ERP reporting acceptance checklist

Record the evidence, name an owner and agree the next action.

Organisation: _____ Owner: _____

System / workflow: _____ Review date: _____

- [ ] Name the decisions each report must support.
- [ ] Define project, date, status and priority fields.
- [ ] Identify the owner and source of every reported value.
- [ ] Agree filters and empty-state behaviour.
- [ ] Set role-based viewing and export permissions.
- [ ] Reconcile displayed counts and calculations to source records.
- [ ] Test team workload and allocation definitions.
- [ ] Test budget fields with representative approved data.
- [ ] Verify exports and confidential-data handling.
- [ ] Agree acceptance, deployment and ongoing support.

Evidence / decisions / next actions

Read the guide and check the references before using this worksheet:
dyaustechnoservices.com/erp-project-reporting-walkthrough/

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