

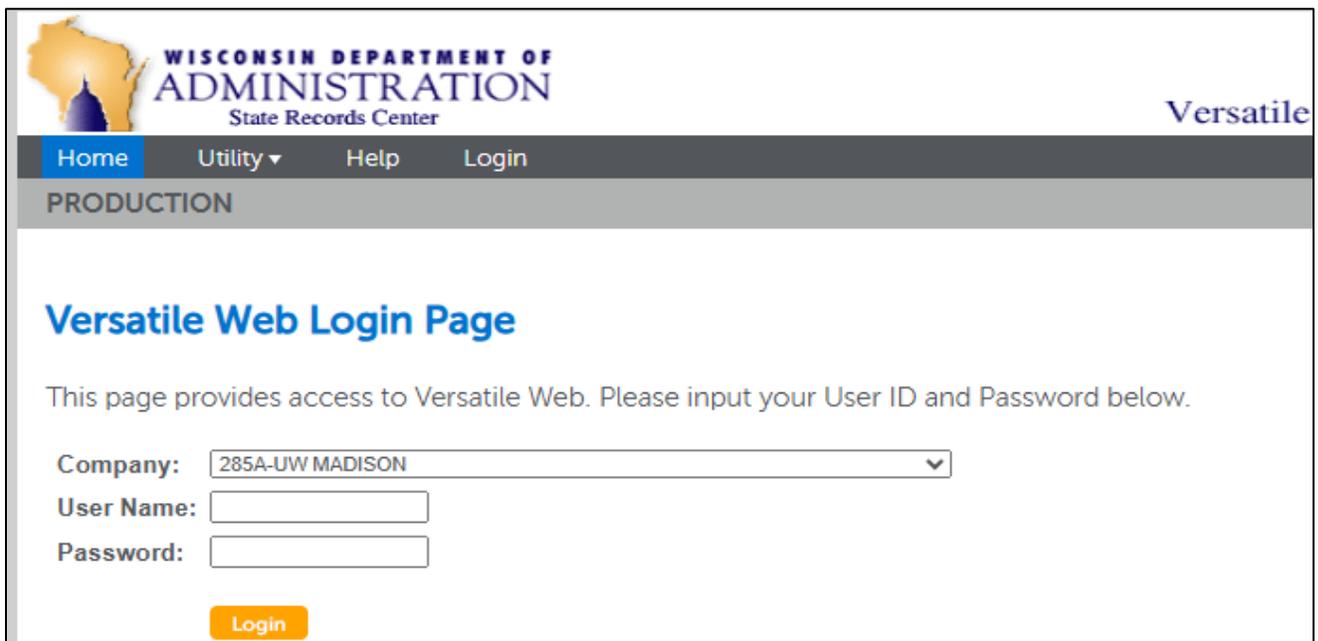
# Requesting Boxes in Versatile

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 who want to request boxes from the State Records Center using Versatile.

## Instructions

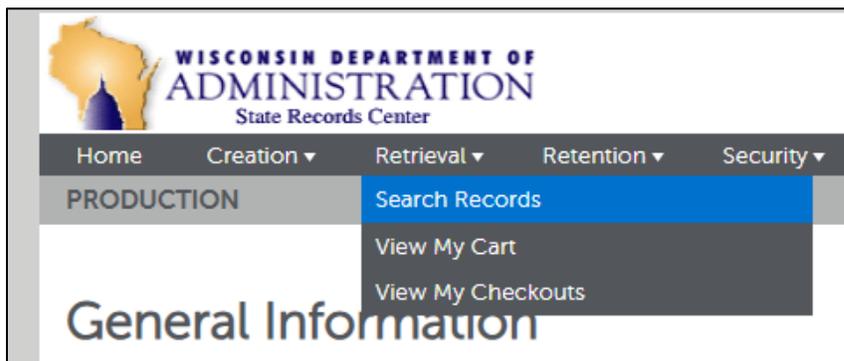
1. Log in to Versatile using your user ID and password that you received from the State Records Center (SRC). The company field should be set to 285A-UW Madison.

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.



The screenshot shows the Versatile Web Login Page. At the top left is the Wisconsin Department of Administration logo and text. At the top right is the word "Versatile". Below the logo is a navigation bar with "Home", "Utility", "Help", and "Login". Below the navigation bar is a grey bar with the word "PRODUCTION". The main content area has the heading "Versatile Web Login Page" and a sub-heading "This page provides access to Versatile Web. Please input your User ID and Password below." Below this are three input fields: "Company:" with a dropdown menu showing "285A-UW MADISON", "User Name:" with a text box, and "Password:" with a text box. At the bottom is a yellow "Login" button.

2. Once you're logged in to Versatile, select "Retrieval" from the toolbar at the top of the screen and click on "Search Records".





- In the "Versatile Search" page, click on the "Advanced Criteria" tab. Select your department by clicking on the magnifying glass icon next to Department.

### Versatile Search

Search In:  Boxes Results per page: 10

BASIC CRITERIA  
  BOX CRITERIA  
  **ADVANCED CRITERIA**  
  STATE

---

Company:  285A-UW MADISON

Department:  None  
 Include Sub-Departments

Record Series:  None  
 Include Sub-Record Series

Create Dates (MM/DD/YYYY):  [ ] 31 to [ ] 31

Submit Dates (MM/DD/YYYY):  [ ] 31 to [ ] 31

Event Dates (MM/DD/YYYY):  [ ] 31 to [ ] 31

Content Dates (MM/DD/YYYY):  [ ] 31 to [ ] 31

Submitted By:  None

Type of Box:  None

To list the inventory of a particular company, department or record series, check the box next to the appropriate item(s) and select a criteria. By choosing only a record series and selecting the checkbox to search in boxes, the results will list all the boxes in the specified record series.

- 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

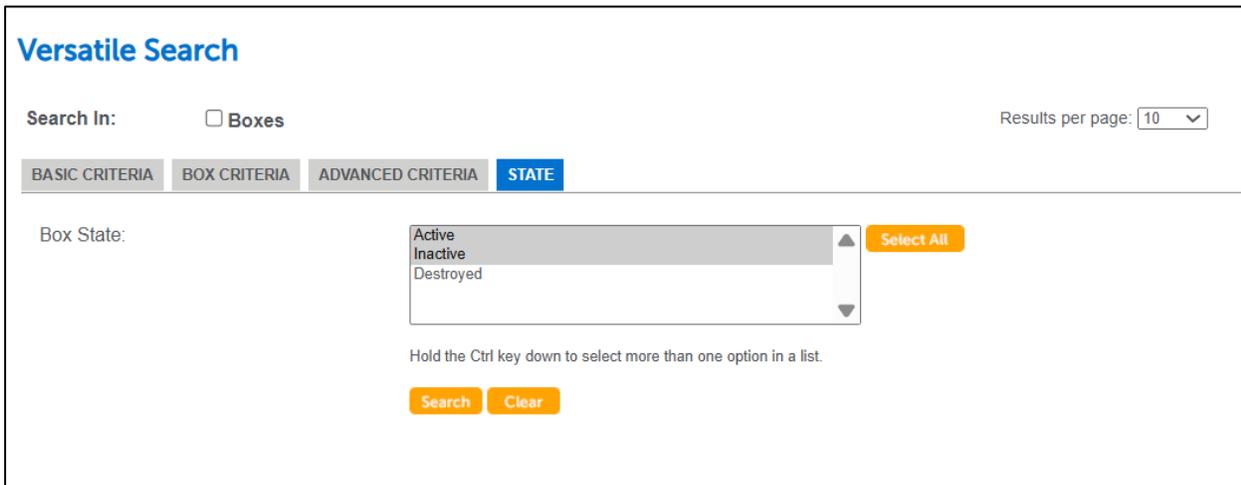
Click on your department from the list.

Current Department: None

**[285A-UW MADISON]**

ARCHIVES (/490100/)

- Click on the "State" tab and click on the "Clear" button. After you have clicked on the "Clear" button, click on the "Search" button.



**Versatile Search**

Search In:  Boxes Results per page: 10

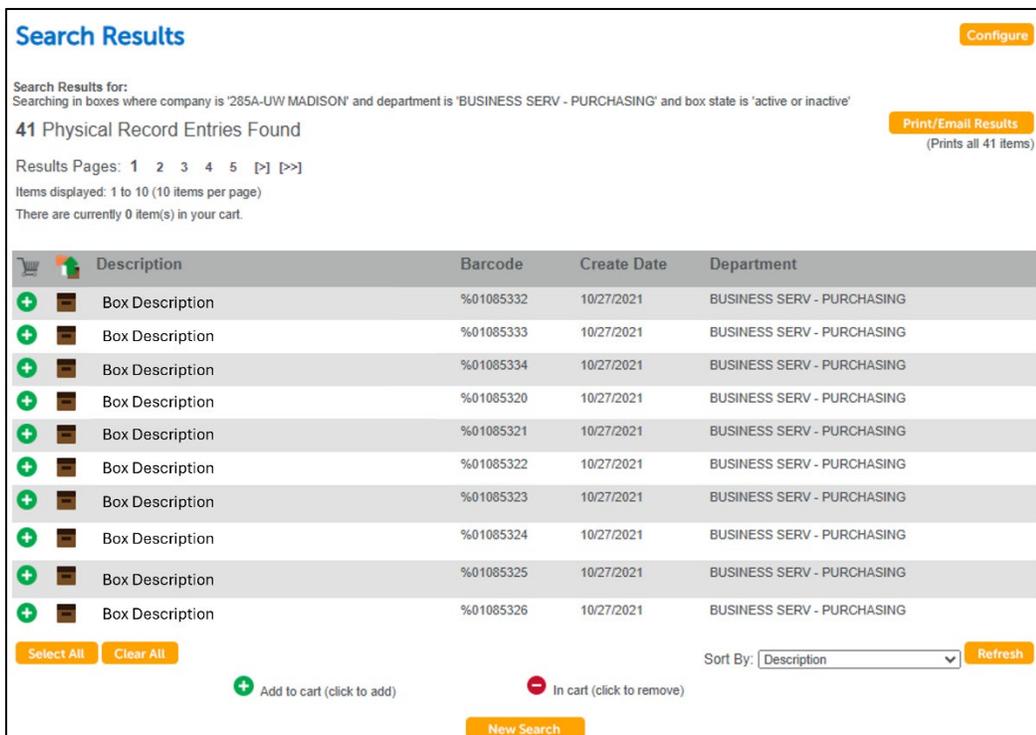
BASIC CRITERIA   BOX CRITERIA   ADVANCED CRITERIA   **STATE**

Box State: Active  
Inactive  
Destroyed Select All

Hold the Ctrl key down to select more than one option in a list.

Search Clear

- The "Search Results" page will show all the boxes that your department stores at the State Records Center. To view the box details, click on the "Box" icon. To check out a box, click on the green plus sign icon. This will add the box to your cart. You can add as many boxes as needed to your cart by repeating this process.



**Search Results** Configure

Search Results for:  
Searching in boxes where company is '285A-UW MADISON' and department is 'BUSINESS SERV - PURCHASING' and box state is 'active or inactive'

**41 Physical Record Entries Found** Print/Email Results  
(Prints all 41 items)

Results Pages: 1 2 3 4 5 [ ] [ >> ]

Items displayed: 1 to 10 (10 items per page)

There are currently 0 item(s) in your cart.

|   | Description     | Barcode   | Create Date | Department                 |
|---|-----------------|-----------|-------------|----------------------------|
| + | Box Description | %01085332 | 10/27/2021  | BUSINESS SERV - PURCHASING |
| + | Box Description | %01085333 | 10/27/2021  | BUSINESS SERV - PURCHASING |
| + | Box Description | %01085334 | 10/27/2021  | BUSINESS SERV - PURCHASING |
| + | Box Description | %01085320 | 10/27/2021  | BUSINESS SERV - PURCHASING |
| + | Box Description | %01085321 | 10/27/2021  | BUSINESS SERV - PURCHASING |
| + | Box Description | %01085322 | 10/27/2021  | BUSINESS SERV - PURCHASING |
| + | Box Description | %01085323 | 10/27/2021  | BUSINESS SERV - PURCHASING |
| + | Box Description | %01085324 | 10/27/2021  | BUSINESS SERV - PURCHASING |
| + | Box Description | %01085325 | 10/27/2021  | BUSINESS SERV - PURCHASING |
| + | Box Description | %01085326 | 10/27/2021  | BUSINESS SERV - PURCHASING |

Select All
Clear All
Sort By: Description Refresh

+ Add to cart (click to add)
 - In cart (click to remove)

New Search



If a box icon shows a circle with a line through it (no symbol), this means the box is already checked out and cannot be requested.

|  |  | Description     | SRC Box Number | User Box Number | From Date  | To Date    |
|--|--|-----------------|----------------|-----------------|------------|------------|
|  |  | Box Description | 1093996        | Box Number      | 01/01/2018 | 12/31/2018 |

- Once you've added all the boxes you want to check out, click on the "View" button at the top right of the page.

### Search Results

Search Results for:  
Searching in boxes where company is '285A-UW MADISON' and department is 'BUSINESS SERV - PURCHASING' and box state is 'active or inactive'

**41 Physical Record Entries Found**

Results Pages: [1](#) [2](#) [3](#) [4](#) [5](#) [[>](#)] [[>>](#)]

Items displayed: 1 to 10 (10 items per page)

There are currently 1 item(s) in your cart.

[View](#) [Empty](#)

- On the "Item Selection Cart" page, click on the "Request" button at the top right of the page. If you need to remove boxes from your cart, click on the red minus symbol.

### Item Selection Cart

There are currently 1 item(s) in your cart.

[Request](#)

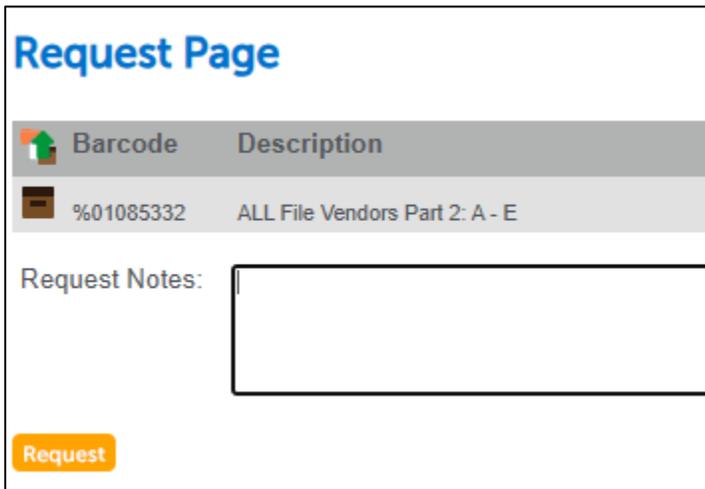
[Back](#) [Empty](#)

|  |  | Barcode   | Description                    |
|--|--|-----------|--------------------------------|
|  |  | %01085332 | ALL File Vendors Part 2: A - E |

In cart (click to remove)

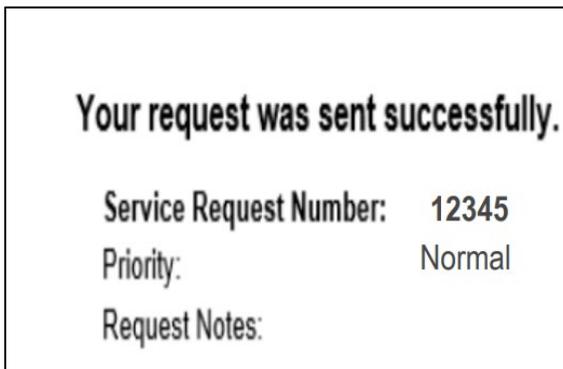
- On the "Request" page, click on the "Request" button. For brief instructions to the delivery staff, enter it in the "Request Notes" field. Do not add a delivery address in this field. The State Records Center (SRC) will deliver to the address they have on file for you.

If you need to update your contact information with the SRC, please contact the [Records Management Program](#).



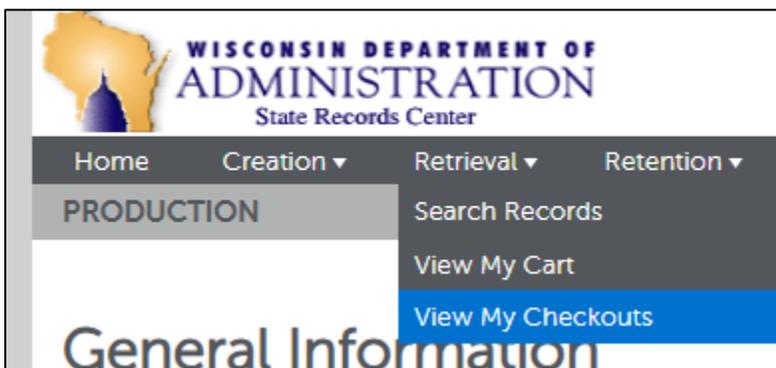
The screenshot shows a web interface titled "Request Page". It features a table with two columns: "Barcode" and "Description". The first row contains the barcode "%01085332" and the description "ALL File Vendors Part 2: A - E". Below the table is a "Request Notes:" label followed by a large empty text input box. At the bottom left of the form is an orange button labeled "Request".

10. If the request was successful, the page will say "Your request was sent successfully. It will also include a service request number.



The screenshot displays a confirmation message: "Your request was sent successfully." Below this message, the following details are listed:  
Service Request Number: 12345  
Priority: Normal  
Request Notes:

11. To view the list of boxes you requested, select "Retrieval" from the toolbar at the top of the page and click on "View My Checkouts".



The screenshot shows the navigation menu for the Wisconsin Department of Administration, State Records Center. The menu includes the following items:  
Home  
Creation ▾  
Retrieval ▾  
Retention ▾  
PRODUCTION  
Search Records  
View My Cart  
View My Checkouts (highlighted in blue)  
General Information



This will take you to the “My Checkouts” page, and you can see the list of boxes checked out. If there are questions about a request, contact the SRC at [DOADEORecordsCenter@wisconsin.gov](mailto:DOADEORecordsCenter@wisconsin.gov) or (608) 266-2995. Have the service request number ready for reference.

### My Checkouts

Transaction Date:   to   Display All Users?

Recipient: MACKENZIE 285-RYAN

| Barcode                       | Department | Description | Pickup Status |
|-------------------------------|------------|-------------|---------------|
| No checkout detail to display |            |             |               |

## 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](mailto:doadeorecordscenter@wisconsin.gov) or by phone at 608-266-2995.