

# Report Manager Overview and Topics

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This topic section will describe the Report Manager, the permission requirements to use the Report Manager, and folders grouped by each Module with definitions of each report available within the SedonaOffice application.

The Report Manager provides access to a list of pre-designed reports for various areas of the application. Access to the Report Manager is controlled by User Group Security as well as which reports are available to the Users linked to the User Groups.

□ Report names followed by an asterisk (\*) were custom designed by a specific SedonaOffice Customer to meet a particular set of specifications. Changes to these reports may not be made without the prior consent of the customer that commissioned SedonaOffice for the report design. All customers may use any of the custom reports at their own risk.

Reports definitions in this section are grouped by the application module names; Client Management, Accounts Receivable, General Ledger, Accounts Payable, Job Management, Inventory, Service and Sales Management. Also available are List Reports; the List Reports are listings of values in many of the SedonaSetup Tables.

To advance to a certain type of report, click on the links below.

[AP - Accounts Payable](#)

[GL - General Ledger](#)

[SM - Sales Management](#)

[AR - Accounts Receivable](#)

[IN - Inventory](#)

[SV - Service](#)

[CM - Client Management](#)

[JM - Job Management](#)

[List - SedonaSetup](#)

The Report Manager form is divided into two sections; on the left are radio buttons for selecting a Module Name and on the right is the Report List area. The Report List area may be sorted by Report Name or Type. The two characters in the Type column indicates the module to which the report is associated.

When Report Manager is first opened, all reports for all modules to which a User has permissions are listed. If a Module button is selected on the left, only the reports associated with the selected module will be displayed on the right.

The Description column provides a brief description of the report. This Help tool provides more in-depth information for the report and samples of the report output.

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#### **User Group Security - Application Access**

For a User to have access to any reports, the User's User Group must have the Report Manager permission granted.

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#### **User Group Security - Report Access**

For a User to have access to any reports, the User's User Group must have the Report Manager permission granted (see above) and have reports selected on the Report Access tab of the User Group. Only the reports selected on the Report Access list will be available to the User(s) assigned to the User Group.

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