

## Creating a New SRC Box

1. Log into Infolinx and go to the **SRC Boxes** tab. From this tab you can create, update/edit, and view SRC boxes.
2. Click on **New**, below the quick search boxes.
3. **Agency/Locality, Department, and Sub-Department** are pre-filled based on the information provided when you submitted the [Records Officer Designation and Responsibilities \(RM-25 Form\)](#).

If the Department or Sub-Department field is not pre-filled, you may select items from the dropdown list as appropriate.

4. Assign a **Retention Series** (record series number) to the box. You can do this in several ways.
  - If you know the records series number, enter it in the **Record Series Number** field and click Search. The series number will automatically be selected when there is only one result in the search.
  - Search using any of the other fields, like **Schedule Number** or **Records Series Title**.
  - Series are linked to their schedules; *it is not necessary, or advisable, to fill in every field in the retention series search area.*

The SRC only accepts records with a finite retention period. You won't see series with open-ended retentions (i.e. retain as long as administratively necessary) or permanent records returned in your search results. The SRC also will not accept any boxes with less than six months remaining in their retention period.

5. Assign an **Agency/Locality Box #** to your boxes. This information is recommended but not required.

It is helpful to assign a unique number to a box, as there can be many unrelated boxes with the same Agency/Locality Box #.

6. Indicate a **Contents/Range** of the records.

This is a general description or statement of the contents of the box. The Contents/Range field allows more specific information than the series title to be entered, while being more general than a box inventory. This field is not intended for a listing of all file names/numbers contained in the box.

7. The **From Range** and **To Range** lists the range of files included in the box.

This can be file/case numbers, names, parts of the alphabet, etc. This should be unique from the information in the Contents/Range field.

8. Fill in the **From Date** and **To Date** fields. This is the date range of the records in the box you are creating.

All dates must follow the MM/DD/YYYY format.

9. The **Cutoff Date** is the point at which Infolinx starts calculating destruction on the boxes.

The Cutoff Date will automatically calculate when the Cutoff Event of the selected records series is based on calendar, state/federal fiscal, or academic year.

All other Cutoff Events must be manually entered. In that case, the Cutoff Date is most often, but not always, the same as the To Date. For example, a box of records for clients last seen in 2000, with a record series selected whose Cutoff Event is “after birth,” would have a Cutoff Date of the youngest child’s birthday.

10. The **Scheduled Destroy Date** will automatically calculate when the box is saved. This date is based on the retention period of the specified series and the Cutoff Date.

11. The default value for **Media Type** is set at Paper. If the box contains other media, such as microfilm or CD, the field selection can be changed through the dropdown menu.

12. The default value for **Container Type** is set at Record Center (1 cu.ft).

The SRC will not accept [boxes](#) larger than 1 cubic foot.

13. The last information on this page relates to **Holds**. Records may only be placed on hold when there is an active audit, investigation, or litigation.

14. After you have entered all the information, select:

- Save & New, if you are continuing to enter additional boxes
- Save & View, if you want to look at the record you have just created
- Save & Close, if you want to save the record and return to the SRC Boxes screen

- Close, if you want to return to the SRC Boxes screen without saving the record

When you have successfully saved a SRC Box, an alert will pop up giving you the SRC Box barcode number.

### Tips

- Fields with an asterisk (\*) are required. Infolinx will not allow you to create a box without information entered into those fields. Other fields are not required but can be helpful in identifying items from their Infolinx records.
- Infolinx allows use of a wildcard (%) in its search functions.
- Infolinx won't allow you to create boxes for records that are past their retention periods.
- If you're entering many boxes that have the same series and contents, you can use a previous box as a template.

Locate the box by doing a search and then click on the barcode number in the returned results. That will display the entire record for that box—the search screen only lists selected fields.

Click on the New button at the top of the screen. The page that displays will contain any fields that are set to carry over. These fields are: From Date, To Date, Retention Series, Contents/Range, Cutoff Date (if the series has one of the four auto-calculated cutoff events), Media Type, and Container Type.

Continue creating boxes as described above.

### Questions?

If you've created a SRC Box that needs to be removed from Infolinx, send a list of the SRC Box Barcode numbers and a request for deletion to [Matt Ball](#).

Once a SRC Box has been deleted, it cannot be restored. If a box is deleted that is going to be returned to SRC storage, it will have to be re-entered into Infolinx and given a new barcode.