

Identify specific metadata to manage an electronic record through its lifecycle

Instructions for Using This Job Aid

Use this job aid when you are assigned to identify what specific metadata is needed to manage an electronic record through its lifecycle. Check off each step when you have completed the step.

Procedure	Actions/Decisions	
1. Identify records series within the organization containing electronic (e) records.	1. Perform a business analysis within the applicable organizational unit(s).	<input type="checkbox"/>
	2. Examine business process workflow(s) resulting from the analysis for potential e-records creation or receipt.	<input type="checkbox"/>
	3. Review existing file plans for additional record/records series	<input type="checkbox"/>
	4. From information collected in Steps 1.1-1.3 create a list of record creators by organizational group/unit.	<input type="checkbox"/>
2. Within each identified records series, determine how component information objects (text documents, e-mail, images, databases, digital photographs, etc.) are going to be described, organized (alphabetically, numerically,	1. Using list from step 1.4, interview subject matter experts (SMEs), records creators, and end users in each organizational group/unit. Collect and record data on: <ul style="list-style-type: none"> • What records are created? • What terms are used and their frequency? • How each user views how potential metadata will be used to describe each object (record or series of records) and preserve it over time. • How records will be searched, accessed, and retrieved over their life cycle 	<input type="checkbox"/>

Procedure	Actions/Decisions	
chronologically, by subject, etc.), searched and used.		
	2. Search the records in each organizational group/unit (independent of the office staff) for additional key/repetitive terms, office codes, etc. not already collected from user interviews.	<input type="checkbox"/>
	3. Record the data found in Step 2.2	<input type="checkbox"/>
3. Record and analyze collected data.	1. Create a list of all collected data in Subtask 2.	<input type="checkbox"/>
	2. Match terms with related records/records series	<input type="checkbox"/>