



1. Tools and Resources Checklist

What is the purpose? Have the necessary tools, resources, and training to get started.

Why should you create one? The clean-up requires a basic understanding of records management principles and processes, as well as some tools and resources to help you make decisions about your records.

- [Retention Schedule](#)**
 - Obtain and review your Agency-Specific Retention Schedule, OR
 - If you do not have an agency specific retention schedule, use the General Retention Schedule.
 - If you are not familiar with all the records on your Share Drive, identify point persons in your office that can help you inventory the records.

- Project Plan (optional):**
 - If you are working with a large shared drive that involves more than one group, a project plan may be helpful

- Staff Resources:**
 - A liaison for each work unit; a point person to help answer questions about records on your drive that you are not familiar with.

- Training:**
 - A foundational understanding of records management is a good start. Our [Basic Records Management training](#) provides this and may help guide decision making through the clean-up process. (Class is 15 minutes in length)
 - [Content Manager training](#) is recommended for all staff (different options available)

- Disposition Forms**
 - [Disposition Request Forms](#) are required to disposition records with retention value that have passed retention and are not stored in Content Manager.

- File directory scan software (optional):**
 - On your computer, at the start button, conduct a search for Software Center. Within Software Center, locate and download “TreeSize Free” or “gFileList Ultra” which are both tools that can be used to scan your file directories.
 - This software will scan and produce a list of your file folders to export.

