

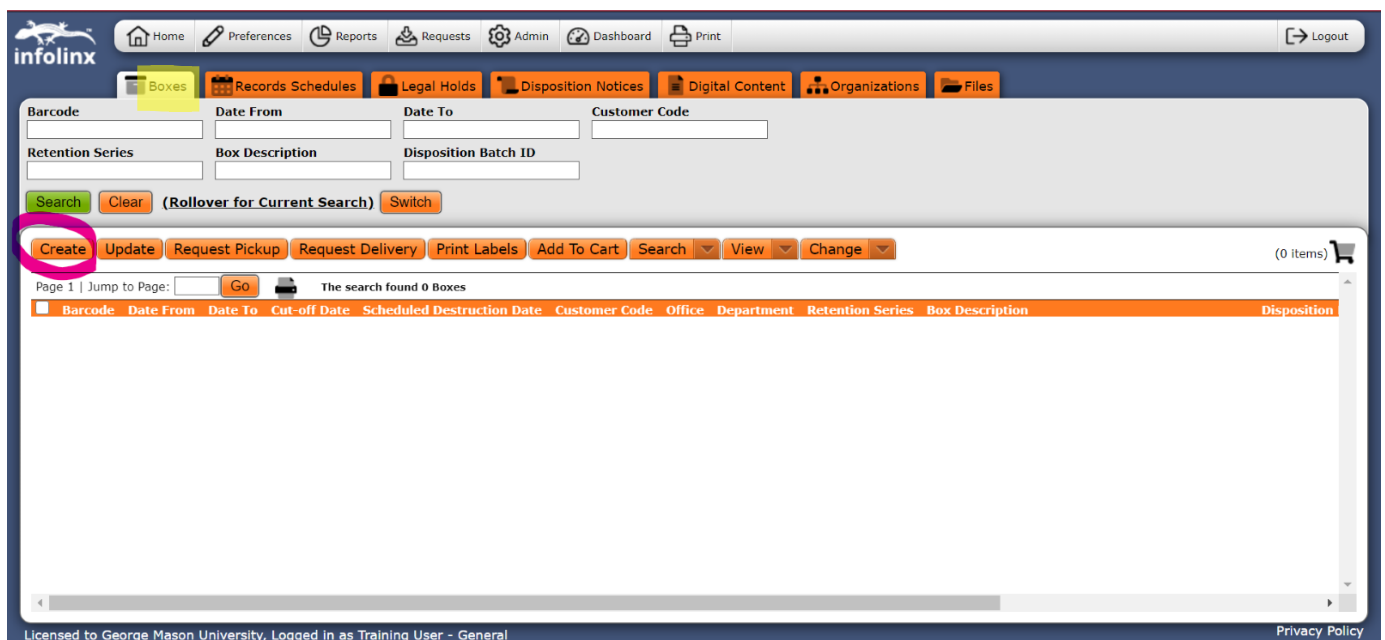
## Infolinx Instructions

**\*\* Please separate record types when packing boxes for retention purposes.\*\***

Step 1: Log into Infolinx using your GMU credentials.

<https://infolinx.gmu.edu/HomePage/main.aspx>

Step 2: To create a box, select the “**Boxes**” tab, and then select the “**Create**” button.



The screenshot displays the Infolinx web application interface. At the top, there is a navigation bar with icons for Home, Preferences, Reports, Requests, Admin, Dashboard, and Print, along with a Logout button. Below this is a secondary navigation bar with tabs for Boxes, Records Schedules, Legal Holds, Disposition Notices, Digital Content, Organizations, and Files. The main content area features a search form with fields for Barcode, Date From, Date To, Customer Code, Retention Series, Box Description, and Disposition Batch ID. Below the search fields are buttons for Search, Clear, (Rollover for Current Search), and Switch. A row of action buttons is visible, with the 'Create' button circled in red. Other buttons include Update, Request Pickup, Request Delivery, Print Labels, Add To Cart, Search, View, and Change. Below the buttons, there is a page indicator 'Page 1 | Jump to Page: [ ] Go' and a message 'The search found 0 Boxes'. A table header is visible with columns: Barcode, Date From, Date To, Cut-off Date, Scheduled Destruction Date, Customer Code, Office, Department, Retention Series, Box Description, and Disposition. The footer contains the text 'Licensed to George Mason University, Logged In as Training User - General' and a Privacy Policy link.

Step 3: Enter the dates your records range from and to. The “**Date From and Date To**” covers the length of the entire box’s contents. The oldest record’s **starting date** should be entered as the “**Date From**”, and the most recent **ending date** should be entered as the “**Date To**”. (ex. From 01/01/2015 To 12/31/2019). The “**Cut Off Date**” should reflect the **most recent record date, end of semester date** or **end of fiscal year date** to generate a destruction date in Infolinx.

infolinx

Home Preferences Reports Requests Admin Dashboard Print Logout

**Create Box** Cancel Set Defaults Save & Close Save & View Save & New

Media Type:

Date From:

Date To:

Cut-off Date:

Box Index:

Box Content:

Country:

Notes:

Box Batch Series:

Last Inventoried Date:

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Step 4: Enter the Retention Series under the “**Records Schedule**” section and click the “Search” button. The Retention Schedule will appear and be added.

Retention Schedules can be searched here:

[https://www.lva.virginia.gov/agencies/records/sched\\_state/search.asp](https://www.lva.virginia.gov/agencies/records/sched_state/search.asp)

\*\* a youtube video is linked on our website for additional help searching schedules

infolinx

Home Preferences Reports Requests Admin Dashboard Print Logout

**Create Box** Cancel Set Defaults Save & Close Save & View Save & New

Fields marked with an \* are required.

\*Organization:

Search Here:  Customer Code  Office  Department  Department Status

Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button. Search Clear

**Records Schedule:**

Search Here:  Retention Series  Schedule Title

Current Search: There is no current Records Schedule query. To search Records Schedule, enter your criteria and click the Search button. Search Clear

Box Description:

Box Size:

Box Status:

Media Type:

Date From:

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Step 5: Under ‘**Box Description**’ specify if these records are active or inactive records (ex. Terminated personnel, graduated student files, open/closed contracts).

The screenshot shows the 'Create Box' form in the infolinx system. The form includes several sections: 'Organization' with search fields for Customer Code, Office, Department, and Department Status; 'Records Schedule' with search fields for Retention Series and Schedule Title; and a 'Box Description' field which is highlighted with a pink circle. Below these are dropdown menus for Box Size, Box Status, and Media Type, and a Date From field. The top navigation bar includes Home, Preferences, Reports, Requests, Admin, Dashboard, and Print, along with a Logout button. The bottom of the page shows the license information: 'Licensed to George Mason University, Logged in as Training User - General' and a Privacy Policy link.

Step 6: Under “**Box Contents**,” list the types of records in the box in detail. (Ex. Files for terminated employees from 2012-2018) *[To avoid confusion, please be specific and avoid abbreviations.]*

If adding record information for electronic records, please include the amount of data you have. (ex. 50GB, 100MB, 10TB)

The screenshot shows the 'Create Box' form in the infolinx system, focusing on the 'Box Contents' section. The form includes fields for Media Type, Date From, Date To, Cut-off Date, Box Index, Box Contents (highlighted with a pink box), Country, Notes, Box Batch Series, and Last Inventoried Date. The top navigation bar is the same as in the previous screenshot. The bottom of the page shows the license information: 'Licensed to George Mason University, Logged in as Training User - General' and a Privacy Policy link.

Step 7: In the “Notes” section, input the information of the **individual who packed the box** (name, email, phone number) and **where the boxes are located** (building/room number), and any additional notes for the URM team, oddities, or internal retention policy.

The screenshot shows the 'Create Box' form in the infolinx system. The form includes the following fields and controls:

- Media Type:
- Date From:
- Date To:
- Cut-off Date:
- Box Index:
- Box Content:
- Country:
- Notes:  (highlighted with a pink box)
- Box Batch Series:
- Last Inventoried Date:

Buttons at the top right: Cancel, Set Defaults, Save & Close, Save & View, Save & New.

Footer: Licensed to George Mason University, Logged in as Training User - General. Privacy Policy.

Step 8: If applicable, please complete the “Legal Holds” section for any known legal holds currently in place.

The screenshot shows the 'Create Box' form in the infolinx system, with the 'Legal Holds' section expanded. The form includes the following fields and controls:

- Last Inventoried Date:
- Procite Box Number:
- Procite Box Notes:
- Legal Holds:  (highlighted with a pink box)

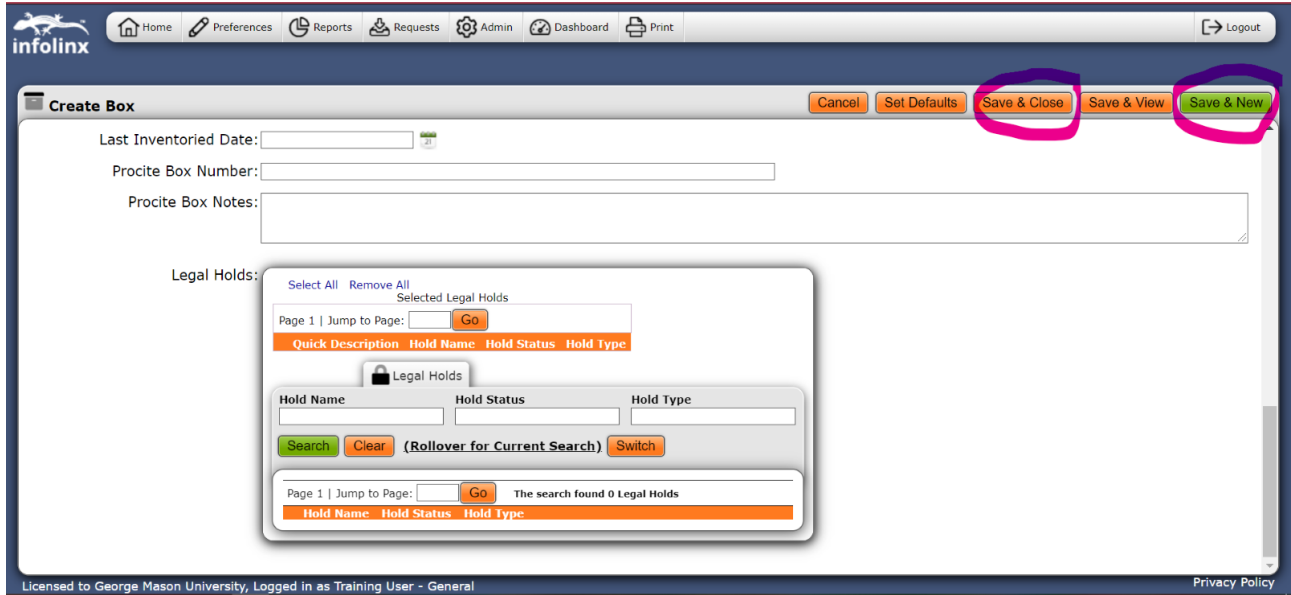
The 'Legal Holds' section contains the following controls:

- Select All Remove All
- Selected Legal Holds
- Page 1 | Jump to Page:  Go
- Quick Description Hold Name Hold Status Hold Type
- Legal Holds
- Hold Name Hold Status Hold Type
- Search Clear (Rollover for Current Search) Switch
- Page 1 | Jump to Page:  Go The search found 0 Legal Holds
- Hold Name Hold Status Hold Type

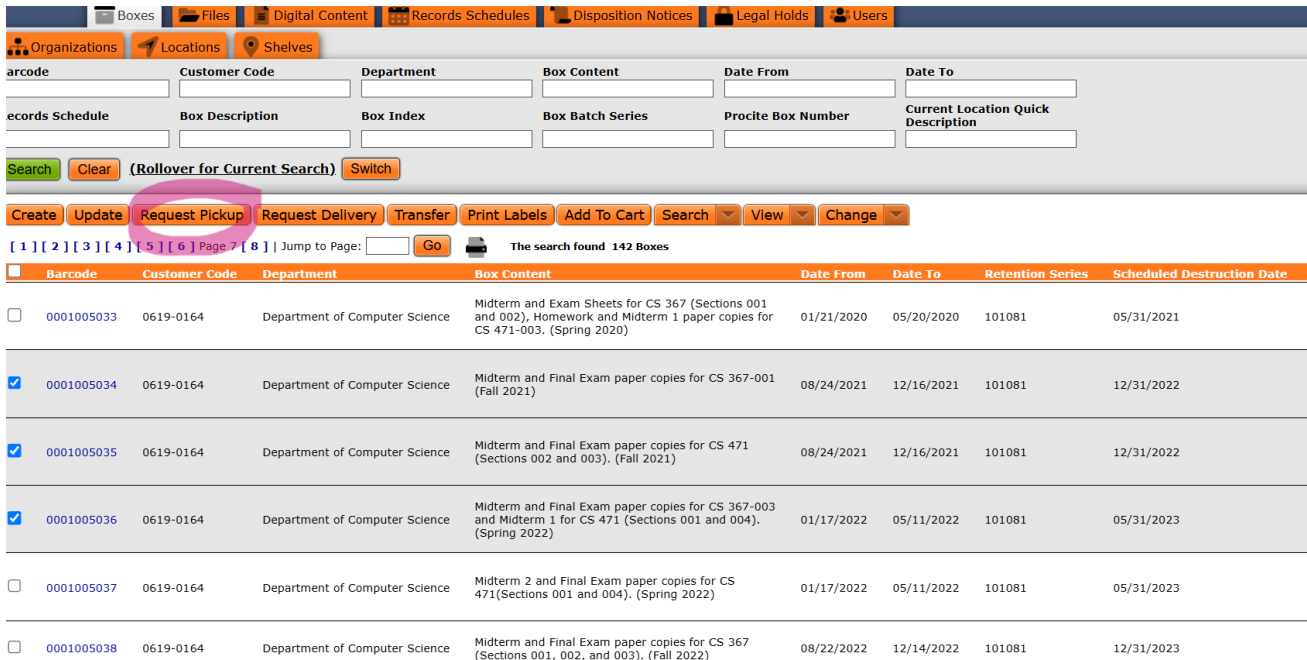
Buttons at the top right: Cancel, Set Defaults, Save & Close, Save & View, Save & New.

Footer: Licensed to George Mason University, Logged in as Training User - General. Privacy Policy.

Step 9: Once all of the record information has been entered, select “**Save and View**” to review the information, “**Save and Close**” to exit, or “**Save and New**” to create a new box.



Step 10: Once all of your boxes have been created and saved, select the boxes you want to have picked up and select “**Request Pickup**.” Review your boxes on the next screen and then select “**Request Pickup**” again.



Request Items to be refilled

Cancel Request Pickup

Items to be refilled:

Page 1 | Jump to Page:  Go

Change Destination	Record Description	Current Location	Home Location	Destination
Apply	0001005034	Volgeneau School of Engineering - Department of Computer Science	University Records Center	University Records Center
Apply	0001005035	Volgeneau School of Engineering - Department of Computer Science	University Records Center	University Records Center
Apply	0001005036	Volgeneau School of Engineering - Department of Computer Science	University Records Center	University Records Center

Enter, scan, or click the Search button to specify a location, then click Apply to set the destination for checked rows above:

Users Locations Shelves

User Name Role First Name Last Name Email User Barcode

Search Clear (Rollover for Current Search) Switch

Page 1 | Jump to Page:  Go The search found 0 Users

User Name	Role	First Name	Last Name	Email	User Barcode
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Apply All