

## Reporting Concepts- N

Data reporting helps you make solid business decisions and can alert you to potential problems. This course will teach you how to locate Eagle reports and set them up to provide the needed output. You will also learn how to print a report and save the options for future use. Let's get started!

From the Eagle Browser, you can locate all reports under the Reports folder. These reports are organized into four categories- Accounts Receivable, Inventory, Purchasing and Receiving, and Point of Sale. Spooled Report Maintenance is also found in this folder. This topic is covered in another Training on Demand course.

We will begin by selecting Inventory Reports. This folder contains all the reports related to Inventory. If you want to determine the quantity and cost of the items you stock, select Inventory Valuation Report. You can also type RIV in the Launch Bar. It's helpful to note that almost all report acronyms begin with the letter R for Report.

Now that we've selected a report, it's time to set it up and print it. Every report has a similar look. The left side of the screen contains tabs giving you various options. Tabs include Print Setup, Options, From/To, Code Selection, Flexible Sort, and Fax Setup. Press Enter to move down the list of tabs or select each one individually using the mouse.

On the Print Setup tab, you can decide whether to print or spool a report, select which printer to send the output to, and decide how many copies are needed. There are three options available under Standard Options in the RIV report. Prepage shows which options were used during printing. A best practice is to always include a Prepage. Setting Totals Only to Yes, limits the report to subtotals and does not include item level detail.

Double Space puts an extra line in between the rows to make it easier to read. Additional choices may be available in other reports. Now let's take a look at Options.

Start by selecting which Cost to use. For an Inventory Valuation, use Average. You can then choose from several other options and determine which units to print. These options will vary from report to report. Some of them can make changes to your system data. Make sure you understand each option before selecting it.

The From/To section defines the amount of information that will be used in a report. If left blank on an RIV, all inventory data will be included. Print Sequence determines how the resulting document will be sorted. Subtotals and Start New Page work together.

Select Y for Subtotals to view the subtotals of each section. Choose Y for Start New Page if you want a new page after each subtotal. To select a specific range of departments, enter a starting and ending department in the Department fields. To report on one department, select the same department in both the From and To fields.

Choosing the right Print Sequence and From/To fields makes the report more meaningful and the data easier to analyze. Code Selection allows you to further control the report output by including or excluding SKU codes. For example, if we type A in the Popularity Code box and leave the Exclude? field set to N, only items with a Popularity Code of A will be used in the report.

If we change the Exclude? field to Y, then the report will use only those SKUs that do not have a Popularity Code of A. Flexible Sort allows you to determine which fields trigger a page break or subtotal entry. And the Fax Setup tab allows you to fax the resulting document.

Once you have set up the report, you may want to save it and use it again. Select Save or press F5. Type a useful description for your report and press Save. The next time you wish to run this specific report with the same options, select Open or press F6. Choose the report and press Open.

To make a specific report the default, select Miscellaneous and click Choose Default Report Profile. Press Change, then select the default report profile from the list that appears. Now click Open. Press OK to complete the setup. Your

selection will now be the default and these options automatically filled in when the report is open.

Finding and printing reports is a straightforward process. You should now be able to open, edit and save them. Following this process will ensure that your reports are run efficiently and give you exactly the data you need every time.

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