SedonaSetup - OP - User Groups

A User Group is a means to grant individual Users privileges to certain functions and features within the SedonaOffice application. User groups are usually created for various departments who will need access to different modules depending on the employee job function.

If a User has a unique job function, you may create a User Group for just one User.

This setup form is divided into two forms; Application Access and Report Access. If you want the Users assigned to the User Group to be able to generate reports from the Report Manager, you may select which reports will be available to the User Group.

When setting up your Users, each User may be linked to one or more User Groups.

Application Access form

This setup form is divided into two tiers. First you will create a name for a User Group, and then you will check each box next to the function within each module to which the user group will be permitted access.   For definitions of each Application Access Option please download the User Group Security Planning Worksheet from the SedonaOffice website.

- Code – Enter the code for the User Group. This may be an abbreviation or the full name (up to 25 characters) for the User Group. Example: Admin. Asst.

- Description – Enter the description for the User Group. You may enter up to 50 characters in this field. Example: Administrative Assistant.

- Level – There are three choices to select from in this field; 1-General Access, 2-Some Restricted Access and 3-Management Access. This security level is used with SedonaDocs, Ticket Notes and Job Notes. For example, if a User enters a Note into a Ticket and sets the security level of the note to a level 3, only Users assigned to a User Group of 3 will be able to see the note.

- Credit Memo Limit – This field is only used if your company has activated Credit Request Processing. A User assigned to a User Group with a Credit Memo Limit will only be able to approve a Credit Request that is less than or equal to the limit.

User Groups Application Access

Check the box to the left of each permission the User Group will have access.

User Groups Report Access

Check the box to the left of each report to which the User Group will have access.

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