



## RECORDS SCHEDULE SCOPING CHEAT SHEET

### Possible Combinations by Level of Aggregation

Level of Aggregation	Number of series or potential series	Area of Application
Individual series (granular) item	Single series	One office or organizational unit in one agency
Fixed/closed aggregate item	Single series	Multiple offices
Individual series (granular) item	Single, discrete electronic system	Any, as long as records from all users are captured in the same system
Fixed/closed aggregate item	Multiple series or electronic systems that are specifically identified on the schedule.  There is no intention to add new series that might be created in the future.	Any
Flexible/aggregate item	Multiple related series or electronic systems that are not specifically identified in their entirety on the schedule. The item may only describe the function, activity or work process with examples of records.  The intent is to cover all records that might ever be created related to the function, activity or work process. (See the <i>Guide to Aggregate Item Schedules</i> for more information.)	Any
Flexible/aggregate item	A function, activity or work process	Any

## Possible Combinations by Area of Application

Area of Application	Scope	Possible Levels of Aggregation
Office-based (Agency Subdivision - Major Subdivision)	Only applies to a specific office or business unit within the agency.	<p>Individual series (granular) items, including single, discrete electronic systems if only used by one office.</p> <p>Aggregate items are possible, most likely the fixed/closed variety.</p> <p>A mix of aggregate items and individual series items are possible on a single schedule.</p>
Agency-wide	<p>Applies to records wherever they are found in the agency.</p> <p>Appropriate for electronic systems that are used across multiple business units within the agency.</p>	<p>Aggregate items: Even if the schedule covers a single record series, it is an aggregate item because if the records are permanent they will be coming to NARA from multiple offices within the agency.</p> <p>Individual series (granular) items may be used to schedule single, discrete electronic systems.</p>
Department-wide	<p>Applies to records wherever they may be found across all component agencies within a Department.</p> <p>Appropriate for electronic systems that are used by all component agencies within a Department.</p> <p>Must be submitted by the Departmental Records Management office.</p>	<p>Aggregate items: Even if the schedule covers a single record series, it is an aggregate item because if the records are permanent they will be coming to NARA from multiple offices across multiple agencies.</p> <p>Individual series (granular) items may be used to schedule single, discrete electronic systems.</p>