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Records Survey and Inventory Analysis

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

1. **Goals:** << 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. **Scope:** << Define the scope of the survey and 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. **Business Unit Survey:** << Define the data to be collected and the type of inventory. How you will collect data and who will be used as a resource. Is it a physical inventory with interviews or just a questionnaire? Include a summary of stakeholders and business units surveyed. >>
4. **Location:** << Use the Records Management Inventory Form and Survey Questions to learn where the organizations files are located, both physically and organizationally. >>
5. **Analysis:** << Verify and analyze the results of the survey and

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