

State Records Center

Entering New Inventory

WISCONSIN DEPARTMENT OF ADMINISTRATION
State Records Center

Home Utility Help Login

Special Updates

You will notice that this web application now has a new look as well as new features. Some of the

- "Request Pickup" - Function updated to allow you to send an email requesting the pickup of records are new for storage, returning orders, or to be destroyed (there is a charge for destroy boxes)
- "My File Requests" - A new function which allows users that submit only new indexed file requests to view new file submissions.
- "Search Boxes/Files" - Function updated to allow searching based on the creation, event, or location of records.
- "Search Results" - Function updated to allow users to print or email their search results.

General Information

For questions regarding State Records Center (SRC) operations, including rates, approved storage options, go to the [SRC website](#).

Only SRC approved cartons/boxes can be used for records storage. We will not accept any other cartons/boxes. Our drivers will refuse pickup of anything else and you may be charged an extra trip charge.

To order approved storage cartons/boxes review the Fact Sheet "Records Center Storage Boxes" listed above.

If you have any questions on this site, the features of this program or any of the following webpage contact us at 608-2995-2995.

[CLICK TO LOGIN](#)

- Versatile web address:
<http://vssweb.wi.gov>
- Look for any new 'Special Updates' each time you login to the site.
- Read the '**General Information**' carefully before proceeding.
- Use the **SRC website** link to answer general questions related to the State Records Center.
- Click "**Click to Login**" to launch the login screen.

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Versatile Enterprise

Home Utility Help Login

Versatile Web Login Page

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

Company: 505-ADMINISTRATION

User Name: 505-334-EGKA

Password: *****

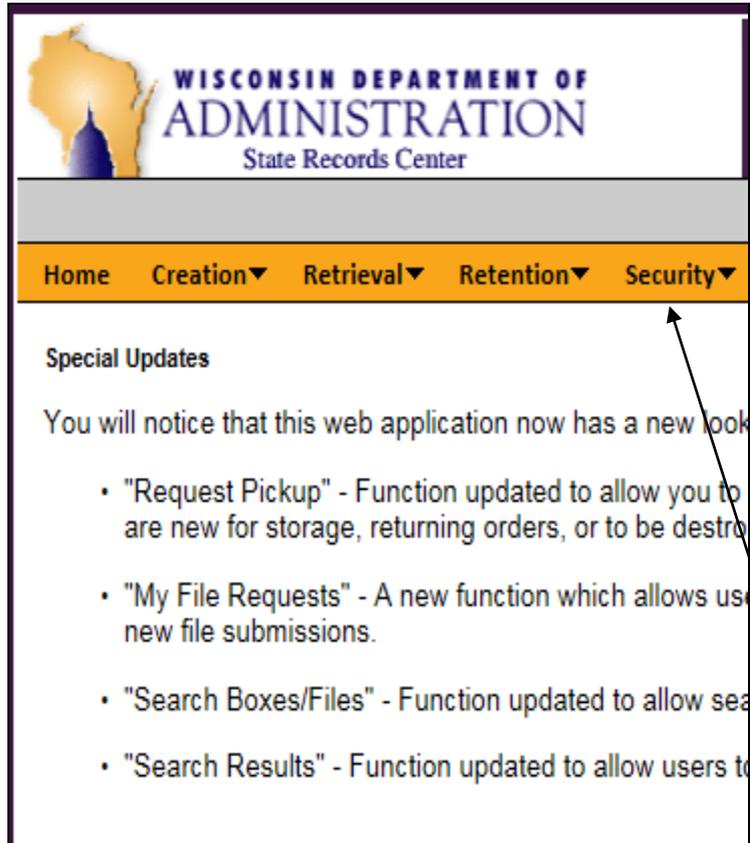
LOGIN

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- Use the drop down arrow next to **'Company'** to choose your agency.
- In the **'User Name'** section fill in the SRC User ID you were assigned.
- In the **'Password'** section fill in the password you were given.
- If you get a login error, check the company box. The company chosen should be your agency, not WIS State Records Center.
- DO NOT give your User Name and password to anyone else as it is unique to you. You will be responsible for anything done when your User Name is logged in.
- Contact your agency Record Officer if your name, address, or phone number changes.

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- Main Screen Tabs allow you navigate the website easily and quickly.
- **Home:** Special Updates, General Information, and the SRC website link.
- **Creation:** Request labels for new inventory that will be sent to the SRC. You can also review the status of your pending requests.
- **Retrieval:** Search, order (boxes and indexed files), and request pickup of existing inventory. Print a list of your existing inventory at any time.
- **Retention:** Descriptions of all Records Disposition Authorization's (RDA's) you are authorized to use.
- **Security:** Change your password using this tab the first time you login and as needed.

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Retention Schedule

GLOBAL 115-AGRICULTURE, TRADE & CONSUMER PROTECTION AGRICULTURAL RESOURCE (400)

Record Series Title	FINANCIAL DEFAULT CASE FILES
Record Series ID	00053000
Active Retention:	
Inactive Retention:	EVT+15
Open Date:	01/01/1978
Close Date:	
Event Date:	11/30/2021
Description:	DAIRY PLANT SECURITY AND FOOD CONTRACTOR SECURITY DEFAULT CASE FILES. THESE FILES MAY INCLUDE COMMERCIAL SURETY BONDS, OTHER ASSIGNED SECURITY FINANCIAL STATEMENTS AND TRUSTEESHIP RECORDS FOR DAIRY PLANTS OR FOOD CONTRACTORS WHO HAVE FAILED LEAVING UNPAID OBLIGATIONS TO MILK PRODUCERS OR WISCONSIN GROWERS. THESE FILES WOULD ALSO CONTAIN AUDIT RECORDS USED TO DETERMINE CLAIMS OF PRODUCERS OF GROWERS, COLLECTIONS OF SECURITY, HEARINGS ALLOWING CLAIMS, DISTRIBUTION OF MONIES AVAILABLE TO CLAIMANTS AND RELATED MATERIAL. THE FINANCIAL STATEMENTS INCLUDED IN THESE RECORDS ARE CONFIDENTIAL AND NOT SUBJECT TO PUBLIC INSPECTION UNDER S. 100.03(5)(F), WIS. STATS., AND ARE SUBJECT TO EXPOSURE ONLY IF IT BECOMES NECESSARY AS PART OF A DEFAULT OR ENFORCEMENT ACTION. YEAR CREATED: 1978 CONFIDENTIAL: S. 100.03(5)(F), WIS. STATS. ARRANGED: FIRST BY LICENSE GROUP, ADN THEN BY CASE FILE. ANNUAL ACCUMULATION VARIES FROM YEAR TO YEAR - MOST YEARS ZERO ACCUMULATION, OTHER YEARS 5 OR 6 CUBIC FEET. USED BY: BUSINESS TRADE PRACTICES AND AGENCY LEGAL STAFF FOR DEFAULT PROCEEDINGS. EVT: 15 YEARS FROM THE DATE CASE IS FINALIZED AND DESTROY

- Before you enter a box creation request review your RDA's under the '**Retention**' tab. You can only view RDA's your Record Officer authorized for your use when they requested your access.
- RDA's may be at one of three levels. You can switch levels by clicking the '**GO**' icon next to each one.
- The three levels are: Global, which are statewide; Company, which are agency wide; and Departmental, which are specific to one department only.
- Make a note of the RDA title, number, and level (global, company, or departmental) to aide you during the data entry process.
- Read the entire description of the RDA. If the retention is **event** based (EVT), the description will tell you the event definition. The listed event determines what date should be entered in the Event Date box during the data entry process.
- If you need additional guidance on choosing the appropriate RDA, contact your agency Record Officer.

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The screenshot shows the 'Box Creation Page' in the State Records Center. The page has a navigation bar with 'Home', 'Creation', 'Retrieval', 'Retention', 'Security', 'Utility', 'Help', and 'Logout'. The 'Creation' tab is active. The form includes the following fields:

- Company:** A dropdown menu with '505-ADMINISTRATION' selected.
- Department:** A dropdown menu with 'RECORDS MANAGEMENT-ENTERPRISE OPERATIONS (13347)' selected. A list icon is visible to the left of the text.
- Record Series:** A dropdown menu with 'DESTRUCTION AND TRANSFER LISTINGS (00075000.)' selected. A list icon is visible to the left of the text.
- User Box Number:** A text input field.
- Type of Box:** A dropdown menu with 'None' selected.
- From Date (MM/DD/YYYY):** A date input field with '10/15/2015' and a calendar icon.
- To Date (MM/DD/YYYY):** A date input field with '10/15/2015' and a calendar icon.
- Event Date (MM/DD/YYYY):** A date input field with a calendar icon.
- Description:** A large text area.

At the bottom of the form are buttons for 'ADD FILES', 'SUBMIT BOX', 'SAVE AS DRAFT', and 'CLEAR', along with a 'Help?' link. A footer section contains a table with columns 'File Action', 'From Date', 'To Date', and 'Description', and a note '0 file(s) in box'.

Annotations with arrows point to the 'Company' dropdown, the 'Department' dropdown, the 'Record Series' dropdown, and the 'Description' text area.

- To enter new inventory requests choose the **'Creation'** tab, then select **'Box Creation Request'** from the drop down list.

Your **'Company'** should already be selected. If not, use the drop down box to select your appropriate company.

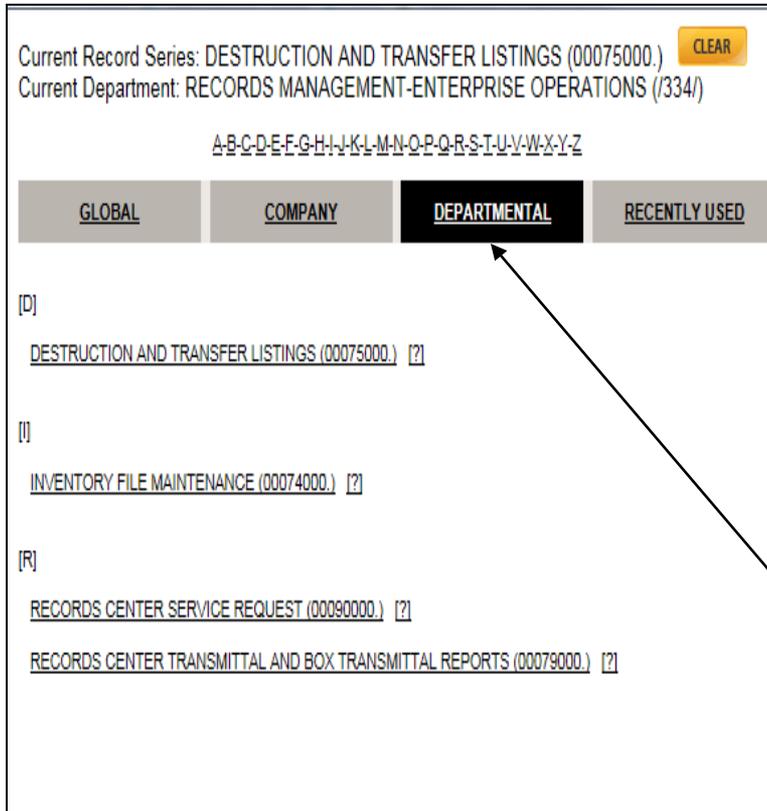
Next, if necessary, select your **'Department'**. Click on the  icon to open a pop up window that will allow you to change the department.

Then, select the **'Record Series'** you decided to use while reviewing your RDA's earlier. Again, you can click on the  icon to open a pop up window that will allow you to choose a specific RDA.

- See next slide for pop up window example.

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Current Record Series: DESTRUCTION AND TRANSFER LISTINGS (00075000.) CLEAR
Current Department: RECORDS MANAGEMENT-ENTERPRISE OPERATIONS (/334/)

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

GLOBAL COMPANY **DEPARTMENTAL** RECENTLY USED

[D]
DESTRUCTION AND TRANSFER LISTINGS (00075000.) [?]

[I]
INVENTORY FILE MAINTENANCE (00074000.) [?]

[R]
RECORDS CENTER SERVICE REQUEST (00090000.) [?]
RECORDS CENTER TRANSMITTAL AND BOX TRANSMITTAL REPORTS (00079000.) [?]

- Departments and RDA's are listed in alphabetical order by title in the pop up windows. Their corresponding numbers are noted after the title in parenthesis.
- The tabs across the top of the RDA window correspond to the three levels you saw in the Retention section previously.
- There is an additional tab in this window of 'Recently Used.' These RDA's are ones you used the last time you entered box requests.
- You can change tabs by clicking on the appropriate level name.
- To select the department or RDA you want, click on it once.

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Home Creation Retrieval Retention Security Utility Help Logout

Box Creation Page

Company: * 505-ADMINISTRATION

Department: * RECORDS MANAGEMENT-ENTERPRISE OPERATIONS

Record Series: * DESTRUCTION AND TRANSFER LISTINGS (000750)

User Box Number: * TEST 1

Type of Box: * A-FULL SIZE BOXES

From Date (MM/DD/YYYY): * 01/01/2007

To Date (MM/DD/YYYY): * 12/31/2007

Event Date (MM/DD/YYYY): * 03/15/2015

Description: * TRAINING BOX 1 - LEAPFROG THRU HOPTOAD
CASE NUMBERS 400 THRU 592
DIVISION 156
LEAPFROG
BULLFROG
CROAKER
HOPTOAD

ADD FILES SUBMIT BOX SAVE AS DRAFT CLEAR Help?

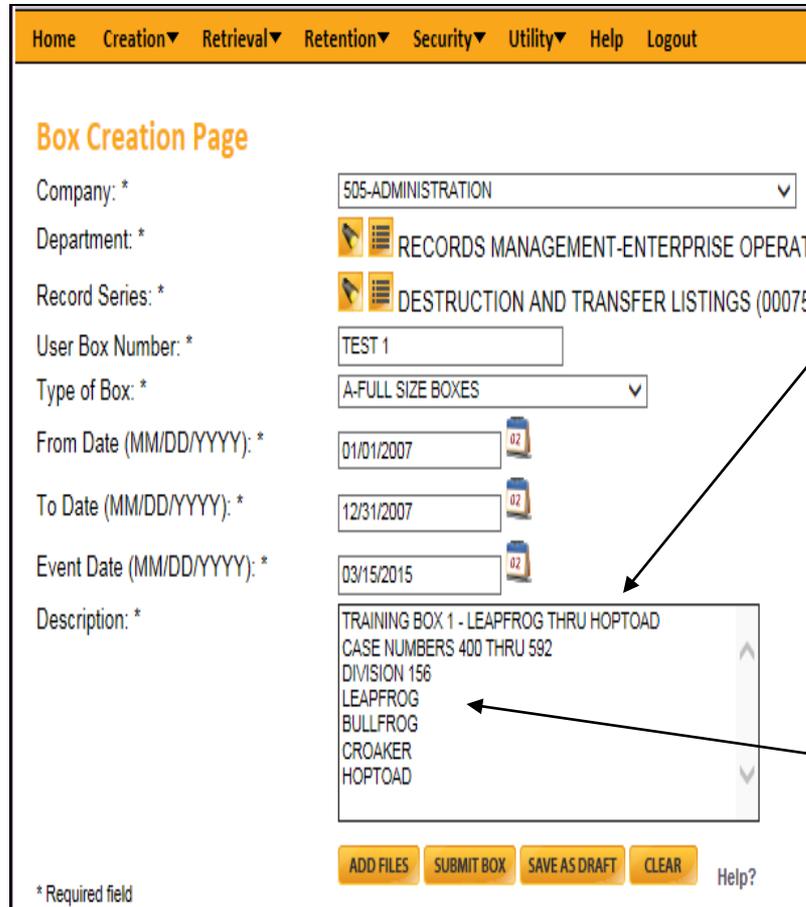
* Required field

Fill in the **REQUIRED** box information fields: User Box Number, Type of Box, From Date, To Date, Event Date, and Description.

- **User Box Number:** This number is assigned by each agency in a different way. You may need to check with your agency Record Officer for the numbering strategy your agency uses.
- **Type of Box:** The standard box type is 'A-Full Size Box'.
- **From/To Dates:** These are the oldest and newest dates of the files that you have in the box.
- **Event Date:** Often times this date is the same as the 'To Date', but not always. The Event date is decided by the event that was specified in the RDA you reviewed and selected earlier.

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The screenshot shows the 'Box Creation Page' with the following fields and values:

- Home Creation Retrieval Retention Security Utility Help Logout
- Company: * 505-ADMINISTRATION
- Department: * RECORDS MANAGEMENT-ENTERPRISE OPERATIONS
- Record Series: * DESTRUCTION AND TRANSFER LISTINGS (000750)
- User Box Number: * TEST 1
- Type of Box: * A-FULL SIZE BOXES
- From Date (MM/DD/YYYY): * 01/01/2007
- To Date (MM/DD/YYYY): * 12/31/2007
- Event Date (MM/DD/YYYY): * 03/15/2015
- Description: * TRAINING BOX 1 - LEAPFROG THRU HOPTOAD
CASE NUMBERS 400 THRU 592
DIVISION 156
LEAPFROG
BULLFROG
CROAKER
HOPTOAD

Buttons at the bottom: ADD FILES, SUBMIT BOX, SAVE AS DRAFT, CLEAR, Help?

* Required field

- The description field is unlimited in space and is full text keyword searchable.
- Use the first 30 characters to give an overall box content description. This will make inventory evaluation easier.
- Once you've entered the overall description you can list descriptors for each file contained in the box. This makes searching for specific files easier.
- The key to a good description is to be extremely specific and very detailed.

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The screenshot shows the 'Box Creation Page' in the State Records Center. The page has a navigation bar with links: Home, Creation, Retrieval, Retention, Security, Utility, Help, and Logout. The form includes the following fields:

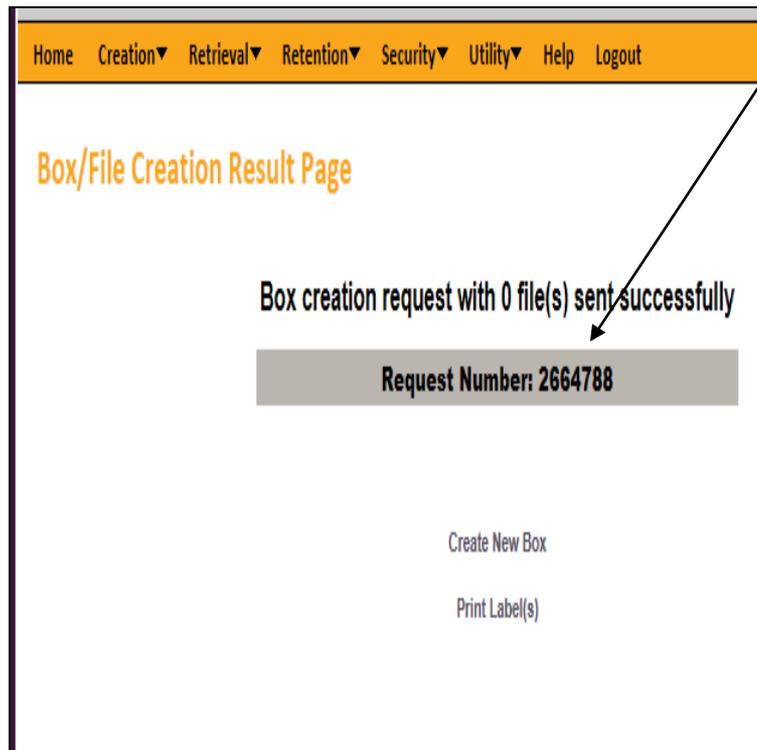
- Company: * (Dropdown menu: 505-ADMINISTRATION)
- Department: * (Dropdown menu: RECORDS MANAGEMENT-ENTERPRISE OPERAT)
- Record Series: * (Dropdown menu: DESTRUCTION AND TRANSFER LISTINGS (000750)
- User Box Number: * (Text input: TEST 1)
- Type of Box: * (Dropdown menu: A-FULL SIZE BOXES)
- From Date (MM/DD/YYYY): * (Text input: 01/01/2007)
- To Date (MM/DD/YYYY): * (Text input: 12/31/2007)
- Event Date (MM/DD/YYYY): * (Text input: 03/15/2015)
- Description: * (Text area: TRAINING BOX 1 - LEAPFROG THRU HOPTOAD
CASE NUMBERS 400 THRU 592
DIVISION 156
LEAPFROG
BULLFROG
CROAKER
HOPTOAD)

At the bottom of the form, there are four buttons: ADD FILES, SUBMIT BOX, SAVE AS DRAFT, and CLEAR. A 'Help?' link is also present. A note at the bottom left states '* Required field'.

- Whatever you type in the description should be the same information you write on the box itself.
- **REVIEW** your entries carefully and make any updates needed before you go any further. There is no 'oops' button if you make a mistake!
- When you have verified all the information for this box is correct, you can click '**Submit Box**'.
- Do not click this more than once because you will create duplicate label requests.

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You will receive a request number for each box creation request you submit. You do not need to write these down. You will be able to see them when you review your pending requests (see next page).

- If you have more boxes to submit, click '**Create New Box**'. All of the previous box information will automatically populate. Only change the fields you need to for the next box. Don't forget the User Box number.
- When you are done entering requests for all of your boxes you can review your pending requests or log out.

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The screenshot shows the State Records Center web application interface. At the top is a navigation bar with the following menu items: Home, Creation, Retrieval, Retention, Security, Utility, Help, and Logout. A dropdown menu is open under 'Creation', listing: Box Creation Request, File Creation Request, My Box Requests, and My File Requests. Below the navigation bar, there are search filters: 'Requested Date' with a date range from 01/08/2016 to 01/16/2016, a 'Status' dropdown set to 'Complete', and a 'Label Printed?' dropdown set to 'All'. A yellow 'REFRESH' button is located to the right of the search filters. Below the filters is a table header with columns: Request Number, Box Number, User Box Number, Label Printed?, Request Date, and Department. The table content shows 'No box creation requests to display'.

To review your pending box creation requests click the **'Creation'** tab. Then click **'My Box Requests.'**

- Next, in the center of the screen use the drop down arrow to change the status from 'complete' to **'ALL'**.
- Then, click **'Refresh'** on the right side of the screen.
- You will be able to review your requests, but you cannot change or edit them. If you have any corrections, email the SRC general mailbox at doadeorecordscenter@wisconsin.gov. Make sure to include the creation request number and the specific correction.
- Requests are processed daily. If you see a number in the SRC Box Number column, you need to contact your agency Record Officer before any changes can be made.



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- Congrats! You have completed the process for entering new inventory.
- Now what? Wait.
- The requests will be processed, labels generated, and sent to you via inter-departmental mail.
- The label packet will include instructions on your next steps, requesting pickup, and the Inventory Transmittal form.