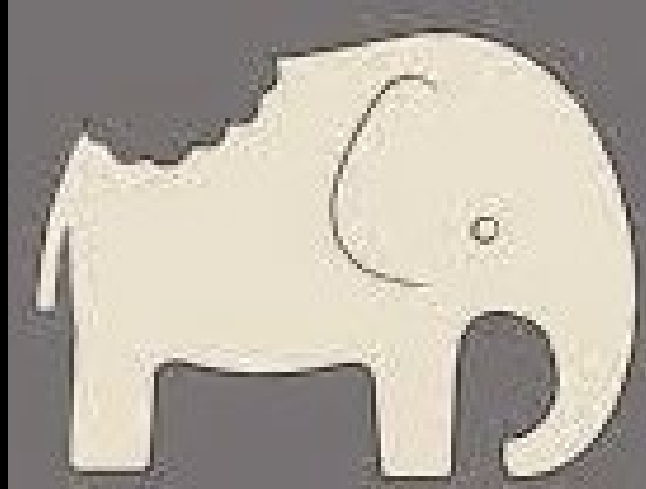


How do we eat an elephant...



One bite at a time

Records Inventory Training



Course Outline



1. Find records in all locations



2. Determine if you are the record holder



3. Determine types of records



4. Determine goals and scope



5. Complete Records Inventory Worksheet



Find records in all locations 😊

Where to look for records:

- Sticky notes
- Desk drawers
- Notebooks
- File cabinets
- Boxes
- Storage rooms



Am I the record holder?

- You created or originated it.
- It includes administrative instructions for you to do something.
- You or your office keep this type of record as part of your job function.



You have submitted an official identical copy of the record elsewhere

Determine types of records



**OFFICIAL
RECORD**



**CONVENIENCE
COPY**



**ARCHIVAL
RECORD**

Determine goals and scope

Map



Is it so you can develop a retention schedule?

Road



Is it to find out what records you can get rid of?

Mountain



Is it because you want to make sure your record keeping is in compliance with TAMUS, state and federal laws?

Complete Records Inventory Worksheet

- Gather documents by series number
- Determine retention period for records
- Arrange records from shortest retention period to longest retention period
- If records have expired per records retention schedule, prepare documents for destruction (covered in a different training course)
- Complete worksheet for each series number

RECORDS INVENTORY WORKSHEET		
Texas State Library – State and Local Records Management Division		
RMD 103 (11/07)		
1. AGENCY NAME AND DIVISION _____		
2. DEPARTMENT / SECTION / UNIT _____		3. LOCATION OF RECORDS AND/OR FILE CODE _____
4. NAME AND TITLE OF PERSON RESPONSIBLE FOR MAINTAINING RECORDS _____		5. TELEPHONE _____
RECORDS SERIES IDENTIFICATION		
6. WORKING RECORDS SERIES TITLE _____		
7. DESCRIPTION (Summary of contents: function of records; form numbers, if any. Continue description on reverse side if needed.) _____		
8. STATUS <input type="checkbox"/> RECORD COPY <input type="checkbox"/> CONVENIENCE COPY	9. RECORD MEDIUM <input type="checkbox"/> PAPER (SPECIFY SIZE) _____ <input type="checkbox"/> MICROFORM – SPECIFY _____ <input type="checkbox"/> ELECTRONIC – SPECIFY _____ <input type="checkbox"/> MAPS, DRAWINGS _____ <input type="checkbox"/> COMPUTER PRINTOUT _____	10. ARRANGEMENT <input type="checkbox"/> ALPHABETICAL <input type="checkbox"/> NUMERIC <input type="checkbox"/> ALPHA-NUMERIC <input type="checkbox"/> OTHER-SPECIFY _____ <input type="checkbox"/> SUBJECT <input type="checkbox"/> GEOGRAPHICAL <input type="checkbox"/> CHRONOLOGICAL
11. VOLUME (IN CUBIC FEET) CURRENT TOTAL _____ ANNUAL ACCUMULATION RATE _____	12. ESTIMATED ACTIVITY PER FILE DRAWER FOR HOW LONG? HIGH (DAILY) _____ MEDIUM (WEEKLY TO MONTHLY) _____ LOW (LESS THAN ONCE A MONTH) _____	13. RESTRICTIONS <input type="checkbox"/> LEGAL <input type="checkbox"/> VITAL (ESSENTIAL) <input type="checkbox"/> CONFIDENTIAL <input type="checkbox"/> ARCHIVAL <input type="checkbox"/> SUBJECT TO AUDIT
14. STORAGE <input type="checkbox"/> FILING CABINET <input type="checkbox"/> ROLLED <input type="checkbox"/> FLAT <input type="checkbox"/> OTHER-SPECIFY _____ <input type="checkbox"/> BOXED <input type="checkbox"/> SHELVING	15. CURRENT RETENTION PERIOD ACTIVE (IN OFFICE) _____ INACTIVE (IN STORAGE) _____	16. INCLUSIVE DATES FROM _____ TO _____
17. INFORMATION MAINTAINED ON MORE THAN ONE MEDIUM (EXPLAIN) _____		
18. INFORMATION DUPLICATED ELSEWHERE (EXPLAIN) _____		
19. INFORMATION SUMMARIZED ELSEWHERE (EXPLAIN) _____		
20. NAME AND TELEPHONE NUMBER OF PERSON TAKING INVENTORY _____		21. DATE OF INVENTORY _____
FOR USE OF AGENCY RECORDS MANAGEMENT OFFICER		
22. OFFICIAL RECORDS SERIES ITEM NUMBER _____	23. OFFICIAL RECORDS SERIES TITLE _____	
24. OFFICIAL RECORDS RETENTION PERIOD REFER TO THE TEXAS STATE LIBRARY RECOMMENDED RECORDS RETENTION SCHEDULE (RRS) FOR RECOMMENDED RETENTION PERIODS	ACTIVE (IN AGENCY) _____ INACTIVE (IN STORAGE) _____ TOTAL _____	BASIS FOR RETENTION PERIOD <input type="checkbox"/> RRS – ITEM # _____ <input type="checkbox"/> STATUTE - # _____ <input type="checkbox"/> AGENCY POLICY - # _____ <input type="checkbox"/> OTHER – SPECIFY _____



First

Find records

Second

Are you the record holder

Third

3 types of records

Fourth

Goals and scope

Fifth

Records Inventory Worksheet

Records Inventory Summary

Here is what we learned

Records Management Program

1. Records Management Basics

2. Records Inventory

3. Records Retention Review

4. Records Disposition

5. Electronic Records Management





Thank You!

Please contact AR-EHS
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806-651-2270 for more
information.