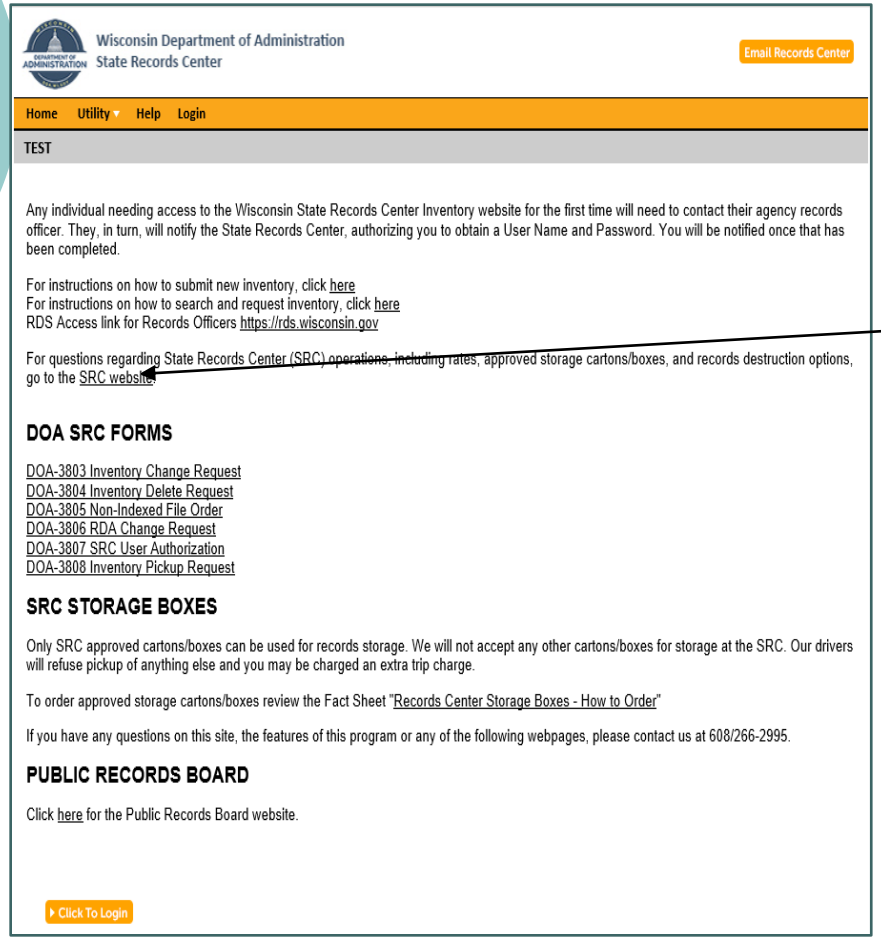
State Records Center

Entering New Inventory



- Versatile web address: https://vssweb.wi.gov
- Use the **SRC website** link to answer general questions related to the State Records Center.
- Home page has useful links to the Versatile web trainings and SRC forms.
- Click "**Click to Login**" to launch the login screen.

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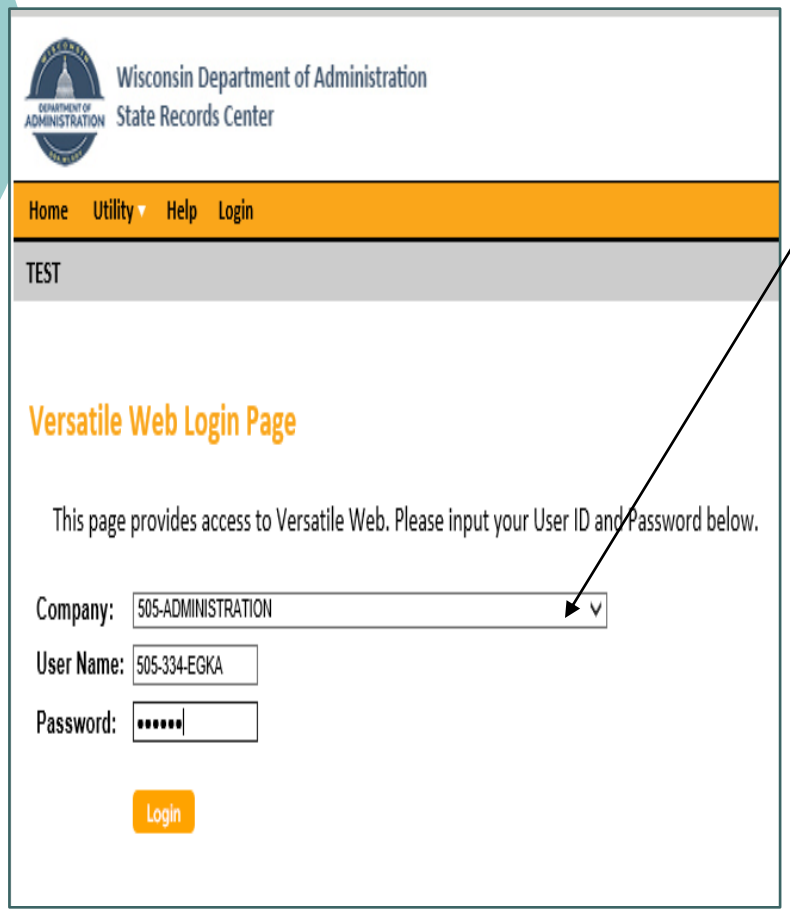

- Use the drop down arrow next to **'Company'** to choose your agency.
- In the **'User Name'** section fill in the SRC User ID you were assigned.
- In the **'Password'** section fill in the password you were given.
- If you get a login error, check the company box. The company chosen should be your agency, not WIS State Records Center.

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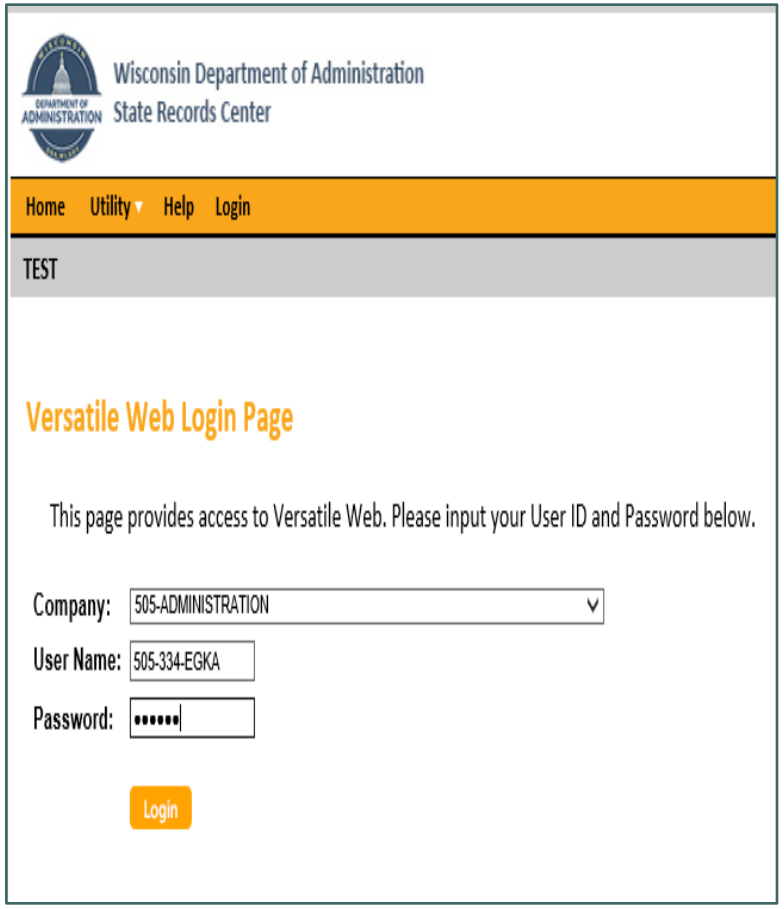

- **DO NOT** give your User Name and password to anyone else as it is unique to you. You will be responsible for anything done when your User Name is logged in.
- Contact your agency Records Officer if your name, desk/office, address, or phone number changes.

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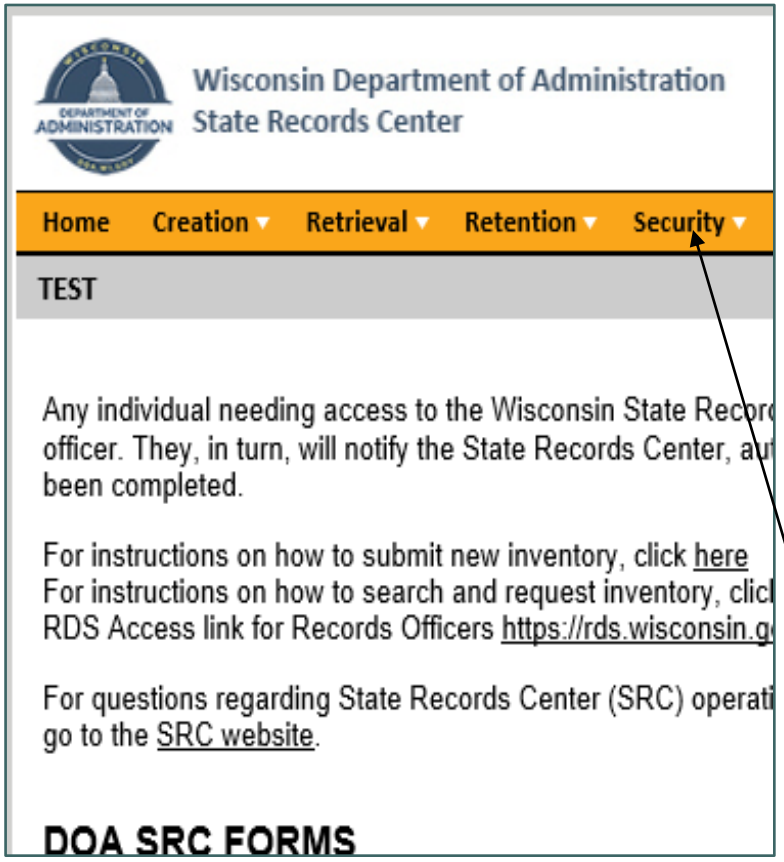

- **Home**: Special Updates, General Information, and the SRC website link.
- **Creation**: Request labels for new inventory that will be sent to the SRC. You can also review the status of your pending requests.
- **Retrieval**: Search, order (boxes and indexed files), and request pickup of existing 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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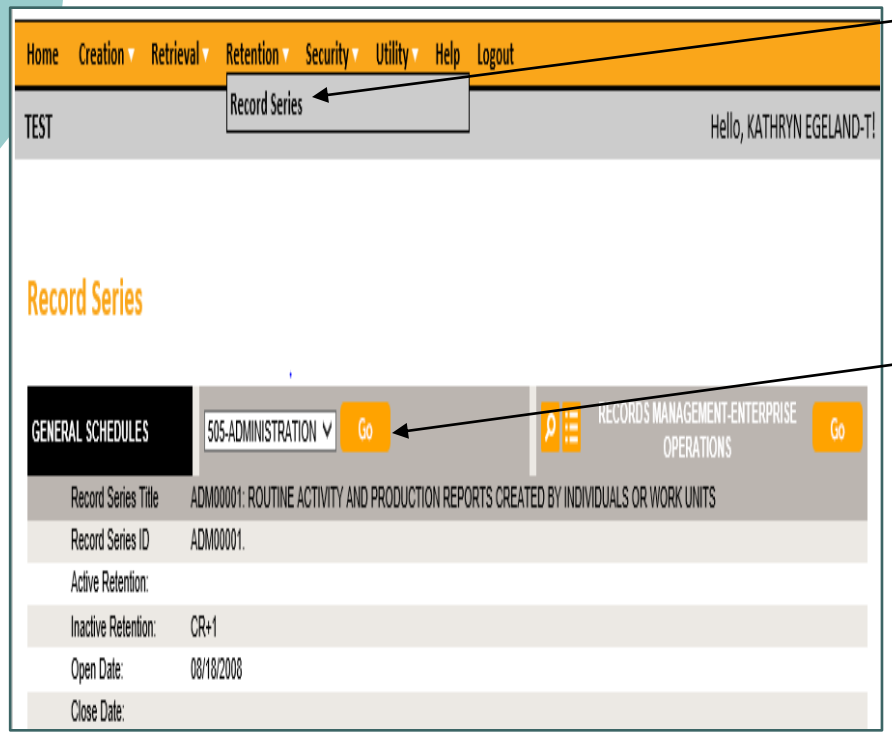

- Before you enter a box creation request review your RDA's.
  - Click the **'Retention'** tab
  - Then click Record Series
- You can only view RDA's your Record Officer authorized for your use when they requested your access.
- RDA's may be at one of three levels. You can switch levels by clicking the **'GO'** icon next to each one.
- The three levels are:
  - General Schedules – Statewide availability for anyone to choose from
  - Company – Agency wide availability for anyone in that agency to choose
  - Departmental – Program / business unit availability for your specific program / business unit only

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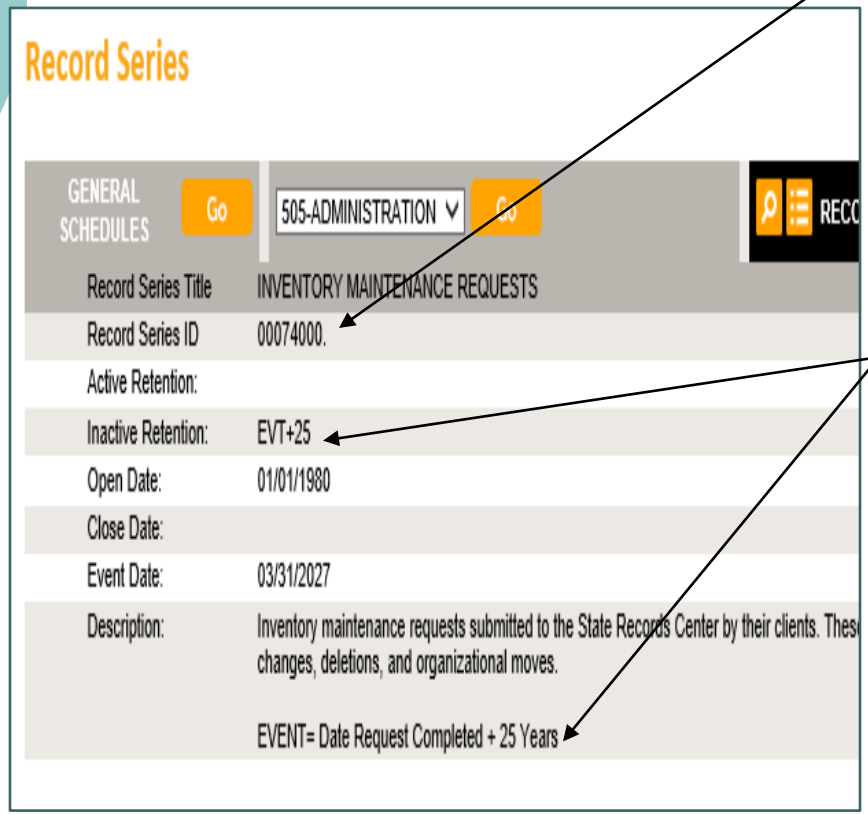

- Make a note of the RDA title, number, and level (global, company, or departmental) to aide you during the data entry process.
- Read the entire description of the RDA.
- If the retention is **event** based (EVT), the description will tell you the event definition. The listed event determines what date 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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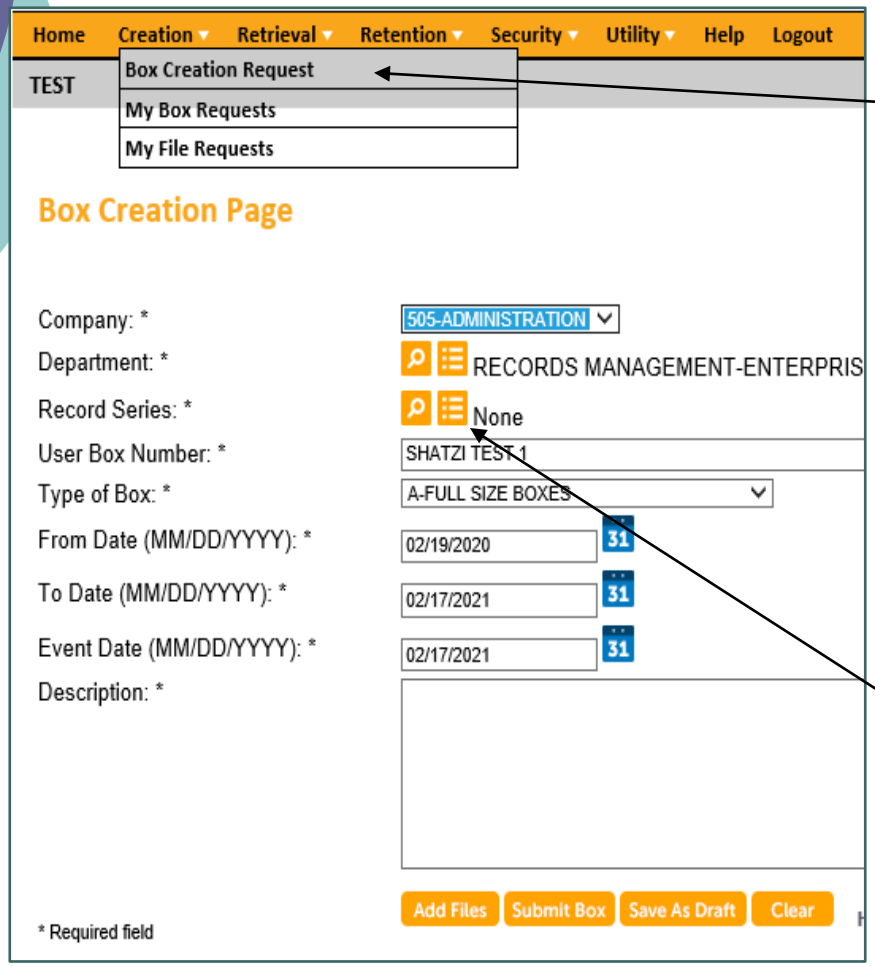

- To enter new inventory requests choose the **'Creation'** tab, then select **'Box Creation Request'** from the drop down list.
- Your **'Company'** should already be selected. If not, use the drop down box to select your appropriate company.
- Next, if necessary, select your **'Department'**. Click 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.

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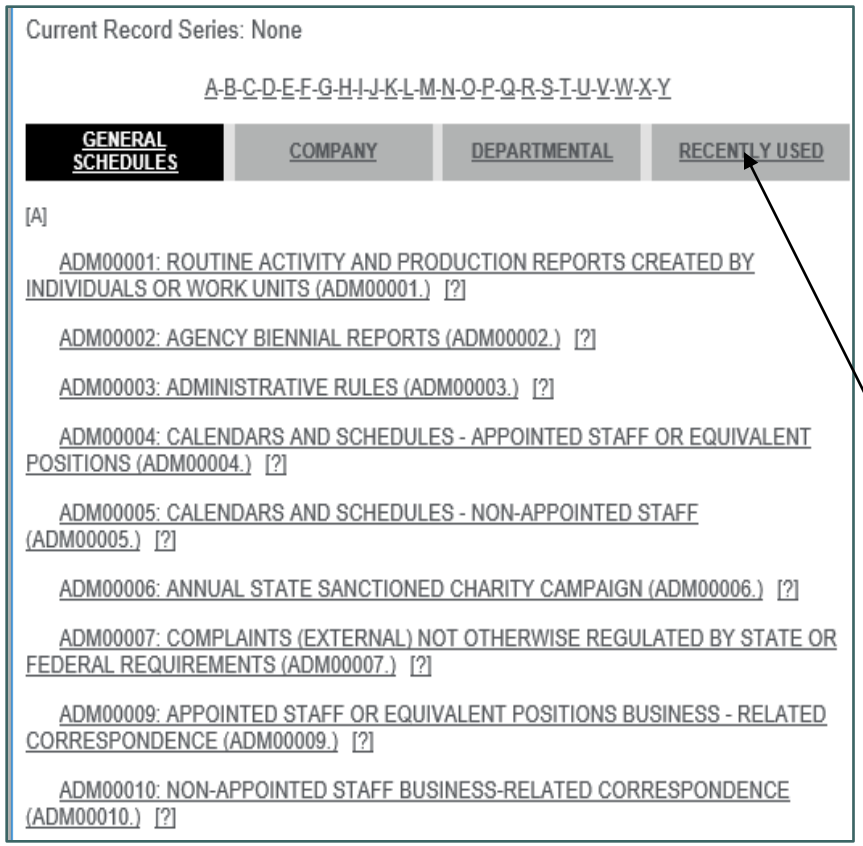

- Departments and RDA's are listed in alphabetical order by title in the pop up windows. Their corresponding numbers are noted after the title in parenthesis.
- The tabs across the top of the RDA window correspond to the three levels you saw in the Retention section previously.
- There is an additional 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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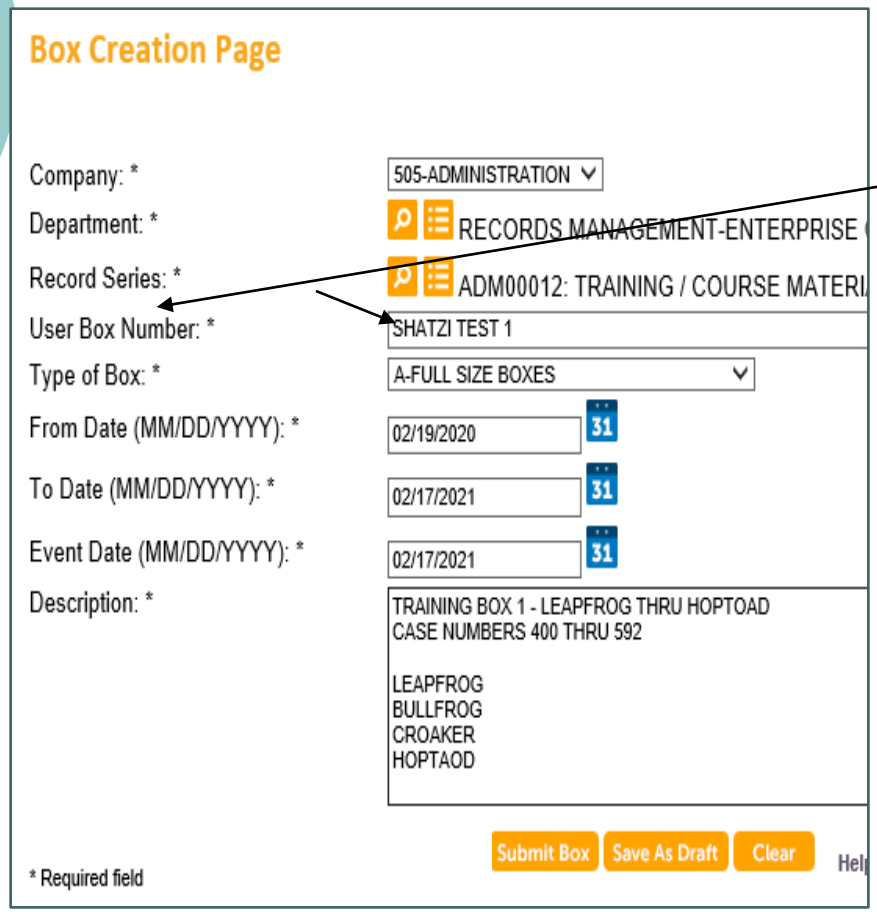

- Fill in the **REQUIRED** box information fields: User Box Number, Type of Box, From Date, To Date, Event Date, and Description.
- **User Box Number**: This number is assigned by each agency in a different way. You may need to check with your agency Record Officer for the numbering strategy your agency 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 in the box. From is the oldest file and To is the newest file.
- **Event Date**: Usually this is the same as the 'To Date', but not always. The Event date is determined by the event specified in the RDA you reviewed and selected earlier. It is NOT the disposition date.

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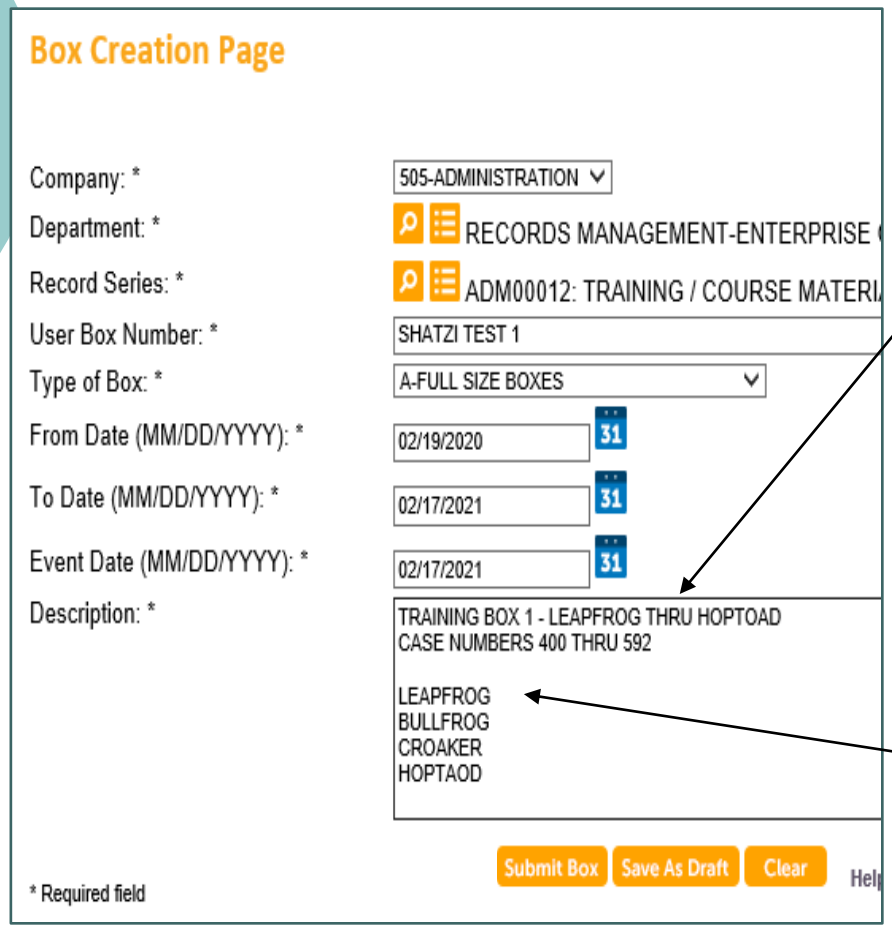

- The description field is unlimited in space and is full text keyword searchable.
- Use the first 30 characters to give an overall box content description. This will make inventory evaluation easier.
- Once you've entered the overall description list descriptors for each file contained in the box. This makes searching for specific files easier.
- The key to a good description is to be extremely specific and very detailed. Do not put personally identifiable information in the description.

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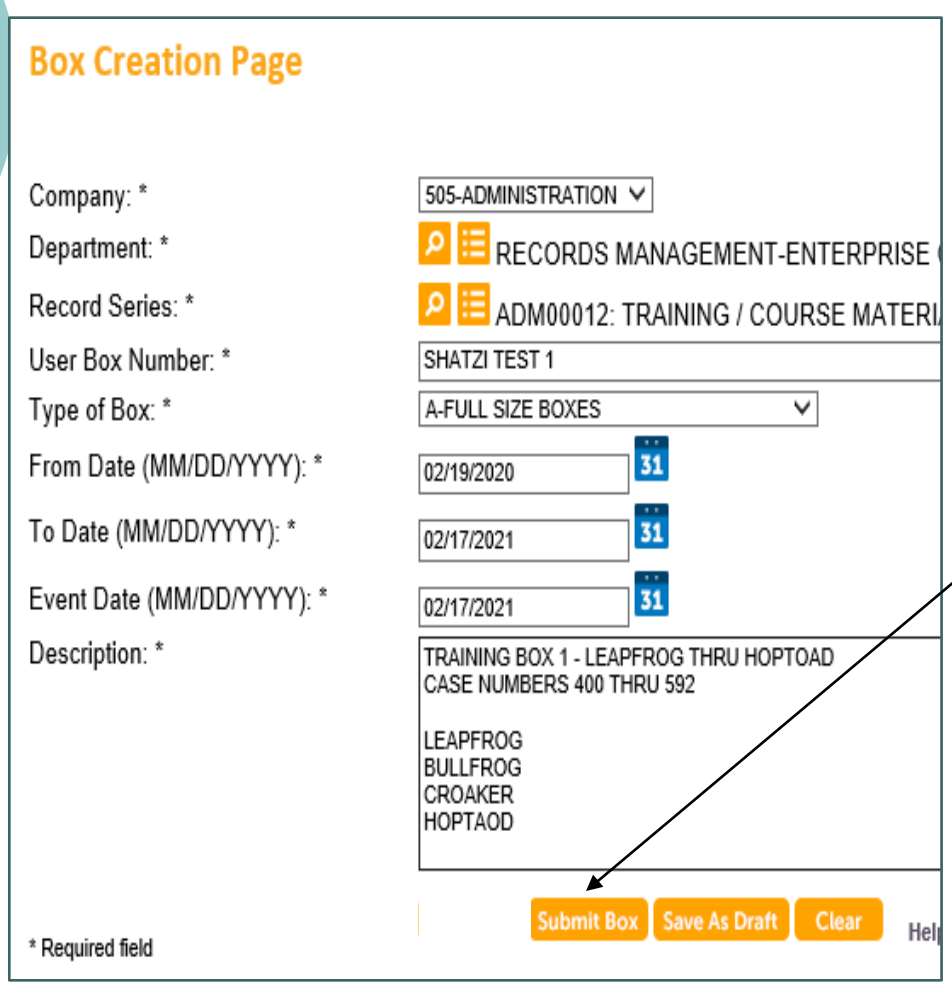

- Whatever you type in the description should be the same information you write on the box itself.
- **REVIEW** your entries carefully and make any updates needed before you go any further.
- When you have verified all the information for this box is correct, you can click **'Submit Box'.**
- Do not click this more than once because you will create duplicate label requests.

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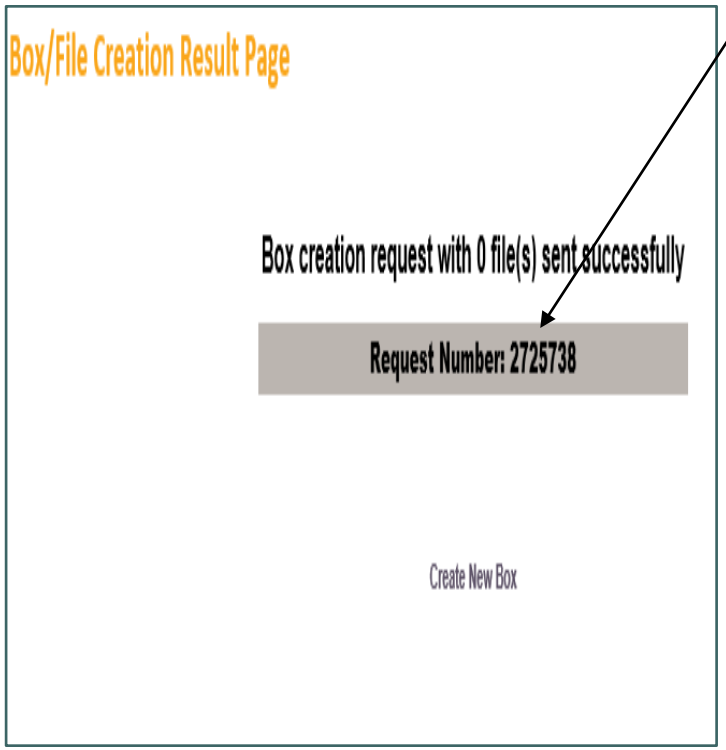

- You will receive a request number for each box creation request you submit. You do not need to write these down. You will be able to see them when you review your pending requests (see next page).
- If you have more boxes to submit, click '**Create New Box**'. All of the previous box information will 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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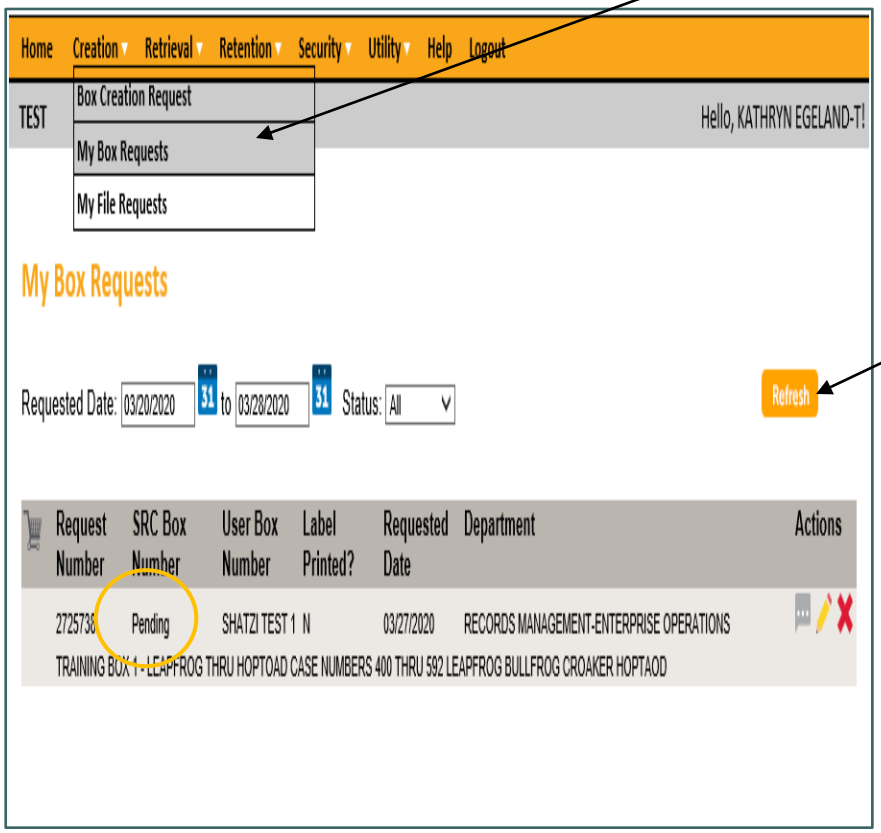

- To review your pending box creation requests click the **'Creation'** tab. Then click **'My Box Requests.'**
- Next, in the center of the screen use the drop down arrow to change the status from 'complete' to '**ALL'.**
- Then, click **'Refresh'** on the right side of the screen.
- You can edit or cancel your creation request under the '**Actions'** column if the request is still 'Pending'. Review your pending requests quickly because they are processed daily.
- If there is a number in the SRC Box Number column, contact your agency Records Officer to make changes.

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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.
- If you have any questions, email doadeorecordscenter@wisconsin.gov or call 608-266-2995.