2. Create a File Inventory

What is a file inventory? Create an inventory list of the file folder system you are cleaning. This should identify top level files and may also include sub folders. The spreadsheet should organize information about the folder contents and identify retention requirements of the records.

Why is this created? This will inform what stage of the records lifecycle the records are in in order to disposition, file, or reorganize them.

1. Create a spreadsheet that lists of all the parent folders on the drive. This can be done manually, or using the "TreeSize Free" or "gFileList Ultra" software. (Column A below)

2. Describe the contents of each folder. Include what they are and 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)

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

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

5. Based upon the record series retention and the inclusive years of your records, identify which are eligible for disposition. (Column E)

6. Identify if any of the folder contents are inactive or have passed retention, and if they archival or potentially archival value. (Column D)

7. Communicate with the appropriate staff for additional input or review.

8. Based upon information for each folder, note which action needs to be taken in the last column. (Column F)

King County Records Management Program
Phone: 206-477-6889
Email: records.management@kingcounty.gov
Web: www.kingcounty.gov/recordsmanagement
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Below is an example of what a file inventory spreadsheet might look like:

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) destro records passed retention