

Sedona-X Mobile Additional User License Implementation

01/04/2024 10:46 am EST

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Purpose

This document walks a Project Manager (PM) through the steps necessary to implement the purchase of additional user seats for Sedona-X Mobile

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Prerequisites

Although the installation is quick, the customer will need to exit SedonaOffice during the installation time for approximately 30 minutes.

Review the sales order to confirm the number of licenses sold. If any questions on the quantity sold, contact the sales rep on the Opportunity.

Important Note: Add-on licenses must be delivered within 4-5 business days

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Implementation Steps

The following steps are used to implement the new licenses:

1. Confirm if the customer is Hosted or On-Prem
2. Confirm customer is on the latest version of SedonaOffice
 - a. If on an older version, time to update SedonaOffice will need to be included
 - b. Estimated time: 30 minutes
 - i. The customer will be down during this time

3. Confirm customer has the API installed and it is the latest version

a. If API is in place

- i. Current version – no additional install time required
- ii. Not current version – include upgrade time required
 - i. Estimated time: 30 minutes
 - i. The customer will not be down during this time

b. If no API is in place

- i. Confirm API was included in the sale refer to [API Information and Installation Process](#)
 - i. Include time for API installation on the install task
- ii. If not included in the sale, contact the sales representative on Opportunity

4. Schedule license installation with Install Technician

a. Install items

- i. SedonaOffice and API are at current version Estimated Time: 30 min
 - i. Can be done at the same time as other tasks, tech can multitask this item
- ii. SedonaOffice requires an upgrade – add 30 minutes
- iii. API requires an upgrade – add additional 30 minutes
- iv. API requires installation
 - i. On-prem – 6 hours
 - ii. Hosted – 2 hours

b. Update task Chatter to include information on what is being installed, the quantity of licenses, and include any preinstall checklists

c. Do not change the task status to 'Scheduled' until the customer confirms the time

5. Send Kick off email to the customer

- a. Template: 'SedonaOffice Licensing'
 - i. Update template to include scheduled technician date and time

6. The customer confirms install time

- a. Update install task status to 'Scheduled'
- b. Update task description to include install time in technicians time zone
- c. Create an Outlook appointment in the Bold Project Management calendar for the technician and the customer
 - i. Included details of what will be installed
- d. If the customer does not confirm the time before the scheduled date, reschedule the task for the technician and resend the kick off email with the new date/time

7. Technician completes installation

- a. The technician will enter a timecard on the task, add notes on completion in Chatter and mark the task complete

8. PM completes the project

- a. Mark all tasks complete
- b. Update Project Stage to 'Complete'

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