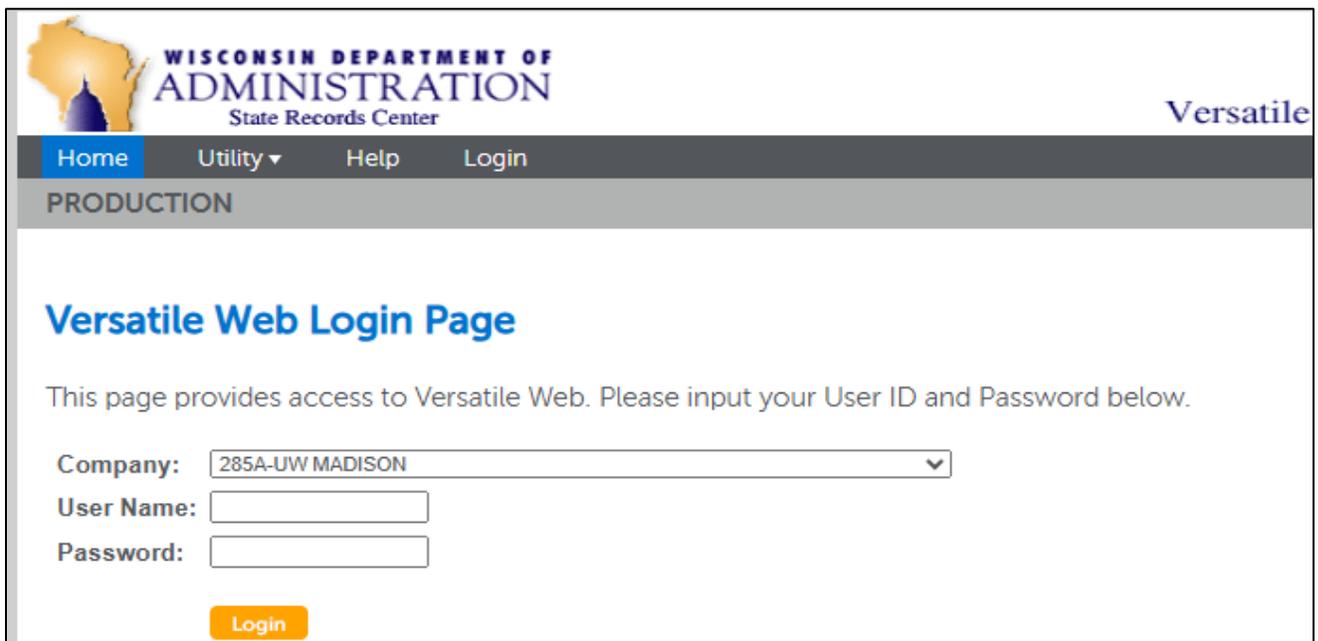![Archives & Records Management — UNIVERSITY OF WISCONSIN-MADISON](logo)

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.

2. Once you're logged in to Versatile, select "Retrieval" from the toolbar at the top of the screen and click on "Search Records".
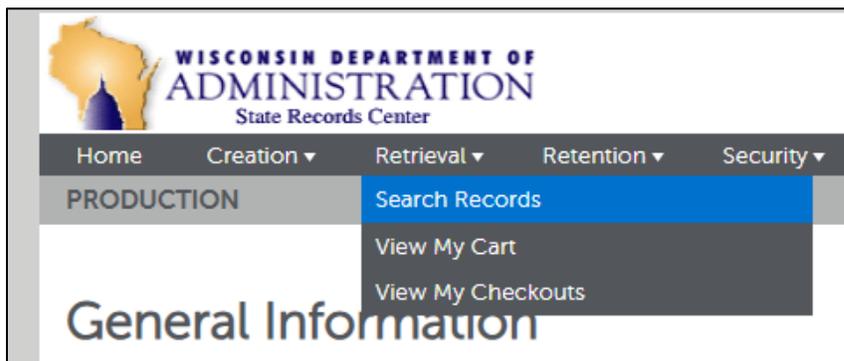
3. In the "Versatile Search" page, click on the "Advanced Criteria" tab. Select your department by clicking on the magnifying glass icon next to Department.

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.
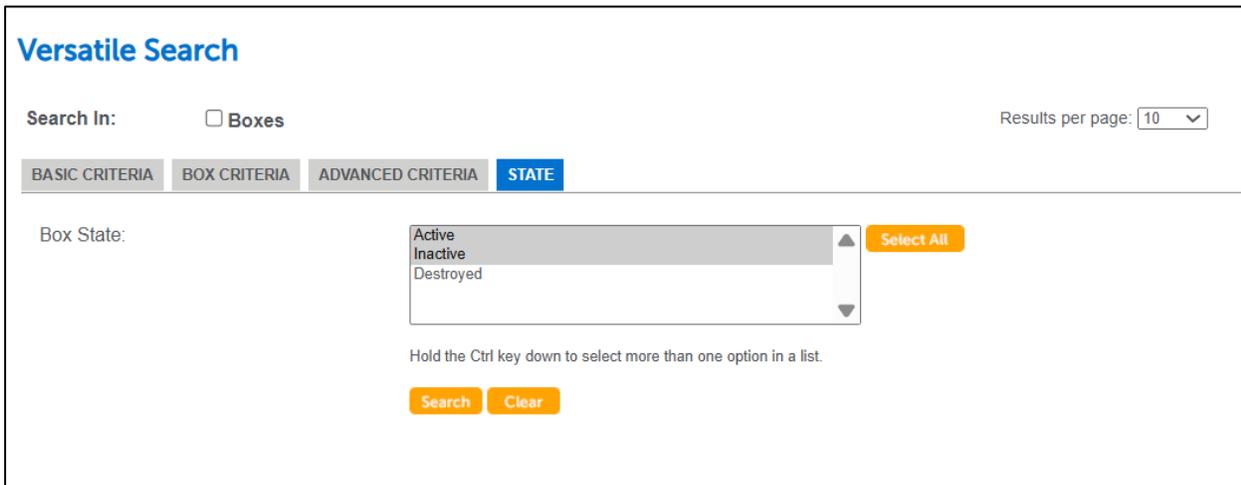

Click on your department from the list.

5. 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**

6. 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.
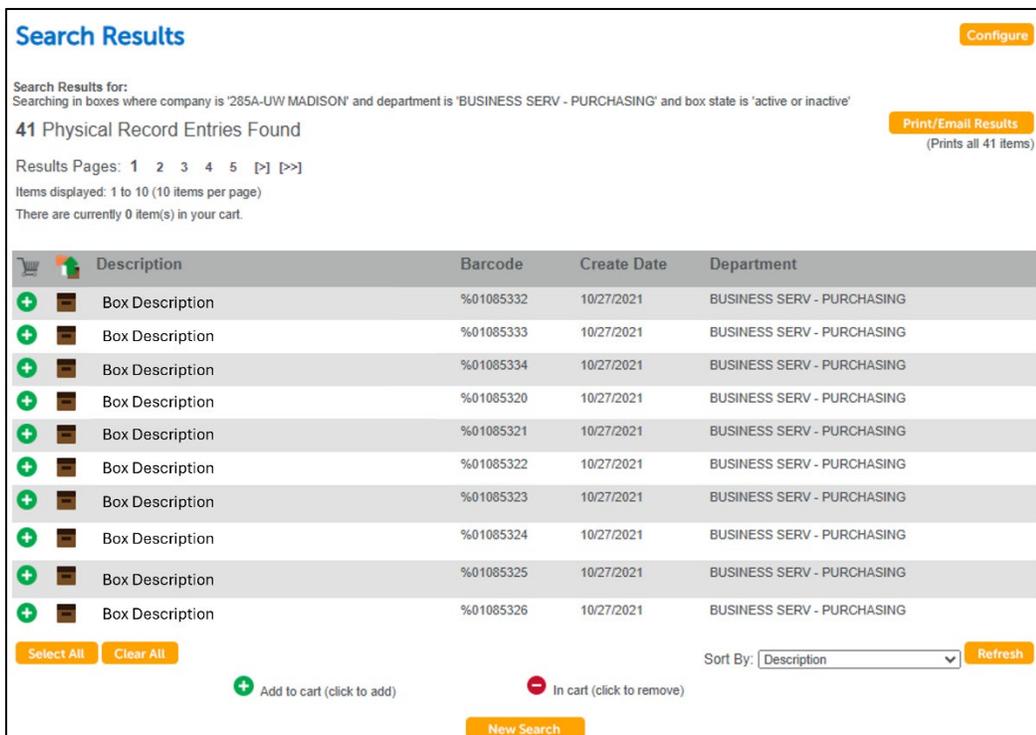
Search Results   **Configure**

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

7. 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

8. 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)

9. 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](#).
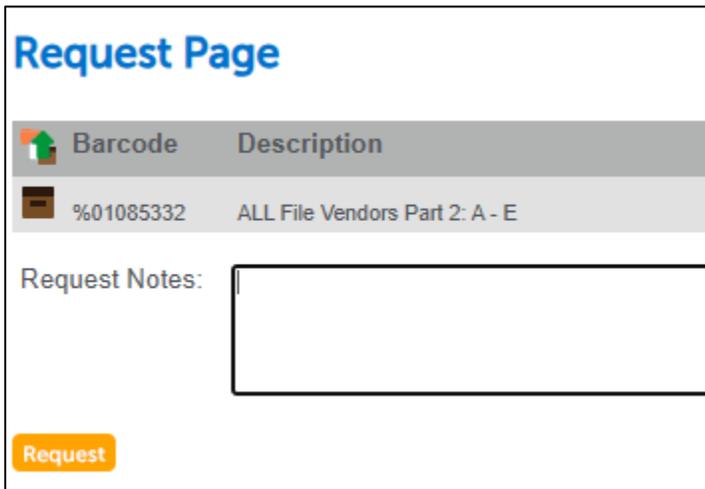
Request Page

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

Request Notes:

Request

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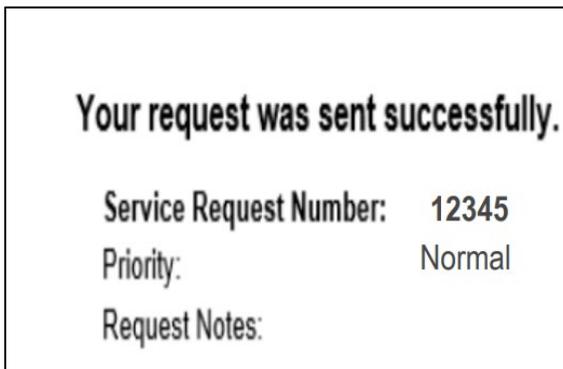
Your request was sent successfully.

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".
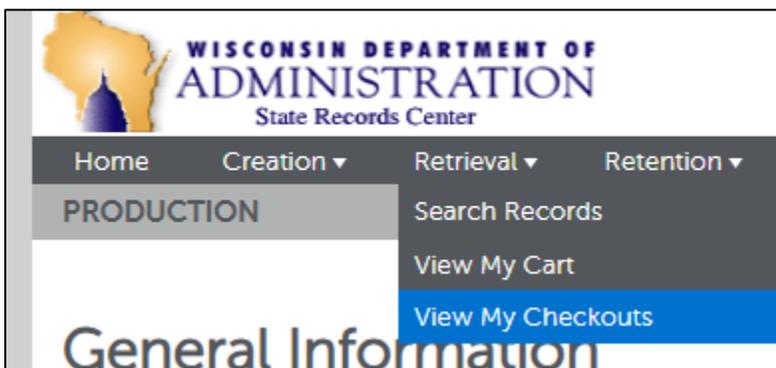
WISCONSIN DEPARTMENT OF
ADMINISTRATION
State Records Center

Home   Creation ▼   Retrieval ▼   Retention ▼

PRODUCTION

Search Records

View My Cart

View My Checkouts

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 or (608) 266-2995. Have the service request number ready for reference.

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.