

Running Reports and Viewing Boxes in Versatile

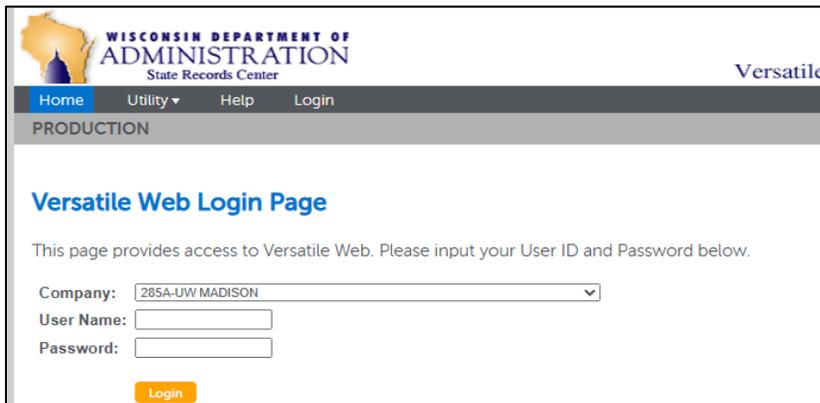
The State Records Center (SRC) uses Versatile to manage records boxes (referred to as inventory) sent to them for offsite storage. This document outlines instructions for UW-Madison units that want to create reports that list the boxes their unit stores at the SRC.

You can use the links below to navigate the sections of this guide.

- [Running a Report for Department Inventory \(Boxes\) at the State Records Center](#)
- [Searching for and Viewing for Individual Box Details](#)
- [Running a Report on Destructed Boxes](#)

Running a Report for Department Inventory at the State Records Center

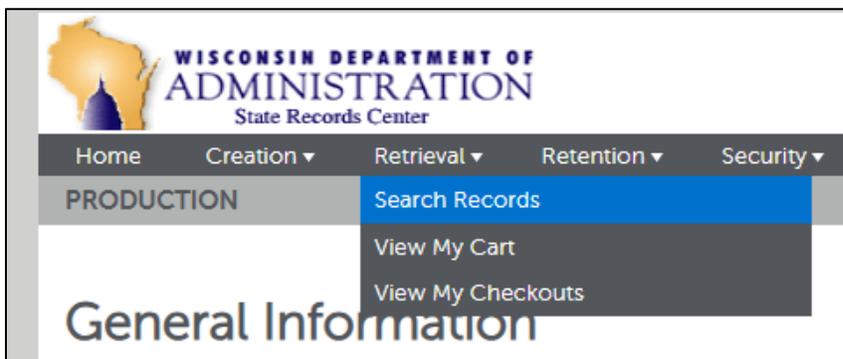
1. Log in to Versatile using your user ID and password that you received from the State Records Center (SRC). The company field should be set to 285A-UW Madison.



The screenshot shows the Versatile Web Login Page. At the top, there is a navigation bar with 'Home', 'Utility', 'Help', and 'Login'. Below this is a 'PRODUCTION' header. The main content area is titled 'Versatile Web Login Page' and contains the text: 'This page provides access to Versatile Web. Please input your User ID and Password below.' There are three input fields: 'Company' (a dropdown menu with '285A-UW MADISON' selected), 'User Name', and 'Password'. A yellow 'Login' button is located at the bottom of the form.

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".





- 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.

Search Clear

- 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

Lookup

[285A-UW MADISON]

ARCHIVES (/490100/)

- After selecting your department, click "Search" to produce a list of all boxes stored by your department at the State Records Center.

Versatile Search

Search In: Boxes Results per page: 10

BASIC CRITERIA | BOX CRITERIA | **ADVANCED CRITERIA** | STATE

Company: 285A-UW MADISON

Department: BUSINESS SERV - PURCHASING
 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.

[Search](#) [Clear](#)

- Clicking on any of the linked fields in a row will open a detailed box description, which will show the following information.

Box Description

[Open Printable Window](#)

SRC Box Number: 1085332

Title:	
Company:	285A-UW MADISON
Department:	BUSINESS SERV - PURCHASING (/036500/)
Record Series:	FIS00020: RECEIPTS AND DISBURSEMENT TRANSACTIONS (FIS00020.)
Box Barcode:	%01085332
Box RFID:	
User Box Number:	TestBoxNumber
Record Center ID:	
Box State:	Inactive
Create Date:	10/27/2021
From Date:	07/01/2021
To Date:	06/30/2022
Event Date:	06/30/2022
Misc Date:	
Type of Box:	A-FULL SIZE BOXES
Box Location:	UPPER SHELVING, 018-018-0003 0002
Alt. Location:	
Calculated Retention:	FIS+6
Calculated Destruct:	07/01/2028
Disposition Method:	DEST
Submitted By:	A491000-BuckyBadger
Checkout Status:	Available
Notes:	
Description:	Box Description
Cart Status:	There are currently 0 item(s) in your cart. +

[Back](#)

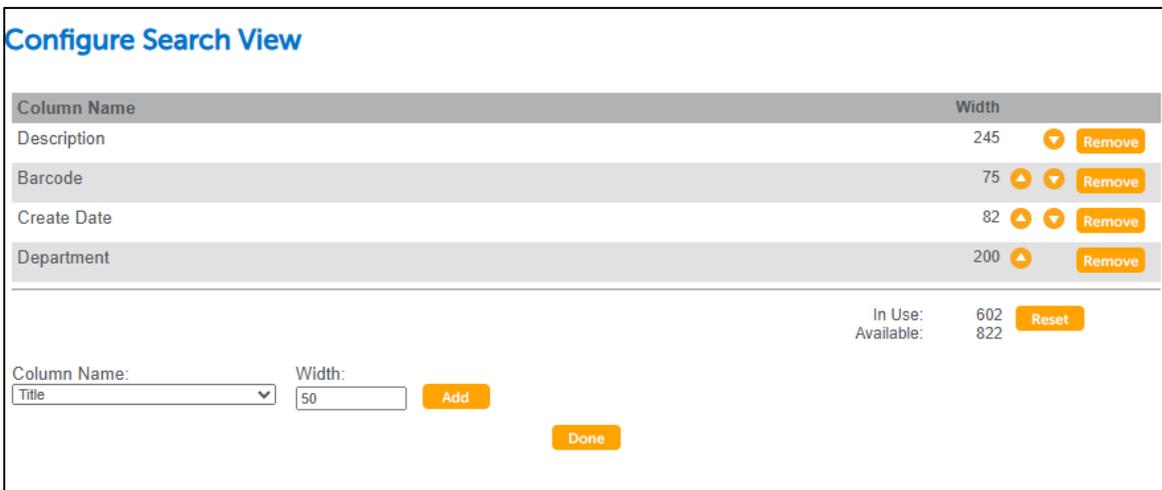


7. You can also configure reports to show specific fields. To configure your report, click on the Configure button on the Search Results page.



8. On the Configure Search View page, you have options to add fields to show on your report. You can click on the Remove button to remove the field from your report.

To add a field to your report, you select an option from the “Column Name” drop-down menu. You’ll also need to select the number of characters (width) to show in your report. Report fields are limited to 822 characters per report. On the bottom, right-side of the screen, it will show the total number of characters in use and how much you have available to use. The available number of characters will always show as 822, it won’t update as you add characters.



If you’re not sure what fields to include, we recommend the following.

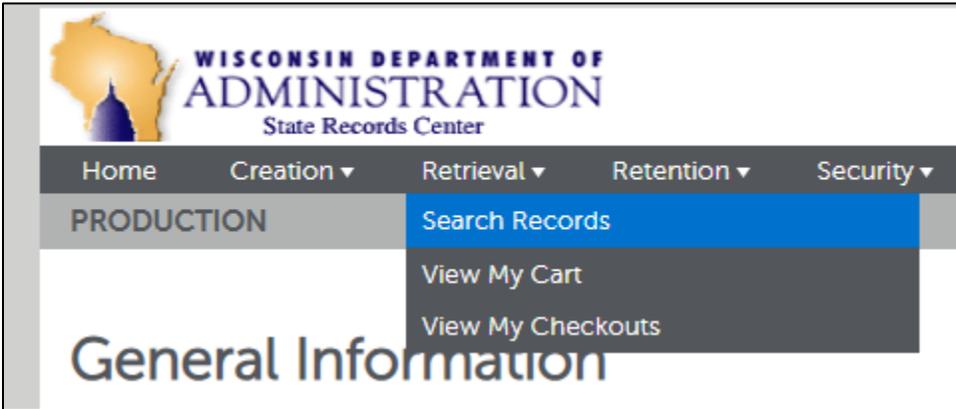
- Description – 100 width
- SRC Box Number – 50 width
- User Box Number – 50 width
- From Date – 50 width
- To Date – 50 width
- Record Series ID – 50 width
- Records Series – 50 width
- Submitted By – 100 width

Once you’ve selected your fields, click on the Done button.

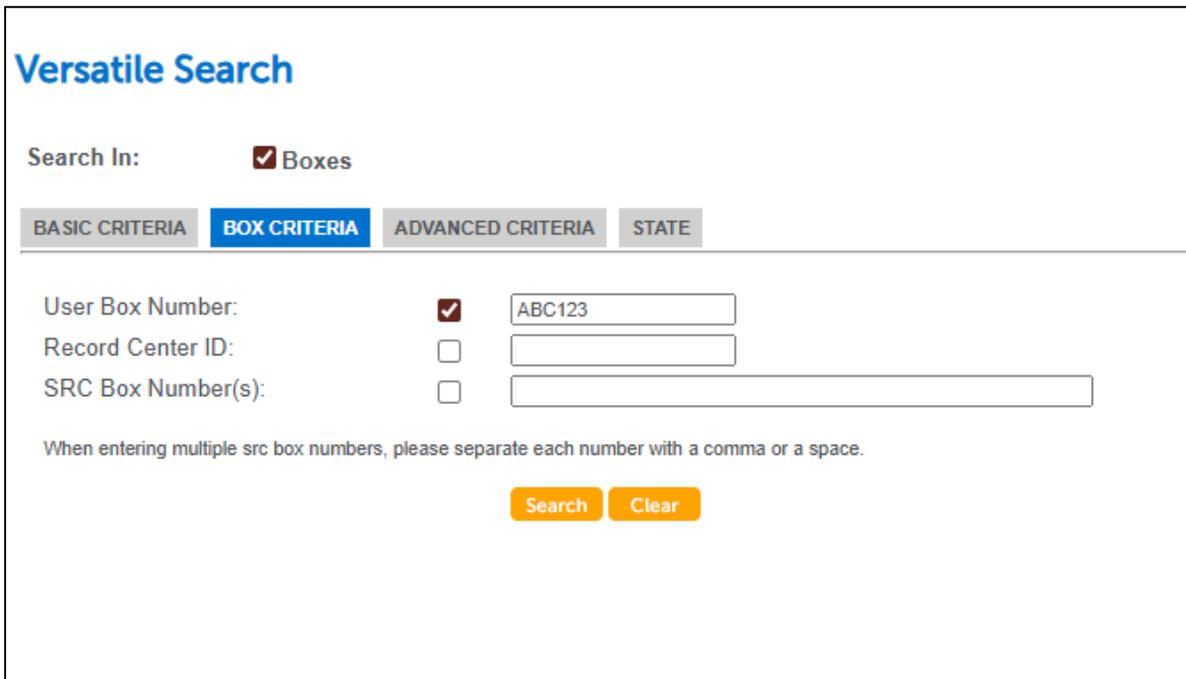
Searching for and Viewing Individual Boxes in Versatile

If you want to search for a single box, you will need either the user box number or the State Records Center box number (barcode). Use the following steps to search.

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



2. In the "Versatile Search" page, click on the "Box Criteria" tab. Enter your user box number or the State Records Center (SRC) box number into the respective search fields and then click on the check box next to the field. You only need the user box number or the SRC box number – you do not need both. After you enter your numbers, click search and you'll be taken to the detailed box description for that box.



The screenshot shows the 'Versatile Search' page. The 'Search In:' section has a checked checkbox for 'Boxes'. Below this are four tabs: 'BASIC CRITERIA', 'BOX CRITERIA' (selected), 'ADVANCED CRITERIA', and 'STATE'. Under the 'BOX CRITERIA' tab, there are three search fields: 'User Box Number' with a checked checkbox and a text input containing 'ABC123'; 'Record Center ID' with an unchecked checkbox and an empty text input; and 'SRC Box Number(s)' with an unchecked checkbox and an empty text input. A note below the fields reads: 'When entering multiple src box numbers, please separate each number with a comma or a space.' At the bottom are 'Search' and 'Clear' buttons.



Viewing Destroyed Boxes (Inventory)

If you want to view boxes that have been previously destroyed from your department's inventory at the State Records Center, use the following 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.

WISCONSIN DEPARTMENT OF ADMINISTRATION
State Records Center

Versatile

Home Utility Help Login

PRODUCTION

Versatile Web Login Page

This page provides access to Versatile Web. Please input your User ID and Password below.

Company: 285A-UW MADISON

User Name:

Password:

Login

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

WISCONSIN DEPARTMENT OF ADMINISTRATION
State Records Center

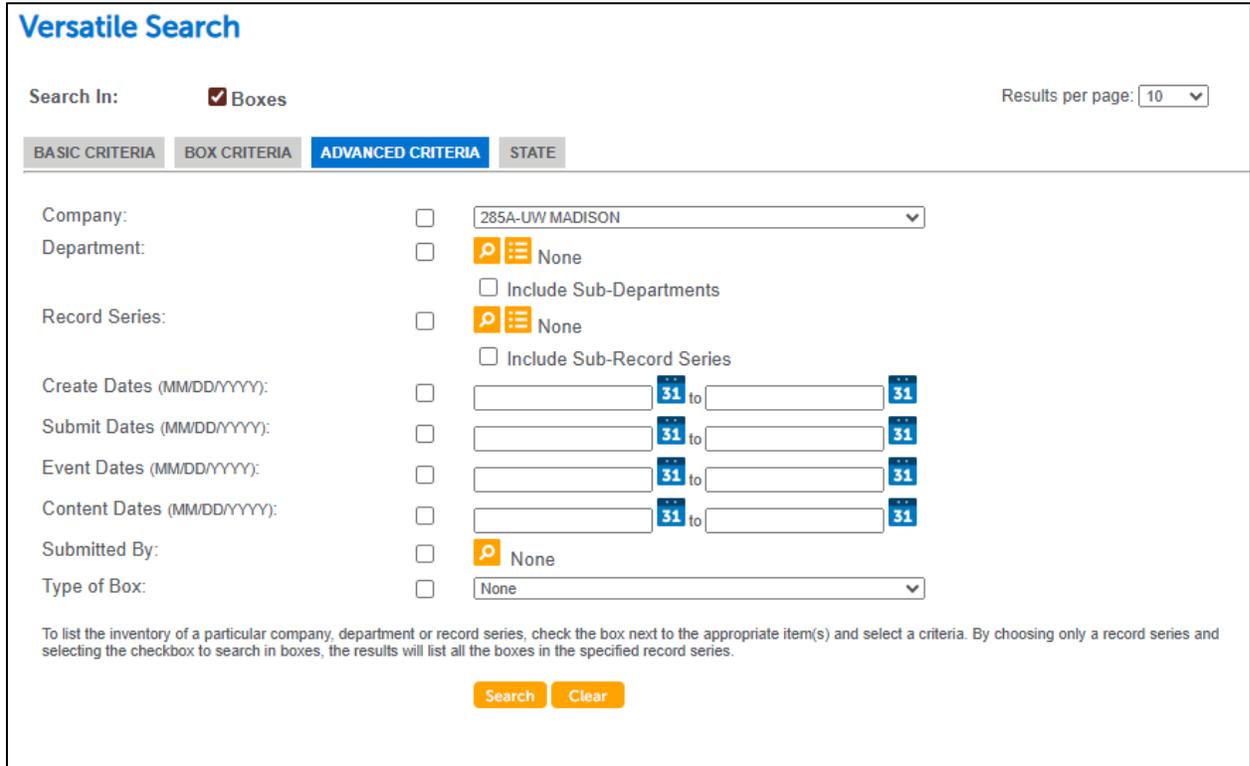
Home Creation Retrieval Retention Security

PRODUCTION

Search Records
View My Cart
View My Checkouts

General Information

- 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

Record Series:   None

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

Include Sub-Departments

Include Sub-Record Series

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.

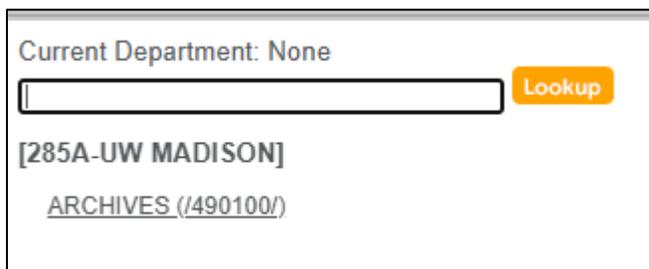
Search **Clear**

- 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

Lookup

[285A-UW MADISON]

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5. Once you've selected your department, click on the State tab. Select "Destroyed" as the Box State and click on the Search button. This will display a list of boxes that have been destroyed.

The screenshot shows the 'Versatile Search' interface. At the top left, it says 'Versatile Search'. Below that, 'Search In:' is followed by a checked box for 'Boxes'. To the right, 'Results per page:' is set to '10'. There are four tabs: 'BASIC CRITERIA', 'BOX CRITERIA', 'ADVANCED CRITERIA', and 'STATE' (which is highlighted in blue). Under the 'STATE' tab, there is a 'Box State:' label. To its right is a dropdown menu with three options: 'Active', 'Inactive', and 'Destroyed' (which is selected). To the right of the dropdown is a yellow 'Select All' button. Below the dropdown, there is a note: 'Hold the Ctrl key down to select more than one option in a list.' At the bottom of the form are two yellow buttons: 'Search' and 'Clear'.

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.