



RECORDS MANAGEMENT SOFTWARE

Track, audit, and secure the complete lifecycle of enterprise records, including digital and physical records. Infolinx software is built with a powerful core feature set and optional add-ons, for a comprehensive, scalable records and information management solution.

CORE FEATURE SET



Track Physical Records & Assets

Physical Records Management

- Track physical assets, including files, boxes, and other items with user-defined fields
- Simple check-in/check-out and transfer of records
- Create color and barcode labels
- Online pickup and delivery requesting with optional request approval workflow



Retention Schedule & Legal Holds Management

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- Create and manage retention schedules and automatically apply policies
- Configure retention schedules based on meta-data fields
- Supports time, event, and event + time-based series
- Apply legal hold to any record



Role-Based Security

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- Configure role-based security groups via SAML2-compliant Identity Management Solution
- Configure permissions and restrict access to any function, view, or records in the application, including form fields
- Electronic signature with Single Sign-On (SSO) support



Workflow Notifications

Comprehensive Audit Trail

- Improve accountability with detailed, permanent history of all activity, tracked in real-time
- Capture all system configuration changes, user sessions, login history, and reason for changes
- Searchable history with export option

Records Disposition Support

- Auto-calculation of retention dates
- Easily filter and find available records series based on user
- Create and view multiple disposition reports including disposition approval, disposition pick list, and certificate of destruction

Space Management

- Identifies available space on shelves, bays, and aisles in storage facilities and suggest allocations for incoming items
- Assign storage locations when boxes or assets are put on shelves or in advance
- Print location labels and create space management reports

Advanced Searching & Field Display

- Search for records by any data field in the application
- Supports all common search types, including keyword and full-text search
- Easily save, sort, and export search results
- Configure views based on records classification with conditional field display

Workflow Notifications

- Create custom, event-driven email notifications for specific users
- Configure notifications based on user actions and events, and changes to data, form, or list values
- Easily add new notifications from user-defined fields

Infolinx is a **powerful records and information management platform** built to address the complex regulatory environment faced by today's organizations



File & Asset Tracking via Barcode or RFID

Barcode & RFID Support

- Fully integrated barcode and Gen II RFID functionality for fast, efficient tracking
- Compatible with tethered, wireless, and/or portable barcode devices
- Check items in or out instantly at workstations, file rooms, or records centers bypassing manual data entry

Bulk Create, Update, Delete Functionality

- Bulk create, update, delete, and/or expunge records
- Create an incremental series of items, such as barcode labels for files or boxes
- Search and replace functionality for multiple records

OPTIONAL MODULES



Digital Records Management

Digital Records Management

- Associate digital records with physical records in Infolinx
- Apply retention schedules and legal holds to physical & digital records for unified policy management
- Manage, index, and classify digital records from file shares and repositories
- Make your content searchable and OCR any standard electronic file, such as PDFs, images, and Office documents
- Redaction functionality with PDFs

Off-Site Storage Vendor Integration

- Easily request and approve pickup or delivery of off-site records via integrations with third-party storage vendors
- Available integrations include Iron Mountain Connect™ and O'Neil oneilBridge™



Off-Site Storage Vendor Integration

Supply Item Requesting

- Request delivery of new boxes, file folders, or barcode labels
- Allows records managers to track history of supplies over time

Billing Module with Cost Center Charge-Back

- Ideal for enterprise record center management with multiple cost centers
- Eliminate manual calculation and track records request costs
- Create invoices and reports for fees associated with records requests

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