

Organizing and Inventorying: What Should Agencies Include in a Records/Data Inventory?

Purpose: Provide guidance to state and local government agencies on what records and data should be inventoried.

What Records Should Be Inventoried?

All records, data, and other recorded information at the agency should be inventoried. Your records inventory should include:



- ✓ Paper records
- ✓ Electronic records and data
- ✓ Audio or video
- ✓ On-premise or in the cloud
- ✓ Archival and Non-Archival records
- ✓ Essential and Non-Essential records

How Detailed Should the Inventory Be?

Your records inventory should be only as detailed as you need it to be in order to know what you have and where it is. We recommend including the following details in your records inventory:

- ☐ Location of the records;
- ☐ Brief description of the records;
- ☐ Date the records were created;
- ☐ Number of boxes;
- ☐ Number of gigabytes or terabytes;
- ☐ Disposition Authority Number;
- ☐ Archival designation;
- ☐ Essential designation;
- ☐ Required retention period and date the records will be eligible for destruction or transfer to Washington State Archives;
- ☐ Existence of any confidential or disclosure exempt information;
- ☐ Whether the records should be destroyed or transferred to Washington State Archives once they've met their minimum retention period.



**Additional advice regarding the management of public records is available from
Washington State Archives:**

**www.sos.wa.gov/archives
recordsmanagement@sos.wa.gov**