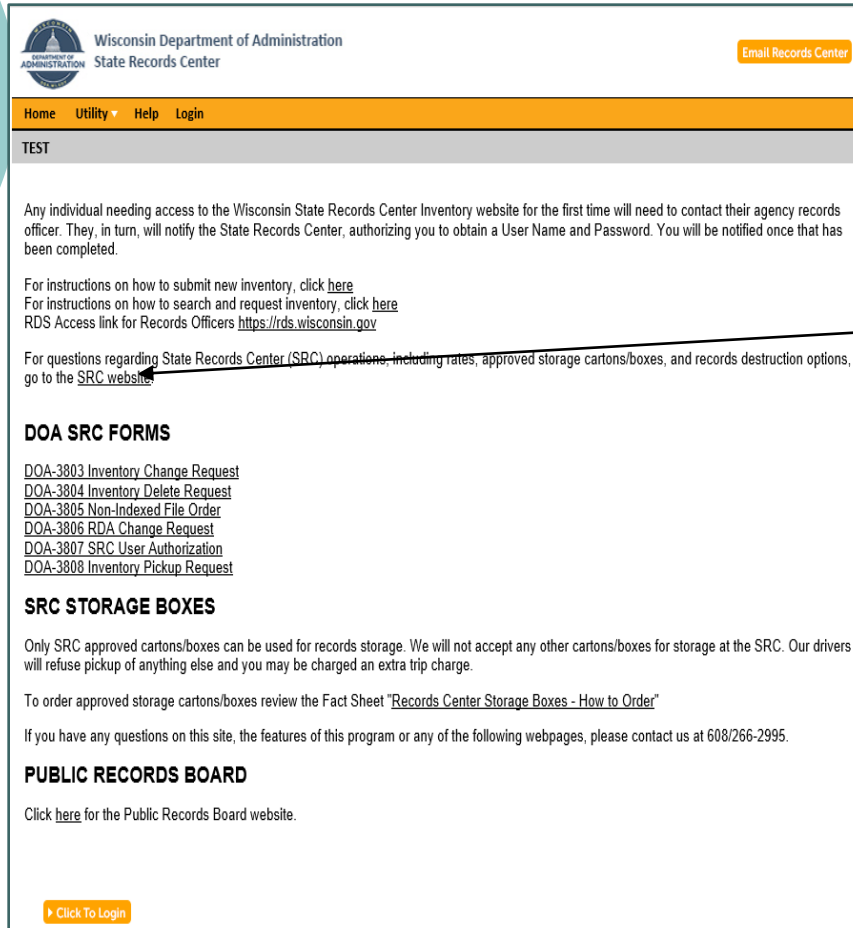


# State Records Center

## Entering New Inventory



The screenshot shows the homepage of the Wisconsin State Records Center. At the top left is the Wisconsin Department of Administration logo. To its right is the text "Wisconsin Department of Administration" and "State Records Center". In the top right corner, there is an orange button labeled "Email Records Center". Below the header is a navigation bar with links for "Home", "Utility", "Help", and "Login". The main content area starts with a "TEST" banner. Below this, there is a paragraph explaining that new users need to contact their agency records officer. This is followed by instructions on how to submit new inventory and search for inventory, with links to "here". A link for "RDS Access link for Records Officers" is provided as "https://rds.wisconsin.gov". A paragraph about State Records Center (SRC) operations follows, with a link to the "SRC website".

**DOA SRC FORMS**

- [DOA-3803 Inventory Change Request](#)
- [DOA-3804 Inventory Delete Request](#)
- [DOA-3805 Non-Indexed File Order](#)
- [DOA-3806 RDA Change Request](#)
- [DOA-3807 SRC User Authorization](#)
- [DOA-3808 Inventory Pickup Request](#)

**SRC STORAGE BOXES**

Only SRC approved cartons/boxes can be used for records storage. We will not accept any other cartons/boxes for storage at the SRC. 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 - How to Order](#)"

If you have any questions on this site, the features of this program or any of the following webpages, please contact us at 608/266-2995.

**PUBLIC RECORDS BOARD**

Click [here](#) for the Public Records Board website.

At the bottom left, there is an orange button labeled "Click To Login".

- 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.

# State Records Center

## Entering New Inventory

Wisconsin Department of Administration  
State Records Center

Home Utility ▾ Help Login

TEST

### 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

- 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.

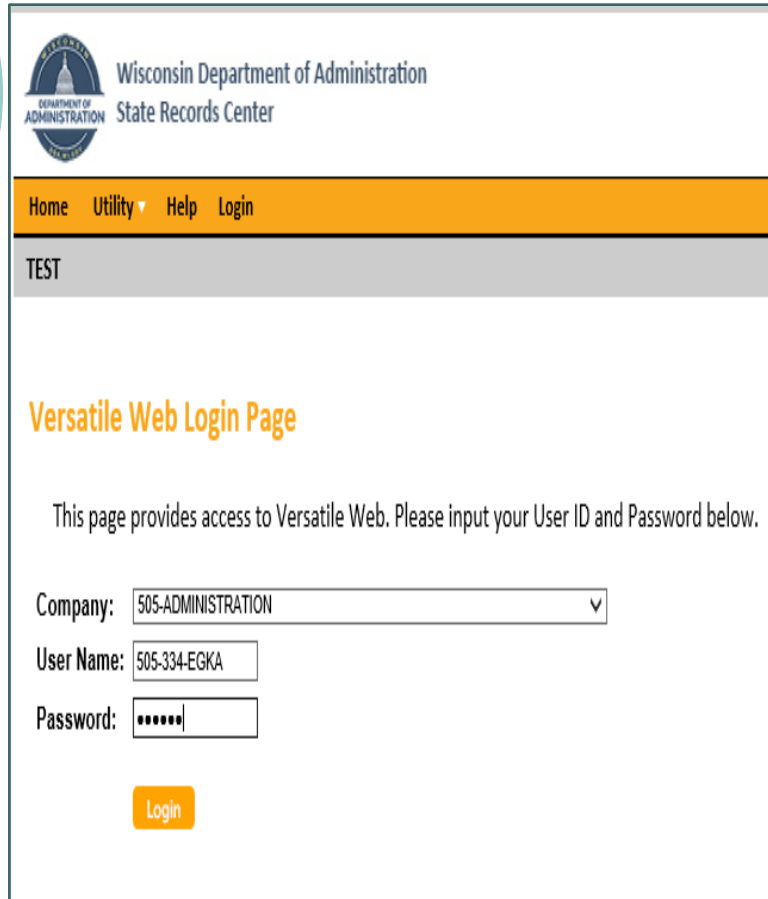
- In the '**Password**' section fill in the password you were given.

- If you get a login error, check the company box. The company chosen should be your agency, not WIS State Records Center.

# State Records Center

## Entering New Inventory

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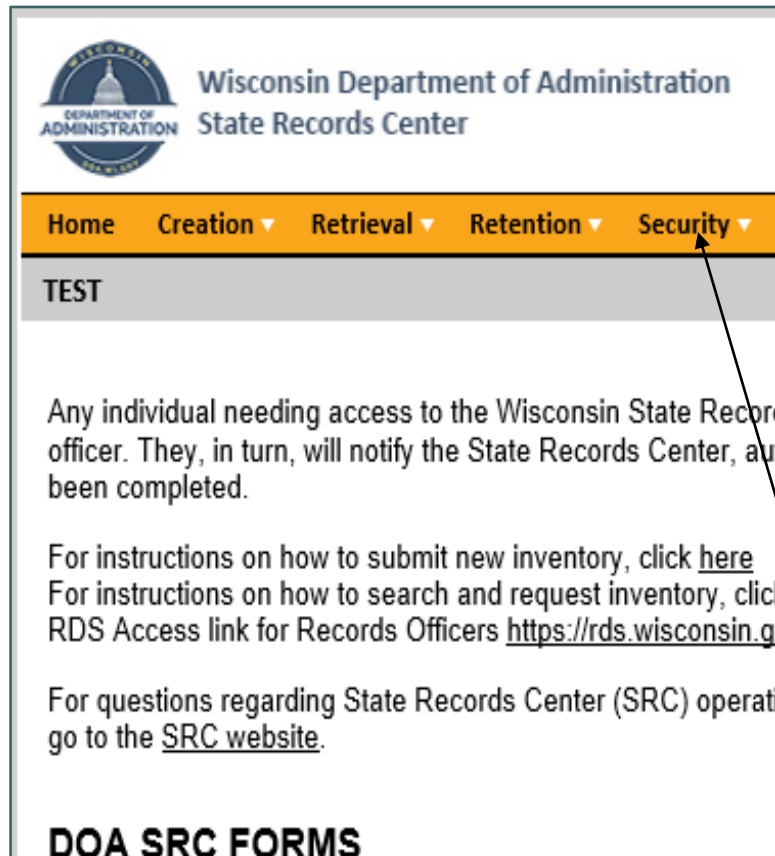


The screenshot shows the login page for the Wisconsin Department of Administration State Records Center. At the top left is the department's logo. To its right, the text reads "Wisconsin Department of Administration" and "State Records Center". Below this is a navigation bar with "Home", "Utility" (with a dropdown arrow), "Help", and "Login". A grey bar below the navigation bar contains the word "TEST". The main content area has the heading "Versatile Web Login Page" in orange. Below the heading is a paragraph: "This page provides access to Versatile Web. Please input your User ID and Password below." There are three input fields: "Company:" with a dropdown menu showing "505-ADMINISTRATION", "User Name:" with a text box containing "505-334-EGKA", and "Password:" with a text box containing six dots. A yellow "Login" button is positioned below the password field.

- **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.

# State Records Center

## Entering New Inventory



Wisconsin Department of Administration  
State Records Center

Home Creation ▾ Retrieval ▾ Retention ▾ Security ▾

TEST

Any individual needing access to the Wisconsin State Records Center should contact their Records Officer. They, in turn, will notify the State Records Center, and access will be completed.

For instructions on how to submit new inventory, click [here](#).  
For instructions on how to search and request inventory, click [here](#).  
RDS Access link for Records Officers <https://rds.wisconsin.gov>

For questions regarding State Records Center (SRC) operations, please contact the SRC website.

**DOA SRC FORMS**

- **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.

# State Records Center

## Entering New Inventory

The screenshot displays the State Records Center web application. At the top is a navigation bar with links: Home, Creation, Retrieval, Retention, Security, Utility, Help, and Logout. Below this is a header area with 'TEST' on the left and 'Hello, KATHRYN EGELAND-T!' on the right. A 'Record Series' dropdown menu is open, showing 'Record Series' with an arrow pointing to it. The main content area is titled 'Record Series' in orange. Below the title is a table with two columns: 'GENERAL SCHEDULES' and 'RECORDS MANAGEMENT-ENTERPRISE OPERATIONS'. The 'GENERAL SCHEDULES' column has a dropdown menu set to '505-ADMINISTRATION' and a 'Go' button. The 'RECORDS MANAGEMENT-ENTERPRISE OPERATIONS' column has a 'Go' button. Below the table, there are several rows of information:

Record Series Title	ADM00001: ROUTINE ACTIVITY AND PRODUCTION REPORTS CREATED BY INDIVIDUALS OR WORK UNITS
Record Series ID	ADM00001.
Active Retention:	
Inactive Retention:	CR+1
Open Date:	08/18/2008
Close Date:	

- 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

# State Records Center

## Entering New Inventory

**Record Series**

GENERAL SCHEDULES  505-ADMINISTRATION  RECC

Record Series Title	INVENTORY MAINTENANCE REQUESTS
Record Series ID	00074000.
Active Retention:	
Inactive Retention:	EVT+25
Open Date:	01/01/1980
Close Date:	
Event Date:	03/31/2027
Description:	Inventory maintenance requests submitted to the State Records Center by their clients. These changes, deletions, and organizational moves.  EVENT= Date Request Completed + 25 Years

○ Make a note of the RDA title, number, and level (global, company, or departmental) to aid 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.

# State Records Center

## Entering New Inventory

The screenshot shows the 'Box Creation Page' in the State Records Center. At the top, there is a navigation menu with tabs: Home, Creation, Retrieval, Retention, Security, Utility, Help, and Logout. The 'Creation' tab is active, and a dropdown menu is open, showing 'Box Creation Request' (highlighted with an arrow), 'My Box Requests', and 'My File Requests'. Below the navigation is the 'Box Creation Page' title. The form contains the following fields:


- Company: \* (505-ADMINISTRATION)
- Department: \* (RECORDS MANAGEMENT-ENTERPRIS)
- Record Series: \* (None)
- User Box Number: \* (SHATZI TEST 1)
- Type of Box: \* (A-FULL SIZE BOXES)
- From Date (MM/DD/YYYY): \* (02/19/2020)
- To Date (MM/DD/YYYY): \* (02/17/2021)
- Event Date (MM/DD/YYYY): \* (02/17/2021)
- Description: \*

At the bottom of the form, there are four buttons: 'Add Files', 'Submit Box', 'Save As Draft', and 'Clear'. A legend at the bottom left indicates '\* Required field'.

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.

# State Records Center

## Entering New Inventory

Current Record Series: None

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

GENERAL SCHEDULES	COMPANY	DEPARTMENTAL	RECENTLY USED
[A]			
<u>ADM00001: ROUTINE ACTIVITY AND PRODUCTION REPORTS CREATED BY INDIVIDUALS OR WORK UNITS (ADM00001.)</u> [?]			
<u>ADM00002: AGENCY BIENNIAL REPORTS (ADM00002.)</u> [?]			
<u>ADM00003: ADMINISTRATIVE RULES (ADM00003.)</u> [?]			
<u>ADM00004: CALENDARS AND SCHEDULES - APPOINTED STAFF OR EQUIVALENT POSITIONS (ADM00004.)</u> [?]			
<u>ADM00005: CALENDARS AND SCHEDULES - NON-APPOINTED STAFF (ADM00005.)</u> [?]			
<u>ADM00006: ANNUAL STATE SANCTIONED CHARITY CAMPAIGN (ADM00006.)</u> [?]			
<u>ADM00007: COMPLAINTS (EXTERNAL) NOT OTHERWISE REGULATED BY STATE OR FEDERAL REQUIREMENTS (ADM00007.)</u> [?]			
<u>ADM00009: APPOINTED STAFF OR EQUIVALENT POSITIONS BUSINESS - RELATED CORRESPONDENCE (ADM00009.)</u> [?]			
<u>ADM00010: NON-APPOINTED STAFF BUSINESS-RELATED CORRESPONDENCE (ADM00010.)</u> [?]			

- 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.



# State Records Center

## Entering New Inventory

**Box Creation Page**

Company: \* 505-ADMINISTRATION ▼

Department: \* RECORDS MANAGEMENT-ENTERPRISE

Record Series: \* ADM00012: TRAINING / COURSE MATERI

User Box Number: \* SHATZI TEST 1

Type of Box: \* A-FULL SIZE BOXES ▼

From Date (MM/DD/YYYY): \* 02/19/2020 31

To Date (MM/DD/YYYY): \* 02/17/2021 31

Event Date (MM/DD/YYYY): \* 02/17/2021 31

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

\* Required field

Submit Box Save As Draft Clear Help

- 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.

# State Records Center

## Entering New Inventory

### Box Creation Page

Company: \* 505-ADMINISTRATION ▾

Department: \* RECORDS MANAGEMENT-ENTERPRISE

Record Series: \* ADM00012: TRAINING / COURSE MATERIALS

User Box Number: \* SHATZI TEST 1

Type of Box: \* A-FULL SIZE BOXES ▾

From Date (MM/DD/YYYY): \* 02/19/2020 31

To Date (MM/DD/YYYY): \* 02/17/2021 31

Event Date (MM/DD/YYYY): \* 02/17/2021 31

Description: \* TRAINING BOX 1 - LEAPFROG THRU HOPTOAD  
CASE NUMBERS 400 THRU 592

LEAPFROG  
BULLFROG  
CROAKER  
HOPTAOD

\* Required field

Submit Box Save As Draft Clear Help

- 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.

# State Records Center

## Entering New Inventory

### Box Creation Page

Company: \* 505-ADMINISTRATION ▾

Department: \* RECORDS MANAGEMENT-ENTERPRISE

Record Series: \* ADM00012: TRAINING / COURSE MATERIALS

User Box Number: \* SHATZI TEST 1

Type of Box: \* A-FULL SIZE BOXES ▾

From Date (MM/DD/YYYY): \* 02/19/2020 31

To Date (MM/DD/YYYY): \* 02/17/2021 31

Event Date (MM/DD/YYYY): \* 02/17/2021 31

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

[Help](#)

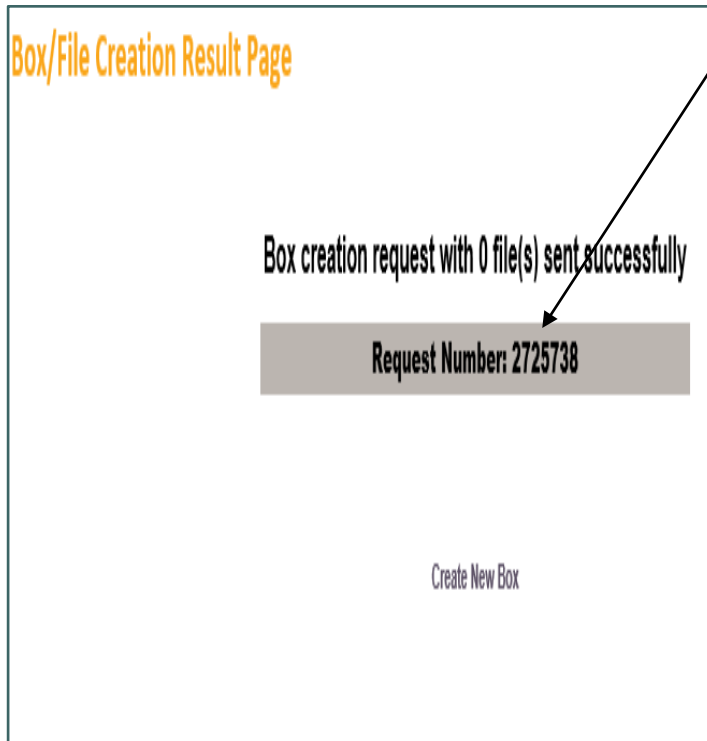
\* Required field

- 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.
- 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.

# State Records Center

## Entering New Inventory

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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.

# State Records Center

## Entering New Inventory

Home Creation Retrieval Retention Security Utility Help Logout

TEST Hello, KATHRYN EGELAND-T!

Box Creation Request  
My Box Requests  
My File Requests

### My Box Requests

Requested Date: 03/20/2020 to 03/28/2020 Status: All

Refresh

Request Number	SRC Box Number	User Box Number	Label Printed?	Requested Date	Department	Actions
2725736	Pending	SHATZI TEST 1 N		03/27/2020	RECORDS MANAGEMENT-ENTERPRISE OPERATIONS	
TRAINING BOX 1 - LEAPFROG THRU HOPTOAD CASE NUMBERS 400 THRU 592 LEAPFROG BULLFROG CROAKER HOPTAOD						

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.



# State Records Center

## Entering New Inventory

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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](mailto:doadeorecordscenter@wisconsin.gov) or call 608-266-2995.