

Administering CDM+

CDM+ Structure

- **CDM+ Desktop**
 - Thousands of copies on the planet
 - Developed by Suran Systems, Inc.
 - Easily Replaceable
 - Contains windows, reports, program logic
- **CDM+ Engage and WMT**
 - Web-based access to your data
 - Member's portal
 - Online giving
 - Registrations
- **CDM+ Mobile**
 - Data access from a mobile device
 - Download from the App Store/Google Play/Amazon
- **CDM+ Hosting**
 - Service managed and provided by Suran
 - Hosted in data centers around the US and internationally
 - Manages backups, including separate off-site backups
 - Communicates between CDM+ Desktop, Engage, WMT, Mobile, and your data
 - Also contains certain server-based functions for CDM+
- **Database**
 - Main Database or Archive
 - UNIQUE! Only one on the planet
 - Contains all your information

Maintenance

- **CDM+**
 - Program updates/upgrades
 - Consistent data entry (see Archiving & Data Cleanup Manual)
 - Security

Program Updates

- **Versions**
 - Suite: CDM+
 - Major Version: Major new feature or fundamental upgrade (12.0)
 - Minor Version: Significant number of new features (12.1)
 - Incremental Version: A few new features (12.1.3)
- **Methods**
 - Suran updates your data overnight
 - Web Update in program

- ▶File ▶Update
- Startup Check (▶User Preferences ▶Web Update)
- o Website
 - Can download full program installer
- **Network Update**
 - o Install update
 - o Open updated CDM+
 - o Update CDM+ uploads updated files into database
 - o Out-of-date CDM+ opens
 - o Update files are downloaded to a temporary location
 - o CDM+ prompts for an Administrator's password to update the application
 - o CDM+ is now updated
- **Updating with full installer**
 - o Database is on a newer version that requires a full installer, or your OS requires a full installer to update
 - o Open older CDM+
 - o CDM+ downloads the installer to a temporary location from the Internet
 - o CDM+ quits; the installer is launched
 - o CDM+ is updated

Security

- **Limit access to user access settings and database utilities**
 - o Ensure someone is always accessible by office staff with access to Administration window
- **Start with limited access, add as needed**
- **Develop preset access settings for categories of users** (▶File ▶Administration ▶Users)
 - o Very helpful when creating new users
- **When a user leaves**
 - o Disable their login
 - o Re-assign or delete saved searches
 - o Re-assign or delete saved sets
 - o Review pastoral records, visitation records, and notices

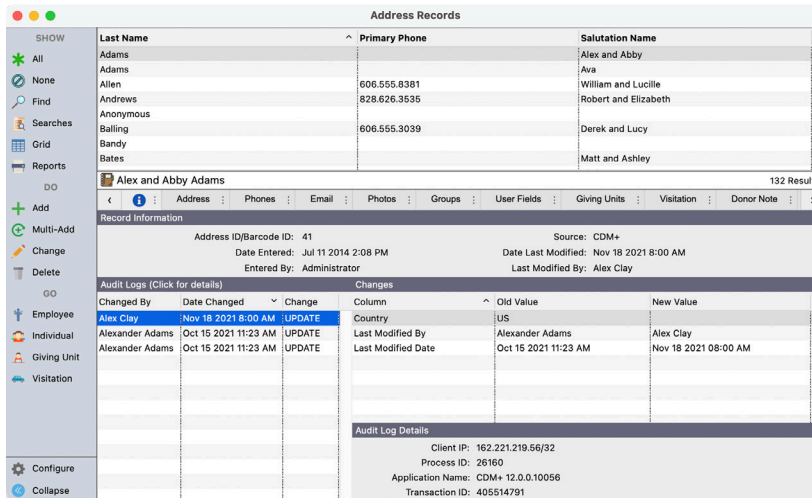
Audit Log

CDM+ tracks nearly every change to every record using a system called the Audit Log. This is an invaluable tool to track down data issues and find out how and when changes occurred.

The audit log tracks complete information, and there is a limited interface in CDM+ Desktop to view these changes. Every record window has an Info tab that shows changes to the primary record. Click a change to see its details.

Only changes to the primary record are displayed here. Changes to connected records, like email addresses or groups, will not be displayed. The audit log tracks these changes, so if you need information on a specific change, contact CDM+ Support and our Data Services team can extract a report of changes

from the backend. You can even request (within reason and not always possible) that Data Services use the audit log to undo changes, including deleting records.



Suran Support Open a ticket directly

Whether you use the Help Center, email, or call, you'll create a ticket in our support queue. The most direct path to our support team is using the Help Center.

1. Click Contact Support in the lower right-hand corner of this page
2. Fill out the form
3. Submit

You'll get an email reply letting you know the ticket was created.

TIP: You can use this form to indicate your need is urgent. This will put your ticket towards the top of the queue.

You can also open a ticket by emailing us at support@cdmplus.com with the following information:

- Your name
- Your organization's name
- Your callback number
- Your availability

Share some details

If you have a screenshot, PDF report, or other example, you can include those in the Contact Support form or your email. The more details you provide, the faster we can help you get a solution.

Skip the line, even if you want a call

We're happy to work with you via phone, email, or both. If you would prefer a phone call, the fastest way to get on our call back queue is to open a ticket and let us know you prefer a callback.

NOTE: Please know we endeavor to respond to requests within 8 business hours, which are 8:30 a.m. to 5:00 p.m. Monday - Friday. If you request help within the last 8 business hours of the day, please let us know the next day and time you will be available as well.

We are always happy to speak with you if you call us at 800-633-9581. When you call, a receptionist will take your information and open a ticket for you. This ticket goes into the same queue that receives emails, so clicking Contact Support or emailing us to request a callback will skip the line to have a receptionist enter a ticket on your behalf.

Our support team will respond as soon as possible, following the order in which tickets were opened, regardless of if the ticket came from an the Help Center, email, or was created by a receptionist.

Schedule calls in advance

If you prefer a phone call and have limited availability or need special personnel present for your call, such as an IT person or CPA, try scheduling a callback. Calls are prioritized based on when they are received, so emailing us on a Tuesday to schedule a callback on a Thursday will prioritize your call ahead of any call requests that come in the day of the callback.

To schedule a callback, simply open a ticket with your name, organization name, phone number, and requested callback time. While we can't guarantee the exact minute we'll call you back, a scheduled call is much more predictable and can often arrive within a 30-minute window.

Leave complete voicemails

If you prefer to have a receptionist create a callback ticket for you but are unable to reach a receptionist, please be sure to include ALL this information in your voicemail:

- Your church or organization's mailing zip code
- Your church or organization's name
- Your church or organization's city
- Your name
- Your callback number
- Your email address
- Your availability
- A brief description of what you need help with

You can always email support@cdmplus.com to request a callback as well.