Your Company Name

Report Design Template

For

Name of Report

Date

Revision History

Date	Version	Author	Change

Table of Contents

Note: Text displayed in blue italics is included to provide guidance to the author and should be deleted before publishing the document. In any table, select and delete any blue line text; then click Home→Styles and select "Table Text" to restore the cells to the default value.

1 Purpose

Purpose describes the intent of the document, which is to provide detailed business and technical information for designing and developing a report. This section includes the following information:

- *Product or system name.*
- *Functions associated with the product or system.*
- *Reports to be designed or developed associated with the product or system.*
- *Field information.*

2 Product or System Information

This section of the document should contain background information about the reports associated with the product or system.

2.1 Product or System Overview

Provide an overview of the product or system and the environment in which it is currently used.

- *Indicate the products, systems, databases, and processes that interface with it.*
- *Provide diagrams or examples, if necessary.*

2.2 Report Design or Development Reason and Description

Provide a description and reason why the report is being designed or developed, e.g.,

- *New or modified process or need for certain information.*
- *Number of new or modified reports.*
- *Associated functions and processes.*
- *Associated reports.*
- *Tables and Databases involved.*
- *Special or unique processes, functions, fields or actions.*

2.3 Assumptions, Dependencies, and Constraints

List assumptions, dependencies, and constraints that could constrain the design or development tasks, e.g., completion of a specific task, product or software availability or access.

2.4 Stakeholders

Provide information about who the Stakeholders are and their respective roles.

Name	Department	Role
John Smith	Information Technology	Manager

2.5 Risks

Provide information about any risks associated with the design or development, if any. Provide any work-around or mitigation information for each risk identified.

2.6 Implementation Dates

Provide a list of high-level tasks or deliverables and their associated target dates.

Tasks / Deliverables	Target Date

3   Report Details

Basic Report Information:

Report Name	
Report Description	
Intended Audience	*Who is the report for (e.g., a specific department or user type)?*
Security / Access	*Indicate any restrictions on who can access running and displaying the report (e.g., by department, level, or person).*
Frequency	*Indicate if the report is run daily, weekly, monthly or on a specific date or time and if run automatically or on demand.*
Who can run this report	*Indicate the specific department, level, or person.*
Where is the report run	*Indicate if the report is run by a specific technical department, on a mainframe/server/PC, by a user on their local computer, and/or from a remote site.*

Report Input Parameters and Selections:

List each field or selection criteria (e.g., department, region, sales/transaction date or range, etc.) to extract and generate the report.

Selection Input Parameters	Input Data Type (e.g., number, text, date)	Text Input

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Report Fields:

List each field that will be listed on the report.

Field Names on the Report	Description	Indicate Database or Table data is from (if known)	Is Field Result based on a calculation (Y/N)	If yes, describe the formula / calculation and/or function it comes from

Note: Indicate any group calculations, sub-totals, and grand totals.

Group Field Information:

Indicate any group of data, e.g., by state, region, sales area, salesman, etc.

Report Group Fields (by):	Description of Grouping	Print Group Name in Group Header and/or Footer (Y/N)

Note: Indicate any group calculations, sub-totals, and grand totals.

Sort Order Information:

Indicate any special or unique sorting of information, including sorting within a group, e.g., by state, region, sales area, salesman, etc.

Report Sort Fields	Description of Sort Field	How is Sort Performed (ascending, descending, other-explain)
1		
2		
3		
4		
5		

Page Header and Footer Information:

Indicate what should appear on the top and bottom of each report page.

Topic	Description of Report Header and Footer Information
Page Header	
Page Footer	

Report Sample:

Provide a sample copy of the report(s).