**TexLinx** system updates in this edition of the **TexLinx Instruction Guide**:

1. **TexLinx** branding has replaced the Infolinx logo.

2. **Drive Date** is now required on all applicable tabs.

3. The fields on the **Boxes** tab and the **Microforms** tab have been rearranged to reflect conformity.

4. **Data Sheet** is now available on the **Files** tab.

5. **Box Types** field has been updated in the **Disaster Recovery** tab.

6. **Return Type** field in **Disaster Recovery** has been modified to a single selection: **Will Call**.

7. **Specific Return Date** field has been removed from **Disaster Recovery**. All returns are now scheduled thru **Will Call**.

8. **Film Type** and **Film Size** have some added options in the **Microforms** tab, but these options are selected only by the Imaging Staff at the State Records Center in conjunction with information provided for an Imaging Production work order.

9. **Beginning File | Ending File Range** field label on the **Boxes** tab and on the **Microforms** tab now includes the Pipe symbol (instead of a forward slash or a hyphen) to help reduce confusion.

10. **NEW ACCESSION** is required to be entered into the Comments field on the Request Items to be Picked Up screen when sending items to the State Records Center for the first time.

11. **Fiche Circulation** tab has been added for users to make delivery and pickup requests in TexLinx for individual microfiche jackets. The procedures are explained in the sections **Request Pickup: Returning Microfiche Partial Bundles to the SRC** and **Request Delivery: From the State Records Center: Microfiche Jackets**.

12. Explanation for what happens when something is assigned as **Waitlist** when completing a Request Delivery.

13. New **Appendix** sections in this guide:
   - **Cancel a Request (Pickup or Delivery)**
   - **Dashboard**
   - **Change Your Password**
   - **Timer**
   - **Export**
# TexLinx Instruction Guide

## Table of Contents

### INTRODUCTION TO TEXLINX
- What is TexLinx? .......................................................... 15
- Why use TexLinx? .......................................................... 15
- Don't get placed in Time Out, be sure to Logout! .................. 15
- What is this manual? ..................................................... 15
- And...TEX SAYS? ....................................................... 15
- Help! Who Do I Call For Assistance? ............................... 16
- About the TexLinx Instruction Guide ............................... 16

### TEXLINX HOMEPAGE
- Navigation Menu ...................................................... 17
- Item Type Tabs ......................................................... 17
- Quick Search ............................................................ 18
- Action Menus ........................................................... 19
  - Activity ............................................................... 20
  - Search and View ................................................... 20
  - Data Manipulation ................................................ 20
  - Data Removal ....................................................... 20
  - Cart ................................................................. 20
- Homepage Grid ........................................................ 21
- Pages and printing ................................................... 21
- The ribbon ............................................................. 21
- Items ................................................................. 21

### BOXES:

#### USE ‘CREATE’ TO BUILD BOXES
- Create a New Box screen .............................................. 23
  - Organization ......................................................... 24
  - Record Series ....................................................... 24
  - Box Size ............................................................. 25
  - Inclusive Date Range ............................................. 25
  - Drive Date .......................................................... 25
  - Override ............................................................ 26
  - Agency Box # ...................................................... 26
  - Beginning File | Ending File Range ............................ 26
  - Notes ............................................................... 26
  - Completed: Create a New Box screen ......................... 27
  - Saving .................................................................. 28
  - Creating Box dialogue box .................................... 28

#### USE ‘DATA SHEET’ TO BUILD MULTIPLE BOXES
- Create New Boxes data sheet ...................................... 31
  - Organization ......................................................... 32
  - Record Series ....................................................... 32
Data Fields………………………………………………………………………….………....33
Setting up the Data Sheet………………………………………………………………………….33
Activate Container Row Checkbox………………………………………………….……..33
Box Size…………………………………………………………………………….……....33
Inclusive Date Range……………………………………………………………………………34
Drive Date………………………………………………………………..............................34
Override…………………………………………………………………………………….34
Agency Box #........................................................................................................35
Beginning File | Ending File Range…………………..…………………………………….35
Notes………………………………………………………………………………………..35
Completed: Create New Boxes data sheet……………………………………….……....…36
Saving……………………………………………………………………….……………...36
Creating Boxes dialogue box………………………………………………………………………….36

BOXES:

USE ‘RECORDS SERIES’ TO BUILD BOXES…………………………………….……...…39
Search Records Series screen………………………………………………………...39
View a Record Series screen………………………………………………………..…...40
Create a New Box screen………………………………………………………..………….41

FILES……………………………………………………………………………...…………….43
I: CREATE FILES FROM THE FILES TAB…………………………………………………...43
Create a New File screen…………………………………………………………...…………43
Organization………………………………………………………………………………...44
Agency File Name…………………………………………...……………………………..44
Agency Sub File Name……………………………………………………...……………...44
File Notes…………………………………………………………………………………...45
Saving……………………...……………………………………………………………….46
Creating File dialogue box…………………………………………………………………46
Place files into a box at your agency………………………...………………………………..46
Search Files screen…………………………………………………………………………...47
Search Results for Files, Select Files………………………………………………………….48
A. Transferring Files to a Box………………...……………….…………….……...……...48
B. Transfer Items screen…………………………………………………………………….49
Search Tabs…………………………………………………………………………...….49
Search Tabs: Boxes………………………………………………………………………...50
Select the Box………………………………………………………………...………….50
Final Step: Transfer the File(s) to the Box……………………………………………….51
Message dialogue box……………………………………………………………………51

II. CREATE FILES FROM THE BOXES TAB………………….……………………………..52
Search Boxes screen…………..………………………………………………….…………...52
Selecting the Box………………………………….…………………………………………..53
Creating a File from the View a Box page…………………………………………………….53
Creating a New File screen………………………………………………………….………...54
Organization…………………………………………..………………………………….....54
Agency File Name…………………………………………………….……………………54
Agency Sub File Name…………………………………………………………………….54
File Notes…………………………………………………………………………….……..55
Fiche Count...........................................................................................................79
Image Count...........................................................................................................79
Addition..................................................................................................................79
Notes......................................................................................................................79
Completed: Create a New Microforms screen.......................................................80
Saving.....................................................................................................................81
Creating Microform dialogue box...........................................................................81

MICROFORMS:
USE ‘CREATE’ TO BUILD MICROFICHE BUNDLES..............................................83
Some information about Microforms....................................................................83
Bundle Microfiche Jackets.....................................................................................83
Create a New Microforms screen..........................................................................84
   Organization.........................................................................................................85
   Imaging Production...............................................................................................85
   Record Series.......................................................................................................86
   Film Type.............................................................................................................86
   Film Size.............................................................................................................87
   Inclusive Date Range..........................................................................................87
   Drive Date...........................................................................................................87
   Override.............................................................................................................88
   Agency Reel #....................................................................................................88
   Beginning File | Ending File Range...............................................................88
   Fiche Count.........................................................................................................88
   Image Count.......................................................................................................89
   Addition.............................................................................................................89
   Notes..................................................................................................................89
Completed: Create a New Microforms screen.......................................................90
Saving.....................................................................................................................91
Creating Microform dialogue box...........................................................................91

MICROFORMS:
USE ‘DATA SHEET’ TO BUILD MULTIPLE MICROFILM REELS......................93
Some information about Microforms....................................................................93
Create New Microforms data sheet......................................................................94
   Organization.........................................................................................................95
   Imaging Production...............................................................................................95
   Record Series.......................................................................................................95
   Data Fields..........................................................................................................96
Setting up the data sheet.......................................................................................96
   Activate Container Row Checkbox....................................................................97
   Film Type.............................................................................................................97
   Film Size.............................................................................................................98
   Inclusive Date Range..........................................................................................98
   Drive Date...........................................................................................................99
   Override.............................................................................................................99
   Agency Reel #....................................................................................................99
   Beginning File | Ending File Range...............................................................100
Fiche Count…………………………………………………………………………………………100
Notes…………………………………………………………………………………………100
Completed: Create a New Microforms data sheet………………………………………………101
Saving…………………………………………………………………………………………102
Creating Microform dialogue box……………………………………………………………102

MICROFORMS:
USE ‘DATA SHEET’ TO BUILD
MULTIPLE MICROFICHE BUNDLES………………………………………………………...105
Some information about Microforms……………………………………………………………105
Bundle Microfiche Jackets……………………………………………………………………105
Create New Microforms data sheet…………………………………………………………106
Organization……………………………………………………………………………………107
Imaging Production……………………………………………………………………………107
Record Series…………………………………………………………………………………107
Data Fields……………………………………………………………………………………108
Setting up the data sheet……………………………………………………………………108
Activate Container Row Checkbox…………………………………………………………109
Film Type……………………………………………………………………………………109
Film Size……………………………………………………………………………………..109
Inclusive Date Range………………………………………………………………………110
Drive Date……………………………………………………………………………………110
Override…………………………………………………………………………………………110
Agency Reel #…………………………………………………………………………………111
Beginning File | Ending File Range…………………………………………………………111
Fiche Count……………………………………………………………………………………111
Notes…………………………………………………………………………………………112
Completed: Create New Microforms screen…………………………………………………112
Saving…………………………………………………………………………………………113
Creating Microform dialogue box……………………………………………………………113

MICROFORMS:
USE ‘RECORD SERIES’ TO BUILD
MICROFILM REELS AND MICROFICHE………………………………………………115
Search Records Series screen…………………………………………………………115
Search Results screen……………………………………………………………………116
View a Record Series screen…………………………………………………………116
Create a New Microforms screen…………………………………………………………117

REQUEST PICKUP:
FROM YOUR AGENCY……………………………………………………………………119
After clicking Save & View…………………………………………………………119
Use Search…………………………………………………………………………………120
Search Boxes screen……………………………………………………………………120
Search Results screen……………………………………………………………………121
Request Pickup………………………………………………………………………………121
Request Items to be Picked Up screen…………………………………………………122
Sending items to the State Records Center for the first time…………………………122
Returning items to the State Records Center…………………………………………122
Sections on the Request Items to be Picked Up screen……………………………………...123
Modifying the Pickup Location…………………………………………………………...124
Request Results screen…………………………………………………………………….124

REQUEST PICKUP:
RETURNING MICROFICHE PARTIAL BUNDLES TO THE SRC…………………………...127
Use Search…………………………………………………………………………………….127
Search Fiche Circulation screen……………………………………………………………128
Search Results screen……………………………………………………………………...128
Request Pickup………………………………………………………………………………..129
Request Items to be Picked Up screen…………………………………………………..129
Request Results screen……………………………………………………………………...130

REQUEST DELIVERY:
FROM THE STATE RECORDS CENTER:
BOXES, DISASTER RECOVERY, MICROFILM, MICROFICHE BUNDLES, AND FILES*………………………………………………………...133
Find the Items to Request Delivery…………………………………………………………...133
Search Boxes screen………………………………………………………………………….134
Search Results screen……………………………………………………………………...134
Request Delivery………………………………………………………………………………..135
Sections on the Request Items screen……………………………………………………….135
  Changing the Delivery Destination………………………………………………………….136
  Comments field……………………………………………………………………………..137
  Alternate Fulfillment Method………………………………………………………………137
Review the Request Items screen…………………………………………………………….137
Request Results screen……………………………………………………………………...138
Waitlist…………………………………………………………………………………………138
*Files that already appear in TexLinx

REQUEST DELIVERY:
FROM THE STATE RECORDS CENTER:
FILES NOT ALREADY ENTERED INTO TEXLINX………………………………………………141
Find the Items to Request Delivery…………………………………………………………...141
Search Boxes screen………………………………………………………………………….141
Search Results screen……………………………………………………………………...142
Request Delivery………………………………………………………………………………..142
Request Items screen……………………………………………………………………………143
  Enter File Information…………………………………………………………………….143
  Enter File Information table……………………………………………………………..144
  Changing the Delivery Destination………………………………………………….…144
  Comments field…………………………………………………………………………..145
  Alternate Fulfillment Method……………………………………………………………145
Submit the Delivery Request………………………………………………………………146
Request Results screen……………………………………………………………………...146

REQUEST DELIVERY:
FROM THE STATE RECORDS CENTER:
MICROFICHE JACKETS……………………………………………………………………».149
Use Search………………………………………………………………………………149
Search Microforms screen…………………………………………………………149
Search Results screen……………………………………………………………150
Move to View a Microform screen…………………………………………….150
View a Microform screen………………………………………………………151
Create a New Fiche Circulation screen………………………………………152
# of Pulls……………………………………………………………...………………………152
# of Fiche Pulled………………………………………………………………………………152
Notes…………………………………………………………………………………..……152
Completed: Create a New Fiche Circulation screen…………………………….153
Saving……………………………………………………………………………………153
Creating Fiche Circulation dialogue box…………………………………………154
Request Delivery for Microfiche Jackets…………………………………………154
Use Save & View to Request Delivery……………………………………………154
Find the Items to Request Delivery………………………………………………155
Search Fiche Circulation screen…………………………………………………155
Search Results screen…………………………………………………………….156
Request Items screen………………………………………………………………157
Changing the Delivery Destination………………………………………………157
Comments field……………………………………………………………………158
Alternate Fulfillment Method……………………………………………………159
Review the Request Items screen………………………………………………159
Request Results screen…………………………………………………………….159

IMAGING PRODUCTION:
CREATE A WORK ORDER FOR
THE STATE RECORDS CENTER'S IMAGING DEPARTMENT…………………………161
Create a New Imaging Production screen……………………………………162
Imaging Production#........................................................................................163
Organization………………………………………………………………………..……163
Contact name……………………………………………………………………..163
Contact Phone # (and extension)…………………………………………………163
Will Created Media be Stored at SRC?........................................................164
Will Source Media be Stored at SRC?........................................................164
Record Series………………………………………….…………..…………………………164
# of Items Being Sent………………………………………………………………165
What are you sending us to be imaged (Media Type)...............................165
Is your Source Media already stored at SRC?..........................................166
If Source Media is stored here, how many are we imaging?......................166
Agency Reel# / Box# Range and/or Barcodes ........................................166
Inclusive Date Range………………………………………………………....……………166
What media are we creating?.....................................................................167
What size media are we creating?.............................................................168
Beginning File | Ending File Range.............................................................168
Process Only?.............................................................................................169
Duplicate…………………………………………………………………..………………169
# of Duplicates………………………………………………………………169
Type of Duplicate………………………………………………………………169
Addition…………………………………………………………………..………………169
Introduction to TexLinx

What is TexLinx?
TexLinx is a secure, cloud-based records management software package designed in a collaborative effort between the Texas State Library’s State & Local Records Management division and Baltimore, Maryland-based Infolinx. Depending upon the permissions assigned by each agency’s Records Management Officer or Records Management Liaison, agency users can:

- View the agency’s storage inventory at the State Records Center.
- Request pickups and deliveries between the agency and the State Records Center.
- Create imaging jobs with the State Records Center’s Imaging Department.
- View the agency’s Records Retention Schedule (only the RMO and/or RML can edit it).
- Register for training classes.
- Generate disposition requests (only the RMO and/or RML can do this).

Why TexLinx?
The springboard for TexLinx was an audit conclusion several years ago that reported the clients of the State Records Center would be better served by providing an online system where agency users could view their agency’s State Records Center inventory of records. Over the years, that recommendation grew to include more than just an inventory of records to include all aspects of the State & Local Records Management division. The system is streamlined to incorporate all facets of the State & Local Records Management division.

Don’t get placed in Time Out, be sure to Logout!
When you log in to TexLinx, you create a spot for yourself in the system. The system has a limited number of spots available so, as long as you are active in the system, you keep your spot. But if you are inactive for more than 10 or 15 minutes without logging out, the system will time out your session...but it has not freed your spot for another user. And it will be that way for 24 hours. The only way to avoid time out is to logout each time you are finished working in TexLinx. It is a courtesy to other users who need to be in the system.

What is this manual?
This is a comprehensive guide designed so that sections stand on their own. Please do not be intimidated by the number of pages. Each section gives you step-by-step instructions, often with illustrations, for a particular process. So, please refer to the Table of Contents to find the task you want to accomplish and go to that section in the guide and follow the instructions. Anytime you hit a speed bump or appear to be stuck, the contact information on the following page is a great resource to get your questions answered.

And...TEX SAYS?
Hi, there! My name’s Tex and I’m hanging out in the cloud with TexLinx. People often say, “Tex says a lot.” I suppose that is true. I do have a lot to say; but like wise old timers, when I say something, it is usually important. So, listen up, partner! When you see TEX SAYS that is just little ol’ me adding a bit more detail to the instruction.
Help! Who do I call for assistance?
This TexLinx Instruction Guide is designed to assist you with most of the processes you will use. However, if there comes a time when you need assistance, we are here to help. These are the people, the phone numbers, and the email addresses for the employees in the State & Local Records Management division (at the State Records Center on Shoal Creek Boulevard and downtown at the Lorenzo De Zavala Building) who can answer your TexLinx questions:

State Records Center (storage, deliveries, pickups, destruction, imaging)

RECORDS CENTER TEXLINX QUESTIONS:
Michael Shea, SRC Manager, 512-475-5151, michael.shea@tsl.texas.gov
Dee Riley, SRC Assistant Manager, 512-475-5152, dee.riley@tsl.texas.gov
Bobby French, Customer & System Specialist, 512-475-5167, bobby.french@tsl.texas.gov
Zachary Bruton, Records Circulation Team Lead, 512-475-5155, zachary.bruton@tsl.texas.gov

DESTRUCTION:
Michael Shea, SRC Manager, 512-475-5151, michael.shea@tsl.texas.gov

IMAGING (microfilm, microfiche, digital imaging):
Pete Cortez, Lead Worker, 512-475-5162, pete.cortez@tsl.texas.gov

Records Management Assistance (Retention schedules, training classes)
Sarah Jacobson, RMA Manager, 512-463-5449, sarah.jacobson@tsl.texas.gov
Erica Wilson, Government Information Analyst, 512-463-6627, erica.wilson@tsl.texas.gov

Password Assistance
Scott McDonald, Data Center Specialist, 512-475-5166, scott.mcdonald@tsl.texas.gov

Director, State & Local Records Management division
Craig Kelso, 512-463-7610, craig.kelso@tsl.texas.gov

About the TexLinx Instruction Guide:
Care and attention have been used to ensure the TexLinx Instruction Guide is accurate and complete. If you find a printing error, please send an email to texlinx@tsl.texas.gov

If there is something you would like to see added in a future edition of the TexLinx Instruction Guide, please let us know at texlinx@tsl.texas.gov
This is a sample of how the Boxes screen appears for Johnny Agency who is a Records Center User (RCU) in TexLinx for the Texas Big State Agency. The formatting of the screen is similar in the other Item Type Tabs for Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Record Series.

1. **Navigation Menu**: These links are always available throughout the application. They can be used to quickly jump to a particular section of TexLinx.

2. **Item Type Tabs**: These are the types of items available to you in TexLinx. A white tab is the current active tab. Orange tabs are the current inactive tabs.

3. **Quick Search**: Input search fields for TexLinx. Quick Search fields vary depending upon the Item Type Tab.

4. **Action Menus**: Actions that can be performed on items matching search criteria.

5. **Homepage Grid**: Records matching a given search.

**Checkboxes**

6. **Select All Items** on this page of the grid, click the checkbox on the left of the orange ribbon.

7. **Box Select**, click the checkbox to the left of each item to select individual boxes.
1. **Home**: Always returns you to the last Item Type Tab’s homepage grid.

2. **Preferences**: Used to set preferences for each individual.

3. **Reports**: Go here to generate specific reports that your Role permissions allow you to view.

4. **Requests**: See pickup and delivery requests you have submitted but have not been processed thru the State Records Center (SRC).

5. **Admin**: This area is regulated by the Role permissions assigned to you in TexLinx.

6. **Dashboard**: See items in your possession, pending requests you’ve made, and your preferences

7. **Help**: This is a quick tour of each page.

8. **Print**: Prints what is seen on the page, not all of what is contained on the pages of a grid.

9. **TexLinx Resources**: Reference materials designed to assist you with TexLinx.

10. **Timer**: The amount of time left before this session ends. To reset the timer, click a Save option, click a radio button, or move to another TexLinx tab. The timer starts at 20 minutes. End-of-session pop-up warnings are posted when time remaining is 3 minutes, 2 minutes, and 1 minute.

11. **Logout**: Always click Logout when you are finished working in TexLinx. If you do not Logout, you might get an error message the next time you log into TexLinx.

---

### Item Type Tabs

- **Boxes**: Create and edit boxes, request pickup, and request delivery.
- **Files**: Create and edit files and place them in boxes, request pickup, and request delivery.
- **Disaster Recovery**: Create and edit Disaster Recovery items, request pickup, and request delivery.
- **Microforms**: Microforms is the combined tab for Microfilm and Microfiche. Create and edit microforms, request pickup, and request delivery.
- **Fiche Circulation**: Request delivery and/or request pickup for individual Microfiche Jackets.
- **Imaging Production**: Create a work order for the Imaging Department at the State Records Center.
- **Records Series**: Until your agency’s full Retention Schedule is uploaded, only those Records Series Titles with storage at the State Records Center when TexLinx launched and those added thereafter appear under this tab.
Quick Search

The fields for Quick Search vary from tab to tab. Enter search information using data and symbols to find the items you need. Please see Search in the Appendix for information on how to use keyboard shortcuts.

**Search**: Click this after you complete one or more of the Quick Search fields.

**Clear**: Clicking this clears all Quick Search fields as well as the results in the homepage grid.

**(Rollover for Current Search)**: Hover your mouse over this to tell you the search criteria you entered into the Quick Search fields.

**Shortcuts you can use in the Quick Search fields:**

<table>
<thead>
<tr>
<th>Shortcut</th>
<th>Definition</th>
<th>Data Entered</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>=</td>
<td>Exact</td>
<td>=500</td>
<td>Items with 500</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater Than</td>
<td>&gt;500</td>
<td>Items greater than 500</td>
</tr>
<tr>
<td>&lt;</td>
<td>Less Than</td>
<td>&lt;500</td>
<td>Items less than 500</td>
</tr>
<tr>
<td>&gt;=</td>
<td>Greater Than or Equal To</td>
<td>&gt;=500</td>
<td>Items equal to and greater than 500</td>
</tr>
<tr>
<td>&lt;=</td>
<td>Less Than Or Equal To</td>
<td>&lt;=500</td>
<td>Items equal to and less than 500</td>
</tr>
<tr>
<td>&gt;&lt;</td>
<td>Greater Than And Less Than</td>
<td>&gt;500&lt;700</td>
<td>Items greater than 500 and less than 700</td>
</tr>
<tr>
<td>IsNotNull</td>
<td>Field With Data</td>
<td>IsNotNull</td>
<td>Items with data in that field</td>
</tr>
<tr>
<td>IsNull</td>
<td>Field With No Data</td>
<td>IsNull</td>
<td>Items with no data in that field</td>
</tr>
</tbody>
</table>
To activate any of these menus, select an item or items from the homepage grid, click on the menu title, and a dropdown menu appears. This is tab specific so all work using any of these menus is for one tab only.

**ACTIVITY**
*Request Delivery*: Request delivery from the State Records Center.
*Request Pickup*: Request pickup from your agency.
*Export*: Export items from TexLinx to your computer.

**SEARCH AND VIEW**
*Search*: The screen is a page of searchable fields.
*Key Word Search*: Use a combination of a specific field and a key word found in that field.
*Query*: Use equations to generate a search.
*View*: View a specific item.
*History*: View the history of an item.

**DATA MANIPULATION**
*Create*: Create a new item.
*Bulk Create*: Create multiple items with identical but editable information.
*Data Sheet*: Appears only on Boxes, Files, and Microforms tabs. Create multiple items in a spreadsheet format for a single Organization and a single Record Series Title.
*Update*: Revise current items in TexLinx.
*Bulk Update*: Revise a collection of items in TexLinx with the same revised information.
*Search & Replace*: Search for a specific term and replace that term with another specific term.

**DATA REMOVAL**
*Delete*: Delete an item from view and remove it from the active TexLinx inventory.

**CART**
*Add To Cart*: Move selected items to the cart for your future use in the current tab
*View Cart*: View the items you have moved to your cart for the current tab

**TEX SAYS** Clicking (0 items) is another way to view items in your cart. It is also an accumulated total for the items you have added to your cart for the current tab. The Cart is tab specific; items you place in the cart for one tab do not appear in The Cart for another tab.
Homepage Grid

Homepage Grid varies from tab to tab. There are three parts to the grid:
1. Pages and Printing
2. The Ribbon
3. Search result items

PAGES AND PRINTING


Page 1 [2] [3] [4] [5]: How many pages your search generated. The current page always appears outside of brackets in black text. This example shows 84 Boxes were found and the search results spread out over 5 pages. If you want to see more results on the homepage grid:
1. click Preferences in the Navigation Menu.
2. click Home Page.
3. edit the number that appears in the field for Number of records per page displayed in grid.

Jump to Page: Moves you to a specific search results page.
Print: Click the printer icon to print a full list of all of the search results from all pages.

THE RIBBON

Select All Items checkbox: The orange ribbon details the columns on the grid. While the information in this ribbon varies from tab to tab, one thing that remains constant is the checkbox on the far left on the ribbon. Clicking this checkbox selects every item on this page of the grid.
TEX SAYS: Clicking the Select All checkbox does not select every item on every page the search generated. If you want to select every item a search generated and you have multiple pages, review the above information in Pages and Printing about adjusting Preferences to see more results.

Sorting: To sort the columns of the grid, click a column header that appears in the orange ribbon.

SEARCH RESULT ITEMS

<table>
<thead>
<tr>
<th>Box Records</th>
<th>Agency Name</th>
<th>Division Name</th>
<th>Box Size</th>
<th>Agency Box #</th>
<th>Include Date Range</th>
<th>Beginning File Date</th>
<th>Ending File Date</th>
<th>Eligible Destruction Date</th>
<th>AIN</th>
<th>Record Series Title</th>
<th>Event Record</th>
<th>Years</th>
<th>Months</th>
<th>Destruction Batch #</th>
<th>Current Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>000774345</td>
<td>Texas Big State Agency - 989</td>
<td>North</td>
<td>RC</td>
<td>1</td>
<td>1/1/2013 - 1/1/2015</td>
<td>822</td>
<td>12/31/2017</td>
<td>17</td>
<td>84</td>
<td>Requests for Printing/Distribution</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>000774346</td>
<td>Texas Big State Agency - 989</td>
<td>central</td>
<td>RC</td>
<td>1</td>
<td>1/1/2013 - 1/1/2015</td>
<td>0001</td>
<td>12/31/2017</td>
<td>12</td>
<td>84</td>
<td>Requests for Printing/Distribution</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>000774347</td>
<td>Texas Big State Agency - 989</td>
<td>east</td>
<td>RC</td>
<td>1</td>
<td>01/01/2010 - 10/31/2010</td>
<td>01/06</td>
<td>06/30/2020</td>
<td>1</td>
<td>Authorization to Participate Cards</td>
<td>AC 5 6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>000774348</td>
<td>Texas Big State Agency - 989</td>
<td>east</td>
<td>RC</td>
<td>1</td>
<td>1/1/2015 - 10/31/2015</td>
<td>66A/36</td>
<td>08/31/2017</td>
<td>6</td>
<td>Employee Earnings Records</td>
<td>AC 10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>000774349</td>
<td>Texas Big State Agency - 989</td>
<td>east</td>
<td>RC</td>
<td>1</td>
<td>01/01/2010 - 10/31/2010</td>
<td>0001</td>
<td>12/31/2017</td>
<td>12</td>
<td>84</td>
<td>Requests for Printing/Distribution</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>000774350</td>
<td>Texas Big State Agency - 989</td>
<td>central</td>
<td>RC</td>
<td>1</td>
<td>10/31/2010 - 10/31/2010</td>
<td>12/31/2010</td>
<td>6</td>
<td>Employee Earnings Records</td>
<td>AC 10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>000774352</td>
<td>Texas Big State Agency - 989</td>
<td>east</td>
<td>RC</td>
<td>1</td>
<td>12/31/2010 - 10/31/2010</td>
<td>10/31/2015</td>
<td>04/08/2010</td>
<td>3</td>
<td>Expedition Investigation</td>
<td>FE 50</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>000774353</td>
<td>Texas Big State Agency - 989</td>
<td>east</td>
<td>RC</td>
<td>1</td>
<td>01/01/2010 - 10/31/2010</td>
<td>01/06</td>
<td>06/30/2020</td>
<td>1</td>
<td>Authorization to Participate Cards</td>
<td>AC 5 6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>000774354</td>
<td>Texas Big State Agency - 989</td>
<td>north</td>
<td>RC</td>
<td>1</td>
<td>01/01/2010 - 10/31/2010</td>
<td>01/06</td>
<td>06/30/2020</td>
<td>1</td>
<td>Authorization to Participate Cards</td>
<td>AC 5 6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Checkboxes: Click the checkbox on the left side of the screen to select that item for pickup, delivery, editing, or other action using the dropdowns in the Action Menus.

Current Location: This tells where the item currently is. If you see ⚠️ it means the item is in the State Records Center and the exact location is not disclosed for security reasons.
Boxes:

Use ‘Create’ to Build Boxes

Create is used to create one or many boxes, one container at a time.

1. Click the Boxes item type tab.
2. Click Data Manipulation in the Action Menus.
3. Select Create from the dropdown menu.

CREATE A NEW BOX screen
Boxes: Use ‘Create’ to Build Boxes

TEX SAYS All fields with an asterisk (*) are required fields. The page does not process without completing these required fields.

*Organization

Select the Organization within the agency associated with this box by clicking the button on the left side of the screen or use the Quick Search fields (1) to reduce the number of options.

TEX SAYS If you do not see the organization you need, the organization does not exist in TexLinx or your permissions do not allow you to see that organization. Contact the Records Management Officer at your agency to resolve this issue.

*Record Series

Record Series is the Record Series Title on the agency’s Records Retention Schedule that the box(es) are assigned. Select the Record Series Title by clicking the button on the left side of the screen. Initially, every Record Series available for storage appears. Use the Quick Search fields (1) to narrow the selection of available Record Series Titles.

TEX SAYS If there is a Record Series you need that does not appear, contact your agency’s Records Management Officer to resolve this issue.

How these fields look when completed:
Boxes: Use ‘Create' to Build Boxes

*Box Size

Box Size options are:
- RC — Regular Container (a standard 1.2-cubic-foot box)
- RP-36 — Roll Plan 36” (a large 6”x6”x36” storage box for items that do not fit in an RC box)
- RP-48 — Roll Plan 48” (a large 6”x6”x48” storage box for items that do not fit in an RC box)

*Inclusive Date Range

The Inclusive Date Range can be completed in one of two ways:
- Use the same beginning and ending date information for all boxes to be created (if more than one box is being created). This method results in the same Eligible Destruction Date for all of the boxes.
- Use a unique set of beginning and ending inclusive dates for each box to be created. This method results in a different Eligible Destruction Date for each box.

The date information is entered in this format with no spaces:
MM/DD/YYYY-MM/DD/YYYY

If the Beginning Date and the Ending Date are the same, you must enter the same date twice.
Example: 12/31/2015-12/31/2015.

TEX SAYS Do not use a hyphen within the dates, use a hyphen only to separate the dates.

Data Example: 01/01/2007-12/31/2014 or 1/1/2007-12/31/2014 or 1/07-12/31/14

*Drive Date

Drive Date:

Enter a date MM/DD/YYYY or click the Calendar Icon to select a Drive Date. The Drive Date is used in conjunction with Total Retention (Event Based, Years, Months, Days) to calculate an Eligible Destruction Date.

TEX SAYS Do not use a hyphen within the date. Please see Appendix: Calculate the Drive Date for more information.

Data Example: 12/31/2014

How these fields look when completed:

*Box Size: [RC]

*Inclusive Date Range: 01/01/2007-12/31/2014

*Drive Date: 12/31/2014
Override

Override is an optional tool to change the Drive Date when an automatic calculation occurs under these two conditions:

- FE or CE is used in Event Based on the agency's Records Retention Schedule
- Only years and/or months and/or days are the Total Retention on the agency’s Records Retention Schedule (and no acronym used as Event Based).

Under either of those two conditions, the Drive Date is going to auto calculate by TexLinx. If a Drive Date different from the TexLinx auto calculation is needed, you must click this checkbox to override the Drive Date that calculates and enter the Drive Date you want to use in the Drive Date field.

*Agency Box #

*Agency Box #: 

Agency Box # is the identification number you assign to this container. The Agency Box # can be numbers, letters, symbols, or any combination thereof. The only restriction: Do not use a Pipe symbol | as part of the Agency Box #. The Pipe symbol is explained in Beginning File | Ending File Range.

Data Example: H-7765

TEX SAYS To accommodate letters and symbols in addition to numbers, this is a text field.

*Beginning File | Ending File Range

*Beginning File | Ending File Range: 

The Beginning File | Ending File Range is composed of the first and last item in the box. The Pipe symbol is used as a separator between the beginning file name and the ending file name. The Pipe symbol is created by holding down SHIFT on the keyboard and pressing the backslash key (SHIFT \\).

TEX SAYS If the Beginning File and the Ending File are the same, enter SAME as the Ending File name.

In the below example, a space appears before and after the Pipe for illustrative purposes only.

Data Example: Acuff | Zolt

Notes

Notes: 

Notes is an optional field used by the agency to assist users to remember something about the box or about the contents of the box.

Data Example: Files are arranged alphabetically.

How these fields look when completed:
**Boxes: Use 'Create' to Build Boxes**

Completed: Create a New Box screen:

```
<table>
<thead>
<tr>
<th>Organization Quick Description</th>
<th>AIN</th>
<th>RSIN</th>
<th>Record Series Title</th>
<th>Event Based</th>
<th>Years</th>
<th>Months</th>
<th>Days</th>
<th>Event Trigger</th>
<th>Archival</th>
<th>Vital</th>
<th>Remarks</th>
<th>Legal Citations</th>
<th>Approval Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Texas Big State Agency - 908</td>
<td>1</td>
<td></td>
<td>Authorization to Participate Cards</td>
<td>False</td>
<td>5</td>
<td>6</td>
<td></td>
<td>False</td>
<td></td>
<td></td>
<td></td>
<td>15-988-001</td>
<td>Approved</td>
</tr>
<tr>
<td>Texas Big State Agency - 908</td>
<td>2</td>
<td></td>
<td>Client Questionnaire</td>
<td>False</td>
<td>8</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Field</td>
<td>Approved</td>
</tr>
<tr>
<td>Texas Big State Agency - 908</td>
<td>3</td>
<td></td>
<td>Data Entry Form</td>
<td>True</td>
<td>2</td>
<td>6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>15-988-003</td>
<td>Approved</td>
</tr>
<tr>
<td>Texas Big State Agency - 908</td>
<td>4</td>
<td></td>
<td>Notice of Possible Eligibility</td>
<td>False</td>
<td>15</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>15-988-004</td>
<td>Approved</td>
</tr>
<tr>
<td>Texas Big State Agency - 908</td>
<td>5</td>
<td></td>
<td>Eligible Cases</td>
<td>False</td>
<td>2</td>
<td>6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>15-988-005</td>
<td>Approved</td>
</tr>
<tr>
<td>Texas Big State Agency - 908</td>
<td>6</td>
<td></td>
<td>Employee Earnings Records</td>
<td>False</td>
<td>10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>15-988-006</td>
<td>Approved</td>
</tr>
<tr>
<td>Texas Big State Agency - 908</td>
<td>7</td>
<td></td>
<td>Employee Savings Bonds</td>
<td>False</td>
<td>50</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>15-988-007</td>
<td>Approved</td>
</tr>
<tr>
<td>Texas Big State Agency - 908</td>
<td>8</td>
<td></td>
<td>Employee Deduction Authorizations</td>
<td>False</td>
<td>50</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>15-988-008</td>
<td>Approved</td>
</tr>
<tr>
<td>Texas Big State Agency - 908</td>
<td>9</td>
<td></td>
<td>External Reports</td>
<td>False</td>
<td>3</td>
<td>6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>15-988-009</td>
<td>Approved</td>
</tr>
<tr>
<td>Texas Big State Agency - 908</td>
<td>10</td>
<td></td>
<td>Internal Fiscal Management Reports</td>
<td>False</td>
<td>10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>15-988-010</td>
<td>Approved</td>
</tr>
</tbody>
</table>
```

*Box Size: RC

*Inclusive Date Range: 1/1/2017-12/31/2014

*Drive Date: 03/31/2014

Override: [ ]

*Agency Box #: 7765

*Beginning File | Ending File | A | Z

Range: [ ]

Notes: Files are arranged alphabetically.
Boxes: Use ‘Create’ to Build Boxes

Saving

When the fields are complete, the next step is to **Save** the information.

These three options are located at the Create a New Box screen’s top right:

- **Save & New**: Use this to create another box. For convenience, some fields will carry forward to eliminate repeated data entry. Fields carried forward are still editable.
- **Save & View**: Use this if you have entered only one box and you are ready to make a Request Pickup.
- **Save & Close**: Use this if:
  - You have been selecting Save & New for a set of boxes and you are ready to make a Request Pickup for the boxes.
  or
  - You want to save the information you have entered for the box(es) but you are not yet ready to make a Request Pickup for the box(es).

Creating Box dialogue box

If the above dialogue box does not appear, and you are returned to the Create a New Box screen, an error message appears at the top of the screen. Correct the error message and click the save option you selected.

When the above screen appears, it includes the Box Barcode that was generated for this box. The Box Barcode is the unique identification number applied to each item created in TexLinx. Click **OK**. Then, if you selected:

- **Save & New**: Another Create a New Box screen appears. Some fields carried forward from the previous box created but all fields are editable.
- **Save & View**: View a Box is the screen for you to review the box you just created. The box has been saved in TexLink. Turn to **Request Pickup** to ask the State Records Center to pickup the box if you are ready to make the request.
- **Save & Close**: The boxes have been saved in TexLinx and the Box homepage appears. Turn to **Request Pickup** to ask the State Records Center to pickup your items if you are ready to make the request.
Boxes:
Use ‘Data Sheet’ to Build Multiple Boxes

**Data Sheet** is used to create multiple boxes for a single **Organization** and for a single **Record Series Title** using a format similar to a spreadsheet. Multiple Box Sizes and Inclusive Dates can also be used on the Data Sheet. This is an alternative to using Create, Save & New.

**TEX SAYS** Be mindful of the 20-minute timer at the top of the screen. If you start a data sheet and go for a period of time without clicking a radio button or saving your information, TexLinx times-out your login and your information is lost. You can always select Save & Close to save the information you have entered, move the items to the cart, and come back later to finish. If you do not place them in the cart, you will have to perform a Search to find the items you saved.

1. Click the **Boxes** item type tab.
2. Click **Data Manipulation** in the Action Menus.
3. Select **Data Sheet** from the dropdown menu.

**CREATE NEW BOXES data sheet**
**Boxes: Use ‘Data Sheet’ to Build Multiple Boxes**

All fields with an asterisk (*) are required fields. The page cannot process without completing these required fields.

**Organization**

*Organization:

Select the **Organization** within the agency associated with this set of boxes by clicking the button on the left side of the screen or use the Quick Search fields (1) to reduce the number of options. **TEX SAYS** If you do not see the organization you need, the organization does not exist in TexLinx or your permissions do not allow you to see that organization. Contact the Records Management Officer at your agency to resolve this issue.

**Record Series**

*Record Series:

**Record Series** is the boxes’ assigned Record Series Title on the agency’s Records Retention Schedule. Select the Record Series Title by clicking the button on the left side of the screen. Initially, every Record Series available for storage appears. Use the Quick Search fields (1) to narrow the selection of available Record Series Titles. **TEX SAYS** If there is a Record Series you need that does not appear, contact your agency’s Records Management Officer to resolve this issue.

How these fields look when completed:
**Data Fields**

There are up to eight data field columns to complete for each line of information on the Data Sheet. Most of these are completed the same way they were in Boxes: Use ‘Create’ to Build Boxes. The only exception is a checkbox to activate the container data entry row. **TEX SAYS** Columns are the sections of data found horizontally, left to right. Rows are sections of data found vertically, top to bottom.

**Setting up the Data Sheet**

The data sheet has as many available container data entry rows as your Preferences allow. Keep in mind that the data sheet processes with container data entry rows that have no information. But if you need extra container data entry rows, there is an easy way to adjust that. To increase/decrease the number of container data entry lines in the data sheet:

1. click **Preferences** at the top of the screen in the Navigation Menu.
2. click **Home Page**.
3. edit the number that appears in the field for **Number of records per page displayed in grid**.
4. click **Save**.

*Activate Container Row Checkbox*

The first thing to do when creating a container using Data Sheet is to click the checkbox (1) on the left side of the data sheet for each container you are creating. If you have changed your Preferences in the earlier step so that your data sheet uses every row to create a container, click the checkbox (2) at the top of the data sheet on the left side of the column label names. This automatically activates each container row. **TEX SAYS** Any line activated with a checkbox must be completed when the data sheet is processed. Do not click the checkbox for more containers than you need.

*Box Size*

**Box Size** options are:
- RC — Regular Container (a standard 1.2-cubic-foot box)
- RP-36 — Roll Plan 36” (a large 6”x6”x 36” storage box for items that do not fit in an RC box)
- RP-48 — Roll Plan 48” (a large 6”x6”x 48” storage box for items that do not fit in an RC box)

**TEX SAYS** It is possible to have different Box Sizes for some or all containers on the data sheet.

**How the data sheet looks for three containers so far:**

<table>
<thead>
<tr>
<th>Box Size</th>
<th>Inclusive Date Range</th>
<th>Drive Date</th>
<th>Override</th>
<th>Agency Box #</th>
<th>Beginning File</th>
<th>Ending File Range</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>RC</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RC</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RC</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Inclusive Date Range**

The **Inclusive Date Range** can be completed in one of two ways:

- Use the same beginning and ending date information for all boxes created. This method results in the same Eligible Destruction Date for all of the boxes.
- Use a unique set of beginning and ending inclusive dates for some or all of the boxes to be created. This method results in a different Eligible Destruction Date for each box.

The date information is entered in this format with no spaces: MM/DD/YYYY-MM/DD/YYYY. If the Beginning Date and the Ending Date are the same, you must enter the same date twice. Example: 12/31/2015-12/31/2015.

**Data Example:** 03/01/2014-02/28/2015 or 3/1/2014-2/28/2015 or 3/1/14-2/28/15

**Drive Date**

Enter a date MM/DD/YYYY or click the Calendar Icon to select a Drive Date. The Drive Date is used in conjunction with Total Retention (Event Based, Years, Months, Days) to calculate an Eligible Destruction Date.

**Data Example:** 2/28/2015

**Override**

Override is an optional tool to change the Drive Date when an automatic calculation occurs under these two conditions:

- FE or CE is used in Event Based on the agency's Records Retention Schedule.
- Only years and/or months and/or days are the Total Retention on the agency’s Records Retention Schedule (and no acronym used as Event Based).

Under either of those two conditions, the Drive Date is going to auto calculate by TexLinx. If a Drive Date different from the TexLinx auto calculation is needed, you must click this checkbox to override the Drive Date that calculates and enter the Drive Date you want to use in the Drive Date field.

**How the data sheet looks for three containers so far:**

<table>
<thead>
<tr>
<th>Box Size</th>
<th>Inclusive Date Range*</th>
<th>Drive Date*</th>
<th>Override</th>
<th>Agency Box #*</th>
<th>Beginning File</th>
<th>Ending File Range*</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>RC</td>
<td>03/01/2014-02/28/2015</td>
<td>02/28/2015</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RC</td>
<td>03/01/2014-02/28/2015</td>
<td>02/28/2015</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RC</td>
<td>03/01/2014-02/28/2015</td>
<td>02/28/2015</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Boxes: Use ‘Data Sheet’ to Build Multiple Boxes

*Agency Box #

Agency Box # is the identification number you assign to this container. The Agency Box # can be numbers, letters, symbols, or any combination thereof. The only restriction: Do not use a Pipe symbol | as part of the Agency Box #. The Pipe symbol is explained below in Beginning File | Ending File Range.

**TEX SAYS** To accommodate letters and symbols in addition to numbers, this is a text field.

*Data Example: 775*

*Beginning File | Ending File Range*

The Beginning File | Ending File Range is composed of the first and last item in the box. The Pipe symbol is used as a separator between the beginning file name and the ending file name. The Pipe symbol is created by holding down SHIFT on the keyboard and pressing the backslash key ( SHIFT \ ).

**TEX SAYS** If the Beginning File and the Ending File are the same, enter SAME as the Ending File name.

In the below example, a space appears before and after the Pipe for illustrative purposes only.

*Data Example: File 550 | File 935*

**Notes**

Notes is an optional field used by the agency to assist users to remember something about the box or about the contents of the box.

*Data Example: Lake Travis parks and trails*

---

**How the data sheet looks for three containers when completed**

<table>
<thead>
<tr>
<th>Box Box #</th>
<th>Inclusive Date Range</th>
<th>Due Date</th>
<th>Override</th>
<th>Agency Box #</th>
<th>Beginning File</th>
<th>Ending File Range</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>RC</td>
<td>02/01/2014-02/28/2015</td>
<td>2/28/2015</td>
<td></td>
<td>775</td>
<td>File 550</td>
<td>File 935</td>
<td></td>
</tr>
<tr>
<td>RC</td>
<td>02/01/2014-02/28/2015</td>
<td>2/28/2015</td>
<td></td>
<td>976</td>
<td>File 935</td>
<td>File 995</td>
<td></td>
</tr>
<tr>
<td>RP-45</td>
<td>02/01/2014-02/28/2015</td>
<td>2/28/2015</td>
<td></td>
<td>Mag363</td>
<td>Lake Travis</td>
<td>Same</td>
<td>Lake Travis parks and trails</td>
</tr>
</tbody>
</table>
Completed: Create New Boxes data sheet:

Fields marked with an * are required.

When the data sheet is complete, the next step is to Save the information. These two options are located at the Create New Boxes data sheet’s top right:

- **Save & New**: Use this to create another set of boxes on a new data sheet.
- **Save & Close**: Use this if:
  - You want to save the information you have entered for these boxes or
  - You have been using Save & New and this is the final data sheet.

Creating Boxes dialogue box

If the above dialogue box does not appear telling you how many boxes are to be created, you are returned to the Create New Boxes data sheet screen. An error message appears at the top of the data sheet screen. Correct the error and click the save option you selected. When the above screen appears, Click OK. Then, if you selected:

- **Save & New**: Another Create New Boxes data sheet screen appears. Some fields carried forward from the previous box created but all fields are editable.
- **Save & Close**: The boxes have been saved in TexLinx and the Boxes homepage appears. Turn to Request Pickup to ask the State Records Center to pickup your items if you are ready to make the request.

**TEX SAYS** When you click OK, it might appear nothing is happening but do not click OK more than once or TexLinx will duplicate the number of boxes you are creating.
Boxes:
Use ‘Records Series’ to Build Boxes

1. Click the **Records Series** item type tab.
2. Enter search terms into any of the **Quick Search** fields to find the Record Series.
3. Click **Search**. (continue on the next page)
   OR
4. Click **Search and View**.
5. Select **Search**. (continue below)

**Search Records Series screen**

Enter search information into any fields to find the Record Series Title for which you want to build boxes. Press **Execute**. If your search does not yield the Record Series Title you need (as seen on the next page), contact your agency’s Records Management Officer for assistance.
Boxes: Use 'Records Series' to Build Boxes

Search Results screen

Regardless of the Search method you used from the previous page, the above screen is your next destination. Look to the Record Series Title column (1) and click the hyperlinked text in the Organization Quick Description column (2) to open the Record Series.

View a Record Series screen

This is the View a Record Series screen. Click Create a New Box for this Record Series (3).
1. Select the **Organization** within your agency that this box is associated.
2. The Record Series Title you chose from the Records Series tab is a non-editable field.

At this point, continue the process by turning to Page 25 in the section **Boxes: Use ‘Create’ to Build Boxes** and choose the Box Size.
Boxes: Use ‘Records Series’ to Build Boxes

NOTES
There are three ways to build files in TexLinx:

I. **Create Files from the Files Tab** — if the Box the file goes into is not at your agency or if the Box has not been created in TexLinx. (Begins below)

II. **Create Files from the Boxes Tab** — if the Box exists in TexLinx and the box is at your agency. (Begins on Page 52)

III. **Create Files Using Data Sheet** — to create multiple files without having to click Save & New after each file is created (Begins on Page 57).

**TEX SAYS** Creating files in TexLinx is optional and not required. There are a couple of good reasons to create files in TexLinx:

- It is an electronic inventory of your files and shows the boxes where they are assigned.
- To request a file delivery from the State Records Center, the file must appear in TexLinx (as explained on page 133).

### I: CREATE FILES FROM THE FILES TAB

1. Click the **Files** item type tab.
2. Click **Data Manipulation** in the Action Menus.
3. Select **Create** from the dropdown menu.

**CREATE A NEW FILE screen**
Files

1. All fields with an asterisk (*) are required fields. The page cannot process without completing these required fields.
2. TexLinx cannot be used to place files from your agency into a box that is currently at the State Records Center (SRC). To add files to a box stored at the SRC, request delivery for that box.

*Organization

Select the Organization within the agency associated with this file by clicking the button on the left side of the screen or use the Quick Search fields (1) to reduce the number of options. The Organization selected here should match the Organization associated with the box it is associated.

If you do not see the organization you need, the organization does not exist in TexLinx or your permissions do not allow you to see that organization. Contact the Records Management Officer at your agency to resolve this issue.

*Agency File Name

Agency File Name is the name you assign to the file. Any character can be used except for the Pipe symbol (as explained in the Boxes sections, also in Appendix: Definitions).

Data Example: Acuff, M 8563

Agency Sub File Name

Agency Sub File Name is an optional field for additional information assigned to the file.

Data Example: Exam results (FY15)

How these fields look when completed:
File Notes is an optional field for information on this file.  
Data Example: passed all exams on first attempt

How the screen looks when all fields are completed:
When the fields are complete, the next step is to Save the information.
These three options are located at the Create a New File screen’s top right:

- **Save & New**: Use this to create another file.
- **Save & View**: Use this if you are ready to place the file in a box that exists in TexLinx and is at your agency.
- **Save & Close**: Use this if:
  1. You have been entering information and you are not yet ready to place the file into a box.
  2. You have been selecting Save & New and you are ready to place the file(s) into a box that exists in TexLinx.
  3. You are not ready to place this file into a box because:
     a. The box is at the State Records Center.
     b. The box does not exist in TexLinx.

**Creating File dialogue box**

If the above dialogue box does not appear, and you are returned to the Create a New File screen, an error message appears at the top of the screen. Correct the error message and click the save option you selected.

When the above screen appears, it includes the File Barcode that was generated for this file. The File Barcode is the unique identification number applied to each item created in TexLinx. Click OK. Then, if you selected:

- **Save & New**: Another Create a New File screen appears. The Organization field carries forward from the previous file created but it is editable.
- **Save & View**: View a File is the screen for you to review the file you just created. The file has been saved in TexLink. Continue on Page 48 (**A. Transferring Files to a Box**) to place the file into a box that is at your agency and the box exists in TexLinx.
- **Save & Close**: The file(s) has/have been saved in TexLinx and the File homepage appears.

Continue on the next page to place the file into a box that is at your agency.

**TEX SAYS** Boxes at the State Records Center cannot have new files added to them. If the box you want to place the file(s) is at the State Records Center, request the box to be delivered so you may add the file(s) to the box — you will not need to re-create the file(s) in TexLinx, follow the steps beginning on page 48 (**A. Transferring Files to a Box**) to place the file into the box in TexLinx when the box is delivered to you. Turn to **Request Delivery from the State Records Center: Boxes, Disaster Recovery, Microfilm Reels, Microfiche Bundles, and Files** to learn how to complete a delivery request for a box that is at the State Records Center.
Files

Place files into a box at your agency

If the files you just created do not appear in the homepage grid on the Files item type tab page:
1. Enter search information into the Quick Search fields.
2. Click Search and continue on the next page.
   OR
3. Click Search and View.
4. Select Search and continue below.
   **TEX SAYS** See Appendix: Search for tips and shortcuts when using Search.

**Search Files screen**

Complete any fields (even those in Infolinx System Fields) to find the files you need.
Once you enter your Search information, click Execute.
These are the files found as a result of your Search.
To select individual files, click the checkbox of that item (1).
To select all files on this screen, click the select all checkbox in the orange ribbon (2).

**TEX SAYS** A setting in Preferences could limit the number of files that appear on a single screen page. Clicking the Select All checkbox selects the items on this single page, not the items on every page (if there is more than one page noted above the orange ribbon). To increase/decrease the number of files viewable on a single screen page:
1. Click Preferences at the top of the screen in the Navigation Menu.
2. Click Home Page.
3. Edit the number that appears in the field for **Number of records per page displayed in grid**.
4. Click Save.

Adjusting this setting in Preferences results in the homepage grid on all item type tabs to be adjusted.

## A. Transferring Files to a Box

After you have selected the file(s) you want to place into a box:
3. Click Activity.
4. Select Transfer.
The Transfer Items screen. This details the files you have selected (1) to place into a box. To find the box in TexLinx, click Search (2).

**TEX SAYS** Do not click the checkbox for Make Home Location (3) at any point in this process. The system will activate this checkbox later in the process.

Search Tabs

When you click the Search button, the above Search tabs appear. Click the Boxes tab. Remember, the white tab is the tab you where you are working. Orange tabs are the ones where you are not working.
Complete any of the Quick Search fields (1) to find the Box where you want to place the File(s) and click Search (2).

Select the Box

Select the box you want to place the file(s) by clicking the button on the left (1). Remember, boxes with 4 in the Current Location column (2) are at the State Records Center (SRC) and cannot have files added to them. If that is where the file to be placed, click Cancel at the top right to stop the transfer and request the box to be delivered from the SRC so you can add the file to the box.

**TEX SAYS** The Organization names for the box and the file should agree.
Final Step: Transfer the File(s) to the Box

The page refreshes with the Box you selected (1). Click Transfer (2) to complete the process.

Message dialogue box

The above message appears telling you the transfer to the box is complete.
II: CREATE FILES FROM THE BOXES TAB

Search for the box where you want to create a file:
1. Click the Boxes Item Type Tab.
2. Enter search information into the **Quick Search** fields.
3. Click **Search** and continue on the next page.
   OR
4. Click **Search and View**.
5. Select **Search** and continue below.

**TEX SAYS** See Appendix: Search for tips and shortcuts for using Search.

Search Boxes screen

Complete any fields (even those in **Infolinx System Fields**) to find the box you need. Once you enter your Search information, click **Execute**.
Selecting the Box

Select the box that you want to create a file by clicking the hypertext link in the Box Barcode column.

Two things to remember:
1. Files can be added to one box at a time.
2. Boxes with 1 in the Current Location column are at the State Records Center and they are prohibited from having files added to them. If you need to add a file to any box that is at the State Records Center, request the box to be delivered. Turn to Request Delivery from the State Records Center: Boxes, Disaster Recovery, Microfilm Reels, Microfiche Bundles, and Files* to learn how to complete a delivery request for a box.

Creating a File from the View a Box page

On the View a Box screen, scroll down the page (1) to find the green file icon. Click Add New (2).
Files

Create a New File screen

**Organization**

*Organization* populates based upon the Organization assignment for the box.

**Agency File Name**

*Agency File Name* is the name you assign to the file. Any character can be used except for the Pipe symbol (as explained in the Boxes sections, also in Appendix: Definitions).

*Data Example:* Print Requests ending 2016-01-15

**Agency Sub File Name**

*Agency Sub File Name* is an optional field for additional information assigned to the file outside of the Agency File Name.

*Data Example:* Employee Incentives

*How these fields look when completed:*
**File Notes** is an optional field for information on this file.  
**Data Example:** First half of January 2015

---

**How these fields look when completed:**

*Organization:* Texas Big State Agency - 988 - Central

*Agency File Name:* Print Requests ending 2016-01-15

*Agency Sub File Name:* Employee Incentives

*File Notes:* First half of January 2015
When the fields are complete, the next step is to Save the information. These three options are located at the Create a New File screen’s top right:

- **Save & New**: Use this to create another file for this box.
- **Save & View**: Use this to review the file you just created and to see the box where it is located (1) in TexLinx.
- **Save & Close**: Use this if:
  - You have entered information for one file and it is the only file you need to add to this box OR
  - You have selected Save & New and this is the last file to add to this box.

### Creating File dialogue box

If the above dialogue box does not appear, and you are returned to the Create a New File screen, an error message appears at the top of the screen. Correct the error message and click the save option you selected.

When the above screen appears, it includes the File Barcode that was generated for this file. The File Barcode is the unique identification number applied to each item created in TexLinx. Click **OK**. Then, if you selected:

- **Save & New**: Another Create a New File screen appears. The Organization field carries forward from the previous file created but it is editable.
- **Save & View**: View a File is the screen for you to review the file you just created and to see the box information where the file is located (as illustrated above) in TexLinx.
- **Save & Close**: The file has been saved in TexLinx and the file has been placed into the box in TexLinx.
III: CREATE FILES USING DATA SHEET

Data Sheet is used in the style of a spreadsheet to create multiple Files that you will then assign to a box or boxes.

1. Click the Files item type tab.
2. Click Data Manipulation in the Action Menus.
3. Select Create from the dropdown menu.

Create New Files data Sheet
Files

All fields with an asterisk (*) are required fields. The page cannot process without completing these required fields.

**Organization**

Select the Organization within the agency associated with this set of files by clicking the button on the left side of the screen or use the Quick Search fields (1) to reduce the number of options. If you do not see the organization you need, the organization does not exist in TexLinx or your permissions do not allow you to see that organization. Contact the Records Management Officer at your agency to resolve this issue.

Data Fields

There are up to four data field columns to complete for each line of information on the Data Sheet. Most of these are completed the same way they were in the earlier areas of this section; the only

Setting up the Data Sheet

The data sheet has as many available file data entry rows as your Preferences allow. Keep in mind that the data sheet processes with file data entry rows that have no information. But if you need extra container data entry rows, there is an easy way to adjust that. To increase/decrease the number of file data entry lines in the data sheet:

1. click Preferences at the top of the screen in the Navigation Menu.
2. click Home Page.
3. edit the number that appears in the field for Number of records per page displayed in grid.
4. click Save.

*Activate File Row Checkbox

The first thing to do when creating a file using Data Sheet is to click the checkbox (1) on the left side of the data sheet for each file you are creating. If you have changed your Preferences in the earlier step so that your data sheet uses every row to create a file, click the checkbox (2) at the top of the data sheet on the left side of the column label names. This automatically activates each container row. Any line activated with a checkbox must be completed when the data sheet is processed. Do not click the checkbox for more containers than you need.
Files

*Agency File Name

Agency File Name is the name you assign to the file. Any character can be used except for the Pipe symbol (as explained in the Boxes sections, also in Appendix: Definitions).
Data Example: File 2379

Agency Sub File Name

Agency Sub File Name is an optional field for additional information assigned to the file.
Data Example: Router 82

File Notes

File Notes is an optional field for information on this file.
Data Example: June-Sept 2015

How these fields look when completed:
Files

Saving

When the fields are complete, the next step is to **Save** the information. These three options are located at the Create a New File screen’s top right:

- **Save & New**: Use this to create another Data Sheet.
- **Save & Close**: Use this if you do not need to complete another Data Sheet.

**Creating File dialogue box**

If the above dialogue box does not appear telling you how many boxes are to be created, you are returned to the Create New Boxes data sheet screen. An error message appears at the top of the data sheet screen. Correct the error and click the save option you selected.

When the above screen appears, **Click OK**. Then, if you selected:

- **Save & New**: Another Create New Files data sheet screen appears. The Organization field carried forward from the previous files created but the Organization field is editable.
- **Save & Close**: The files have been saved in TexLinx and the Files homepage appears. **If you are ready to transfer the files to a box, continue on to the next page.**

**TEX SAYS** When you click OK, it might appear nothing is happening but do not click OK more than once or TexLinx will duplicate the number of files you are creating.
Transfering Files to a Box

Two rules to remember when transferring Files into a Box in TexLinx:
1. The Organization for the Box should match the Organization for the Files.
2. Files are transferred to one Box at a time.

Place files into a box at your agency

If the files you just created do not appear in the homepage grid on the Files item type tab page:
1. Enter search information into the Quick Search fields.
2. Click Search and continue on the next page.
   OR
3. Click Search and View.
4. Select Search and continue below.

   TEX SAYS See the Appendix section Search on tips and shortcuts for using Search.

Search Files screen

Complete any fields (even those in Infolinx System Fields) to find the files you need.
Once you enter your Search information, click Execute.
These are the files found as a result of your Search.
To select individual files, click the checkbox of that item (1).
To select all files on this screen, click the select all checkbox in the orange ribbon (2).

TEX SAYS  A setting in Preferences could limit the number of files that appear on a single screen page. Clicking the Select All checkbox selects the items on this single page, not the items on every page (if there is more than one page noted above the orange ribbon). To increase/decrease the number of files viewable on a single screen page:
1. Click Preferences at the top of the screen in the Navigation Menu.
2. Click Home Page.
3. Edit the number that appears in the field for Number of records per page displayed in grid.
4. Click Save.

Adjusting this setting in Preferences results in the homepage grid on all item type tabs to be adjusted.

A. Transferring Files to a Box

After you have selected the file(s) you want to place into a box:
3. Click Activity.
4. Select Transfer.
B. Transfer Items screen

The Transfer Items screen. This details the files you have selected (1) to place into a box. To find the box in TexLinx, click Search (2). Do not click the checkbox for Make Home Location (3) at any point in this process. The system will activate this checkbox later in the process.

Search Tabs

When you click the Search button, the above Search tabs appear. Click the Boxes tab. Remember, the white tab is the tab you are working. Orange tabs are the ones where you are not working.

Search Tabs: Boxes

Complete any of the Quick Search fields (1) to find the Box where you want to place the File(s) and click Search (2).
Select the box you want to place the file(s) by clicking the button on the left (1). Remember, boxes with ✗ in the Current Location column (2) are at the State Records Center and cannot have files added to them. Also, remember the Organization (Agency Name and Division) for Files should match the Organization for Boxes. If the Box where you want to place the Files is at the State Records Center, request the box to be delivered from the State Records Center so you can add the file to the box.

**Final Step: Transfer the File(s) to the Box**

The page refreshes with the Box you selected (1). **Make Home Location** is checked (2) automatically. Click **Transfer** (3) to complete the process.
Files

**Message dialogue box**

The above message tells you the transfer of Files to the Box is complete. Click OK and you are returned to the Files homepage grid. You can see the Files’ Current Location is in the Box you selected.
Disaster Recovery: Create

1. Click the Disaster Recovery item type tab.
2. Click Data Manipulation in the Action Menus.
3. Select Create from the dropdown menu.

Create a new Disaster Recovery screen
Disaster Recovery: Create

**TEX SAYS** All fields with an asterisk (*) are required fields. The page cannot process without completing these required fields.

**Organization**

Select the **Organization** within the agency associated with this box by clicking the button on the left side of the screen or use the Quick Search fields (1) to reduce the number of options. **TEX SAYS** If you do not see the organization you need, the organization does not exist in TexLinx or your permissions do not allow you to see that organization. Contact the Records Management Officer at your agency to resolve this issue.

**Agency Container #**

**Agency Container #** is the identification number you assign to this container. This is an optional field. The Agency Container # can be numbers, letters, symbols, or any combination thereof. The only restriction: Do not use a Pipe symbol | as part of the Agency Container #. The Pipe symbol is used in other tabs for Beginning File | Ending File Range.

**Data Example:** 988-0012

**Box Type**

**Box Type** is the size of the Disaster Recovery box created in TexLinx.

- 2RB: larger than the size of one Records Center box up to two Records Center boxes.
- 3RB: the size of up to three Records Center boxes.
- 4RB: the size of up to four Records Center boxes.
- 5RB: the size of up to five Records Center boxes.
- RC: regular-sized Records Center box (1.2 cubic foot box).

**TEX SAYS** A State Records Center employee will confirm Box Size and make corrections, if needed.

**How these parts look when completed:**

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**TEX SAYS** All fields with an asterisk (*) are required fields. The page cannot process without completing these required fields.

**Organization**

Select the **Organization** within the agency associated with this box by clicking the button on the left side of the screen or use the Quick Search fields (1) to reduce the number of options. **TEX SAYS** If you do not see the organization you need, the organization does not exist in TexLinx or your permissions do not allow you to see that organization. Contact the Records Management Officer at your agency to resolve this issue.

**Agency Container #**

**Agency Container #** is the identification number you assign to this container. This is an optional field. The Agency Container # can be numbers, letters, symbols, or any combination thereof. The only restriction: Do not use a Pipe symbol | as part of the Agency Container #. The Pipe symbol is used in other tabs for Beginning File | Ending File Range.

**Data Example:** 988-0012

**Box Type**

**Box Type** is the size of the Disaster Recovery box created in TexLinx.

- 2RB: larger than the size of one Records Center box up to two Records Center boxes.
- 3RB: the size of up to three Records Center boxes.
- 4RB: the size of up to four Records Center boxes.
- 5RB: the size of up to five Records Center boxes.
- RC: regular-sized Records Center box (1.2 cubic foot box).

**TEX SAYS** A State Records Center employee will confirm Box Size and make corrections, if needed.

**How these parts look when completed:**
Return Type is the Disaster Recovery box’s method of delivery from the State Records Center. Will Call is the only option currently available. Someone from your agency must use TexLinx to request delivery when you want this box returned from the State Records Center.

**TEX SAYS** *The Disaster Recovery request to pickup/delivery schedule is as follows:*

- Requests submitted from 11 a.m.-3p.m. will be picked up/delivered the morning of the following regularly-scheduled workday (Monday-Friday).
- Requests submitted after 3 p.m. will be picked up/delivered during the afternoon on the following regularly-scheduled workday (Monday-Friday).
- Requests submitted until 11 a.m. (Monday-Friday) will be picked up/delivered that afternoon.

Notes is an optional field used by the agency to assist users to remember something about the box or about the contents of the box.

*Data Example:* Tapes are confidential.

**How the Create a New Disaster Recovery screen looks when all fields are complete:**

[Image of the Create a New Disaster Recovery screen]
Disaster Recovery: Create

**Saving**

When the fields are complete, the next step is to **Save** the information. These three options are located at the Create a New Disaster Recovery screen’s top right:

- **Save & New**: Use this to create another Disaster Recovery box.
- **Save & View**: Use this if you have entered only one Disaster Recovery box and you are ready to make a Request Pickup.
- **Save & Close**: Use this if:
  - You have been selecting Save & New for a set of Disaster Recovery boxes and you are ready to make a Request Pickup for the boxes.
  - or
  - You want to save the information you have entered for the Disaster Recovery box(es) but you are not yet ready to make a Request Pickup for the box(es).

**Creating Disaster Recovery dialogue box**

If the above dialogue box does not appear, and you are returned to the Create a New Disaster Recovery screen, an error message appears at the top of the screen. Correct the error and click the save option you selected.

When the above screen appears, it includes the Box Barcode that was generated for this Disaster Recovery box. The Box Barcode is the unique identification number applied to each item created in TexLinx. Click **OK**. Then, if you selected:

- **Save & New**: Another Create a New Disaster Recovery screen appears.
- **Save & View**: View a Disaster Recovery is the screen for you to review the box you just created. The Disaster Recovery box is saved in TexLink. Turn to **Request Pickup** to ask the State Records Center to pickup the Disaster Recovery box if you are ready to make the request.
- **Save & Close**: If you have been clicking Save & New to create a series of Disaster Recovery Boxes, the boxes have been saved in TexLinx and the Disaster Recovery homepage appears. Turn to **Request Pickup** to ask the State Records Center to pickup your items if you are ready to make the request.
Disaster Recovery: Create

NOTES
Microforms: Use ‘Create’ to Build Microfilm

Create is used to create one or many microfilm reels one container at a time.

Some information about Microforms

The Microforms item type tab is defined in TexLinx as:

- **16mm Microfilm**
  - 16-2.5mm (16 millimeter film with a film thickness of 2.5 mil)
  - 16-5mm (16 millimeter film with a film thickness of 5 mil)
- **35mm Microfilm**
- **Microfiche**

1. Click the Microforms item type tab.
2. Click Data Manipulation in the Action Menus.
3. Select Create from the dropdown menu.
Create a new Microforms

Fields marked with an * are required.

*Organization:

Agency Name
Division Name
Business Unit Name
Business Sub-Unit Name
Organization Nickname

Search Here:
Go:

Current Search: No current Organization query. To search Organization, enter your criteria and click the search button.

*Record Series:

Organization Quick Description
AIN
RSIN
Record Series Title
Event Based
Years

Search Here:

Month
Days
Event Trigger
Archival
Vital
Remarks

Legal Citations
Approve Status

Current Search: No current Record Series query. To search Record Series, enter your criteria and click the search button.

*Film Type:

*Film Size:

*Inclusive Date Range:

*Drive Date:

Override:

*Agency Reel #:

*Beginning File | Ending File Range:

Fiche Count:

Image Count:

Addition:

Notes:
Microforms: Use ‘Create’ to Build Microforms

All fields with an asterisk (*) are required fields. The page cannot process without completing these required fields.

*Organization

Select the Organization within the agency associated with the microfilm reel(s) by clicking the button on the left side of the screen or use the Quick Search fields (1) to reduce the number of options.

If you do not see the organization you need, the organization does not exist in TexLinx or your permissions do not allow you to see that organization. Contact the Records Management Officer at your agency to resolve this issue.

Imaging Production

Imaging Production is used by the State Records Center when creating storage items produced in Imaging Production. You do not data enter information into this field.

How these fields look when completed:
**Record Series**

Record Series is the Record Series Title on the agency’s Records Retention Schedule the microfilm reel(s) are to be assigned. Select the Record Series Title by clicking the button on the left side of the screen. Initially, every Record Series available for storage appears. Use the Quick Search fields (1) to narrow the selection of available Record Series Titles.

**TEX SAYS** If there is a Record Series you need that does not appear, contact your agency’s Records Management Officer to resolve this issue.

**Film Type**

Film Type: The only two options for microfilm stored at the State Records Center are:
- **Duplicate-Silver**: More durable microfilm used for archival and permanent information.
- **Original**: The first generation of a roll of microfilm.

**TEX SAYS** The other options not available for microfilm storage at the State Records Center are used either for microfiche or for Imaging Production.

How these fields look when completed:
**Film Size**

The only options for microfilm are:
- MR16-2.5 MIL: 16 millimeter film with a thickness of 2.5 mil
- MR16-5 MIL: 16 millimeter film with a thickness of 5 mil
- MR35: 35 millimeter film

The other options not available for microfilm storage at the State Records Center are used either for microfiche or for Imaging Production.

**Inclusive Date Range**

The Inclusive Date Range can be completed in one of two ways:
- Use the same beginning and ending date information for all microfilm reels to be created (if more than one reel is being created). This method results in the same Eligible Destruction Date for all of the reels.
- Use a unique set of beginning and ending inclusive dates for each microfilm reel to be created. This method results in a different Eligible Destruction Date for each reel.

The date information is entered in this format with no spaces:
MM/DD/YYYY-MM/DD/YYYY

If the Beginning Date and the Ending Date are the same, you must enter the same date twice. Example: 12/31/2015-12/31/2015.

Data Example: 01/01/2012-09/30/2015 or 1/1/2012-9/30/2015 or 1/1/12-9/30/12

**How these fields look when completed:**

*Film Size: MR35

*Inclusive Date Range: 01/01/2012-09/30/2015
Microforms: Use ‘Create’ to Build Microforms

*Drive Date

Enter a date MM/DD/YYYY or click the Calendar Icon to select a Drive Date. The Drive Date is used in conjunction with Total Retention (Event Based, Years, Months, Days) to calculate an Eligible Destruction Date.

**TEX SAYS** Do not use a hyphen within the date. Please see Appendix: Calculate the Drive Date for more information.

Data Example: 08/01/2015

Override

Override is an optional tool to change the Drive Date when an automatic calculation occurs under these two conditions:

- FE or CE is used in Event Based on the agency's Records Retention Schedule.
- Only years and/or months and/or days are the Total Retention on the agency’s Records Retention Schedule (and no acronym used as Event Based).

Under either of those two conditions, the Drive Date is going to auto calculate by TexLinx. If a Drive Date different from the TexLinx auto calculation is needed, you must click this checkbox to override the Drive Date that calculates and enter the Drive Date you want to use in the Drive Date field.

*Agency Reel #

Agency Reel # is the identification number you assign to this microfilm reel. The Agency Reel # can be numbers, letters, symbols, or any combination thereof. The only restriction: Do not use a Pipe symbol | as part of the Agency Reel #. The Pipe symbol is explained in Beginning File | Ending File Range.

Data Example: Reel 16

How these fields look when completed:

*Drive Date: 09/30/2015

Override: □

*Agency Reel #: Reel 16

78
Microforms: Use 'Create' to Build Microforms

*Beginning File | Ending File Range

The **Beginning File | Ending File Range** is composed of the first image on the microfilm reel and the last image on the reel. The Pipe symbol is used as a separator between the beginning file and the ending file. The Pipe symbol is created by holding down SHIFT on the keyboard and pressing the backslash key ( SHIFT \ ).

**TEX SAYS: If the Beginning File and the Ending File are the same, enter SAME as the Ending File name.**

*In the below example, a space appears before and after the Pipe for illustrative purposes only.*

**Data Example:** 2012 Survey | 2015 Survey

**Fiche Count**

**Fiche Count** is used for microfiche only. **You do not enter information into this field.**

**Image Count**

**Image Count** is used by the State Records Center. **You do not enter information into this field.**

**Addition**

**Addition** is used by the State Records Center. **You do not data enter information into this field.**

**Notes**

**Notes** is an optional field to assist users to remember something about this microfilm reel.

**Data Example:** 2015 Survey thru the end of September

**How these fields look when completed:**


Fiche Count:

Image Count:

Addition:

Notes: 2015 Survey thru the end of September
Microforms: Use 'Create' to Build Microforms

Completed: Create a New Microforms screen:

![Image of TexLinx microforms creation screen]

- **Organization**
  - Texas Big State Agency - 988 - Central

- **Imaging Production**

- **Record Series**

- **Film Type:** Original
- **Film Size:** MR35

- **Inclusive Date Range:** 1/1/2012 to 9/30/2015
- **Drive Date:** 9/30/2015
- **Agency Reel #:** Real 16

- **Beginning File:**
- **Ending File:**

- **Fiche Count:**
- **Image Count:**

- **Addition:**

- **Notes:** 2015 Survey thru the end of September

**Legend:**
- A: Original
- C: Correction
- D: Draft
- E: Enlargements
- F: Final
- P: Public
- R: Redaction
- W: Working Draft
- TN: Temporary
- C: Copy
- D: Digital
- F: Final
- L: Line
- M: Memo
- Q: Query
- R: Reel
- S: Script
- T: Transcription
- U: U.S. Government
- W: White
- X: Excerpt
- Y: Index
- Z: Zipped
- 0-9: Numbers
- A-Z: Letters
Microforms: Use 'Create' to Build Microforms

Saving

When the fields are complete, the next step is to **Save** the information. These three options are located at the Create a New Microforms screen’s top right:

- **Save & New**: Use this to create another microfilm reel.
- **Save & View**: Use this if you have entered only one microfilm reel and you are ready to make a Request Pickup.
- **Save & Close**: Use this if:
  - You have been selecting Save & New for a set of microfilm reels and you are ready to make a Request Pickup for the reels.
  - You want to save the information you have entered for the microfilm reel(s) but you are not yet ready to make a Request Pickup for the reel(s).

**Creating Microform dialogue box**

If the above dialogue box does not appear, and you are returned to the Create a New Microform screen, an error message appears at the top of the screen. Correct the error and click the save option you selected.

When the above screen appears, it includes the Microform Barcode that was generated for this microfilm reel. The Microform Barcode is the unique identification number applied to each item created in TexLinx. Click **OK**. Then, if you selected:

- **Save & New**: Another Create a New Microform screen appears. Some fields carried forward from the previous reel created but all fields are editable.
- **Save & View**: View a Microform is the screen to review the microfilm reel you just created. The reel has been saved in TexLink. Turn to **Request Pickup** to ask the State Records Center to pickup the reel if you are ready to request pickup.
- **Save & Close**: The microfilm reel(s) has/have been saved in TexLinx and the Microforms homepage appears. Turn to **Request Pickup** to ask the State Records Center to pickup your microfilm reel(s) if you are ready to make the request.
Microforms: Use ‘Create’ to Build Microfiche Bundles

Create is used to create one or many microfiche bundles one container at a time.

Some information about Microforms

The Microforms item type tab is defined in TexLinx as:

- 16mm Microfilm
  - 16-2.5mm (16 millimeter film with a film thickness of 2.5 mil)
  - 16-5mm (16 millimeter film with a film thickness of 5 mil)
- 35mm Microfilm
- Microfiche

Bundle Microfiche Jackets

It is a good rule to bundle microfiche jackets before data entering the information into TexLinx. A jacket is a single sheet of microfiche containing many images of microfilm sliced and inserted into microfiche jackets. A bundle is a small collection of microfiche jackets using the same Record Series Title that have been manually separated from a large amount of microfiche jackets.

- Separate the microfiche jackets into bundles. It is a good way to get organized and this helps the State Records Center research and pull microfiche jackets or microfiche bundles when a delivery request is received.
- The bundles can be divided into any amount you like but a good measure is to keep each bundle to less than 200 microfiche jackets.
- When you are completing TexLinx data entry, each bundle you create is a separate container and you need to know the amount of microfiche jackets you have in each bundle.

TEX SAYS When the Imaging Department at the State Records Center creates microfiche jackets from microfilm reels and returns them to an agency, a bundle is created from each reel. If the microfiche jackets are not in protective envelopes, please place an empty envelope or index card at the start and end of each bundle. It is highly suggested that jackets be placed in envelopes.

1. Click the Microforms item type tab.
2. Click Data Manipulation in the Action Menus.
3. Select Create from the dropdown menu.
Microforms: Use ‘Create’ to Build Microfiche Bundles

CREATE A NEW MICROFORMS screen
**Microforms: Use ‘Create’ to Build Microfiche Bundles**

**TEX SAYS** All fields with an asterisk (*) are required fields. The page cannot process without completing these required fields.

**Organization**

Select the **Organization** within the agency associated with the microfiche bundle(s) by clicking the button on the left side of the screen or use the Quick Search fields (1) to reduce the number of options.

**TEX SAYS** If you do not see the organization you need, the organization does not exist in TexLinx or your permissions do not allow you to see that organization. Contact the Records Management Officer at your agency to resolve this issue.

**Imaging Production**

**Imaging Production** is used by the State Records Center when creating storage items produced in Imaging Production. **You do not enter information into this field.**

**How these fields look when completed:**

[Table and form images are shown, with options and fields labeled for organization and imaging production.]
**Record Series** is the Record Series Title on the agency’s Records Retention Schedule the microfiche bundle(s) is/are to be assigned. Select the Record Series Title by clicking the button on the left side of the screen. Initially, every Record Series available for storage appears. Use the Quick Search fields (1) to narrow the selection of available Record Series Titles.

**TEX SAYS** If there is a Record Series you need that does not appear, contact your agency’s Records Management Officer to resolve this issue.

**Film Type**

Film Type: Select Microfiche.

**TEX SAYS** The other options not available for microfiche storage at the State Records Center are used either for microfilm or for Imaging Production.

How these fields look when completed:
Microforms: Use ‘Create’ to Build Microfiche Bundles

*Film Size

*Film Size:

Microfiche
MR16-2.6 MIL
MR16-5 MIL
MR35
Scan - B&W 200 DPI
Scan - B&W 300 DPI
Scan - B&W 400 DPI
Scan - B&W 600 DPI
Scan Large Format - 200-300 DPI
Scan Large Format - up to 600 DPI
Scan Microfiche to digital
Scan Microform to Digital

Film Size: Select Microfiche.

TEX SAYS The other options not available for microfiche storage at the State Records Center are used either for microfilm or for Imaging Production.

*Inclusive Date Range

The Inclusive Date Range can be completed in one of two ways:
- Use the same beginning and ending date information for all microfiche bundles to be created (if more than one bundle is being created). This method results in the same Eligible Destruction Date for all of the reels.
- Use a unique set of beginning and ending inclusive dates for each microfiche bundle to be created. This method results in a different Eligible Destruction Date for each bundle.

The date information is entered in this format with no spaces:
MM/DD/YYYY-MM/DD/YYYY

If the Beginning Date and the Ending Date are the same, you must enter the same date twice.
Example: 12/31/2015-12/31/2015.

Data Example: 10/15/1998-08/31/2015 or 10/15/1998-8/31/2015 or 10/15/98-8/31/15

*Drive Date

Enter a date MM/DD/YYYY or click the Calendar Icon to select a Drive Date. The Drive Date is used in conjunction with Total Retention (Event Based, Years, Months, Days) to calculate an Eligible Destruction Date.

TEX SAYS Do not use a hyphen within the date. Please see Appendix: Calculate the Drive Date for more information.

Data Example: 08/01/2015

How these fields look when completed:

*Film Size: MICROFICHE

*Inclusive Date Range: [10/15/1998-08/31/2015]

*Drive Date: [08/31/2015]
Override

Override is an optional tool to change the Drive Date when an automatic calculation occurs under these two conditions:
- FE or CE is used in Event Based on the agency's Records Retention Schedule.
- Only years and/or months and/or days are the Total Retention on the agency’s Records Retention Schedule (and no acronym used as Event Based).

Under either of those two conditions, the Drive Date is going to auto calculate by TexLinx. If a Drive Date different from the TexLinx auto calculation is needed, you must click this checkbox to override the Drive Date that calculates and enter the Drive Date you want to use in the Drive Date field.

*Agency Reel #

Agency Reel # is the identification number you assign to this microfiche bundle. The Agency Reel # can be numbers, letters, symbols, or any combination thereof. The only restriction: Do not use a Pipe symbol | as part of the Agency Reel #. The Pipe symbol is explained in Beginning File | Ending File Range.

Data Example: FJ Alden

*Beginning File | Ending File Range

The Beginning File | Ending File Range is composed of the first microfiche jacket in the bundle and the last microfiche jacket in the bundle. The Pipe symbol is used as a separator between the beginning file and the ending file. The Pipe symbol is created by holding down SHIFT on the keyboard and pressing the backslash key (SHIFT \).

**TEX SAYS** If the Beginning File and the Ending File are the same, enter SAME as the Ending File name.

In the below example, a space appears before and after the Pipe for illustrative purposes only.
Data Example: Alden 10/98 | Zimms 08/15

*Fiche Count

*Fiche Count is the number of microfiche jackets in this bundle.

Data Example: 58

How these fields look when completed:

Override:

*Agency Reel #: FJ Alden

*Beginning File | Ending File Range: Alden 10/98 | Zimms 08/15

*Fiche Count: 58
Microforms: Use ‘Create’ to Build Microfiche Bundles

**Image Count**

Image Count is used by the State Records Center to reflect the number of images in a microfiche bundle created in Imaging Production. **You do not data enter information into this field.**

**Addition**

Addition is used by the State Records Center when images are added to an existing microfiche bundle. **You do not data enter information into this field.**

**Notes**

Notes is an optional field used by the agency to assist users to remember something about this microfiche bundle. *Data Example: Missing September 2005, appears in FJ Anderson*

How these fields look when completed:

- **Image Count:**
- **Addition:**
- **Notes:**
Microforms: Use ‘Create’ to Build Microfiche Bundles

Completed: Create a New Microforms screen:
When the fields are complete, the next step is to Save the information. These three options are located at the Create a New Microforms screen’s top right:

- **Save & New**: Use this to create another microfiche bundle.
- **Save & View**: Use this if you have entered only one microfiche bundle and you are ready to make a Request Pickup.
- **Save & Close**: Use this if:
  - You have been selecting Save & New to create a series of microfiche bundles and you are ready to make a Request Pickup for the bundles.
  - You want to save the information you have entered for the microfiche bundle(s) but you are not yet ready to make a Request Pickup for the bundle(s).

### Creating Microform dialogue box

If the above dialogue box does not appear, and you are returned to the Create a New Microform screen, an error message appears at the top of the screen. Correct the error and click the save option you selected.

When the above screen appears, it includes the Microform Barcode that was generated for this bundle of microfiche. The Microform Barcode is the unique identification number applied to each item created in TexLinx. Click **OK**. Then, if you selected:

- **Save & New**: Another Create a New Microform screen appears. Some fields carried forward from the previous reel created but all fields are editable.
- **Save & View**: View a Microform is the screen for you to review the microfiche bundle you just created. The bundle has been saved in TexLink. Turn to **Request Pickup** to ask the State Records Center to pickup the bundle if you are ready to make the request.
- **Save & Close**: The microfiche bundle(s) has/have been saved in TexLinx and the Microforms homepage appears. Turn to **Request Pickup** to ask the State Records Center to pickup your microfiche bundle(s) if you are ready to make the request.
<table>
<thead>
<tr>
<th>NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td></td>
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<td></td>
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<tr>
<td></td>
</tr>
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<td></td>
</tr>
</tbody>
</table>
Microforms:
Use ‘Data Sheet’ to Build Multiple Microfilm Reels

Data Sheet is used to create multiple microfilm reels for a single Organization and for a single Record Series Title using a format similar to a spreadsheet. Multiple film sizes and inclusive dates can also be used on the Data Sheet. This is an alternative to using Create, Save & New.

Some information about Microforms

The Microforms item type tab is defined in TexLinx as:

- 16mm Microfilm.
  - 16-2.5mm (16 millimeter film with a film thickness of 2.5 mil).
  - 16-5mm (16 millimeter film with a film thickness of 5 mil).
- 35mm Microfilm.
- Microfiche.

1. Click the Microforms item type tab.
2. Click Data Manipulation in the Action Menus.
3. Select Data Sheet from the dropdown menu.

TEX SAYS Be mindful of the 20-minute timer at the top of the screen. If you start a data sheet and go for a period of time without clicking a radio button or saving your information, TexLinx times-out your login and your information is lost. You can always select Save & Close to save the information you have entered, move the items to the cart, and come back later to finish. If you do not place them in the cart, you will have to perform a Search to find the items you saved.
Microforms: Use ‘Data Sheet’ to Build Multiple Microfilm Reels

**CREATE NEW MICROFORMS data sheet**

![Image of a data sheet interface]

<table>
<thead>
<tr>
<th>Filter Type</th>
<th>Filter Value</th>
<th>Inclusion Data Reels</th>
<th>Drill Down</th>
<th>Displayed</th>
<th>Agency Name</th>
<th>Enclosure</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Microforms: Use ‘Data Sheet’ to Build Multiple Microfilm Reels

**TEX SAYS** All fields with an asterisk (*) are required fields. The page cannot process without completing these required fields.

### *Organization*

Select the **Organization** within the agency associated with the microfilm reels by clicking the button on the left side of the screen or use the Quick Search fields (1) to reduce the number of options. **TEX SAYS** If you do not see the organization you need, the organization does not exist in TexLinx or your permissions do not allow you to see that organization. Contact the Records Management Officer at your agency to resolve this issue.

### Imaging Production

Imaging Production is used by the State Records Center when creating storage items produced in Imaging Production. **You do not enter information into this field.**

### *Record Series*

**Record Series** is the Record Series Title on the agency’s Records Retention Schedule that is assigned to the microfilm reels. Select the Record Series Title by clicking the button on the left side of the screen. Initially, every Record Series available for storage appears. Use the Quick Search fields (1) to narrow the selection of available Record Series Titles. **TEX SAYS** If there is a Record Series you need that does not appear, contact your agency’s Records Management Officer to resolve this issue.
Microforms: Use ‘Data Sheet’ to Build Multiple Microfilm Reels

How these fields of the data sheet look when completed:

<table>
<thead>
<tr>
<th>Data Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>There are up to ten data field columns to complete for each row of information on the data sheet. Most of these are completed the same way they were in Microforms: Use ‘Create’ to Build Microfilm. The only exception is a checkbox to activate each container data entry row. <strong>Columns</strong> are the sections of data found horizontally, left to right. <strong>Rows</strong> are sections of data found vertically, top to bottom.</td>
</tr>
</tbody>
</table>

Setting up the data sheet

The data sheet has as many available container data entry rows as your Preferences allow. Keep in mind that the data sheet can process with container data entry rows that have no information. But if you need extra container data entry rows, there is an easy way to adjust that.

To increase/decrease the number of container data entry lines in the data sheet:
1. click **Preferences** at the top of the screen in the Navigation Menu.
2. click **Home Page**.
3. edit the number that appears in the field for **Number of records per page displayed in grid**.
4. click **Save**.

96
Microforms: Use ‘Data Sheet’ to Build Multiple Microfilm Reels

*Activate Container Row Checkbox

The first thing to do when creating a container using data sheet is to click the checkbox (1) on the left side of the data sheet for each container you are creating. If you have changed your Preferences in the earlier step so that your data sheet uses every row to create a container, click the checkbox (2) at the top of the data sheet on the left side of the column label names. This automatically activates each container row.

*Film Type

Film Type: The only two options for microfilm stored at the State Records Center are:
- **Duplicate-Silver**: More durable microfilm used for archival and permanent information.
- **Original**: The first generation of a roll of microfilm.

The other options are either not eligible to be stored at the State Records Center or they are used in conjunction with Imaging Production.

It is possible to have a different Film Type for some or all containers on the same data sheet. The other options not available for microfilm storage at the State Records Center are used either for microfiche or for Imaging Production.

How these fields of the data sheet look when completed:
Microforms: Use ‘Data Sheet’ to Build Multiple Microfilm Reels

*Film Size*

Film Size: The only options for microfilm are:
- MR16-2.5 MIL: 16 millimeter film with a thickness of 2.5 mil
- MR16-5 MIL: 16 millimeter film with a thickness of 5 mil
- MR35: 35 millimeter film

*Inclusive Date Range*

The Inclusive Date Range can be completed in one of two ways:
- **Use the same beginning and ending date information for all microfilm reels to be created.** This method results in the same Eligible Destruction Date for all of the reels.
- **Use a unique set of beginning and ending inclusive dates for some or all of the microfilm reels to be created.** This method results in a different Eligible Destruction Date for each box. The date information is entered in this format with no spaces: MM/DD/YYYY-MM/DD/YYYY. If the Beginning Date and the Ending Date are the same, you must enter the same date twice.

Example: 12/31/2015-12/31/2015.

As with Film Type and Film Size, the Inclusive Dates on the data sheet can be the same or a different set of dates for each container. Do not use hyphens within each date, use the hyphen only to separate the dates.

**Data Example:** 01/01/2014-12/31/2014 or 1/1/2014-12/31/2014 or 1/1/14-12/31/14

How these fields of the data sheet look when completed:
Microforms: Use ‘Data Sheet’ to Build Multiple Microfilm Reels

**Drive Date**

The **Drive Date** is a required field. Enter a date MM/DD/YYYY or click the Calendar Icon to select a Drive Date. The Drive Date is used in conjunction with Total Retention (Event Based, Years, Months, Days) to calculate an Eligible Destruction Date.

*TEX SAYS* Do not use a hyphen within the date. Please see Appendix: Calculate the Drive Date for more information.

**Data Example:** 12/31/2014

**Override**

**Override** is an optional tool to change the Drive Date when an automatic calculation occurs under these two conditions:
- FE or CE is used in Event Based on the agency's Records Retention Schedule.
- Only years and/or months and/or days are the Total Retention on the agency’s Records Retention Schedule (and no acronym used as Event Based).

Under either of those two conditions, the Drive Date is going to auto calculate by TexLinx. If a Drive Date different from the TexLinx auto calculation is needed, you must click this checkbox to override the Drive Date that calculates and enter the Drive Date you want to use in the Drive Date field.

**Agency Reel #**

**Agency Reel #** is the identification number you assign to this microfilm reel. The Agency Reel # can be numbers, letters, symbols, or any combination thereof. The only restriction: Do not use a Pipe symbol | as part of the Agency Reel #. The Pipe symbol is explained in Beginning File | Ending File Range.

**Data Example:** 51

---

**How these fields of the data sheet look when completed:**

<table>
<thead>
<tr>
<th>Drive Date</th>
<th>Override</th>
<th>Agency Reel #</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/31/2014</td>
<td></td>
<td>51</td>
</tr>
<tr>
<td>12/31/2014</td>
<td></td>
<td>52</td>
</tr>
<tr>
<td>12/31/2014</td>
<td></td>
<td>18</td>
</tr>
</tbody>
</table>
Microforms: Use ‘Data Sheet’ to Build Multiple Microfilm Reels

*Beginning File | Ending File Range*

The **Beginning File | Ending File Range** is composed of the first image on the reel of film and the last image on the reel of film. The Pipe symbol is used as a separator between the beginning file and the ending file. The Pipe symbol is created by holding down SHIFT on the keyboard and pressing the backslash key (SHIFT \).

TEX SAYS If the Beginning File and the Ending File are the same, enter SAME as the Ending File name.
In the below example, a space appears before and after the Pipe for illustrative purposes only.
**Data Example:** Ticket #856 | Ticket #935

**Fiche Count**

**Fiche Count** is used for microfiche only. Leave this field empty for microfilm.

**Notes**

**Notes** is an optional field used by the agency to assist users to remember something about this microfilm reel.
**Data Example:** Combined film reels 51 and 52

How these fields of the data sheet look when completed:

<table>
<thead>
<tr>
<th>Beginning File</th>
<th>Ending File Range*</th>
<th>Fiche Count</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ticket #856</td>
<td>Ticket #935</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ticket #936</td>
<td>Ticket #999</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ticket #858</td>
<td>Ticket #999</td>
<td>Combined film reels 51 and 52</td>
<td></td>
</tr>
</tbody>
</table>
Microforms: Use ‘Data Sheet’ to Build Multiple Microfilm Reels

Completed: Create a New Microforms data sheet:
Microforms: Use ‘Data Sheet’ to Build Multiple Microfilm Reels

**Saving**

When the fields on the data sheet are complete, the next step is to **Save** the information. These two options are located at the Create New Microforms data sheet’s top right:

- **Save & New**: Use this to create another set of microfilm reels on a new data sheet.
- **Save & Close**: Use this if:
  - You selected Save & New for a set of microfilm reels and you are ready to make a Request Pickup for the reels.
  - You want to save the information you have entered for the microfilm reels but you are not yet ready to make a Request Pickup for the reels.

**Creating Microform dialogue box**

If the above dialogue box does not appear telling you how many microfilm reels are to be created, you are returned to the Create New Microforms data sheet screen. An error message is at the top of the data sheet screen. Correct the error and click the save option you selected.

When the above screen appears, Click **OK**. Then, if you selected:

- **Save & New**: Another Create New Microforms data sheet appears. Some fields carried forward from the previous microfilm reels created but all fields are editable.
- **Save & Close**: The microfilm reels have been saved in TexLinx and the Microforms homepage appears. Turn to **Request Pickup** to ask the State Records Center to pickup your items if you are ready to make the request.

**TEX SAYS** *When you click OK, it might appear nothing is happening but do not click OK more than once or TexLinx will duplicate the number of items you are creating.*
Microforms:
Use ‘Data Sheet’ to Build Multiple Microfiche Bundles

Data Sheet is used to create multiple microfiche bundles for a single Organization and for a single Record Series Title using a format similar to a spreadsheet. Multiple inclusive dates can be used on the Data Sheet. This is an alternative to using Create, Save & New.

Some information about Microforms

The Microforms item type tab is defined in TexLinx as:

- **16mm Microfilm**
  - **16-2.5mm** (16 millimeter film with a film thickness of 2.5 mil)
  - **16-5mm** (16 millimeter film with a film thickness of 5 mil)
- **35mm Microfilm**
- **Microfiche**

**Bundle Microfiche Jackets**

It is a good rule to bundle microfiche jackets before data entering the information into TexLinx. A **jacket** is a single sheet of microfiche containing many sections of microfilm sliced and inserted into microfiche jackets. A **bundle** is a small collection of microfiche jackets using the same Record Series Title that has been manually separated from a large amount of microfiche jackets.

- Separate the microfiche jackets into bundles. It is a good way to get organized and this helps the State Records Center research and pull microfiche jackets or microfiche bundles when a delivery request is received.
- The bundles can be divided into any amount you like, but a good measure is to keep each bundle to less than 200 microfiche jackets.
- When you are entering data into TexLinx, each bundle you create is a separate container and you will need to know the amount of microfiche jackets you have in each bundle.

**TEX SAYS** When the Imaging Department at the State Records Center creates microfiche jackets from microfilm reels and returns them to an agency, a bundle is created from each reel. If the microfiche jackets are not in protective envelopes, please place an empty envelope or index card at the start and end of each bundle. It is highly encouraged that jackets be placed in envelopes.
1. Click the Microforms item type tab.
2. Click Data Manipulation in the Action Menus.
3. Select Data Sheet from the dropdown menu.

CREATE NEW MICROFORMS data sheet

TEX SAYS Be mindful of the 20-minute timer at the top of the screen. If you start a data sheet and go for a period of time without clicking a radio button or saving your information, TexLinx times-out your login and your information is lost. You can always select Save & Close to save the information you have entered, move the items to the cart, and come back later to finish. If you do not place them in the cart, you will have to perform a Search to find the items you saved.
Microforms: Use ‘Data Sheet’ to Build Multiple Microfiche Bundles

TEX SAYS All fields with an asterisk (*) are required fields. The page cannot process without completing these required fields.

*Organization

Select the **Organization** within the agency associated with the microfiche bundles by clicking the button on the left side of the screen or use the Quick Search fields (1) to reduce the number of options.

TEX SAYS If you do not see the organization you need, the organization does not exist in TexLinx or your permissions do not allow you to see that organization. Contact the Records Management Officer at your agency to resolve this issue.

Imaging Production

**Imaging Production** is used by the State Records Center when creating storage items produced in Imaging Production. **You do not enter information into this field.**

*Record Series

**Record Series** is the Record Series Title on the agency’s Records Retention Schedule that the microfiche bundles are assigned. Select the Record Series Title by clicking the button on the left side of the screen. Initially, every Record Series available for storage appears. Use the Quick Search fields (1) to narrow the selection of available Record Series Titles.

TEX SAYS If there is a Record Series you need that does not appear, contact your agency’s Records Management Officer to resolve this issue.
Microforms: Use ‘Data Sheet’ to Build Multiple Microfiche Bundles

How these parts of the data sheet look when completed:

<table>
<thead>
<tr>
<th>Organization</th>
<th>Texas Big State Agency - 988</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search Here</td>
<td>Agency Name: Division Name: Business Unit Name: Sub Business Unit Name: Organization Nickname:</td>
</tr>
<tr>
<td>Current Search:</td>
<td>There is no current Organization query. To search Organization, enter your criteria and click the Search button.</td>
</tr>
<tr>
<td>Page 1</td>
<td>Jump to Page: Go</td>
</tr>
</tbody>
</table>

Data Fields

There are up to ten data field columns to complete for each row of information on the data sheet. Most of these are completed the same way they were in Microforms: Use ‘Create’ to Build Microfiche Bundles. The only exception is a checkbox to activate each container data entry row.

Columns are the sections of data found horizontally, left to right. Rows are sections of data found vertically, top to bottom.

Setting up the data sheet

The data sheet has as many available container data entry rows as your Preferences allow. Keep in mind that the data sheet processes with container data entry rows that have no information. But if you need extra container data entry rows, there is an easy way to adjust that.

To increase/decrease the number of container data entry lines in the data sheet:
1. click Preferences at the top of the screen in the Navigation Menu.
2. click Home Page.
3. edit the number that appears in the field for Number of records per page displayed in grid.
4. click Save.
Microforms: Use ‘Data Sheet’ to Build Multiple Microfiche Bundles

TEX SAYS All fields with an asterisk (*) are required fields. The page cannot process without completing these required fields.

**Activate Container Row Checkbox**

The first thing to do when creating a container using data sheet is to click the checkbox (1) on the left side of the data sheet for each container you are creating. If you have changed your Preferences in the earlier step so that your data sheet uses every row to create a container, click the checkbox (2) at the top of the data sheet on the left side of the column label names. This automatically activates each container row.

TEX SAYS Any row activated with a checkbox is required to be completed when the data sheet is processed. So do not click the checkbox for more containers than you are needing.

**Film Type**

Film Type option is: **Microfiche**

TEX SAYS The other options not available for microfiche storage at the State Records Center are used either for microfilm or for Imaging Production.

**Film Size**

Film Size option is: **Microfiche**

TEX SAYS The other options not available for microfiche storage at the State Records Center are used either for microfilm or for Imaging Production.

**How these fields of the data sheet look when completed:**
Microforms: Use 'Data Sheet' to Build Multiple Microfiche Bundles

*Inclusive Date Range

The Inclusive Date Range can be completed in one of two ways:
- Use the same beginning and ending date information for all created microfiche bundles. This method results in the same Eligible Destruction Date for all of the bundles.
- Use a unique set of beginning and ending inclusive dates for some or all of the microfiche bundles to be created. This method results in a different Eligible Destruction Date for each box. The date information is entered in this format with no spaces: MM/DD/YYYY-MM/DD/YYYY. If the Beginning Date and the Ending Date are the same, you must enter the same date twice.

**Example:** 12/31/2015-12/31/2015.

As with Film Type and Film Size, the Inclusive Dates on the data sheet can be the same or a different set of dates for each container. Do not use hyphens within each date, use the hyphen only to separate the dates.

**Data Example:** 09/01/2013-08/31/2014 or 9/1/2013-8/31/2014 or 9/1/14-8/31/14

*Drive Date

Enter a date MM/DD/YYYY or click the Calendar Icon to select a Drive Date. The Drive Date is used in conjunction with Total Retention (Event Based, Years, Months, Days) to calculate an Eligible Destruction Date.

**Example:** 08/31/2014

**Override**

Override is an optional tool to change the Drive Date when an automatic calculation occurs under these two conditions:
- FE or CE is used in Event Based on the agency's Records Retention Schedule.
- Only years and/or months and/or days are the Total Retention on the agency’s Records Retention Schedule (and no acronym used as Event Based).

Under either of those two conditions, the Drive Date is going to auto calculate by TexLinx. If a Drive Date different from the TexLinx auto calculation is needed, you must click this checkbox to override the Drive Date that calculates and enter the Drive Date you want to use in the Drive Date field.

How these fields of the data sheet look when completed:
Microforms: Use ‘Data Sheet’ to Build Multiple Microfiche Bundles

**Agency Reel #**

*Agency Reel #* is the identification number you assign to this microfiche bundle. The Agency Reel # can be numbers, letters, symbols, or any combination thereof. The only restriction: Do not use a Pipe symbol | as part of the Agency Reel #. The Pipe symbol is explained in Beginning File | Ending File Range.

*Data Example*: Pages 1-36

**Beginning File | Ending File Range**

The *Beginning File | Ending File Range* is composed of the first microfiche jacket in the bundle and the last microfiche jacket in the bundle. The Pipe symbol is used as a separator between the beginning file and the ending file. The Pipe symbol is created by holding down SHIFT on the keyboard and pressing the backslash key ( SHIFT \ ).

**TeX Says** If the Beginning File and the Ending File are the same, enter SAME as the Ending File name.

*In the below example, a space appears before and after the Pipe for illustrative purposes only.*

*Data Example*: Administration | Maintenance

**Fiche Count**

*Fiche Count*: Enter the total number of microfiche jackets in this bundle. This is a required field for microfiche.

*Data Example*: 36

How these fields of the data sheet look when completed:
Notes is an optional field used by the agency to assist users to remember something about this microfiche bundle.

Data Example: Disposal Management appears out of order on Page 32

Completed: Create New Microforms data sheet:
Microforms: Use ‘Data Sheet’ to Build Multiple Microfiche Bundles

Saving

When the fields on the data sheet are complete, the next step is to Save the information. These two options are located at the Create New Microforms data sheet’s top right:

- **Save & New**: Use this to create another set of microfiche bundles on a new data sheet.
- **Save & Close**: Use this if:
  - You have selected Save & New for a set of microfiche bundles and you are ready to make a Request Pickup.
  - You want to save the information you have entered for the microfiche bundles but you are not yet ready to make a Request Pickup.

**Creating Microform dialogue box**

If the above dialogue box does not appear telling you how many microfiche bundles are to be created, you are returned to the Create New Microforms data sheet screen. An error message is at the top of the data sheet screen. Correct the error and click the save option you selected. When the above screen appears, Click OK. Then, if you selected:

- **Save & New**: Another Create New Microforms data sheet appears. Some fields carried forward from the previous microfiche bundles created but all fields are editable.
- **Save & Close**: The microfiche bundles have been saved in TexLinx and the Microforms homepage appears. Turn to Request Pickup to ask the State Records Center to pickup your items if you are ready to make the request.

TEX SAYS *When you click OK, it might appear nothing is happening but do not click OK more than once or TexLinx will duplicate the number of items you are creating.*
Microforms:
Use ‘Records Series’ to Build Microfilm Reels and Microfiche Bundles

1. Click the Records Series item type tab.
2. Enter search terms into any of the Quick Search fields to find the Record Series for the microform(s).
3. Click Search. (continue on the next page).
   OR
4. Click Search and View.
5. Select Search. (continue below)

Search Records Series screen

Enter search information into any fields to find the Record Series Title for which you want to build the microform(s). Press Execute. If your search does not yield the Record Series Title you need (as seen on the next page), contact your agency’s Records Management Officer for assistance.
Microforms: Use ‘Records Series’ to Build Microfilm Reels and Microfiche Bundles

Search Results screen

Regardless of the Search method you used from the previous page, the above screen is your next destination.

Look to the Record Series Title column (1) and click the hyperlinked text in the Organization Quick Description column (2) to open the Record Series.

View a Record Series screen

This is the View a Record Series screen. Click Create a New Microform for this Record Series (3).
1. Select the **Organization** within your agency that this microform is associated.
2. The Record Series Title you chose from the Records Series tab is a non-editable field.

At this point, continue with to build this microform by selecting the Film Type:
- **Microfilm**: Turn to Page 76, *Microforms: Use ‘Create’ to Build Microfilm*.
- **Microfiche**: Turn to Page 86, *Microforms: Use ‘Create’ to Build Microfiche Bundles*. 

117
Microforms: Use ‘Records Series’ to Build Microfilm Reels and Microfiche Bundles

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118
Request Pickup: from Your Agency

Requesting Pickup for boxes, files, disaster recovery, microfilm reels, and microfiche bundles* is done the same way for each medium but there are two ways to do this depending upon where you are in the process of creating information or returning items to the State Records Center:

- From the View a Box (or Disaster Recovery, or Microform) screen immediately after clicking Save & View (as seen below) from the single item’s Create screen — continue below.
  
  *TEX SAYS* Files are excluded from this option since files cannot be created in TexLinx and sent to a box that is at the State Records Center. Please see the section for *Files*.

- By performing Search (turn to Page 120 of this section); this is done:
  - to return files, boxes, disaster recovery, or microforms (reels of microfilm and complete microfiche bundles*) to the State Records Center.
  - to request first-time pickup for any number of boxes, disaster recovery containers, or microforms at any point after they have been created in TexLinx and are being sent to the State Records Center for the first time.

*TEX SAYS* For microfiche jacket returns to the State Records Center that were not delivered as the full bundle, see the section Request Pickup: Returning Microfiche Partial Bundles to the SRC.

After clicking Save & View

After you create an item and click Save & View and click OK after the item’s Barcode dialogue box appears, the View a Box (or Disaster Recovery, or Microform) is the next screen. This is where you can review the information you just entered.

To begin the Request Pickup process:

1. Click Activity.
2. Select Request Pickup

Turn to Request Items to be Picked Up screen, page 122.
Request Pickup: From Your Agency

Use Search

1. Click the item type tab you are wanting to **Search** (in this example, the Boxes tab is being used).
2. Enter search terms into any of the **Quick Search** fields to find the box or boxes.
3. Click **Search**. (continue on Page 121, **Search Results screen**).
   OR
4. Click **Search and View**.
5. Select **Search** (continue below).

**Search Boxes screen**

Enter search information into any fields (including the **Infotlix System Fields** on the bottom half of the screen) to find the item(s) that you want to request pickup. Press **Execute**.
Regardless of the search method used from the previous page, the above screen is your next destination.

Click the checkbox (1) for the containers you want to request pickup. You can see from the Current Location column (2) which boxes are currently with you or someone at your agency. If you see (3) in the Current Location column, that indicates the box is already at the State Records Center. Click the checkbox (4) on the orange ribbon if you want to select all* of the containers.

* The grid has as many container rows as your Preferences allow. If you need to see or request all of the containers you have searched but they are on multiple pages (5), increase/decrease the number of containers shown:

1. click Preferences at the top of the screen in the Navigation Menu.
2. click Home Page.
3. edit the number that appears in the field for Number of records per page displayed in grid.
4. click Save.

After clicking the appropriate checkbox(es) for the item(s) to be picked up from your agency:

1. Click Activity.
2. Select Request Pickup.
Depending upon if you are sending items to the State Records Center for the first time (above) or returning items to the SRC (below), your screen looks similar to the illustration above or the illustration below.

**Sending items to the State Records Center (SRC) for the first time:**
Your screen looks similar to the above illustration. SRC (and the SRC barcode) appears in the Home Location (1) and Destination (2) columns.

**Returning items to the State Records Center (SRC):**
Your screen looks similar to the below illustration. The Home Location (3) is the secure symbol that prevents you from seeing the exact location within the SRC where it was located and the Destination (4) is the barcode for the shelf (or the box in the case of returning files) where it was in the SRC.

*TEX SAYS* Since the information is treated the same in both examples, the first illustration is what is used for the remainder of this section.
1. **Page Information**: This displays how many screen pages the requested pickup items appear. Ten items per page is the maximum. All items on all pages will be processed with this request.
2. **Change Destination**: These APPLY buttons are not used on this screen.
3. **Record Description**: The item barcode and the container number.
4. **Current Location**: The Current Location defaults to the person who created the item(s) in TexLinx or to the person who received them as a delivery from the State Records Center.
5. **Home Location**: The Home Location depends upon if this is a pickup request for an item to be stored at the State Records Center (SRC) for the first time, or if it is returning to the SRC.
   - **New SRC storage item(s)**: the SRC (and the SRC barcode).
   - **Item(s) returning to the SRC**: the Secure Location symbol
6. **Destination**: The Destination depends upon if this is a pickup request for item(s) to be stored at the State Records Center for the first time, or if this is a pickup request for item(s) returning to the SRC.
   - **New storage item(s)**: the SRC (and the SRC barcode)
   - **Item(s) returning to the SRC**: the barcode location where the item originated at the State Records Center.
7. **Search Location**: This function is not used on this screen.
8. **Comments**: Type NEW ACCESSION if this is a pickup request for an item that has not been stored at the SRC. Also use this field to select an alternative pickup location or person. See example at the top of the next page.
9. **Recent Request Destinations**: Do not use information from this field because the Destination for the items on this screen is going to be the State Records Center, not anyone at your agency.
10. **Request button**: Click this when this screen is complete and you are satisfied with the information you are providing.
Modifying the Pickup Location

If the pickup location is not at your location, enter the other contact person’s name, location at your agency, and phone number here. Include any additional information that may assist the driver from the State Records Center. If an employee at the Texas Big State Agency named Johnny Agency wanted to change the pickup location at his agency to his coworker Jane Division:

Comments: NEW ACCESSION -- Jane Division, Office 1289, 512-555-5000
Ring buzzer on the loading dock.

Request Results screen

This details what you just submitted to be picked up at your agency.
The Request Pickup process is complete. Click **OK** to return to the homepage grid.

To cancel any Request, please see Appendix: Cancel a Request (Pickup or Delivery).
Request Pickup: Returning Microfiche Partial Bundles to the SRC

The process to Request Pickup for microfiche partial bundles (microfiche jackets that were delivered to you as the result of a Fiche Circulation you created in TexLinx), is similar to returning most items to the State Records Center. From the Fiche Circulation tab’s homepage, perform a Search to find the microfiche jackets to return to the State Records Center.

TEX SAYS For microfiche jacket returns to the State Records Center that were delivered to you as the full bundle, see the section Request Pickup: From Your Agency. This section is used only for Microfiche Requests that were created using the Fiche Circulation tab.

Use Search

1. Click the Fiche Circulation item type tab.
2. Enter search terms into any of the Quick Search fields to find the Fiche Circulation that was created to deliver these fiche to your agency.
3. Click Search. (continue to the bottom of Page 128, Search Results screen).
   OR
4. Click Search and View.
5. Select Search (continue on the top of the next page).
Search Fiche Circulation screen

Enter search information into any fields (including the **Infolinx System Fields**, scroll to the bottom half of the screen) to find the Fiche Circulation that was used to deliver the microfiche jackets to you. Press **Execute**.

Search Results screen

Regardless of the Search method you used from the previous page, the above illustration is the next screen. Find the Fiche Circulation that was created during the delivery process. You can see the Fiche Circulation items that are in your possession by looking to the Current Location column (1). Your name will appear in this column. In this example Fiche Circulation Barcode 0000819233 is in Johnny Agency’s possession (2). The Notes column (3) will detail the Fiche Circulation information. To view more details, click the Barcode (4) for that item. Click the checkbox (3) for the Fiche Circulation you want to return to the State Records Center.
After you have selected the Fiche Circulation(s) you want to return to the State Records Center, click Activity (1) the select Request Pickup (2).

Request Items to be picked up screen

1. **Page Information**: This displays how many screen pages the requested pickup items appear. Ten items per page is the maximum. All items on all pages will be processed with this request.
2. **Change Destination**: This APPLY button is not used on this screen.
3. **Record Description**: The Fiche Circulation barcode and the Organization assigned to it.
4. **Current Location**: The Current Location defaults to the person who currently has this Fiche Circulation. If this information is not accurate or if the Fiche Circulation is to be picked up in another location, see Comments below.
5. **Home Location**: The Home Location is the Microfiche Bundle stored at the State Records Center.
6. **Destination**: The Destination is the Microfiche Bundle stored at the State Records Center.
7. **Search Location**: This function is not used on this screen.
8. **Comments**: Use this field to provide information that will assist the driving picking up this Fiche Circulation. Also, use this field if this Fiche Circulation is to be picked up from a location other than the person listed as the Current Location on this screen.
9. **Recent Request Destinations**: Do not use information from this field because the Destination for the items on this screen is going to be the State Records Center, not anyone at your agency.
10. **Request button**: Click this when this screen is complete and you are satisfied with the information you are providing.
This details what you just submitted to be picked up at your agency. The Request Pickup process is complete. Click OK to return to the homepage grid.

To cancel any Request, please see Appendix: Cancel a Request (Pickup or Delivery).
Request Pickup: Returning Microfiche Partial Bundles to the State Records Center

NOTES
Request Delivery:  
from the State Records Center  
Boxes, Disaster Recovery, Microfilm Reels, Microfiche Bundles, and Files*

*Files that already appear in TexLinx

Requesting Delivery for boxes, disaster recovery, files, microfilm reels, or microfiche bundles is done the same way for each item type. The reason there are three sections for Request Delivery is because the process is different for files that already exist in TexLinx (that request is completed in this section) than the process for when the files do not currently exist in TexLinx (that request process is explained in the section Request Delivery from the State Records Center: Files not already entered into TexLinx). There is also a slightly different process to request delivery of microfiche jackets that are part of a microfiche bundle. That process is explained in the section Request Delivery from the State Records Center: Microfiche Jackets.

TEX SAYS While the process is similar for all tabs where information in TexLinx appears, in this section, the Boxes tab is used in the illustrations.

To find the item(s) you need delivered from the State Records Center, there are two ways to perform a search:

A. 1. Click the item type tab you want to search.
   2. Enter search terms into any of the Quick Search fields to find the item at the SRC.
   3. Click Search and continue to Search Results screen, Page 134.

OR

B. 4. Click Search and View.
   5. Select Search and continue to Search Boxes screen, Page 134.
Enter search information into any fields (including the **Infolinx System Fields** on the bottom half of the screen) to find the item(s) that you want to request delivery. Press **Execute**.

Regardless of the Search method you used from the previous page, the above illustration is the next screen.

Click the checkbox (1) for the containers you want to request delivery. You can see from the **Current Location** column (2) which boxes are currently with you or someone at your agency. If you see (3) in the Current Location column, that indicates the box is at the State Records Center. Click the checkbox (4) on the orange ribbon if you want to select all* of the containers.

* **TEX SAYS** The grid has as many container rows as your Preferences allow. If you need to see or request all of the containers you have searched but they are on multiple pages (5), increase/decrease the number of containers shown:

1. click **Preferences** at the top of the screen in the Navigation Menu.
2. click **Home Page**.
3. edit the number that appears in the field for **Number of records per page displayed in grid**.
4. click **Save**.
After clicking the appropriate checkbox(es) for the item(s) to be delivered:
1. Click Activity.
2. Select Request Delivery.

Sections on the Request Items screen

1. **Page Information**: This displays how many screen pages the requested pickup items span. Ten items per page is the maximum. If the list of containers is more than one page, all of the containers still process together with this single request.
2. **Record Description**: Each item you clicked the checkbox on the previous screen is listed here.
3. **Enter Number of Files**: This field is not used for this process.
4. **Delivery Destination**: This is the person who is to receive these containers.
   **TEX SAYS** If the person who is to receive the containers is someone other than the person listed here, turn to page 136, *Changing the Delivery Destination*.
5. **Comments**: Enter information here to assist the State Records Center driver delivering your items.
6. **Alternate Fulfillment Method**: Used for rush delivery or Permanent Transfers.
   **TEX SAYS** For more information about Alternate Fulfillment Method, turn to Page 137.
Changing the Delivery Destination

In the above illustration, Johnny Agency is the delivery destination (1). Sometimes a person other than yourself is the delivery destination. To make this adjustment, click **Search (2)** and continue below to search for the person who is the delivery destination.

**TEX SAYS** *If this dialogue box appears below the Alternate Fulfillment Method field:*

When you clicked Search from the previous illustration, a Search portal appears. To search for the individual at your agency who is the delivery destination, enter information for that person in any of the **Quick Search** fields (1) and click **Search (2)**.

**Data Example:** Jane (in First Name) Division (in Last Name)

When a list of names appears, click the button to the left of the person who is to be assigned as the Delivery Destination for this delivery request.

**TEX SAYS** *If you do not see the person you want to assign as the delivery destination, contact your agency’s Records Management Officer.*

When Johnny Agency selected Jane Division as the Delivery Destination, her name replaced his name as the delivery location.
Use the Comments field to provide information that will assist the delivery driver from the State Records Center. **Data Example:** Jane’s office#1289; phone#512-555-5000 but Charlie can sign for the delivery.

**Alternate Fulfillment Method**

There are two options here:

- **Rush:** If this is a rush delivery, select this option. *This incurs an additional fee. See Tex Says below for additional instruction.*
- **Permanent Withdrawal:** Select this if the item(s) (boxes, microfilm reels, complete microfiche bundles, or disaster recovery items) are never to be returned to the State Records Center. *This incurs an additional fee unless this is for files or Disaster Recovery boxes.*

For more information on Alternate Fulfillment Method, please see **Appendix: Alternate Fulfillment Method.**

**TEX SAYS** (1) Leave this field empty if this is a standard delivery. (2) When selecting RUSH delivery, call the SRC Circulation Desk (512-475-5155) after submitting this request so the State Records Center is aware of this RUSH delivery.

Johnny Agency assigned Jane Division (1) as the delivery destination for this box. He also included her office location and her office phone number and an additional person who can sign for the delivery in the Comments field (2). He did not need to make this a Rush or a Permanent Withdrawal (3).

Once the screen is complete, click **Request (4).**
Request Delivery from SRC: Boxes, Disaster Recovery, Microfilm Reels, Microfiche Bundles, & Files*

Request Results screen

This tells you the Request Delivery was successfully submitted. The person assigned as the delivery destination will receive these items usually within one Monday-Friday workday for a regular (non-Rush) delivery. Click **OK** to return to the homepage grid of the item type tab from where this request was generated.

If someone else had already requested delivery for this item, you would see the below message instead of the above successful message:

**Waitlist**

If you want to receive the item after it is returned to the State Records Center, you do not need to do anything. The delivery will be processed when the item is returned to the SRC.

If you want to cancel this delivery request, turn to **Appendix: Cancel a Request (Pickup or Delivery)**.

To cancel any Request, please see **Appendix: Cancel a Request (Pickup or Delivery)**.
Request Delivery from SRC: Boxes, Disaster Recovery, Microfilm Reels, Microfiche Bundles, & Files

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Request Delivery: from the State Records Center
Files not already entered into TexLinx

If you searched for a file under the Files item type tab (or viewed the box and did not find the file) that you want delivered from a box that is at the State Records Center but the file does not exist in TexLinx, you need to create the file in TexLinx before you can request it. You can do this from the Boxes item type tab. If the file already exists in TexLinx, do not continue in this section; see the section Request Delivery from the State Records Center: Boxes, Disaster Recovery, Microfilm Reels, Microfiche Bundles, and Files*.

Find the Items to Request Delivery

To start the file request process in TexLinx, you must find the box by performing a search. There are two ways to do this:

A. 1. Click the **Boxes** item type tab.
    2. Enter search terms into any of the **Quick Search** fields to find the box at the SRC.
    3. Click **Search** and continue to **Search Results screen** on Page 142.

   OR

B. 4. Click **Search and View**.
    5. Select **Search** and continue below

Search Boxes screen

Enter search information into any fields (including the **Infolinx System Fields** on the bottom half of the screen) to find the box where you want to create a file delivery request. Press **Execute**.
Regardless of the Search method used from the previous page, the above illustration is your next screen.

Click the checkbox (1) for the box where you know the file is located at the State Records Center. You can see from the Current Location column (2) which boxes are at the SRC, they have " in the Current Location column (3).

After you click the checkbox for the box where you know the file is located:
1. Click Activity.
2. Select Request Delivery.

TEX SAYS It might seem like you are requesting delivery for the box but this is part of the process for requesting a file that does not appear in TexLinx.
Request Delivery from SRC: Files not Already Entered into TexLinx

Request Items screen

In the field to the right of **Enter Number of Files (1)**, enter the number of files you want to request from this box. Then click **Enter File Info (2)**.

**Data Example:** 3

---

**Enter File Information**

After clicking **Enter File Info**, a table appears below the Alternate Fulfillment Method field (or below the Recent Request Destinations field, as it appears in this illustration). Depending upon the size of your screen you might have to scroll down the screen to see the **Enter File Information** table.

The number of rows available depends upon the value entered in the Enter Number of Files field near the top of the screen. If you find that more or fewer rows for this box are needed, repeat the steps at the top of this page. The table adds or removes the available rows.

**TEX SAYS** Changing the number of rows after you enter data in the table results in the data being cleared.
Request Delivery from SRC: Files not Already Entered into TexLinx

Enter File Information table

<table>
<thead>
<tr>
<th>Agency File Name</th>
<th>Agency Sub File Name</th>
<th>File Notes</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

There are three field columns on this table:
1. **Agency File Name** is a required field. This is the name you assign to the file. Any character can be used except for the Pipe symbol (as explained in the Boxes sections, also explained in Appendix: Definitions).
   - *Data Example*: cj010
2. **Agency Sub File Name** is an optional field for additional information assigned to the file.
   - *Data Example*: Averages
3. **File Notes** is an optional field for information on this file.
   - *Data Example*: February

Changing the Delivery Destination

Move back up the page to review delivery information.
In the above illustration, Johnny Agency is the delivery destination (1). Sometimes a person other than yourself is the delivery destination. To make this adjustment, click **Search** (2) and continue below to search for the person who is the delivery destination.

**TEX SAYS** If this dialogue box appears below the Alternate Fulfillment Method field:

*click Select if this person is the delivery destination and continue with Alternate Fulfillment Method on Page 145.*

When you clicked Search from the previous illustration, a Search portal appears. To search for the individual at your agency who is the delivery destination, enter information for that person in any of the Quick Search fields (1) and click **Search** (2).

*Data Example: Jane (in First Name) Division (in Last Name)*
Request Delivery from SRC: Files not Already Entered into TexLinx

Changing the Delivery Destination (continued)

When a list of names appears, click the button to the left of the person who should be assigned as the delivery destination for this delivery request.

**TEX SAYS** If you do not see the person you want to assign as the delivery destination, contact your agency’s Records Management Officer.

**Comments field**

Use the Comments field to provide information that will assist the delivery driver from the State Records Center.

*Data Example:* Ring bell on loading dock.

**Alternate Fulfillment Method**

There are two options here:

- **Rush:** If this is a rush delivery, select this option. This incurs an additional fee. **See Tex Says below for additional instruction.**
- **Permanent Withdrawal:** Select this if the item(s) are never to be returned to the State Records Center. Files do not incur an additional fee for this option.

For more information on Alternate Fulfillment Method, please see **Appendix: Alternate Fulfillment Method.**

**TEX SAYS** (1) Leave this field empty if this is a standard delivery. (2) When selecting RUSH delivery, call the SRC Circulation Desk (512-475-5155) after submitting this request so the State Records Center is aware of this RUSH delivery.
Request Delivery from SRC: Files not Already Entered into TexLinx

Submit the Delivery Request

Once the information appears as you want it to appear on the Request Items screen, click Request.

Request Results

This screen lists the items you have submitted for the delivery request. This process is complete. A file barcode label is generated at the State Records Center and affixed to the file so that if it is returned, it will be placed into the box from where it was pulled. Do not remove the file barcode label.

To cancel any Request, please see Appendix: Cancel a Request (Pickup or Delivery).
Request Delivery from SRC: Files not Already Entered into TexLinx

NOTES
Request Delivery from SRC: Files not Already Entered into TexLinx

NOTES
Request Delivery: from the State Records Center: Microfiche Jackets

This section shows how to request delivery for microfiche jackets (also known as a microfiche partial bundle) using the Fiche Circulation tab by way of the Microforms tab. A microfiche partial bundle is any amount of microfiche jackets less than a microfiche complete bundle.

To request delivery for microfiche complete bundles, see the section Request Delivery from the State Records Center: Boxes, Disaster Recovery, Microfilm Reels, Microfiche Bundles, and Files*.

Use Search

1. Click the Microforms item type tab.
2. Enter search terms into any of the Quick Search fields to find the microfiche bundle.
3. Click Search (continue to Search Results screen on Page 150).
   OR
4. Click Search and View.
5. Select Search (continue below).

Search Microforms screen

Enter search information into any fields (including the Infolinx System Fields on the bottom half of the screen) to find the microfiche bundle that the microfiche jackets are associated. Press Execute.
Regardless of the Search method you used from the previous page, the above illustration is the next screen. Since individual microfiche jackets are not identified on the Microforms tab, you should select the microfiche bundle where you know the microfiche jackets are located.

You are limited to work with one Microfiche Bundle at a time. If you need microfiche jackets for multiple microfiche bundles, create separate Fiche Circulations. Find the bundle that contains the microfiche jackets that you need to request delivery. Confirm the bundle is at the State Records Center (SRC). You can see \( \text{State} \) in the Current Location column (1) for items at the SRC. Click the checkbox (2) for the microfiche bundle and continue below (or click the Microforms Barcode (3) to go directly to the View screen and turn to View a Microform screen, Page 151).

TEX SAYS The grid has as many container rows as your Preferences allow. If you need to see all of the containers you have searched but they are on multiple pages (4), increase/decrease the number of containers shown:
1. click Preferences at the top of the screen in the Navigation Menu.
2. click Home Page.
3. edit the number that appears in the field for Number of records per page displayed in grid.
4. click Save.

Move to View a Microform screen

After clicking the checkbox for the microfiche bundle, click Search and View (4) and select View (5).
Request Delivery from SRC: Microfiche Jackets

View a Microform screen

(1) Scroll down the page to where you see 0000774384 is the microform barcode, 9 is the microfiche bundle number.

(2) Click Add New.

**Tex Says**: If you see the below line of information in addition to Add New, disregard the additional information. Click Add New.
Create a New Fiche Circulation screen

The top half of this screen is already completed because the information from the Microfiche Bundle populates the fields for Organization (1) and Microforms (2). The Barcode for the Microfiche Bundle (0000774384) and the Agency Reel # (9) appear in the Microforms field. The Record Series assigned to the Microfiche Bundle (3) appears below the Microforms information.

**# of Pulls**

*# of Pulls:*  

# of Pulls is a required field. It is a tool used in billing. Since this is a pull request from one Microfiche Bundle, you will always enter the number 1 into this field.

**# of Fiche Pulled**

# of Fiche Pulled:  

# of Fiche Pulled is how many Microfiche Jackets you are requesting from the Microfiche Bundle. **TEX SAYS** If you are unsure of the number of fiche, enter the number of items you list in the below Notes field.

**Notes**

Notes is where you enter the title bar information for each Microfiche Jacket you request. The number of items listed here will match the number you entered into the above field # of Fiche Pulled.
Completed: Create a New Fiche Circulation screen:

![Create a New Fiche Circulation screenshot]

**Saving**

When the fields are complete, the next step is to **Save** the information. These three options are located at the Create a New Fiche Circulation screen’s top right:

- **Save & New**: Do not select this option because you will not create more than one Fiche Circulation per bundle.
- **Save & View**: Use this if you are ready to make a Request Delivery. On the View a Fiche Circulation screen, click **Activity** and select **Request Delivery** and turn to Page 157, **Request Items screen**.
- **Save & Close**: Use this if:
  — You want to save the information you have entered for the Fiche Circulation but you are not yet ready to make a Request Delivery for the Fiche Circulation.
  or
  — You need to create another Fiche Circulation from another Microfiche Bundle.
If the above dialogue box does not appear, and you are returned to the Create a New Fiche Circulation screen, an error message appears at the top of the screen. Correct the error and click the save option you selected.

When the above screen appears, it includes the Fiche Circulation Barcode that was generated for this Fiche Circulation. The Fiche Circulation Barcode is the unique identification number applied to each item created in TexLinx. Click OK. Then, if you selected:

- **Save & View**: The Fiche Circulation has been saved in TexLink. View a Fiche Circulation is the screen to review the Fiche Circulation you just created. Continue below to use Save & View to request delivery from the State Records Center.
- **Save & Close**: The Fiche Circulation has been saved in TexLinx and the Microforms homepage appears. Continue to Find the Items to Request Delivery on the next page when you are ready to request delivery for this Fiche Circulation.

**REQUEST DELIVERY FOR MICROFICHE JACKETS**

**Use Save & View to Request Delivery**

From the View a Fiche Circulation screen, review to make sure the information is correct. If you need to make changes, click Data Manipulation and select Update then repeat the Save process. If everything is correct, click Activity (1) and select Request Delivery (2) and turn to Request Items screen, Page 157.
To find the Fiche Circulation that lists the Microfiche Jackets you need delivered from the State Records Center, there are two ways to perform a search:

A. 1. Click the Fiche Circulation item type tab you want to search.
    2. Enter search terms into any of the Quick Search fields to find the Fiche Circulation.
    3. Click Search and continue to Search Results Screen on Page 156.

OR

B. 4. Click Search and View.
    5. Select Search and continue below.

Enter search information into any fields (including the Infolinx System Fields on the bottom half of the screen) to find the item(s) that you want to request delivery. Press Execute.
Regardless of the Search method you used from the previous page, the above illustration is the next screen.

Click the checkbox(es) (1) for the Fiche Circulation item(s) you want to request delivery from the State Records Center. If there is more than one item and you want to select all of the items on this screen page, click the checkbox in the orange ribbon (2).

After you select the Fiche Circulation item, click Activity (3) and select Request Delivery (4).
1. **Page Information**: Tell you how many request pages there are. There are 10 requests per request page. All requests will be submitted together.

2. **Record Description**: The Fiche Circulation you selected on the previous screen is listed here.

3. **Delivery Destination**: This is the person who receives these Microfiche Jackets. **TEX SAYS** If the person who is to receive the Microfiche Jackets is someone other than the person listed here, see below, *Changing the Delivery Destination*.

4. **Comments**: You may enter information here to assist the State Records Center driver who is delivering your items.

5. **Alternate Fulfillment Method**: Used for rush delivery or Permanent Transfers. **TEX SAYS** For more information about *Alternate Fulfillment Method*, turn to Page 159.

**Changing the Delivery Destination**

In the above illustration, Johnny Agency is the delivery destination (1). Sometimes a person other than yourself is to be the delivery destination. To make this adjustment, click **Search (2)** and continue on the next page to search for the person who is the delivery destination. **TEX SAYS** If this dialogue box appears below the *Alternate Fulfillment Method* field:

click **Select** if the person listed is the delivery destination and continue to the third illustration on Page 158 to see the delivery location name has been changed.
When you clicked Search from the previous illustration, a Search portal appears. To search for the individual at your agency who is to be the delivery destination, enter information for that person in any of the Quick Search fields (1) and click Search (2).

**Data Example:** Jane (in First Name) Division (in Last Name)

When a list of names appears, click the button to the left of the person who is to be assigned as the delivery destination for this delivery request. **TEX SAYS** *If you do not see the person you want to assign as the delivery destination, contact your agency’s Records Management Officer.*

When Johnny Agency selected Jane Division as the delivery destination, her name replaced his name as the delivery location.

**Comments field**

Use the Comments field to provide information that will assist the delivery driver from the State Records Center. **Data Example:** Ring bell on loading dock.
Request Delivery from SRC: Microfiche Jackets

**Alternate Fulfillment Method**

![Image](image.png)

There are two options here:

- **Rush**: If this is a rush delivery, select this option. *This incurs an additional fee. See Tex Says below for additional instruction.*
- **Permanent Withdrawal**: Select this if the item(s) are never to be returned to the State Records Center. *This does not incur an additional fee for individual microfiche jackets, only when the request is for a permanent withdrawal of complete microfiche bundles.*

For more information on Alternate Fulfillment Method, please see Appendix: Alternate Fulfillment Method.

**TEX SAYS**

(1) Leave this field empty if this is a standard delivery. (2) When selecting RUSH delivery, call the SRC Circulation Desk (512-475-5155) after submitting this request so the State Records Center is aware of this RUSH delivery.

**Review the Request Items screen**

![Image](image.png)

Johnny Agency assigned Jane Division (1) as the delivery destination for the microfiche jackets. In the Comments field (2), he had a special request for the SRC delivery driver. Once the screen is complete, click Request (3).

**Request Results screen**

![Image](image.png)

This tells you the Request Delivery was successfully submitted. The person assigned as the delivery destination will receive these items. Click OK to return to the microforms homepage grid.

To cancel any Request, please see Appendix: Cancel a Request (Pickup or Delivery).
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Imaging Production
Create a work order for the State Records Center’s Imaging Department

The Imaging Production item type tab is where you complete fields to create instructions to tell the State Records Center’s Imaging Department what you want done for a finished product. This item type tab has replaced the RMD101 paper form.

1. Click the Imaging Production item type tab.
2. Click Data Manipulation in the Action Menus.
3. Select Create from the dropdown menu.
Imaging Production: Create a Work Order for the SRC’s Imaging Department

**TEX SAYS** All fields with an asterisk (*) are required fields. The page does not process without completing these required fields.

Create a new Imaging Production screen
*Imaging Production #

The Imaging Production # is an auto-generated barcode created by TexLinx that is assigned to your Imaging Production request. You cannot edit this field.

*Organization

Select the Organization within the agency associated with this Imaging Production by clicking the button on the left side of the screen or use the Quick Search fields (1) to reduce the number of options. If you do not see the organization you need, the organization does not exist in TexLinx or your permissions do not allow you to see that organization. Contact the Records Management Officer at your agency to resolve this issue.

Contact Name

Contact Name is the person the State Records Center’s Imaging Department contacts concerning this Imaging Production. Data Example: Johnny Agency

Contact Phone # (and extension)

Contact Phone # is the phone number for the person listed as the Contact Name. Data Example: 512-555-5002 x75

How these fields look when completed:
Imaging Production: Create a Work Order for the SRC’s Imaging Department

Will Created Media be Stored at SRC?

Click this checkbox if the product the State Records Center’s Imaging Department is creating for you is to be stored at the State Records Center and complete the appropriate tab for storage.

**TEX SAYS** If you click this checkbox, the Record Series field below becomes a required field.

Will Source Media be Stored at SRC?

Source Media is what you are providing as the material for this Imaging Production. Click this checkbox if the items the State Records Center’s Imaging Department is using to create an imaging product for you is to be stored at the State Records Center.

Record Series

*Record Series* is a required field only if the product the State Records Center’s Imaging Department is creating will be stored at the State Records Center (SRC) and/or if the Source Media you provide will be stored at the SRC. The Record Series Title on the agency’s Records Retention Schedule is what the imaging media is to be assigned. Select the Record Series Title by clicking the button on the left side of the screen. Initially, every Record Series available for storage appears. Use **Quick Search** fields (1) to narrow the selection of Record Series Titles and press **Search** (2). **TEX SAYS** If the Record Series you need is not listed, contact your agency’s Records Management Officer to resolve this issue.

How these fields look when completed:

**TEX SAYS**
# of Items being sent is a required field. This is the total number of containers for the source documents that you are providing to the State Records Center’s Imaging Department to create your product.

*What are you sending us to be imaged (Media Type) is a required field. This is the medium type of the source documents you are providing.  

**With the exception of Diazo, all media types are eligible for storage at the State Records Center:**

- **Diazo 16mm-2.5mil**: Diazo is a less durable microfilm used for non-archival and non-permanent information in 16 millimeter, 2.5mil.
- **Diazo 16mm-5mil**: Diazo is a less durable microfilm used for non-archival and non-permanent information in 16 millimeter, 5mil.
- **Diazo 35mm-5mil**: Diazo is a less durable microfilm used for non-archival and non-permanent information in 35 millimeter, 5mil.
- **Electronic**: Compact Disc, Portable Hard Drive, Flash Drive, or other USB Drive.
- **Hard Copy**: Paper documents (loose or bound).
- **Microfiche (Duplicate)**: Microfilm cut and inserted into microfiche jackets, duplicate version.
- **Microfiche (Original)**: Microfilm cut and inserted into microfiche jackets, duplicate version.
- **Silver 16mm-2.5mil**: More durable microfilm used for archival and permanent information in 16 millimeter, 2.5 mil.
- **Silver 16mm-5mil**: More durable microfilm used for archival and permanent information in 16 millimeter, 5mil.
- **Silver 35mm-Direct**: More durable microfilm used for archival and permanent information in 35 millimeter filmed as an identical image.
- **Silver 35mm-Print**: More durable microfilm used for archival and permanent information in 35 millimeter filmed as a negative or opposite-appearing image.

**1 mil = 0.001 of an inch.**

How these fields look when completed:
Imaging Production: Create a Work Order for the SRC’s Imaging Department

Is your Source Media already stored at SRC?

If the Source Media you are providing to the State Records Center’s Imaging Department to create your product is already in storage at the State Records Center, click this checkbox.

If Source Media is stored here, how many are we imaging?

How many containers in storage at the State Records Center is the State Records Center’s Imaging Department using to create the product you are requesting?

Data Example: 3

Agency Reel # / Box # Range and/or Barcodes

The Source Documents’ beginning and ending container numbers or the first and last barcodes.

Data Example: 10 thru 12

Inclusive Date Range

*Inclusive Date Range:__

- The Inclusive Date Range is the earliest date and the latest date for the Source Documents. The date information is entered in this format using forward slashes within the dates, with no spaces, and a hyphen to separate the dates: MM/DD/YYYY-MM/DD/YYYY

If the Beginning Date and the Ending Date are the same, you must enter the same date twice. Example: 12/31/2015-12/31/2015.

TEX SAYS Do not use a hyphen within the dates, use a hyphen only to separate the dates.

Data Example: 07/01/2010-12/31/2014 or 07/01/2010-12/31/2014 or 07/01/10-12/31/14

How these fields look when completed:

Is your Source Media already stored at SRC?:

If Source Media is stored here, how many are we imaging?:

Agency Reel # / Box # Range:

*Inclusive Date Range: 07/01/2010-12/31/2014

166
Imaging Production: Create a Work Order for the SRC’s Imaging Department

**What media are we creating?**

What you select here tells the State Records Center’s Imaging Department the medium type you want the finished product to be.

**TEX SAYS** *With the exception of Diazo, all media types are eligible to be stored at the State Records Center:*

- **CD**: Data saved to a compact disc.
- **Diazo**: Less durable microfilm used for non-archival and non-permanent information.
- **DVD**: Data saved to a digital video disc.
- **FTP Link**: Data saved to an FTP upload website.
- **Microfiche Jackets**: 16mm or 35mm microfilm cut and inserted into microfiche jackets.
- **Original**: The first generation of a reel of microfilm.
- **Other (Add to notes field)**: Explain in the notes field at the bottom of the screen.
- **Silver**: More durable microfilm used for archival and permanent information.
- **USB/Flash Drive**: Data saved to a thumb drive or any portable storage device.
Imaging Production: Create a Work Order for the SRC’s Imaging Department

What size media are we creating?

What you select here tells the State Records Center’s Imaging Department the size of the medium you want the finished product to be.

With the exception of Diazo, all media types are eligible to be stored at the State Records Center:

- CD: If selected medium above is CD.
- Diazo-Microfiche: If selected medium is Diazo, this is for microfiche.
- Diazo 16mm-2.5mil: If selected medium is Diazo, this is for 16mm-2.5mil microfilm.
- Diazo 16mm-5mil: If selected medium is Diazo, this is for 16mm-5mil microfilm.
- Diazo 35mm-5 mil: If selected medium is Diazo, this is for 35mm-5mil microfilm.
- DVD: If selected medium is DVD.
- FTP Link: If selected medium is FTP Link.
- Other (Add to notes field): Explain in notes field at the bottom of the screen.
- Silver-Microfiche: If selected medium is Silver, this is for microfiche.
- Silver 16mm-2.5mil: If selected medium is Silver, this is for 16mm-2.5mil microfilm.
- Silver 16mm-5mil: If selected medium is Silver, this is for 16mm-5mil microfilm.
- Silver 35mm-Direct: If selected medium is Silver, this is for 35mm Direct filmed as an identical image.
- Silver 35mm-Print: If selected medium is Silver, this is for 35mm Print filmed as a negative or opposite-appearing image.
- USB/Flash Drive: If selected medium is USB/Flash Drive.

Beginning File | Ending File Range

The Beginning File | Ending File Range is composed of the first and last item in the box. The Pipe symbol is used as a separator between the beginning file name and the ending file name. The Pipe symbol is created by holding down SHIFT on the keyboard and pressing the backslash key (SHIFT \).

If the Beginning File and the Ending File are the same, enter SAME as the Ending File name.

In the below example, a space appears before and after the Pipe for illustrative purposes only.

Data Example: July thru December 2010 surveys | July thru December 2014 surveys

How these fields look when completed:
Imaging Production: Create a Work Order for the SRC’s Imaging Department

**Process Only?**

Click this checkbox if you are asking the State Records Center’s Imaging Department to **Process Only** and return to you a microfilm reel and it is not to be stored at the State Records Center.

**Duplicate**

If you select **No**, move on to the next field on the form (**Addition**). If you select **Yes**, these additional fields appear:

**# of Duplicates**: How many duplicates are you wanting the State Records Center’s Imaging Department to create as the final product?

**Type of Duplicate**: What kind of duplicate are you asking the State Records Center’s Imaging Department to create as the final product?

**Addition**

**Addition**: If this is for an addition to an existing medium, select **Yes**. If this is not for an addition, select **No**. Use the **Notes** field to explain if you select **Yes**.

**Document Preparation**

**Document Preparation**: Enter information here if the Source Documents you are providing require any preparation by the State Records Center’s Imaging Department:

- Removing staples, paper clips, binder clips and other fastening materials.
- Separating documents from folders, binders, books, or notebooks.
- Trimming glue or other adhesives from documents.

**Data Example**: Staple removal and paper clip removal

**How these fields look when completed:**

<table>
<thead>
<tr>
<th>Process Only?</th>
<th>Duplicate</th>
<th>Addition</th>
<th>Document Preparation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No</td>
<td>No</td>
<td>Staple removal and paper clip removal</td>
</tr>
</tbody>
</table>
Imaging Production: Create a Work Order for the SRC’s Imaging Department

# of Reels Returned to Customer

This field is completed by the State Records Center’s Imaging Department. **Do not enter information into this field.**

**Notes**

*Notes* is a catch-all field designed to give you the opportunity to include anything that you think might not be included in the fields on this screen. This is also where you explain any **Addition** information.

**Data Example:** Box Numbers are 10, 11, and 12

Paper is legal size
Imaging Production: Create a Work Order for the SRC’s Imaging Department

Completed: Create a New Imaging Production:

Create a new Imaging Production

Fields marked with an * are required.

*Imaging Production #: 000019216

*Organization: Texas Big State Agency - 908 - Central

Contact Name: [Name]
Contact Phone #: 612-555-5002 x76

Will Created Media be stored at SRC?: [Yes/No]
Will Source Media be stored at SRC?: [Yes/No]

*Record Series:

<table>
<thead>
<tr>
<th>Organization Quick Description</th>
<th>AIN</th>
<th>RSIN</th>
<th>Record Series Title</th>
<th>Event Based</th>
<th>Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>TX Big State Agency - 996</td>
<td>6</td>
<td>A0</td>
<td>Employee Earnings Records</td>
<td>R</td>
<td>False</td>
</tr>
<tr>
<td>TX Big State Agency - 995</td>
<td>7</td>
<td>B0</td>
<td>Employee Savings Bonds</td>
<td>R</td>
<td>False</td>
</tr>
<tr>
<td>TX Big State Agency - 993</td>
<td>8</td>
<td>C0</td>
<td>Employee Deduction Authorization</td>
<td>R</td>
<td>False</td>
</tr>
</tbody>
</table>

* # of Items being Sent: [Enter number]

*What are you sending us to be imaged? (Media Type): [Select option]

Is your Source Media already stored at SRC?: [Yes/No]

If Source Media is stored here, how many are we imaging?: [Enter number]

Agency Roll #/Box # Range and/or Barcodes: [Enter information]

*Inclusive Date Range: [Enter range]

*What media are we creating?: [Select option]

*What size media are we creating?: [Select option]

Beginning File / Ending File Range:

Process Only?: [Select option]

Duplicate: [Select option]

Addition: [Select option]

Document Preparation: Staple removal and paper clip removal

# of Reels Returned to Customer: [Enter number]

Notes: Box Numbers are 10, 11, and 12. Paper is legal size.
When the fields are complete, the next step is to **Save** the information. These three options are located at the Create a New Image Production screen’s top right:

- **Save & New**: Use this to create another Imaging Production.
- **Save & View**: Use this if you have entered only one Imaging Production and you are ready to make a Request Pickup.
- **Save & Close**: Use this if:
  - You have been selecting Save & New for a set of Imaging Productions and you are ready to create a Request Pickup.
  or
  - You want to save the information you have entered for the Imaging Production(s) but you are not yet ready to create a Request Pickup.

**Creating Imaging Production dialogue box**

If the above dialogue box does not appear, and you are returned to the Create a New Imaging Production screen, an error message appears at the top of the screen. Correct the error and click the save option you selected.

When the above screen appears, it includes the Imaging Production Barcode that was generated for this Imaging Production. The Imaging Production Barcode is the unique identification number applied to each item created in TexLinx. Click **OK**. Then, if you selected:

- **Save & New**: Another Create a New Imaging Production screen appears. Some fields carried forward from the previous box created but all fields are editable.
- **Save & View**: View an Imaging Production is the screen for you to review the Imaging Production you just created and is saved in TexLinx. Continue to the last item on Page 174 (**View an Imaging Production**) to create the request for the State Records Center to pickup the Imaging Production if you are ready to initiate the request.
- **Save & Close**: The Imaging Production has been saved in TexLinx and the Imaging Production homepage appears. Save & Close is used when you are not yet ready to create a request for the State Records Center to process the Imaging Production request. When you are ready to initiate the request, continue to the next page to find the Imaging Production in TexLinx that begins the process to create a request for the State Records Center.
Use Search to find your Imaging Production

1. Click the item type tab for Imaging Production.
2. Enter search terms into any of the Quick Search fields to find the box or boxes.
3. Click Search (continue to Imaging Production Search Results, Page 174).
   OR
4. Click Search and View.
5. Select Search (continue below).

Search Imaging Production screen

Enter search information into any fields (including the Infolinx System Fields on the bottom half of the screen) to find the Imaging Production that you want to create a request. Press Execute.
Imaging Production: Create a Work Order for the SRC’s Imaging Department

Imaging Production Search Results

Regardless of the search method used on the previous page, this is the next screen you see. Click the checkbox for the Imaging Production request you want to send to the State Records Center’s Imaging Department.

Initiate the Imaging Production Request

After clicking the checkbox for the Imaging Production:
1. Click Activity.
2. Select Request Pickup and go to Request Items to be Picked Up screen on the next page.

View an Imaging Production screen (if you selected Save & View from page 172)

To send the Imaging Production to the State Records Center’s Imaging Department, you must:
1. Click Activity.
2. Select Request Pickup and go to Request Items to be Picked Up screen on the next page.
Request Items to be Picked Up screen

The areas on this screen:
1. **Record Description**: The Imaging Production Barcode and the Organization you assigned to this Imaging Production.
2. **Current Location**: Your name is listed as the person who created this Imaging Production.
3. **Home Location**: Imaging Production.
4. **Destination**: Imaging Production.
5. **Search**: Not used for this task.
6. **Comments**: Not used for this task.

Request Results screen

Confirmation that your Imaging Production request has been submitted to the State Records Center’s Imaging Department. Click **OK**.

To cancel any Request, please see Appendix: Cancel a Request (Pickup or Delivery).
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Appendix:
Definitions

**# of Fiche Pulled:** The number of items you are requesting on a Fiche Circulation.

**# of Pulls:** This is a field used for billing in Fiche Circulation. The data entered into this field will always be 1.

**Action Menus:** The dropdown menus on each Homepage Grid. The Action Menus are: Activity, Search and View, Data Manipulation, Data Removal, and Cart.

**Activity:** The dropdown Action Menu used for moving things around the TexLinx system.

**Addition:** The process to add more information to an existing reel of film. Additions are not completed for microfiche in the State Records Center’s Imaging Department.

**Alternate Fulfillment Method:** When requesting delivery, the Alternate Fulfillment Method is a dropdown menu to designate a delivery as a Rush or as a Permanent Withdrawal.

**Asterisk:** This is used to identify a required field. If this field is not completed, the information entered into other fields cannot process.

**Barcode:** The unique identification number assigned to everything created in TexLinx.

**Boxes item type tab:** The item type tab used for everything associated with boxes in TexLinx.

**Bulk Update:** This is used to update the same information to a selected group of items. Only the fields completed bulk update.

**Bundle:** A small collection of microfiche jackets using the same Record Series Title that have been manually separated from a large amount of microfiche jackets. Each bundle is created as its own container in TexLinx. A good rule of thumb when creating a bundle is to keep the number of microfiche jackets at 200 or less. Each bundle is assigned a Reel Number by the agency entering the information into TexLinx.

**Carry Forward:** This is when some fields completed during Create are brought forward to a new data entry screen.

**Cart:** A place in TexLinx to gather items for an individual Item Type tab that you want to use at a later time.

**Create:** This appears in the Data Manipulation dropdown Action Menu. Create is used when creating new information in TexLinx.

**Creating Dialogue Box:** This dialogue box appears when any item is created in TexLinx. The information in this box begins with a progress bar and the resulting information explains how many items were created and if a single item is created, the Barcode for that item appears.

**Dashboard:** A pop-up screen that shows items checked out to a user as well as a user’s open requests that have not been completed, yet. Preferences can also be found here in addition to the Preferences option in the Navigation Menu.

**Data Manipulation:** The dropdown Action Menu used for creating and editing information. Search and replace is also performed here.

**Data Sheet:** This appears only on the Boxes and Microforms item type tabs. It appears under the Data Manipulation dropdown Action Menu. The Data Sheet is used to create a set of boxes or microforms for one Records Series at a time.

**Data Removal:** An Action Menu used to delete an item from view in TexLinx.

**Delete:** Selecting an item on the homepage grid and choosing this option under the Data Removal
APPENDIX: Definitions

Action Menu will delete an item from view. This does not remove the item from TexLinx, it just moves it to Deleted status and most users will not see this item anymore.  

**Disaster Recovery item type tab:** The item type tab used to create Disaster Recovery containers for the Disaster Recovery Vault at the State Records Center. This tab is also used to request delivery for items designed with Will Call return.

**Drive Date:** The Drive Date is used in conjunction with Event Based, Total Retention, and the Event Trigger to calculate the Eligible Destruction Date. This field auto-completes when left blank for Total Retention values that use only years and or months and do not have an Event Based acronym. This field also auto-completes when FE (fiscal year end) and CE (calendar year end) are used as the Event Based acronym.

**Duplicate:** An identical reproduction of an existing reel of microfilm or a jacket of microfiche.

**Event Based:** Event based is a series of acronyms used as part of the Total Retention. The acronyms are: AC, after close; AV, administratively valuable; CE, calendar year end; FE, fiscal year end; LA, life of asset; PM, permanent; PS, purpose served; US, until superseded

**Event Trigger:** This field explains what the Event Based acronym means.

**Export:** The process of moving a selected set of information from TexLinx to a text-based source.

**Fiche Circulation:** The item type tab used to request delivery and request pickup for individual Microfiche Jackets.

**Files item type tab:** The item type tab used for files.

**History:** Found under the Activity Menu for Search and View, History is a roadmap that details each time an action was performed upon the item from when it was created up to the last time the item was updated or a request was completed.

**Homepage Grid:** This shows the inventory that exists in TexLinx for items assigned to that item type tab.

**Imaging Production item type tab:** The item type tab used to create a work order for the Imaging Department at the State Records Center.

**Infolinx:** The software designer for TexLinx.

**Infolinx System Fields:** Fields on the lower half of the View screen used to identify the history for that item.

**ISNOTNULL:** Means Is Not Null. It is used for Search to find items where the field is not empty.

**ISNULL:** Means Is Null. It is used in Search to find items where the field is empty.

**Item Type Tabs:** The tabs near the top of the screen that are assigned to you based upon the permissions assigned to you by your agency’s Records Management Officer or Records Management Liaison.

**Jacket:** A single sheet of microfiche containing many images of microfilm sliced and inserted into microfiche jackets. Often times a jacket or a group of jackets are inserted into a paper folder as a safeguard to protect the information in the jacket. A small collection of jackets are known as a bundle.

**Key Word Search:** A Search function in each Item Type Tab that allows the user to select a field and enter a key word or phrase into a text field to search a specific tab for that information in that field.
APPENDIX: Definitions

Logout: Logout is found at right side of the Navigation Menu. To avoid Time Out, each user should Logout at the end of each session or when they know they are leaving the screen idle for an extended period of time.

Microfiche: A single sheet of microfiche containing many images of microfilm sliced and inserted into microfiche jackets. Often times a jacket or a group of jackets are inserted into a paper folder as a safeguard to protect the information in the jacket. A small collection of jackets are known as a bundle.

Microforms: In TexLinx, microforms is the umbrella term for microfilm and microfiche. It is also the reference source in Fiche Circulation to identify the Microfiche Bundle from where Microfiche Jackets were pulled in the State Records Center.

Microforms item type tab: This is the item type tab for microfilm and microfiche.

Mil: This is a unit of measurement for microfilm thickness. 1 Mil = 0.001 (1/1,000th) of an inch.

Navigation Menu: The areas at the very top of TexLinx screen.

Organization: The base Organization is the state agency. Organization is also expanded to include Division, Business Unit, and Business Sub-Unit.

Override: This is a clickable checkbox used on the Create screen to override the Drive Date created when it is auto-calculated in TexLinx. The Drive Date is auto-calculated when there is only a number of years and/or months used as the Total Retention or when CE or FE is used as an Event based acronym. Override does not need to be clicked when the Event Based acronyms AC, LA, PM, PS, are US are used.

Permanent Withdrawal: A delivery option for Alternate Fulfillment Method when requesting delivery. Permanent Withdrawal (also known as Permanent Transfer) is selected when an item is being delivered from the State Records Center and will not be returned. Selecting this option may incur an additional fee. The only instances when the fee is waived is for: individual files from a box, microfiche jackets that are part of but not the complete bundle of microfiche; and all Disaster Recovery boxes.

Permissions: Rights assigned to a Role to all users in TexLinx.

Pipe Symbol: A vertical line used as a separator between the beginning file and ending file information in the Beginning File | Ending File Range in the Create, Update, and Data Sheet screens for Boxes and Microforms. The Pipe Symbol is created by holding down SHIFT on the keyboard and pressing the \ key. The Pipe Symbol generated is a vertical line that looks like this: | Do not used the Pipe symbol for any TexLinx field other than Beginning File | Ending File Range.

Preferences: Depending upon the permissions a user has been granted by the agency’s Records Management Officer or Records Management Liaison, there may be many options here. But everyone who can see information in TexLinx can go here to adjust how many items that are viewable in any homepage grid. This is done by clicking the Home Page icon and completing the field for “Number of records per page displayed in grid”.

Query: Fields use equations to generate a search for a specific tab.

Quick Search: Search boxes arranged horizontally, usually found between the item type tabs and the Action Menu dropdown menus.

Records Management Liaison: The individual assigned by an agency’s Records Management Officer or the agency head to act as an assistant to the Records Management Officer.

Records Management Officer: The individual assigned by an agency head to be the person
APPENDIX: Definitions

responsible for all records management responsibilities at his or her agency.

**Request Delivery**: This is used to request delivery from the State Records Center.

**Request Pickup**: This is used to request pickup from an agency.

**Rights**: Each Role has a list of security items (rights) that allow a user assigned to that Role to perform in TexLinx.

**Role**: The assignment given to a user by the agency’s Records Management Officer or Records Management Liaison that determines what the individual sees and does in TexLinx.

**Rush**: A delivery option for Alternate Fulfillment Method when requesting delivery. Rush is selected when an item needs to be delivered from the State Records Center immediately or prior to the next regularly scheduled delivery within the next business day. Selecting this option for any number of items incurs an additional fee.

**Save & Close**: This is used in the Create and Data Sheet screens when creating one item and the user is not ready to submit a Request Pickup or it is used after a user has created a series of items in TexLinx.

**Save & New**: This is used after a user has created an item and wants to create another item. Some fields may carry forward.

**Save & View**: This is used after creating a single item to review the information entered and to Request Pickup.

**Search & Replace**: An edit option found under the Data Manipulation Action Menu. This allows a user to search a selected amount of items and replace an exact term or phrase with another term or phrase for all of the items found.

**Time Out**: When a user is logged into TexLinx and leaves the screen idle for an extended period of time, time out occurs once the 20-minute timer at the top of the screen reaches zero. Time Out holds the user’s position for 24 hours. There are a limited number of positions available in TexLinx so it is recommended all users Log Out when finished for each session.

**Transfer**: This is used from the Activity dropdown Action Menu to place a file or a group of files into a box that is not at the State Records Center.

**Tex Says**: Helpful tips in the Instruction Guide to give more information than was provided in a previous instruction.

**TexLinx**: The software used by the Texas State Library to help state agency users access their storage inventories at the State Records Center, see and update their Records Retention Schedules, request deliveries from and pickup items to be sent to the SRC, and to register for training classes.

**TexLinx Resources**: This is found at the top of each TexLinx page. Click here to go to the area of TexLinx where training materials are found as well as other TexLinx-related items.

**Update**: This is used from the Data Manipulation dropdown Action menu to correct or adjust information for an item that appears in TexLinx.

**View**: Found under the Search and View Action Menu. This allows a user to view data for an item in TexLinx.

**Wild Card**: This is the percent % symbol. It is used in any search or Quick Search field to find items with information in that field when the user does not have a specific search term to use. This oftentimes generate many results so it is suggested this search option be used sparingly.

**Will Call return**: Select this from the Return Type dropdown menu when creating an item in Disaster Recovery.
Appendix: Search

To search, use the Quick Search fields at the top of each item type tab screen or activate the Search option under the Search and View action button.

Unless instructed otherwise, do not use spaces when using search symbols.

**Using the Wild Card % key to search:**
If you do not have specific information to perform a search, enter the percent sign % into any field. % is used as the Wild Card in TexLinx. The search results generate for any items that have information in that field. This may result in a large number of findings so use this search option sparingly unless you want a large amount of information. It is a good search option for viewing an entire inventory for an item type tab.

---

**To search for a single item:**
Type the information into any number of Quick Search field in the top section of an item type tab (Boxes, Files, Disaster Recovery, Microforms, etc.) or into any fields in the Search screen found in the Search and View dropdown menu.

---

**To search for a series of items:**
> is used to search for items greater than the search item.
**Example:** >500 would search for items greater than 500

< is used to search for items less than the search item.
**Example:** <500 would search for items less than 500.

>= is used to search for items matching and greater than the search item.
**Example:** >=500 would search for 500 and items greater than 500.

<= is used to search for items matching and less than the search item.
**Example:** <=500 would search for 500 and items less than 500.

<> is used to search for a range.
**Example:** To find all containers numbered 500-775, enter: >=500<=775

---

**To search for a non-consecutive set of items:**
Use OR between the terms with a space on each side of OR.
**Example:** to search for container numbers 600, 603, 611, and 815; enter: 600 OR 603 OR 611 OR 815

---

**TEX Says** Since the Box# and Reel# fields are designed as text fields and not numeric fields, searching for a specific container number or a range of container numbers may not yield desired results.
APPENDIX: Search

Using Query from the Search and View action button
This is a more complex search tool. Disregard the checkbox on the left side of the screen. Column is used to identify the field you want to perform the search. Operator is the action to be used. Criteria: search information is entered here.

Logic:
Using OR: Field1 = A or B – records where Field1 = A or Field1 = B would be returned
Using AND: Field1 = A and Field2 = B – records where Field1 = A and Field2 = B would be returned – both fields would have to match

Sort Type:
Ascending means the lowest search result appears at the top of the grid
Descending means the highest search result appears at the top of the grid
Disregard the fields Sort Order and Receive Scan

<table>
<thead>
<tr>
<th>Operator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>=</td>
<td>EXACT</td>
</tr>
<tr>
<td>Between</td>
<td>RANGE</td>
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<td>&gt;</td>
<td>GREATER THAN</td>
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<td>&lt;</td>
<td>LESS THAN</td>
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<tr>
<td>&gt;=</td>
<td>GREATER THAN OR EQUAL</td>
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<tr>
<td>&lt;=</td>
<td>LESS THAN OR EQUAL</td>
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<tr>
<td>&gt;&gt;</td>
<td>GREATER THAN AND LESS THAN</td>
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<tr>
<td>In</td>
<td>List with comma</td>
</tr>
<tr>
<td>NotIn</td>
<td>Omit: List with comma</td>
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<tr>
<td>IsNotNull</td>
<td>Field with information</td>
</tr>
<tr>
<td>IsNull</td>
<td>Field with no information</td>
</tr>
<tr>
<td>Like</td>
<td>CONTAINS</td>
</tr>
<tr>
<td>NotLike</td>
<td>DOES NOT CONTAIN</td>
</tr>
</tbody>
</table>
Appendix: Preferences

Depending upon the Permissions allowed in your Role, there may be many things you can do here or a very limited number of options.

The one thing all users can do here is to access the Home Page. (This is also found in the Dashboard (see Appendix: Dashboard).

The Home Page is where users go to adjust the amounts of rows of information appear on the homepage grid. To adjust the number of homepage grid rows:
1. Click Preferences at the top of the screen in the Navigation Menu
2. Click Home Page.

Edit the number the appears in the field for Number of records per page displayed in grid (3) and click Save (4). The number you enter will be the number of rows you will see on the homepage grid for each tab.
<table>
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Appendix:
Alternate Fulfillment Method

Alternate Fulfillment Method (1) is an available option when completing a Request Delivery in TexLinx. Unless a Rush delivery or a Permanent Withdrawal is needed, you will not activate this field. This is found on the Request Items screen. Click the dropdown menu (2) to make a selection:

- **Rush**: A delivery option for Alternate Fulfillment Method when requesting delivery. Rush is selected when an item needs to be delivered from the State Records Center immediately or prior to the next regularly scheduled delivery within the next business day. Depending upon the number of items requested for Rush delivery, the deadline is 3:30 p.m. Selecting this option for any number of items incurs a Rush fee. When selecting RUSH, please call the SRC Circulation Desk (512-475-5155) to alert the State Records Center about this RUSH delivery and to confirm delivery for that same day.

- **Permanent Withdrawal**: A delivery option for Alternate Fulfillment Method when requesting delivery. Permanent Withdrawal (also known as Permanent Transfer) is selected when an item is being delivered from the State Records Center and will not be returned. Selecting this option may* incur a Permanent Withdrawal fee.

*The Permanent Withdrawal fee is waived for:
- Individual files delivered from a box at the State Records Center.
- Microfiche Jackets that amount to part of, not all of, a microfiche bundle.
- Disaster Recovery boxes.
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Appendix:
Calculate the Drive Date

The Drive Date is a required field on the Create and Data Sheet screens in the Item Type tabs for Boxes and Microforms. It is used, in conjunction with Event Based (1) (when applicable) and Total Retention (2) (years, months, and or days) for the Record Series selected to calculate the Eligible Destruction Date is calculated.

The following page is a guide to help you determine the Drive Date for items created in TexLinx.
APPENDIX: Calculate the Drive Date

Calculate the Drive Date

The Drive Date is used to help calculate the Eligible Destruction Date of records sent to the Texas State Library for Storage at the State Records Center. A Drive Date is required to calculate the Eligible Destruction Date.

\[
\text{Drive Date} + \text{Total Retention} = \text{Eligible Destruction Date}
\]

or

\[
\text{Eligible Destruction Date} - \text{Total Retention} = \text{Drive Date}
\]

If the Total Retention contains… The Drive Date is…

AC………… The Close Date* for the records. Any date between the Final Inclusive Date and the day the Request Pickup is being submitted.

FE………… August 31 of the Fiscal Year of the Final Inclusive Date.
(Fiscal Year = Sept. 1 to Aug. 31)
Example: Final Inclusive Date: 10/15/2014, Drive Date is 08/31/2015

FFE……… September 30 of the Federal Fiscal Year of the Final Inclusive Date.
(Federal Fiscal Year = Oct. 1 - Sept. 30)
Example: Final Inclusive Date: 12/15/2014, Drive Date is 09/30/2015

LA……….. When the Life of Asset for the record has expired. Any Close Date* between the Final Inclusive Date and the day the Request Pickup is being submitted.

US……….. When the record has been superseded. Any Close Date* between the Final Inclusive Date and the day the Request Pickup is being submitted.

PS……….. When the record has fulfilled its Purpose Served. Any Close Date* between the Final Inclusive Date and the day the Request Pickup is being submitted.

AV……….. When the record is no longer administratively valuable. Any Close Date* between the Final Inclusive Date and the day the Request Pickup is being submitted.

Years and/or Months Only……….. Any Close Date* between the Final Inclusive Date and the day the Request Pickup is being submitted.

PM……….. Any Close Date* between the Final Inclusive Date and the day the Request Pickup is being submitted. There is no disposal date for Permanent records but a Retention Drive Date is required in case the Retention amounts are changed in the future.

*Close Date is the date when records are no longer active. The agency user determines this date.
Appendix:
Cancel a Request (Pickup or Delivery)

In any tab, information

Permissions for this process have been disabled. Call 512-475-5155 to cancel any request.
Permissions for this process have been disabled. Call 512-475-5155 to cancel any request.
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Appendix: Dashboard

Dashboard is a TexLinx interface where a user can see items in the user’s possession, open requests, and preferences. Preferences and Requests from the Navigation Menu are consolidated into this area.

Click Dashboard in the Navigation menu at the top of the screen.

A pop-up screen opens with three side tabs:

- **Items**
- **Requests**
- **Preferences**

The active side tab appears as dark gray with a white arrow indicating the information showing on the screen is for that side tab. Inactive side tabs appear as light gray.

The symbols used in **Items** and **Requests** identify the type of item:

- Boxes
- Files
- Disaster Recovery
- Microforms (Microfilm / Microfiche)
- Fiche Circulation
- Imaging Production
The first side tab **Items** opens to **Items in my Possession**. These items have been delivered to you or have been created by you in TexLinx and not yet received into the State Records Center. Anything with your name in **Current Location** anywhere in TexLinx appears here. The number that appears on the tab tells how many items are assigned to you in TexLinx.

Click the blue hyperlink to open the View screen for the item’s tab. You do not see deleted or Permanently Returned items but they calculate into the number of items assigned to you.

**My Requests screen**

Click **Requests** side tab to open **My Requests**. This shows all open requests you have submitted thru TexLinx. Once a Request is completed at the State Records Center, the request will disappear from this screen. The number that appears on the Requests side tab tells you how many open requests you have in TexLinx.

Click the blue hyperlink to open the View screen for the tab where that item appears.
The only information you will want to edit on this screen is the field **Number of records per page displayed in grid**. Edit this field to change the number of rows of information that appear in the homepage grid for every tab you use in TexLinx. After you change the value, click **Save** at the top of the screen.

**TEX SAYS** Changing any other data fields (**Default Current Location**, **Default Home Location**, **Default Request Destination**) on this screen could result in delivery / pickup problems. So, as a rule, please do not change any information on this screen other than the field **Number of records per page displayed in grid**.
Appendix: Change Your Password

TexLinx requires users to change the password on a regular schedule. However, if you need to change your password prior to being prompted to change it, click Admin in the Navigation Menu at the top of the screen. Administration is used for many technical elements in TexLinx but your permissions will limit what you can do on the Admin page.

Click Change Password to begin the process.

Password requirements are:
- Between 8 and 32 characters
- At least one number
- At least one upper case letter
- At least one lower case letter
- Symbols are optional
1. Enter your Current Password
2. Enter your New Password
3. Confirm New Password
4. Click Save.
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Appendix: Timer

At the top of each TexLinx screen is a timer (1) to remind you how much time is left in your current session before you are timed out.

Timeout Warning

A reminder pop-up window appears when there is time remaining of 3 minutes, 2 minutes, and 1 minute in the current session before you are automatically timed out. The “current time” (2) mentioned in the warning is the time when the warning was posted.

Reset the Timer

Just because the current session is 20 minutes, it does not mean what you are doing has to be finished in 20 minutes. There are a number of ways for you to reset the time:

Click a radio button (3) (like those found in the Organization section when creating an item).

Select an item in the Navigation Menu (4), the Item Type tabs (5), or one of the dropdown menu options (6) in the Actions Menus all of which moves you to another screen.

TEX SAYS The best option to reset the timer is to click a radio button because you can click back to the original selection and you will not leave the screen where you are currently working.
Appendix: Export

The process to export items from TexLinx to a spreadsheet program begins with a search.

Use Search

1. Click the item type tab from where you want to export information. This is where you will first perform a **Search** (in this example, the Boxes tab is being used).
2. Enter search terms into any of the **Quick Search** fields to find the box or boxes.
3. Click **Search**. (continue on Page 208, Search Results screen).
   OR
4. Click **Search and View**.
5. Select **Search** (continue below).

Search Boxes screen

Enter search information into any fields (including the **Infolinx System Fields** on the bottom half of the screen) to find the item(s) that you want to export information. This search (1) is for all boxes for the Record Series Title “Employee Earnings Records”. Press **Execute** (2).
Regardless of the search method used from the previous page, the above screen is your next destination.

Click the checkbox (1) for the containers you want to export information. You can see from the **Current Location** column (2) which boxes are currently with you or someone at your agency. If you see 🚨 (3) in the Current Location column, that indicates the box is at the State Records Center.

Click the checkbox (4) on the orange ribbon if you want to select all* of the containers.

* **TEX SAYS** The grid has as many container rows as your Preferences allow. If you need to see or request all of the containers you have searched but they are on multiple pages (5), increase/decrease the number of containers shown:

1. click Preferences at the top of the screen in the Navigation Menu.
2. click Home Page.
3. edit the number that appears in the field for **Number of records per page displayed in grid**.
4. click Save.

**Export**

After clicking the appropriate checkbox(es) for the item(s) you want to export:

1. Click Activity.
2. Select Export.
1. **Enter Field Delimiter**: This is what will separate the fields when the results are opened in Notepad. The Pipe symbol is the default setting. Please keep that setting.

2. **Available Box Fields**: These are the fields that are on the tab where you are performing the export. Any tab you double click in this column will be moved to the Box Fields to Export on the right.

3. **Box Fields to Export**: These are the fields you selected from Available Box Fields. The order the fields appear in this column, top to bottom, is the order these fields will appear in Notepad. To change the order, click once on the Field Name and click the Up arrow or the Down arrow on the right. Click Clear at the bottom to erase your selections and start over.

4. **Location Info**: Choosing Barcode or Quick Description will determine how the information appears for Current Location, Home Location, and/or Hub Location if any of those fields are selected by you.

5. **Saved Export Profiles**: If you want to share the current field choices (which makeup an Export Profile) or if you want to use a saved Export Profile, click the + sign. The fields will autopopulate.

6. **Export Selected**: After you complete the column for Box Fields to Export, the amount of checkboxes you clicked on the Homepage Grid appears here. And will export if you click Export Selected.

7. **Export Query**: After you complete the column for Box Fields to Export, the total number of results from the search you did appears here. If you click Export Query, all of the items from the search you did will export, not just those that you clicked a checkbox.
After you click either Export Selected or Export Query, the View File will change from gray (which was unclickable) to orange. If you are ready to view your export information, Click **View File**.

**Open the Export File**

Depending upon your computer browser’s settings, one of three things will happen:
1. The export file will open on its own in Notepad or another text editor.
2. A pop-up like the one above will appear (1). Click **Open**.
3. Nothing will appear to happen. Contact your IT department (or other computer assistance person at your agency) to adjust your computer’s pop-up setting or use another web browser.
This is the window that appears after you click Open from the pop-up or that automatically opened when you clicked View File.

**TEX SAYS** TexLinx is still open. You might want to return to TexLinx at this point and Logout before you get timed out.

**Select and Copy**

Select all of the text by holding down CTRL and pressing A. (Or right click the mouse and choose Select All from the menu.)

With the text highlighted, copy the text my holding down CTRL and pressing C. (Or right click the mouse and choose Copy from the menu.)

**Spreadsheet**

**Open Excel**

Open a blank Excel (or other spreadsheet program) screen. Click once on the first cell (identified in this image as call A1 since it is in column A, row 1).
APPENDIX: Export

**Paste Information**

With the first cell on the spreadsheet selected, right click on your mouse and select Paste.

The information from the Notepad will paste onto the spreadsheet.

**Convert Text to Columns**

Click the A column header (1) and the entire row will be selected (2). This is needed to convert the text to columns.
APPENDIX: Export

Convert Text to Columns: Data tab

With the A column selected, click once on the **Data** tab at the top of the screen.

When **Data** was clicked, a new set of menu options appears. Click once on **Text to Columns**.
APPENDIX: Export

Convert Text to Columns Wizard: Step One

The first step is the easiest: Make sure Delimited is selected (1) and click Next (2).

Convert Text to Columns Wizard: Step Two

The area you need to adjust in this step is Delimiters. The only checkbox that should be selected here is Other: (1). If anything else is selected (Tab, in this case (2)), deselect it. In the field next to Other: (3), type the Pipe symbol. Use SHIFT \ to create |
Convert Text to Columns Wizard: Step Two (continued)

When you click the checkbox for Other and enter the Pipe symbol in the Other: field, the Data Preview section (1) converts the information to columns. You see all of the rows of information you have. This is just a sample of your data. Once your screen looks similar to the above screen, click Next (2).

Convert Text to Columns Wizard: Step Three

What you select in Column data format (3) affects the information for each column in Data Preview (4). When you first arrive at this screen, the first column is already selected (the black box with white text is an indication that area is selected).

The first thing to do is select all of the columns in the Data preview section. With the first column selected, use the scroll bar (5) to move to the final column. When you arrive at the final column, hold the SHIFT key and click once in the last column. All columns will be selected (6). Move the scroll bar back to the left to make sure all columns are selected.

Now, go back up to the Column data format section, click once on Text (7).
You will see the information header for each column changes from General to Text (1). Once this is done, click Finish (2). You will be returned to the Excel spreadsheet.

**Return to the Spreadsheet**

Your information is now split into columns. The fields you chose in TexLinx are now the column headers. Use the column guides at the top of each row (the vertical lines between the letters) to move each column to see all of the data so you can see all of the data for each column.

**The Finished Spreadsheet**

Once you are finished with your spreadsheet, be sure to save it to your computer or an external storage device if you might need it for future reference.