Archiving

This archiving section is divided into three parts. Parts 1 and 3 are the same for all archiving. Part 2 indicates what to do for the various records you wish to archive. Do step 1, choose one of the options under step 2, and then do step 3.

STEP 1

1- Start the **CDM Plus** program in the normal manner.

2- Under **File**, select **Archive Utility.**

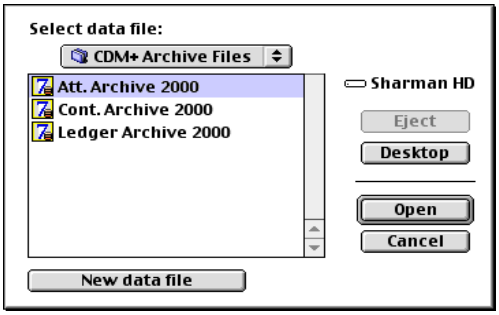
3- The CDM Plus Archive **Instructions** appear on the screen. Read the instructions.

4- Press **Return/Enter** or click **OK.** The Select data file dialog box appears.

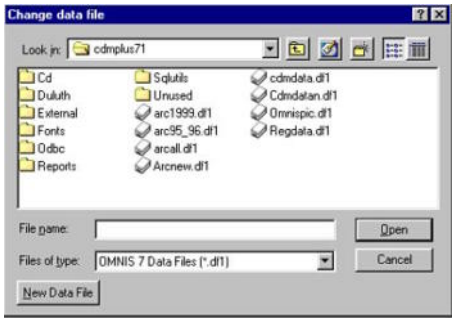
5- If the Archive Data file you wish to use is listed, select it by double-clicking on its name. If you need to create a new Archive Data file, click the **New data file** button.

6- After clicking the **New data file** button, a dialog box appears which allows you to name the data file and indicate where you want it located. Name the data file, and indicate where you want it located on the hard drive.

NOTE 9.1: The word **Archive** must be included in the name (e.g.—Cont Archive 2000). For Windows users add the .df1 extension at the end of the archive name. The archive data file should be in the same location as the CDM Plus Data file (Macintosh) cdmdata.df1 (Windows). After the archive is complete the archive file can be moved to any other location.



Macintosh Dialog Box



Windows Dialog Box

7- Press **Return/Enter** or click **OK.**

8- The Church Data Master Plus **Data Archive Utility** window appears indicating the data file selected and its location. **CDM Plus Archive** also appears on the menu bar.

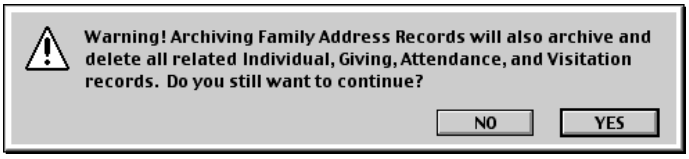
STEP 2

Choose one of the following options and then move on to step 3.

OPTION 1 - Archiving Family Address Records

1- Under **CDM+ Archive** on the menu bar, select **Membership**.

2- Under **Membership Export**, select **Family Address Record**.



3- The following warning message appears:

4- Press **Return/Enter** or click **YES.**

5- The **Select Mailing Codes to be Exported** window appears. Enter the mailing codes to be exported.

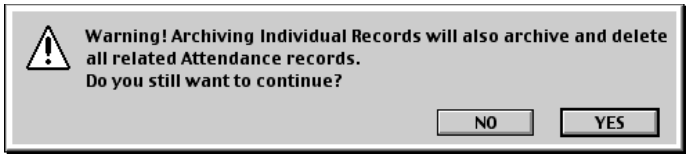
6- Press **Return/Enter** or click **OK.**

7- Now move to **#1** in **Step 3**.

OPTION 2 - Archiving Individual Records

1- Under **CDM+ Archive** on the menu bar, select **Membership**.

2- Under **Membership Export**, select **Individual Records**.



3- The following warning message appears:

4- Press **Return/Enter** or click **YES.**

5- The **Select Status Codes to be Exported** window appears. Enter the membership status codes to be exported.

6- Press **Return/Enter** or click **OK.**

7- Now move to **#1** in **Step 3**.

OPTION 3 - Archiving Attendance Records

1- Under **CDM+ Archive** on the menu bar, select **Attendance**.

2- Under **Attendance Records Export**, select **Membership Attendance**.

3- The **Set Export Criteria** window appears. Enter the **Attendance Date Range** to be exported.

4- Press **Return/Enter** or click **OK.**

5- Now move to **#1** in **Step 3**.

OPTION 4 - Archiving Contribution Records

NOTE 9.2: Be sure to run the **Update History** routine under **Contributions** before archiving contribution records.

1- Under **CDM+ Archive** on the menu bar, select **Contributions**.

2- Under **Contributions Export**, select **Contributions**.

3- The **Please enter beginning and ending offering dates** window appears. Enter the date range for which you want contribution records exported. Also enter the Giver's Code range if you want to archive only selected givers—leave blank to archive all givers.

NOTE 9.3: If you have not run the update history function in Contributions, CDM Plus will ask if you want the update history routine run before archiving information.

4- Press **Return/Enter** or click **OK.**

5- Now move to **#1** in **Step 3**.

OPTION 5 - Archiving Ledger Entries

NOTE 9.4: Be sure the previous year has been closed and all checks from the previous year have cleared the bank before archiving ledger entries.

1- Under **CDM+ Archive** on the menu bar, select **Accounting**.

2- Under **Accounting**, select **Ledger**.

3- Under **Ledger Export**, select **Ledger Entries**.

4- The **Set Export Criteria** window appears. Enter the date range for which you want ledger entries exported.

5- Press **Return/Enter** or click **OK.**

6- Now move to **#1** in **Step 3**.

Step 3

1- The Archiving process will begin and continue to completion displaying various messages:

Exporting records messages will appear indicating records are being copied and exported out of the main data file

Importing records messages will appear indicating records are being imported into the Archive data file. (Records are not deleted from main data file until they are safely imported into the Archive data file)

Deleting records messages will appear indicating the archived records are now being deleted from the main data file.

2- The **Archive Complete** message then appears indicating how many records were archived.

3- Press **Return/Enter** or click **OK.**

4- Select another area to archive or, to return to CDM Plus, select **Return to CDM+** from the **File** menu.