Startup Notes for CMD 2018.x with Remote Database Server Software or Full Suite for <u>new</u> CMD Users

This installation must <u>first</u> be done on the actual computer that will be hosting CMD's data! Do not start this process on a client computer.

The installation process is not hard, but there are specific steps that need to be followed in the correct sequence. Briefly, here are the steps (in order) that you will take:

1. Download the two setup files needed for CMD 2018
2. Run the setup program for CMD 2018
3. Run the setup program for CMD 2018 Tools
4. Open CMD 2018 Tools, click the Servers tab, click BOTH the Reset Web Server INI File and the Reset CMD Server INI File buttons, the install and start both the CMD Server and CMD Web Server
5. Run CMD 2018 for the first time
6. Create your first new Remote CMD File (which initializes CMD 2018)
7. Connect client computers to CMD 2018 data
8. What's New in CMD 2018?
9. CMD 2018 FMX Version Notes

Below is detailed information about each step. Once again, it's important to do these steps in the order they are proscribed.

Step 1. Download the Setup Files

Go to this page on our web site:

www.softwareforministry.com/html/cmd2018downloads.html

You are going to download two files onto the host computer:

- CMD2018ToolsSetup.Exe

- CMD2018.xWithRDBSSetup.Exe (or CMD2018.xFullSuiteSetup.Exe if that's your version)

Most likely, the two files will be placed automatically in your Windows Downloads folder.

Note: Do NOT run the CMD 2018.xSetup.Exe program until told to do so in the flow of these instructions! Please follow the steps in order or you will have problems!

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.

2. Run the CMD 2018 Setup Program

Find and double-click the icon that says CMD2018.xWithRDBSSetup.Exe (or CMD2018.xFullSuiteSetup.Exe if that's your version). As the setup program starts, you'll be prompted to enter the password I have sent you already by e-mail. If you have misplaced the password, please contact me and I will re-send it.

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

The setup program will place two version of CMD 2018 on your computer:

- **Classic**: This is the CMD you've known and have been using updated for 2018. 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 2018, which is the basis for the Mac version of CMD, which we believe will be available sometime during 2018. While the FMX version is not fully built out yet, almost everything is done so you can begin using FMX right away.

Note that as you start to use CMD, 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.

When you come to the Finish dialog, uncheck the box that says to run CMD 2018 on exit. **Do not start CMD 2018 itself at this point!** We have to start the server software first, so you need to finish the setup program without starting up CMD 2018.

3. Run the Setup Program for CMD 2018 Tools

The CMD Tools program is designed to handle the tasks of installing the remote database server software and the web server software, so we need to run that setup program next.

Find and double-click the icon for the CMD 2018 Tools setup program on your host computer's desktop. Click the appropriate buttons to complete the setup of CMD 2018 Tools.

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 2018 Tools program has code in it that starts/stops and installs/uninstalls Windows services. Your anti-virus program doesn't know that CMD Tools is safe because it only accesses those Windows services that are part of CMD, so if it is blocked or removed, you will need to temporarily turn off your anti-virus software and rerun the setup program. In some cases, you may even have to download it again first. This can happen either during setup or when you first try to run it.

4. Install and Start the Remote Database Server Software and the Web Server Software

Startup CMD 2018 Tools, **but you must do it in a specific way**. Instead of double-clicking the CMD 2018 Tools icon, instead, **right-click on it** and select the option from the menu that says **Run as Administrator**. If you don't start this correctly, the Tools program won't work for you.

Once the CMD 2018 Tools program is running, find and click the Servers tab and note there are two boxes on this page, one referring to the CMD Web Server and one to the Remote Database Server (CMD Server).
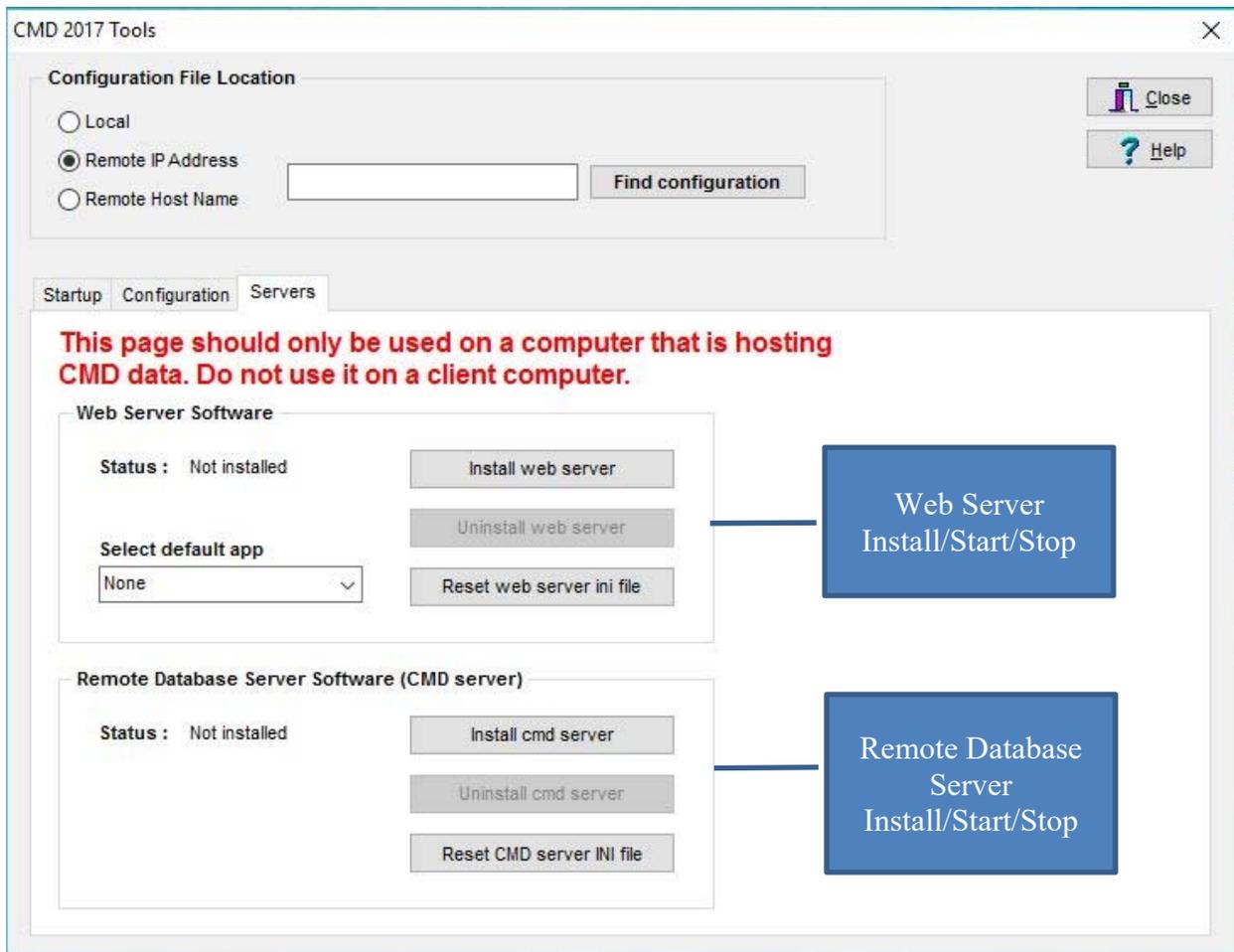
In the screen grab above, there are two group boxes, one to control the Web Server software, and the lower one, to control the Remote Database Server software. Note that in the screen grab above, neither of the servers are installed and running.

First we'll install the web server (this is for the phone apps, and the tablet apps, if you have them). Follow these simple steps:

- Open the drop-down box labeled **Select Default App**. We recommend that you either select cmdstafffphone.html or None. You can change this later if you wish. This designates which app automatically opens on your phone or tablet device if the IP address

or domain name is typed in on your device's browser. Don't worry if you don't follow what this means right now! Here's what the drop-down menu looks like:
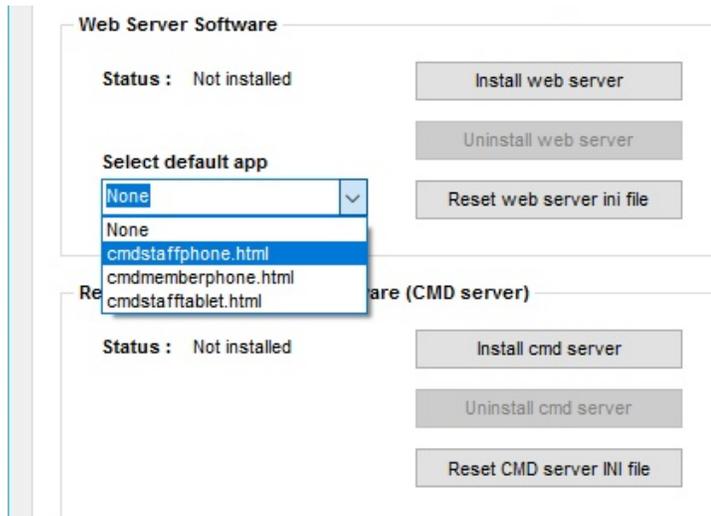
- Next, click the **Reset Web Server INI File** button. An on-screen message will confirm that it has been reset.

- Now click the button that says **Install Web Server**. After a brief moment, the button's label will change to say Start Web Server. That means the web server was successfully installed. Once clicked, the Web Server section will look like this:
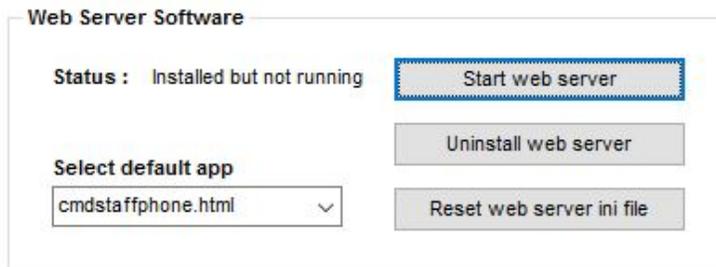
- To finish installing the Web Server software, click the **Start Web Server** button. It takes a few seconds for the web server to start up. Once it does, the Status for the Web Server Software should look this screen grab:
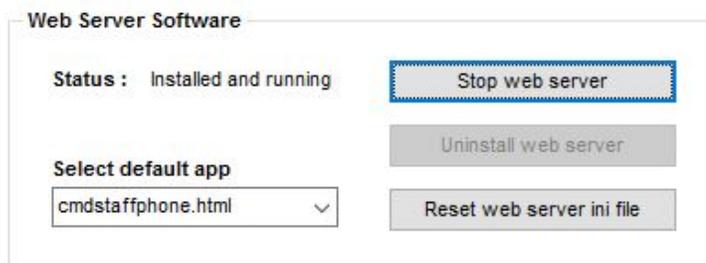
You are now ready to move on to the Remote Database Server Software (CMD Server) setup. We won't add screen grabs for the following because you know how it works from the Web Server setup above. So we'll just outline the steps:

- Click **Reset CMD Server INI File**. It's really important that you do this first! An on-screen message will confirm that it's been rewritten.

- Click the **Install CMD Server** button. A brief moment after you click it, the button's label should change to say Start CMD Server.

- Click the **Start CMD Server** button. As with the web server software, it takes a couple of seconds for this to start up. Once it does, its status line will look like the above screen grab, too.

When you are all finished with both the Web Server and Remote Database Server setup, the Tools program's Server page should look like this:
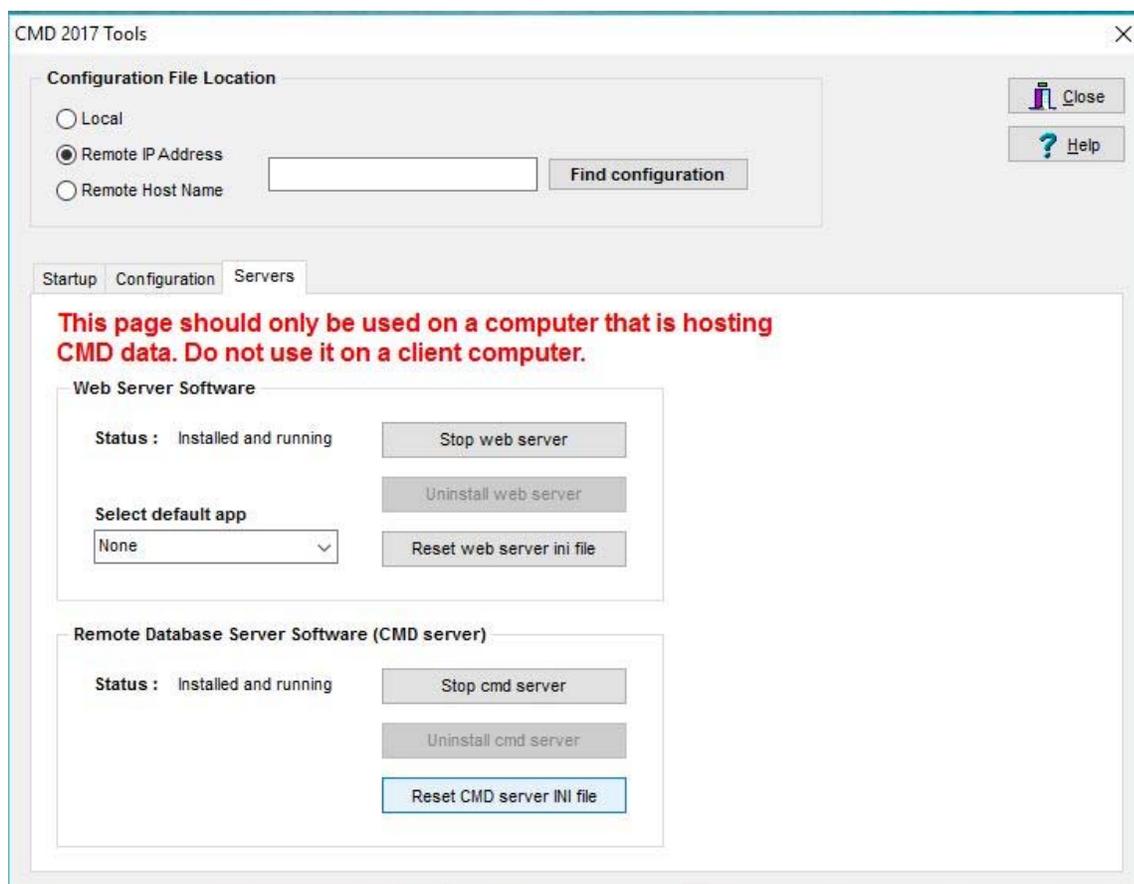
NOTE: The servers will start up automatically should your host computer ever get turned off. They run in the background, and anyone operating the host computer will be totally unaware of their background operation.

5. Run CMD 2018 for the First Time

Find and double-click the CMD 2018 icon on your desktop.

You may also double-click the CMD 2018 FMX icon if you wish. <u>You may use either version for the startup processes</u>. 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.

First, CMD 2018 needs to set up its own file space and create the tables that are used in the overall CMD database for 2018.

When you run CMD 2018.x for the first time, you will see this dialog:
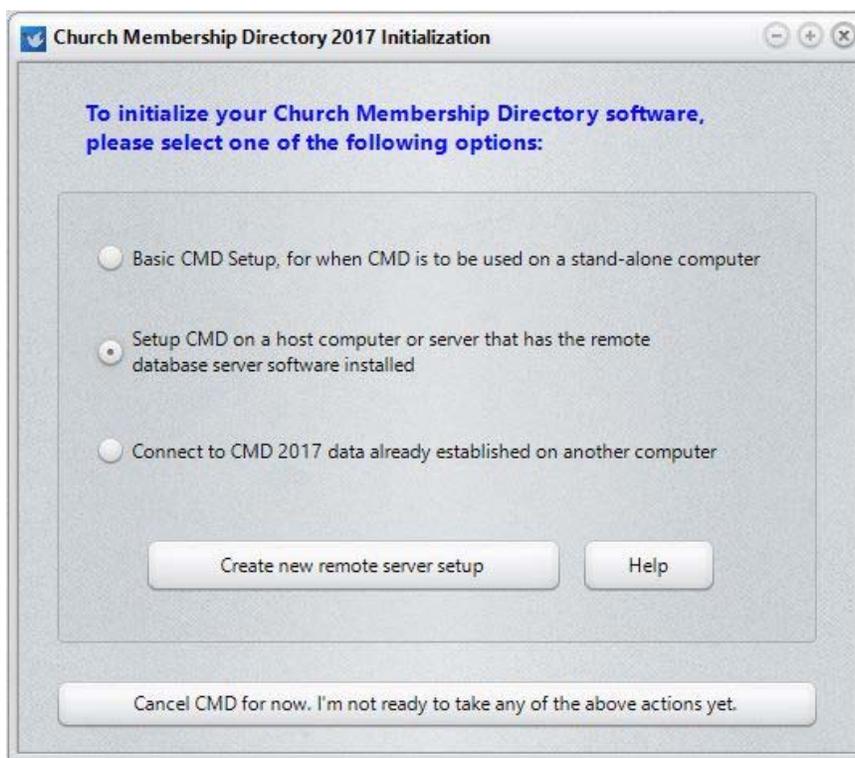
Since you are starting up CMD 2018 for the first time on your <u>host computer</u>, you will **select the middle option above**, the one that says "Setup CMD on a host computer or server that has the remote database server software installed." Click the large button near the bottom that says to "Create New Remote Server Setup."

When you click this button, you'll first see a warning prompt to make sure that you have the Remote Database Server software running:
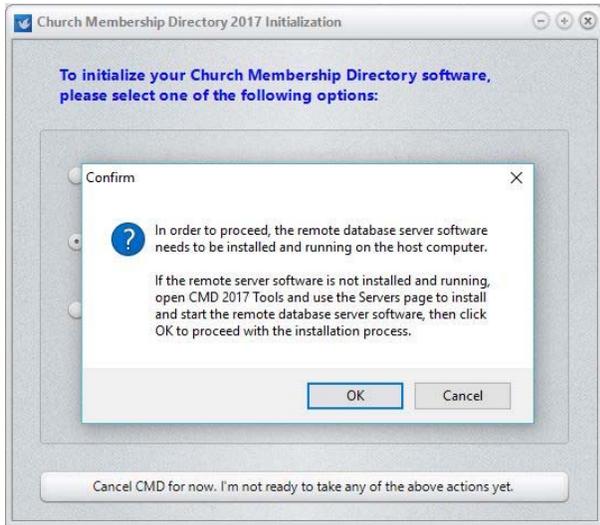
After first confirming that the Remote Database Server is running, you will be taken to the Create New Remote CMD File dialog:
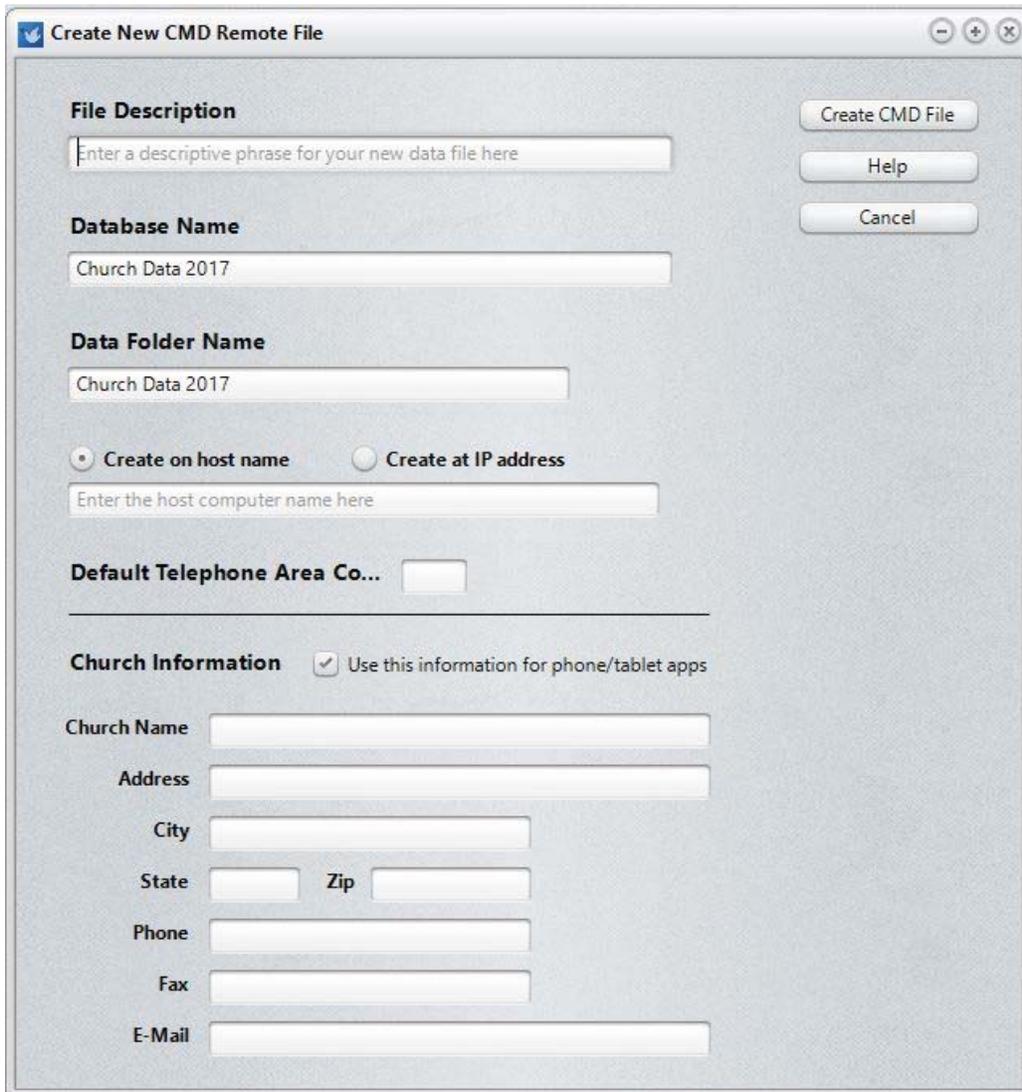
6. Create New CMD 2018 File

First, enter a **File Description** for the new remote file you are creating. Use a description that will easily help you identify the data file while CMD is running. This is especially important if you intend to use multiple CMD data files. Here are some useful examples:

> First Community Church 2018 Data
> Grace Church Data 2018
> Church Family Data 2018

Use the 2018 date somewhere in your description since CMD's configuration file can 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 2018 in there to avoid confusion with older CMD data files, or data files created in future years.

You are free to use the suggested Database Name and Data Folder Name if you wish. However, if you wish to create additional CMD files for CMD 2018, you will need to rename both of these for any additional CMD files – it's mandatory to use unique Database Name and Data Folder Names for each CMD file you create.

Since this is your first time ever using CMD, we suggest you enter your church's area code in the **Default Telephone Area Code** field.

Create on Host Name

When creating a remote file, CMD's data engine will need to know if it is to be created using a Host Name or an IP address.

If you are creating the file on the host computer (and that's where you should be creating it!), we strongly suggest that you use the Host Name for this. In this context, this actually means the Computer Name of the host computer.

If you do not know the name of the host computer, click in the Search box near the lower left corner of the Windows screen and type in Computer Name. It should take you to a screen that displays the computer name. Enter the name of the Host Computer in the space provided on the **Create Remote File** dialog.

Create at IP Address

Though we provide this as an option, it is meant to be used when a new CMD file is created from a client computer that uses an IP address to connect to CMD's data. Use the Host Name when you are creating your first CMD file for CMD 2018.x while at the host computer.

Church Information

While this information can be entered later, I advise you to do it now if it at all possible. 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 New File

Once all the fields have been filled in, click the **OK** button to begin the process of creating CMD's data tables for the CMD file you are creating. Once it's finished, you'll be taken to the CMD's main dialog where you can begin entering new names, or import data from a prior version of CMD.

In most instances, the file creation process proceeds without any problems. However, some Windows installations (mostly based on anti-virus/firewall stuff) may throw a roadblock at you. If CMD doesn't correctly complete it's install process at this point, contact me and I will give you some things to do to work around it.

7. Connect Client Computers

Connecting client computers is simple once you have the remote database server software running (CMD Server). Follow these steps:

1) Ascertain the IP address or domain name of the host computer. You'll need the internal local-network IP address if the client is on the same local network as your host computer. However, if you are connecting from a computer off-site, you'll need the domain name or static IP address that can be used from the outside.

2) Download the CMD 2018 setup program onto your client computer.

3) Run the CMD 2018 setup program

4) Double-click the icon for CMD 2018 to start it up for the first time. Select the third option on the Initialization dialog, to Connect to CMD 2018 Data Already Established on Another Computer, then click the **Connect to Existing Data** button.

This will bring up this dialog:
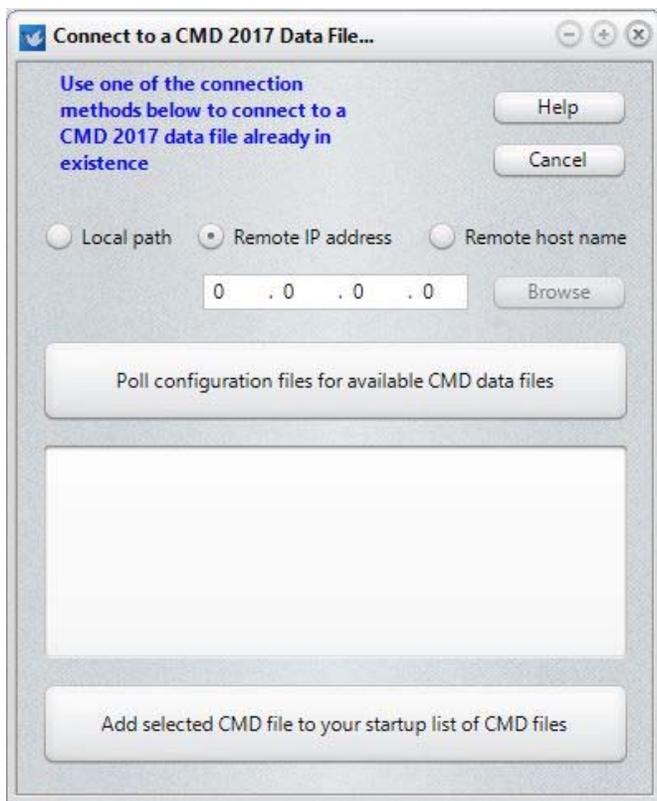
Enter the IP address, or click Remote Host Name if you are going to enter a domain name. Once you've entered either the IP address or Remote Host Name, click the **Poll** button to see the data files available.

When there's an available 2018 file to connect to, it will be listed in the large list box area. Check the box of any of the files you wish to connect to, then click the **Add** button near the bottom of the dialog.

This will connect the client computer to the remote computer hosting the CMD's data.

8. What's New in CMD 2018?

To see a list of the changes in CMD 2018.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 2018.x. Open that chapter and read over the introduction to the new features.

9. CMD 2018 FMX Notes

The FMX version of CMD for 2018 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: 818.219.1243.
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.