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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

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