

Start with the question

Use this page before deciding whether records need to move into a new system.

Type in the fields or print. Save your copy. No answers are sent to Redbroch.

Use non-sensitive descriptions. Do not enter client records or credentials.

01 What question do you want the system to answer?

Example: Where is the prior-year memo? Use fictional names, not client details.

02 Where would the answer come from?

Name the systems and the access needed. Mark any connection you have not verified.

03 What would need to move or be copied?

Compare live retrieval, an export and a shared store. Include logs and temporary copies.

04 What is the smallest useful test?

Name one question, one source and what a reviewer would check to judge the result.

Discussion aid only. Not tax, legal or security advice.

Companion article: redbroch.com/centralising-your-data.html