Versatile Web Retention User Guide

To view current Ohio State University approved records retention schedules, visit Versatile Web Retention or, if accessing off-campus, use the proxy link. Below are instructions for searching retention schedules, records-related criteria, and legal citations.

[Note: If you receive a Public Records Request for a retention schedule, contact Records Management for an official copy of your unit’s retention schedule complete with front matter and approvals.]

General Navigation Instructions

1. Click (red banner) on any page to navigate back to the Home page.

View List of Current Retention Schedules

1. Click List Schedules icon or the Schedules tab to search for current retention schedules by department.

OR

2. Click (plus sign) next to Ohio State University
3. Click on the unit, then on the subunit. Record series titles with retention periods will appear on the right.
4. Click on the record series title to see additional details, such as the Description and Status.

5. Click (white triangle in orange circle) next to Show/Hide list of UDFs to see additional Notes about the record series.

6. Scroll down to see the legal Citations linked to the record series (if any).

Search Current Retention Schedules
1. Click Search Schedules (magnifying glass) to find all record series that contain a specific keyword or meet specified criteria.
2. Under the **Primary** tab, **always** start your search by selecting **Ohio State University** in the **Company** drop-down menu; only OSU record series are valid for your department records retention and disposition. (*Note: Do not search by All Fields as this will show results from other Ohio universities that use Versatile Retention.*)

3. If you would like to review record series for a specific unit and/or sub-unit, select from the **Department** drop-down menu. To see all schedules for a unit’s subunits, check the **Include sub-Departments** box.

4. You can also search by words in a **Schedule Title** or **Keywords for Description**. *[Search words must be entered exactly as they appear on the retention schedule, so use broad search terms to get results. It is not recommended to search on the User Defined Fields tab.]*

5. Click **Search** to see results. *(Click **Clear** to remove all search criteria and start a new search.)*
6. The total number of search results will display. Click the Schedule Title link to see the record series details or click New Search button to refine or broaden search.

![Schedule Search]

Legal Research
The research function allows users to research whether there are laws or regulations that could affect the retention and disposition of certain types of records. This citation database can be used as a starting point to see if records are affected by regulations or if regulations surrounding the retention of records have changed since the schedules were last updated. Not every record series has laws driving its retention period, and, there are additional factors that are used when setting retention schedules.

Citations will be formally attached to retention schedules when units work with Records Management on updates. Any unit that wants to add legal citations to their retention schedules should contact Records Management.

[Note: There are thousands of legal citations in Versatile Retention. If you know exactly what you are looking for (citation, industry, etc.), you can provide specific search criteria to yield more targeted results. However, if you are unsure of exactly what you need, you can use fewer search criteria and yield larger results.]

Searching the Citation Database

1. Click one of two options for Research to review legal citations for your unit’s records and/or industry.

![Research]

OR

Searching can be done in two ways:

1. Select search criteria from populated menus (you can use the Ctrl key to select multiple criteria within a menu).
Click the **Search** button to see results.

2. **Keyword and Boolean** searches
   a. Select the **Advanced** tab
   b. Enter keywords ([**Boolean operators**](#), such as AND, OR, NOT, can help broaden or narrow the search)
      i. You can tailor your search even more by selecting from the other tabs and populated menus described in option 1.

If a citation is identified that should be linked to a retention schedule, email the following information to [lib-records@osu.edu](mailto:lib-records@osu.edu):

- Citation Identifier
- Department (as it appears in VR)
- Schedule Title (as it appears in VR)

**Requesting a Personal Login**

To request changes to your unit’s unique schedule or University General Schedule record series for which your unit is responsible, contact the [University Records Manager](mailto:University Records Manager) to request a login.