STATE RECORDS CENTER
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Using the State Records Center and Infolinx

Best Practices for Packing Records Boxes

- Use Records Storage Cartons - 12"x15"x 10" (one cu.ft. boxes) for all records.
- Identify the Reference Number of the Records Series. Do not include any records which are not a part of the series.
- All records are recycled at the time of destruction. Boxes must contain only paper products. All non-recyclable items, i.e plastic binders, three-ring binders, etc. should be removed before transfer to the SRC. All microforms and audio cassette tapes are to be boxed separately from the papers records belonging to the series.
- Identify the boxes which contain microforms and audio tapes. These boxes will require special handling at destruction. Be sure to include notation of the format of the records in the field for the Box Description.
- Pack the records in the same order that they are filed in the office.
  - Records should be left in the folders; ring binders should be removed.
  - All folder labels should face the same direction.
- Letter size documents and folders should be placed facing the 12" box front.
- Legal size documents and folders should be placed lengthwise facing the 15" side of the box.
- Boxes should be packed to make good use of storage space; weighing 25-30 pounds.
- Leave a 1" to 1.5" clearance in each box - to facilitate reference and ease of retrieval and refilling.
- Place label on the front end of box in the lower left hand corner of box.

Looking Up Record Series Reference Numbers

1. Go to State Records Manual
2. Go to Infolinx - Home Page.
    - Click on the "Retention Schedules" tab.
    - Enter the agency/department.

A list of all agency record series titles and reference numbers will appear

For detailed retention schedule information – select specific series by filling in a check mark in front of the entry and clicking on the agency/department name.

Creating a New Box in Infolinx

1. Go to Infolinx - Home Page.

2. Click on the "Boxes" tab.

3. Click on the "New" tab on the "Action Button" line.

*Note – all fields marked with an * asterisk are required to create a new box.*

4. Enter the following information:

- Agency/Department. The first field should already show your agency's name.

- Division/Bureau. To enter the correct Division/Bureau, click on the drop down tab and choose the correct title.

- Box Number. Enter the box number on the "Agency Box Number" line. The agency box number assigned by the agency.

- Cut-off Date. Enter the Cut-off date; must be entered as an actual date.

Examples of records cut-off dates: end of calendar year, end of state fiscal year, end of federal fiscal year, closure of a file, etc. If you are unsure of the cut off date to be used for the records, check the records retention schedule for the cut-off date; to locate the record schedule information in infolinx scroll to the bottom of the page to Record Schedule Information and on the "Search Here" line enter the Agency/Department or the Reference Number. Once the record schedule is found the "Active Text" to the right of the screen will provide the cut-off.

- Box Description. Go to the "Box Description" line and enter the box contents. If the contents of the box are not to be disclosed enter a dash sign.

- Box Size. Select size. The size of the standard records carton is "Full".

- Records Schedule Information. Below are two alternatives to complete this entry:

Scroll to the bottom of the page to "Record Schedule Information". In the "Search Here" line enter the Record Series Reference Number under Reference Number the Records Schedule Information appears below, then click on the round circle to the left and the Reference Number will automatically appear in this field.

If you do not know the Record Series Reference Number, scroll to the bottom of the page to "Record Schedule Information". In the "Search Here" line your agency/department and all of the record series which apply to your agency will be listed. Select the correct series by clicking on the round circle to the left and the Reference Number will automatically appear in this field.

5. Click on the "Save & New" button to save the box.
Once you have saved the box – a new blank screen will appear and you can then create the next box.

6. Click on the "Save& Close" button if there are no further boxes to be created and
Return to the Home page.

Newly created boxes are saved in "Manage Label Queves".

Creating a Transfer Place

In order to transfer records to the State Records Center you must establish a transfer place for your agency/department commonly referred to as Your Place. Never transfer boxes to any other place in Infolinx except "Your Place".

- Go to Infolinx - Homepage.

• Click on Places.

• Click on the "New" tab on the "Action Button" line.

• Enter an entry for "Place Name". It can be your name or designated name. You will need to remember "Your Place Name" to transfer boxes.

• Enter Agency/Department.

• Click on "Save & Close".

Absolutely, never transfer any boxes to the "Place" called SRC (State Records Center). This Place is designated for only for use by State Records Center staff.

Transferring Records to the State Records Center

When records have met the scheduled requirement for retention in your office, you may submit a request to have the records transferred to the State Records Center.

• Go to the Infolinx "Home Page" and click on the "Boxes" tab. Find the record of boxes by entering the box information in the "Search Here" line. Examples of information to enter:

- Agency/Department
- Agency Box Number
- Cut-off Date, and
- Reference Number.

You will need to determine what information to enter that will work for you. Enter your search data exactly as the information was entered when you created the box.
Example – a reference number of SOC 3-4-1-1 needs to be entered as SOC 03-04-01-01. If you are successful the box description will appear in the grid at the bottom of the page, if not, you will receive a message stating "The search found 0 boxes".

• Select the "Quick Description" box if all the boxes on this page are being transferred. If not choose the ones to transferred by clicking on the small box to the left of each box description.

• Click the "Transfer" tab - when boxes are selected.

• Click the "Places" tab - If the list to be transferred is correct.

• Go to the "Search Here" line and enter "Your Name/New Boxes to SRC".

• Click on the "Go" button.
A box will show with the headers, Place Name/Agency/Department/Place Barcode in a grid at the bottom of the page.

• Click on the circle to the left of your name - this will populate the field for a barcode on the destination barcode line.

• Go to the top of the page and click on the “Transfer” button. The boxes will be transferred to “Your Place”.
The requested transfer will be reviewed by the State Records Center. When approved, make arrangements with the State Records Center to deliver the boxes to the State Records Center.

Never transfer boxes to any other place in infolinx except “Your Place”. Absolutely, never transfer any boxes to the “Place” called SRC (State Records Center). This Place designated is to be only used by the State Records Center.

Print Labels of Newly Created Boxes

• Go to the Home page and one the “Top Level Menu” line click on “Manage Label Queues.

• Click on Agency Box Labels 5164 (always use 5164) and the boxes will show on the grid at the bottom of the page.

• Select the labels to printed by clicking on the small box under “Box Description” and click on “Printed Selected” or if you want all to be printed click on “Print" button.

The Adobe Reader screen will process and print by using the print icon or select “File” and then “print”.

Once the printing process is completed a screen will appear prompting you to “Delete Printed Labels from Queue”. Make sure the labels have printed correctly before you delete them from the queue. If you have deleted labels from the queue and you need to print, you will have to follow the directions for “Finding a Box”. Once located, click on the small box to the left on the grid then click on the “Label” button on the “Quick Search Area” line. This will take you to the drop down box and choose Agency Box Label 5164.

If you have problems printing labels you may need to have your “Pop-up Blocker” turned off or have the Adobe Acrobat Reader re-installed.

Retrieving a Box

Go the Infolinx - Home page.

Click on the Boxes Tab.

Enter box information on the “Search Here” line.

- Box will appear in the grid at the bottom of the page.

Click on the “Quick Description” box or the small box to the left of the box description.

- To make sure you have the correct box click on the “View” button. The contents of the box will be displayed.

Click on the “Request” button. It will take you to the “Request Items” screen. On this screen

- Your barcode will appear in the destination barcode line and your name/department will be open to the right of the box.

Enter Reason for the Request. (Answer both of the questions below).

1. Indicate whether you want the box or a specific folder; if you want a folder – you must identify it by label (i.e. name, number, date, etc). The labeling must be apparent when we open the box – SRC staff will not search through box.

2. Enter either “Agency Pick Up” or “To be used at SRC”.

Click on the “Request” button. The screen “Request Results” will appear stating “I request Succeeded.”

Click on the “ok”. You may receive a message stating, “I request was added to the Waitlist.” If you are placed on a waitlist you will need to wait until this box is returned to the State Records Center. You will be notified when the box has been returned.

Identifying where boxes are held (in agency or in State Records Center)

Go the Infolinx - Home page.

Click on the Boxes Tab.

Enter agency box number on the “Search Here” line.

- Box will appear in the grid at the bottom of the page. The location of the Box will appear in the last entry on right.
- If the agency has more than box with the same box number – all of the boxes with this number will appear in the grid. Refer to information listed in the grid for each box to determine which is the correct box and its location.

Determining the Destruction Date Established for a Box

Go the Infolinx - Home page.

Click on the Boxes Tab.

Enter agency box number on the “Search Here” line.

- Box will appear in the grid at the bottom of the page. The location of the Box will appear in the last entry on right.
- If the agency has more than box with the same box number – all of the boxes with this number will appear in the grid. Refer to information listed in the grid for each box to determine which is the correct box and its location.