



Expense Approvals on Nexonia's Mobile Application

Expense Approvals on Mobile

The Nexonia Expenses mobile application gives approvers the ability to review expenses submitted to them for approval. You can review submitted expenses and receipts, and choose to approve or reject expenses.

Notes:

1. To process approvals, your mobile app must be connected to the internet. Expense approvals can be done offline, but won't update the report until the app is connected to the internet and synced.
2. The approval function is available on the Apple iOS, Android, and Blackberry versions of Nexonia Expenses.

Nexonia Expenses: Downloading the Mobile App

To download the Nexonia Expenses mobile app, go to the corresponding app store or market for your smartphone or mobile device.

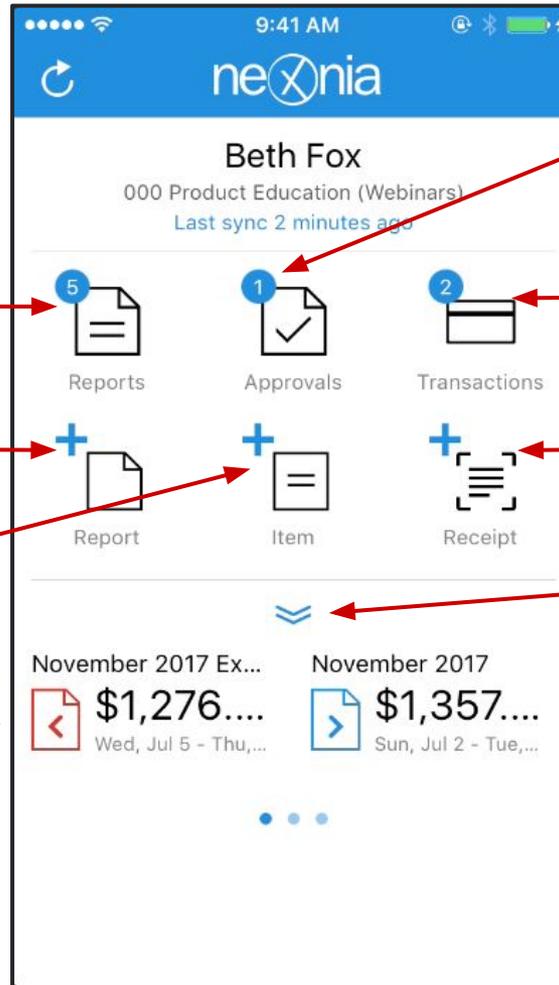
- Apple App Store for iOS devices
- Google Play for Android devices
- Blackberry App World for Blackberry 10 operating system and up

Search for “nexonia expenses” and install the “Nexonia Expenses” application. The app icon should look similar or the same as one of the icons to the right.

Once installed, tap the icon to open the App.



Your Nexonia Expenses App Homescreen



Reports – View your in-progress expense reports.

+ Reports – Create a new expense report.

+ Item – Create a new expense item and add it to a report.

You can tap a report here to open it, or swipe left and right to scroll through your recent expense reports.

Approvals - View any expense items waiting for your approval. The approval icon won't appear until the first time something is submitted to you, at which point it will always be visible.

Transactions - View your available credit card transactions (if applicable).

+ Receipt - Take a picture of a receipt to store for use later. You'll be prompted to select a report where the photo should be added.

Tap the  icon to access the Help and About icons. Help is where you'll find:

- Contact information for Nexonia's Support Team if you're having an issue with the app.
- Nexonia's online Help Center
- Icon Legend
- What's new? – details on new features introduced with this version of the app.

Key Expense App Settings for Approvers

Tap **Settings** to access your personal App settings.

- If the settings switch is pushed to the right and green, the setting is active.
- If the switch pushed to the left and white, the setting is inactive.

Some key settings for approvers:

Automatic Download for Approvals – When expense reports are submitted to you, the app will automatically download the receipts for that report to your mobile device. If this setting is left off, then you'll need to initiate the download of the receipts when reviewing expenses.

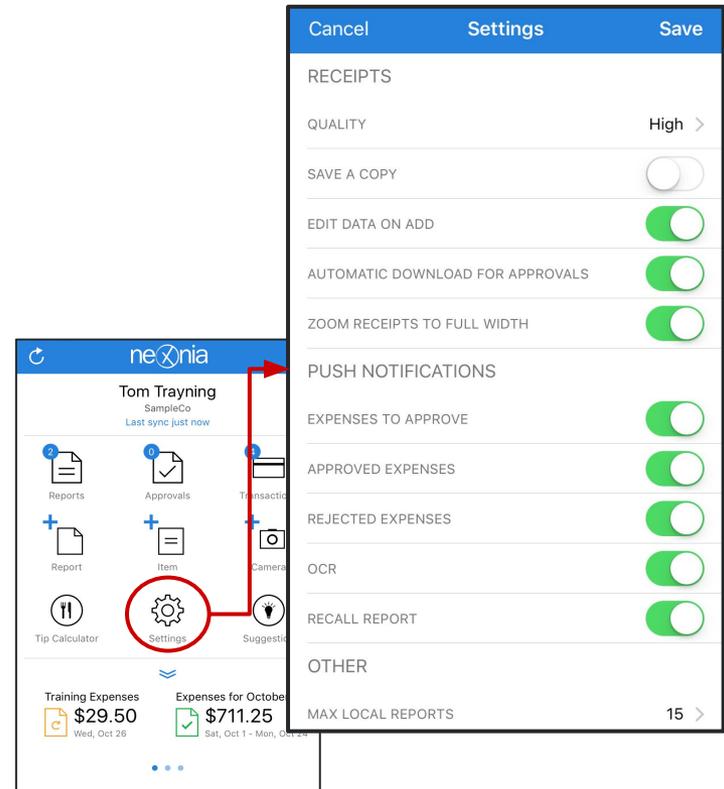
Zoom Receipts to Full Width – When reviewing expenses, the receipt image will automatically zoom to fill the width of the inline receipt view.

Push Notifications – Controls your notifications on the mobile app.

Background Sync – Controls when the app will automatically sync to the web server:

- Enabled – on all the time, including when on mobile data for your device.
- Wi-Fi only – (most common) the app will only sync automatically when connected to a Wi-Fi network.
- Disable – the app will not sync automatically and the user will need to initiate the sync manually.

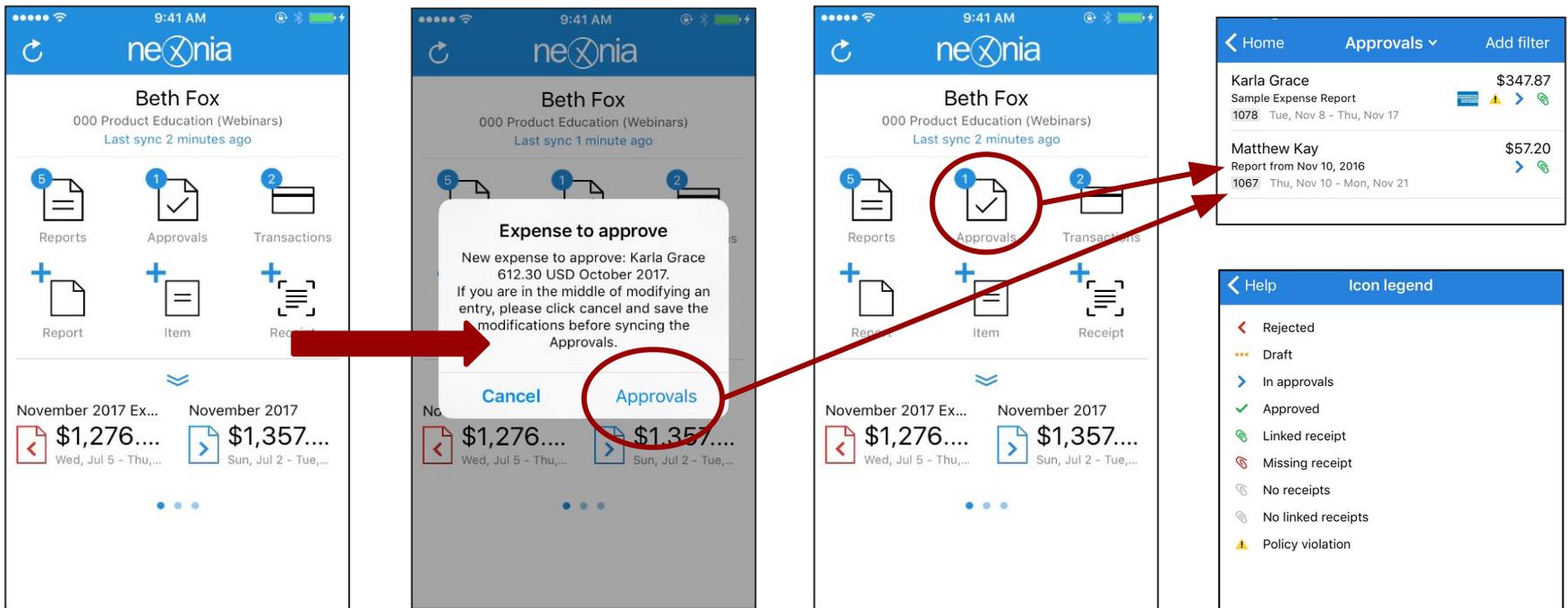
Approvals – An optional setting to remove the approval icon from your homescreen. This would only be done if you were an approver who prefers doing expense approvals on the web and doesn't want to be bother with them on mobile.



Tip: if you want submitted receipts to be downloaded, but only if you're connected to Wi-Fi:

1. **Automatic Download for Approvers** – set to Green
2. **Background Sync** – set to Wi-Fi only

Notification of Submitted Expenses

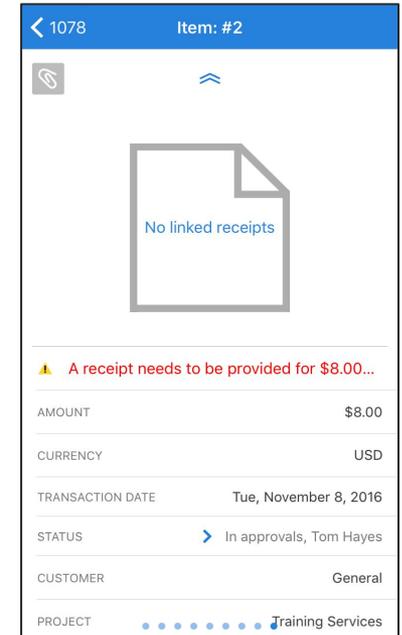
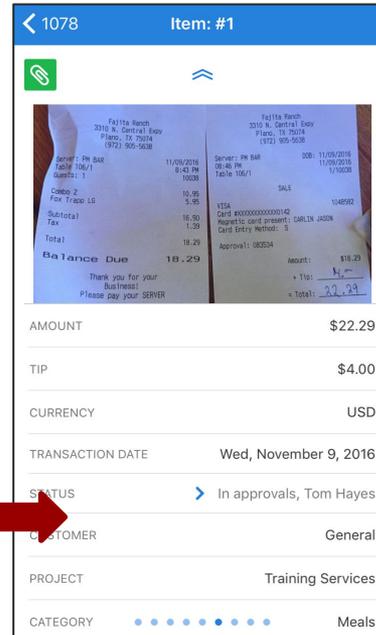
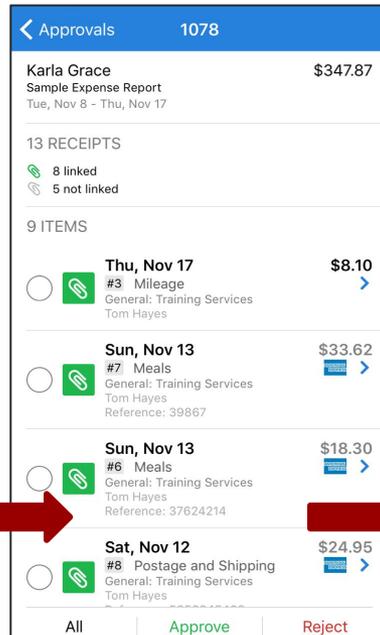
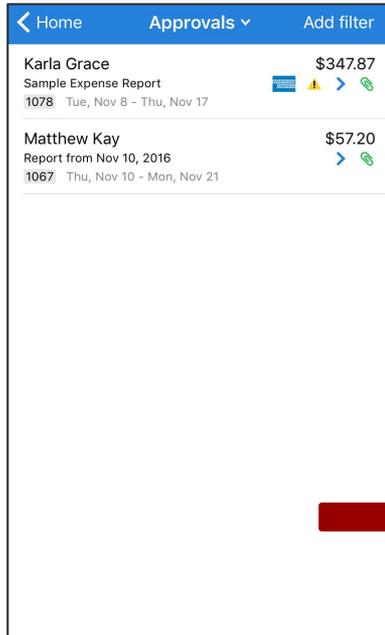


Expenses are submitted by users and move into the approval process. The expense approver gets notified via their email notifications and mobile notifications that expenses have been assigned to them for review.

You can view the expense reports waiting for you by tapping the Approvals button on the mobile notification or tapping the Approvals icon on your home screen. Here we see two reports waiting for us to review.

Each report will show you the **Status** to let you know what stage the items within it are at: **Draft** ●●●, **Submitted** >, **Rejected** < or **Approved** ✓.

Reviewing Expense Reports



Once you tap **Approvals**, you'll see any available reports you can review. You can tap the report line to open the report, tap the expense items to open the items and see the details.

Here we see the inside of the expense report. Any items we can review will have a circle next to it – the circle allows us to select which items to approve or reject.

Tap on an expense item to review the details. As an approver, you'll only be able to select **Submitted** > items to review.

For every expense item, you'll be able to review the linked receipts and the expense details.

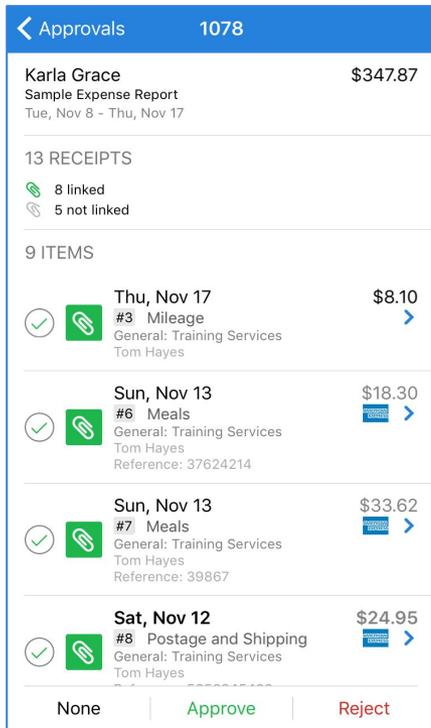
Pinch the in-line receipt image with two fingers to zoom in or out.

Swipe the expense item screen left to move to the next expense and right to the previous expense.

Policy Violations – If a submitted expense is flagged for a Policy Warning, you'll see the policy notification as red text in the expense. Tapping it will bring up a more detailed message indicating why the item was flagged.

Processing Your Approvals

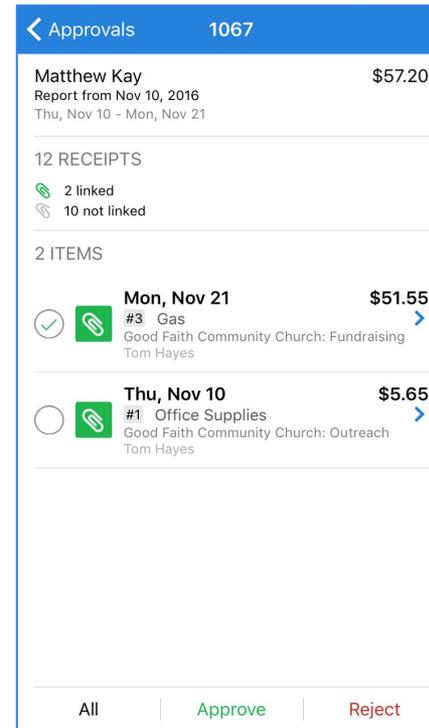
Approving Expenses is done from the Expense Report view. Select the items you want to process, tap **Approve** or **Reject** at the bottom of the screen, and then tap the confirmation message to process your approvals or rejections. Rejecting expense will require you to enter a comment, which will be communicated to the submitter. A rejected expense can be edited by the submitter and resubmitted once corrected.



Approve All / Reject All

To choose to approve or reject all the items at once:

1. Tap **All** to select all items in the report.
2. Tap **Approve** or **Reject**.
3. Tap the confirmation message to process your action.



Selective Approval or Rejection

To choose specific items to approve or reject:

1. Tap the circle of the expense item(s) you want to select to approve or reject.
2. Tap **Approve** or **Reject**.
3. Tap the confirmation message to process your action.

Tip: You could use this method to reject an expense, then use the "Approve All" method to approve the remaining items.

Submitter's View of Approved and Rejected Expenses

Approved ✓

	Wed, Oct 26 #4 Meals-Lunch Internal: Overhead	\$13.75 ✓
	Mon, Oct 24 #2 Airfare Internal: Overhead Travel to the training session	\$675.00 ✓

Approved Expenses - Once expenses have been reviewed and approved, the expense submitter will be alerted via email and mobile notifications. They'll see the status of the expense item updated to **Approved** ✓.

Note: if the approval process involves multiple approvers, expense submitters will get the "approved" status and notifications once the expense is completely approved.

Rejected <

	Wed, Oct 26 #4 Meals-Lunch Internal: Overhead	\$13.75 <
	Mon, Oct 24 #2 Airfare Internal: Overhead Alice Abell	\$675.00 >

Rejected Expense - If an expense item has been rejected by the reviewer, it'll be sent back to the expense submitter with a **Rejected** < status. An email will be sent to the submitter and will include the rejection comment. Here, item #4 has been rejected.

If the item just needs some additional information, the submitter can edit the rejected item, and resubmit it for approval. If it's an outright rejection and won't be reimbursed, they can delete the item from the report.