SedonaDocs Overview and Topics

SedonaDocs is SedonaOffice 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 for attaching documents, 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.

Please refer to the links below for other SedonaDocs topics.

- SedonaDocs Implementation Plan
- General Documents
- Customer Explorer Documents

- Ticket Documents
- Job Documents
- Vendor Documents
- Propsect Documents
- Employee Documents
- Part Documents
- Part Receipt & PO Documents
- Vendor Bill & Vendor Credit Documents