



Introduction

In this training, we'll be going over how to set up and maintain your Task Categories and Timesheets Layout 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 where you can access all the modules assigned to you. For administrators in particular, you'll have an additional "cog" icon in your navigation bar at the top. This is where you go to configure and maintain your account settings.

Configuring Task Categories

The purpose of task categories is to track the specific duties that each employee did for each of their timesheet entries. Where you go to set up and manage your task categories is through: Configuration (cog icon) > Company > Timesheets > Task Categories.

One important thing to note is that if you synchronize Nexonia with Intacct or NetSuite, make sure that you create any new task categories in those systems first. Once they're created there, a scheduled integration sync will occur between the two platforms and bring those task categories into Nexonia. Due to this functionality, make sure you don't create new task categories in Nexonia because they will become inactive after the scheduled sync occurs.

If you haven't integrated Nexonia with an accounting platform or simply want to track some information in Nexonia only, you can create task categories manually. You can also edit or clone your existing categories by clicking the "pencil" and "paper" icons, respectively, beside a task category.

To create a new task category, click the "add" button. After pressing "add", you'll get taken to the details interface where you can enter all of the specific information pertaining to the task category.

Starting at the top, you'll need to give your task category a name. Next, make sure that the "status" is set to active so that it will become a selectable option for your employees. Once that's set, map your task category to a GL account. Depending on your integration (or lack thereof), this list may have been synced into Nexonia directly from your accounting platform. The final couple of settings allow you to change whether the time mapped to this category should be tracked in "hours" or "days" and whether the "memo" field is a requirement or not. For those of you creating task



categories to track in Nexonia only, make sure that the “ignore for integration” setting is set to “yes”.

The final portion you can configure is filtering the task category by role to control what kind of users are able to see it. By default, the “all roles” checkbox will be marked off, thereby giving every user access to this task category. If you’d like to limit who has access to it, uncheck the “all roles” box. This will show you your entire list of roles in this table. From there, select the role group(s) that you want to have access to the task category. To finalize your setup, scroll down and hit “apply” to save your changes.

Managing Timesheets Layout

To manage the layout of our Timesheets tab, click on the section called “Timesheets Layout” just beside the “Task Categories” section. This section is where you can configure what columns and fields will be visible and accessible for all of your employees in their “Timesheets” module.

Each of the tables you see correspond with a particular aspect of the interface in that module. For example, the main dashboard when you first click into that section, the pop-up that appears when you select which week to enter time for or the actual timesheet interface where you map all of your hours and relevant information for the week.

To edit the tables, click on the “edit” button on the left-hand side. Simply go through each of the tables and toggle on or off how you want each view to be represented for your employees. Make sure you scroll down to the bottom and click “apply” to save your changes once you’ve finished editing your fields.

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.

A few articles that may be useful to you in relation to the content we covered are: [DCAA Compliance](#), [Setting Quotes for Timesheets](#), [Uploading a Time Policy Document](#), [How to Change the Hour Time Increment in Duration Selection](#), [How to Filter Task Categories by Project](#) and [How to Filter Task Categories by Customer](#).

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 joining and enjoy using Nexonia!