Creating Inventory in Versatile

The State Records Center uses Versatile to manage records boxes (referred to as inventory) sent to them for offsite storage. This document outlines instructions for UW–Madison units creating and submitting inventory in Versatile.

Instructions

1. Log in to Versatile using your user ID and password that you received from the State Records Center (SRC). The company field should be set to 285A-UW Madison.

   Your user ID typically starts with an A and ends with the first 2 letters of your last and first name. If you forgot your username or password, please contact the SRC directly.

2. Once you're logged in to Versatile, select "Creation" from the toolbar at the top of the screen and click on "Box Creation Request".

3. In the "Box Creation Page", make sure the company field is set to 285A-UW Madison.

Box Creation Page

Company: * [285A-UW MADISON ⌄]

4. Your department may already be selected, but if not, use the search or list function to select your department. You can select your department from a list by clicking on the list icon (looks like a bullet list). This is the recommended method if you don't know your UDDS. If you know your UDDS, you can select your department by clicking the search icon (a magnifying glass) and entering your UDDS.

Department: * 🔍 ☰ None

5. You must assign a record series (records retention schedule) to the box. Do not put records in the same box that fall under more than one records retention schedule. It is recommended that you locate the record series using the record schedules found on the UW-Madison Records Management website. Once you found your records retention schedule on the UW-Madison Records Management website, you can search for the title in Versatile by clicking on the search icon (a magnifying glass) in the "Record Series" field.

Record Series: * 🔍 ☰ None

6. The user box number is strictly for your department's use and isn't used by the State Records Center for inventory purposes. The user box number can be a mixture of letters and numbers up to 20 characters long. For more tips about creating a user box number, see the "Creating User Box Numbers" tab on the Using the State Records Center webpage.

User Box Number: * [   ]

7. The "Type of Box" field should always be set to "A-FULL SIZE BOXES".

Type of Box: * [A-FULL SIZE BOXES ⌄]

8. The "from date" and "to date" fields should reflect the date of the records inside the box. You should know at least the year. If you need to estimate the month and day for the to and from date, you can use January 1 (from date) and December 31 (to date).

   | From Date (MM/DD/YYYY): * | 01/01/2021 | 31 |
   | To Date (MM/DD/YYYY): * | 12/31/2025 | 31 |

9. The event date is the date the retention event occurred. The State Records Center (SRC) uses this date to determine how long the records must be held. To determine this date, check the records retention schedule you used in step 5 to identify the event.

   For example, if the retention event is "creation", the date should be the most recent creation date of the records in the box. If you have records in the box that were created between January 1, 2001, and December 31, 2010, the event date would be December 31, 2010.

   The retention time will be automatically calculated from the date you enter. Don't add the retention time to the date you enter.

   The event date is very important to how the records are managed at the SRC. If you have any questions about determining the event date, please contact the Records Management Program.

   | Event Date (MM/DD/YYYY): * | | 31 |

10. The description should adequately describe the records in the box. There should be enough information for another department staff member to easily identify the records in the box. Do not include personally identifiable information (PII), such as social security numbers, or other confidential/sensitive information in the description field.

    | Description: * | |

Once you have completed all the required fields, you have the option to submit your box or save your inventory as a draft to submit later. To save your box as a draft, click on the "Save as Draft" button. To submit your box, click on the "Submit Box" button. Repeat steps 1-10 until you're ready to review your submissions.

You will get confirmation that your box was submitted or that your draft was saved.

Viewing and Editing Draft Inventory

If you saved your box as a draft, click on "View Saved Drafts" to edit or submit your drafts. This will open a new window.

Click on "Edit" to review and edit your boxes. Once you're ready to submit the box, click on the "Submit Draft as Box" button. Before submitting, be sure to double-check for duplicate entries! When you submit your box, you will get confirmation. You can also click on the "Create New Box" link if you have additional boxes to add.

Click the red X icon to delete and cancel a box from your list.

Reviewing Submitting Inventory

When you click on the "Submit " button, a confirmation will display on the screen. You will have the option to create a new box by clicking on the "Create New Box" link.

Once you've finished submitting your inventory, review your submission(s) to make sure there are no duplicates and all the information is correct. To review your submitted inventory, go to Creation on the toolbar at the top of the page and click on "My Box Requests".
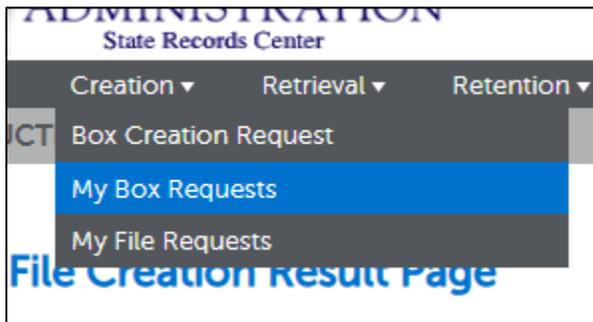
The submitted requests will appear on the My Box Request page. The results can be filtered by date submitted/requested and status (cancelled, pending, and complete). It is recommended when reviewing requests to set the status to "All" or check the box next to Display All Requests?

If the request is pending, it will say "Pending" in the SRC Box Number column. This means it can still be edited or cancelled. To edit, click on the pencil icon under "Actions". To cancel, click on the red X icon.

If there is a number in the SRC Box Number column, please contact the Records Management Program to delete the box from Versatile or assist with updating the box information.

Once inventory has been submitted, the State Records Center will process the request. Box labels and information about next steps will be sent through inter-department mail to the address listed on the Authorized User's account. If you need to update your information, follow the steps to Update Contact and Personal Info.

Where Can I Get Help?

For questions about records management at UW–Madison, please contact the Records Management Program directly. You can also go to the Records Management website, which has additional information and training for units that use the State Records Center.

For questions about Versatile and State Records Center inventory, contact the State Records Center directly by email at doadeorecordscenter@wisconsin.gov or by phone at 608-266-2995.