Gimmal

Quick Start Guide - Administrators

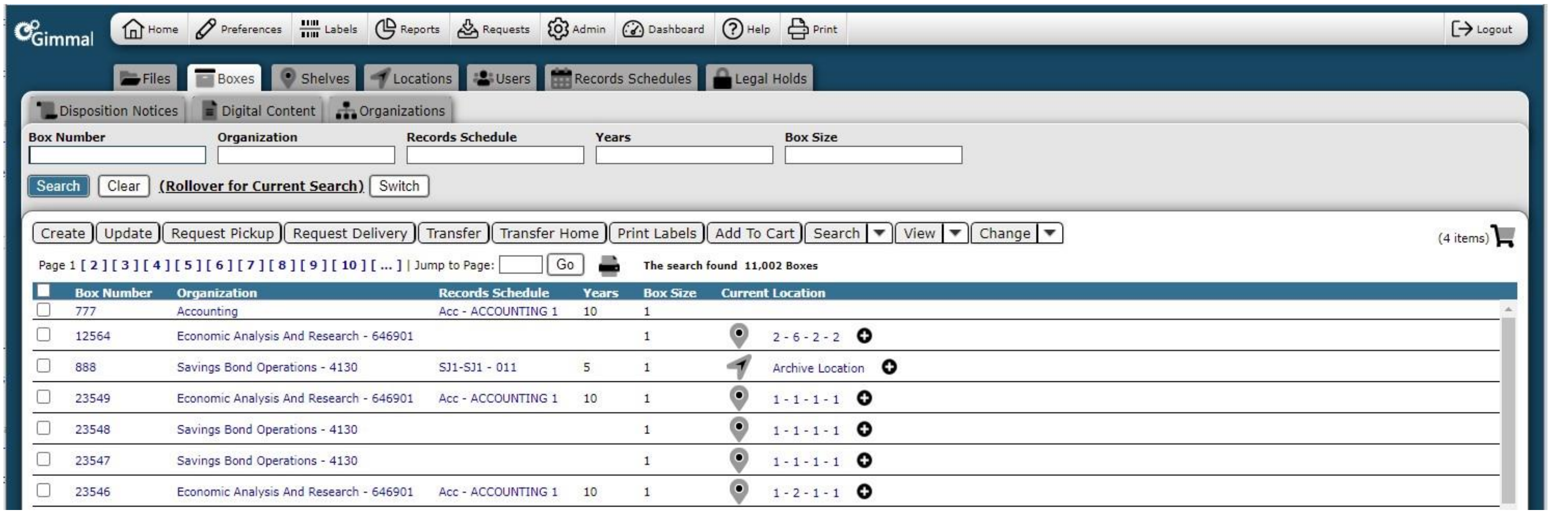
Gimmal Physical

Contents

Version History

Version	Approved By	Effective Date	Product Version	Description of Change
1	Alex Caldas	11/10/2020	3.8	Created for Gimmal Version 3.8
2	Will Irwin	10/11/2021	3.11	Created for Gimmal Physical v3.11
3	Terry Butler	03/01/2022	3.11	Updated screen shots and format
5	Marta Farensbach	12/1/2022	3.12	Minor updates for Gimmal Physical 3.12

Gimmal



Quick Start Guide

Top Level Menu – provides access to the various indicated functions
Data Tabs – used to access the various items being tracked
Quick Search – used to query within tabs
Action Menu – provides access to listed actions
Home Page Grid – displays queried results

Gimmal

Administrator Tasks

Administration tasks encompass the following:

Administration Close

Security Access

Name	Description
Change Password	Change your password.
Licenses	Manage the available licenses in the system.
Logins	View logins.
Login Details	Manage login preferences and password complexity.
Roles and Permissions	Manage the roles and permissions in the system.
Role to Role	Configure Role to Role Management.
Sessions	View sessions.

Configuration

Name	Description
Action Toolbar	Configure the action toolbar for each data tab.
Application Settings	Configure settings for the application.
Broadcast Notifications	Send broadcast message to Gimmal users.
Conditional Field Display	Configure settings for Conditional Field Display.
E-Signature Events	Configure events such that they require an E-Signature.
Field Display	Manage Quick Search and Home Page Grid layout for each data tab.
Field Display - Advanced	Configure database settings for the fields and tabs.
Import Profiles	Add or remove import profiles.
Label Design Files	Add or remove label design files.
Label Profiles	Add or remove label profiles.
Notifications	Add or remove notifications.
Quick Description Fields	Manage quick descriptions for each data tab.
Reports	Create and edit reports for Gimmal.
Resource Files	Manage resource files for the application.
Tab Filters	Add or remove data filters.

Data

Name	Description
Application History	View & Search Application History.
Global Search	Execute a global search across data tabs.
Import	Import data.
Import Logs	View logs of previous imports.
List Values	Add or remove values from drop down lists.
Space Management	Manage available space for storage facilities.
Utility	Download data from collection device.

Technical

Name	Description
Application Log	View the Application Log.
Reset Application Cache	Reset the application's cache.
Technical Information	View Technical Information about Gimmal.

Licenses

1. To manage Licenses, click on the Licenses link.
2. Type in the license key from Gimmal Physical System Solutions and click on the Update License button.
3. Displays Current licenses including login licenses, currently logged in users, and extra features.

Logins

1. To view logins, click on the Logins link.
2. Login tracking searches can be completed in the grid.
3. Tracking information can be deleted by clicking on the Delete Records link on the upper right of the screen.

Login Details

1. To manage password complexity click on the Login Details link.
2. Choose from the options to set password complexity and click Save.

Roles and Permissions

1. To manage Roles and Permissions click on the Roles and Permissions link.
2. Click on the Create button to create a new role.
3. Type in the desired information and click on the save button.
4. Edit Role Permissions: all the security settings and checkboxes
5. Edit Role Preferences: all the Role level preferences and role email address field. This email is used for any notifications set at the role level.

Role to Role

1. To manage which roles can manage other roles click Role to Role.
2. Choose a role in the first drop down. You will see previously selected roles appear in the table below that.
3. Roles in the first table will show on the Roles and Permissions page for any user in the role selected in the drop down.
4. Use the radio and remove buttons to add to or remove roles from the selected list. Sessions 1. To view sessions, click on the Sessions link.
5. Sessions of users can be deleted by clicking on the Delete Records link on the Session Tracking screen.