Run a Report

You can use this quick reference guide as a fast reminder of the basic steps for running a report in Access® Online.

1. Select the Reporting high-level task.
2. Select the category for the report you want to run.
3. Click the report’s name link.
4. Specify report criteria, such as date range, sorting preferences, and output preferences.
5. Click the Run Report button.

Financial Management

Transaction Detail

By default this report will return all results associated with results, enter specific criteria in blank fields.

* = required

Date

☐ Cycle Close Date Range
☐ Calendar Month Range

Start Date: [ ] to End Date: [ ]

Transactions Included

Transaction Status:

☐ Reviewed Status: All

☐ Approval Status:
Hold down the Ctrl key to make multiple selections.

Pending Cardholder
Pending Manager Approval
Final Approval

Disputed Status: All

Transaction Amount:

Break/Subtotal Level

Company

Page Break:

☐ Yes ☐ No

Note: Page Break can be used only if a Break/Subtotal Level is selected.

Run Report Reset Create Scheduled Report
6. Click a link to drill down to additional detail, if available.

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