

If more than one department or office is to be inventoried, create a copy of the "Dept Name" worksheet, and rename each tab for the applicable department or office. Sample entries have been provided on the second worksheet.

### Instructions

1. **Department/Office:** Identify the department or office for which the inventory is being completed and use that in the spreadsheet file name. For example, RecordsInventory\_Campus Services.xlsx.
2. **Division/Section:** Identify the division or section within the department or office whose records are being inventoried and type that (or an abbreviation of it) on a worksheet tab. For example, Facilities Management or Planning, Design, and Construction.
3. **Location:** Provide the location where the record is physically or electronically stored. For example, Room 221.
4. **Inventory Marker:** This field can be used to record a number or other identifier that helps further identify the location of the records. This may be something that is placed in or on an inventoried record, such as a box number or description of a file cabinet. This helps in locating or referencing a record post-inventory. For example, box 12 or third filing cabinet.
5. **Description:** Describe or title the records, noting what work functions the record documents or supports.
6. **Date Range:** Provide the dates of the records from the earliest to the most recent. Use approximate dates when exact dates cannot be determined. Note any gaps in the range.
7. **File Arrangement:** Indicate how the record is indexed, cataloged, or filed. For example, records may be kept in chronological or alphabetical order.
8. **Cut-off Event:** Indicate the event or trigger point that transitions the record from active to inactive such as after end of fiscal year, after closed, or after end of semester.
9. **Approx. Volume:** Provide an estimate of the volume of records. Express the approximate volume of paper records in cubic feet where possible. For a point of a reference, a records center box of 12" x 15" x 10" is one cubic foot. When inventorying audiovisual records, provide an item count (e.g., 1200 prints, 3500 negatives) where appropriate. The volume of electronic records should be recorded in a byte format (KB, MG, GB, etc.).
10. **Format (paper, film, electronic):** A particular records series may include multiple formats, such as paper (loose documents, bound volumes), electronic (word-process files, databases, spreadsheets), and audio and visual material (film, photographs).
11. **Record or Non-record:** Type a R to indicate the material was created or accumulated during the course of, and that provides evidence of, public business. Type an N if the material is used only for convenience, courtesy, or information purposes.
12. **Essential Record:** Type Y or N to indicate if this record critical to the continuation/resumption of University business following an unplanned interruption, such as a power outage or a severe, regional weather event.
13. **Records Series Title or Type:** Using the University Retention Schedules, identify the appropriate series. Indicate "N/S" if the record cannot be classified into an existing series, and contact the Records Management Analyst to begin a schedule update. This phase of the inventory is best undertaken after the survey has been completed, so the records stored in various locations can be grouped together on the spreadsheet.

14. These last three can be recorded in the spreadsheet metadata, under File, Properties, then Summary.
  - a. **Inventoried By:** Enter the name of the person who completed the survey form in the Author field.
  - b. **Telephone Number and Extension:** Enter the telephone number and extension of the person who completed the survey form in the Company field.
  - c. **Inventory Date:** Enter the date the survey form was conducted in the Comments field.