

# Lesson 1 - Sumac Basics for All Users

This lesson provides general information about Sumac for all users. It discusses how to run Sumac, log on, and then presents how data is organized and managed in Sumac.

## Run Sumac

If you have installed Sumac in the standard way, there is a Sumac icon on your desktop. Double click it to run Sumac. When you do this, a Java window briefly appears. This window checks for updates to Sumac. **[Double click sumac]** Then Sumac presents a Log On dialog. **Enter your user ID and password,** then **click Log On.**

## Sumac Console

The Sumac Console appears.

The configuration of buttons in the Sumac console varies, depending on which modules your organization has licensed. Usually when you are working in Sumac, you work with a list of some type of information. If you want a list of contacts, you click the contact button. If you want a list of donations, you click the donations button. The Communications list enables you to explore most of the basic features of Sumac list windows. To open the communications list window **Click the Communications button.**

## List Window

Like all Sumac list windows, the communications list is organized into five areas:

At the top is the title bar, which identifies the content showing in the window – in this case, Communications.

Next is a Searching area for finding and displaying information.

In the middle, and usually occupying most of the window, is the list of data presented, one row per record.

There are buttons under the list of data.

At the very bottom of the window, there is a status bar. This area shows status information about the items showing in the list. It also shows help information about what you are pointing to. **Point at the New button,** and the status bar

explains what the New button does. Also, if you perform a long operation, the status bar shows progress information.

## Search

Let's do a search to find all the communications that relate to a particular event. **Choose the event first, then click the Search button.** Sumac finds all the communications that match the search criteria – in this case, relate to a particular event – and shows them in the list. The button next to search button, a search icon with red X over it, clears all the search criteria, so if you want to do a different search you can clear the old one and start over.

Notice that the status bar shows how many records are showing in the list. If there are many records, **use the scroll bar** to move up and down in the list or records.

## Sort

You can sort the list by clicking on any column name.

For example, to sort data by contact name **click on column title “contact name”**. Sumac sorts the data and an upwards pointing triangle appears, which shows that the column has been sorted in ascending order. To sort in descending order **click the column title again** and the triangle points down.

Sumac can do two-level sorting. Because of the previous search, you are looking at all the communications for a particular event. **Click to sort by contact name**, then **click to sort by communication type**. Notice that within communication types, the records are also sorted by contact name.

## Adjust Column Width

You can adjust the width of a column by dragging the line on the right hand side of the column title. **Point the mouse at the line**, and it changes to arrows. Press the mouse button and **drag to the right or left**, releasing the mouse button where you want the edge of the column to be.

## Choose Columns

You can specify which columns you want to see. Immediately to the right of the column titles there is an icon. **Click it**. Sumac shows a dialog that allows you to drag column names back and forth between the list of Available Fields and the list of Fields To Show. For example, if you want to show the campaign associated with each record in the list, **drag Campaign Name** from the available

list to the Fields to Show list. Note, that you can also **move fields up and down** to change the order of the columns by dragging. The list appears with the new columns when you **Click OK**.

## Sort

If a column is sorted in ascending order, then you can type on your keyboard to find records with specific values in that column. For example, if you want to find the name which starts from “M”, click to sort by name, then **type “m”**. Sumac scrolls the list to show the first contact name that starts with “M”.

## Adjust Row Height

Finally, you can adjust the height of records showing in the scrolling list. There is a black line separating the first and second records. Drag it to **adjust the line height**, making each record taller or **shorter**.

## Select Records

To select records in the list, use standard keyboard and mouse combinations:

to select a single record, **click once**,

to select a group of contiguous records **Hold down the shift key on your keyboard and click the last record in the group**.

to select and de-select individual records **hold down the Control key on Windows, or the Command key on Macintosh, and click**

## Double Click to See Details

If you want to see or change the details of a record, **double click** the record. A window appears showing all the details. In the details window you see that some of the fields labels are coloured. A coloured field label indicates the field is mandatory.

This window shows two icons you regularly encounter in Sumac. If a field identifies a contact, it has a person icon which allows you to choose any contact in the database. If a field holds a date, you can click the date icon to choose a date from a calendar.

## Windows Automatically Cascade

Notice how Sumac cascades windows down the screen. The list window is a bit below the console. When you edit an item in the list, its window is positioned a bit below the top of the list window.

By the way, if you want see the list without closing the editing window, you can **drag the editing window** out of the way.

## OK and Cancel

When you are viewing the details of a record, you can click the OK button to save any changes back into the database. Alternatively, to close the window without saving changes **click the Cancel button**. By the way, the Enter key on your keyboard is equivalent to clicking the OK button, the escape key on your keyboard is equivalent to clicking the Cancel button.

## Buttons

Now consider the buttons. There are three basic buttons which are in every list window. They are “New”, “Delete”, and “Export or Print”.

### New Button

Use “New” to enter a new record into the database. For example, **click New** in the Communications list to enter new communication record. **[Click cancel.]**

### Delete Button

The “Delete” button lets you delete selected data. For example, **click to select several communication records**, then **click the Delete button**. Sumac asks you to confirm that you really want to delete them, and if you click OK, it deletes them. **[Click cancel.]**

### Export or Print Button

Use the “Export or Print” button to print data or export it into a file which can then be open with other programs like word processing or spreadsheets. **Click the Export or Print button**. Sumac confirms that you want to process all records showing in the list. **[Click OK.]**

In the open window you see two lists of field names: “available fields” to choose from and “fields to export or print”. To select what you want to be shown in your report, **drag field names** from one list to another.

## Recurring Exports

If you regularly export or print the same set of columns, then you may want to save the list of chosen columns for future reference. Click the Save Column Choices button to save the “Fields to Export or Print” to a file. Later, when you

do another export or print operation, you can use the Load Column Choices button to load all the chosen columns from the file.

## Print Layout

Once you have chosen the desired list of fields, click Export to send the data to a tab-delimited text file.

If, instead of exporting, you want to print the data, use this panel to format the print layout.

You can **drag to adjust column widths**.

The red line shows edge of the printing area on the page. If you have adjusted column widths and the data still does not fit, there are two other things you can do:

To print sideways on the paper **Choose “landscape orientation”**; notice that the red line moves over. Alternatively, to make the columns narrower but taller to hold more data you can **adjust the height** of each line.

Then click the Print button to send the report to your printer.

## Ad Hoc Reporting

You can Search, sort, and export or print from every Sumac list window. This provides the ability to do ad hoc reporting. First search to get a list of records, then sort them in the order you want, then choose the columns to be printed or exported.

## Summary

This completes a description of how windows and lists work and can be managed.

In this lesson you learned how to

- start-up Sumac
- use the Sumac Console to choose a list,
- then how to search, sort, edit, add, delete, and export from a list

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