



Administrator Manual

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Sumac Documentation

Sumac is described in three books:

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

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

Version Control

Changes

Most Sumac documentation changes each time there is a release. Since Sumac is released approximately once every two months, this means the documentation is regularly updated.

If a particular document has not had to be updated because of new software releases, then that document is reviewed and updated no less than once per year.

Current Version

The current version of Sumac documentation can always be downloaded from <http://sumac.com/support>.

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 B – Install MySQL* on page 24.

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:

If you want to...	You need to know...	To do it, click this button...
connect to an existing multi-user (Gold) database	name of the server that holds the database name of the existing database	<input type="button" value="Use Existing Database"/>
create a new single-user (Silver, Bronze) database for use on this computer	your organization name Security Code received (by email) from Sumac	<input type="button" value="Single User Database"/>
create a new multi-user (Gold) database on a MySQL server	your organization name Security Code received (by email) from Sumac name of the server that holds the database database server administrator user ID and password name of new database to be created	<input type="button" value="Multi User Database"/>
create a new single-user demo database on this computer	[no further information required]	<input type="button" value="Demo Database"/>

Click one of the four buttons:

<i>Button</i>	<i>Use this button if...</i>	<i>Notes</i>
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 <i>localhost</i> 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: <code>info@sumac.com</code> The user ID and password for this demo database are <i>admin</i> and <i>admin</i> .
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 <i>admin</i> and <i>admin</i> .
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 <i>admin</i> and <i>admin</i> .

If you do not successfully log on the first time, seek guidance from *Appendix A – Unable to log on* on page 21.

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 6.

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 identi-

fier (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
```

If the database connection is encrypted, you can put a space, followed by *tls*, at the end of the line

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 14.

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 a Utilities menu near the bottom. This menu contains additional commands that a Sumac administrator needs to configure and control how Sumac works. This menu has the following particularly noteworthy commands:

<i>Command</i>	<i>Purpose</i>
Customize Database/Lookup Lists	Manage lists of lookup values which appear in drop-down menus throughout Sumac.
Customize Database/Offices	Specify your organization's office(s), and the connection information needed to send email from Sumac.
Customize Database/Preferences	Specify globally applicable options for your Sumac installation.
Sumac Administration/Re-organize Types	Create facts from contact types and communication types. See Re-Organize Types on page 9.
Sumac Administration/Change License	Change the options, limitations, and expiry date of a Sumac installation.
Sumac Administration/Clear All Locks	Unlock records that remained locked because of system crashes.
Sumac Administration/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:

Create Facts From Contact Types and Outbound Communication Preferences					
Contact Types		Communication Types		Facts	
Name	Count	Name	Count	Name	Count
Alumni	23	Annual Report	17	Program: Client	2
Board	20	Client Newsletter	30	Program: propagation	2
Corporate	7	Direct Mail	31	Content: annual report	2
Foundation	7	Donor Newsletter	32	Content: donor newsletter	10
Government	18	eMail	4	Content: monthly newsletter	0
Household	2	Fax	26	Medium: email	910
md Choir	8	Funder Newsletter	64	Medium: paper	1
md Ensemble	3	newsletter	17	Medium: telegram	2
md Orchestra	6	phone call	29		
Media	5	Workshop Notices	32		
Past Board	13				
Past Staff	18				
Staff	5				
Student	6				
VIP	1				
Volunteer	172				

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, click Utilities/Customize Database/Lookup List 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.

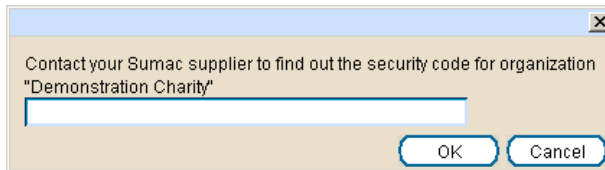
Hint: Sometimes this initial step is unnecessary because the initial license is set up by your Sumac supplier.

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.

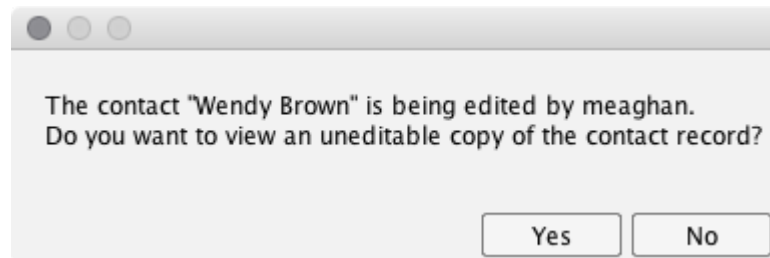
Click Utilities/Sumac Administration/Change License to receive a prompt for changing the security number. The prompt looks like this:



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. When a user tries to edit a locked record, a message that says someone else is editing that record appears:



The user can then click *Yes*, to see an uneditable copy of the record. Clicking *No* dismisses the dialog.

Bad Lock

If the computer of a user who is editing a record crashes then, even though no one is actually still editing the record, the record is locked and no one will be able to edit it.

Here is how to make the record editable again:

Simple Resolution

Click Utilities/Sumac Administration/Clear All Locks 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 connected to your Sumac database.
- ✓ Start Sumac on one computer. Log on as an administrator.
- ✓ Click Utilities/Sumac Administration/Clear All Locks.

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

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.

The screenshot shows a dialog box titled "Office" with the following fields and options:

- Organization Name
- Street A
- Street B
- City
- Province
- Country
- Postal Code
- Phone
- Extension
- Fax
- Web Site
- Charity Number
- SMTP Server: Port (usually 25 or 587) 0
- Do Not Use TLS
- SMTP Server
- SMTP Server: User
- SMTP Server: User Password
- Outgoing Email: Display Name
- Outgoing Email: "From" Address
- Default Office
- Time Zone (dropdown menu)

Buttons: OK, Cancel

Users

Users List

You get access to the list of users by choosing the Users command in the Administrator manual. This window has standard buttons for adding and deleting users.

If a single user record is selected in the list, then the New button gives you the option of creating a user record the same as the selected one. This option lets you quickly create a user with the same security settings as another user.



Editing a Single User

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:

User

Login Name Set Password

Contact  


Notes

Accepts Licence

Locked (log-on is prevented)

Data or Commands	View	Edit	Delete	Special
Auctions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Campaigns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Collections	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Communications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Course Registrations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Donations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Forms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Funding Programs and	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Invoices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Job Openings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ledger Entries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Pledges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Payments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Report Distributors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Sales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Proposals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Prospect Ratings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Reminders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Contact Segments

 Set checkboxes for the segments of contacts which the user may view. If the user can see all segments, do not set any checkboxes.

Client Support Fundraising

OK Cancel

A user record can be connected to a particular contact, chosen in the User record. Since contacts can log on to a website, this provides the connection between a user logged on via a website to the user's capabilities defined in the user record.

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.
Change Lookup Lists	This line, in the list of types of records that can be altered by a user, allows a user to edit lookup lists without having access to all admin functions.
Administrator	<p>If a user is given the Administrator capability, here is what that user can do that other users cannot:</p> <ul style="list-style-type: none"> ◆ 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. <p>The Administrator capability also allows these extra capabilities in optional Sumac modules:</p> <ul style="list-style-type: none"> ◆ 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.
Use Duplicate Buttons	By default, this capability is enabled for each user. However, some inexperienced users have trouble distinguishing duplicating an existing record from creating a new one, so you may want to eliminate the use of Duplicate buttons for a user. Note that if you turn off this capability, it applies to all Duplicate buttons in all Sumac lists.

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.

Users In Segment

If your organization is widely distributed, it may be useful to have more than one person able to edit the list of users, so that each location can have its own user administrator. Sumac handles this as follows:

- ✓ Define a segment for each location, and assign users to their appropriate segment(s).
- ✓ Give the local user administrator the ability to view, edit, and delete the module named *Users In Segment*. This list is the list of users only in the local administrator's segment.

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 dialog box titled "Specify the User Password" contains two text input fields: "Password" and "Password (confirm)". To the right of the "Password" field is a "Suggest Password" button. Below the input fields is a list of password requirements: "If the user is an administrator or can see payment records, the password must: contain at least one alphabetic character (A to Z, a to z), contain at least one numeric character (0 to 9), contain at least one character that is not alphabetic or numeric, not contain spaces, and be at least 7 characters long". At the bottom right are "OK" and "Cancel" buttons.

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

The text field shows whether the password is strong enough for a user who can be an administrator or can see 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 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 or be an administrator.

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.

<i>Data Element</i>	<i>Impact of Making it Inactive</i>
campaigns	<ul style="list-style-type: none">◆ appear grey in CAMPAIGNS list◆ do not appear in dialog for selection
contacts	<ul style="list-style-type: none">◆ 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	<ul style="list-style-type: none">◆ do not appear in drop-down menus for selection
events	<ul style="list-style-type: none">◆ 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

As a Sumac Administrator, you are responsible for keeping your data secure. Read the *Security and Risk Management* manual to find out how.

Other Sumac Administrator Roles

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.

Current information and recommendations about backing up your Sumac data can be obtained on the sumac.com website. Click to the support information: <http://sumac.com/support>. Then read the Frequently Asked Questions about backing up your database.

If you want a quick snapshot of your entire database, all in a single file, click Utilities/Sumac Administration/Backup Entire Database. This command saves the entire database into a single file.

If you need to restore a database, choose Utilities/Sumac Administration/Use New Database and click Restore Backup. Then follow the instructions to tell Sumac where to put the newly restored database.

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.

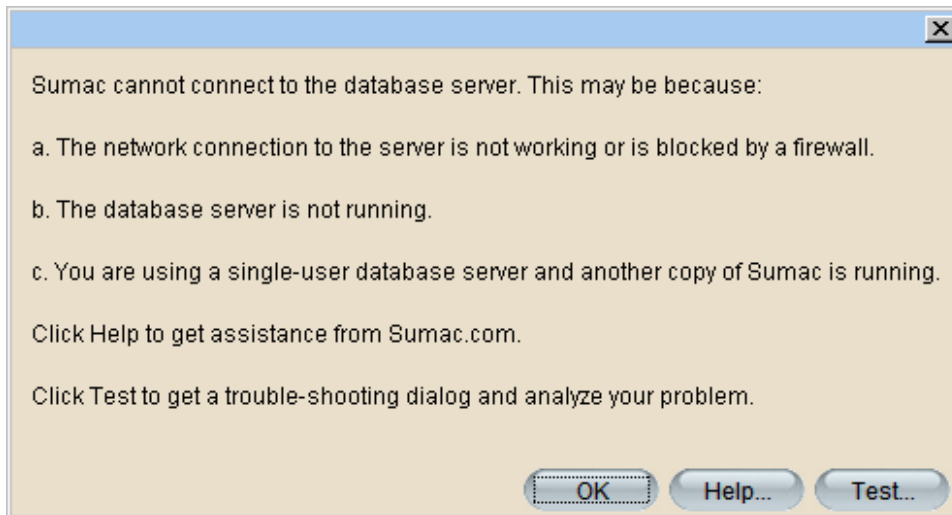
Set up Households

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.

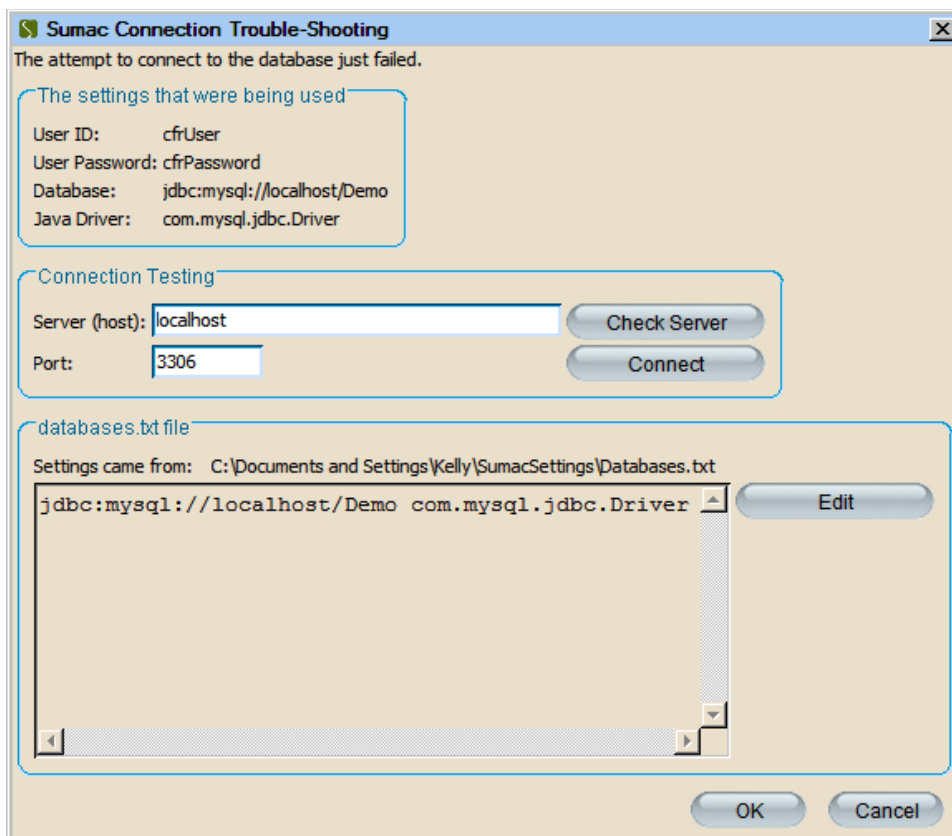
Appendix A – Unable to log on

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 allow 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 access (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 SQLEException: Access denied for user: 'xxxx@192.168.2.13' (Using password: YES)
```

sometimes followed by some lines of additional information.

Appendix B – Install MySQL

General Warnings

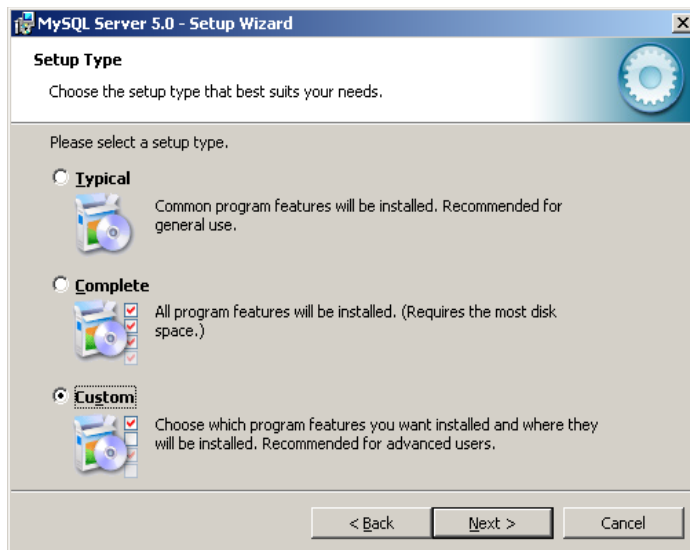
- ◆ All operations described in this document need to be performed on the MySQL server computer.
- ◆ Before you begin, ensure there is not already a version of MySQL installed. If there is a version already installed, it may be used by some other program that is dependent on that particular version of 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.

Install MySQL 5.0.45

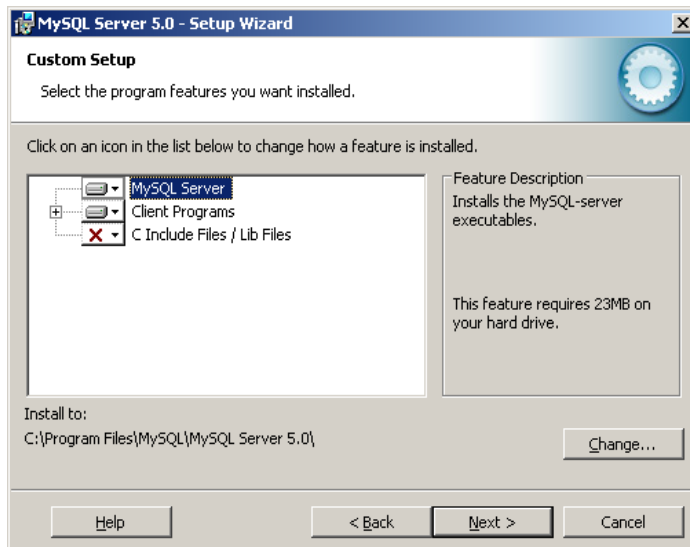
- ✓ Copy the supplied file (mysql-essential-5.0.45-win32.msi) to the desktop of the server computer, then double click to run it.
- ✓ Click Next:



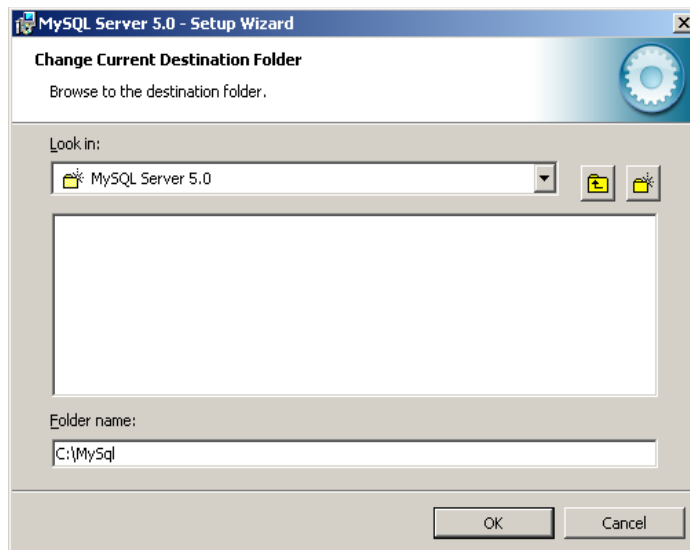
- ✓ Choose Custom, Click Next



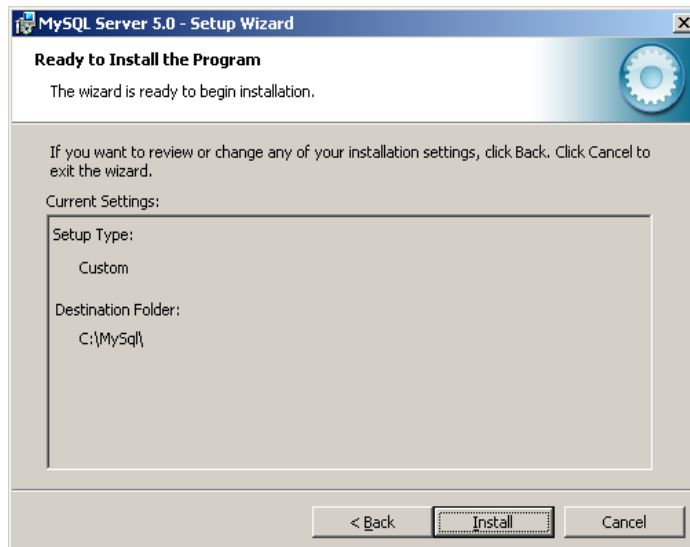
- ✓ Click Change...



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



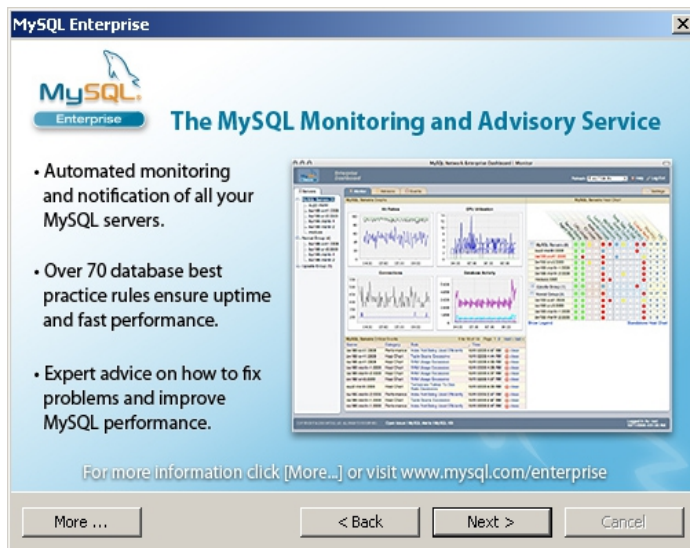
- ✓ Click Next, then click Install.



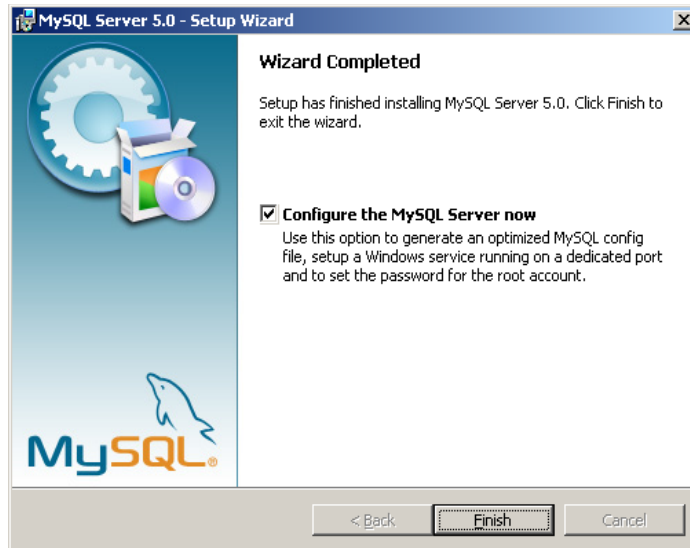
- ✓ When the following window appears, click Next



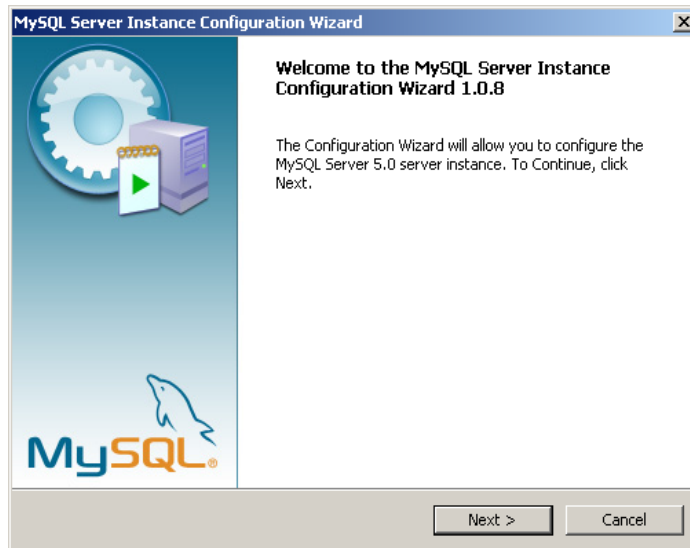
- ✓ Click Next



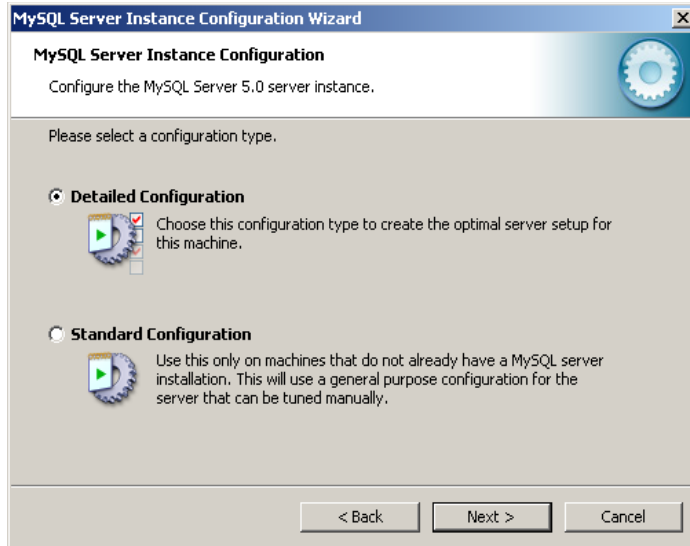
- ✓ Click Finish



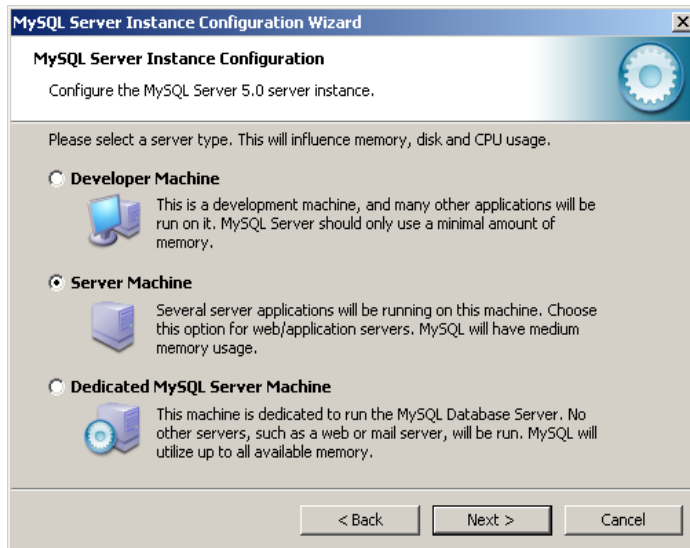
- ✓ Click Next



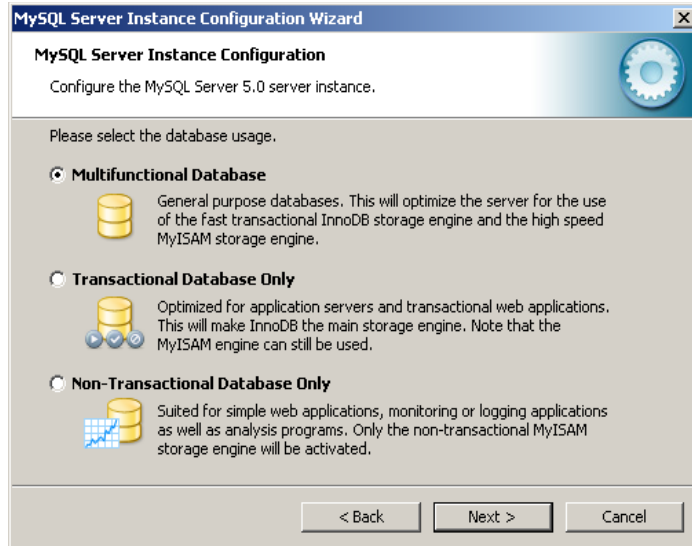
- ✓ Click Next



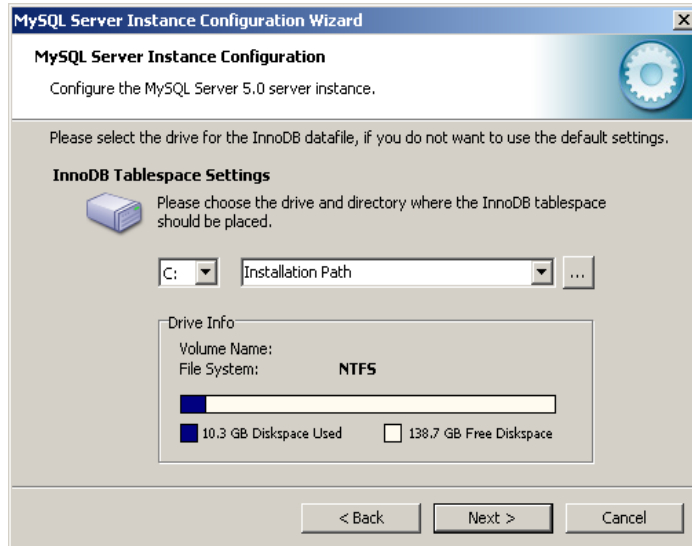
- ✓ Choose Server Machine, then click Next



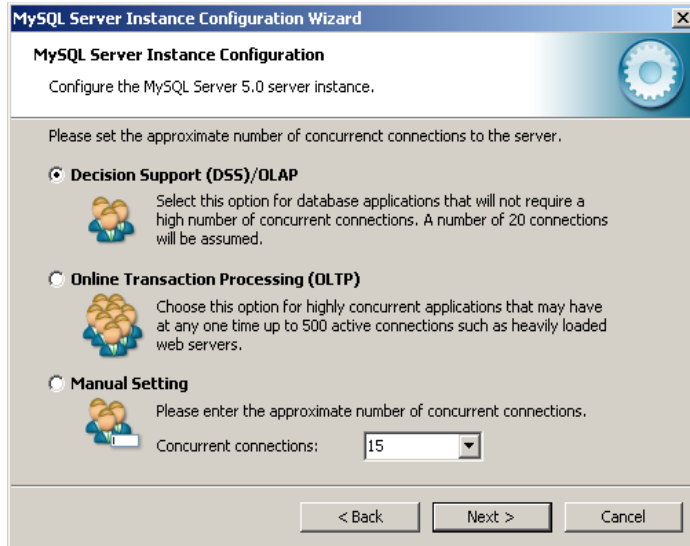
✓ Click Next



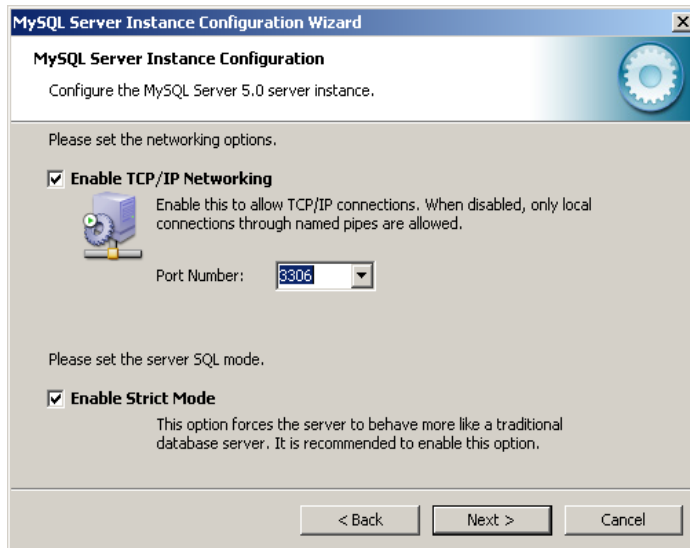
✓ Click Next



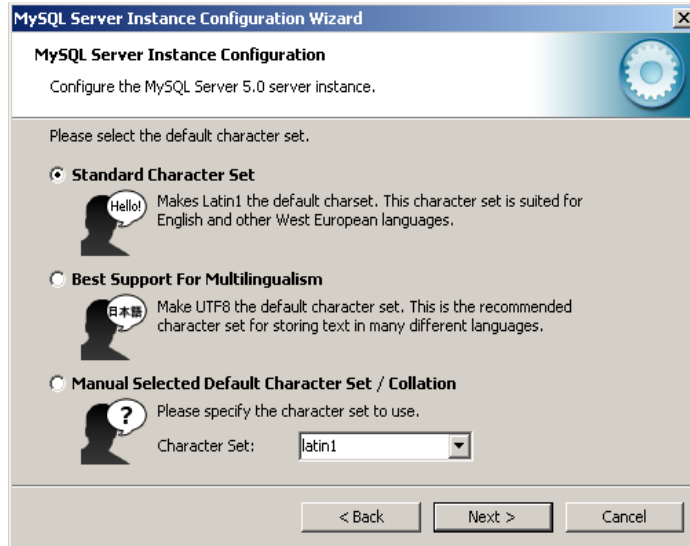
✓ Click Next



✓ Click Next



- ✓ Click Next



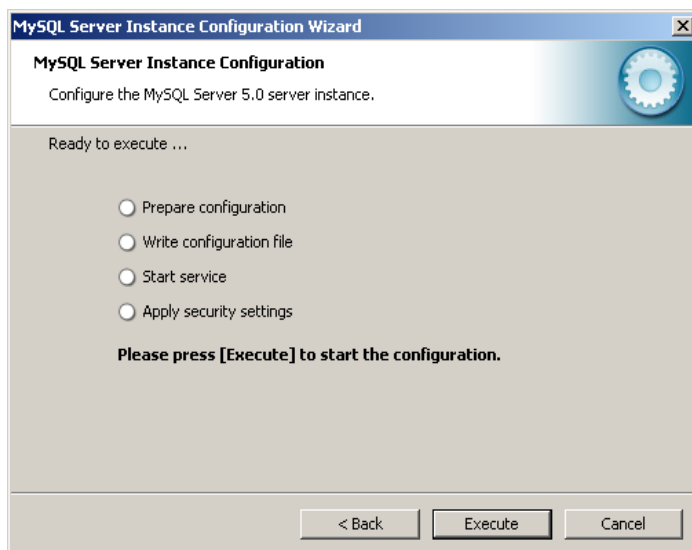
- ✓ Click to turn on “Include Bin Directory in Windows PATH”, click Next



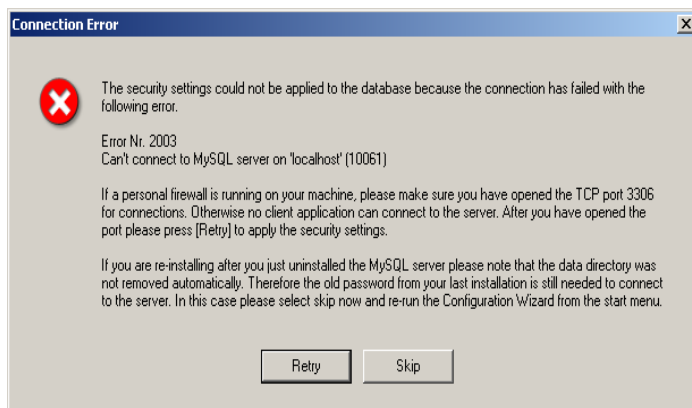
- ✓ For the root password type: *rootPwd*. Retype: *rootPwd*. Click Next



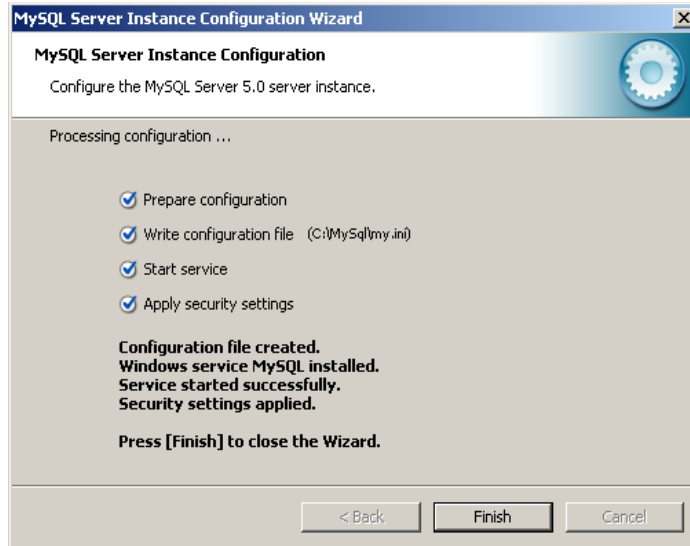
- ✓ Click Execute



- ✓ If presented with this error message, wait about 30 seconds then 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.

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.

– End of Manual –