

DRS App User Training

Welcome!

The DRS app is where Records Liaisons create department retention schedules (DRS), individualized retention schedules for departments based on the approved General Retention Schedule (GRS) for their assigned departments.

This site automates much of the task of creating such retention schedules. A Record Liaison can use this site to create a retention schedule from an approved list of common records based on the General Retention Schedule entries.

Additionally, liaisons can create unique retention entries when a specific record does not accurately fall under the common records list. These items will be individually approved by a URIM admin once the unique record is created. Both a Record Liaison and Liaison Helpers can view the retention schedule's progress and create PDFs when complete. Only the Record Liaison will have access to make any edits to the schedule and submit it to the admin for review.

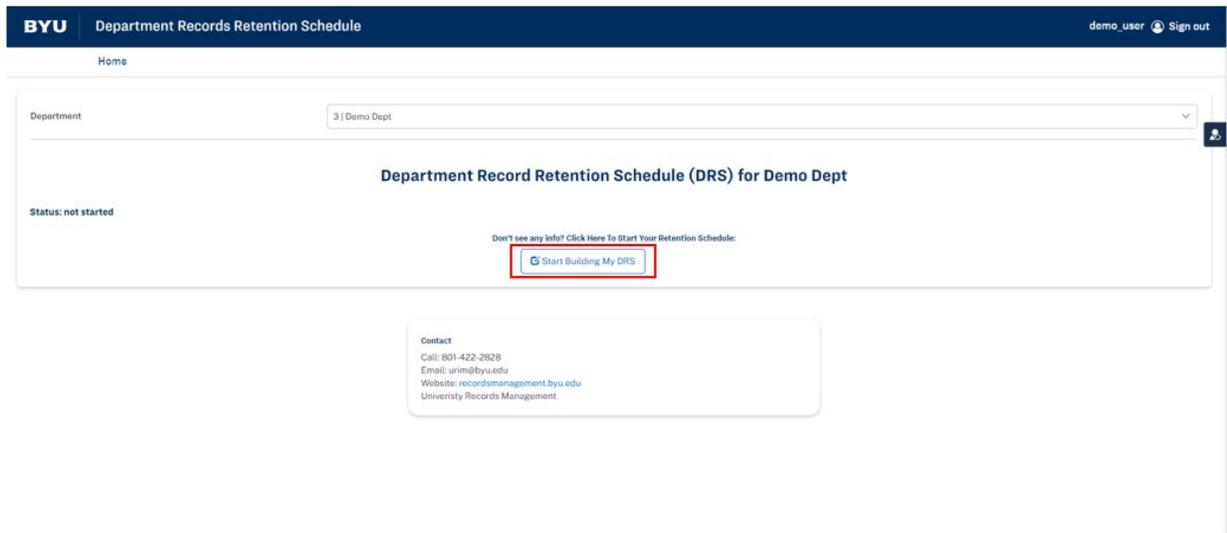
Step by Step User Guide

Login to drs.byu.edu with your BYU NetID and Password.

If you do not have access, email urim@byu.edu to request access to your department.

Getting Started

If your department has not yet started a retention schedule previously you will see the status set to “not started.” Simply click the “Start Building My DRS Button” to begin!



Add Unique Records

If your department has a retention type that doesn't fit under the common records category list, you can create a unique record by clicking "Create Your Own Record" at the bottom of the add page.

Upon clicking, a pop-up box will appear, allowing you to create a retention type unique to the department. The pop-up box will contain five input fields: the function type of the item from the General Retention Schedule, the record type or category, a typed-in record description, a retention description pulled from the GRS, and any comments about the item for future reference.

Note: The Record Type and Retention Description fields are automatically connected, ensuring legal retention based on your selection.

Departments Unique Items (double click to enlarge)

Curriculum records (may include course proposals, course revisions, course requests, and curriculum committee minutes). If not already maintained in online system, retain permanently. Submit curriculum records and committee minutes to University Records Center for Archival review.	Academic Add
Exams (administered) and coursework not returned to students. Also includes Zoom recordings of online classroom instruction. Retain 1 year after end of semester administered, then destroy.	Academic Add
Internship Records. Retain 5 years, then destroy.	Academic Add
Senior surveys & summaries (Graduating Student Exit Interviews). If not stored online by senior survey system, retain surveys for 5 years, then destroy. Transfer 1 copy of summaries to the University Records Center for Archival review.	Academic Add
Student files retained by dept. (Academic Advisement Records) - graduate & undergrad. Retain 5 years after graduation or 8 years after last enrolled, then destroy. (Retain records associated with licensing and professional certifications permanently).	Academic Add

[Load more...](#)

[Save and Go home](#) [Create Your Own Record](#)

Create Unique Record ×

Demo Dept - Create a Unique Record

Function of the Item
If you cannot find your desired record type below, please select Misc.
Administrative

Record Type
Business Continuity Planning

Record Description
Please describe your item for the admin to see.

Retention Description
Retain for 6 years after records are superseded or obsolete, then destroy.

Comments
Please add any comments in the section below

Please note all unique records will be sent to a URIM administrator to approve

[Submit](#) [Cancel](#)

Once created, click "Submit." An admin must approve it before appearing on your DRS homepage. View pending unique items via the pop-up page after submission or on the homepage under "Unique Records Waiting for Approval." From the pop-up, you can return home or add another unique item.

Thanks! An admin will now review this record and add it to your DRS

Department: Demo Dept ID: 3

Your Unique Items Under Review

Administrative	Fill in	No items found	Status: pending
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🏠 Go homeAdd another Unique Item

Add Unique Records with Custom Retention Description

If the desired unique item doesn't fit a record function or type, choose "Misc" as function and "Misc Custom" as record type. This allows typing in the retention description and specifying if the item is historical, confidential, or permanent. For term clarification, visit recordsmanagement.byu.edu.

Create Unique Record x

Demo Dept - Create a Unique Record

Function of the Item
If you cannot find your desired record type below, please select Misc.

Misc

Record Type

Misc Custom

Record Description
Please describe your item for the admin to see.

Retention Description
Add to the description of the retention period for this record

Is this item archival/historical?
 Yes No

Is this item highly confidential?
 Yes No

Does this item have a permanent retention?
 Yes No

Comments
Please add any comments in the section below

Please note all unique records will be sent to a URIM administrator to approve

View Pending Unique Records

At the bottom of the home page, you can see unique items still pending approval. To edit this item simply double-click the row.

The screenshot shows the 'Department Record Retention Schedule (DRS) for Demo Dept' interface. At the top, there is a header with 'BYU Department Records Retention Schedule' and a user profile 'demo_user Sign out'. Below the header, a dropdown menu shows '3 | Demo Dept'. The main content area is titled 'Department Record Retention Schedule (DRS) for Demo Dept'. On the left, the status is 'In progress'. A table lists retention items with columns for Function, Category, Retention, Comments, and Retention Type. The first row is highlighted in red and has a status of 'pending'. Below the table, there is a section for 'Retention Schedule Notes' and a sub-section for 'Unique Records Waiting for admin approval' which contains one row with the text 'Administrative Fill in No items found Status: pending'.

Sometimes, an admin may suggest edits to the unique item without making the changes themselves. In such cases, a notification box will appear next to the edit button. Also, the item's status will change to "requires edit," with notes next to it indicating the changes to be made.

The screenshot shows the 'Department Record Retention Schedule (DRS) for Demo Dept' interface. At the top, there is a header with 'BYU Department Records Retention Schedule' and a user profile 'demo_user Sign out'. Below the header, a dropdown menu shows '3 | Demo Dept'. The main content area is titled 'Department Record Retention Schedule (DRS) for Demo Dept'. On the left, the status is 'waiting approval'. A table lists retention items with columns for Function, Category, Retention, Comments, and Retention Type. The first row is highlighted in red and has a status of 'requires edit'. The 'Edit' button for this row is highlighted with a red box and has a notification icon next to it. Below the table, there is a section for 'Retention Schedule Notes' and a sub-section for 'Unique Records Waiting for admin approval' which contains one row with the text 'Administrative Fill in No items found Status: pending'.

Function	Category	Retention	Comments	Retention Type
Administrative	Annual and summary reports.	If not submitted to college/division, retain permanently. Transfer 1 copy to the University Records Center for Arch...		Hist
Administrative	Projects and studies.	Retain for 3 years, then transfer 1 copy of final, published reports and studies to the University Records Center fo...		Hist
Employment	Employee files retained by Depa...	Retain information originated by department indefinitely. Destroy remaining information 6 years after termination.		
Faculty	Faculty biographical information...	If not retained in Faculty Profile System, transfer 1 copy to the University Records Center for Archival review.		Hist

1 to 7 of 7

[+ Add Another Item](#)

Retention Schedule Notes

Unique Records Waiting for admin approval

Misc	Hold for three years	Admin: This would be a better fit in the Administrative section. Please connect it and then submit again.	5/1/2024	Status: need edit
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To edit, double-click the row where the status is "requires edit." A popup box will appear. Make the necessary changes and resubmit the item.

Create Unique Record x

Demo Dept - Edit your Unique Record

Function of the Item
If you cannot find your desired record type below, please select Misc.

Administrative

Record Type

Administrative Support, Routine

Record Description

Administrative Support, Routine

Comments
Please add any comments in the section below

Please note all unique records will be sent to a URIM administrator to approve

Where Unique Record Appears

Once approved, the unique records will be integrated with the selected common record list, appearing alphabetically by business function in the DRS.

Once finished, click the "DRS Complete" button to inform the URIM admin that your DRS is ready for review. If changes are necessary, the admin will contact you to request them, or the DRS will be marked as complete.

Update Your DRS

Record Liaisons are asked to review their department's retention schedule at least once a year. If changes need to be made, click "Edit" on the top right corner.

BYU Department Records Retention Schedule demo_user Sign out

Home

Department 3 | Demo Dept

Department Record Retention Schedule (DRS) for Demo Dept

Status: In progress

DRS Complete? Send to Admin Create PDF Edit Add Note

Function	Category	Retention	Comments	Retention Type
Academic	Academic unit reviews / educatio...	Retain for 1 review cycle (generally 7 years), then transfer 1 copy of self-studies, final reports and related commu...		Hist
Academic	Course/Faculty evaluations.	If not stored in online rating system, retain permanently.		
Academic	Exams (administered) and cours...	Retain 1 year after end of semester administered, then destroy.		
Administrative	Administrative Support, Routine	3	No current records	
Administrative	Annual and summary reports.	If not submitted to college/division, retain permanently. Transfer 1 copy to the University Records Center for Arch...		Hist
Administrative	Projects and studies.	Retain for 3 years, then transfer 1 copy of final, published reports and studies to the University Records Center fo...		Hist
Employment	Employee files retained by Depa...	Retain information originated by department indefinitely. Destroy remaining information 6 years after termination.		
Faculty	Faculty biographical information...	If not retained in Faculty Profile System, transfer 1 copy to the University Records Center for Archival review.		Hist

The edit feature offers 5 options:

1. **Comments:** Under Actions, a message button allows you to add comments to a DRS item. Adding comments won't affect the DRS status.
2. **Remove Button:** Next to the comment button, the remove button lets you remove the item from the DRS. Removing an item sets the DRS automatically to "in progress."
3. **Add another item:** At the bottom of the page, this button lets you add another common or unique item to the DRS. Adding another item changes the DRS status back to "in progress."
4. **Save:** Click "Save" to switch the home screen from edit view to normal view once finished.
5. **Status Bar:** The status bar indicates the progress of the DRS. Aim to have the status bar show "complete" unless editing or awaiting admin approval.

BYU Department Records Retention Schedule demo_user Sign out

Home

Department 3 | Demo Dept

Department Record Retention Schedule (DRS) for Demo Dept

Status: In progress

DRS Complete? Send to Admin Create PDF Add Note

Function	Record Type	Retention Description	Comments	Types	Action
Academic	Academic unit reviews / educational support unit reviews. ADM02	Retain for 1 review cycle (generally 7 years), then transfer 1 copy of self-studies, final reports and related communications to the University Records Center for Archival review. Destroy remaining documentation.		Hist	1 2
Academic	Course/Faculty evaluations. Archives	If not stored in online rating system, retain permanently.			3 4
Academic	Exams (administered) and coursework not returned to students. Also includes Zoom recordings of online classroom instruction. STU07	Retain 1 year after end of semester administered, then destroy.			5 6
Administrative	Administrative Support, Routine This is a set of admin records.	3	No current records		7 8
Faculty	Faculty biographical information, CVs, awards, publications and citizenship information. FAC03	If not retained in Faculty Profile System, transfer 1 copy to the University Records Center for Archival review.		Hist	9 10

Retention Schedule Notes