Administrator Manual

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Table of Contents

Sumac Documentation

Sumac is described in three books:

Sumac Users Guide	Use Sumac on a day-to-day basis.
Sumac Administrator Manual	Install Sumac. Set up system-wide lists and options settings that affect all users.
Security and Risk Management	Use Sumac to protect your data.

You should be familiar with the *Users Guide* before reading the *Administrator Manual*.

Install Sumac

Install on a Server Computer for Sumac Gold

Sumac Gold requires a database manager running on a shared server. Any database manager that supports sub-queries and has a JDBC interface can be used. In addition, if the database manager you wish to use does not have a JDBC driver, the standard JDBC-to-ODBC bridge enables you to use any ODBC-enabled database managers, though the bridge imposes a performance penalty.

MySQL is the preferred platform for running Sumac. To install the MySQL server software, follow the steps in *Appendix C – Install MySQL* on page 75.

Ensure regular back ups of the whole database. Current information on backing up your Sumac data can be obtained at:

`http://www.sumac.com/help/backup.htm`.

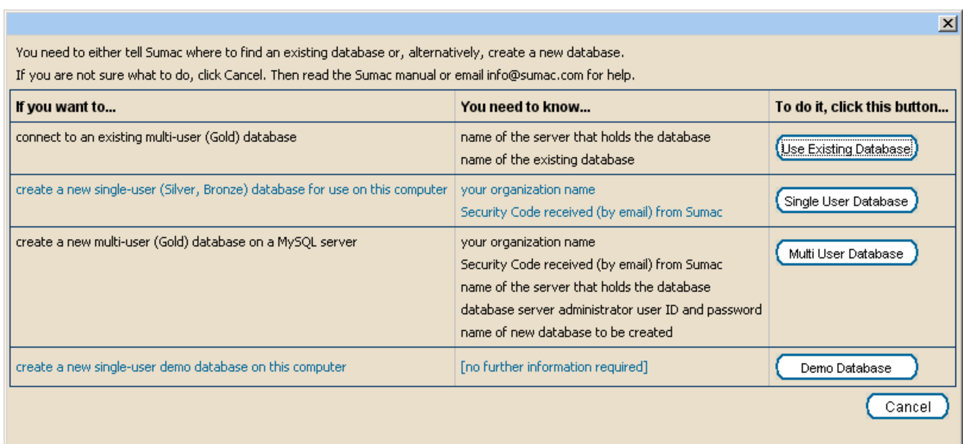
Install on a User Computer

Each computer on which a user runs Sumac is referred to as a user computer. Here are the steps to install Sumac on a user computer:

- ✔ Ensure that Java is installed on the computer. If you go to `http://www.sumac.com/faqs/faqsInstall.htm`, there is information about getting the most recent Java for both Macintosh and Windows computers.
- ✔ User your browser to go to the Sumac website (sumac.com). Click Support and install the most recent version of Sumac. When you click to do the install, your computer may ask if you want to open a file whose name is something like Sumac.jnlp. Click to indicate that you *do* want to open the file. It is a very small file, and contains instructions that tell your computer how to install and update the Sumac program.

Run Sumac For the First Time on a User Computer

The first time Sumac is run on a computer, this window appears:



Click one of the four buttons:

Button	*Use this button if...*	*Notes*
Use Existing Database	Your organization has a Sumac Gold database. You want to use Sumac on your computer, and connect it to that database.	If you do not know the name of the server and database, go to a computer (other than the server) that already has Sumac installed. Run Sumac and choose the Show Configuration command from the Utilities menu. It tells you the name of the server and database. If you are installing Sumac on the server computer, enter *localhost* as the name of the server.
Single User Database	You want to set up a Sumac Bronze or Silver database.	Before doing this, get a security code by sending an email to: `info@sumac.com` The user ID and password for this demo database are *admin* and *admin*.
Multi User Database	You have configured a database server, and want to create an empty multi-user (Gold) Sumac database.	Sumac creates an empty database with a single administrative user. The user ID and password for this demo database are *admin* and *admin*.
Demo Database	You want to create a single-user demo database that allows you to try out all modules of Sumac.	You can only create one demo database per user computer. The user ID and password for this demo database are *admin* and *admin*.

If you do not successfully log on the first time, seek guidance from *Appendix B – Unable to log on* on page 72.

Create New Database From Within Sumac

If Sumac is already configured and running on a user computer, you can still use it to create a new database.

Choose the Use New Database command in the Utilities menu in the Sumac console window. This command presents the same dialog as appears when you run Sumac on a user computer for the first time. See *Run Sumac For the First Time on a User Computer* on page 8.

Setting Up Additional Databases

Sumac can work on multiple databases, each completely independent of the other. If your installation has more than one Sumac database that a user may need to use, you can set up each user's access to the additional database(s) by adding lines to the *databases.txt* file. This file is found in a folder named *SumacSettings* which is in the user's home directory.

Databases.txt contains one line for each database that is accessible to Sumac. If more than one database is identified in Databases.txt, then when a user logs on to Sumac, the user must choose which database to use. There must be no empty lines in the file. Each line contains at least two pieces of information, separated by a single space character. The first piece of information is the database identifier

(JDBC style). The second piece of information is the JDBC driver to be used to access the database. Here is an example of a line in a Databases.txt file.

```
jdbc:mysql://localhost/sumac com.mysql.jdbc.Driver
```

If the server running MySQL is not the same computer as the one running Sumac, then alter "localhost" to the name of the server (on Windows, you can find the server name by right clicking My Computer on the server's desktop, choosing the Properties command, clicking the Computer Name tab, and looking for the *Full computer name*). If there is more than one Sumac database, or if the database is not named "sumac", then alter "sumac" to the name of the database (the name of the folder in the MySQL data folder).

If your database server uses non-standard user accounts, you can append two additional fields, also separated by spaces, to each line in the databases.txt file: the database connection user ID, and the database connection password. In this case, the line may look like this (where dbUID is the database user ID and dbPwd is the database password):

```
jdbc:mysql://localhost/sumac com.mysql.jdbc.Driver dbUID dbPwd
```

Configure Users

The first time you use a Sumac installation, you should choose the Users command in the Administrator drop-down menu. Double click the entry for the admin user and change its password to a password you will remember.

Add entries for other users of the system. See *Users* on page 56.

Other Set-up Operations

Perform other set up operations, particularly adding and removing from lookup lists, and specifying preferences.

Sumac Administrator

Administrator Role

Once Sumac is installed, here are the other roles for a Sumac administrator:

- Define the capabilities of each user of Sumac.
- Create lookup lists, which standardize and speed up data entry.
- Create document templates to support the automatic creation of receipts, thank-you letters, solicitations, and other documents.
- Ensure that the Sumac data is backed up on a regular basis.
- Perform other administrative functions.

Each of these topics is discussed below.

Accessing Administrator Functions

When you log on to Sumac as an administrator user, the Sumac Console has an Administrator menu in the bottom row. This menu contains the additional commands that a Sumac administrator needs to configure and control how Sumac works. This menu has the following commands:

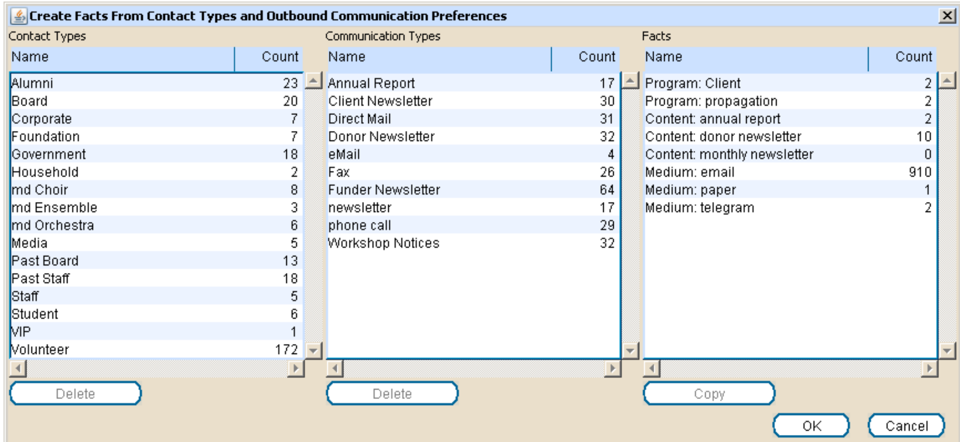
Command	*Purpose*
Change License	Change the options, limitations, and expiry date of a Sumac installation.
Clear All Locks	Unlock records that remained locked because of system crashes.
Lookup Lists	Manage lists of lookup values which appear in drop-down menus throughout Sumac.
Offices	Specify your organization's office(s), and the connection information needed to send email from Sumac.
Preferences	Specify globally applicable options for your Sumac installation.
Re-organize Types	Create facts from contact types and communication types. See Re-Organize Types on page 11.
Users	Specify user IDs, passwords, and capabilities.

Re-Organize Types

In early versions of Sumac, there were no Facts records associated with CONTACT records. This led to using CONTACT types and Desired Outbound Communications for things that are now better served by being Facts.

This Re-organize Types command enables you to re-configure CONTACT types and COMMUNICATION preferences, turning them into facts, and then deleting the old CONTACT and COMMUNICATION type preference information.

The Re-organize Types command presents this dialog:



There are three lists showing in the window:

- The list of CONTACT types, and how many CONTACTS there are of each type.
- The list of outbound COMMUNICATION types, and how many CONTACTS receive each COMMUNICATION type.
- The list of program, content, and medium facts, and how many CONTACTS have each type of fact.

If you want to turn a CONTACT type or COMMUNICATION type into a fact, here are the steps to follow:

- ✔ Click to select the line showing the CONTACT or COMMUNICATION type.
- ✔ Click to select the line showing the type of fact into which the CONTACT or COMMUNICATION type is to be converted.
- ✔ Click the Copy button. This causes Sumac to add a fact of the specified type to each CONTACT who has the selected CONTACT or COMMUNICATION type.
- ✔ Once Sumac has created all the facts, click the Delete button under the CONTACT or COMMUNICATION type to cause the CONTACT or COMMUNICATION type information to be deleted.
- ✔ Later, use the Lookup List command in the Administrator menu to remove the now-unused CONTACT or COMMUNICATION type.

Media Preferences

If some of the Desired Outbound Communications in your CONTACT records are actually media preferences (e.g. email, fax, paper, phone), then you may want to change these into Preferred Medium facts. This cleans up the list of Desired Outbound Communications, and also provides more specific information about the actual preference (i.e. that it *is* a medium preference).

Release 2.4 of Sumac makes working with medium preference facts much easier:

- It adds specific support for medium preferences in the CONTACTS list (a new search type).
- Search builder supports a new Communication Medium Preference search criterion.
- The Campaign Wizard lets you segment packages by medium preferences.

Change License

The very first time someone starts to use a new Sumac installation, she is prompted to enter a security number.

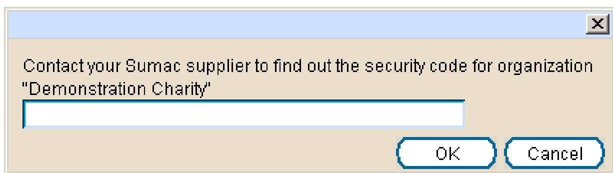
> Hint: Sometimes this initial step is unnecessary because the initial license is set up by your Sumac supplier.

The security number incorporates information about any restrictions on your license to use Sumac. In particular, the security number incorporates information about:

- Your organization name and default office.
- The maximum number of contacts allowed in your database.
- The expiry date for your Sumac license.
- The optional Sumac modules which you have licensed.

You may need to alter this security number if any of these items change, perhaps because you have licensed additional Sumac modules or you have recently renewed your license and have a new expiry date.

Choose the Change License menu command from the Administrator menu to receive a prompt for changing the security number. The prompt looks like this:



You need to communicate with the Sumac support organization to get the correct number. Then click OK.

Clear All Locks

Sumac locks records in order to ensure that only a single user can edit a record at once. If the computer of a user who is editing a record crashes, then the record will still be locked and no one will be able to edit it. When a user tries to edit a locked record, a message that says someone else is editing that record appears:

Simple Resolution

Choose the Clear All Locks menu command from the Administrator menu to clear all locks, enabling the editing of all records in the database.

More Complex Resolution

Sometimes choosing Clear All Locks does not work because not only are the records locked, but the lock management part of the database is also locked. When this happens you should:

- ✔ Quit Sumac on all computers in the office, so that no one is running Sumac.
- ✔ Start Sumac on one computer. Log on as an administrator.
- ✔ Choose the Clear All Locks menu command from the Administrator menu.

This sequence of steps ensures that all locks of any sort are removed from the Sumac database.

Managing Lookup Lists

Lookup Lists By Area

Lookup lists are used to ensure rapid, correct, uniform entry of information into a Sumac database. When a user is entering data into Sumac, there are many places where the user must choose an entry from a lookup list. For example, if the user is entering information about a DONATION, the user chooses the DONATION purpose from a drop-down menu of choices which come from a previously entered lookup list.

The following table indicates which lookup lists apply to which Area of functionality in Sumac:

Area	*Lookup List*
Auctions	Accounts
	Auctions
	Auction Categories
	Medium
	Unsold Disposition
Communications	Communication Types
	Event Types
	Sources
	Venues
Contacts	Cities
	Countries
	Contact Sources
	Contact Types
	Extra Fields
	Groups
	Group Types
	Incoming Email Accounts
	Languages
	Mandatory Fields
	Prefixes
	States (Provinces)
	Relation Types
	Time Zones
Course Registration	Accounts
	Courses
	Course Types
	Exam Mark Statuses
	Final Statuses
	Funding Sources
	Initial Statuses
	Sessions
Donations	Accounts

Area	*Lookup List*
	Document Templates
	Donation Types
	Event Types
	Funds
	Payment Types
	Venues
Facts	Asset Types
	Club Types
	Communication Contents
	Communication Media
	Industries
	Programs
	Schools
	Skills
	Skill Types
	Task Types
Fund Request	Expenditure Types
	Fiscal Years
	Funder Types
	Fund Request Statuses
Job Openings	Industries
	Job Opening Statuses
	Pay Timeframes
	Skills
	Skill Types
Memberships	Accounts
	Document Templates
	Membership Benefits
	Membership Types
	Payment Types
	Surcharges (Taxes)
Payments	Accounts
	Payment Purposes
	Payment Types
Pledges	Accounts
	Donation Types
	Event Types
	Funds
	Payment Types
Proposals	Gift Types
	Tables
Reminders	Action Plans
	Action Types

Area	*Lookup List*
	Document Templates
Sales	Accounts
	Adjustment Reasons
	Delivery Methods
	Discounts
	Products
	Surcharges (Taxes)
Submissions	Disciplines
	Festivals
	Mediums
	Statuses
Subsidiaries	Subsidiary Communication Types
	Subsidiary Contact Types
	Subsidiary Organization Types
Tickets	Accounts
	Adjustment Reasons
	Delivery Methods
	Discounts
	Event Types
	Payment Types
	Price Schemes
	Seat Blocks
	Sources
	Surcharges (Taxes)
	Venues
Time Dockets	Programs
Tour Booking	Booking Statuses
	Category As (name is configurable)
	Category Bs (name is configurable)
	Category Cs (name is configurable)
	Category Ds (name is configurable)
	Contribution Types
	Disciplines
	Duration Descriptions
	Feedback Sources
	Fiscal Years
	Holidays
	Payment Statuses
	Personnel Informed Statuses
	Payment Statuses
	Personnel Roles
	Program Themes
	Public Presentation Types

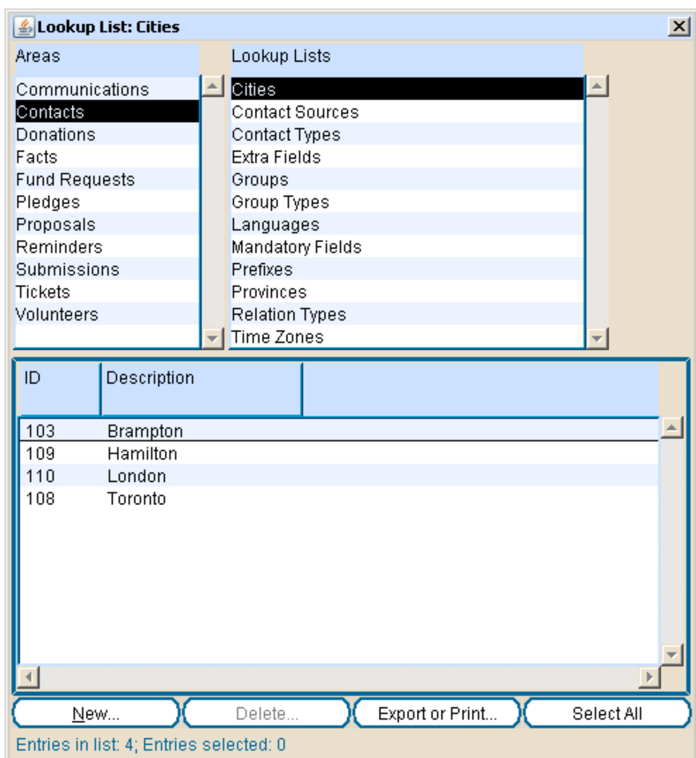
Area	*Lookup List*
	Surcharges (Taxes)
Volunteers	Departments
	Programs
	Skills
	Skill Types
	Task Types
	Volunteer Types
Grow-Your-Own	Grow-Your-Own Lookup 1s
	Grow-Your-Own Lookup 2s
	Grow-Your-Own Lookup 3s
	Grow-Your-Own Lookup 4s

Managing Lookup Lists

For suggestions of values to put into lookup lists, see *Appendix A – Suggested Values For Lookup Lists* on page 65.

> Hint: Do not put entries into lookup lists unless you are sure that they will be used. It is easy to add a new entry later, if it turns out to be necessary. But having unused or marginally useful values in a lookup list slows down data entry and confuses users.

To change the values in a lookup list, choose the Lookup Lists command from the Administrator drop-down menu in the Sumac Console[1]. This dialog appears:



[1] Two lists – Offices and Users – have special commands of their own in the Administrator drop-down menu, so they are accessed using these special commands rather than using the Lookup Lists command.

The dialog shows lookup lists grouped by Areas which are listed in the top left of the window. Click to select an Area (e.g. Contacts is clicked in the picture above). All the lookup lists that support that Area appear in the Lookup Lists list to the right.

Some lookup lists appear in more than one Area in the lookup list dialog. For example, COMMUNICATIONS, DONATIONS, and PLEDGES can all refer to event types, so the event types lookup list appears under all these Areas. But note that Sumac has only one list of event types; regardless of whether you change them from the COMMUNICATIONS area or from the PLEDGES area, you are working on the same list.

Click a lookup list (e.g. Cities is clicked in the picture above). The values for that lookup list appear in the bottom scrolling list.

When you have chosen a particular lookup list, you can use standard list manipulation techniques for scrolling in the list, double click to edit an entry in a list, or use these buttons below the list:

Button	*Usage*
New	Click this button to create a new entry in the list.
Delete	Click to select some entries in the list, then click the Delete button to delete them from the database.
Export or Print	Click to select some entries in the list, then click this button to export them to a text file, or print them.
Select All	Select All entries showing in the list.

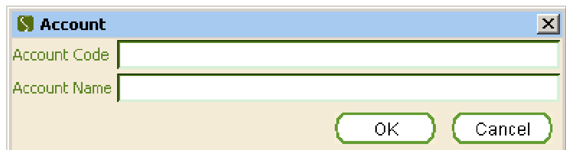
Lookup Lists

The following sections are arranged alphabetically. Each section describes the content of a lookup list.

There are many lookup lists needed to place TICKET ORDERS. For assistance in setting up lookup lists for Sumac Ticketing, see *Ticket Orders* in the *Sumac Users Guide*.

Accounts

When you receive a DONATION, you enter information about the DONATION into Sumac. Each DONATION can be associated with an account. The accounts, defined in this lookup list, enable Sumac to provide information about DONATIONS to your organization's financial accounting software.



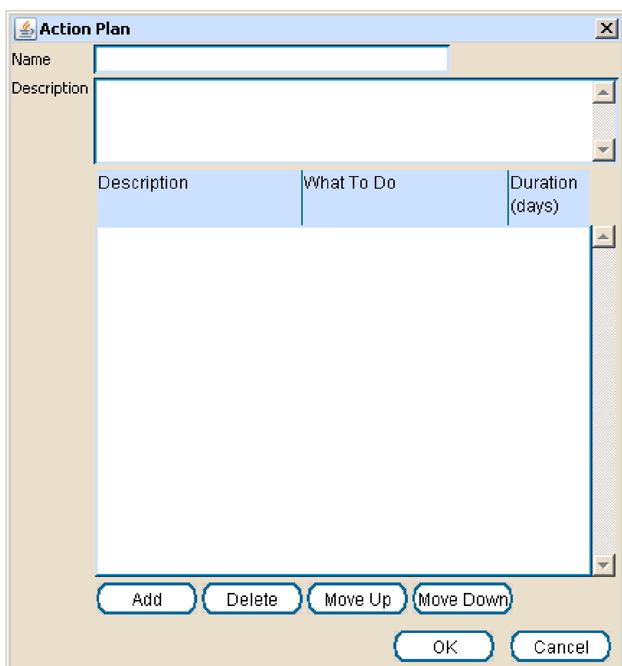
When you add an account to this lookup list, you enter two pieces of information:

- The code that is used by your financial accounting software.
- A name which is presented to users of Sumac so that they can make the appropriate choice.

Action Plans

If your organization uses standard work flows – sequences of steps to be performed, perhaps to process credit card expirations, to solicit DONATIONS, renew MEMBERSHIPS, or to run a CAMPAIGN – an action plan enables you to repeatedly perform these in the same way.

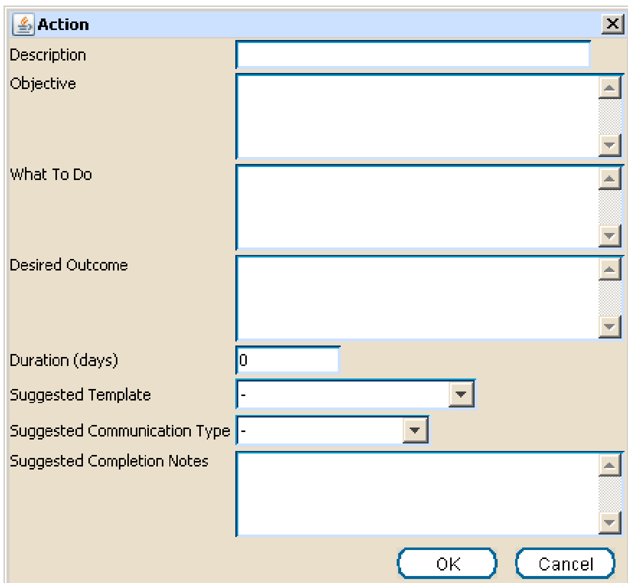
Click the New button to get this dialog for defining a new action plan:



Enter a brief name and longer description for the action plan. Then create the list of actions (steps) to be performed in the action plan. The list of actions is ordered, i.e. the sequence they appear within the action plan is the order in which they are expected to be performed. There are four buttons for managing the list of actions in an action plan:

Add	create a new action
Delete	delete the selected action
Move Up	move the selected action up in the list
Move Down	move the selected action down in the list

When you click Add, the following dialog appears for creating a new action:



Fill in the various fields:

- Description is a short description of the action.
- Objective is what the action is trying to accomplish.
- What To Do describes the actual activities to be performed. The content of this field is put into the What To Do field of reminders that are created from this action.
- Desired Outcome describes where a user should be in performing the action plan once this action is completed.
- Duration is the typical number of days for doing this action.
- Suggested Template is a document template that is typically used (e.g. for merging to create a document to be sent to a contact).
- Suggested Communication Type is a likely type of communication for this action.
- Suggested Completion Notes are text that can be used in a communication to indicate that the action is done.

Action Types

Action Types are associated with reminders. Each reminder can indicate the type of action (e.g. phone call, email) that is needed to finish the reminder.

Adjustment Reasons

If the value of a TICKET ORDER needs to be adjusted, then an adjustment reason must be specified. The user making the adjustment can manually enter the reason for the adjustment, or alternatively can just choose one from this lookup list.

Asset Types

You can specify Asset Facts for CONTACTS. This lookup list indicates the types of assets you wish to record.

Attendance Statuses

In the Course Registration module, you can indicate that attendance status (attended, absent, absent with an excuse) of each student at each class. This lookup list is the possible statuses.

Attributes Being Measured

This lookup list specifies which numerical attribute of a collection object is being measured. Examples: weight, height, depth, density, opacity.

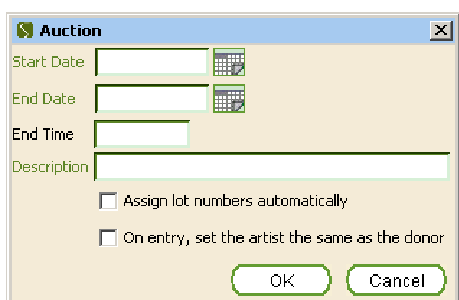
Attribute Types

When entering a non-numeric attribute for a collection object, you choose from this lookup list to indicate the type of attribute being entered. For example: description of general condition.

Auction Categories

These categories are used to specify the category of a particular lot in an auction. The categories depend on the types of auctions that your organization performs. If it is an art auction, then the categories might be: three dimensional, master works, glass, and oil. If it is a general merchandise article, categories might be: sports equipment, entertainment, books & videos.

Auctions



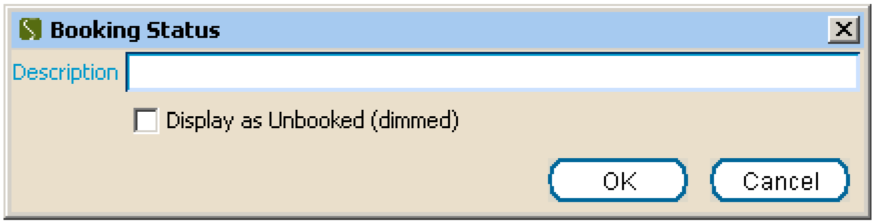
Define each auction. Indicate its start and end date and a brief description. This description will be used in drop-down menus for adding lots to the auction.

If you want, Sumac can automatically assign lot numbers as lots are entered. If you do not check this option, then you must manually assign lot numbers.

When entering lots, in some types of auctions you specify a donor and an artist who are usually the same. In this case, click to have Sumac automatically set the artist the same as the donor (this can be over-ridden for any particular lot).

Booking Statuses

Booking statuses apply to Tour Booking programs.



Enter a description of the booking status. A program with this booking status can be displayed differently (dimmed or grey), if you click the check box; this is used to indicate a tentative or planned, but not yet confirmed, booking.

Buildings

These are buildings that can store collection objects.

Category As, Bs, Cs, and Ds

These four categories are used to describe various attributes of Tour Booking programs. The Preferences command in the Administrator menu can be used to give them more meaningful names, or to exclude them from use.

Category A entries show up as check boxes, so each program can have any number of attributes from Category A.

Categories B, C, and D appear in the user interface as drop-down menus, so each program may have at most one attribute from these lists.

Cities

When a user enters a CONTACT into Sumac, the user typically enters one or more mailing addresses for the CONTACT. These addresses contain cities.

Entering the names of cities can be made speedier and more accurate by using the lookup list of city names. If a user types a partial city name, Sumac fills in the full name. For example, if the city list has these names:

Boston
New York
Seattle
San Francisco
Saskatoon
Toronto
Vancouver

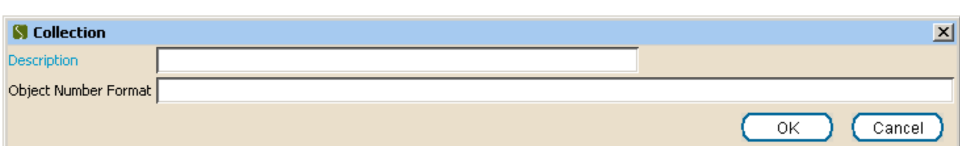
type *t* to get Toronto. Note that with this list, the user would have to type *se* to get Seattle, and *san* or *sas* to get San Francisco and Saskatoon respectively.

Club Types

Users can enter facts about CONTACTS. One type of fact is clubs that the CONTACT has been a member of. Club memberships can be of a certain type. The types are chosen from this lookup list.

Collections

Specify the name of the collection.



If you want to specify the format of object numbers that should be used for the collection, you enter the pattern, that the object numbers should match, into the Object Number Format field. Here are things that you can use to specify a pattern:

Backslashes, escapes, and quoting

The backslash character (\) serves to introduce escaped constructs, as defined in the table above, as well as to quote characters that otherwise would be interpreted as unescaped constructs. Thus the expression \\ matches a single backslash and \{ matches a left brace.

Characters

`x`	The character *x*
`\\`	The backslash character
`\.`	The dot (period) character

Sequencing

`XY`	*X* followed by *Y*
`X|Y`	Either *X* or *Y*

Character Classes

`[abc]`	`a`, `b`, or `c` (simple class)
`[^abc]`	Any character except `a`, `b`, or `c` (negation)
`[a-zA-Z]`	`a` through `z` or `A` through `Z`, inclusive (range)
`[a-d[m-p]]`	`a` through `d`, or `m` through `p`: `[a-dm-p]` (union)
`[a-z&&[def]]`	`d`, `e`, or `f` (intersection)
`[a-z&&[^bc]]`	`a` through `z`, except for `b` and `c`: `[ad-z]` (subtraction)
`[a-z&&[^m-p]]`	`a` through `z`, and not `m` through `p`: `[a-lq-z]` (subtraction)

Predefined character classes

`[abc]`	`a`, `b`, or `c` (simple class)
`.`	Any character (may or may not match line terminators)
`\d`	A digit: `[0-9]`
`\D`	A non-digit: `[^0-9]`
`\s`	A whitespace character: `[ \t\n\x0B\f\r]`
`\S`	A non-whitespace character: `[^\s]`
`\w`	A word character: `[a-zA-Z_0-9]`
`\W`	A non-word character: `[^\w]`

Greedy quantifiers

`X?`	*X*, once or not at all
`X*`	*X*, zero or more times
`X+`	*X*, one or more times
`X{n}`	*X*, exactly *n* times
`X{n,}`	*X*, at least *n* times

`X{n,m}`	*X*, at least *n* but not more than *m* times

Reluctant quantifiers

`X??`	*X*, once or not at all
`X*?`	*X*, zero or more times
`X+?`	*X*, one or more times
`X{n}?`	*X*, exactly *n* times
`X{n,}?`	*X*, at least *n* times
`X{n,m}?`	*X*, at least *n* but not more than *m* times

Example

Here is a pattern that allows one to three digits, followed by a period, followed by one to two digits:

```
[0-9]{1,3}\.[0-9]{1,2}
```

Communication Contents

[release note: in a future release of Sumac, the use of communication types to describe a contact's communication preferences will be replaced by Communication Content, Communication Medium, and Program facts]

Users can enter Preferred Content facts for each contact. This preferred content indicates the type of communications (e.g. monthly newsletter, annual report, event announcement) that the contact wishes to receive.

Communication Media

[release note: in a future release of Sumac, the use of communication types to describe a contact's communication preferences will be replaced by Communication Content, Communication Medium, and Program facts]

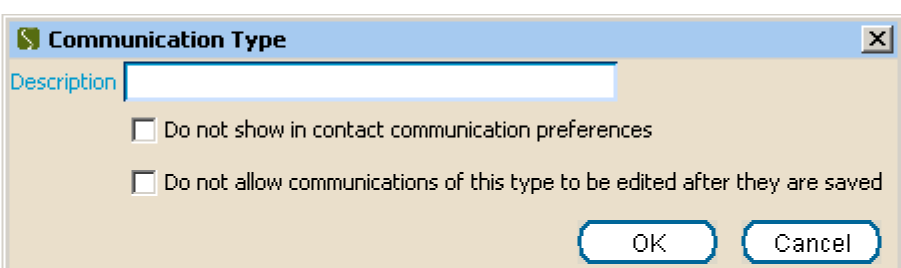
Users can enter Preferred Medium facts for each contact. This preferred medium indicates the medium on which the contact wishes to receive information.

Communication Types

Communication types are used in two ways:

- Sumac can record information about every communication that occurs with a contact. Every communication must be of some particular communication type.
- You can specify the types of outbound communications that each contact wants to receive. This ensures that you do not send your contacts unwanted information, and also saves you the cost of sending information that will be ignored.

Here is the dialog for entering a new communication type:



When you enter a communication type, you specify its name.

If the communication type is not an outbound communication (e.g. Newsletter, Solicitation) that should appear in the Outbound Communications Desired area of a contact record, then select *Do not show in contact communication preferences*.

If you use Sumac to store case notes or similar documentation about clients, the notes may be subject to rules regarding editability. If these types of communications should not be editable once they have been entered, then select *Do not allow communications of this type to be edited after they are saved*.

Contact Sources

How did a CONTACT first get in touch with your organization? When you add a CONTACT to the database, you can indicate this useful piece of market analysis information by choosing from a lookup list.

This list of contact sources specifies the possible sources that your marketing department wishes to track.

For recording the source of a TICKET ORDER or COMMUNICATION, see *Source* on page 51.

Contact Types

Each CONTACT in the database may be of one or more types. For example, the CONTACT may be a volunteer and a board member. This list lets you specify the type information you want to track in your database. The CONTACTS list allows you to show all the CONTACT types applicable to any particular CONTACT, and also to search and instantly show all CONTACTS of a particular type.

Content Types

When you enter a media attribute for a collection object, you must specify the type of content in the media. For example: biographical, primary content, photo, descriptive.

Contribution Types

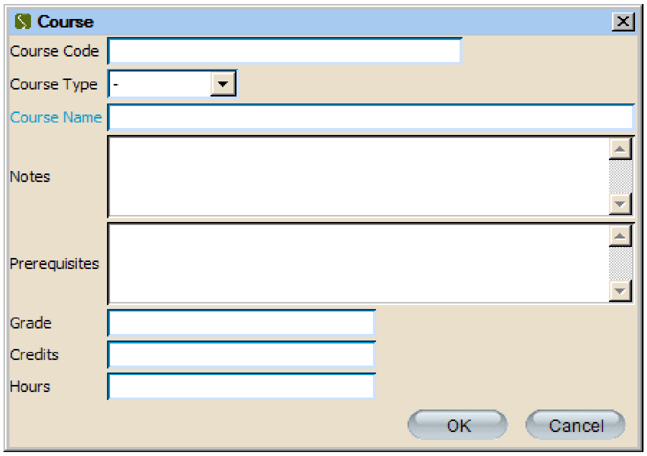
Tour Booking programs can have a list of one or more sponsors. The type of contribution made by each sponsor (e.g. cash, services, facilities) can be specified by choosing from this lookup list.

Countries

When entering mailing addresses in CONTACT records, there is a drop-down menu of country names. These come from this lookup list.

Courses

This list contains the courses for which course registration can be performed.



The *Hours* fields is used to indicate how many credit hours a student receives.

Course Types

This is a list of types of courses. These types are used to group courses into broad areas.

Delivery Methods

This is a list of methods used to deliver TICKET ORDERS to CONTACTS.

Departments

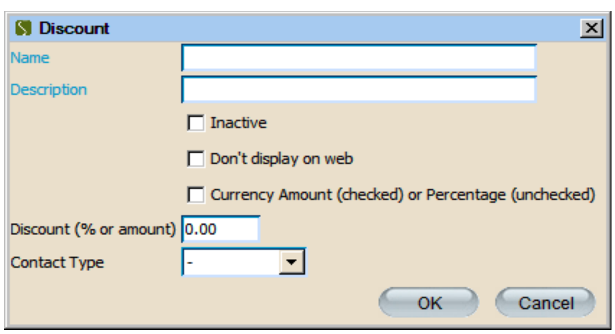
A department is a part of your organization, or one of the types of services your organization performs. TASKS to be performed can be associated with a particular department. This provides a convenient break-down, enabling you to organize and search for tasks based on which part of your organization performs or manages the tasks.

Disciplines

This lookup list specifies the discipline or expertise of a CONTACT making a SUBMISSION.

Discounts

Discount rates can be applied to products or to tickets being sold.



Note that when a discount is no longer being used, you can mark it as Inactive. An inactive discount no longer appears in drop-down lists of discounts, so users cannot apply it to a ticket order or sale.

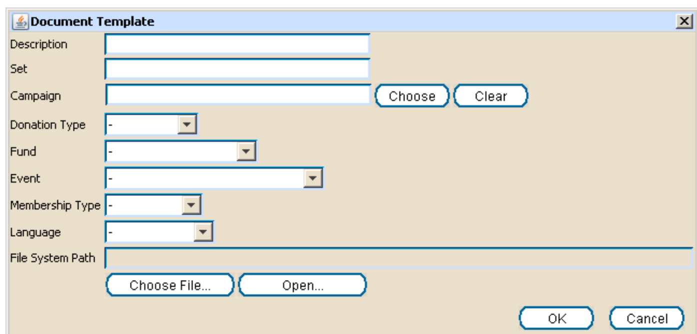
You can also indicate that a discount should not be displayed on the web. This applies to online ticketing. If you want to make certain discounts available only to people who call in to your box office, not to those who order tickets over the web, then click this check box.

The discount rate can be expressed as a currency amount (click the check box) or a percentage (do not click the check box).

If this discount rate should be available only to contacts with a specific contact type, choose the applicable contact type from the Contact Type drop-down menu.

Document Templates

Document templates stored in Sumac are actually references to document template files stored in the file system on your computer or a server. This list is used for sending standardized communications based on membership types. It is also used to relate a document template to an action in an action plan.



The minimum information that you should specify in a document template is the Description, and the document itself (click Choose File to set the File System Path field). If you have clicked to choose a file, you can click the Open button to cause Sumac to open the file using the standard editor for the type of document chosen.

The rest of the fields are specified in order to enable Sumac to pick the correct template from a set of templates. Here is how sets of templates work:

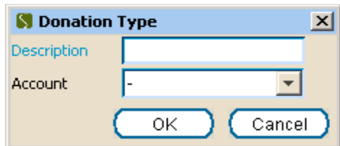
- At present, the only context in which Sumac can automatically choose document templates from a set is when it is generating receipts for donations. Consequently, the Membership Type drop-down menu is always ignored.

  Hint: You must tell Sumac to prompt users for a set of templates when the user is creating donations. You do this by choosing the Preferences command in the Administrator menu, choosing the Mail Merge tab, and clicking the appropriate option to turn on sets of templates.

- Specify the same Set name for several templates that are to be treated as a set. At the time a user generates donation receipts, the user is asked to pick a set of templates.
- Choose values for the the document template fields which describe the types of donations to which the document template applies. For example, if you have two templates, one for French and one for English, specify the two templates to have the same Set, but in the Language drop-down menu choose French for one and English for the other.
- Note that if you specify a field in a document template, then Sumac only matches it to donations that have the same value for the field. Be careful to

make sure that there is always an applicable template. For example, if you specify one template for English and another for French, what would happen if no language is specified for a contact? In this case you would need a third template that has no language specified. Alternatively, you could remove the language specification for one of the two templates (e.g. the English one), thereby making it apply to all donations other than those from French contacts.

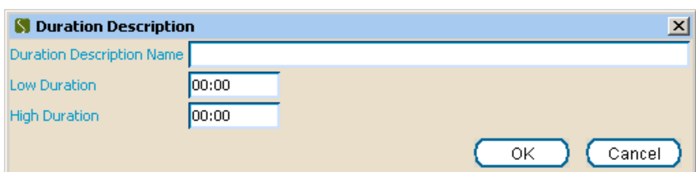
Donation Types



Type of donation indicates a general class for the donation. This is used to provide a general break-down of the donations, particularly useful in summarizing and reporting. When entering a donation type, the possible values come from this lookup list.

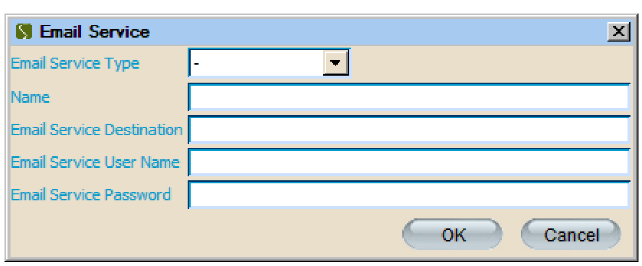
If you specify that the donation type relates to a particular account, then as a user enters a donation and chooses the donation type, Sumac automatically chooses the account. This saves data entry time.

Duration Descriptions



Tour Booking workshops are listed within their program. Their times and durations are displayed. If you want Sumac to automatically categorize the workshops, providing a name based on their duration, you can specify the durations. For example, if a workshop that is between 2.5 and 4 hours is considered to be a half day, you could give it a description of “half day” and enter 2:30 and 4:00 as the applicable durations.

Email Service



If you want to use a third party product for sending email to the contacts in your Sumac database, define an email service.

If any email services have been defined then, when a user clicks the Export button in the contacts list, the user is given the option of sending the contacts to an external email service.

Event Types

Sumac can help you keep track of events, and the responses to them. donations, pledges, and communications can be associated with events. Each event must be of a particular type: perhaps a fundraising event, a performance, or a board meeting. This list of event types is where you indicate the possible types of events for your organization.

Exam Mark Statuses

The Sumac Source Registration module enables you to record marks for exams. Each mark can have a status, typically things like: final, interim, or under appeal.

Exhibit Types

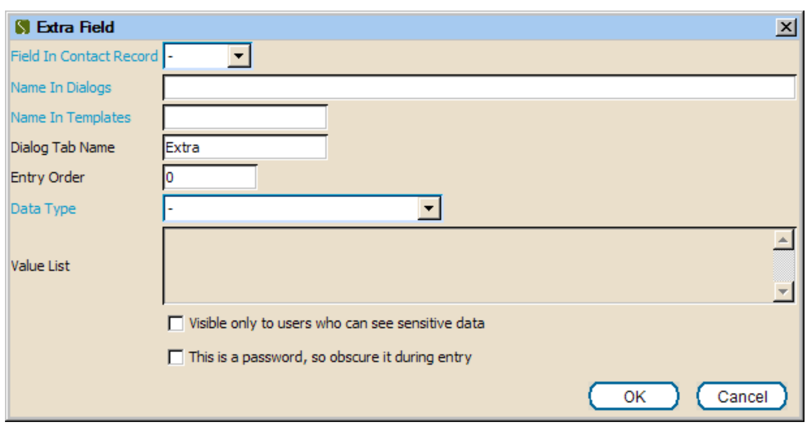
[not being used yet] When entering an exhibit location for an object, you can specify the type of exhibit.

Extra Fields

Sumac can hold extra fields of information, specially defined by your organization, for each contact in the database. These fields can be used to store information that is not already specifically identified in the standard fields in Sumac contact records. These fields can be used just like any other fields in a contact record: for searching, entry, display.

Before you can put information into the extra fields, you must use the list of extra fields to tell Sumac what will be put into the extra field, and how it will be used.

When you define an extra field, it appears in one or more extra tabs in the dialog for editing each contact. A user can navigate to this tab, and enter and edit information in each extra field. Extra fields can be presented in the user interface in several different ways. Here is the window for defining a new extra field:



For each extra field, you specify:

- Field in Record: Choose one of the extra fields. Until you allocate them to some purpose, they are given default names of Extra 1, Extra 2, etc.
- Name In Dialogs: Specify the label that will appear on this field in the dialog for editing contacts, and in the list of field names used to import and export contact information.
- Name In Templates: Specify the name that will be used to refer to this field when it is being used in a document template. Note that a name for use in a template must not contain spaces. Note that the name you enter here should not have a *c_* prefix, but when you use it in a template it must be prefixed by

*c_*; e.g. if you enter *instrument* when defining the extra field, then the template must refer to *c_instrument*.

- Dialog Tab Name: You can group extra fields into different tabs in the contact editing dialog. Enter here the name of the tab. All extra fields whose dialog tab name is the same will be presented in the same tab of the contact dialog.
- Entry Order: Enter a positive integer to indicate the order that the field should appear within its tab in the contact dialog. Note that these numbers do not need to be sequential. It is often convenient to enter them 5 or 10 apart so that if you later need to insert a field between two others, you just enter a number between the two rather than having to re-sequence all the fields.
- The Data Type drop-down list allows you to specify how the field should appear in the contact entry and editing dialog:

Data Type	*User Interface Presentation*
Text	A fairly short text field for free-format text.
Long Text	A text field presented in a box three lines high, with a scroll bar on the right hand side.
Date	A field for manually typing a date, and an icon for using a calendar to choose a date.
Number	A text field that must hold a number.
Checkbox	The field is presented as a check box. The field name appears as the label on the check box.
Drop-down Menu	A drop-down menu containing the choices specified in the Value List (see below). A user who chooses from this drop-down menu, is still able to edit the value given to the extra field. For example, if the user chose *flute* from a value list of musical instruments, the value of the extra field would be *flute*. But the user could then click and type in the field to change the value to *alto flute*, even though *alto flute* was not a choice available from the Value List.
Luhn Validated	A text field that must hold a number. The number is validated using the Luhn algorithm (which validates most credit card numbers, Canadian Social Insurance Numbers, and other ID numbers).
Checkbox Group	The field is presented as a set of check boxes. The check boxes can speed up entry into the extra field, and make display of the data more readable. The check boxes cause an entry into a text field, which is also visible. The text field is editable.
Checkbox Group, Uneditable Text Field	This field type is the same as Checkbox Group above, however the text field associated with the check boxes is *not* editable.

- For a field that is a Drop-down Menu or a Checkbox Group, the values in the menu or check boxes come from the Value List field. Each value is separated from the others using a semi-colon.
- Check the *Visible only to users who can see sensitive data* to restrict this field to only uses whose profile allows them to see sensitive data. This enables sensitive client information to be protected.
- Check the *This is a password field, so obscure it during entry* to show the content of this field as bullets, instead of the actual text that is in the restrict this field to only uses whose profile allows them to see sensitive data.

Feedback Sources

You can record feedback for each Tour Booking program. Each feedback entry can indicate its source.

Festivals

Each SUBMISSION must be associated with a festival – a grouping of SUBMISSIONS for a particular planned event or group of events. Note that the term "festival" can be changed to be something else – a grouping of SUBMISSIONS more appropriate to your organization. See *Submissions* in the *Sumac Users Guide*.

File Types

When you enter a media attribute for a collection object, you must specify the type of file. For example: video, image, text.

Final Statuses

A course registration entry can have an initial status and a final status. Final status would typically be used to indicate that a student completed a course, dropped out, or failed.

Fiscal Years

Tour Booking programs can be associated with a fiscal year. The names of the fiscal years can be specified in this lookup list. They appear in the user interface as a drop-down menu.

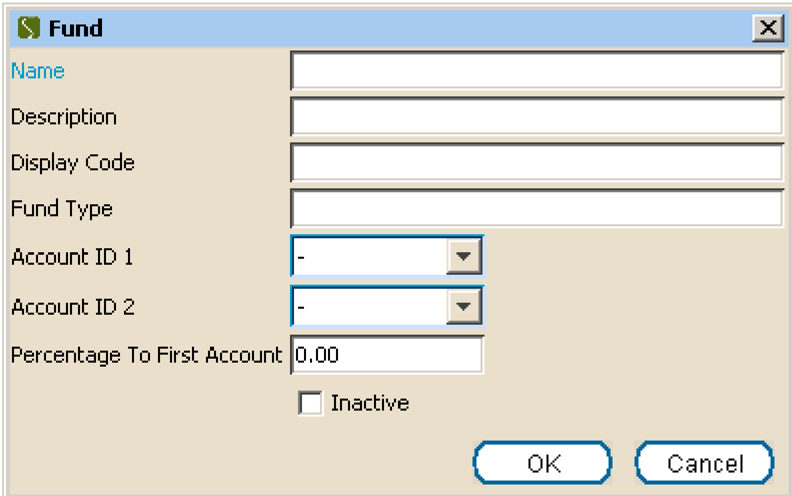
Funds

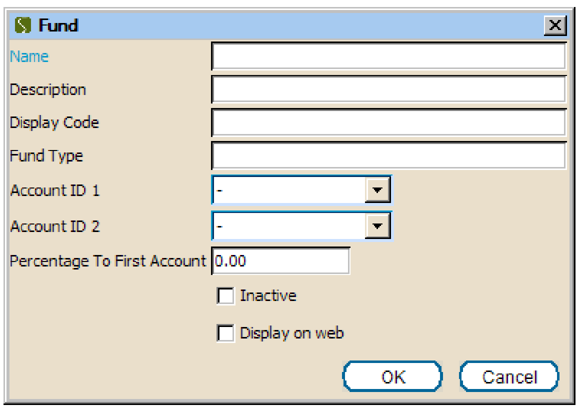
This list allows you to track the purpose for which each DONATION was made. You may choose to track the purposes of DONATIONS, if your organization:

- allows a donor to specify a purpose
- appropriately allocates the DONATIONS based on the donor-specified purpose, and
- internally accounts for DONATIONS by purpose.

Donation Splitting

Sumac allows you to allocate a donation to a fund which is split between multiple accounts.





Specify the first and second accounts between which donations for this fund should be split. Also, specify the percentage of the donation that is supposed to go the first account; the balance goes to the second account.

If it should no longer be possible to use this fund for new donations, then click the *Inactive* checkbox.

If you are using Sumac to support donations or pledges through your website, and want donors to be able to direct their donations to this particular fund, then click *Display on web*.

Funder Types

Each CONTACT can, optionally, be classed as a funder. The CONTACT record provides a drop-down menu for specifying which type of funder each CONTACT is. The values in this drop-down menu come from the Funder Type lookup list.

Fund Request Statuses

As a FUND REQUEST moves through various stages from initial contact to final report, you can keep track of its status. Specify the different statuses that you want to use in managing FUND REQUESTS.

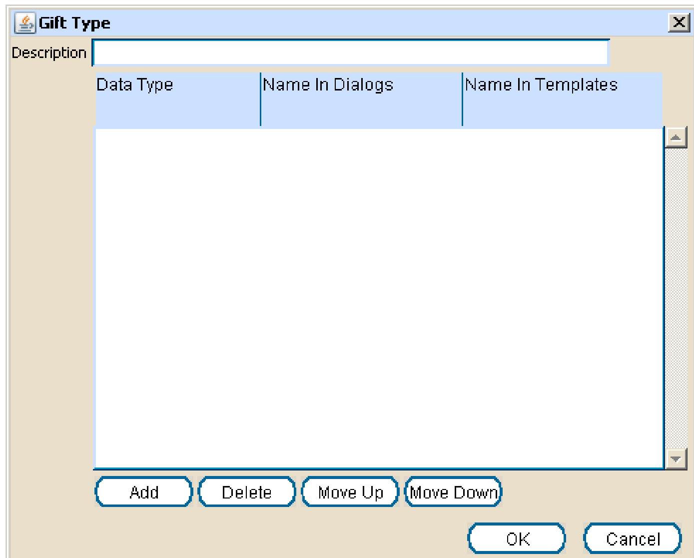
Funding Sources

Each student registration in a session of a course may specify a different funding source. This enables you to keep track of whether a student is paying for the training, or whether it needs to be billed to an external funding body.

Gift Types

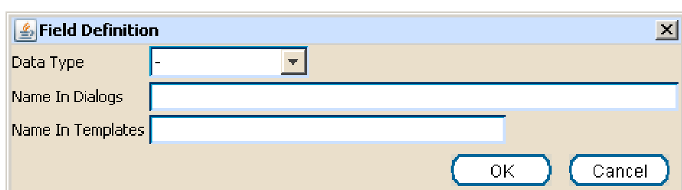
Each proposal indicates the type of the gift that a CONTACT is proposing to make. The gift types come from this lookup list.

In Sumac, a gift type contains a list of additional information needs to be gathered to describe a gift of that particular type. When you create a new gift type, this dialog appears:



Click Add to add a new piece of information to be gathered for a gift of this type. Click Delete to delete one. Click Move Up and Move Down to re-order the list to an appropriate order for a user to gather the information.

When you click Add, this dialog appears:



Choose the type of data being gathered, specify a prompt that can tell a user what needs to be entered, and specify a name to be used for this field when it appears in a template. Note that the name entered for use in a template should not start with *i_*, but when it is used in a template it must be prefixed by *i_*; e.g. if you enter a name of FairMarketValue, then in a template you must use i_FairMarketValue.

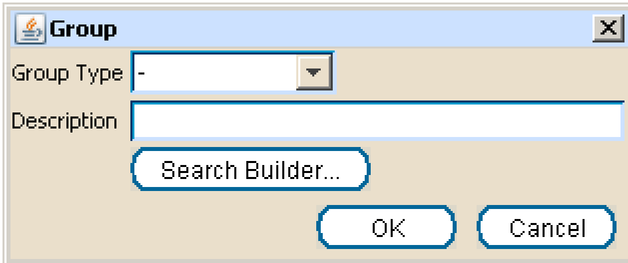
Groups

A group is a set of search criteria pre-built (by the Sumac Administrator), the same as those generated by Search Builder. There are two main uses for groups:

- CONTACTS who are going to receive (or not receive) information in a particular CAMPAIGN can be identified using a group.

- Groups can also be used to perform searches in the CONTACTS list.

When you create a new Group, this dialog is presented:



Choose the type of group (see *Group Type* below), and give the group a name or brief description. Then click the Search Builder button to define the search that is to be performed in order to find the CONTACTS who are members of this group.

Here are suggested steps for creating a Group:

- ✔ Open the CONTACTS list, and click its Search Builder button.
- ✔ Develop the search criteria, testing them as you go using the Show ?? Contacts button.
- ✔ Note that you can save intermediate working versions of the Search Builder search to files.
- ✔ When you are sure that the criteria you have specified do the desired search, click the Save As Group button to create a new group in the database, making it available to all users.

Group Types

Groups can be organized by types. Typical types would include common searches used in the CONTACTS list, or exclusions used when creating CAMPAIGNS.

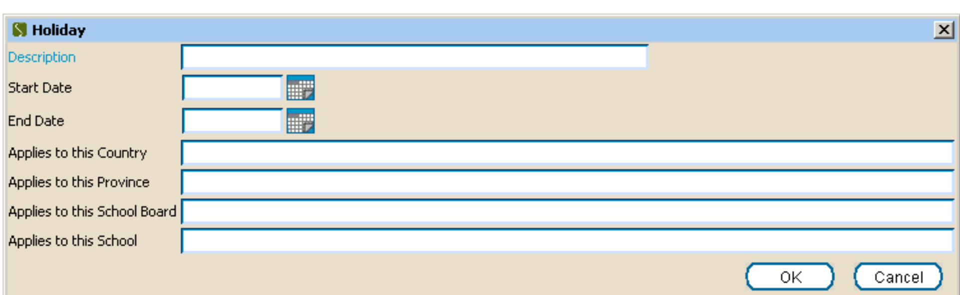
Note that once you have set up a group type that means exclusion, you should use the Preferences to tell Sumac which it is. This enables Sumac to present an appropriate list of groups when a user is setting up a new CAMPAIGN. Examples of exclusion groups include a group that finds deceased CONTACTS, or one that finds CONTACTS who have moved.

Grow-Your-Own Lookups

There are four lookup lists available for use in Grow-Your-Own objects. The meaning of these lists is defined by field definitions for the Grow-Your-Own objects. For further information, see *Grow-Your-Own* in the in the *Sumac Users Guide*.

Holidays

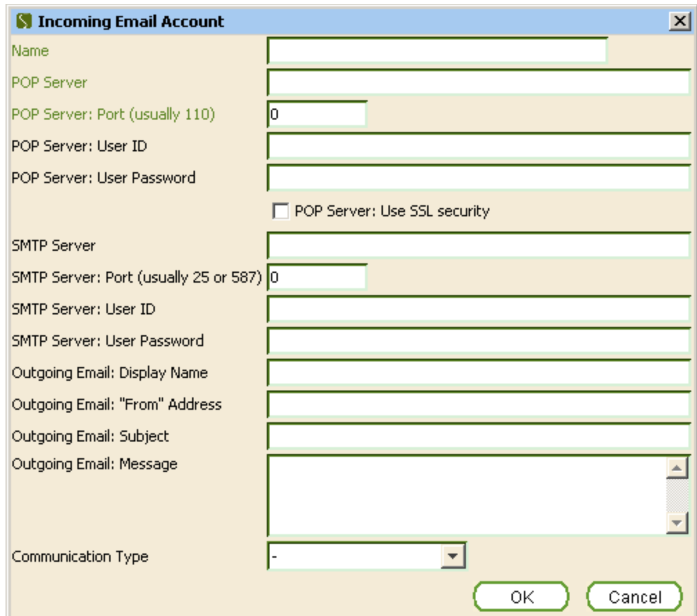
The Tour Booking module allows you to view workshops in a calendar view. In this view, holidays show up as a bar on the right hand side of a cell. Clicking the bar shows the holidays.



You must enter a description of the holiday. All other fields are optional, but the dates are necessary for Sumac to be able to display the holiday in the calendar.

Incoming Email Accounts

You can configure Sumac to receive email sent to specific email addresses. Create and Incoming Email Account record for each email address:



Here are descriptions of the fields that define an Incoming Email Account:

Name	A brief name that identifies this incoming email account. Users will see this name in a drop-down menu for choosing which incoming email account to process.
POP Server	Use this group of fields to specify the POP server that Sumac should connect to to get the email, the user ID on that POP server, and whether to use SSL security.
SMPT Server	If a Sumac user who is receiving email should be able to send responses to the emails, then use this group of fields to specify the SMTP server for sending email, and the user ID on that SMTP server.
Outgoing Email	Use this group of fields to specify default values for information in responses sent to the incoming emails.
Communication Type	Often incoming mail is used to process requests to add or remove a contact from a mailing list. In Sumac, mailing lists are identified by communication types. If the purpose of this incoming email account is to add or remove contacts to or from a mailing list, then choose the corresponding communication type. This enables Sumac to automatically add and remove contacts from the appropriate list.

Industries

Users can enter facts about contacts. One type of fact is employment history. One of the fields in an employment history fact is the industry of the employment. The industries are chosen from this lookup list.

Initial Statuses

A course registration entry can have an initial status and a final status. Initial status can be used to indicate the student's status before taking the course: perhaps a special admission information, or funding source information.

Insurance Action Types

When you specify an insurance action for a collection object, you can enter the type of insurance action. For example: initial valuation, renewal valuation, termination.

Job Opening Statuses

Each job opening has a job opening status indicator. This may indicate that the job opening is still available, or that it has been filled.

Languages

This lookup list holds the languages that can be chosen from a drop-down menu. If each contact has a specified language of choice, then you can customize document templates to communicate to each contact in his or her language. This same list is used for specifying the alternate language (Language 2) for each contact.

Location Statuses

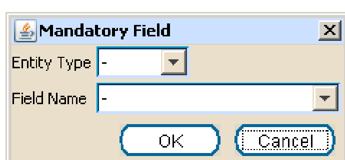
When you specify a location for a collection object, you can enter the status of the location.

Location Types

This lookup list indicates the type of a location holding a collection object. For example: off-site storage, loan exhibit, permanent exhibit.

Mandatory Fields

This list allows you to specify which fields are mandatory for the entry of a contact.



You must specify two pieces of information about each Mandatory Field:

- Entity Type: the type of record for which a specific field is mandatory (at present, you may only specify mandatory fields for contacts)
- Field Name: once you have chosen the entity type, the Field Name drop-down menu enables you to specify the field that is mandatory.

Hint: Last Name should always be mandatory. Postal Code and Phone Number are also frequently chosen as Mandatory Fields.

Materials

When specifying a physical property of a collection object, you use this lookup list to indicate the material it is made of.

Media

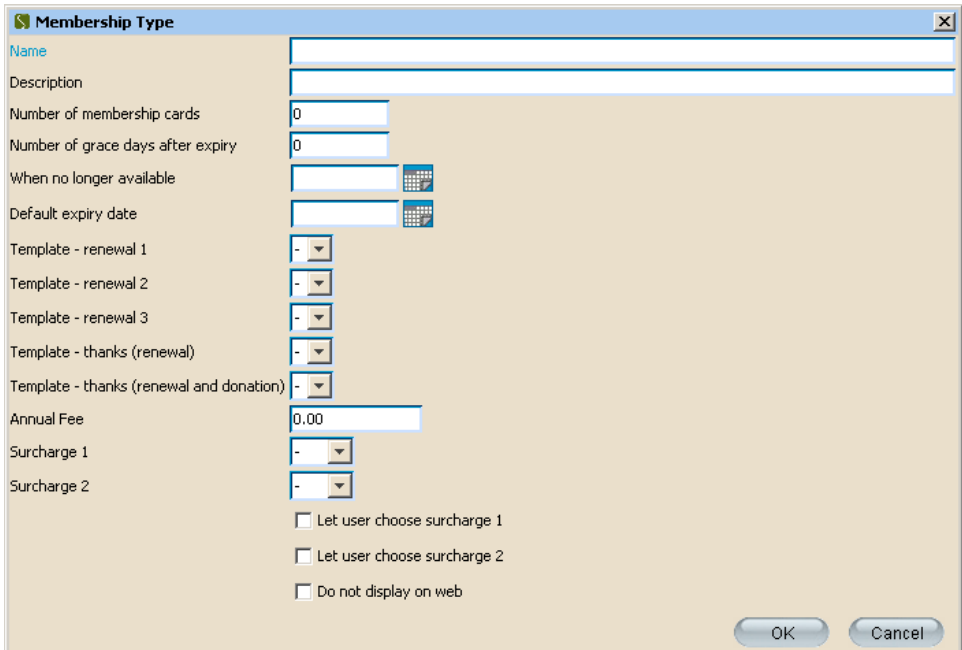
Submissions are often on a specific medium. This lookup list contains all the different types of media that your organization accepts.

Membership Benefits

These are the benefits that a membership of a particular membership type receives.

Membership Types

Each membership must be of a particular membership type. The membership type indicates the cost and the benefits associated with different levels or classes of memberships.



You can pre-set a default expiry date for each type of membership. If a certain class of membership always expires on the same date, then this saves having to enter the expiry date into every membership record of that type.

If there are standard templates that you use for renewal and thank you messages, you can specify these templates.

A membership can have up to two surcharges. You can choose the applicable surcharges from drop-down menus. Alternatively, if you want users to be able to specify which surcharge(s) apply, click one or both of the *Let user choose surcharge* check boxes.

You can also indicate that a particular membership type should *not* be displayed for renewals occurring through your website.

Object Relations

When specifying the relationship between two collection objects, this drop-down menu indicates the type of relationship that one object has to another. For example: components, sequential drafts.

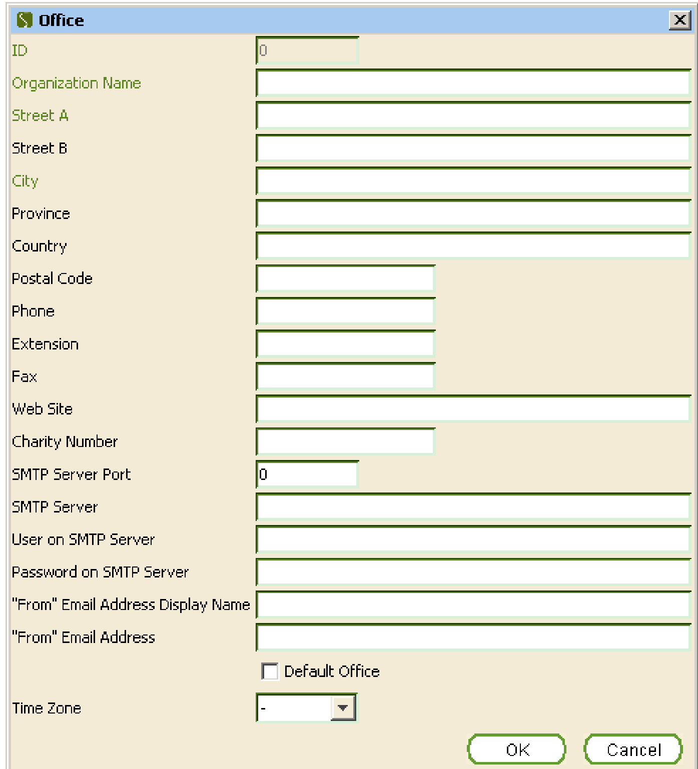
Offices

This list is where you enter information about your offices. You must specify the name of your organization. It is also helpful to specify address and phone information, since these can be included into documents generated using document template files.

If you use Sumac to send email, then enter the information needed to send emails from a particular office. When you send email messages to CONTACTS, the list of offices appears as a drop-down menu: you choose an office so that Sumac knows which SMTP (mail sending) server to use and also so that it knows the sender (return email address) for the messages.

Ensure that at least one of your offices is selected as the default office by clicking This Is The Default Office. This office is the one from which Sumac gets information when it needs to insert office-related information into a document being created from a document template.

The default office is also the office used to calculate licensing and other security related information. If you change which office is the default, or if you change the Organization Name in the default office, you need to re-enter the licensing information for your Sumac installation. Contact your Sumac support organization to obtain the new licensing information.



Pay Timeframes

When specifying the rate of pay for a job opening, you should also specify a pay timeframe. These typically indicate that the rate of pay is hourly, weekly, monthly, or per year.

Payment Purposes

Each payment record can have a purpose. These record why your organization received the payment. For example, you may receive a payment for a ticket order, for a sale, or for attendance at a seminar.

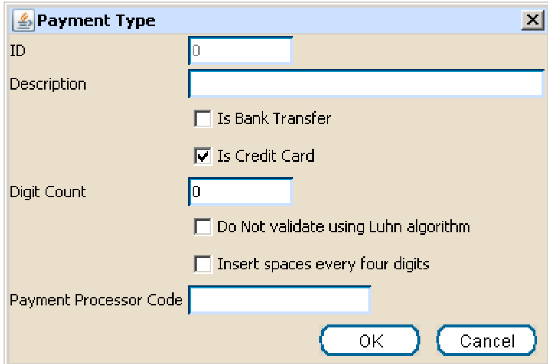
Payment Statuses

You can specify the payment status of a Tour Booking program. These appear as a lookup list in the Billing tab for the program. Appropriate payment status entries might include billed, paid, and overdue.

Payment Types

Uses of Payment Types

Donations are received using different payment methods. Each donation must be of a specific payment type. Pledges create donation records, so pledges also use the same payment type list to indicate the payment type of donations. You also specify a payment type for each payment record associated with a donation or ticket order.



Here is what each field in a payment type means:

Field	*Usage*
Description	This is the name that appears in the drop-down list of payment types
Is Bank Transfer	Click to indicate that this payment type is a bank transfer. Sumac gathers additional bank-related information about these payments.
Is Credit Card	Click to indicate that this payment type is a credit card. Sumac gathers additional credit card details about these payments. Also, the subsequent fields apply only to credit cards.
Digit Count	How many digits are in this credit card (MasterCard and Visa are 16, American Express is 15).
Do Not validate using Luhn algorithm	Most credit card numbers are verified regarding length and check digits. Normally you should *not* choose this check box. Choosing it disables certain validations performed on credit card numbers.
Insert spaces every four digits	Click to insert spaces when showing credit card numbers.
Payment Processor Code	If you connect Sumac to a payment processor, this code is required by the payment processor to identify each type of credit card. If you are using IATS as your payment processor, then the codes are as follows: American Express AMX Diners Club DC MasterCard MC Visa VISA

Personnel Informed Statuses

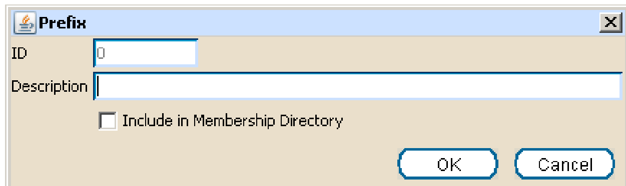
In the Tour Booking module, you can specify personnel to deliver a workshop. You can record whether each person is confirmed for a role. Possible values for this lookup list: confirmed, proposed, accepted, notified, declined.

Personnel Roles

In the Tour Booking module, you can specify personnel to deliver a workshop. You can specify the role each person is to assume with respect to the workshop. Possible values might include: primary presenter, support, volunteer.

Prefixes

When a user enters CONTACT information, one of the fields for each CONTACT is a prefix, or title. You can standardize on prefixes, and speed up their entry, by putting them into this lookup list.

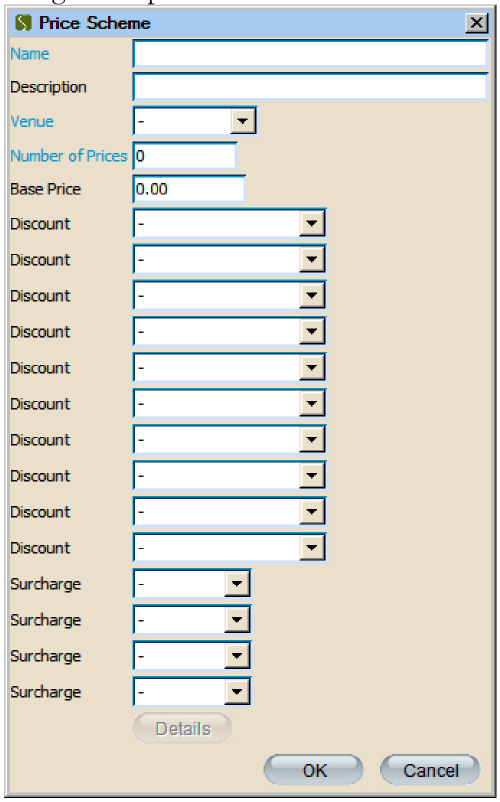


If you have licensed Sumac Membership, then there is also a check box in the dialog. This check box indicates whether this prefix should appear in front of CONTACT'S names when they are put in an automatically generated membership directory. This enables you to include some prefixes (e.g. Dr or Sir) while excluding others (e.g. Mr or Mrs).

Price Schemes

A pricing scheme specifies the price of each seat in a particular venue. There may be several price schemes for a single venue. You may have different pricing for Friday night performances than for Sunday matinées. You may have different pricing for one performance than for another.

The dialog for creating a new price scheme looks like this:



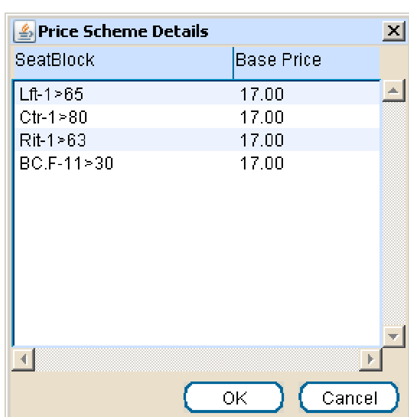
Choose the Venue from the drop-down list of venues. Specify a Name and Description for the price scheme.

Then indicate the Number of Prices. This will always be at least 1, and you enter the primary price in the Base Price field. Note that the Base Price can be zero, if this price scheme is for an event for which no admission fee is being charged.

If you have discounted ticket prices, then choose the discounts that are available from the Ticket Discount drop-down menus.

If there are standard surcharges that should be charged on each order of tickets, then choose them as well.

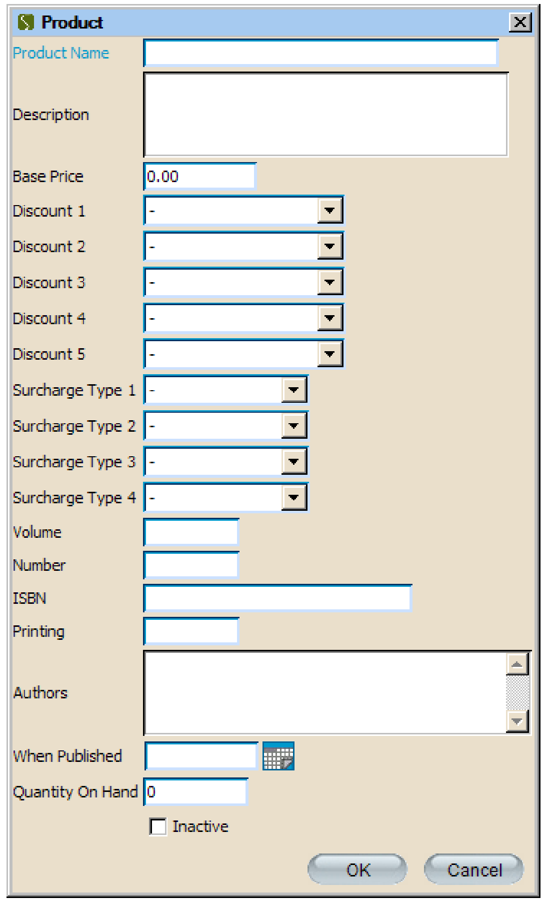
If you want finer control over the pricing of seats, click the Details button. This presents you with a dialog like this:



The above dialog enables you to manually edit the price (base price and, if any were specified, discounted prices) for each seat block in the venue.

Products

Specify the product name and base price. Choose discounts and surcharges that are applicable to the product. If the product is a book or a number of a magazine, then there are additional fields for specifying details about such published materials. The *Inactive* check box lets you specify that this product can no longer be ordered.



Provenance Types

When specifying provenance information for a collection object, this lookup list indicates the type of provenance information. For example: created, ownership change.

Programs

[release note: in a future release of Sumac, the use of COMMUNICATION types to describe a CONTACT's communication preferences will be replaced by Communication Content, Communication Medium, and Program facts]

Your organization may operate different programs for its clients. CONTACT records can hold information about each CONTACT's interests. The program interests are chosen from this lookup list of programs.

If you use Sumac Volunteers, then each TASK can be associated with a program.

Program Themes

Tour Booking programs can be associated with a particular theme, chosen from a drop-down list.

Provinces

See *State (Province)* on page 50.

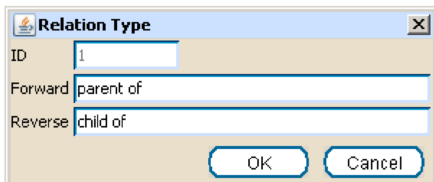
Public Presentation Types

Some Tour Booking workshops are public presentations – perhaps a final presentation of a work that was developed in a series of preceding workshops. You can specify the type of public presentation using this lookup list.

Relation Types

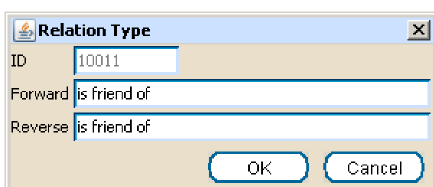
Sumac allows you to relate one contact to any number of other contacts. The relations may be business, e.g. an individual contact is a member of the board of an organization contact. The relations may be personal, e.g. a contact is the spouse or parent of another individual contact.

This lookup list lets you specify the types of relations that you wish to record in your Sumac database. When you click the New button in the list of relation types, this dialog appears:



When you create a new relation type, you must provide descriptive text for the relationship in both directions – forward and reverse. For example, if A is a parent of B (the forward relation), then B is a child of A (the reverse relation). If you are editing information about a contact A, and indicate that contact A is related to contact B in a certain way, then Sumac will know that contact B has the reverse relationship with contact A. This means that you only need to specify the relationship once, and Sumac knows it applies to both contacts (though in the opposite way).

Some relation types may be the same in both directions. In this case, enter the same text in both the Forward and Reverse fields, like this:



Rooms

A location attribute for a collection object can indicate a room.

Schemas

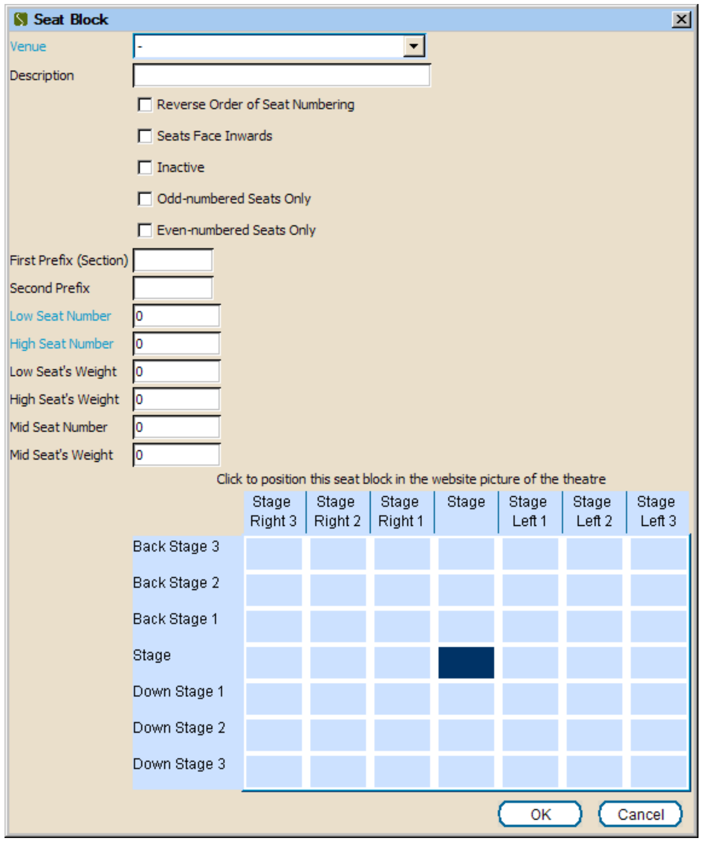
When you create a collection object, it can be classified using a classification scheme or schema. A schema can have up to six levels of description. When you define a schema, you can name the six levels.

Schools

You can specify Education Facts for contacts. This lookup list indicates the list of schools you wish to record.

Seat Blocks

A seat block is a group of seats that are in a venue, typically all having the same ticket price. All the seat blocks that are related to a venue together constitute a seating plan.



Checkboxes

At the top of the window for defining a seat block, there are several checkboxes. Here is what they mean:

Reverse Order of Seat Numbering	Seats are normally presented ascending, from lowest to highest seat numbers, left to right. This check box reverses this presentation.
Seats Face Inwards	If the seat block is being presented on your website, this causes the row of seats to be presented vertically (up a side) rather than horizontally.
Inactive	This checkbox causes the seat block to be displayed dimmed, and sorted to the end of the list of seat blocks.
Odd-numbered Seats Only	This tells Sumac that only odd numbers, between the low and high seat numbers, are to be used.
Even-numbered Seats Only	This tells Sumac that only even numbers, between the low and high seat numbers, are to be used.

Seat Identification

First, choose from the drop-down menu the venue that contains this seat block.

Then indicate the First Prefix and Second Prefix for seats in the block. Prefixes are used to form seat identifiers. Usually you need one (typically a row identifier like A, B, C, etc.). Occasionally you may need two, for example if there is a row A in the pit and also a row A in the balcony, then the first prefix could indicate pit or balcony, and the second could indicate the row.

Next identify the Low Seat Number and High Seat Number in the block.

Seat Weights

When you specify weights for seats, you are indicating how good a seat is. This enables Sumac to identify which seats are better than others.

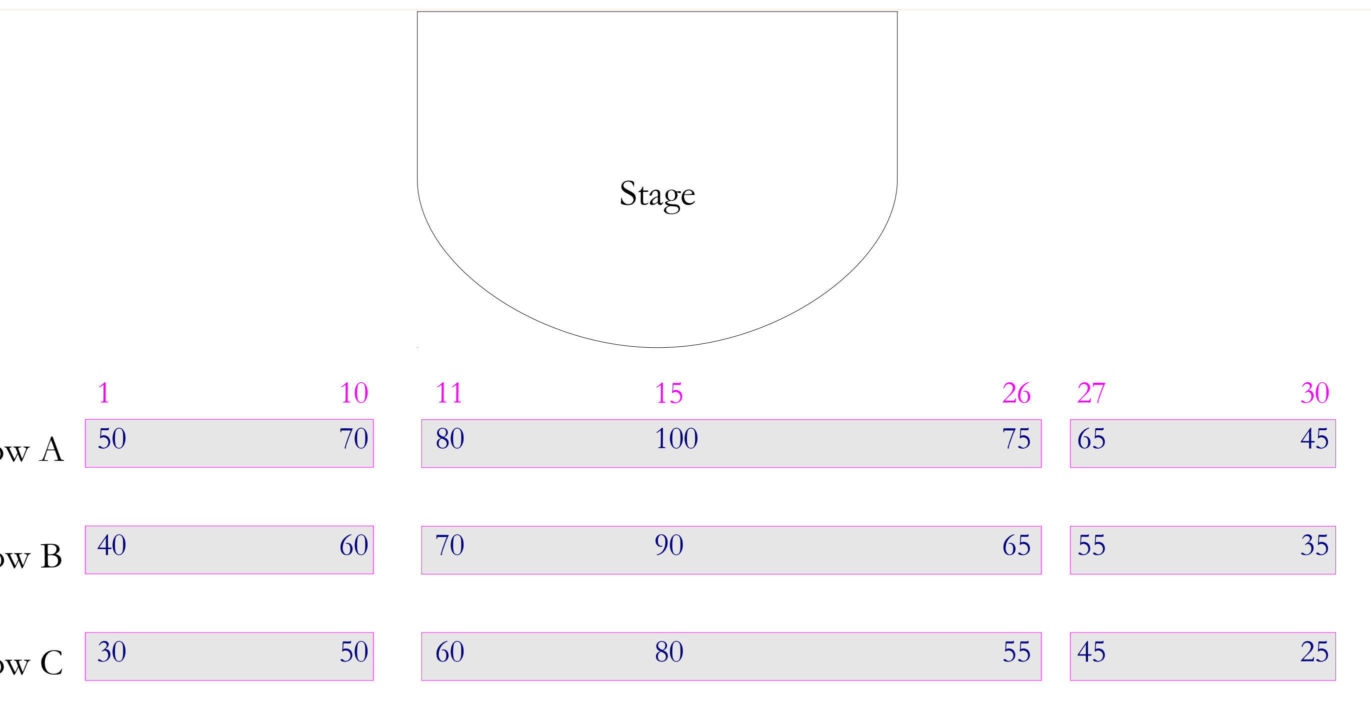
The best seats in the house should have a weight of 100, and all other seats have lower weights.

The seats in a block can be given weights by indicating the weight of the seats on each end of the block. Then Sumac fills in the seats in-between.

If the block is off-centre or for some reason seat weights are not continuous from one end of the block to the other, an additional weight can be specified for a seat in the middle. In this situation you would specify the Mid Seat Number (which seat it is), and its weight – the Mid Seat's Weight.

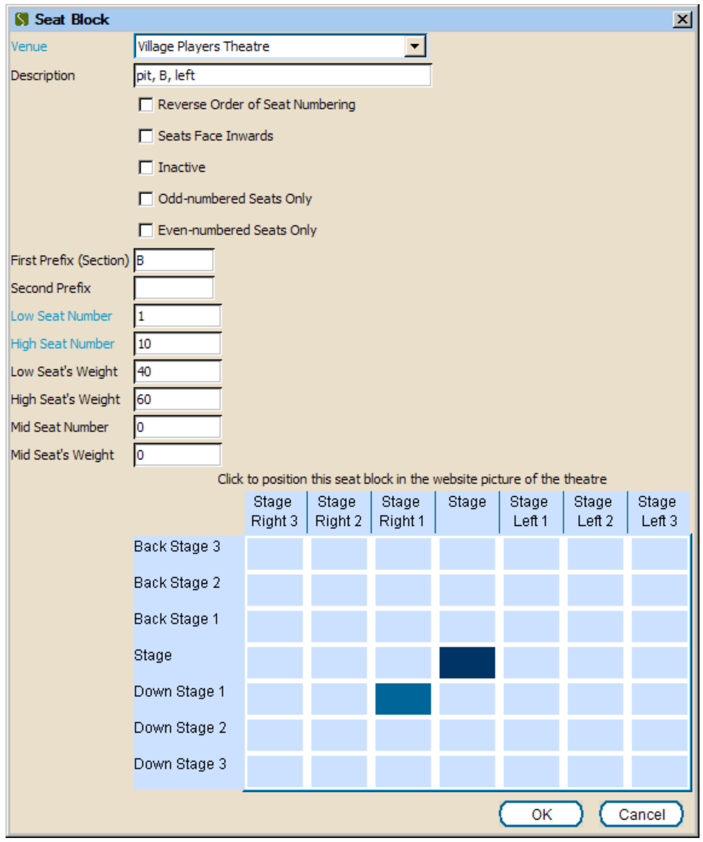
Consider this example:

Assume your theatre has the following seating plan: three rows of 30 seats, numbered from the left, two aisles. There are nine seat blocks. The best seat is seat 15 which is in the middle of each row.

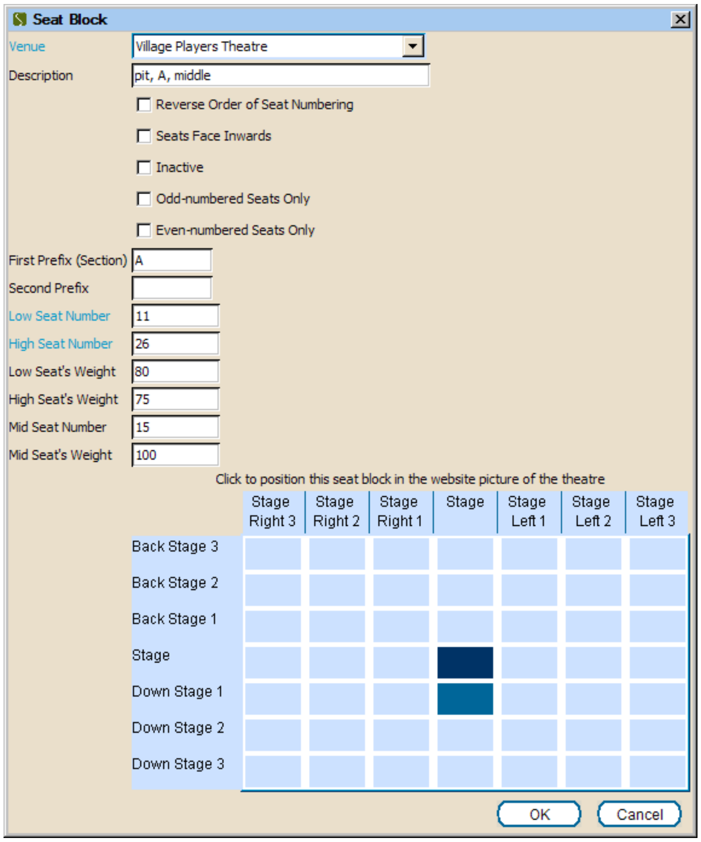


You would start assigning weights by deciding on the weights to be given to the end seats in each block and, if necessary, by a seat mid-way through some blocks. The weights appear inside the blocks in the picture above.

Then enter information for each block. To specify the left block in Row B, enter the following:



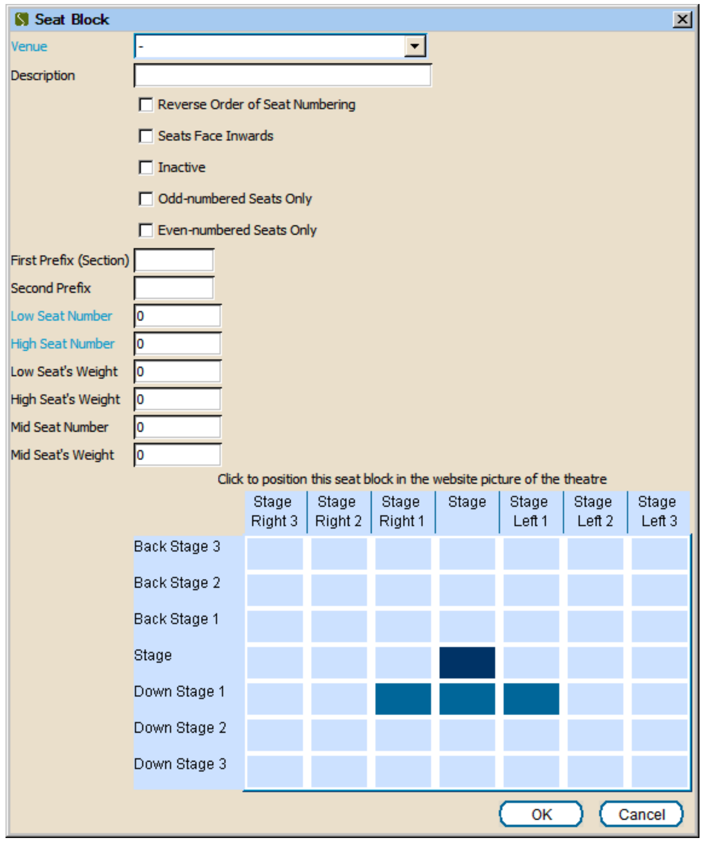
To specify the middle block in the first row, do this:



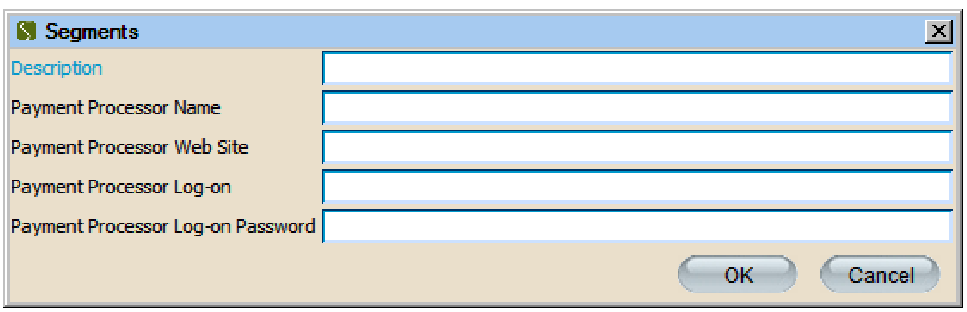
Online Ticketing Considerations

If these seat blocks are going to be displayed online, so that patrons can purchase tickets from your website, you need to specify additional information so that Sumac can draw an appropriate seating plan:

- Reverse Order of Seat Numbering: If Sumac is numbering left to right and numbers should run right to left, click this check box to reverse the numbers.
- Seats Face Inwards: A block of seats will usually be presented horizontally. But if the seat block is rotated (perhaps the seats are balconies on the side of the venue), click this check box to present the seats vertically.
- Seat block positioning: You must specify the position of the seats relative to the stage. Click rectangles in the venue layout picture to indicate where a seat block is. Note that several seat blocks may be in the same position (e.g. directly in front of the stage). Also note that a seat block may be specified as occupying several adjacent positions. For example, a long block of seats positioned in front of the stage with no aisles could be positioned like this:



Segments

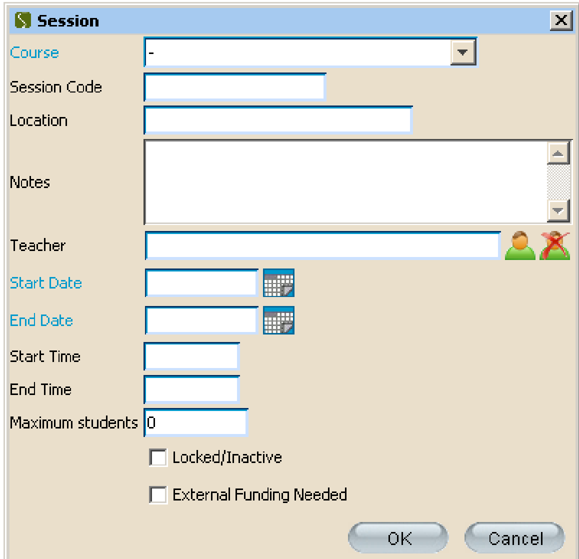


You may wish to segment the contacts in your Sumac database, and give each user the ability to see contacts in only certain segments. This list is where you specify the segments that exist.

> Hint: Once you have defined some segments, each user's profile can indicate which segments of contacts the user is allowed to see.

You can also specify a payment processor merchant account for a segment. When you do this, if Sumac needs to process a credit card, it chooses the merchant account applicable to the segment that the payer is in. If you do not specify a payment processor for a particular segment, and a payment from a contact in that segment is being processed, then Sumac uses the default payment processor specified in the Preferences dialog.

Sessions



Courses can have several sessions. For example, if a course is taught in a facility that allows only 10 students at once, you may have three sessions of the course running in parallel to train up to 30 students.

When a session is marked as locked or inactive, it no longer appears when a user choose a session. The list of available courses and session shows only unlocked sessions.

Shipping Methods

When specifying the location of a collection object, you use this lookup list to indicate the shipping method that takes the object to its location.

Skills

Sumac Volunteers allows you to specify:

- that certain skills are needed to perform a particular TASK
- facts that indicate that volunteer CONTACTS have certain skills which were verified at a particular time.

In both cases, the skills are chosen from this lookup list.

Skill Types

Each skill in the skill lookup list must be of a particular type. This lookup list specifies the available types. When a user chooses a skill, the list of skills is organized as a hierarchy with skill type as the top level, and under each skill type is a list of skills.

Sources

The source is used for marketing purposes to record in each TICKET ORDER how the ticket buyer found out about the event or organization.

This same source list is used to record the source of a COMMUNICATION, particularly useful if the COMMUNICATION records attendance at an event.

Note that there is a separate list of source codes used to record the source of a CONTACT. See *Contact Source* on page 26.

States (Provinces)

States (provinces, counties, parishes) can be entered more quickly into CONTACTS' addresses if they can be chosen from a lookup list. The list can also standardize spelling and abbreviations.

Statuses (for Submission)

This lookup list is used to specify the possible statuses of a SUBMISSION.

Subsidiary Communication Types

Communication types in this lookup list are used to create a list of communication types in each subsidiary database.

Subsidiary Contact Types

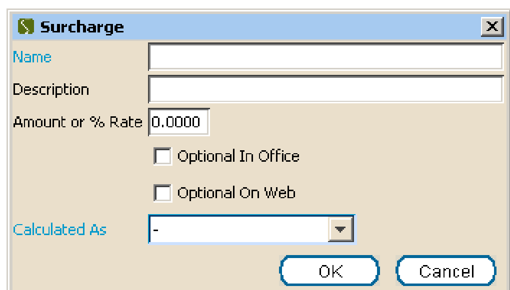
Contact types in this lookup list are used to create a list of contact types in each subsidiary database.

Subsidiary Organization Types

Subsidiaries can be categorized by organization types. The organization types are chosen from this lookup list.

Surcharges (Taxes)

A surcharge is an extra charge added to a TICKET ORDER. Here is the window for entering a surcharge:



Enter the name (e.g. RST) and description (e.g. retail sales tax) of the surcharge. If the surcharge is calculated as a percentage then enter the percentage, if it is a fixed amount then enter the fixed amount.

Indicate if the surcharge is optional. One that is optional (e.g. expedited shipping charge) can be added to an order manually. A surcharge that is not optional is added automatically to an order. Note that you can indicate if the surcharge is optional for orders placed using Sumac directly (in your office) and separately specify whether the surcharge is optional for order placed through your website.

Finally indicate how the tax is calculated. If you have licensed Sumac Ticketing, there are three choices:

- Fixed Amount Per Order: the amount is a fixed currency amount that is added to each order.
- Fixed Amount Per Ticket: the amount is a fixed currency amount that is added to each ticket.
- Percentage: the charge added to the order will be calculated as the specified amount multiplied by the value of the tickets in the order.

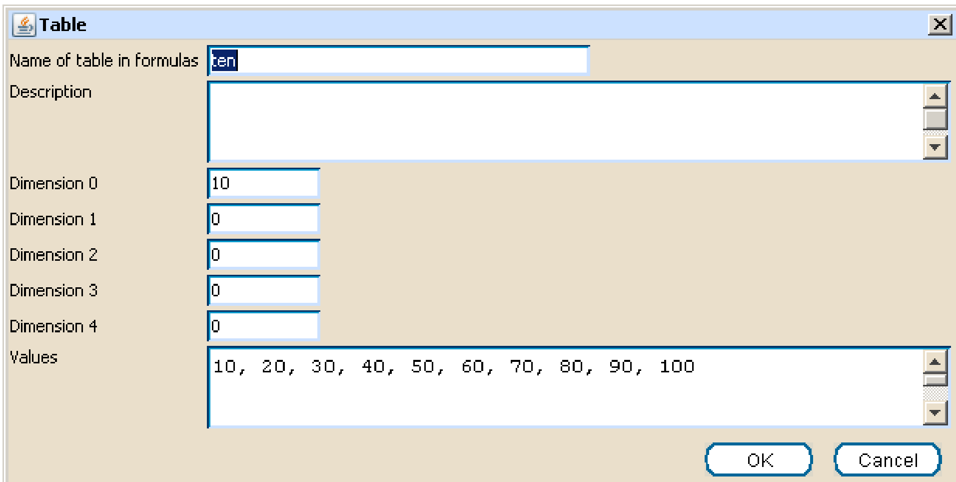
If you have *not* licensed Sumac Ticketing, there are two choices:

- Fixed Amount: the amount is a fixed currency amount that is added to each payment.
- Percentage: the charge added to the order will be calculated as the specified value multiplied by the value of the payment.

Tables

Tables enable the more sophisticated calculations sometimes required to make planned gift proposals.

When you enter a new table, you must specify its dimensions and the values of the entries in the table. Here is a one-dimensional table with ten entries:



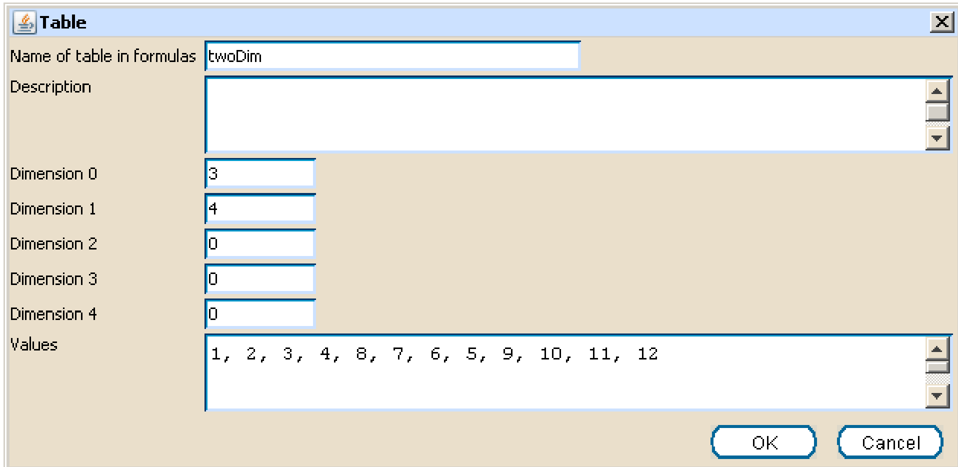
Notice that its first and only dimension is 10. The entries are specified in order (recall that subscripts used for entries in table start at zero):

```
ten[0]      10
ten[1]      20
ten[2]      30
ten[3]      40
ten[4]      50
ten[5]      60
ten[6]      70
ten[7]      80
ten[8]      90
ten[9]      100
```

Here is a two-dimensional table with three rows and four columns:

```
1     2     3     4
8     7     6     5
9     10    11    12
```

It would be put into Sumac as follows:



Notice that the entries are put into the Values field in the order the makes the last subscript vary fastest:

```
twoDim[0,0]      1
twoDim[0,1]      2
twoDim[0,2]      3
twoDim[0,3]      4
twoDim[1,0]      8
twoDim[1,1]      7
twoDim[1,2]      6
twoDim[1,3]      5
twoDim[2,0]      9
twoDim[2,1]      10
twoDim[2,2]      11
twoDim[2,3]      12
```

If you have a three dimensional table, the Values field would be filled similarly, with entries put in the order that makes their last dimensions vary fastest:

```
xxx[0,0,0]
xxx[0,0,1]
xxx[0,0,2]
  …
xxx[0,1,0]
xxx[0,1,1]
xxx[0,1,2]
  …
xxx[0,2,0]
xxx[0,2,1]
xxx[0,2,2]
  …
xxx[1,0,0]
xxx[1,0,1]
xxx[1,0,2]
```

Hint: The number of entries in the Values field must be equal to the product of all the dimensions that you specify.

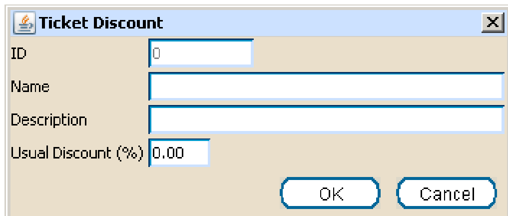
Task Types

Sumac Volunteers allows you to define TASKS that need to be performed. Each TASK can be of one of the TASK types defined in this list.

Sumac Volunteers also allows you to enter facts about each CONTACT that indicate which types of TASKS the CONTACT likes to perform. This enables Sumac to show you the ideal CONTACT to perform a particular TASK.

Ticket Discounts

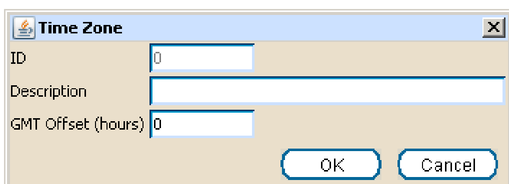
Specify the name (e.g. children), description (e.g. under 13), and the typical discount that is applied (e.g. 25%). Note that in a particular price scheme (see *Price Scheme* on page 42), the calculated discounted ticket prices can be over-ridden.



Time Zones

Sumac allows you to record the time zone in which a CONTACT resides and the time zone where your own offices are located. This helps when phoning since you can determine the correct time at the place that you are phoning.

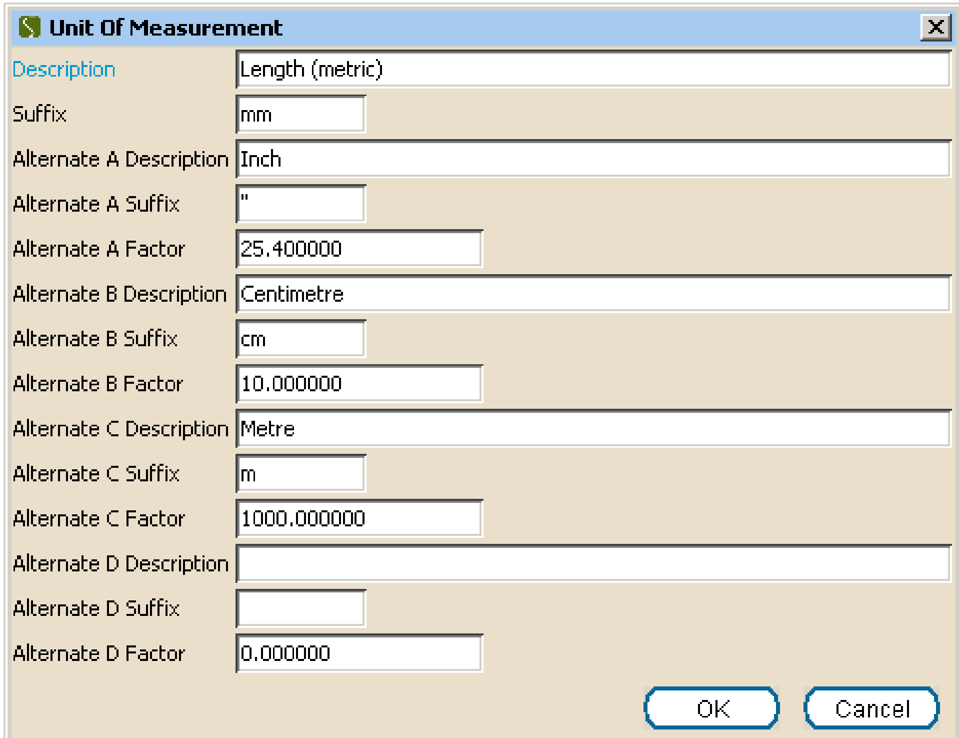
This lookup list of time zones lets you identify the name of the time zone and also its time offset relative to Greenwich Mean Time (GMT).



Units of Measurement

When entering a numerical attribute for a collection object, you specify its numerical value. You also indicate the units of measurement.

Sumac lets you enter measurements in any units, and converts them to a standardized internal unit. Here is an example:



The above defines lengths that will be represented internally in millimetres. The suffix for this standard representation is mm.

This definition also allows a user to enter lengths in three alternate units: inches (alternate A), centimetres (alternate B), or metres (alternate C). Note that for each alternate, you indicate the name of the alternate unit (e.g. Inch), the conversion factor that changes the alternate unit to the standard one (e.g. 25.4 times inches gives millimetres), and a suffix that indicates the user is entering the data in an alternate units (e.g. for inches, the suffix is ").

With the above unit of measurement, if a user enters 2", Sumac will convert it to 50.8 mm.

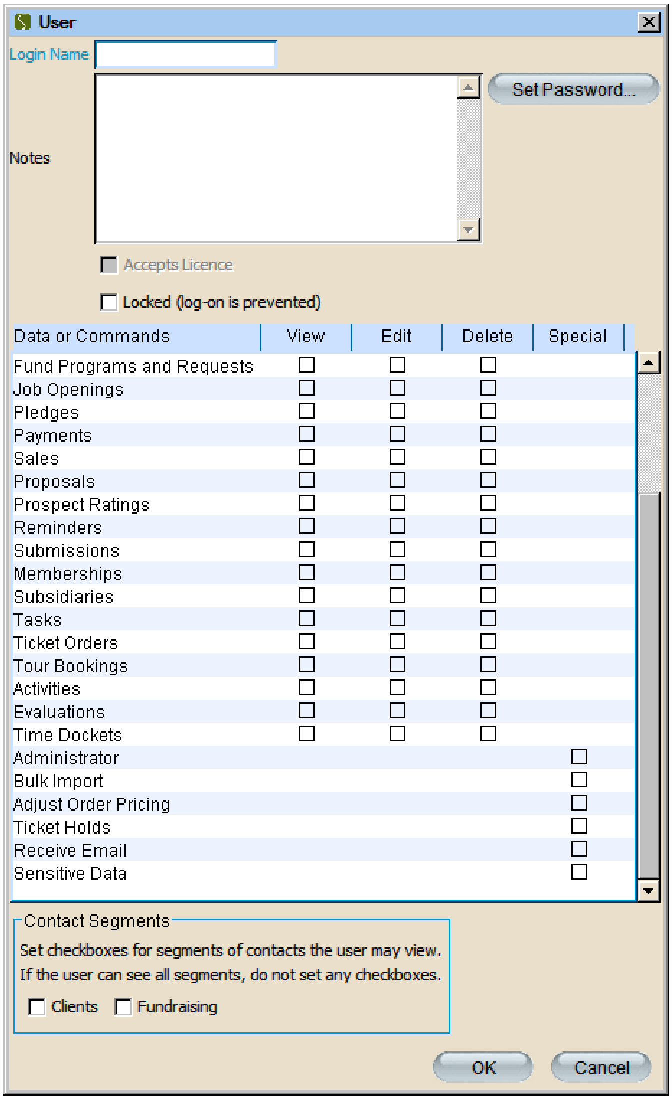
Unsold Dispositions

When an auction lot is being defined, you can specify what should be done with it when if it is not sold. Typical dispositions include: sell at any price, and return to donor.

Users

Each person who logs on and uses Sumac must be defined by an entry in the Users lookup list. Sumac keeps track of each user's log-on ID and password. The dialog for entering a user has a button that can suggest secure passwords.

Most importantly, Sumac keeps track of what Sumac operations each user is allowed to perform. To ensure the security and integrity of your data, you should limit what each user is allowed to do within Sumac to just the required operations. You do this by setting check boxes that indicate the different Sumac operations that each user is allowed to do. This picture shows what capabilities are available:



Here is what each capability means:

View	From the Sumac console, the user can click to see the list of items, and double click to view individual items. But the user cannot change or delete data.
Edit	The user has all the abilities of the View check box, and in addition is allowed to edit individual items.
Delete	The user has all the abilities of the Edit check box, and in addition is allowed to delete items from the list.

Administrator	If a user is given the Administrator capability, here is what that user can do that other users cannot: ◆ use the Administrator drop-down menu in the Sumac Console ◆ generate the Sumac Configuration report ◆ save Search Builder searches as groups in the database ◆ delete template usage information. The Administrator capability also allows these extra capabilities in optional Sumac modules: ◆ view REMINDERS other than his or her own and change a REMINDER to be for a different user ◆ create new task templates for use in the TASKS list
Bulk Import	The user is allowed to use the Import command from the Utilities menu in the Sumac Console. This capability also enables a user to use the Set Values buttons in the COMMUNICATIONS list, CONTACTS list, and DONATIONS list.
Adjust Ticket Payments	This gives a user the ability to make adjustments to ticket order payment amounts.
Ticket Holds	This gives a user the ability to specify that certain seats in a venue for a specific performance are being held, i.e. are not available to be sold.
Receive Email	This enables a user to use the Receive Email command in the Utilities menu.
Sensitive Data	This gives the user the ability to indicate that certain contact and communication records are sensitive and to view information that has been marked as sensitive.

Segments

If your database has different groups of contacts, each of which should be visible only to selected users, then use the Lookup Lists command to define the segments.

Then each user profile must specify which contacts a user is allowed to see. If a user is allowed to see all segments of contacts, then you should not choose any segments – Sumac assume that this means the user can see all contacts.

Payments

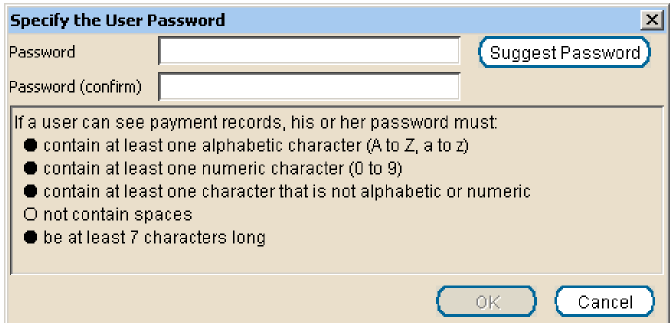
A user who is allowed to do anything with PAYMENTS must be given a more secure password: at least seven characters long and containing alphabetic, numeric, and special characters. Sumac checks to ensure that the password is sufficiently secure.

Communications, Mail Merge, and Labels/Envelopes

Use of the Mail Merge and Labels/Envelopes buttons can cause COMMUNICATION records to be created. Therefore, these buttons are only enabled for users who have the ability to Edit COMMUNICATIONS.

Set Password Button

When you click the Set Password button, this dialog appears:

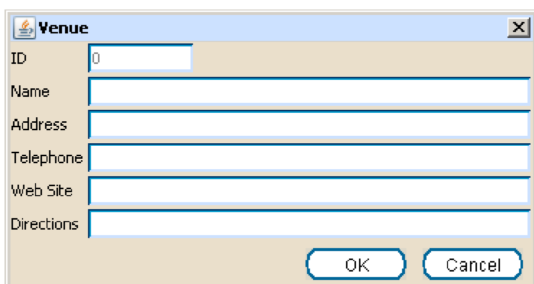


The OK button is enabled when both text fields contain the same password.

The text field shows whether the password is strong enough that it can protect payment information. The circles indicate characteristics of the password that is being typed into the first password field. A filled (black) circle indicates the characteristic is required, an empty circle indicates the the password has been satisfied. You do not have to use passwords that are high quality, but a user without a high quality password is not allowed to see payment information.

Venues

A venue is where an event can occur. Specify the name and location of the space, e.g. a theatre, hotel ballroom. This information can be displayed by the user taking TICKET ORDERS, and is also printed on TICKET ORDERS.



Volunteer Types

If you use Sumac Volunteers, then this list allows you to specify the types of volunteers that are in your organization. These volunteer types appear as check boxes in contact records, so a volunteer CONTACT can have more than one volunteer type.

Reports allow you to list volunteers by volunteer type.

Inactive Data

Sometimes data needs to be kept for reference purposes, but you want to make sure that it is no longer used. Such a data element can be marked as inactive, telling Sumac that it should prevent users from creating new references to that data element.

Data Element	*Impact of Making it Inactive*
campaigns	◆ appear grey in CAMPAIGNS list ◆ do not appear in dialog for selection
contacts	◆ appear grey in CONTACTS list ◆ cannot be chosen as a contact for any other types of records ◆ can be edited only by an administrator user
discounts	◆ do not appear in drop-down menus for selection
events	◆ do not appear in drop-down menus for selection ◆ inactive events do not appear in the DONATIONS list and COMMUNICATIONS list searching panels and cannot be specified when creating new DONATIONS and COMMUNICATIONS

Security

Overview

The Sumac Administrator is responsible for keeping the data secure.

Database Passwords

Sumac connects to multi-user (MySQL) databases using a standard user ID and password. You can enhance security by removing this user ID from your database and replacing it with your own.

If you do this, you must tell Sumac the database user ID and password to use. This is done by adding additional fields to the database connection information in the databases.txt file. For an explanation of the contents of the databases.txt file, see *Setting Up Additional Databases* on page 9.

If your database server uses non-standard user accounts, you can append two additional fields, also separated by spaces, to each line in the databases.txt file: the database connection user ID, and the database connection password. In this case, the line may look like this (where dbUID is the database user ID and dbPwd is the database password):

```
jdbc:mysql://localhost/sumac com.mysql.jdbc.Driver dbUID dbPwd
```

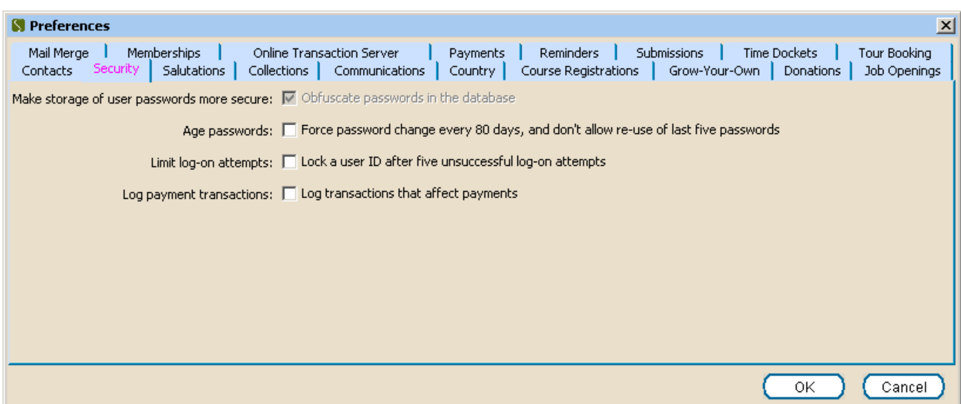
User Profiles

For each user of the Sumac database, you must define a Sumac user account. A user account specifies the user's log-on name, password, and capabilities. See *Users* on page 56.

You should only give each user the minimum set of capabilities required by that user to do his or her job.

Passwords and Logging

Sumac can help you enforce a good password management policy. If you choose the Preferences command from the Administrator menu, then click the Security tab, this is what you see.



The first three check boxes that help you manage passwords more securely:

Check box	*What it does*
Obfuscate passwords in the database	Passwords stored in the user information table in the database are stored in clear (readable) text. If you obfuscate them, then they are converted to an unreadable format. For example if the user's password is the single character *r*, it will be converted to this: 6a9997023a65253995105d37bf8f950a39d5e75667f1b8e0a65bf12f2ddf06c2 The conversion uses a hash algorithm – a mathematical calculation that cannot be reversed. So even if someone sees the obfuscated password, he will not be able to determine what the password is.
Force password change every 80 days, and don't allow re-use of last five passwords	This check box imposes two policies: ◆ passwords must be changed at least every 80 days ◆ when changed, the new password cannot be one of the last five that have been used.
Lock a user ID after five unsuccessful log-on attempts	If a user tries to log on five times, typing an incorrect password each time, then the user ID is locked until an administrator unlocks it.

The *Log transactions that affect payments* checkbox causes Sumac to record whenever a user adds, deletes, processes, or changes a payment record. It also records whenever a user logs on and logs off the Sumac database. This log can be used to audit and trouble-shoot payment security issues.

Payments Considerations

If a user is allowed to see payment information, his or her password must satisfy certain extra security requirements. This is automatically enforced by Sumac, and you cannot change this policy.

In addition, in order to comply with payment security standards, you must implement all the policies described above, in particular

- specify database connection user IDs that are different from the default ones
- create new user profiles other than the default one which comes with each database, and
- user all three check boxes for enhanced password security.

Other Sumac Administrator Roles

Send Database

It is possible that you will need to send your entire Sumac database to someone, perhaps for mass data imports and cleansing, or perhaps for trouble-shooting of a problem that is hard to explain over the phone or using email.

Here are the steps to follow:

- ✔ Ensure everyone has logged off Sumac, and is no longer using the database server.
- ✔ On the server computer, stop the database manager service. In a command window, enter “net stop mysql”.
- ✔ The server data files are now available. If you have a standard MySQL installation, here is what to do:
  - Put the entire contents of the folder C:\mysql\data into a zip archive. If you have Winzip, you can probably do this by right-clicking the icon and then choosing the appropriate zip menu command. This is the file that you need to send to someone.
- ✔ Restart the server. If you have a standard MySQL installation, here is what to do: In a command window, enter “net start mysql”.

Back Up Sumac Data

All the data that is entered and manipulated using Sumac is stored in a database. The creation of this database takes a lot of work, which translates into time and money. Losing this data would be a *major loss* to your organization.

To prevent this loss, ensure that you regularly back up all the Sumac data.

Surrent information and recommendations about backing up your Sumac data can be obtained at http://www.sumac.com/help/backup.htm

Configuration Report

A special report is available to assist a Sumac administrator. It is accessed, like most reports, from the Reports button in the Sumac Console. It is named *Sumac – database configuration*. This report shows the contents of lookup lists and how many references there are to each entry in each lookup list. This enables the Sumac administrator to see which entries are useful and which should be considered for deletion.

Periodic Data Cleansing

As people enter and edit and import data in Sumac, they may accidentally enter incomplete information. It is often worth a quick check to see if significant data is missing.

Examine Contact Addresses

Show all CONTACTS in the CONTACTS list.

Use Fields To Show to show all the residence address fields. Click to sort columns and see which fields are missing. Ensure that required data is not omitted.

Perform a similar check on business address fields instead of residence address fields.

Check Salutation and Recipient Fields

If prefixes or first names are missing, salutation and recipient fields may contain inappropriate results. Use Fields To Show to show prefixes, first names, virtual salutations and virtual recipient fields. Examine to make sure that missing data is not going to cause a problem, and if missing data (e.g. no first name) is a problem, then manually enter values into the salutation and recipient fields

Consistency of Gender and Addresses

If a contact record has no first name and a Business name in the last name field, then the record should have gender Organization, and should have its Use business address check box checked. Use Fields To Show to show all these columns and check for consistency.

Correct Address Information Being Used

Use Fields To Show to show Pref Street A to make sure that every contact has street address information and that the Use business address check box is checked or unchecked as appropriate.

Relationships to an Organization

Using Fields to Show, display First Name, Last Name, and Business Organization. Sort by Business Organization. You can see all the CONTACTS that belong to the same organization. It is often convenient to set up a relationship between the organization CONTACT record and each individual's CONTACT record.

Remove Duplicate Contacts

Sort on Last Name (click on last name heading). Scan for duplicate records. Highlight two duplicates, click the Duplicates button. Click on the fields in the second and third column in order to choose what the result record (fourth column) will look like. Once the fourth column looks correct, click OK.

Set up Households

Sort on last name. Scan for contacts that should be a household. Click the household button. Follow the prompts to create a new household record.

Appendix A – Suggested Values For Lookup Lists

Here is a summary of the lookup lists applicable to each major type of data stored in Sumac, and some possible values to be used for each list.

> Hint: Do not put entries into lookup lists unless you are sure that they will be used. It is easy to add a new entry later, if it turns out to be necessary. But having unused or marginally useful values in a lookup list slows down data entry and confuses users.

Lookup List	*Suggested Values*
Accounts	*Each donation can be entered against a particular general ledger account. Refer to your organization's chart of accounts to find out which accounts are appropriate for donations, and enter them into this list. Make sure that the description of the account will enable people entering donations to choose correctly.*
Action Plans	*Enter sequences of reminders to be triggered by specific events in your organization. For example, receipt of a large donation may trigger a series of actions to show appreciation and encourage an ongoing donor relationship.*
Action Type	email letter lunch phone
Club Types	4H Kinsman Rotary Scouting Shriners
Communication Types	*Note that some are inbound and some are outbound. Note, also, that some identify media while others identify specific documents. Some organizations produce several special interest newsletters, each of which could be added to this list.* *Outbound communications:* Annual Report Direct Mail Email Fax Newsletter Phone Quarterly Report Upcoming Event Notice *Inbound communications:* in-mail in-phone in-email in-attendance

Lookup List	*Suggested Values*
Contact Sources	*See the Source lookup list below. These suggested values are generic types of sources for contacts. The Contact Sources lookup list can also be used to identify individuals if all the contacts were sourced by two or three named individuals. It may also be appropriate to be more specific than these listed entries (e.g. Telethon-Spring and Telethon-Autumn).* Advertising Canvassing Direct Mail Event Attendance List Exchange Recruitment Telethon Word of Mouth
Contact Types (1)	*This list can quickly become very long. Don't clutter up the list with entries that you cannot use. Insert only entries that (a) you will be able to enter for each contact, and (b) you will be able to use in your fund-raising and communication activities. Here are suggested contact types for a regular database of contacts.* Affiliate Alumni Board member Community Consultant Contract employee Corporate foundation Corporate sponsor Employee Past Employee Foundation Government Government Funder Media Past Board Member Patron Politician Subscriber Supplier Umbrella group VIP Volunteer

Lookup List	*Suggested Values*
Contact Types (2)	*Here are suggested contact types for a media database.* Magazine - Electronic Magazine - Paper Newspaper - Daily Newspaper - Weekly Newspaper - Monthly PSAs - Radio PSAs - Television PSAs - Print Radio Television Website
Delivery Methods	FedEx Post UPS
Departments	*Departments provide a breakdown of tasks by organizational unit. This can be used in conjunction with Programs, to provide more accurate classification of tasks.*
Disciplines	*This list of values is appropriate for a theatre company.* Actor Actor - Emerging Assistant Director Choreographer Composer Costume designer Dancer Dramaturge Guest Artist Lighting Designer Musician Playwright Props Set Designer Sound Designer Stage Manager

Lookup List	*Suggested Values*
Donation Types	Bequest Corporate Endowment Foundation Government In-kind Individual Member Gift Memorial Gift Subscription Gift *If your organization uses Sumac Membership, you should have a Donation Type that indicates the Donation was received as part of a membership renewal:* Membership Renewal
Events	*List the events for which you will be receiving pledges or donations, or selling tickets.*
Event Types	AGM Barbecue Bowling Cultivation Dinner Donor Appreciation Fundraiser Golf Performance Press Conference Opening Reading Soirée Sports Event Volunteer Appreciation
Extra Fields	*If the standard fields of information about contacts do not provide an appropriate place for some type of information that your organization needs to track, then define an extra field for that information.*
Festivals	*If your organization solicits submissions for particular festivals, then put the list of festivals here. Note, also, that this lookup list can be renamed to some other attribute of a submission that is more appropriate to your organization.*
Funds	Awareness Program Building Fund Capital Endowment Fund General Operations Outreach Program Summer Camp Program Fund

Lookup List	*Suggested Values*
Funder Types	Corporate Government Private Foundation
Fund Request Statuses	Approved Submission Acknowledged Submitted Under Review
Languages	English French German Spanish
Mandatory Fields	*Always ensure that Last Name is mandatory for contacts. Other fields to consider making mandatory include: Postal Code, Phone Number, Email Address.*
Media	*This list of values might be appropriate for a theatre company.* Cabaret Class/Workshop Clown Dance Film/Video Installation - Performance Installation - Visual Art Music Other Performance Play - Long Play - Short
Membership Benefits	*The benefits appropriate to members of your organization.*
Membership Types	Adult Organization Senior Student
Offices	*Create a record for each office of your organization. The details in the office records can be used in document templates. Some information in office records is used to send emails to contacts.*

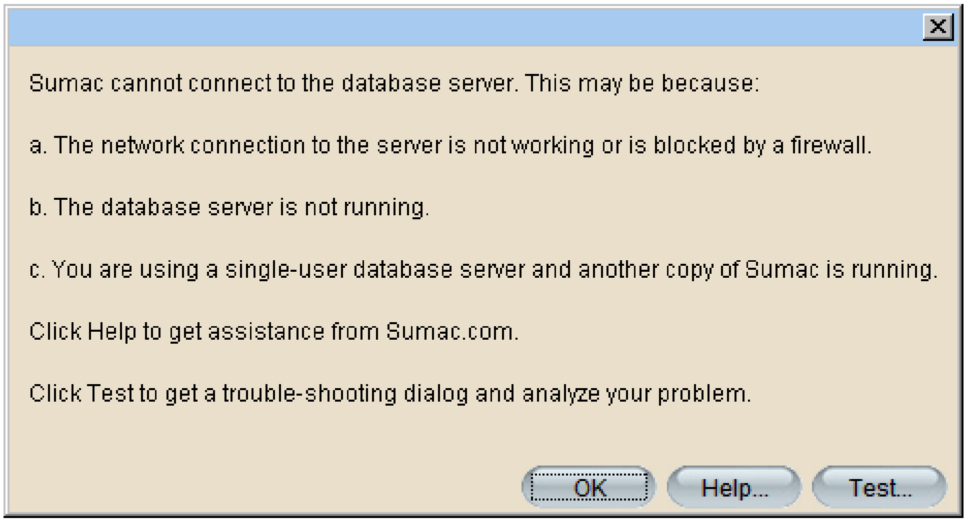
Lookup List	*Suggested Values*
Payment Types	American Express Bank Transfer Cash Cheque Credit Card Debit Diners Club MasterCard Money Order VISA *If your organization uses Sumac Membership, you should have a Payment Type that indicates a payment was received as part of a membership renewal:* Membership Renewal
Programs	*Programs provide a breakdown of tasks. This can be used in conjunction with Departments, to provide more accurate classification of tasks.*
Relation Types	board member of – has director contact of – contacted by co-worker of employer of – works for friend of member of – has member parent of – child of spouse of
Skills	*This list identifies the specific skills that are required by a Task. It also identifies the specific skills that a particular contact possesses.*
Skill Types	Administrative Client Service Event Management
Sources	*See the Contact Source lookup list above.* Advertising Direct Mail Word of Mouth
Statuses (for Submissions)	Accepted Received Rejected Under Review
Surcharges (Taxes)	Courier GST PST Shipping
Submission Statuses	accepted received rejected under review

Lookup List	*Suggested Values*
Task Types	*This list indicates the type of a Task. It also identifies the types of tasks that a particular contact is interested in performing.*
Time Zones	*Here are common North American time zones:* *Time Zone* — *GMT Offset* — *Cities In This Zone* Atlantic — -4 — Halifax Eastern — -5 — Boston, New York, Toronto Central — -6 — Chicago, Mexico City, Saskatoon Mountain — -7 — Calgary, Denver Pacific — -8 — Los Angeles, Vancouver Alaska — -9 — Anchorage Hawaii — -10 — Honolulu
Volunteer Types	Administration Program

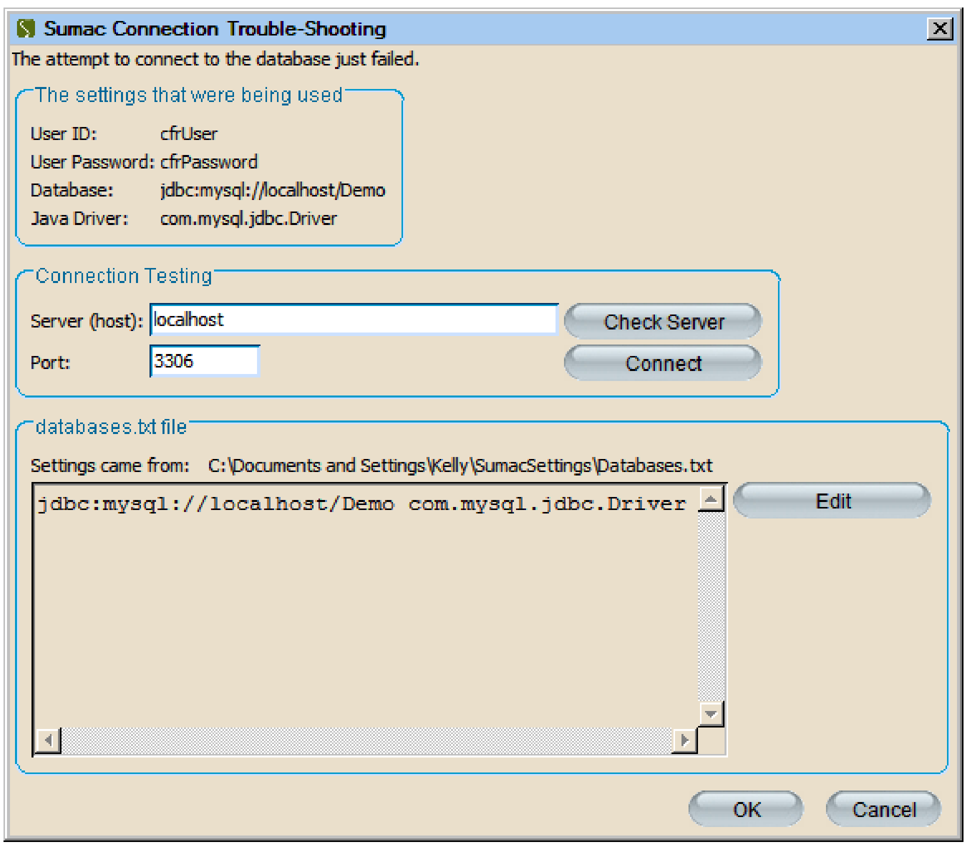
Appendix B – Unable to log on

Cannot Connect To Database

Sometimes when a user tries to log on, this message appears:



You may immediately know what is wrong, but if you don't, click the Test button to get this dialog:



Click the *Check Server* button to confirm that Sumac is able to identify the host (the computer that holds the database) and find it on the network.

Click *Connect* to confirm that Sumac is able to connect to the Sumac database.

If you need to alter the databases.txt file, click the *Edit* button. Sumac will run your default text editor and open databases.txt.

Here is a checklist of things that may prevent a Sumac client from connecting to the server:

On both computers

- Make sure there is network connectivity and that both computers have a correctly assigned IP address in the same domain. You can do this by running a Windows command window and entering an *ipconfig* command or, if the computer has been reconfigured lately, *ipconfig /renew*.

On the Client Computer

- Make sure the *databases.txt* file is in the right place. It must be in a directory named SumacSettings, which is in the user's home directory.
- Check the *databases.txt* file to ensure that it points to the correct server and correct database. Sometimes server names are case sensitive, so be very accurate in typing in the server name.
- Ensure that the user ID with which you logged on to Windows has sufficient privileges to:
  - connect to a networked database server
  - access the version of Java installed on the computer
  - access the *databases.txt* file in the *SumacSettings* directory in the user's home directory.

On the Server Computer

- Make sure that the database server is up and running.
- Ensure that server's firewall is not blocking connections to the MySQL server application (usually *mysqld-nt.exe*). Configure your firewall to allows access to the server program (*mysqld-nt.exe* on Windows).
- Ensure that the server (if Windows) has file sharing turned on. You can use the Network Setup Wizard control panel to turn on file sharing.
- Ensure that the database allows acces (using a *grant permissions* command) to the Sumac user account to use the database. If there is some chance that this was not done (e.g. a newly recovered or installed MySQL server), then run the appropriate commands – typically two lines something like this

```
GRANT ALL PRIVILEGES ON databaseName.* TO 'xxx'@'localhost'
        IDENTIFIED BY 'yyy' WITH GRANT OPTION;
GRANT ALL PRIVILEGES ON databaseName.* TO 'xxx'@'%'
        IDENTIFIED BY 'yyy' WITH GRANT OPTION;
```

  where *xxx* is the user ID and *yyy* is the user password being used by Sumac to access the database.

MySQL Connection Debugging

When Sumac starts up with a console window and debugging turned on, the following error conditions cause the corresponding messages to appear in the console window.

MySQL Not Running on the Server

This line appears:

```
logon SQLException: Communications link failure due to underlying exception:
```

followed by a few dozen lines of additional information.

User ID Not Identified By Server

This line appears (where xxxx is the bad user ID):

> logon SQLException: Access denied for user: 'xxxx@192.168.2.13' (Using password: YES)

sometimes followed by some lines of additional information.

Appendix C – Install MySQL

General Warnings

- All operations described in this document need to be performed on the MySQL server computer.
- Before you begin, ensure there is not already a version of MySQL installed. If there is a version already installed, it may be used by some other program that is dependent on that particular version of MySQL. You must coordinate the install with the customer's server manager.
- If your server is running Microsoft Windows Vista, then you must disable User Access Control (UAC) before installing MySQL.
- Make sure you have logged on to the server computer as a user with administrator privileges.

Steps to Upgrade MySQL 4.0.18-nt to 5.0.45

If an old version of Sumac has been installed, then it may be running MySQL 4.0.18. You need to copy the data from that installation, uninstall the old MySQL, then install the new MySQL.

Here are the steps to uninstall an old MySQL:

Uninstall OLD MySQL

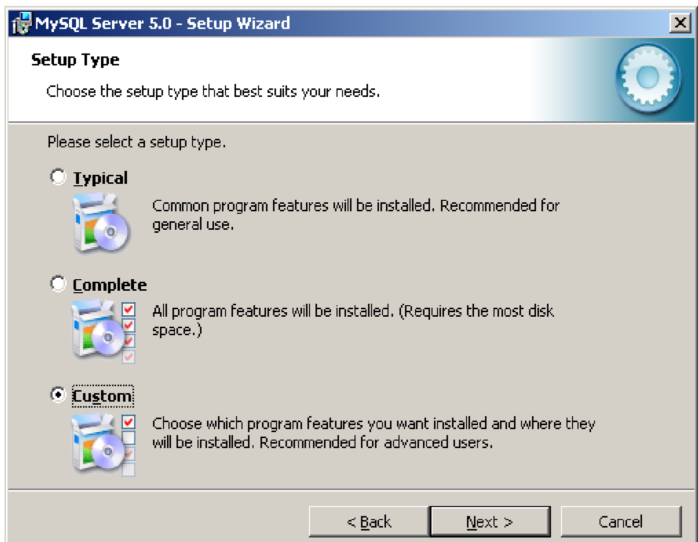
- ✔ Stop the MySQL service: Traffic Light/WinNT/Stop the Service
- ✔ Back up Folder C:\MySQL\Data. Usually the easiest thing to do is to just copy it on the desktop.
- ✔ Remove the service: Traffic light/WinNT/Remove the Service. If the Remove the Service command is not available, then skip this step.
- ✔ Shut down the tool: Traffic light/WinNT/ShutDown this Tool.
- ✔ Uninstall MySQL 4.0.18: use Add or Remove Programs in the Control Panel.
- ✔ Delete the MySQL Directory. Make doubly sure that the data folder is backed up since it will be deleted.
- ✔ Reboot the computer.

Install MySQL 5.0.45

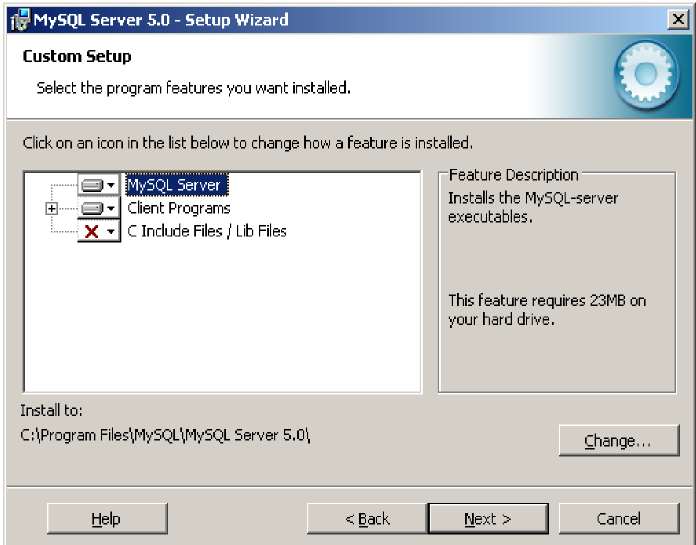
- ✔ Copy the supplied file (mysql-essential-5.0.45-win32.msi) to the desktop of the server computer, then double click to run it.

✔ Click Next:

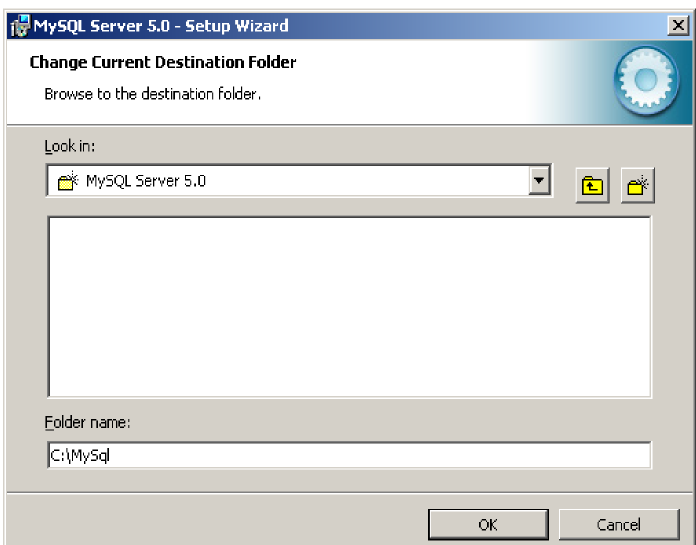
✔ Choose Custom, Click Next



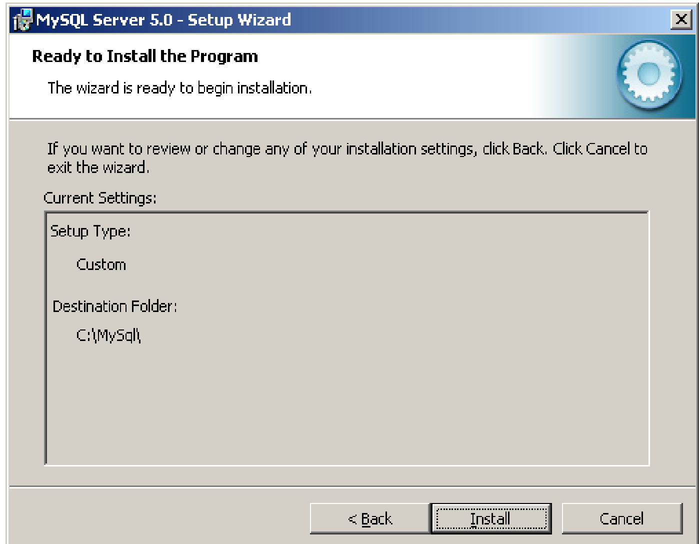
✔ Click Change…



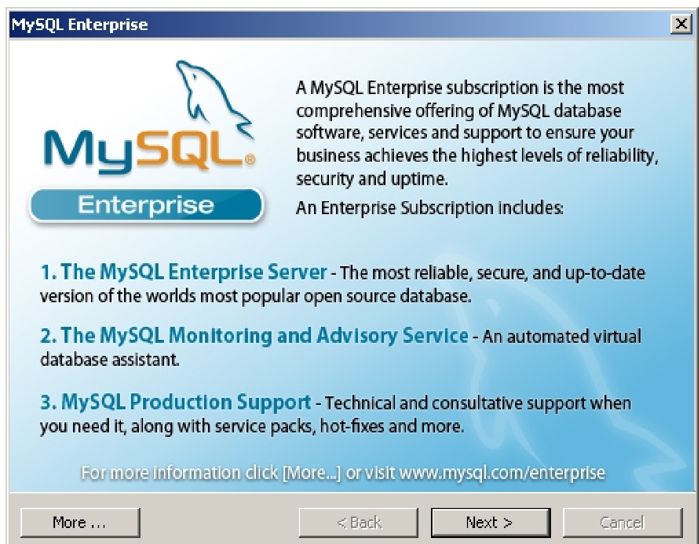
✔ Change the folder name from c:\Program Files\MySQL\MySQL Server 5.0\ to C:\MySQL as shown below, then click OK.



✔ Click Next, then click Install.

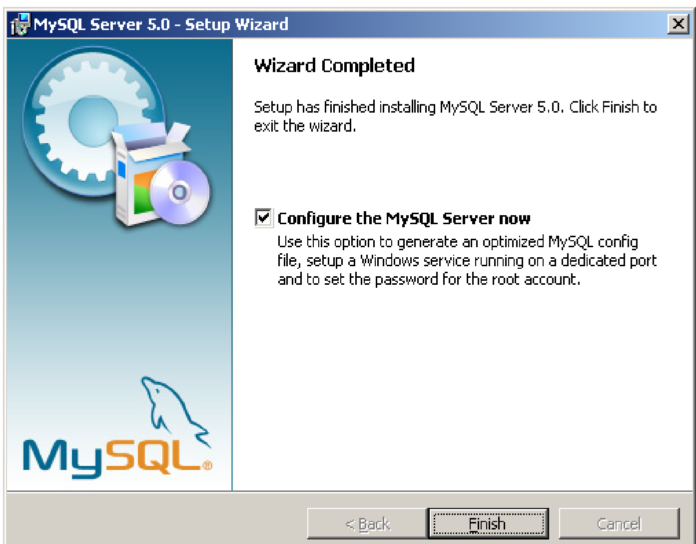


✔ When the following window appears, click Next

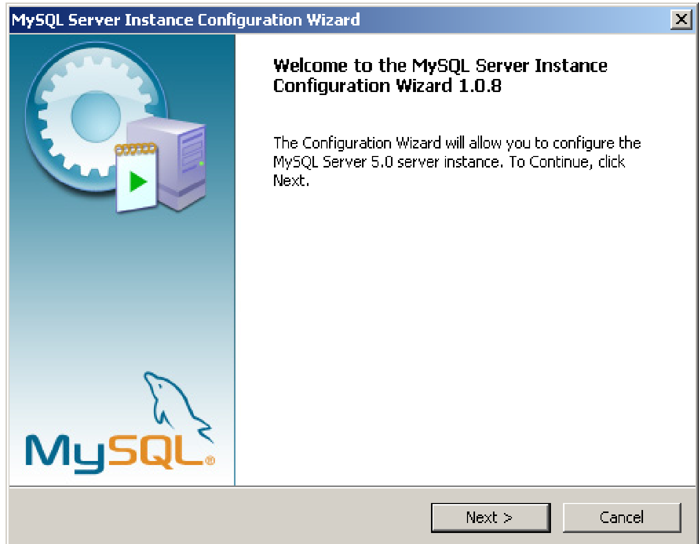


✔ Click Next

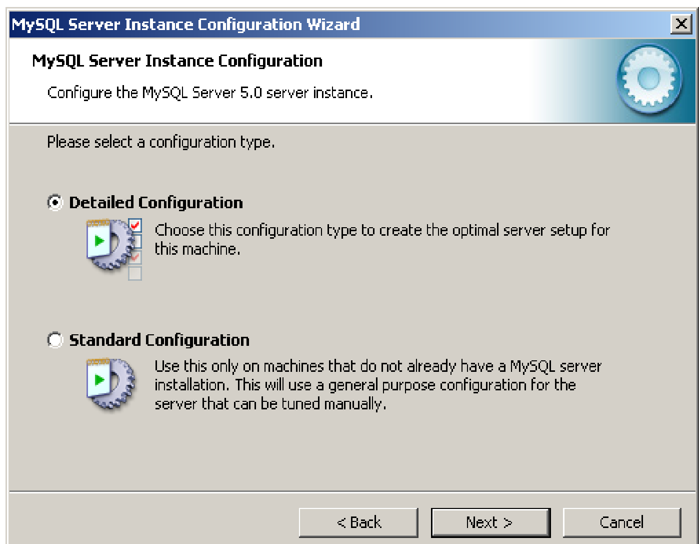
✔ Click Finish



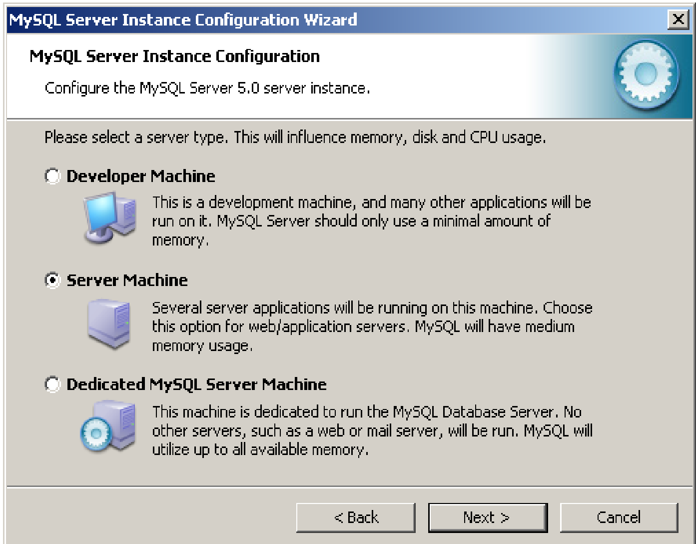
✔ Click Next



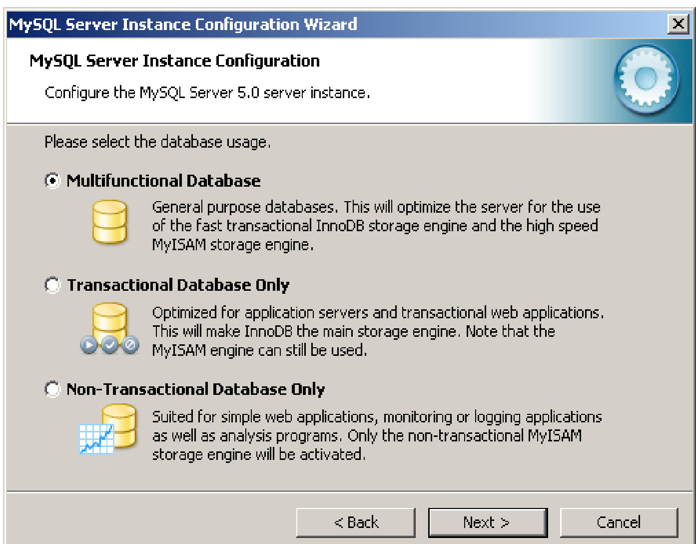
✔ Click Next



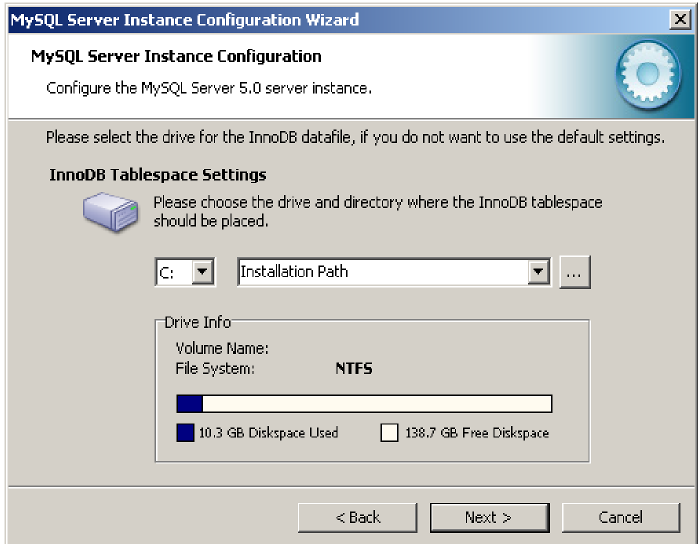
✔ Choose Server Machine, then click Next



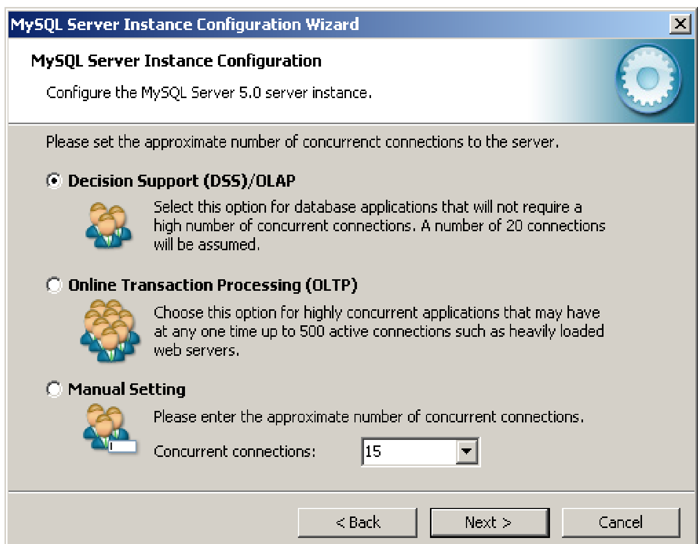
✔ Click Next



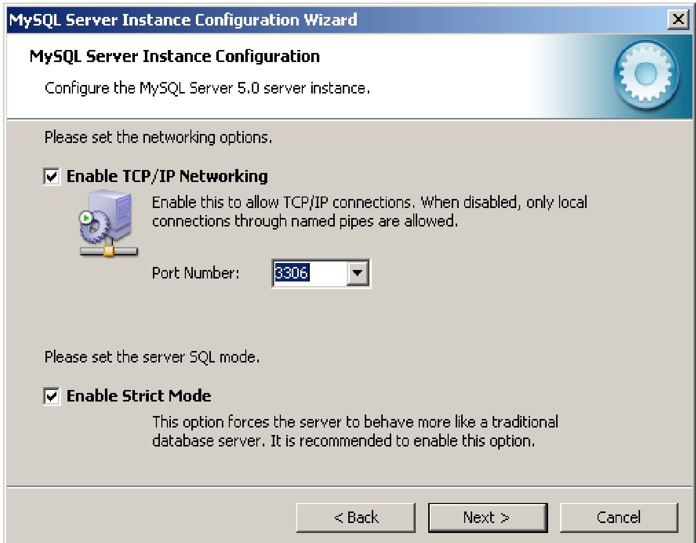
✔ Click Next



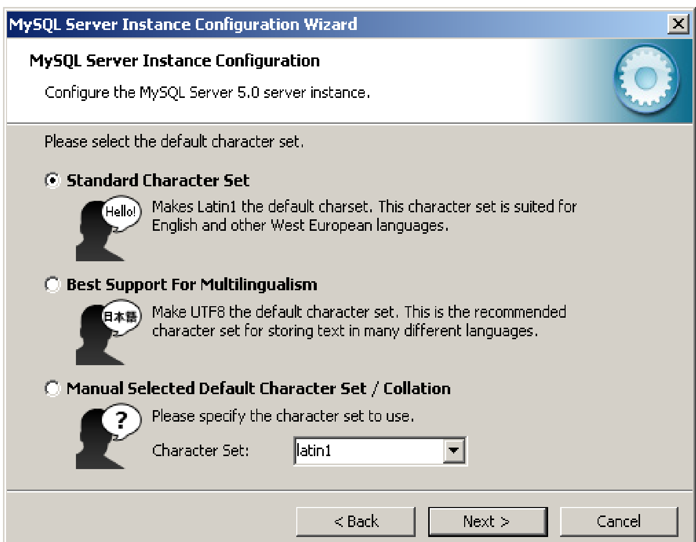
✔ Click Next



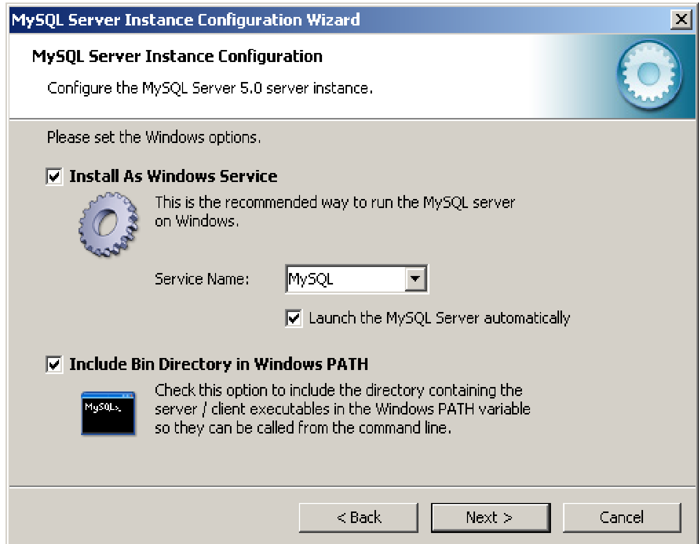
✔ Click Next



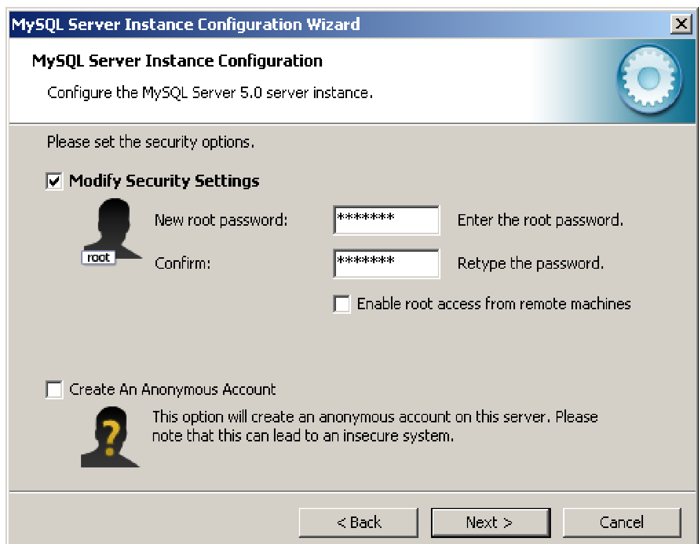
✔ Click Next



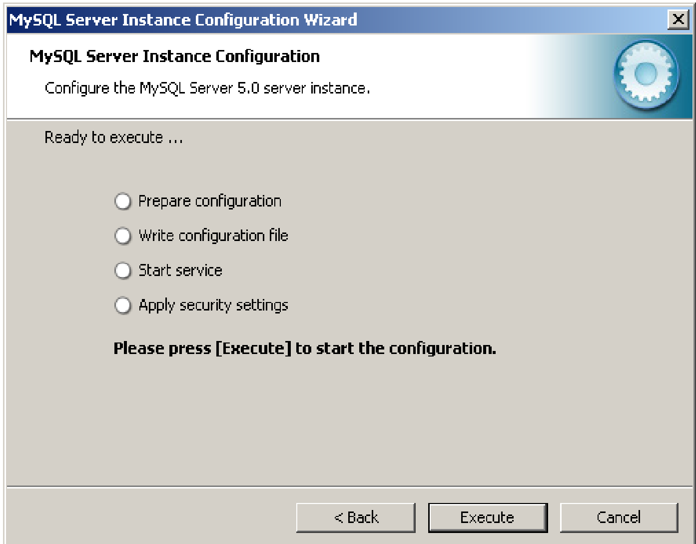
✔ Click to turn on “Include Bin Directory in Windows PATH, click Next



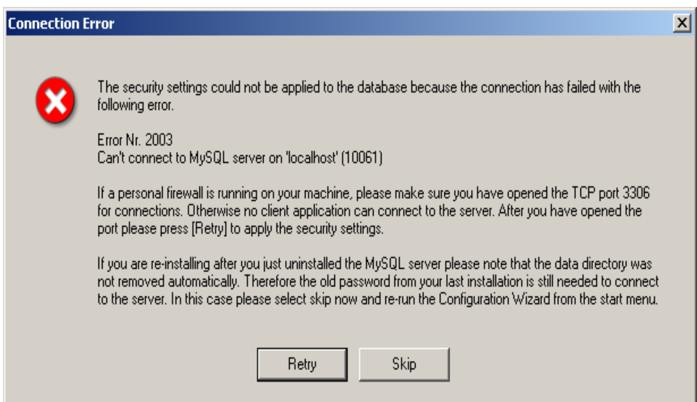
✔ For the root password type: *rootPwd*. Retype: *rootPwd*. Click Next



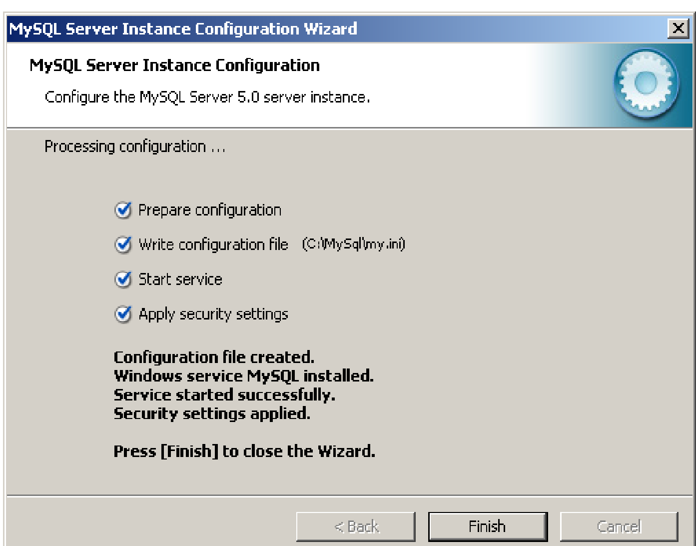
- ✔ Click Execute



- ✔ If presented with this error message, click Retry



- ✔ Click Finish



Firewalls

Your server may have a firewall that is configured to make only certain server-side programs accessible over the network. If this is the case, when you install MySQL on the server, ensure that the server's firewall makes the program:

C:\mysql\bin\mysqld-nt.exe

accessible. This is the standard MySQL server program which provides Sumac clients with access to the database.

Setup Sumac Database

Set up the Sumac database using the applicable one of the following two procedures:

Re-Install Old Data

If you are upgrading Sumac from an old version of MySQL, the first step was to back up the data folder.

- ✔ Copy your database(s) from the data folder on the desktop to C:\MySQL\data. Do *not* copy the mysql folder or the test folder. You only need your database folder.
- ✔ Now you must set permissions so that the new MySQL will let users use your database(s). Here are the steps to do this:
  - Copy the Configure Sumac folder to the server computer
  - Edit sumacSetupC.txt by replacing the word *database* with the name of your data folder.
  - Double click to run SetupSumac.bat

Use New Supplied Database

If you have a database supplied by your Sumac supplier, then:

- ✔ Shut down the MySQL server (run *stop MySQL.bat*).
- ✔ Replace the entire *C:\MySQL\data* folder with the supplied data folder.
- ✔ Copying these files from a CD-ROM may result in the data files being read-only. This prevents Sumac from changing anything in the database. It is imperative that you change all files to be writable (i.e. not read-only) before you run Sumac.
- ✔ Restart the MySQL server (run *start MySQL.bat*).

Check To Make Sure The Installation Is Correct

- ✔ Run Sumac to make sure it works
- ✔ Reboot the server computer to make sure the MySQL service starts correctly.
- ✔ Run Sumac again to make sure it works after a reboot.

Appendix D – Troubleshooting

Trouble Shooting on Windows

If something is not working quite right, Sumac is able to display additional technical information about its operations. The way this works is that a separate window – the Java console window – opens up at the same time as Sumac is operating, and additional information is put into this window.

Turning On The Trouble-Shooting Window

When Sumac is running, it can display a trouble-shooting window. This is primarily useful for figuring out why something is not working. Here are the steps to be followed to get the trouble-shooting window to show and to have Sumac put information into it:

- ✔ Run the Java Control Panel.
  - In the Advanced tab, click to expand *Java console*, then click *Show console*.
  - Now, when you run Sumac, a console window appears at the same time. However, very little information will be displayed in the window, until you tell Sumac that you want it to display details in its trouble-shooting window.
- ✔ Now tell Sumac that you want it to display information in the trouble-shooting window. Here are the steps:
  - Open the *databases.txt* file. This file is located in a folder named *SumacSettings* in the user's home directory.
  - Move the cursor to the very end of the line, and enter a space character followed by the letter *d*.
  - Close the file, and save changes.
- ✔ Run Sumac and log on. At this point, it should be displaying information in the trouble-shooting window.

Running Sumac with a trouble-shooting window all the time is not a good idea because:

- ◆ It slows Sumac. Sumac does a lot of work to format information and present it in the trouble-shooting window. This slows it down, especially for database-intensive operations (e.g. reports).
- ◆ The trouble-shooting window consumes resources (e.g. processor speed and memory), which can lead to other problems if the computer is resource-constrained.

Turning Off The Trouble-Shooting Window

Turn off the trouble-shooting window by undoing the two changes performed when you turned on the window. In particular:

- ✔ Run the Java Control Panel and turn off the console.
- ✔ Edit the databases.txt file and remove the *space-d* at the end of the line.

– End of Manual –