Introduction

In this training, we'll be going over how to set up and maintain your Approval Workflows in Nexonia as well as some additional administrative functions related to that. 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 Approval Workflows

Within the configuration tab, the section you'll navigate to in order to configure your approval workflows is: Users > Approval (subheading).

When you enter this section, you'll see all of your previously created approval workflows listed in the table below. Typically, some approval workflows will already be created for you during the implementation process of your Nexonia account. As a result, you may never need to enter this section unless you need to make any edits due to personnel changes or otherwise. That being said, you can create any new workflows at any time using the "add" button.

Creating a Simple Approval Workflow

The first approval process we'll look at in this training is the most common and basic one. It's best for smaller companies who have a simple workflow that usually involves one manager approving and maybe an accountant at the end to process reimbursements. To do this, we'll edit an already existing workflow by pressing the "pencil" icon to the left of it in the table.

Upon pressing the "pencil" icon, you'll get brought to the editing interface for your workflow. The second box in this interface lists out each step in the workflow. In order to edit the setup of each step, simply click on its name under the "step" column in that box. This will enable the ability to edit all of the specifics related to this step in the configuration box below.

In this simple workflow, the first approval step involves the user's timesheet or expense report being submitted to their manager for approval. It is assigned as the "relative" level, one position above the user submitter. The "relative" setting takes the "manager" assignment from each user's profile and applies that person as the first level of approval.

After the manager completes their approval, the next step in the workflow involves the accountant. The accountant would complete the final review of the data along with the processing of any reimbursements. If your organization has one accountant, you can set up this person as a "fixed" user in the workflow so that it will always be them in that position.

Along with determining the approvers themselves, there are additional settings you can configure for each step. If you scroll down a bit, one item you can edit is if you'd like the approver to have the ability to reassign the approver once it's their turn. You can also give the approver the ability to edit any expense reports or timesheets that were submitted to them for review. A bit further down, you can turn on the ability for approvers to approve or reject via email as well as if approval or rejection comments are required or not.

Always remember to press the "modify" button in the bottom left to save your changes once the setup is complete.

Creating a Complex Approval Workflow

Some of you may have more complicated workflows that involve additional and conditional reviewers so let's look at that kind of setup now.

In our more complicated workflow, the second box has a lot more steps than the original. However, there are conditions built into some of them so they won't occur every single time. Let's break down these steps to understand them better.

Our first step is similar to the original flow where a user's department manager will be the first level of approval. The second step is conditional, where if an expense item is over $500, it'll get sent to Michael Manager for approval. Following that, the condition of the third step is that if the item is categorized as an airfare expense but is less than $20, it will go to Michael as well. The fourth step will be activated if the airfare expense is over $2000 and that is when it'll go to David Executive for approval. The fifth and final step involves our accountant for final review just like in the simple workflow. Since steps two, three and four are all conditional, they will be bypassed in the workflow if the conditions aren't met.

In order to build out any specific conditions, you'll first want to click on the step itself. Then, scroll down to the "bypass" section in the configuration box below. Here, you can build out your logic using the checkboxes that were provided or with your own coding information. This part can get a bit tricky so we always recommend reaching out to your Customer Success Manager, Implementation Specialist or the Nexonia Support Team for assistance.

Reviewing the Company Hierarchy

Under the "hierarchy" subheading, you're able to review your company's entire reporting structure that has been set up in Nexonia. Everything will be taken from the "manager" assignment in each user's profile and be represented in a tree diagram. If you're ever wondering which users will be pulled in using the "relative" or "absolute" settings in an approval workflow, or if you'd just like to double check your user configuration, this section is a great resource to reference.

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.

One particular article that may be useful to reference when setting up your approval workflows or just to get some more detailed information is: Configuration Guide to Nexonia Approvals.

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!