Trust us, we've seen it all here. Here, find some tips from our team to facilitate your own, and best, training on Nexonia!

GETTING READY

How many employees? If over 50, think about more than one session to accommodate different schedules. For a large employee base, consider utilizing a "power" group of users – employees tasked with becoming experts to train and support the larger group.

Who needs to be trained? If it is just administrators, you can cover that in one session. If end users, perhaps split up sessions on how to login/submit their first expense report, and how to review/approve at a different time.

Will everyone have access at the time of training? We often find you can go in two directions:

- Watch & Listen
- Watch & Practice

We recommend separating the formal instruction from the practice time. This allows everyone to receive the same message without going off track. Then, schedule a separate workshop for others with you to practice and ask questions.

When do we need to train? We always encourage planning ahead for training – however, remember things can change when implementing. Something might take longer than expected, requirements may change, and/or your organization may decide to purchase an add-on product. Have a solid plan but try to keep some flexibility in timing. Always wait to train until configuration is completely done. We recognize there can be pressure to go-live by a certain date, but we advise to prioritize employees' adoption success as well.

Require Training

Often, the amount of training that one receives can make or break their success with new software. A user may have very simple questions, but a negative reaction on the system as a whole; therefore, deterring them from even trying to use it correctly. Require that they attend your training, send them all the resources you can find, and follow-up. Let them know where they can find support after you are finished.

Define and Communicate T&E Policies Early

Nexonia will be new to everyone, so define your policies early to limit questions. Keeping questions related to the software will help keep the group focused.

Prepping the Material

Submitting & Approving Expenses Prep:

- Add a meal, taxi, and hotel receipt to Unfiled Expenses
- Submit a couple expense reports in the order below:
  - o Credit card charge (to show the CC icon and company paid total)
  - o Internet charge (to show Policy warning icon)
  - o Beverage charge with Alcohol memo: Alcohol gift for client (for the Approver to reject)
  - o Airfare charge

Submitting & Approving Expenses Order of Material:

Part 1 (left – right)

Login	Review Dashboard
Account & User Settings	Expenses Dashboard
Review Unfiled Expenses	Mobile App
Reports tab	Add a Report
Add a Report	Use the Unfiled Expenses Tab
Edit a Meal Expense	Review Tips and Attendees
Add a Mileage Expense	Add an Expense from a Card Transaction
Upload and Link a Receipt	Review Emailed Receipts
Split an Expense	Manage Receipts
Submit	Recall

Part 2 (left – right)

Login as Approver	Approvals Dashboard
Review and Expense Report	Review Report Details
Review a Credit Card Expense	Review a Policy Warning (internet expense example)
Enter a Rejection Comment (alcohol expense example)	Approve Remaining Items
Mobile App	Login as Direct Deposit Approver
Review Approvals Dashboard	Direct Deposit Inbox
Review an Expense Report	Buttons: Reimburse, Exclude, Reject

Submitting & Approving Time Off and Timesheets Prep:

- Submit time off requests in previous months
- Submit timesheets with time entries and memos
- Submit and approve/reject Time off for current month
- Submit and approve/reject Timesheets for current month

Submitting & Approving Time Off and Timesheets Order of Material:

Part 1 (left – right)

Login	Account and User Settings
Time Off Dashboard	Views
Summary Box	Request Time Off
Submit	Icon Legend

Part 2

Timesheets dashboard	Create a Timesheet
Submit	Icon Legend
Another Week	Copy Weeks
Recall	Mobile app

Part 3

Login as Approver	Approvals Dashboard
Time Off Inbox	Reject Time Off
Timesheets Inbox	Approve a Timesheet
Mobile app	

ANTICIPATE THE QUESTIONS

Common FAQs

How often do I need to submit a report? Do I have to split out tax on hotel invoices to another category?

Requirements for report submission, policy information, and requirements for expense details are determined internally by your own organization. These are examples of questions that we would refer to be answered by the administrator.

Is there an "auto" merge where Nexonia attempts to match receipts with the credit card transactions or do we have to match each ourselves?

Use the Actions menu and select "Merge with a card transaction" to merge an expense line with a credit card transaction.

Do I need to login separately (have their credentials) into my co-worker's account to create expense reports/items for him/her?

No. If proxying is set up, click on the Expenses tab, and then click on your name in the upper left corner below the menu bar to view a list of users you have permission to proxy for.