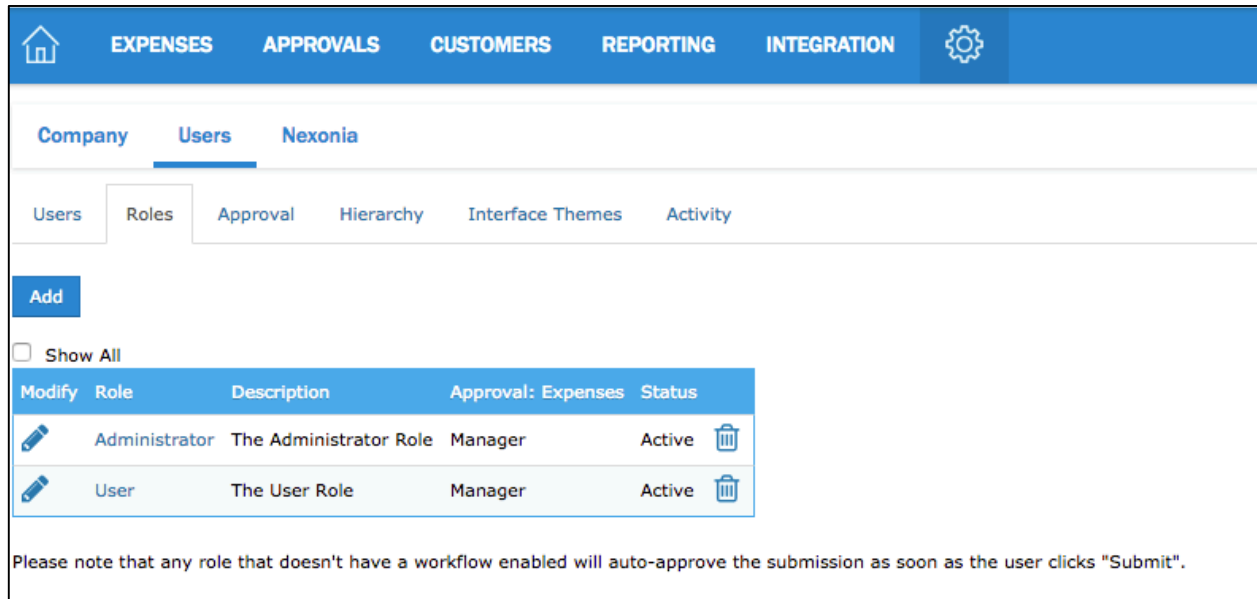


ROLES AND USER PERMISSIONS

Roles control the access for a Nexonia user - what modules can they access, what read and edit permission they may have, which approval process should they be routed through. You could also use the role and filter which expense categories a user group “role” would have access to. Each User record requires a Role.

Roles are found under Settings > Users > Roles.



Modify	Role	Description	Approval: Expenses	Status
	Administrator	The Administrator Role	Manager	Active
	User	The User Role	Manager	Active

Please note that any role that doesn't have a workflow enabled will auto-approve the submission as soon as the user clicks "Submit".

When you create a Nexonia account, it's created with the default Administrator and User roles. You can modify these roles and create new roles, such as a Manager role with enhanced permission, a Finance User with limited administrative permission or a Reporting role with full reporting permission.

Note: you do not have to create a specific role for approver. The permission to approve expenses is driven by the approval process.

- To modify a role, click on the **Modify** (pencil) icon to the left of the Role name.
- To create a role, click the **Add** button.

We'll go through the settings for roles, and cover some specific role permissions you may want to create.

ROLE CONFIGURATION

Roles have 4 tabs to them:

GENERAL SETTINGS

The screenshot shows a web interface for configuring a role. At the top, there are tabs for 'Users', 'Roles', 'Approval', 'Hierarchy', 'Interface Themes', and 'Activity'. The 'Roles' tab is selected. Below this, there is a sub-tab for 'User'. Underneath, there are four sub-tabs: 'General', 'Access Levels', 'Cutoffs', and 'Approvals'. The 'General' sub-tab is active. The form contains the following fields:

- Role Name:** A text input field containing 'User'.
- Description:** A text area containing 'The User Role'.
- Interface Theme:** A dropdown menu showing 'Company Default'.
- Don't show "Approve" and "Reject" in the approvals report listing:** A checkbox that is currently unchecked, with the text 'in Expense approval report listing' below it.
- Status:** A dropdown menu showing 'Active'.
- Reassign Approval Enabled:** A dropdown menu showing 'No'.

At the bottom left of the form is a blue 'Apply' button.

Role Name: name of role

Description: description of role

Interface theme: you can link the role to a specific interface theme. This way, you could create different interface themes to reflect specific branding or labels you want for a specific group.

Don't show "Approve" and "Reject" in the approvals report listing: this changes the Approval module for this role so that they don't see the default Approve or Reject buttons at the Pending Approvals Queue level – this means they can't do a quick approval, they must open the report and approve or reject from within the report. This would be used if you want to ensure approvers are opening and reviewing the items within the reports.

Reassign Approval Enabled: allows users with this role to reassign submitted expenses that are pending their approval to a different approver.

ACCESS LEVELS (PERMISSIONS)

The Access Levels tab controls what the system permissions are for this role.

The screenshot shows the 'Access Levels' configuration page for the 'User' role. The page has tabs for 'Users', 'Roles', 'Approval', 'Hierarchy', 'Interface Themes', and 'Activity'. Under 'Roles', there are sub-tabs for 'General', 'Access Levels', 'Cutoffs', and 'Approvals'. The 'Access Levels' section is divided into 'Features' and 'Configuration'.

Features	Self	Subordinates	Project Team	Regions	All Users
Expense Reports	Edit	Read	None	None	None
Approval	Edit	Read		None	None

Configuration	Access Level
Customers & Projects	<input checked="" type="radio"/> None <input type="radio"/> Read <input type="radio"/> Edit
Manager (Project)	<input checked="" type="radio"/> None <input type="radio"/> Read <input type="radio"/> Edit
Users	<input checked="" type="radio"/> None <input type="radio"/> Read <input type="radio"/> Edit
Company	<input checked="" type="radio"/> None <input type="radio"/> Read <input type="radio"/> Edit
HR Data	<input checked="" type="radio"/> None <input type="radio"/> Read <input type="radio"/> Edit
Reports	<input type="radio"/> None <input checked="" type="radio"/> Run <input type="radio"/> Design <input type="radio"/> Share
Integration	<input checked="" type="radio"/> None <input type="radio"/> Read <input type="radio"/> Run <input type="radio"/> Edit
Can manage ship-tos:	<input checked="" type="radio"/> None <input type="radio"/> Edit

An 'Apply' button is located at the bottom left of the configuration section.

Features controls which modules this role can access and what permission they have. Above, we see the default for the User role.

Permission can be:

None - no permission

Edit - this means they can use the module

Read - this is Read Only permission. This means you can see information but not alter it. This can be useful as Read Only information can be pulled into the Reporting tool.

In this example, this role can create Expense Reports for themselves, and has Read Only permission to view their subordinates in the hierarchy.

Under **All Users** there is an extra permission available: **Administration**. This would grant this role Administration rights. **THIS SHOULD BE GIVEN SPARINGLY**. This permission allows this role to modify items regardless of their status and bypass any policy rules in the system, such as submit blockers.

Note: Approvers only need an **Approval: Edit** permission to access the Approvals module and approve items assigned to them for approval. So, the default **User** role here would work for both expense report submitters and approvers.

Configuration are administrative permissions, or ones share with enhanced users, such as a Finance Administrator or Reporting user.

Customers & Projects: access to the **Customers** module – **Edit** would mean this role can create new customer and projects

Manager (Project): access to Projects within the **Customers** module, but only for those projects where the user is listed as the Project Manager within the project record.

Users: access to the **Users** tab (Users, Roles, Approval) within the Settings.

Company: access to the **Company** tab (Features, Expenses, Notifications, Financial) within the Settings.

HR Data: access to see and edit any User custom fields marked as “HR Data”.

Reports: access to the Reporting module. The permissions are:

None: no access to the Reporting module

Run: access to the Reporting module, but can only run existing report templates

Design: access to the Reporting module, and can run reports and design their own reporting templates

Share: access to the Reporting module, can run reports and design their own reporting templates, as well as share reporting templates with other users.

Note: this setting controls access to the reporting tool. The data that can be pulled in the reports is controlled by the permissions in the above **Features** section. So, if this role needs to run reports for everyone’s data, they’d need **All Users – Read** permission as well.

Integration: access to the Integration module where the credit card and export integrations are

None: no access to the Integration module

Read: access to the Integration module, but Read Only permission.

Run: access to the Integration module and can run any integrations, such as the export generation.

Edit: access to the Integration module and can run any integrations, as well as modify any integration settings.

Can manage ship-tos: not relevant to Expenses, leave at “None”.

SPECIAL ROLE CONFIGURATIONS:

Finance:

Section	Setting	Permission
Expense Reports/Approvals	All Users	Read
Configuration	Company	Read or Edit (if they need to be able to modify expense policy rules or link credit cards to users)
Configuration	Reports	Design, or Share (full permission)

Reporting:

Section	Setting	Permission
Expense Reports/Approvals	All Users	Read
Configuration	Reports	Design, or Share (full permission)

Human Resources:

Section	Setting	Permission
Configuration	Users	Edit
Configuration	HR Data	Edit

Project Managers:

Section	Setting	Permission
Expense Reports	Project Team	Read
Configuration	Manager (Projects):	Edit
Configuration	Reports	Design, or Share (full permission)

Auditor:

Section	Setting	Permission
Expense Reports/Approvals	Self	None
Expense Reports/Approvals	All Users	Read
Configuration	Reports	Design, or Share (full permission)

CUTOFFS (LOCKOUT PERIODS)

Cutoffs can be configured if you want to prevent the creation of expenses older than a particular period.

The screenshot shows the 'Users' configuration page for 'Nexonia'. The 'Cutoffs' tab is selected, showing a table with columns for 'Feature', 'Active', 'Lock', and 'After'. The 'Expense Reports' feature is active, and the 'Lock' is set to 'Previous' and 'After' is set to '10'. A dropdown menu is open, showing options: 'Business Day(s)', 'Calendar Day(s)', 'Week(s)', 'Month(s)', 'Quarter(s)', and 'Year(s)'. The 'Business Day(s)' option is selected.

Choose the lockout period and when it will be effective. In our example, we set a rule that expenses can't be older than 10 business days old.

Below, is what a user would see if they tried to draft an expense earlier than the cutoff.

The screenshot shows the 'Item #1' expense entry form. The form includes fields for 'Project' (Clone - Sample Project), 'Category' (Meals), 'Transaction Date' (11/09/2016), and 'Receipt' (Yes). The total amount is 22.29 USD. An error message is displayed in a blue box: 'Error: No expense entries incurred before 12/08/2016 can be submitted, please contact your administrator.' The error message has an 'OK' button. The form also has 'Cancel', 'Save and New', 'Save and Copy', and 'Save and Close' buttons at the bottom.

APPROVALS (ROUTING)

This tab is used to set which approval process should items be submitted through for this role.

If you only have one approval process set, it would be the default. But if you had different approval processes for different modules or groups, you could set the workflow here.

Process	Submission Comment	Approval	Submission Prompt
Expense Reports	<input checked="" type="radio"/> None <input type="radio"/> Optional <input type="radio"/> Required	Manager	

Submission Comment: if you require a comment upon submission of the expense, you can make it optional or required.

Approval: which approval process should this role be routed through

Submission Prompt: If you want a message shown to the users before they click “OK” to submit, you can enter that text here. For example: “By submitting this expense report, I acknowledge...”