# 2. File Inventory Review

***What?*** Create a records inventory of your shared drive file folder system; include as much or as little detail as needed.
***Why?*** This inventory may be used to review and organize information about the folder contents, identify retention requirements of the records, and assist the disposition process for your clean-up project. It may also be used in the process of cleaning up and organizing your files, or to document and maintain your clean file structure.
***Time?*** 8-30 hours. Dependent upon knowledge of records and size of file system. Likely requires communication and gathering information from others.

1. Create a spreadsheet that lists the parent folders on your drive. (Column A, below) This can be done manually, or using the TreeSize software, available from the KCIT Software Center.

2. Describe the contents of each of these folders, as much or as little as necessary. Include the function of the records – what they are used for. For this step, it may require communication with other work units and staff to properly identify the folder and contents. Questions to consider: What are the records used for? What is their purpose? Are they originals, or copies used for reference? Are they still being used? (Column B, below)

3. Use your retention schedule to identify the record series of each folder, or subfolders if necessary. (Column C, below)

4. Identify the inclusive years of the records in the folder. (Column E)

5. This inventory is intended to assist in your clean-up process. Use this list to identify the appropriate actions to take on the existing folders and contents. Based upon the record series retention and the inclusive years of your records, identify which records:
    - are transitory and can immediately be destroyed;
    - are inactive – have passed their retention requirements (Column D);
    - have archival value (Column D)
    - Communicate with the appropriate staff for additional input or review.
    - Based upon information for each folder, note which action needs to be taken in the last column. (Column F): Delete transitory records, file inactive electronic records to Content Manager, move records to another folder, disposition (destroy or archival transfer) records that have passed their retention requirement.
    - This inventory can also be used as an inventory of records for disposition. See "Clean-Up Guide 4: Disposition".



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*Example Spreadsheet:*

| A | B | C | D | E | F |
|---|---|---|---|---|---|
| **Z:/ Drive PARENT FOLDERS** | **Description: What are the records and how are they used?** | **Record Series (from the retention schedule)** | **Active, passed retention, archival?** | **Inclusive years; dates of disposition eligible records.** | **Action to take** |
| **Reference Library** | Reference publications and guides used by RM staff. Not created by RM staff, generally from the state. | Transitroy; destroy when no longer needed. | N/A | 1998-2018 | Deleted files no longer used |
| **Records Management Projects** | Projects managed by the Records Management Program. Used as project files | "Project Files" (GS50-01-39R1); 6 years after project closed | Includes active, inactive, and passed retention project files. Records are potentially archival. | 2006-2019; Projects closed 2013 and prior eligible for disposition | 1) contact the archivist, 2) file inactive records, 3) destroy records passed retention |
| **Training** | Training folders: includes powerpoints and handouts, and sign in sheets | "Agency Provided Trainings" (GS2011-181R1); 3 years after date training provided. | Includes active and inactive records. Not archival | 2015 training and prior eligible for disposition | 1) file inactive records, 2) destroy records passed retention |