

Create User Accounts

| <i>Speech</i> | <i>Cursor Actions</i> |
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| Each Sumac user needs a user ID and password for logging on to the database. The user ID indicates what the user is allowed to do. It also identifies the user so that Sumac can record things like who created a communication record or who updated a contact record. | |
| To add, remove, or change users, click Utilities, Sumac Administration, and Users. | Show Sumac console. Expand Utilities. Expand Sumac Administration. Click Users. |
| That opens the current list of users for your Sumac database. | Point to Users list. |
| To add a new User, click New. | Click New. |
| Enter the new user's login name... | Enter Login Name. |
| and password | Click Set Password. |
| You can create your own password for the new user, or you can have Sumac suggest a password for you. | Point to Password field. Point to Suggest Password button. |
| If this user is allowed to see payment information or is an Administrator for the database, the password must be more secure. | |
| Follow the instructions to ensure that the password you are entering is secure enough. | Enter password. |
| Notice that as you type the password, Sumac shows you whether you are meeting the requirements for a secure password by clearing out these circles as each requirement is met. | Point to requirements and circles. |
| You must enter the password again to confirm it | Enter password again. |
| Then click OK, to save the password for this User. | Click OK. |
| Sumac shows a list of all the data or commands that are available in Sumac, | Point to the list of Data or Commands. |
| as well as columns for view, edit, delete and special. This allows you to tell Sumac what information this user is allowed to see, change or remove from your database. | Point to View, Edit, Delete, Special columns. |
| In this example, let's say this user has full privileges for Contacts and Communications. | Select Delete for Contacts. Select Delete for Communications. |
| Note that when you turn on a checkbox, the ones to its left are also turned on. This is because you must be able to see and change records in order to delete them. | Point to checkboxes to the left of Delete. |

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| But perhaps this user is the Volunteer Coordinator, and therefore does not need to have access to donation information. Leaving all Donation checkboxes unchecked means that this user will not even have a donations button in the Sumac console. | Point to Donations checkboxes. |
| Continue this process for each of the Data or Commands, setting up capabilities for this user. | Select more checkboxes. |
| When you scroll to the bottom of this window, you can also manage some special capabilities, | Point to Special checkboxes. |
| like making this user an Administrator, allowing the user to make bulk changes to the database, or see sensitive, confidential data. | Point to Administrator. Point to Bulk Import. Point to Sensitive Data. |
| You may want to segment contacts in your database to give only certain users access to certain contacts. | Point to Contact Segments. |
| The area at the bottom of this window lets you choose which segments this user can see. | Point to Client and Staff checkboxes. |
| User Types enables you to specify exactly which users are allowed to see sensitive information for particular contacts in your database. | Point to User Types. |
| Click OK to save this user in your database. | Click OK. Point to new user in list. |
| That user is now able to login and use to Sumac. | Point to new user in list. |
| <i>Check out more training videos to learn more about Sumac.</i> | |