

Dashboard 2.0 Install complete

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SedonaDashboard has its own set of permissions for the built in reports/views. These are handled by the SedonaDashboard Permissions Utility, which is installed on the SQL server and may be installed on any machine with a SedonaOffice client (installer is in the SedonaOffice Installation Files shared folder). The installer and tool itself are pretty straightforward. By default, only the default Administrator user within SedonaOffice will be able to login to the permissions utility (you can grant other groups the Admin Tools permission via the utility to allow others access). You log into the utility with a SedonaOffice username and password and then select which company (from those Dashboard is set up on) to edit permissions for. Then you select a user from the list in the top left. This will display their effective permissions to the right and their groups below. Selecting a group will then allow you to check/uncheck permissions to assign that group. If you have any questions, we can go over the utility via LiveAssist.

Cloud:

SedonaDashboard has its own set of permissions for the built in reports/views. These are handled by the SedonaDashboard Permissions Utility, which has been added to the portal. By default, only the default Administrator user within SedonaOffice will be able to login to the permissions utility (you can grant other groups the Admin Tools permission via the utility to allow others access). You log into the utility with a SedonaOffice username and password and then select which company (from those Dashboard is set up on) to edit permissions for. Then you select a user from the list in the top left. This will display their effective permissions to the right and their groups below. Selecting a group will then allow you to check/uncheck permissions to assign that group. If you have any questions, we can go over the utility via LiveAssist.