## Identify what specific metadata is needed to manage an electronic record through its lifecycle

## Instructions for Using This Job Aid

*Use this job aid when you are assigned to identify what specific metadata is needed to manage an electronic record through its lifecycle. Check off each step when you have completed the step.*

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| **Procedure** | **Actions/Decisions** |  |
| **1. Identify records series within the organization containing electronic (e) records.** | 1. Perform a business analysis within the applicable organizational unit(s). | ☐ |
| 1. Examine business process workflow(s) resulting from the analysis for potential e-records creation or receipt. | ☐ |
| 1. Review existing file plans for additional record/records series | ☐ |
| 1. From information collected in Steps 1.1-1.3 create a list of record creators by organizational group/unit. | ☐ |
| **2. Within each identified records series, determine how component information objects (text documents, e-mail, images, databases, digital photographs, etc.) are going to be described, organized (alphabetically, numerically, chronologically, by subject, etc.), searched and used.** | 1. Using list from step 1.4, interview subject matter experts (SMEs), records creators, and end users in each organizational group/unit. Collect and record data on:  * What records are created? * What terms are used and their frequency? * How each user views how potential metadata will be used to describe each object (record or series of records) and preserve it over time. * How records will be searched, accessed, and retrieved over their life cycle | ☐ |
| 1. Search the records in each organizational group/unit (independent of the office staff) for additional key/repetitive terms, office codes, etc. not already collected from user interviews. | ☐ |
| 1. Record the data found in Step 2.2 | ☐ |
| **3. Record and analyze collected data.** | 1. Create a list of all collected data in Subtask 2. | ☐ |
| 1. Match terms with related records/records series | ☐ |