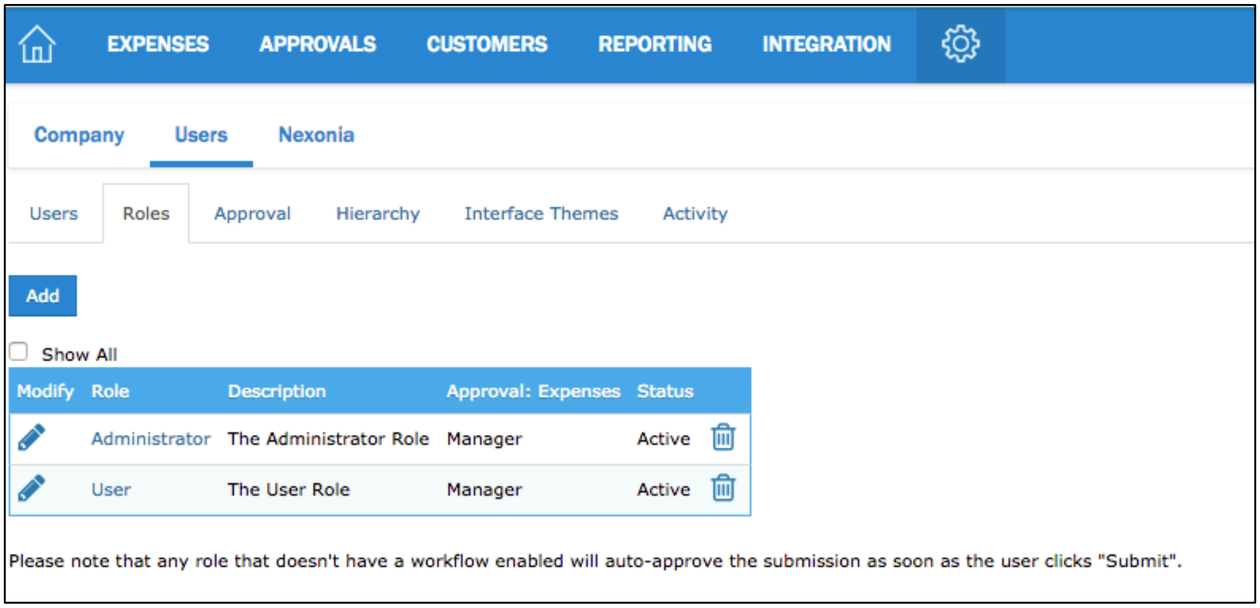
# ROLES AND USER PERMISSIONS

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.




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.

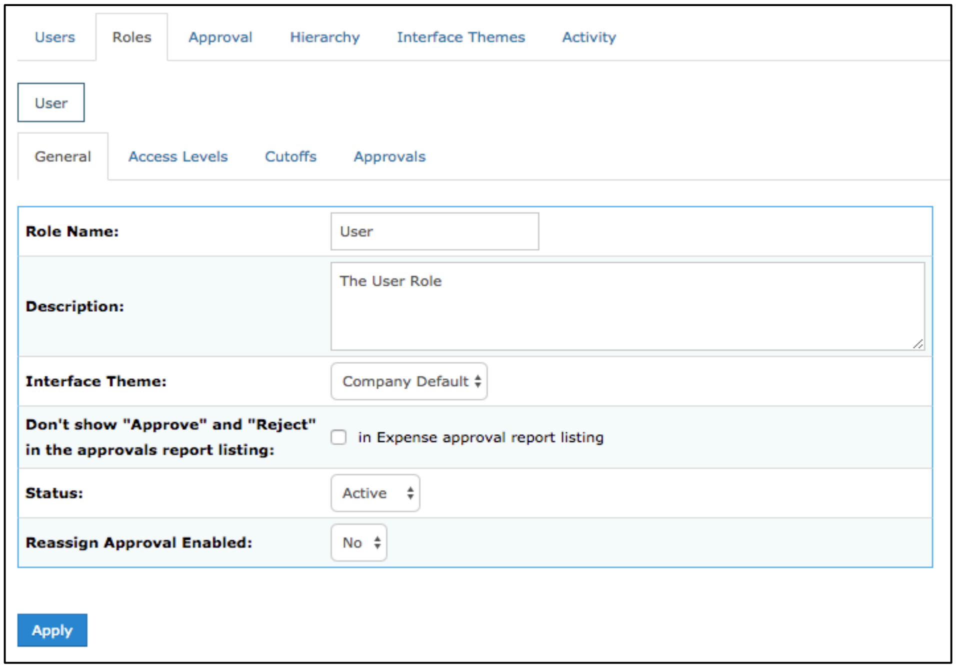
- To modify a role, click on the **Modify** (pencil) icon to the left of the Role name.
- To create a role, click the **Add** button.

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




**Role Name:** name of role

**Description**: description of role

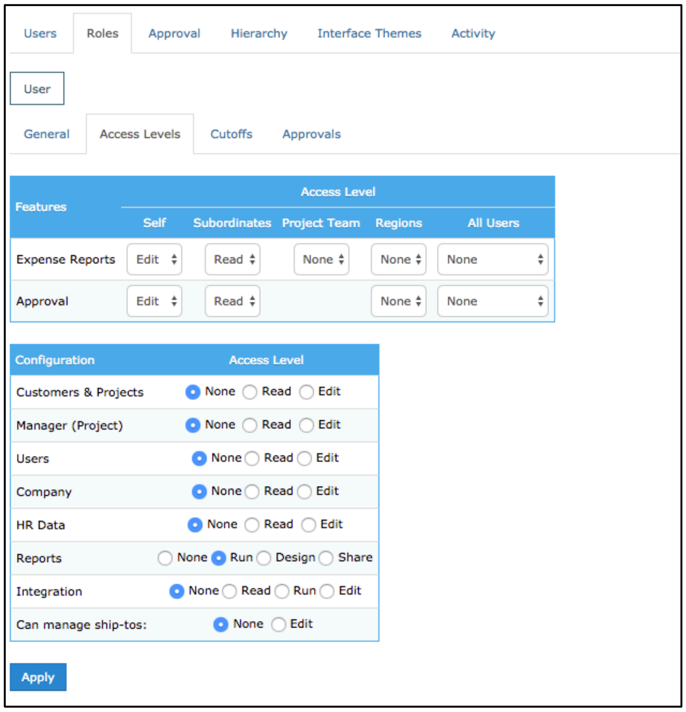
**Interface theme**: you can link the role to a specific interface theme. This way, you could create different interface themes to reflect specific branding or labels you want for a specific group.

**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.




**<u>Features</u>** 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:**

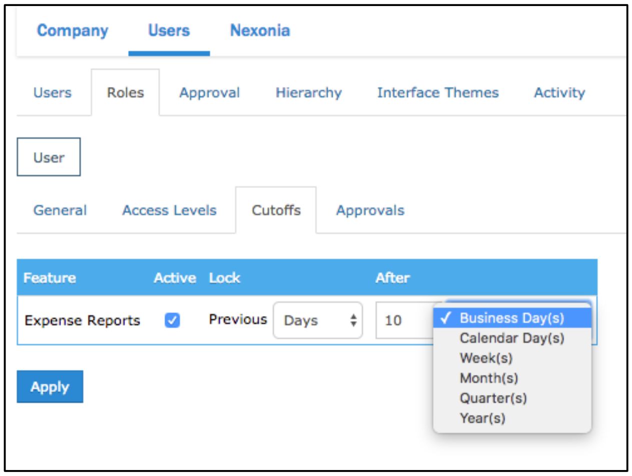
| Section | Setting | Permission |
|---|---|---|
| **Expense Reports** | Project Team | Read |
| **Configuration** | Manager (Projects): | Edit |
| **Configuration** | Reports | Design, or Share (full permission) |

**Auditor:**

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

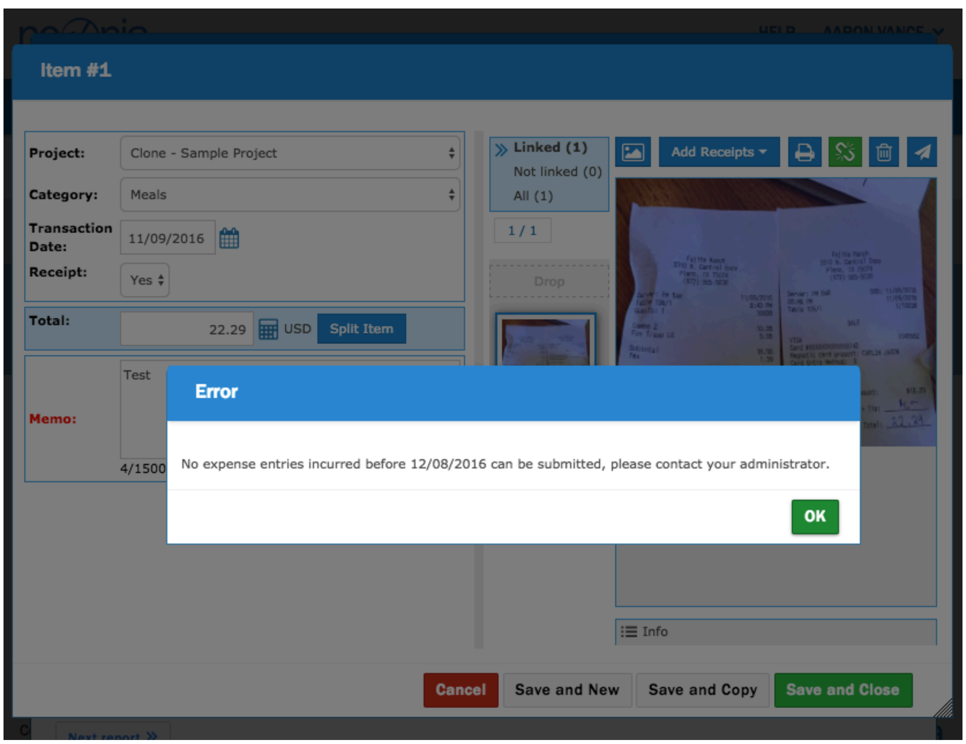
## CUTOFFS (LOCKOUT PERIODS)

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




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.

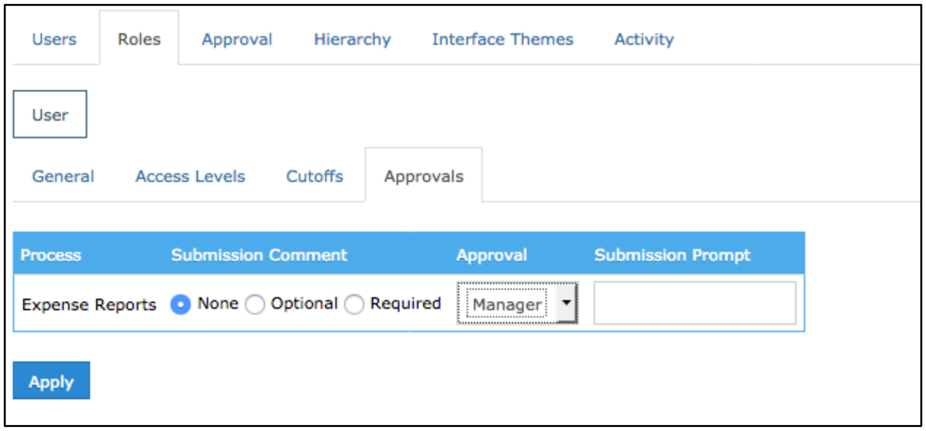
Below, is what a user would see if they tried to draft an expense earlier than the cutoff.



## 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.




**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…”