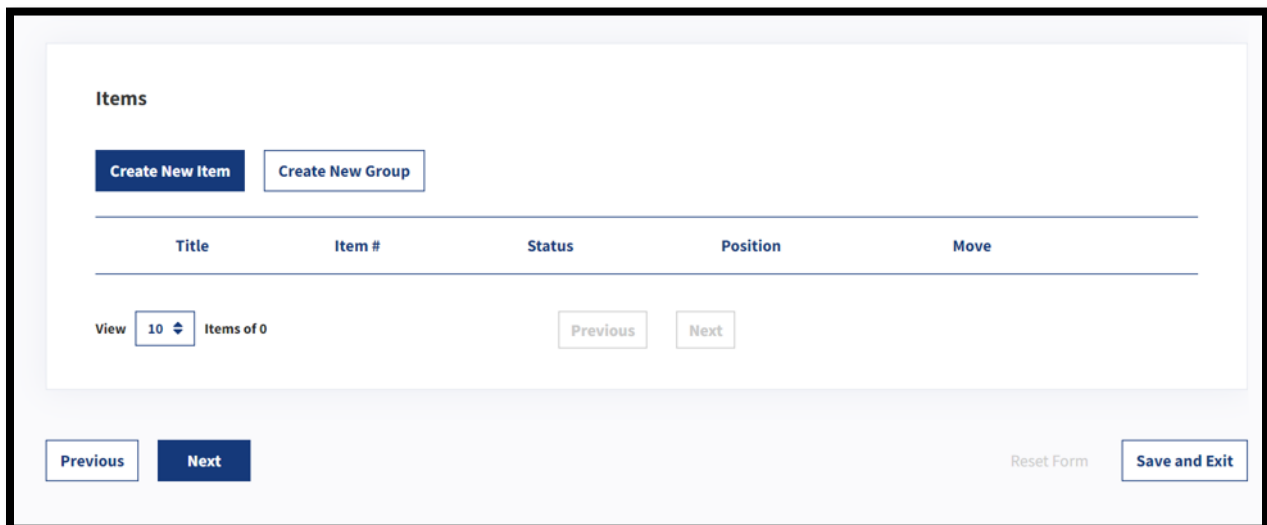


## Just-in-Time Instructions for: Create and Edit Items

The Items tab facilitates the creation and management of **Items** and/or “**Groups**” of items (formerly known as “Overview” in ERA). You may use the Items tab to enter data for multiple Items or Groups. Upon landing on the page, you will be presented with the following options:

- **Create New Item** - allows the user to create an Item.
- **Create New Group** - allows the user to create a new Group.



The screenshot displays the 'Items' tab interface. At the top left, there are two buttons: 'Create New Item' (dark blue) and 'Create New Group' (light blue). Below these is a table with the following headers: 'Title', 'Item #', 'Status', 'Position', and 'Move'. Under the table, there is a 'View' dropdown menu set to '10' and the text 'Items of 0'. To the right of the view controls are 'Previous' and 'Next' buttons. At the bottom of the interface, there are 'Previous' and 'Next' buttons on the left, a 'Reset Form' link in the center, and a 'Save and Exit' button on the right.

Figure 1: Items Tab

## Create and Edit Item – Item General Information

1. Select **Create New Item**. The Item General Information tab displays.
2. Enter the item's **title and description** in the corresponding fields.
3. Reply **Yes** or **No** to: *Is this item media neutral?* If you select **No**, select the appropriate value from the *Media Limitations* drop-down menu that displays. Options are:
  - Paper/analog only
  - Digital only
4. Reply **Yes** or **No** to: *Is this item a Big Bucket?*
5. Select **Next**. The Manual Citation tab displays.



If an Item is media neutral it applies to the records regardless of their media (paper, electronic, etc.). A media specific item applies to records only in a specified medium. If the item is not media neutral, the user will be prompted to select the specific media that applies to the records.



If an Item covers multiple series of records that relate to the same subject matter, business function, or work process, it may be considered a “Big Bucket.” These Items provide disposition authority for all existing series covered by the Item, and for any additional series created in the future that conform to the bucket’s description.

## Create and Edit Item – Manual Citation

Use the Manual Citation tab to enter the manual citation, or another code or classification, used by the agency to identify specific Items.

1. Enter an **agency-assigned identifier** to the item (i.e., either a manual citation, code, or classification) in the *Agency Code* text-entry field. *Note: This field is limited to 100 characters.*
2. Enter the **title of the agency's records disposition manual** in the *Manual Title* field, if a manual citation is provided in the prior field.
3. Select **Next**. The Superseded Agency Disposition Authorities and GRS Deviations Tab displays.

## Create and Edit Item – Superseded Agency Disposition Authorities and GRS Deviations

Use this tab to supersede existing disposition authorities and indicate that the newly created Item deviates from an existing GRS disposition authority.

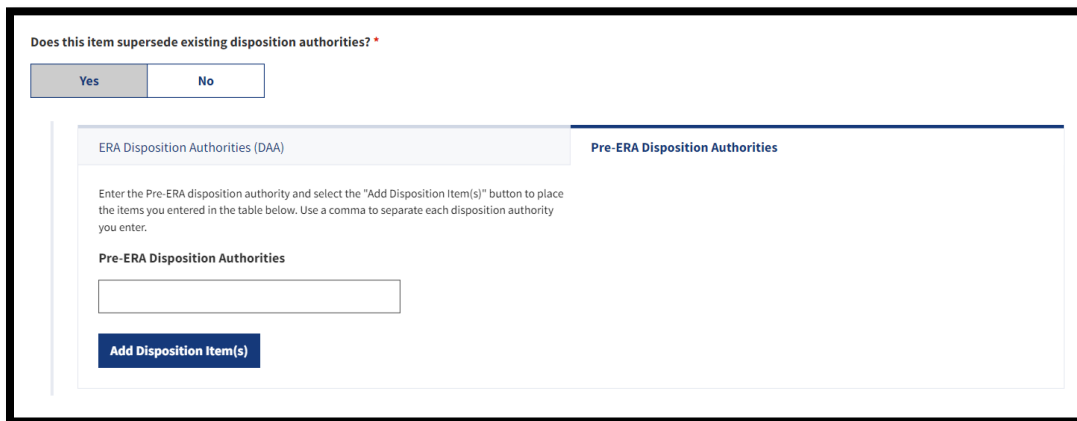
1. Reply **Yes** or **No** to: *Does this item supersede existing disposition authorities?* If you select **Yes**, a dialog window displays the containing two tabs as follows:
  - a. **ERA Disposition Authorities:** This tab is used to select and add disposition authorities that were previously approved on a records schedule. *If created in ERA, the disposition authority has a DAA prefix.* To add active Items that will be superseded (i.e., replaced), select **Find DAA Item(s)**. A pop-up that is pre-populated with all active Items will appear. Select the **checkbox** next to the **Item(s)** that will be **superseded**. Once selected, select **Add Disposition Item(s)**.



The screenshot shows a dialog window titled "Does this item supersede existing disposition authorities? \*". At the top, there are two buttons: "Yes" (highlighted) and "No". Below this, there are two tabs: "ERA Disposition Authorities (DAA)" (active) and "Pre-ERA Disposition Authorities". The active tab contains the following text: "Select the 'Find DAA Item(s)' button below to find existing disposition authorities. After selecting one or more items available, select the 'Add Disposition Item(s)' button to place the Item(s) in a table below." Below the text is a blue button labeled "Find DAA Item(s)".

Figure 2: ERA Disposition Authorities Tab

- b. **Pre-ERA Disposition Authorities** (Also known as “Legacy Schedules”): This tab is used to manually enter disposition authorities that pre-date ERA (a disposition authority with a prefix such as N1, NC, NC1, or NN); also referred to as “Legacy Schedules.” For guidance on formatting Pre-ERA Disposition Authorities, review the [Key for SF 115 and Records Schedule Numbering](#) resource available on [Archives.gov](#).



Does this item supersede existing disposition authorities? \*

Yes  No

ERA Disposition Authorities (DAA) | Pre-ERA Disposition Authorities

Enter the Pre-ERA disposition authority and select the "Add Disposition Item(s)" button to place the items you entered in the table below. Use a comma to separate each disposition authority you enter.

Pre-ERA Disposition Authorities

Figure 3: Pre-ERA Disposition Authorities Tab

- c. Once the item(s) are added, you will see following sub-field:
- Item Superseded In Part?** This sub-field is used to indicate whether an Item will be fully superseded or partially superseded. You can select **Yes** or **No**. If you select **Yes**, you will be required to provide an explanation in the available text-entry field. *The character limit for this field is 500.*



Once the schedule is approved by the Archivist of the United States, the Item that was superseded will become

“Inactive.” If all the Items in the schedule become Inactive, then the status of the whole records schedule will be updated to “Inactive.”

2. Reply **Yes** or **No** to: *Is this item a deviation from the GRS?*  
This field is used to indicate whether the records described by the Item are covered by the GRS in whole or part. If you select **Yes**, the **GRS disposition Authority** sub-field displays.



Is this item a deviation from the GRS? \*

Yes  No

GRS disposition authority \*

**Lookup GRS Item ID(s)**

No GRS have been added.

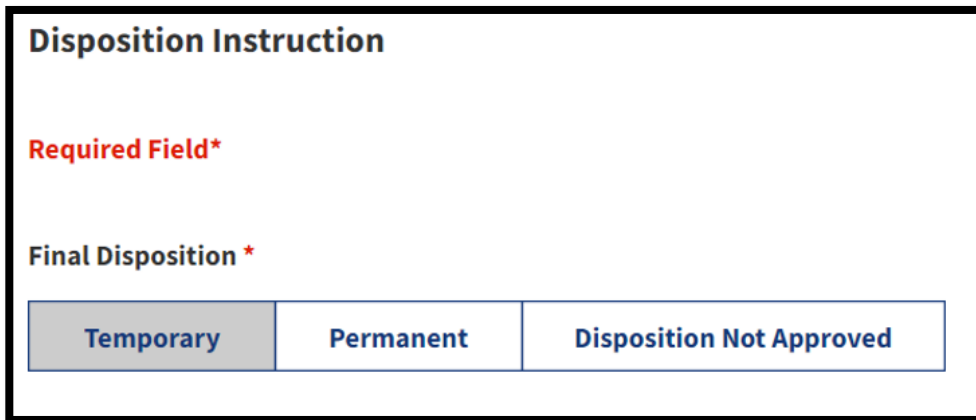
Figure 4: GRS Disposition Authority Fields

3. Follow the prompts to select and add existing GRS disposition authorities that apply to records described in this Item. To add an Item, select **Lookup GRS Item ID(s)** and select **Add Disposition Item(s)**. The **Justification for GRS Deviation** field displays.
4. Enter the **justification** for requesting the use of an agency Item rather than the GRS for records covered by the GRS in the **Justification for GRS Deviation**. *The character limit for this field is 500.*
5. Select **Next**. The Disposition Instruction tab displays.




## Create and Edit Item – Add Disposition Instructions

Use the Disposition Instruction tab to enter disposition instructions for the Item – i.e., whether it is **Permanent**, **Temporary**, or **Disposition Not Approved**, as well as the retention period for the records.



The screenshot shows a form titled "Disposition Instruction". Below the title, there is a red "Required Field\*" label. Underneath, the text "Final Disposition \*" is displayed. Below this text is a horizontal row of three buttons: "Temporary", "Permanent", and "Disposition Not Approved". The "Temporary" button is highlighted with a grey background, indicating it is the selected option.

Figure 5: Disposition Instructions Tab

 ERA 2.0 sets the Item as *Temporary* by default. If you need to change the disposition, select the appropriate disposition under the *Final Disposition* header. Additional sub-fields display based on your selection. The following instructions provide guidance for completing the relevant sub-fields by disposition type.

### Add Temporary Disposition Instructions

1. Select **Temporary** under the *Final Disposition* header.



This is a close-up of the "Final Disposition \*" header area from the previous figure. It shows the three buttons: "Temporary", "Permanent", and "Disposition Not Approved". The "Temporary" button is selected and highlighted with a grey background.

Figure 6: Final Disposition Header – Temporary Disposition Selected

2. Select a **cutoff instruction** from the available options



listed under the *Cutoff Instructions* header; some options may require that you enter an additional value and/or select a value from a drop-down menu.

The screenshot shows a form titled "Disposition Instruction". At the top, it says "Required Field\*". Below that is "Final Disposition \*" with three buttons: "Temporary" (selected), "Permanent", and "Disposition Not Approved". Underneath is the "Cutoff Instructions" section with several radio button options: "There is no cutoff instruction", "Cut off when [text box]", "Cut off after [text box]", "Cut off at end of [text box] year.", "Cut off at end of [text box] year when [text box]", "Cut off at end of [text box] year after [text box]", "See cutoff instructions in crosswalk", and "Other: [text box]".

Figure 7: Temporary Disposition Sub-Menu – Cutoff Instructions

3. Select a **retention period** from the available options listed under the *Retention Period* header; some options may require that you enter an additional value and/or select a value from a drop-down menu.

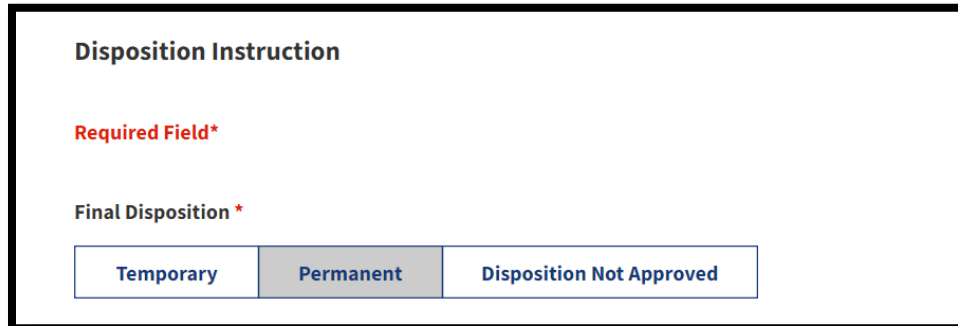
The screenshot shows a form titled "Retention Period \*". It contains several radio button options for destruction: "Destroy immediately after [text box]", "Destroy [text box] year(s) after [text box]", "Destroy [text box] year(s) and [text box] month(s) after [text box]", "Destroy when no longer needed", "Destroy between [text box] year(s) and [text box] year(s) after [text box]", "Destroy no later than [text box] year(s) after [text box]", "Destroy [text box] year(s) after [text box] or when [text box] occurs, whichever is [text box]", "Destroy [text box] year(s) after [text box] or [text box] year(s) after [text box] occurs, whichever is [text box]", and "Other: [text box]".

Figure 8: Temporary Disposition Sub-Menu - Retention Period Instructions

4. Select **Next**. The Additional Information tab displays.

### **Add Permanent Disposition Instructions**

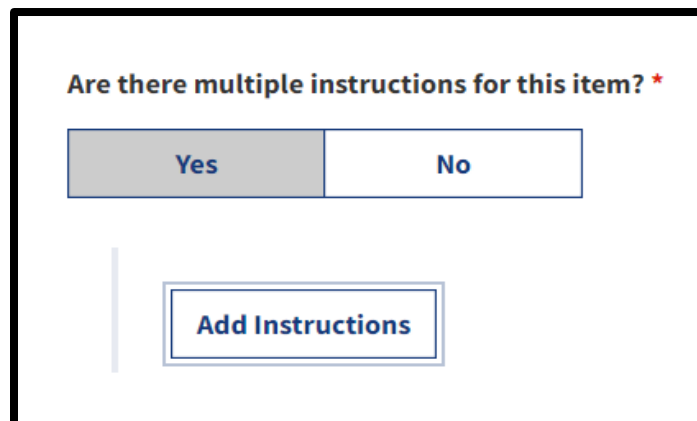
1. Select **Permanent** under the *Final Disposition* header.



The screenshot shows a form titled "Disposition Instruction". Below the title, there is a red label "Required Field\*". Underneath, the text "Final Disposition \*" is displayed. Below this text is a horizontal row of three buttons: "Temporary", "Permanent", and "Disposition Not Approved". The "Permanent" button is highlighted with a grey background, indicating it is the selected option.

Figure 9: Final Disposition Header - Permanent Disposition Selected

2. Select a **cutoff instruction** from the available options listed under the *Cutoff Instructions* header; some options may require that you enter an additional value and/or select a value from a drop-down menu.
3. Reply **Yes** or **No** to: *Are there multiple instructions for this item?*
  - a. If you answered **Yes**, the **Add Instructions** menu displays.



The screenshot shows a form titled "Are there multiple instructions for this item? \*". Below the title is a horizontal row of two buttons: "Yes" and "No". The "Yes" button is highlighted with a grey background, indicating it is the selected option. Below the buttons is a vertical line, and to the right of the line is a button labeled "Add Instructions".

Figure 10: Multiple Instructions Field - Add Instructions Sub-Field

- i. Select **Add Instructions** and then follow the prompts on the sub-menu to identify the **record formats the instructions apply to** and select the specific instructions to be applied.

**Required Field\***

**Records to which this instruction applies \***

- Select -

**Pre-Accessioning Instruction \***

Records will not be pre-acquisitioned

Transfer electronic records to the National Archives for pre-acquisition immediately after

Transfer electronic records to the National Archives for pre-acquisition  year(s) after

**Transfer Instruction \***

Transfer to the National Archives immediately after

Transfer to the National Archives  year(s) after

Transfer to the National Archives  year(s) and  month(s) after

**Add** **Cancel**

*Figure 11: Add (Multiple) Instructions Menu*

- ii. Select **Add** to add the instructions to your Item.
- iii. Repeat until each of the relevant instructions pertaining to the Item are added. All instructions will display under an expanded *Add Instructions* sub-field.

- b. If you answered **No**, only the instructions menu will display.

Are there multiple instructions for this item? \*

**Pre-Accessioning Instruction**

Records will not be pre-accessioned

Transfer electronic records to the National Archives for pre-accessioning immediately after

Transfer electronic records to the National Archives for pre-accessioning  year(s) after

**Transfer Instruction \***

Transfer to the National Archives immediately after

Transfer to the National Archives  year(s) after

Transfer to the National Archives  year(s) and  month(s) after

Transfer to the National Archives between  year(s) and  year(s) after

Transfer to the National Archives in  year blocks  year(s) after


Other:

Figure 12: Add Instructions Menu

- i. Select and enter details for the specific
4. Select Next. The Additional Information tab displays.

### ***Add Disposition Not Approved Instructions***

1. Select **Disposition Not Approved** under the Final Disposition header.



The screenshot shows a form titled "Disposition Instruction". Below the title, there is a red label "Required Field\*". Underneath, the text "Final Disposition \*" is displayed above a dropdown menu. The dropdown menu has three options: "Temporary", "Permanent", and "Disposition Not Approved". The "Disposition Not Approved" option is highlighted in a grey color, indicating it is the selected choice.

*Figure 13: Final Disposition Header - Disposition Not Approved Selected*

No additional sub-fields/menus display for this selection.

2. Select **Next**. The Additional Information tab displays.

 Use **Disposition Not Approved** to indicate that records have been identified but remain unscheduled. These records may not be destroyed.

## Create and Edit Item – Add Additional Information

Use the Add Additional Information tab to enter any additional information you believe may be relevant and helpful for the specific Item. Field options will vary based on your previous input (i.e., whether you chose **Permanent**, **Temporary**, or **Disposition Not Approved** in the previous tab).

### **Add Additional Information – Permanent Dispositions**

1. Enter the **legal citation** for the records retention in the *Legal citation related to record retention field* (if applicable).
2. Select the **current format of the records** from the available options in the *Current Records Format* drop-down menu.
3. Enter the **current volume of the records** in the *Current Volume* text-entry field.



Figure 14: Current Records Format Field

4. Select **Add**. The *Current Records Format* and *Current Volume* fields display your entries.
5. Repeat steps 2 to 4 for all the relevant formats.
6. Enter the **approximate first year of records covered by this authority**, if known, in the corresponding field. *This field is optional.*
7. Enter the **end year of records covered by this authority** in the corresponding field. *This field is optional.*

8. Enter the **date span of the initial transfer** in the *From* and *To* text-entry sub-fields. *This field is optional.* However, if you enter data in this field, the system validates on the *Year* sub-fields. You may leave the *Month* and *Day* sub-fields blank but **the *Year* sub-field must have an entry that conforms to the standard year format (e.g., YYYY).**

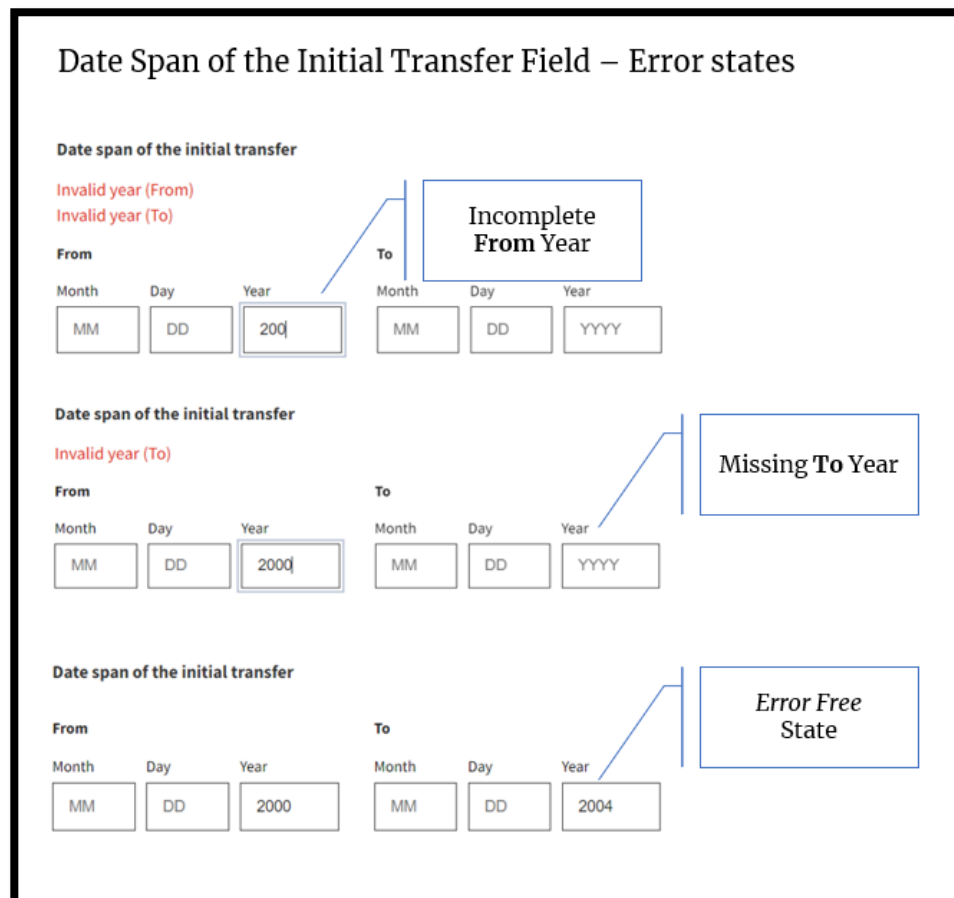


Figure 15: Date Span of the Initial Transfer Field - Error States

9. Enter the **frequency of transfer** in the corresponding field to indicate how often the records will be transferred. *This field is optional. This is generally based on how often records are cut off. If it is a one-time transfer, enter “0.” If records are cut off annually, the frequency is “1.” If they are cut off in 5-year blocks, the frequency is “5.” The frequency is usually going to be “1” unless records are being transferred in blocks, which would be indicated in a cutoff instruction.*
10. Reply **Yes** or **No** to: Are any of the records covered by this item subject to a FOIA exemption? This field indicates whether records covered in this Item are exempt from FOIA requests.
  - a. If you answered **Yes**, the *FOIA Exemption(s)* sub-field displays.
    - i. Select all the **FOIA exemptions** that apply to the records at the time of scheduling from *FOIA Exemption(s)* drop-down menu.

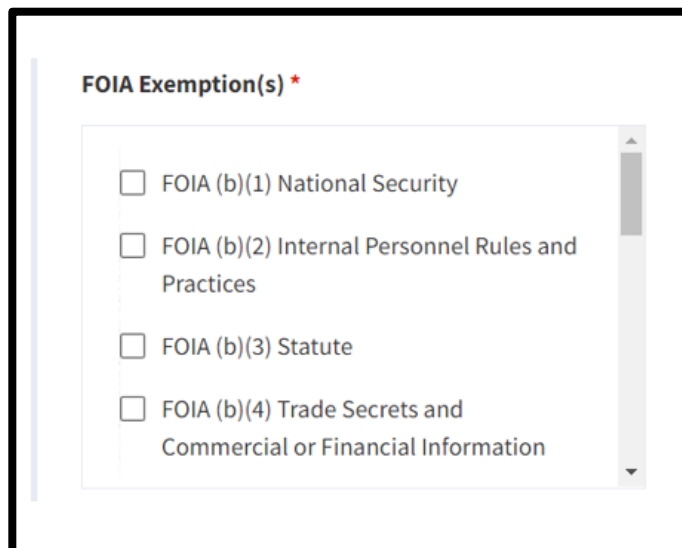


Figure 16: Section of the FOIA Exemption(s) Menu



- ii. Enter the **related statute** in reply to: *What is the related statute for the FOIA B(3) exemption?* This sub-field will only display if you select **FOIA B(3)**.

b. If you answered **No**, go to step 11.

11. Select **Next**. The Preview & Submit tab displays.

***Add Additional Information – Temporary Dispositions***

1. Enter the **legal citation** for the records retention in the *Legal citation related to record retention field* (if applicable).
2. Reply **Yes** or **No** to: *Are any of the records covered by this item national security classified?*
3. Identify whether GAO approval is required by selecting an available option from the *GAO Approval Required* drop-down menu.
4. Select **Next**. The Preview & Submit tab displays.

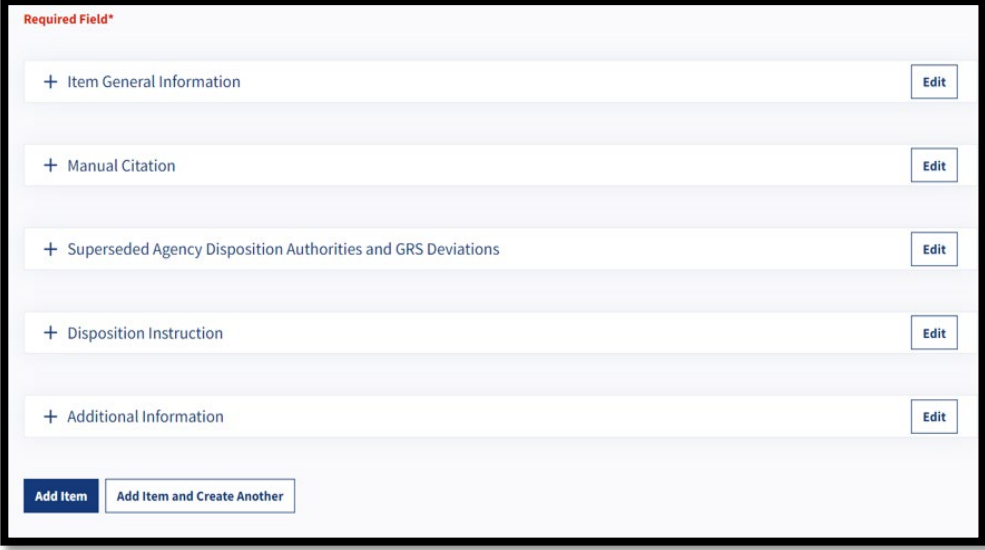
***Add Additional Information –Disposition Not Approved***

1. Enter the **legal citation** for the records retention in the *Legal citation related to record retention field* (if applicable).
2. Select **Next**. The Preview & Submit tab displays.

## Create and Edit Item – Preview & Submit

The Preview & Submit tab aggregates all the information you provided for your Item across multiple tabs and displays them on one page. You can use this overview to review/check your entries, make edits as appropriate, and/or add the Item to the records schedule. You can also start creating another Item from this tab.

1. Review the information displayed on Preview & Submit tab. Each tab from the *Items* navigation menu is represented.



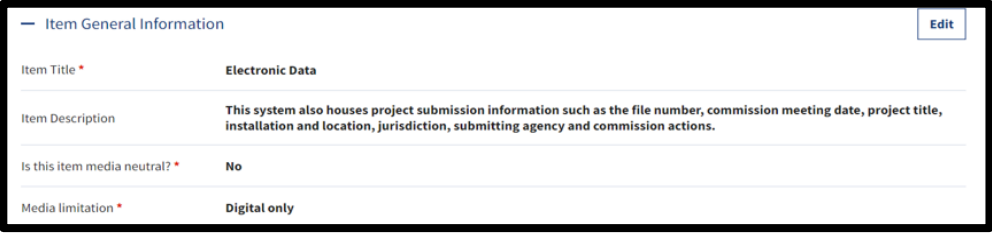
Required Field\*

- + Item General Information Edit
- + Manual Citation Edit
- + Superseded Agency Disposition Authorities and GRS Deviations Edit
- + Disposition Instruction Edit
- + Additional Information Edit

Add Item Add Item and Create Another

Figure 17: Preview & Submit Tab (Collapsed View)

2. Select the **minus (-)** symbol to collapse any section.
3. Select the **plus (+)** symbol to expand any section.



- Item General Information Edit

Item Title \* **Electronic Data**

Item Description **This system also houses project submission information such as the file number, commission meeting date, project title, installation and location, jurisdiction, submitting agency and commission actions.**

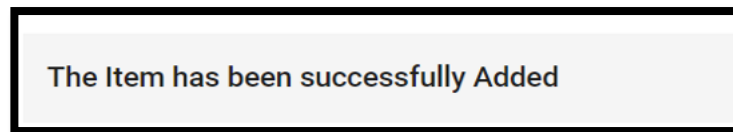
Is this item media neutral? \* **No**

Media limitation \* **Digital only**


Figure 18: Preview & Submit Tab: Item General Information Section Expanded



4. Select **Edit** located to the right of any section header to access and edit information on the corresponding tab.
  - a. Enter your **edits**.
  - b. Select **Save Changes**. The Preview & Submit tab displays.
5. Select **Add Item** to add your item to the Records Schedule and to return to the Items tab displays OR Select **Add Item and Create Another** to access the Item General Information tab and add the details for your next item (*if you are adding more than one item to the Records Schedule*).
6. Verify that the item was successfully added. The following confirmation message should display:

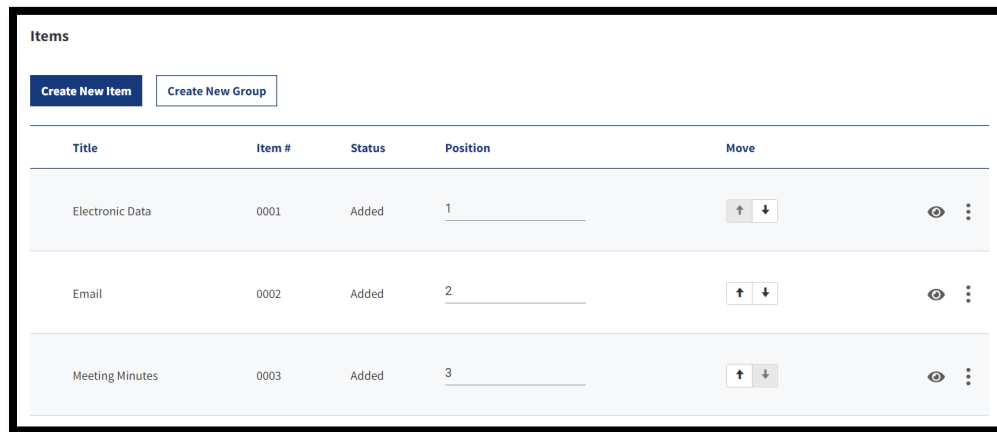


*Figure 19: Add Item Confirmation Message*

7. Repeat Step 5 until all items have been added to the Records Schedule.
  8. Select **Records Schedule Items** to return to the Items tab.
-  Once the General Information and Contact Information tabs are complete and all the associated items are entered on the records schedule, you can submit the records schedule for certification.

## Create and Edit Item – Reposition Items

By default, newly created Items will display at the bottom of the *Items* table.



Title	Item #	Status	Position	Move
Electronic Data	0001	Added	1	↑ ↓
Email	0002	Added	2	↑ ↓
Meeting Minutes	0003	Added	3	↑ ↓

Figure 20: Items Table

If the default display results in the need to reposition your items, you have 2 options: 1) change their position number manually, or 2) **move them up or down using the positioning arrows.**

1. To change the position number manually, enter the **position number** directly into the editable *Position* field. The table will update upon refresh.



Electronic Data	0001	Added	1	↑ ↓
Email	0002	Added	<input type="text" value="1"/>	↑ ↓
Meeting Minutes	0003	Added	3	↑ ↓

Figure 21: Position Field Edit on Items Tab

2. To move items up or down using the positioning arrows, select either the **Up** or **Down** arrow as appropriate. The table will update upon refresh.

Title	Item #	Status	Position	Move
Electronic Data	0001	Added	1	↑ ↓
Email	0002	Added	2	↑ ↓
Meeting Minutes	0003	Added	3	↑ ↓

Figure 22: Move Function on Items Tab

In the example below, the Item titled “Email” is moved from the 2nd to the 1st position after the user selects the **Up** arrow.

Title	Item #	Status	Position	Move
Email	0002	Added	1	↑ ↓
Electronic Data	0001	Added	2	↑ ↓
Meeting Minutes	0003	Added	3	↑ ↓

Figure 23: Reordered Items Tab Example

 The Item # will be regenerated to match its position when the Records Schedule is either Submitted for Certification or Certified.

**END.**