[A green sign with white text

Description automatically generated](https://www.smartsheet.com/try-it?trp=11990&utm_source=template-word&utm_medium=content&utm_campaign=Reporting+Requirements-word-11990&lpa=Reporting+Requirements+word+11990)**REPORTING REQUIREMENTS**

**TEMPLATE**

REPORTING REQUIREMENTS

1. Report Overview

|  |  |
| --- | --- |
| REPORT  NAME | [Report Name] |
| REPORT PURPOSE /  GOAL | Briefly describe what the report should achieve. |
| AUDIENCE | Identify who will read this report (e.g., management, stakeholders, team members). |
| FREQUENCY | Specify how often you will generate the report (e.g., daily, weekly, monthly). |
|  |  |

|  |  |  |
| --- | --- | --- |
| VERSION | DATE | REPORT OWNER / AUTHOR |
|  |  |  |

1. Data Requirements

|  |  |
| --- | --- |
| DATA SOURCES |  |
| List all the data sources that you will use to compile the report (e.g., databases, spreadsheets, external data). |
| DATA COLLECTION METHOD |  |
| Describe how you will collect the data (automatically, manually, or via a third-party service). |
| DATA UPDATE FREQUENCY |  |
| Indicate how often you will update/refresh the data. |

1. Content Requirements

|  |  |
| --- | --- |
| KEY METRICS / INDICATORS |  |
| List all the metrics or performance indicators that you will include in the report. |
| DATA BREAKDOWNS |  |
| Specify whether or not you will break down the data by categories (e.g., time, department, geography). |
| HISTORICAL DATA COMPARISON |  |
| State whether or not the report will compare current data to historical data for trend analysis. |

1. Format and Layout

|  |  |
| --- | --- |
| REPORT FORMAT |  |
| Indicate the format you will be using (e.g., PDF, Excel, web-based dashboard). |
| LAYOUT |  |
| Describe the layout or provide a sketch. (Include charts, tables, text sections, etc.). |
| VISUAL ELEMENTS |  |
| Identify any charts, graphs, or visual elements that you will include in the report. |

1. Delivery Method

|  |  |
| --- | --- |
| DISTRIBUTION METHOD |  |
| Indicate how you will distribute the report to the audience (e.g., email, online portal, print). |
| SECURITY / CONFIDENTIALITY REQUIREMENTS |  |
| Include any requirements for handling sensitive or confidential information. |

1. Approval and Review Process

|  |  |
| --- | --- |
| REVIEWERS |  |
| List the individuals or groups responsible for reviewing the report before distribution. |
| FEEDBACK PROCESS |  |
| Describe how you will collect feedback and incorporate it into future reports. |
| APPROVAL PROCESS |  |
| Identify who must approve the report before you distribute it. |

1. Implementation Plan

|  |  |
| --- | --- |
| TIMELINE |  |
| Include all the key milestones and deadlines you have to reach in order to develop and distribute the report. |
| RESOURCES REQUIRED |  |
| Include any tools, subscriptions, or other resources you need to produce the report. |
| RESPONSIBLE PARTIES |  |
| Indicate who is responsible for each aspect of the report's development, analysis, and distribution. |

1. Revision History

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| --- | --- | --- | --- |
| VERSION | DATE | REVISIONS APPLIED | REVISED BY |
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