

Automatic Backups & CDM+

Automated backup systems have been used in office environments for years. No doubt many of you already use some form of automatic backup to protect your valuable documents and other data. These programs back up data to a server or other type of external hard drive (maybe even to a site on the Internet) on a preset schedule. They are very convenient and provide office staff with the confidence and security that important information can be recovered in the wake of a computer problem.

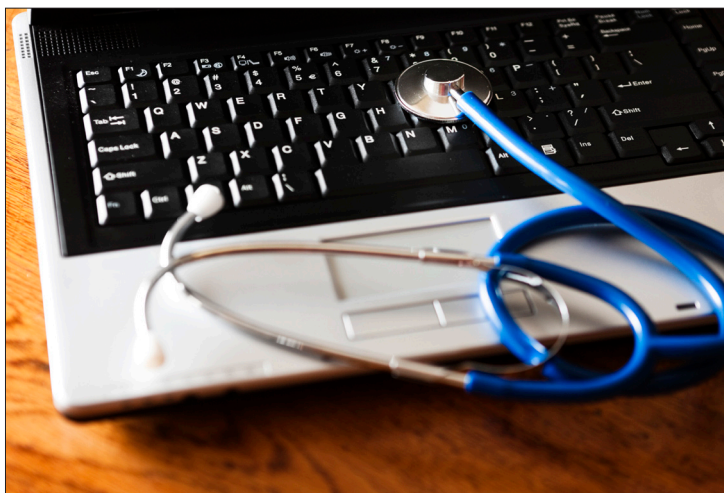
Years ago, in CDM+ versions prior to 8.1, you could use one of these automated systems to back up the CDM+ datafile. However, with the introduction of CDM+ 8.1 we changed the CDM+ structure from a datafile to a SQL database server, which meant you could no longer back up CDM+ data with a third-party automated system. A CDM+ 8.1 database could be backed up manually and saved anywhere, but it required that the user remember to regularly create a backup.

But things change! Did you know that CDM+ 8.1.2 now gives you the convenience of automatic backups from within CDM+ itself?

No more remembering to start the CDM+ backup just before you leave for the day!

The Automatic Backup feature in CDM+ 8.1.2 makes a copy of your database(s) and saves a compressed copy to a location you choose. If you already have a separate automated backup system, you can set the CDM+ Automatic Backup to save your files in a location so that the automated backup system will save those files just like it saves the rest of the files on your computer. You also have the ability in CDM+ 8.1.2 to back up your data to an external hard drive or even upload it to a site on the Internet using FTP (file transfer protocol) using the CDM+ Automatic Backup feature. An off-site backup not only protects your data in case of hard drive failure, but also means important information is not lost in case of a fire, flood or theft of the church's computer equipment.

The setup and use of the Automatic Backup feature in CDM+ 8.1.2 is very easy. We have developed tutorial documents for both our Macintosh and Windows users that will assist you in setting up the CDM+ Automatic Backup feature. **You can get these documents here: [Windows](#) or [Macintosh](#)**



If disaster struck your church's computers, would your data be secure? Could the work of the church office continue uninterrupted? With Automatic Backups, the answer to both questions is a confident "Yes!"

Have you made YOUR Users Conference plans yet?

2009

Annual Users Conference

**October 26-28, 2009
Seelbach Hilton, Louisville, KY**

Get more information or register online now!

Reserve a Hilton room

Just **\$119/night** for a four-diamond hotel! Treat yourself or celebrate in style and come early or stay late. Conference rate is good 3 days before and 3 days after the conference.

Questions?
Prefer to register by phone?
Call 800-633-9581
during normal tech support hours.

UPCOMING GROUP ONLINE CLASSES

Wed., September 9

- Fundamentals of CDM+
- CDM+ Membership Overview
- CDM+ Roommate Overview
- CDM+ Payroll 1

Thurs., September 10

- CDM+ Contributions Overview
- CDM+ Membership 2
- **Getting Started in CDM+ Accounting**
- CDM+ Payroll 2

Thurs., September 11

- **CDM+ Accounts Payable**
- CDM+ Check-In/Check-Out Overview
- **CDM+ Accounting Ledger 1**
- Fundamentals of CDM+

Wed., September 23

- CDM+ Accounting Overview
- CDM+ Membership Overview
- CDM+ Contributions 1
- CDM+ Contributions 2

Thurs., September 24

- **CDM+ Accounting Ledger 2**
- **CDM+ Accounting Reports 2**
- CDM+ Pastoral/Visitation Records
- Fundamentals of CDM+

To view, visit: cdmplus.com/Training/GroupOnline

Need a good foundation in CDM+ Accounting? Consider taking a series of classes like those highlighted above.

Q
&
A



STEVE HANSEN

Question:

Sometimes I want to “pretty up” a report before I send it to a committee or I want to sort information in an order that isn’t available in CDM+. How can I move information from CDM+ into Microsoft Excel (or Microsoft Word)?

Answer:

It’s easy. Select the report you want and configure it as you wish. Then click the **Print** button. Instead of selecting the printer, however, select **Print to Screen**. The report will generate and appear in a new window. From this screen display, select the **Clipboard** tool from the toolbar at the top. Open Excel and either create a new spreadsheet or open an existing one. Select the cell in your spreadsheet where you want to insert the CDM+ information. Select the **Edit Menu** from the menu bar, and then select **Paste** to drop the CDM+ information into your spreadsheet.

Now you can use any of Excel’s functions to change the appearance, change the ‘sort,’ or perform additional calculations.

NOTE: The report destination window also provides a **Clipboard** destination. We recommend that you print to the screen and then direct the screen output to the clipboard instead of printing directly to the **Clipboard**.

Get a how-to PDF with screenshots. 

CDM+ Users Poll

Does your church have a dedicated server computer?

[Click here to enter poll](#)

Poll question results will appear in the next issue of *The CDM+ Connection*.

Results from last poll:

Does your church track its membership by geographical location?

Yes: 11% No: 89%

If so, does it use CDM+ for the tracking?

Yes: 12.5% No: 87.5%

When multiple people use CDM+, you create a user account for each person. This not only gives everyone their own window positions, preferences and other settings, but also lets the CDM+ administrator control what each person can and cannot do in the program. If you have many users in the program, you can save significant time when configuring these permissions by using **Access Settings**.



TIME-SAVER TIP
Access Settings in User Management

set their permissions. This allows you to rapidly create several user accounts with the same permissions.

Access settings go one step further by allowing you to quickly adjust permissions for existing users. When you change an access setting and there are users using that setting, CDM+ will ask if you want to apply the changes to those users. If you select an access setting for an existing user, CDM+ will ask if you want to set that user’s permissions to match those of the access setting. However, if you delete an access setting, users using that setting will not be deleted, nor will their permissions change. For more information on **Access Settings**, see the User Management section of the Administrative Tools manual.

An access setting has options for controlling what a person can do in the program, just like a user does. You can create a setting for membership information lookup, or contributions data entry, for example. Highlight a user on the **User Management** window and click on an access setting to automatically

ON A PERSONAL NOTE



Meet Kris Erickson

Technical Manager, First Church of the Nazarene, Centralia, WA

Average church attendance: Approximately 300

Number of persons in office using CDM+: CDM+ is loaded on 8 computers, but 5 different people are using CDM+ consistently.

Kris Erickson appreciates the dedication of the CDM+ staff.

CDM+ programs used by the church: The Pro versions of Membership, Contributions and Accounting, plus Event Registration and Enhanced Notices.

Mac or Windows: We have an unusual situation in that all of our office computers run Windows but our database is on a Linux server. For that reason I would almost call us a cross-platform office.

How long have you used CDM+? I have used CDM+ since I began doing data entry here as a volunteer almost 6 years ago. Now I’m the person who trains the rest of the staff in CDM+.

What do you find most helpful about CDM+? The whole process of data entry is fast, even with the use of many volunteers, because everything is linked in a relational database. I find that invaluable.

The number one thing I like about CDM+, though, is the great support of the staff. Tech support has always gone above and beyond to solve any problem I have encountered. I needed some extra help to set up our network with the Linux server, and everyone worked together to help me get that done. I have not found that kind of responsive support from any other software company.