



Version 3.5.2 Release Notes

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Introduction

This document describes features which were added to release 3.5.1 of Sumac to create release 3.5.2.

General Usability

Appearance

Sumac has not had a general face lift since the first version in 2004. In this release, we start to update the general appearance of Sumac, a process that will continue over the next few releases. Note that this work is to change appearance, not functionality. Sumac will continue to work as it always has.

The main appearance change in this release is that buttons have a more three-dimensional appearance. Most people find this pleasing.

The newer buttons present slightly lower contrast: the old buttons were black text on a white background – the highest possible contrast. This change may be a problem for some people with vision problems. So we have added a new High Contrast colour scheme.

We would love to hear your feedback on these changes, and any other ideas about how to enhance the appearance or general usability of Sumac.

Desktop Integration

When you double click to open a file that holds saved Search Builder criteria (a .ssc file), Sumac runs, lets you log in, and then opens the contacts list and the Search Builder window to show the file that was double clicked. This is a quick way to get a specific list of contacts by just double clicking on your computer's desktop.

Column Totals

In any list of records, when you click to sort a column, if that column can be totaled, then the total appears in the status bar at the bottom of the window.

Printing Page Ranges

When you print ranges of pages (e.g. 3 to 5), Sumac prints the correct pages instead of always starting from page 1. Note that this does not work properly on Mac OS X – a problem with the Mac (i.e. not with Sumac) at the moment.

Automatic Re-Connection

When you lose a connection to the database, Sumac automatically re-connects. This is particularly helpful if your connection to the database is intermittent, perhaps over the Internet or an unreliable wireless connection.

Campaigns

The loading of campaigns from the database is much faster. This is especially noticeable if you connect to your database on a relatively slow connection (e.g. over the Internet).

Collection Management

The dialog for entering collection objects has been re-organized so there is one set of tabs across the top. The tabs present both what was called static attributes and also dynamic (now called Dated) attributes.

In addition, there is a new tab for access points, so you can specify as many entries in classification schemes as you want. When you search for a classification scheme entry, you find objects by either their primary descriptive entry or by these access points.

In addition, several minor adjustments were made to the appearance of the dialogs for describing collection objects.

Contacts

Bulk Email

You can export contacts directly from the contacts list to a Constant Contact mailing list.

Segmentation

The contacts list can be segmented. Each user can be restricted to seeing only the contacts in certain segments.

Search Builder

Search Builder can now find contacts who made donations that had *no* fund specified.

Course Registration

You can create a new course registration directly from the new drop-down menu in the contacts list.

In the course registration list window, there is a button for moving a student from one session to another.

Search Builder allows you to find contacts based on their course registrations.

In the contacts list, you can expand a contact to see all the sessions that contact is registered in.

When a session is marked as locked, it no longer appears when you choose a session, so the list will show only current instead of all historical courses and session.

Donations

Search Builder can now find contacts who made donations that had no fund specified.

The Detail report in the contacts list no longer shows cancelled donations.

Memberships

When a new membership record is created, its payment date is not automatically filled in.

Payment Security

Sumac no longer ever stores CVV2 values in payment transactions. Storing them used to be optional, but payment software security standards forbid saving these values. Although they are not saved into the database, these values *can* be entered in a payment dialog, to provide extra security when processing a payment.

Reminders

Sumac Reminders now integrates with other calendars (e.g. Outlook, Google Calendar, iCal). This is done by exporting and importing calendar entries using the standard .ics file format.