### Wright State University

**RECORDS RETENTION SCHEDULE (RRS)**

**Instructions:** This form establishes a schedule of retention and disposal for the listed records series, based on procedures provided by Section 149.333 of the Ohio Revised Code. Offices are required to submit a Certificate of Records Disposal (CRD) to the University Records Manager prior to the disposal of records listed on their retention schedule, as per Wright State Policy 12220. This schedule shall become effective on the last date approved. Obtain approvals and return to the University Records Manager, Special Collections and Archives, 401 Dunbar Library. For assistance, please call ext. 2017, or write to chris.wydman@wright.edu.

#### Originating Office/Department Code: Content Acquisition and Management | CAM/ULTS
---

#### Division: University Libraries

**Dean/Director/Head:**  

**Department Chairperson/Manager:**  

**University Records Manager:**

**Head, Special Collections & Archives:**

#### Medium code:  
P=Paper, M=Microfilm/Fiche, E=Machine Readable

#### Value code:  
C=Confidential, H=Historical, R=Restricted, V=Vital

#### Description:

A separate retention period is required for each medium in the same records series.

<table>
<thead>
<tr>
<th>WSU Records Series Number</th>
<th>Medium Code</th>
<th>Value Code</th>
<th>Records Series Title and Description</th>
<th>IUC Number</th>
<th>Retention Period</th>
</tr>
</thead>
</table>
| ULTS07-01a                | E           | V          | Database-On-line-Acquisitions (III or Triple I)  
This is composed of a module for acquisition of library materials including serials. The database contains all records of each phase of the transaction (purchase orders, invoices, payments a) processed through Account Payable or b) paid with procurement card by University Libraries).  
**Note:** This series includes acquisition of monographs, serials and audiovisual materials as well as payment for binding of serials. | ACC1000 | Retain for two years on line and archive the previous two years on compact discs. Erase four years after the date of the transaction's completion. |
| ULTS07-01b                | P           | V          | Database-On-line-Acquisitions (III or Triple I)  
Triple I database-related hard-copy records such as ledgers and original or duplicate invoices.  
**Note:** For procurement card retention refer to General Schedule GS-37 (four years). | ACC1000 | Retain for four years and then destroy. |
| ULTS07-02                 | P/E         | V          | Reports-Annual Budget  
Report generated from the III Database. | FIN2010 | Retain electronic version for current fiscal year. Retain original report in paper format for six years, then review for continuing value. |

**Note:** Longer term storage may include, but not restricted to, archives, an institutional records storage center, and conversion to microfilm or other acceptable mass storage media (per Sec. 9.01 of the Ohio Revised Code).
# Wright State University
## RECORDS RETENTION SCHEDULE (RRS)
(continuation sheet)

1. **Medium code:** 
P=Paper, M=Microfilm/Fiche, E=Machine Readable  

2. **Value code:** 
C=Confidential, H=Historical, R=Restricted, V=Vital  

3. **Description:** 
A separate retention period is required for each medium in the same records series.

### Cataloguing

<table>
<thead>
<tr>
<th>WSU Records Series Number</th>
<th>Medium Code</th>
<th>Value Code</th>
<th>Records Series Title and Description</th>
<th>IUC Number</th>
<th>Retention Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>ULTS07-03</td>
<td>E</td>
<td></td>
<td>Cataloguing Records</td>
<td>ADM9910</td>
<td>Retain government documents for five years until superseded and shipping lists for the current financial year plus one. Then destroy shipping lists.</td>
</tr>
<tr>
<td>ULTS07-04</td>
<td>P</td>
<td></td>
<td>Report-Statistical-Monthly</td>
<td>ADM9910</td>
<td>Retain for three years, then review for continuing administrative value.</td>
</tr>
</tbody>
</table>

### Administration

<table>
<thead>
<tr>
<th>WSU Records Series Number</th>
<th>Medium Code</th>
<th>Value Code</th>
<th>Records Series Title and Description</th>
<th>IUC Number</th>
<th>Retention Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>ULTS07-05</td>
<td>P/E</td>
<td></td>
<td>Procedures-Department</td>
<td>ADM3000</td>
<td>Retain paper records while current plus ten years. Review for continuing administrative or historical value.*</td>
</tr>
<tr>
<td>ULTS07-06</td>
<td>P/E</td>
<td></td>
<td>Subject Files-Department Head</td>
<td>ADM9910</td>
<td>Retain for three years, then review for continuing administrative or historical value.*</td>
</tr>
</tbody>
</table>

**Note:** For retention of departmental monthly and annual reports, see retention schedule for the University Libraries' Administrative office, series ULAD07-10 and for individual monthly and annual reports submitted to the University Librarian see series ULAD07-11.

---

**Note:** Longer term storage may include, but not restricted to, archives, an institutional records storage center, and conversion to microfilm or other acceptable mass storage media (per Sec. 9.01 of the Ohio Revised Code).