



Warehouse WMS Reporting Checklist Template

Report Configuration

Verify proper setup and parameters for standard WMS reports.

Standard Report Type

- ☐ Inventory Summary
- ☐ Order Fulfillment
- ☐ Receiving Log
- ☐ Shipping Manifest
- ☐ Cycle Count Results

Record Start Date (for Date Range Reports)

Enter a number...

Record End Date (for Date Range Reports)

Enter date...

Number of Records to Include

Enter a number...

Included Data Fields

- ☐ Item Number
- ☐ Description
- ☐ Quantity
- ☐ Location
- ☐ Cost
- ☐ Date

Report Format

- ☐ CSV
- ☐ Excel
- ☐ PDF

Custom Filters/Criteria (optional)

Write something...

Data Accuracy & Completeness

Confirm report data aligns with physical inventory records and system transactions.

Inventory Quantity Discrepancy (Units)

Enter a number...

Value of Discrepancy (USD)

Enter a number...

Description of Discrepancy

Write something...

Reason for Discrepancy

- ☐ Data Entry Error
- ☐ System Glitch
- ☐ Physical Loss
- ☐ Theft
- ☐ Miscount

Date of Discrepancy Identified

Enter date...

Time of Discrepancy Identified

Enter time...

Supporting Documentation (e.g., Cycle Count Sheet)

 Upload File

Report Scheduling & Delivery

Ensure scheduled reports are generated and delivered on time, to the correct recipients.

Report Start Date

Enter date...

Report Generation Time

Enter time...

Delivery Method

- ☐ Email
- ☐ Shared Folder
- ☐ FTP

Recipient Email Address(es)

Write something...

Number of Recipients

Enter a number...

Report Frequency

- ☐ Daily
- ☐ Weekly
- ☐ Monthly
- ☐ Ad Hoc

Next Scheduled Run Date

Enter date...

User Access & Permissions

Confirm appropriate user access controls are in place for report access and modification.

Report Viewer Group Assignment

- ☐ Warehouse Management
- ☐ Finance
- ☐ Executive Team
- ☐ Shipping Department

Data Export Permissions

- ☐ Read-Only
- ☐ Read/Write

Report Access Levels

- ☐ Standard Reports
- ☐ Custom Reports
- ☐ Historical Data
- ☐ Real-Time Data

Maximum Concurrent Users

Enter a number...

Last Access Review Date

Enter date...

Report Performance & Optimization

Assess report generation time and identify potential optimization opportunities.

Average Report Generation Time (seconds)

Enter a number...

Peak Report Generation Time (seconds)

Enter a number...

Database Query Response Time (seconds)

Enter a number...

Report Server Resource Utilization (%)

- ☐ Low
- ☐ Moderate
- ☐ High

Detailed Notes on Performance Issues

Write something...

Index Optimization Needed?

- ☐ Yes
- ☐ No
- ☐ Unknown

Date of Last Performance Review

Enter date...

Report Customization & Validation

Validate any custom reports for accuracy and usability.

Describe the custom report's purpose and intended use.

Write something...

Expected report generation time (in seconds).

Enter a number...

Data source(s) used by the report.

- ☐ Primary Database
- ☐ Secondary Database
- ☐ Third-Party Integration

Which fields are included in the report?

- ☐ Item ID
- ☐ Quantity
- ☐ Location
- ☐ Date Received
- ☐ Shipped Date

Date of last customization.

Enter date...

Describe any validation rules applied to the report's output.

Write something...

Audit Trail & Logging

Verify logging of report generation and access for audit purposes.

Last Audit Trail Review Date

Enter date...

Number of Audit Log Entries Reviewed

Enter a number...

Summary of Audit Log Findings

Write something...

Audit Trail Access Control Review

- ☐ Satisfactory
- ☐ Needs Improvement
- ☐ Unsatisfactory

Time of last audit trail extraction

Enter time...

Description of any anomalies detected in audit logs

Write something...