CLMS is an online only hosted solution to maintain Membership records for BPO Elks Lodges.

CLMS2WEB can be accessed from anywhere via internet

What does that mean? All data-entry will be performed online via the internet and hosted in a database at HQ in Chicago, Illinois. Semi-Annual membership reports will be filed via CLMS2 and interim Membership counts of each Lodge will be posted to the "GL Backup Reports" webpage on the 1st and 15th of each month so the info is available to the DDGERs, coordinators and PGERS. While the data-entry aspects of CLMS2 will be online, we chose to provide a free downloadable viewer to capture the Lodge records from the website while online and have them available offline if needed for printing and lookups.
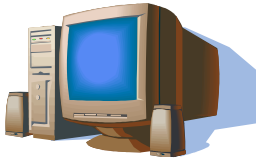
CLMS2PC must be installed locally on Lodge PC to print cards & labels

We provide a program and database that Lodges will install locally on their PC to download and keep in sync the data needed to print dues statements, membership cards, labels, emails, envelopes, mail-merge and various reports pertaining to membership and dues collection. The local database will be synchronized with the HQ via the internet so high speed internet access is highly recommended for most Lodges, smaller Lodges with fewer than 75 members may be able to get by with dial-up access, but dialup is not advisable even for the smaller Lodges.

High Speed internet is necessary

Smaller Lodges can likely perform the data-entry on a dial-up connection but downloading and installing the CLMS2PC print program and performing the data synchronization is impractical and very slow, prone to disconnects and lot's of frustration.

Long awaited multi-user access will be supported in CLMS2 so that several users can be working in CLMS online or printing locally at the same time.

More about CLMS2PC

CLMS2 can be used as a contacts database and to print at the Lodge.

The program has been developed in C# and uses Microsoft SQL Server Express Edition provided free of charge. The print program will require an internet connection to check for changes in the online database. If changes are detected on the server, they will be downloaded for printing and export purposes.

The local database is secured with encrypted passwords and will not be accessible via MS Access or other database tools (secured SQL access requires that you know the appropriate username and password), but you have the option to export any data that you wish from within the application. Note that the exported files are not secured by CLMS2, so due care must be exercised in storage of the exported records. Your data is safe when downloaded by CLMS2PC to your local PC as long as you safeguard the login and password information, remember that anyone knowing this info can theoretically gain access from the PC you installed on or any PC they choose to install the software on, so be careful about guarding the login & password.

The CLMS2 print program has an advanced query builder and report designer that can be used to develop your own reports and even share them out to other Lodges if you choose, so dependency on external tools like FoxPro or Microsoft Access should not be necessary.

Once your data is downloaded from HQ, you will have the ability to disconnect from the internet and work with your data offline.

This may be an option for Lodges that use laptops, but do not have immediate access to internet in the Secretary's Office. Keep in mind that the laptop would have to be moved to an internet accessible zone to perform the data-entry while online and to synchronize the data with the local database for printing. The laptop can be connected from the internet and synchronized data used for reporting until online changes require additional synchronization.

You will not however be able to make changes in CLMSPC. To make changes to your data you will need to use the web browser to connect online via the internet to CLMS2WEB at the elks.org website.

What are the computer requirements?

CLMS2WEB

Generally speaking, CLMS2WEB can be accessed from any internet connected computer running Windows, Apple, Linux, etc., as long as you have internet access and an updated web-browser. Current versions of Internet Explorer should work as well as Google Chrome, Apple Safari and Firefox. Even though it is not mentioned, Norton Internet Security or comparable security package with a subscription to get updates is highly recommended.

A printer may be useful to print screen prints of your transactions may be useful. Access to email may also be useful.

Dial-up internet access may be adequate for smaller Lodges, but it is recommended that high-speed internet be used for CLMS2WEB & CLMS2PC.

The screen resolution should be a minimum of 1024 x 768, 1280 x 1024 is better.

CLMS2PC

CLMS2PC is a bit more complicated.

Minimum requirements (Note these include Microsoft minimum requirements and will not provide best performance, see notes on next page for our recommendations):

> OS .Net 3.5 Service Pack 1, Windows XP (sp3 or later), 2003, 2008 Vista or Windows7
> CPU 400MHZ for the program, add 1GHZ for Microsoft SQL Server Express
> RAM 96MB for the program, 512 MB for Microsoft SQL Server Express
> DISK 200MB for the program, 500MB for Microsoft .NET & 2.2GB for Microsoft SQL Server Express and 600MB plus for the CLMS2 database
> The screen resolution should be a minimum of 1024 x 768
>
> *These are the bare minimum requirements are may not be best suited for your Lodge individual requirements. It may be sufficient for the very smallest Lodge with simple requirements. The next page discusses various installation options and PC recommendations.*

The 1st and most basic requirement is that the program and database be installed on recent Windows OS, either 32 or 64 bit should work fine. The speed of the computer, amount of RAM and Disk will be covered in more detail. Windows 2003, 2008, XP (service pack 3 or later), Vista and Windows7 should all work fine. As time passed, we reserve the right to discontinue support for older systems such as Windows 2003 and XP.

You will want to insure that all of your printing gear is installed properly and with the latest print drivers from the manufacturers suited to the operating system you are running. If the printer is on the older side, it may be time to consider replacing it since paying for professional help to get some of these dinosaurs running often exceeds their replacement cost.

Factors that will affect performance are the number or records in the database (often predicated on number of members in the Lodge), placement of the database, internet speed, historic data being preserved by the Lodge, etc.

The hardware itself will impact performance. The age, relative processing speed, available RAM memory and disk drive capacity will also determine how fast or slow we go.

Most Lodges will use CLMS2PC in Local User mode where the program and the database reside on the same machine.

Larger Lodges that utilize a local network and/or require several people to have access to printing, may install CLMS2PC in Local user mode on a more substantial PC and then locally connected Windows PCs would install CLMS2PC in Network user mode so that it connects to the more substantial PC where the local database resides. Note that this setup does require implementation of a local area network and does up the ante in terms of technology, support, expense, etc. Even the largest Lodges should be able to function with one printing station but we have this option available in case there is a legitimate reason to have more than 1.

So what size computer do we need?

The complete CLMS2PC Local User mode installation needs room and processing power for Microsoft SQL Server Express, Microsoft .Net software, the CLMS2 database and the CLMS2PC program.   SQL Server can be installed on a Server in larger Lodges, separate from the CLMS2PC client software. In this configuration, the CLMS2PC client software would always need to connect to the server via the Lodge network.
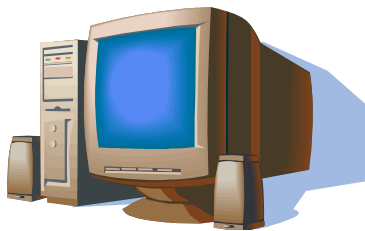
 Lodges choosing to run the stand-alone SQL Server and CLMS2PC client option.
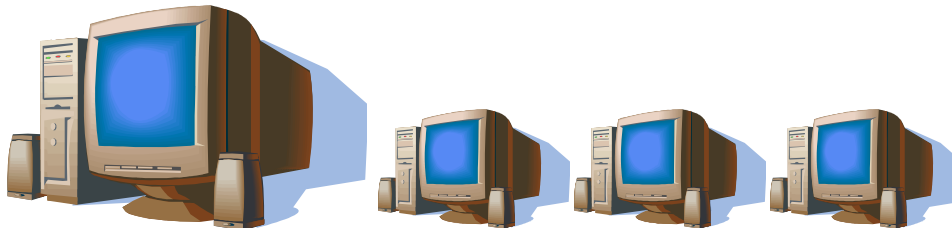
Use installation option: Local User (Application and database)

>   CPU 2 – 3GHZ single core depending on operating system. (2GHZ dual core is equivalent to 3GHZ single processor)
>   Memory 2 to 4 GB depending on size of lodge and the operating system.
>   Memory is cheap, don't skimp.
>   Disk 3-5GB available for CLMS2PC & SQL Server

A Server and networked clients.

Larger lodges dedicating a server may use the smaller sized PCs or laptops networked to the Larger PC that is running the database. These PCs would have CLMS2PC installed in the Network user mode and would not have their independent copies of the database. These client machines cannot operate independent of the server on your network. Additionally, the stand-alone option can be installed to support the laptop that goes home with the Lodge Secretary if needed.

Setting up the networked database and client install – CLMS2PC

Use installation option: Local User (Application and database) for the server.

> CPU 2 – 3GHZ single core depending on operating system. (2GHZ dual core is equivalent to 3GHZ single processor)
> Memory 2 to 4 GB depending on size of lodge and the operating system.
> > Memory is cheap, don't skimp.
> Disk 3-5GB available for CLMS2PC & SQL Server

Setting up the networked client install – CLMS2PC (this will be dependent on the PC Server and cannot operate independently)

Use installation option: Network User (Application only) for the networked clients.

> CPU 1.2 - 2GHZ single core (1.2GHZ dual core is equivalent to 2GHZ single processor)
> Memory 1 - 3GB depending on size of lodge and the operating system.
> > Memory is cheap, don't skimp.
> Disk 1-3GB available for CLMS2PC, no SQL Server installed with this configuration.

Note that if your Lodge has large quantities of Widows, Lodge records, Dignitary, Stray Elks, Associate Member records, etc, or if you have large numbers of inactive historic records or plan to add historic records, you would want to consider your database to be on the larger side rather than going by Active member counts alone.

Software Requirements used to arrive at these recommendations

Recommended

Display   1280x1024 32 bit color

	XP 32bit	Vista 32 bit	Vista 64bit	Win7 32bit	Win7 64bit
GB RAM Memory					
CLMS2PC & SQL Server	2048	3072	4096	3072	4096
CLMS2PC	1024	2048	3072	2048	3072
CPU Ghz					
CLMS2PC only	1.2GHZ	2GHZ	2GHZ	2GHZ	2GHZ
CLMS2PC & SQL Server	2GHZ	3GHZ	3GHZ	3GHZ	3GHZ

dual core 2Ghz or higher is equivalent to 3Ghz single core processor systems

Available Disk before installing CLMS2PC					
CLMS2PC Mb	800	800	800	800	800
DotNet Library	500	500	500	500	500
SQL Server Express	2200	2200	2200	2200	2200
	3.42	**3.42**	**3.42**	**3.42**	**3.42** **Gb Disk +**

Training Resources

Check with your State & District CLMS Coordinators for available training. Call the Coordinators to help you through this process if you have questions. Finally visit the CLMS2WEB website for online training aids and Q&A Webinars at - **http://www.elks.org/clms2web/trainingMaterials.cfm**

Q & A

What happens when Chicago experiences a power outage, technical problem or otherwise? We'll work to resolve the problem as quickly as possible. We have redundant internet connections, redundant hardware, and redundant web servers and soon we'll have mirrored databases, so outages are likely but the likelihood of one lasting days or weeks is minimal. Also unlikely is the loss of your data.

What about security? Our data center is heavily fire-walled by the leading firewall provider, Check Point Software Technologies Ltd. We have specialized techs available 24 hours x 7 days a week to keep the firewalls running and the website is protected by encrypted logins and access. Lodges also now have the option to access the website for enhanced security by selecting the secure server option from the login screen. (Note that logins are *always* processed via secure server.)

What about privacy? We have taken steps to protect the member data by avoiding the storage of red flag data like SSN, mother maiden name, bank account numbers, etc., we do store the DOB because it is needed to calculate the members age and that is part of the business logic needed to run CLMS2. This data is protected by username and password at the Lodge level, and only coordinators, DDGERs, HQ staff and PGERs would have access to the data to assist the Lodges when there are questions. The Lodge Secretary can also grant access to additional persons at the Lodge to assist the Secretary with CLMS2 data-entry and printing, they would have full access. The data downloaded to CLMS2PC will only be kept in the computer for 30 days after which data is erased when the program is accessed and subsequent downloads were unsuccessful in the case of persons that cease to be the Secretary. It's probably a good thing for states that have such privacy laws to restrict use of CLMS2 outside of the Lodge premises to curtail inappropriate access by persons that cease to exist in their roles. Unlike CLMS1, the downloaded data is further protected against file level access by use of Microsoft SQL Server Express which is a network based relational database system, access is granted by CLMS2 only if the users attempting to sign on are listed online or in the encrypted local list as current authorized users. That is basically the way access is being approached for the moment, we'll advise if that changes down the road.

Will we finally be set free from the Active count vs. Ending count discrepancies? This is an intrinsic problem that is not related to software and therefore software is not likely going to solve the problem. The active count pertains to the members that are listed as active in CLMS. The ending count pertains to the beginning Grand Lodge member count plus and minus the changes during the current year. There are many ways that these 2 numbers can go out of sync during the year. Our goal is to make sure the 2 numbers agree! We are trusting that even though the counts will vary due to the nature of some transactions, CLMS1 had some limitations because it was only able to track the last of any dates entered. CLMS2 is much improved in this respect and it is our hope that we should see far fewer out of balance situations as we go forward. When the issue does come up, it is advisable to seek counsel of the Grand Secretary's Office as you are doing now.

Lodge using CLMS2WEB for the very first time after conversion from CLMS1

CLMS2WEB – online data-entry

1.) Access the CLMS2Web site using your regular elks.org user name and password:
http://www.elks.org/clms2web

2.) Once you've signed on, you may be prompted to confirm your lodge committee assignments. For now, please disregard this prompt. Instead, click the tab labeled "Roster" and look at the active member count in the "Lodge Stats" section of the Menu page. Make note of the numbers in CLMS2 and compare to the printed lapsation report we asked you to print from CLMS1

3.) If the Lodge is accessing CLMS2WEB for the first time, go to REPORTS TAB, CLMS Status sub-tab and choose Post Conversion Report. This report will highlight any issues encountered during the process of converting your data from CLMS1 to CLMS2. If there's a discrepancy in your membership count, chances are the problematic records will be listed in this report. In most cases, the problem can be traced to a date that was incorrectly entered in CLMS1. Click the message text to be taken to member(s) in question, and click the "History" to view the system dates associated with that record. Make any required corrections until your CLMS2 membership count matches your membership count in CLMS1. (Please make these corrections in both CLMS1 *and* CLMS2 in the unlikely event that your Lodge will have to be migrated a 2nd time.) Some common problems reported by the PostConversion report (Note that fixing these problems will not necessarily change the report if you run it again. The report is static so that we can determine a later time the issues that existed at the time of migration):
   a. Initiation date > dob, was candidiate 21+
   b. Paid-to date MM-DD should be 10-01 or 04-01 always
   c. Transfer date, reinstatement date, affiliated date issues
   d. Deceased date > than other status dates (transfer, reinstatement, initiated, affiliated, etc)
4.) Maintain paper records of the changes you are making to correct date issues, rate changes so they can be re-applied on subsequent migrations from CLMS1 or make all changes to CLMS1 as you go until you determine that CLMS2 is acceptable to go forward with all Lodge business.
5.) Verify that CLMS2 is set to the correct starting Lodge year.
6.) Verify that the rates used by CLMS2 agree with the rates you were using in CLMS1. Note that CLMS2 now supports Current year dues, Prepaid dues and Delinquent year dues, so this

may require changing sets of rates. Also understand that for members, life and regular member dues utilize separate rate charts.

7.) Verify that the rates used by CLMS2 have the correct general ledger debit and credit account numbers assigned. CLMS2 may have assigned an appropriate number, but be safe and verify with your auditing and accounting rep to see if changes are needed.

8.) Verify that any optional dues used by your Lodge are enabled in CLMS2 and that they also have the correct general ledger debit and credit account numbers assigned.

9.) After acting on the Post Conversion Report issues, verify that your Lodge has a comparable number of active, inactive, widow, Stray Elk, Lodge, Associate Members, Dignitaries, etc. If CLMS1 & CLMS2 counts do not agree, dig deeper by comparing numeric lists from each to identify the records that need your attention and make the necessary corrections.

10.) Review the Committeemen assignments and Officer Assignments. Click the Officers /Committees tab, then "Edit Lodge Officers" change as necessary. Then "Edit Lodge Committees" change as necessary. When all looks as it should be, click the "Submit Committees for Grand Lodge" link.

11.) Verify that your PER, POY, PEY & PDD lists agree in CLMS1 & CLMS2.

12.) Re-enter the Dues statement imprint if you wish to use it in CLMS2, This can be done using copy/paste from CLMS1. Unfortunately we were not able to accomplish this transfer for you so this will remain a manual step.

13.) Resume your CLMS1 data entry if you are going to be parallel process for a while, and duplicate each transaction in CLMS2. Keep a careful eye on your membership counts to make sure they don't fall out of sync. If they do, go to the Reports menu and click the "Current Lodge Year Changes" report:
http://www.elks.org/clms2web/reports/currentYearChanges.cfm

This will list all the members who have been added or dropped from your list during the current lodge year, and should help you isolate the problem.

14.) Continue to submit CLMS1 data backups on your regular schedule if you are parallel processing in CLMS1 & CLMS2 but understand that your CLMS1 offsite backups will be stored at HQ but will no longer affect synchronization with HQ or what you see in CLMS2. Also, the dates in the CLMS Status Report seen by the DDGER and others will no longer reflect CLMS1, rather CLMS2.   The CLMS Backup Reports will likewise derive their numbers from the online CLMS2 data and no longer from the CLMS1 offsite backups. The CLMS Backup Reports records will be auto generated on the 1st and 15th of each month.

15.) Membership and Charity reports will need to be submitted to Grand Lodge from the CLMS2 interface going forward only when the Lodge is on CLMS2.

16.) Submit general questions and comments to the CLMS2Web message board online at:
http://www.elks.org/clms2web/SecyBoard.cfm

(Click the Help tab to find this link on the Main Menu.)

In the event that substantial problems exist with your migration the CLMS Helpdesk will be able to reset your status to CLMS1X so that the CLMS1 offsite backup can be performed again to restart the migration process. Should this be necessary, repeat all the steps above starting with **Going to the new website, step 4.**

CLMS2PC – here is where you go to download the software to install the printing software

Install from web link: http://clms2.elks.org/LoadBalancer.aspx?file=Clms2Setup.exe

Questions of a general nature should be discussed with your CLMS Coordinator and technical issues sent via email to clms@elks.org, it is preferable that you fill out an online ticket at http://www.elks.org/clms2web/help/helpDesk.cfm so that you might hear from us sooner than leaving a message or sending an email. The ticket screen should prompt for all the info we need to speed up the process.   Keep in mind that we do not operate 24x7.