RESOURCE 03 - PRACTICAL GUIDE

Your data and documents: take an initial inventory.

A simple register to locate useful sources, identify the right people and prepare checks.

Start with a practical use.

Choose an activity, then identify the information needed to explain it: requests, trackers, prices, instructions or documents produced. A source can be software, a file, an inbox or a paper record.

Five questions for each source

What, and for what purpose?	Name the source and its purpose in the chosen activity.
Where, and in what form?	Identify the location, format and reference version, if known.
Who knows it?	Identify who can explain its contents and who authorises access.
Which access rights and limits?	Specify who reads or edits it and whether it holds sensitive information.
What remains to be checked?	Identify duplicates, missing information, updates and unclear rules.

01

Identify

List a few sources directly related to the activity.

02

Describe

Record the purpose, location, contact person and known limits.

03

Check

Choose a representative example and the next useful action.

Describe sources without copying their contents. A folder name or category is enough. Do not record passwords or access keys; agree consultation conditions with the person responsible.

What about AI? This inventory helps identify what needs examination: reliable information, current references, access rights and checks. Whether an AI use case is appropriate still needs study in its context.

RESOURCE 03 - FILLABLE REGISTER

Your initial inventory.

List the sources for one activity. Identify what is known and what needs confirmation.

Activity / scope

E.g. from the customer request to the quotation being sent.

Contact person / date updated

Role or first name, then date.

D : source located - **R** : identified source to gather - **C** : availability to confirm.
The status describes availability, not quality. Record checks on contents, versions and access separately.

Status / source	Purpose / location	Contact person / access	Points to check / next action

Reference source to confirm

If two sources conflict, which is the reference?

An example you could use for the audit

Describe an example, who holds it and the access conditions.

> Use one row per useful source. In “Points to check”, consider **duplicates**, the **last update date**, **missing information** and **sensitive data**. For another source, use “Notes and continuation” or duplicate this worksheet.

RESOURCE 03 - COMPLETED EXAMPLE

Sources identified. Specific questions.

Three sources are enough here to identify the first checks. The statuses describe availability; checks are recorded separately.

FICTIONAL TEACHING EXAMPLE - MAINTENANCE SME

Status / source	Purpose / location	Contact person / access	Points to check / action
D - Shared inbox Messages and attachments.	Receive and clarify customer requests. History in the inbox.	Administrator; request-handling team. Contains customer contact details.	Some requests may have no status. Examine a few cases and the filing rules.
D - quotes.xlsx Tracking spreadsheet.	Track requests and quotations in the shared folder.	Administrator and manager; editing rights to confirm.	Several copies are reported. Identify the reference version and check available dates.
R - Service catalogue PDF document.	Prepare cost estimates using services and prices.	Manager; read access for those who prepare quotations.	The update date needs checking. Find the approved version and the update rule.

What this inventory highlights

A starting point

Requests, tracking and prices are identified. The people who use them can be involved.

A priority check

Clarify reference versions and update rules before connecting the sources.

A basis for examining AI uses

An inventory is not enough to conclude that an AI agent is suitable. It helps frame questions: which sources to use, with which rights, for which task and under what human oversight?

Would you like to explore your situation? Let's talk at your pace.
contact@tinor.fr · **tinor.fr**

RESOURCE 03 - CONTINUATION SHEET

Notes and continuation.

For a detailed answer, write “see continuation” in the worksheet and identify the relevant section here. You can also continue a process or add another source.

Continuation 1 - relevant section, stage or source

Details to keep

Continuation 2 - relevant section, stage or source

Details to keep

Continuation 3 - relevant section, stage or source

Details to keep

Describe useful information without copying sensitive data, passwords or access keys. Duplicate this page if needed.