SedonaDocs Overview & Topics

SedonaDocs is an add-on module that must be purchased to be able to attach or scan and attach documents in various areas of the application. This feature was designed to assist companies in going "paper-less" within their office environment as it applies to SedonaOffice practices. Once documents are attached in SedonaOffice, Users are able to view the documents within the SedonaOffice application at their workstation. This makes the workplace more efficient in that employees do not need to leave their workspace to locate paper documents that need to be viewed.

Documents are stored on a file server and managed through SQL Server. When a document is attached in the SedonaOffice application, the actual file is stored on the file server and a link is created in the area of the application where the document was attached for future retrieval.

SedonaOffice customers subscribing to SedonaDocs are able to attach an electronic file to a Customer, Site, System, Service Ticket, Job, Inventory Part, Vendor, Purchase Order, Part Receipt, an A/P Bill, or an Employee record (SedonaSetup).   The most common file type used, is the .pdf format.

General documents may also be saved to the Documents list which is accessed from the main application module tree. These types of documents are typically company policies and procedures or other company related documents.

Documents that are attached in any area of the application are controlled by a Security Level. When a document is attached, the User must select a Security Level for the document. Each User logging into the SedonaOffice application is linked to one or more User Groups that control the User permissions to functions and reports within the application. Each User Group is assigned a Security Level; this controls which documents the User will be able to view.

There are three available Security Levels:

- 1 is the lowest level which is for general access
- 2 is for a medium level of restricted access
- 3 is for management level

For example, if a User's User Group is assigned a Security Level of 3, the User will have access to all documents saved with a Security Level of 3 or lower. If a User has a Security Level of 2, and saves a document with a Security Level of 3, once saved, that User will not be able to see the document.

SedonaDocs Implementation Plan

Prior to implementing SedonaDocs, written policies and procedures should be established by your company and communicated with all SedonaOffice Users who will be using SedonaDocs.

Things to Consider

File naming conventions – It is important to establish a policy on naming document files so that all Users are using the same methodology.

Document Security Level assignment – Establish a chart illustrating document types and which Security Level should be assigned for the document type.

User Group Security Levels – For well-established SedonaOffice customers, you may have to re-design User Group Security. Since multiple Users may be assigned to the same User Group but you may want different security access for different Users for viewing documents, you may need to make changes to your setup.

User Group Security Permissions – Make certain only the Users which should have access to attached documents have Document security permissions. There are two important security options available for SedonaDocs: Delete Documents and Edit Documents. These two security options are typically reserved for management level Users.

Document Types – Document Types is a setup table located in SedonaSetup. Make certain entries are made into this setup table for each type of document that may be attached. The Document Type is a required field when scanning in or attaching a saved document. New Document Types may be added to SedonaSetup at any time.

File format to use when scanning documents – If your company has purchased the SedonaDocs Scanner Interface, Users will be able to scan and save documents from the SedonaOffice application. Two file formats are available: pdf and tif. The file format used is strictly the preference of your company; for consistency purposes, one format should be used by all Users scanning and attaching documents.

Viewing Software – If your company will be saving scanned documents using the pdf format, make certain User workstations have the appropriate software installed to be able to open and view documents saved in this format.