



A GUIDE TO CONDUCTING A BASIC INVENTORY

Documentary Heritage and Preservation Services for New York

WHAT IS AN ARCHIVAL INVENTORY?

A formal list of the property in a repository, ideally connecting a physical object to a location, and to a number in the catalog or other formal record.



BASIC Inventory:

- ☐ Overview of entire collection holdings
- ☐ Manage in groups, not individually
- ☐ Record box- or drawer-level information
- ☐ Use as an internal tool



DETAILED Inventory:

- ☐ Review materials within each collection
- ☐ List contents at series- or folder-level
- ☐ Create descriptive records for discovery
- ☐ Often shared through public finding aids



WHY WOULD YOU WANT TO CONDUCT ONE?

Intellectual Control

- Improve stewardship by knowing what you have and where to find it.
- Increase efficiency by making collections easier to locate and manage.
- Clarify collection scope to guide priorities and promote transparency.



Accountability

- Improve security, insurance documentation, and set emergency salvage priorities.



Budgeting Resources

- Clarify resource needs for staffing, supplies, and funding.
- Support planning for processing, storage, and conservation projects.





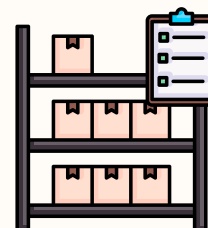
A GUIDE TO CONDUCTING A BASIC INVENTORY

Documentary Heritage and Preservation Services for New York

HOW DO YOU APPROACH THIS TYPE OF PROJECT?

1. Make a Plan

- **Set** clear goals and scope for the project.
- **Define** what information you want to capture.
- **Choose** tools and agree on shared workflows.
- **Document** decisions and follow a consistent process.
- **Plan** storage locations and regular file backups.



2. Use What You Already Have

Review any existing inventories, catalogs, accession records, or other documentation related to your collections. Compare these records to the collections themselves first, rather than creating a new list and reconciling it afterward. This approach saves time and ensures consistency.



3. Decide What information to Record

The data fields you capture will be dependent on the type of material, collection structure, and institutional goals.

- | | | |
|--------------------------------------|-------------------------------|--|
| • Collection title and creator/donor | • Location information | • Key missing information about the collection |
| • Identifying numbers | • General dimensions | • Dates of inventory work |
| • Material type or format | • Condition notes or concerns | • Staff conducting the inventory |
| • Quantity | • Rehousing or storage needs | |

Plan for Next Steps



- **Back up** all digital copies in secure, off-site or cloud storage
- **Establish** a schedule for regular or spot inventories
- **Update** the inventory whenever items are moved or re-housed
- **Resolve** any “found in collection” materials through accessioning or disposal

Additional Resources

- DHPSNY webinar: [Conducting a Basic Inventory](#).
- DHPSNY webinar: [Know Your Collections: Collections Management](#).
- Maureen McCormick, [A Place for Everything and Everything in Its Place: Conducting \(and Maintaining!\) a Collection Inventory](#). October 4, 2016. FAIC Webinar: Connecting to Collections Care.
- Suzanne Etherington and Ann Marie Przybyla. [Inventory and Planning: The First Steps in Records Management](#). (Publication Number 76.) The University of the State of New York; The State Education Department; New York State Archives; Government Records Services. 2003.