
Using the State Records Center Web Module

Effective Date: July 1, 2011

(Procedure VSARA00012)

I. OVERVIEW/DESCRIPTION

The Vermont State Archives and Records Administration (VSARA) uses Versatile Enterprise Records Management Software (Versatile) to manage records stored in the State Records Center by state agencies, as well as records in the custody the Vermont State Archives. Versatile has a web module that allows state agencies to: access information about their records stored in the State Records Center; submit box transfer requests; and request boxes.

The goal of this guide is to provide users with information on gaining access to the Web Module, using the Web Module to search and run reports on records stored at the State Records Center, and using the Web Module to create new boxes to send to the State Records Center.

Your decision to utilize the Web Module will allow you greater control and access to your agency or department's records, and will save time and effort for staff in your office and in the State Records Center.

II. UNDERSTANDING VERSATILE

Within Versatile, there are five levels of organization for all records stored in the State Records Center.

1. Company
2. Department
3. Record Series
4. **Box**
5. **File**

A. Companies

In Versatile, a company is roughly equivalent to a State agency. In the past, this level of organization was little used, so most records are currently organized under the company

VSARA. Increasingly, records are being reorganized to make better use of this agency-level organization. For the time being your agency's records are most likely stored under the company VSARA.

B. Departments

Departments equate to the State department, division, or program to which records belong. All departments fall under a specific company. Each department is represented by a 2-5 letter ID code (e.g. ED for Education). This two-letter code will also serve as the prefix for your department's record series.

C. Record Series

A record series is a set of records that are grouped together based on the context in which they were created. This means that they are related by a particular function the department performs, or that they have other similarities. There can be many record series under any department. Each record series number will be prefixed by the department ID code (e.g. ED-001). If you've sent records to or requested records from the State Records Center in the past, you are probably familiar with these codes.

There is a specific retention period associated with each record series which is defined by either a disposition order or record schedule. All records under a record series will be retained and destroyed in accordance with the retention period of that series. *For this reason, it is very important that records be stored under the correct series.* Submitting records to the State Records Center under an inappropriate series can lead to the premature destruction of important and irreplaceable records.

D. Boxes

All records in the State Records Center are stored in boxes with unique box numbers. Boxes are stored under a record series, determined by the context in which the records were created. The retention period for each box is assigned automatically from the record series in which it is stored.

E. Files

In Versatile, a file is a division of records within a box. This level of organization allows you to identify the contents of each box in more detail. You have flexibility in how you use files in the database. Common examples include using files to itemize records by docket number, permit number, patient name, etc. The file level of description has also been commonly used to identify reels of microfilm or CDs as unique "files" within a box.

III. PROCEDURE/CHECKLIST FOR LOGGING INTO THE WEB MODULE

To use the Versatile Web Module, you will need:

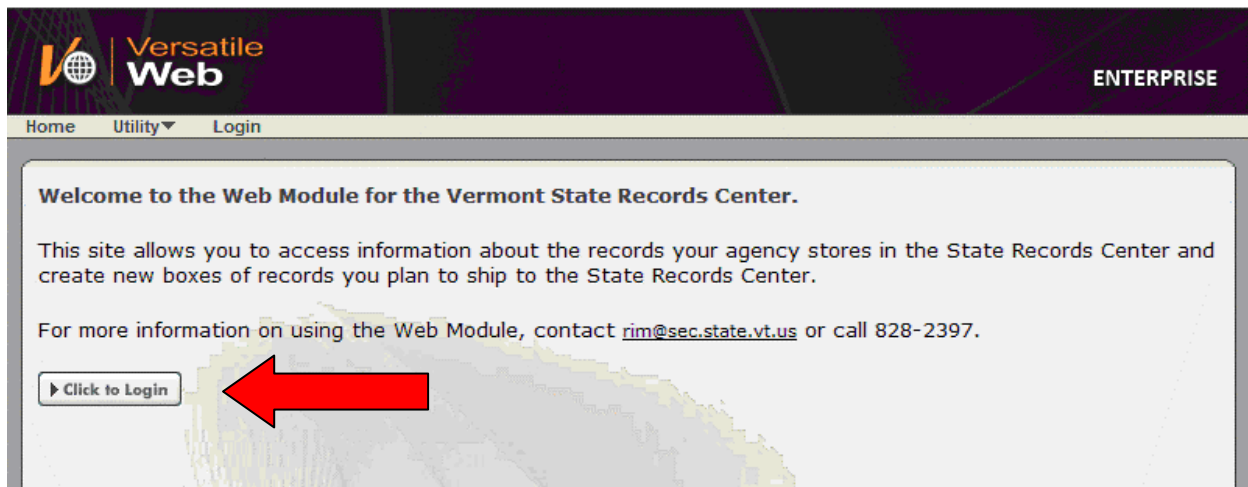
- To be a designated Records Officer or Records Liaison for your office
- A username and password assigned by VSARA
- Access to the internet via GovNet

If you do not currently have a username and password, contact rim@sec.state.vt.us or call 828-2397 to request one.

There are two ways to access the Web Module:

- Go to: <http://versatile.vermont-archives.org/recordsroot/login.asp>
- Go to: <http://vermont-archives.org/>, select “State Records Center” from the Managing Records menu, and click on “Online Box Transfer via Versatile Web Module.”

The welcome page for the Web Module is shown below. Select “Click to Login” to reach the login page.

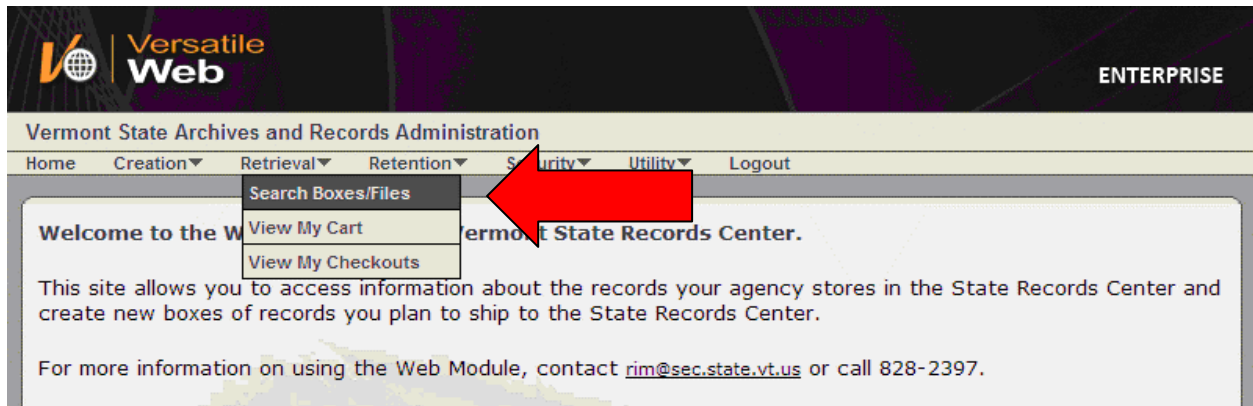


This is the Versatile Web Login Page. Enter your username and password as shown. The dropdown box for Company should be set to VSARA unless you've been told otherwise. Click the “login” button. Now that you've logged in, you're ready to search for records!

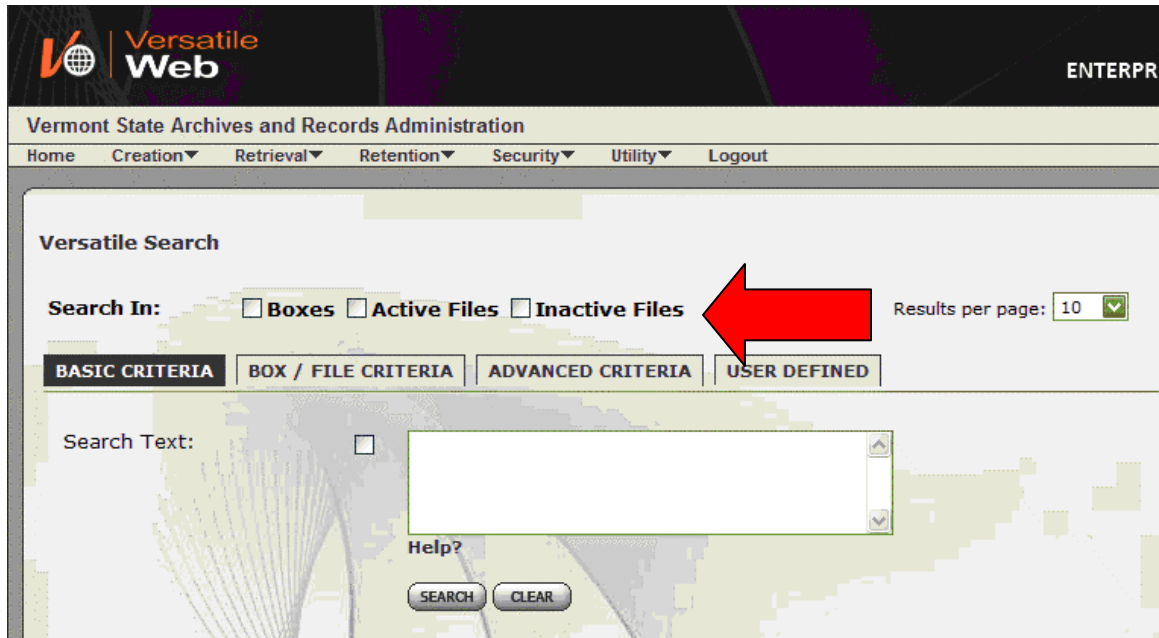
Company: VSARA
User Name: john.doe
Password: ●●●
LOGIN

IV. SEARCHING EXISTING RECORDS IN THE WEB MODULE

Select "Search Boxes/Files" from the Retrieval drop-down menu.



Before you search, you must identify that you are searching for boxes or files, or both, by clicking these boxes on the Versatile Search Page. To search for microfilm or CDs, select "Inactive Files." This is the level in Versatile where records in these formats can be found. *Please note that there are generally no "active file" entries in Versatile.*

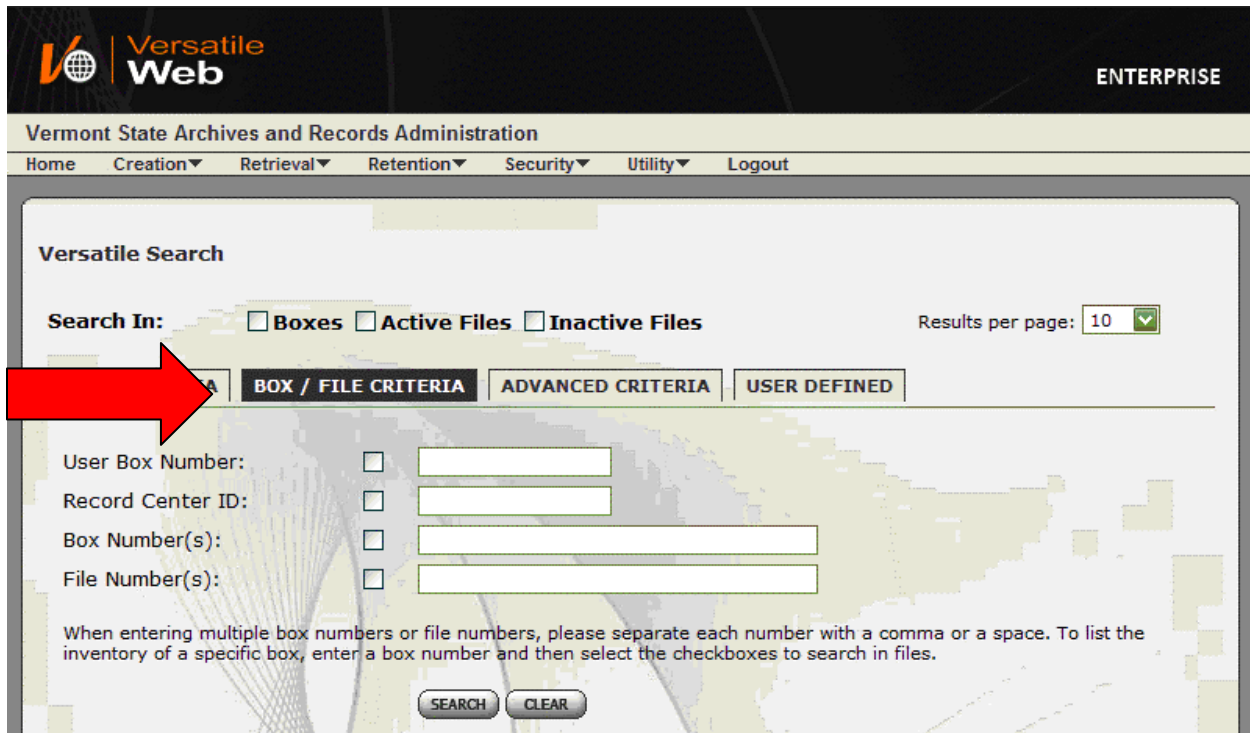


As seen above, there are a number of filters that will allow you to narrow down your search results. These filters are located on four separate tabs (basic criteria, box/file criteria, etc.), although most users only use the first three. You may combine filters from the different tabs before conducting a search.

Basic Criteria

The Basic Criteria tab will bring up a large text box to allow you to search for a specific name, keyword, or number, by searching the description field of boxes or films. This search is particularly useful in cases where box content has been indexed in detail. For example, if you are searching for licensing records and know that the names of each license holder were included in the box description when the box was sent to the State Records Center, a search for a license holder's name may be conducted here. For assistance with search strategies on this field, click the "Help?" link below the text box.

Box / File Criteria



Versatile Web ENTERPRISE

Vermont State Archives and Records Administration

Home Creation Retrieval Retention Security Utility Logout

Versatile Search

Search In: Boxes Active Files Inactive Files Results per page: 10

BOX / FILE CRITERIA ADVANCED CRITERIA USER DEFINED

User Box Number:

Record Center ID:

Box Number(s):

File Number(s):

When entering multiple box numbers or file numbers, please separate each number with a comma or a space. To list the inventory of a specific box, enter a box number and then select the checkboxes to search in files.

SEARCH CLEAR

Use the fields on this tab to search for a box or file by its unique identification number. Most people only use the "User Box Number" field when searching in Boxes. You may, however, use any fields relevant to your search. Be sure to note that some fields are specific to boxes and others to files. If you decided to search in Boxes but are entering criteria for files, you will receive an error message.

- *User Box Number:* The User Box Number is the alpha-numeric number consisting of a lettered prefix, a dash, and a five digit number that is assigned to each box in the State Records Center. The prefix denotes the agency or department which created these records. Be sure to pad the number with zeros so that there are five digits (e.g. PRA-00234).
- *Record Center ID:* The Records Center ID is the three digit series number. If you have entered a user box number, the record center ID is not necessary. *For the most part, you will not enter anything in this field.*

- **Box Number(s):** This is the system assigned box number and it can be found on box labels and most box detail reports. You may use this field if you know your system assigned box number but not your user box number.
- **File Number(s):** This is the system assigned file number and it can be found on microfilm or CD labels and most film detail reports. You may use this field if you know your system assigned file number but not your film number. *For the most part, you will not enter anything in this field.* Instead, to search for microfilm or CDs, use the text box on the Basic Criteria tab and enter the user file number that begins with CD-, F- or S- (i.e. F-02845).

Advanced Criteria

This tab allows you to filter your search results a number of different ways. We'll begin by discussing the first three options found in this search screen.

Search In: Boxes Active Files Inactive Files Results per page: 10

BASIC CRITERIA | **BOX / FILE CRITERIA** | **ADVANCED CRITERIA** | **USER DEFINED**

Company: VSARA

Department: /SE/ - SECRETARY OF STATE

Record Series: None

Create Dates (MM/DD/YYYY): to

Event Dates (MM/DD/YYYY): to

Content Dates (MM/DD/YYYY): to

Storage Room: None



Media Type: 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

Click on the boxes next to the fields you would like to search:

- **Company:** This defaults to your company and should remain unchecked.
- **Department:** The department under which the records are stored. If you access records under a single department, this selection will default to that department.

- *Record Series:* The record series under which the records are stored. This is where you are most likely to need to make a selection, and you can do this two ways:
 -  Click on the search button and search for text found in the title of your records series.
 -  Click on the list button and view a list of all the records series in your department and select that one you'd like to search.

Remember to be sure that you've selected whether you'd like to search boxes and/or files at the top of the screen!

Note: If you find that the Versatile Web Module is not defaulting to your company or department, please contact VSARA at rim@sec.state.vt.us to have your user account corrected.

The next three options are ways to narrow a search for a box or file based on date. Click on the boxes next to the fields you would like to search:

- *Create Dates:* This should be the “To” date that was listed on the box description when the box was transferred to the State Records Center. The “To” date should be the date of the latest record in the box or file and is the date that is used to calculate retention.¹
- *Event Dates:* This field is not used in the system. Do not check.
- *Content Dates:* This field allows you to search for a range of dates of the contents of a box or file based on the “To” and “From” dates that were listed for the box or file when it was originally transferred into the State Records Center. Example: To search for records from the 1980s, enter *01/01/1980 to 12/31/1989* in this field. This will return all boxes/files containing records from that period.

The final two fields, Storage Room and Media Type, are system fields. Do not check.

User Defined

On this tab, you can filter your search by miscellaneous data fields that do not fall under the previous tabs. However, these fields are usually only needed by State Records Center staff, it is unlikely that you will need to use this method of searching.

Barcode Only

This tab allows you to filter your search by the barcode of a box or file. This is usually only necessary for staff at the State Records Center but barcode numbers can be found on box and file labels generated after records are received and processed by State Records Center staff.

¹ In the past, when agencies asked to retain records longer, the creation date was advanced. This practice has been replaced by Retention Holds. However, for boxes transferred into the State Records Center prior to 2008, the creation date may not match the “To” date of a box. Files are not affected by this practice.

V. UNDERSTANDING SEARCH RESULTS

The search results page begins with a description of the search filters you applied and the number of items located. Only a certain number of items are shown at a time (the default is 10), but you may view additional records by navigating to the next page. As an example, here are the results for a search of all boxes in a Secretary of State's Office record series.

Search Results CONFIGURE

Search Results for:
Searching in Boxes where company is 'VSARA' and department is 'SECRETARY OF STATE' and record series is 'ADMINISTRATIVE PROCEDURES ACT'

34 Physical Record Entries Found

Result pages: [1](#) [2](#) [3](#) [4](#) [[>](#)] [[>>](#)]

Items displayed : 1 to 10 (10 items per page)
There are currently 0 item(s) in your cart.

Select "Print/E-Mail Results" to print or send a report of search results.

[PRINT/E-MAIL RESULTS](#)
(Prints all 34 items)

	Description	Barcode	Created	Department
+	00P S-35573	%00168290	11/30/2001	SECRETARY OF STATE
+	00P S-35573	%00168291	11/30/2001	SECRETARY OF STATE
+	94P S-35517	%00168270	11/30/2001	SECRETARY OF STATE
+	94P S-35517	%00168271	11/30/2001	SECRETARY OF STATE
+	94P S-35518	%00168272	11/30/2001	SECRETARY OF STATE
+	95P S-35518	%00168273	11/30/2001	SECRETARY OF STATE

The dark gray header at the top of the list of search results provides some basic information about the boxes or files you are viewing.

	Description	Barcode	Created	Department
+	00P S-35573	%00168290	11/30/2001	SECRETARY OF STATE

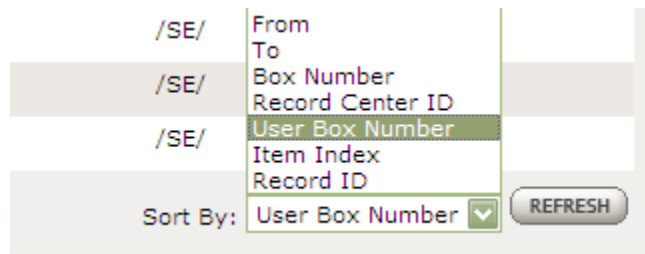
The default fields in Search View are:

- **Cart:** Indicates the current availability of an item (see [Section VII: Requesting Records from the State Record Center](#)).
- **Description:** A brief description of the item. To the left of the description will be a small icon of a box or file. To see a full description of the item, click on this icon.
- **Barcode:** The item's barcode number.
- **Created:** The date on which the retention of the box is based, which is usually the date of the latest record in a box or file.

- *Department:* The department under which the item is stored.

To change which fields are shown, click the **CONFIGURE** button in the top right corner. You may add or remove columns and select their width, and also adjust order by selecting the up or down arrows. These configurations will not only appear in the search results view but any reports that are printed or e-mailed from the search results.

You may also change the order in which records are sorted by selecting a field from the drop-down box in the bottom right-hand corner, and clicking “Refresh.” Although you may sort by any field, only fields currently in your configuration will appear on the search screen.



We hope that you’ll find these methods of searching for records in the Web Module useful. Keep in mind that you’ll be searching only that information that your department submitted when sending boxes to the State Records Center. The more detailed information you submit when you create boxes, the more useful a tool the Web Module will be in locating records later.

VI. SUBMITTING NEW BOXES TO THE STATE RECORDS CENTER

As a records officer or liaison, you can use the Web Module to directly submit new boxes to the State Records Center, rather than preparing and sending records transfer sheets. Using the Web Module to create new boxes saves you and the Records Center Staff time and effort!

Before you begin using the Web Module to submit boxes, be sure to follow the procedure for [Transferring Records to the State Records Center](#) (Procedure VSARA00008). A Records Pickup Request ([VSARA-04](#)) or Records Delivery Request ([VSARA-028](#)) must be received and approved by the State Records Center Supervisor before any boxes can be transferred to the State Records Center.

Once you’ve contacted the State Records Center Supervisor and have received your box numbers, login to the Web Module and select “Box Creation Request” from the “Creation” menu at the top of the page.



The next screen will look very similar to the Advanced Criteria search screen. If you have access rights to multiple departments, select the appropriate department and records series into which you are transferring boxes. Ensure that the record series matches the types of records in your boxes. If needed, refer to the series' corresponding disposition order or record schedule to understand the retention requirements. Your agency's records officer should have copies of all disposition orders or record schedules being used. You may also check online at: <http://vermont-archives.org/records/schedules>

Next, enter the first box number you received from the State Records Center Supervisor. Remember that all user box numbers start with a prefix and a dash and are then five digits long.

Make sure "Type of Box:" is always set to "Standard (2 position)" and "Storage Center:" is the "Middlesex Record Center."

For example:

Company: *	VSARA
Department:	/SE/ - SECRETARY OF STATE
Record Series:	134. - ADMINISTRATIVE PROCEDURES ACT
User Box Number:	SE-05012
Type of Box:	STANDARD (2 POSITION)
Storage Center:	MIDDLESEX RECORD CENTER

Next, you'll add box content dates and a box description. Type in the earliest and the latest dates of records identified in the box and submit a brief description of contents in the box provided. If you are sending a creation request from a district office please add your town or city name as the first line of the description.

The box description should be a summary of content in the box and detailed enough for other and future agency staff members to understand the content of the box. Your agency should also have a separate detailed internal indexing system to locate and retrieve the records from storage; this is particular true if your boxes contain sensitive information. Do not enter sensitive information, such as social security numbers, in box descriptions.

Please do not use the box description field for long lists of names or itemized content. Where possible, use a range if your content is organized by date, name, or some sequentially filing number or system. There are also other fields within Versatile that can be used for entering file level information. Please contact the State Records Center Supervisor at 802-828-3280 or recordscenter@sec.state.vt.us if you would like to enter file level data into Versatile.

From Date (MM/DD/YYYY): * 11/01/2010

To Date (MM/DD/YYYY): * 11/30/2010

Event Date (MM/DD/YYYY):

Description: *
Administrative Procedures Act - Proposed /Final
Proposed Filings 09P041 through 09P054 and
10P001 through 10P012.

Destruction Location: None

Box Full:

We recommend leaving some space in each box to facilitate future use and retrieval. Do not over pack the boxes. Check “Box Full” if the box cannot accommodate any addition records or files.

To submit your box transfer request, click the “Submit Box” button. The Web Module will show a screen letting you know that the box was submitted successfully. You can now click “Create New Box” to continue adding boxes to the Web Module.

VII. REQUESTING BOXES FROM THE STATE RECORDS CENTER

This feature is currently only available to circumstances in which you would like to request an entire box, a reel of microfilm or a CD (if itemized in the system). It cannot be used to request individual files from a box because files are not entered into Versatile at this time and therefore cannot be requested. If you would like to use the Web Module to request an entire box, a reel of microfilm or an itemized CD, please contact the State Records Center Supervisor prior to submitting a request for the first time.

VIII. Getting Help

For questions about:	Contact:
Username and password and assistance using the Web Module	Records Analysis and Policy Development Unit rim@sec.state.vt.us or 802-828-2397
Correcting box or file data and sending boxes to the State Records Center	State Records Center Supervisor recordscenter@sec.state.vt.us or 802-828-3280

IX. APPLICABILITY AND AUTHORITY

This procedure is for using the State Records Center Web Module.

This is a new procedure and therefore supersedes any State of Vermont practices in existence prior to its effective date.

The Vermont State Archivist is the statutory authority for maintaining a records center and for this procedure on retrieving records from the records center. This procedure was reviewed and approved by the Vermont State Archivist on June 27, 2011. The next review date is June 2013.