

Project Management Pack



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Project Management Pack is an extensive library of material used to help manage your projects from start to finish. Project Management Pack also includes the Records Management Toolkit for developing a detailed records management program.

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Records Inventory Worksheet Questionnaire for Business Units

The purpose of the records inventory is to develop and maintain an Information Management Policy for the Records Management Program. The inventory will determine records and non-records, location of the corporate records, and help in categorizing and managing the records life cycle.

1. << Define the inventory's goals. Goals may include: defining in-place records management, creating applications in content management software, consolidating records stores, migrating, preparing for conversion to other media, or identifying particular records management problems. >>
2. << Define the scope of the inventory. Is the inventory for a department or for the enterprise? Should the inventory include all records and other transient materials, or just records to be managed to disposition? >>
3. << Define the data to be collected and the type of inventory. How you will collect data and who you plan to use as a resource. Is it a physical inventory with interviews or just a questionnaire? >>
4. << Use the **Records Management Survey** document's questions to learn where the organization's files are located, both physically and organizationally. Copy the table for each records series. >>
5. << Verify and analyze the results. Use

The rest of the content has been removed from this sample. The entire 3 pages of the document are included in:

[Proposal Kit Professional](#)



S A M P L E

This sample has been truncated to only show a portion of the content. The complete editable version of this document is included in Proposal Kit Professional at:

<http://www.proposalkit.com/htm/proposal-software-products.htm>