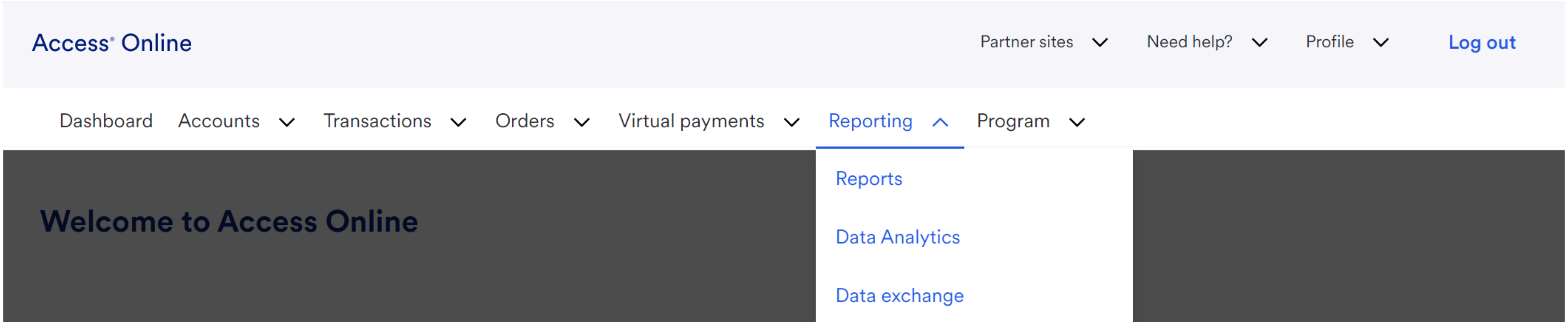
Reporting

Navigate to Reporting



Reporting resources

For more on notification and alert options, attend this class: *Access Online: Standard and scheduled reports*

Reporting

Program Management
General program management activities and monitor company policy compliance.

Financial Management
Monitor expenditures, track variances and manage account allocations.

Supplier Management
These reports manage supplier relationships, support supplier negotiations, and manage spending by category.

Tax and Compliance Management
Estimate sales/use tax, track spending for 1099/1057 vendors, and perform other regulatory reporting.

Administration
These reports allow administrators to support system functionality.

User Activity Audit Reporting
Captures user actions taken within Access Online into a standard report.

Report Scheduler
View and maintain current scheduled reports.

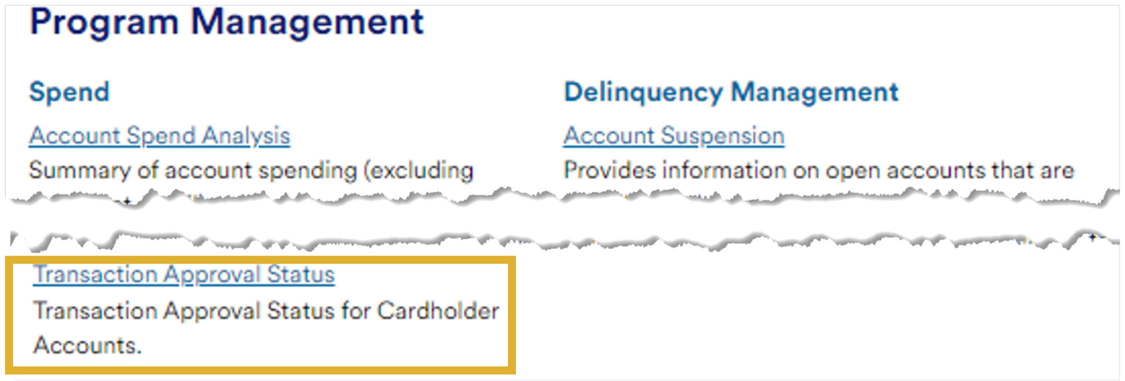
Flex Data Reporting
Create and maintain adhoc reports.

Custom Reports
Create and configure custom reports.

Transaction Management reports

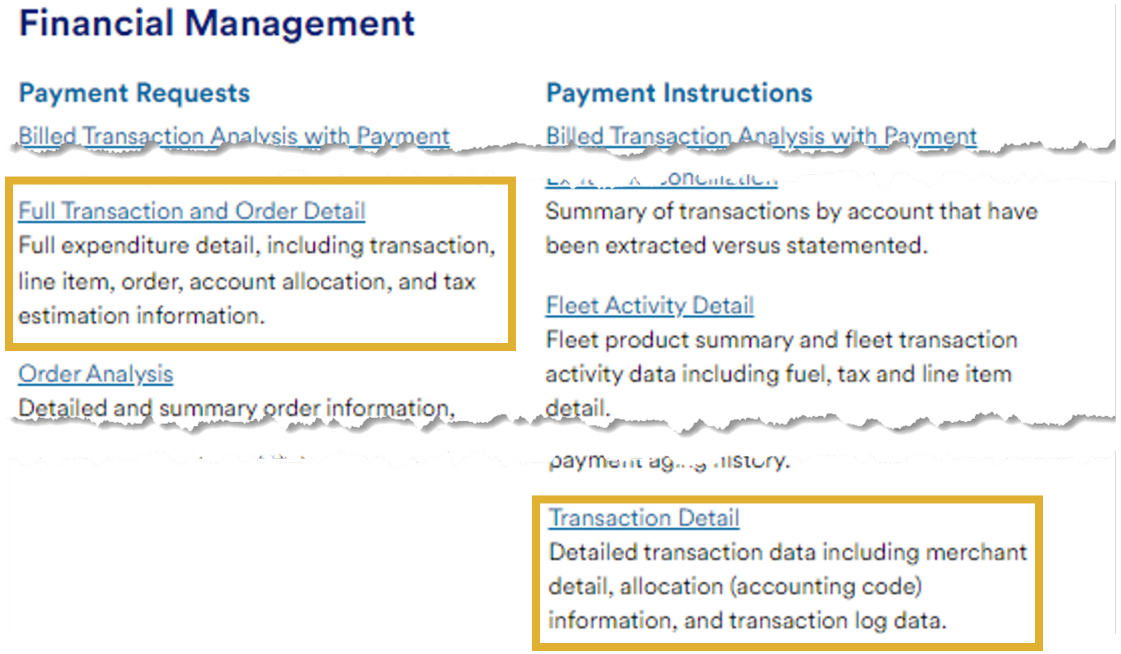
Program Management reports:

Run the *Transaction Approval Status* report for information that helps you manage the approval workflow.

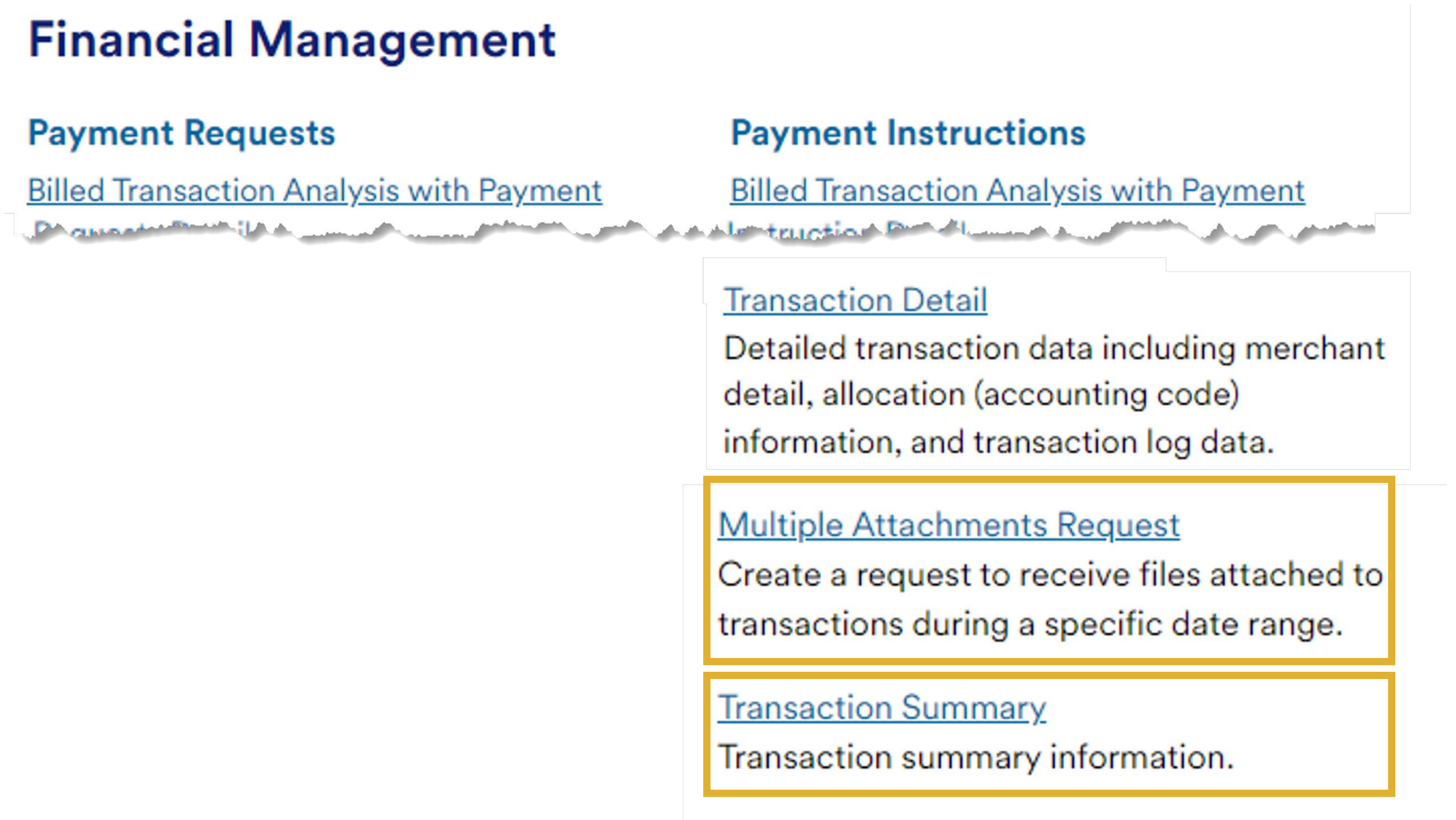


Financial Management reports:

Select the *Full Transaction and Order Detail* report for any available transaction line item (Level III) data. Select the *Transaction Detail* report for full transaction information.



Reports for viewing receipts



We also have resources for viewing transactions receipts.

Select *Multiple Attachments Request* for a single file with all receipt attachments from a specific date range of transactions.

Select Transaction Summary (with PDF output only) for a report containing links to each transaction to view in Access Online (must be logged in to view).

End of session

Now that you have completed this session, you should be able to:

- ✓ Navigate to Transaction Management
- ✓ Review information in transactions:
  - ✓ View transaction information
  - ✓ Approve/Reject/Add/Remove transactions
  - ✓ Run Reports
  - ✓ Setup Back Approver(s)
  - ✓ Set up Notifications
  - ✓ Navigate Online Mobile App