



Creating and Sending Boxes to the State Records Center

What is a Record Series? Record series consist of document types that are kept together as a unit:

- because they relate to a particular subject,
- result from the same activity, or
- have a particular form and the same retention.

What is a UDDS Number? This is the billing number that the department uses. For example CALS starts with 07, SMPH starts with 53 etc.

What is a User Box ID Number? This is a unique number that the department creates and uses to keep track and manage boxes being sent out to the SRC.

What is the difference between the State Records Center and the UW-Madison Archives?

The State Records Center is a State run facility that stores inactive records until they meet retention. Departments retain legal custody of records.

The UW-Madison Archives is a Special Unit within the UW General Library System. Legal and physical custody of the records are transferred to the Archives.

The 8 Generally Accepted Recordkeeping Principles®

1. **Accountability**
2. **Transparency**
3. **Integrity**
4. **Protection**
5. **Compliance**
6. **Availability**
7. **Retention**
8. **Disposition**

Best Practices for Management of University Records

How do I send records offsite to the State Records Center for inactive storage?

1. **Get access if you don't already have it.** You will need to know your UDDS billing number and what record series you will be submitting records under. The link to the University Record schedules is. <https://www.library.wisc.edu/archives/records-management/retention-disposition/>
2. Once you have access to the State Records Center [Versatile Application](#), **pack your boxes with the folders that pertain to that record series. Do not mix record series.** For example if you have undergraduate student records pack them by year alphabetically. This can be done at the end of each academic year. The department should make the decision and document the decision of how long paper records will be kept onsite and then sent out to the SRC to complete the retention period.
3. **Create an inventory of the folders in the box.** Place a copy in the box and keep a copy for the department include the User Box Number. This inventory can be copied and pasted from the list into the description field in Versatile.
4. **A User Box Number: is a unique number that the department assigns consecutively to identify the box and is entered in Versatile when creating the box. This is a department record to keep track of boxes that have been sent out to the SRC.** Create a list of eligible User Box Numbers on a spreadsheet for the department to use and assign numbers as boxes are created for submission. These number should not duplicated.
5. **Login into Versatile** and create each box for submission.
6. Assign the record series when creating the box within the Versatile application. Under **Creation:** Enter the required information. When you get to Record Series click on the list icon to get to the schedules, not the one with the flashlight Icon. This will bring up the screen with the schedule to choose from. This is the list icon.  **See diagram's on back.**
7. **Enter the dates of the contents of the box.**
 - The **From Date** is the earliest dated folder in the box
 - The **To Date** which is the latest date in the box.
 - The **Event Date** will be the same as the To Date in most cases based off the retention schedule.
8. Once the box is completed hit Enter to submit the box and receive a label.
9. Keep the word description of the box with the SRC user number included together with the SRC Box number information to make it easier to identify and find content and boxes.



Job Aid

Creation of a box in Versatile and finding the associated record series

WISCONSIN DEPARTMENT OF ADMINISTRATION
State Records Center

PRODUCTION

Home Creation Retrieval Retention Security

Box Creation Page

Company: * 285A-UW MADISON

Department: * ARCHIVES

Record Series: * None

User Box Number: *

Type of Box: * None

Current Record Series: None

A-B-C-D-E-F-G-H-I-J-K-L-M-N-O-P-Q-R-S-T-U-V-W

GLOBAL COMPANY DEPARTMENT

[9]

90000000 FISCAL MANAGEMENT SUBJECT AND CORRESPONDENCE FILE

90000001 STATE FISCAL POLICIES AND PROCEDURES RECORDS (9000000

90000002 ROUTINE INTERNAL STATUS AND ACTIVITY REPORTS (90000002

90000003 NON-ROUTINE FINANCIAL REPORTS AND STUDIES (90000003.)

90000004 AUDIT REPORTS, AGENCY RESPONSES AND AUDIT FINDING R

90000005 AUDIT REPORTS, AGENCY RESPONSES, AND AUDIT FINDING R
EN (90000005.) [?]

At the **GLOBAL** level you will find all the UWSA record series. All university approved schedules begin with a UW. **NOTE: At this level find the record series that begin with a UW. All of the state's record series are kept at this level so be careful and scroll way down to the UW record series.** Check the Record Schedule first to know which records series number you will need. At the **COMPANY** Level are UW Madison Schedules, such as the Student Record Schedule. At the **DEPARTMENT** Level are the Unique Records Series that a department of unit. The example below demonstrates the sections to be completed.

WISCONSIN DEPARTMENT OF ADMINISTRATION
State Records Center

Versatile Enterprise Web Module

PRODUCTION Hello, PEG 285-EUSCH!

Home Creation Retrieval Retention Security Utility Help Logout

Box Creation Page

VIEW SAVED DRAFTS

Company: * 285A-UW MADISON

Department: * ARCHIVES (490100/) ← Dept UDDS

Record Series: * UWADM018: AGENDAS/MINUTES (UWADM018.) ← Record series from approved record schedules

User Box Number: * 0001 ← assigned by Dept and managed on a spreadsheet

Type of Box: * A-FULL SIZE BOXES

From Date (MM/DD/YYYY): * 07/01/2016 ← Beginning date of content in the box

To Date (MM/DD/YYYY): * 12/31/2016 ← Ending date of content in the box

Event Date (MM/DD/YYYY): * 12/31/2016 ← Date is the same as the TO DATE

Description: * 2016 June through December University Records Management Advisory Committee Meeting Minutes and Agenda

A complete description can be created in a word document and then copy and pasted here. If the boxes contain employees, student etc. list each person out to make it easier to search.

NOTE: If more that one box is needed for the content the dates should be the same on all boxes and marked 1 of 3; 2 of 3; 3 of 3 in the description. An example would be a closed research study should be kept together but may need several boxes.

ADD FILES **SUBMIT BOX** SAVE AS DRAFT CLEAR Help?

* Required field