

Reporting

Navigate to Reporting

Access® Online

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Welcome to Access Online

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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.

Report Scheduler

View and maintain current scheduled reports.

Flex Data Reporting

Create and maintain adhoc reports.

Custom Reports

Create and configure custom reports.

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.

Transaction Management reports

Program Management reports:

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

Program Management

Spend

[Account Spend Analysis](#)

Summary of account spending (excluding

Delinquency Management

[Account Suspension](#)

Provides information on open accounts that are

[Transaction Approval Status](#)

Transaction Approval Status for Cardholder Accounts.

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.

Financial Management

Payment Requests

[Billed Transaction Analysis with Payment](#)

[Full Transaction and Order Detail](#)

Full expenditure detail, including transaction, line item, order, account allocation, and tax estimation information.

[Order Analysis](#)

Detailed and summary order information.

Payment Instructions

[Billed Transaction Analysis with Payment](#)

[Transaction Detail](#)

Summary of transactions by account that have been extracted versus statemented.

[Fleet Activity Detail](#)

Fleet product summary and fleet transaction activity data including fuel, tax and line item detail.

[Payment Agency History](#)

[Transaction Detail](#)

Detailed transaction data including merchant detail, allocation (accounting code) information, and transaction log data.

Reports for viewing receipts

Financial Management

Payment Requests

[Billed Transaction Analysis with Payment](#)

Payment Instructions

[Billed Transaction Analysis with Payment](#)

[Transaction Detail](#)

Detailed transaction data including merchant detail, allocation (accounting code) information, and transaction log data.

[Multiple Attachments Request](#)

Create a request to receive files attached to transactions during a specific date range.

[Transaction Summary](#)

Transaction summary information.

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