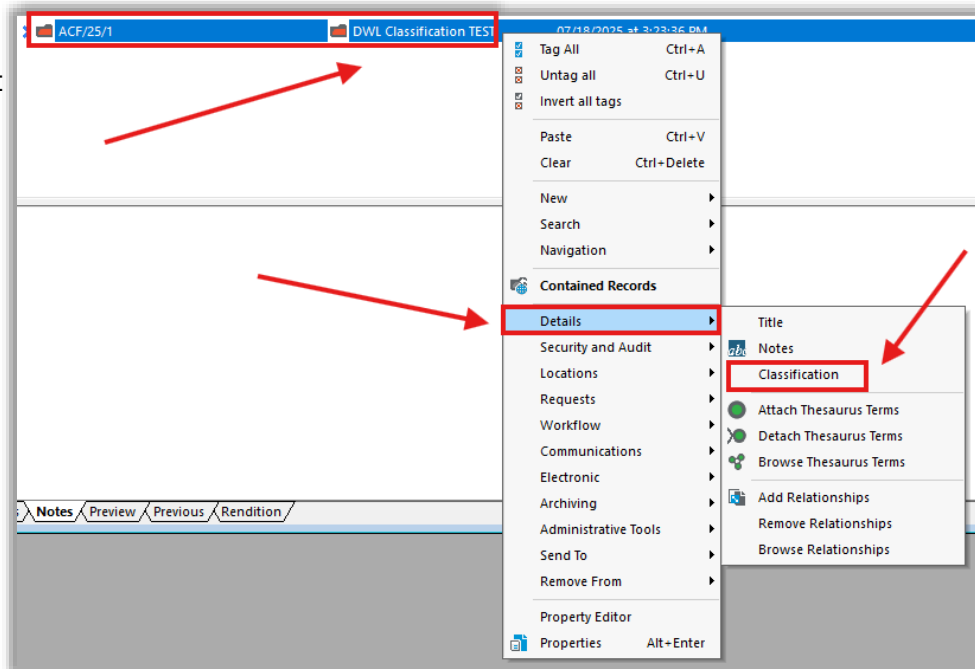


# Changing a Classification on a Classification Folder

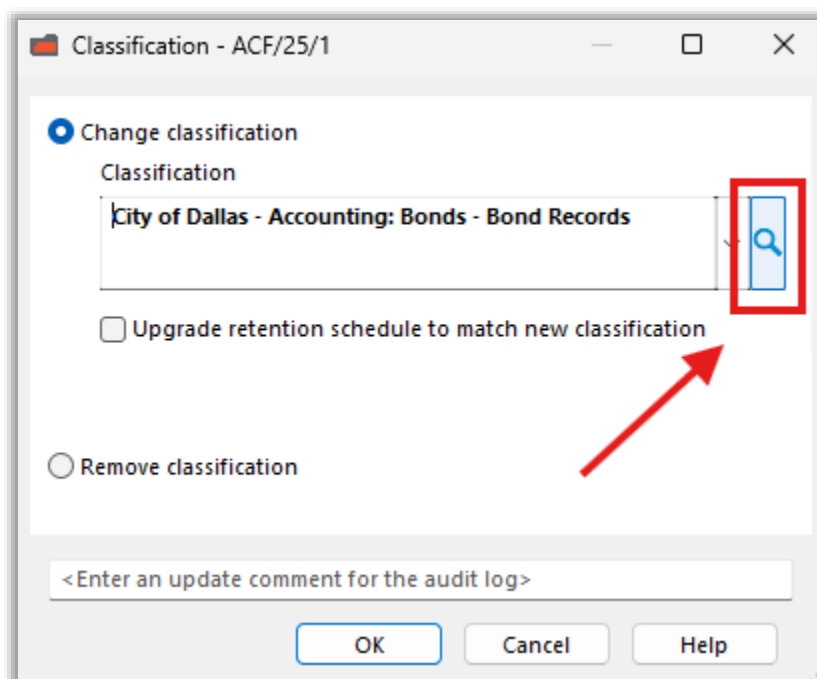
## (Changing a Retention Schedule)

**Step 1.** Find the Classification Folder on which you wish to change the current Classification (or Retention Schedule).

**Step 2. RIGHT-CLICK** on the folder, hover your cursor over **DETAILS**, then click on **CLASSIFICATION**.



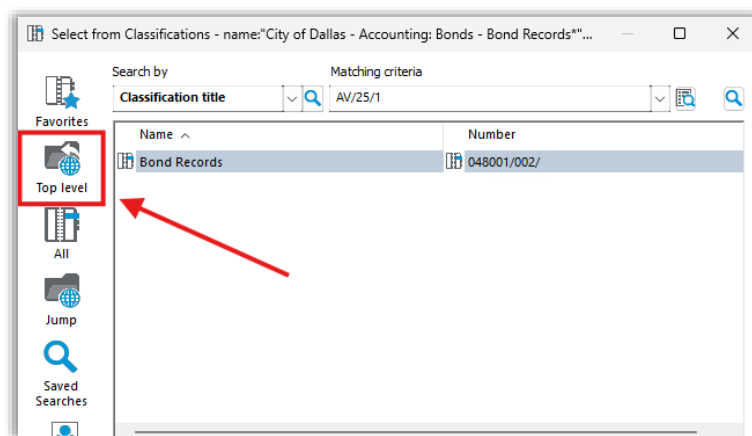
**Step 3.** On the pop-up window, click on the magnifying glass icon.



# Changing a Classification on a Classification Folder

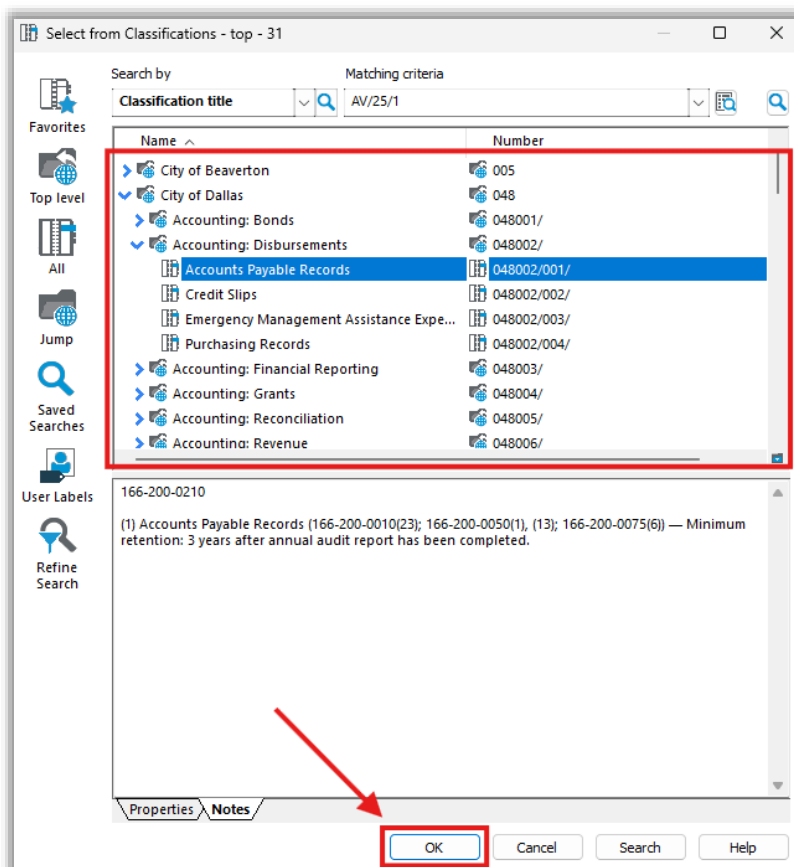
## (Changing a Retention Schedule)

**Step 4.** In the new window, click on the **TOP LEVEL** button to bring back the full list of Classifications.



**Step 5.** Find your agency in the listed selections, then select the appropriate Classification title. If your agency is not listed, use the applicable Classification from the appropriate general records schedule (e.g. city, county, state agency, etc.).

**Note:** Click on the > arrow icons to expand the contents of the selected Top-Level Classification, which will display all classifications nested within that section.



**Step 6.** Click on the **OK** button.

# Changing a Classification on a Classification Folder

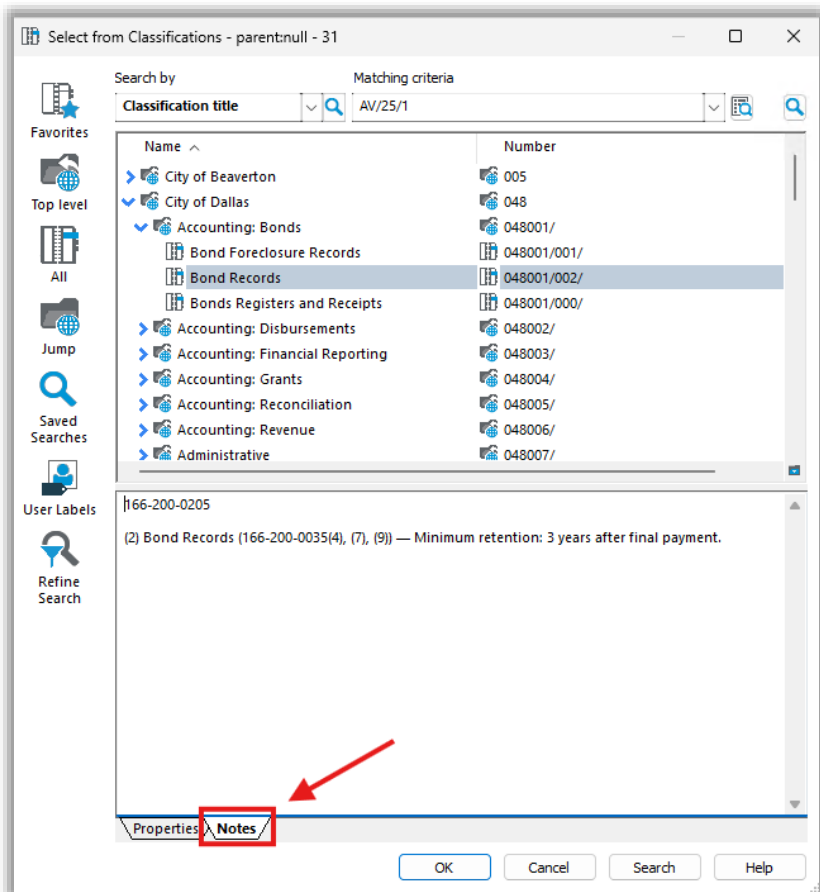
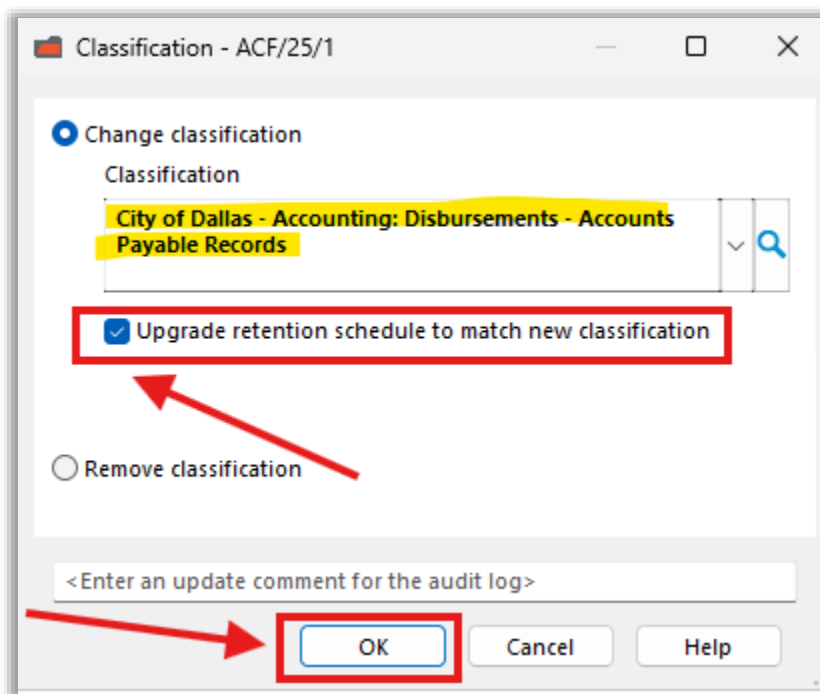
## (Changing a Retention Schedule)

**Step 7.** Once your new Classification is selected, click on the empty box next to “**Upgrade retention schedule to match new classification**” to make a checkmark. 

**Note:** It is **very important** to check the “**Upgrade retention schedule to match new classification**” option, otherwise the retention schedule triggers will not be updated.

**Step 8.** Click on the **OK** button.

**Note:** If you need more clarification on the retention schedule, click on the **NOTES** tab for more detailed information.



| Name                            | Number      |
|---------------------------------|-------------|
| City of Beaverton               | 005         |
| City of Dallas                  | 048         |
| Accounting: Bonds               | 048001/     |
| Bond Foreclosure Records        | 048001/001/ |
| Bond Records                    | 048001/002/ |
| Bonds Registers and Receipts    | 048001/000/ |
| Accounting: Disbursements       | 048002/     |
| Accounting: Financial Reporting | 048003/     |
| Accounting: Grants              | 048004/     |
| Accounting: Reconciliation      | 048005/     |
| Accounting: Revenue             | 048006/     |
| Administrative                  | 048007/     |

166-200-0205

(2) Bond Records (166-200-0035(4), (7), (9)) — Minimum retention: 3 years after final payment.