Complete Installation/Upgrade/Un-install Instructions for CLMS2PC

Description of these instructions and what is contained within.

These instructions cover 3 types of scenarios a complete installation for the 1st time, installing/upgrading to a system that already has an older version of CLMS2PC installed and finally instructions that show you how to completely un-install the application from a machine in the event that you want to start completely from scratch. We also include instructions on how to obtain the most current copy of the setup program.

PLEASE NOTE THAT CLMS2PC NOLONGER WILL SUPPORT WINDOWS XP OR OLDER OPERATING SYSTEMS SO IF YOU ARE RUNNING ON AN XP OR OLDER PLATFORM IT IS HIGHLY RECOMMENDED THAT YOU UPGRADE YOUR SYSTEM TO A MORE CURRENT OPERATING SYSTEM IF POSSILBE OR REPLACE THE COMPUTER YOU WISH TO INSTALL THE APPLICATION ON.

The 1st scenario described will be an upgrade to a system that already has CLMS2PC installed due to the fact that many of the lodges have the application installed and simply wish to upgrade to the most current version. Normally the setup program is not even required to update your CLMS2PC application to the most current version of the program, however due to expiration of the security certificate running the setup is required.

Download the most current version of the setup program.

You will know that you are running an older setup because you will be prevented from running old versions of the setup and prompted with a message below.

| Setup | |
|-------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ? | The version of the setup program you are running is not the latest version. The latest version can be obtained at https://clms2.elks.org/LoadBalancer.aspx?file=Clms2Setup.exe. Would you like to download it now? |
| | Yes No |

To download the setup program, visit the clms2web site

https://www.elks.org/clms2web/default.cfm

Directly above the Lodge Secretary News area you will see a link called CLMS2PC for Windows click this link to get to the downloads page.



On the downloads page you will see the link below you can click on this link to get the new CLMS2PCSetup2016.exe program.

CLMS2PC for Windows Installation/Upgrade Program: https://clms2.elks.org/loadbalancer.aspx?file=CLMS2setup2016.exe

Depending on your browser you should be prompted either Run or Save the program, typically we suggest that you download it to your local desktop so that it will be easy to find. Some browsers may not allow you to change the download location in that situation you will have to located the downloaded program in your downloads folder.

- NAVING INCODER WITH REGULA SEUP ONLY: SQL SERVICE NOT FURNING UP A MANUARY INSTAINING SQL, KNOWIEUUE DASE #310.

| Ēγ | | | | | |
|----|-----------------------------------------------------------------------|-----|--------|--------|---|
| tt | Do you want to run or save CLMS2setup2016.exe (179 MB) from elks.org? | Run | Save 🔻 | Cancel | × |
| | | | | | |

To Run the setup simply double click on the program you just downloaded from whatever location you saved it. The new setup program is called Clms2Setup2016.exe.



If you are not the Administrator of this computer, you may encounter this message, in this situation either you or someone else will have to know the Administrator user name and password. But in most cases you will not see this prompt.

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More commonly you will be presented with a prompt to allow the setup program to run this simply verifies that the setup is a legitimate application and is safe to install. You may click "Yes" to continue.

| 😍 Us | er Accour | nt Control | | | × |
|------|---------------|------------------------------------------------------|--------------------------------------------------------|-------------------------------|-----------------|
| ? | Do you PC? | u want to allow | this app to n | nake change | es to your |
| | 12 | Program name: Verified publisher: File origin: | CLMS2PC Setup B.P.O. Elks of U. Hard drive on th | . S.A. his computer | |
| Sh | iow detail | 5 | | Yes | No |
| | | | Change wi | hen these notifi | ications appear |

AT THIS POINT YOU WANT TO PROCEED TO THE TYPE OF INSTALL YOUR PERFORMING UPGRADE OR COMPLETE INSTALL.

UPGRADE INSTRUCTIONS

1. Accept System requirements the program will not proceed without it.

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| 😽 Setup - CLMS2PC — | \times |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|
| Setup Requirements | |
| Verify that you meet all of the requirements of the application before proceeding. | |
| We have applied all windows updates as documented in the latest install instructions available at http://www.elks.org/SharedElksOrg/ChicagoLMS/files/ CLMS2InstallationInstructions.pdf. | ^ |
| We have checked and applied optional updates as described in the latest install instructions. We have rebooted the PC since installing patches/updates. | |
| We have officially migrated to CLMS2Web. (To verify this login to ✓ http://www.elks.org/dms2web and verify that your records are listed on the Roster Tab.) | |
| We have completed training for use of CLMS2PC & CLMS2WEB, by attending local training provided by CLMS Coordinators and made use of the training videos provided online. | |
| | ~ |
| Next > | Cancel |

2. Make sure you select the **Application Only Option** item in the dropdown. This because you do not wish to overwrite your database since you have already successfully installed an older version of CLMS2PC before.

| 🔂 Setup - CLMS2PC — | | \times |
|--------------------------------------------------------------------------------------------------------------------------------|---------|----------|
| Select Components Which components should be installed? | 67 | R |
| Select the components you want to install; clear the components you do not install. Click Next when you are ready to continue. | want to | |
| Network User (Application only) | ~ | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| < Back Next > | Cancel | |

3. Click Install

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| 🔂 Setup - CLMS2PC | _ | | \times |
|------------------------------------------------------------------------------------------|------------------|-------|----------|
| Ready to Install Setup is now ready to begin installing CLMS2PC on your com | nputer. | | ð |
| Click Install to continue with the installation, or click Back if y change any settings. | vou want to revi | ew or | |
| | | 1 | ^ |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | ~ |
| < | | > | |
| < Back | Install | Ca | ncel |

4. Click "OK" to uninstall old version



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5. Select the Remove option

| CLMS2PC N | laintenance | \times |
|-------------------|------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| CLMS2PC Choose | e the type of maintenance you need. | Provide the second s |
| 2 2 | Restore the application to its previous state. Remove the application from this computer. | |
| | OK Cancel More Infor | mation |

6. Click Finish



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7. Manually Delete Old Shortcut



8. Launch



9. A Progress window will appear



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| CL | MS2PC Windows - Use | r Login |
|----|---------------------|-------------------|
| | Password is | s CASE SENSITIVE |
| | User ID: | rickf@elks.org |
| | Password: | ***** |
| | 🔒 Onlir | ne Authentication |
| | ОК | Cancel |

11. Once grant the service it should start synchronization process

| 👰 Sync Data | _ | | \times |
|-----------------------------|-------------|------------|----------|
| Downloading Database Schema | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| Sync Type | Full Suns | | |
| Preparing Database |) Full Sync | | |
| | | | |
| Data Transfer Progress: | 96.00 |) KB / 871 | 34 KB |
| | | | |
| Cancel | Close | e | |

12. Verify Version your version should be 2.0.0.9 or higher .10, .11 etc. as of the creation of these instructions

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| F G H I J K L M N O P st Lodge Letter: Record Type: [M] Filter: Name Applied, Sammy Bell Jr, Timmy Biship Watter | Q R S T U V W X ["] Status: [A] Name or Number: [] Record Type Member Member | Y Z AI Sort: Name Sort Data: [(le Record Status | ocal)\CLMS2] Paid Thru | |
|---------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| F G H I J K L M N O P st Lodge Letter: Record Type: [M] Filter: Name Applied, Sammy Bell Jr, Timmy Biship Watter | [*] Status: [A] Name or Number: [] Record Type Member Member | Y Z AII Sort: Name Sort Data: [(le Record Status | ocal)\CLMS2] Paid Thru | |
| Name Applied, Sammy Bell Jr, Timmy Biship Walter | Record Type Member Member | Record Status | Paid Thru | |
| Name Applied, Sammy Bell Jr, Timmy Biship Watter | Record Type Member | Record Status | Paid Thru | |
| Name Applied, Sammy Bell Jr, Timmy Biship, Walter | Record Type Member | Record Status | Paid Thru | |
| Applied, Sammy Bell Jr, Timmy Bishin, Walter | Member | | | |
| <u>Bell Jr, Timmy</u> Bishin, Walter | Member | | 4/1/2017 | |
| Rishin Walter | Hombol | | 4/1/2014 | |
| bianip, Walter | Member | | 4/1/2014 | |
| Boone, Daniel D | Member | | 4/1/2016 | |
| <u>Cain, Micheal J</u> | Member | | 4/1/2015 | |
| <u>Calamari Jr, Tom K</u> | Member | | 4/1/2013 | |
| Collins, Jone K | Member | | 4/1/2013 | |
| Connors Sr, Chuck M | Member | | 4/1/2013 | |
| Dash, Bob D | Member | | 4/1/2015 | |
| Davies, Janet | Member | | 4/1/2013 | |
| Davis, Keith J | Member | | 4/1/2013 | |
| <u>Dean, John</u> | Member | | 4/1/2014 | |
| Dipper, Douglas | Member | | 4/1/2013 | |
| <u>Doe Jr, Geral D</u> | Life Member | | 4/1/2013 | |
| Doe, Jane | Member | | 4/1/2013 | |
| Dolbit, Dan | Member | | 4/1/2013 | |
| Bectra, Ken | Hon Life Member | | 4/1/2014 | |
| | | | | |
| | Calamari Jr. Tom K Collins, Jone K Connors Sr. Chuck M Dash, Bob D Davies, Janet Davis, Keith J Dean, John Dipper, Douglas Doe Jr. Geral D Doe, Jane Dolbit, Dan | Calamari Jr, Tom KMemberCollins, Jone KMemberConnors Sr, Chuck MMemberDash, Bob DMemberDavies, JanetMemberDavis, Keith JMemberDipper, DouglasMemberDoe, Jr, Geral DLife MemberDoe, JaneMemberDoibit, DanMember | Calamari Jr, Tom KMemberCollins, Jone KMemberConnors Sr, Chuck MMemberDash, Bob DMemberDavies, JanetMemberDavis, Keith JMemberDean, JohnMemberDipper, DouglasMemberDoe, JaneMemberDoit, TanMemberDean, JohnMemberDipper, DouglasMemberDoe, JaneMemberDoit, TanMemberDoit, TanMemberDoit, TanMemberDoit, TanMemberDoit, TanMemberDoit, TanMemberDoit, TanMemberDoit, TanMember | Calamari Jr, Tom K Member 4/1/2013 Collins, Jone K Member 4/1/2013 Connors Sr, Chuck M Member 4/1/2013 Dash, Bob D Member 4/1/2013 Davies, Janet Member 4/1/2013 Davies, Janet Member 4/1/2013 Davies, Keith J Member 4/1/2013 Dean, John Member 4/1/2013 Doe, J. Geral D Member 4/1/2013 Doe, J. Geral D Life Member 4/1/2013 Doe, Jane Member 4/1/2013 |

COMPLETE INSTALL INSTRUCTIONS

To be posted next week.

UN-INSTALL INSTRUCTIONS

To be posted next week.