Guide to Update TexLinx Items for Obsolete AIN/Record Series Titles

(NOTE: The images used in this guide contain created information for the non-existent Texas Big State Agency.)

When a state agency's Records Retention Schedule is recertified and then updated in TexLinx by a Texas State Library Government Information Analyst, data for everything except those items (boxes and microforms [microfilm and microfiche]) assigned to an obsolete Agency Item Number (AIN) are automatically updated. However, when a new AIN ((Approval Status designated as Approved in TexLinx) is used to replace an obsolete AIN (Approval Status designated as Obsolete in TexLinx), the agency's Records Management Officer is responsible for updating boxes and microforms items assigned to the obsolete AIN. The Obsolete Series Report is sent by the TSL Government Information Analyst as an attachment in the email notifying the agency’s Records Management Officer that the Retention Schedule has been recertified.

The RMO’s first step toward updating items assigned to an obsolete AIN is to create an AIN / Record Series Title list during a review of items in the Boxes tab and the Microforms tab in TexLinx. This instruction guide provides the steps for the Boxes tab, but the same steps are used for the Microforms tab. So, please be sure to check both tabs. And be sure to use Internet Explorer or Firefox, no other web browser is fully compatible.

REVIEW IN TEXLINX TO GENERATE AIN / RECORD SERIES TITLE LIST FOR TEXLINX ITEMS

Log into TexLinx and click the Boxes tab:
The % is the wildcard key in TexLinx. Use % in any search field to yield results for anything in TexLinx with data in that field. In the Box Barcode quick search field, type % and click the Search button (or Enter on your keyboard):

This search yields **131 items** on the Boxes tab:
The next step is to Export. Do not click on any of the checkboxes to the left of the Box Barcode numbers. Click the Activity dropdown menu and select Export:
The number for the search result appears in the data field for **Export Query**. In the **Available Box Fields** list, double click **Record Series** (make sure **Record Series Title** is not selected). Record Series contains both the AIN and the Record Series Title that are needed:
As items are selected from the Available Box Fields list, they populate in **Box Fields to Export**. If a selection error made, click the item in the Box Fields to Export column and click the left arrow to remove it or click **Clear** at the bottom of the column to remove all selections. The up/down arrows are used to sort, that is not needed for this task. Next, click the orange **Export Query** button:

The screen will reset (flash for a brief moment); click the orange **View File** button:
When the View File button is clicked, you will probably get a dialogue box like this in Firefox (select Notepad to open the file) and click **OK**:

![Firefox dialogue box](image1)

Or a message similar to this is show in Internet Explorer; click **Open**:

![Internet Explorer dialogue box](image2)

The file will open similar to this. Everything needs to be selected and copied. With the cursor blinking at the top left of the screen, **hold down CTRL and press A** (or mouse right click, **Select All**). This selects everything. With all of the data selected, **hold down CTRL and press C** (or mouse right click, **Copy**). This copies all of the selected information:

![File contents](image3)
USE EXCEL SPREADSHEET TO PREPARE THE DATA

Open Excel.

With the first cell selected **hold down CTRL and press V** (or mouse right click on the cell and select **Paste**):
This will paste the copied information:

Click 1 to the left of **Record Series** to select that line of information:
Next, mouse right click and select **Delete** to remove that line of information (do not click the Delete button on the keyboard):

Then, sort the items. Mouse right click anywhere in column of text, click once on **Sort**, then select **Sort A to Z**. The items will sort in order according to the AIN:
Each Record Series needs to be listed once; time to remove the duplicates. With the first cell selected, click **Data** at the top of the screen:

![Excel interface showing Data ribbon and Remove Duplicates dialog]

Click **Remove Duplicates**:

![Excel interface with Remove Duplicates dialog open]

The **Remove Duplicates** dialogue box appears. Leave the checkbox selected and click **OK**:
A Microsoft Excel dialogue box giving information about the data. Click OK:

The remaining Record Series items appear once:

Save and or print this spreadsheet to help compare this with the information on the Obsolete Series Report (see the next section for that process). Repeat this process beginning on Page One for the Microforms tab if the agency has Microforms items in TexLinx. Keep the Boxes and Microforms lists separate to keep the process more simplified since you will update each tab separately.
COMPARE THE EXCEL SPREADSHEET DATA WITH THE OBSOLETE SERIES REPORT

Mark in some way those items on the Obsolete Series Report that also appear on the Excel spreadsheet. The Excel spreadsheet on the left is the spreadsheet generated following the above steps to show all AIN/Record Series Titles with items in TexLinx. The information on the right is the Obsolete Series Report (for Texas Big State Agency) with one item highlighted (by the RMO) to identify it is the only item on the list that appears on the Excel spreadsheet on the left. Highlighting it shows there are boxes or microfoms in TexLinx that needs to be updated.

<table>
<thead>
<tr>
<th>AIN</th>
<th>Record Series Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>08</td>
<td>Employee Deduction Authorizations</td>
</tr>
<tr>
<td>12</td>
<td>A Files</td>
</tr>
<tr>
<td>15</td>
<td>Inventory, Annual</td>
</tr>
<tr>
<td>16</td>
<td>Complaint Investigations</td>
</tr>
<tr>
<td>25</td>
<td>Maintenance/Service Contracts</td>
</tr>
<tr>
<td>26</td>
<td>Payroll Projections</td>
</tr>
<tr>
<td>28</td>
<td>Restitution Records and Reports</td>
</tr>
</tbody>
</table>

Determine which AIN/Record Series on the recertified Retention Schedule (or Amendment) is replacing the obsolete one. This must be known to update information for items in TexLinx.
UPDATE BOXES AND / OR MICROFORMS IN TEXLINX

Once the comparison (between the Obsolete Series Report and the Excel spreadsheet) is complete, it is time to update the AIN/Records Series Titles for those items.

Log into TexLinx.

Click the Record Series tab near the top of the screen:

In the AIN quick search field, type the AIN you marked on the Excel spreadsheet and click Search:

Keep in mind a search for 25, might yield results for anything with 25 in the AIN (25, 250, 125, 3256, etc.) so be aware of the specific AIN you are looking for in the Home Page grid search results:
Click the **checkbox** for the obolete AIN/Record Series Title that has items in TexLinx:

Then click the **Search and View** dropdown menu and select **View**:

On the **View a Record Series** screen, scroll down to the **Boxes for this Record Series** section and the **Microforms for this Record Series** section:
Not every Record Series will have items assigned to both Boxes and Microforms but some do. Be sure to update both, that process is completed separately. This is the instruction for Boxes.

Click the hyperlink for **Query Boxes on Home Page**:

The **Boxes** tab will open a Home Page Grid all of the boxes for the obsolete AIN/Record Series Titles. Note the number of search results:

Click **Data Manipulation** and select **Bulk Update**:
At the top of the **Bulk Update Boxes** screen, an information box has two radio buttons that tell how many items are going to be updated. If no checkboxes were checked on the Boxes Home Page grid, the default radio button is the one for updating all of the boxes found when the Boxes Home Page grid was populated from the Record Series tab. If any checkboxes were selected on the Boxes Home Page grid, that radio button will be selected. In this case, since no checkboxes were selected on the Boxes Home Page grid, the radio button updating all of the items is selected. The user’s email is listed because Bulk Update can sometimes take a few minutes and is not immediately reflected in the Home Page grid. An email will be sent to the address listed once the Bulk Update is complete:

Please select the range of records you would like to update:
- Update the 0 Boxes I selected on the previous page
- Update the 4 Boxes matching my current query criteria

Because Bulk Updates may take several minutes to execute, please enter your email address to be notified when the Bulk Update is complete.

Email: 989RMO@tbsa.texas.gov

In the **Record Series** section, type the AIN that is replacing the obsolete AIN and click **Search**:  

In this search result the AIN was found (so the radio button is automatically selected and the field next to **Record Series** is completed). Keep in mind the search result could have multiple items (a search for 53 could include the results: 53, 153, 530, 1537, etc.) so select the radio button for the AIN that the search was intended:

**Record Series:** 53 - Contracts

<table>
<thead>
<tr>
<th>Organization Quick Description</th>
<th>AIN</th>
<th>RSIN</th>
<th>Record Series Title</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Texas Big State Agency - 988</strong></td>
<td>53</td>
<td></td>
<td>Contracts</td>
<td>AC</td>
</tr>
</tbody>
</table>
Go to the top right of the screen and click **Bulk Update:**

A **Message** dialogue box will display explaining how many items will be updated. Click OK:

An email will be received when the update is complete. The number of items updated (mentioned as “affected” in the below email) should match the total number of items that appear on the Home Page Grid:

If there are no Microforms for the obsolete Record Series, the task is complete for this obsolete Record Series, time to move on to the next obsolete Record Series with items that need to be updated.

If there are Microforms (Microfilm and/or Microfiche) for the obsolete Record Series, return to page 14 and click the Record Series tab to start the process again to update the obsolete Record Series for Microforms items.