Introduction

In this training, we'll be going over some of the basics on how to configure and manage your User Roles in Nexonia. To do this, we'll log in as an Administrator and cover a few areas dedicated to these functions.

Logging In

In order to log into Nexonia, navigate to Nexonia.com and press the "sign in" button in the upper right-hand corner. You'll then populate your login credentials in the "email" and "password" fields and press the green "sign in" button to log into your account.

Home Page

When you first sign into Nexonia, you'll get taken to the home page. Here, you can access all of the modules assigned to you, as well as your personal and company account settings. To access your company account settings, go to the navigation bar at the top and press the little "cog" icon.

Configuring User Roles

If you're not familiar with "roles" in Nexonia, their purpose is to control what kind of access each user has in the system. This applies both to the modules in Nexonia, like Timesheets and Expenses, as well the permissions within each one. Each user must also be assigned to a role in order for them to have the appropriate level of access in the system.

The section that we'll focus on within the configuration tab is: Users > Roles (subheading).

Once you're in this section, any roles that have been previously created will appear in the table below. When your Nexonia account is first created, you'll have a couple standard ones already created for you like the Administrator and User roles. You may also have some custom roles that were created for you during the implementation of your account, but you can create them yourself as well.

To create a new role, click the "add" button on the left-hand side. To edit an existing role, click the "pencil" icon in the table to the left of the role itself.

After clicking the "pencil" icon, you'll get brought to the edit interface where you can configure all of the details pertaining to the role. The subsection that we'll focus on within this tab is "access levels". After clicking on that tab, press "edit" button on the left to open the settings.

The first table in this section, called "features", is where you control which modules each user assigned to this role will have access to. The first column lists out the modules themselves, like Timesheets, Expenses and so on. The associated columns on the right represent five different permission levels related to those modules such as self, subordinate and more.

In a non-administrator role, you'll usually give "edit" access to all users under the "self" column so that they can manage all of their own time and expense data. To do this, click the dropdown menu under the "self" column and select "edit".

In some situations, a role is also given "read" access at the subordinate level. This is most valuable for managers in a user role who would like to see all of the timesheets and expenses from the users that report to them without having the ability to edit that data.

If you're setting up an administrator role, like the one we're in now, you'll see that the role has "administration" access under the "all users" column on the right. This is a standard setup because you want all administrators in your account to have the ability to edit all information related to users and their data.

The next table below is "configuration", which is where you control additional access settings for the role. In an administrator role, all of these settings are set to the "edit" level so that every administrator can manage every list and setting in the account. On the other hand, in a user-focused role, these will all be typically turned off except for "reports". That setting gives users access to the Reporting module in Nexonia. Depending on the option you select, you can give users the ability to run their own reports, design their own or even share them with other users.

The final table at the bottom is "vendors". For administrator roles, each of these settings will be set to the maximum editing capability so that all administrators in your account can add, edit and delete vendors. For user-specific roles, you'll usually only give them the ability to add new vendors for the purpose of submitting invoices or requisitions.

Once you've completed setting up this section, make sure you click the "apply" button at the bottom left to save your changes.

Assigning Approval Workflows to Roles

After configuring all of the settings in your role, the next step is to assign an approval workflow to it. To do this, go to the "approvals" section.

In this section, you'll see all of your respective Nexonia modules listed in the table below. To assign an approval workflow to a module, click on the "edit" button. Next, under the "approval" column in the table, select your desired workflow from the dropdown. The dropdown will show you a list of all the approval workflows you've created in your account. Select the desired workflow and click "apply" to save your changes.

Help & Support

If you'd like to access our Help Center to see all of the articles and videos we have available, navigate to the "Help" icon in the upper right-hand corner of the screen. Clicking this will take you directly to our Nexonia Help Center.

To contact our support team directly, click the "Contact Support" button in the middle of the navigation bar at the top of your screen.

That brings us to the end of our training session. Thank you all very much for watching and enjoy using Nexonia!