System Auditing and Reporting Tools Overview

Knowing exactly what has happened to your Eagle data is a crucial part of running your business. System Audit and Reporting Tools, or SART, can help you monitor this by allowing you to see records and reports from any point in your system history.

This course will explore the many benefits associated with SART and talk about why we use it. It will also review some of the SART change viewers, take a look at the archived report feature and tour the Inventory Transaction Register.

SART allows you view inventory records from a given point in time. With visibility to quantity and cost changes you get a clear picture of your average cost history. Increases from purchases, reductions from sales and even manual changes are stored in a familiar grid. SART also keeps track of all changes that are made to customer records, vendor records and option ID's.

This can be helpful when identifying who made a change, at which terminal and with what process. Help documentation is available on all of these viewers in the Course Materials section of this class. Being able to identify who has updated your data is also beneficial for the protection of sensitive information. If you discover that someone is not following store procedures, you can alter their security and prevent any further changes from being made.

SART also takes advantage of the Spooler Archive. The Spooler Archive allows you to view all reports that were spooled regardless of their age. The change viewer helps you to see what information has been altered in master data files. This includes inventory, customer records and vendor files. Start by accessing the appropriate maintenance screen.

In our example we'll open Inventory Maintenance. Identify a SKU and press Enter to display it. Click Go To from the ribbon menu. Under the Viewers heading, select Inventory Maintenance Changes. This screen will display all changes made to this SKU.

The viewer contains the SKU, date, time and store the change occurred in. It will also specify what changed. The last two columns will identify where the change took place and who made it. As with other viewers, you can add or change the columns to view.

You can view another SKU by typing a different one in the box and pressing enter. You can also search data changes by date. Simply select the By Date hyperlink.

The same fields are listed but are shown in Date order. When searching by date, you can narrow your search to a specific change type. Use the Fields dropdown menu to isolate the “What Changed” field. In the What Changed column, double click any field with an asterisk next to its name to view more information.

Here you can see all the information about the item related to Stocking, Pricing, Codes, and History. You can also print from this screen. This same information can be found in from the Customer Maintenance and the Vendor Maintenance Screen.

Archived Reports help keep a record of your business. Archives are kept for Spooled Reports, AR Transactions and Purchase Orders. Use the Spooler Archive hyperlink to view older reports. Select a date range to display. You can also search for a specific report by name.

As with Spooler Maintenance, double click a report to view it. You can print if needed. Customer Maintenance also allows you to view the Customer Statement Archive and the Archived Point of Sale Documents. Use the Statement Archive to view previously generated statements. The archive is created whether you use email or traditional mail.

With the Archived Point of Sale Documents Viewer you can access any documents created at the register. From Customer Maintenance, select Go To and Archive POS Documents. You can double click on any entry to view the document created at Point of Sale.

Using the PO Archive viewer can be useful if you need to determine whether an order was only partially filled or came in completely. Here we see Order 138 is still open and has not yet been received.

Entries from the PO Archive viewer can also be exported and imported into a new purchase order. This can save you time if you order the same merchandise multiple times. The Inventory Transaction Register, or ITR, records all changes to your inventory.

Entries are created when there is a change in cost, retail price, quantity, unit of measure, order multiple, or standard pack. To view the Inventory Transaction Register, type ITR in the Eagle Launch Bar and press enter. Narrow the results by entering a SKU along with a date range and then press Display. Now you can see all of the transaction changes that have occurred with this SKU. For example, when an item is first added, its average price appears. If at a later point, the purchasing price for the item changes, the average cost will reflect it.

System Auditing and Reporting Tools makes your data transparent and easy to monitor. You've seen how to use Change Viewers and Archived Reports to track what is happening on your system as well as changes to your inventory in ITR. You should now be better equipped to keep track of and regulate changes that are happening in your business.

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