Sumac Version 3.0 Release Notes

February 5, 2009

Contents

Introduction

This document describes features which were added to version 2.5 of Sumac to create version 3.0.

Installation of This Release

Before Installing This Release

This release updates the structure of your Sumac database. *Ensure that your database is backed up before running this new version of Sumac.*

Installing This Release

This release of Sumac is installed differently, and more simply, than previous versions. The process is described in detail starting on page 6.

Using This Release For the First Time

The first time you log on, Sumac updates your database structure; this may take a few seconds, perhaps a minute, so wait while it is being done. A progress bar shows what is happening.

General

The Sumac console has a new splash screen, and there are new icons for the desktop.

While Sumac continues to support its traditional blue colour scheme, there is also a new green one. It not only fits better with our new more colourful logo, but most users seem to prefer it. You can try the green colour scheme by choosing the Colour Scheme command in the Utilities menu in the Sumac console window.

Complete details of installation and configuration are managed by Java Web Start as described on page 6.

On some versions of Windows, with some button style preferences, it was not always clear which of Sumac's buttons were disabled. Now disabled buttons have a more distinct appearance.

The Do-It-Yourself feature has been renamed to Grow-Your-Own. This does not affect how it is used.

When parts of Sumac have not been installed or the database is not accessible, the error messages are more specific and explanatory.

Currency data entry fields support comma separators for groups of three digits, making it easier to read large currency amounts.

Some performance issues in databases with over 100,000 contacts have been resolved.

Auctions

Sumac now has a new module for helping you manage lots in an auction. It can:

- automatically assign lot numbers
- track donors of lots
- support split proceeds (some to your organization, some to the donor)
- support a variety of classifications for lots.

Let us know if you are interested in a demo or trial.

Contacts

The contact list provides the ability to search on the contents of membership directory fields.

If the contact list is showing contact types or desired communications, the loading of the contact list when Sumac first starts up is *much* faster, especially over networks or where there are many contacts.

Changes in the dialog for viewing and editing a single contact:

- First names and recipient fields can now be up to 80 characters long. This is not likely to be an issue for a single person, but sometimes it is convenient to put several first names (e.g. Bob, Carol, Ted, and Alice) into a record for a family with the same last name.

- Extra fields were formerly limited to 120 characters. They can now hold up to 255 characters of text.

- There is a new History tab which shows all information related to that contact, just as if you had expanded the contact in the contact list. In order to cause this tab to show, you must choose a setting in the Administrator Preferences on the Contact tab.

- The Vacation Address tab can be hidden using an Administrator Preference.

- Tabs that do not apply to your installation (e.g. membership, fund requests) are now hidden instead of just disabled.

- There is a checkbox for each email address which can be checked to indicate that the email address should receive email. This lets you send emails to multiple email addresses for a single contact.

- The installation can change the name of the Renewal Date field if it is to be used for something other than a renewal date.

- The Gender menu contains a command to convert from male or female to organization, saving several manual steps that were needed to accomplish this.

Email

As described in contact records above, you can specify precisely which email addresses are to receive emails, including sending each email to multiple addresses for a single contact. This enables you to have a single contact record for a household, and send to multiple people in the household, or to send to both a residence and business address for a single person. When a single contact has multiple email addresses, Sumac generates one email for that contact and sends it to multiple addresses.

Sumac checks to make sure that the email software has been installed correctly, and tells you if you try to send an email when it has not been.

Sumac can email *htm* as well as *html* files.

The TLS security protocol is now supported. This will probably be invisible to you, but enables more secure communication between Sumac and the SMTP server that actually sends the email.

Display Names are supported in sender email addresses. This means that the recipient of your mailings will see the sender as, say, *Benevolent Charity* rather than as *info@benchar.ca*. You put the display name in the office record being used to send the emails.

Fund Requests

The status bar at the bottom of the fund requests list shows the total amounts requested and received for the entries showing in the list.

Inactive

Sumac now enables an administrative user to indicate that certain types of data are inactive, and therefore should not appear in drop-down menus and should not be choosable in dialogs.

Items that can be marked as inactive:

- campaigns
- contacts
- discounts
- events.

Import

A new Shift Cols Right button allows you to re-align columns when a new column has been inserted in data. This makes recurring import operations easier when the incoming data may occasionally have extra columns inserted in it.

Import Workspace

Sometimes data from a spreadsheet is being imported and a single cell may contain a paragraph break. This causes Sumac (and any other program processing the data) to think there are two records. The Import Workspace now contains a button that can re-assemble records that have been split by paragraph break characters in a single cell.

Labels

All Sumac clients can now use the Custom Layout features to print labels. This option was formerly restricted to only clients who had the optional Membership or Ticketing modules. In addition, Custom Layouts have been extended to allow the specification of a font, so that you can, for example, print labels using custom font choices.

Sumac now supports two ways to print labels to greatly reduce your postage expenses:

- It can product machine-readable mailing labels (limited font sizes, mono-spacing font, no comma between city and state) for better recognition by Canada Post equipment.
- It can sort labels into the order dictated by Canada Post's National Presortation Schematic.

Mail Merge

If mail merge is producing a single file, the user has the option of specifying the file name instead of always using a Sumac-defined file name.

Mail Merge now recognizes the file suffix *htm* as well as *html*.

Membership

The payment date and payment type fields are no longer mandatory fields in membership records.

The Membership list supports a new search criterion for "membership renewal complete flag is set".

You can show the member's organization name in the Membership list. This works only if the organization name is showing in the Contacts list too.

Payments

Each payment record can have a purpose (a new lookup list). This enables you to classify payments based on why the payment was made to your organization.

Reminders

Whenever you create a reminder (e.g. from the Contacts list) you have the option of using an action plan.

There is only one button in the Reminders list for creating new reminders. It asks if you want to use an action plan or not. There used to be two buttons, one for regular reminders and one for reminders using an action plan.

Search Builder

Search Builder supports a new type of search that allows more powerful searching for contacts that made or received communications of various types.

Ticketing

When seating assignments were being used, long seating codes did not always display properly in the window for ordering tickets.

The used ticket summary now sorts by contact name instead of ID.

The report that shows Ticket orders by payment type now shows event information, and ordered date.

There is a new report that shows ticket sales by seat (ticket) number.

Time Dockets

Recording of time dockets used to be restricted to Sumac installations that had the Volunteers module. This is no longer the case. There is an installation preference that makes Time Dockets generally available in the Sumac console.

Time dockets used to just relate to a single contact – the person doing the work. Now they can also relate to an additional contact – the client.

Installing Sumac

Java Web Start (JWS)

The new Sumac installation procedure uses an installer program named Java Web Start (JWS). JWS is probably already installed on your computer. You do not need to find it – the installation process does this automatically.

JWS improves the installation process in the following ways:

- JWS automatically installs all files in the right place on your computer, and creates an icon on your desktop for running Sumac.

- Whenever you run it, Sumac automatically checks for software updates and, if there is a new release, gives you the option of installing it.

- JWS ensures that an appropriate version of the Java Runtime Environment is installed on your computer

- If a new version of the Java Runtime Environment is subsequently installed on your computer, Sumac automatically uses it.

Macintosh Warning

While JWS works fine on the most recent Mac OS X 10.5.6, we have found that it works irregularly on some previous versions. If you can update to Mac OS X 10.5.6, please do it before installing Sumac. If you still have any difficulty, let us know: we can provide a dmg file for more traditional Macintosh-style installation of Sumac.

Start The Installation Process

Here is how to install Sumac on a Windows (2000, XP, Vista) or Macintosh computer:

Use a browser to navigate to:

> http://www.sumac.com

Click the Clients button to enter the client section of the web site. The Client Login is *sumac*, the password is *simply*. Under *Current Sumac Releases*, click *here* to navigate to a page like this:

The links for Release Notes, User Manual, Administrator Manual, and Applications Manual link to PDF documentation. You can view the documentation online or download it.

Decide whether you are installing on a Macintosh or a Windows computer, then click the appropriate word *Install* near the bottom of the page. This tells your browser to download and open a file named Sumac.jnlp. Sumac.jnlp contains instructions telling JWS how to intall Sumac.

Before this download works, depending on the configuration of your browser program, you may be asked to confirm that you want to open Sumac.jnlp. A dialog like this, or something asking the equivalent question, might appear:

To avoid this dialog in future, if you have the option, you should click *Do this automatically for files like this from now on*, or the equivalent thing in your browser. Then click OK to tell your browser you want to open this file with JWS.

Once you tell your browser to use Java Web Start, the JWS startup screen appears, probably very briefly:

Then JWS shows a progress screen to tell you it is downloading Sumac:
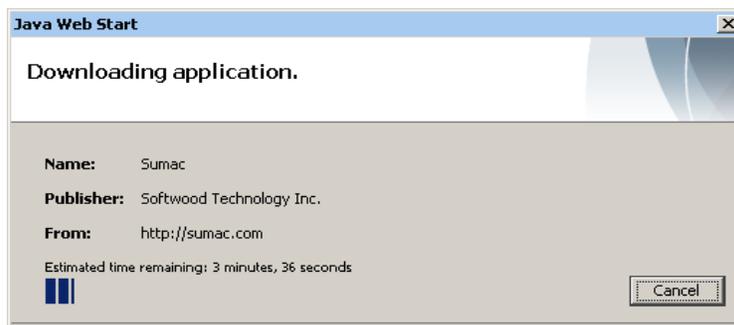
If your computer is running an old version of Java, the above window may look like this:
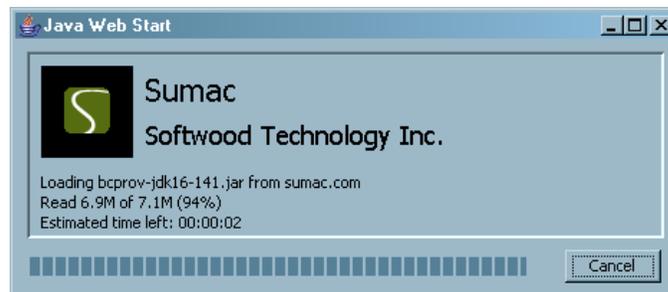
Wait while JWS downloads Sumac. You may then continue to the next page to install a new version of the Java Runtime Environment. Alternatively, you may continue to the page after that, and run Sumac for the first time.

Optionally Install a New Java Runtime Environment (JRE)

If your computer is running an old version of Java, then JWS will install a newer version for you. These dialogs, and perhaps some others in which you need to approve Java license conditions, may appear:
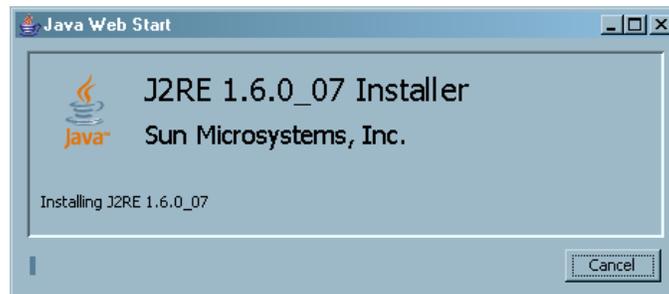
Run The Newly-Installed Sumac For The First Time

As soon as it finishes downloading, JWS will run Sumac. For security purposes, the first time you run Sumac, you are asked to approve the publisher of the software. First you will be asked to approve Softwood Technology as the publisher of Sumac:

Click the *Always trust content from this publisher* checkbox, then click Run. If you are installing on a Macintosh, then you must click a Show Certificate button to show the checkbox that you click to indicate you trust this publisher.

Next you will be asked a similar question to approve some Bouncy Castle software. Bouncy Castle is an open-source encryption package used by Sumac.

Once again, Click *Always trust content from this publisher*, then click Run.

Sometimes, on some combinations of operating system and browser, you may also be asked to approve Sun Microsystems as a publisher.

At this point, Sumac runs, and you log on and use it as you always have in the past.

The next time you run Sumac...

When Sumac was installed, a Sumac icon was put on your desktop. When you want to run Sumac again, double click that icon.

If you initially installed Sumac with an old version of Java, then the second time you run Sumac, you may be asked to update some components. Click OK to approve the updating, and a few seconds later Sumac will run.

If Sumac has been updated...

If a new version of Sumac 3.0 is released, the version installed on your computer will be updated largely automatically. The next time you run Sumac, it will present a dialog like this:
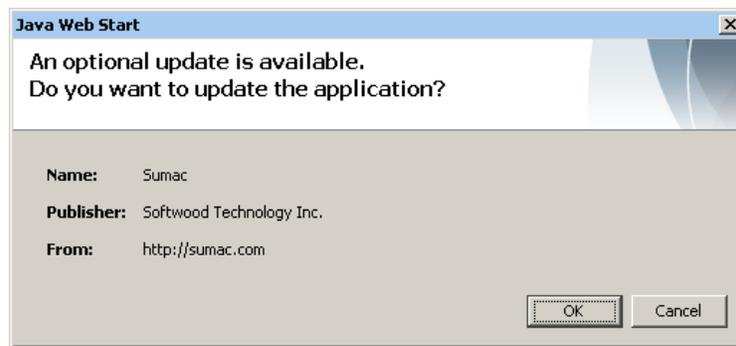
You should click OK to download the new release. It then runs automatically.