

Access Online Merged Data Report

Training Document

EDA Homepage

Analytics

JAM Reports

Access Online Merged Data Report

Table of Contents

EDA Roles	1
Where to Run the Report	1
Search Criteria	1
Access Online Merged Data Report Search Criteria:	1
<i>Appointment:</i>	1
<i>Email:</i>	2
<i>Bank FEG:</i>	3
<i>Bank Account:</i>	4
<i>Source System:</i>	5
* <i>Data Output:</i>	7
Search Results	8
Access Online Merged Data Report Results:	8
<i>User Data Columns:</i>	8
<i>Access Online Data Columns:</i>	10
<i>PIEE Data Columns:</i>	12
Exporting Search Results	13
<i>Viewing Available Downloads of Reports:</i>	13
<i>User Data Exported Report Columns:</i>	15
<i>Access Online Exported Report Columns:</i>	17

EDA Roles

Roles with access to the Access Online Merged Data Report in EDA:

- Advanced Reporting
- Executive Reporting
- Acquisition Sensitive Reporting

Where to Run the Report

Expand the **Reports** menu under Analytics in EDA and select the **JAM Reports** option.



In the JAM Reports section select the **Access Online Merged Data Report**.

Report	Description	Documentation
COR Compliance Report	The COR Compliance Report provides information on COR Compliance for all EDA contracts.	VIEW REFERENCE GUIDE
COR Post Award Surveillance Report	The COR Post Award Surveillance Report provides data on submission of Status Reports, Annual Reports, and compliance with WAWF Acceptance.	VIEW REFERENCE GUIDE
JAM Detailed GPC Appointment Status Report	The JAM Detailed GPC Appointment Status Report provides information on all Appointments made, their status and other associated details.	VIEW REFERENCE GUIDE
JAM GPC Training Report	JAM GPC Training Report provides information on training and appointments tied to that training for any user selected training code.	VIEW REFERENCE GUIDE
GPC PIEE Nomination Status Report	The GPC PIEE Nomination Status Report provides information to include nominees, role type and appointment status.	VIEW REFERENCE GUIDE
Access Online Merged Data Report	The Access Online Merged Data Report merges Bank user and account information with JAM appointment and training data.	VIEW REFERENCE GUIDE

Search Criteria

Access Online Merged Data Report Search Criteria:

Appointment:

- * Appointment Type (*multi-select options: Component Prog Manager Appt / Agency/Organization Prog Coordinator Appt / Oversight Agency/Org Prog Coordinator Appt / Certifying Officer Appt / Approving/Billing Official Appt / Cardholder Appt / Contracting Officer Representative Appt*)
- Appointment Status (*options: Draft / Pending Appointee Approval / Rejected by Appointee / Pending Appointing Authority Approval / Rejected by Appointing Authority / Active / Inactive / Deleted / Update; defaulting Active*)

- Appointment Type Sub Filter (*options: All / Micro-Purchase Cardholder / Micro-Purchase Convivence Check Writer / Micro-Purchase ETO CH & Convivence Chk Writer / Micro-Purchase Higher Education Cardholder / Warranted Overseas ETO Cardholder / Contract Order Official Cardholder / Overseas Simplified Acquisition Cardholder / Contract Payment Official Cardholder / Misc Payments Official Cardholder (SF-182 Training Payments) / Inter/Intra-Government Payment Official Cardholder; defaulting All*)
- Appointment Status From Date (*Date field is editable: YYYY/MM/DD format; defaulting to one month prior to today's date*)
- Role Status (*options: Inactive / Active / Archived / Pending Approval / Activation Required / Approver Rejected / Deleted; defaulting Active*)
- to (*Date field is editable: YYYY/MM/DD format; defaulting to today's date*)

NOTE: Fields with default values can have the values removed and searched as "Blank". Example: Appointment Type Sub Filter.

APPOINTMENT

<p>*Appointment Type</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	<p>Appointment Status</p> <div style="border: 1px solid #ccc; padding: 2px;">Active X v</div>
<p>Appointment Type Sub Filter</p> <div style="border: 1px solid #ccc; padding: 2px;">All X v</div>	<p>Appointment Status From Date</p> <div style="border: 1px solid #ccc; padding: 2px;">2025/03/03 📅</div>
<p>Role Status</p> <div style="border: 1px solid #ccc; padding: 2px;">Active X v</div>	<p>to</p> <div style="border: 1px solid #ccc; padding: 2px;">2025/04/03 📅</div>

Email:

- User
- Nominated By
- Appointment Initiated By
- Approved by (DAS/DAA)
- Identified as (Direct) (O)A/OPC on Appointment
- Designation

Email

User **Nominated By**

Appointment Initiated By **Approved By (DAS/DAA)**

Identified as (Direct) (O)A/OPC on Appointment

Designation

Bank FEG:

- Service/Agency (*searchable drop-down*)
- Functional Entitlement Group (*drop-down populates after selecting a 'Service/Agency' option*) (*searchable drop-down*)
- Bank User
 - User ID
 - Email Address

NOTE: 'User ID' AND 'Email Address' fields are mutually exclusive search criteria.

Bank FEG

Service/Agency

Select ▼

Functional Entitlement Group

Select ▼

Bank User

User ID

Email Address

Bank Account:

- Type (*options: Managing Account / Card Account*)
- Account Status (*drop-down populates after selecting a 'Type' option*)
- Last 4
- Account ID
- Name

NOTE: 'Last 4' AND 'Account ID' fields are mutually exclusive search criteria.

Bank Account

Type <input style="width: 90%; border: 1px solid #ccc;" type="text" value="Select"/>	Account Status <input style="width: 90%; border: 1px solid #ccc;" type="text" value="Select"/>
Last 4 <input style="width: 90%; border: 1px solid #ccc;" type="text"/>	Account ID <input style="width: 90%; border: 1px solid #ccc;" type="text"/>
Name <input style="width: 90%; border: 1px solid #ccc;" type="text"/>	

Source System: (drop-down options: *PIEE/JAM/DAU / Access Online*)

(section displays when "PIEE/JAM/DAU" is selected for the 'Source System' field)

PIEE/JAM/DAU:

- Search Type (options: *User / Nominator / Initiator*)
- DoDAAC Type (options: *Authority / Role Location / Home / Procurement*)

NOTE: 'Search Type' AND 'DoDAAC Type' are both required if either one is entered.

Selection Type: (section displays when 'Search Type' has a selection)

- User / Nominator / Initiator: (depending on selection for 'Search Type' field)
 - Organization Type (options: *Organization Code / Organization Group*)
 - (fields display when "Organization Code" is selected for 'Organization Type' field)
 - Organization Code (parameters: *Equal to / Starts With*)
 - (fields display when "Organization Group" is selected for 'Organization Type' field)
 - Organization Group
 - Buttons:
 - Find Group
 - Pop-up Organization Group Selection for "User / Nominator / Initiator" Organization (depending on selection for 'Search Type' field)
 - ^ Organization Find Organization Group by Group Name
 - ^ Organization PIEE Level 2
 - ^ Organization PIEE Level 3
 - Buttons:
 - Save
 - Cancel

- Clear Group
- Include Subgroup (*toggle*)

DoDAAC Type: (*section displays when 'DoDAAC Type' has a selection*)

- “Authority / Role Location / Home / Procurement” DoDAAC (*depending on selection for DoDAAC Type field*) (*parameters: Equal to / Starts with*)
 - (*fields display when “Authority” or “Role” is selected for ‘DoDAAC Type’ field*)
 - Organization Group
 - Buttons:
 - Find Group
 - Pop-up Organization Group Selection for “Authority / Role Location / Home / Procurement” Organization (*depending on selection for ‘DoDAAC Type’ field*)
 - ^ Organization Find Organization Group by Group Name
 - ^ Organization PIII Level 2
 - ^ Organization PIII Level 3
 - *Buttons:*
 - Save
 - Cancel
- Clear Group

Source System

PIEE/JAM/DAU x v

PIEE/JAM/DAU

Search Type: Nominator x v DoDAAC Type: Role Location x v

Selection Type

Nominator

Organization Type: Organization Code x v

Organization Code: Equal to x v

DoDAAC Type

Role Location DoDAAC: Equal to x v

Organization Group

(section displays when "Access Online" is selected for the 'Source System' field)

Access Online:

- Search Type (options: Reporting Hierarchy / Processing Hierarchy)
- (fields display when "Reporting Hierarchy" is selected for 'Search Type' field)
 - Level 1
 - Level 2
 - Level 3
 - Level 4
 - Level 5
 - Level 6
 - Level 7
- (fields display when "Processing Hierarchy" is selected for 'Search Type' field)
 - Agent
 - Company

The screenshot shows a web form with the following structure:

- Source System**: A dropdown menu with "Access Online" selected.
- Access Online**: A section header.
- Search Type**: A dropdown menu with "Reporting Hierarchy" selected.
- Level 1** through **Level 7**: Seven empty input fields arranged horizontally.

* Data Output: (radio buttons)

- By PIEE Data
- By Access Online Data
- By User Data

*** Data Output**

By PIEE Data

By Access Online Data

By User Data

Click the **Search** button after entering the search criteria. The search results display on the following page.

The Access Online Merged Data Report Results table displays the search results. Search Result output depends on the '**Data Type**' selected on the search criteria screen.

Access Online Merged Data Report Results:

User Data Columns:

- Appointee Organization Level (Home)
- Appointee Organization Code (Home)
- Service Org
- Appointee Group Path
- Appointee First Name
- Appointee Last Name
- Appointee Email Address
- Appointee Designation
- Appointment ID
- Appointment Type
- Appointment Status
- Appointment Status Date
- Appointee Role Type
- Appointee Role Status
- Appointee Role Status Date
- Supervisor Email Address
- Nominator Group Path
- Nominator Email Address
- Direct User Type
- Direct User Email Address
- Direct User Group Name
- Direct User DoDAAC
- Authority Email Address
- Authority Role

Search Results

- Service / Agency
- Service/Agency Shortname
- User ID
- User ID Status
- User ID Created By
- Last Login Date
- Name
- Bank Email Address
- Bank Phone Number
- Entitlement Group
- Level 1
- Level 2
- Level 3
- Level 4
- Level 5
- Level 6
- Level 7
- Agent
- Company Number
- Role DoDAAC/ID
- Cardholder Account Type
- Account Status
- Cardholder/Checking Account Last 4
- Cardholder/Checking Account Single Purchase Limit
- Cardholder/Checking Account Credit Limit
- Cardholder/Checking Account Daily Limit
- Cardholder/Checking Account Cycle Limit
- Managing Account Last 4
- Managing Account ID
- Managing Account Credit Limit
- Managing Account Cycle Limit
- Managing Account Quarterly Limit
- Managing Account Annual Limit
- Last Training Completed Name
- Last Training Completed Date
- Next Training Due Name
- Next Training Due Date
- Next Training Due Frequency
- Training Past Due Name
- Training Past Due Last Completed Date
- Training Past Due Date
- Training Past Due Frequency
- Last Course Completed Name
- Last Course Completed Date
- Nominator Organization Code
- Initiator Organization Code

- Authority DoDAAC
- Home DoDAAC
- Role Location DoDAAC
- Procurement DoDAAC

Access Online Access Merged Data Search Results

By User Data

[Export Results](#)
[Save Search](#)
[Refine Search](#)
[New Search](#)

Appointee Organization Level (Home) ↑↓	Appointee Organization Code (Home) ↑↓	Service Org ↑↓	Appointee Group Path ↑↓	Appointee First Name ↑↓	Appointee Last Name ↑↓	Appointee Email Address ↑↓
	S0512A			Rhub	Talent	RhubTalent@dla.mil
	S0512A			Rhub	Talent	RhubTalent@dla.mil
	S0512A			Rhub	Talent	RhubTalent@dla.mil
	S0512A			Rhub	Talent	RhubTalent@dla.mil
	S0512A			Rhub	Talent	RhubTalent@dla.mil
	S0512A			Rhub	Talent	RhubTalent@dla.mil
	S0512A			Rhub	Talent	RhubTalent@dla.mil
	S0512A			Rhub	Talent	RhubTalent@dla.mil
	S0512A			Rhub	Talent	RhubTalent@dla.mil
	S0512A			Rhub	Talent	RhubTalent@dla.mil
	S0512A			Rhub	Talent	RhubTalent@dla.mil

Records: 1 to 10 28 Records Returned

<< < 1 2 3 > >>
 10 ▾

Access Online Data Columns:

- Service / Agency
- Service/Agency Shortname
- User ID
- User ID Status
- User ID Created By
- Last Login Date
- Name
- Bank Email Address
- Bank Phone Number
- Entitlement Group
- Level 1

- Level 2
- Level 3
- Level 4
- Level 5
- Level 6
- Level 7
- Agent
- Company Number
- Role DoDAAC/ID
- Cardholder Account Type
- Account Status
- Cardholder/Checking Account Last 4
- Cardholder/Checking Account Single Purchase Limit
- Cardholder/Checking Account Credit Limit
- Cardholder/Checking Account Daily Limit
- Cardholder/Checking Account Cycle Limit
- Managing Account Last 4
- Managing Account ID
- Managing Account Credit Limit
- Managing Account Cycle Limit
- Managing Account Quarterly Limit
- Managing Account Annual Limit
- Appointee Organization Level (Home)
- Appointee Organization Code (Home)
- Appointee First Name
- Appointee Last Name
- Appointee Email Address
- Appointee Designation
- Supervisor Email
- Number of Active CPM Appointments
- Number of Active OA/OPC Appointments
- Number of Active AOPC Appointments
- Number of Active ABO Appointments
- Number of Active CO Appointments
- Number of Active CH Appointments
- Last Training Completed Name
- Last Training Completed Date
- Next Training Due Name
- Next Training Due Date
- Next Training Due Frequency
- Training Past Due Name
- Training Past Due Last Completed Date
- Training Past Due Date
- Training Past Due Frequency
- Nominator Organization Code
- Initiator Organization Code

- Authority DoDAAC
- Home DoDAAC
- Role Location DoDAAC
- Procurement DoDAAC

PIEE Data Columns:

- Appointee Organization Level (Home)
- Appointee Organization Code (Home)
- Service Org
- Appointee Group Path
- Appointee First Name
- Appointee Last Name
- Appointee Email Address
- Appointee Designation
- Appointment ID
- Appointment Type
- Appointment Status
- Appointment Status Date
- Appointee Role Type
- Appointee Role Status
- Appointee Role Status Date
- Supervisor Email Address
- Nominator Group Path
- Nominator Email Address
- Direct User Type
- Direct User Email Address
- Direct User Group Name
- Direct User DoDAAC
- Authority Email Address
- Authority Role
- Last Training Completed Name
- Last Training Completed Date
- Next Training Due Name
- Next Training Due Date
- Next Training Due Frequency
- Training Past Due Name
- Training Past Due Completed Date
- Training Past Due Date
- Training Past Due Frequency
- Service / Agency
- Service / Agency Shortname
- User ID
- User ID Status
- User ID Created By

- Last Login Date
- Name
- Bank Email Address
- Bank Phone Number
- Entitlement Group
- Number of Card Accounts
- Number of Managing Accounts
- Nominator Organization Code
- Initiator Organization Code
- Authority DoDAAC
- Home DoDAAC
- Role Location DoDAAC
- Procurement DoDAAC

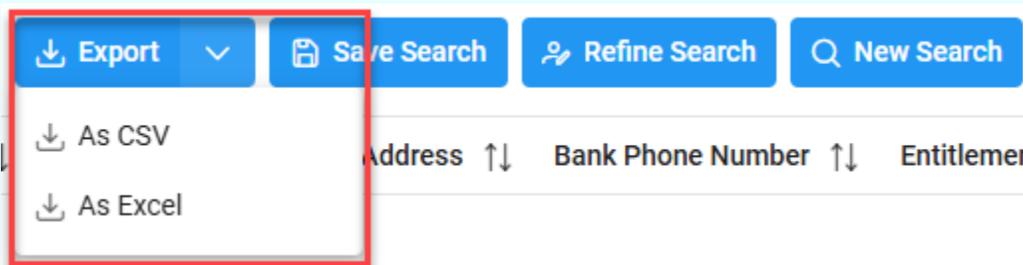
Buttons:

- Export
- Save Search
- Refine Search
- New Search

NOTE: The columns are sortable.

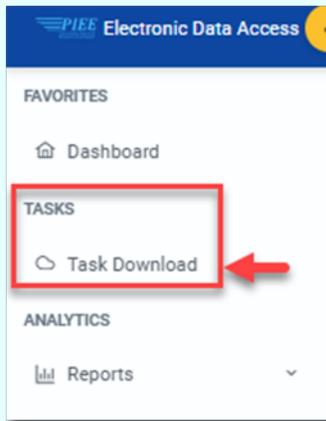
Exporting Search Results

Click the **Export** button on the search results page to export as CSV or Excel, a job runs to download the file.



Viewing Available Downloads of Reports:

In the navigation panel, under the Tasks menu, select **Task Download**.



The Job List page appears. Click the **Download** button in the Actions column.

Job List

Help Refresh

Job ID	Report Type	Start Date (UTC)	Finish Date (UTC)	Format	Status	Total Records	Actions
> 72518	Access_Online_By_User_Data_Report	4/8/25, 7:10 PM	4/8/25, 7:11 PM	EXCEL	FINISHED	67	Download

The Download Files pop-up appears with job details. Select the **Direct Download link** in the Direct Download (faster download) column.

Download Files

Job ID	Create Date (UTC)	Package Name	Size	Part	Direct Download (faster download)	Download via EDA App (slower download)
72522	4/8/25, 7:22 PM	Access_Online_By_Accessonline_Report_72522_1_20250408_192246_56b3b8f9-a533-4b6a-8c6d-3a72ef341d03.zip	0.013069 MB	1 / 1	Direct Download	

Part: If you don't see all the parts available then it means that the data are still being extracted. This usually happens for a huge amount of data extraction.

Download: Using 'Direct Download' will allow you to download artifacts in parallel and download speed will be significantly faster for large artifacts. Use 'Download via EDA App' option if you run into any firewall issue.

Exported zip files may need to have their names shortened to unzip due to a file path limitation in Windows.

[Close](#)

The file is downloaded to the local machine based on browser settings.

User Data Exported Report Columns:

- Appointee Organization Level (Home)
- Appointee Organization Code (Home)
- Service/Org
- Appointee Group Path
- Appointee First Name
- Appointee Last Name
- Appointee Email Address
- Appointee Designation
- Appointment ID
- Appointment Type
- Appointment Status
- Appointment Status Date
- Appointee Role Type
- Appointee Role Status
- Appointee Role Status Date
- Supervisor Email Address
- Nominator Group Path
- Nominator Email Address
- Direct User Type
- Direct User Email Address
- Direct User Group Name
- Direct User DoDAAC

- Authority Email Address
- Authority Role
- Service / Agency
- Service/Agency Shortname
- User ID
- User ID Status
- User ID Created By
- Last Login Date
- Name
- Bank Email Address
- Bank Phone Number
- Entitlement Group
- Level 1
- Level 2
- Level 3
- Level 4
- Level 5
- Level 6
- Level 7
- Agent
- Company Number
- Role DoDAAC/ID
- Cardholder Type
- Account Status
- Cardholder/Checking Account Last 4
- Cardholder/Checking Account Single Purchase Limit
- Cardholder/Checking Account Credit Limit
- Cardholder/Checking Account Daily Limit
- Cardholder/Checking Account Cycle Limit
- Managing Account Last 4
- Managing Account ID
- Managing Account Credit Limit
- Managing Account Cycle Limit
- Managing Account Quarterly Limit
- Managing Account Annual Limit
- Last Training Completed Name
- Last Training Completed Date
- Next Training Due Name
- Next Training Due Date
- Next Training Due Frequency
- Training Past Due Name
- Training Past Due Last Completed Date
- Training Past Due Date
- Training Past Due Frequency
- Last Course Completed Name
- Last Course Completed Date

- Nominator Organization Code
- Initiator Organization Code
- Authority DoDAAC
- Home DoDAAC
- Role Location DoDAAC
- Procurement DoDAAC

Access Online Exported Report Columns:

- Service / Agency
- Service / Agency Shortname
- User ID
- User ID Status
- User ID Created By
- Last Login Date
- Name
- Bank Email Address
- Bank Phone Number
- Entitlement Group
- Level 1
- Level 2
- Level 3
- Level 4
- Level 5
- Level 6
- Level 7
- Agent
- Company Number
- Role DoDAAC/ID
- Cardholder Account Type
- Account Status
- Cardholder/Checking Account Last 4
- Cardholder/Checking Account Single Purchase Limit
- Cardholder/Checking Account Credit Limit
- Cardholder/Checking Account Daily Limit
- Cardholder/Checking Account Cycle Limit
- Managing Account Last 4
- Managing Account ID
- Managing Account Credit Limit
- Managing Account Cycle Limit
- Managing Account Quarterly Limit
- Managing Account Annual Limit
- Appointee Organization Level (Home)
- Appointee Organization Code (Home)
- Appointee First Name

- Appointee Last Name
- Appointee Email Address
- Appointee Designation
- Supervisor Email
- Number of Active CPM Appointments
- Number of Active OA/OPC Appointments
- Number of Active AOPC Appointments
- Number of Active ABO Appointments
- Number of Active CO Appointments
- Number of Active CH Appointments
- Last Training Completed Name
- Last Training Completed Date
- Next Training Due Name
- Next Training Due Date
- Next Training Due Frequency
- Training Past Due Name
- Training Past Due Last Completed Date
- Training Past Due Date
- Training Past Due Frequency
- Nominator Organization Code
- Initiator Organization Code
- Authority DoDAAC
- Home DoDAAC
- Role Location DoDAAC
- Procurement DoDAAC

PIEE Data Exported Report Columns:

- Appointee Organization Level (Home)
- Appointee Organization Code (Home)
- Service Org
- Appointee Group Path
- Appointee First Name
- Appointee Last Name
- Appointee Email Address
- Appointee Designation
- Appointment ID
- Appointment Type
- Appointment Status
- Appointment Status Date
- Appointee Role Type
- Appointee Role Status
- Appointee Role Status Date
- Supervisor Email Address
- Nominator Group Path

- Nominator Email Address
- Direct User Type
- Direct User Email Address
- Direct User Group Name
- Direct User DoDAAC
- Authority Email Address
- Authority Role
- Last Training Completed Name
- Last Training Completed Date
- Next Training Due Name
- Next Training Due Date
- Next Training Due Frequency
- Training Past Due Name
- Training Past Due Completed Date
- Training Past Due Date
- Training Past Due Frequency
- Service / Agency
- Service / Agency Shortname
- User ID
- User ID Status
- User ID Created By
- Last Login Date
- Name
- Bank Email Address
- Bank Phone Number
- Entitlement Group
- Number of Card Accounts
- Number of Managing Accounts
- Nominator Organization Code
- Initiator Organization Code
- Authority DoDAAC
- Home DoDAAC
- Role Location DoDAAC
- Procurement DoDAAC

	A	B	C	D	E	F	G	
	APPOINTEE ORGANIZATION LEVEL (HOME)	APPOINTEE ORGANIZATION CODE (HOME)	SERVICE ORG	APPOINTEE GROUP PATH	APPOINTEE FIRST NAME	APPOINTEE LAST NAME	APPOINTEE EMAIL ADDRESS	APP
2		S0512A			Rhub	Talent	RhubTalent@dia.mil	MILIT
3		S0512A			Rhub	Talent	RhubTalent@dia.mil	MILIT
4		S0512A			Rhub	Talent	RhubTalent@dia.mil	MILIT
5		S0512A			Rhub	Talent	RhubTalent@dia.mil	MILIT
6		S0512A			Rhub	Talent	RhubTalent@dia.mil	MILIT
7		S0512A			Rhub	Talent	RhubTalent@dia.mil	MILIT
8		S0512A			Rhub	Talent	RhubTalent@dia.mil	MILIT
9		S0512A			Rhub	Talent	RhubTalent@dia.mil	MILIT
10		S0512A			Rhub	Talent	RhubTalent@dia.mil	MILIT
11		S0512A			Rhub	Talent	RhubTalent@dia.mil	MILIT
12		S0512A			Rhub	Talent	RhubTalent@dia.mil	MILIT
13		S0512A			Rhub	Talent	RhubTalent@dia.mil	MILIT
14		S0512A			Rhub	Talent	RhubTalent@dia.mil	MILIT
15		S0512A			Rhub	Talent	RhubTalent@dia.mil	MILIT
16		S0512A			Rhub	Talent	RhubTalent@dia.mil	MILIT
17		S0512A			Rhub	Talent	RhubTalent@dia.mil	MILIT
18		S0512A			Rhub	Talent	RhubTalent@dia.mil	MILIT
19		S0512A			Rhub	Talent	RhubTalent@dia.mil	MILIT
20		S0512A			Rhub	Talent	RhubTalent@dia.mil	MILIT
21		S0512A			Rhub	Talent	RhubTalent@dia.mil	MILIT