Description and Transcript – Word of the Week: Inventory.

Slide 1 – Word of the Week: Inventory.
Narrator: Our word of the week is inventory.

Slide 2 – What's a records inventory?
Slide image: Woman taking inventory in a warehouse in the 1940s.
Narrator: When most of us hear the term inventory, we might think of counting the number of items in a retail store or a warehouse, or we think of inventories that account for computer equipment or other materials.

Slide image: A records warehouse with boxes on shelves.
Narrator: In the records management world, you might create a box inventory or box list to identify all the records stored in a records center. In that case, you'd have a list of all the titles of the folders in each box, and that index would help you to find the files you need quickly and easily.

Slide image: Three people examining records in an old-fashioned file room.
Narrator: But in this case, we're talking about a records inventory. A records inventory is a high-level survey of all the different types of information being created, received, and stored by an organization. We use the information we gather in a records inventory to develop, implement, and improve our records management programs.

Slide 3 – Record Series and Systems.
Slide image: Drawings of a computer and file folders with the words Personnel Files, Contracts, Visitor Logs, and Case Files on them.
Narrator: A records inventory is focused on different types, or families, of records. We call those records series. A series is a group of records that we keep together because they come from the same business process, they relate to the same topic, or they're in some way related to one another.
For example, we might have a series of records called "procurement files" or "contracts." All the records in that series document the purchasing process. Records series like project history files, case files, and many others all document our work. As we're doing an inventory, we identify these collections of information, and that includes information kept in electronic systems, databases, data warehouses, and other information systems.

Slide 4 – An inventory tells you: Series, Systems, Formats, Locations.
Slide image: A man looks at a motion picture film canister.
Narrator: A records inventory helps you discover what kinds of records series and information systems your office is creating and maintaining
It tells you how and where those records are being stored, and in what formats

Slide 5 – An inventory tells you: Date range, Volume.
Slide image: A records storage area with rows of cabinets.
Narrator: An inventory also tells you how many years each series covers, and what volume of information you have. So, do our records cover 1988 to the present, or just the last few years? Do we have eight terabytes of electronic records, a thousand boxes, or both?

Slide 6 – Use an inventory to: Streamline, Consolidate storage.
Slide image: A man climbs a ladder in a records storage warehouse.
Narrator: Through your inventory, you might identify opportunities to consolidate storage of duplicate copies or use lower-cost off-site records centers for your paper files. You might find ways to streamline electronic records storage so your network drives are more efficient and backups take less time.

Slide 7 – Use an inventory to: Plan for better security, access, and management.
Slide image: A poster from the 1940s reads, "Lock up these papers. The Enemy is vigilant."
Narrator: Through your inventory, you may identify security concerns or steps you need to take so personally identifiable information and other sensitive records can be better protected. You might also discover best practices in one department that could help other departments better manage their records.

Slide 8 – Use an inventory to: Identify needed improvements.
Slide image: Boxes and motion picture reels stacked on the floor. Some film is spilling out of one reel.
Narrator: Through an inventory, you can identify conditions that threaten the survival of your records. An inventory can help us spot minor problems before they become big problems. If we discover records that are being stored in unsafe conditions or find records that are not being retained for the correct amount of time, we can recognize that and take steps to improve our recordkeeping practices and avoid potential loss.

Slide 9 – Use an inventory to: Create file plans, Plan new systems.
Slide image: A woman sits at a messy desk full of papers. She is holding a disc.
Narrator: Good planning depends on good information. We need to know what we have in order to make smart decisions about how to maintain and manage our records.
Once you know what information you have, you can begin to establish file plans, create a central file station in the office or online, or identify records that can be transferred into a new electronic records management system.

Slide 10 – Use an inventory to: Build and update records schedules, Identify essential records.
Narrator: Inventory information will also help you to identify records schedules that need to be updated, and an inventory would help you collect the information you need to design new schedules so records are kept for the right amount of time. Through your inventory, you can also identify vital records that need to be backed up off-site for access in emergency situations.

Slide 11 – Plan the inventory: Identify goals and scope. Get support.
Slide image: A woman and man review a printed report.
Narrator: When you begin planning your inventory, you'll want to be sure that you're clear about why you're doing the inventory. Are you creating a baseline to use as you revitalize your records management program, or updating your records schedules? Are you moving to a new building, or planning for a new e-records system?
Once you know where you're going, and why, you'll want to identify the people who can help with your efforts. That will include managers, technical, program, and administrative staff, and others who can help you locate, identify and understand the records.

Slide 12 – Plan the inventory: Decide what information to capture, and how; Plan your approach.
Slide image: Several vintage computer printers sit in front of a large computer on a platform.

Narrator: You'll need to decide what information to capture and what methods you'll use to collect the data, based on the goals and scope of your inventory. At the very least, you'll probably capture the name of each series, a brief description, its location, and other relevant data. You'll also decide how and where to look. You'll probably start with information that is actively being maintained in your office and on your network, but you'll also want to include older files that are stored off site. Depending on the size and scope of your inventory, you may visit each office yourself, or you may recruit help from others.

Slide 13 – Perform the inventory, analyze the data.
Slide image: Two men examine a notebook full of papers.
Narrator: You and your team will find and document the records series and information systems. What happens next depends largely on the goals of your inventory, but basically, once you have gathered the information, you will start by analyzing the data. If you are creating a records maintenance program or standing up an electronic records management system, you'll use the information from the inventory to begin creating file plans and filing structures. If you are creating or updating a records schedule, you will use the information to compare the records you found to existing schedules and to begin drafting new and updated records schedules for review and approval. As you're reviewing the inventory, of course, you'll also look for trends and opportunities for improvement.

Slide 14 – Know what you have, so you can decide what to do.
Slide image: Three people examine records in an old-fashioned records room.
Narrator: A records inventory really is your first step toward better records and information management. When you know what you have, and how and where it's stored, it becomes much easier to respond to requests, to plan for better storage, to locate the data we need to do our jobs, to get organized, to prepare for emergencies, and to plan for the future.

Slide 15 – For more information about the U.S. National Archives and records management, visit www.archives.gov.
Narrator: If you'd like more information about planning and conducting records inventories, visit us online at archives.gov.