

Content Manager

For

Record Center Training Manual

Content Manager for Records Center

State of Michigan

Records Management Services

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Introduction and Prerequisites

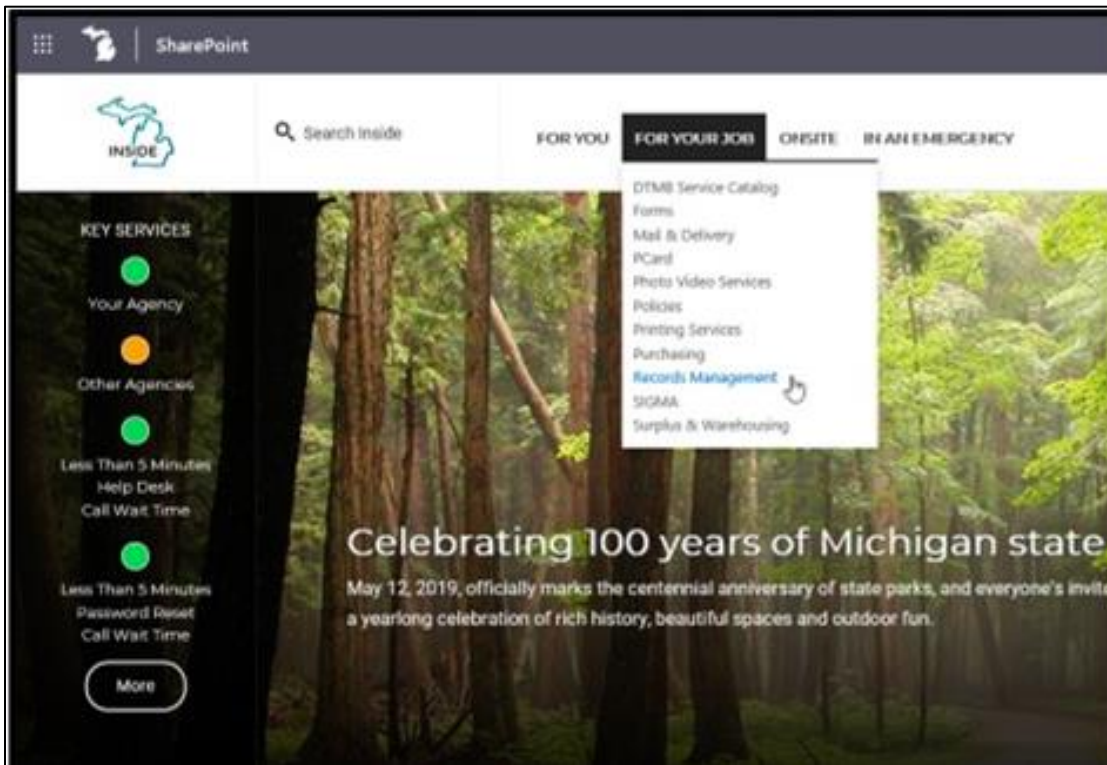
Welcome to the Content Manager for Records Center training manual, presented by the Department of Technology Management and Budget, Records Management Services.

This manual is intended for employees who will be using the State of Michigan Records Center to store and retrieve physical records.

This manual focuses primarily on the functionality of the Content Manager software, but that's not all you should know before you use these services. This manual assumes that you're familiar with basic records management concepts, and that you have read and are referencing your agency's Retention and Disposal Schedule.

This information is important when using Records Center services because your data entry is used to calculate how long records are retained, and incorrect information could result in records being destroyed too soon.

You will also need to know how to order, assemble, and pack a new Records Center box. It's important to use the correct box type and pack them according to specifications so that they will fit on Records Center shelving. Incorrect boxes will not be accepted.









If you're new to using the Records Center or just want a refresher, there are several resources available through the Records Management Services intranet site to get you up to speed.

To get to the Records Management Services intranet page, go to the State of Michigan's Intranet SharePoint page, inside.michigan.gov. Go to the "For Your Job" menu, and select "Records Management".

Records Management Resources

Search...

 <p>Records Retention and Disposal Schedules</p> <ul style="list-style-type: none"> • Agency-Specific Schedules • General Schedules 	 <p>Electronic Document Management</p> <ul style="list-style-type: none"> • Content Manager for EDM • Manuals and Cheat Sheets 	 <p>Records Center: Storage and Retrieval</p> <ul style="list-style-type: none"> • Content Manager for Records Center • Boxes • Forms, Manuals, Guides
 <p>Guidance</p> <ul style="list-style-type: none"> • Imaging, Microfilm • Confidential Records Destruction • Email Management • Recordkeeping Issues • Electronic Records 	 <p>Training</p> <ul style="list-style-type: none"> • Online Training • Live Training 	 <p>General Information</p> <ul style="list-style-type: none"> • Records Management Services • Records Management Officers

RMS Contacts

Records Management Services
 3433 N. Grand River Ave., Lansing, MI 48908
 517-335-9132
recordscenter@msischools.org

- RMS Contacts By Dept
- Records Management Officers (RMO)

Quick Links

- Content Manager for Records Center
- Michigan Compiled Laws - Records Management
- Michigan Scanning Standards
- Administrative Guide to State Government, Records Management

RM News

- Advice & Tips to Better Record Management

In the Quick Links menu on the right, you will find a link to the list of Records Management Officers for each department, and also a link to the Content Manager client for Records Center.

The Record Retention and Disposal Schedules link will take you to the full listing of agency specific and general schedules.

If you select Records Center, you will find all of the information you need to prepare and ship records to the Records Center, including ordering information for the correct boxes.

Visit the Training page to find links to records management training, including "Basic Records Management". This class is highly recommended to new employees and anyone responsible for recordkeeping.

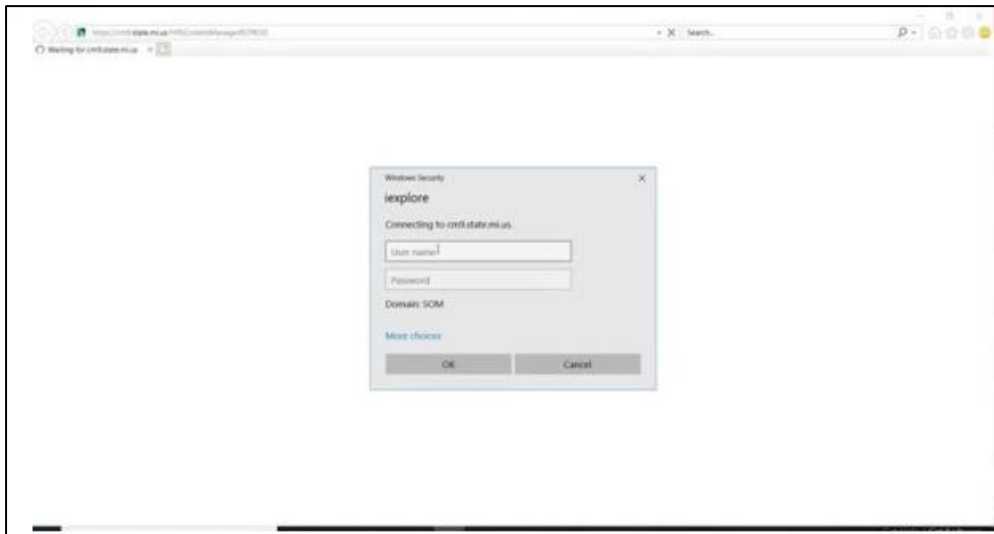
Accessing Content Manager

This module covers the process for accessing the Content Manager Software.

Content Manager is a web-based application that can be used with standard internet browsers. It is only accessible through the State of Michigan Intranet.

Access to Content Manager can only be requested by contacting your department's Records Management Officer (RMO). The current list of RMO's is available on the Records Management Services intranet site.

Content Manager uses your State of Michigan "SOM" domain username and password. For most users, this is the same account you use to log into Windows. Security in the system is specific to the logged in user. Sharing accounts and passwords is a violation of DTMB Administrative Policy 900.02.



The web address to access Content Manager is provided to you in your new user email, and is also available through the Records Management Services intranet site. It's recommended that you add this site to your favorites.

Once you click on the link to open the site, you'll be prompted for a username and password. As I mentioned before, you'll use your State of Michigan username and password here. For most of our users, this is the same username and password you use to log into your computer every day. Enter the information and click OK.

If you receive an error message or have any other difficulty logging in, please contact the Records Management Services Helpdesk by emailing RecordsCenter@Michigan.gov. Including a screenshot of your error and as much detail as you can provide will help our staff assist you more quickly.

Submitting New Boxes

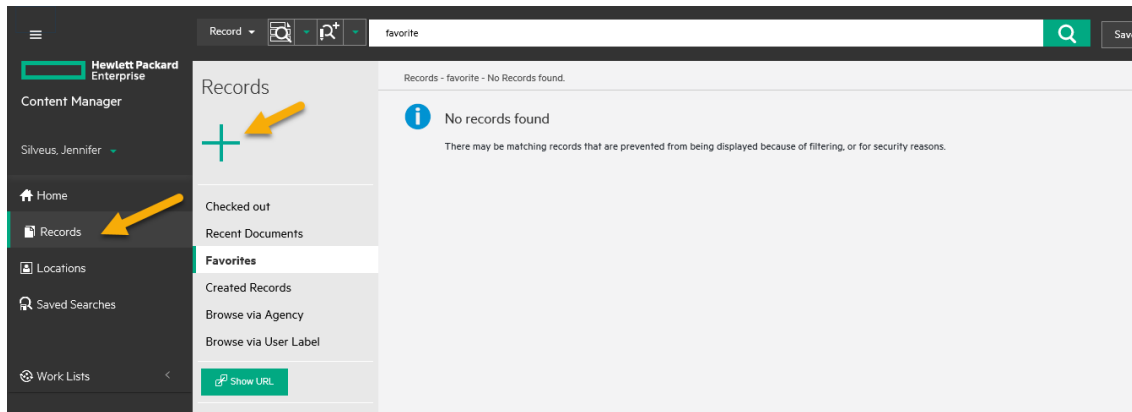
In this module, we will cover the steps of submitting new boxes to the Records Center.

Before submitting records to the Records Center:

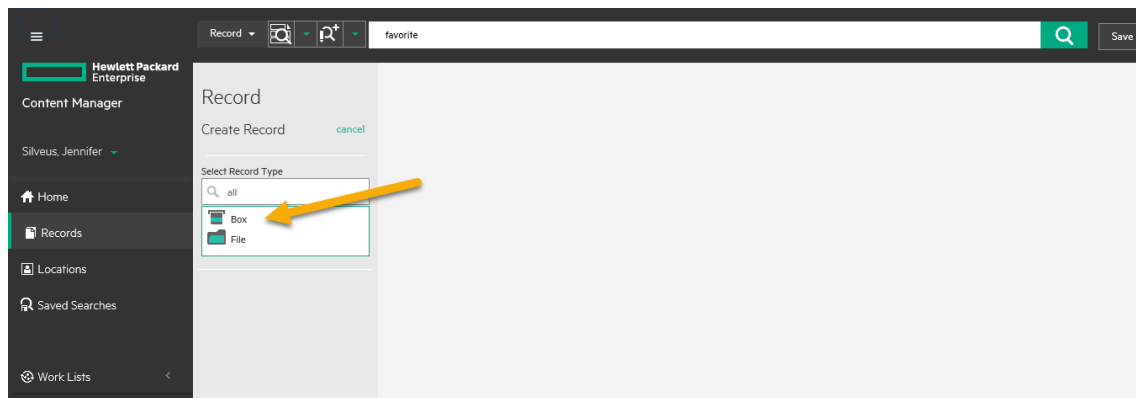
Make sure you are familiar with your retention and disposal schedule. These are available on the Records Management Services Intranet Site, or by contacting your department's Records Management Officer.

Then, make sure you have ordered the correct boxes and packed them in accordance with the instructions on the Records Management Services intranet site. Pack your boxes before entering them into the system to ensure that the data entry accurately describes the contents of each box.

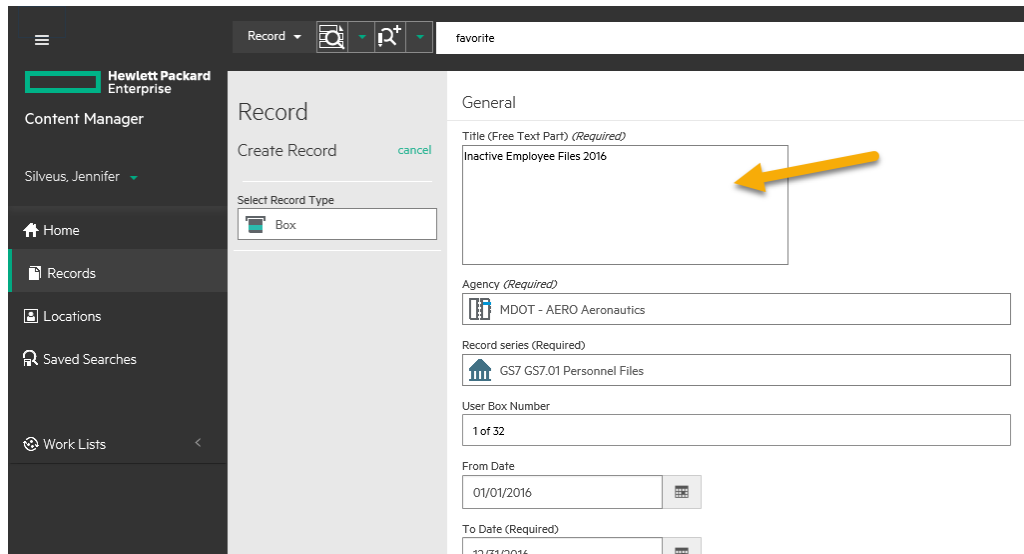




Each box of records you submit to the Records Center will need to be entered separately into Content Manager. Once you've logged into Content Manager, to create a new box, go to the "Records" button on the left side of the screen. Then, click on the large "+" sign icon.



This will open a dropdown screen asking you to "select Record Type". Since we're making a new box, we're going to choose "Box". Now you'll see several new data entry fields on your screen. We're going to walk through each one of them.



Record

favorite

Hewlett Packard Enterprise

Content Manager

Silveus, Jennifer

Home

Records

Locations

Saved Searches

Work Lists

Create Record cancel

Select Record Type

Box

General

Title (Free Text Part) (Required)

Inactive Employee Files 2016

Agency (Required)

MDOT - AERO Aeronautics

Record series (Required)

GS7 GS7.01 Personnel Files

User Box Number

1 of 32

From Date

01/01/2016

To Date (Required)

12/31/2016

The first field is the “Title”. This should be a unique description of what the box contains. A good title will help people in the future identify the box if they need to retrieve it. Enter a good title into the title field.

If you plan on “itemizing” your box by listing individual files, your box title may not need to go into as much detail. We will show you how to add individual files later. Also, this field has a limit of 255 characters.

Good Titles	Bad Titles
<ul style="list-style-type: none"> • Contracts 071B002378 – 071B018792 • Adams, Jamie through DeRose, Zane • FY 2015 Travel Owen - Ringo • 2016 Enforcement Files S-Z 	<ul style="list-style-type: none"> • Contracts • Files • Box 1 • Jenny’s Stuff • Records

The screenshot shows the 'Record' creation page in the Hewlett Packard Enterprise system. The left sidebar contains navigation links for 'Home', 'Records', 'Locations', 'Saved Searches', and 'Work Lists'. The main content area is titled 'Record' and includes a 'Create Record' button. Below this, there is a 'Select Record Type' dropdown menu with 'Box' selected. The 'General' section contains several fields: 'Title (Free Text Part) (Required)' with a text input box; 'Agency (Required)' with a dropdown menu that is open, showing a search bar with 'top' and a list of agencies including 'MDOT', 'MDOT - AERO Aeronautics', 'MDOT - ASD Accounting Services Division', 'MDOT - BHD Bureau of Highway Development', 'MDOT - DES Design Division', and 'MDOT - FAD208 Contract Services Division'. A yellow arrow points to the 'MDOT' option. Below the agency list are fields for 'Record series (Required)', 'User Box Number', 'From Date' (with a date picker), and 'To Date (Required)' (with a date picker). An 'Extended Description' field is also visible at the bottom.

Then move to the agency field. Clicking on the agency field with your mouse will bring up any department levels you have access to. In this example, I only have access to one department, which is what most users will have.

Click on the arrow icon to the right of the department name, to navigate to the agency levels you have access to. Again, many users will only have access to one agency. Select the agency that is applicable to the box you're creating.

Hewlett Packard Enterprise
Content Manager
Silveus, Jennifer
Home
Records
Locations
Saved Searches
Work Lists

Record
favorite

Record
Create Record cancel

Select Record Type
Box

General

Title (Free Text Part) (Required)

Agency (Required)
MDOT - AERO Aeronautics

Record series (Required)
MDOT - AERO

MDOT - AERO 39816 Airport Construction Project Records (supersedes item #2906)
MDOT - AERO 39817 As Constructed Airport Plans and Airport Layout Plans (supersedes item...)

User Box Number

From Date
MM/DD/YYYY

To Date (Required)
MM/DD/YYYY

Extended Description

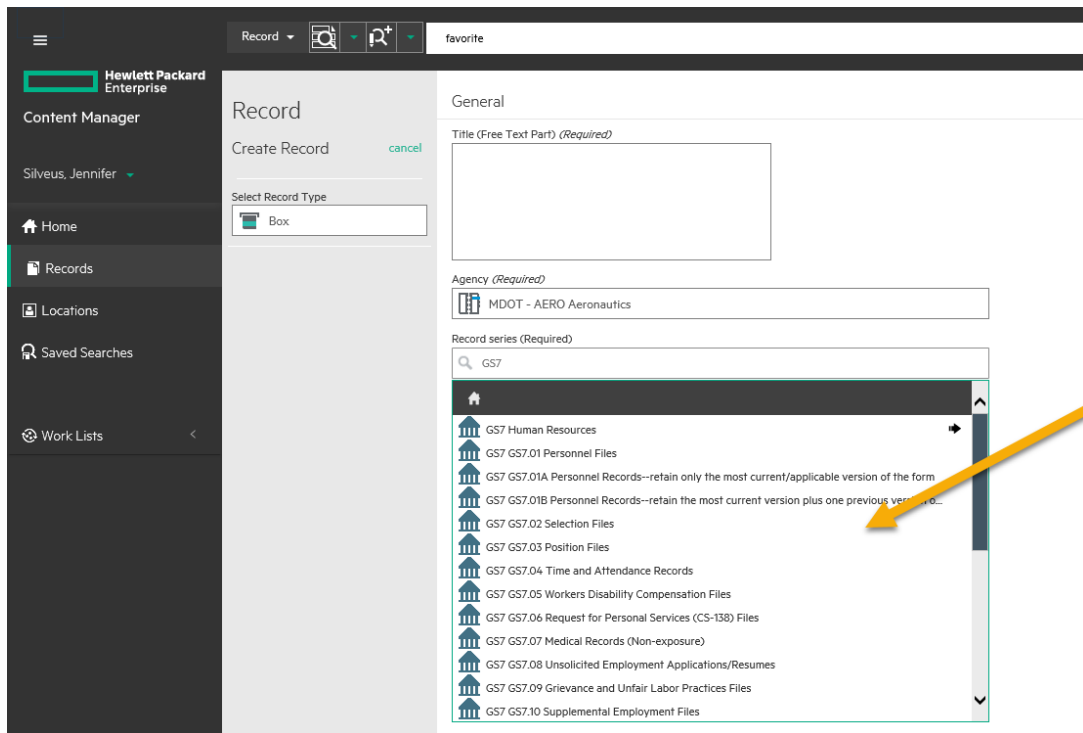
Now we'll enter the record series.

To bring up a list of agency specific record series for the agency you have selected, enter the department and agency acronyms exactly as shown in the agency field. In this example, I am going to enter "MDOT (space, dash, space) AERO (Space)". This will bring up a list of series for my agency and I will just select the one I need.

Alternatively, if I know the series number from my retention and disposal schedule (Example: 39816), I can simply type the series number into the record series field, and then select it when it pops up. It's important that the agency prefix for the series you select matches the agency you selected in the previous step. If these don't match, you will be contacted by Records Management Services so that they can work with you to select the correct information. The exceptions to this rule are General Schedule series.

The screenshot shows the 'Record' creation page in the Hewlett Packard Enterprise Content Manager. The interface includes a sidebar with navigation options like 'Home', 'Records', 'Locations', 'Saved Searches', and 'Work Lists'. The main area is titled 'Record' and contains a 'Create Record' button. Below this, there is a 'Select Record Type' dropdown set to 'Box'. The 'General' section contains several required fields: 'Title (Free Text Part)', 'Agency' (set to 'MDOT - AERO Aeronautics'), 'Record series' (with a search input 'none' and a dropdown menu open), 'User Box Number', 'From Date', and 'To Date'. The dropdown menu for 'Record series' is open, showing 'None of the Above' as the selected option, highlighted with a yellow arrow.

Only series currently in use by the agency for sending items to the Records Center are listed. Not every series on your agency's retention and disposal schedule may be listed. If you are unable to find the correct series for your records, you may use the "None of the Above" series. You can pull this up by searching in the series field for "None of the Above". Selecting this series will prompt staff at Records Management Services to contact you and provide assistance.



If you need to submit boxes under General Schedule item numbers, you'll search for those a little differently. For the full list of General Retention and Disposal Schedule, see the Records Management Services intranet site.

In the Record series field, type "GS" and the number for the general schedule you need to use. For example, if I type "GS7", I will see all of the item numbers for General Schedule number 7 for Human Resources records. I can then select the correct series from the list.

Or, as shown in the agency specific example, I can search for the item number, in this case "GS7.05". Make sure you select the series from the list to correctly populate the field.

The screenshot shows the 'Record' creation page in the Hewlett Packard Enterprise Content Manager. The left sidebar contains navigation options: Home, Records, Locations, Saved Searches, and Work Lists. The main content area is titled 'Record' and includes a 'Create Record' button and a 'Select Record Type' dropdown menu with 'Box' selected. The 'General' section contains several required fields: 'Title (Free Text Part) (Required)', 'Agency (Required)' (MDOT - AERO Aeronautics), 'Record series (Required)' (GS7 GS7.01 Personnel Files), 'User Box Number' (1 of 32), 'From Date' (MM/DD/YYYY), and 'To Date (Required)' (MM/DD/YYYY). An 'Extended Description' field is also present at the bottom. A yellow arrow points to the 'User Box Number' field.

If you wish, you may enter a “User Box Number”. This field is not required, but some offices find it useful to give the box a number within a single submission. For example, let’s say this is box “1 of 32”, because I’m working on a set of 32 boxes to send.

Hewlett Packard Enterprise
Content Manager
Silveus, Jennifer

Record

Create Record [cancel](#)

Select Record Type
Box

General

Title (Free Text Part) (Required)
Inactive Employee Files 2016

Agency (Required)
MDOT - AERO Aeronautics

Record series (Required)
GS7 GS7.01 Personnel Files

User Box Number
1 of 32

From Date
01/01/2016

To Date (Required)
12/31/2016

Extended Description

Next we're going to enter the dates of the content of the box. The "From Date" is not required, but might assist with search and retrieval in the future. The "To Date" is a required field. Depending on the disposal triggers defined for the series in your retention and disposal schedule, this date may determine how long the records will be retained at the Records Center before they come up on a disposal notice. So, it's important that these dates be entered accurately.

Record favorite

Hewlett Packard Enterprise

Content Manager

Silveus, Jennifer

Home

Records

Locations

Saved Searches

Work Lists

Record

Create Record [cancel](#)

Select Record Type

Box

General

Title (Free Text Part) (Required)
Inactive Employee Files 2016

Agency (Required)
MDOT - AERO Aeronautics

Record series (Required)
GS7 GS7.01 Personnel Files

User Box Number
1 of 32

From Date
01/01/2016

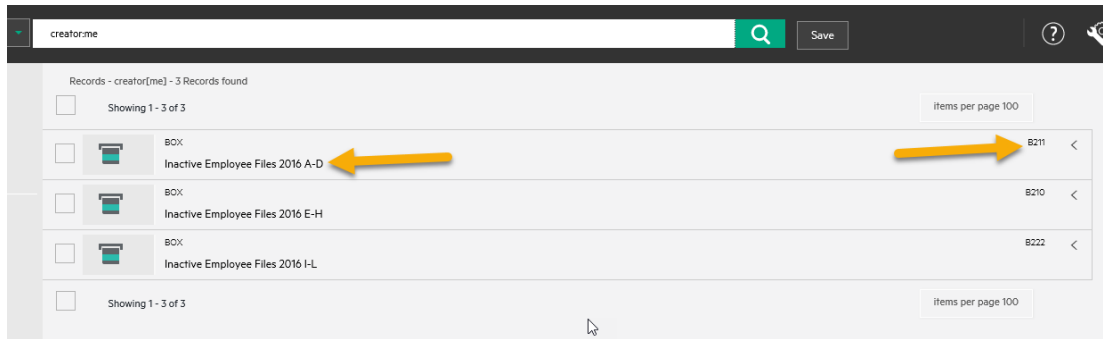
To Date (Required)
12/31/2016

Extended Description

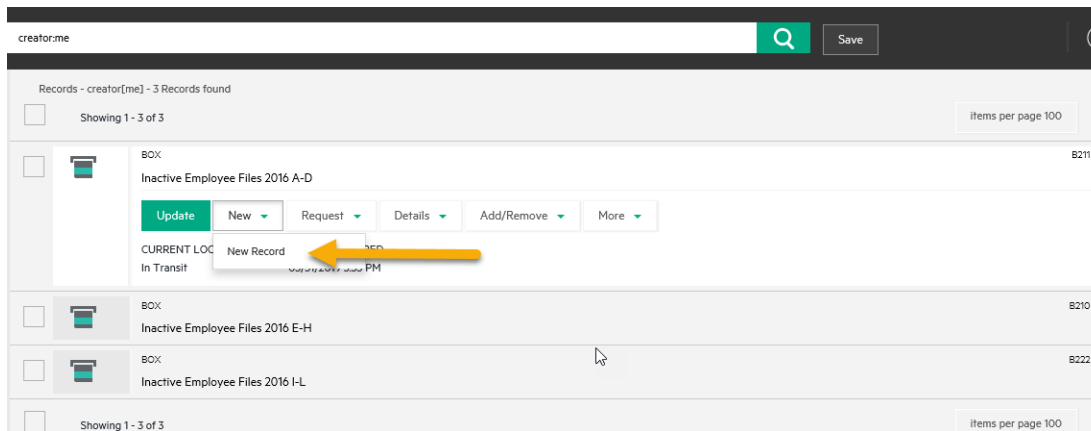
Save Cancel

If 255 characters wasn't enough room to describe the contents of your box, you can use the "Notes" field to enter an extended description.

Now that we've entered all of our data, take a last look to make sure we don't have any typos or mistakes. When you're confident that everything is accurate, click the "Save" button once.



It may take a second to process, and then you will be taken to a page displaying items you've recently created. Your new box will be listed at the top. You can see the title of the box here, and in the top righthand corner, you can see the box number that has been issued for this box. This is the number that will appear on the label that will be sent to you to place on this box.



If you wish to add individual file level detail to your boxes, you can create files within the box. Files must be added to a box on the same business day as the box was created. To add a new file, go to the box you just created and click the "New" button. Select "New Record" from the dropdown.

Record creator.me

Record

Create Record cancel

Select Record Type

File

General

Title (Free Text Part) (Required)
Jamie Adams

From Date
MM/DD/YYYY

To Date
MM/DD/YYYY

Box (Required)
B211 Inactive Employee Files 2016 A-D

Now, when prompted to select the record type, choose “File”. Now we will enter information for the first file in our box. We will give our file a title that is unique and specific, and will assist the Records Center staff in locating the file in the box if it ever needs to be retrieved. In this example, this file is for Jamie Adams. The “From Date” and “To Date” for files is not required, but can help staff who may be searching in the future, especially if you are likely to have multiple files with the same name. The “Box” field is automatically completed for you. When you are finished, click Save to complete. You will be taken back to the screen showing items you’ve recently created. To add another file to the box, go back up to the box and repeat the previous steps.

Again, once you click “Save” you’ll be unable to make changes to a created item. Please contact Records Management Services if you need to make corrections.

Once you’ve clicked the “Save” button to finish creating your box, you will be unable to make any changes to the box. If you notice you have made a mistake during data entry, or if you accidentally enter the same box multiple times, please email our helpdesk RecordsCenter@michigan.gov for assistance. Including the box number in your email will help staff identify your issues and make corrections faster.

After you submit your boxes, you’ll receive a confirmation email in approximately 1-2 business days letting you know that your boxes and files have been reviewed and accepted. If you would like printable labels for your individual files, you may request them by responding to the confirmation email.

You’ll receive a barcoded box label to apply to each box you’ve submitted. These are sent via ID mail or US mail, and typically take 1-2 business days after you receive the confirmation.

Place the labels on the corresponding boxes in the designated location, and seal the boxes as shown. For more information on properly packaging Records Center boxes, see the [training video](#) on the Records Management Services intranet site.



Contact Records Management Services by emailing RecordsCenter@Michigan.gov if you do not receive your labels, lose or destroy any labels, or if you have extra labels you do not need. It is extremely important that you never make copies of labels. The unique number assigned to each box is the only way the Records Center can locate your records. Duplicating labels will cause records to become lost.

To Ship new boxes to the Records Center, print the packing slip from your confirmation email. Confirm the address information on the slip is correct, and attach a copy of the slip to each box. For shipments of five or fewer boxes, you can simply send them via ID mail. For shipments of six or more boxes, a freight pickup will be scheduled with mail and delivery services on your behalf for between 7 and 10 business days. Additional detail for shipping boxes is included in your confirmation email.

Please ship your boxes to the records center within 30 days of receiving your labels. Records Center staff will contact you if we do not receive boxes within 30 days. If we do not receive your boxes within 90 days, your labels will be removed from the system and the boxes will need to be re-submitted.



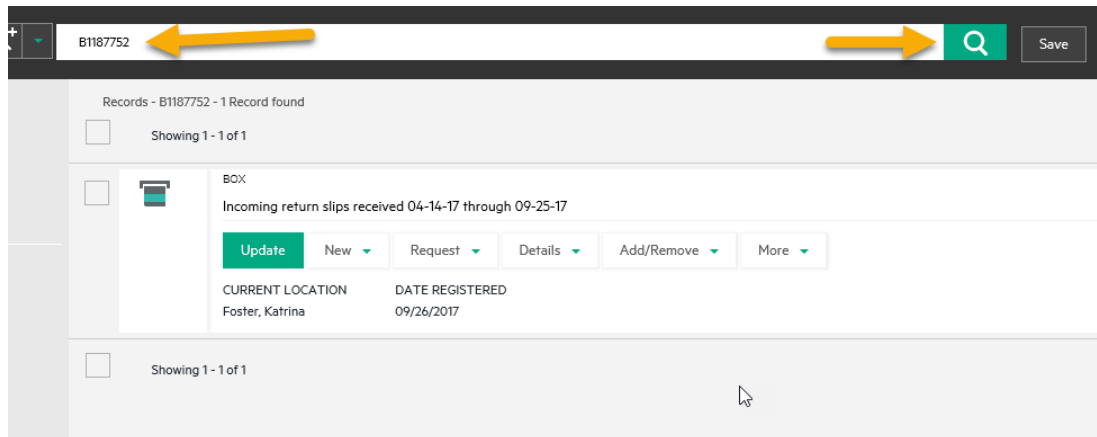
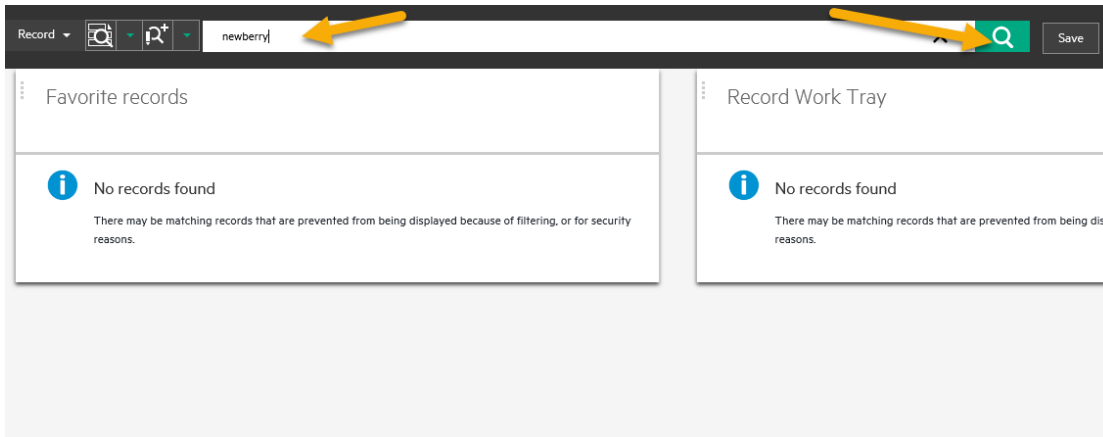
Searching for Boxes or Files

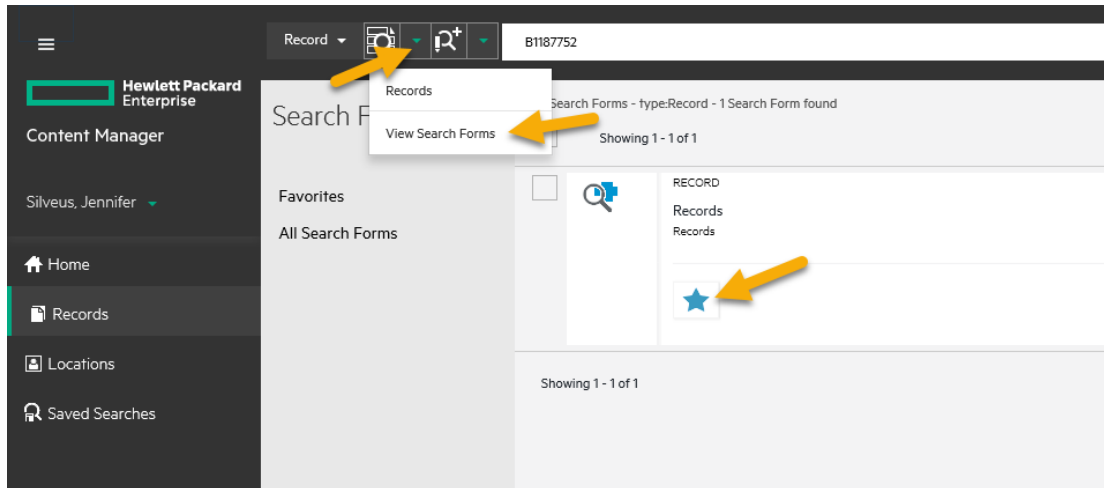
This module will cover searching for boxes and files from the Records Center and navigating your search results.

To search for boxes or files, you may use different methods depending on what information you know about the records you are looking for. If the person who originally submitted the records used good titles, searching for items will be much easier.

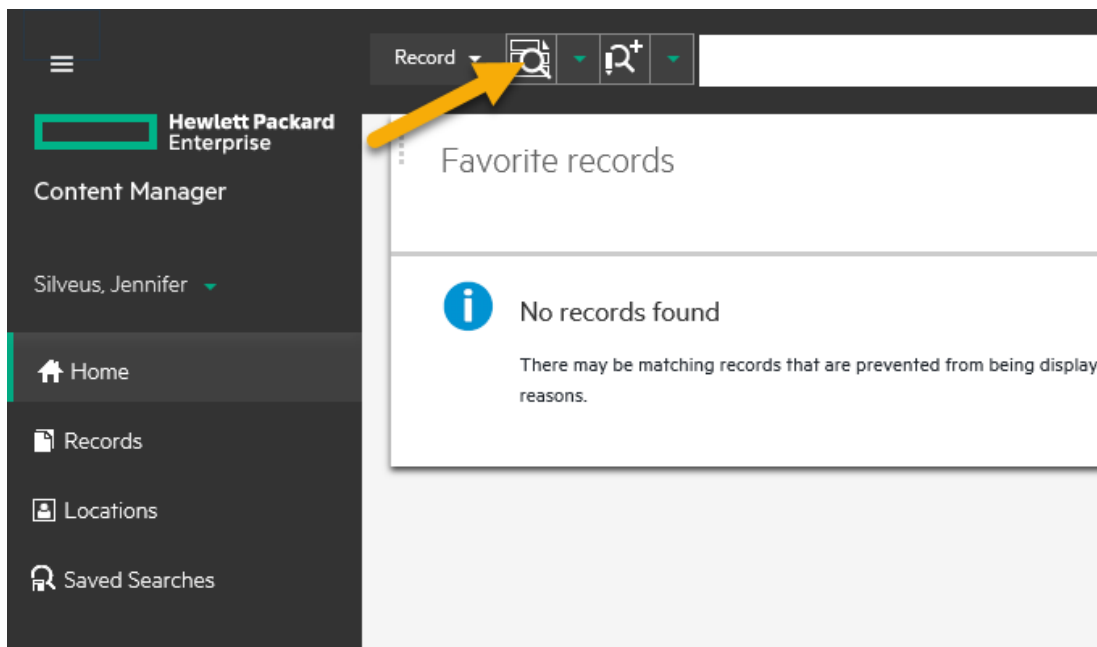
If you know key words in the Title of the box or file that you are looking for, you may enter it in the search bar at the top of the screen and hit “Enter” on your keyboard, or click the magnifying glass icon to run your search.

If you know the Records Center box number or file number for the item you’re looking for, you may search in the search bar as well. Numbers issued to boxes and files in the previous Versatile system were migrated over to Content Manager. However, all boxes now begin with a letter “B” and files with a letter “F”. So, if you have older documents or notes that refer to these numbers, simply add the B or F to the beginning of the number.





If you want to search for items based on criteria other than the title or the Record Number, you can use the Search Form function. The first time you want to use the search form, you need to make the form your “favorite”. To do this, go to the dropdown at the top for “Search Form Options”, then click “View Search Forms”. On this screen, click the star icon to make this search form your favorite. You only need to do this once the first time you use it. In the future, it will be set as soon as you log in.



Now, when you want to use the search form, just click on the Form Search icon at the top of the screen to open it. In the future, you can go right to this button, because you have already set it as your favorite.

Form Search

Methods ▼

Title Word

Record Number

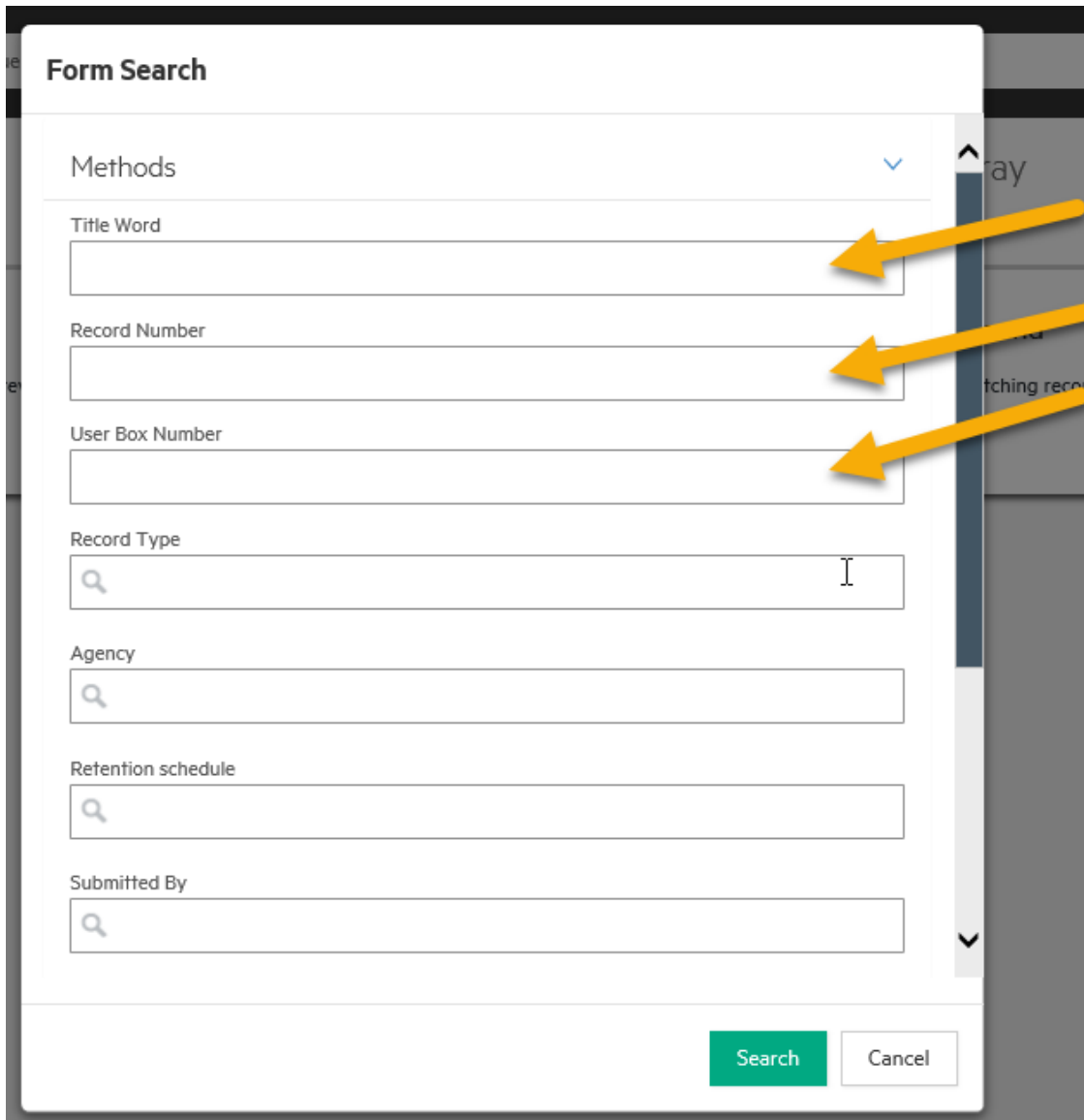
User Box Number

Record Type

Agency

Retention schedule

Submitted By



We're going to go through each of the search fields available on this form. You may use one or more criteria for your search. When searching, it's important to note that most search values are only associated with boxes, not files. If you are searching for individual files, you will only get search results by using the "Title", "Record Number", or "Current Location" fields.

You can search by "Title Word" or "Record Number" on this screen, just like we did from the search bar we reviewed earlier.

If your boxes use a "User Box Number" that you know, you may enter it in the "User Box Number" field.

Click "Search" to get your results.

Form Search

Methods ▼

Title Word

Record Number

User Box Number

Record Type

Agency

Retention schedule

Submitted By

The “Record Type” field allows you to select whether you are searching for a box or a file. Type the word “Box” or “File” and select the type from the menu. This works best if you combine it with other search criteria below, so you aren’t just searching for all of the boxes or files you have access to.

Form Search

Methods ▼

Title Word

Record Number

User Box Number

Record Type

Agency

🏠 > DTMB
📁 DTMB - BOD Building Operations Division
📁 DTMB - RMS OSS Records Management Services

Retention schedule

Search

Cancel

Searching by “Agency” can be useful if you have access to multiple agencies and want to narrow your search down. Clicking on the agency field with your mouse will bring up any department levels you have access to. In this example, I only have access to one department, which is what most users will have.

Click on the arrow icon to the right of the department name, to navigate to the agency levels you have access to. If you have access to multiple agencies, selecting a specific one will filter your search. If you only have access to one agency, as many users do, this search will not filter your results.



Form Search

Methods 

Title Word


Record Number

User Box Number


Record Type

Agency

Retention schedule



 DTMB - RMS 38545A Retention and Disposal Schedules (supersedes item #24472)

 DTMB - RMS 38546 Record Studies Files (supersedes item #24476)

Search

Cancel

Searching by “Retention Schedule” is a good place to start if you’re not sure what has been sent to the Records Center, or if you’re not sure of how boxes have been titled.

To bring up a list of agency specific record series for the agency you have selected, enter the department and agency acronyms exactly as shown in the agency field. In this example, I am going to enter “DTMB (space, dash, space) RMS (Space)”. This will bring up a list of series for my agency, and I will just select the one I need. Alternatively, if I know the series number from my Retention and Disposal Schedule, I can simply type the series number into the record series field, and then select it when it pops up. Only agency specific series that have boxes associated at the Records Center are listed in Content Manager.

Form Search

Methods ▼

Title Word

Record Number

User Box Number

Record Type

Agency

 DTMB - RMS OSS Records Management Services

Retention schedule

  GS6 GS6.02 Journal Vouchers

Search

Cancel

If your agency uses General Schedule item numbers, you'll search for those a little differently. For the full list of General Schedules, see the Records Management Services intranet site.

In the Retention Schedule field, type "GS" and the number for the general schedule you need to use. For example, if I type "GS6", I will see all of the item numbers for General Schedule #6 for Accounting and Purchasing records. I can then select the correct series from the list.





Or, as shown in the agency specific example, I can search for the item number, in this case "GS6.02". Make sure you select the series from the list to correctly populate the field.

Form Search

Agency

Retention schedule

Submitted By

- 
-  Payne, Rebecca
-  Payne, Sue
-  Xpayne, Diana

Legacy Submitted By

Current location

Search

Cancel

The next few fields are associated with user information. The “Submitted By” and “Legacy Submitted By” are the user that originally submitted the box to the Records Center. The “Submitted By” field only applies to boxes submitted since the migration to Content Manager in June 2019. The “Legacy Submitted By” field is associated with boxes sent prior to that date. If you’re not sure when the box was sent, you may need to search in both fields, one at a time, to see all of the results. The “Current Location” field will return any boxes or files that are in the custody of that person, meaning they have requested the item and it has not been returned to the Records Center.

To search in any of these fields, start by entering the last name of the person you wish to search by in the field, and scroll down the menu to select the correct person. I’m going to enter “Payne”, and select Sue Payne from the list. Some user names may contain an extra “x”, this was used in the previous system to indicate inactive users, but they still may have boxes associated with them. If you want to search for yourself, simply type “Me” (M,E) in the field.

Form Search

Agency

Retention schedule

Submitted By

Legacy Submitted By

Current location

Notes Word

Dates



Search

Cancel

The "Notes Word" field will search by keywords in the "Notes" extended description field. For boxes migrated from the former Versatile system, any descriptions longer than 255 characters will be searchable through this field, not the "Title" field. Simply type your keyword into this field.

Form Search

Current location

Notes Word

Dates



From Date

From

To Date

From

Date Submitted

From



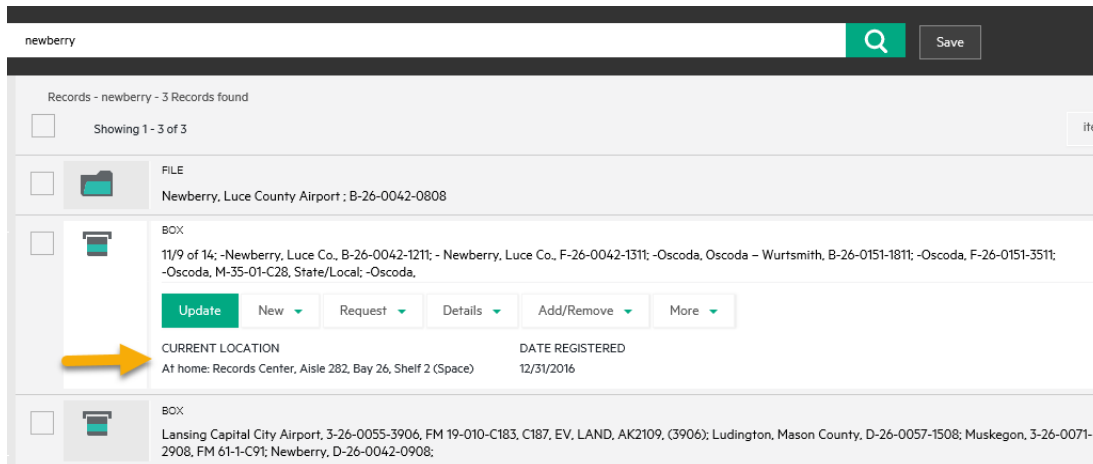
Search

Cancel

To search by dates associated with a box, click the arrow next to “Dates” to expand the form. Here you may enter date ranges for the “From Date”, “To Date”, or “Date Submitted” fields. You may key the dates in or use the calendar icon to select the date from the calendar view. For example, I’m going to search for a “Date Submitted” between January 1st, 2015, and January 1st, 2018, and click “Search” to get my results.



Next we'll take a look at how to view and navigate the results of your search. Depending on how you searched, you may get both boxes and files listed on your results. Whether an item is a box or file is indicated by differently shaped teal icons, and the word "Box" or "File" in the top left corner of the Item. Below this, the Title of the item is displayed. The Record Number is displayed in the top right corner of the item.



Clicking on the item will display additional information and functional buttons. The "Current Location" of the item shows if it is "at home" in the Records Center, or if it is currently located with a user who has requested it.

The screenshot shows a web application interface for records management. At the top, there is a search bar with the text "newberry" and a "Save" button. Below the search bar, the main content area is divided into two sections. The left section displays a list of records, with the first record selected. The right section is a detailed properties pane for the selected record, titled "Select properties".

Records - newberry - 3 Records found

Showing 1 - 3 of 3

FILE
Newberry, Luce County Airport ; B-26-0042-0808

BOX
11/9 of 14; -Newberry, Luce Co. B-26-0042-1211; - Newberry, Luce Co. F-26-0042-1311; -Oscoda, Oscoda - Wurtsmith, B-26-0075-2011; M-35-01-C28, State/Local; -Oscoda.

Update New Request Details Add/Remove More

CURRENT LOCATION DATE REGISTERED
At home: Records Center, Aisle 282, Bay 26, Shelf 2 (Space) 12/31/2016

BOX
Lansing Capital City Airport, 3-26-0055-3906, FM 19-010-C183, C187, EV, LAND, AK2109, (3906); Ludington, Mason Cou 2908, FM 61-1-C91; Newberry, D-26-0042-0908;

Showing 1 - 3 of 3

Select properties

Agency:
MDOT - AERO Aeronautics

Date Submitted:
Saturday, December 31, 2016

From Date:
Saturday, January 1, 2011

Notes:
11/9 of 14; -Newberry, Luce Co. B-26-0042-1211; - Newberry, Luce Co. F-26-0042-1311; -Oscoda, Oscoda - Wurtsmith, B-26-0151-1811; -Oscoda, F-26-0151-3511; -Oscoda, M-35-01-C28, State/Local; -Oscoda, Oscoda - Wurtsmith, B-26-0151-2111; -Owosso, Owosso Community, F-26-0075-2011; -Plymouth, Canton Plymouth, B-26-0077-1711 (1 of 2); - Plymouth, Canton Plymouth, B-26-0077-1711 (2 of 2); -Pontiac, Oakland Co. Int'l, D-26-0079-7011; - Plymouth, Canton Plymouth, F-26-0079-7111

Retention schedule:
39816 MDOT - AERO 39816 Airport Construction Project Records (supersedes item #2906)

Notes: These records document the monitoring and coordination of construction of and improvements to airports. They may include correspondence, notice of intent, program change/allocation, lease, master plan, prepayment, proposal, justifications, certification of funds, grant and amendments, summary of project, advertising, recommendation and tabulation of bids, rejected bids and return of bid checks, wage rates, notice to contractors, request for approval and transfer of funds, bonds, liens, insurance, sub contracts, certificate of acceptance, inspection reports, as built plans, time schedules, diaries, costs resolution sponsors assurance, project statement, funds breakdown (federal, state, local), auditing reclaims, receipt vouchers, request for approval and transfer of appropriated funds, allotment adjustments, taxes, account ledger, final contractor affidavits, inter account bills, force account sheets, engineering costs statement, testing costs statements, Commission audit reports, authorizations to proceed, environmental impact statements, federal or state agency review summaries, archeological survey reports, materials reports, consultant contracts, attorney opinions, land description, appraisals, photographs, relocation plan, etc. ACT = until financial closeout of project.




Action Summary: Destroy 7 years after Date Submitted

Scheduled Disposal Method:
Destroy: Sunday, December 31, 2023

Submitted By:
Migration

To view more details about a selected item, the double arrow near the top right corner of the screen will open a window displaying more properties. If you need to view the Retention Schedule, From and To Dates, or any other fields not displayed by default, this window can be configured to show that information. For instructions on configuring this window, see the module “Configuring Properties Pane”.




If a box contains files that have been individually itemized in the system, the “Navigate To” button will be available. Click on this button and select “Contained Records” to view the files contained within the box.

<input type="checkbox"/>		BOX - PERM OUT 2017 Recertification Files
<input type="checkbox"/>		FILE - PERM OUT 235472 Memorial HC AUW311 10/31/16 (3/4)
<input type="checkbox"/>		FILE - NOT IN BOX 235472 Memorial HC AUW311 10/31/16 (4/4)

While searching and navigating, you may also encounter a few different types of items, indicated by different colored icons. A yellow box or folder indicates that the item has been permanently checked out to the person shown as the “Current Location”. A purple file indicates that the file was not located in the box when it was previously requested. This information can be useful to you when searching for an item, but because the item is not at the Records Center, you cannot submit a request through the system for it.

Records - newberry - 3 Records found

Showing 1 - 3 of 3

<input type="checkbox"/>	 FILE Newberry, Luce County Airport ; B-26-0042-0808			
<input type="checkbox"/>	 BOX 11/9 of 14; -Newberry, Luce Co., B-26-0042-1211; - Newberry, Luce Co., F-26-0042-1311; -Oscoda, Oscoda – Wurtsmith, B-26-0151-1811; -Oscoda, F-26-0151-3511; M-35-01-C28, State/Local; -Oscoda, <div style="display: flex; justify-content: space-between;">UpdateNewRequestDetailsAdd/RemoveMore</div> <table border="0"><tr><td>CURRENT LOCATION At home: Records Center, Aisle</td><td><div style="border: 1px solid gray; padding: 2px;">Retrieve - Temporary Show Requests</div></td><td>DATE REGISTERED 12/31/2016</td></tr></table>	CURRENT LOCATION At home: Records Center, Aisle	<div style="border: 1px solid gray; padding: 2px;">Retrieve - Temporary Show Requests</div>	DATE REGISTERED 12/31/2016
CURRENT LOCATION At home: Records Center, Aisle	<div style="border: 1px solid gray; padding: 2px;">Retrieve - Temporary Show Requests</div>	DATE REGISTERED 12/31/2016		
<input type="checkbox"/>	 BOX Lansing Capital City Airport, 3-26-0055-3906, FM 19-010-C183, C187, EV, LAND, AK2109, (3906); Ludington, Mason County, D-26-0057-1508; Muskegon, 3-26-2908, FM 61-1-C91; Newberry, D-26-0042-0908;			

Showing 1 - 3 of 3

Requesting and Returning Boxes or Files

This module will cover the process for requesting an item from the Records Center and returning it. Once you have located an item you wish to retrieve, click on it to display the functional buttons. Click the “Request” button and choose the option “Retrieve - Temporary” to open the Request window.

Request

Retrieve - Temporary

B1194010

11/9 of 14; -Newberry, Luce Co., B-26-0042-1211; - Newberry, Luce Co., F-26-0042-1311; -Oscoda, Oscoda – Wurtsmith, B-26-0151-1811; -Oscoda, F-26-0151-3511; -Oscoda, M-35-01-C28, State/Local; -Oscoda,

Home Location

Records Center, Aisle 282, Bay 26, Shelf 2 (Space)

Requested by

🔍 Silveus, Jennifer

Priority

Normal



Date required

MM/DD/YYYY hh:mm:ss



Notes

Save

Cancel

The Home and Requested By fields will already be populated. Leave your name as the “Requested By”, you do not have permissions to request on behalf of another user with this function. Now, select the priority for your request.

Normal priority is the default. These records will be shipped the next business day. The “Date Required” field is not used, please leave it blank.

Rush priority requests will ship the same business day if they are submitted by 1pm. Please use Rush priority with discretion.

Pick Up at Records Center allows you to come to the Records Center to pick up the items. If you select this option, you must include notes indicating the day and approximate time you plan to pick up the item. If the item will be picked up the same day, please call our office at 517-335-9132, after submitting your request, to ensure it is ready to pick up when you arrive. If a person other than yourself will be picking up the item, their name must be included in the request notes. Only State of Michigan employees from the same agency may take custody of or review items. The Records Center business hours are Monday to Friday, 7:30am to 4:30pm, excluding state holidays. All visitors must bring their State of Michigan ID.

If you need a specific file out of a box, but the file is not individually itemized already, submit the request for the entire box and indicate in the request notes the name of the file you need. Records Center staff will retrieve and send just the individual file, and create an itemized file in the system to track it.

If you need the item to be shipped to a user other than yourself, include the name and address information for that person in the notes. This person must be a state employee from the same agency.

If the item will not be sent back to the Records Center, enter “Perm Out” in the notes. Records Center staff will send a confirmation to you when the item has been updated to reflect Permanent Out status.

When your priority and notes are complete, click the “Save” button to complete the request. The item will briefly indicate a message that the request was created. Repeat these steps for each item you need to request. Do not use the system function for tagging and submitting multiple requests at once.

Once you click “Save”, you will not be able to edit the request. If you need to change or cancel your request, please email RecordsCenter@Michigan.gov . Your items will be shipped per your indicated priority and instructions, and will also include a return packing slip for your convenience when you return the item to the Records Center.

When returning items to the Records Center, use the return slip provided with your shipment and list the items you are sending on the slip.

A blank return slip template is available on the Records Management Services intranet site.

Do not remove, cover, cross off, or otherwise alter the barcode labels on your boxes or files. These are needed to check the items back into the Records Center.

If you are returning five or fewer boxes, you may send them via ID mail. To send larger shipments, email DTMB-mail-services@Michigan.gov to schedule a freight pickup.

If you will not be sending an item back, or are removing a file from a box before returning the box, email RecordsCenter@Michigan.gov .

Keyword Searching Tips		
Search Tip	Example Search	Example Results
1. Searching is not case sensitive	Compensation	Compensation compensation
2. Use wildcards	Comp*	Comp compensation
3. Use quotation marks for phrases	"Jones, Mary"	Jones, Mary
4. Use Commas to find instances of any word	Jones, Mary	Jones, Mary Albert Jones Mary Brown
5. Use 'and' for records that contain all terms	Mary and Jones	Jones, Mary Mary Jane Jones Jones College, 302 Mary St.

Keyword Searching Tips

Because you may not know how information was entered in the past, you may need to search Title keywords in a few different ways to get the results you're looking for. Content Manager uses specific search logic depending on how you enter your terms. It may take a bit of practice to get your search to return the results you are looking for, but these tips can be powerful tools once you learn to use them. You may never need to use any of these tips, depending on your records, but the five tips shown here may come in handy.

The screenshot shows a search results page with a search bar at the top containing the letter 'y' and a 'Save' button. Below the search bar, it indicates 'ords - newberry - 3 Records found' and 'Showing 1 - 3 of 3'. The main content area is divided into sections: 'FILE' with 'Newberry, Luce County Airport; B-26-0042-0808', 'BOX' with a list of records including '11/9 of 14; -Newberry, Luce Co., B-26-0042-1211; - Newberry, Luce Co., F-26-0042-1311; -Oscoda, Oscoda - Wurtsmith, B-26-0151-1311; -Oscoda, M-35-01-C28, State/Local; -Oscoda,' and 'Update' buttons, and 'CURRENT LOCATION' with 'At home: Records Center, Aisle 282, Bay 26, Shelf 2 (Space)' and 'DATE REGISTERED' with '12/31/2016'. A third section shows another 'BOX' with 'Lansing Capital City Airport, 3-26-0055-3906, FM 19-010-C183, C187, EV, LAND, AK2109, (3906); Ludington, Mason Cou 2908, FM 61-1-C91; Newberry, D-26-0042-0908;'. A 'Showing 1 - 3 of 3' indicator is at the bottom.

On the right side, a 'Select properties' panel is open, featuring a gear icon at the top. A yellow arrow points to this gear icon. The panel lists the following information:

- Agency: MDOT - AERO Aeronautics
- Date Submitted: Saturday, December 31, 2016
- From Date: Saturday, January 1, 2011
- Notes: 11/9 of 14; -Newberry, Luce Co., B-26-0042-1211; - Newberry, Luce Co., F-26-0042-1311; -Oscoda, Oscoda - Wurtsmith, B-26-0151-1311; -Oscoda, M-35-01-C28, State/Local; -Oscoda, Oscoda - Wurtsmith, B-26-0151-2111; -Owosso, Owosso Community, F-26-0075-2011; -Plymouth, Canton Plymouth, B-26-0077-1711 (1 of 2); - Plymouth, Canton Plymouth, B-26-0077-1711 (2 of 2); -Pontiac, Oakland Co. Int'l, D-26-0079-7011; - Plymouth, Canton Plymouth, F-26-0079-7111
- Retention schedule: 39816 MDOT - AERO 39816 Airport Construction Project Records (supersedes item #2906)

Configuring Properties Pane

When viewing search results, if you want to see additional properties for an item, you can click on the double arrow icon on the right-hand side of the screen to show the Properties Panel. The properties displayed for an item can be configured to display information that is the most useful to you. To select properties, click on the gear icon at the top of the pane.

Select Properties

Agency

Date Submitted

Notes

Retention schedule

Scheduled Disposal Method

Submitted By

Title

Access Control

OK

Cancel

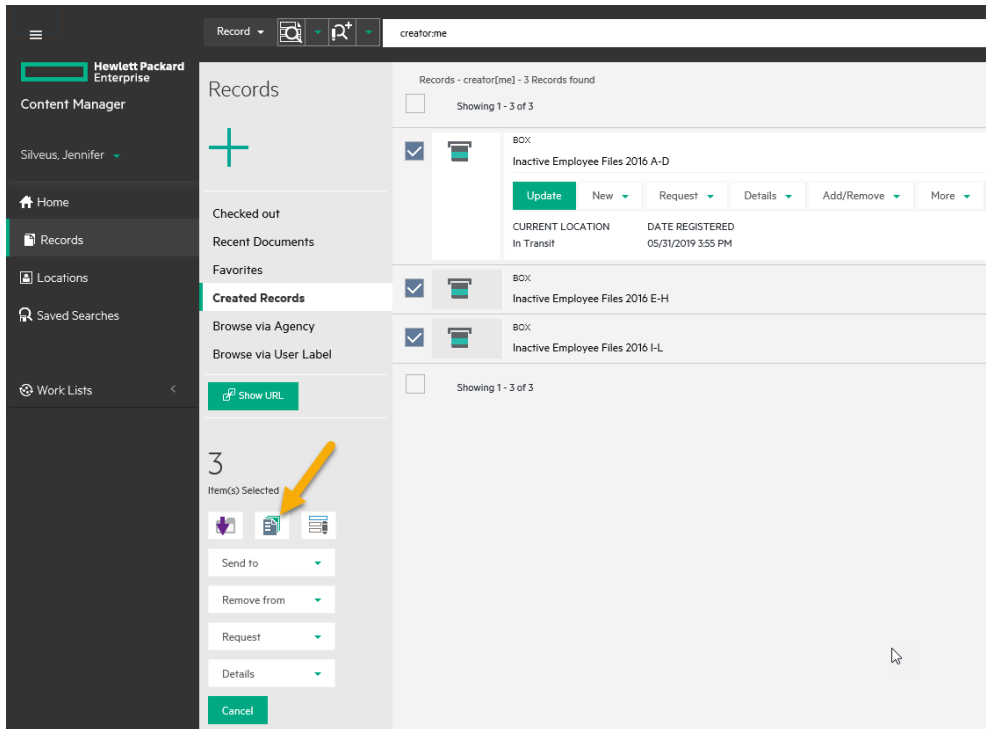
Then, scroll through the list of available properties and select the items you want displayed. When you're finished, click "OK". Only properties that contain data for the currently displayed record will show. Once you select your properties, they will remain for future sessions. You will need to set your properties separately for boxes and files.

The properties recommended to select for boxes are:

- Current Location
- Date Submitted
- From Date
- Legacy Submitted By
- Notes
- Retention Schedule
- Scheduled Disposal Method
- Submitted By
- Title
- To Date
- User Box Number

The properties recommended to select for files are:

- Container
- Current Location
- From Date
- Notes
- Title
- To Date



Reporting

Occasionally, you may want to generate a report of boxes to use outside of the system. After searching for or creating your boxes, select the boxes you want to send to your report by tagging them just to the left of the box icon. Then click on the “Show Reports” icon here.

Select the “Box Detail Report”, and click the “Report” button to generate. The report will be displayed in HTML format. You can print this page using your browser’s print function.

