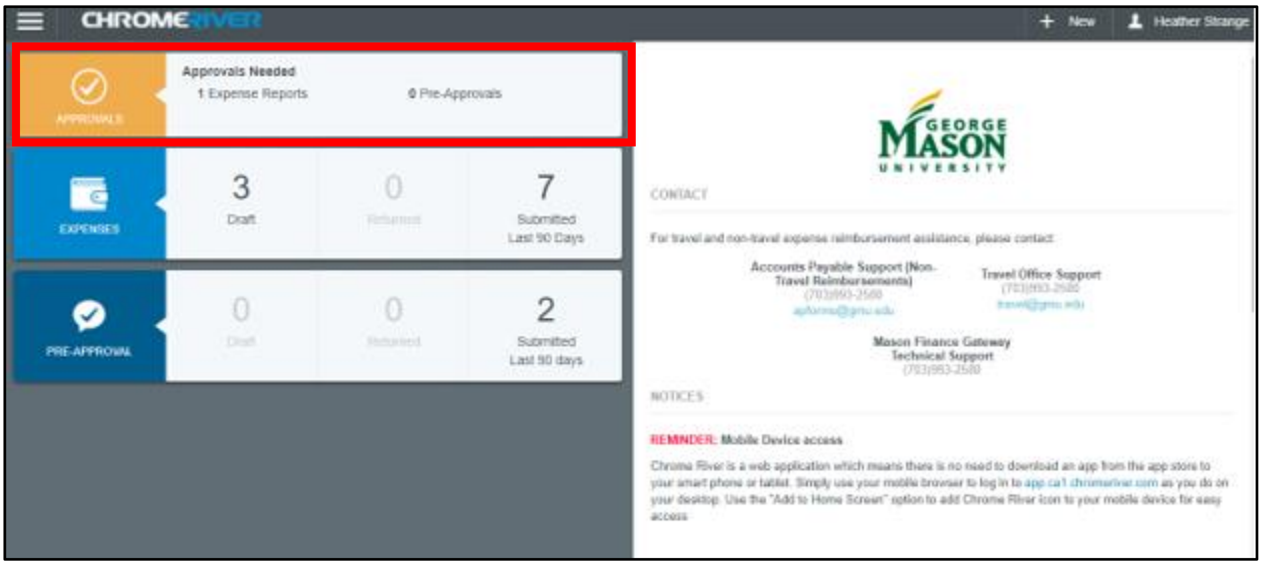
Approver Role in Mason Finance Gateway

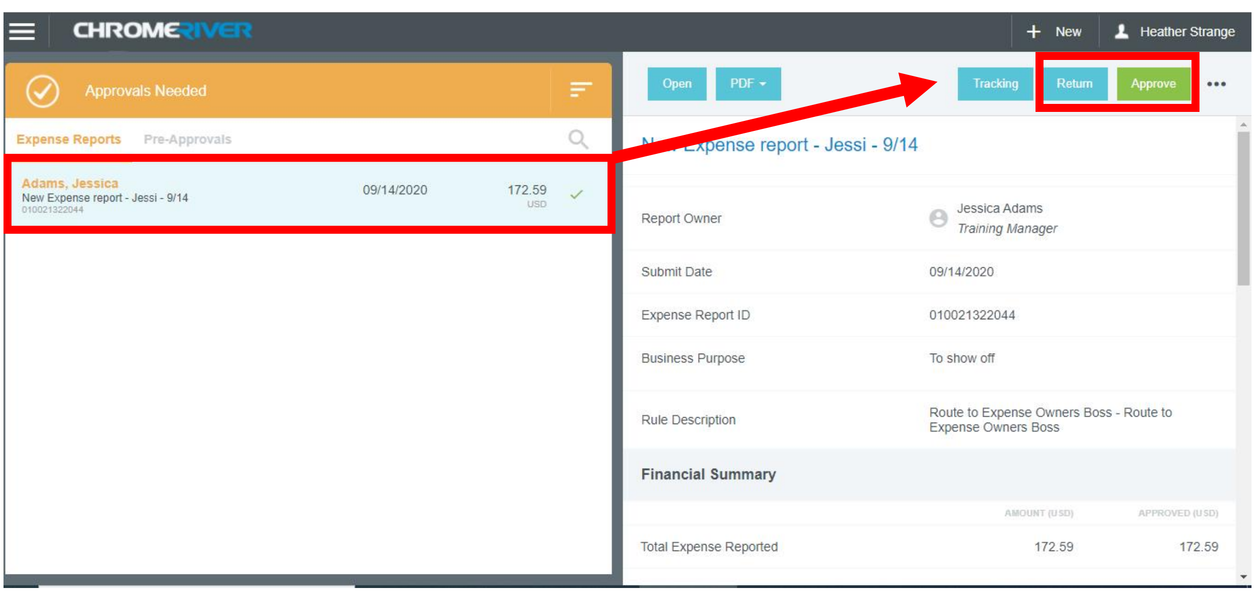
Use this guide to Accept, Return, or Reassign document approval in the Mason Finance Gateway. Users may Accept or Return through email, but must login to the Mason Finance Gateway in order to Reassign approval to another user. A report of all approved documents may be run on an ad hoc basis by following the instructions in this guide.

Approver Action in the Gateway

1. Login to the [Mason Finance Gateway](). (Single Sign on with 2FA is required, [click here]() for more info)
2. On the Summary Dashboard, you will see pending items in the **Approvals Ribbon**. Click on the Expense Reports link to open the approval que. *Note: if you do not have any pending approvals, the Ribbon will not display.*



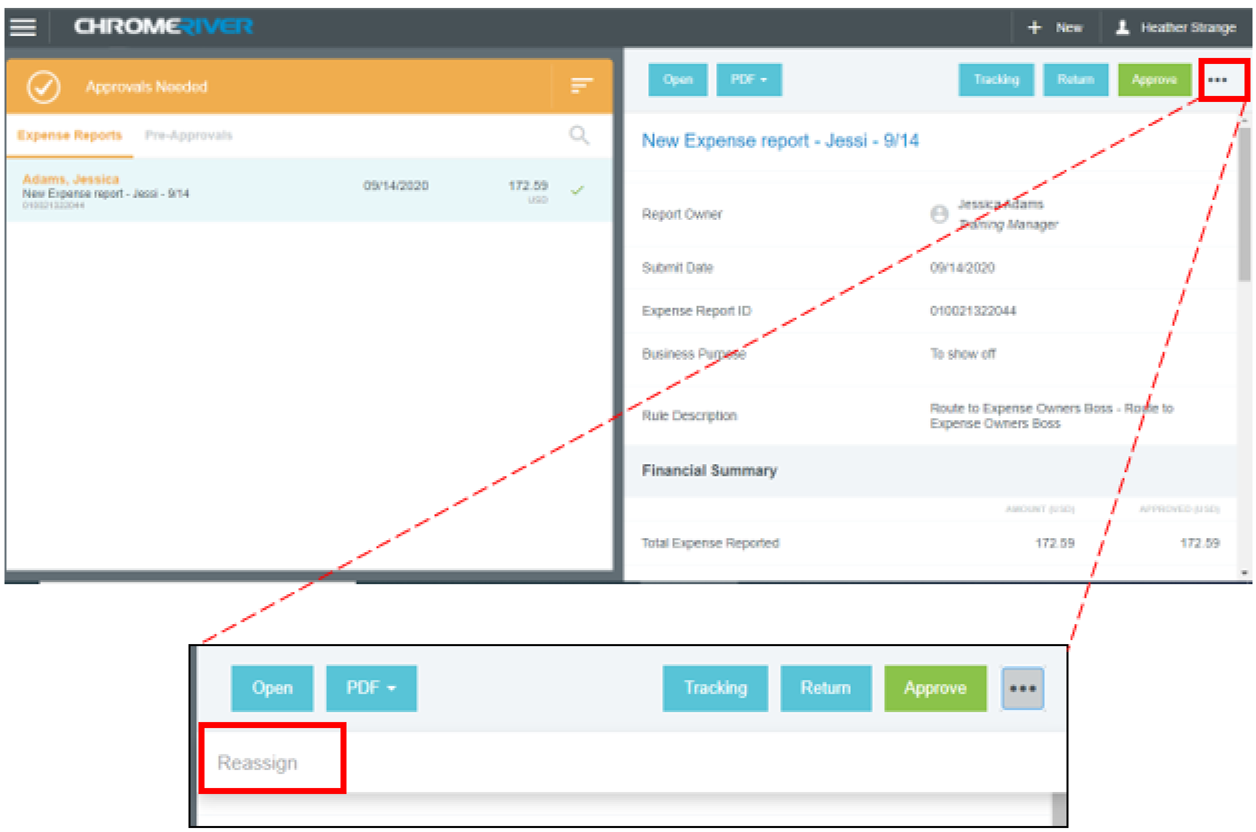
3. In the Que, click on the item you wish to view. To the right you will see the options.



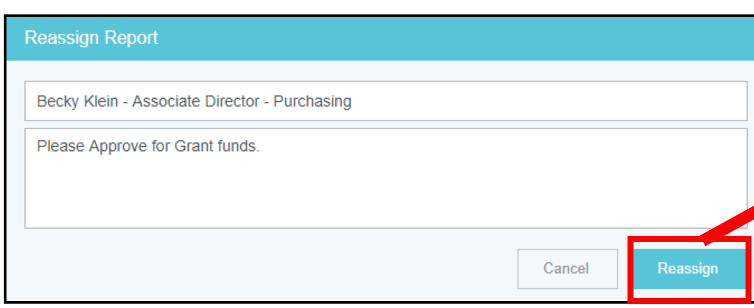
4. Click **Approve** – to accept the document and continue the workflow. Review the Certification and then click *Submit.*

a. Click **Return** – to send the document back to the user for corrections. *Note: Once **Returned**, the user can only edit existing line items but may not add additional line items. If the approver notices a missing expense item, they should instruct the user via email to "recall" the transaction in the Gateway in order to add the additional item and then resubmit to the Approver.*

5. To **Reassign** the document Approval to another user, click on the Ellipses (…)



6. A search box will pop up. Type the name of the person who you wish to "Reassign" the Approval to. It will populate the individuals name and title. Add a note if you desire. Then click the **Reassign** button.



You will see a pop-up that states "*You have reassigned this approval*" and the transaction will be removed from your *Approval* que. The individual who was assigned the approval will receive an email and the document will appear in their *Approval Dashboard*.

7. The transaction(s) will show up with the new Approver listed on the Tracking report when viewed by the User.

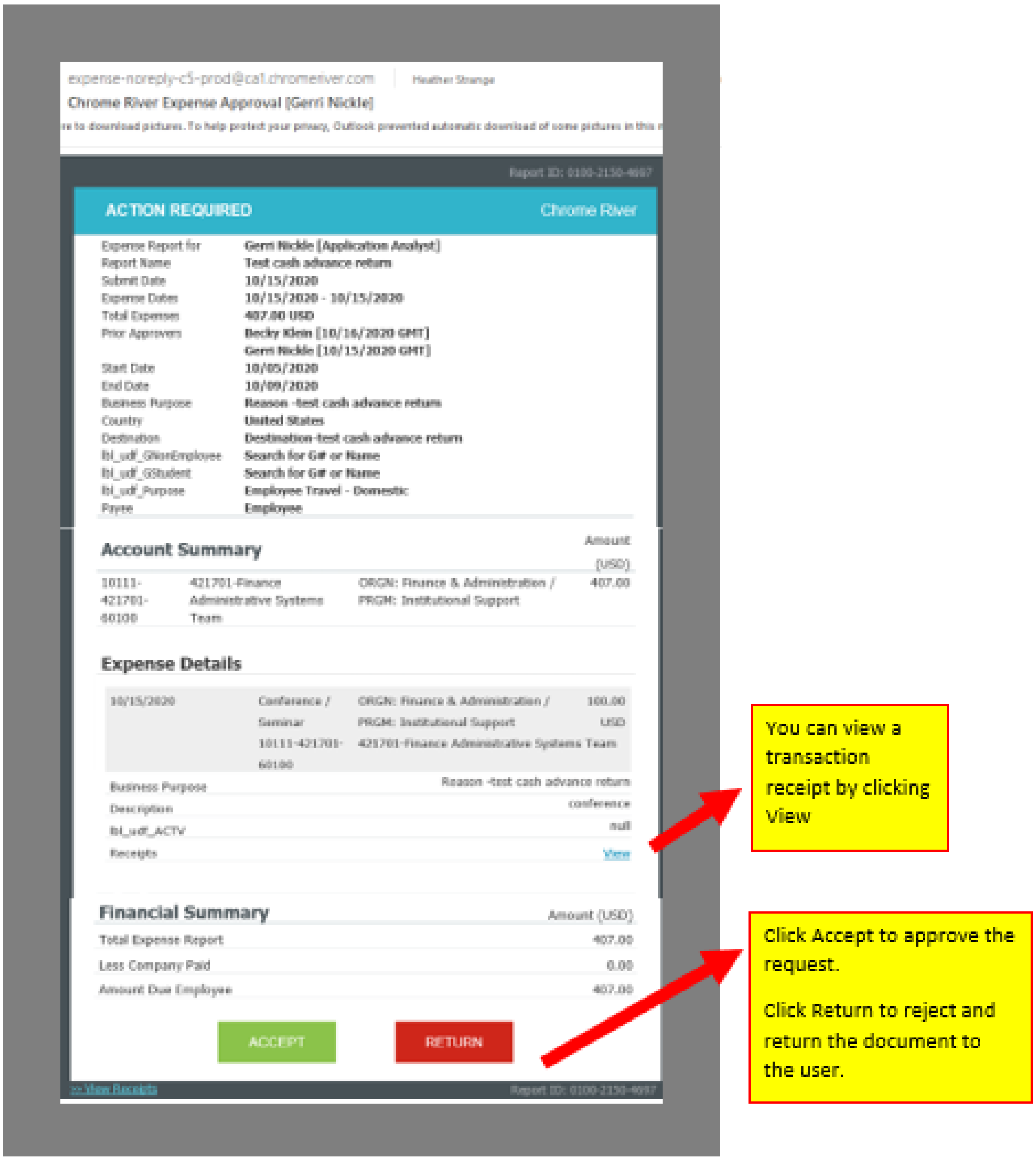
Tracking for New Expense report - Jessi - 9/14

EXPENSE TYPE	AMOUNT (USD)	STATUS	CURRENTLY ASSIGNED
Mileage	115.10	Pending Approval	Becky Klein
Mileage	57.49	Pending Approval	Becky Klein

Approver Role in Mason Finance Gateway

Approver Action via Email

You will receive an email every time a document is ready for your review and approval. You may **Accept** or **Return** directly from the email. You can review transactions and open attachments from the email. After you click an option a new formatted *Reply* email box will open. If you wish to add comments, type them into the top of the email and then click **Send**. Your action will be recorded in the Mason Finance Gateway.



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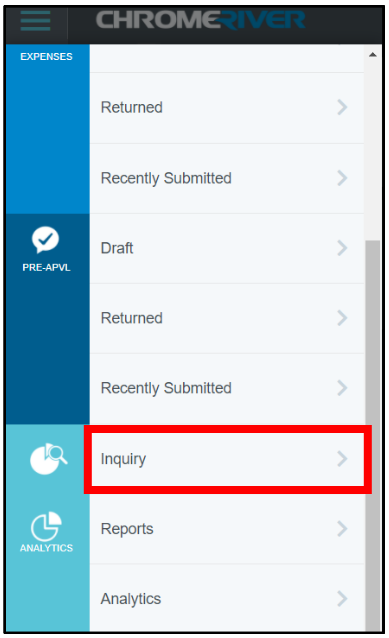
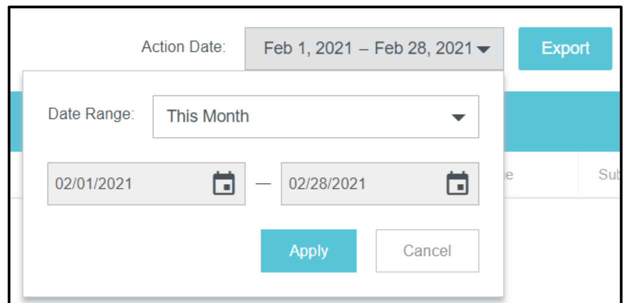
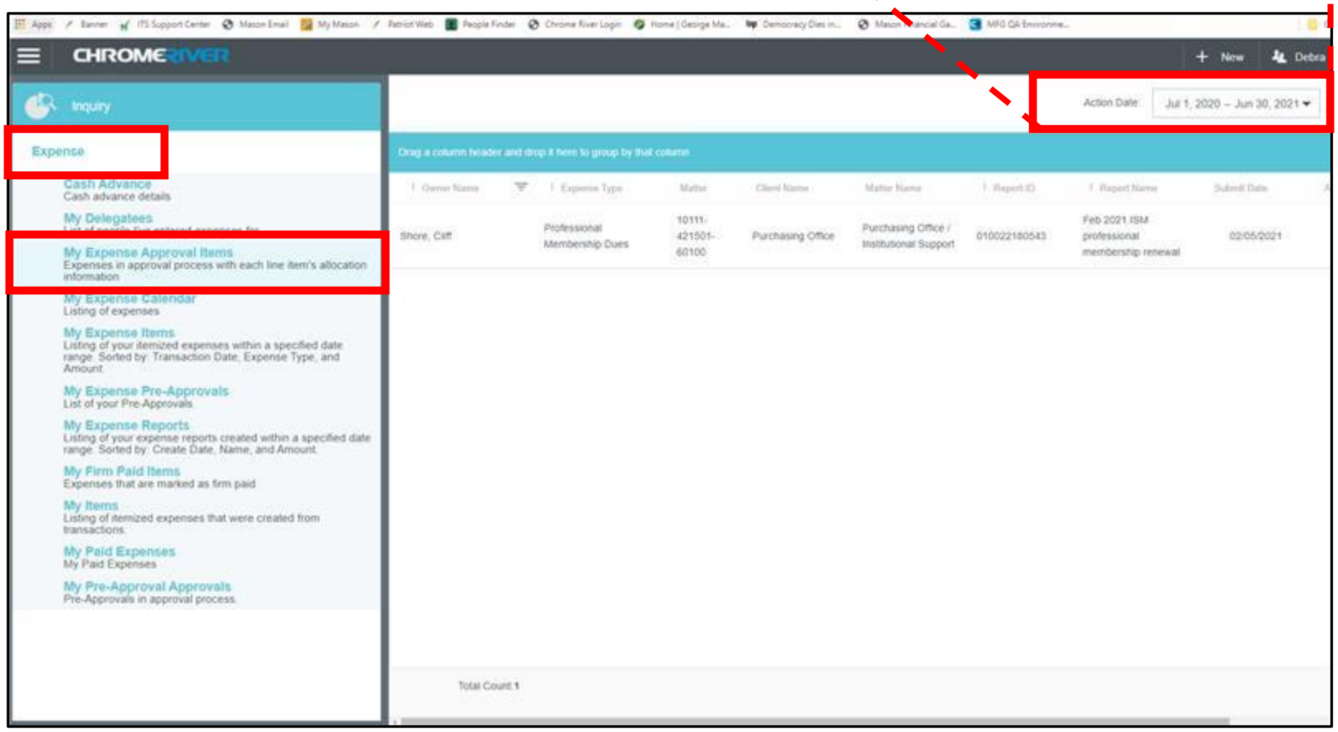
Approval Report

1. Login to the [Mason Finance Gateway](). (Single Sign on with 2FA is required, [click here]() for more info).
2. Open the Navigation menu and select *Inquiry*. Then, choose *Expense – My Expense Approval Items*.
3. Adjust the Date range if desired. List of recorded approvals will display.





Adjust the Report Data by customizing the timeframe.



Additional information and resources are available on the Food and Beverage Overview webpage. For technical assistance with the Gateway please contact mfgadmin@gmu.edu. For questions about reimbursable items please contact acctpay@gmu.edu.