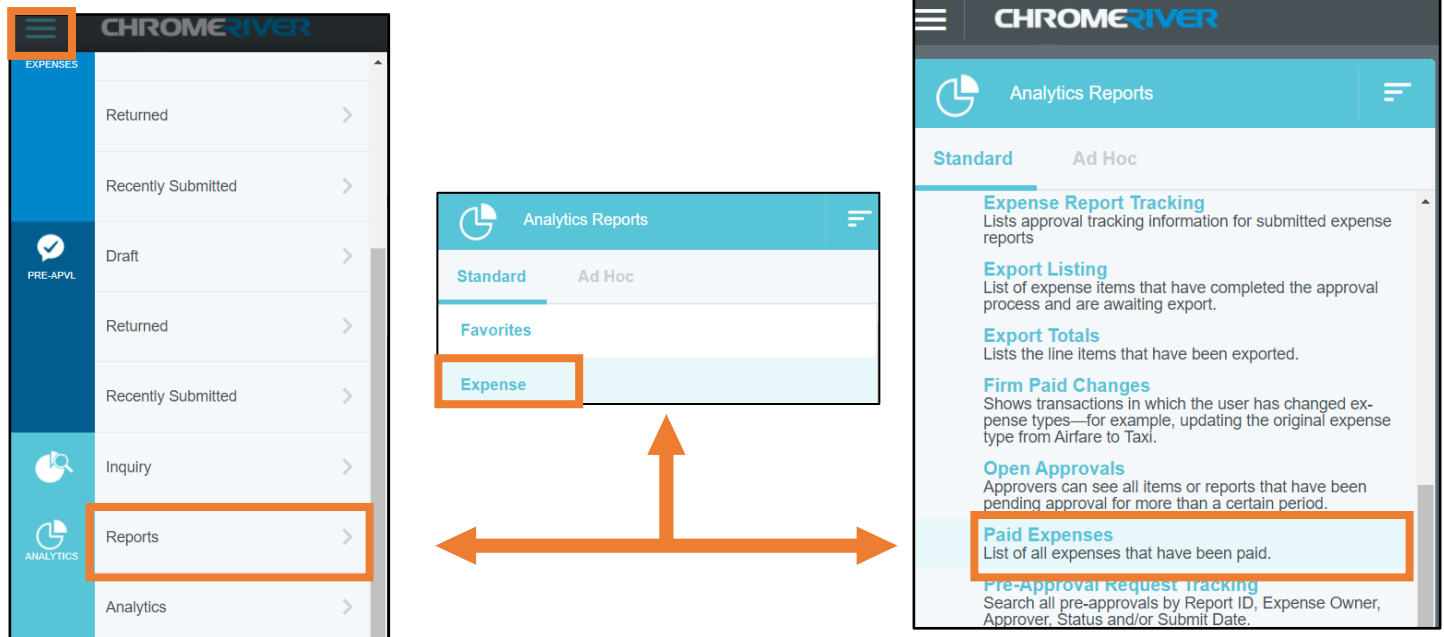


Basic User Reports – Mason Finance Gateway

Reports in the Mason Finance Gateway are not limited by Fund/Org security. Please be aware that you should only access those reports which are necessary for your unit's business operations and reconciliation.

Expense Analysis 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 *Reports*. Then, choose Standard – Expense.
3. Scroll down to *Paid Expenses*.



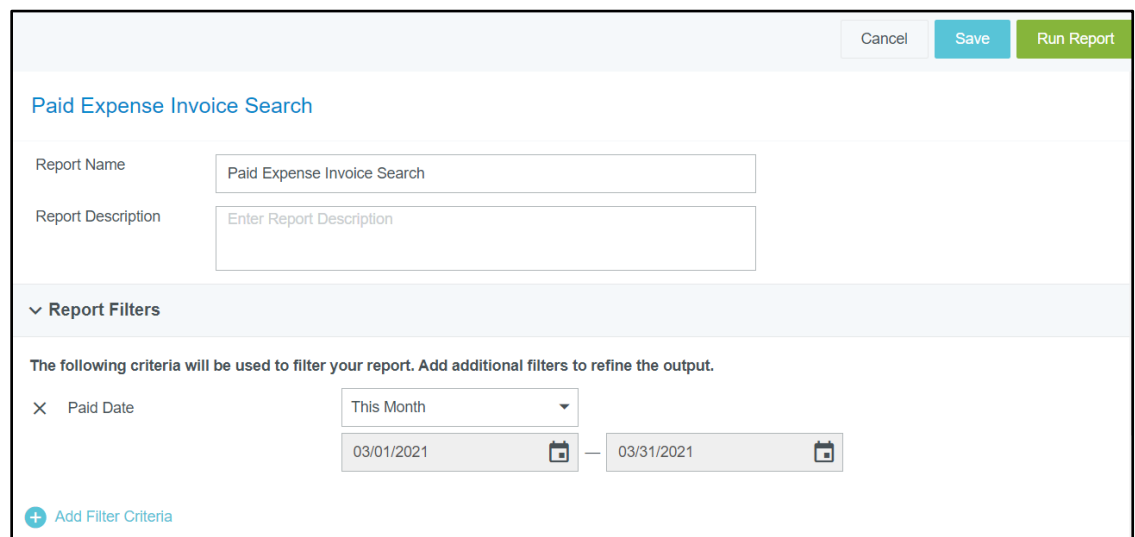
The diagram illustrates the navigation path through the Chrome River interface. On the left, the navigation menu is shown with the 'Reports' option highlighted. An arrow points from 'Reports' to a central box representing the 'Analytics Reports' page, where the 'Expense' option is highlighted. Another arrow points from 'Expense' to the right, leading to the 'Paid Expenses' report page. The 'Paid Expenses' report page lists various report categories, with 'Paid Expenses' highlighted.

4. On the Paid Expense Report, click on “Create New” (if you have no saved template reports, it will take you directly to Step 5 below).



The screenshot shows the 'Paid Expenses' report page. The 'Create New' button is highlighted in the top right corner.

5. This will open the Report Creator. Name the Report – so you can Save it and run it again as needed. Change the dates if desired.



The screenshot shows the Report Creator form for 'Paid Expense Invoice Search'. The form includes fields for Report Name and Report Description. Below these fields is a section for Report Filters, which includes a dropdown for 'Paid Date' set to 'This Month' and date pickers for '03/01/2021' and '03/31/2021'. The form also has 'Cancel', 'Save', and 'Run Report' buttons at the top right.

6. Scroll down to the *Report Columns*. You can add and remove columns as you choose. *These are the suggested Columns to add to produce the appropriate results. Ensure that “Banner Invoice” and “View Report” are added as columns, as shown below.*
7. Select *Group By Banner Invoice*.
8. Select an Output Format. *HTML Active Report will open in a browser tab.*

Report Columns

×

 Expense Owner

×

 Owner Username

×

 Submit Date

×

 Voucher Invoice ID

×

 Paid Amount

×

 Banner Invoice

×

 View Report

+ Add Columns

Group By

Banner Invoice

Output Format

☐ HTML
☐ XLSX
☐ PDF
☒ HTML Active Report

9. In the top left corner click on *Save* – to save the report template and gain the ability to run the same report whenever you choose without additional formatting. Then click *Run Report*.

Cancel

Save

Run Report

10. When the report is generated, you can use **Ctrl + F**, to search the report for the specific Banner Invoice number in question.

Apps

OneDrive

People Finder

Patriot Web

Mason Workshops

Fiscal Services

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x

23 of 23 records, Page 1 of 1

EXPENSE - Paid Expenses

	Expense Owner	Owner Username	Submit Date	Voucher Invoice ID	Paid Amount	Banner Invoice	View Report
	Raz, Ali	araz	02/18/2021	2225528502242319	711.00	I2118078	View
Total: I2118078					711.00		
	Hurley, Jessica	jhurle	02/24/2021	2229081802252314	135.00	I2118179	
Total: I2118179					135.00		
	Buckwalter, Jon Wesley	jbuckwal	02/20/2021	2226433302252314	125.00	I2118180	
Total: I2118180					125.00		
	Soleymani, Patrick	psoleyma	02/17/2021	2224561702252314	304.07	I2118181	
Total: I2118181					304.07		
	McCarron, Graziella	gmccarro	02/16/2021	2223787103012327	36.00	I2118351	View
Total: I2118351					36.00		
	Gearhart, Heidi	hgearhar	02/26/2021	2226121003022308	65.00	I2118429	View
Total: I2118429					65.00		

All Receipts

Cover Page

Full Report

Full Report with Notes

Full Report with Notes and Rece...

Comments

Highlight Value

Highlight Row

Unhighlight All

Filter Cell

[View](#)

Click the View hyperlink to open the specific documents

For technical assistance with the MFG please contact mfgadmin@gmu.edu.