

**REQUEST FOR RECORDS DISPOSITION AUTHORITY**  
 (See Instructions on reverse)

TO NATIONAL ARCHIVES and RECORDS ADMINISTRATION (NIR)  
 WASHINGTON, DC 20408

1 FROM (Agency or establishment)  
**EXECUTIVE OFFICE OF THE PRESIDENT**

2 MAJOR SUBDIVISION  
**OFFICE OF ADMINISTRATION**

3 MINOR SUBDIVISION  
**RECORDS MANAGEMENT DIVISION**

4 NAME OF PERSON WITH WHOM TO CONFER  
**Markus Most**

5 TELEPHONE  
**(202) 395-6471**

'LEAVE BLANK (NARA use only)'

JOB NUMBER  
**NI-51-04-1**

DATE RECEIVED  
**1/2/04**

NOTIFICATION TO AGENCY

In accordance with the provisions of 44 U.S.C. 3303a the disposition request, including amendments, is approved except for items that may be marked disposition not approved" or "withdrawn" in column 10

DATE  
**9-16-04**

ARCHIVIST OF THE UNITED STATES  
*[Signature]*

6 AGENCY CERTIFICATION

I hereby certify that I am authorized to act for this agency in matters pertaining to the disposition of its records and that the records proposed on the attached \_\_\_\_\_ page(s) are not now needed for the business of this agency or will not be needed after the retention periods specified, and that written concurrence from the General Accounting Office, under the provisions of Title 8 of the GAO Manual for Guidance of Federal Agencies,

is not required,  is attached, or  has been requested

DATE  
**12/23/03**

SIGNATURE OF AGENCY REPRESENTATIVE  
*[Signature: Markus Most]*

TITLE  
**EOP RECORDS OFFICER**

7 ITEM NO	8 DESCRIPTION OF ITEM AND PROPOSED DISPOSITION	9 GRS OR SUPERSEDED JOB CITATION	10 ACTION TAKEN (NARA USE ONLY)
	<p><b>Executive Office of the President            Office of Management and Budget (OMB)            Collaborative Authoring Tool (attached)</b></p>		

*21 9/17/04 Copies sent to Agency, NWMD, NWME*

**EXECUTIVE OFFICE OF THE PRESIDENT**

**OFFICE OF MANAGEMENT AND BUDGET**

This schedule applies to the collaborative authoring tool in the Office of Management and Budget (OMB), Executive Office of the President.

A collaborative authoring tool is a computer supported collaborative work environment that allows a team of two or more individuals to create a document together. The focus of the collaboration resides in the shared creation of an electronic object.

The collaborative authoring tool is intended to support OMB in its mission to serve the President by preparing the annual *United States Budget* and carrying out other statutory requirements, developing integrated fiscal, budget, program and management policies, leading government-wide coordination in policy making, and ensuring, through management oversight, government-wide effectiveness and consistency in policy implementation, in accordance with Presidential priorities.

**COLLABORATIVE AUTHORING TOOL (CAT)**

The following applies to the records managed by OMB's Collaborative Authoring Tool (CAT).

**1. CAT Managed Records – Online Records.**

Online records consist of documents in any electronic format tracked by CAT that have been determined to be Federal records. These records cover a wide range of OMB functions and document essential functions, policies, decisions, procedures, operations, or transactions of the Office of Management and Budget. The remaining records consist of pre-decisional documents, non-substantive changes to a document, and documents that have not been distributed for comment. Records documenting essential functions, policies, decisions, procedures, operations, or transactions of the Office of Management and Budget are moved offline and placed into a recordkeeping system ("archived" in OMB parlance). See Item 2 for archived records.

**DISPOSITION: TEMPORARY**

- A. Records necessary to document essential functions, policies, decisions, procedures, operations, or transactions of the Office of Management and Budget: Delete from Online Records only after moving to an offline recordkeeping system (see Item 2).
- B. All other online records: Delete when no longer needed for current business.

**2. CAT Managed Records – Archived Records.**

Records that are moved to an offline recordkeeping system because they document essential functions, policies, decision, procedures, operations, or transactions of the Office of Management and Budget. These records are programmatic files that cover budget review, economic policy, general government, human resources, legislative affairs, legislative reference, national security, natural resources, financial management, procurement policy, regulatory affairs, and e-government.

CAT Archived Versions: The organization responsible for the records should transfer archived versions of the records to a recordkeeping system. Utilize the existing records schedule for the responsible organization(s) or system to determine the appropriate actions.

3. **System maintenance records.** System maintenance records are those records necessary to make CAT function in a specific environment. These records include, but are not limited to hardware and software configuration.

**DISPOSITION:      TEMPORARY**

Delete when no longer needed for system use and maintenance.