



Introduction

In this training, we'll be going over how to assign Time Off Profiles to Regions and Users, as well as how to manage Time Off Banks for individual employees. 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.

Assigning Time Off Profiles

Once all of your time off banks and profiles have been created, the next step is to assign those time off profiles to your employees. This process can be done by assigning them to Regions and then mapping those regions to employees or by applying them to employees directly.

By Region

The first method we'll look at is how to assign them by region. This is the more common approach because it allows you to do it in bulk rather than going one-by-one for each of your employees. To do so, we'll navigate to: Configuration (cog icon) > Company > Regions.

One important thing to note with regions is that if you've integrated Nexonia with an accounting platform, your regions (also referred to as Entities or Subsidiaries) will have already been synced in. This means that you don't have to do any kind of manual creation or configuration for them.

For those of you who have not integrated Nexonia with an accounting platform or would like to create regions manually, you can do so by pressing the "add" button on the left-hand side.

To open an existing region and edit its details, click on the region's name in the table below. This will open several edit tabs but the one we're concerned with is the first tab, "general". We'll then press the "edit" button to make our changes.

Once this interface is open, scroll down to the bottom to find the "time off profile" and "holiday profile" sections. If you click the corresponding dropdown, you'll see a list of all the time off and holiday profiles that have been created in your account. All you have to do is select the applicable



one you'd like associated with this region and then hit the "apply" button at the bottom to save your changes. Once complete, any user that is assigned to this region will have access to the specific time off banks and holidays associated with each profile.

By User

To assign profiles by user, navigate to: Configuration (cog icon) > Users > Users (subheading). The table in this section will list all of the users in your Nexonia account. In order to edit their details, including the time off and holiday profile assignments, click on the pencil icon on the left-hand side next to the user's name.

The first section within the edit interface is "user settings" and that is where you'll want to be to make this change. Once here, scroll all the way down like before and find the "time off profile" and "holiday profile" sections. The default setting is the "region setting" for these two dropdowns. However, if you'd like a user to have access to a time off and holiday profile that is different from the region they're assigned to, simply click each dropdown and select the profile you'd like them to be associated with. Once complete, click "apply" at the bottom just like we did when assigning by region.

Managing User Time Off Banks

Once each employee has a time off and holiday profile assigned to them, the final step is to manage their individual balances for their time off banks. To do this, we'll navigate to the "Time Off" module in the navigation bar at the top left.

In this section, you'll see an overview of each employee's time off banks in the summary box on the left along with the ability to cycle through each employee using the dropdown menu right above it.

To manage each user's time off bank balances, click the "manage banks" button in the upper right-hand corner. This will open a pop-up window where you can cycle through each time off bank you've created in Nexonia and adjust the balances for each employee.

Once you select the desired time off bank from the dropdown at the top, each employee that has access to it will have their name listed below. Along with that, the "days" column on the right will show you the current balance for each employee. If you see a message saying, "not initialized", that means the user doesn't have a balance set up yet.

To add or adjust the balance for an employee, click the pencil icon on the right-hand side under the "days" column. In this pop-up menu, simply enter the amount of days you'd like to give the employee in the "updates" section. Next, enter an explanation for the change in the "memo" field below. This field is highlighted red meaning that it's a required entry in this process. Once that's done, click the green "OK" button to save your changes. After completing this update, the employee's balance will update in the "manage banks" pop-up along with their summary box on the left-hand side.

You also have the ability to bulk edit user balances in this interface. To do this, you'll want to check off the box on the left for each user you'd like to edit. Next, click the "bulk edit" button in the top



right and select “add/remove”. From here, follow the same steps as before where you enter the amount of days on the far right, provide an explanation in the “memo” field and press the green “OK” button 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 joining and enjoy using Nexonia!