



## Introduction

In this training, we'll be going over some of the basics on how to configure users 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 Profiles

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

Once you enter this section, all of your employees in Nexonia will be listed in the table below. If you sync Nexonia with Intacct or NetSuite, your employee profiles will need to be initially created in those respective platforms and then synced over into Nexonia. If you use a different accounting platform or don't use one at all, you can create and manage all of your employee profiles in Nexonia directly.

To create a new employee, press the "add" button. To manage your existing employee profiles, click the "pencil" icon under the first column in the table next to the employee's name. The "key" icon beside it, allows you to send the user a password reset email if they're having any issues logging in. On the far right, you can check or uncheck the "active" checkbox to control who your active users are. However, if you sync Nexonia with Intacct or NetSuite, this deactivation will need to occur in those platforms first and then you can sync the changes over into Nexonia.

## Editing User Settings

After you click the "pencil" icon, the first area you'll be brought to is the "user settings" subheading. This is where you'll find the basic information for the employee so let's go through some of the most important sections to complete here.

First, you'll have the employee's contact information at the top like email address, first name and last name. Next, you can map the user's home region. Scrolling down further, you can assign the user their specific role in Nexonia to control what kind of access they have in the system. Once that's set, assign the user a manager to approve their time and expense submissions and map a default Customer and Project if it applies to the employee.



An additional setting that's important to point out is "temporary approval proxy". If an employee's manager ever goes away for a period of time, this setting lets you assign a person to be the temporary approver in their place. To do this, select the desired user from the corresponding dropdown and then indicate the period they should be the approver in the "start date" and "end date" sections below.

Whenever you make any changes to user profiles, make sure you always scroll down to the bottom of the page and hit "apply" to save your changes.

## Enabling User Proxying

The next subheading that we'll cover is "proxying". This section is where you can give users the ability to do things on behalf of other users in Nexonia. To configure this, press the "edit" button on the far left.

Upon doing so, you'll open a table on this page. Starting on the left, you have the "name" column which will list all of your employees in Nexonia. The top line in the columns on the right specifies which module you can give the user access to, such as Timesheets, Time Off and Expenses. The line below breaks down the access to permission and notification-based usage. Permission and notification settings each have their own dropdown for each user and module and that's where you manage the proxy access for the employee.

For example, if we want to give Andy access to see all of Angela's timesheets, we'll set the "permission" dropdown under the Timesheets column to "read". This will give him view-only access to her timesheets. Alternatively, if we wanted Andy to have the ability to edit and submit Angela's timesheets, we would select the "edit" option from the dropdown instead.

Once you've configured all of your proxy settings, always remember to scroll down and click "apply" to save your changes.

## Giving Users Access to Projects and Custom Fields

The final two sections we'll cover are "projects" and "custom fields". We'll start with "projects" first.

In this section, you're able to control which Customers and Projects your users have access to when mapping their expenses and timesheets. Similar to the other tabs, all of your existing customers and projects will be listed in the table below. To edit which ones this user has access to, click the "edit" button on the left.

Once you do so, the table itself will open up with some checkboxes on the far left next to each customer and project. To control which one's this user can see, simply check or uncheck each box and then click "apply" at the bottom left to save your changes.

Moving onto the "custom fields" section, you can configure the same thing here except it applies to your custom fields in Nexonia instead. One thing to note is that custom fields will be company-specific. I have "departments" and "locations" in my account but your list will likely look



different depending on your company, the accounting platform you integrate with and the data you track.

That being said, just like with customers and projects, click “edit” on this page to manage the user access to these fields and then save your changes using the “apply” button.

## **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!