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 Common Records

The first step to creating a retention schedule is to add common record items. If you're starting, use the "Start Building My DRS" button, or click "Add Another Item" if the schedule is already in progress. These buttons will take you to the “Add Common Records” page.

On the page, two columns will appear: the left lists all common record entries not associated with your DRS, while the right column shows associated entries. To add a new entry, click the “Add” button next to it; the item will then appear on the right side.

Note: clicking "Add" automatically saves the item.

Currently there are 40+ common record types. To simplify, use the filter option. Clicking this button will open a new page based on the function category in the common records list.
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.

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.
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.
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.

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.
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.

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.

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.