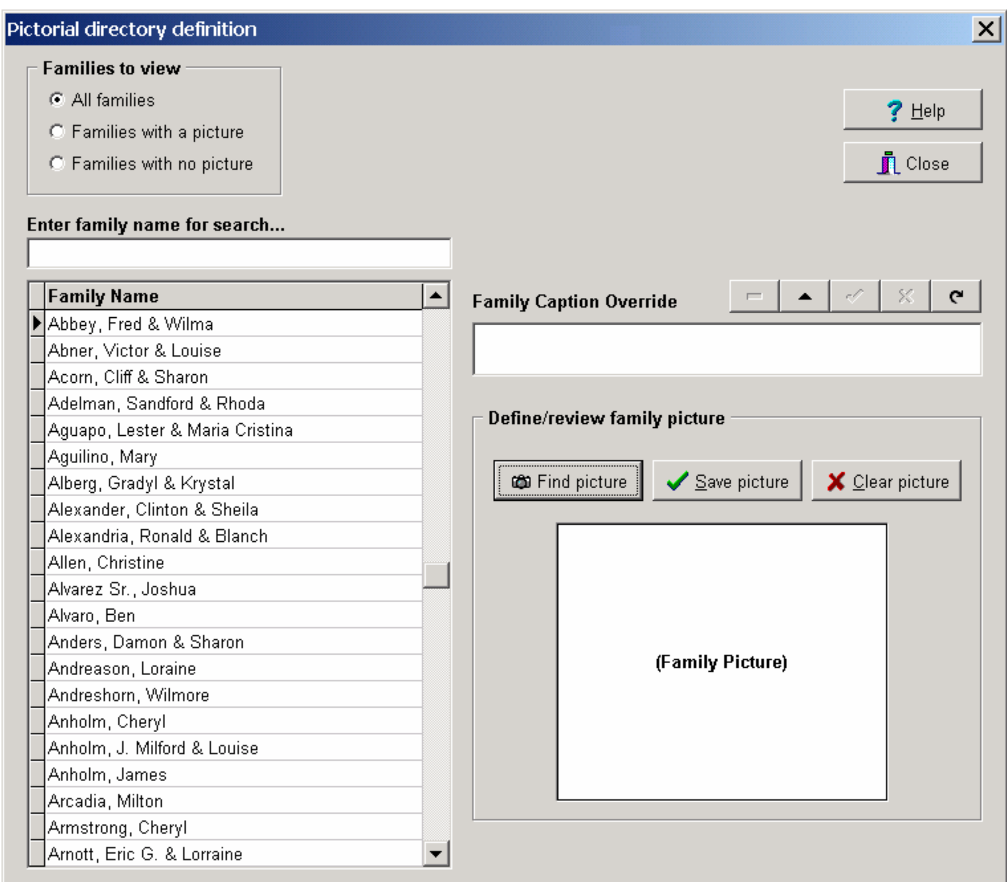
Menu Scans

The **Menu Scans** utility is designed to scan the names in your file to see which menu choices have actually been saved in one or more names' data file. Select the menu field from the drop-down list then click the Scan button. Your data file will be searched, and each choice on the menu that has been saved in any name's data record in you data file will be listed.

Pictorial Directory Definition

CMD can print a church directory in a variety of formats, including a **pictorial directory**. In order to do this, you'll need to first attach a picture of each family to their CMD data record. You can do this either on the Enter/Modify/Delete Names dialog (see page 35), or you can use a special feature on the Utilities Menu called **Pictorial Directory Definition**. If you need to attach pictures to a number of families, this dialog will be faster than using the tool on Enter/Modify/Delete Names.

In addition, the **Pictorial Directory Definition** dialog provides a place for you to manually enter name text for the pictorial directory output options that will override the automatic formatting done by the program. The dialog is shown below.



Families To View

To make your work easier, the dialog provides a set of radio buttons you can select that will either show you all families in your list, only those families with pictures already attached, or those families with no pictures attached. Select the option that meets your needs.

Attaching or Viewing a Picture

To attach or view a picture, first use the Name Search tools provided to find the family you need to work with and highlight it.

If a picture is already attached for the highlighted family, it will be displayed in the picture area. The area will remain blank if a picture has not been attached.

To attach a picture, click the **Find Picture** button. A search dialog will appear that will allow you to navigate to a picture file. Click on the file name of the picture you wish to attach. A thumbnail of the picture you selected will be displayed on the right side of the Open dialog. Once you are sure you have highlighted the picture you wish to import, click the **Open** button. Once back at the Pictorial Directory Definition dialog, click **Save Picture** if you are sure this is the one you wish to attach to the highlighted family.

Note that you can also clear an attached picture by clicking the **Clear Picture** button when the picture you wish to clear is displayed.

Picture Format & Dimensions

It is *critical* that you use CMD's specifications for the pictures' size, resolution, and format. These are discussed on pages 21-22. **Failure to adhere to our specs will almost guarantee that you will experience problems!**

Family Caption Override

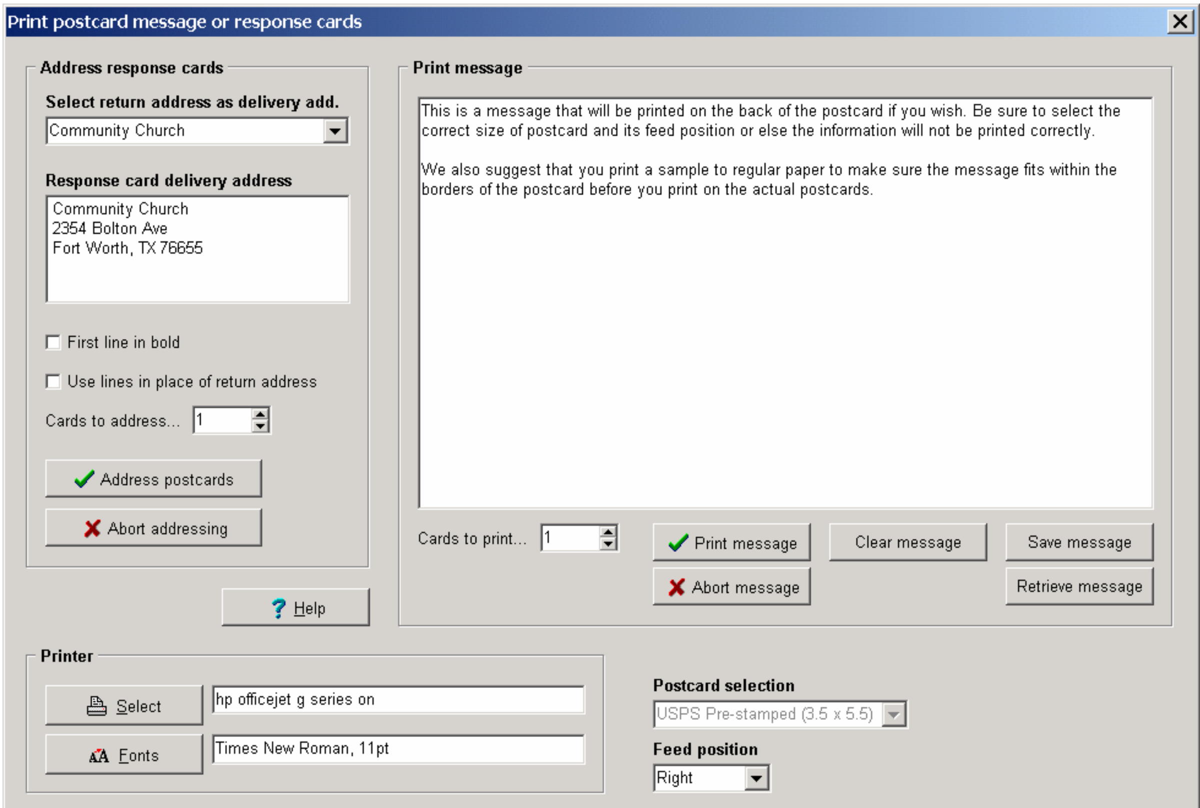
To manually enter text for the family name that will override the name that CMD will compose for you, find and highlight the family name using the Name Search tools. Once the family is highlighted for which you wish to define name text, click in the **Family Caption Override** edit box. You may enter up to two lines of text. If there are children in the family, you must enter them here as well. Overriding any part of the name overrides all of it, so you'll need to enter all the names of the family in this text area.

When you are finished entering the text, click the check mark icon of the navigation bar located just on top of the **Family Caption Override** edit box.

Find and highlight other families and enter their family text as needed.

Print Postcard Message or Response Cards

This utility allows you to create generic response postcards or print a message on the back of post-cards that CMD addresses in Print Names. Using this utility might be easier than trying to write the message in your word processor and trying to match the print layout to the postcard dimensions.



Addressing Response Cards

There are two print functions on this page. The upper left corner box labeled Address Response Cards is designed to be used when you wish to print a whole batch of postcards with a single delivery address. Either type in the delivery address directly, or select one of the return addresses that you have defined for your church from the drop-down list.

You can elect to print the first line in bold, have it put lines where the return address goes, and determine the number of cards to print.

You'll also need to make sure you have selected the correct printer and feed position. 2006.1 only prints to USPS Pre-stamped postcards at this time.

When you are ready to print the cards, click the Address Postcards button.

We highly recommend that you print one or two samples on regular paper first to make sure the address will line up properly before printing directly on the card stock in case you have to change the feed position or some other parameter.

Printing a Postcard Message

The Print Message box allows you to compose a message that can be printed on the back of the postcard. Note that this box is not intended to be a word processor, and no controls for margins or page length are included. You will need to compose your message and then print a sample on regular paper stock and visually check to make sure your text fits on the card. You may need to make some adjustments in the text before you print the actual cards.

Note that you can save or retrieve messages if there are messages you will use more than once.

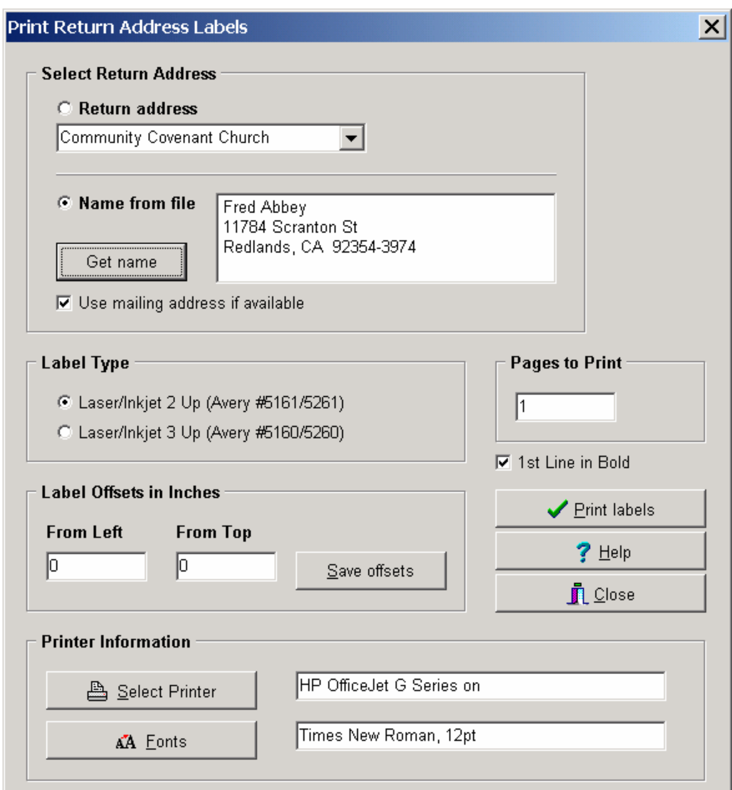
Be sure to set the number of cards you wish to print before you click the Print Message button.

Print Return Address Labels

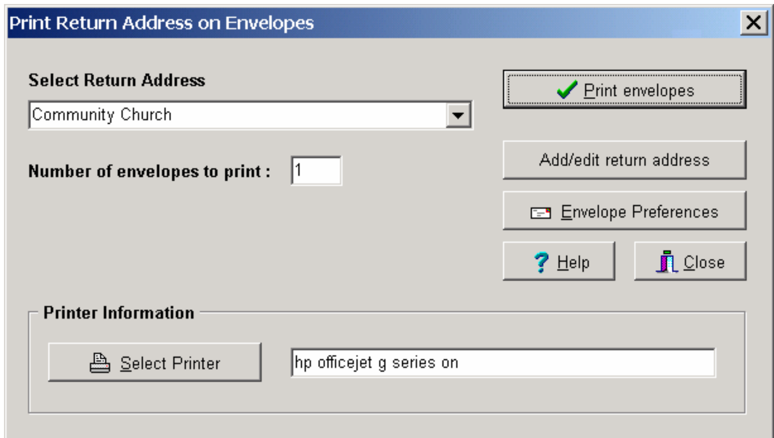
Provided as a convenience, the **Print Return Address Labels** dialog allows you to print sheets of return address labels for any address defined in any of the three permanent return addresses, as well as a name from your CMD data file, or even a name and address you manually type in.

You can select label size, the number of pages to print, whether or not the first line will be printed in bold, and printer/font information.

Click the **Return Address** button if you wish to select a return address from the drop-down list. Click the **Name From File** button if you wish to click the **Get Name** button to find a name in your CMD data file, or just type in the name and address manually. Click **Print Labels** when you are ready.



Print Return Address on Envelopes

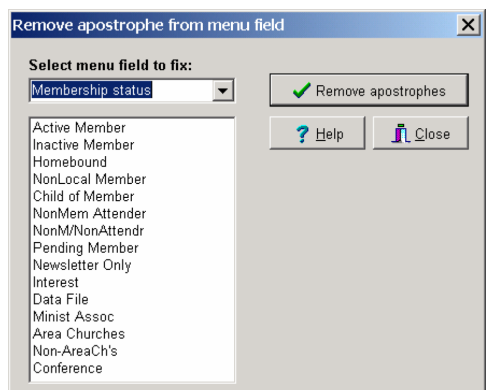


The Print Return Address on Envelopes Utility provides an easy way to print a return address on blank envelope stock.

To use this utility, select the return address you wish to print from the drop-down list, the number of envelopes you wish to print, and click Print Envelopes.

The envelope preferences already defined in CMD are in effect here. If you need to change them, click the Envelope Preferences button. If you need to add or edit a return address, click the Add/Edit Return Address button. Make sure you've selected the correct printer before you start as well.

Remove Apostrophe from Menu Fields



This utility checks a menu field for an apostrophe character in the menu items list and removes it. Apostrophes can sometimes thwart the filtering process used in some places in CMD, so we recommend that you don't use them. Select the menu field to check then click **Remove Apostrophes**.

Zip Code Inspect/Clean

Use this utility to scan your file and search for any suspicious zip codes (US zip codes only). If a zip code other than a 5 or 10 digit zip code is found, the name and the suspicious zip code will be listed. Go into Enter/Modify/Delete Names and call up any names which appear here and inspect their zip code. Even if it looks correct, click into the field with your mouse pointer and check for errant blank spaces. See the on-line help topic for more information.

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20
Preferences

Have it Your Way

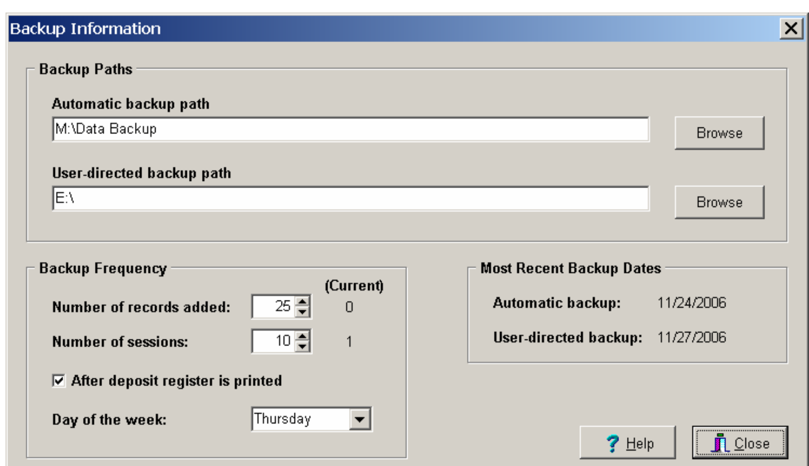
While many of CMD's fields and features are pre-defined, there are many fields, items, and functions *you* can customize to help make CMD best suit your ministry situation. The **Preferences Menu** provides the means to tailor these items as your needs dictate. CMD's on-line help may have additional information about specific preferences.

Backup Information

To help make regular backups as painless as possible, CMD 2006 includes a Backup Information Preference to allow you to set automatic backups, and user-definable triggers to put up reminders for backing up when you exit CMD.

The **Backup Information dialog** does not perform the backup itself, it only controls when you are prompted to create one. The screen shot below will illustrate each of the backup information options.

- **Automatic Backup Path**. This edit box is designed to hold a path that will receive the automatic backups that will be made every two weeks (or the next date you use your computer after two weeks have elapsed since your last backup). You do not have the option of turning off automatic backups. Your only option is to determine where they will go. Click the Browse button to find a drive/folder (including on your network) to which the data will be backed up.
- **User-Directed Backup Path**. Use this edit box to enter a default path that you generally use for your manual backups.
- Backup Frequency. There are 4 controls



that you may set that will cause a backup reminder to pop up on your screen when you exit CMD. You can determine the number of names which can be entered before the reminder is triggered, the number of sessions using CMD before the reminder is triggered, whether it should happen after a deposit register is printed, or on a given day of the week. Use any or all of them as appropriate for your needs. **But do use at least one or two of them!**

- **Most Recent Backup Dates**. A visual reminder of the last time your data was backed up.

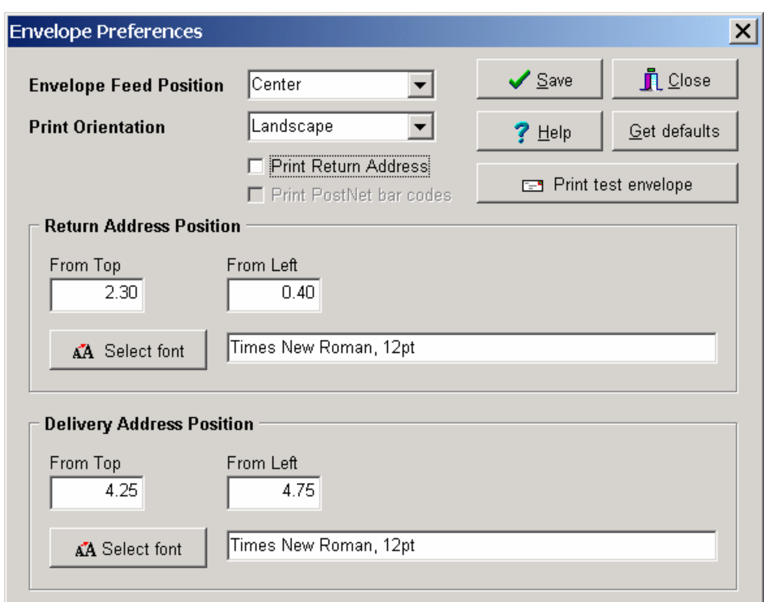
Special Note: Do not depend solely on the automatic backups for your data! They are there as a special reserve, but should not be considered your primary source for backups. If your entire hard disk is lost or you experience other problems, you may not be able to retrieve this data! It is only in place to provide one additional source of backup, not your only source!

Envelope Definition

To tell CMD about the way your printer prints envelopes, select the **Envelope Preferences** item on the Preferences Menu. The Envelope Preferences dialog allows you to determine if the envelope is printed to the left, in the center, or to the right of your printer's paper feed mechanism. You can also adjust the orientation to be either landscape or portrait. You can also select the actual position from the left edge of the printer feed mechanism where the return address and delivery address starts, where it starts from the side edge of the paper, and which fonts are to be used for the addresses.

If you generally do not need to print the return address because you have pre-addressed envelopes, you can uncheck the **Print Return Address** check box.

If you are unsure where to set the various values, especially the **From Top** and **From Left** values, start by selecting the **Feed Position** and try the defaults that appear with the selection that is correct for your printer. Make fine adjustments from there once you've printed some sample envelopes.

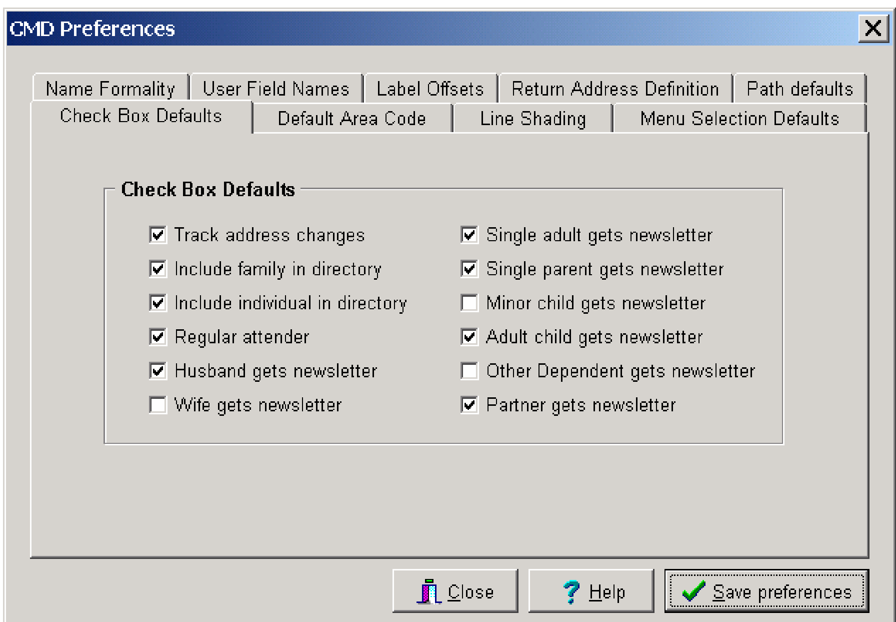


General Preferences

The **General Preferences** choice on the Preferences Menu calls us the General Preferences dialog, where many of CMD's preferences are set and stored. When it appears, you'll see a number of tab pages, each listing a different preference function. Click on the tab page to find the preference you wish to altar.

Check Box Preferences

This page gives 12 check box choices that appear either in the Family Data area or Individual Data area. When a new name or family is added, these items will be automatically set according to what you select here. Of course, you can override them as you enter a new family or family member, but you can set these to be what you generally expect names or families you enter to need. Check each box you wish to use as the default choice when first entering a name or family.



Default Area Code

Enter the area code for your locale. Entering a default area code causes the area code to be automatically entered when you first come into a phone field, and it allows you to mask out area codes on reports that include phone numbers if you wish.

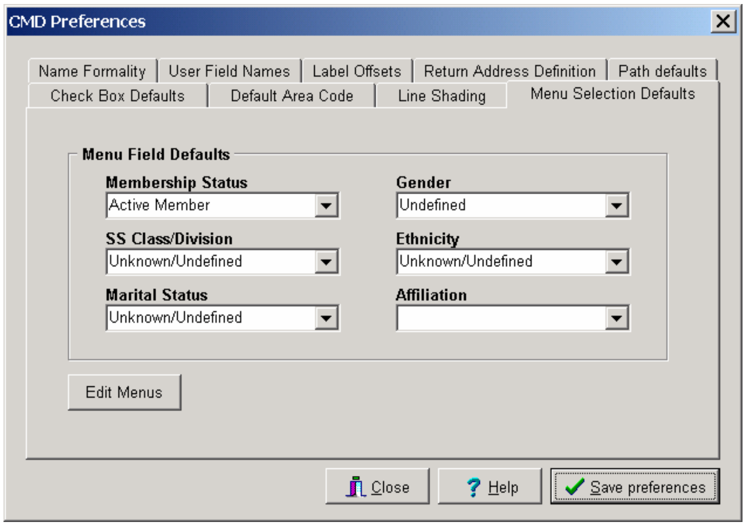
Line Shading

A few of CMD's reports incorporate shading to make the report more easily readable. If you wish to use line shading, enter a numeric value that represents the shading level you'd like. Most printers will look best with a value between 4 and 10.

Menu Selection Defaults

There are six single-choice menus for which default values can be specified when new names are entered. They are:

- Membership Status
- SS Class/Division
- Marital Status
- Gender
- Ethnicity (User 4)
- Affiliation



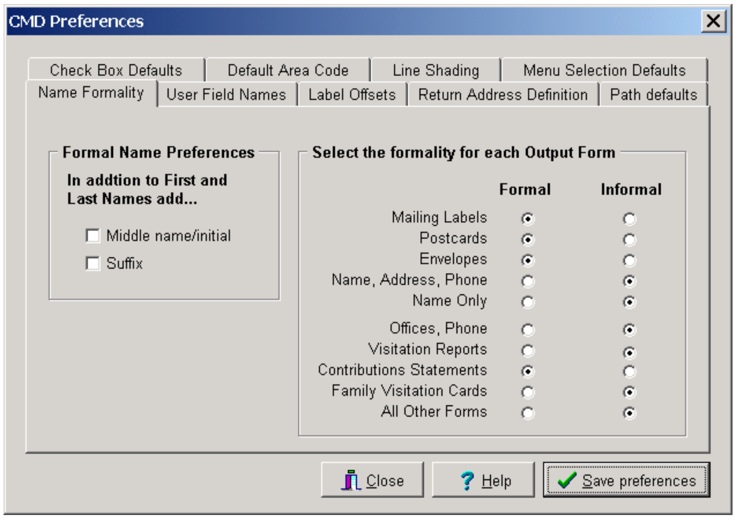
Select your default choice from the drop-down combo box for each menu.

Name Formality

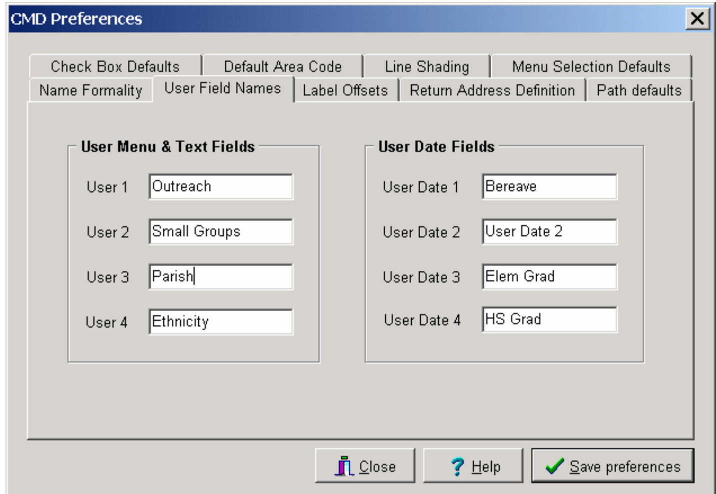
Reports can be printed using the more formal First Name or the more informal Goes By field. While you can manually select Formality type on the Print Control page of the Print Names dialog, you can set your general preference for many of the output forms on the Name Formality page of the General Preferences dialog to be automatic.

For those fields that you select to be printed with Formal name, you can also optionally select to include the Middle name or initial and the suffix.

Remember, there is an override function on name formality on the Print Control page. The choices made here set the initial choice on Print Control based on the output form you select.



User Field Names



CMD allows you to rename up to 8 of its fields - 4 general fields and 4 date fields. The names you give these fields appear on reports and on various dialogs where they are entered or updated.

To change the name of a user field, click in the edit box beside the user field and type **up to 12 characters** of any name you wish to use.

Label Offsets

Use the **Label Offsets** if your printer needs them to better align text when printing labels. Generally this will not be needed for most printers, but if yours needs it, enter adjustment values here, including negative values if needed.

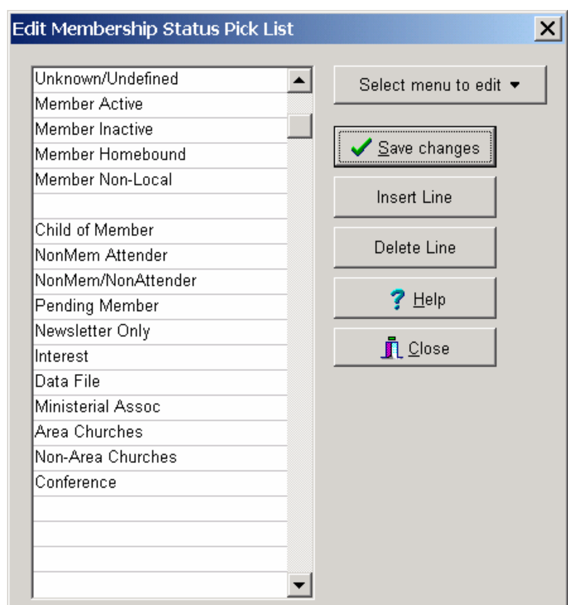
Return Address Definition

CMD allows you to define up to 3 return addresses which can be selected on the various print dialogs. Put the most generally used return address in Return Address 1, and add others as needed. Be sure to include the church name, address, city, state, and zip (or province and postal code).

Path Defaults

The Path Defaults page allows you to specify a default path for data backups and restores, and also for merge files. Find the path you wish to use and click the appropriate button to save it as a default.

Menu Items (pick lists)



The **Menu Items** dialog allows you to alter the contents of many of CMD's menu fields. In fact, all but two of them are fully user-definable.

To edit the choices in a menu field, select the menu you wish to alter by clicking the button labeled **Select Menu to Edit**. That menu will then be displayed in the list box.

Add, delete, or edit menu choices as needed.

Please note that changing the menu choices here does not alter the data already saved in your names' data files. It only changes what is listed when the menu appears. If you need to change the actual data saved in your names' data file to conform to a change in the way a menu item is spelled or written, you can use the **Global Menu Field Changes** item on the **Utilities Menu**. See page 159 for more information.

Members List

The **Members List** is a list of member-related choices you've defined on your Membership Status menu. Because there are likely to be many choices that are *not* members such as Child of Member, Non-Member Attender, Pending Member, etc, CMD has no way of knowing which items represent members unless you tell it who the members are. This is important for some of the reports that you will print.

To tell CMD which Membership Status items are members, click the Members List item on the Preferences Menu. Click the **Pick Items from List** button when you need to add to or remove from the list. **You'll need to come back to this item when you change member items on the Membership Status list.**

Startup Function

When selected, the **Startup Function** on the Preferences Menu allows you to set a specific CMD program dialog to automatically appear when you first enter CMD. You can also select None if you wish to have CMD appear with its blank screen instead of any of the available dialogs.

Change Passwords/User Administration

The Preferences Menu contains choices to allow any currently logged in user to change or set their password, and to give administrative users access to the User Administration dialog where users are created and their level of access defined. Since CMD's password protection system is described fully in Chapter 2 starting on page 11, we'll not duplicate the discussion here.

Speed Buttons

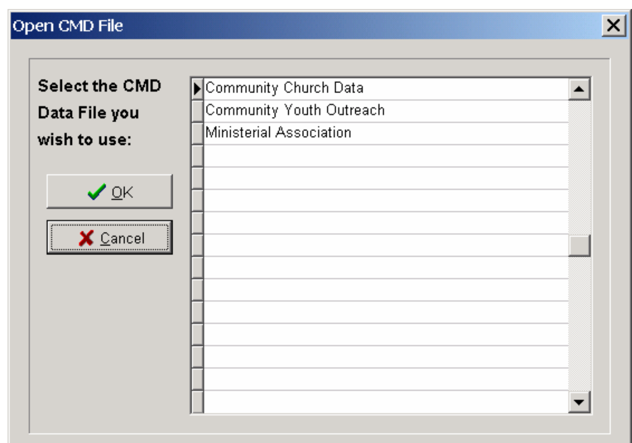
If you do not wish to use or see the **Speed Buttons** in CMD, click the last menu choice to either make them appear or disappear. What you select here will determine whether or not speed buttons will be visible in the other system modules which use them.

21
File, Find, & Help Menus

File Menu Items

The **File Menu** offers a number of choices that have to do with configuration, opening and closing data base files, backup & restore functions, and logging out. The File Menu also provides the means the exit from CMD entirely. A look at each File Menu choice specifically:

Open CMD File



CMD allows you to install multiple physically separate data files. The **Open CMD File** item on the **File Menu** allows you to open any of the installed data files for use.

When you select this option, a dialog listing each of the data files by their **File Description** will be displayed. Click on the data file you wish to open, and then click **OK**. You may also double-click directly on the file you wish to open.

Each data file uses its **own** set of passwords and user name security settings and preferences, so when a new file is opened, the preferences for that file will automatically be in force. This means that you can have completely different options on each of the menus, user field names, return addresses, and any other **Preferences Menu** item you wish to make unique for a given data file. Because the files are kept physically separate from each other, maintaining separate preferences happens automatically.

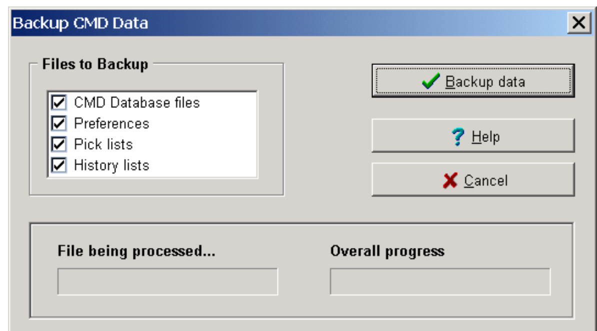
You may switch freely between data files to add, update, print, or any other system function as needed.

Backup Data

Backing up data is one of the **most critical habits** to form with any data-intensive software package, and CMD is no exception! The process is quite simple, and takes only a few minutes of your time. This small investment of time, however, may end up saving you hours of frustration and manual data re-entry should something ever go wrong with your computer, your hard disk, or your data. It's easy to restore CMD data if you have a backup. **Please take the time to learn to properly back up your data to avoid the serious downtime and repeated data entry which lost data will force upon you!**

To backup your data, place a blank, formatted floppy disk in your floppy drive, and click the **Backup Data option on the File Menu**. A dialog will appear listing the items you can select for a data backup. *We recommend that you accept the entire list for backup, though you can remove items from this list if you wish*.

Removing Files from the Backup File



If for some reason you do not wish to include all the elements of a CMD data base in a backup, you can uncheck any item on the list you wish to remove. The item that you uncheck will be removed from the backup list when the actual backup is made. However, you should rarely need to do this!!!

Once you're satisfied with the list of selected items, click the **Backup Data** button to proceed. A standard Windows Save dialog will appear. A default file name will be suggested for you as well as a default drive. Change any of the parameters you wish, though we do recommend that you keep the ".ZIP" extension since CMD's data backups produce industry-standard zip files.

When you click **OK**, your data will be compressed and sent to a single file on the floppy drive. It will be many times smaller than your actual data files. In many cases, the backup data will be only about 10% of the original size, so it will easily fit on most floppies.

Backup Frequency

We suggest that you make a backup daily, more often if you are entering or updating large amounts of data in one session. In addition, we recommend that you make a second backup at the end of every week, and then a third at the end of every month that is kept off-site. This should provide adequate protection in most cases.

Remember that you can set a default path for where backup files are placed if you wish to use something other than your A: drive. See page 167 for more information.

Backup Considerations

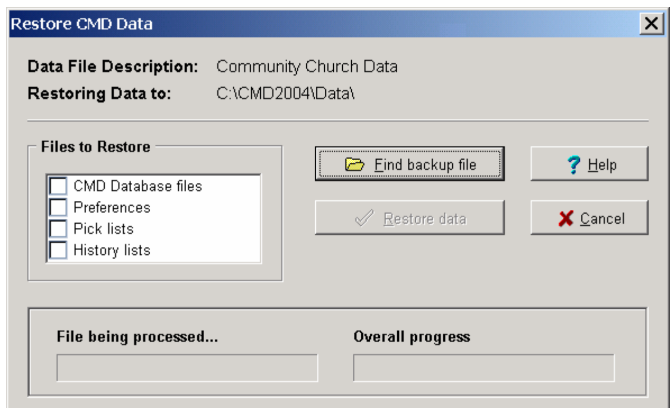
Two considerations are worth noting. First, **you must backup and restore all data from the database at one time**. In prior versions of CMD, you could select individual data files that could be backed up separately. However, since we have moved to a more secure password and security system, the data files that make up the actual data base must be backed up and restored together. The security features track changes in each data file, so the system "knows" when it sees a data file that is not in the exact condition in which it was last left. In such cases, it simply rejects the data as not being a part of the data base. Preferences, Pick Lists, and History Lists are *not* part of the actual data base itself, so these items can be selected/deselected as needed.

The second consideration has to do with the backup medium that you use. Bear in mind that you may not be able to back up your data onto a floppy disk if you use pictures in CMD. Since picture files are actually embedded in CMD's data structures, pictures can swell your data size quickly.

It will be up to you to make sure that you have a backup medium available that can hold the data you need to preserve. This might mean a Zip disk, a CD-RW (not CD-R), network attached storage, or a server onto which you can backup.

Whatever the requirements, make sure that you do not neglect to make backups!

Restore Data



Should you ever need to, you'll be thankful you can easily **restore your CMD data**! Clicking this **File Menu** option brings up the **Restore** dialog which allows you to bring back your data from a backup disk. The dialog displays the file description for the currently open data file, as well as the path for the data files. If you use only one data file with your CMD, you can just click the **Find Backup File** button.

However, if you have more than one data file installed in your CMD, make sure that you about to restore the data on the backup disk to the appropriate data file by **double-checking the file description and data files path**. If all are correct, then click the **Find Backup File** button.

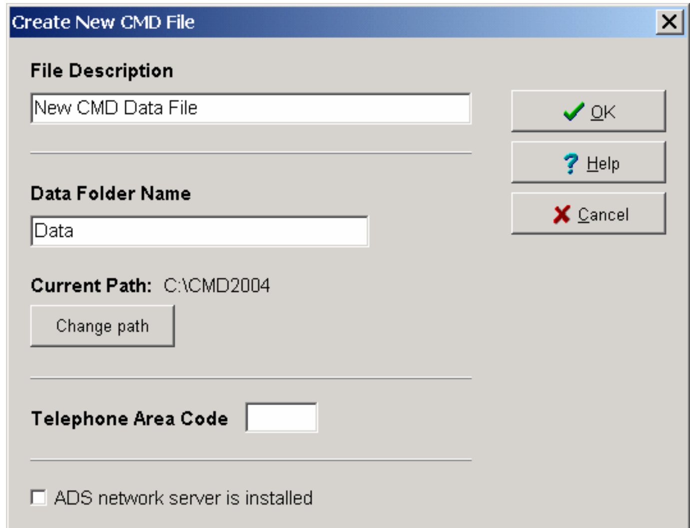
By default CMD will look for a zip file on Drive A unless you have set a different default destination. If you use a different drive letter, use the standard Windows controls provided to locate the data file to open. Once you've found it, click on the backup zip file itself and then click **OK** to return to the **Restore Data** dialog.

The backup file will be scanned, and any items from the **Files To Restore** list that are found in the backup will be checked. Uncheck any items you do not wish to restore.

In the screen grab of the Restore dialog above, the **Restore Data** button is not yet enabled. It becomes enabled only when a valid backup file is found using the steps described above. Once a valid backup file has been found, the check boxes will reflect the items in it that were found, and the Restore Data button is enabled. Click Restore Data when you are ready to restore the data in the data file on your computer.

When restore is finished, CMD will check to make sure that the user name and passwords you supplied to CMD when you logged in are valid with the data file that you just restored. If it is not, you'll be required to log in again before you can use the restored data. This protection keeps someone from accessing your data if they are not authorized to do so.

Create New CMD File



This option is used whenever you need to **create a CMD File**, whether you are just starting out using CMD, or whether you wish to add an entirely new CMD File to your system. You can install virtually any number of completely separate CMD Files with your CMD system.

When you click this option, the **Create New CMD File** dialog appears so that you can specify the file description and location for the data file. If this is your first use of CMD, you'll likely want to change the **Description**, but we recommend that you use the default **Data Folder Name** provided for you. See page 5 for more instructions on installing a CMD data file.

- **File Description**: This is simply a descriptive phrase which identifies your data. This is most important if you think you'll ever need to install additional data files sometime down the line, but it's still helpful even if you have only one. We suggest that you type in a word or phrase which will enable you to quickly and easily identify the data file you are using.
- **Data Folder Name:** This forms the **Data Files Path** for this data file. CMD keeps explicit track of where on your hard disk your data files reside so that it can always find them - important in an operating environment where you may have several different types of programs installed. If you are relatively sure you will only install one data file, at least for the foreseeable future, we recommend that you use the default name "DATA" which will be created under your CMD directory.

  If, however, you plan to install more than one file, for example in the case of a multi-church district, you may wish to install the major church in the district as the first data file you install, using some designation which will enable you to quickly identify which the directory which holds this church's data.

  While **we don't recommend creating CMD data files anywhere other than under the CMD2006 system directory**, you can do this if you wish (an example of when this might be useful is in the case of a network installation—see the next chapter for more information on network setup for CMD). If you need to navigate to a different folder under which to create the data folder, click the Change Path button to select the new folder name.
- **Telephone Area Code**. Enter the area code of your church. Having the area code makes data entry a bit smoother. You can change it later on the General Preferences dialog.
- If your church has purchased the **Advantage Database Server** software from us, check the **ADS Network Server is Installed** button before you click OK.

Click OK when you are finished to initiate data file creation. You'll be asked to log in when the new file is created using the default user name and password that are standard in CMD.

Configuration File

This menu choice offers five sub-options, each designed to let you view or modify your CMD data files configuration. These choices are different than the type of choices offered on the **Preferences Menu** in that these directly affect the location, description, and other items directly related to the data files themselves.

CMD's configuration files, named "CMD Configuration.ADT" and "CMD Configuration.ADI" reside in your CMD2006 directory, and store important information your system needs to know to operate.

View Configuration Info

This option brings up a small dialog which displays the configuration information stored in your Config.CMD file. This information can be used to confirm where your data files are located.

Reconstruct Config File

This option allows you to build a new configuration file without requiring you to go through the **Create New CMD File** option explained earlier in this chapter.

The primary difference is that in Create New CMD File, both the data files and configuration files are created from scratch, resetting all files to be completely empty until you begin to enter data again.

Reconstruct Configuration File, on the other hand, only reinitializes the CMD Configuration files in case they become lost or damaged, without clearing out your data files.

The **Reconstruct** option need *only* be used if you know you have actually saved data in your CMD, but a message telling you that no data is installed appears when you try to start CMD.

To use this option, you'll be shown a dialog which will allow you to enter a File Description, and drive/directory tools to locate exactly where your data files are. Use the Get Path button to find the folder where your data files are located. Select this folder, then click OK to reconstruct.

Include Another CMD File

Use this option if you have manually created a new data directory on your computer and have placed CMD 2006 format data files in it and wish for this installation of CMD to be able to access and use it. A dialog appears when you select this option and asks you to provide a Data File Description (especially important here to distinguish it from a data file set already installed for your CMD system), and directory search tools to find the directory where the data files are located. Navigate until you find the directory where the data is located, select it, then click **OK**.

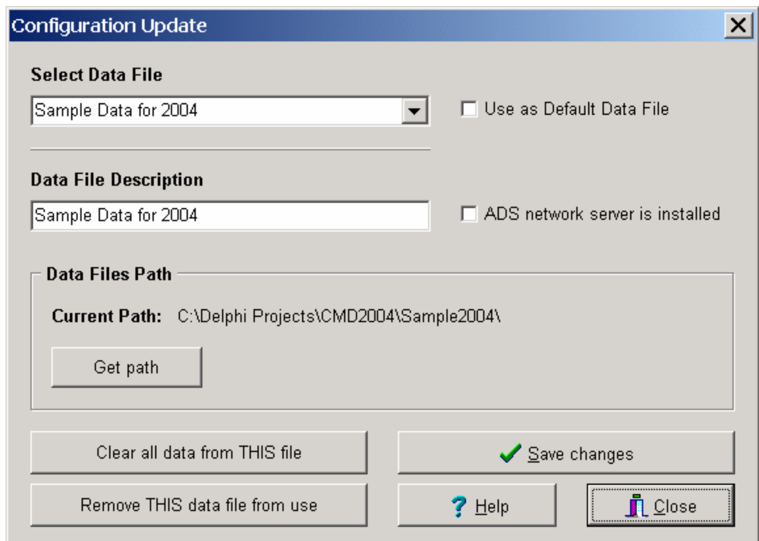
Once you have included another CMD file in your setup, you can access it along with any other CMD data files by selecting the **File|Open CMD File** option.

Enable Contributions

Click this option if you have purchased the optional Contributions Manager and have received the unlock code you will need to activate it. You will need to enable contributions for each computer on which CMD is installed if you wish to use it.

Even if you do *not* have the activation code, you may use Contrib except for the printing of statements if you wish to try it out before purchase.

Configuration Update



The **Configuration Update** dialog allows you to perform several important functions on your configuration. You may:

- Change the **Data File Description**
- Determine which data file will be the **default data file** , that is, the one that appears when you first start up CMD
- **Clear all data** from the selected data file
- Completely **remove a data file** set from your CMD setup
- Tell CMD that the ADS Network Server is installed

If you have more than one data file installed, you will need to first select the data file you wish to modify by using the **Select Data File** drop-down combo box.

Once the data file has been selected, you can modify the description simply by typing in a new one, changing the data directory by selecting a different one, designating the file as the default file, clearing, or removing the data completely. Click **Save Changes** once you've changed what you need to change.

Note that when you remove a data file, this does not erase the data and remove the actual data folder from your hard disk. It only removes any knowledge of it from your CMD Configuration file. You need to delete the unneeded data folder using Windows Explorer.

Logout

Use logout if you wish to keep CMD running but you need to be away from your desk for awhile and don't want anyone poking around the CMD looking at information they should not have access to. Clicking this option causes the login screen to appear, and no access to the data will be granted unless a valid user name and password are entered.

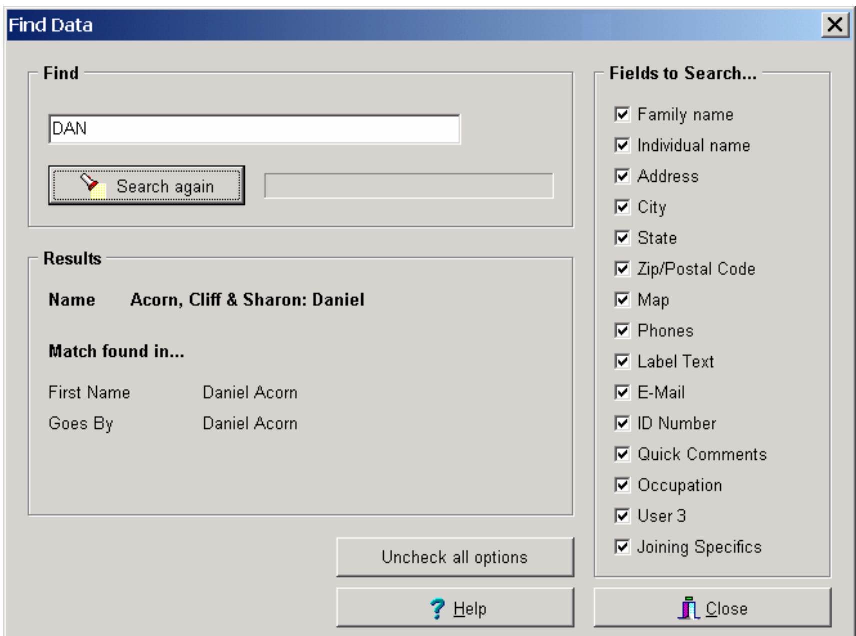
Exit

It is important to exit from CMD properly. Either exit through this File Menu Choice, or click the X box in the upper right corner of the main screen. Exiting through one of these means assures that any data files which have not yet been updated will be properly flushed and closed as CMD exits.

The Find Menu

The Find Menu in CMD has only one choice - a **Find** option that searches your data file for matches on words, numbers, or even just parts of a word or number.

When you click this one **Find Menu** option, you'll see the dialog shown below.



Enter the data you wish to search for in the blank provided, and then click the **Search** button. The file will be searched for the first match in the fields that you have checked in the column of fields on the right side of the dialog.

If a match is found, it will be displayed along with the field which contains the match. You can either abort the search at this point or continue searching more of your file. In the example above, we entered the word DAN and click the Search button (which was renamed Search again once a match was found). It displayed that the Acorn family had a person with DAN in their name, and it's shown above as well. If you wish to change your search criteria, click in the edit box and enter the new search characters and click the Search button again.

This command is most useful when you remember part of a person's name, address, or phone number and are trying to find them in the file.

Help Menu

In addition to this manual, CMD has **extensive on-line, context-sensitive help** which is available in most cases by **pressing F1** or by clicking the **Help** button on a dialog.

Clicking the **Help** button brings up specific help if you are in a small dialog, or a general help screen for the function you are in if you are presently working in a large, complex dialog such as Add Names or Print Names.

Pressing F1 brings up help for the specific item which has focus, that is, the combo box, edit box, check box, or other Windows control which you are working on right at the moment you press F1.

In addition to pressing F1 or clicking the Help button, you may also access help by selecting one of two items on the **Help Menu**:

- **Help Contents**. Click this item to get the contents page for the entire help file.
- **Search for Help On…** Click this item for an index to the topics in the help file.
- **About**. This option displays information about the particular version of CMD for Windows you are currently using.

22

Using CMD on a Network

CMD is designed to be **equally at home** on a single, stand-alone computer or on either a peer-to-peer or server-based network. CMD's license allows you to place it on as many clients as you have on your network without additional cost.

However, bear in mind that there will be some performance penalties due to things beyond CMD's control such as the speed of your network and switching equipment. However, any performance penalties are minimal compared with the convenience of having all users on your network share and work with the same data!

And since the password and security mechanisms in CMD are built into the data itself, all password and user name restrictions will be in force on any client on which CMD is installed.

We're going to detail **both peer-to-peer and server-based network setups** starting on the next page, but first we want to make sure that you hear about server software that is available that will provide greater stability and speed when using CMD on a network so that you can decide if it is appropriate for your setup.

Advantage Database Server Software

As we've said, you may freely add CMD to any number of clients on your network for no additional cost and that CMD works on a network right out of the box. However, if your CMD will be heavily used by a number of people or if the number of users regularly exceeds 3 to 4 users, you might wish to consider obtaining the Advantage Database Server software that works with the data engine inside CMD.

This server software adds additional layers of security and stability to a network setup by leaving more of the actual data work on the server (or on the peer hosting the data in the case of a peer-to-peer network) and sending requests and results across network wires rather than actual data (which stays on the server itself).

This adds a **layer of protection** in case of network problems, power outages, etc. It also **makes the CMD run faster** on a network since data access and results are controlled on the server instead of the individual client and because more of the work with the data is done in one place.

The server software may be purchased *only* through Software for Ministry, and is reasonably priced for most any church needed to expand into networking for your CMD. Contact us for the latest price information based on the versions of Windows you use and the number of computers you wish to connect. Fees are based on *concurrently connected* computers, so you will not have to buy a license for every computer in your network, just for a reasonable number that might be connected at one time.

We strongly recommend the server software if your network has more than 3 computers on it.

What We Can Do To Help

We provide instructions here on setting up CMD for peer-to-peer and server-based systems. However, we are not equipped to deal with your network issues relating to hardware and Windows setup. We cannot help you administrate your network, including helping you learn how to grant permissions and map network drives. If you are unable to do these things for yourself, you will need to secure local help for those issues. Our instructions assume that you have a working Windows network up and running, and that all computers are able to access the network properly.

It is not our place or intention to help you debug your network. We can only deal with CMD issues with a working, functional network. That said, let's get to specifics.

Peer-To-Peer Network Setup

If you plan to use CMD on a peer-to-peer network where one workstation will act as the host or server computer to hold the CMD data that the other computers will be sharing, you'll need to follow these instructions to get it setup.

It is assumed that you followed the general instructions on the startup sheet included with the software that enabled you to setup the CMD on the computer that will serve as the host. These instructions can also be found starting on page 4 of this manual. The rest of this section in Chapter 22 will tell you how to configure the rest of the computers on the network.

Further, it is assumed that you have a working peer-to-peer network, and that you have properly logged on to the network.

In general, there are two parts to enabling other computers on your peer-to-peer network to use CMD's data. There are some things you'll do on the host computer, and then on the client computers.

Host Computer

1. Once CMD has been installed and is working on the host computer, exit CMD entirely.

2. Open **Windows Explorer**, and right click with your mouse directly on the CMD's program folder. That will be c:\CMD2006 if you followed our defaults during installation.

3. After right clicking on the CMD2006 folder, select **Sharing** from the menu. <u>Make the CMD2006 folder sharable</u> (not the data folder under it), give others on your network Full access. Different versions of Windows use different methods to grant permissions and access. Refer to the instructions for your version of Windows.

Once all users have been granted full access and permissions, you are ready to install CMD on the clients (the other computers in your network who will use CMD data from the host computer).

The Clients

Instructions for installing on each client will be the same. You'll just need to repeat the steps below for each computer that should be able to use CMD.

1 **Map** a drive letter on the client computer to the **CMD2006 program folder** on the host computer on the network (not the data folder). Use a drive letter that can be used on each client for consistency. It will make the installation and maintenance later easier. If you skip this step, you won't be able to see the data folder on the host computer!

2 Move CMD from the Master CD to the first client's hard drive by locating the CMD2006.xSetup.Exe on the CMD Master CD. To find it, click Start, Run, Browse, and navigate to the CD's root folder. Click on the file, click Open, and then click OK when back at the Run dialog. This will start up the setup program.

3 When the setup program starts, use all the defaults suggested by the setup program. Just keep clicking Next as the setup program moves through its process.

4 When the setup program is finished, double-click the CMD 2006 icon that was placed on the client desktop during setup. When CMD first starts up, it will tell you that it could not find its Configuration files. **This is normal! However, do NOT create a new CMD file here since it has already been created on the host. So, click No at this point**.

5 Once the main CMD blank screen is visible, click File, Configuration, and then select <u>Reconstruct Configuration File</u>.

6 When the **Reconstruct** dialog appears, you'll see a field for **File Description**. Erase the stuff in the File Description field and enter a name or phrase by which this data file set will be known. Something like "Community Church 2006 CMD Data" is appropriate.

7 Also on the Reconstruct dialog, you'll see the current path. Instead of accepting the suggested path (which will probably be c:\CMD2006), we have to find the path to the data folder on the host computer. So, click the Get Path button and **navigate to the actual Data folder** on the host computer using the standard Windows Browse dialog. **Click directly on the Data folder** and then click OK to get back to the Create dialog.

8 **If you have the Advantage Data Base server software installed on your server, check the ADS Server box.**

9 Click **OK** to finish. This will create a new configuration file for the client computer that looks on the host computer for its data.

10 Immediately after creation you'll be asked to login. During setup, CMD automatically creates a default User Name of **admin** and a default Password of **password**. Enter these values in the proper login fields and click OK.

11 If your church has purchased the Contributions Manager either now or sometime before, your copy of the CMD Master CD will come with a sticker on it giving you the code to enable contributions. Click File, Configuration, **Enable Contributions**. When the Enable dialog appears, enter the code on the sticker and click OK.

A Few Notes

There are a few things to keep in mind about a peer-to-peer network.

- First, use the best and fastest computer in the bunch as the host.
- Second, this computer needs to be kept running pretty much all the time. You'll get errors on startup when clients try to get into CMD if the host computer is turned off.
- Be careful about limiting access to the host computer. Most damage is done NOT by people intending to do you harm, but rather by well-intentioned but unknowledgeable people who try to "help" you! Use the login and password requirements to control access to CMD.
- Make backups frequently since people can get into your computer and delete or move files, including CMD's data files. Keep at least one backup off site for extra security.

Setup CMD on a Network with a Server

If you have a computer configured to be a true server and not a client on the network, then you'll need to follow these instructions outlined here for setting up CMD.

Please note that we cannot assume responsibility for helping you administrate your network! We can only provide assistance for helping you get CMD going once your network is up and running. You'll have to get local help to make your data folder sharable, and to grant the permissions to each computer on the network that is to use the CMD's data.

If you have been using a prior version of CMD, **the very first thing you should do is to backup your current data** before you do anything else! Please don't skip this step! You might want to make a couple of them, just to make sure (use different floppies or CD's or whatever you use).

There are two general parts of the setup process for putting CMD on a server-based network. First, you need to prepare the server, and then you need to install CMD on each client.

Preparing the Server

1 Manually create a new folder on your server named CMDData or CMDDataFiles. Keep it simple, and *don't* include a year in the folder name (i.e. CMD2006Data). If you currently have a folder on the server for CMD that does *not* contain a specific year reference, then you don't need to create a folder at this time. You can use the current one.

2 If you created a new folder on the server, make it sharable, and give **Full access permissions** to all users on your network that should have access to CMD.

Installing CMD on a Client
Each client will have its own copy of the CMD program files. Installing the CMD on the *first* client is a slight bit different than what you'll do on the rest of the clients in the network. Once you've installed CMD on the first client and followed all the steps for it below, the order in which subsequent clients get installed doesn't matter. Note, however, that the process for installing CMD on subsequent clients differs from the installation for the first client.

All Clients:

If you created a new folder on the server for your data, you'll need to map a drive letter to that folder on each client. As you come to each client to install CMD, map the drive first **before** you begin the CMD installation process on each client, otherwise you won't have access to the data folder! We suggest that you use the same mapped drive letter for each client to make it easier to remember where the data is located.

First Client:

1 Move CMD from the Master CD to the first client's hard drive by locating the CMD2006.xSetup.Exe on the CMD Master CD. To find it, click Start, Run, Browse, and navigate to the CD's root folder. Click on the file, click Open, and then click OK when back at the Run dialog. This will start up the setup program.

2 When the setup program starts, use all the defaults suggested by the setup program. Just keep clicking Next as the setup program moves through its process.

3 When the setup program is finished, double-click the CMD 2006 icon that was placed on the desktop during setup. When CMD first starts up, it will tell you that it could not find its Configuration files. **This is normal! Click Yes to Create a New CMD File**.

4 When the Create dialog appears, you'll see a field for **File Description**. Erase the stuff in the File Description field and enter a name or phrase by which this data file set will be known. Something like "Community Church 2006 CMD Data" is appropriate.

5 Also on the Create dialog, you'll see the current path. <u>Instead of accepting the suggested path</u> (which will probably be c:\CMD2006), click the **Get Path** button and navigate to the CMDData folder on your server using the standard Windows Browse dialog. Click directly on the folder you created on your server and then click OK to get back to the Create dialog.

6 Once you've established the path to the server's CMDData folder, next change the name of the Data Folder to Data2006. This will distinguish the data folder for 2006 from any prior data folder that might already be in the CMDData folder on the server, and from any future year's CMD data.

7 **If you have the Advantage Data Base server software installed on your server, check the ADS Server box.**

8 Click **OK** to finish. CMD will create Data2006 under your servers CMDData folder, and

move the new data files for 2006 into that folder.

9 Immediately after creation you'll be asked to login. During setup, CMD automatically creates a default User Name of **admin** and a default Password of **password**. Enter these values in the proper login fields and click OK.

10 If your church has purchased the Contributions Manager either now or sometime before, your copy of the CMD Master CD will come with a sticker on it giving you the code to enable contributions. Click File, Configuration, Enable Contributions. When the **Enable** dialog appears, enter the code on the sticker and click OK.

This completes the installation and setup on the first client computer.

If you have data to convert from a prior CMD version, refer to the conversion/import instructions on page 6 of this manual.

Subsequent Clients:

1 Once you've established the first client's connection to CMD, take the CMD Master CD to each client in turn and follow steps #1 & 2 as listed above (don't forget to map the drive letter first). **But there is an important change in the procedure for each of the additional clients after the first one has been installed**:

2 **Instead of clicking Yes to Create a New CMD File on first startup, click No and skip creation of a new file (one was already created when the first client was installed)**. Go instead to the File Menu, click Configuration, and select <u>Reconstruct Configuration File</u>.

3 Change the stuff in the **File Description** edit box and enter your church's name there (you might wish to use the same entry on each client so that it will appear the same everywhere).

4 Click the **Get Path** button to navigate to the server's CMDData folder. This time, however, go one step deeper and click on the Data2006 folder before you click OK on the Browse dialog. **Be sure to click the ADS Server box if you have the ADS server software installed in your network.** Click OK to finish the Reconstruction.

5 At this point, you'll need to login on the client computer. See #9 above for information about your initial login. And if you need to enable Contributions Manager on this client, see step #10 above.

Repeat this process for each additional client on your network.

23
Contributions Manager Introduction

The **Contributions Manager** allows you to track donations made to your church, print statements to the individuals or families who made the donations, print general reports, list the names who give to certain accounts, and define and track pledges.

The Contributions Manager also prints **deposit registers** that you can use to verify your deposit to make sure that you have properly accounted for each donation that you are including in the deposit. These deposit registers also make an important hard-copy backup of your work in case your computer's hard drive crashes or some other computer-related emergency happens.

The Contributions Manager is an integral part of CMD, using the names and addresses already entered into the CMD's data file.

Before You Begin Using Contributions

Before you attempt to use the Contributions Manager in a serious way, we recommend that you take the time to do two things:

- **Spend some time practicing using it**. Enter lots of data, print some reports and statements. Get used to the way it works so that you'll be thoroughly familiar with it before attempting to use it in earnest. Once you are finished practicing, you can erase the old data and start again.
- **Carefully think through which accounts you wish to use**. You can define up to 300 different accounts to which donations can be marked. Place the ones you will most use at the top of your list, or else alphabetize them so that the computer can help you quickly search for them when you are entering them.

Defining Accounts

To define your donations accounts, click the **Define Accounts** item on the Contributions Menu. You may enter up to 300 accounts. These accounts are the accounts to which people will donate their money during the year.

Who Do You Record Contributions For?

The Contributions Manager is designed to take entries for a whole family in the name of just one person. Unless specific individuals in the family wish or need to receive separate acknowledgement for their specific donations, we recommend that you enter donations in the name of an adult in the household. In the case of a married couple, use either the husband or wife's name, but not both (unless each one wants separate statements).

Protecting Confidentiality

We strongly recommend that you use CMD's security features (discussed in Chapter 2 starting on page 11) to protect the confidentiality of your giving records, making sure only authorized users have access to contributions information.

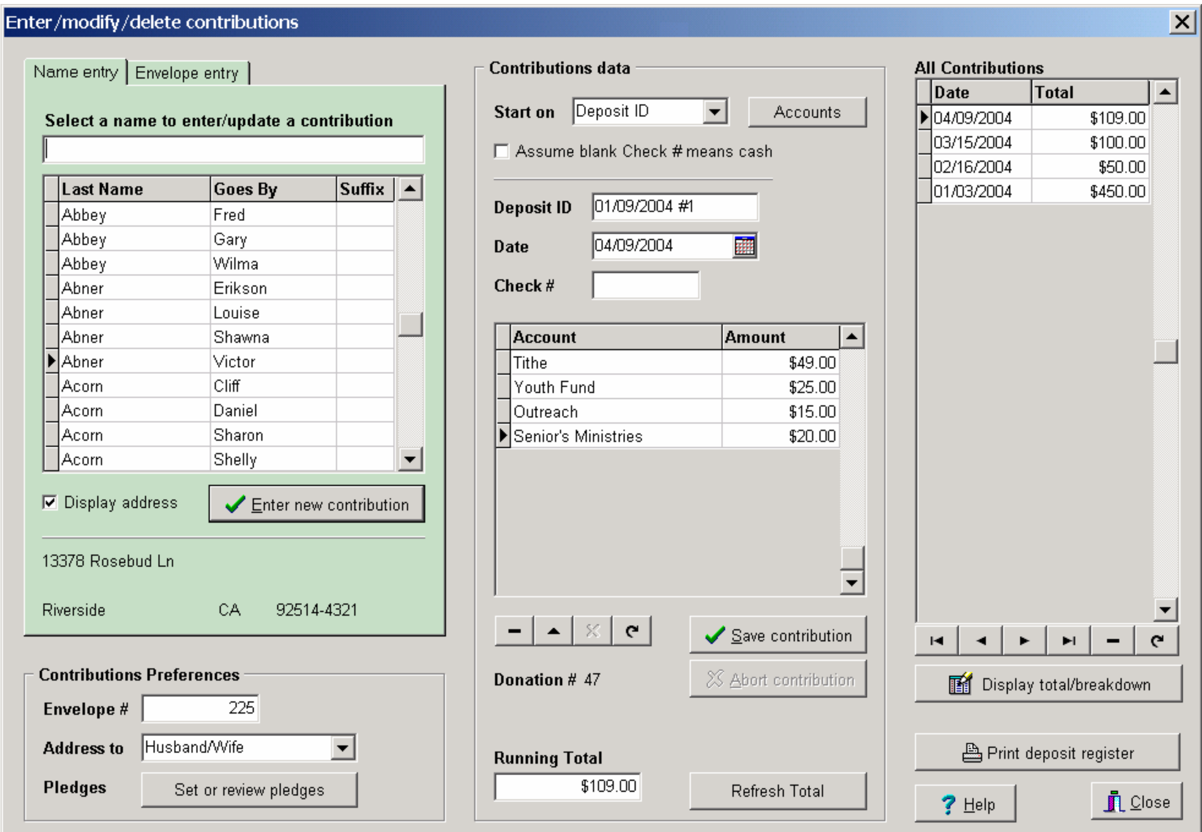
Last Words of Advice

We've designed the Contributions Manager to faithfully serve you in recording donations made to your church. However, you'll need to approach it on its own terms, learn how it works, and use it the way it was designed or you'll possibly get unexpected results.

Also, please be manic about backups once you start using Contributions. **Also be manic about printing and storing the deposit registers that the system prints.** These hard-copy backups can become invaluable if you have a computer or program problem in the future.

24
Enter/Modify/Delete Contributions

Much of the work flow for Contributions happens on the **Enter/Modify/Delete Contributions dialog** option on the **Contributions Menu**. As you look over the following screen grab, note that there are 3 basic "columns" on the dialog, each providing different functions:



Here's what's in the **first column**:

- A tab page containing a names list from which you can select people from your data file for whom you wish to record a donation. Note in the screen grab that this box is in a different color. This tells you visually where you are working at the current moment on the dialog. This highlight changes as you work with different parts of this dialog

- A tab page containing a box you can use to enter an envelope number as the means to select the people from your data file for whom you wish to record a donation
- A place to enter an envelope number of a person
- A place to select to whom statements are to be addressed
- A button to set or review pledges for the selected individual

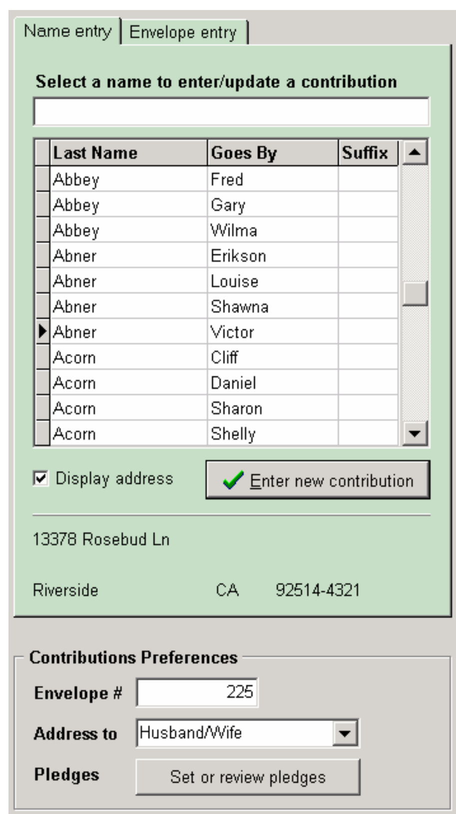
The **second column**:

- All the controls needed to enter a contribution
- A means to remove a split from a contribution
- Buttons to save, abort, or retotal a contribution

The **third column**:

- A grid which displays all the contributions made for the currently highlighted name
- A navigation bar to move around in the list of contributions, as well as the means to erase an entire contribution
- A button giving you access to Deposit Register features

Name Selection Column



The **Name Selection column**, which is the first column on the dialog, provides the means to select the names for whom donations are to be recorded, and to initiate the entering of a new donation. You can use either the **Name Entry** or **Envelope Entry** pages as needed. You can switch back and forth between them during an entry session if some of your donations come marked in numbered envelopes and others do not.

In all cases, you can only add donations to names who are already entered into your CMD data file. If you encounter a donation from a person who is not in your data file, leave the Contributions dialog and go to CMD's Enter/Modify/Delete Names dialog, enter the name, and then return here to enter their donation.

When you first arrive at this dialog, the Name Entry tab is selected, and the first name in your data file is highlighted. If you have already saved donations for the highlighted name, the far right column will display those donations with the most recent contribution received highlighted at the top of the list. The details of the highlighted contribution will be displayed in the center column.

Name Entry Specifics

To enter a donation by name, use the Name Search tools provided on the **Name Entry** tab page. You can type in the first few letters of their last name or use the scroll bar to scan the list. When you see the specific person you want, click on him or her.

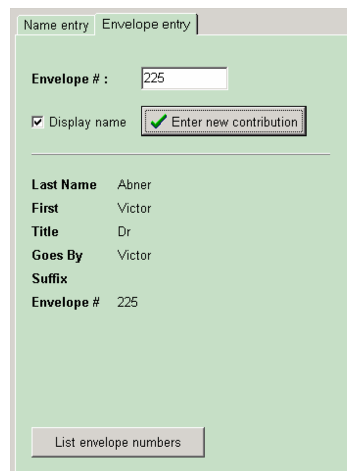
Below the area where the names list is shown, the address of the currently highlighted name is displayed. If working with the names list feels sluggish on your system, you can uncheck the **Display Address** check box and the address will not be displayed. If you need to check it for a person, click the check box again as needed.

In the example shown on the screen grab on page 189, the name Victor Abner was selected by clicking on him. The third column shows that there have been 4 contributions recorded for him, and the center column displays the details about the currently highlighted contribution dated 4/9/2004.

To initiate the recording of a new donation, click the click the **Enter New Contribution** button. This clears out the center column (Contributions Data) and places the cursor in the appropriate field to allow you to begin entering the information.

Envelope Entry Specifics

Many churches use numbered envelopes which are assigned to a person or family at the beginning of the year and remain with them for at least the current year. If you need to call up names by envelope number, click the **Envelope Entry** tab. Enter the envelope number in the box provided and then click the **Enter New Contribution** button.



Important!

Once you've clicked the **Enter New Contribution** button, the functions on the Name Entry or Envelope Entry tab pages "freeze" until you finish the contribution either by clicking the **Save Contribution** or **Abort Contribution** buttons in the center column.

Contributions Preferences

The **Contributions Preferences**, located at the bottom of the Name Selection column, allow you to specify the envelope number, to whom the statements should be addressed, and access to the pledge definition dialog (pledges are handled in Chapter 26).

When first entering envelope numbers in the Contributions Preferences section, enter the envelope number for *only one person in the family*. That is, if an envelope number is supposed to be for an entire family, <u>only enter the envelope number in the data record of only *one* of the adult members of the family</u>. Do not enter the envelope number in each family member's record. This will cause problems when recording and reporting information.

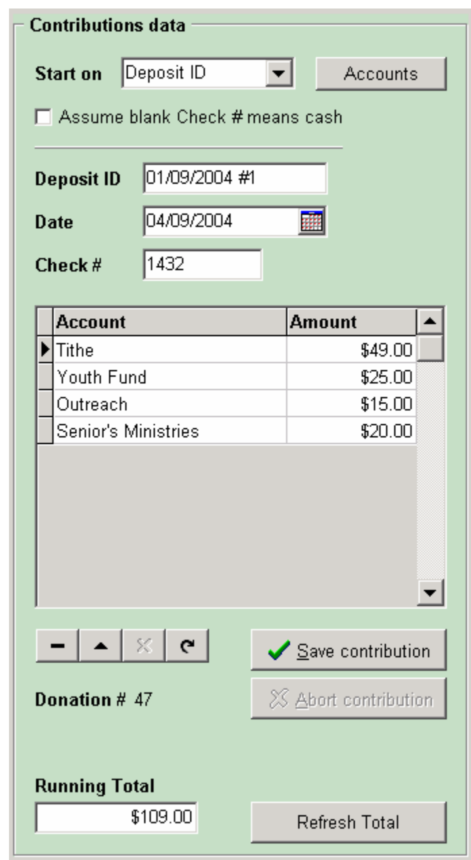
When entering an envelope number for a name, it will be automatically saved when you tab out of the **Envelope Number** field.

Use the **Address To** field to designate to whom statements should be addressed. If you select Individual, they will be addressed only in the name of the person in whose names the donations were recorded. If you select Family, the family name will be listed. If you select Husband/Wife, then those names will both be included on the statement. This setting is meant to be unique for each home, so make these settings for each family as needed.

Generally, you'll use the Contributions Preferences section early in the year, and may not need to even refer to them later on. Most of your work in this column will be to select the names for whom donations are to be recorded.

Contribution Data Column

The center column displays **Contributions Data**, and provides the tools needed to enter or update one or a series of donations.



When the Enter New Contribution button has been clicked on either the Name Entry or Envelope Entry tab pages of the Name Selection Column, the cursor will be placed in the center column so that you can enter the details of a donation.

Start On Selection

The very first time you click Enter New Contribution in a given session, the cursor will first be placed in the **Deposit ID** field. This allows you to define the Deposit ID and Date for the deposit that will correspond with the donations you are about to enter. Once you have specified the Deposit ID and Date fields, you may wish to use the **Start On** field to tell Contrib where to place the cursor for the rest of the entries in this session. This will keep you from having to tab through the Deposit ID, Date, or Check Number fields if what is to follow belongs to the same deposit and date.

Assume Blank Check # Means Cash

Check this box if the entries are to be assumed cash entries if the **Check #** field is left blank. When checked, the word CASH will be automatically be entered there for you. This may be useful if you wish to see separate totals within your deposit register for cash and check donations.

Deposit ID

The **Deposit ID** is simply a way to differentiate between sessions or deposits when donations are entered. Typically, you will have a unique Deposit ID for each week's donations. In a larger church, you may need to split your donations into several smaller deposits. Be sure to give each one a unique name. By default, Contrib places today's date along with "#1" in the Deposit ID field. Use any naming convention that you like, but be consistent.

If your deposits contain many donations, you may wish to do all the check donations in one batch with its own Deposit ID, and then record all the cash donations in one batch with is own Deposit ID.

Whatever pattern you decide to use, use it consistently.

Date

You can either enter a date manually, or you can select it from the pop-up calendar by clicking on the calendar icon at the right edge of the date edit box.

You can use either the date the donations were made (generally a worship date) or you can use the date of entry. Either is fine. Once again, develop a consistent pattern and stick with it all year.

Check Number

If you wish to record the check number, enter it here. If it is a cash donation, enter CASH. But there are other ways to use this field as well.

In addition to CASH and a check number, Contrib is programmed to watch for CC (credit card) or RECEIPT (meaning that a church member made a purchase for something for the church and has turned in the receipt. They don't wish to be reimbursed, but they wish to have the value of the purchase credited to them as a donation).

Be careful in your use of these items. If you have CC or RECEIPT type donations to record, do not record them with the same Deposit ID as cash and check donations! Put them in their own Deposit ID session. This will allow you to record totals for receipting purposes, but won't affect balances sent to your checking account as a deposit.

Press TAB in the Check Number field to move into the **Account/Amount Grid**.

Account/Amount Grid

Once you've pressed TAB at the Check Number field, a new line in the Account/Amount grid should be created, and the list of accounts should be opened.

If a new, blank line in the grid was *not* created for you, click the triangle button in the small navigation bar just below the grid. If the list of accounts was not automatically opened for you, click the small arrow icon on the right edge of the **Account** field.

Highlight the choice on the menu you want, press Enter to select it, *then* press either Enter *or* Tab to move to the **Amount** field. You can also type in the letters of the account you wish to use and the highlight bar will move to the item that matches what you are entering.

When entering the amount, enter it as you would any currency value. You'll need to enter the decimal point if you are going to enter cents.

If you do not have any more than one account and amount to enter for a given donation, then click the **Save Contribution** button, or type **Alt-S** to save the donation and finish this entry. Once you click Save Contribution, the Names List or Envelope Number entry box will be enabled again so that you can call up the next name for whom to enter a contribution.

Splitting a Contribution

Often a donor will give you one check but want the gift apportioned among several accounts. If you need to add more to an entry because the donation is to be split among several accounts, then press Enter or Tab after you've entered the first account & amount and a new line will be created for you. Keep entering the accounts and amounts in the same fashion until you are finished. There is no limit to the number of ways that you can split a donation.

If you find that you have pressed Enter or Tab accidentally after you've entered all the accounts and amounts you need and opened one more line than you need, just click the Save Contribution button anyway and the extra line will be removed for you.

If for some reason the grid erases the area to enter data when you click in it, click the triangle icon on the short navigation bar immediately below the Account/Amount grid. A new line will be opened up for you to enter data.

Erasing a Line from a Split

If you need to remove a line entirely from a split that's already got data in it, click on either field on the line you need to remove, and then click the – button on the small navigation bar immediately below the Account/Amount grid.

Donation

Just under the grid's navigation bar, the Donation # is listed for the donation that is currently selected. This is a unique number that the computer assigns as new entries are made. If you wish, you can write this donation number down on an envelope if you need it for future reference to reconcile your totals.

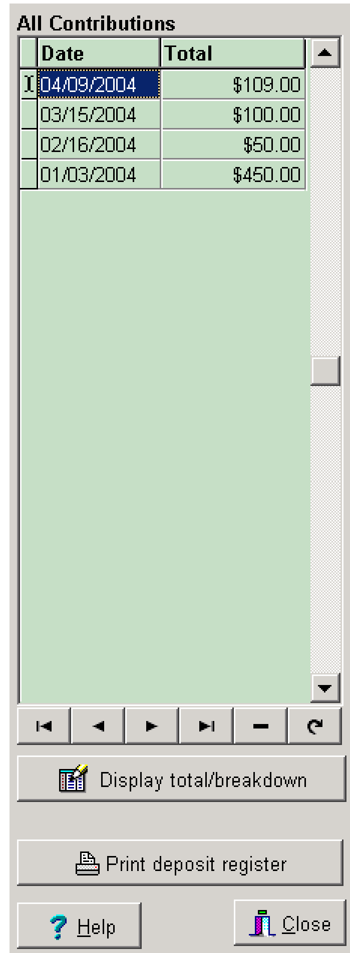
Aborting an Entire Contribution Entry

If you need to abort an entire contribution entry while you are still entering it, click the Abort Contribution entry button.

Refresh Total

If the total does not appear to be correct based on the amounts you've entered, you can click this button at any time to re-total a contribution.

All Contributions Column



This column displays the list of all contributions made by an individual when their name is highlighted on the names list on the Name Entry tab page. By default, the list is sorted in most recent donations first. Click the Date column if you wish to sort in date ascending order.

Also in this column is the button you click to gain access to the Print Deposit Register function (explained below).

Navigating

You can use the scroll bar to move up or down in the list of donations if you wish. Or, you can use the buttons provided in the navigation bar just under the list of All Contributions. You can move up or down one donation at a time, or you can move to the first or last donation by clicking the appropriate buttons as well.

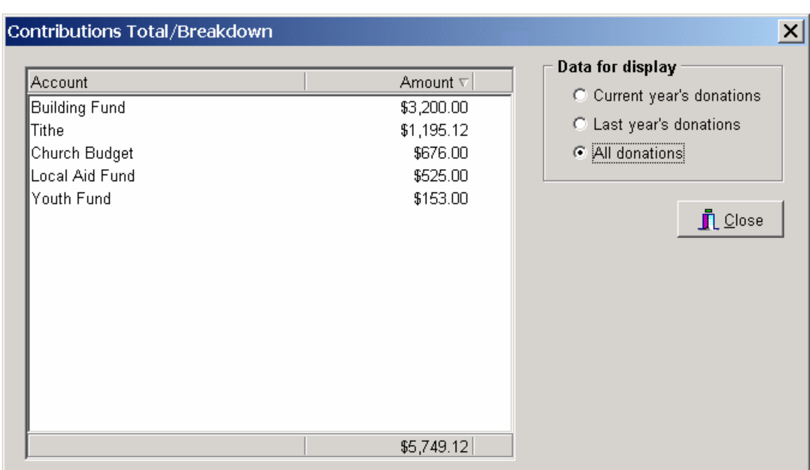
Deleting a Donation

To delete a donation, first find and highlight the name on the Name Entry tab page. Once the name is highlighted, a list of all their donations will appear in the third column. Click on the one you wish to delete. Click the – button just under the list of All Contributions. A second prompt will ask if you are sure.

Display Total/Breakdown

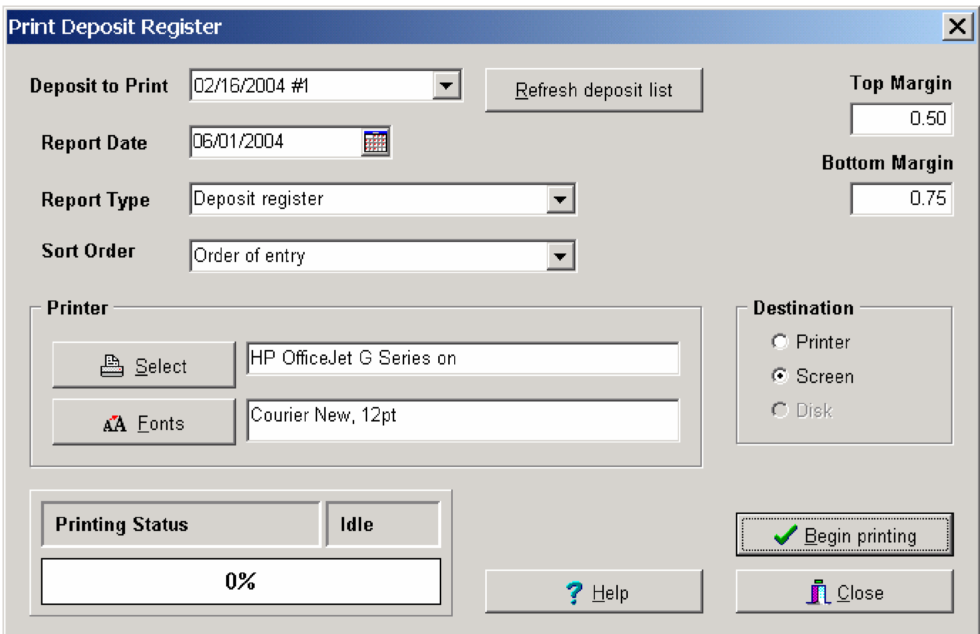
Click the **Display Total/Breakdown** button to see a screen that shows totals by account of all of the currently highlighted name's giving.

You may display the current year's donations, last year's donations, and all of the person's donations by clicking the appropriate radio button on the Display Total/Breakdown dialog.



Print Deposit Register

This dialog, available both here and by its own menu choice on the Contributions Menu, allows you to print a summary of all donations that are to be deposited in a single deposit. When selected, it looks like this:



Deposit To Print

First you'll need to select which deposit to print. The list of items in the **Deposit to Print** combo box is the list of all the sessions entered in the system. They are shown in descending order, with the most recent deposit first (if the date is used in the Deposit ID).

The Report Date is the date that is printed on the report itself.

Report Type

There are 5 options:

- **Deposit Register**. This is the bare bones report showing the names, accounts, and amounts given.
- **Deposit Register with Envelope Num**bers. As above, except that envelope numbers also appear.
- **Deposit Register with Check # Info**. This report shows the names, accounts, and amounts, but also provides subtotals of cash, check, CC, and receipt donations.
- **Account Register**. This report only reports on the accounts and amounts. No names are provided.

- **Name, Date, & Amount**. This form is best used when you are needing to locate an entry in a deposit list to debug it.

  For example, if duplicate Deposit ID's appear on the Deposit ID list, it generally means that one or more entries in a deposit have a different date than the rest of the items. Use the Name, Date, and Amount Report Type to print a list that will detail all the items in a deposit showing the date and the total of the donation. Modify each entry in the deposit to have the same date. That will eliminate the duplicate Deposit ID items.

Sort Order

There are two sort orders available, Order of Entry and Alphabetical Order. Generally, Order of Entry is preferred since it will show items in the same order they went on your deposit slip.

Reconciliation

After you finish entering all the donations that are to be in a deposit, be sure to check the deposit register carefully with your deposit slip to make sure they agree. If they do not, reconcile the errors and then print a new, accurate deposit register if necessary. **Only save the final, accurate deposit register in your notebook.**

Important!

As we've said in other parts of this manual, we strongly urge you to be faithful about printing and keeping printed deposit registers. This may be an important backup medium someday! We suggest that you punch them with a three-hold punch and put them in notebooks divided up by year. That way you'll always have a ready reference if needed.

Tips for Using the Enter/Modify/Delete Contributions Dialog

In general use, you'll use the first two columns to enter a batch of contributions that will go into a single deposit.

The process will become routine once you have done it a few times, but here are a few tips to keep in mind as you are doing it:

- Identify the donations that will go into a single deposit with the Deposit ID field. After you've entered all the donations in a single deposit, if you have more to enter, make sure that you change the Deposit ID to another unique name before entering the second batch.
- It doesn't matter what order you enter the donations in. If needed, **you can switch** at will between the Name Entry and Envelope Entry tab pages.

- You can stop for awhile and then return later to finish a deposit entry session. Just make sure you use the same Deposit ID and Date that was being used before you were interrupted.
- Unless you discover a mistake on the spot as you are entering it, **don't mix entry and updating** in the same session. You will work most efficiently if you'll keep a flow of finding and highlighting a name, then clicking the Enter New Contribution button, enter the data for the new contribution, click the Save button, then search for and highlight the next name. Continue in this manner until you've finished your entire session.

  Then stop and print a desposit register and check it for accuracy, reconciling it to your deposit slip.
- **Develop consistent habits** for your contributions work. If you work in a patter for contributions recording, over time you will make fewer mistakes and work more quickly.
- Try to **limit the number of people** who do data entry to as few as possible. It's hard to get a large group working with the same habits!
- **Backup frequently**, and use unique names in case we have to go back to a specific week to find a problem or begin a remedy. Occasionally make a backup copy that is kept off-site for added safety.
- **Keep copies of your deposit registers** in a notebook in case of a computer problem.
- Do not keep working if you sense there is a problem. Call us before you add any more data!

25
Printing Contributions Reports

There are 5 types of reports that may be selected directly from the **Contributions Menu**:

- **Statements**. Either detail or summary information reports that are designed to be sent to your donors. Statements can cover any time period that you specify during the year.
- **General System Reports**. Use these reports to view monies donated to the various accounts that you set up in your system. As with statements, you can print general system reports which report on donations received during any time period during the year .
- **Account Contributor's List**. This reports lists names who have given to specific accounts during the time period you specify.
- **Deposit Register**. You can access the same Deposit Register dialog here that you access from the Enter/Modify/Delete Contributions dialog. More on this dialog can be found on page 196.
- **Envelope Number List**. Use this choice to view or print a list of names with their envelope numbers.

Statements

To print statements, click Contributions and then select **Print Statements**.

Important!

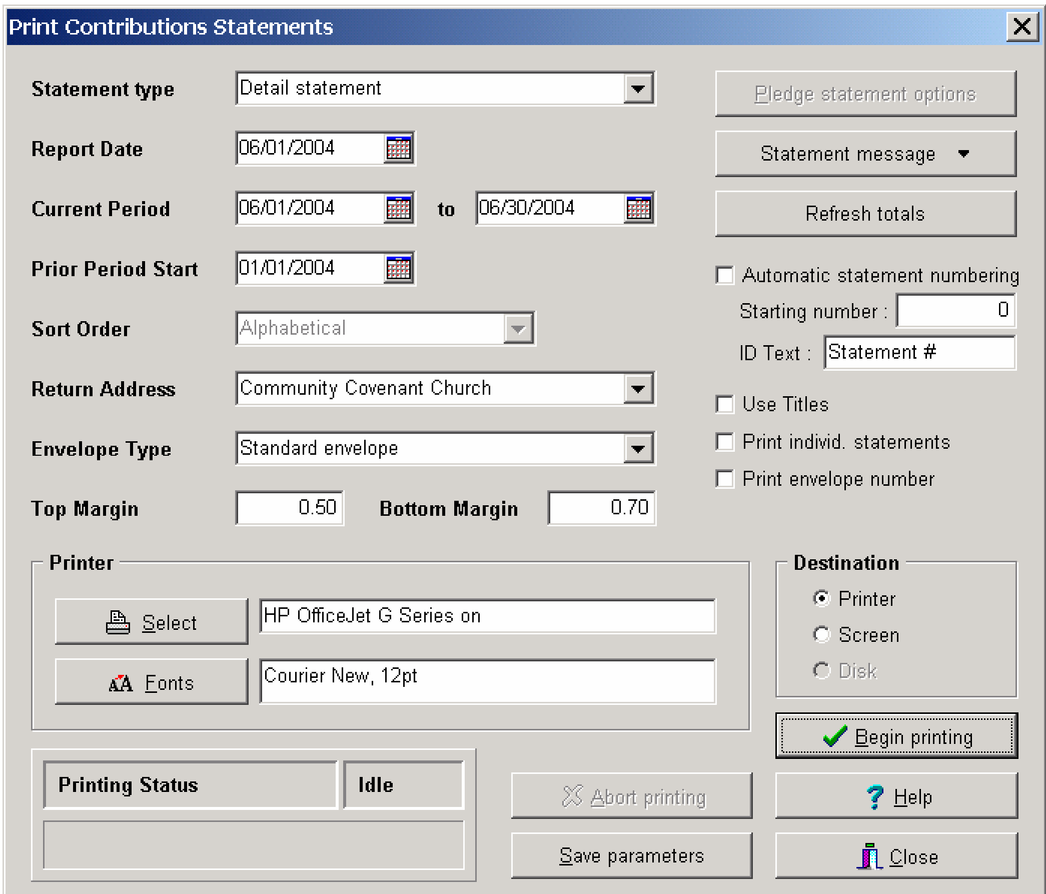
If the **Print Statements** item on your Contributions Menu is grayed out, it's because you have not yet enabled Contributions using the special code that you receive from us when you purchase the Contributions Manager.

Once the code has been entered, the Print Statements item will be made available to you.

Until you enter the code, you can access and test all other Contributions functions except for the printing of statements. This allows you to demo Contributions before purchase if you wish.

Print Statements Dialog

Many of the controls you see you have used already on other CMD dialogs such as selecting Destination, the printer you wish to use, or the fonts you wish to use. We'll detail the options that are unique to this dialog.



Statement Type

There are 4 regular statements, a summary statement for office use, and several options for pledge statements.

- **Detail Statement**. Use this statement for year-end statements. They show all donations, the date, the check number, the amount, and which account or accounts they were assigned to.
- **Summary Statement**. This statement only gives summary totals for donations given to each account. It details donations given during the report period, donations given prior to the report period during the same year, and the total of the prior and current giving.
- **Report Period Only**. This statement provides only the giving recorded during the report period.

- **Year-To-Date Statement**. This statement provides a summary in a single column of all donations given during the entire year up through the report period.
- **All Donations Summary for the Report Period**. This report is generally for office use and is primarily a shortened form of the total giving of all names who gave during the report period. We suggest that you print this report each time you print statements that are given to your donors, and place them in a notebook as hardcopy backup.
- **Pledge Statements**. There are several pledge statements available in CMD 2006. Others will may be added during the year in response to user suggestions. You will want to print a copy of each of the 5 available pledge statements to find the one most useful for you situation.

  The Report Date setting is crucial to getting an accurate pledge report. Always set the report date to be one day or so after the end of the period. For example, if you are wanting to report on pledges at the end of the quarter, set the report period for the starting and ending dates of the quarter, and then set the report date for one day later. Otherwise, the program will not calculate the correct amounts for ahead and behind.

Report Date

This is the date that will appear on the header of the statements as the date the report is issued. By default it is today's date, but you can make it say any date you need to. For example, you might not begin printing year-end statements until January 16 of the following year. You may wish to make change the report date to December 31 when you are actually ready to print the statements.

Current Period

This is a critical setting. By default, the report dates are always set to the beginning and ending of the current month. Change them as needed. Donations given during the report period you specify show up in the "Current" column.

Prior Period Start

Generally, this date is set to the beginning of the current year. You may need to alter this as your needs dictate, but most often you can leave it set at the beginning of the current year.

The most common reason to change this might be to print pledge statements that cover several years. You would set this date to be the beginning date when the pledges were first given so that you can track the pledge giving over the life of the pledge.

Sort Order

This feature is not implemented yet.

Return Address

Select the return address from among the return addresses you've defined in your CMD as the return address that will be printed in the statement header. We recommend that the church name be a part of the return address.

Envelope Type

The position of the statement header and return address are designed to look best when using standard window envelopes. If you select Single Window Envelope, the header line will be centered. If you select Double Window Envelope, the return address part of the statement header will be printed to align with the return address portion of a standard double window envelope.

Top and Bottom Margins

You may need to experiment with how your printer’s margins handle the defaults we’ve provided. Use the defaults if you can. Most critical is the Top margin since our margins place the return and delivery addresses in their proper position for window envelopes.

Pledge Summary Options

This button allows you to determine what kind of statement non-pledgers will receive. It is only activated if one of the 4 pledge summary options is chosen.

In the top portion of the Pledge Summary Options dialog, click the choice to either print the pledge statement only for pledgers, or the option to print a second statement of the type selected for non-pledges along with the pledge statement.

In the lower portion of the dialog, click the statement type, if any, you wish to print for those who gave but who did not pledge to give during the time period you specified.

Statement Message

The button to the right of the Report Date control allows you access to the statement message feature. The statement message is a common message that is printed on each statement CMD prints for you. Here are your options:

- **Don’t Use Message**. Click this option if you don’t wish to have CMD print any message on any statements.
- **Before Financials**. Click this option if you wish to print the message after the name and delivery address is printed but before any financial information is printed.
- **After Financials**. Click this option if you wish to print the message after all financial information is printed.
- **Edit Statements Message**. This choice brings up a dialog on which you can enter or edit the message that will appear on each statement in the position you choose. Once you’ve entered/edited the message, click OK to save it.
- **Edit Pledge Message**. This choice brings up a dialog on which you can enter or edit the message that will appear on each pledge summary in the position you choose. Once you’ve entered/edited the message, click OK to save it.
- **Automatic Statement Numbering**. Check this box if you wish to print statements that print statement numbers. When you check this box, you can enter the starting number, and you may also enter a small text identifier in the ID Text field that will be printed before the number.

Use Titles

Check this box if you wish for titles to appear in the names when statements are addressed.

Print Individual Statements

Check this box if you wish to select from a list some specific names for whom you want to print statements. Only the names you select will be included in the statements that will be printed.

Print Envelope Number

Check this box if you wish to have the names' envelope numbers printed on their statements.

Dealing With Statement Errors

There are a few common statement error conditions that may occur from time to time. Here are some of the ones we hear about and how best to fix them:

- **Erroneous Amounts**. We have heard two or three reports over the years that the totals were off by huge amounts that were obviously not correct. If this happens, we suggest that you leave Print Statements, re-enter it, reset the parameters and dates you need, and then try the reports again. The two or three times we've heard of this happening were all cured by doing this. This is very rare, and chances are you will never see this with your use of Contrib. You can also try clicking the **Refresh Totals** button to see if this clears up the issue.
- **Individual Erroneous Amounts**. In contrast to the above problem where the whole system seemed to be way off, you might find an individual's contributions record to be incorrect. In such cases, you'll need to go back to their name in Enter/Modify/Delete Contributions and spend some time looking through their donations. Generally most of these errors are found and fixed when you print your deposit ID reports, but once in awhile one slips through. You'll just have to hunt it down until you find it.

  However, if the problem appears to be a math problem (items not totaling properly), then you need to contact us for help.

  You can also try clicking the **Refresh Totals** button to see if this clears up the issue.
- **Garbage in the Name Field**. This one almost always has to do with an incorrect setting the Address To preference mentioned on page 192. Most often this happens when the person for whom the contributions have been recorded is a single adult, single parent, or one of the dependents and their Address To field was marked as Husband/Wife. The garbage comes because the program heads off to a routine that finds the husband and wife names that are to be inserted in the name line, only there are is no husband and/or wife to be found.

  To find the problem, look at the address to try to determine the name. If you don't know the address off-hand, you can exit Print Statements and use the Find function on CMD's Find Menu. You can enter the address information in the search box and search your file for the address. This will reveal the name with which you are having problems. Then you can go to Enter/Modify/Delete Contributions, find the name using the Name Search tools there, and change their Address To field to Individual.

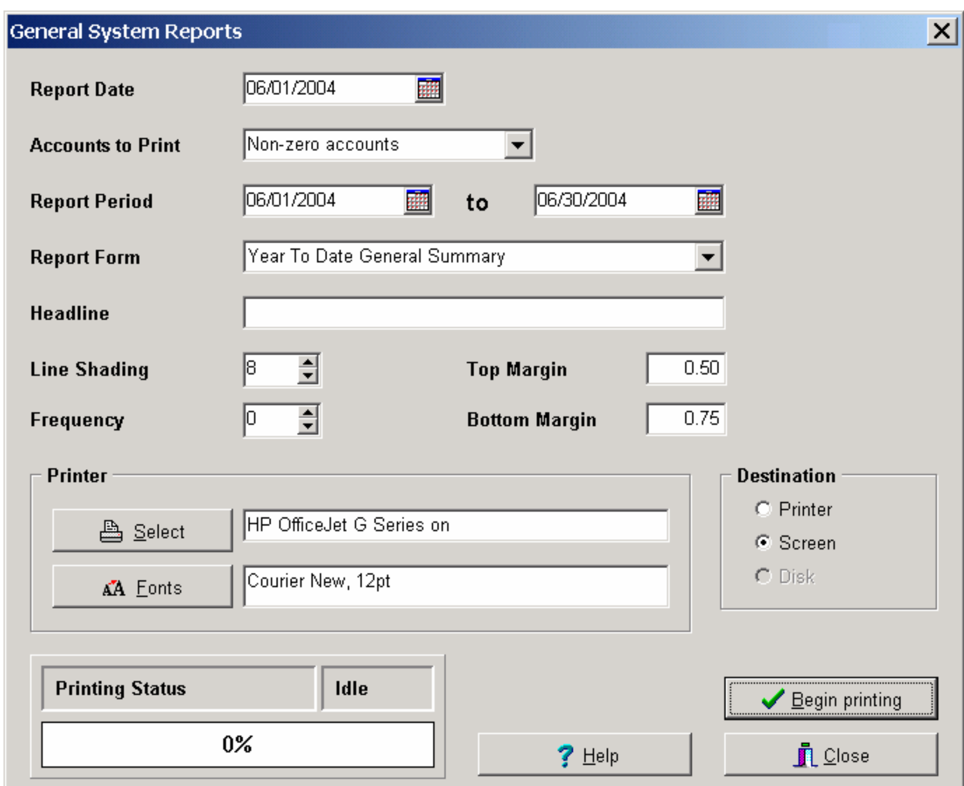
- **Erroneous Pledge Amounts**. This one's a bit harder to get to because of the nature of the way pledges get handled. Generally, the careful setting of the prior, current, and print dates will take care of the pledge issues.

General System Reports

The controls on this dialog allow you to specify a report date, report period, and whether or not the report should include all accounts, or only those that received donations during the report period. You may elect to see a summary, current period only, or year-to-date report. You can also enter a headline if you wish to identify what period the report covers.

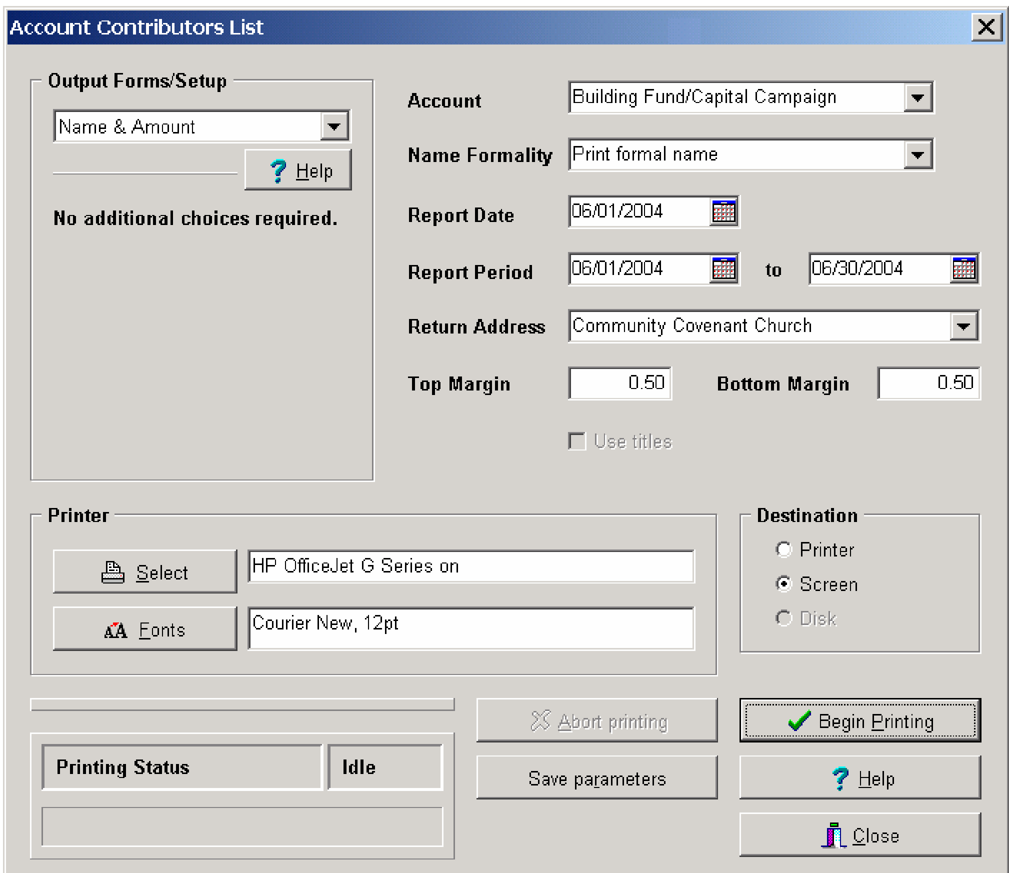
If your list of accounts is long, you may wish to include line shading to help make the report more readable. The Line Shading box controls how dense the shading is. A setting of 4 to 8 is workable for most printers, but you'll need to experiment. The Frequency setting determines how many lines apart the shading comes.

Account Contributors List
Using familiar controls, you can print a list of names in various forms who gave to any specific account during any time period you specify. You'll need to select the Output Form you wish to use, and also the specific account and time period the donations should have been given. Select a return address if you print postcards.



Print Deposit Register

The deposit register is a listing of the all the donations given in one specific session that are related to one specific deposit. The deposit register function and dialog is explained starting on page 196. We will not duplicate that explanation here.

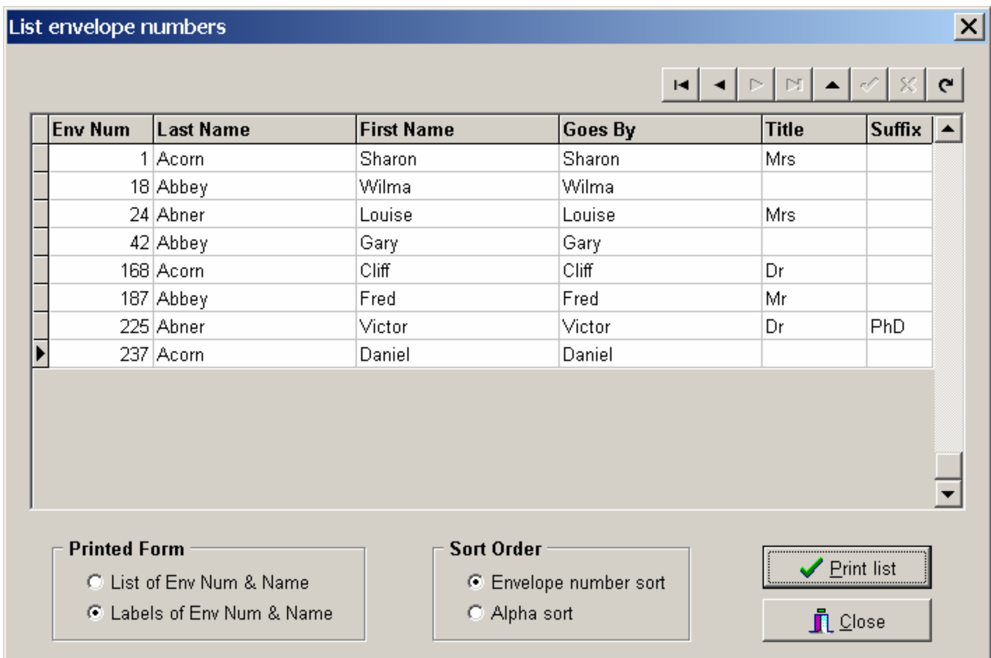


Envelope Numbers

If you need to print a list of names with their envelope numbers or print 3-up labels of names and envelope numbers that can be affixed to an envelope, select the **Print Envelope Numbers List** item on the Contributions Menu.

By default, printed form selected will be List of Env Num & Name, and the list is sorted in envelope number order. Click the radio buttons as needed to switch printed form or sort order. Click Print List to begin printing.

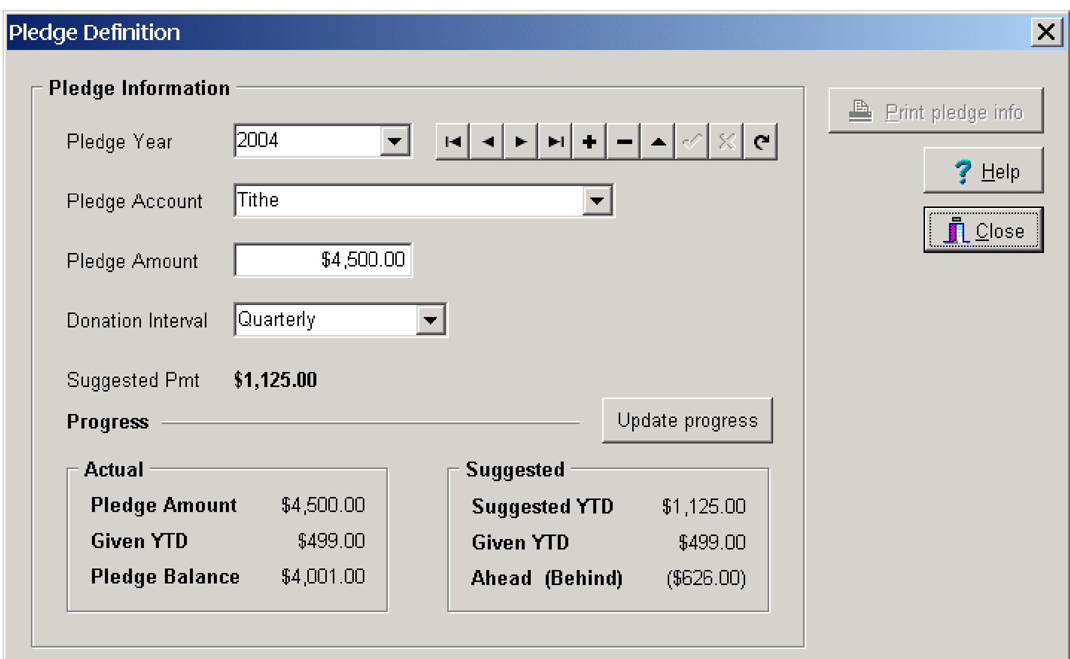
Note that this dialog does *not* list names that do not have envelope numbers.



26
Pledges

The Contributions Manager can track **pledges** made by those who make donations that you record. Pledges are very flexible in CMD, and are set, updated, and reported on a completely individual basis. You don't have to set up special pledge accounts; any of the accounts you have already set up can be used as pledge accounts. You can use *any* account as a pledge account for any number of specific people. Further, *any* name in your data file can pledge to *any* number of your budget accounts.

To record, delete, or update a pledge, you'll use the **Pledge Definition** dialog, which is accessed from the Enter/Modify/Delete Contributions dialog. Using the Name Search tools provided, find and highlight the name for which you wish to enter, review, or modify a pledge. Once the name is highlighted, click the **Set or Review Pledges** button in the lower left corner of the Enter/Modify/Delete Contributions dialog. The Pledge Definition dialog looks like this:



Because you can enter any number of pledges for any individual, you'll need a means to add new pledges for a person as they are needed. The navigation bar in the Pledge Information section provides the means to do that.

You can use the bar to add a new pledge by clicking the + button, delete one by clicking the – button, and scrolling through them by clicking the forward and reverse motion buttons.

Let's walk through the process of defining a pledge.

1. **Click the + button** to create a new pledge record for the name you highlighted on the Enter/Modify/Delete Contributions dialog. This will clear all the pledge fields, and insert the current year in the Pledge Year field.

2. **Pledge Year**. This important field allows you to look back in later years to review pledges made prior to the current year.

3. **Pledge Account**. Select the account to which this person is pledging to give. This is the same list of accounts that you use in other parts of Contributions.

4. **Pledge Amount**. Enter the amount of the pledge for the pledge year. If you need to track multi-year pledges, enter only the portion of the pledge due for the current pledge year.

5. **Donation Interval**. From the drop-down box, select one of the intervals in which the donations are expected. While donors may not always be able to keep the interval they intend, having the target for them will enable you to track their progress more easily during the year.

6. **Suggest Payment**. This field is filled in automatically once the pledge system has enough information to calculate it. It is based on the amount of the pledge divided by the interval you select.

Progress

The lower part of the Pledge Definition dialog reports on the progress of the pledge. It may be that the person for whom you are defining the pledge has already given some toward it. Any monies already given will be considered immediately and the progress as it is at this point you are entering the pledge will be displayed. There are both actual and suggested sections of the progress report.

Notes on Suggested Pledge Balances

Bear in mind that the date you review this information affects the information displayed in the suggested section. At times, the suggested amount may be off a few dollars, depending on the interval and where we are during the year.

For example, if you select weekly as the interval, the program calculates its suggested amount based on the actual number of weeks from January 1, which may or may not fall on the first worship day of the year. To illustrate, if January 1 falls on Wednesday, then anytime you review a weekly interval pledge on Tuesday, the suggested payment for the current week will not yet be included since the program needs to get to Wednesday before it senses that the new week has started.

Just use the suggested payments as a rough guide, noting that where you are in the week, month, quarter, etc, will have an effect on the progress report.

Pledge Statements

Pledge statements show the progress for all of a name's pledged accounts during the year. See page 200 and following for more information.

Multi-Year Pledges

Though not explicitly designed to handle them, CMD's pledge tracking logic can easily handle multi-year pledges.

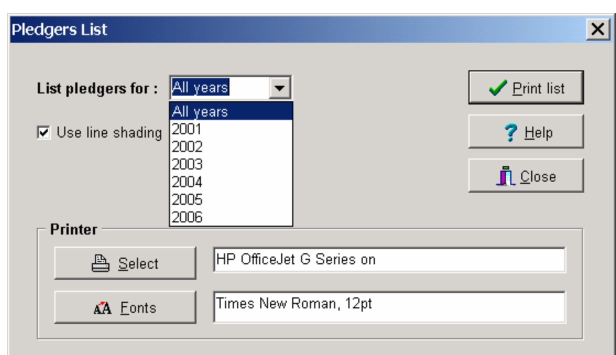
One scenario could work like this. Let's assume that your church is starting a 3 year capital campaign to build a new education wing. You are going to ask your members to pledge their gift over this 3 year period starting in 2005.

If a person pledged, say, $6,000 over the three years, you would enter a pledge of $2,000 in 2006, $2,000 in 2007, and $2,000 in 2008. In this event, go ahead and define a pledge for each year, even though the last two years are yet in the future. This will allow you to see the entire pledge range in advance and looking back as you progress through the three years. You'll need to adjust the interval according to the wishes of the individual making the pledge.

To print pledge statements tailored especially for multi-year pledge programs, click Contributions and then select the Print Multi-Year Pledge Statements option. You'll see a dialog very similar to the one you use when printing standard or pledge statements shown on page 200.

However, this dialog allows you to select a few different pledge statement types, and it allows you to set the year range for the multi-year statements. You'll also need to select the specific account for which the pledge was given.

Pledgers List



The **Pledgers List** item on the Contributions Menu prints a list of names who pledged to any account during any specific year or for all years. Make that choice from a drop-down menu. The printed form shows the name, the year of the pledge, the pledge account, the pledge amount, and the pledge interval. Since it orders the list by name, you can easily see all the pledging done by any one individual at a glance.

When you click **Print List**, a small screen will appear which will let you send the report either to the printer or to the screen.

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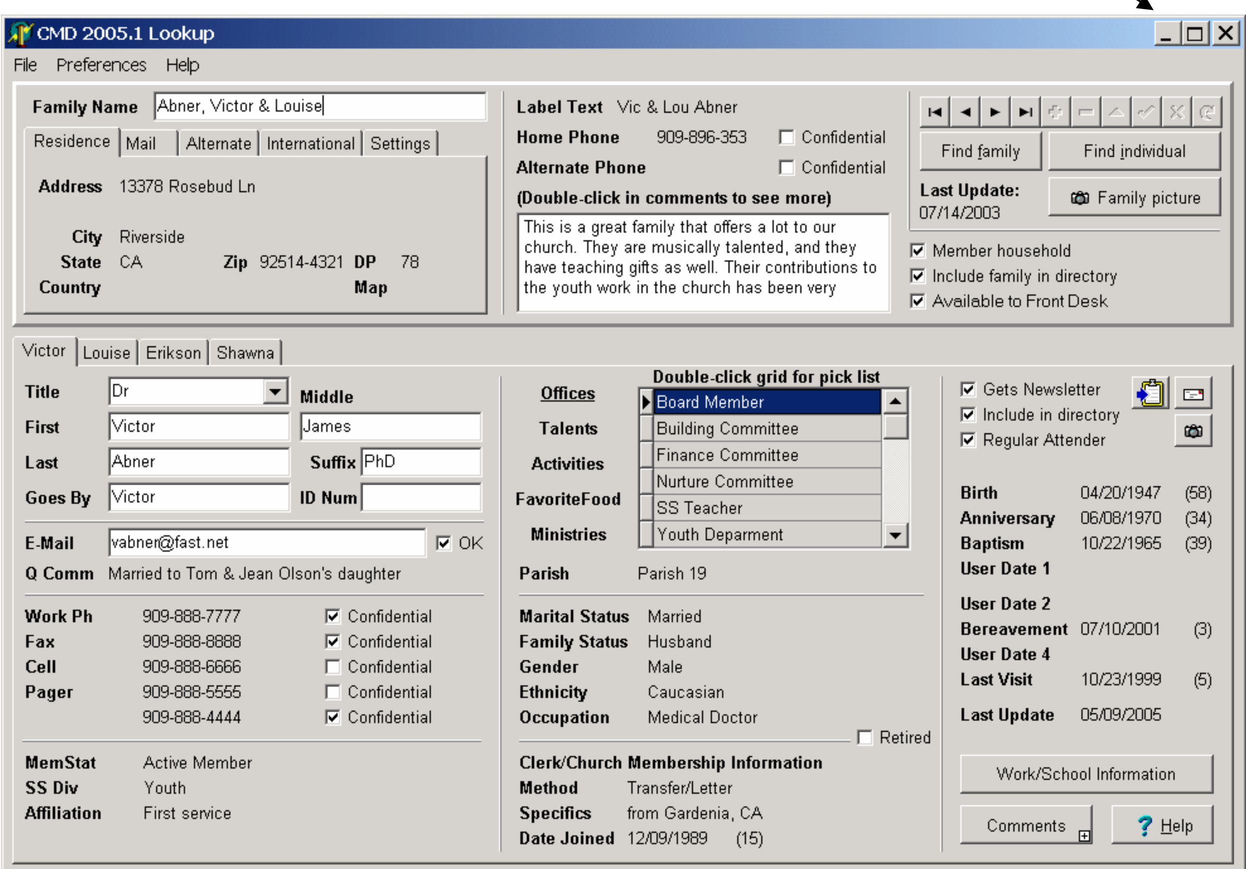
27
Lookup

Lookup is designed to provide a **read-only** view of the data available on CMD's Enter/Modify/Delete Names dialog. Lookup is a completely separate program from the main CMD program, and can be left running in the background for those times when you need a quick means to look up some information about names in your data file.

To start Lookup, either double-click its icon on your desktop, or click Start, Programs, CMD for Windows 2006, and select Lookup from the list of programs that appears. Click the <u>minimize</u> button to place Lookup in the background for when you need it.



Why Use Lookup?

Lookup is a much smaller, less resource-intensive program available to quickly find information about names in your CMD data file. Because it is not a large program, you can leave it running in the background for when you need it. If it's running the background, you can click directly on the Lookup item on your Windows Task Bar to immediately bring it to the screen.

The Lookup Screen

Lookup's screen displays the same basic information shown on the Enter/Modify/Delete Names dialog including all family and personal information, attendance, visitation, comments, and child registry information. Because we wanted to reduce the size of the screen as much as possible, not all fields are displayed in the exact same manner as they are on the Enter/Modify/Delete Names dialog. However, all the information is there and available to you.

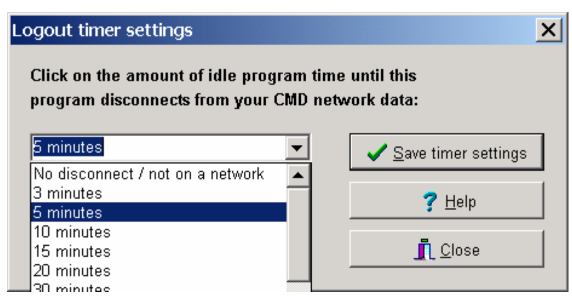
Access Limitations

The same user names and passwords defined for CMD are in force for Lookup. You may gain access to Lookup only if you have access to CMD, and limits on comments and visitation records are the same as they are in the main CMD program.

Lookup's Functionality

While no data may be updated, all the buttons and icons function as they normally do so that you can call up a family, search for an individual, display pictures, print an envelope, send data to the clipboard, and view the child registry information. Double-click the e-mail address to past it to the clipboard.

Logout Timer



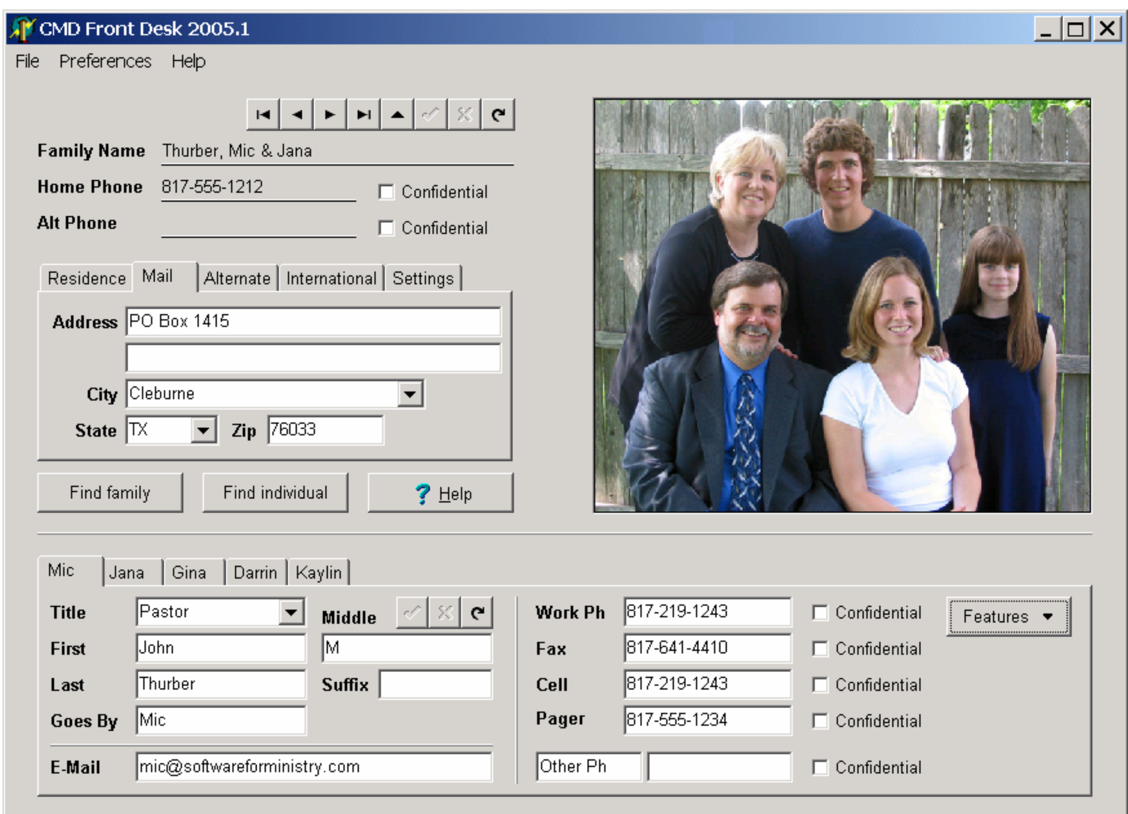
Lookup has a **Logout Timer**, which allows Lookup to automatically disconnect itself from your data files after a given period of inactivity. This is especially important if you run CMD on a network. In general, you should *not* leave a live network connection to important data open indefinitely for a number of reasons. Only one of which is that CMD cannot make a backup of its data if a computer on your network is currently connected to the data file with CMD or Lookup.

The Logout Timer function can be accessed on Lookup's Preferences Menu. When accessed, it presents a dialog that allows you to select from among a number of time ranges before Lookup disconnects itself from the data files. Select an appropriate time from the menu and then click OK. Once the number of minutes have passed with no activity in Lookup, the connection to your data will be automatically released. When you next access Lookup, the normal CMD login screen will allow you to quickly re-establish the connection to your data. If the login screen is not visible and the screen shows no data, click the File Menu and then select Login to gain access to the Login dialog.

28
Front Desk

Think of CMD's Front Desk program as an electronic church directory display program that can be used in a variety of settings at your church. A sample list of uses is presented on the next page. To start Front Desk, either double-click the Front Desk icon on your desktop, or click Start, Programs, CMD for Windows 2006, and select Front Desk from the list of available choices.

When Front Desk appears, it will display the screen shown below. All address, phone, and individual name information is available including a picture if one has been defined for the family.



Front Desk Data Access

After Front Desk has been started, you are required to log in using a valid CMD user name and password in order to gain access to the data. Any valid user who has access to the full CMD system can gain access to Front Desk. In addition, there are two specific user groups designed to provide access to Front Desk *without* providing access to the rest of the CMD system.

- **Front Desk Full Access**. Users assigned to this group can Front Desk and are authorized to make changes in the data.
- **Front Desk Read Only Access**. Users assigned to this group can gain access to Front Desk, but cannot make any changes in the data. Further, confidential phone numbers are inaccessible as well.

New Front Desk users can only be created by an administrative user who has access to the User Administration dialog available in CMD and Front Desk. Note that new Front Desk users can be added while in Front Desk if an administrator is currently logged in.

Sample Uses for Front Desk

Some specific uses for Front Desk include:

- **Front Office Reception Desk**. Perhaps your church has a separate reception area apart from office assistants, secretaries, or administrators. If this reception area is in a public place, it may be more desirable to give the receptionist access to Front Desk rather than the full CMD program for the sake of data confidentiality.

  If used in this way, the receptionist still has access to names, addresses, and phone numbers, but not to the more confidential information that should not be available to public view.
- **Church Lobby**. Having a computer in your church's lobby or foyer would allow church members to stop by and lookup a name, address, or phone number of another member. Or, perhaps a church member would like to update their own name, address, or phone information while they are in the lobby. Having Front Desk running on a computer in your lobby would allow for members to have immediate access to the latest information you have while keeping the rest of CMD's information out of reach.

  If your church does not have a network but would still like to use Front Desk for this purpose, make a practice of backing up your CMD data in the church office and then restore it to the computer in the lobby. After the worship day is over when updates were made, backup in Front Desk and then restore back in the church office at the beginning of the first work day of the week. If you are able to access a network connection in the lobby, updates made there are reflected immediately in the whole CMD system.
- **Classroom Access**. Perhaps you want to provide access to church directory information in each of your children's division classrooms so that teachers can view or update information about those who attend their class or division.

Use Front Desk in most any setting where you need the basic information generally found in a church directory to be made available while protecting the rest of CMD's data from view or access.

Setting Up Front Desk

Front Desk is placed on your computer whenever you set up CMD to run on any computer, whether as a stand-alone computer or one connected to a network.

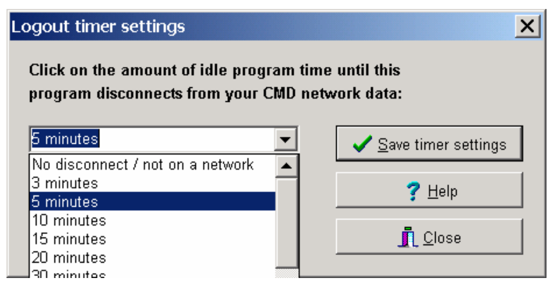
If you plan to use Front Desk on a stand-alone computer not connected to a network, you'll need to follow the instructions in Chapter 1 of this manual to set up CMD itself, including the step of creating a new CMD file when you start up CMD for the first time.

Once CMD has been established on your computer, you can then backup data from a computer that has the CMD data on it that you wish to use, and then restore it on the remote computer on which Front Desk will be used. Once the data has been restored using CMD, then you can exit CMD and start up Front Desk.

If you do use a stand-alone computer, you'll need to use the same cautions regarding data backups and restores that are discussed on page 9 under the section "Using CMD on More than One Computer."

If you are able to connect the computer to run Front Desk to your network, refer to the instructions for setting up CMD on a client in a network in Chapter 22, "Using CMD on a Network."

Logout Timer



Front Desk is equipped with a **logout timer** similar to the one in Lookup. This timer allows Front Desk to automatically disconnect itself from your data files after a given period of inactivity. This is especially important if you run CMD on a network. In general, you should *not* leave a live network connection to important data open indefinitely for a number of reasons. Only one of which is that CMD cannot make a backup of its data if a computer on your network is currently connected to the data file with CMD or Front Desk.

The Logout Timer function can be accessed on Front Desk's Preferences Menu. When accessed, it presents a dialog that allows you to select from among a number of time ranges before Front Desk disconnects itself from the data file. Select an appropriate time from the menu and then click OK. Once the number of minutes have passed with no activity in Front Desk, the connection to your data will be automatically released. When you next access Front Desk, the normal CMD login screen will allow you to quickly re-establish the connection to your data. If the login screen is not visible and the screen shows no data, click the File | Login to the Login dialog.

Editing Data in Front Desk

Any valid CMD user except for users in the Front Desk Read Only Access users group can update any data item visible on the screen. Changes made here are reflected in the actual data if Front Desk is used on a network with a live connection to your CMD data. If Front Desk is not currently connected to data on a network, then the changes will only be recorded on the local computer.

If you need for the changes to be taken back to another computer or network in your church office, then you can backup the data file on the computer running Front Desk using CMD's backup function and then restore the data back in the church office.

Determining Which Names Appear in Front Desk

There is a check box setting in the Family Data area in CMD's Enter/Modify/Delete Names dialog that allows you to determine if a given family should be included in the data available to Front Desk. If this box is unchecked, that family's name and other data will not appear in Front Desk.

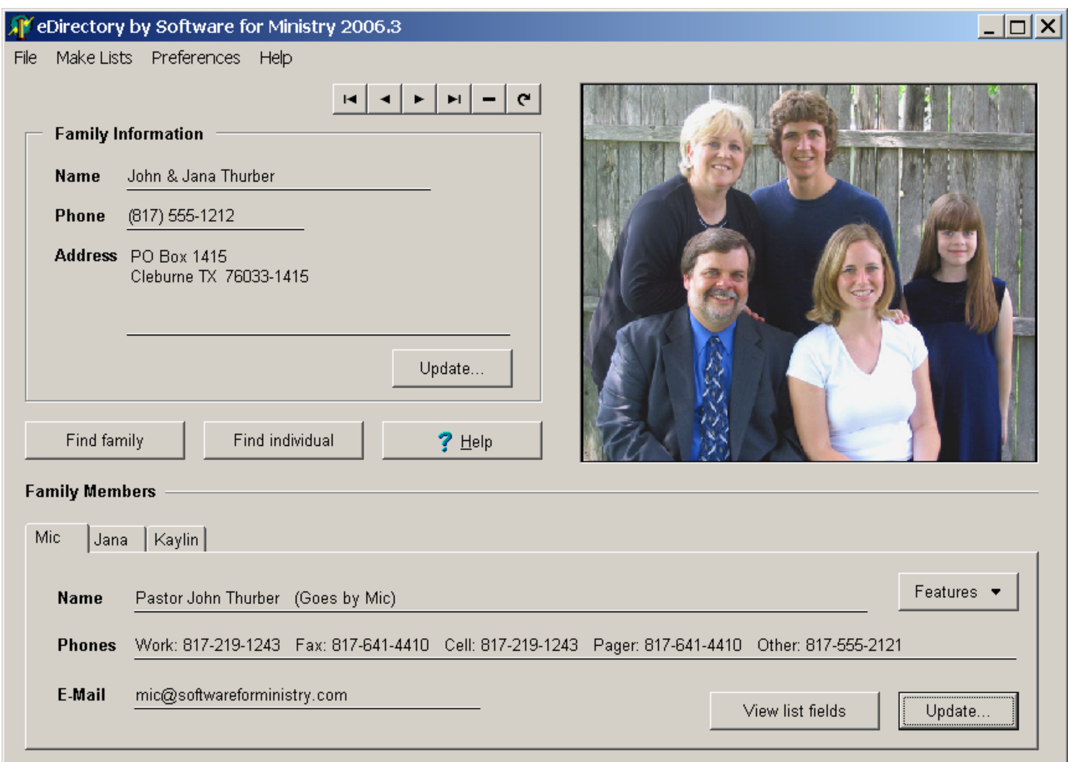
In most cases, you should make families available to Front Desk, but there may well be some in your church who are sensitive about their information being used even in the ways you might be using Front Desk.

29
eDirectory

eDirectory is a stand-alone program in your CMD system that you can freely distribute to your church's members. It is designed as an electronic replacement for the traditional printed church directory that displays name, address, phone, and pictures. In addition, you can include a number of the CMD's menu fields so that your church members can access church officers, members with specific talents, those who enjoy certain activities, and more, right on their home computer.

eDirectory **data files are completely separate** from your church's CMD data files, so confidential information remains confidential. The eDirectory program included with CMD 2006 comes already packaged in a setup program that you can make available to your members either as a download from your web site, or it can be distributed on a CD. You can also order a special setup version of your data from us if you wish. We'll explain the benefits of both in this chapter.

Below is a screen grab of the eDirectory program while running.



Using eDirectory

The instructions for using eDirectory are divided into four topics:

- Preparing your data to create the eDirectory data files
- Creating the eDirectory data files
- Distributing the program and data
- How your members will use eDirectory.

Preparing Your Data

The process of preparing your data for eDirectory is virtually the same as if you were preparing it for a printed church directory. You should print a complete copy of your directory then check it carefully for accuracy, making any needed changes prior to creating the eDirectory data files.

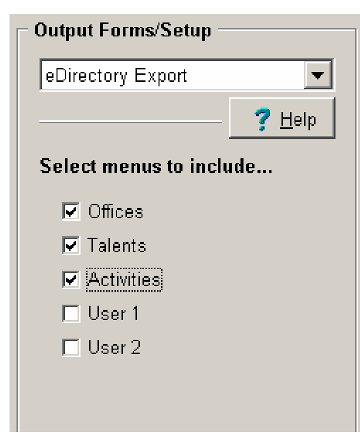
We suggest that you print a complete directory using Format B since it gives you access to more phone numbers. Use the **Phone Setup** button on the Print Control page of Print Names to tell CMD to print all the phone numbers it can. The Phone Setup button is visible when Church Directory has been selected as the Output Form. In addition to checking phone numbers, make sure addresses are up-to-date, and check carefully for any entries that have the asterisks surrounding the name something like this:

*** Smith, John & Mary ***

Names marked in this manner are an indicator of some problem with one or more family members' data field settings which casued CMD to question how the name(s) should be formatted. Page 70 has more information about how to identify and fix such names.

Creating eDirectory Data

All data used by eDirectory comes from your CMD program using the data that you have already prepared and proofed. Only common church directory information will be exported, along with any of the menu fields that you elect to include in eDirectory's data files. To create the data for eDirectory, follow these steps:



1 Select the appropriate names to be included using the Selection page of Print Names just as you would for a church directory to be printed in CMD.

2 On the Print Control page, select eDirectory Export as the Output Form.

3 Select any menus that you'd like to include in the eDirectory data files by checking the box beside the menus you wish to include (see screen grab at right).

4. Click Begin Printing to create the eDirectory disk files. When printing begins, CMD will "print" the needed information to a file named eDirData.Zip that will be placed in your CMD 2006's data folder.

Remember that CMD *only* exports the data that is normally printed in a traditional church directory. All confidential information remains safely in your CMD data file.

Distributing eDirectory and Its Data

Once the eDirectory's eDirData.Zip data file has been created using the steps outlined above, you can distribute it to your church members. **You can distribute the eDirectory program to members of your church without any additional cost or fees**. However, you can *only* distribute eDirectory to members of *your* church.

There are two ways to prepare to distribute eDirectory and its data. One is free to you, and one we will do for you at a cost of $25 per creation.

Distributing eDirectory and Data for Free

Use your CD creation software to create a CD project placing both the eDirSetup.Exe program that is in the eDirectory folder of your CMD 2006 Master CD ***and*** the eDirData.Zip file that was created in the steps outlined above. Create as many copies of the CD as you need to distribute to your members.

If you purchased CMD from our web site, you can download a copy of eDirSetup.Exe from the demo page of our web site or on the URL where the full program was located.

Low-Cost Preparation Option

If you prefer, you can e-mail us a copy of your eDirData.Zip file and we will prepare a setup program that puts your data and the eDirectory program files all in one setup file. Our fee for doing this is $25 per file creation. Once we send it back to you, you can then place the one file containing both program and data in a new CD project and create as many CD's as you need.

Why Might You Opt for the Single File Approach?

We offer this single file approach because it provides a cleaner, easier install on your members' computers. In the free option you have, when the program is run for the first time, it will search Drive D for a valid eDirData.Zip file. If it finds it, eDirectory will attempt to open and restore the data files directly from the CD.

However, in some instances, CD drives and Windows don't always behave perfectly together and the automatic search for the data may not be successful. There is a way to manually search for the data files. If that is not successful, then users will need to manually copy the ZIP file from the CD to a location on their computer and then have eDirectory search there for it. While these types of problems will be rare, they can happen.

The single file approach allows us to put your data into a single setup program file along with the eDirectory program that is installed at the same time that eDirectory is installed. The data will be visible to eDirectory from its first startup.

The $25 fee is for creating the setup program for you with your data built-in. You may create as many CD's as you desire from the one program file we create.

Our best advice is to try the free option first, but duplicate only a limited number of copies and ask several of your members to try it out on their computers to make sure it works properly. Only after confirming that most are having no trouble should you make many copies of the CD.

Using eDirectory

Using the eDirectory program itself is very simple. To start the program, users double-click the icon placed on their desktop during setup. The data is automatically loaded and displayed when the program is started. There is on-line help to answer operational questions.

Your members can navigate around the data file by clicking the Find Family or Find Individual buttons, they update their information by clicking the Update buttons, and they can print an envelope to the family on the screen or send the family name and address information or e-mail address to the clipboard by using the Features button. Users can remove a family from the data file, but cannot add families to it.

Updating eDirectory Files Later On

You can update your church members' eDirectory files at any time by creating a new eDirData.Zip file and then distributing it either from your web site or on CD's. When a user receives an updated file, they use the Import Data option on eDirectory's File Menu.

Note that when the eDirectory files are updated, any changes users made to their data files on their own computers are overwritten by the data that you provide as an update.

Support for eDirectory

Software for Ministry cannot provide support to your members in their use of eDirectory. We will, however, support *you* as you support them.

We have made every effort to create eDirectory to be a trouble-free, easy to operate program, and we believe most of your members will have no trouble using the program.

If your members do experience trouble that you are unable to help them with, call us and we'll try to help you solve their problems with it.

End User Startup Notes

We've provided two pages of startup notes immediately after this chapter that you can duplicate and distribute to your church members if you wish that will give them basic instructions for setting up the eDirectory program on their home computer.

eDirectory Startup Notes

eDirectory is a computer based church directory program that displays information normally found in a printed church directory on your computer. It can run on any PC-compatible computer running Windows 95 or later.

Using eDirectory, you will be able to quickly and easily look up families or family members in your church, view the names, address information, phone numbers, e-mail addresses, and even see their picture if one has been taken of them for the eDirectory.

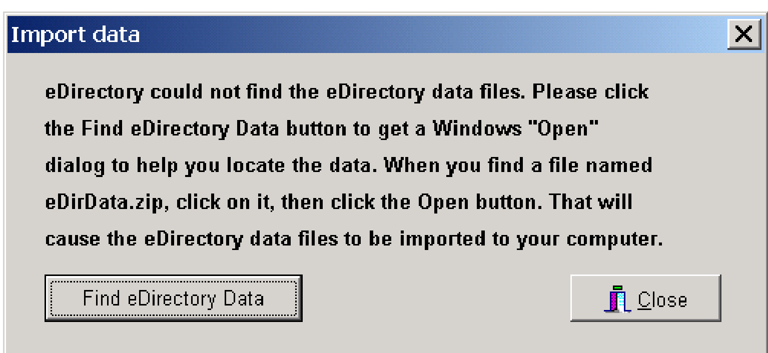
There is context-sensitive, on-line help once you have started up eDirectory on your computer. However, you'll need to use the following instructions on how to get the program up and running on your computer and how to access the data.

Getting the Program Onto Your Computer

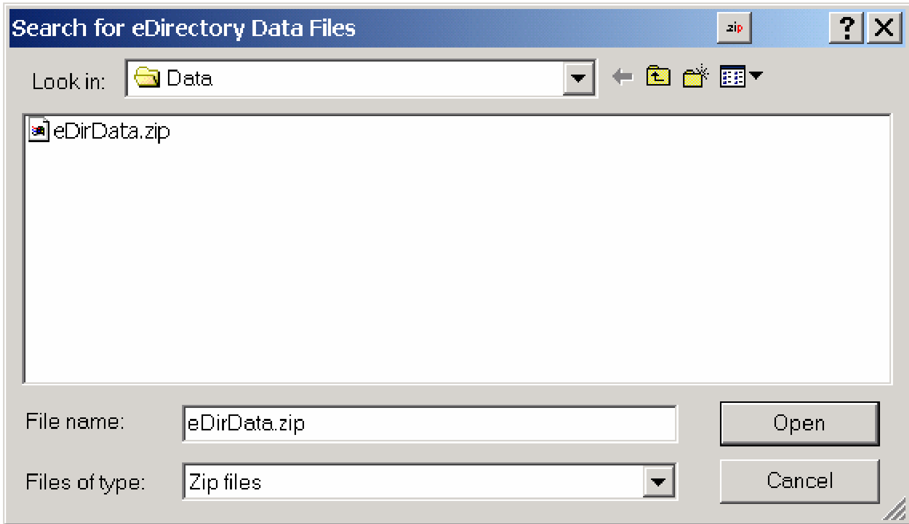
To get eDirectory from the CD onto your computer, follow these steps:

- Place the CD with eDirectory on it in your computer's CD drive.
- In Windows, click Start and then select Run.
- When the Run dialog appears, click the Browse button. Use the Browse dialog that appears to navigate to your computer's CD drive.
- When you have arrived at the CD drive, you'll see the eDirectory setup file. It's named **eDirSetup.Exe.** When you find this file, click on it then click Open. Or, if you prefer, double-click on the setup file name. Either way will return you to the Run dialog.
- Click **OK** on the Run dialog to start running the setup program.
- When the setup program appears on your screen, keep clicking **Next** to install the program. We recommend that you use the defaults provided for you in the setup program.
- When the setup program is finished, and with the CD still in your CD drive, find the **eDirectory icon** that was placed on your computer's desktop and double-click it. It will start up eDirectory. In most cases, the program will find your data and display it.

However, if you see this message on your screen...



...it means that eDirectory has not yet found the church directory data files it needs to display the information for you. Click the **Find eDirectory Data** button to see a standard Windows "Open" dialog that looks like this: (over)



In the example above, you'll notice that the **eDirData.Zip** file, the compressed file that contains the data used by eDirectory, has been located. Were this on your computer, you would now click on the file name and then click Open or double-click directly on the file name. Either way will cause eDirectory to unpack the data files and place them in its folder on your computer and then display the first name.

The next time you enter eDirectory, the data will already have been set up, so you won't have to do this step again.

Using the Program

Once eDirectory has found the data, you can use the program any time you wish. You can even make changes in the information if a church member changes address or phone numbers. Use the on-line help system for instructions on using various features in the program.

eDirectory is not designed to be a program that allows you to enter new families into the data file. However, your church can issue updates to the church directory at any time so that you can get all the new additions to your church family from time to time.

Getting Support

eDirectory is so simple to use you are not likely to ever need support. However, if you have questions about using the program or setting it up, please contact your church office for help.

Member Information Survey

Your church office requests the following information about your family. This information is for church office and pastoral use only. Thanks in advance for helping us keep our member information up to date.

Family Last Name ______________________________

Residence Address

____

____

____

Mail Address (if different than Residence Address)

____

____

____

Home Phone ______________________________

Can we publish your phone in the church directory? (circle one) Yes No

Which address should we publish in the church directory? (circle one) Residence Mail Do not publish address

Adult/Parent Information

Anniversary Date ____/____/____

______________________________ ____/____/____
Title Full Name Goes By Birth

______________________________ ____/____/____
Title Full Name Goes By Birth

Children/Dependent Information (please list in age order)

______________________________ ____/____/____
Full Name Goes By Gender Birth

______________________________ ____/____/____
Full Name Goes By Gender Birth

______________________________ ____/____/____
Full Name Goes By Gender Birth

______________________________ ____/____/____
Full Name Goes By Gender Birth

______________________________ ____/____/____
Full Name Goes By Gender Birth

______________________________ ____/____/____
Full Name Goes By Gender Birth

Please indicate activity and school information on the back of this page. Thanks.

Activity Information

Name	SS Class/Division	Talents	Activities	Church Offices

School Information

Name	School Name/Location	Grade