

SedonaDocs Implementation Plan

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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.