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A Training Roadmap to Nexsure

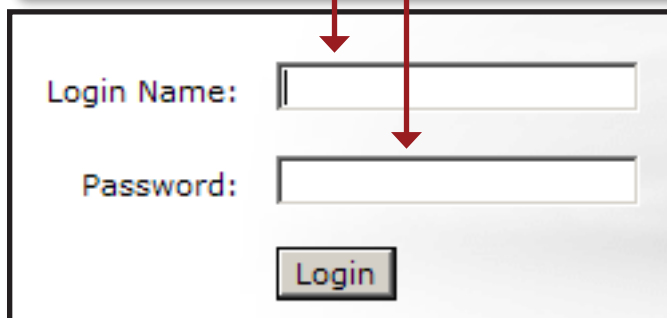
Whether you are a long time user of Nexsure or a new user, Nexsure Help and the Nexsure Training Department offer multiple resources to address your specific training needs. Resources include help topics, training manuals and instructional videos for self-paced learning in addition to classroom instruction led by a Nexsure certified trainer. Here is a roadmap to help you determine the path that best suits your specific needs which include:

- Self Paced Learning
- Before You Start Videos
- Training Manuals
- Tips & Facts – Feature Specific Training
- Instructor Led Training
- Nexsure Is Changing – How To Keep Current With Each New Release
- Getting Ready For A New Release
- Video Overview Archives
- Looking For Something Specific?

Self-Paced Learning

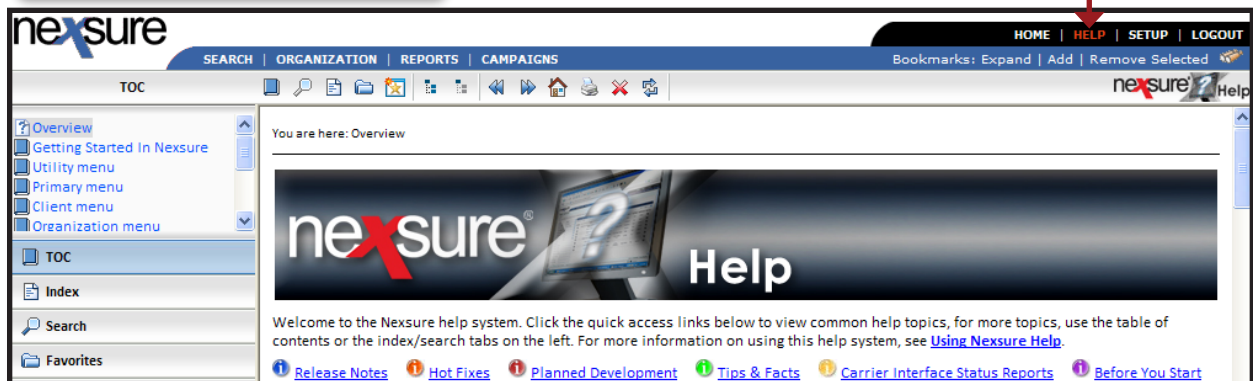
If you are new to Nexsure, looking for a refresher or to cross train, turn to Nexsure Help for self-paced learning. Perform the following steps to access the Training Materials:

1. Enter the **Login Name** and **Password** to log into Nexsure.

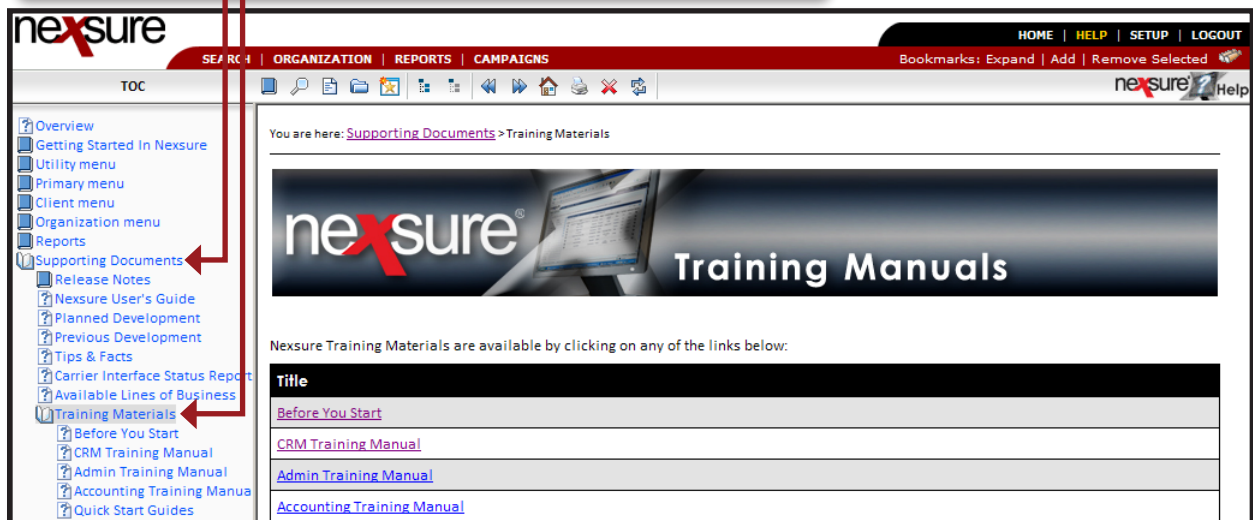


The screenshot shows a login form with two input fields. The first field is labeled "Login Name:" and the second field is labeled "Password:". Below these fields is a "Login" button. Two red arrows originate from the text "Login Name" and "Password" in the step instruction above, pointing directly to their respective input fields in the form.

2. On the **Utility** menu, click **Help**.



3. In the **TOC** (Table of Contents), click **Supporting Documents** > **Training Materials** to view the list of available training materials.

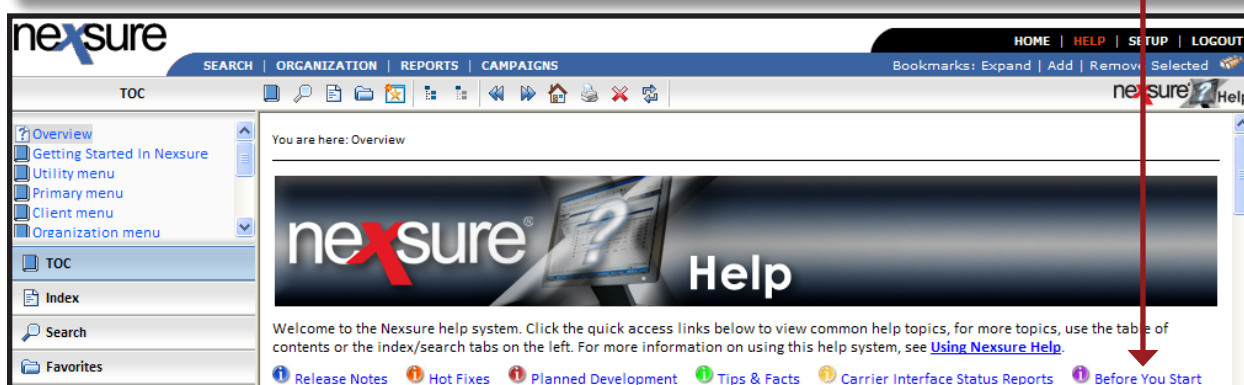




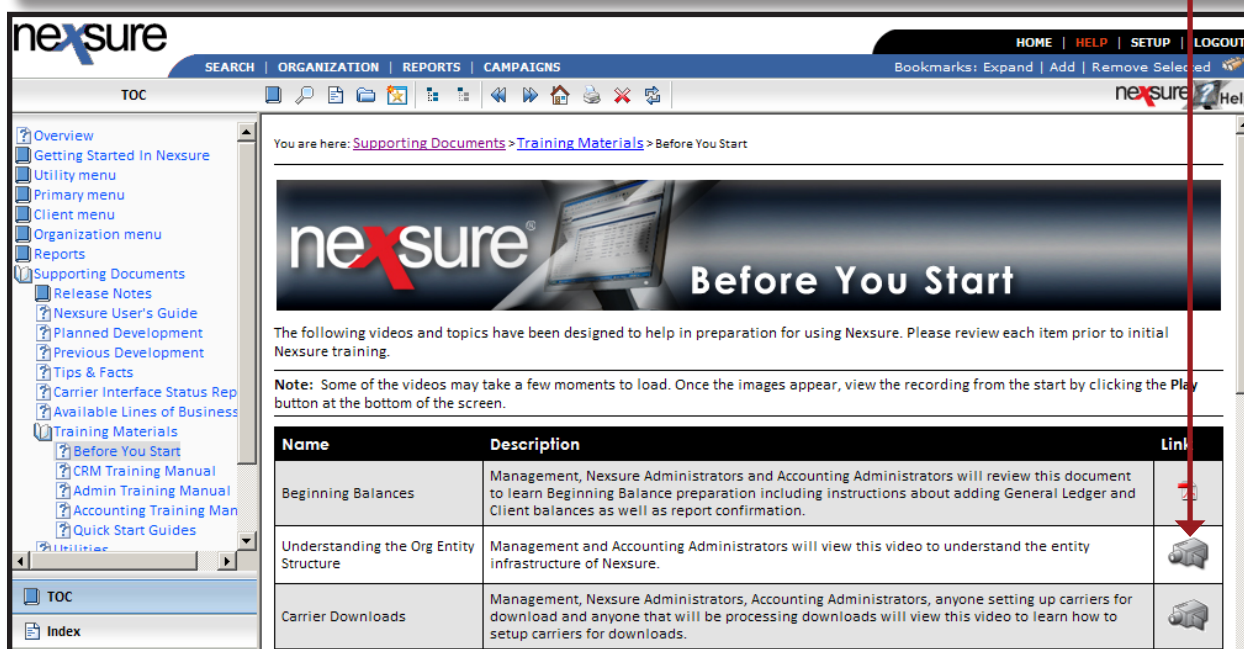
Before You Start Videos

Before You Start videos are designed to help prepare users new to Nexsure for their instructor led new user training sessions. New users also take advantage of the **Before You Start** video library to refresh and reinforce their new user training. Perform the following to access the **Before You Start** videos after accessing Nexsure Help:

1. Click the **Before You Start** link on the **HELP > Overview** page to quickly access the **Before You Start** page.



2. The **Before You Start** video list displays the **Name** of each video and a brief **Description** to highlight the content and type of Nexsure user that will benefit from the video. Click the **Video Camera** icon to view a video (speakers or headphones are required for audio).

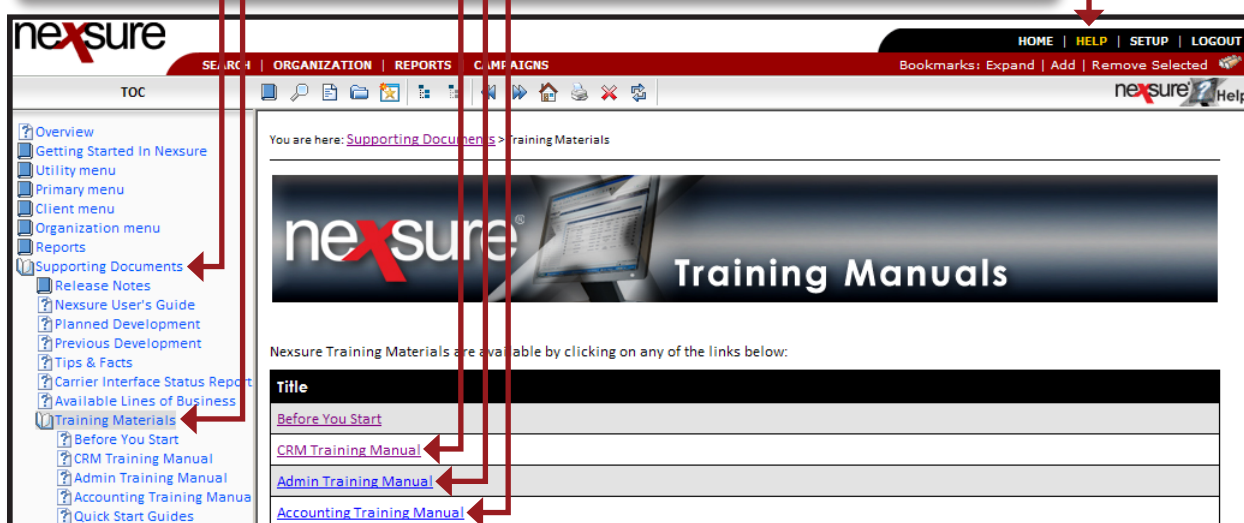




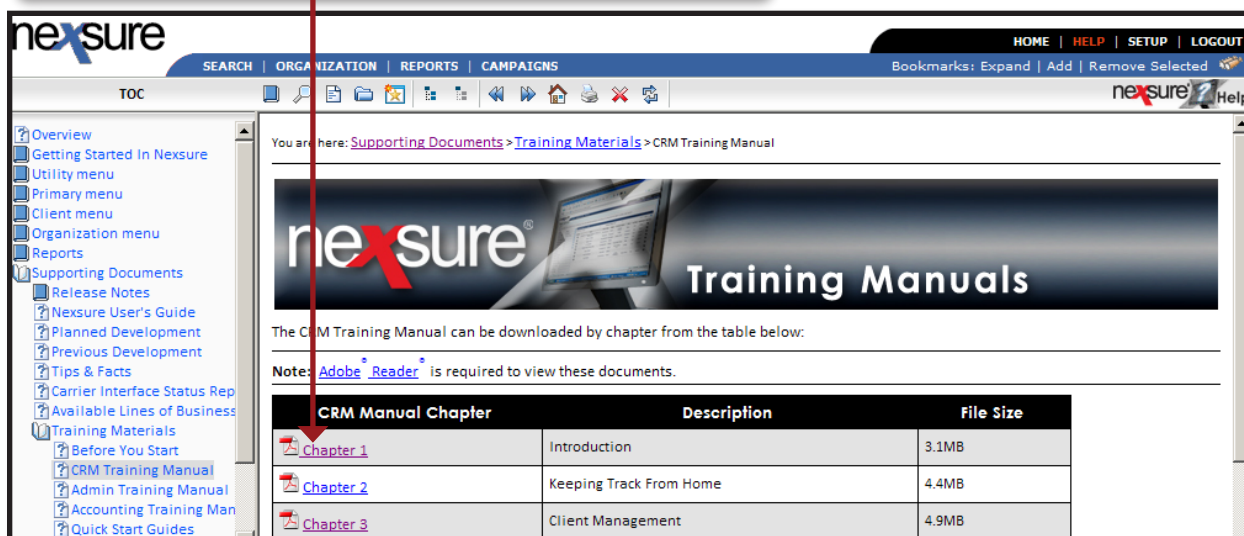
Training Manuals

Training manuals provide in-depth content for each discipline of Nexsure. Perform the following steps to access the Training Manuals page:

1. Click **Help > Supporting Documents > Training Materials > CRM Training Manual, Admin Training Manual or Accounting Training Manual** to access the Training Manuals page.



2. On the Training Manuals page, each training manual is divided into chapters that may be downloaded for viewing.

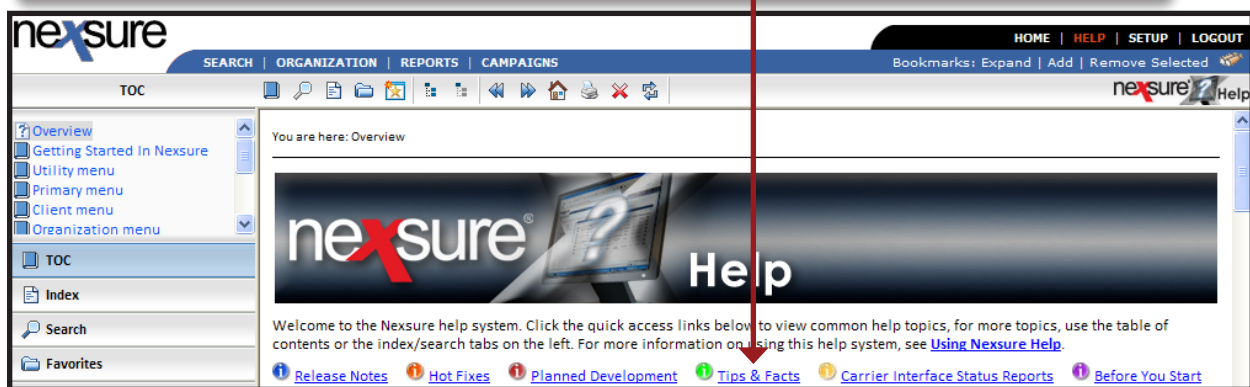




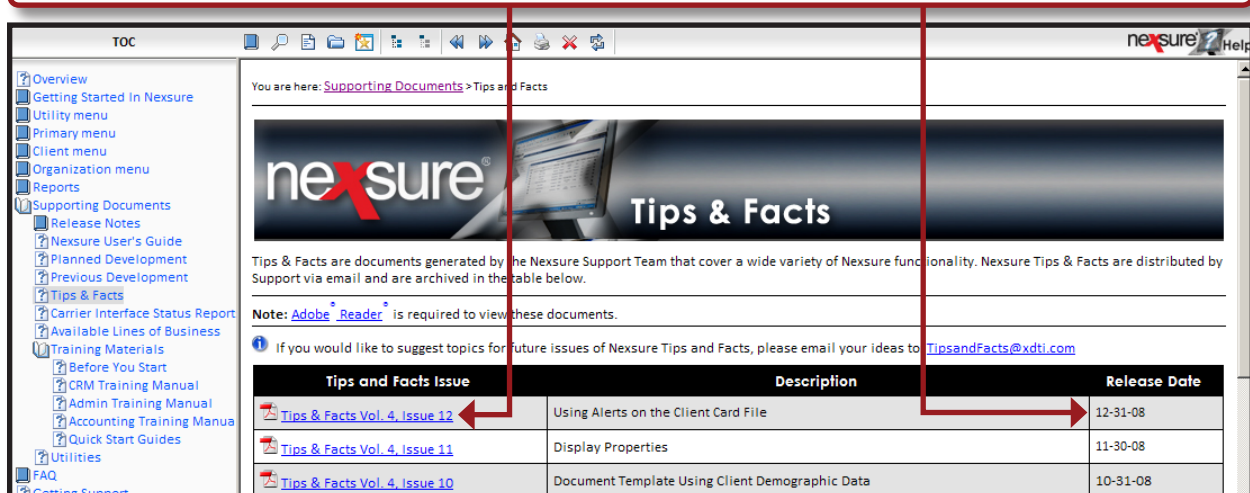
Tips & Facts – Feature Specific Training

Tips & Facts are documents generated by the Nexsure training team and cover a wide variety of Nexsure functionality. Each month, a new Nexsure **Tips & Facts** is distributed by email. All **Tips & Facts** are archived in Nexsure's **HELP > Supporting Documents**. Perform the following to access the **Tips & Facts** documents:

1. Click the  [Tips & Facts](#) link on the **Help > Overview** page to quickly access the **Tips & Facts** page.



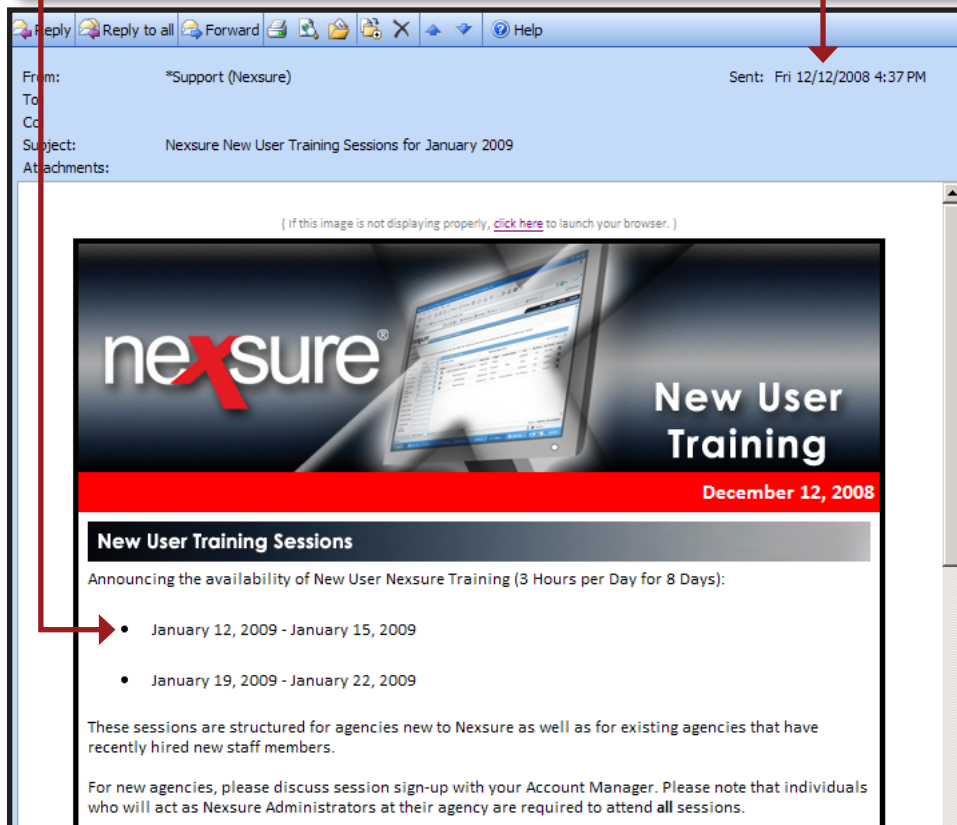
2. Tips & Facts are listed by **Volume** and **Issue** number including a brief description of issue content. A **Release Date** indicates the date the issue was distributed or updated for current Nexsure release functionality.




Instructor Led Training

Nexsure **New User Training Sessions** led by a Nexsure certified trainer are offered for new and existing agencies on a monthly basis.

Invitations are emailed to agency administrators the month prior to the session start date.



Each invitation provides instructions for session sign-up and an overview of the training schedule. Each training session is briefly described on the training schedule and contains a link to download the **Training Session Outline**. Use any **Training Session Outline** to determine what session(s) you want to attend. Each outline provides a timeline and agenda for content to be covered in the session in addition to related self-paced **Training Materials** in Nexsure Help. All training sessions include the latest release content.



Training Session Outline

CRM New User

Nexsure System Overview

○ **Nexsure Operating Environment**

- ☐ Logging into Nexsure
- ☐ Terminology
- ☐ Home menu
- ☐ Navigating in Nexsure
- ☐ Logging Out of Nexsure
- ☐ Help

Approximate Training Time: 3 Hours
References: CRM Training Manual Chapter 1 and
Tips & Facts Volume 1 Issue 5

References: Help > Before You Start > Nexsure Menus
and Nexsure Home Menu Navigation

Hint: Download any **Training Session Outline** to plan your self-paced training!

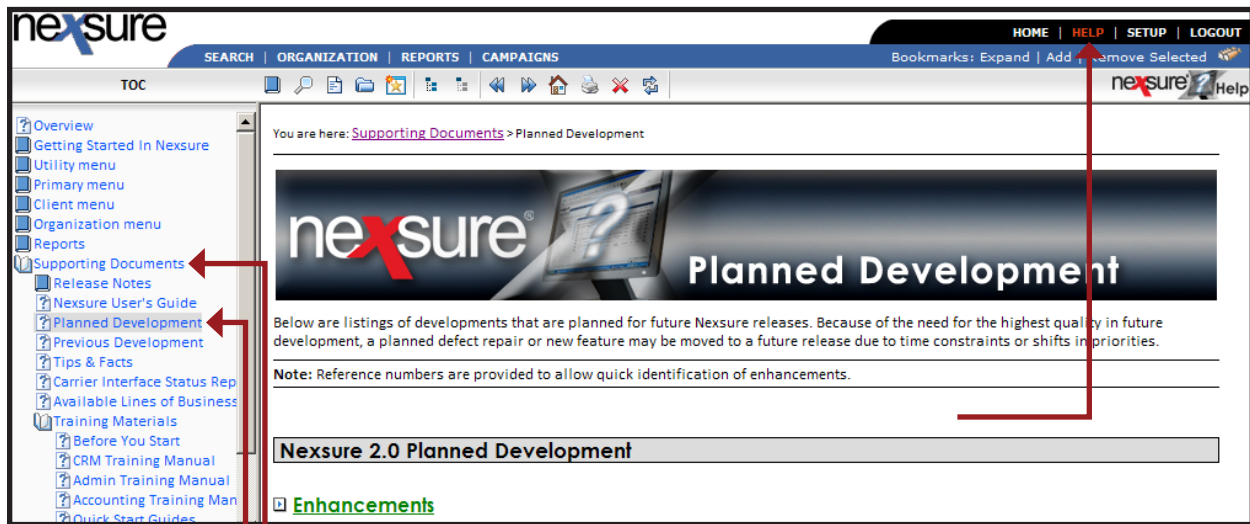
Nexsure Is Changing – How To Keep Current With Each New Release

Release information is made available to all Nexsure users by clicking the **HELP** link. Release information is available in three stages: **Planned Development** (preliminary Release Notes), **Release Notes** (current release) and **Previous Development** (previous Release Notes).

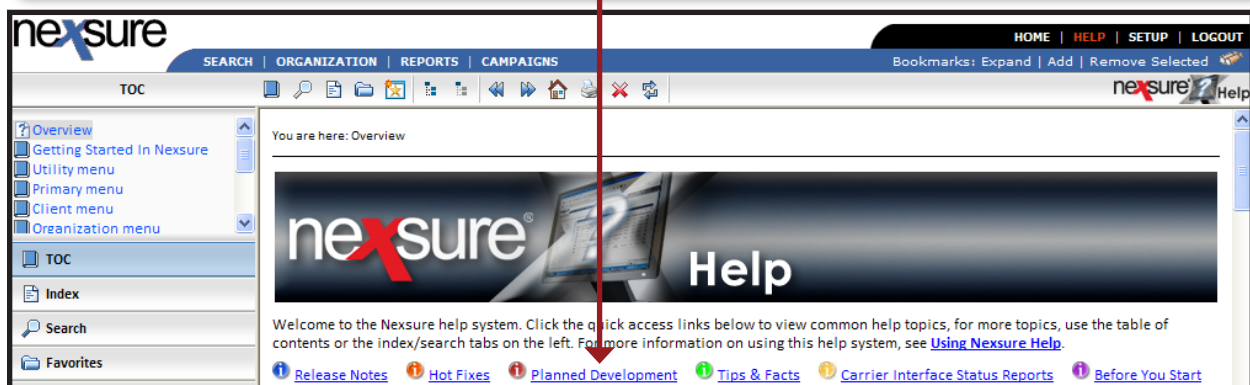


Getting Ready For A New Release

Perform the following steps to access the **Planned Development** page:



1. Click **Help > Supporting Documents > Planned Development** or click the **Planned Development** link on the **Help > Overview** page to quickly access the **Planned Development** page. **Planned Development** is populated with enhancement information and resolved issues that are planned for the next release. When the release is imminent, Nexsure Support emails notification of the new release including instructions for accessing **Planned Development**, **Release Notes** and **Video Overview Sessions**.



2. **Release Notes** and **Video Overview Sessions** are designed to fully prepare you for the new release. New features are listed under **Enhancements** with links to the topic in the Nexsure Help system or to an instructional video. Click the [click here](#) link in the yellow shaded area under **Nexsure 1.95 Enhancements** to view all available video overview sessions, or click the [Link to Video](#) link where it is shown next to a specific topic. Videos may be viewed individually or in group settings (speakers or headphones are required for audio).

The screenshot shows the Nexsure 1.95 Enhancements page. A red arrow points from the text in the tip box to the [click here](#) link in the yellow shaded area. Another red arrow points from the text in the tip box to the [Link to video](#) link in the Business Type Templates section.

Nexsure 1.95 Enhancements

For a video overview of some of the new enhancement features, [click here](#).

Accounting

- Create running totals for items selected for tax authorities. (F4135)
- On the GL account summary screen filter, make the default sort by **Account Number**. (F3594)
- For Disbursements, Receive Payments, Accounts Payable, and Reconciliation, when searching for a client, an (i) will be displayed next to the client's name in the **Select Name** box if the client is inactive. (F3595)
- Invoice screen - Expand work space below header. (F4158) [Link to topic](#)
- Invoice screen - Maximize-minimize icon added. (F4157) [Link to topic](#)
- Invoice screen - Header graphic display improved. (F4156) [Link to topic](#)
- Invoice Perforated - Display invoice details performance improved. (F4155) [Link to topic](#)

Business Type Templates

- Business Type Templates (F3824) [Link to video](#) [Link to topic](#)
- Add business type drop-down to search filter and populate based on user rights template: [Link to video](#)

3. When the video overview [click here](#) link is clicked, individual videos can be viewed by clicking the Video Camera icon.

The screenshot shows the Nexsure 1.95 Enhancements page. A red arrow originates from the [click here](#) link in the yellow box and points to the Video Camera icon in the 'Video' column of the table.

Nexsure 1.95 Enhancements

For a video overview of some of the new enhancement features, [click here](#).

Please take the time to view these sessions and if necessary, schedule a meeting with your staff to view as well. Click on each link below for detailed overviews of 1.95 functionality.

Note: Some of the videos may take a few moments to load. Once the images appear, you may view the recording from the start by clicking the Play button at the bottom of the screen.

- CPA
- CRM
- Accounting
- Business Type Te

Accounting

- Create running
- On the GL acc
- For Disburser next to the cli
- Invoice screen
- Invoice screen
- Invoice screen
- Invoice Perfo

Business Type Te

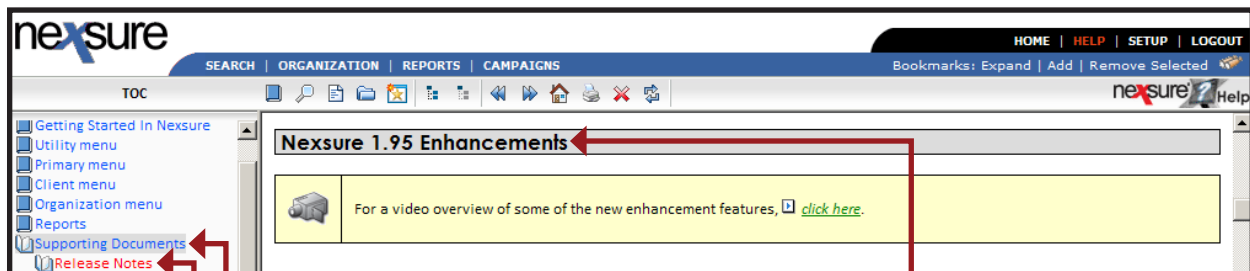
- Business Type
- Add business


Item #	Category	Subtopic	Description of Change	Video
F2840 & F2245, F4265, F4267, F1140, & F4266	Policies	Certificates	<p>Added search by certificate number to cert summary (both views). (F2840 & F2245)</p> <p>Added sort by # of cert holders to certificate summary screen. (F4265)</p> <p>Added number of certificate holders to certificate summary screen. (F4267)</p> <p>The POLICIES > certificates tab search filter has been updated with the following new criteria options: (F1140)</p>	

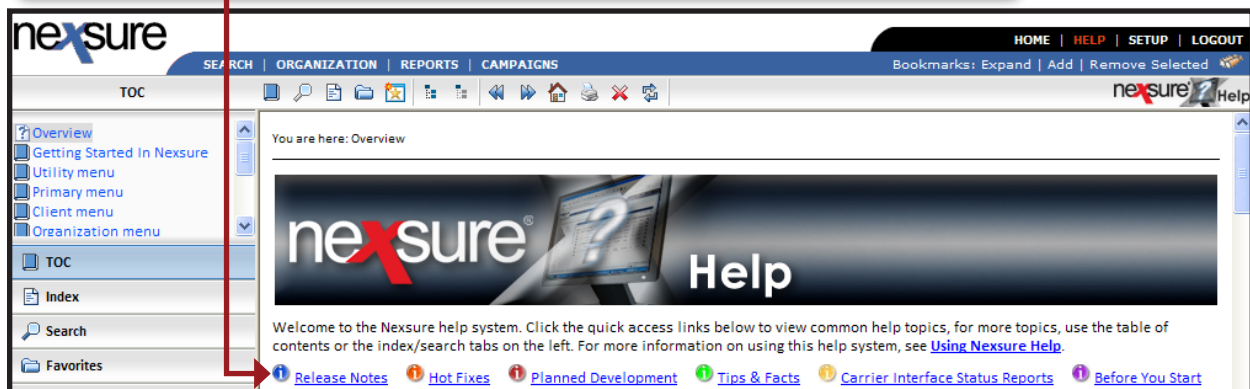


Video Overview Archives

Video overview sessions provided with each new release are available under **Planned Development** until the new release is posted. As soon as the new release is posted, the instructional videos can be accessed by performing the following steps:



1. Click **HELP > Supporting Documents > Release Notes > Nexsure 1.95 Enhancements** to access the new enhancement overview videos on the **Release Notes** page. The **Release Notes** page can also be accessed by clicking the  [Release Notes](#) quick access link on the **HELP > Overview** page to quickly access the **Release Notes** page.



- When a new release is posted, the previous **Release Notes** are archived under **Previous Development**. Click **Help > Supporting Documents > Previous Development** to access the **Previous Development** page.

You are here: [Supporting Documents](#) > Previous Development

Previous Development

To view previous development release notes, click the Nexsure version number below.

Release Date	Version Number
05-09-08	1.94.5
10-12-07	1.93
06-04-07	1.92.5
01-12-07	1.92.0

- Click the desired release under **Version Number** to access the **Release Notes** and enhancement video overview sessions.

- Video Archives can also be accessed by clicking the **Video Library** link on the **Help > Overview** page.

You are here: Overview

Help

Welcome to the Nexsure help system. Click the quick access links below to view common help topics, for more topics, use the table of contents or the index/search tabs on the left. For more information on using this help system, see [Using Nexsure Help](#).

[Release Notes](#) [Hot Fixes](#) [Planned Development](#) [Tips & Facts](#) [Carrier Interface Status Reports](#) [Before You Start](#) [Video Library](#)

5. The **Video Library** organizes all release videos by category. Click a category link to display the list of videos for that category. Videos are listed in numerical order by Defect # and Feature #.

You are here: [Supporting Documents](#) > [Training Materials](#) > Hot Fixes

Video Library

With each release of Nexsure, training videos are created to review the new features added. The videos can be found on the Release Notes for each Nexsure version, but they are also all compiled in this Video Library list for quick reference to any video created. Choose one of the major categories below to jump to that page of videos.

Tip: For videos that are grouped by Nexsure version number, please see the [Previous Development](#) topic.

Video Category
Accounting
Actions
CRM
Delivery
Document Management
Downloads
Entity Standardization
Forms
Portals
Reports
Security
Signatures

6. To view release videos for a specific release, click the Tip's **Previous Development** link on the **Video Library** page to quickly access Release Notes for previous versions of Nexsure.

Looking For Something Specific?

If your training needs do not fit the resources already in place, submit training suggestions or requests by email to Nexsure Support at support.nexsure@xdti.com or to your Account Manager to request a customized training session.