Startup Notes for Basic CMD 2017.x Setup

The basic 2017 version of the Church Membership Directory (CMD) software system includes two version of CMD (Classic & FMX), two phone apps (one for staff use and one for member use), the web server software required to power the phone apps, and the Tools program.

The following instructions will guide you through setting up your new or updated CMD 2017 program along with how to import any data from a prior version of CMD. The steps are not difficult, but they must be followed in the correct sequence. The entire process should take no more than a few minutes. It will take longer to explain it than to actually do it! Just follow the steps in order and you should be fine.

Do This First!

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

Step 1: Download Setup Files

Go to this page on our web site:

www.softwareforministry.com/html/cmd2017downloads.html

Once on this page, download these two files:

CMD2017.xSetup.Exe

CMD2017ToolsSetup.Exe

Note: Do NOT run the CMD 2017.xSetup.Exe program until told to do so in the flow of these instructions!

If you get warning from Windows about the programs being unknown and possibly unsafe just after the download, click whatever buttons allow you to ignore the warning. Microsoft just doesn't know about CMD, so they don't realize that CMD is safe for your computer.

Step 2: CMD 2017 Tools Setup

Run **CMD2017ToolsSetup.Exe** setup program by double-clicking on it in your computer's Downloads folder. Click the buttons to continue through the setup process.

Special Note: Some anti-virus programs will take exception to the CMD Tools program and attempt to block it (or in the case of Norton products) completely delete it. They react this way because the CMD 2017 Tools program has code in it that starts/stops and installs/uninstalls the Windows services required for the phone apps. Your anti-virus program doesn't know that CMD Tools is safe because it *only* accesses those Windows services that are part of CMD. If your anti-

virus software blocks or removes it, you will need to temporarily turn off your anti-virus software and rerun the Tools setup program. In some cases, you may even have to download it again first.

If you have never used the phone or tablet apps and have never started the web server, you can skip to Step 4, CMD 2017 Setup. Otherwise, continue…
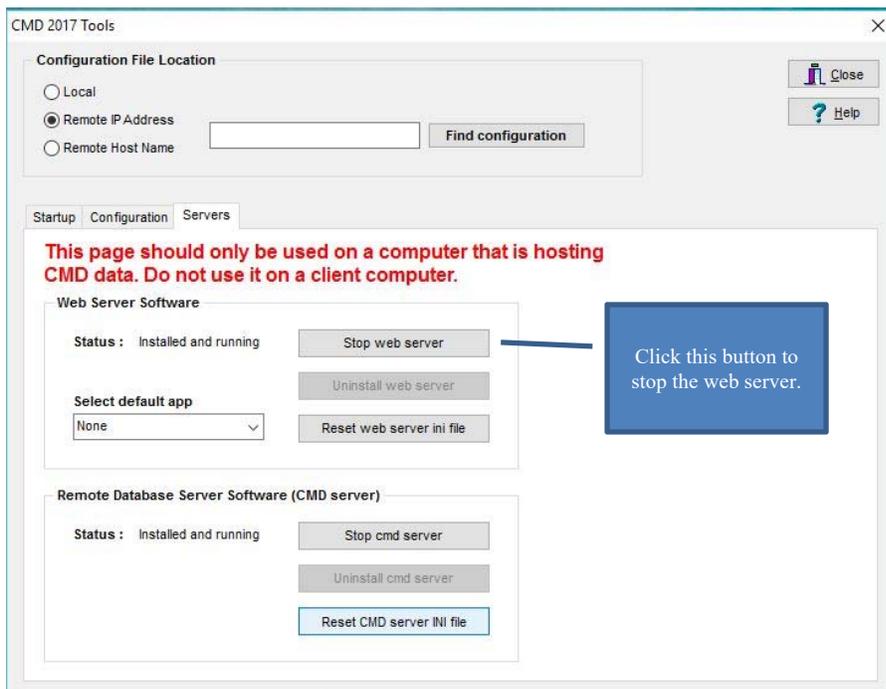
Step 3: Stop the Web Server

If you have been using the phone apps and/or the tablet apps with *any* CMD version since 2013, you will need to temporarily stop the web server on your computer *before* you run the CMD2017.xSetup.Exe program.

To temporarily stop the web server, you will need to startup up the CMD 2017 tools program for which you just ran the setup program in the previous step.

In order to do this, you must start up CMD 2017 Tools in a specific way. Instead of double-clicking the CMD 2017 Tools icon, instead, right-click on it and select the option from the menu that says Run as Administrator.

When the CMD 2017 Tools program is running, find and click the Servers tab and note there are two boxes on this page, one referring to the CMD Server (which you can ignore – it's not included with the basic version of CMD 2017), and the other one, the one nearest the top of this page, refers to the CMD Web Server. Inside the box for the CMD Web Server, there will be a button you can click to Stop the Web Server:

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

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

Step 4: Running the CMD 2017 Setup program

Only now should you run the setup program for the actual CMD 2017 program. Note that when you run the setup program, you will be prompted to enter a password. You will have received this password from Software for Ministry in an e-mail. If you have lost it, contact us and we'll re-send it to you.

To run the setup program: find the **CMD2017.xSetup.Exe** file in your computer's Downloads folder and double-click on it. Enter the password, and then click the buttons to keep continuing through the setup process.

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

The setup program will place two versions of CMD 2017 on your computer:

- **Classic**: This is the CMD you've known and have been using updated for 2017. All of the features you are used to in CMD are there. You can use it as you always have.

- **FMX**: This is the CMD reboot for 2017, which is the basis for the Mac version of CMD, which we believe will be available during 2017. While now almost completely built out, the FMX version lacks only a very few functions yet contained in Classic. We highly recommend that you use FMX as much as possible, reverting to Classic when needed for those very few functions not yet implemented.

Note that you can freely switch back and forth between the Classic and FMX versions as desired since they work with the same data and the same startup information.
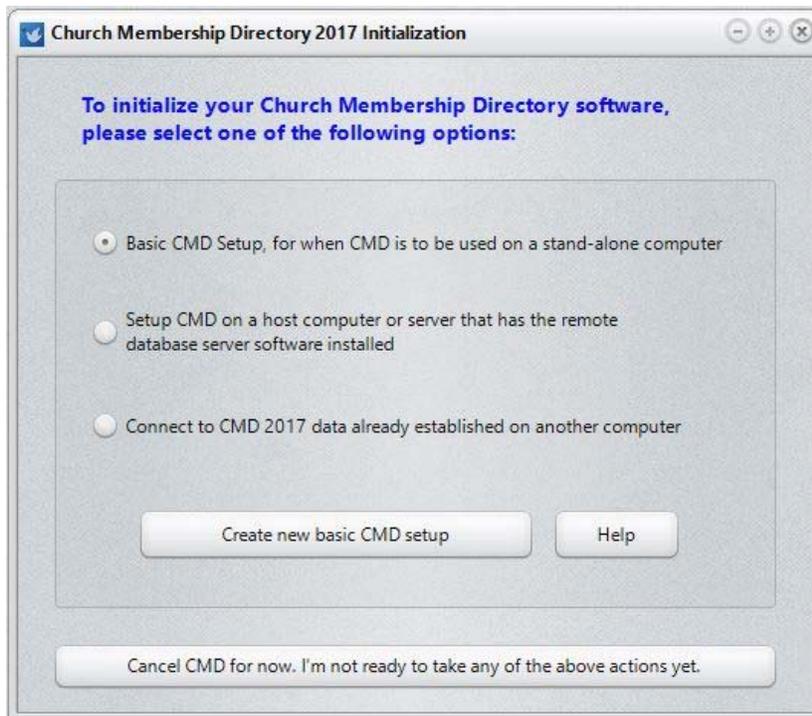
Step 5: Initializing CMD 2017

After clicking Finish on the setup program, you are ready to startup CMD 2017 for the first time. If CMD 2017 doesn't automatically start up when you click the Finish button, find and double-click the CMD 2017 icon on your desktop.

You may also double-click the CMD 2017 FMX icon if you wish. You may use either version for the startup processes. They work exactly the same, though the screens will vary in minor details. We'll use the new FMX version for our screen grabs so that you can see a little of the refreshed look for CMD right from the start.

Whether you have a prior version of CMD already installed or if you are installing CMD 2017.x as the very first version of CMD going on your computer, the first steps you will take are exactly the same. Either way, CMD 2017 needs to set up its own file space and create the tables that are used in the overall CMD database for 2017.

When you run CMD 2017.x for the first time, you will see this dialog:

You must follow through with the initialization process for CMD 2017 *before* you can enter any new names into CMD 2017 or import data from a prior version. Though there are 3 options for initialization, **you will select the first option**, Basic CMD Setup, and then click the **Create** button on the lower part of the dialog.

Basic CMD Setup

Select the first option, "Basic CMD Setup, for when CMD is to be used on a stand-alone computer." You will be creating a "local" CMD file – meaning it's a CMD data file that is meant to be used locally on the same computer on which the software is installed.

That is the *only* appropriate option to select since you cannot network CMD without obtaining the optional remote database server software. Once this selection has been made, click the button that says **Create New Basic CMD Setup**.

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

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

> First Community Church 2017 Data
> Grace Church Data 2017
> Church Family Data 2017

It is best to include the 2017 year in there somewhere since CMD's configuration file can now recognize CMD files from multiple years, and having the year in there will help keep things straight.

The same is true for both the **Database Name** and **Data Folder** fields. We suggest having 2017 in the name or folder to avoid confusion with prior CMD data files, or data files created in future years.

You are free to use the suggested Database Name and Data Folder Name, or you may substitute your own entries in for either or both of these fields if you wish. If you wish to create additional CMD files for CMD 2017 once you've completed the basic initialization process, bear in mind that each new CMD file that you create will need to have unique names for *both* Database Name and Data Folder Name that differs from other Database Names and Data Folders already defined in your CMD's configuration file.

Church Information

While this information can be entered later, I advise you to do it now if it at all possible. Prior church information is not imported, so it needs to be established again.

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

Creating the File

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

Once it's finished, you'll be taken to CMD's home screen where you can either begin entering information or import data from CMD 2012-2016 using the **Import Prior Data** item on CMD's **Utilities Menu**.

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

Phone Apps

There are two phone apps that come free with CMD 2017, along with the web server required to make them work. For a live demonstration of how they work, look here:

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

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

To make the phone apps work, you'll need to do the following in this order:

- Reopen the CMD 2017 Tools program **as an Administrator**, and click on the **Servers** page again.
- Open the combo box below the words **Select Default App** in the box where the **Web Server** stuff is located, and select the app that you wish to have pop up if only the IP address or domain name of the host computer is entered in the phone's browser. You may select **None** as an option if you prefer.
- Click **Reset Web Server INI File**.
- If the Web Server Status shows Not Installed, click the button to **Install Web Server**.

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

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

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

Networking CMD

In order to network CMD, you must use the optional remote database server software, which is available directly from Software for Ministry. Not only does it allow you to connect multiple computers, it also allows you to access CMD's data remotely by a computer running CMD somewhere offsite. If you would like more information about the remote database server, please click http://www.softwareforministry.com/html/remoteaccess.html.

What's New in CMD 2017?

To see a list of the changes in CMD 2017.x, select the Help Contents option on CMD's Help Menu. Scroll to the very bottom and you'll see a chapter there for New Features in CMD 2017.x. Open that chapter and read over the introduction to the new features.

CMD 2017 FMX Notes

The FMX version of CMD for 2017 starts having nearly all of CMD Classic's features. Only a very few remain. There are a couple of things in Church Directory we need to finish, and we have not yet implemented the Places Reservations feature. There are also a couple of pledge statements not yet finished. If you notice something missing yet in FMX, just open Classic and you'll find it there in the meantime.

There are a few features that are only in FMX: the texting features added in 2016, and the ability to define specific bar code numbers for use with attendance in case you are using third-party bar codes such as a key fob.

If You Get Stuck

If you have problems with your basic setup, please do not call me first!

First, please either e-mail me for help at mic@softwareforministry.com or text me at: 817.219.1243.

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

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

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

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