Versatile Web User Guide

Construction Records Transmittal and Retrieval Procedures
For MDOT TSCs

Date Revised: 1/27/16

Trainee Name	
User Name	
Department	Transportation
Department Code	/59/DIS/
Versatile Access Password	

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Introduction

Both the Records Management Services (which operates the State Records Center) and the Archives of Michigan are agencies of the Department of Technology, Management and Budget. Together, these agencies ensure that Michigan government records are managed and preserved in a manner that promotes the effective and efficient operation of government activities, and that protects Michigan's documentary heritage. The State Records Center and the Archives of Michigan use the same software, Versatile Enterprise, to manage records in our custody.

This manual will teach you how to transfer and receive containers to/from records center, and input information into Versatile.

If you have any questions about these procedures, please contact the Records Management Coordinators (RMCs) at the Construction Field Services Division, (517) 322-5028 or (517) 636-6089.

Definitions

State Records Center

The State Records Center is operated by the Records Management Services of DTMB and located at 3800 W. Grand River.

Records Management Coordinators (RMCs) and Construction Records Coordinator (CRC)

Each TSC will designate a construction employee to serve as the CRC to oversee the retention of construction project records. The RMCs will be responsible for providing instruction to the CRCs statewide. The RMCs will also serve as liaisons between the CRCs and Records Management Services in coordinating pickup and microfilming of records.

Versatile

Versatile is a web-based program used to support various records management, storage and preservation activities.

Each CRC will be given a Versatile user account. The RMCs will provide you with the information you need to access Versatile.

Retention & Disposal Schedule

The Retention & Disposal Schedule is a legal document (required by state). This schedule provides the legal authority to dispose of state records and indicates how, when and in what manner records are to be retained and destroyed. If you need a copy of this document, please contact one of the RMCs.

Record Series

All MDOT TSCs will use Record Series 28910, which is for Construction Project Records. Some of these records will be kept for 4 years and some other will be microfilmed as outlined in the schedule. The microfilm will be kept as a permanent record.

Preparing & Packaging Boxes Prior to Transfer

The initial preparation step is to examine the contents of each box to locate those files that have been identified as requiring microfilming. Microfilm is considered a permanent file. The following table lists the common forms and record types used for the administration of MDOT projects as well as the retention and disposal of each. All forms and record types listed may not be used by all offices. Moreover, there may be forms and record types used that are not listed here. The absence of a form or record type from this document or from the retention & disposal schedule does not exclude it from the State of Michigan's Retention Policy.

File #	Description	MDOT Form #	Retention
100	**Administration**		
100	**Award Letter**		**4 years**
101	**Contract Form**		
	Progress Schedule	**1130**	**4 years**
	Weekly Statement of Work Days Charged	**1116**	**4 years**
	Critical Path Method(CPM)		**4 years**
	Workzone Enforcement Contracts		**4 years**
102	**Sub-Contracts**		
	All Subcontracts	**1302**	**4 years**
	Commercially Useful Function (CUF) Project Site Review	**4109**	**4 years**
	DBE participation (blue sheets)	**0178**	**4 years**
	DBE Trucker Project site review	**1992**	**4 years**
	Prime Contractor Bi-Weekly statement of Subcontractor payments	**2124-A**	**4 years**
103	**Work Orders**		
	Notice of Non-Compliance with Contract	**1165**	**4 years**
	Work Orders	**1137**	**4 years**
104	**Contract Modifications**		
	Extension of Time request	**1100A**	**4 years**
	Value Engineering Change Proposal	**1962**	**4 years**
	Supporting Documentation		**4 years**
104-1	**FHWA 1365 Pre-Approvals**		**4 years**
105	**Contractor Claims and Force Account**		
	Damage Claims Notices	**1119D**	**4 years**

	Force Account Documents		4 years
	Copy of Permit Checks		4 years
106	Estimates and Closeout Package		
	Final Acceptance/Certification Report	1120	4 years
	Final Estimate package Memo	1105	4 years
	Final Estimate Review Summary	1147 & 1147 C	4 years
	Post Certification of Subcontract compliance (Copy)	1386	4 years
	Final Engineering Acceptance Report - FHWA		4 years
	Construction Pay Estimate Report(Bi-Weekly Pay Estimates)		4 years
	Construction Pay Estimate Report(Final Pay Estimate)		4 years
	Final project voucher summary(Signed from CSD)		4 years
	Work Completion letter from contractor		4 years
	Stockpile Data		4 years
107	Warranty Documentation		
	Warranty Correspondence		4 years
	Contractor Performance Evaluation - Warranty	1182W	4 years
	Bridge	1802	4 years
	Traffic		4 years
	HMA	Series 1134	4 years
	Concrete	1029,1115,1831, 1884, 1885,1881	4 years
	CPM	Series 1193, 1184, 1046 1047,1893,1894, 1946 1947,1948,1949, 1167	4 years
108	Correspondence		4 years
109	Preconstruction and Progress Meetings		
	Damage Claim Program		4 years
	Safety Program		4 years
	Subcontractor's list		4 years
	Emergency Contact List		4 years
110	Utilities, Permits and Real Estate		
	Property Agreements and release		4 years
	Construction Permit		4 years
	Miss Dig Document request		4 years
200	Field Records		

200	Inspector's Daily Reports	1122B	4 years
200-1	Photographs & Videos		4 years
201	Shop Drawing and submittals		4 years
201-1	Request For Information(RFI)		4 years
201-2	Survey		
	CSQCP		4 years
202	Earthwork		
	Grade Check	1145	4 years
	Record Of Soils Recommendations	0583	4 years
202-1	NPDES and SESC Reports	1126	
	Environmental Permits		4 years
	Notice of Termination(NOT)		4 years
	Notice of Completion(NOC)		4 years
	Soil Erosion And Sedimentation Control		4 years
203	Bases		
	Subbase		4 years
	Aggregates		4 years
	Rubbilizing Portland Cement Concrete Pavement		4 years
	Geotextile for Base		4 years
	HMA Base Crushing and Shaping		4 years
	Aggregate Delivery Tickets		4 years
204	Drainage		
	Pumpstations		4 years
	Drainage Items		4 years
205	Hot Mix Asphalt (HMA)		
	HMA Crack Treatment		4 years
	Surface Seal		4 years
	Micro-surfacing		4 years
	Chip Seals		4 years
	Slurry Seal		4 years
	Pre-production Meeting Minutes		4 years
	HMA Delivery Tickets		4 years
206	Concrete		

	Inspector's Report of Concrete placed - Roadway	1174R	4 years
	Inspector's Report of Concrete placed - Structure	1174S	4 years
	Coring Request	0500	4 years
	Contractor's QC Test Reports (Air, slump, temp)		4 years
	Pre-production Meeting Minutes		4 years
	Ride Quality		4 years
	Concrete Delivery Tickets		4 years
207	Structure		
	Bridge Decks Concrete Depth Measurements	1131	4 years
	Bridge Reinforcing Computations	1138	4 years
	Foundation Piling Record (LRFD)	1161(L)	4 years
	Pile Driving Table	1157A	4 years
	Structure - Clearance Measurements	1190	4 years
	Structure Painting forms	1941	4 years
	Test Pile Record	1157	4 years
	Drilled Shaft Concrete Volume Plot	0393	4 years
	Drilled Shaft Inspection Record for Highway signs, Luminaires, TS	1988	4 years
	Micropile Installation Record	1989	4 years
	Cofferdam Installation, Piling Placement, and Tremie Pour Inspector's Checklist	1990	4 years
	Sheet Piling and Cofferdams		4 years
	Precast Concrete Beams		4 years
	Hydrodemolition Documents		4 years
	Waterproofing		4 years
208	Miscellaneous		
	Permit To Place	1125	4 years
	Fencing		4 years
	General Comps.		4 years
	Guardrail		4 years
	Slope Restoration		4 years
	Watermains		4 years
	Permanent Traffic Signs		4 years
	Electrical Items		4 years
208-1	Traffic		
	Inspector's Checklist For Inspection for Solar Boards	1013S	4 years
	Mobility Report	1998	4 years
	Pavement Marking Material Verification Checklist	1585	4 years
	Traffic Control Report Form	1996	4 years
	Traffic Advisories		4 years

209	Delivery Tickets (Miscellaneous)		4 years
300	**Material Testing**		
300	Material Source List	0501	Permanent
301	Density		
	Independent Assurance Test	0509	Permanent
	Moisture and Density Determination of Soils	0582-B	Permanent
	Record of Density Retests	0582-A	Permanent
302	Earthwork		
	Erosion Control Silt Fence		Permanent
303	Aggregate		
	Aggregate Inspection Daily Report	1900	Permanent
	Independent Assurance Test	0504	Permanent
	Mechanical Analysis Report	1901	Permanent
	Report of Test		Permanent
304	Drainage		
	Field Report For Concrete Pipe	1920	Permanent
	Field Report For Precast Drainage Items	1920A	Permanent
	Report of Test		Permanent
305	Hot Mix Asphalt (HMA)		
	Daily Report of Bituminous Plant Inspection	1903	Permanent
	Daily Report of Contractor's Quality Control Tests	1903-C	Permanent
	HMA Quality Assurance Plan	0587	Permanent
	Independent Assurance Test	1842	Permanent
	Job Mix Formula (JMF) Bituminous Field Communication	1911	Permanent
	Report of Compacted Bituminous Mixture Core Density & Percent Compaction	1907	Permanent
	Report of Quality Assurance Testing	1903-B	Permanent
	PWL spread sheet		Permanent
	QA/QC Plan		Permanent
	Report of Test		Permanent
306	Concrete		
	Concrete Cylinder/Core Compression Test Results	1160-A	Permanent
	Concrete Plant Equipment Inspection Report	0580	Permanent

	Concrete Plant Inspection	0580-A	Permanent
	Concrete Proportioning Plant Report	1174	Permanent
	Independent Assurance Test	0503	Permanent
	JMF Concrete Field Communication	1976	Permanent
	Pavement Core Record	0502	Permanent
	Report Of Modulus Of Rupture	1160	Permanent
	Summary Report of Field Tests and Cylinder Results	0590	Permanent
	Weekly Summary Of Cert. Concrete/Comm. Central-Transit Mix	1155	Permanent
	PWL spread sheets		Permanent
	QA/QC Plan		Permanent
	Report of Test		Permanent
306-1	QA/QC		
	Concrete Field Cylinders Test Results	1999	Permanent
307	Structure		
	Magnetic Particle Inspection Report	0538-A	Permanent
	Report Of Ultrasonic Examination Of Welds	0538-B	Permanent
	Structure Foundation Inspection	0579	Permanent
	Report of Test		Permanent
308	Miscellaneous		
	Fencing		Permanent
	Guardrail		Permanent
	Report of Test		Permanent
	Slope Restoration		Permanent
308-1	Traffic		
	Cantilever and Bridge Mount Inspection	0519	Permanent
309	Material Certifications		
	Shipment Of tested Stock Report	1922	Permanent
400	**Internal Use Only**		
400	Contractor Performance Evaluations (CPE)		4 years
401	Certified Payrolls		
	Certified Payrolls	CP-347/WH-347	4 years
	Certified Payroll Review Checklist	1952	4 years
	Certified Payroll Status Log	1954	4 years
	Contractor's Certified Payroll	1955	4 years
	Jobsite Poster Inspection Checklist	1967	4 years

	Minimum Wage Rate - Interview Sheet Tier1	**1156-T1**	**4 years**
	Minimum Wage Rate - Interview Sheet Tier2	**1156-T2**	**4 years**
	Apprenticeship & Trainee Reports		
402	**Consultant contracts**		**4 years**
403	**Internal Claim Documents**		**7 years**
404	**QA Random Numbers**		
	Concrete		**4 years**
	HMA		**4 years**

Preparing the Records

Purge duplicate copies of records. Remove any empty file folders as there is no need to send them to the Record Center. You will need to identify files that will not be microfilmed by bundling those files together, within their file series, and writing "Do Not Microfilm" on the front folder or a piece of paper in the front of the bundle.

Item Number and Box Dimensions

- Standard Boxes (used for letter and legal-sized files, binders, etc.):
  #P758302520 (71385) (15" x 12" x 9.75")

- Long Boxes (used for rolled items, such as plans):
  #P758307040 (71387) (26" x 12" x 9.75")

Placing Files in Boxes

- Place project records into boxes in the same order as listed in the retention table.
- Letter-sized files should face toward the front of the box, where the label will be affixed.
- Legal-sized files should face toward the side of the box that is to the left of the label.
- Leave a two-inch clearance in the box to facilitate reference of items in the box. Do not overstuff boxes as they will not fit on the shelves. If you anticipate that additional files or documents will be added in the future, please leave additional space.

Loading/Accessing Versatile

The Versatile software is accessed through a State of Michigan intranet server using Microsoft Internet Explorer.

Please perform the following steps to load and login to Versatile:

1. Open Microsoft Internet Explorer
2. Enter the following web address:
   https://versatile.state.mi.us/recordsroot/login.asp. Be sure to save this address in your Favorites.

Click on 'Click to Login'.

Enter your User Name and Password. If you need a User Name and Password, please contact the RMCs.

Box Creation
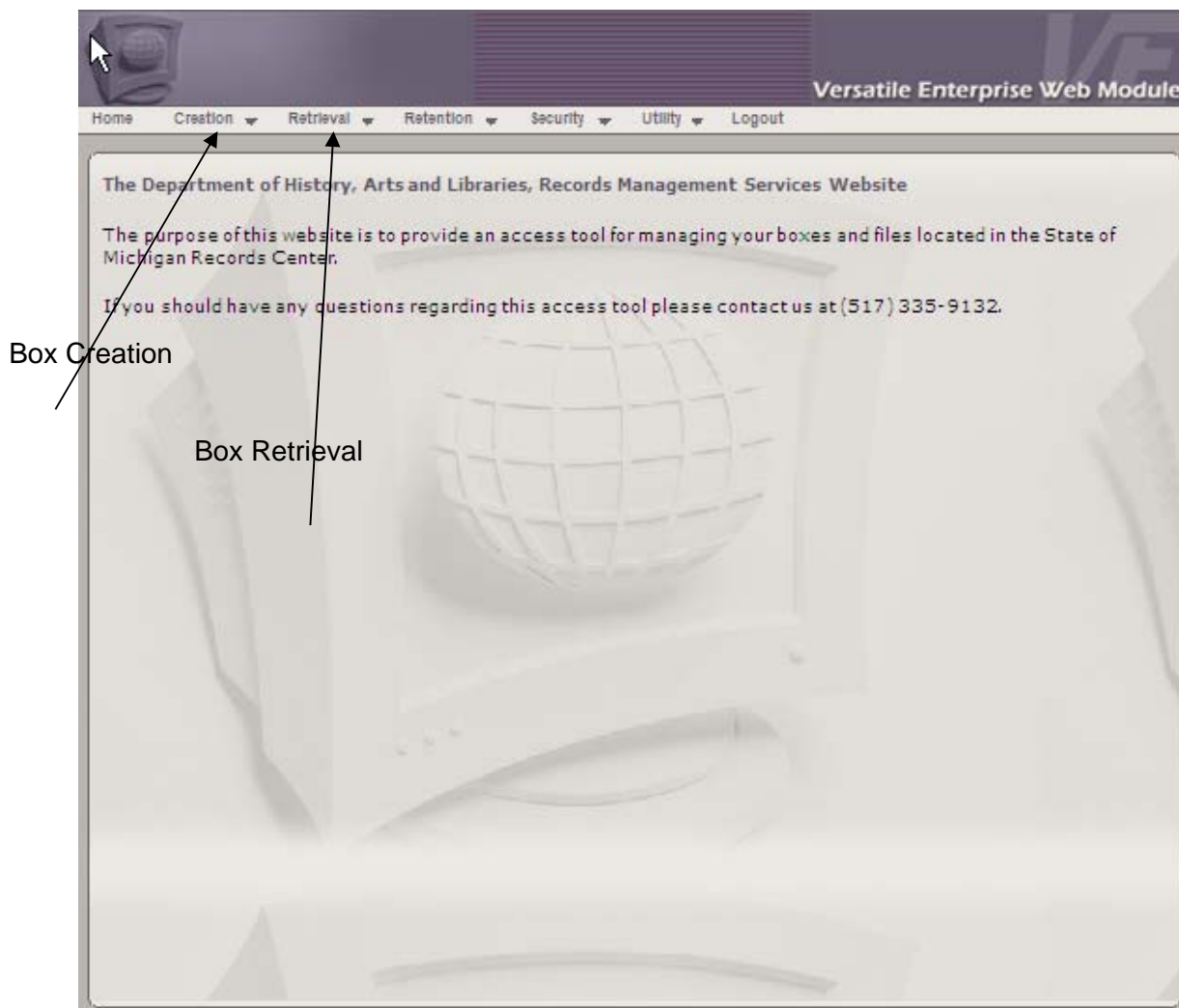
Box Retrieval

The home screen will appear, from which you can create or retrieve boxes.   Click the down arrow next to either of these options will bring you a drop down menu pictured below:

Creation   Retrieval

     or
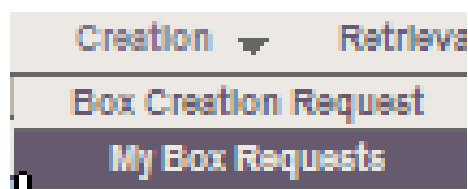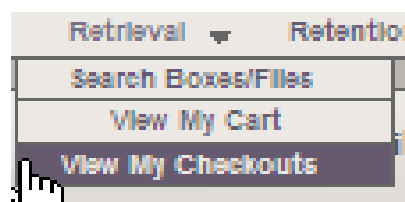
Note: You will need to use these pull-down menus when in Versatile rather than using the back button provided in Microsoft Explorer.

Box Data Entry

From the home page click on 'Creation' to provide the dropdown list and then click on "Box Creation Request". You will get the following screen:

This is the screen you will use to submit information about the contents of each box.

1. The Company Field should automatically populate with "Michigan Records Management – State".

2. For the Agency/Department Code, click on the group of lines next to the magnifying glass and should get the following:

   + /59/ (Transportation); click the + and you'll get /59/DIS/ (Region Offices); click on /59/DIS/ (Region Offices) and it will re-direct you to the previous screen.

3. Repeat the same actions with the lines next to Record Series. Select 28910 – (Construction Project Monitoring Records (supersedes Item #5420C, D1, D2, E, 5422, 28909)). The screen should appear as follows:
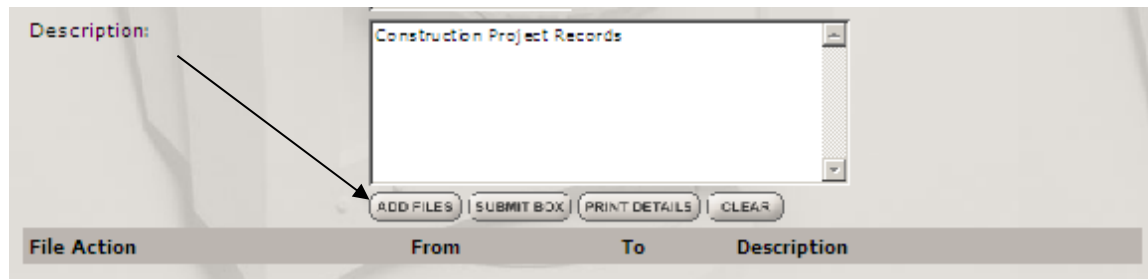
1. Fill in the user box number starting with 1.

2. The 'Content From' date should be populated with the earliest award date of any project within the box. The 'Content To' date should be populated with the latest FOD date of any project within the box. If you do not have these dates or access to them, contact your RMCs.

3. In the description field, type "Construction Project Records". If any of the contents in the box is to be microfilmed, note it in this area. Descriptions should contain enough information for a future user to find what they are looking for. There is a 4000 character limit in this field. Remember, users often search this field when trying to find the box they need to retrieve. Abbreviations, initials and typos can lead to failed searches. Only the first line of the box description will appear on the box label.

    Note: Each file within the box can be itemized in a different screen, but isn't necessary. Instead, the contents of each box can be listed here.

Itemizing Files – Creating labels for each folder (optional)
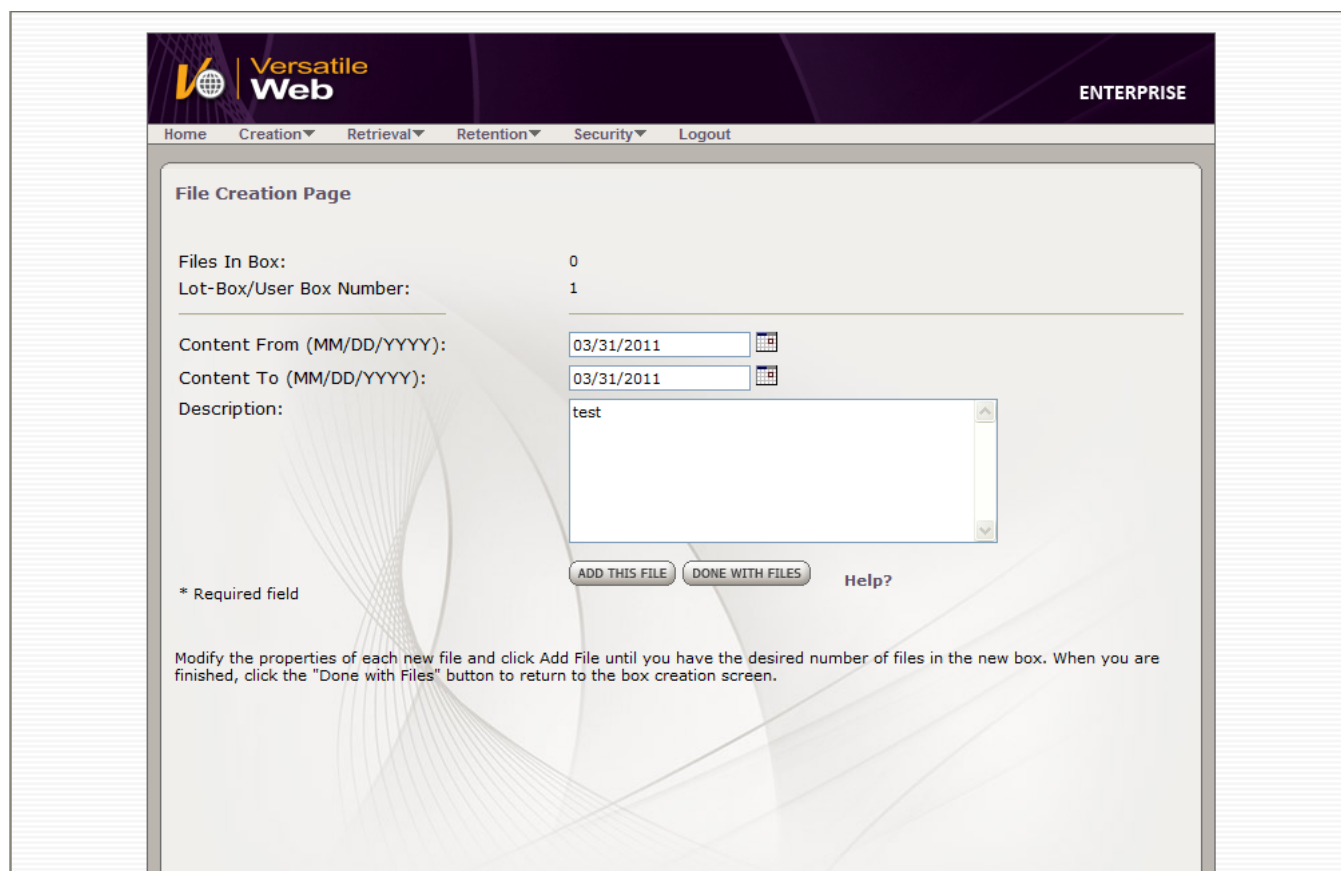
If all of the projects were listed in the Description area, you can skip this step.

After a description has been entered, the folders can be itemized. Click the 'Add Files' button under the description box.

This page will appear:

You do not need to enter content dates on this screen. Just tab to the description field and enter a description of the contents of the file. Please use the following format: 11111-111111A, Files 100-307. **If there is more than one project for a Contract ID, you must enter the information for each project under that contract individually.** Click the "Add This File" button. Clear your information and repeat these steps for each project file in the box. Every time you click "Add This File", the counter on "Files in Box" changes to help you keep track.

See below:

Click on "Done With Files" when finished.   The previous screen will appear and review all the information. The files that were itemized will be listed at the bottom for easy review.

It is important that you take this time to review your entries as it is the <u>only</u> time you will have to do so.

If you need to make a correction, just click on the "edit" button and it will open that itemized file for you to make any necessary changes. After making changes, please review the information again.

Since you are entering multiple boxes, you may want to save all of them as drafts until you are done entering the last box. Once you have reviewed what has been entered and verified against what is in the box, you may click on "Submit Box". For the multiple boxes, this needs to be done 1 box at a time.

Once a box has been submitted, another screen will appear with your Request Number on it. Please make note of this number in case you need it for reference.
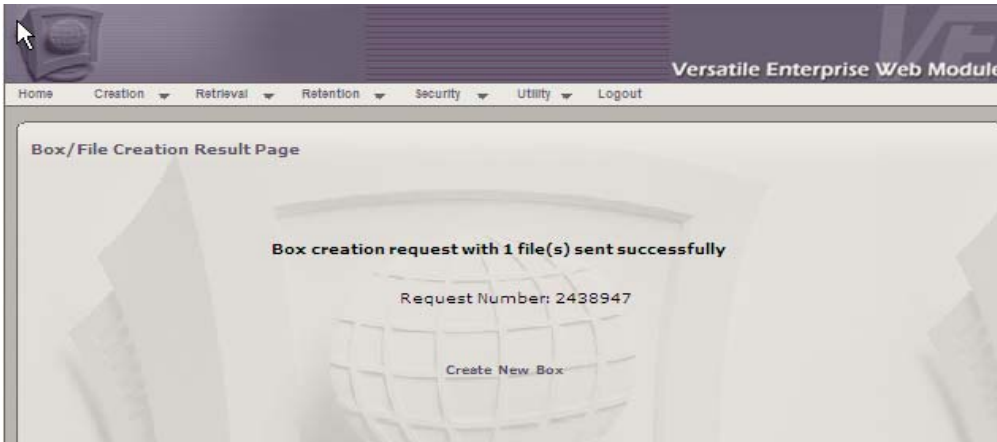
Record Center staff will receive the information submitted. An e-mail message will be sent confirming that your barcode labels will be mailed to you (examples below). Please place the barcode labels on the appropriate folders (if itemized) and boxes **before** shipping them.

File folder label   Box label

Once the information is entered into Versatile, please notify the RMCs by e-mail so the appropriate microfilm information can be sent to your office.

Canceling or Modifying a Box Creation Request

If you need to cancel or modify a box creation request:

- Send an e-mail to recordscenter@michigan.gov
- Put the words "Box Creation Request" in the subject line.
- Provide the Request Number that you received when you submitted the request, the box description, or user box number to identify the box.
- Provide details about the specific changes or cancellation you are requesting.

Sealing the Containers

Boxes should be sealed according to the following instructions to best facilitate their placement and removal from the shelving units:

- Fold in the end flap that is at the far end of the box, opposite from the label.
- Fold in the two side flaps so they lie over the end flap that was just folded in.
- Fold over the remaining end flap that is at the label end (front) of the box, so that it lies on top of the two side flaps that were folded in.
- Place a strip of 2-inch wide packing tape fully across the last end flap and approximately half way down the sides of the box securely holding the box shut.

Boxes To Be Microfilmed

- Write 'To be filmed" on the record center boxes within the area that the Record Center label is affixed. **Make sure you do not write on the bar code of the label.**
- Write the Record Center numbers of the boxes to be filmed on the Graphic Sciences Microfilm Job Order form.

Shipping New Boxes

Once the labels have been received in your office, be sure to place them on the itemized folders and boxes correctly.   Remember to identify the boxes for microfilming as outlined above.

Procedures differ based on your office location as listed below:

1. **Material from the offices in the Metro Region and Lansing TSC will be picked up by Graphic Sciences (GSI) personnel directly from the TSC.**

    A confirmation e-mail from the Record Center will be sent, along with an attached packing slip**. Please reply to the e-mail to cancel the pick-up order as GSI will be picking up the boxes.**

    Prior to the execution of the pick-up, the TSC will contact Construction Field Services (CFS) and indicate that they are ready to have records transported to GSI for microfilming. CFS will complete the upper portion of the Graphic Sciences microfilm job order form and send it to the TSC, keeping a photocopy for CFS' records. The TSC will finish completing the job order form with the appropriate information as instructed by CFS. Once the TSC has received the multi-part job order form, it will contact GSI (800-397-6620) to make arrangements for a material pick-up. GSI will execute the pick-up, complete the form by indicating the amount of material received. The TSC will maintain the last copy of the multi-part job order form as verification that the boxes were picked up by GSI.

2. **All Non-Metro regions will use a similar process with the exception that records will not be picked up by GSI.**

    When a TSC has records to be microfilmed, they will contact Construction Field Services (CFS). CFS will complete the upper portion of the Graphic Sciences microfilm job order form and send it to the TSC, keeping a photocopy for CFS' records. The TSC will finish completing the job order

form with the appropriate information as instructed by CFS.   The last copy of the multi-copy job order form should be retained by the TSC. The balance of the multi-part form will be placed in an envelope and the envelope should be taped to the first box containing materials to be microfilmed. The envelope shall be marked "JOB ORDER DOCUMENT ENCLOSED." When the records are received by the Records Center, they will be sorted into two categories, those boxes that require filming and those that do not. GSI will pick up those boxes that require microfilming from the Records Center.

NOTE: Following are new instructions in picking up boxes at the TSC.

Print the packing slip that was attached to the confirmation e-mail from the Records Center.

- Attach the packing slip to the boxes.
- Records Center will notify DTMB, Mail and Delivery Services that you have boxes
to be picked up.
    - Verify that the pick-up address and contact information on the packing slip is accurate.
        - If something on the packing slip needs to be corrected, please contact RMS at (517) 335-9132 or e-mail recordscenter@michigan.gov.
- DTMB, Mail and Delivery Services will pick up your boxes and will deliver them to the Records Center no earlier than 7 calendar days after the confirmation e-mail is sent
    - Contact recordscenter@michigan.gov:
        - If your boxes will not be ready for pick-up within 7 calendar days
        - If you need to make special arrangements for pick-up
    - Do not contact Records Center if the 7 calendar day schedule meets your needs
    - If you are sending six or more boxes, your shipment is considered freight. Please enter the account code information on the packing slip prior to pick-up.
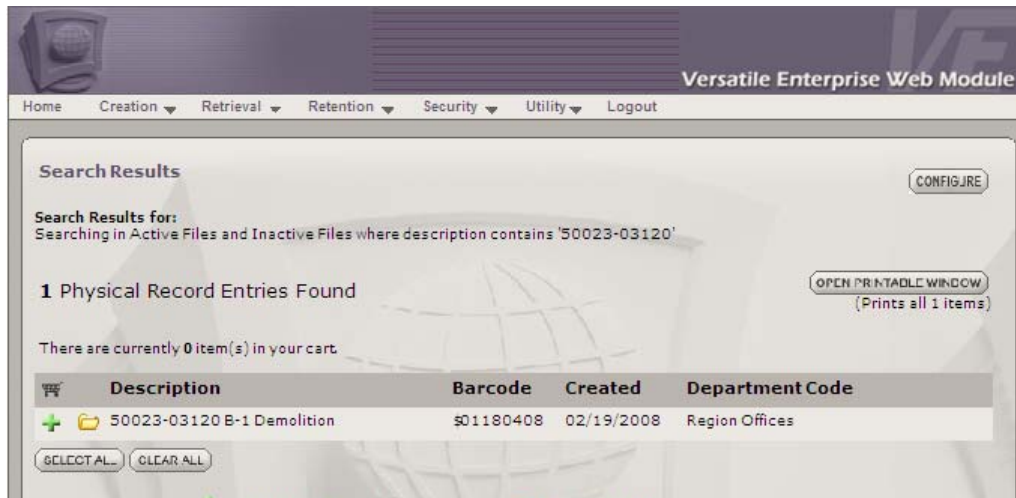
Searching and Retrieving Files and Boxes
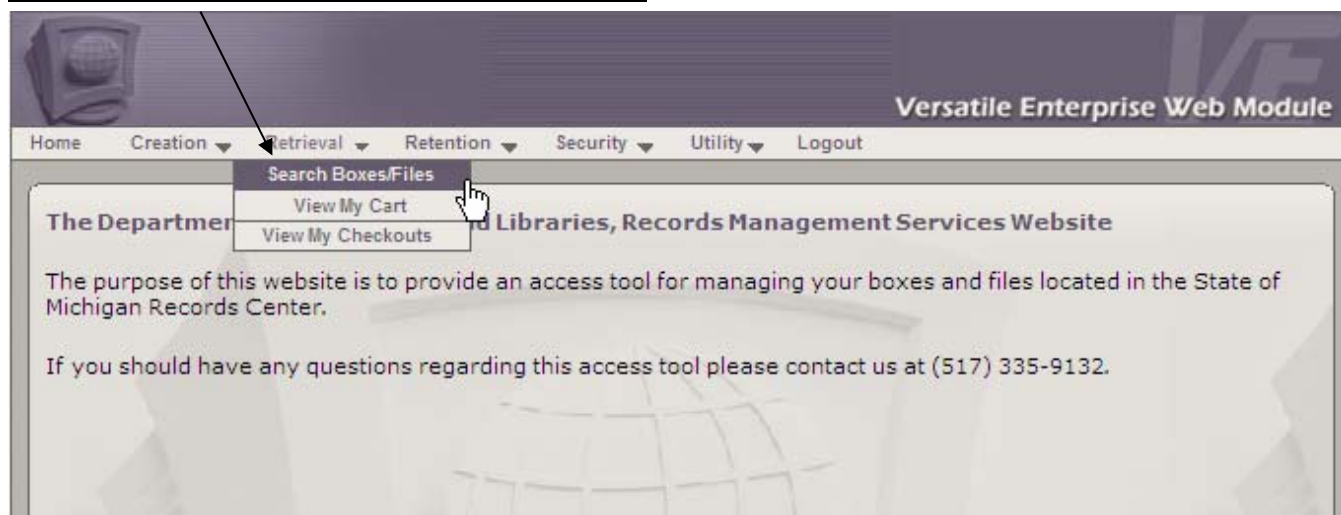
To search for and request boxes in Versatile, click on the "Retrieval" dropdown menu and select "Search Boxes/Files".
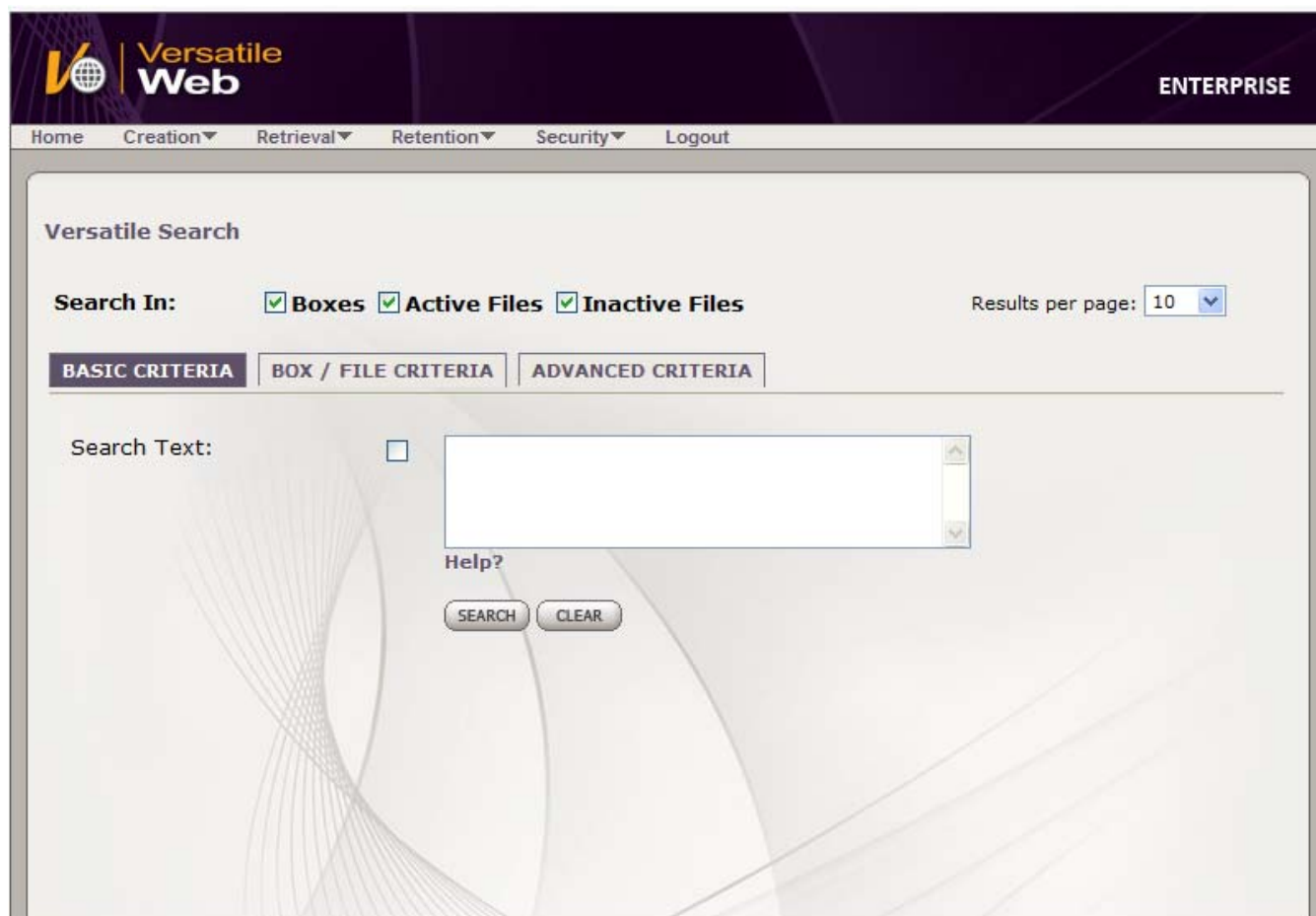
The most frequent place you'll probably search is on the Basic Criteria tab. When searching here, be sure if you're looking for a project such as "82122-45705A", you type it all ways it could have been typed to increase the chances of finding what you are looking for. Also, make sure you have "Boxes", "Active Files" and "Inactive Files" checked.

When your search produces a listing, it will look like this:
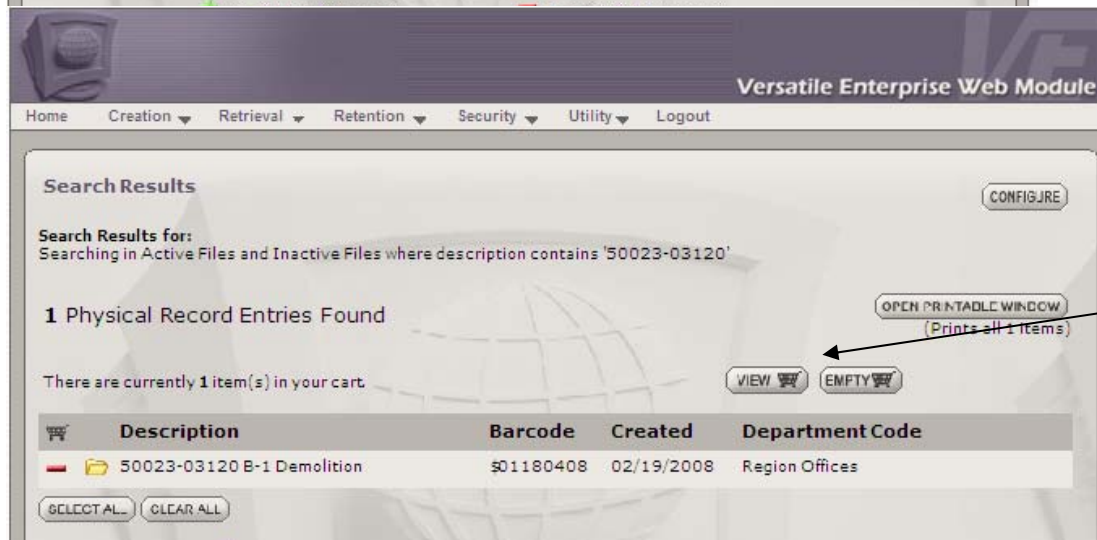
A green plus sign means the record available.

To request that file/box, click on the plus sign and it will be added to your cart.
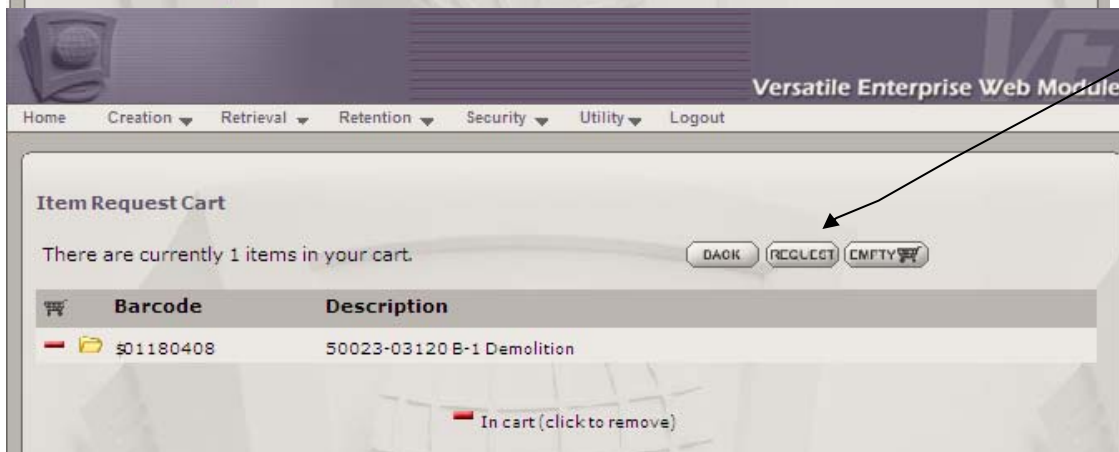
The plus will be replaced with a red minus.

Click on view cart to see what records you are requesting.

To complete your request, click the request button.

Records Center Disposal

Twice a year the Records Center queries Versatile to identify boxes that have fulfilled their retention requirements, and are eligible for destruction. Disposal notices are generated as a result of the queries. The notices will be sent to the RMCs at Construction Field Services for review and approval, prior to removing the boxes from the Records Center. The RMCs will contact the appropriate TSC before approving destruction of any projects. 30 days are allowed for reviewing disposal notices. Questions about disposal notices should be directed to the RMCs at Construction Field Services.

Frequently Asked Questions

Q: What is my department code?
A: For all MDOT TSCs the department code is /59/DIS/.

Q: What is the records series number?
A: This is the code that is listed on your Retention and Disposal Schedule to identify each records series. Each container in Versatile must be linked to a records series to identify its approved retention period. Each container can only contain one records series.

Q: What are the "content dates"?
A: Please use this field to input the beginning and ending dates for the contents of each file or Box as previously described on page 13.

Q: What is the "Description" field for?
A: This field is used to describe the contents of a container. It may be a summary description (Especially if each file will be itemized separately), or it may be very detailed.

Q: Should I prepare a list of the contents of each box and file before I begin Versatile, or should I input directly from the box?
A: Copying the information from a spreadsheet is faster and easier or you can input the information directly from the box.

Q: Can I fix mistakes before I submit a container?
A: Yes. Just edit the information on the screen. (See page 15)

Q: Can I fix mistakes after I submit a container?
A: Yes. Please send an e-mail message to the Record Center (recordscenter@michigan.gov) and they will correct the mistake for you. (See page 16)