Data-room index template

Index diligence requests without placing customer records, employee files or live access credentials inside the index.

How to use this file

1. Use one row per request and a relative folder reference. Store the sensitive material in your access-controlled room.
2. Set a due date, responsible owner and review status. A received file stays open until someone checks the requested period and completeness.
3. At handoff, export a dated copy and provide access through the room administrator.

Shop or transaction _____

Prepared by _____

Period and cutoff date _____

> Educational planning template. Verify your figures and assumptions with your transaction advisors.

The editable register has space for 100 records. Use the same units and time period for each row.

Record worksheet

Print one sheet for each record. Use the editable workbook to calculate the derived fields across your register.

Request / item _____

Folder reference _____

Period _____

Request owner _____

Due date _____

Review status _____

Reviewer _____

Exception / next action _____

Timing _____