

The Church Membership Directory

Version 2009.1 Setup Notes and New Feature Documentation

The purpose of this New Features Guide is to document the new features and fixes in CMD 2009.1. Please read it over so that you will know what the new features are and how they work.

There are several major changes to a number of features, and you need to make a few quick changes in your CMD's preferences and configuration as soon as you install 2009.1. They are not hard, and full instructions are included here for what you need to do. **I guarantee you will have problems or questions if you do not take the few moments needed to set these preferences and configuration items!** The items I am referring to include: how CMD uses pictures, local preferences, help file type, and the font used on Contributions statements.

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If you need help with any part of the update process, including importing data from a prior version, please contact us for help!

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New Features Summary for CMD 2009.1

- When printing **mailing labels**, CMD now **eliminates duplicate labels** printed when both husband and wife match the selection criteria.
- The elimination of duplicates also now extends to postcards and envelopes.
- **The Interest File, our headline new feature**, allows you to track those who are interested in your church. Though the actual names and addresses are placed in the main CMD data file, the other fields that are specific to the interest file are stored in a separate file, and a page on the Interest File dialog allows you to print names in the interest file.
- **Video Training for the Interest File.** Six new videos will teach you how to use this new feature visually. Each video covers a different aspect of using the Interest File dialog.
- **Special Note:** As of this writing, the web service that warehouses the videos has a bug in their script. Their bug **does not affect your ability to view the videos**, however. When you call for a training video, a browser page will appear, and in a few moments you'll see the video displayed in the background. It's usually at this point the error message pops up. There is a choice on the message that you can click to continue (click Yes) and the video will play without difficulty. You'll need to click the large Play button in the middle of the screen to actually get it started. Hopefully they will remedy this issue soon.
- **The way CMD uses pictures has been changed! This is very important!** Even if you do not use pictures, you should complete the steps in this guide to establish the folder for pictures so that your configuration will be accurate. This is a late change in 2008, so I'm repeating it here in this new features guide for those users who have updated to CMD 2009 without having updated to 2008.
- **E-Mail Improvements:** You can now elect to send e-mails to an Outlook e-mail client, or you can send the e-mails to the Windows clipboard with either a comma or semi-colon as the delimiter. This will enable you to use e-mail programs other than Outlook to send your e-mails.
- **Events.** This is a bonus feature that I've included in this update if it's useful to you. At our church, we do a yearly resurrection pageant and we needed something to track all the participants. So I created Events as a special feature just for us. I include it in CMD 2009 in case you ever have a large scale program for which you need to track participants.
- **Video Training Expansion.** I had hoped to have more ready for this update, but I have been in the process of switching over to an upgraded computer which greatly facilitates the recording and producing of the videos, but I did not receive it in time to complete as many videos as I had wanted. However, I will be adding some new videos with each update in 2009, so more are on the way.

Getting CMD 2009.1 onto your Computer

If 2009.1 Is Your First CMD Version...

If you have never used CMD before and are starting with 2009.1, how you get it started depends on if you purchased CMD as a download or on a CD:

- **CD VERSION:** The setup program should start up automatically for you when you insert the CD into your drive. If it doesn't, run the **CMD2009.1Setup.Exe** program on the CD's root directory according to the instructions in the manual or in the Startup Notes.
- **DOWNLOAD VERSION:** If you purchased a download version of CMD, you will need to download the original CMD2009.1Setup.Exe. Instructions for accessing the download page would have come in an e-mail in response to your purchase.

In either case above, once you have CMD 2009.1 on your computer, you'll need to start it up and initialize it according to the instructions in the manual or in the Startup Notes.

If You are Updating from a CMD version prior to 2009...

Follow the instructions above for getting CMD 2009 initially onto your computer. Once that's done, start it up, and when offered the choice, select the Create New CMD File step to initialize the new CMD's data files. **Once CMD 2009.1 is initialized, do not attempt to simply backup data from a prior version of CMD and restore it into CMD 2009.1!** If you do this, you will introduce errors into your new data files for which you will have to call us for help in fixing.

Instead, use the **Import Prior CMD Data** option on CMD 2009.1's Utilities Menu to bring in data from a prior version. Specific instructions for doing this are in your Startup Notes.

Mailing Label/Postcard/Envelope Improvements

An important change was introduced for mailing labels in 2008.3, which has now been extended to postcards and envelopes.

In prior versions of CMD, you would get more than one label for a family if more than one family member matched the print criteria. Now CMD will combine names in such a way that duplicates in most cases should be eliminated.

One common situation in which these duplicate labels would be printed would be if both spouses were members of, say, the church board. Printing a list of labels would generate one label for each person. And, if you checked the **Include Spouse** box on the **Print Control** page of **Print Names**, then you'd labels that looked something like this:

John & Mary Smith
1234 Home Ave
Dallas, TX 76543

...and then...

Mary & John Smith
1234 Home Ave
Dallas, TX 76543

If you were counting the number of labels to indicate the number of envelopes you'd need, how many cover letters to prepare, board minutes and agendas to copy to be included, the extra labels could amount to enough extra time and trouble that they were a real nuisance.

Here's how the revamped envelope, postcard, and envelope printing works:

- If you do *not* elect to Include Spouse, CMD *will* include the spouse in those cases where *both* husband and wife meet whatever selection criteria you specified on the Selection Page of Print Names or in the Interest File.
- If you *do* elect to Include Spouse, CMD will print the name of the person who actually matched the criteria first on the label, except when you check the Use Titles box. In such cases, the husband will always be printed first:

Mr and Mrs John Smith

...rather than...

Mrs and Mr Mary Smith

- Note that additional labels or postcards or envelopes *will* be printed if a dependent in the family also matches the selection criteria. The above change affects only husband/wife label issues.

Interest File

CMD 2009 introduces a brand new feature, the **Interest File**. While you could use CMD already to track interests, as many of you have been doing for years, the Interest File feature provides direct and specific fields to hold information about interests that doesn't neatly fit into other fields in CMD.

In addition, having the interest tracking functions brought together in one place will make it easier to work with them.

To get to the Interest File dialog, you may...

- Click the Rolodex icon on the speed button bar (it's just to the right of the Printer icon)
- Click Tools | Interest File
- Use the Preferences | Startup Function choice to tell CMD to start up each time displaying the Interest File dialog

If you have used CMD extensively in the past, you'll notice the similarity of this dialog with the **Enter/Modify/Delete Names dialog**. Indeed, its basic flow and function is modeled after it.

That means that the upper portion of the dialog contains the information common to all members of the family, and the lower portion of the dialog contains the information that is specific to each member of the family.

If you are new to CMD, and to refresh those of you who are experienced with CMD, here are a few important things to know about entering family information:

To Add a New Family

Always click the + button on the navigation bar when you are ready to enter a new family. This will clear the screen if there is already a family displayed there, and will create a new entry in the family data file. The cursor will automatically be placed in the Family Name field, ready for you to enter your first line of information.



Interest File Fields

Family Name field. Always enter the Family Name field something like this:

Smith, John & Mary

Do not enter just the last name, or CMD will give you a message asking you not to do that. It's important to enter the Family Name in the way proscribed here because it impacts the way CMD looks up and prints family units in not only the Interest File, but also in other parts of the program.

Once you have finished entering the Family Name information, press Tab to move to the next field.

Street Address fields. There are two blanks provided for the street address. If the address you are entering only requires one line, always enter it on the first line. If it requires two lines, always put the actual delivery address on the 2nd line (postal service rules...). There are 40 characters available for each of the two street address fields.

City/State. These two fields are "history lists", meaning they remember the entries you've made before. When you begin to type in an entry that either city or state has seen before, the rest of the word will be placed in the edit box automatically for you. To use the word presented for you, you do not have to complete your typing. Just press Tab and the word will be entered for you.

If you find a word has been misspelled or you do not wish to have CMD present this word to you, double-click anywhere in the white area of either field, and a List Maintenance box will appear. Use this box to remove, correct, or add any desired city or state names.

Zip Code. Enter a standard US zip code, or Canadian postal code. The field can also hold most postal codes from other countries as well

Map. This field holds up to 8 characters that you can use to store a map coordinate from any mapping system you use. Note that you can display an internet map of any valid address by clicking the Map button located just under the word Address above.

Home Phone. Enter the home phone including area code.

Family Comments. Double-click anywhere in the white edit area to gain access to a larger dialog in which you can enter up to 64,000 worth of comments.

Connection of Interest File Names to Main CMD Data Files

At this point it would be appropriate to mention that the actual name and address information that you enter in the Interest File are stored in CMD's main data files. To help you quickly identify Interest File names when working in the Enter/Modify/Delete Names dialog, we've added a flag located just above the Label Text field that will alert you. It looks like this:

We provide this alert because you will see empty fields down below and you might be tempted to fill some of them in. It's a good idea to leave those fields empty, though, or your interests will be included with the lists and reports you generate unless you specifically include Members as a selection in Print Names.

Adding Family Members

You should *always* enter at least one family member for every family! Also, note that we suggest that you enter family members in husband, wife, and then children in age order. If there is no spouse, then enter the adult in the family first, followed by children if present. You can change the order later, but getting it right at this point will save you time later on.

To add a family member, click the Add New Family Member button located in the lower right corner of the family information area up above. You cannot just start typing directly in the fields in the area where the individual's name and other information goes. You *must* use the Add New Family Member button to open up space for a family member.

When you click Add New Family Member, a menu of choices will appear. Select the type of family member that you are adding. After making your choice, the lower 2/3rds of the screen will open up, and your cursor will be placed in the Titles field.

Titles. Use the drop-down field to select a title from the list, or you can leave it blank or even type in a title that's not on the list if you wish.

First Name. Enter the individual's formal first name. When you press Tab after making this entry, CMD will automatically place the last name in the Last Name field (one of the benefits of enter the Family Name field as we suggested above), and also place the First Name in the Goes By fields. As you tab through the name fields, you can change any of these that need to be

changed. If they are ok, just keep pressing Tab to move on to the other fields.

Other Name Fields. Enter each name field for which you have information. You can come back later to update any of these when you get more information.

E-Mail Address. You have up to 40 characters to enter the individual's e-mail address.

Work/Cell Phones. Enter these phone numbers if you have them.

Marital Status, Family Status, Gender. Select from the drop-down list. Some of these fields may be filled in for you based on the type of family member you selected when you clicked the Add New Family Member button.

Occupation. Enter up to 40 characters for the individual's occupation. Check the Retired box if appropriate.

Note that although these fields are duplicated in CMD, the Marital Status, Family Status, Gender, and Occupation fields on this dialog are stored in the Interest File so that this information will not cause your interests to be included in lists you select in Print Names.

Date of First Contact. This date records the date you first became aware of someone's connection with your church. You can type in the date directly, or you can select it from a pop-up calendar by clicking the small calendar icon on the right edge of the edit box.

Last Visit Information. The date and the type of the last visit made to this person will be display here. To add a new visit, click the Visits button. See the on-line help or the printed manual for help with recording visits.

Interest-Specific Fields

The following are fields unique to the Interest File, and are fields not duplicated anywhere else in CMD.

Religious Background. This is a free-form field, meaning that you can type in a brief description of what you might know of the individual's past religious affiliations and beliefs.

Source of Interest. Select the source of interest from the drop-down box. A set of default choices are provided for you when you first start up the Interest File feature, but you can change any or all items on this list. To edit the list, double-click directly in the edit box and a List Maintenance dialog will appear. You can add items, delete them, sort them into alpha order by the click of a button, or you can drag-and-drop to reorder the list in any way that you want.

It is also a "history list" which means that it will remember any new item that you type into it which will then be automatically added to the list.

You may select one item from this list.

Degree of Interest. Similar to Source of Interest, this field tracks how interested you gauge the individual to be. To alter this list, double-click anywhere in the edit box. We provided two different types of rating systems, and you are free to use either or create one of your own. You may select one item from the list.

Learning Activity. Similar to Source and Degree of Interest, this drop-down list shows various types of learning activities in which an interest may be involved on their journey toward faith. We provide some defaults for you, but you can double-click anywhere in the edit box to edit the

list. As with the prior two fields, you can select any one item from the list of possibilities.

View button. Clicking the View button takes you to the Christian Learning dialog where you can check the progress of the current name in their learning experience if you've been tracking one for them. See the Christian Learning on-line help or the printed manual for more information about Christian Learning.

Decisions Made. While also a menu field, this field is different than the prior three fields in that you can select any number of the menu items to be saved for any given name in your Interest File. That means we have to present the list for you a bit differently. When you first come to it, the drop-down box will be empty. To select items for this field, click the Select button just to the right of the field.

This will open a small dialog that will present a list of possible choices on the left, with your choices listed on the right. To add an item to your selections, click on it in the left column, then click the Add Picks to List button. Note that you can select more than one item by holding down the Ctrl key while you make your selections.

You can remove items from the list by clicking on the item to be removed in the Your Selections column and then clicking the Remove Selected Item button.

To modify the list of Decisions, click the Edit Pick List Items button in the bottom center of the dialog.

This field will make it easy for you to see at a glance how a person is tracking through a learning process. The defaults we provided were only intended to get you started. Place whatever guideposts are important to you on this list.

Materials Received. This field functions exactly as the Decisions Made field does, except that this field tracks any materials you might have provided the individual. The defaults we have provided will give you a head start in thinking up your own list.

Pastoral Contact. Type in the name of a pastor who is designed as the contact for this individual. This is a history list field.

Lay Contact. If you assign interests to a lay person as a contact, you can enter them here. This is a history list field, and you can also click the icon with the glasses just to the right of the field to see a list of names in your CMD file from which you can select the contact.

Comments. You can enter comments specifically for each individual in the family if you wish. Double-click within the edit area to get a larger dialog to work with. As with the Family Comments field, you can enter up to 64,000 characters of comments for each person in the family.

Visitation, Attendance, Preferences button. Click this button for access to the visitation record for this person, their attendance record, and another way to get to the dialogs that allow you to maintain the various menu fields.

Print Names in the Interest File

The Print page of the Interest File dialog allows you to print lists based on the interest fields saved for the individuals in your file. For the most efficient operation of the printing functions, we suggest that you use the following flow: select the names for printing, select the output form, set the parameters, then begin printing.

Select Names for Printing

Always start here. Before you can print anything, you have to tell the program exactly who it is you wish to print.

- Select **All Names**, and every name in the Interest File will be printed
- Select **Individuals**, and a dialog will appear when printing is initiated that will allow you to pick any individuals from the list of names saved in your Interest File for inclusion for your list
- Select **Field-based Selections** if you wish to base your list on various fields in the Interest File

Field-Based Selections

When this item is selected, five Interest File fields become active below it from which you may select your criteria. For example, if you wish to print only those names that are associated with a particular pastoral contact, click the check box next to Pastoral Contact, and select the pastor from the drop-down list. Only those names who were saved with the selected pastoral contact will be printed. You can select from any of the other available fields in the same way.

One important feature of CMD is the capability to select any of these fields in combination with any other to more specifically hone your list. For example, if you could ask for a list of all names assigned to Pastor Jones who have a High degree of Interest who became an interest because of your VBS program and who have already accepted the authority of Scripture. Just check each of those fields and make those selections on the drop-down list, and CMD will print only the names that satisfy each of those criteria.

This means you can have a wide array of selection choices when printing your names.

Output Forms

The next choice you should make in your work flow is the Output Form—that is, the printed form the names or other information will take. Each output form has a different set of choices that need to be made once you've selected it.

Mailing Labels. You can select from among 3 types of labels: two up, three up, or Dymo LabelWriter labels. If you choose Dymo, you'll have other choices to make, and those are detailed in the on-line help.

For the 2-up or 3-up labels, you can even choose a starting label number if you are starting with a partially used sheet of labels.

Envelopes. You can print either continuous or single-feed envelopes, and a check box will let you indicate whether or not you wish to print the church's return address on the envelope as well. Click the Envelope Preferences button to set the CMD's general preferences for envelopes.

Address an E-Mail. Use this option if you want to generate an e-mail. You can use the drop-down box to select whether or not you wish to send your e-mails directly to an Outlook e-mail client, or to the Windows clipboard with either a comma or a semi-colon between each address in case you need to use a different e-mail program or system.

When you select Outlook, a few seconds after the printing is “finish” the Outlook dialog will appear. Note that on some systems, you may be asked for permission to access the Outlook mail program. Always say Yes. When Outlook opens, the e-mail addresses will be in the BCC line (so the other addressees can’t see the others’ e-mail addresses), and you can then type in the message.

After you click Send, the e-mail client will disappear and you will be returned to the CMD. **You must go into Outlook after this to actually send the message. It stays in your Outbox until you do.**

Full Information. This form prints everything about a person or family that is stored in the interest file. You can elect to print these forms one page per individual or family, and you can determine whether or not you want comments to be included as well.

Name and E-Mail List. Use this option to print a list of names with their e-mail. You may also use this form to print a list of names without e-mails so that you can easily tell who you need to contact to get an e-mail address from.

Name & Phone/Name, Address, Phone List. Indicate which phone numbers you wish to print, and also if you wish to have the e-mail address included.

Visitation Forms/Cards. The choices here are the same as the ones presented in Print Names, so we’ll not duplicate all of that information here. You can consult the on-line help or the printed manual for more detailed information.

Mail-Merge. To send your names to a disk file for use in another program, select Mail-Merge. When selected, you’ll see a number of fields that you can check or uncheck depending on what you want included in your list.

This form can only be sent to a disk file, so when you click Begin Printing, you’ll be prompted to provide a file name and location for the file. When the file is printed, it will be in CSV format, which means “comma separated values” which most any program such as Word, WordPerfect, or Excel can read without difficulty.

Name Count Only. Use this when you just want a head count of those who match the criteria you have specified.

Set Parameters

Depending on the Output Form you select, various parameters will be available to you. Most of them are self-explanatory, but there are a couple that are worth noting.

One Label (or Envelope) Per Household. If both husband and wife match criteria for your list, both names will be printed separately unless you check this box. If you do, husbands and wives will be printed together if they both match the criteria, otherwise only the individual matching the criteria will be printed.

Address E-Mail if Available. This is a special function and is only available when the output form is either mailing labels or postcards. When this item is selected, CMD will print either labels or envelopes for those names who have no e-mail address, and will prepare those who do have e-mail addresses for sending to Outlook or to the Windows clipboard.

Note that the total number of names that are reported to have been printed includes both those who actually get printed and those whose e-mail addresses are sent to Outlook or the clipboard.

Case Status. This allows you to make some or all of the name and address upper case. It's often desirable to print the Last Name in upper case when you are printing lists that also invert the name.

Return Address. The return address is only used on this form when printing envelopes. If the Return Address drop-down box is blank, you will need to leave the Interest File dialog and go to CMD's Preferences Menu | General Preferences, and select the Return Address tab to define the return address.

Page Headline. Enter a page headline for use with any of the list forms. A page headline will also be printed on labels, so make sure this field is blank unless you intend to include a header line on each label.

Printer and Font Selection. If you need to print to a different printer than one that is shown, click the Select button with the printer icon on it.

To select a different font for the list, click the Select button with the Fonts icon on it.

Use caution when selecting fonts. Most of the forms available here were set up specifically to look right with Times New Roman, 12 pt. Change the font may result in an undesirable printed report.

Setting the Destination and Initiate Printing

The last choices to make are to tell CMD where you want the list to be sent, and to actually begin the printing.

Depending on the choice of Output Form, the destination options will be set. However, whenever possible, we recommend that you send your list to the Screen for preview first before you use real paper or label stock. This way you can make any adjustments if needed and then print the list again to make sure it's what you want it to be. You can click the Printer icon near the top left corner of the Preview Screen to send what's on the screen to your printer if it meets with your approval.

Note that there might be some extra spacing here and there between some letters in the preview that will not be there in the printed form.

When all the choices on this page are like you want them, click Begin Printing to actually initiate the printing. Most print jobs go very quickly, and you may not even get a chance to click Abort Printing if you realize you printed a list by mistake. If you printed to Screen first, you can just close out the preview, reset the parameters you need, and then print again.

Video Training for Interest File Use

Click the small video camera icon just to the left of the Find Family button to see a list of available training videos for the Interest File feature. These videos are the easiest way to learn to use the Interest File dialog.

These videos are all web-based, so you'll need a good connection to the internet and either speakers or headphones connected to your computer.

I narrate the videos personally, and walk through many of the operations of the Interest File feature. When you select a video, it will take a few seconds for it to get to your computer, but generally the wait will be less than 15 seconds. Click the Play button in the center of the video when it finally appears.

If you get an error message when the video first arrives, click the Yes button to continue anyway. There is no problem actually playing the video. This is an error from the web site that hosts the videos. They are working on a fix for it, and it may be taken care of by the time you read this.

But as I said, the error message will not stop the video from playing correctly. I strongly urge you to watch through these videos as they may well save you time in the future.

E-Mail Improvements

Even though these improvements have been alluded to in the Interest File material above, it's worth repeating that material here and adding some new information as well.

CMD now allows you to send your list of e-mail addresses to Outlook, and also the Windows Clipboard with either comma or semi-colon delimiters. The means of selecting this is somewhat hidden, so you'll just need to take note of it here so that you can find it when you need it.

On both the Interest File Print page and the Print Names Print Control page, there is a check box choice that says...

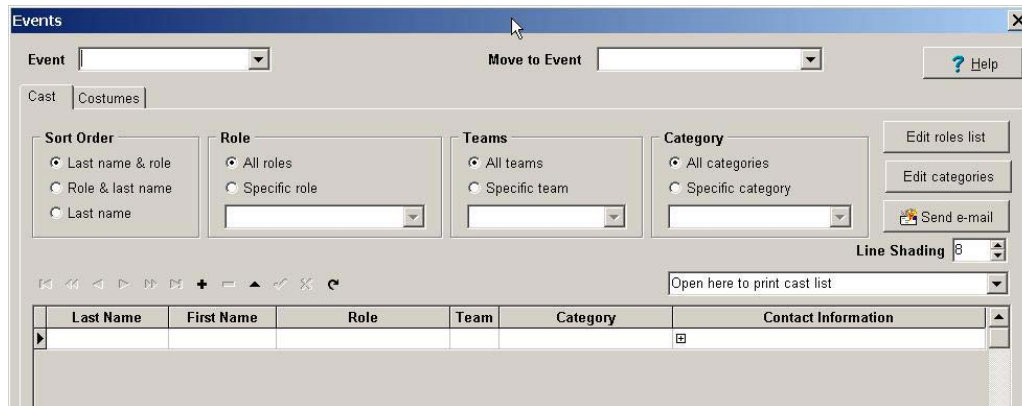
Address E-Mail if Available

That's the check box you click if you want to send an e-mail when labels, postcards, or envelopes are printed.

To get to the E-Mail Setup dialog, **right-click** directly on the Address E-Mail if Available check box and the **E-Mail Setup dialog** appears. From there you can select Outlook or either of the Windows Clipboard options. The option you select will remain active until you make a new selection on the E-Mail Setup dialog.

Events

Another new feature accessible on the Tools Menu is Events. The dialog looks like this:



The bottom part of the screen has been truncated here to save space because there is nothing there to see at this point.

Events was written to help us track a large cast and crew for our church's annual Resurrection Pageant, but would be useful for most any large program.

It enables you to set up virtually any number of events (just type in the event name in the field in the upper left corner) and then start entering names.

To enter a new name, click the + button on the navigation bar just above the list of names. That will put the cursor in the Last Name field of the grid. You can either type in the name, or if the name is in your CMD file, click the icon to the right edge of the field and you can select the name from the list. The name's phone and e-mail fields will be drawn from the CMD record if you have such information stored there, or you can click the little + icon in the Contact Information field to enter home, cell, and e-mail information directly there.

The Role field is a drop-down list of all the character roles you wish to track in your Event. This is a completely definable list, though I've provided our defaults for you here to give you an idea. To edit this list, click the Edit Roles button near the upper right corner of the dialog.

The Team field allows you to divide up your cast into teams (we've had as many as three teams in our pageant).

The Category field allows you to define if the name has a major or minor role, a speaking or non-speaking part, a support role, director's role, or any other type role in your production.

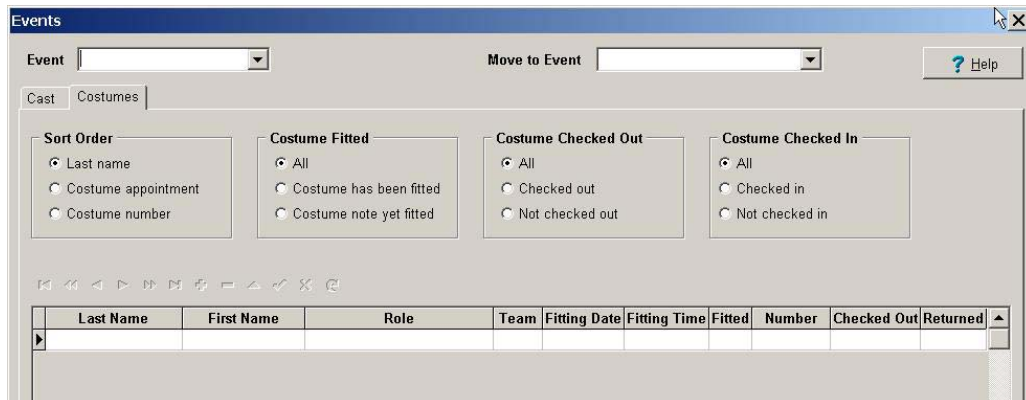
There are several filtering options above the list of names, which you can use to narrow down your list for quickly sending and e-mail or printing of a list. The list or e-mail will be based strictly on the list of names showing on the names list at the time based on the filtering selections you make.

The Move To Event drop-down box allows you to specify (just by typing in) a new event when you are ready to start tracking names for the next event you have. This enables you to quickly move over some names from a different event to the new one.

To move a name from one event to another, find the name on the list, click on it to select it, then right-click the name and a pop-up will ask if you wish to copy the name to the new event that is selected in the Move To Event drop-down box.

Costumes

Yes, Events even helps you track costumes. When you click the Costumes tab page, you'll see this:



When you select Costumes, you'll see a different grid of the same names you see on the Cast page.

Note the various fields after Team that allow you to set fitting appointments, track a costume number, when it was checked out, and if it was returned.

This is a feature in constant development, and I'm willing to accept suggestions for adding to its usefulness and feature set. If you have some needs for your event that are not covered here, please let me know and I'll consider your suggestions for future versions.

Church Directory Changes

Format B/Pictures Intermix

If you wish to intermix pictures with normal church directory information rather than have to print pictures in a separate section, you can now select **Format B with Pictures** as an option on the **Directory Format** combo, which is available when you select **Church Directory** as the **Output Form** on the **Print Control** dialog of **Print Names**.

This format prints the family picture just above the full name and address information normally printed with Format B. If there is no picture available, CMD prints normal Format B name and address information.

The Pictorial and Pictorial Directory with Phone Numbers printed in 3 columns. For Format B with Pictures, you can select either 1 or 2 column printing on the Page Setup dialog.



5.5 x 8.5, One Family Per Page

This option (seen in the above right list of Directory format options) prints a single family on one 5.5 x 8.5 inch page. This new feature was created in response to a specific request for this format, so it has been set up for the needs of the requesting church. However, we've tried to design it so that it will be useful for all our users. Please feel free to comment on this new form so that it can evolve to fit as many needs as possible.

Designed to be printed on half-page size paper with holes punched to be placed in a small notebook, this makes a convenient method of distributing your church directory. Initially, you'll need to print pages of each family for each member family's directory notebook. Adding new families to the directory later on is easy because you need only print the new pages for new families, which your members can then simply insert into their personal directory notebook. This means you can constantly update your directory without having to print new directories for everyone.

There are a few specifics that will be useful to know about this form:

- **Font sizes and styles** have been **pre-chosen** due to the precise nature of the fit of the information on the form.
- **Several Print Control parameters affect the form:** Name Formality, Area Codes selection, and Status Markers. On the Page Setup dialog for Church Directory, the Left Margin parameter controls the left margin for this form, and the Orientation parameter may be used to feed the page landscape into your printer if needed. All the other margins are set automatically.
- You can use a full letter-sized sheet for this form, but you'll need to cut full pages in half before you distribute them. If you wish to use pre-cut half page size forms, try printing a few pages cut down to the correct size to make sure your printer can handle a form this size *before* you invest in pre-cut pages!

- **Birthdays and anniversary dates** (month and day only) are printed for each member of the family—parents and up to six children.
- There are **header bars** that are designed to be printed under each general heading on the page. The darkness of the header bar is determined by the value in the **Line Shading** item on the **General Preferences** dialog. A value of 10 is suggested as a starting point. Adjust up or down as needed based on how your printer shades the header.
- The items under the **Special Interests** header are drawn directly from the **Activities** menu field. All the items are combined from each member of the family with duplicates eliminated. No designation is given regarding which family member likes which activity.
- **Driving Directions** are drawn from the Family Comments field, but you must insert a special marker so that CMD will know where to look for it. That marker is:

~DIR~

You *must* use Upper Case, and the two ~ characters are required as well. You should also make this the very last words in the Family Comments field, as CMD will assume all text after ~DIR~ until the end belong in the Driving Directions section.

In 2008.4, this new directory form may receive some alterations: addition of a choice to use Activities, User 1, or User 2 for the Special Interests section, and also an option of whether or not to personalize each family member's special interests. And in the next year's CMD update, we will likely add a new field to be used specifically for driving directions so that you won't have to use the Family Comments field for this purpose. For now, however, the Family Comments field is what you'll need to use.

Name Only

The final new church directory format option in 2008.3, Name Only prints the name information that would normally be printed with Format B with no additional information.

If there is a value in the Tab Space field in the box directly under the drop-down box where Name Only is selected, that is the value that any dependants in a family will be offset from the parents' line.

Note that some basic formatting options are retained such as Last Name in Bold, Use Titles, Invert Name, Name Formality, etc.

Pictures in CMD—This is Important!!!

Though the size, resolution, and dimension specs have not changed in 2009.1, there *is* **an important change in the use of pictures that came at the end of 2008**. The change was made because of the large file sizes that resulted from the insertion of many pictures into CMD.

Though it is easy and more convenient in many ways to program CMD so that you can insert pictures directly in the CMD data file, in practice the resulting large file sizes have caused **problems for the backup/restore routine** in CMD, making it almost impossible to pass data back and forth between computers. It also caused some problems in the backups themselves.

The solution, implemented in 2008.3, is to **remove the pictures from being physically a part of CMD's core data records** of each family and/or individual, and place them in a **separate folder** on your computer. CMD will then call the pictures into memory and use them as they are needed.

In practice, you will not notice any real difference in the way pictures are stored and used, except that your **core data file size will be reduced dramatically**, once again enabling you to easily pass data back and forth between computers.

There is a separate backup/restore process for pictures for those times when you want to be protected from loss or when you wish to move them to other computers as well.

The process of changing your pictures over to CMD's new way of handling pictures is easy and straightforward. Please don't hesitate to complete the following steps.

Do This First—Please!

Before we walk you through the simple process of changing over your pictures, **stop and make a backup of your current CMD data**. If you have only a few pictures stored in your CMD file, a normal backup will do. However, if you have a data file that has grown to anything over about 10MB, we suggest that you use Windows Explorer and create a copy of the CMD's Data folder either on your desktop or under another folder on your computer, or onto a CD-RW or flash drive. If you use a flash drive, remember to use the Windows item on the System Tray to stop using the USB device before you unplug it or you may lose some data in the copy.

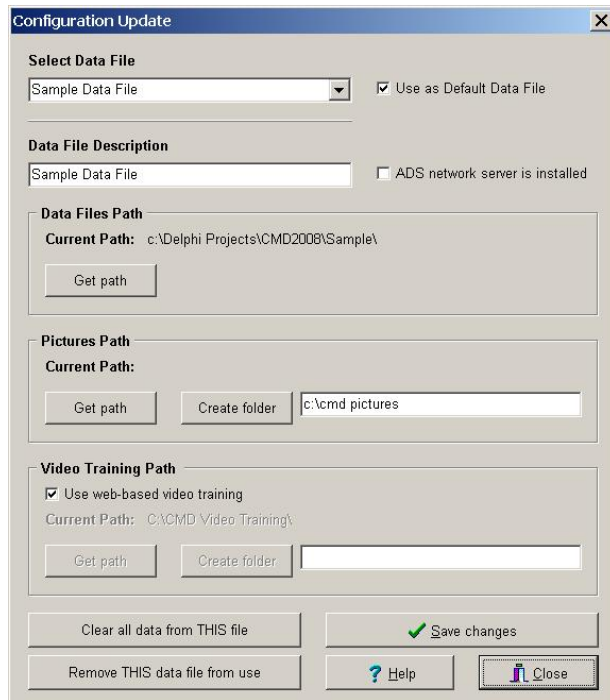
Please don't neglect to make a backup! If you should have any difficulty transferring your pictures for use in CMD 2008.3, a backup will help me help you fully recover.

Here's What You Will Do

To use pictures in 2008.3, you will need to do two things: You will need to create a separate folder for pictures that CMD "knows" about, then you will need to transfer any current pictures you have in your file to the new pictures folder. We'll walk you through both steps. They are not hard—but you will have to follow the steps precisely.

Creating a Folder for Pictures

The first task is to create a folder for the pictures. As you create it, CMD will learn where the folder is. If you already have a folder for your pictures, your only task here will be to tell CMD where that folder is. Either way, the process uses the **Configuration Update** dialog, accessed when you click File | Configuration | Configuration Update. When the dialog appears, it will look like the screen grab on page 9:



About half-way down the dialog, there is a section labeled **Pictures Path**. If there is no path and folder name to the right of Current Path, then you need to specify a folder and path name.

If there is already a folder in existence that you have created that should be used for pictures, then all you need to is click the **Get Path** button to find the path.

We **strongly suggest** that you type in...
c:\cmd pictures

as your folder name, then click the **Create Folder** button.

If you wish to place the pictures folder under a *different* folder, then use the **Get Path** button first to find the path, and then type in the new folder name and click Create Folder.

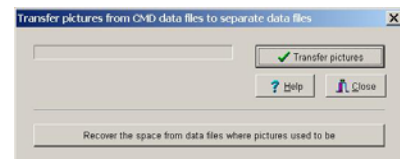
Unless you are storing your CMD data on a network server that all computers access, we strong suggest that you use C:\CMD Pictures as your drive, path, and folder designation. We suggest this because when you update your CMD program for a new year, your pictures can remain in the same folder, and you'll only need to tell the new CMD where to find them. And it makes it easy for us to find them should you need help with your pictures in the future.

If you *are* using CMD on a network, you will want to create a folder on your network near where your CMD data is located for the pictures. If you followed our advice and set up a folder on your network named CMD Data under which any specific data folders were created, such as CMDData2008, then you should create the CMD Pictures folder under CMD Data.

Transferring Pictures

If you have pictures already in your CMD file, they can be **easily transferred** from your CMD data files to the new picture folder once you have created it with the steps above. You *must* transfer your pictures to the new folder or they will not be visible to CMD 2008.3.

To make the transfer, click Utilities | **Transfer Pictures from CMD Data File**. The dialog that appears gives you two buttons to click for this process. First, click the Transfer Pictures button. This will make a copy of all your pictures in the pictures folder you created above. A name for each picture will be derived from the Family Name field for each family, and from the Goes By and Last Names for individuals.



The second button, which when clicked will wipe out the pictures from the data file and recover the space they take up, should *not* be clicked until you have double-checked to make sure the pictures have successfully transferred.

The best way to check is to print a church directory in one of the formats the prints a picture. We suggest that you print a Pictorial church directory and look it over carefully to make sure that the pictures appear to match the names, and that pictures you expect to see there are indeed there.

Once you are satisfied, return to the **Transfer Pictures** item on the **Utilities Menu**, and click the button that **Recovers the Space** in the data files. **Make sure you do this step! If you don't, you won't recover the bloated space in your CMD data files from the way pictures were stored before! That means you data file backup will still be huge!**

If You Have Trouble...

Should you encounter an error when recovering the space, exit CMD, re-enter it, and try to recover the space again. If you still have trouble, don't panic! It just means there's so much picture data in your data file that CMD had trouble handling it. There are a couple of additional things we can do to recover this space for you if you have a problem, but we'll need to help you directly with it. Don't hesitate to contact us for help if you need to.

Adding New Pictures to CMD

The actual process of adding pictures to CMD has changed little. You will still use the same dialog to find, select, and then save the picture to the CMD file.

The main difference is that when you prepare a picture for inclusion in CMD, **make sure that you save the new picture in the C:\CMD Pictures folder you created above!** Do NOT save CMD pictures in different places on your computer! ***CMD remembers only one pictures path.*** The file name for the actual picture is the only thing that is stored now in the CMD data file. So all pictures *must* be located in the same folder!

When you name the file, name it so that it will be easy to find when you need to tell CMD about the picture because you may end up with hundreds of separate picture files! We suggest that you use file names that are similar to the Family Name field information you would enter.

The name you choose may not exceed 30 characters, and should not contain a slash or comma! There is no boundary in your photo editor to make you adhere to these limits, but you will have trouble with your pictures if you do not watch this carefully! This limit includes the dot and the extension, so account for that when you name the file.

We will increase the length of this field for CMD 2009, but we will need to limp along with this limit until then.

Pictures in Name Search and List Family Members

Family pictures have always been available in the **Name Search** dialog that appears when you click Find Individual on Enter/Modify/Delete Names. It's also been available when you view the List Family Members dialog.

In 2008.3, these two dialogs now provide **access to individual pictures** you have saved for individuals in your file. On both dialogs, a button is provided that you can click that gives you access.

Backing Up and Restoring Pictures

The Backup and Restore dialogs have been updated to provide for separate backup and restore operations for pictures.

Remember that CMD can directly backup onto media such as a zip drive, a hard disk, a flash drive, CD-RW, and DVD-RW. Note that CD-RW and DVD-RW discs must be formatted already in order for CMD to backup to them.

CMD cannot directly back up to CD-R or DVD-R type discs. These require the use of separate “burner” software. So do not attempt to backup directly to these media or you will get error messages. If you wish to use CD-R or DVD-R media, backup first to your hard drive, then use the burner software to burn the backup file you’ve created on your hard drive onto the CD or DVD.

Both Backup and Restore provide separate utilities for pictures. They must be backed up and restored separately from your regular CMD data. Part of the intent of changing the way pictures work in CMD is to eliminate the problems users were having when backing up or restoring large data files. Since the process of backing up pictures is now separate, your CMD data files will be smaller when backed up.

Note that we’ve engineered this change to allow you to use CMD data with or without pictures present. It should function normally—except of course that if you do not have pictures on the computer using CMD, no pictures can be displayed! Otherwise, you can use the data as needed.