

SedonaSync Project Management Process

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Purpose

The purpose of this document is to outline the steps required for PMO resources to deploy SedonaSync standalone projects, as part of a new customer implementation, add-on module project, or license change for SedonaSync.

It does not include the steps required by the installation tech or consultant delivering training or event configuration services. Please refer to those departments for detailed information on those areas.

What is SedonaSync

SedonaSync is an OEM version of Knowledge Sync, an add-on module developed by Vineyardsoft, a subsidiary of ECI Software Solutions. In its simplest form, it uses events to trigger activities either within other software or sends automated emails or reports based upon an event trigger. The events will look for a condition in a database and then perform an action based on that event. Examples:

- When a sales order is received over x dollars, send an email to the President of the company
- At X time each day, send a report for all quotes closed to a specific person or group
- When x happens in a database, update database table x, field x, with x information

SedonaSync does come with an event pack with the most common events a Bold Group customer would use. Additional events can be configured at an additional service rate.

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Important Notes

Below are some important items to remember when working with SedonaSync:

- Any net new SedonaOffice sale:
 - Requires SedonaSync version 10 and will be Enterprise Webcaster
 - Will include 1 database and within that database can have multiple companies
 - A database connection is an application, not each application database
 - Examples of database connections: SedonaOffice, Manitou, Stages, SFDC, etc.
 - Example of companies for the SedonaOffice database:
 - SedonaOffice Live1
 - SedonaOffice Live2
 - SedonaOffice Sandbox database
 - Example of companies for Manitou
 - Manitou Live1
 - Manitou Sandbox Database
 - SedonaOffice database connection can include more than one company, but number of companies must be noted when requesting the license
 - Example: 1 Database: SedonaOffice 2 companies: Company A Live and Company B Live
 - Will include 1 client connection. Additional will be noted on the sales quote and number purchased included in the information when requesting the license
- Upgrading from V9 to V10 is free, as part of their support/maintenance agreement.
 - Upgrades will take additional time and will be quoted with additional services time
 - Upgrade issues for canned events will be covered as part of the upgrade unless the canned event is modified. Modified canned events and custom events are not covered under maintenance and support. Work on these events will require additional hours quoted
- Customer using OPT services must make OPT aware of any migration from V9 to V10 PRIOR to the upgrade occurring
- For test server setup (used to migrate to a new server), a temp license must be requested from ECI. The temp license will be turned off when the new server is live. Follow the same steps as for [Managing Projects for Add on Databases Licensing](#)

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Managing Projects for New Deployment

Follow the steps below:

1. Confirm customer is on the latest version of SedonaOffice
2. Send customer Kick-off email
 - a. Use template 'SedonaOffice Add On module - with Checklists Attachments'

- i. Remove all Preinstall checklist for non-SedonaSync products
 - i. Cloud: [SedonaSync Pre-Install Check List \(Cloud\)](#)
 - ii. On Prem: [SedonaSync Pre-Install Check List\(On-Prem\)](#)
3. Confirm Preinstall checklist has been received and review for any missing information
4. Schedule an appointment with System Tech to request license from ECI
 - a. Include name of customer's server
 - i. Important Note: Server name can only be 15 characters long
 - b. Include note for number of database connections (qty listed in sales quote for SedonaSync)
 - i. If more than one listed, provide databases to be connected
 - i. Example: SedonaOffice, Manitou, Stages, SFDC, etc
 - c. Include note for number of companies to be connected
5. Schedule appointment with System Tech to install at least one week after license request task and after preinstall checklist has been received/reviewed.
 - a. Duration will be 4 hours (both cloud and on prem installs)
 - b. No SedonaOffice down time.
 - c. Include the following information in the Chatter section of the task:
 - i. Customer contact information
 - ii. Number of SedonaOffice databases
 - i. If more than one list:
 - i. Example: i.e. Manitou, Stages, SFDC, etc
 - ii. Number of Admin users (from checklist)
6. Schedule Technical Consultant (if purchased) for training and configuration of events (note, quote may not include training, see No Training Purchased section for details to provide customer training info in this case).

a. Include the following notes in the Chatter section of the task. This info is same info provided to tech for license/install. You may have to email the information to any resources delivering services that do not have access to Salesforce:

i. Customer contact info

i. Name

ii. Email

iii. Phone

iv. Location

ii. Licensing software

i. Number of database connections

ii. For more than one connection list all connections:

i. Example: i.e., Manitou, Stages, SFDC, etc

iii. Number of Admin users (from checklist)

iv. Installation of Software

i. Cloud based - provide customers SedonaOffice URL

ii. On Premise – provide customer contact info with IT contact (internal contact or external IT firm should be noted)

iii. Name of main user or users being trained on SedonaSync

iv. Number of Hours approved for consulting/training

b. No Training Purchased - if quote does not include training, provide the customer with the following information with Kick Off call/email. Customer should review the following prior to their first session with consultant:

i. Training includes guides and on demand pre-recorded training videos as per the contract details. The following resources are available on BoldU for you to review. Please review this material PRIOR to your first session with our consultant. If you would like additional training, please reach out to your

sales rep to purchase training time.

7. For cloud customers only, the day prior to the first session with the Technical Consultant, schedule the System Tech for 30 minutes to confirm access for the Technical Consultant and customer's user access

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Managing Projects for Add on Databases Licensing

Follow the steps below for projects for Add on Database projects:

1. Confirm customer is on the latest version of SedonaOffice
2. Ask the customer for the following information if not provided in the project hand off information from sales:
 - a. Current SedonaSync version they are on - 9 or 10
 - i. Webcaster version or not
 - ii. Tech will have to have a call with the customer to validate if we cannot determine
 - b. Are they using OPT? If so, they will need to contact OPT to confirm timing of the upgrade from V9 to 10 if upgrade is included in the project
3. Schedule appointment with Installation Technician to request a license from ECI
 - a. Include name of customer's server
 - i. Important Note: Server name can only be 15 characters long
 - b. Include note if license is for webcaster or not
 - c. Include note if licenses are v9 or v10
 - d. Include note for number of Sedona office databases being added
 - e. If additional application databases included list those as well
 - i. Example: i.e., Manitou, Stages, SFDC, etc
4. Schedule appointment with tech to install - one week later
 - a. Include customer contact

- b. Include note if license is for webcaster or not
 - c. Include note that Customer has SedonaSync - this is just license upgrade
 - d. Duration: 2 hours
 - e. If upgraded to v10 from V9 is included duration is 8 hours
5. Schedule Consulting appointment and include following notes:
- a. Licensing software
 - i. One database or multiple databases?
 - ii. One admin user or multiple users?
 - b. Installation of Software
 - i. Cloud based
 - ii. On Premise – requires contact with IT contact (internal contact or external IT firm should be noted)
 - c. Name of main user or users being trained on SedonaSync
 - d. Number of Hours approved for consulting/training requested

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Managing Projects for V9 to V10 Upgrades

The following steps are required to upgrade a customer's SedonaSync application from V9 to V10:

1. Discuss events -
 - a. inform customer: Only canned events purchased and installed will be covered under maintenance/support if issues arise post upgrade
 - i. Any custom events or canned events that have been modified are not covered under the scope of the project unless specifically outlined. Issues post upgrade will require additional services time to resolve
 - b. OPT events should be upgraded by OPT

- i. Customer to coordinate timeline with OPT
2. Schedule appointment with Installation Technician to request license from ECI
 - a. Include name of customer's server
 - i. Important Note: Server name can only be 15 characters long
 - b. Include note if license is for webcaster or not
 - c. Include note if licenses are v9 or v10
 - d. Include note for number of Sedona office databases being added
 - e. If additional application databases included list those as well
 - i. Example: i.e., Manitou, Stages, SFDC, etc
3. Schedule appointment for Installation Technician - 4hours
 - a. Technician to backup the existing SedonaSync database and install V10, then restore database
4. Schedule Technical Consultant to upgrade SedonaSync Events
 - a. Time will depend upon scoping done during sales process on number events that need to be updated

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Revision History

Revision History

8/18/2023 - JMK updated resource name from Installation Tech to System Tech, added task for System Tech for 30 minutes before Technical consultant first session to verify access for Technical Consultant and customer users per request of System Tech

2/7/2023 - JMK - Updated install section to include new kick off template [SedonaOffice Add On module - with Checklists Attachments](#). Updated Upgrade section to include discussion with customer on what events are covered by maintenance/support post upgrade if any issues arise

1/31/2023 - JMK Update all license request tasks to include note for server name - which can only be 15 characters long when requesting license

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