

Administrator Script

Introduction

This lesson discusses the role of a Sumac Administrator.

Before viewing this video, you should view:

Lesson 1 *Sumac Basics for All Users*

Most things that have to be done by a Sumac Administrator are in the Administrator menu, so this lesson looks at all the commands in the Administrator menu.

Users

First, the administrator must create user accounts, which specify who is allowed to use Sumac, and what data they are allowed to see and change within Sumac.

Click to create a new User record. Enter a user ID and password. Note that Sumac can generate random secure passwords for you automatically.

Now specify what the user is allowed to do to each type of data in the Sumac database.

You can specify whether a user is allowed to see data. Most users can usually see most data.

You can specify whether a user is allowed to change or create a type of data. Whether a user can do this usually depends on his or her role in the organization. For example, only very few people should be allowed to change and create donation records.

Finally, you can specify whether a user is allowed to delete information. Often a user who is allowed to change and create data can also delete it. One important exception is contact records: almost no one should ever delete a contact record, so very very few people should have that capability.

At the bottom of the list of checkboxes, there are also some special purpose capabilities.

Any user who has the Administrator checkbox selected is a Sumac Administrator. The Administrator menu will appear in that user's Sumac Console window.

The Bulk Import capability allows a user to use the Import command and also to use Set Values buttons in various lists.

Adjust Order Pricing enables a user to make a manual adjustment to the calculated price of a sale or ticket order.

Ticket Holds authorizes a user to reserve or block or hold seats at a ticketed event.

Sumac can receive email, and automatically turn on and off various communication

preferences based on the incoming email. A user with the Receive Email capability is allowed to initiate this process.

The Sensitive Data feature of Sumac allows you to set communications and contacts to be sensitive. Only users with this Sensitive Data capability are allowed to see sensitive records.

Change License

Each Sumac database contains a security code which indicates the features of Sumac that are available, and also indicates an expiry date. Each year, when you renew your Sumac licence, you are emailed a new security code. Use the Change License command to enter the security code into Sumac.

Clear All Locks

When someone is editing information in Sumac, the information may be locked so that no one else can edit it at the same time. If the computer of the person who is doing the editing should happen to crash, it leaves the data locked. When this happens, the Sumac Administrator can unlock the data using the Clear All Locks command. This command unlocks any locked data in the database.

It is a good idea to have all other users quit Sumac before clearing the locks.

Lookup Lists

Throughout Sumac there are many drop-down menus and groups of checkboxes. For example, in a contact **[open contact list, double click a contact]**, there is a drop-down lists of languages **[point]** and a group of contact type checkboxes **[point]**. These standardize and speed up the entry of data into many fields. **[close contact and contacts list]**

In Sumac, these lists of values are referred to as Lookup Lists. A Sumac Administrator manages the lookup lists.

Choose Lookup Lists from the Administrator menu.

The lookup lists work like other lists in Sumac: a list of editable entries in the middle and standard buttons along the bottom. The searching area at the top lets you choose which lookup list you want to examine or change. They are broken into areas **[point]**, and within each area there are lists **[point]**.

For example, within the Communications area **[point]**, you are looking at the Communications Types **[point]**. The Communication Types are listed **[point]**.

If you want to add a new contact type, **click** to choose the Contacts area, **click again** to choose the Contact Types list, then **click New** to add to the list.

For most lists, as soon as you enter the changes in the Lookup Lists window, the changes take effect throughout Sumac. For some changes it is necessary to quit and restart Sumac in order to cause the changes to take effect.

Contact Types are one of the lists whose changes take effect immediately. So if you **close** the lookup lists window, **go to** the contacts list, and **look** at a contact, you see **[point]** the new contact type has been added.

Offices

You tell Sumac about office-dependent information by creating one or more office records. Typically you would have one office record for each of your physical offices. If people use Sumac from home and need different SMTP settings so that Sumac can send bulk email from their home offices, you need to create an office record for each home office too.

Choose the Offices command to get a list of Offices. Click New to create a new office record.

[review each field in the office record]

Preferences

There are system-wide preferences which affect how Sumac behaves for all users of the Sumac database.

There are many optional or configurable behaviours in Sumac. The Preferences command is used to specify these behaviours.

Let's look at each tab and configuration setting in the Preferences dialog.

[go tab by tab left to right]

Backing Up Sumac Data

Finally, it is imperative that a Sumac database be backed up on a regular basis. This is a job for the Sumac Administrator.

The impact of losing your data can be devastating, so it is imperative that you back up your Sumac database. The details for how to do this are beyond what can be expressed in a training video.

Go to Sumac.com, click Support, then click FAQs. One group of frequently asked questions provides detailed information about backing up your Sumac database.

Conclusion

In this lesson you learned key tasks for a Sumac Administrator:

- add users and specify their capabilities
- update licensing information
- unlock locked records
- manage lookup lists
- enter information about offices
- specify system-wide preferences
- back up the Sumac database.

You should now proceed to other Sumac lessons to learn more about how Sumac can help you every day.