Data-room index template

Track who requested each file, its coverage, access status and the evidence a reviewer used to close the request.

Shop / location

Review date

Prepared by

Build a controlled index

☐ Issue stable IDs

Give each request a distinct ID. Keep revisions attached to the same request and include a date in the version field.

Evidence / next action

☐ Limit early disclosure

Use anonymized records for first-pass questions. Record the release group before you add a sensitive file reference.

Evidence / next action

☐ Name an owner

Choose the person who can explain the evidence. Avoid forwarding portal credentials or listing passwords in the index.

Evidence / next action

Open item, responsible person and due date

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Track who requested each file, its coverage, access status and the evidence a reviewer used to close the request.

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Close the loop

☐ Check coverage

Enter the period or as-of date. Compare the requested months with the actual export and flag gaps.

Evidence / next action

☐ Distinguish upload and review

Set status to Received once the file arrives. Use Reviewed only after recording the reviewer and result.

Evidence / next action

☐ Keep superseded versions legible

Record a replacement reference and date when the seller supplies a fresh report. Preserve what was shared with earlier reviewers.

Evidence / next action

Open item, responsible person and due date

Request register

Data-room index template

Shop / location

Review date

Prepared by

Blank worksheet

Maintain the existing request IDs. Replace the category and request details as needed. Add the secure file reference before marking a request reviewed.

Request register	Record A	Record B	Record C
Request ID			
Category			
Requested item			
Period or as-of			
Owner			
Due date			
Status			
Release group			
File / version			
Reviewer			
Disposition or exception			
Follow-up			

Evidence reference and assumptions