# Introduction

In this training, we'll be going over how to set up and maintain your Time Off Banks and Profiles 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.

# Setting Up Time Off Banks

The "Time Off Banks" section of the "Configuration" tab is where you, the administrator, can manage all of the time off types that are available for your employees when requesting time off. Your existing list will appear in the table below and you can edit or delete any of them using the "actions" button on the left.

To create a new time off bank, click the "add" button. This will open up a pop-up where you fill out some information pertaining to the time off bank.

First, you'll need to give your time off bank a name at the top. Next, in the "defined by" section, indicate whether you want to track time for this bank in days or hours. The "exceeded" checkbox just below, if marked off, will allow your employees to book time off requests using this bank after they have gone over their original allotted number of days. Finally, make sure to leave the "active" checkbox marked off to ensure the bank is selectable by your employees.

## Configuring Accruals in a Time Off Bank

An additional aspect of time off banks that you can configure is an accrual system. To do so, check off the "accrual" box and this will open up an expanded menu in this interface.

The first option lets you set the period for your accrual whether it's earned yearly, quarterly, monthly or another time frame. Down below, indicate the period start date for the accrual using the calendar icon. Along with that, if you have a policy where employees begin accruing time off from their employment date as opposed to the start of a fiscal or calendar year, make sure to set the "first accrual after user start date" dropdown to "pro-rated accruals". Following that in the

"carryover limits" section, state what the maximum number of days an employee is allowed to bring over from a previous period that they haven't used for this time off bank.

Along with those settings, you also have the ability to control how your accruals are earned for each employee. Using the "accrual method" dropdown, your two options for this setup are "mono-tier" and "multi-tier". Mono-tier is the most frequent selection where every employee given access to this time off bank will accrue at the same rate. Multi-tier will set each employee's accrual rates depending on how long they've worked at your company. If you select a multi-tier setup, there will be a section at the bottom for you to enter some coding information to build out the accrual logic for this time off bank. Typically, this is done during your Nexonia implementation, so we recommend reaching out to our support team, your Customer Success Manager or the Nexonia Help Center for more information and assistance.

Once everything is configured correctly in your time off bank, click the green "OK" button to save it. You'll then see that it gets added to the table with the rest of your banks on the left.

## Setting Up Time Off Profiles

Once you've created your time off banks, the next step is to create your Time Off Profiles and add your banks to them. To do this, navigate to the "Time Off Profiles" section.

Time off profiles have two main purposes. First, to group your employees based off of the kind of time off banks that are available to them. Second, to control what kind of time off banks are available to each employee.

While in this section, all of your previously created profiles will be listed in the table below. To edit or delete them, use the "actions" button on the left. To create a new time off profile, click the "add" button. Doing so will bring up the details interface where you can enter all of the information pertaining to the profile.

Just like we did with the banks, the first thing we'll enter is the name of the profile. Next, set how to track time off for this profile in the "defined by" section. It's important to keep this setting consistent among all of your banks and profiles. Then, make sure that the "active" checkbox is marked off. Once that's all set, the next step is to add all of the time off banks that should be part of this profile. To do so, click the "add" button at the bottom of the interface.

As always, make sure you enter in your name at the top and mark off the "active" checkbox. Following those two, your next section is "mode". Mode allows you to control how your employees will see their time off banks displayed in their Time Off module. When you click the dropdown, the three options you have are: "tracked", "banked" and "banked and planned". The best practice is to use "banked and planned" because it's the most transparent for your team. This selection will let your employees see all of the information related to this time off bank including how many days they can take, how many they've booked thus far and so on. The "banked" option won't show the allotted amount for each individual so it's more useful for companies that don't have a strict policy for taking time off. Finally, the "tracked" option is most useful for time off types that don't have a specific allowance that's tracked, like unpaid vacation, for example.

If you select "banked and planned", there will be an additional dropdown menu that appears called "bank". Here, you will see all of the time off banks that were created in the section we previously covered. Simply select the time off bank that you want to add to this profile from the menu. Then, in the "day options" section, select the day options you want your employees to have to select when booking time off with this bank. Your options include a full day, half day and so on. Once everything is checked off, click the green "OK" button to save the bank into this time off profile.

Back in our time off profile interface, you'll see the bank is now added in the pop-up. From there, keep going and add any additional time off banks you want to be associated with this profile. Once complete, click the green "OK" button once again to save the profile. After doing so, your new time off profile will be saved in the table along with your other existing ones.

## Setting Up Holiday Profiles

The final step is to configure your "public holiday profiles" by clicking on the tab with the same name. The purpose of setting these up is for your employees to see their applicable public holidays in their Time Off module.

Just like with our time off banks and profiles, your existing public holiday profiles will appear in the table under the section's title. To edit or delete existing profiles, click the "actions" button and to create a new one, click the "add" button.

First, give your profile a name and then click the "add" button within this interface to enter all of the public holidays. You'll enter the year that these holidays are taking place in and then press "add" again to enter the details of the holiday. In this pop-up, you'll enter in the name and date of the holiday in those corresponding fields. Once complete, press "OK" a couple times and you'll see the holiday added to your profile.

For public holiday profiles in particular, make sure that this is updated on an annual basis so that your employees have the correct information in their Time Off modules.

## 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 couple articles that may be useful to you in relation to the content we covered are: How to Configure Time Off Accruals – Mono-Tier and How to Configure Time Off Accruals – Multi-Tier.

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!