



ERP Reporting & Analytics Checklist

Data Source Validation

Verify accuracy and completeness of data feeding into ERP reports.

Data Source Connection Status

- ☐ Connected
- ☐ Disconnected
- ☐ Error

Last Data Sync Timestamp (Epoch)

Enter a number...

Data Source Last Modified Date

Enter date...

Data Source Error Log (If Applicable)

Write something...

Record Count in Data Source

Enter a number...

Data Type Validation Status

- ☐ Valid
- ☐ Invalid
- ☐ Pending Validation

Report Design & Customization

Ensure reports meet specific business requirements and are visually clear.

Report Layout Type

- ☐ Standard
- ☐ Custom

Chart Types Included

- ☐ Bar Chart
- ☐ Line Chart
- ☐ Pie Chart
- ☐ Scatter Plot
- ☐ Table

Custom Branding Notes (Logo, Colors)

Write something...

Number of Decimal Places

Enter a number...

Currency Display Format

- ☐ Symbol First
- ☐ Value First

Last Report Design Update Date

Enter date...

Data Security & Access Control

Confirm appropriate user permissions and data masking for sensitive information.

Role-Based Access Controls Implemented?

- ☐ Yes
- ☐ No
- ☐ Partial

Sensitive Data Masking Applied to?

- ☐ Customer PII
- ☐ Financial Data
- ☐ Employee Records
- ☐ Inventory Details
- ☐ Other

Two-Factor Authentication Enabled?

- ☐ Yes
- ☐ No
- ☐ Partial

Number of Users with Admin Privileges

Enter a number...

Description of Data Encryption Methods

Write something...

Regular Security Audits Performed?

- ☐ Yes
- ☐ No
- ☐ Scheduled

Report Performance & Optimization

Evaluate report generation time and identify opportunities for performance improvements.

Maximum Acceptable Report Generation Time (seconds)

Enter a number...

Current Average Report Generation Time (seconds)

Enter a number...

Database Server Optimization Status

- ☐ Not Optimized
- ☐ Partially Optimized
- ☐ Fully Optimized

Describe any bottlenecks identified during performance testing

Write something...

Performance Optimization Techniques Implemented

- ☐ Indexed Data Fields
- ☐ Query Optimization
- ☐ Server Resource Allocation
- ☐ Report Caching

Date of Last Performance Optimization Review

Enter date...

Report Distribution & Scheduling

Define automated distribution schedules and delivery methods.

Distribution Method

- ☐ Email
- ☐ Shared Drive
- ☐ ERP Dashboard
- ☐ Other

Recipient Groups

- ☐ Executive Team
- ☐ Department A
- ☐ Department B
- ☐ Finance Team
- ☐ Sales Team

First Scheduled Run Date

Enter date...

Scheduled Run Time

Enter time...

Frequency (Days)

Enter a number...

Custom Distribution Notes

Write something...

Data Quality Monitoring

Implement checks to maintain data accuracy and integrity over time.

Data Completeness Rate (%)

Enter a number...

Data Accuracy Rate (%)

Enter a number...

Data Consistency Rate (%)

Enter a number...

Last Data Quality Check Date

Enter date...

Summary of Data Quality Issues Found

Write something...

Data Validation Rules Applied

- ☐ Range Checks
- ☐ Format Checks
- ☐ Duplicate Checks
- ☐ Referential Integrity Checks

Data Quality Issue Severity (Low/Medium/High)

☐ Low

☐ Medium

☐ High

Key Performance Indicator (KPI) Alignment

Verify reports accurately reflect and support defined KPIs.

KPI Definition Source

☐ Company Strategy Document

☐ Departmental Goals

☐ Industry Best Practices

KPI Formula/Calculation

Write something...

Target Value for KPI

Enter a number...

Actual Value (Current Period)

Enter a number...

KPI Status

- ☐ On Track
- ☐ Needs Attention
- ☐ Off Track

Analysis of KPI Variance (vs. Target)

Write something...

Date of Last KPI Review

Enter date...

Audit Trail & Reporting Compliance

Ensure proper audit trails exist and reports adhere to regulatory requirements.

Last Audit Trail Review Date

Enter date...

Summary of Audit Findings

Write something...

Number of Audit Trail Accesses (Last Month)

Enter a number...


Relevant Regulatory Compliance Standards (e.g., GDPR, SOX)

- ☐ GDPR
- ☐ SOX
- ☐ HIPAA
- ☐ CCPA
- ☐ Other

Description of Compliance Measures

Write something...

Supporting Documentation (e.g., audit reports, compliance certifications)

 Upload File

User Training & Documentation

Provide adequate training and documentation for users accessing and interpreting reports.

Training Objectives Overview

Write something...

Training Modules Covered

- ☐ Module 1: Core Functionality
- ☐ Module 2: Reporting & Analytics
- ☐ Module 3: Data Entry Best Practices
- ☐ Module 4: Security and Compliance

Training Completion Date

Number of Training Hours

Training Materials (PDF, DOCX)

 Upload File

Trainer Name

User Feedback Summary

Report Review & Updates

Schedule regular reviews of reports to ensure they remain relevant and accurate.

Last Review Date

Review Summary & Key Findings

Write something...

Areas Requiring Updates/Changes

- ☐ Data Source
- ☐ Calculations
- ☐ Report Design
- ☐ Data Security
- ☐ KPI Alignment
- ☐ Other

Justification for Changes

Write something...

Implementation Date of Changes

Enter date...

Review Status

- ☐ Not Started
- ☐ In Progress
- ☐ Completed
- ☐ Deferred

Version Number

Write something...