Gimmal Physical

Gimmal Physical

22 August, 2025

Table of Contents

Gimmal Physical enables unified and secure management and disposition of Physical Records. Physical records can be classified, located, and governed in-house, off-site or using the Gimmal Cloud.

Use the links below to access Gimmal Physical documentation including guides, release notes, technical information and tutorials.

The current version of Gimmal Physical reflected in this documentation is 4.0. For documentation on earlier versions, please see Legacy Documents (see page 328)or contact support@gimmal.com.

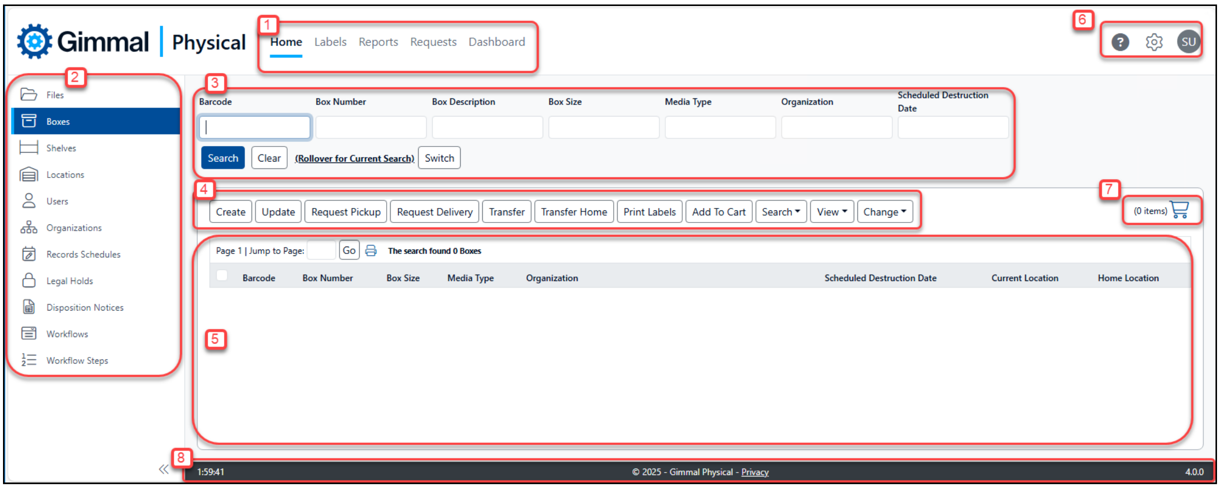
1 Guides

These guides are designed to walk you through the functionality of Gimmal Physical.

Please note: These guides reflect the most current version of the product. Please refer to the legacy section or contact support[1]for relevant documentation for older versions of the application.

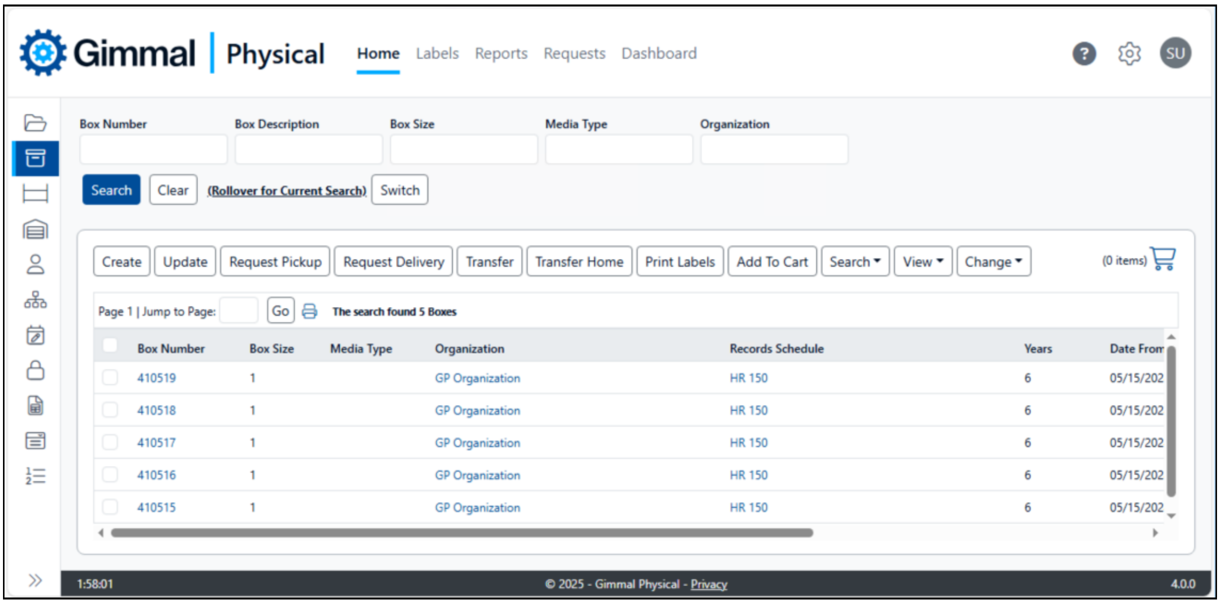
Please use the tree view on the left or the links below to find the appropriate article of interest.

1.1 Home Page Overview



1 Home Page with expanded Side Navigation

1. mailto:support@gimmal.com



2 Home Page with collapsed Side Navigation

1. **Navigation Ribbon** – Provides access to the various indicated functions.
2. **Data Tabs** – Collapsible pane for accessing the different item types being tracked, both logical and physical. Also referred to as the Side Navigation or Left Navigation.
3. **Quick Search** – Frequently used fields for querying records within the selected tab.
4. **Action Bar** – Configurable actions available for each Data Tab. Actions available depends on the item type of the current Data Tab.
5. **Home Page Grid** – Displays search results and allows viewing data, and selection of items for bulk actions (requests, updates, etc.)
6. **Help, Configuration, Logout** -
   a. **Help** icon - Clicking opens a browser tab to Gimmal Physical's online documentation.
   b. **Gear** icon - Used to access the application Preferences, and Admin configuration pages.
   c. **User** icon - Used to logout of the application.
7. **Shopping Cart** - Used to aggregate multiple items for Pickup and Delivery requests.
8. Session clock and application version.

1.2 Installation Guide

1.2.1 Introduction

This article outlines the process for configuring a new on-premises installation of Gimmal Physical Version 4.0.

Note: If you are already using an earlier version of Gimmal Physical, please contact Gimmal support for assistance with the upgrade process.

1.2.2 Prerequisites

The following prerequisites are required for the installation of Gimmal Physical

- Database Server
  - Minimum SQL Server compatibility level 120 (SQL Server 2014)
  - Full-Text and Semantic Extractions for Search feature installed
  - The account used during the installation process must have the following roles in SQL Server:
    - dbcreator
    - securityadmin
      Note: If you are restoring or otherwise replacing an ***existing*** database, the account used during installation must be granted **dbreader, dbwriter,** and **dbowner** rights on that database.
- Visual C++ Redistributable. Links to these files can be found in the installer wizard:
  - Microsoft Visual C++ 2010 Redistributable (x86)
  - Microsoft Visual C++ 2010 Redistributable (x64)
- App Server(s)
  - .Net v4.8
- Required Server Roles (via Server Manager)
  - IIS Web Server
    - Web Server
      - Common HTTP Features
        - Default Document
        - Directory Browsing
        - HTTP Errors
        - HTTP Redirection
        - Static Content
      - Health and Diagnostics
        - HTTP Logging
      - Performance
        - Static Content Compression
      - Security
        - Request Filtering
        - Basic Authentication

                - Windows Authentication
            - Application Development
                - .NET Extensibility 4.8
                - ISAPI Extensions
                - ISAPI Filters
                - ASP.NET 4.8
        - Management Tools
            - IIS Management Console
                - IIS 6 Management Compatibility
                    - IIS 6 Metabase Compatibility
                    - IIS 6 WMI Compatibility
                    - IIS 6 Scripting Tools
- Required Server Features (Via Server Manager)
    - .NET Framework 3.5 Features
        - .NET Framework 3.5 (includes .NET 2.0 and 3.0)
    - .NET Framework 4.8 Features
        - ASP .NET 4.8
        - WCF Services
            - HTTP Activation
    - Windows Process Activation Service
        - Process Model
        - Configuration APIs

Please Note:

- If installing Gimmal Physical using HTTPS/SSL mode, ensure that the SSL certificate is added to the Trusted Certificate Store before installing the application.
- The install will fail if passwords contain one or more equals signs (=) .

In some environments with elevated server hardening, the installer may fail to properly validate the provided Server and/or App Pool credentials. Where this occurs, please ensure that any Group Policy restrictions on Incoming and Outgoing NTLM traffic are disabled or set to 'Allow All' to ensure the validation of account credentials.
If you need further assistance, please contact Gimmal Support.

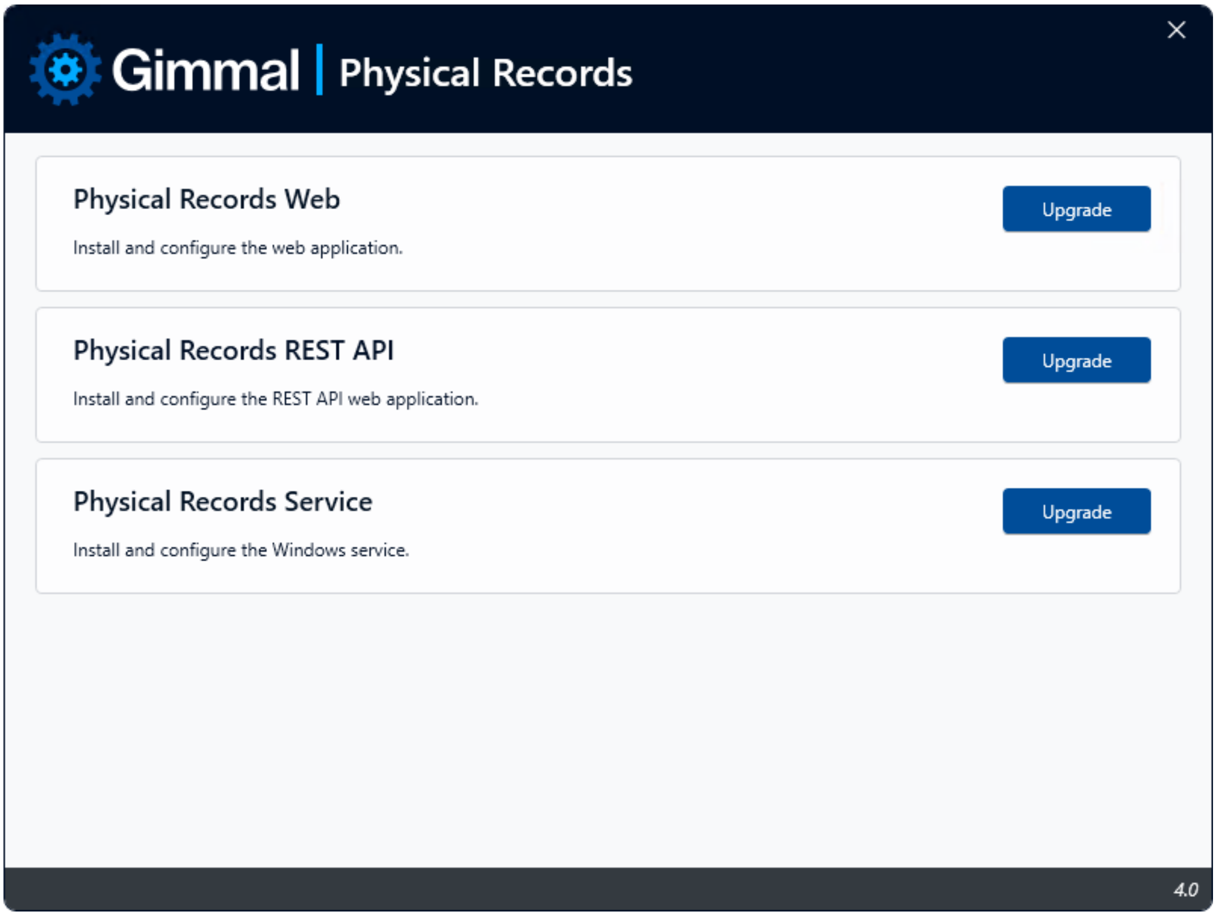
1.2.3 Installation

Gimmal Physical will provide an installation file (iso) for use in the installation process. This file includes the installer and many of the installation components.

To run the installer, please follow the steps below:

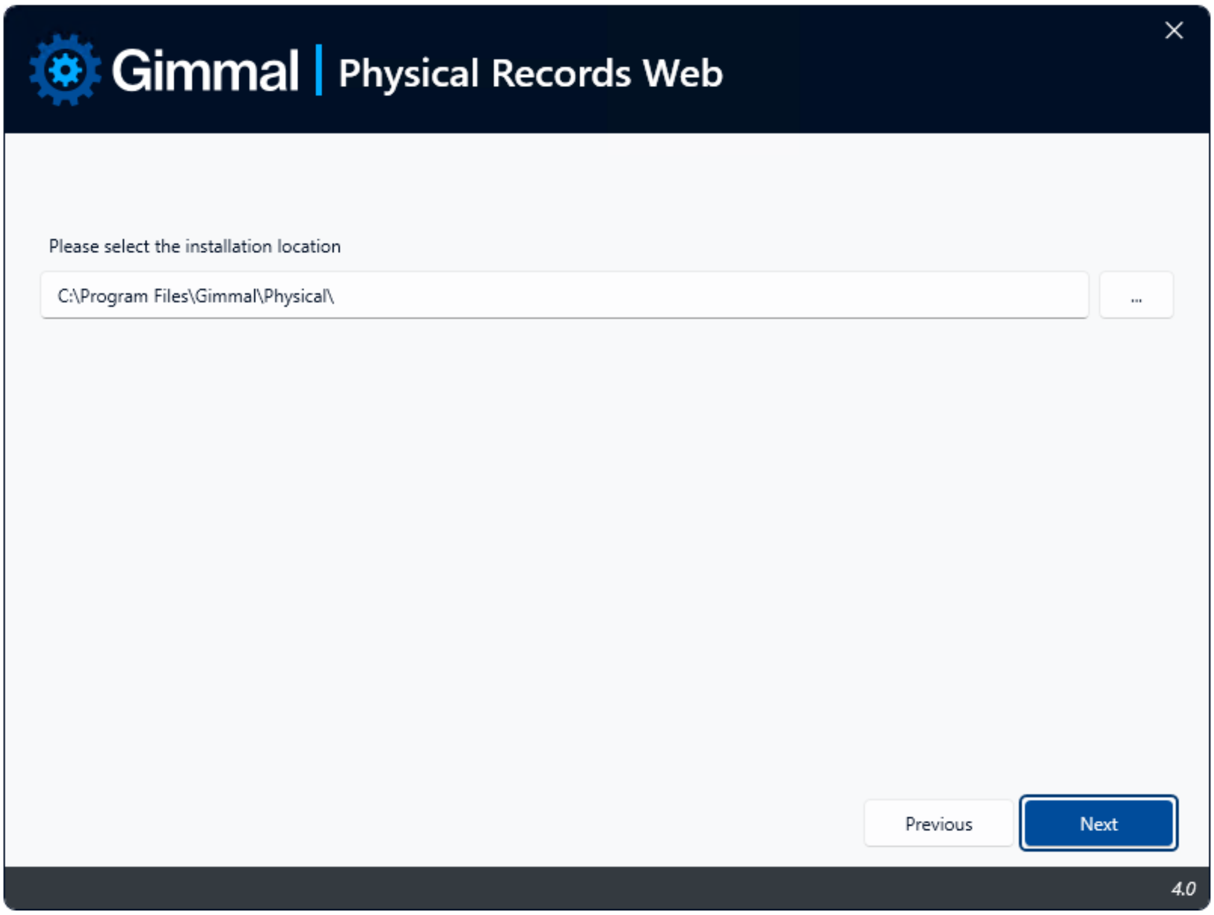
1. Mount and open the provided iso format installation package
2. Double-Click the *setup.hta* to run the installer.
3. The Installer home page opens with a number of choices.
    - Prepare - provides links to useful documentation
    - Prerequisites - provides links to the two Visual Studio C++ Redistributable prerequisite components that may need to be installed, if not present
    - Install - handles the installation of core components (see below)
    - Other Information - links to support and the Gimmal website

4. If necessary, click on each of the entries listed under Prerequisites to install them
5. To Install the required components to run the software, click *Core Components* under the Install option
6. Click ‘Yes’ on the UAC page to continue.
7. The main installation page will open, providing a choice of the components to install. For a complete program experience, all components need to be installed.
   Note: The installer will check for prerequisites as it continues

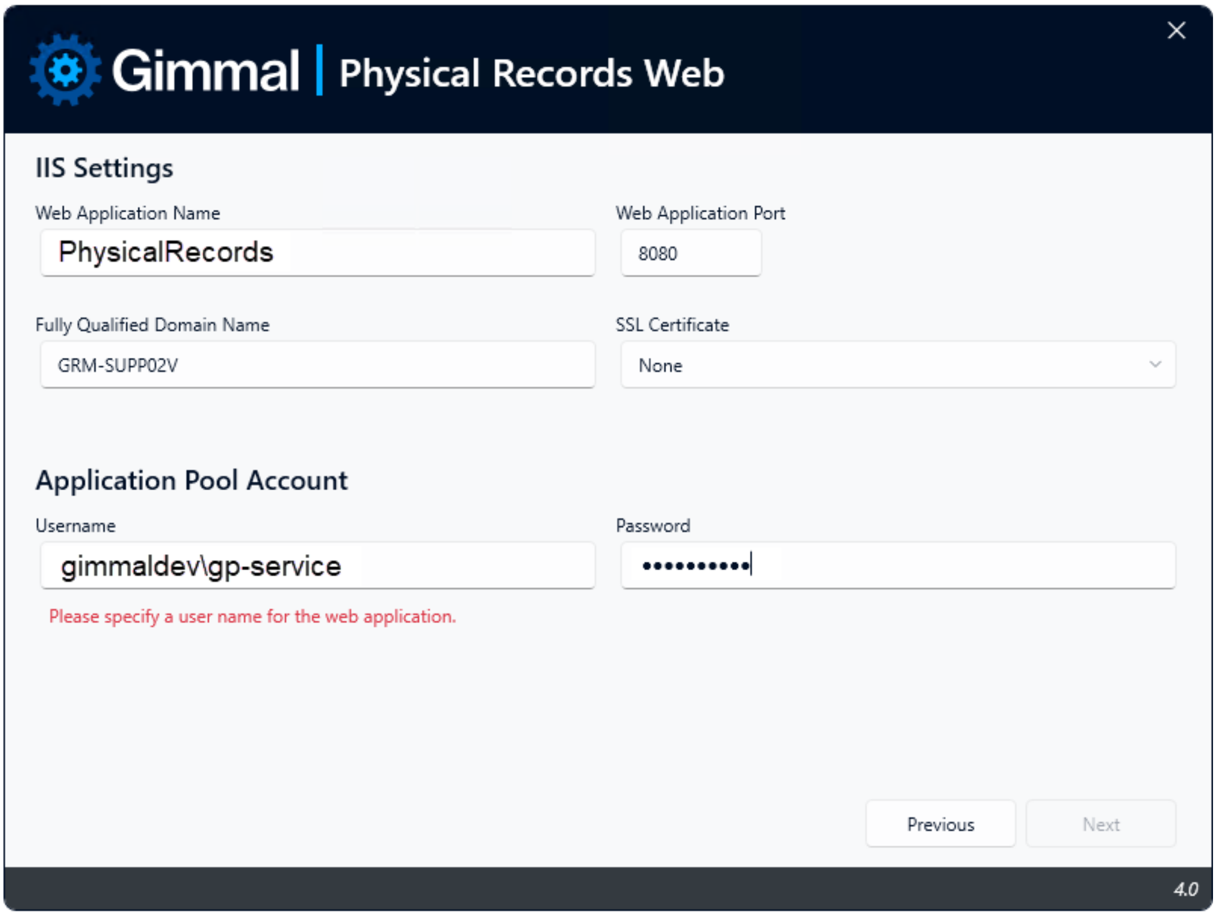


1.2.3.1 Physical Records Web

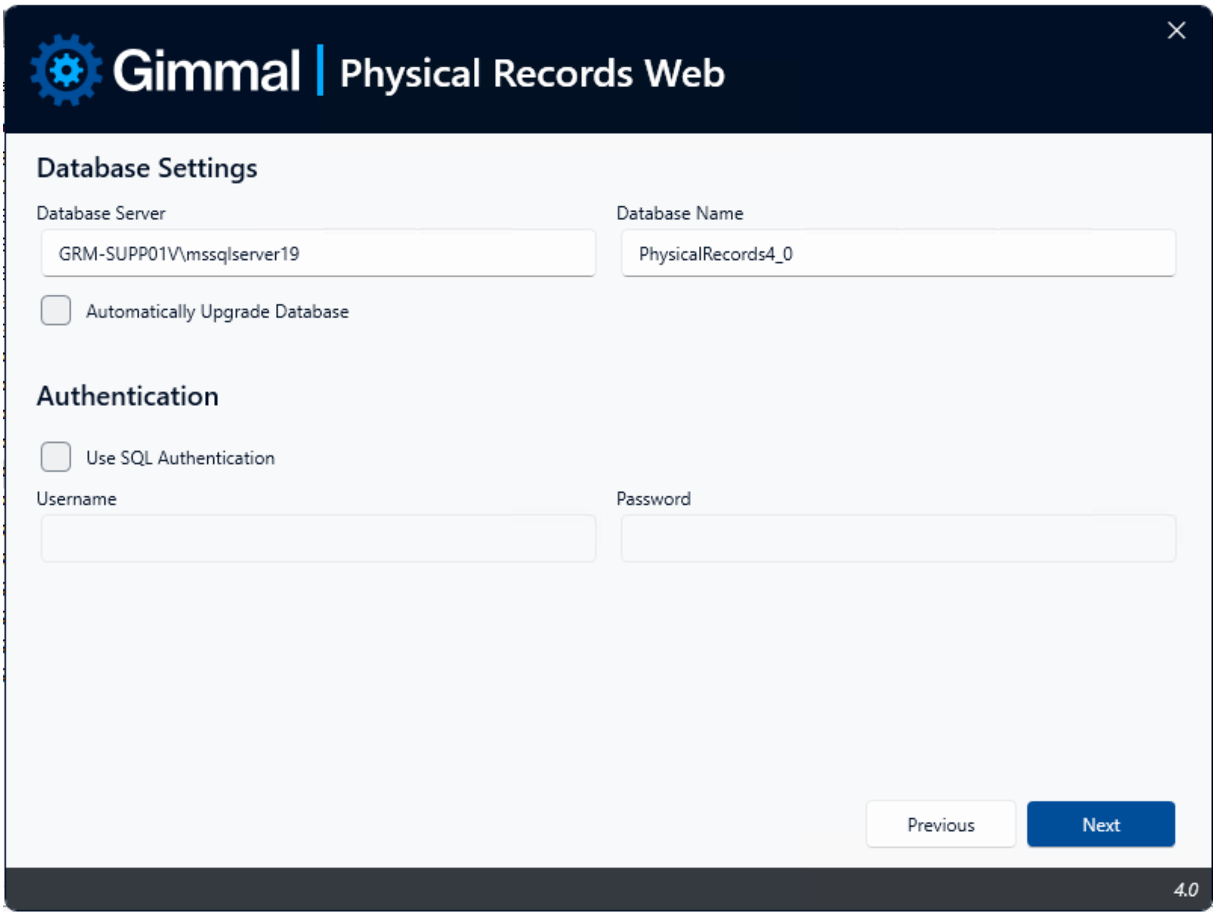
1. The Web Installer will first verify the Prerequisites. If they verify successfully, click ‘Next’. If any anomalies are detected, resolve them, then restart the process.
    a. Choose the installation path and click ‘Next’



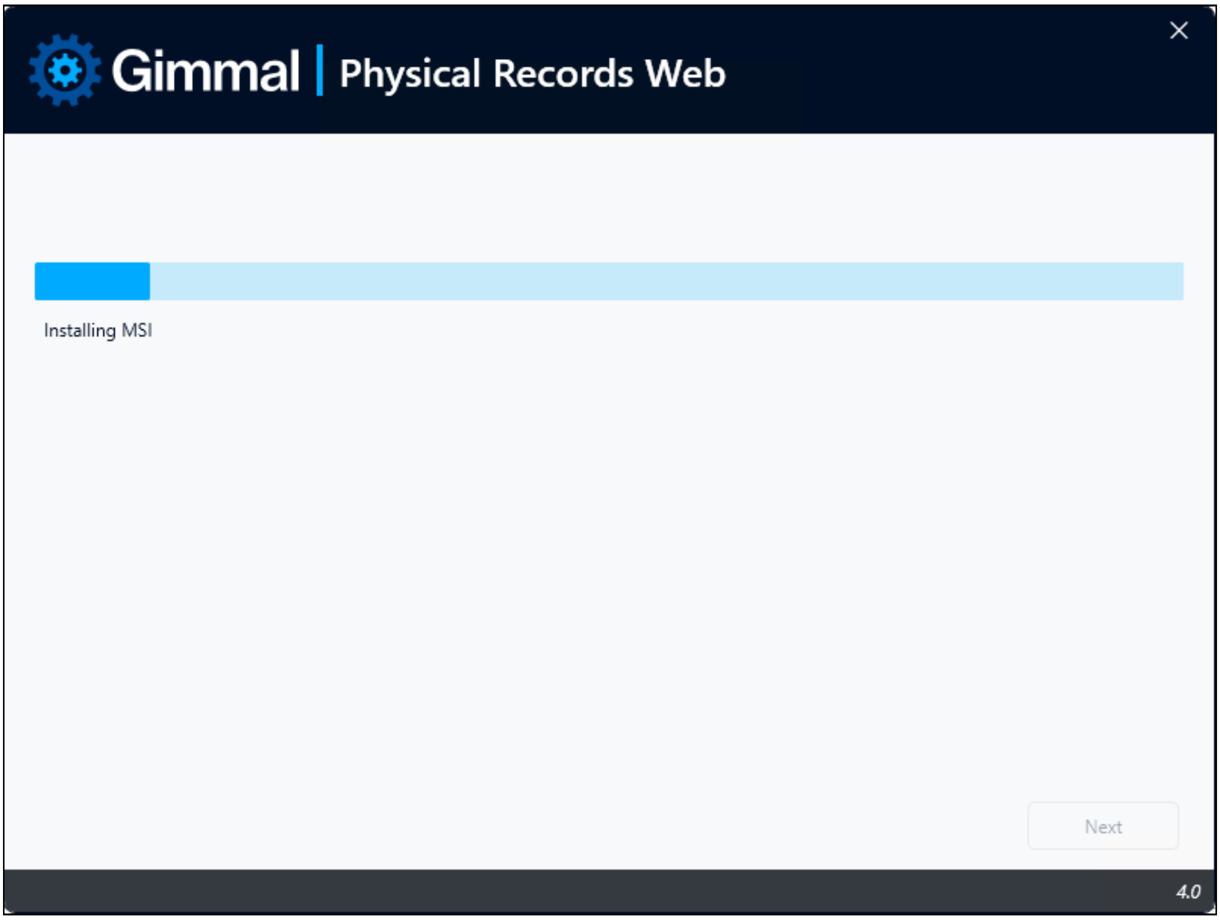
2. Configure *IIS Settings*
    a. Web Application Name: The default is PhysicalRecords
    b. Web Application Port: The default is 8080
    c. Fully Qualified Domain Name: Provide the FQDN for the current server host (or alternatively, the FQDN DNS name to be used)
    d. SSL Certificate Choose from the list of installed certificates
    Note:
        i. These settings can be configured manually after the installations, but it is more efficient to set them now.
        ii. To avoid issues the selected certificate *must* be in the Trusted Certificate Store.
3. Set *Application Pool Account*
    a. Username for a domain account. Note, use domain\username format
    b. Password for the domain account
    Note: The Application Pool account requires Full Control to the application directory.



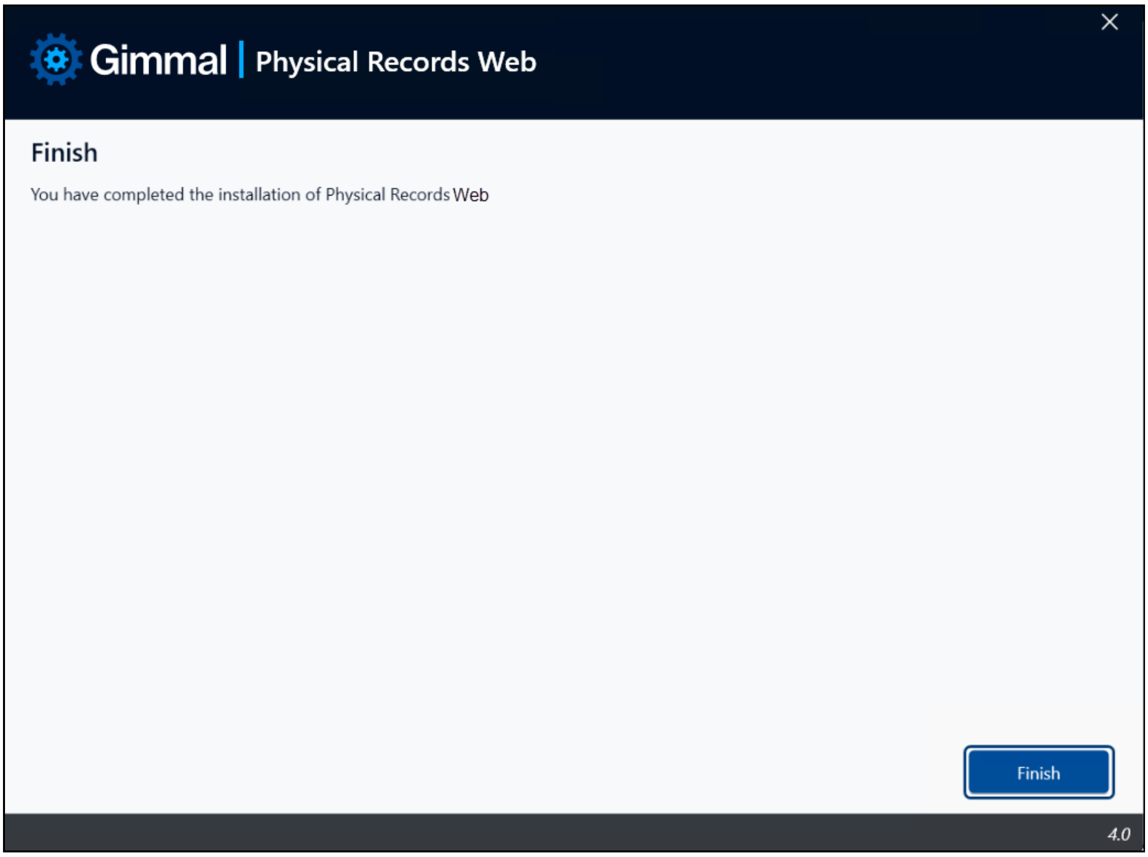
4. Click 'Next'
5. Configure Database Settings
    a. Database Server - The name of the database server which will host this database
    b. Database Name - the name of the database. The default name is *PhysicalRecords*
    c. Automatically Create Database - This option should be **unchecked** for on-premises installations. However, it is checked by default, this option will create a new baseline database on the database server listed above. This is not recommended for on-premises clients. In most cases, on-premises clients will receive a preconfigured database to import and they should uncheck this option.
    Note: If you are using non-standard regional settings and receive an error, please see note below.
6. Authentication (Database)
   Note: If these values are not set, then Windows Authentication will be used to connect to the database. In this case, the logged in user will have the appropriate permissions.
    a. Use SQL Authentication - Check this option if you prefer to use SQL authentication with the credentials listed below



7. Click ‘Next’ to install the Physical Records Web and configure the database.



8. The installer will verify all components have installed correctly. Click ‘Next’.
9. Click ‘Finish’ to return to the main menu.



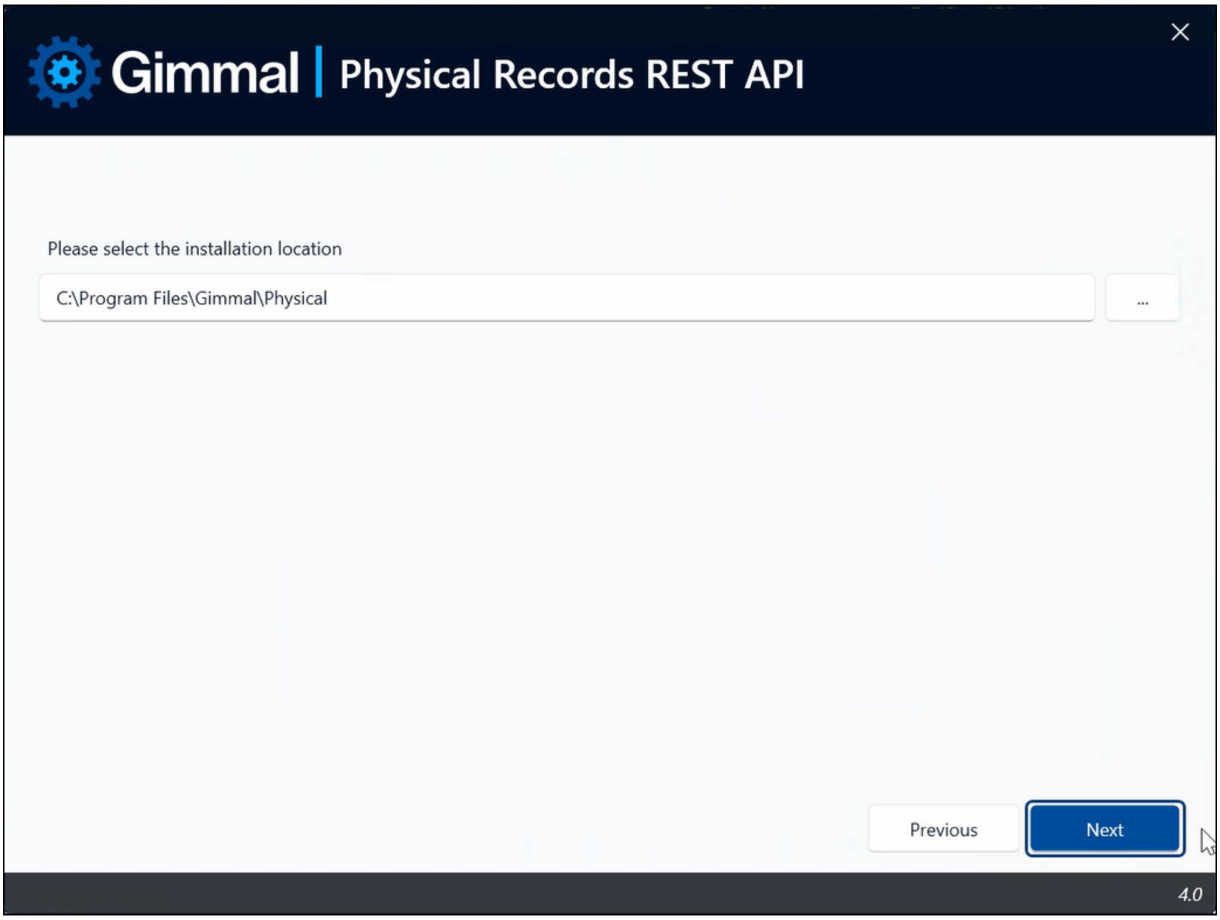
In certain localized (on-prem) installations, when selecting the option to automatically create a database during installation, the installer may fail with an error similar to:

ExecuteNonQuery failed for Database 'DIS_DEV_Dummy'. ---> Microsoft.SqlServer.Management.Common.ExecutionFailureException: An exception occurred while executing a Transact-SQL statement or batch. --->

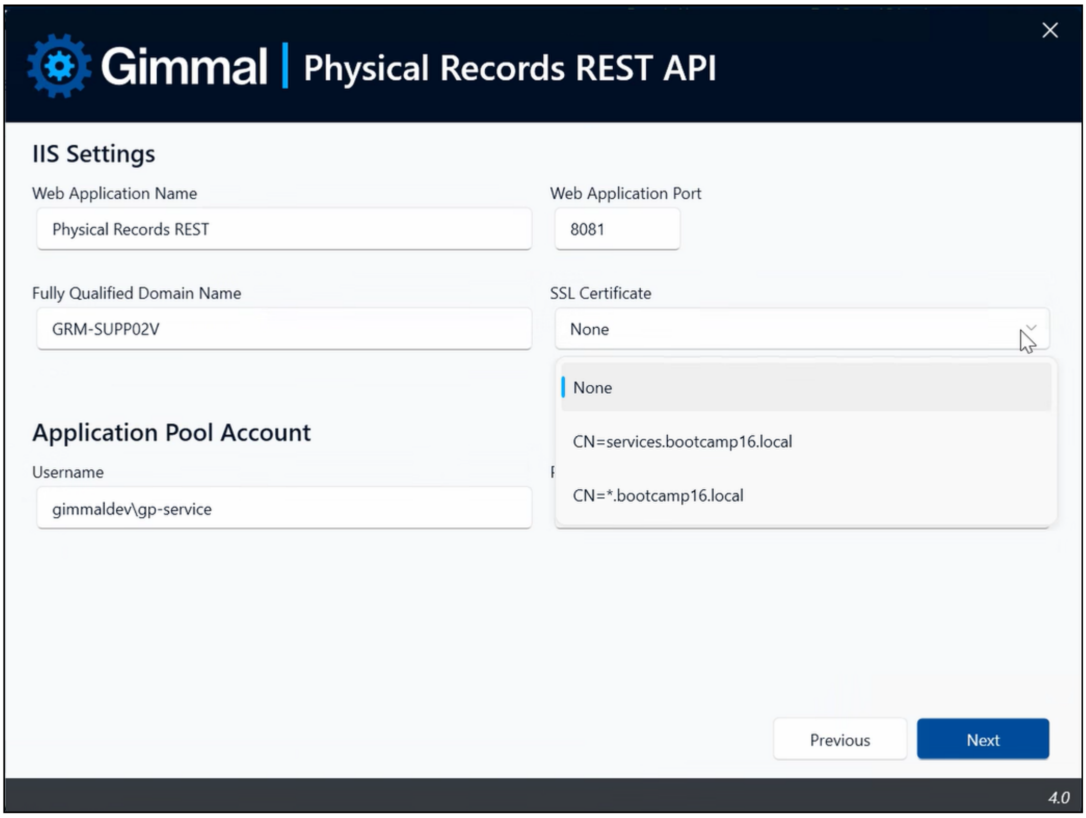
The result will be that the database is either not created or initialized incorrectly. However, the application binaries themselves are installed correctly. For additional assistance, please contact your Gimmal Team member after completing the installation.

1.2.3.2 Physical Records REST API

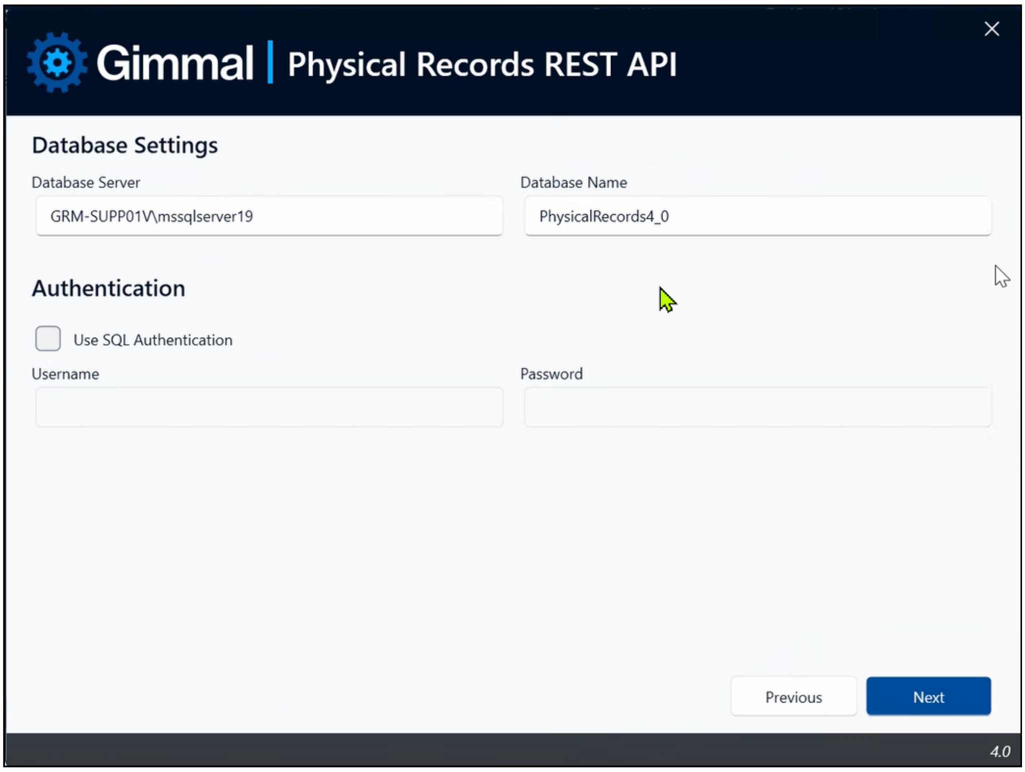
1. The Rest API Installer will first verify the Prerequisites. If they verify successfully, click ‘Next’. If any anomalies are detected, resolve them and then restart the process.



2. Choose the installation path and click ‘Next’
3. Configure IIS Settings
    a. Web Application Name the default is PhysicalRecords
    b. Web Application Port the default is 8081
       Note: Ensure this is a different port from that configured for the Physical Records Web in the steps above.
    c. Fully Qualified Domain Name Provide the FQDN for the current (application) server host
    d. SSL Certificate Choose from list of installed certificates (if available)
       Note:
        i. These settings can be configured manually after the installations, but it is more efficient to set them now.
        ii. To avoid issues the selected certificate *must* be in the Trusted Certificate Store.
4. Set *Application Pool Account*
    a. Username for a domain account. Note: use domain\username format
    b. Password for domain account
       Note: The Application Pool account requires Full Control to the application directory.



5. Click 'Next'
6. Configure Database Settings
    a. Database Server - The name of the database server which will host this Gimmal Physical database
    b. Database Name - the name of the database. The default name is *PhysicalRecords*
    c. Authentication (Database)
       Note: If these values are not set, then Windows Authentication will be used to connect to the database. In this case, the logged in user must have the appropriate permissions.
        i. Use SQL Authentication Check this option if you prefer to use SQL authentication. Enter the credentials listed below if this option is selected.



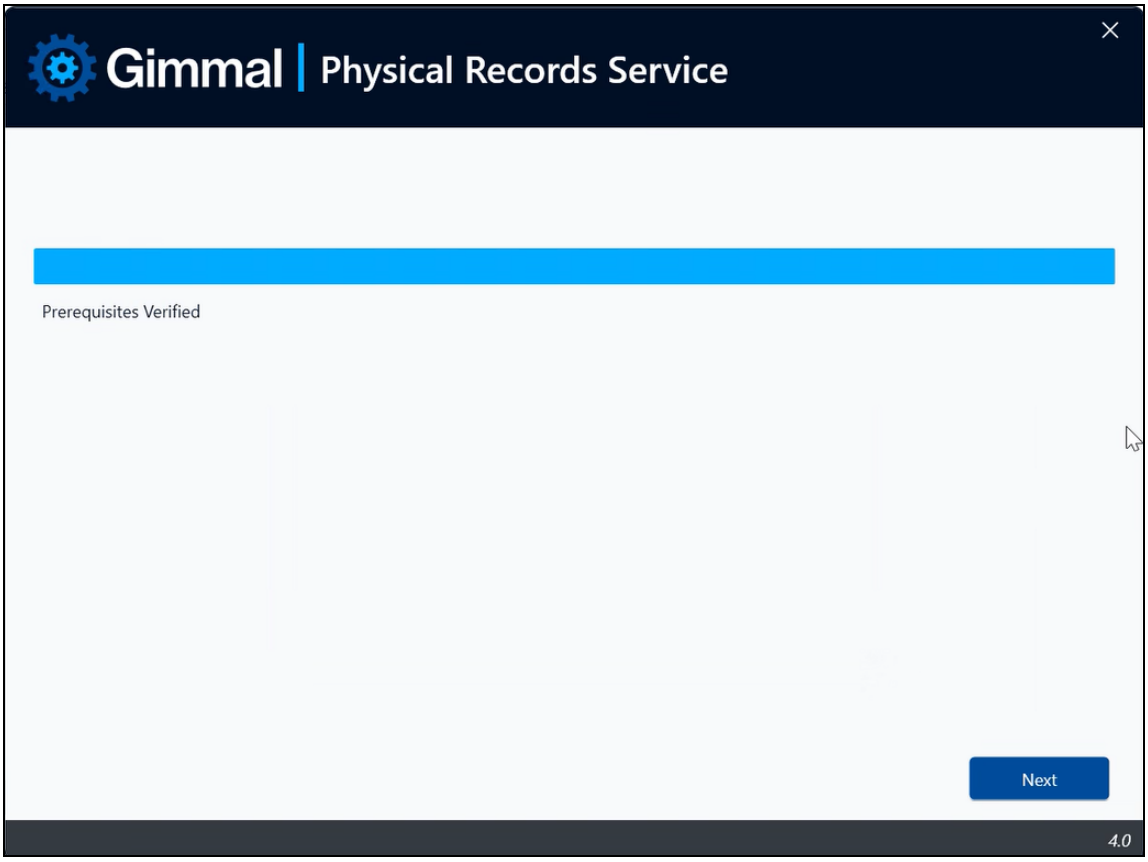
7. Click ‘Next’ to install the Physical Records Rest API.
8. The installer will verify all components have installed correctly. Click ‘Next’
9. Click ‘Finish’ to return to the main menu.

1.2.3.3 Physical Records Service

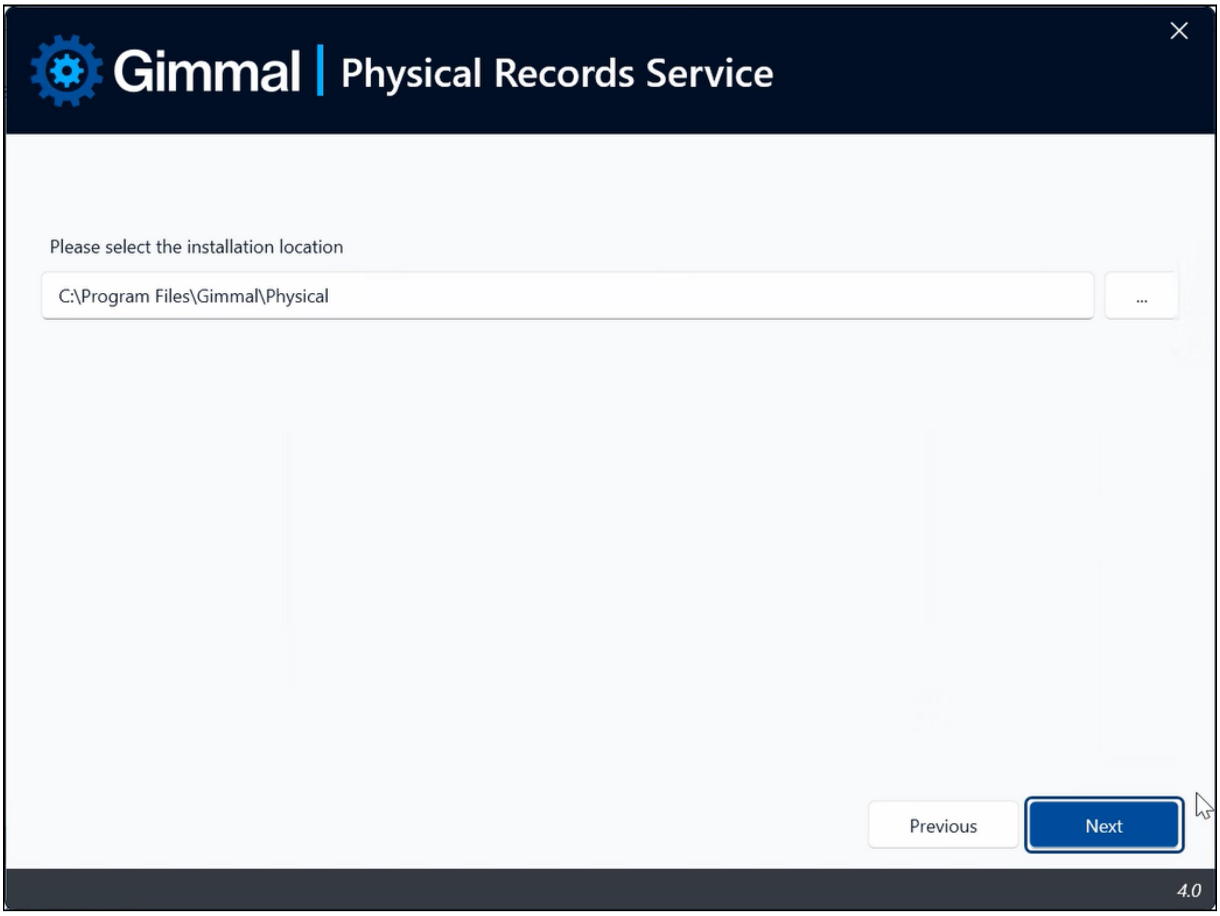
This component is used to coordinate job services.

Note: For optimal performance, Gimmal recommends installing the Physical Records Service on a machine separate from your web server. This machine must have access to the database server.

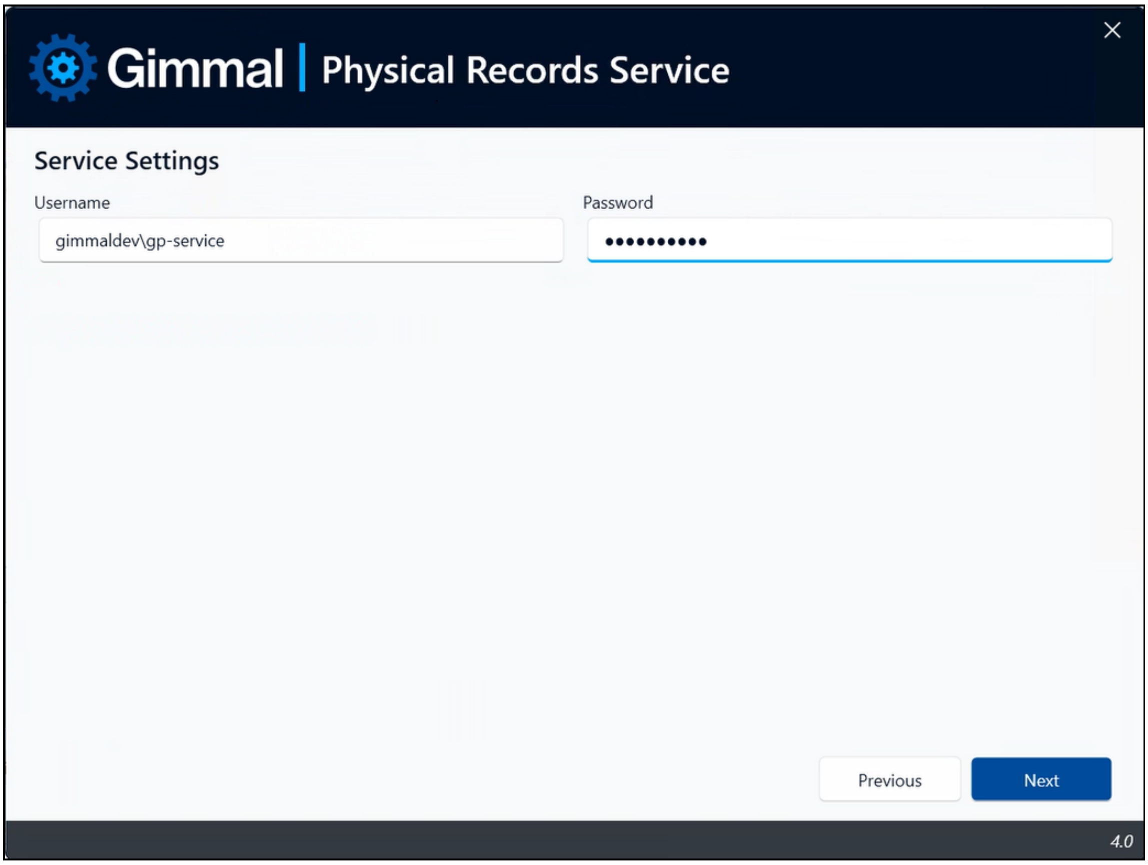
1. The Rest API Installer will first verify the Prerequisites. If they verify successfully, click ‘Next’. If any anomalies are detected, resolve them and then restart the process.



2. Choose the installation location and click 'Next'



3. Configure *Service Settings* by entering the Username and Password of a service account which will run the Physical Records Service. Click 'Next' when finished.



4. Configure Database Settings and Authentication to mimic those used in setting up the physical Records REST API
5. Click ‘Next’ to begin the setup and configuration of the Physical Records Service
6. Click ‘Next’ to install the Physical Records Service
7. The installer will verify all components have installed correctly. Click ‘Next’
8. Click ‘Finish’ to return to the main menu.

Once all three components have been installed, the application is functional and should be tested by opening a browser and navigating to the site.

1.2.4 Upgrade

If you have an existing installation of Gimmal Physical that needs to be upgraded, please contact Gimmal Support for assistance.

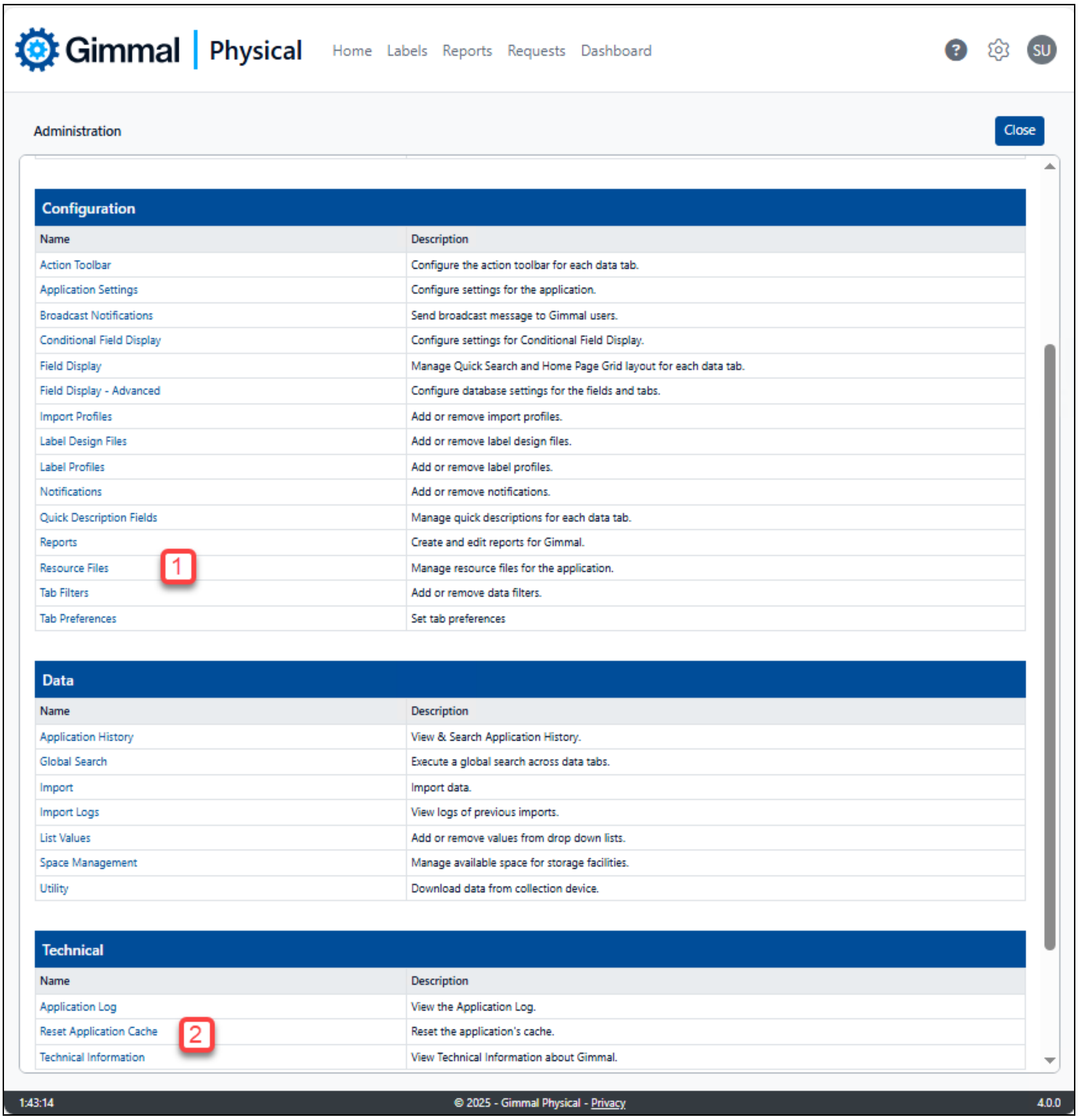
1.2.5 Post-Installation

After installing or upgrading the Gimmal Physical Application, there are several optional, but recommended, steps that reset cache and configuration so the recent updates will be shown correctly. These are performed inside the application.

1. Reset Application Cache -

   a. Navigate to *Admin* on the Top Level Menu
   b. Choose *Reset Application Cache* from the Technical section close to the bottom (2).
   c. Click 'OK' at the popup box to verify the reset.

2. Recreate Resource Files -
   a. Navigate to *Admin* on the Top Level Menu
   b. Choose *Resource Files* close to the bottom of the Configuration section (1).
   c. Click the *Create Resource Files* link from the Manage Resource Files page
   d. Click the 'Recreate English' button from the top right of screen. This recreates the default pages for the resource pages.



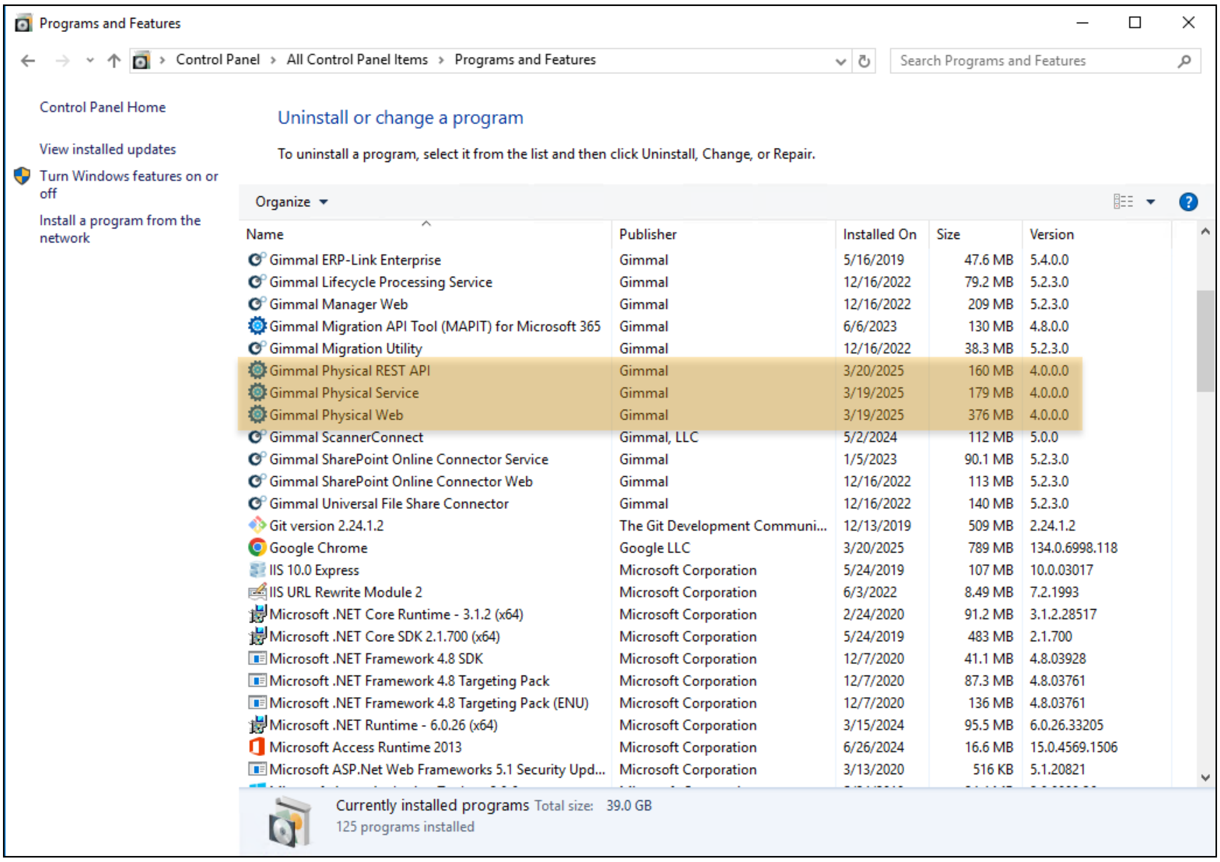
1.2.5.1 Troubleshooting

While the installer validates a number of prerequisites and required values, it is always possible for errors to occur. The installer will log any such errors in the Windows Event Viewer.

The Application Log found in *Admin | Application Settings* may also prove helpful.

1.2.6 Uninstalling

To Uninstall Gimmal Physical, please use the *Programs and Features* option in the Control Panel to uninstall each component. This will remove aspects of the application except the database.



Please contact Gimmal Support with any questions or concerns.

1.3 Quick Start Guides

Please use the tree view on the left or links below choose a guide.

- Quick Start Guide for Administrators (see page 26)
- Quick Start Guide for General Users (see page 29)

1.3.1 Quick Start Guide for Administrators

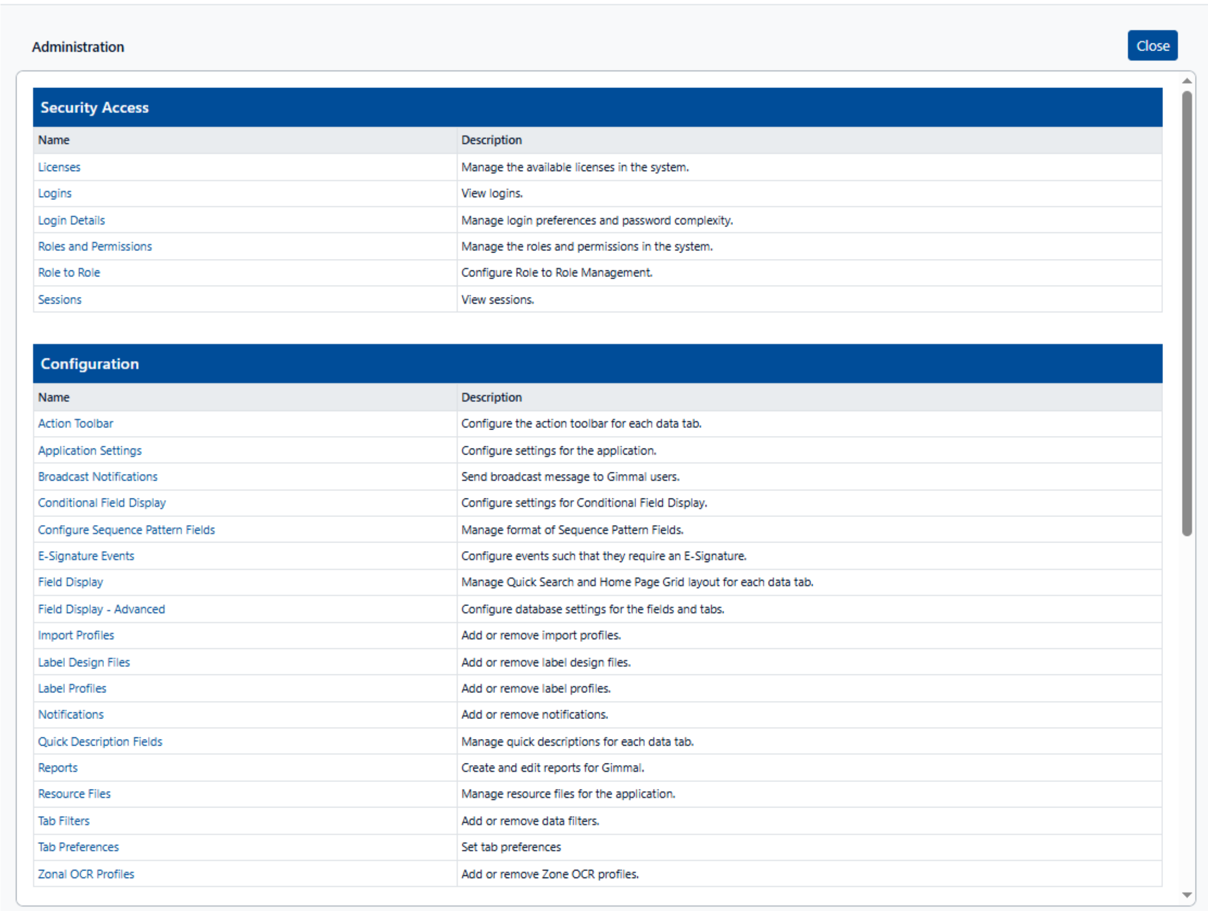
1.3.1.1 Administrator Tasks

There are a number of settings which are available for handling administration tasks in Gimmal Physical. With the correct permissions, administrator options are accessed by clicking the gear icon and choosing 'Admin'.

Please note: Some of the visible options (e.g. Integrations) may depend on the components which are licensed for your organizations.

The options are grouped into five sections. Each option is accessed by clicking on the relevant link.

- Security Access
- Configuration
- Data
- Technical
- Integrations



Administration

Close

Security Access

Name	Description
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.
Configure Sequence Pattern Fields	Manage format of Sequence Pattern Fields.
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.
Tab Preferences	Set tab preferences
Zonal OCR Profiles	Add or remove Zone OCR profiles.

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.

Integrations

Name	Description
Iron Mountain	Configuration options for connecting to Iron Mountain
O'Neil	Configuration options for connecting to O'Neil

1.3.1.2 Security Access Options

The most common options when setting up the application are found under the 'Security Access section':

1.3.1.2.1 Licenses

Helpful for viewing logged in users, this option is rarely used for managing new licenses.

1. To manage Licenses, click on the Licenses link under 'Security Access'.
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.

1.3.1.2.2 Logins

1. To view logins, click on the Logins link under 'Security Access'.
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.

1.3.1.2.3 Login Details

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

1.3.1.2.4 Roles and Permissions

1. To manage Roles and Permissions click on the Roles and Permissions link under 'Security Access'.
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.

1.3.1.2.5 Role to Role

1. To manage which roles can manage other roles click Role to Role under 'Security Access'.
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.

1.3.1.2.6 Sessions

1. To view sessions, click on the Sessions link.
2. Sessions of users can be deleted by clicking on the Delete Records link on the Session Tracking screen.

1.3.1.3 Documentation Options

By default, the *Help* button (?) found in the Navigation Ribbon will take users to the Gimmal Physical Documents Site[2]. However, if your organization has its own web-based documentation, Gimmal Physical will support linking your documentation to the default Help button. To do so,

1. Navigate to the Gear icon on the top of the Gimmal Physical home page
2. Select 'Admin'
3. Choose Application Settings under the Configuration section.
4. Copy the URL of your documentation into the 'Gimmal Online Help URL' option
5. Click 'Save' to update the Settings.

2. https://docs.gimmal.com/gp/

1.3.2 Quick Start Guide for General Users

General users of Gimmal Physical can use the following guide to quickly familiarize yourself with the application.

1.3.2.1 Gimmal Physical Overview

- User Interface Overview (see page 39)
- Data Creation (see page 56)
- Tutorials (see page 294)

1.3.2.2 Finding Items

1. Click on the desired Tab.
2. To use the quick search, enter a value for the field you would like to search by in the Quick Search and press the Enter key or click the Search button.
3. Desired results will be returned in the grid format.

Helpful Hint
Search Overview (see page 95)contains in-depth detail about additional Searching Options.

1.3.2.3 Requesting Items

1. Find the desired records as described above in Finding Items.
2. Click on the check box next to the desired item(s).
3. Click on the Request Delivery button in the Action Menu.
4. Click on the desired destination in the Recent Request Destinations grid or specify the desired destination on the resulting Request Items screen.
5. Click on the Request button on the Request page.
6. Click on the OK link in the resulting Request Results page.

Helpful Hint
Requesting Items (see page 76) contains in-depth details regarding options for requesting items.

1.4 User Guide

Please use the tree view on the left or links below choose the appropriate article of interest from the Gimmal Physical User Guide.

1.4.1 Basic Functionality

This section highlights the basic functionality of Gimmal Physical. Please click on the links to the left or the menu below for articles.

1.4.1.1 Related interactive tutorials

- Printing Labels[3]
- Reporting[4]
- Requesting[5]

3. https://gimmal.navattic.com/ql108di
4. https://gimmal.navattic.com/nu20au5
5. https://gimmal.navattic.com/gl10s6b

1.4.1.2 Notifications

1.4.1.2.1 Overview

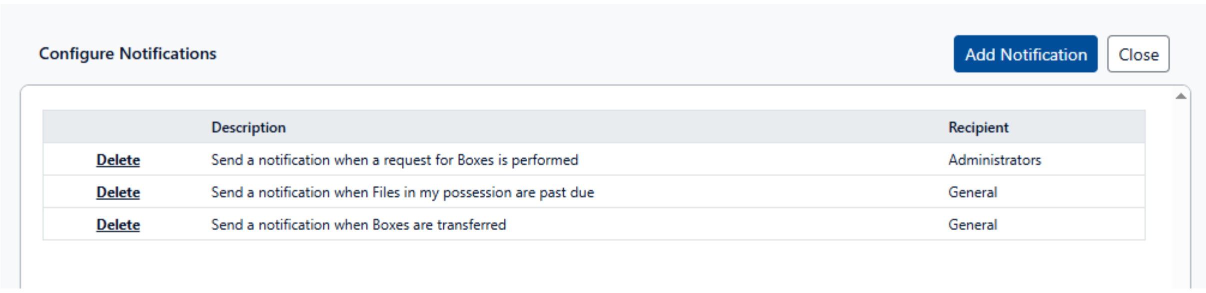
Gimmal Physical provides an email-based notification system for all of its users, alerting them of user-initiated activities that may require attention. Notifications can be configured by any user who has the permission to do so.

Each notification consists of an event that triggers the notification and the role the notification is sent to. Only the users assigned to the specified security role, and the security role's e-mail address (if populated), will receive the e-mail notification.

1.4.1.2.2 Configuring Notifications

Notifications are sent to the chosen role when a Notification Event is triggered. The first **Configure Notifications** page lists the currently configured notifications, who they will be sent to, and provides the ability to add new notifications or delete existing ones.

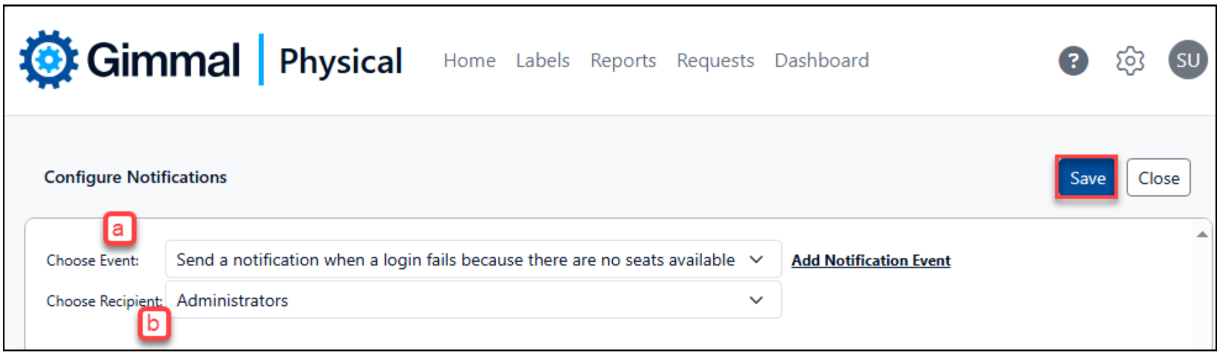
To open the **Configure Notifications** page, browse to the Admin page via the gear icon, navigate to the **Configuration** section, and click **Notifications.**



Currently, notifications cannot be edited from the 'Configure Notification' screen; only new ones can be added. To change a recipient or event of a current notification, it must first be deleted.

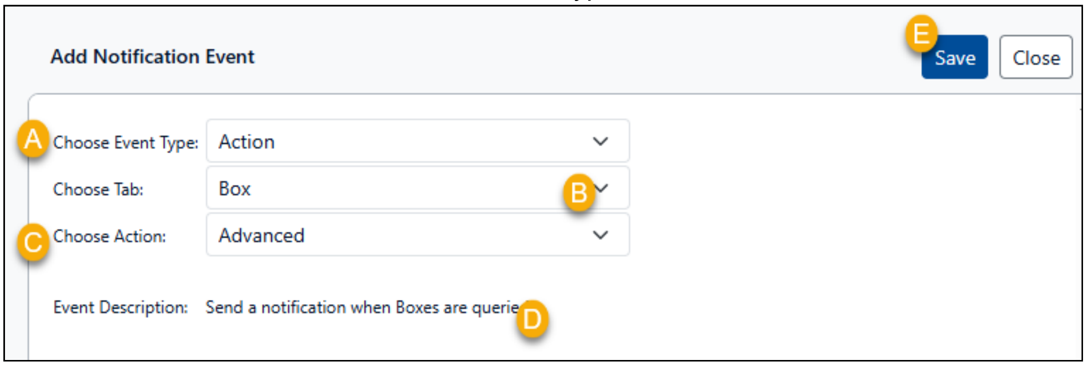
1.4.1.2.2.1 Configuring New Notifications

From the main **Configure Notifications** page, click the **Add Notification** button. This opens a new page (also called 'Configure Notifications'), with several options.



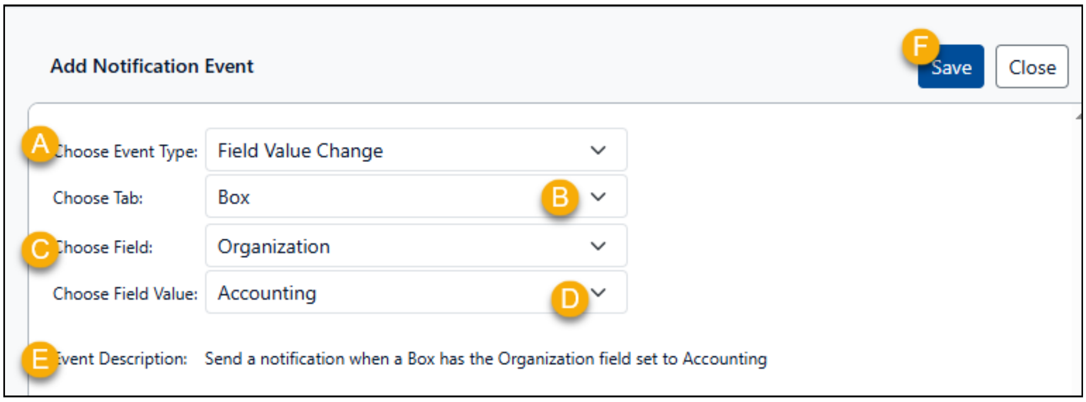
3 Configuring a new notification

1. The *Choose Event* drop-down list (a) contains a list of events that will trigger the notification. If the required event is not represented on the list, click the 'Add Notification Event' link to add another event to the list from the Add Notification Event form (see #3 below)
2. The *Choose Recipient* drop-down list (b) is pre-populated with available Roles enabled within the application.
3. The *Add Notification Event* link opens the Add Notification Event form, which creates a new event to populate the Choose Event drop-down list (See #1 above). There are two types of Events to choose from: Actions and Field Value Changes:
   a. To create a new notification event for an Event Type of ***Actions***:



      i. Select an option from the Choose Event Type drop-down list (A) and choose **Actions**.
      ii. Choose the item type from the Choose Tab drop-down list (B). This control lists the tabs for the item types that are available for notifications for the selected event type.
      iii. Choose the type of action from the Choose Action drop-down list (C). This control lists the actions that are available for notifications for the tab selected in the Choose Tab control.
      iv. The Event Description (D) will update depending on the choices selected.
      v. Click the *Save* button (E) to return to the previous screen. The new notification event will now show in the list.

   b. To create a new notification event for ***Field Value Changes***:



i. Select an option from the Choose Event Type drop-down list (A) and choose **Field Value Changes**.
ii. Choose an item type from the Choose Tab drop-down list (B). This control lists the tabs for the item types that are available for notifications for the selected event type.
iii. Choose a field from the Choose Field drop-down list (C). This control lists the fields that are available for notifications from the tab selected in the Choose Tab drop-down list.
iv. Choose a field value from the Choose Field Value drop-down list (C). This control lists the field values that are available for notifications based on the field selected in the Choose Field drop-down list. If this value is updated to the selected value, the notification will be triggered.
v. The Event Description (E) will update depending on the choices selected.
vi. Click the *Save* button (F) to return to the previous screen. The new notification event will now show in the list.

4. Click the *Save* button once the new notification details have been completed.

> While most notifications are sent to the role chosen when adding new notification entries, there is an exception for Request related Action event types. If any of these options are chosen (e.g., Request Approved, Request Fulfilled, etc.), the notification will be sent to the user.

1.4.1.2.2.2 Body of Notification Email

While the default message text for a notification is not configurable, there will be sufficient detail to identify the action, item, and user. In the example below, the item(box), action (created), and user (James Doe) are noted in the body of the notification email.

> *This message is to notify you that the following Box, 'box: BOOOO5325 (Records Center)', was created by User: James Doe*

1.4.1.2.3 Email Configuration Notes

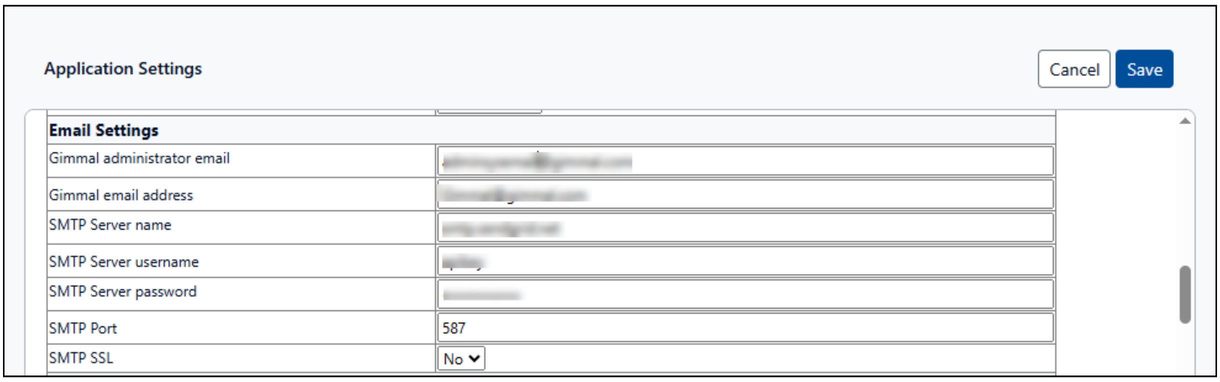
1.4.1.2.3.1 Notification Email Settings

Email addresses must be set for the role or user who will receive notifications. This can be set

- As a Role Preference for role-level emails
- If no email is set for a given role, all users in that role will receive email at the address listed in their user record.

1.4.1.2.3.2 System Email Settings

As with any email sent from the Gimmal System, notifications are dependent on the correct Email Settings entered in the Application Settings found in the Configuration section of the Admin settings (accessible via the gear icon from the main screen). Customers deployed to the Gimmal Cloud will have these email options preset, but on-premises deployments will need to enter the correct configuration for their organization.



1.4.1.2.4 Creating Notification Events

1.4.1.2.4.1 Add Notification Event

If the event for your notification does not appear in the **Choose Event** drop-down list, click **Add Notification Event** to display the Add Notification Event page.

4 Adding a new notification event

There are two choices available in the **Choose Event Type** drop-down, selecting either one affects the remaining choices on the screen.

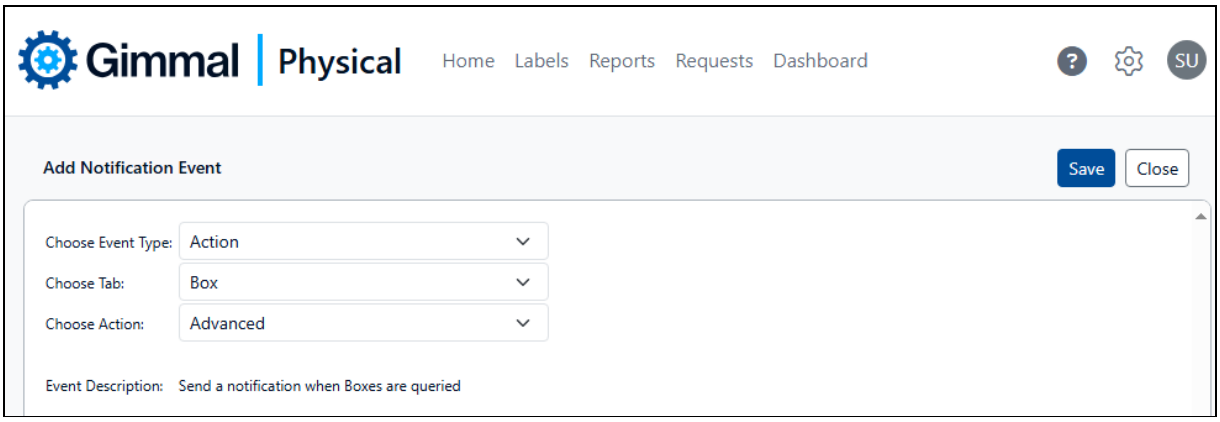
Action - The notification event is triggered when something happens to an item.

> The actions available to choose from depend on the tab you select in the **Choose Tab** drop-down. For example, **Request Performed** is available for the Boxes tab, but not for Records Schedule, since Boxes can be requested but Records Schedules cannot.

Field Value Change - Notification event is triggered when a list field is changed to a designated value.

> The fields and field values available to choose from depend on the tab you select in the **Choose Tab** drop-down. If you select a simple list (like Box Size for the Boxes tab), the values are just the choices available in that list field. If you select a list field that references another tab (like the Organization or Records Schedule fields for the Boxes tab), the values available are the Quick Descriptions.

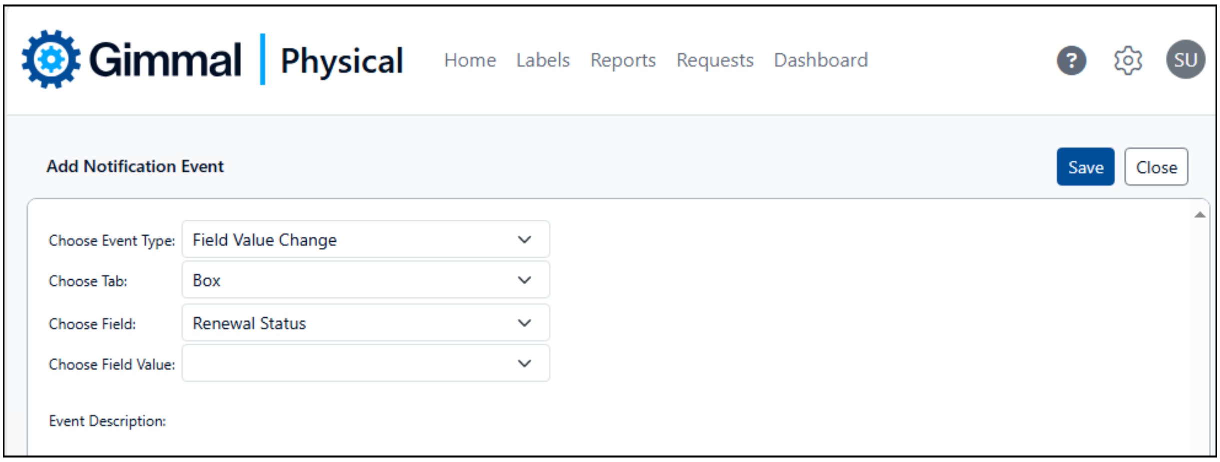
Create an Action Event



5 Action options

- Select **Action** in the **Choose Event Type** drop-down.
- Select the item type this notification event is for in the **Choose Tab** drop-down.
- Select the specific action for this notification event in the **Choose Action** drop-down.
- An **Event Description** is automatically updated based on your selections.
- Click **Save** after completing your choices to return to the **Configure Notifications** page.

Create a Field Value Change Event



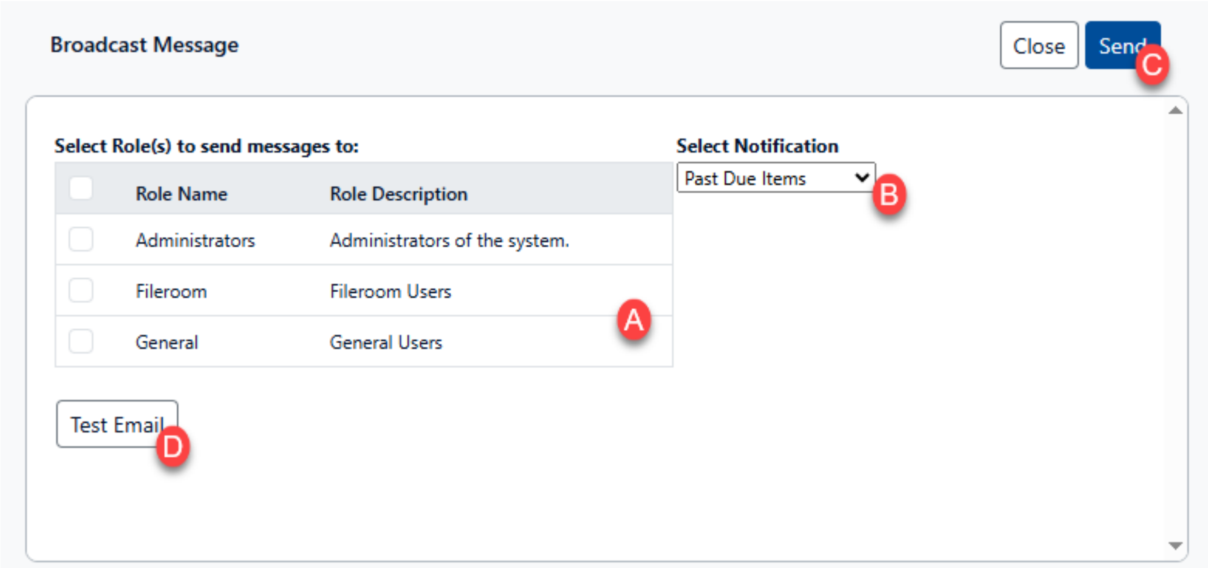
6 Field Value Change options

- Select **Field Value Change** in the **Choose Event Type** drop-down. The **Choose Action** drop-down will be replaced with **Choose Field** and **Choose Field Value** (it may take a few seconds for this to happen).
- Select the item type this notification event is for in the **Choose Tab** drop-down.
- The **Choose Field** drop-down includes the list fields available on the Tab selected in the previous step.
- Select the desired value in the **Choose Field Value** drop-down choices depend on the selection made for Choose Field. A notification based on this notification event is triggered when a user changes the indicated field to the selected value. See the note below for more information on the fields and values.
- Click **Save** after completing your choices to return to the **Configure Notifications** (see page 32) page.

> Please note: This type of notification only works on the update and not on the creation of new data.

1.4.1.2.5 Broadcast Notifications

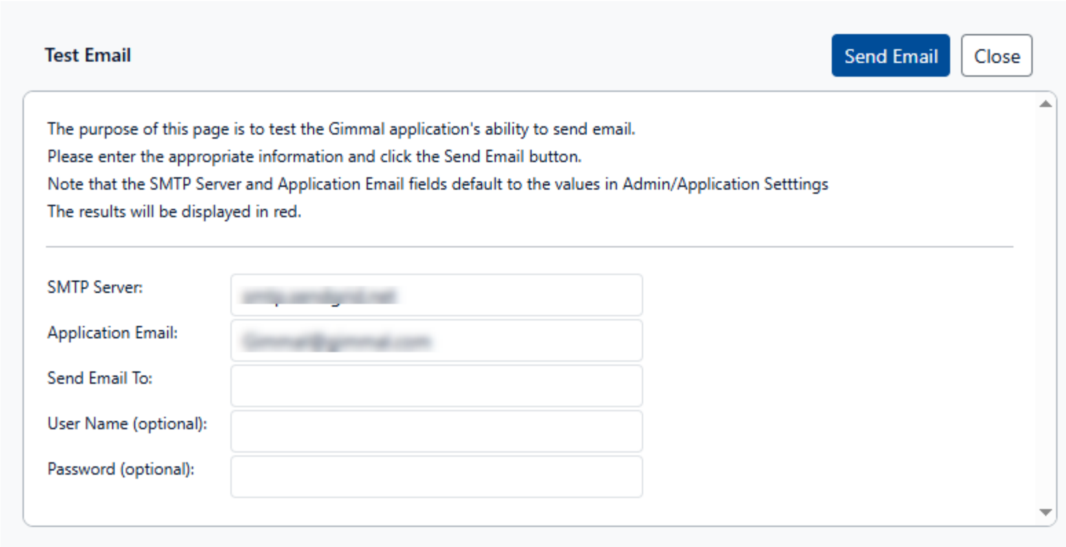
Broadcast Notifications enables the Gimmal Physical administrator to broadcast a specific email notification to one or more groups of Gimmal Physical users.



Follow these steps to broadcast a notification:

1. To open the **Broadcast Message** page, browse to the Admin page via the gear icon, navigate to the **Configuration** section, and click **Broadcast Notifications.**
2. Select one or more roles or users to receive the message (A).
3. From the drop-down list, select one of the preset notifications (B)
    a. ***Past Due Items*** will send an email to all users who have items past their due date as configured in the Preferences.
    b. ***Over Max Items Out*** will send an email to all users who have items out past the maximum limit as configured in the Preferences.
    c. ***General Message*** will send a message to all users of the system. Fields for the custom email subject and body will appear once this option is selected.
4. Click the Send button to send the message (C).

The **Test Email** button (D) can be used to send a sample email to verify that the system is working. The Server and application email will be pre-populated from the email configuration settings. Simply enter the email address and click the 'Send Email' button to validate the system.



1.4.1.3 User Interface Overview

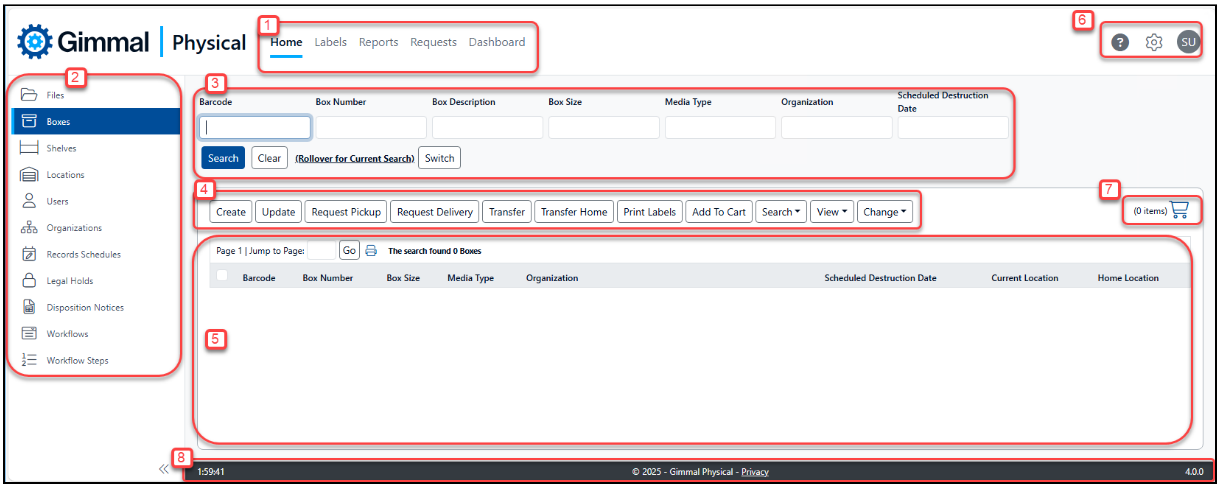
This topic has an interactive tutorial. To view this tutorial, click here[6].

> **Reminder**
> The actual field, tab, and action button names can be configured per organization and may vary from those shown in the examples.

Gimmal Physical is a highly configurable application that helps organizations of all sizes manage physical records to their specifications. Therefore, the screenshots and interface examples used throughout this guide may differ from the implementation used at your organization. However, the basic elements described below should be represented within your deployment.

6. https://gimmal.navattic.com/qfa07yg

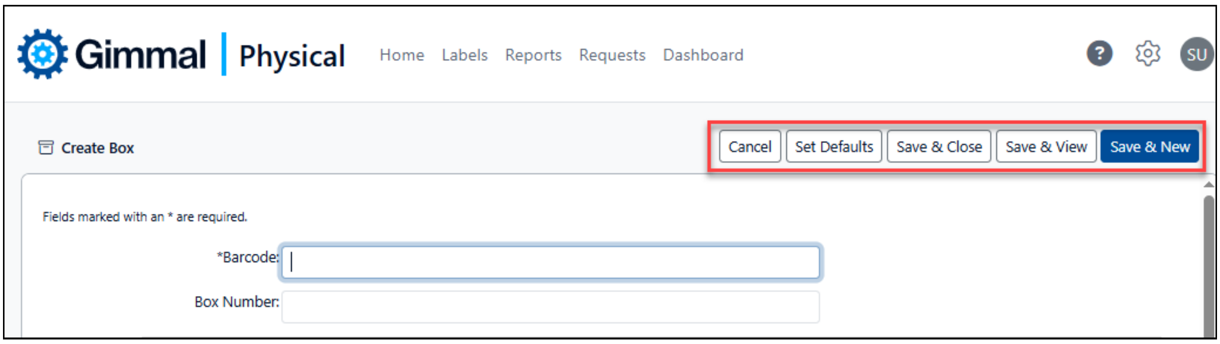
1.4.1.3.1 Default Interface



1. **Navigation Ribbon** – Provides access to the various indicated functions. Also called 'Navigation Menu or Application Ribbon'.
2. **Tabs Panel** – Collapsible panel for accessing the different item types (individually called a Tab or Data Tab) being tracked, both logical and physical. Also referred to as the Left, or Side, Navigation panel or pane.
3. **Quick Search** – Frequently used fields for querying records within the selected tab.
4. **Action Bar** – Configurable actions available, Preferences, and Admin configuration pages.
5. **Home Page Grid** – Displays queried results and allows navigation and selection of items
6. **Options Panel** – Offers links to
    a. **Help** - By default, this link displays Help information available on the Gimmal website, but it can be changed to a company-managed site listing Help content specific to your organization.
    b. **Gear** - Contains a menu with settings-related options:
        i. Preferences - Manages options affecting application display and behavior, and governing broader application functionality as well as those specific to each of the tabs. This is available to set on a user level or, with appropriate permissions, the application level.
        ii. Admin - Provides access to various administration settings for configuration and security-related options.
        iii. Print - Opens the browser print options for the current page
    c. **User** account with logout actions
7. **Shopping Cart** - Used to aggregate multiple items for Pickup and Delivery requests.
8. **Information Ribbon** - Shows details such as session clock and application version.

1.4.1.3.2 Standard Buttons

Data Creation or Update pages for the vast majority of item types have many useful buttons found at the top of the screen. Using 'Create Box' as an example:

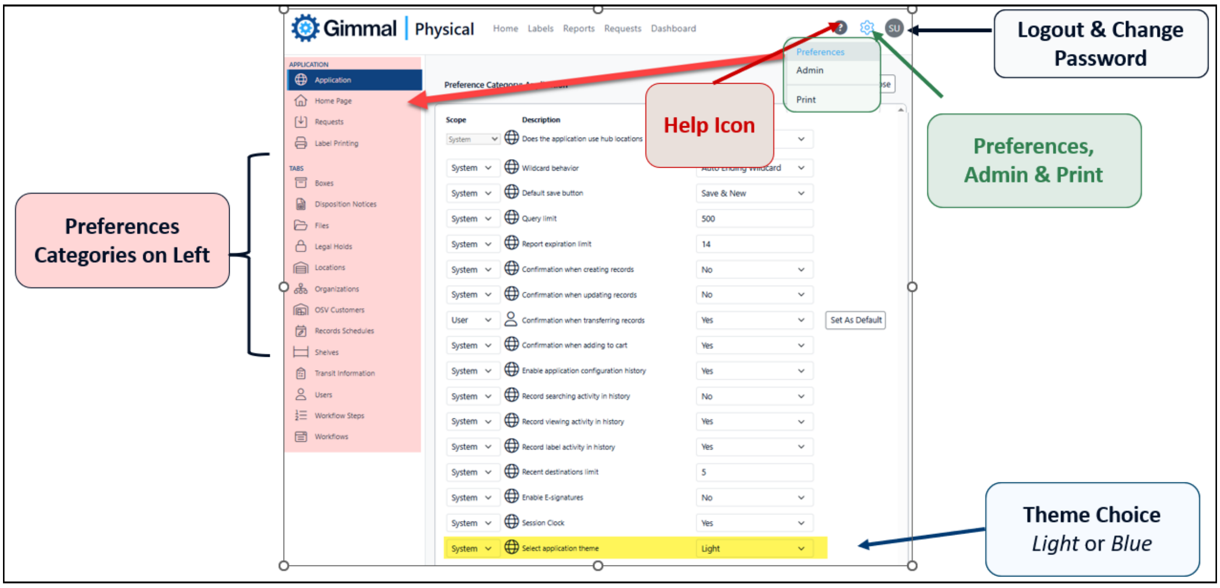


- **Cancel** closes the form without saving any changes.
- **Set Defaults** saves the currently entered values as defaults for any new record of the same type.
- **Save & Close** will save all fields and close the form, returning to the home page.
- **Save & View** will save all fields and go to the View page for the item.
- **Save & New** will save all fields for this item and remain on the page to create a new item.

1.4.1.3.3 Interface Options

Some interface options can be set using the gear icon to set Preferences. In the Application tab, the choice of Light or Blue theme can change the look of the application on a user or system level (depending on permissions).

> This guide uses the 'Light' theme for all screen captures.



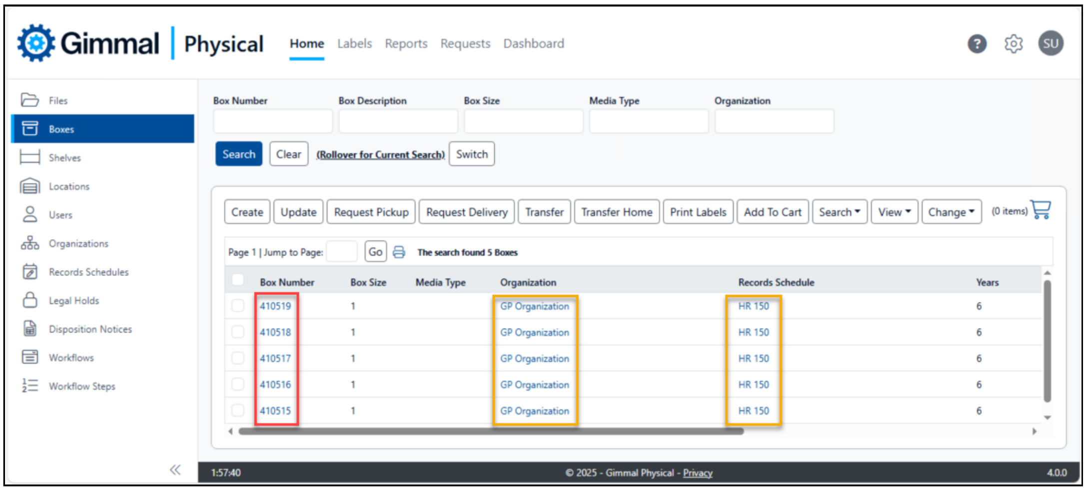
1.4.1.3.4 Helpful Hints

- When creating or updating data entry pages, fields with asterisks (*) are required.
- Administrators have a large number of options for controlling field display, captions, and order. See the Admin | Field Display or Admin | Advanced Field Display pages to view and alter options.

1.4.1.3.5 Viewing Records

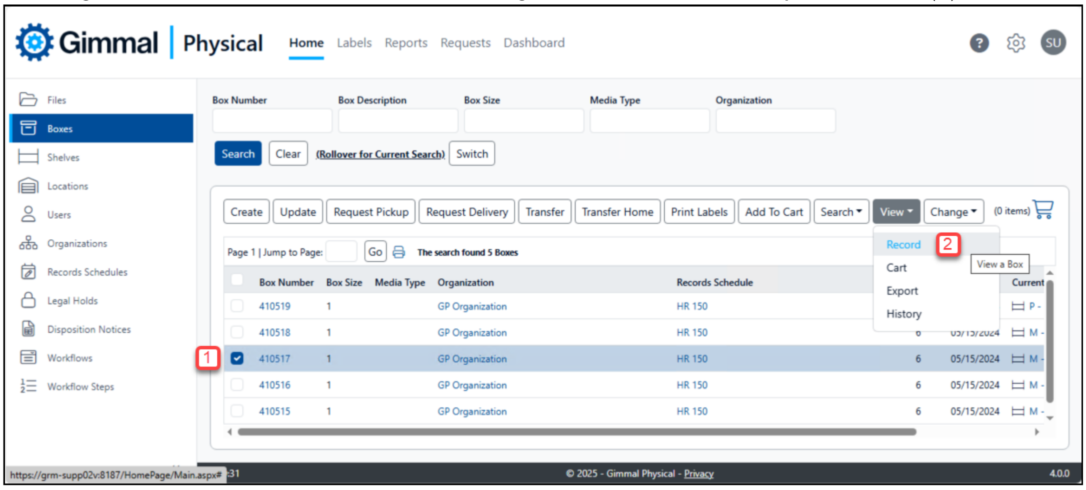
To view an item in Gimmal Physical

1. Click on the item type tab of the items you are interested in viewing. For example, if you want to view Boxes, click on the Boxes tab.
2. Search for specific items using any of the search options.
3. Select the item to be viewed by either:
    a. Clicking on the first column of desired item, displayed as a hyperlink. This will take you to the Item View page for the selected record.

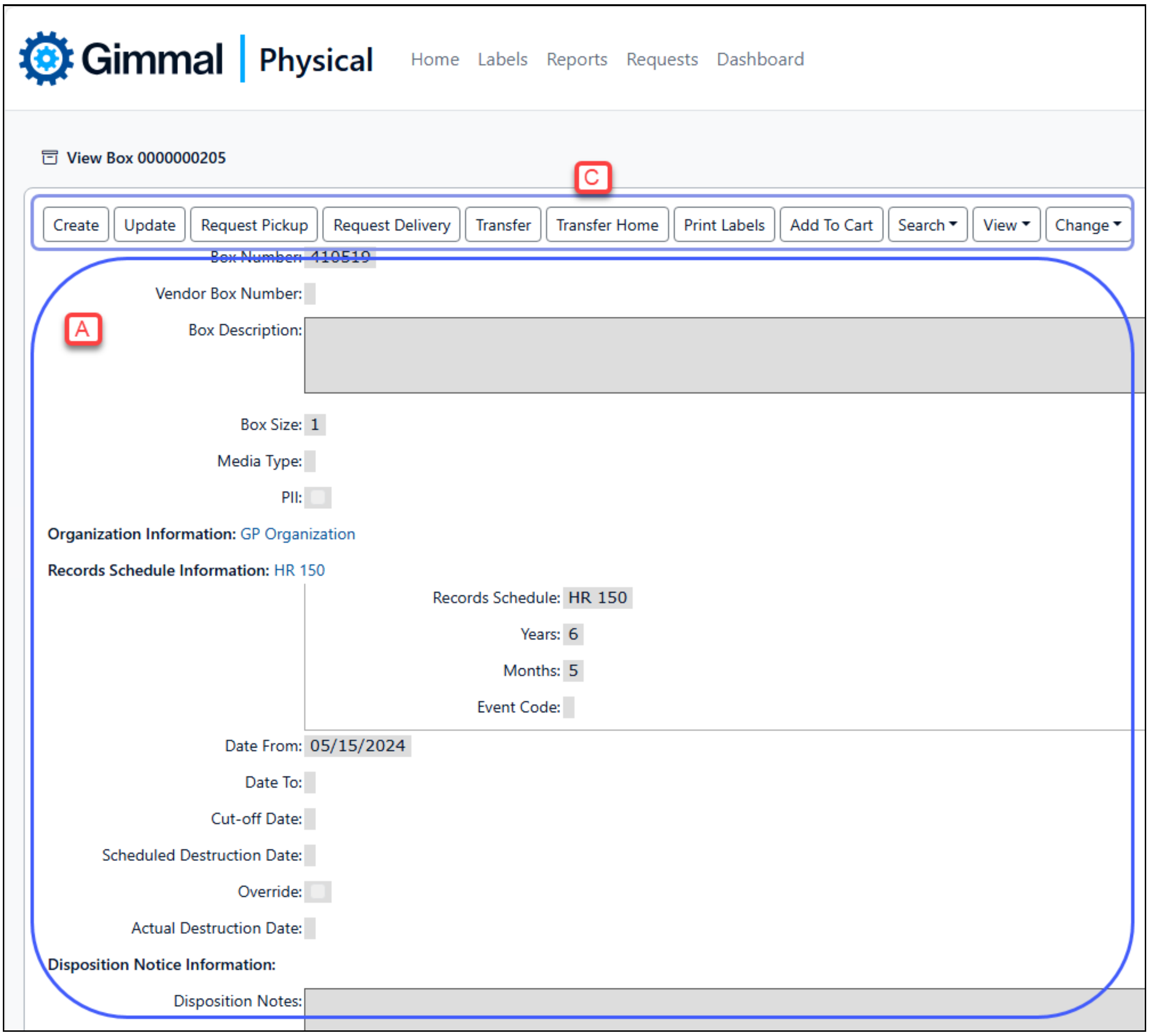


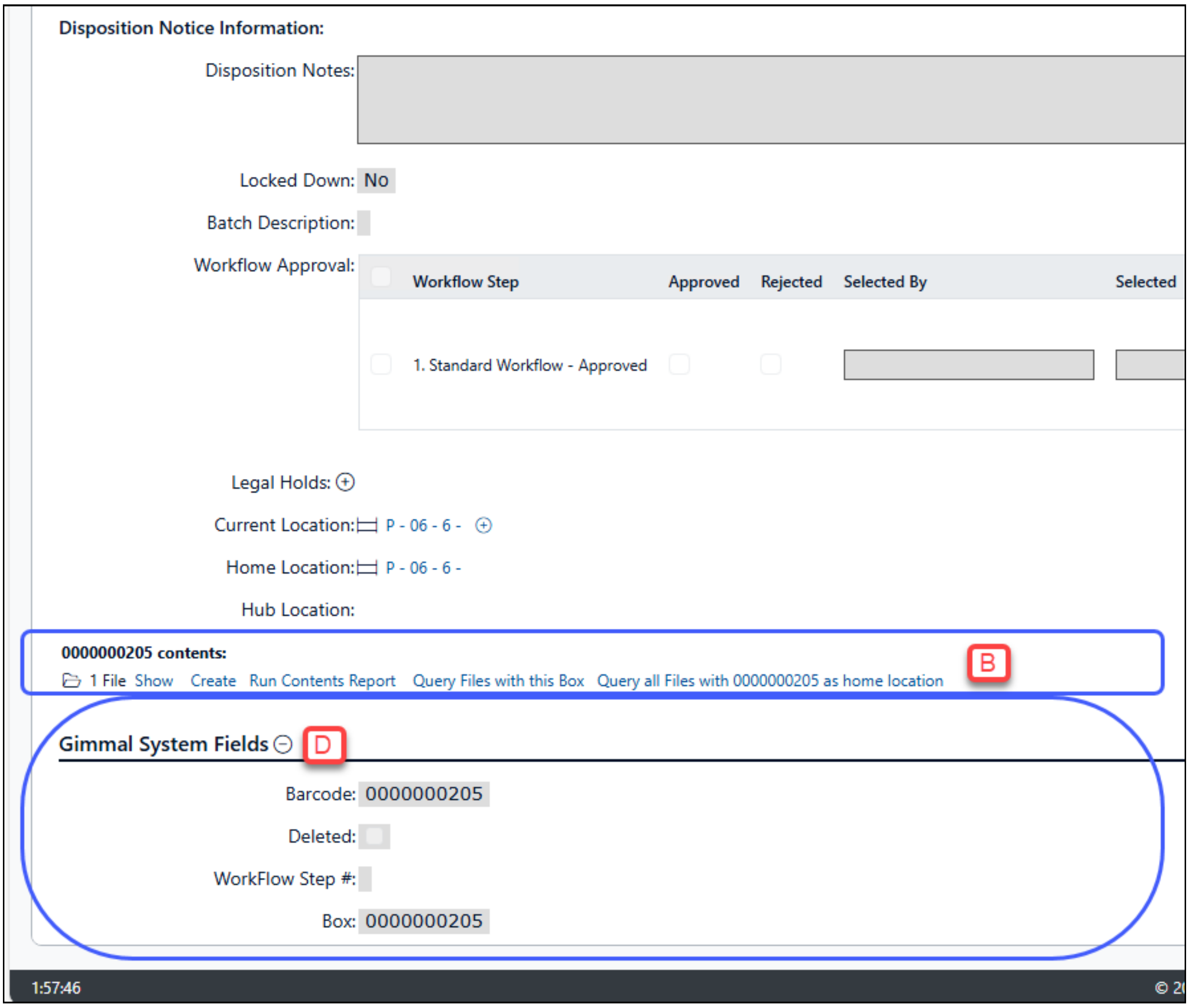
Note: Clicking on any other link will take you to the associated record of the type listed in the referenced column. For example, clicking on a hyperlink in the Organization column will take you to the Organization record for the selected item - in this example 'Accountants'.

b. Checking the box next to an item to select the record in the home page grid (1) and then clicking the View action button and selecting 'Record' from the drop down box (2).



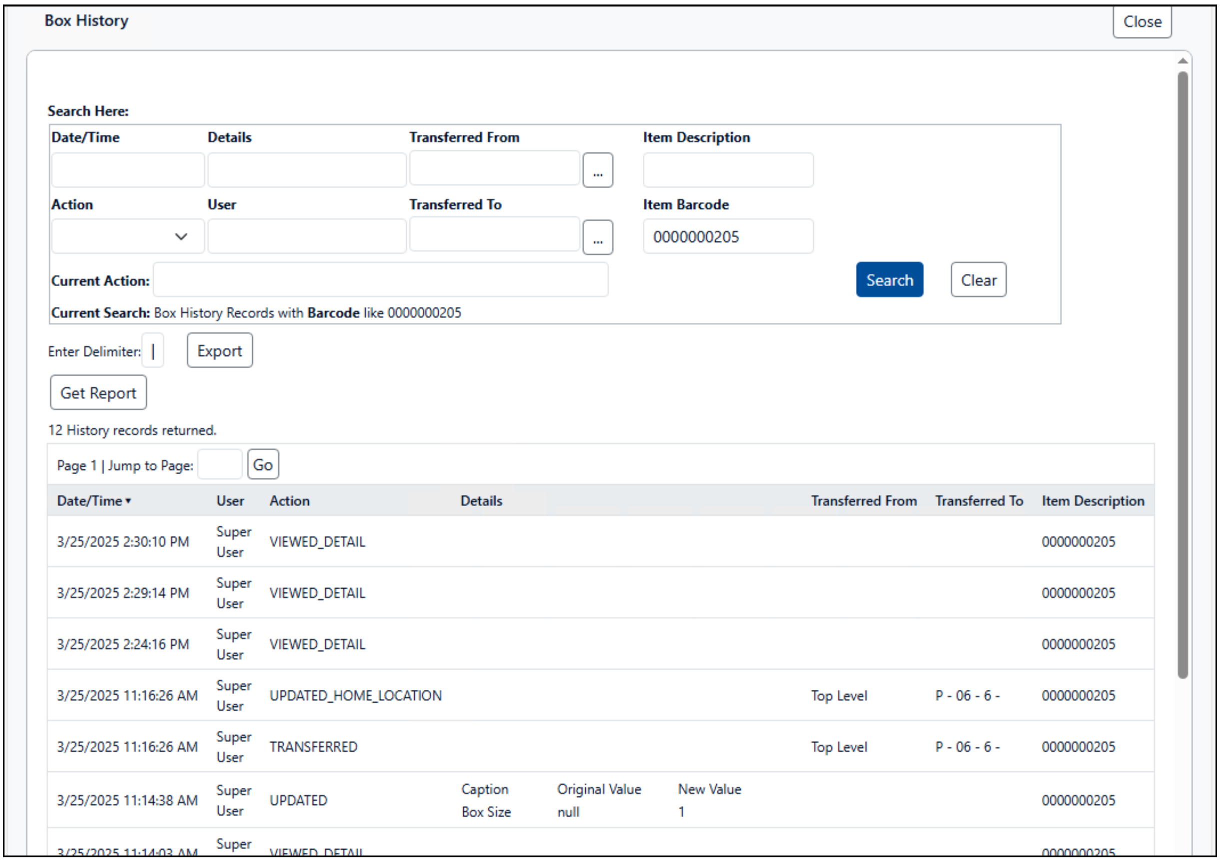
4. On the View page for the selected item, you can:
   a. View details relevant to this item type
   b. If applicable, see the contents of a container item and access actions that can be performed with those contents via links.
   c. Given the proper permissions, you can access various action buttons to work further with this item.
   d. View (expandable) system generated information


Gimmal | Physical
Home
Labels
Reports
Requests
Dashboard
View Box 0000000205
C
Create
Update
Request Pickup
Request Delivery
Transfer
Transfer Home
Print Labels
Add To Cart
Search
View
Change
Box Number: 410519
Vendor Box Number:
A
Box Description:
Box Size: 1
Media Type:
PII:
Organization Information: GP Organization
Records Schedule Information: HR 150
Records Schedule: HR 150
Years: 6
Months: 5
Event Code:
Date From: 05/15/2024
Date To:
Cut-off Date:
Scheduled Destruction Date:
Override:
Actual Destruction Date:
Disposition Notice Information:
Disposition Notes:



1.4.1.3.5.1 Item History

Gimmal Physical keeps a complete history of actions performed on items managed in the application.



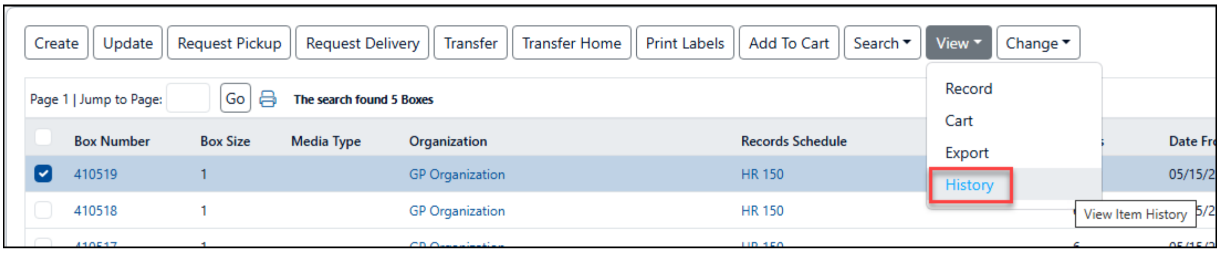
7 Box item history

With Gimmal Physical Item History you can see:

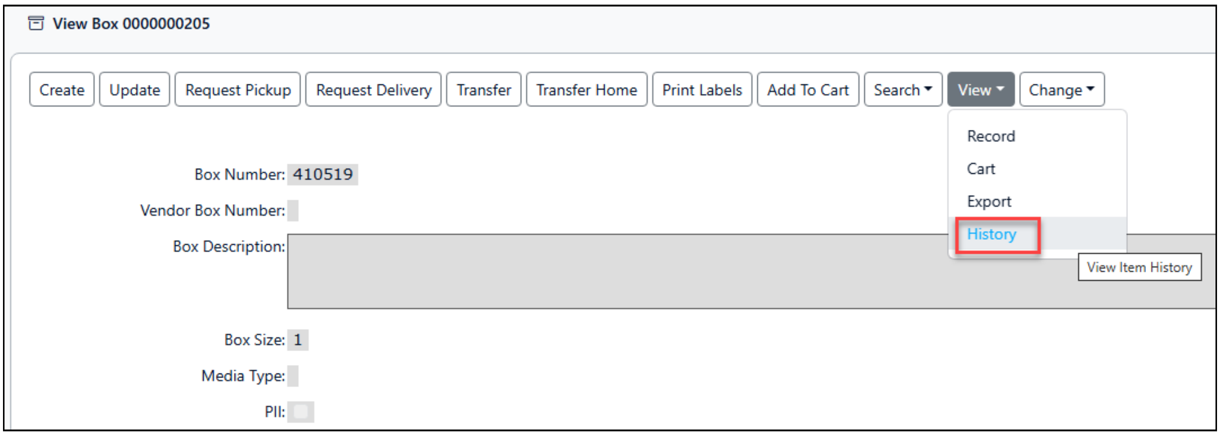
- The complete history of a record from creation to destruction.
- When a record was created and who created it.
- Who has viewed a particular record?
- When a record was requested and who requested it.
- When a record was transferred, who transferred it, and to whom it was transferred.
- Who has had a record in their possession and for how long.
- When a record was updated, who updated it, and the exact update(s) made.
- When the Home Location for a record was changed.
- When a record’s label was added to, or removed from, the Labels queue.
- When a record was deleted.

To view the history of a record in Gimmal Physical

1. Locate the desired record in your Home Page Grid using the search options.
2. Click the checkbox next to the desired record, then select History from the View drop-down Action Button.
   Note: you can also view the properties of the Box, then click History from the View drop-down button.

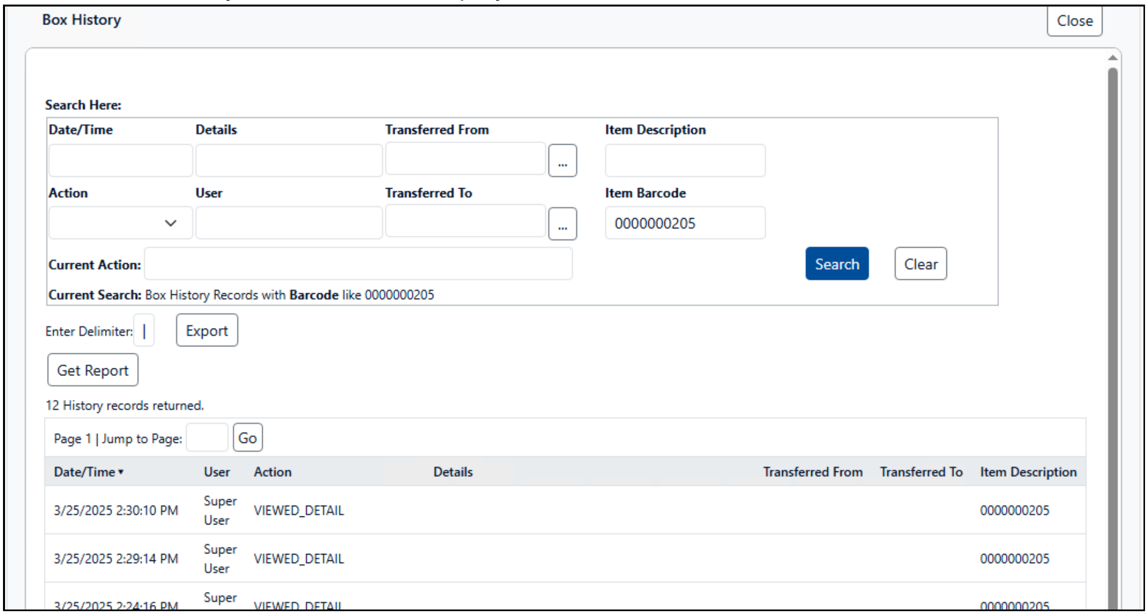


8 Access History from the Home Page Grid



9 Access History from the properties page

3. The Detailed history for that item is displayed.

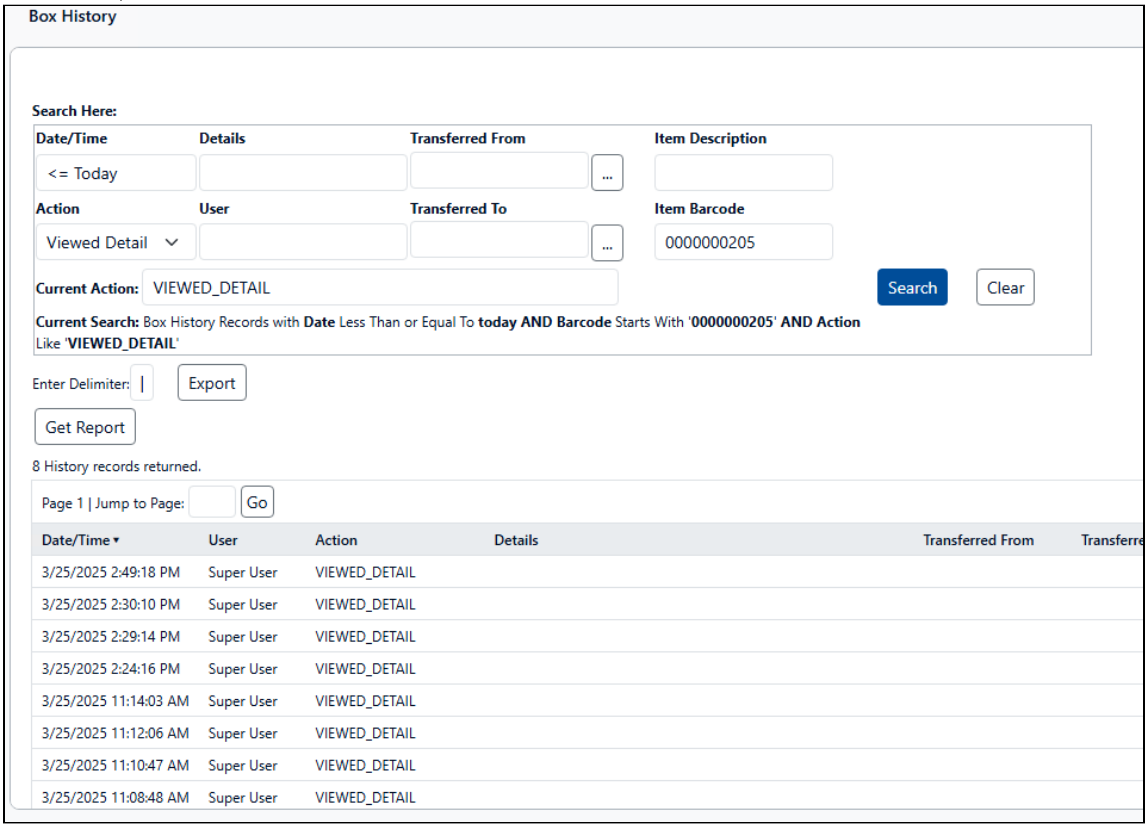


10 Detailed Box History

Search the Item History

The history of items in Gimmal Physical can be quite extensive. The application provides Search and Export functionality to help locate specific history entries.

- To execute a search, enter the value(s) for the field(s) you would like to find in the history, then click Search. You can use the same search operators you use when performing searches from the data tabs. A sample search to find updates to the box made on or before October 10, 2024, with an 'Updated' action, is shown below.

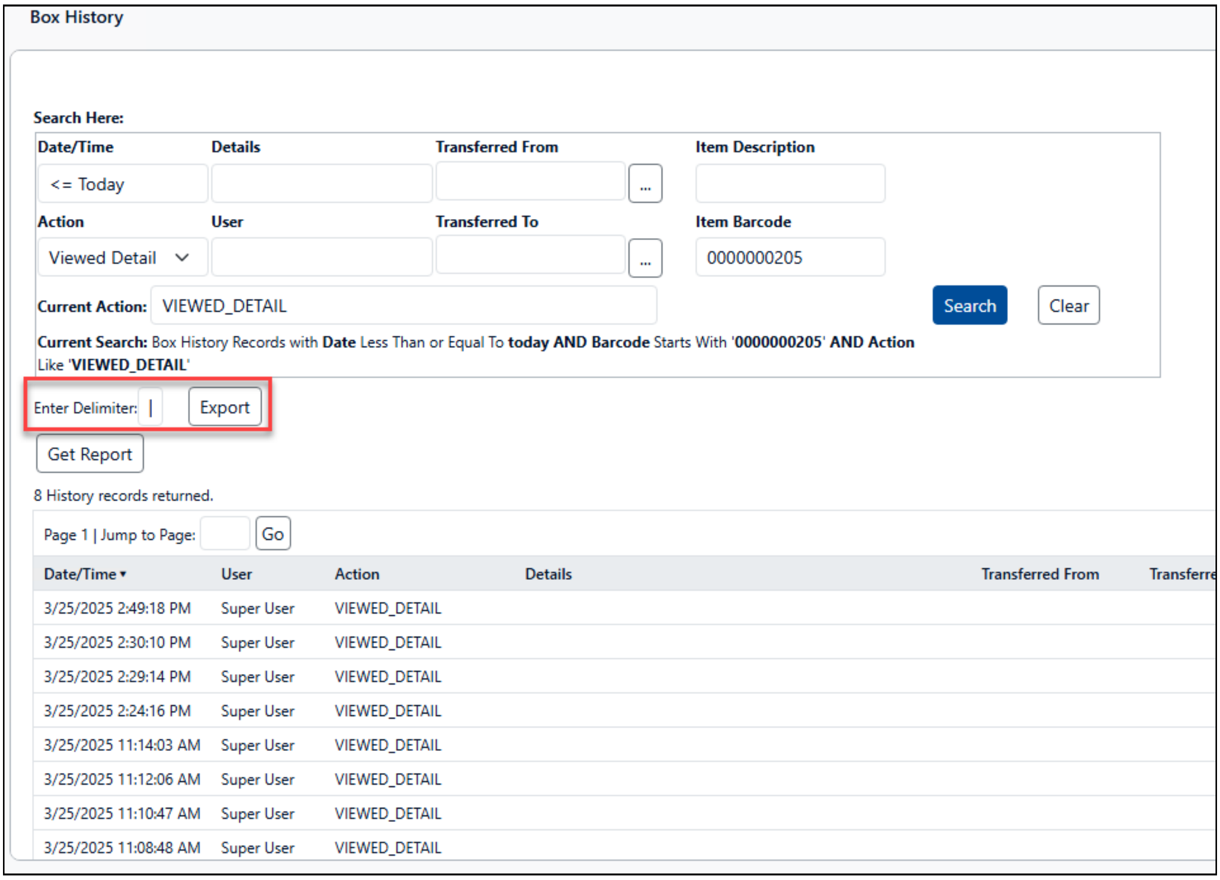


11 Sample box history search

Export History

You can export the entire item history or only the entries returned after executing a history search, as a CSV file. To export the history:

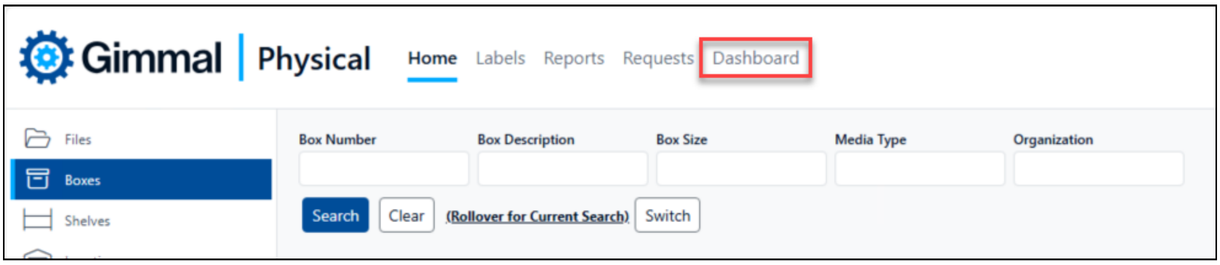
1. Select the appropriate field delimiter - it can be left as the default value or changed to another character.
2. Click the **Export** button.
3. The **View Exported File** link (see below) will be visible once the file is ready to export. Click the link to view and download the file.



1.4.1.3.6 Dashboard Navigation Window

The Gimmal Physical Dashboard is a view that centralizes a variety of data points and options of interest specific to the logged in user.

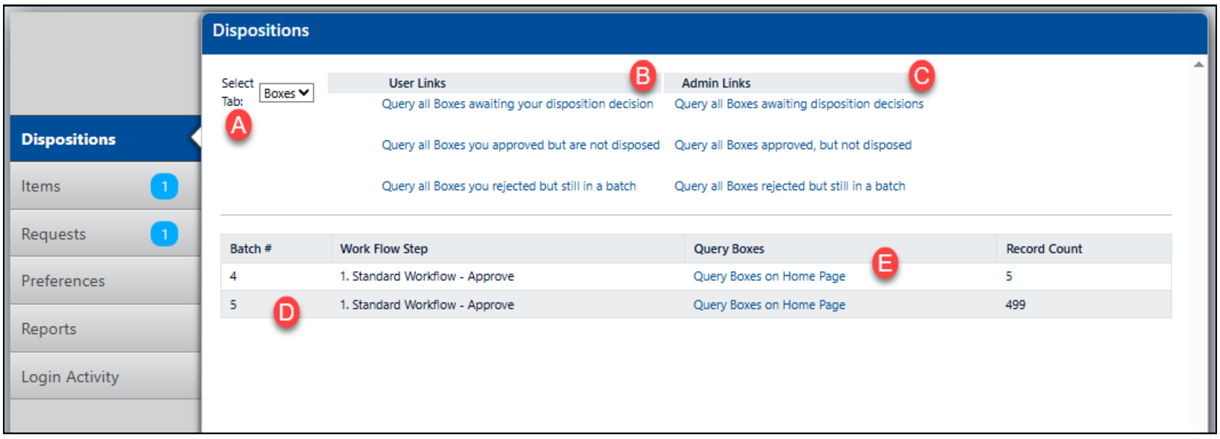
The Dashboard link is found on the Navigation Ribbon. Clicking on this link displays the 'Gimmal Physical Dashboard' screen in a separate browser window.



The Gimmal Physical Dashboard screen shows options available to the logged in user only. It contains five panels chosen by nodes on the left of the screen. They are detailed below:

1.4.1.3.6.1 Dispositions

The Dispositions panel provides convenient queries and links to aid the processing of dispositioning items.



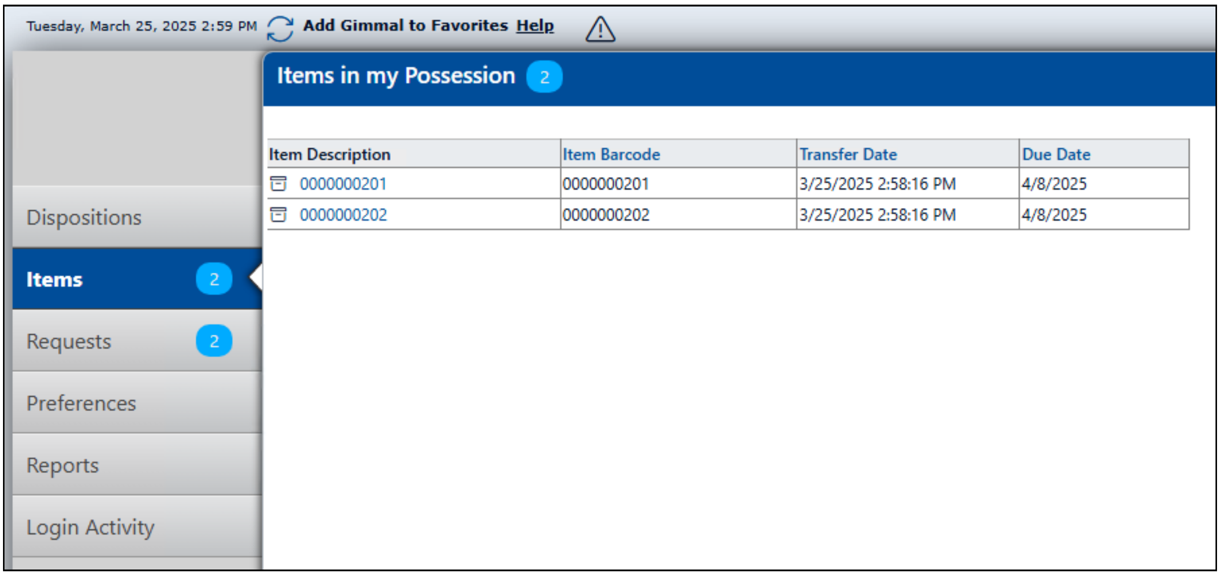
Users must first select the data type they wish to view from the 'Select Tab' drop down (A). The available queries will change based on the items available for disposition in the chosen tab. User links(B) are available for all users. Only users with administrator rights will be able to access the 'Admin Links' (C) which give a more detailed overview of all items in the disposition process.

Batch specific queries are available for view in the lower list. Use the links in the 'Query [data type]' column (E) to access the specific batch step awaiting your decision making.

All links will return users to the Home Page Grid where they can take further action including making Disposition Decisions (see page 128).

1.4.1.3.6.2 Items

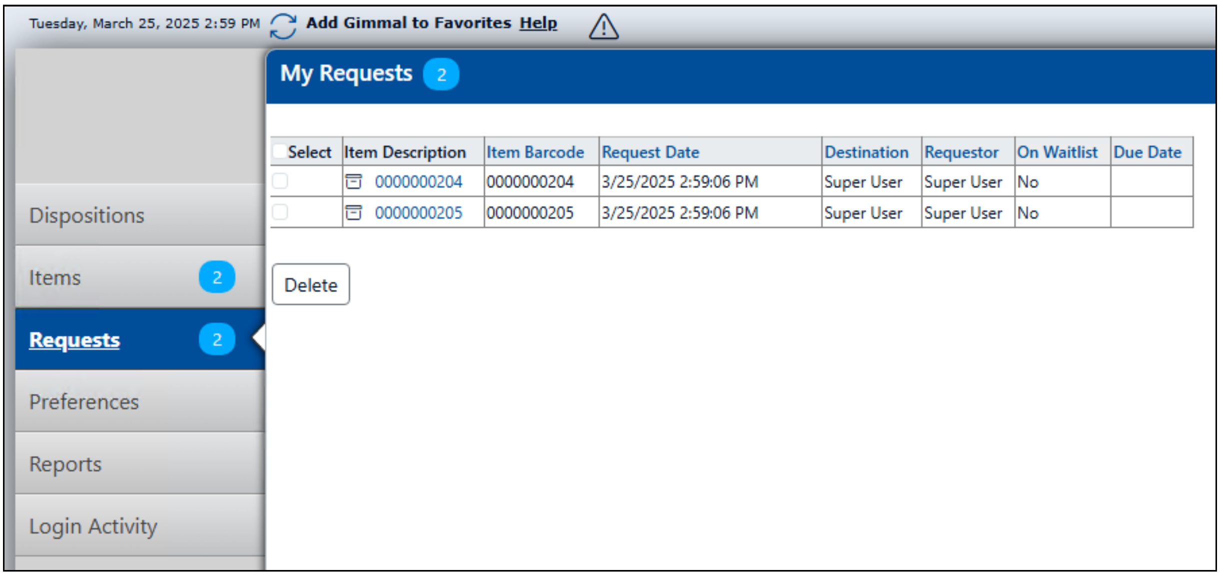
The Items panel shows the Items that Gimmal Physical has listed as currently in possession of the logged in user.



Note: Clicking on the link in the Item Description column will open the selected item in 'View' mode.

1.4.1.3.6.3 Requests

Selecting the Request panel will show all outstanding requests made by the logged in user. This list will include both available and waitlisted items.



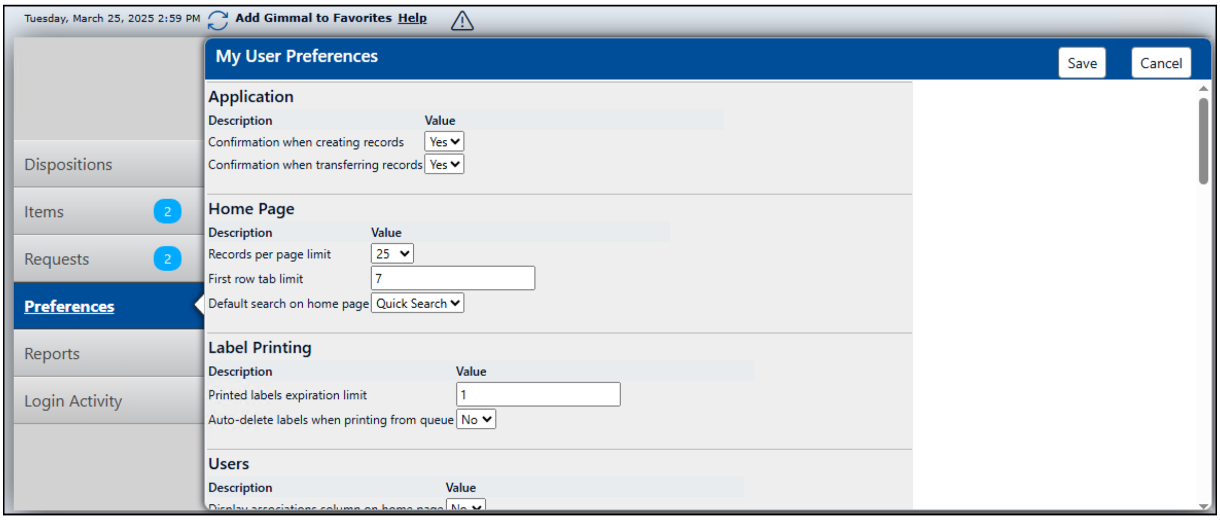
Note: Selecting one or more listed items and clicking the ‘Delete’ button will remove the selected request(s) from both the Dashboards and the Existing Requests queue.

1.4.1.3.6.4 Preferences

Clicking on the Preferences panel will show the preferences configurable by the logged in user. These preferences can be modified and saved on this screen.

Click the ‘Save’ button to store any changes to the values. Click ‘Cancel’ to restore the values before any changes were made.

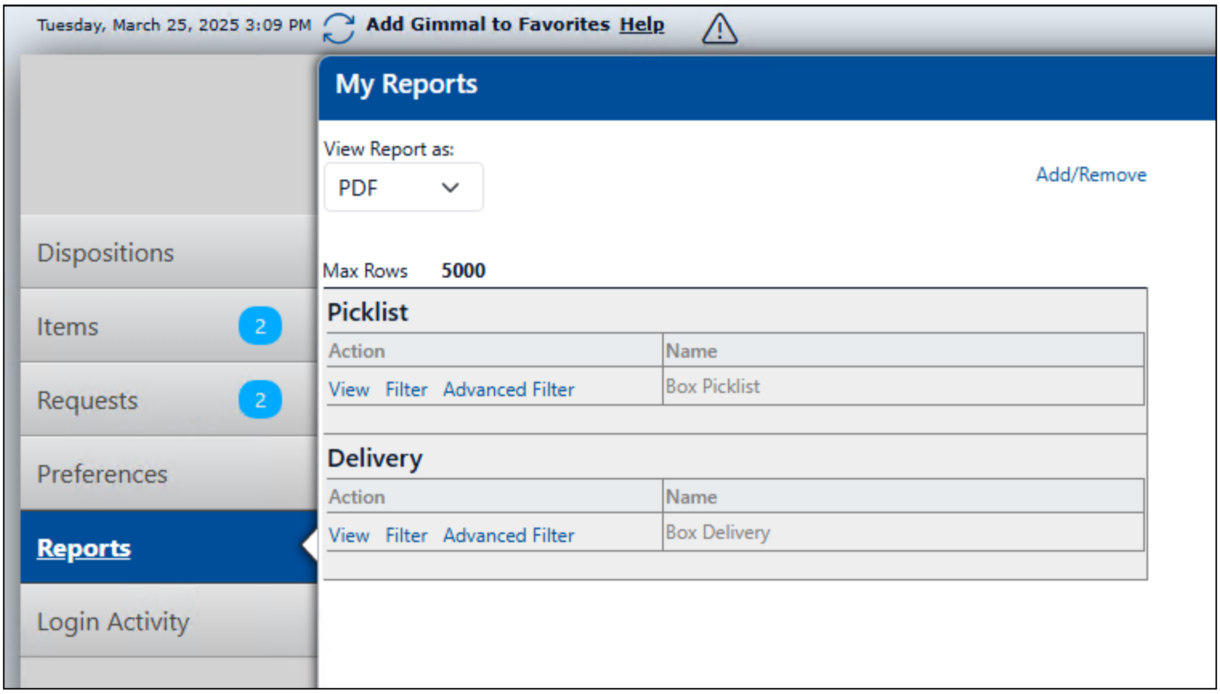
Note: All of these options are also found by clicking on the ‘Preferences’ section of the Navigation Ribbon and looking for preferences which have a ‘Scope’ of User.



1.4.1.3.6.5 Reports

Choosing the Reports panel will show all the reports that the logged in user has added to their personal Dashboard. These reports will be grouped in the same sections by type of report as seen on the main Reports page accessed via the Navigation Ribbon.

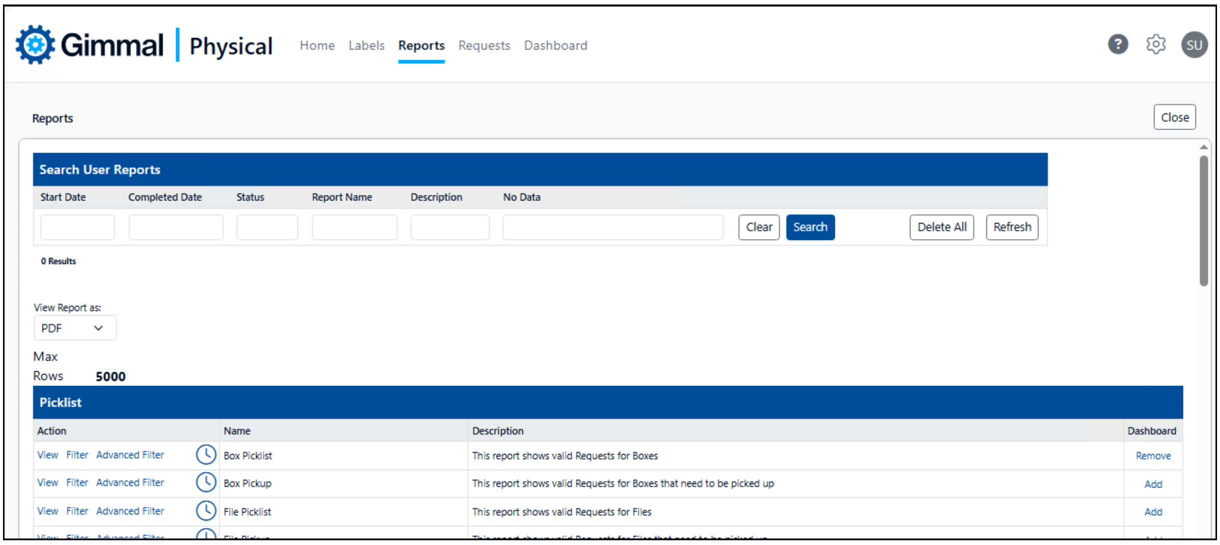
Note: Reports are added to this Reports panel via the Reports View accessed via the 'Add/Remove' link at the top of the page or via the Reports button on the Navigation Ribbon.



The Action column lists different actions that can be taken for the associated report. This list can change depending on the type of report. These options are mirrored on the Reports page.

- **View** initiates execution of the associated report. The report will then be accessible by clicking the 'Add/Remove' button from this screen, or the 'Reports' page (accessible from the Navigation Ribbon).
- **Filter** allows the user to enable a basic filter of the data for the associated report before it is executed.
- **Advanced Filter** directs the user to the advanced query page which allows more complex options for filtering data before the reports can be executed.

Clicking on the **'Add/Remove'** link from the Reports panel will open the Reports view which features a listing of reports available to the logged in user.

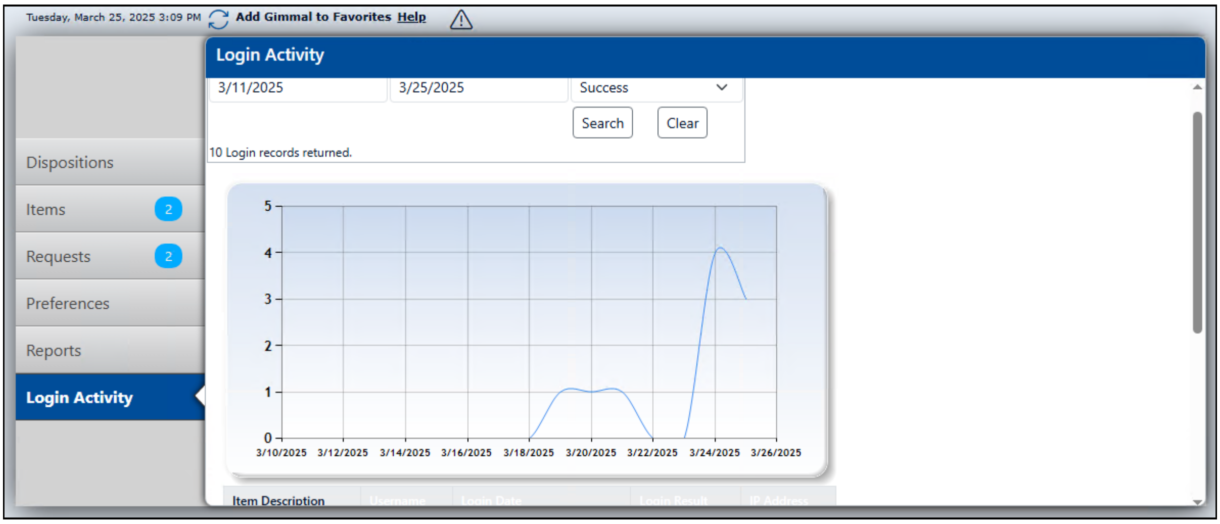


- The 'Dashboard' column on the far right will show a link that changes depending on the status of the report:
  - An 'Add' link will be shown if the associated report is available to include in the list of reports on the Dashboard. Clicking the 'Add' link will copy a link to the associated report to the Dashboard Reports panel.
  - A 'Remove' link will be shown to remove the associated report from the list of reports in the Dashboard. Clicking the 'Remove' link will remove the associated report shortcut from the Dashboard Reports panel.

Note: Clicking the 'Close' button closes the Reports screen, and returns the user to the Home Page. Choose the 'Dashboard' link from the Navigation Menu to return to the Dashboard view.

1.4.1.3.6.6 Login Activity

The last node is governed by a separate security right 'Enable Administrator Dashboard'. It shows the Login Activity for the application.



The ‘Result’ drop down box filters the chart accompanying table showing a paginated history of logins for the entire application. Select the option of choice, then click the ‘Search’ button. Click ‘Clear’ to return to the default view.

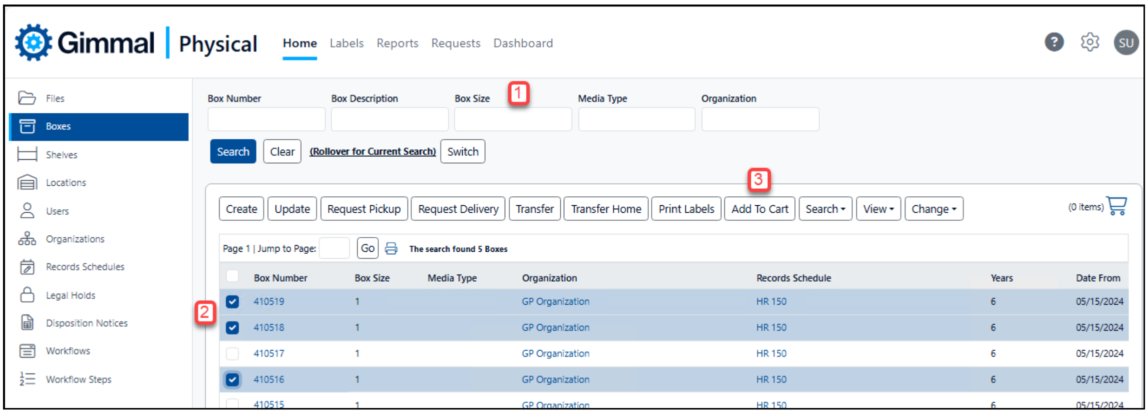
1.4.1.3.7 Cart Options

The Cart acts as a repository that allows users to perform common actions on items collected from multiple searches. This includes requests, transfers, and other actions.

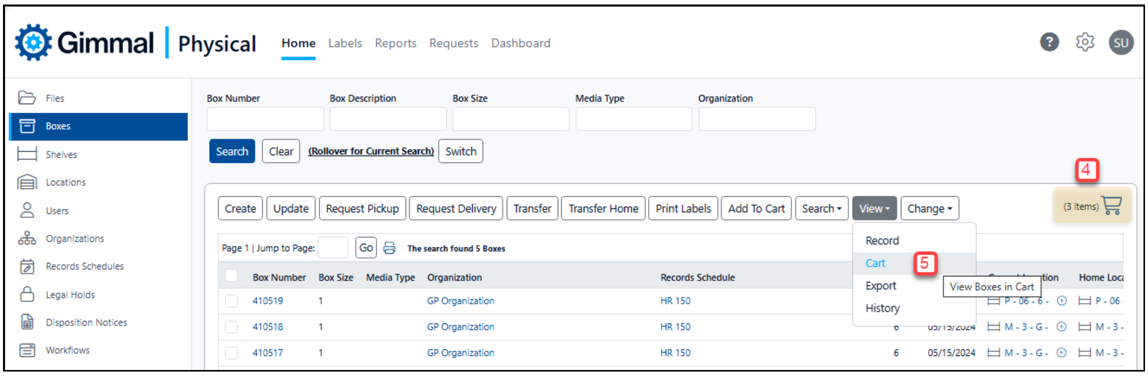
> *Add All to Cart* options are not available in Gimmal Physical versions 3.14 and below.

To add items to the Cart:

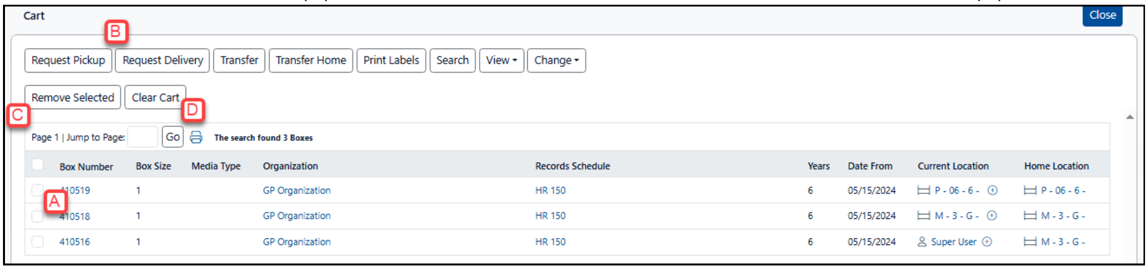
1. Search for the desired items using the search options on the tab that contains the item type you wish to add to the Cart.
2. Choose the items to add to the Cart.
    a. To choose selected items: check the box in the first column for each desired item,
    b. To add everything from the query, do not make any selections. This will add as an ‘Add all to Cart’ option.
3. Click the 'Add to Cart' button. A verification message will appear with the total number of items to be added to the cart.



4. After items are added to the cart the cart quantity for this data tab is displayed to the right of the action bar.



5. To view the Cart, click on the View action button and select ‘Cart’ from the drop down menu.
6. To perform an action on the items in the cart, select the desired records (A) and then click on the appropriate Action Button (B).
7. After the action is performed, you can remove the selected items from the cart by clicking the Remove Selected button (C) or to remove all the items at once click the Clear Cart (D) button.



Helpful tips:

- Users can enable a confirmation when adding items to the cart. This is found by selecting Preferences from the Navigation Ribbon, choosing ‘Application’, and enabling ‘Confirmation when adding to cart’.
- When adding selected items to the cart, the additions are processed immediately. However, when adding over 5,000 items to the cart, a background job will take over the process. This prevents interface timeouts but can take a significant amount of time before the cart can be updated.
- Carts are per user and cannot be shared.

1.4.1.4 Managing Data

Please review the articles below for information on various data options.

- Data Creation (see page 56)
- Data Deletion (see page 70)
- Requesting Items (see page 76)
- Transferring Records (see page 83)

- Exporting (see page 86)

1.4.1.4.1 Data Creation

This section outlines the methods of creating data in Gimmal Physical. Please click on the links to the left to view articles of interest or select from the links below:

- Creating & Updating Individual Records (see page 56)
- Bulk Create (see page 61)
- Bulk Update (see page 63)
- Import File Process Guide (see page 65)

For creating users, please see the interactive tutorial here[7].

1.4.1.4.1.1 Creating & Updating Individual Records

This topic has an interactive tutorial. To view this tutorial, click here[8].

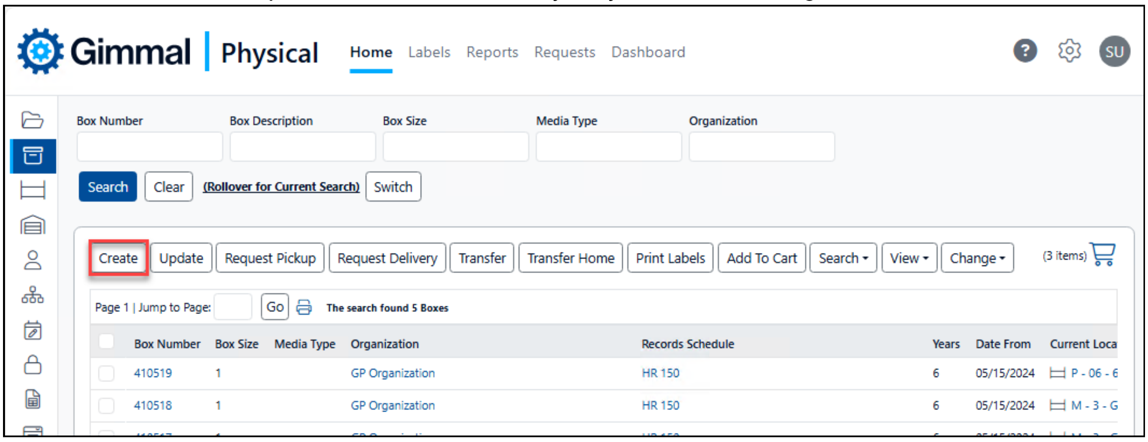
There are many ways to create and update new records in Gimmal Physical. This article covers creating and updating individual records within the user interface. Before beginning, it may be helpful to review Preferences to help make data entry more efficient.

Please Note: If you do not see options to create or update data, please contact your administrator to ensure you have the correct permissions.

Creating New Records

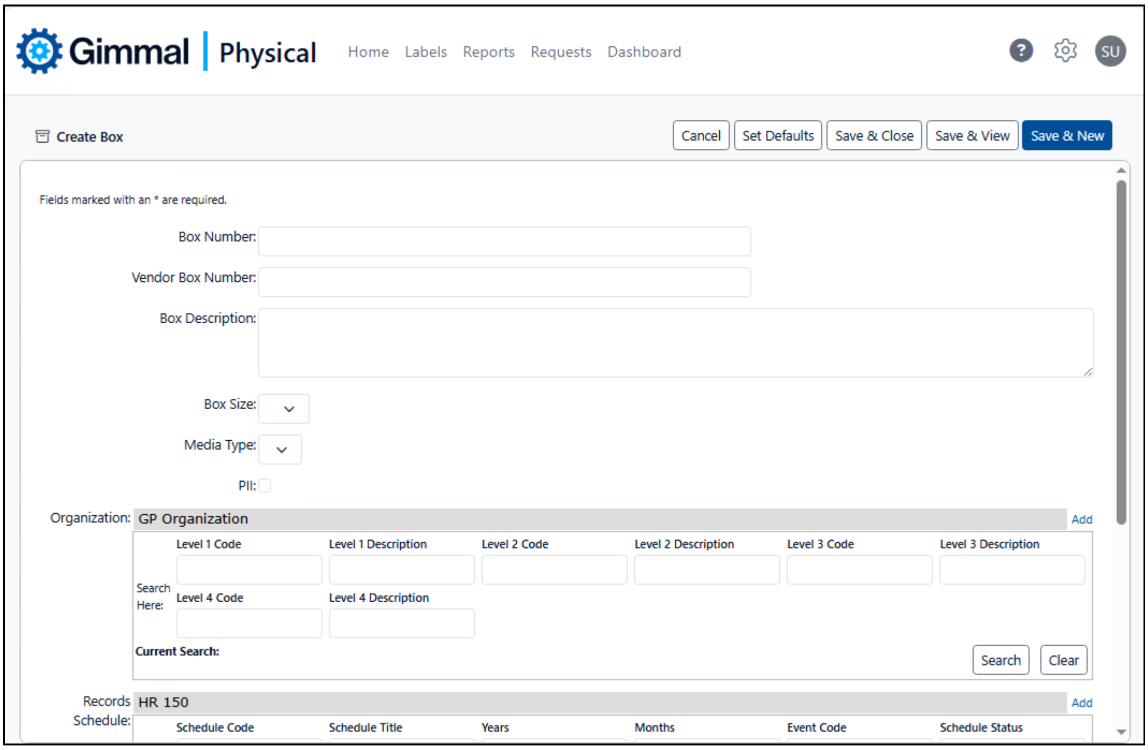
Follow the steps below to create a new item in the Gimmal Physical User Interface:

1. Select the appropriate data tab from the Home Page. In our example, we will use Boxes.
2. Click the 'Create' button. This will open a 'Create Box' page.
   Note: Action button captions and locations may vary based on configuration.



7. https://app.getlancey.com/demo/15b69ed24a874e58a56ddfa4b8260a95
8. https://gimmal.navattic.com/iv10i5j

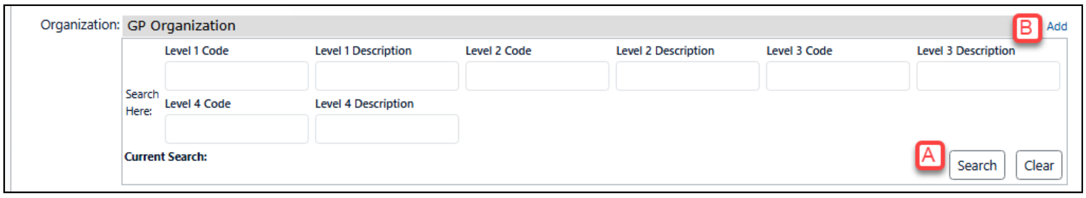
3. The Create Items page (in our example, 'Create Box') has several useful buttons at the top of the form:



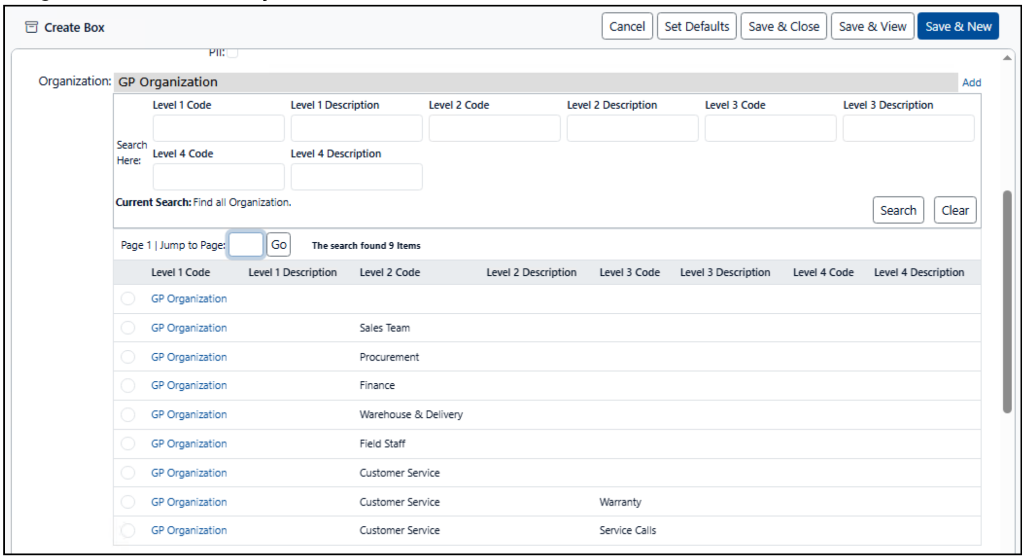
a. **Cancel** closes the form without saving changes.
b. **Set Defaults** saves the currently entered values as defaults for any new record of the same type.
c. **Save & Close** will save all fields and close the form, returning to the home page.
d. **Save & View** will save all fields and go to the View page for the item. This is useful if your next step is to take action on this item such as transferring it to another location or printing a label
e. **Save & New** will save all fields for this item and remain on the page to create a new item. This option also allows for the use of use of Carry Forward (configurable by your system administrators).

4. Fill in the necessary information by entering values on the Create Boxes page. There are several types of fields you may encounter on any creation screen:
   a. **Required fields** can be of any type, but are delineated by an asterisk, i.e. '*'. You will not be able to save the record without populating data into these fields
   b. **Text fields** like Box Description in our example take any text as an input. Some of these fields are restricted by size, others allow longer entries.
   c. **Numeric fields** like Box Number in our example accept only numeric input.

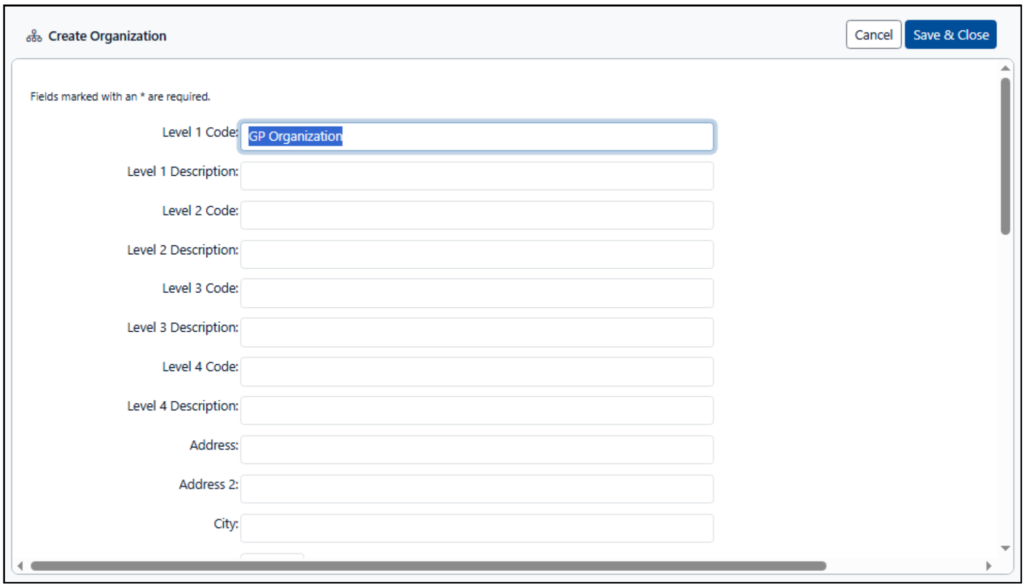
d. **Date Fields** are restricted to date entries only.
   Note: The format of the date entered may be controlled in the settings of the application. Please check with your administrator for the correct format in use for your organization.
e. **Range Fields** are fields that accept entries for a start and end value (e.g. '24-45' or 'Apple-Orange'). These fields must have a delimiter. The benefit of these fields is that that values between the ranges can be found in an appropriately configured search.
f. **Check Box** fields allow users to click the field for a 'Yes' or otherwise positive value, or leave the value unchecked to indicate a 'No' or negative value for that field option.
g. **Simple List** shows as drop downs that contain specific values so that a single value can be selected from the list. Fields like Status or Box Size tend to be simple list controls.
h. **Large List Controls** have many entries from which a user can select one, or in some cases multiple options. These controls typically have a search function that allows users to filter the available values.



   i. By default*, no values are listed. Clicking the 'Search' button (A) will show the list of available values. Selecting a record will update the field value. This, in turn, may filter additional controls.
      *Note; Configured security may limit the available values to one item. In this case, the single value is listed by default.



   ii. If the option you are seeking is not in the list, and your security profile allows it, you may want to add a value to the list. The 'Add' button (B) allows you to do this by opening a creation screen for the data type shown in the field (in this example, Organization).



5. Click the appropriate button to save your changes.
   a. If any errors occur, a warning notification will be at the top of the screen.
   b. Errors may also be listed at the field level if the entered values fail to pass a configured validation test.

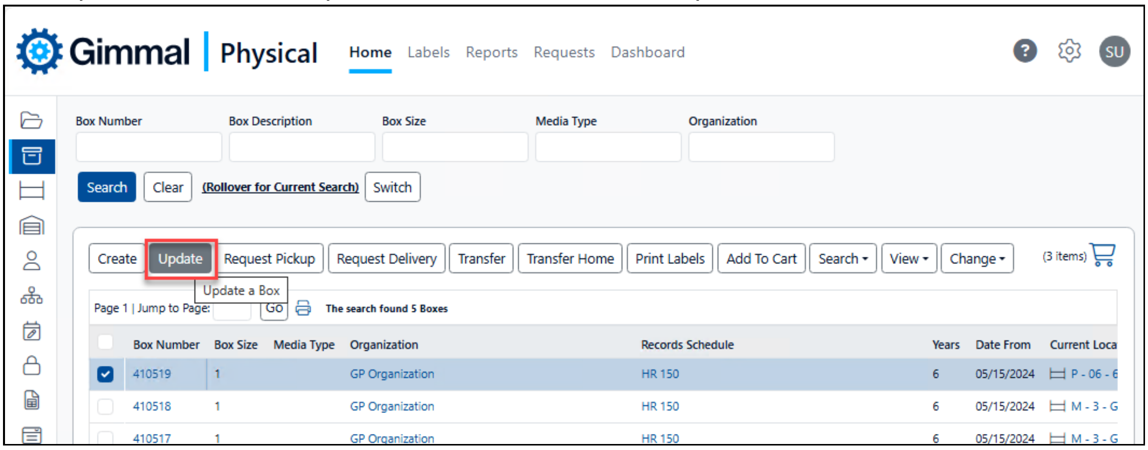
Helpful Tips:

- Users can turn on the preference for ‘Confirmation when creating records’ under ‘Application’ Preferences. That will show an alert box of successful item creation after creating every item in Gimmal Physical.
- To quickly find the value in any drop down list, you can type some or all of the value.
- Other methods of record creation include:
  - Bulk Create (see page 61)
  - Imports (see page 65)
- Additional options can be configured by system administrators to make the process of creating data more efficient:
  - Carry Forward fields
  - Pattern sequencing (see page 140)

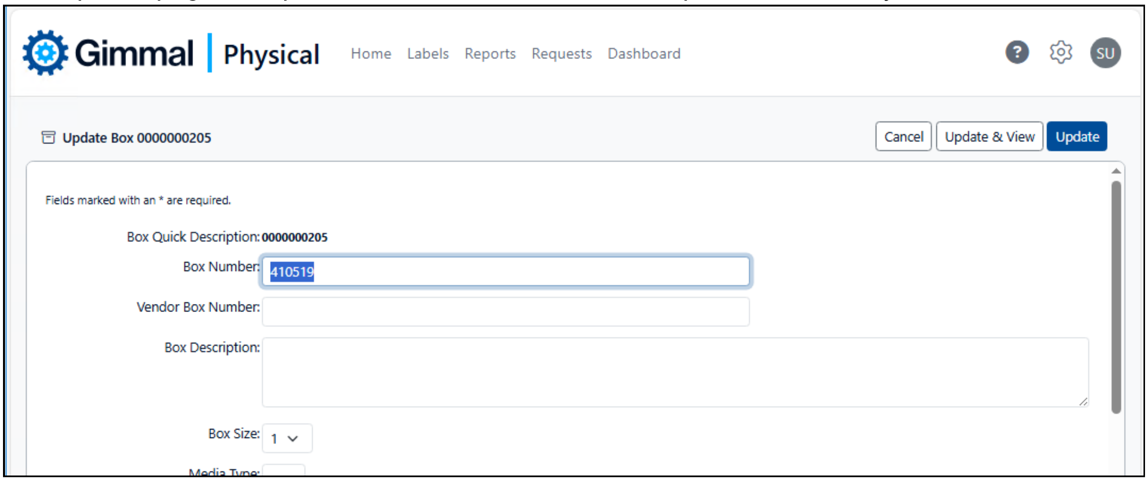
Updating Records

1. To update a record, you must first select the item you wish to update, then click the ‘Update’ button from the Action Menu.

Note: You can use the various Search options to help you find the record you need to update. Bulk Update or Search & Replace can be used to alter multiple records at one time.



2. The ‘Update’ page will open. It will be titled with the description of the item you selected.



3. Change the fields that need to be updated.
   Note: The fields that are required for that item type will still be required on the update page. Required fields will be marked with an asterisk ‘*’. Your application may also be configured to require a reason for change. If this is the case, you must supply text for the ‘Reason for Change’ field.
4. Choose the button to manage your changes
   a. **Update & View** will save the changes and keep you in the view mode for the page. This is helpful if you need to perform an action (e.g. transfer) on the item after it has been updated.
   b. **Update** will save your changes and take you back to the home page.
   c. **Cancel** will return to the home page without saving your changes.

Helpful Tip:

To update multiple records at once, use the Bulk Update functionality.

1.4.1.4.1.2 Bulk Create

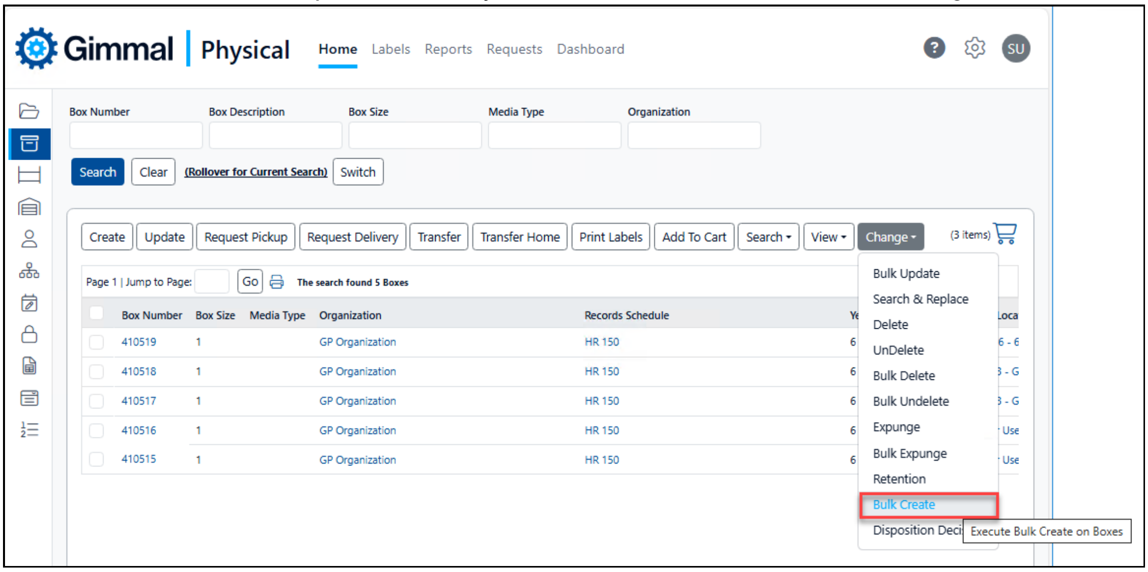
Gimmal Physical supports the creation of multiple records for users who need to add a number of similar items to the application efficiently. Rather than creating multiple individual records that have identical fields, Bulk Create saves time creating multiple items at once via the interface. These records will be identical in detail, except the individual item records will have different barcodes.

Please Note:

- Bulk Create is only available for item types that have a barcode.
- Bulk Create will fail if any combination of fields have been defined as unique (includes both 'Prevent Duplicate' and 'Unique Index' settings) for the tab.
- Bulk Creates have the potential to consume significant resources. As a result, it is recommended that large Bulk Creates be performed during off hours.
- For this feature to work properly, barcodes must be auto generated by the Gimmal Physical application.

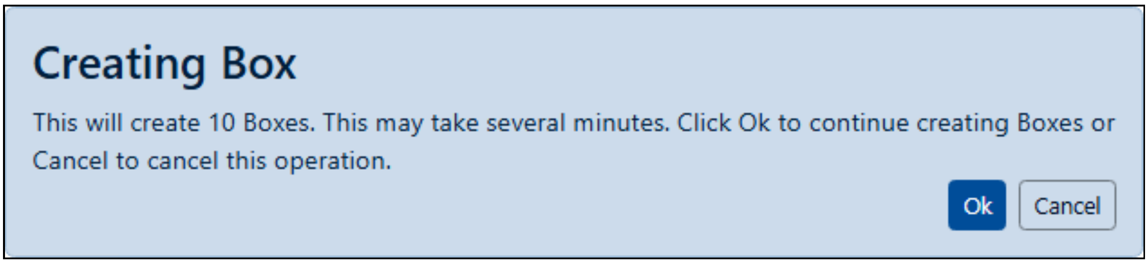
To Bulk Create items in Gimmal Physical:

1. Select the data tab in which to bulk create the items.
2. Click on the 'Bulk Create' option. This may be located in a sub-menu of an existing Action Button.

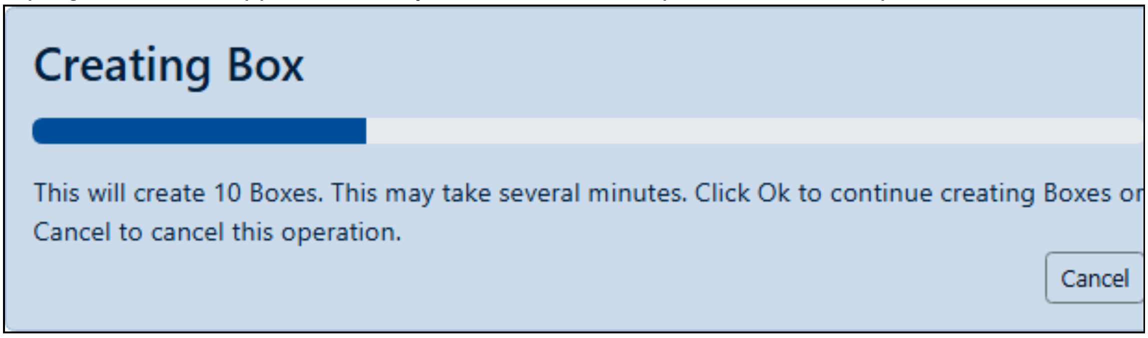


3. The Bulk Create Item page opens. This screen is identical to a standard item creation page, except there is an option for 'Number of Items to Create'.
4. Enter the number of items to create as well as the data in the rest of the fields you wish to duplicate.
5. Click the *Create Items* button.

6. A pop-up box will appear to verify the bulk creation. For example, creating 10 boxes in bulk create will show:



7. Click 'OK' to initiate the bulk creation.
   Note: Creating a large number of items may consume significant time.
8. A progress bar will appear. You may click 'Cancel' to stop the bulk create operation.



9. Once completed, a new pop-up box will appear confirming the successful creation, clicking 'OK' will return you to the home page.

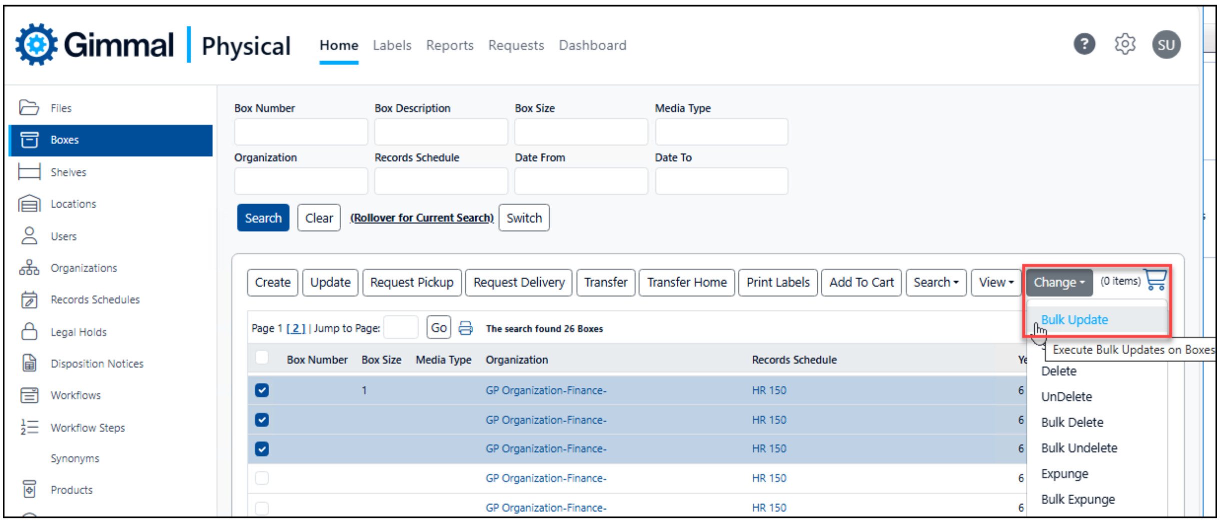
1.4.1.4.1.3 Bulk Update

Gimmal Physical's bulk update functionality allows you to make multiple updates to several items simultaneously, saving time and reducing the potential for errors.

- Although Bulk Updates are recorded in history, the updates cannot always be undone.
- Bulk updates to a large number of records should not be performed when other users may be creating or editing those same records.
- Bulk Updates have the potential to consume significant system resources. As a result, it is recommended that large Bulk Updates be performed during off-hours.

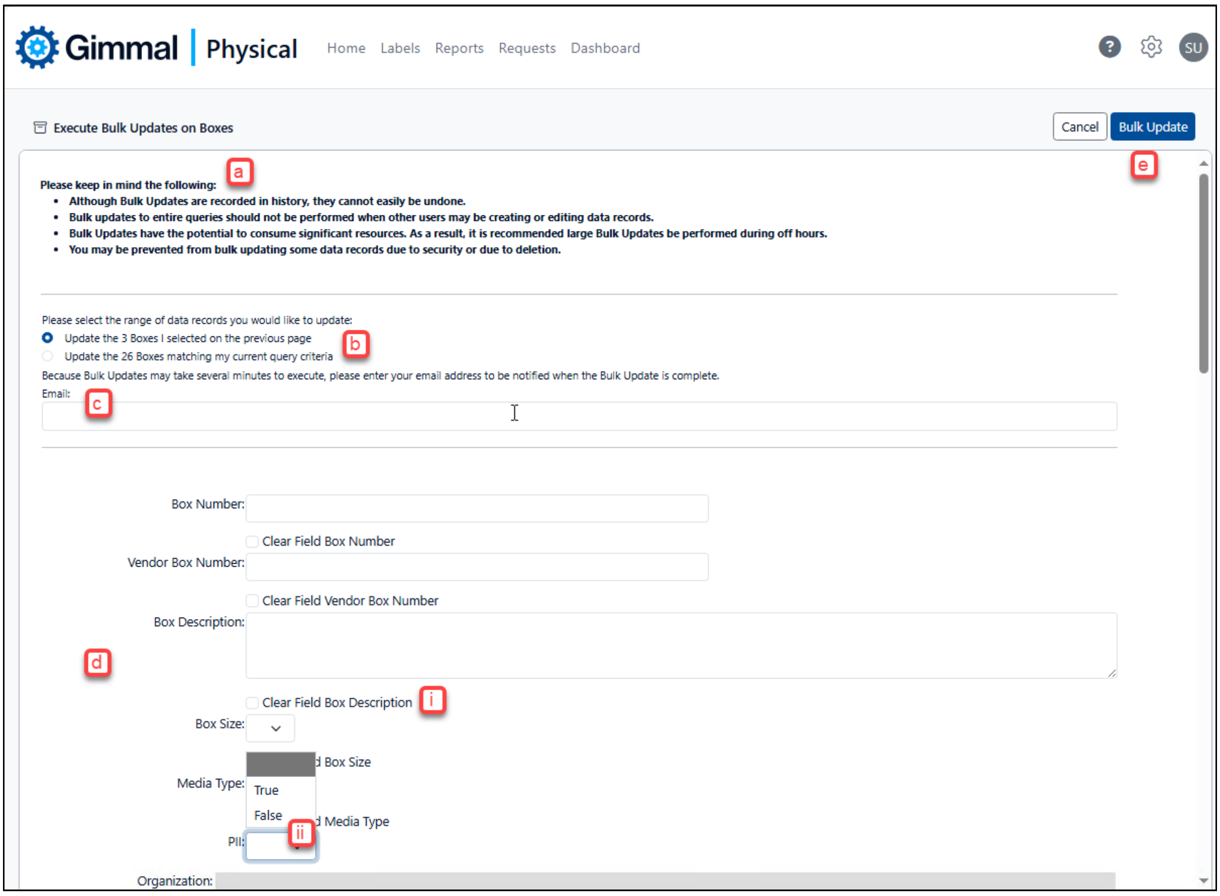
Bulk Updating items in Gimmal Physical

Using the example of Boxes:



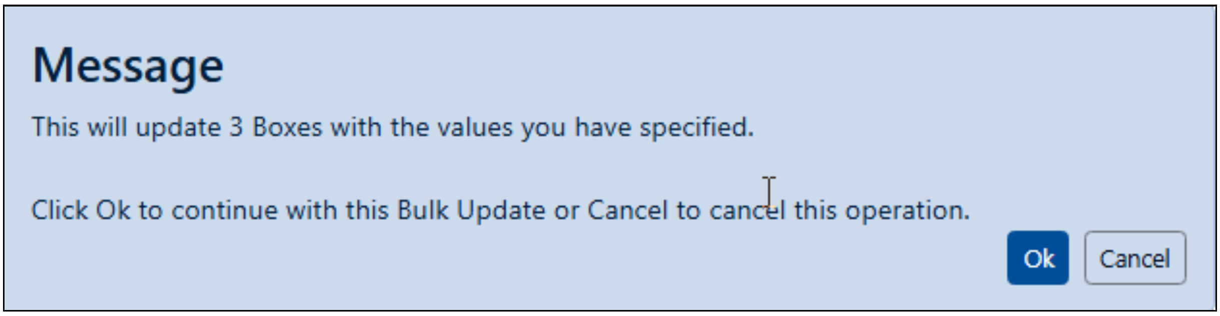
1. Search for the desired records using your preferred search technique on the Home Page Grid.
2. To bulk update specific records in the search results, select the desired records using the checkboxes before proceeding. To update Bulk Update all records in the query, do not check any records.
   Note: You will have the choice of Selected or All items on the Execute Bulk Actions page, but the default is chosen based on the selections on the Home Page Grid.
3. Click the **Bulk Update** Action Button - usually found in the Change drop-down in the action buttons. This opens the Execute Bulk Update page
4. On the Execute Bulk Updates on Boxes page there are several options
   a. **Important considerations** - please read before executing bulk update operations, especially those affecting large numbers of items.
   b. **Range of data records to update** - You can choose to update the specific items selected on the previous page, or all of the items that were returned in your search.

c. **Email (optional)** - Enter an email address if you would like to be notified when the bulk update operation completes.
d. **Item fields to update** - Enter the new values in the fields you wish to update. Ignore any fields you do not wish to update. Please note:
    i. To clear a field of any existing data, check the appropriate **Clear Field** checkbox.
    ii. Fields that normally appear as a Yes/No checkbox use True and False to represent the field being checked and unchecked.
e. After entering all desired updates, click **Bulk Update** to submit the changes.



12 Bulk updating boxes

5. You will be asked for confirmation to continue with this bulk update. Click Ok to continue the update operation. Clicking Cancel returns you to the Execute Bulk Updates page seen above.



1.4.1.4.1.4 Import File Process Guide

This topic has an interactive tutorial. To view this tutorial, click here[9].

General Information

Gimmal Physical includes several options for adding or modifying data in the application

1. Entering data via the interface, one record at a time. See Creating & Updating Records (User Interface) (see page 56) for more details.
2. Importing multiple records via the interface using a .CSV or .TXT formatted document
3. Setting up an automated import using Gimmal FileConnect. See the FileConnect User Guide (see page 147) for more information.

This article covers the multi-record imports via the interface (#2 above).

Prerequisites

- Import files must be in UTF-8 format
- Files must be in .CSV or .TXT format
- Import Profiles must be defined before a file import can proceed
- If you are queuing labels for printing based on imported values, the Preferences | Label Printing must be set to 'Yes'.

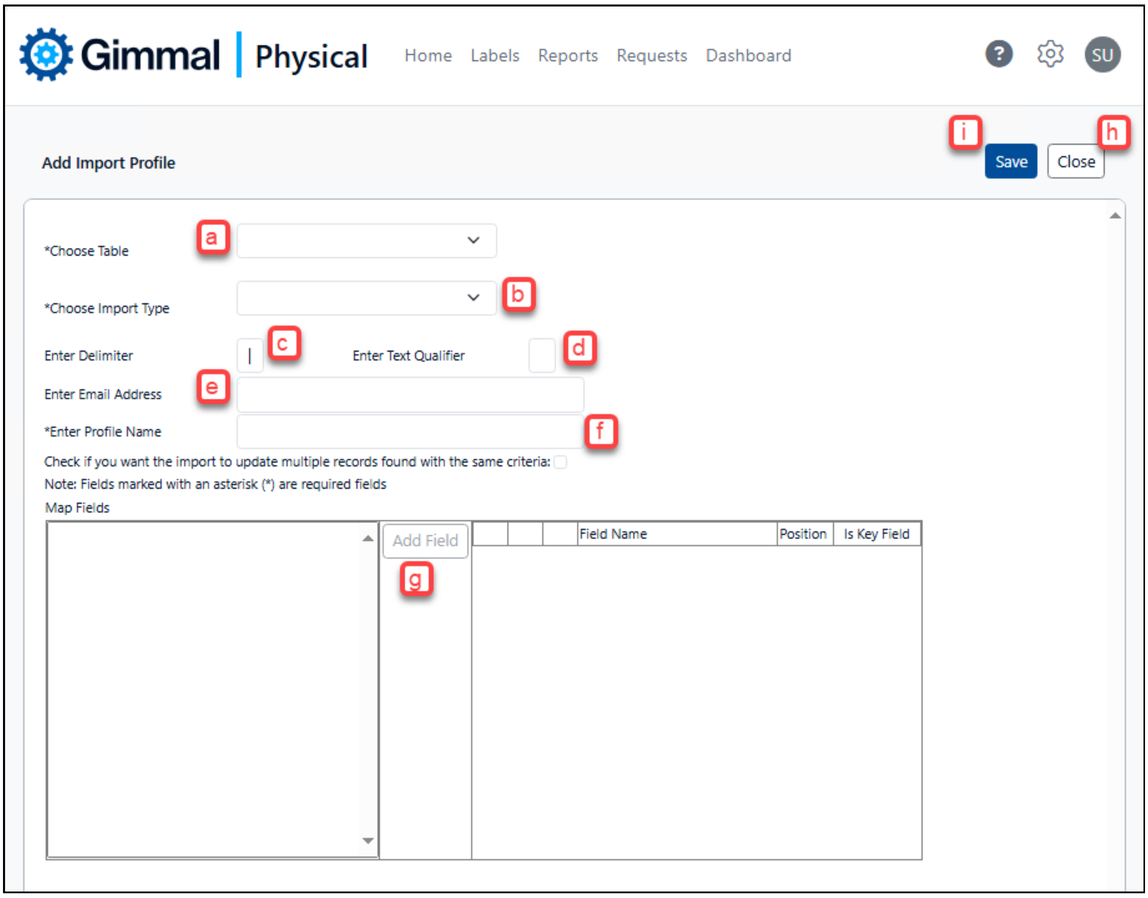
Configure Import Profile

An Import Profile is a specification that tells the Gimmal Physical application how the data file is structured and where the data needs to be imported.

To configure an Import profile:

1. Click on the **Admin** link in the Navigation Menu.
2. Click on the **Import Profiles** link under 'Configuration' on the Administration page.
3. Click on the **Add Profile** link on the Configure Import Profiles page. The *Add Import Profile* page will open.

9. https://gimmal.navattic.com/21k01uy



4. Configure an Import Profile by following these steps:
   a. Choose the Table for which data will be imported.
   b. Choose the Import Types. Depending on the type of table, you will be given different Import Types to select from:
      i. Tables with each listed record matching just a single entry (one-to-one):
         1. Add – all entries will be added to the chosen table
         2. Modify – listed entries in the import file will modify entries only if they match records in the chosen table
         3. Add/Modify- listed in the import file will update entries already existing in the listed table and add new records for items that do not have a match
      ii. Tables are listed as x to y, where x and y are values linked together. Each entry can have multiple options listed in the import (many-to-many). Please see Many-to-Many Notes below for further tips.
         1. Add – new records will be added to the chosen table, and the relationship between the records will be established
         2. Delete/Add – items that match the first column identifier will be cleared, and items from the list re-added.
   c. Accept the default delimiter or enter another.
   d. Specify the text qualifier if applicable.

e. Enter the email address to notify upon completion of the Import.
f. Enter a meaningful name to give this Import Profile.
g. Map Fields – Select the fields that will be used in the import file. The fields should be mapped in the order in which they will occur in the source file.
 Note, for either Add/Modify or Modify Import types, you must specify at least one field as a Key Field. You may specify multiple fields to be used in conjunction if appropriate. Gimmal Physical will use Key Fields data to determine whether to add an incoming record as new or to modify an existing record already in the application.
h. Click Save.
i. Click Close.

Importing Data from Files

Gimmal Physical offers a choice: manually import files or set up an automated import via FileConnect.

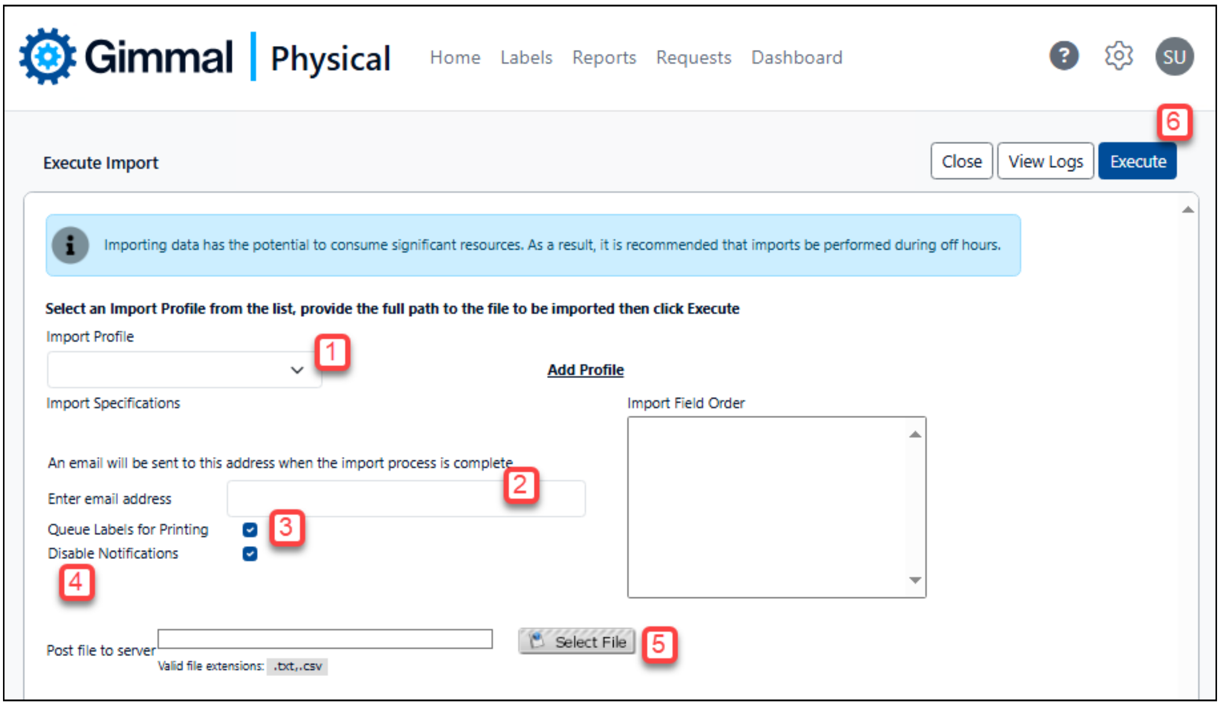
Regardless of the method, when an Import Profile is executed via an import command (manual or automated), the Import will process each line of the source file.

After the Import is complete, an email specifying the results will be sent to the specified email address. Import Logs and Import Error files will be generated, as appropriate.

Note: To execute a Gimmal Physical Import, you must have a valid Import Profile. If you have not created an Import Profile, please refer to the Configure Import Profile section above.

Manually Import File

To import files one at a time manually, first navigate to the **Import** option under the 'Data' Section of the Admin Navigation Menu.



To navigate to the Execute Import page, click on the Admin Navigation Menu. Then click on the Import link on the Administration page under the Data Section.

To execute an Import profile:

1. Choose the profile to execute from the drop-down list. The Import Field Order will be populated based on the Import Profile selected.
2. To send a notification to a specific email address once the import is complete, enter the chosen address in the 'Enter email address' text box.
3. The 'Queue Labels for Printing' checkbox is used if labels are being printed. Leave unchecked if labels are not being printed as part of the import.
4. When you import data, the application may be configured to send notifications regarding item creation, update, transfer, or other actions that an import can perform. If these notifications remain enabled, this can result in an unwanted amount of communication. We therefore suggest disabling notifications when using the imports by checking the 'Disable Notifications' box.
5. Choose the file to be imported by using the 'Select File' button.
6. Click the 'Execute' button to run the import.

Note: Imports may take some time. Review the Import logs once the import is completed. We recommend using the email option to alert you when the import is complete.

Automating a File Import

If you have data that will be updated often, it may be beneficial to automate a file import. This functionality is covered in the FileConnect User Guide.

Import Logs

The import logs and Import error files can be viewed from the Import Profile page or the *Admin > Data > Import Logs page.*

a. Search Import Logs by any of the fields provided.

b. Result Log File: This file shows the number of successful files and the files that failed. If there are errors, this file explains the errors.

c. Result Error File: This file is a copy of the errors that failed. The errors can be corrected within the error file and re-imported.
Note: Even though Gimmal Physical will generate an error file if you use column headers, we still recommend the use of column headers to help identify the individual columns for troubleshooting purposes.

Import Tips

1. If you are importing Files and/or Boxes, ensure any related higher-level data is already present in the application before starting the importing process. It is best to work down the hierarchy within the application. An example hierarchy beginning at the highest level:
   - Organizations
     - Record Schedules
       - Locations

        - Shelves
            - Boxes
              - Files
2. Quick Descriptions should be used for the following logical tabs: Organization and Record Schedules.
3. A barcode should be used for the Current and Home Location.
4. Access to the Import functionality is controlled under the Roles and Permissions.
5. List Values need to be added before importing. See below for adding list values.
6. Required fields must be included in the Import Profile.
7. Any data that is a Tab or a List can be imported into the application via the Import Profile.
8. If you want the application to automatically assign barcodes for newly created items, do not add the barcode to your Import Profile. However, keep in mind that:
    a. Your application must be configured to automatically add barcodes for new items
    b. Barcodes are often required when using a Many to Many Import
9. Add an "Ignore" value if you have columns in your CSV file that are not needed in the current Import Profile. When you proceed with executing the Import, the Ignore field will also appear in the Field Order; however, the values will not be imported.
10. Scheduling of imports can only be accomplished via the FileConnect Utility, not from within the Gimmal Physical interface.

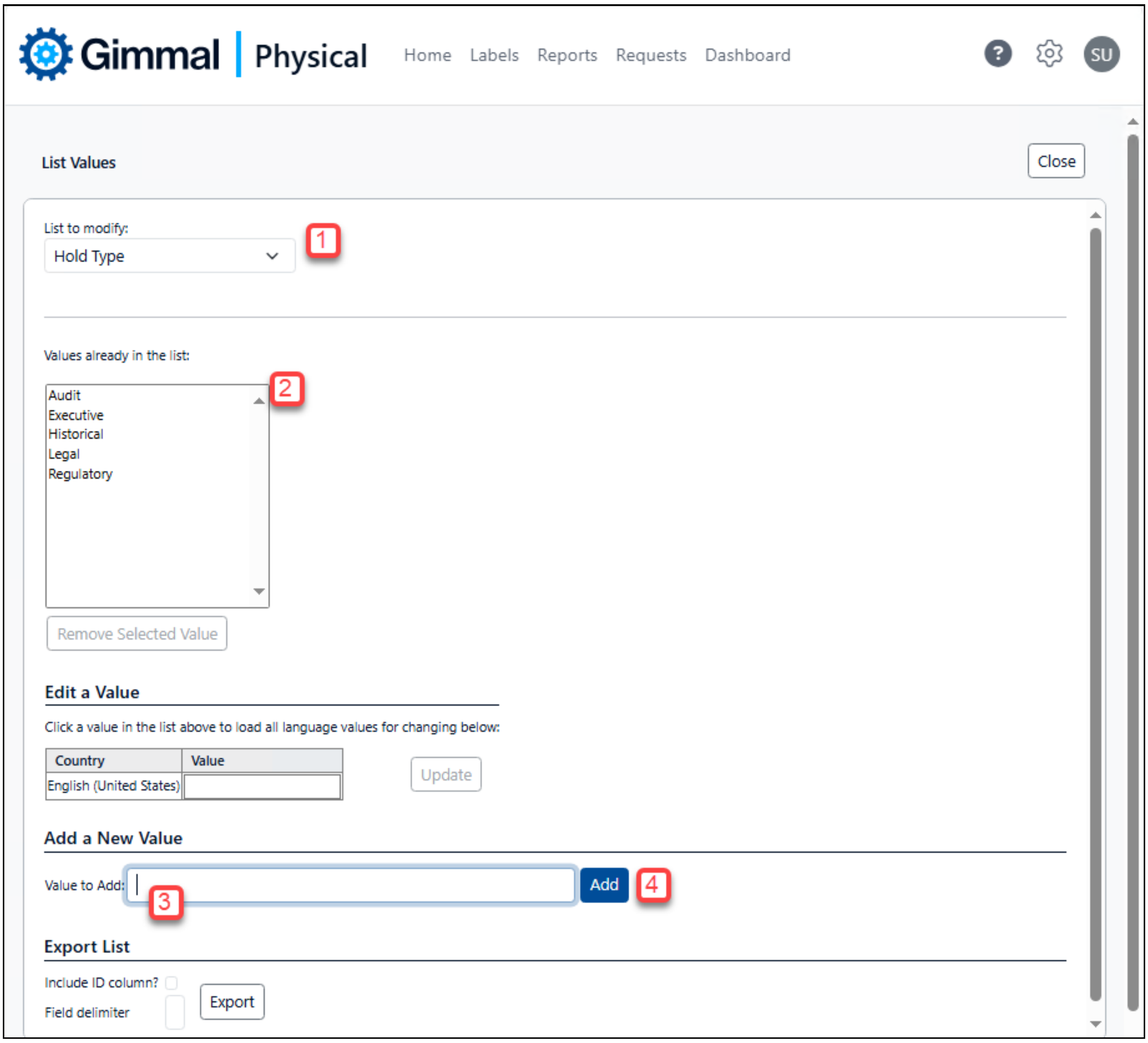
Many to Many Notes

- Only tables whose schema supports Many to Many will show in the 'Choose Table' List alongside traditional single-level tab imports
- The Quick Description is used for the source key field in Many to Many Imports. If the Quick Description is set to something other than the key field (and only that field), the Many to Many import will not work.

Adding List Values

The list values can be added at *Admin > Data > List Values*. To add values to the simple list,

1. Select the appropriate list from the "List to Modify" drop-down box.
2. If you wish to edit an existing value, select it in the 'Values already in the list" control.
3. Type the values you wish to add in the 'Value to Add' text box.
4. Finally, click the 'Add' button or press the enter key.



Questions

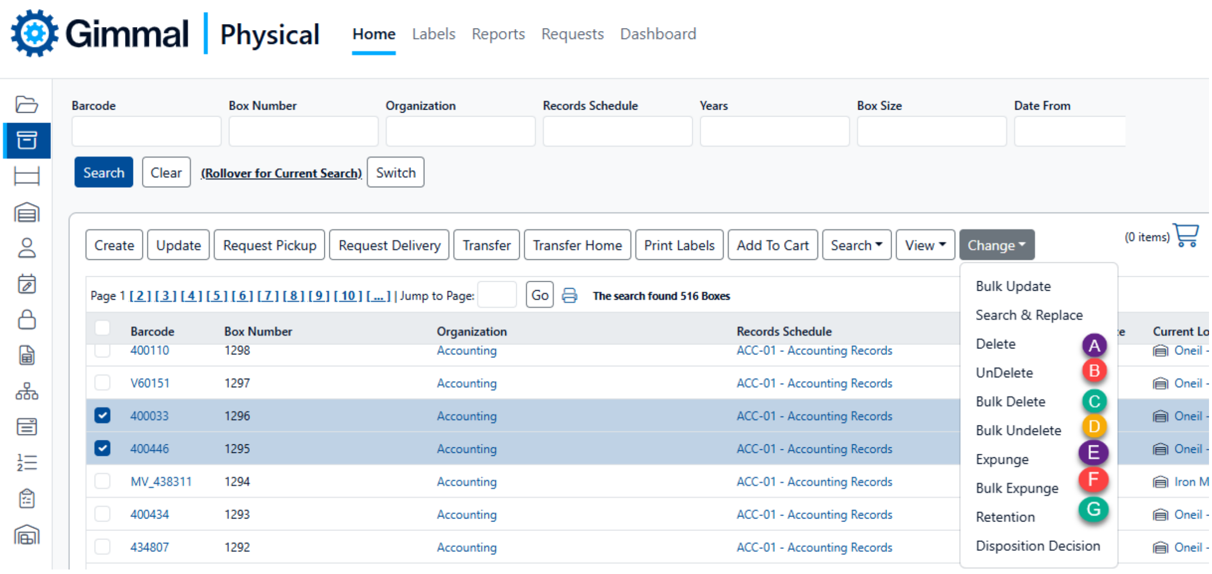
Please direct any questions to the Gimmal Technical Support Team at support@gimmal.com[10].

1.4.1.4.2 Data Deletion

Gimmal Physical supports both the deletion (flagging a record as deleted in the application) and expunging (removing it from the application completely) of a data record. Deleting a record removes the record from processing, viewing, and retention, but keeps the record in the application, in a 'deleted' state. It provides for the future reinstatement of the same record if necessary. Additionally, depending upon the security configuration for a given role, deleted records may still be queried (they appear italicized in the Home Page Grid) and viewed.

Expunging completely removes the record from the application and will no longer be available for any additional action.

10. mailto:support@gimmal.com



The location of the Delete options is configurable by the system administrator. They may appear as their own button or under another Action Button.

1.4.1.4.2.1 Deleting Records

Delete a Single Record

Only one record at a time can be deleted using the Delete option. Bulk Delete can be used for deleting multiple records.

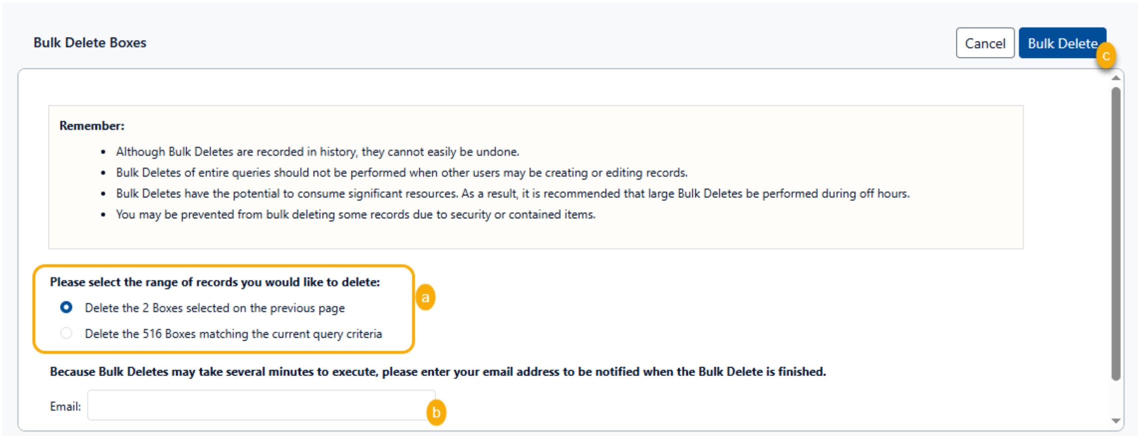
To delete a single item in Gimmal Physical:

1. Find the desired items by using one of the search options (see page 95).
2. Select the item you wish to delete.
3. Choose the Delete option from the ‘Change’ action button (A).
4. The Delete screen will open for review of the item to be deleted.
5. Click the ‘Delete’ button on the Delete screen to complete the deletion.

Bulk Delete

The Bulk Delete action is designed to delete multiple records at once. (C)

1. Find the desired items by using one of the search options (see page 95).
2. Select the items you wish to delete.
3. Select Bulk Delete from the menu (C). This opens the Bulk Delete screen (see screenshot below)

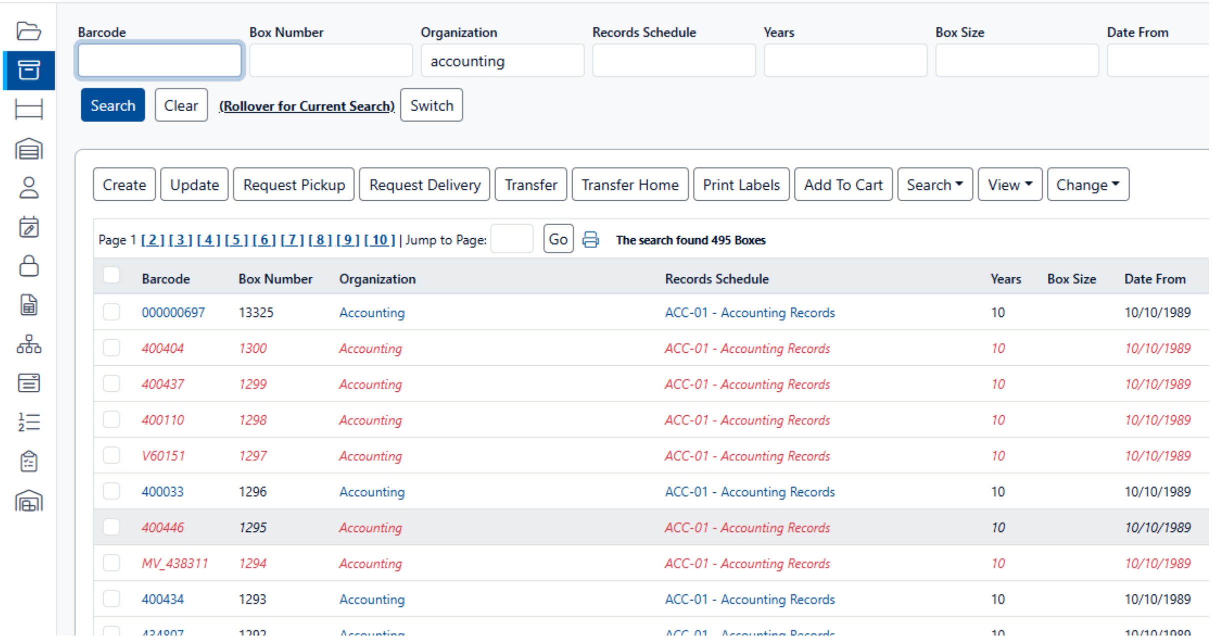


4. Choose whether to delete all the items in the current query or just the ones that were selected. (a)
5. Optionally, enter an email address to receive a notification that the bulk delete has completed. (b)
6. Click the ‘Bulk Delete’ button to begin the bulk delete process. (c)

> ⚠ Use 'Bulk Delete' with care. Although items can be restored, it is a many-step process.

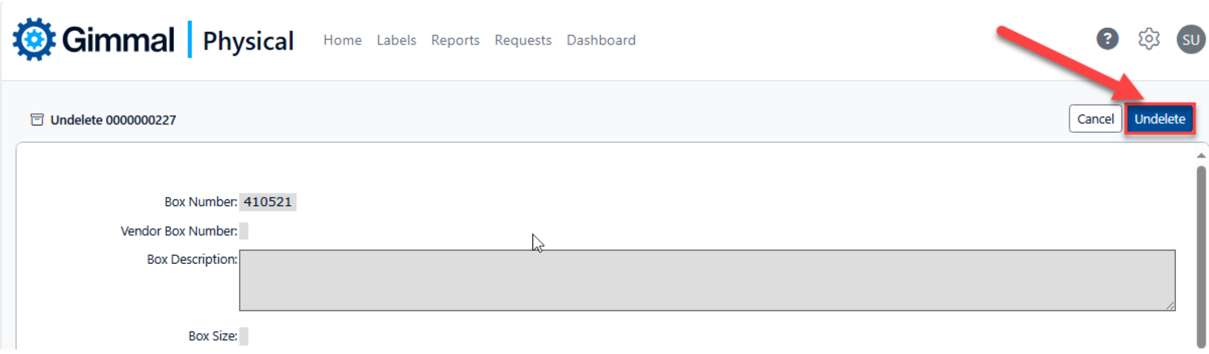
1.4.1.4.2.2 Restoring Deleted Records

Deleted records are still viewable in the application (displayed in red, italicized text), and can be restored. Users with the appropriate permissions for the item type can Undelete and Bulk Undelete deleted records.



Undelete a Single Record

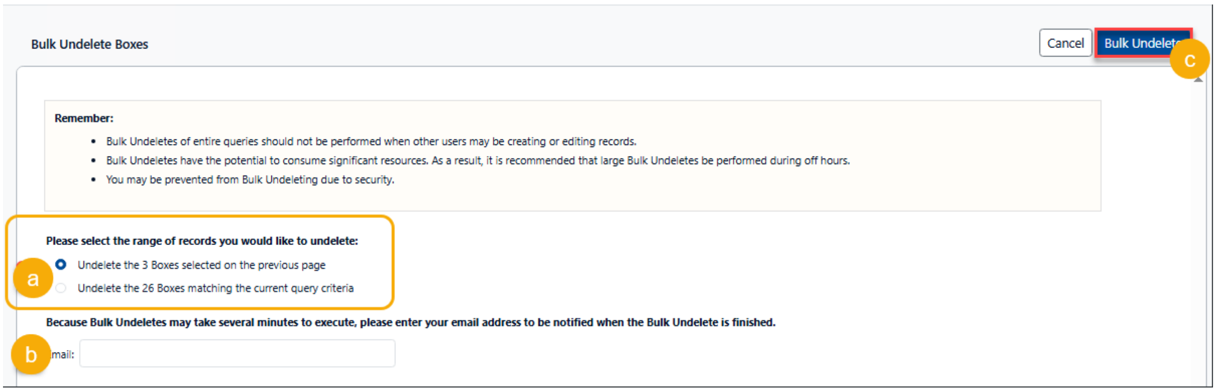
1. Find the desired item by using one of the search options (see page 95).
2. Select the item you wish to undelete.
3. Choose the UnDelete option from the 'Change' action button (B).
4. The UnDelete screen will open for review of the item to be deleted.
5. Click the 'Undelete' button on the Undelete screen to complete the reversal of the deletion.



Bulk Undelete

The Bulk Undelete action is designed to delete multiple records at once. (D)

1. Find the desired items by using one of the search options (see page 95).
2. Select the items you wish to delete.
3. Select Bulk Delete from the menu (D). This opens the Bulk Delete screen (see screenshot below)
4. Choose whether to delete all the items in the current query or just the ones that were selected. (a)
5. Optionally, enter an email address to receive a notification that the bulk delete has completed. (b)
6. Click the 'Bulk Delete' button to begin the bulk delete process. (c)



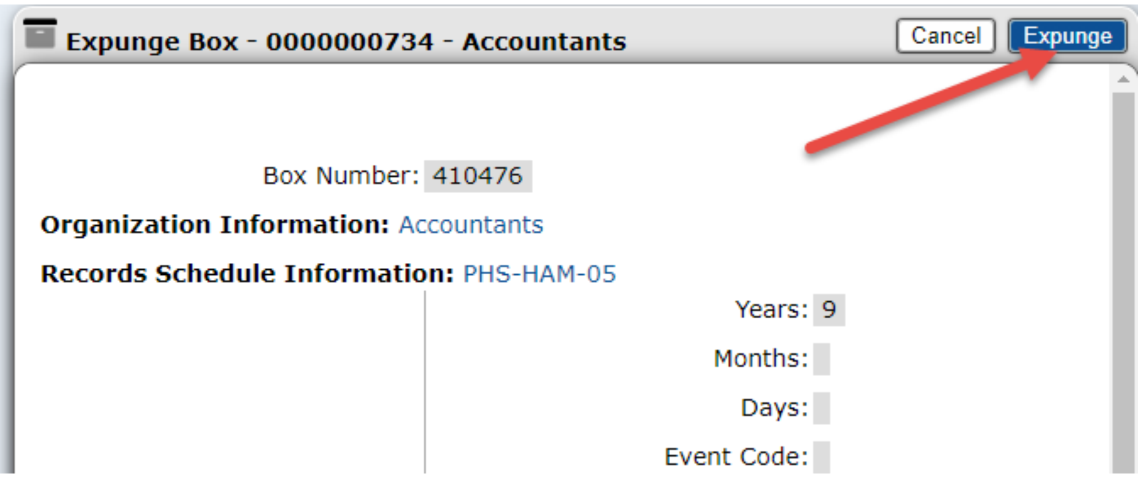
1.4.1.4.2.3 Expunge

Deleted records can still be viewed in the application (displayed in red, italicized text) and can be undeleted. However, expunged records are removed from the application **permanently.** There is no undo capability once a record has been expunged. Only users with the appropriate permissions for the item type can Expunge and Bulk Expunge records.

⚠ Use the Expunge option with care. Once the expunge has been completed, these records **cannot be restored** from within Gimmal Physical.

Expunge a Single Item

1. Find the desired item by using one of the search options (see page 95).
2. Choose the Expunge option from the 'Change' action button (E).
3. The Expunge Item screen will open for review of the item to be deleted.
4. Click the 'Expunge ' button on the Expunge Item screen to complete the deletion.

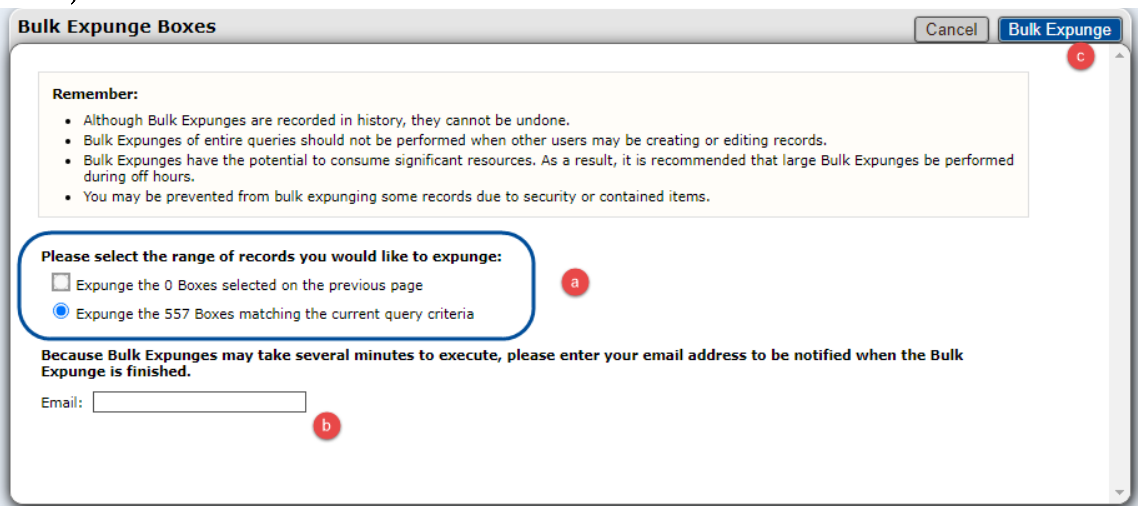


Only one record at a time can be deleted using the Expunge option. Bulk Expunge (see below) can be used for expunging multiple records.

Bulk Expunge

Bulk expunge allows users with the appropriate permissions to permanently remove multiple records at once. To expunge an item in Gimmal Physical:

1. Find the desired items by using one of the search options (see page 95).
2. Select Bulk Expunge from the menu (F). This opens the Bulk Expunge screen (see screenshot below).



3. Choose whether to Bulk Expunge all the items in the current query, or just the ones that were selected. (a)
4. Enter an email address where to receive a notification that the bulk expunge has completed. (b)
5. Click the ‘Bulk Expunge’ button to begin the bulk expunge process. (c)

Please review the Disposition in Gimmal Physical (see page 110) for information related to retention, disposition, and automated deletions. (G)

1.4.1.4.3 Requesting Items

Requesting provides a way for end-users to request either pick-up or delivery of items.

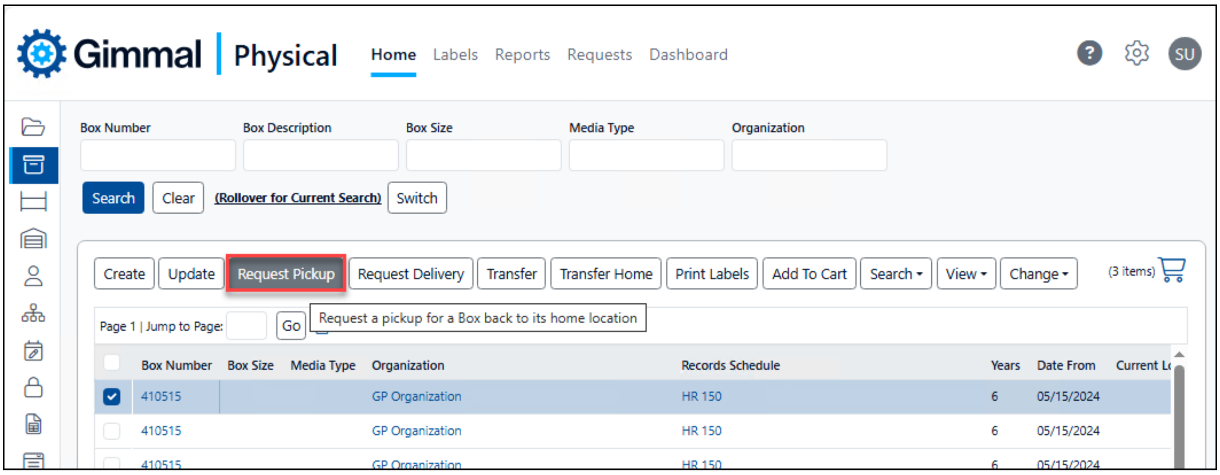
This topic has an interactive tutorial. To view it, click here[11].

1.4.1.4.3.1 Request Items for Pickup

A Pickup Request (sometimes known as a ‘Refile Request’) is used for adding new boxes to a permanent location or returning boxes to their Home Location.

To submit a Pickup Request:

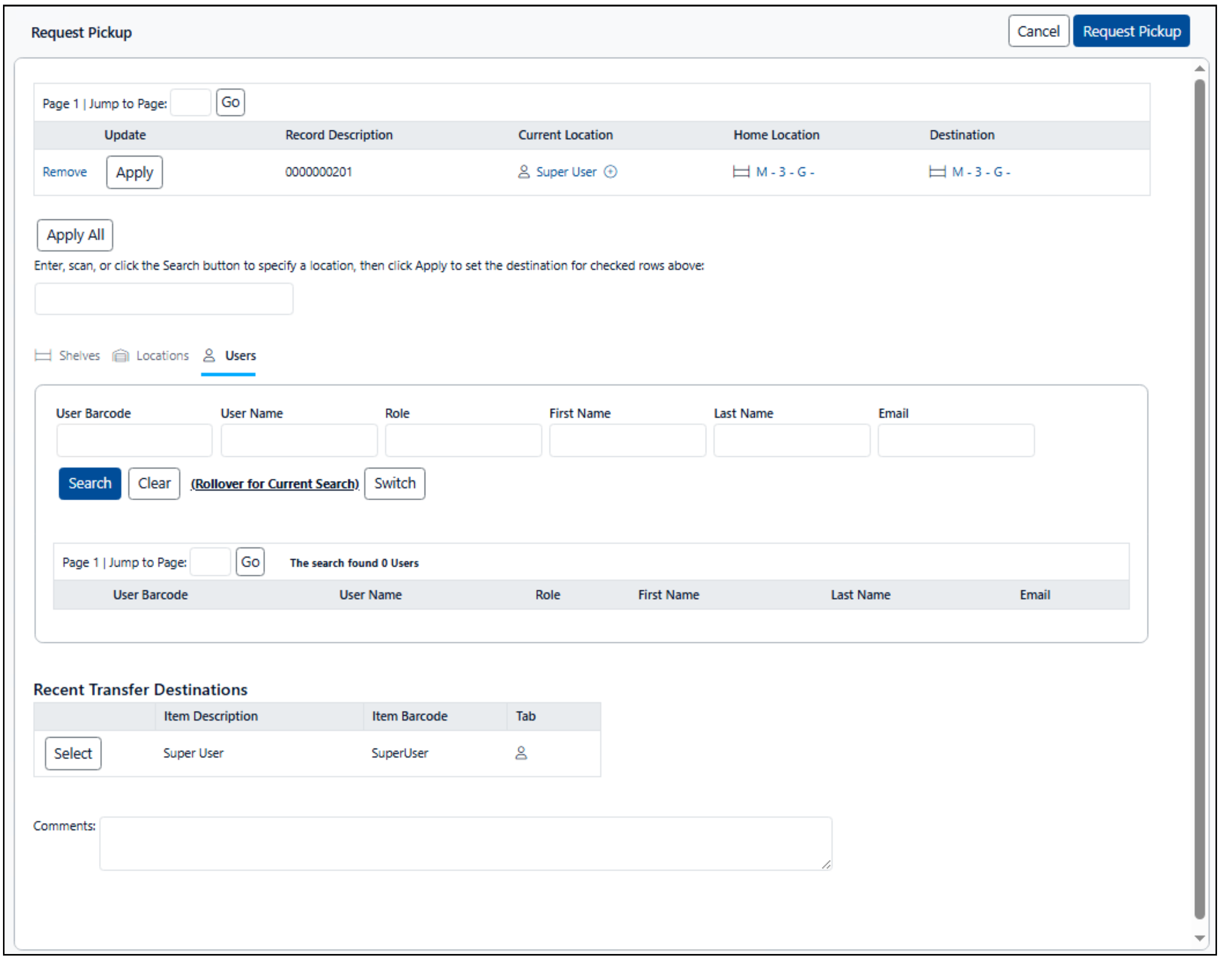
1. Locate the desired item(s) using your preferred search techniques.
2. Check the box for each desired item and click **Request Pickup**.
   a. Alternatively, you can click **Add To Cart** if a single search is not sufficient. In your cart, check the box for each desired item and click **Request Pickup**. See for more information.



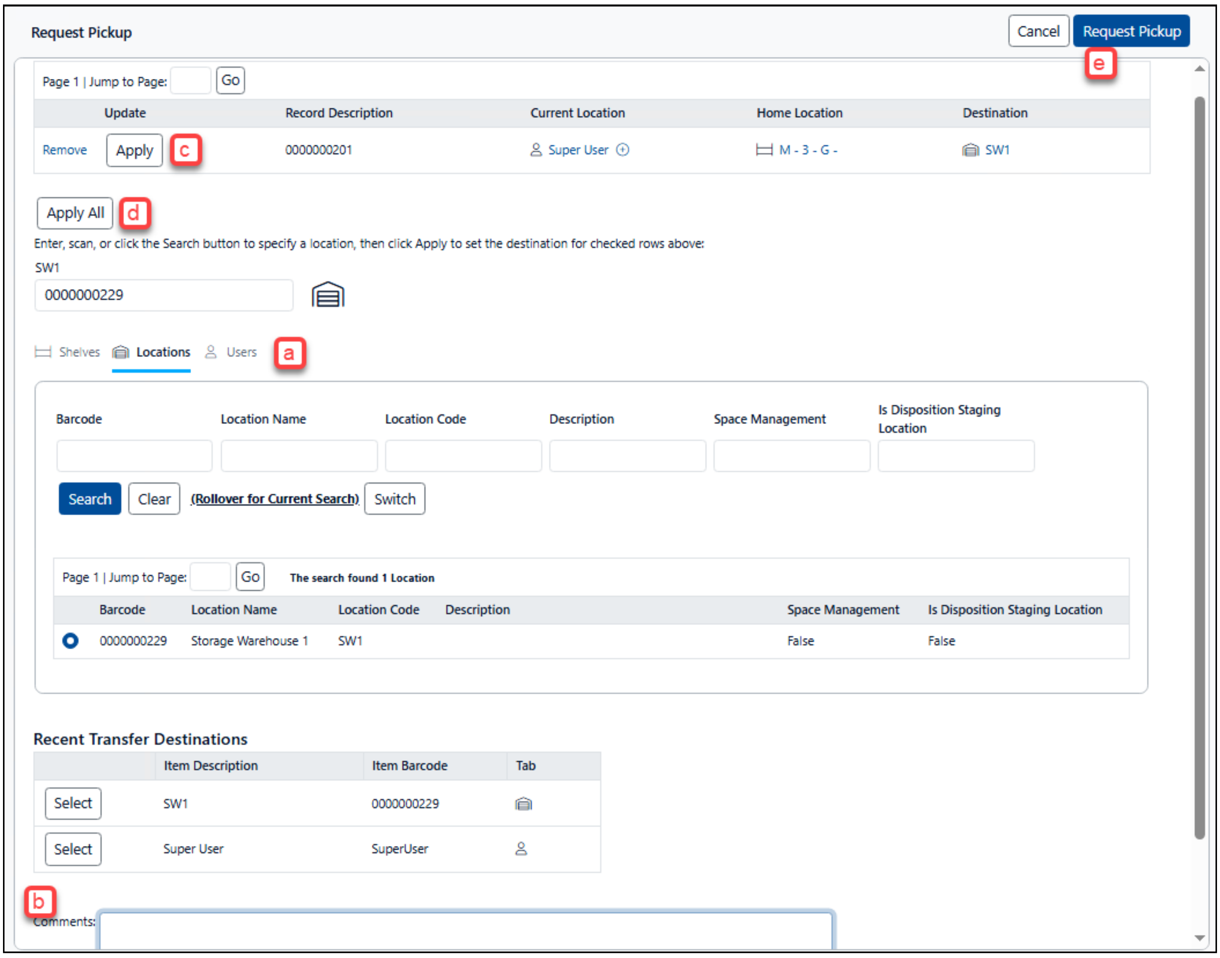
13 Requesting pickup for a box

11. https://gimmal.navattic.com/gl10s6b

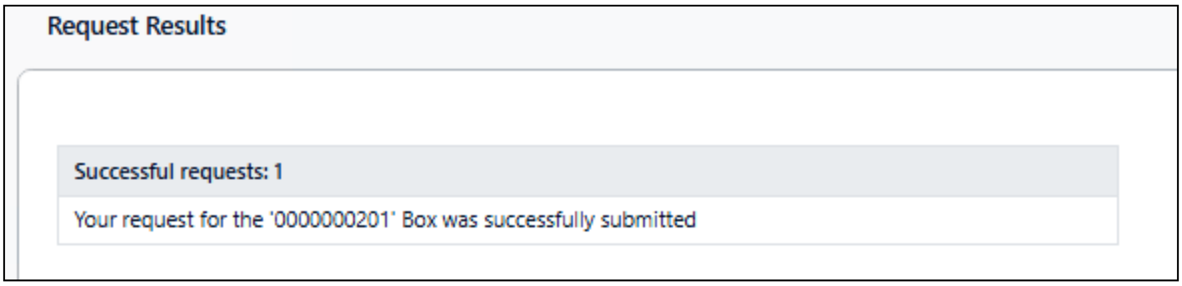
3. The **Request Pickup** page displays



4. Perform the following steps to complete the request:
    a. Search for, and select, the destination you want the pickup items to be taken to. Note:
        i. Make sure you have selected the correct tab (i.e. Shelves, Locations, Users).
        ii. The barcode of the selected destination displays in the text box above the tabs.
        iii. Depending on your application preferences, a default destination may already be specified (this can be changed in Preferences, as needed).
    b. Enter any comments that need to be provided for the item history.
    c. Click **Apply** to update the Destination for the requested item (see below). Note that the **Record Description** is the Quick Description for the requested item(s).
    d. If multiple items are requested, you can update the Destination for all of them by clicking **Apply All**.
    e. Finally, click **Request Pickup** to submit the request for review.



5. Click **Ok** to dismiss the **Request Results** page

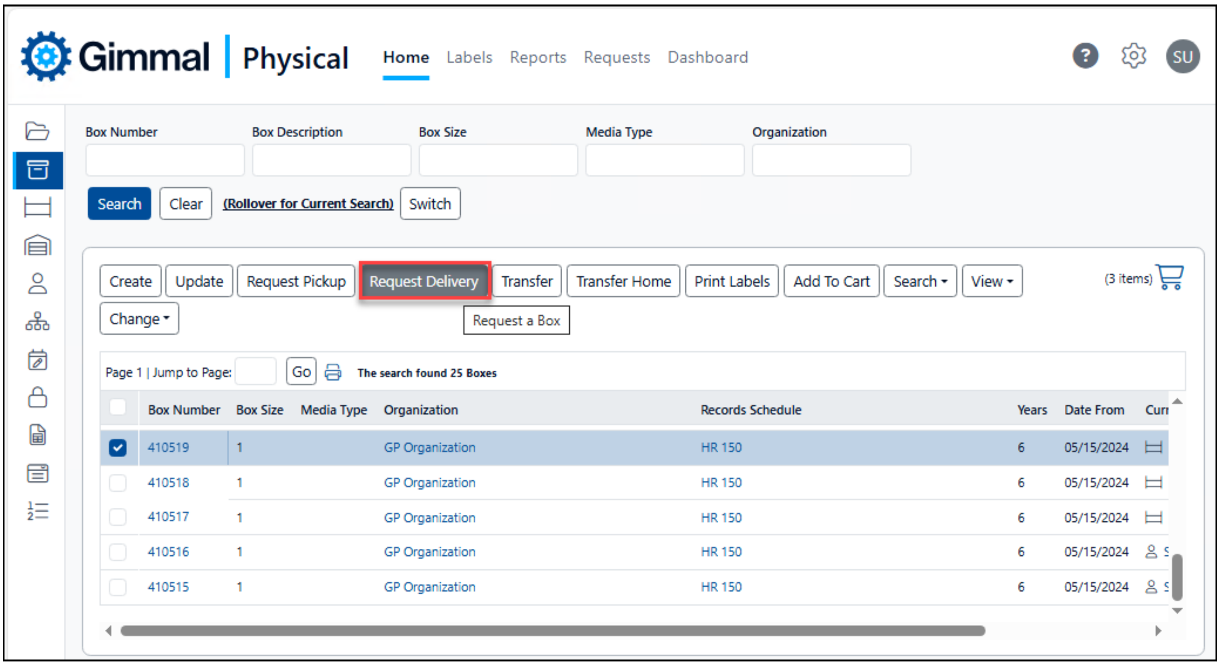


14 Request successfully submitted

1.4.1.4.3.2 Request Items for Delivery

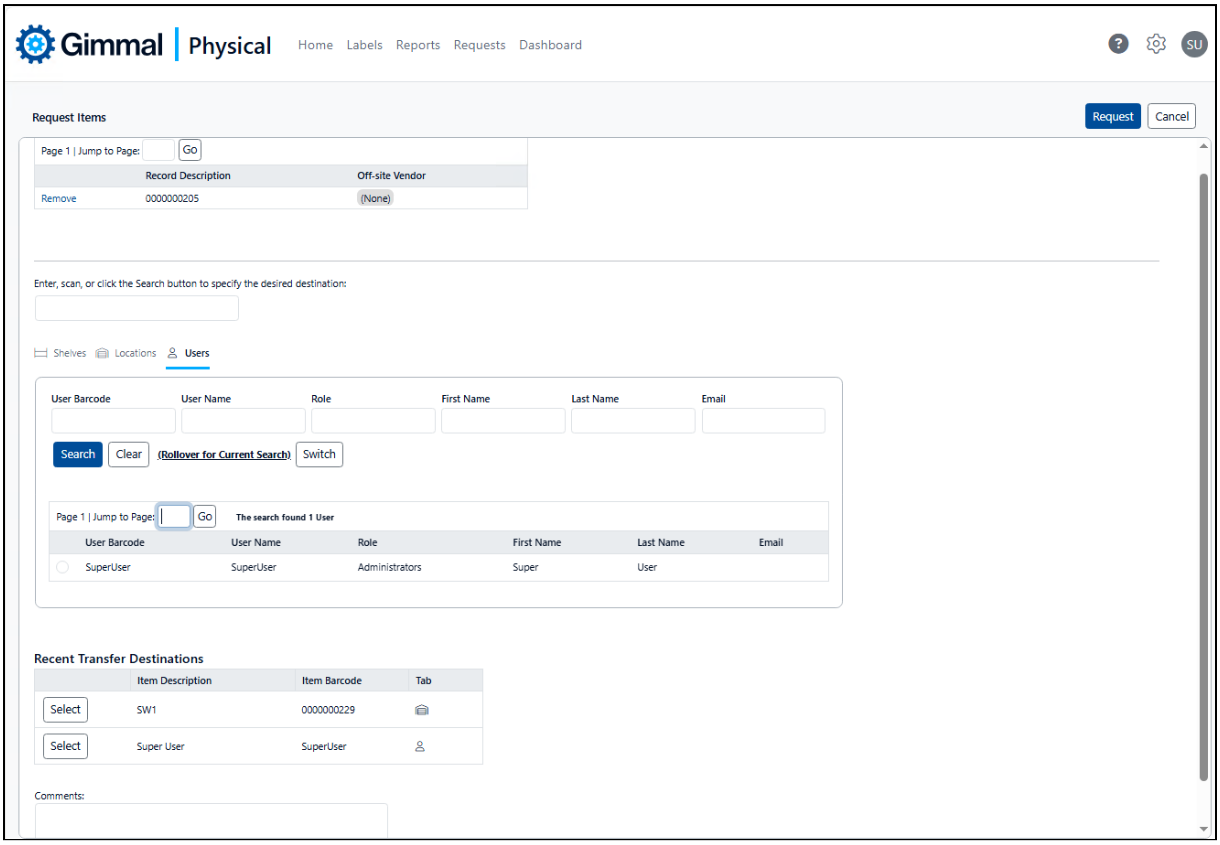
Delivery Requests are typically initiated to request an item to be transferred to a specific user's location. To submit a delivery request:

1. Locate the desired item(s) using your preferred search techniques.
2. Check the box for each desired item and click **Request Delivery**.
    a. Alternatively, you can click **Add To Cart** if a single search is not sufficient. In your cart, check the box for each desired item and click **Request Delivery**. See for more information.



15 Requesting delivery of a box

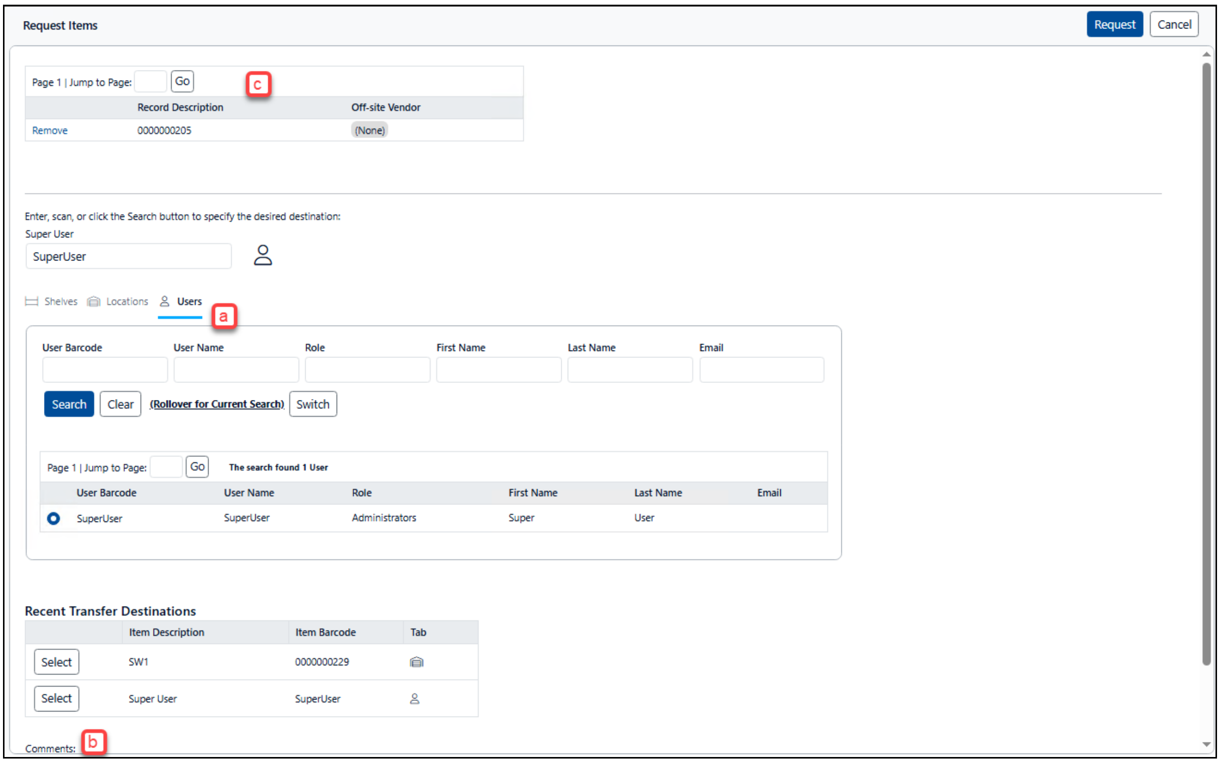
3. The **Request Items** page displays



4. Perform the following steps to complete the request:
    a. Search for, and select, the destination you want the requested item(s) delivered to.

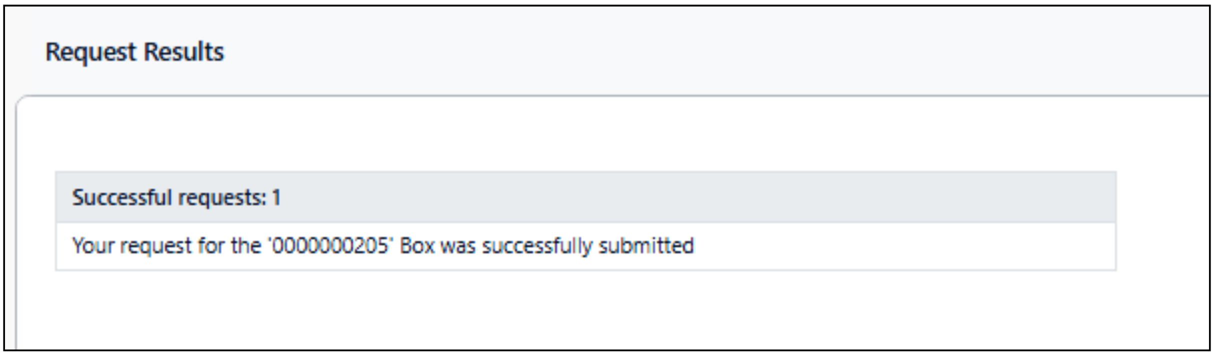
i. Make sure you have selected the correct tab (i.e. Shelves, Locations, Users).
ii. The barcode of the selected destination displays in the text box above the tabs.
iii. Depending on your application preferences, a default destination may already be specified (this can be changed in Preferences, as needed).

b. Enter any comments that need to be provided for the item history.
c. Note that the **Record Description** is the Quick Description for the requested item(s).
d. Finally, click **Request** to submit the request for review.



16 Delivery request ready to submit

5. Click **Ok** to dismiss the **Request Results** page

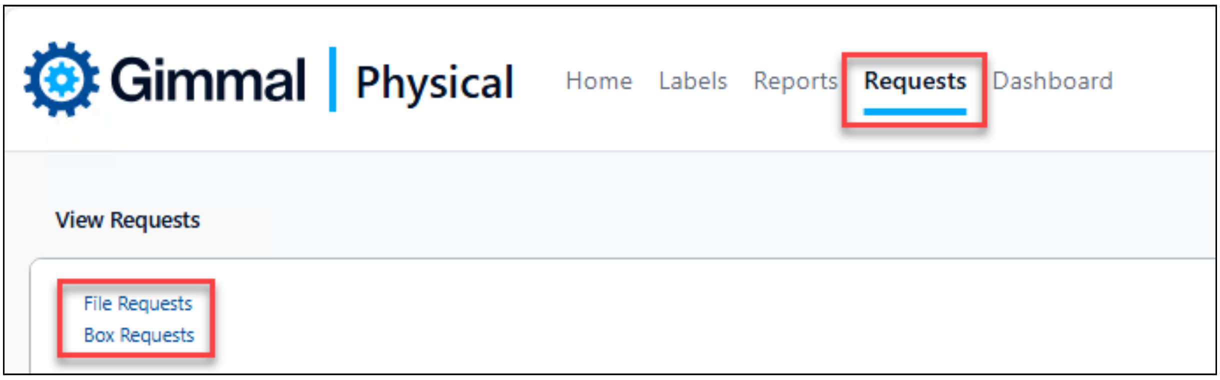


17 Request successfully submitted

1.4.1.4.3.3 Review Requests

When pickup and delivery requests are submitted, they are added to the Requests page (based on item type, i.e., Files or Boxes) to be reviewed, approved, and fulfilled by a user with sufficient privileges.

To review submitted requests click **Requests** in the navigation menu, then click the link for the desired item type. This displays the **View Requests** page. There will be links listed on this page for each type of item that can be requested. In this case, the File and Box Requests links are listed, but you may see others depending on your configuration.

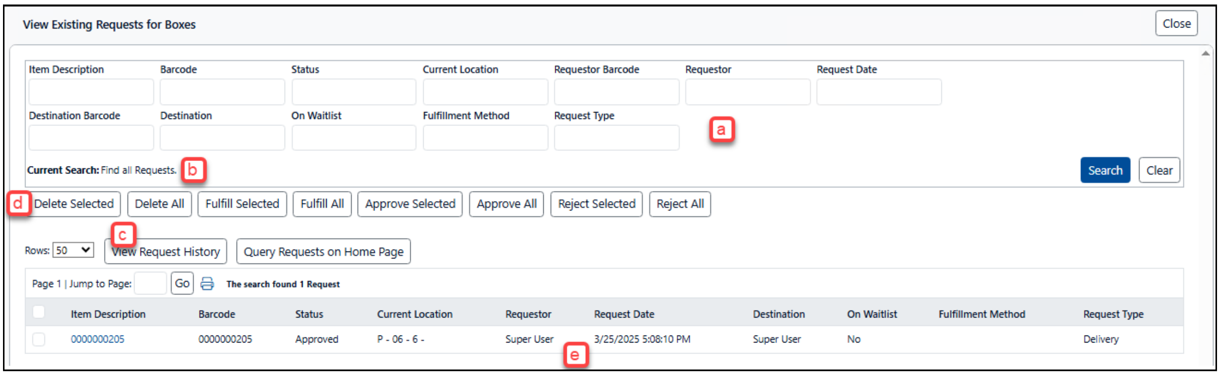


18 View Requests page

If enabled, the review and submitting of requests for items stored in Iron Mountain or O'Neil have to follow a different process. Please review the appropriate guide (Iron Mountain[12], O'Neil[13]) for more details.

View Existing Requests

The **View Existing Requests for Boxes** (or Files) page is where review, approval, and fulfillment of requests takes place. By default, Gimmal Physical displays all requests for which you have permission/access. If desired, this list can be reduced by using the Quick Search fields above the grid.



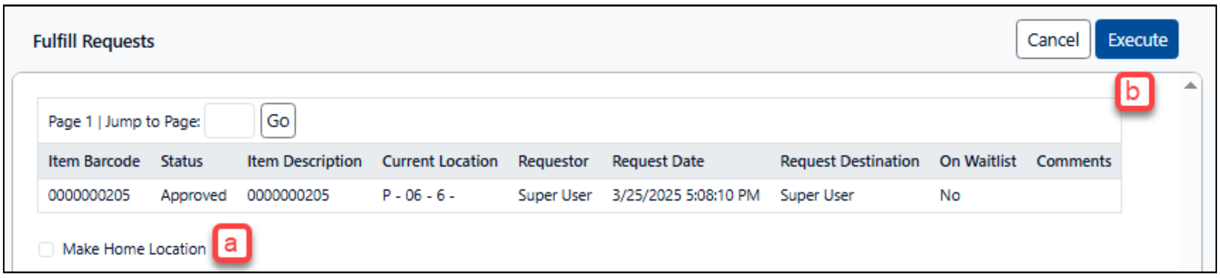
This page includes the following:

12. https://docs.gimmal.com/gp/user-guide-for-iron-mountain-integration
13. https://docs.gimmal.com/gp/user-guide-for-o-neil-bridge-integration

1. Quick Search **(a)**- Used to parse through the existing item requests and functions the same way as the Quick Search on the individual Item tabs, including the same search operators. Current Search **(b)** describes the last search that was executed. Clicking Search with no criteria entered will return all current requests (see note below). Clear simply removes all search criteria from the Quick Search fields.
2. View Request History **(c)** - Displays the **Request History** page where you can search through, and export, previous request entries.
3. Action buttons **(d)** - perform the indicated actions on selected, or all, requests.
    a. **Delete Selected/All**: Delete the selected request(s) or all requests
    b. **Fulfill Selected/All**: Fulfill the selected request(s) or all requests. Once fulfilled, requested items are automatically transferred to the requested destination, and the request itself is deleted from the Review Existing Requests page.
    c. **Approve Selected/All**: Approve the selected request(s) or all requests. Depending on your application preferences, this may not be applicable (i.e. requests are automatically approved)
    d. **Reject Selected/All**: Reject the selected request(s) or all requests
4. Requests/Search results **(e)** - Existing item requests. The fields are:
    - **Item Description**: Quick description of the requested item.
    - **Barcode**: Barcode of the requested items.
    - **Status**: Approval status of the request. Requests can be auto-approved based on your preferences. See for more information.
    - **Current Location**: Current Location of the requested item.
    - **Requestor**: Who actually submitted the request.
    - **Request Date**: The date and time the request was created.
    - **Destination**: Where is the requested item going to.
    - **On Waitlist**: Item requests are automatically added to the waitlist if there is already a request for the item or if the item is not at its Home Location. When an item is placed on the waitlist because it is checked out to a user, an email notification (if your system notifications are so configured) is sent to that person. Once all prior requests for this item have been fulfilled/it is returned to its Home Location, the request is removed from the waitlist and ready to be fulfilled.
    - **Fulfillment Method**: How this request should be fulfilled (specified during the initial request submission)
    - **Request Type**: Type of item request, i.e. Pickup or Delivery

Fulfilling requests

Clicking **Fulfill Selected** or **Select All** displays the **Fulfill Requests** page. Checking the box **Make Home Location (a)**, sets the destination as the item’s Home Location. Click **Execute (b)**to fulfill the request.



Only non-waitlisted requests will appear on the Standard Picklist Reports[14] (See Reports[15] for additional information). All current requests, including those that have been waitlisted, can be viewed on the **View Existing Requests** page.

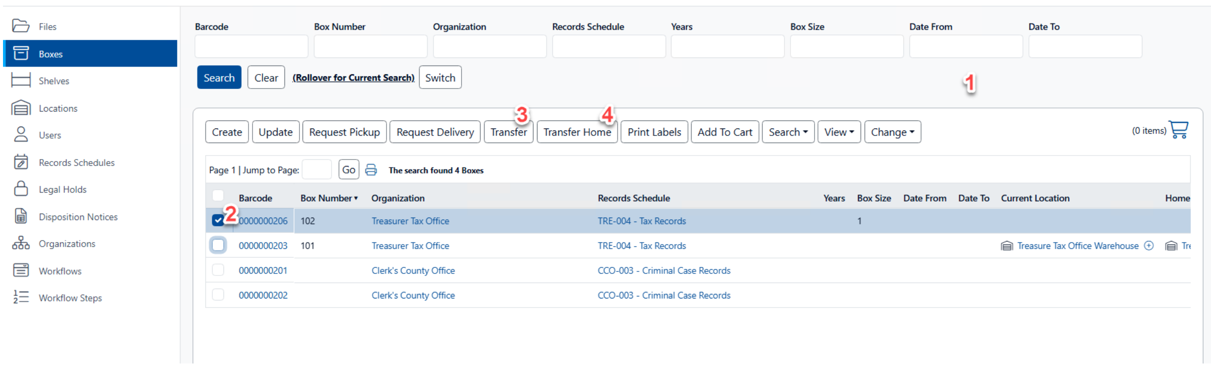
Visibility of Requests

1. Organizational Security/Security Exclude - Organizational security will control the visibility of requests based on the item's and User's associated organizations. Users with Security Exclude enabled, regardless of their role, can see all requests regardless of the item's associated Organization.
2. Hub Locations - if hub locations are used in your application (contact Gimmal Support or your Gimmal Account Manager), Users processing requests will only see requests for items associated with the same hub location with which the user is also associated, as well as requests for items not associated with a hub location. In addition, Users processing requests will also see requests for items not associated with any hub location.

1.4.1.4.4 Transferring Records

***This topic has an interactive tutorial. To view this tutorial,* click here[16].**

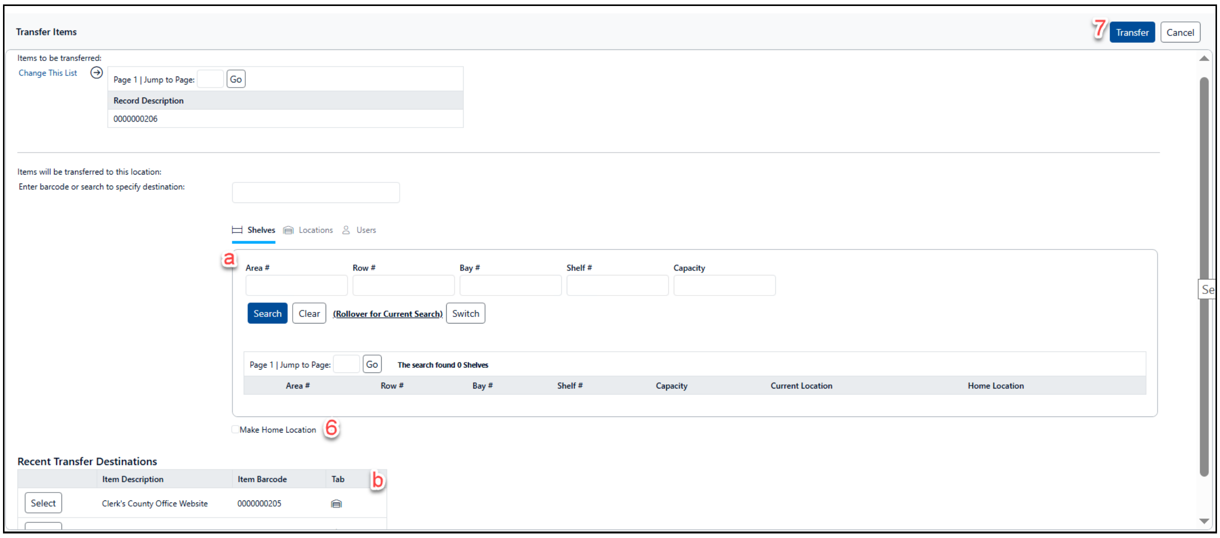
There are several methods for transferring records via the Gimmal Physical interface.



Use the following option to transfer records in Gimmal Physical:

14. https://gimmal.atlassian.net/wiki/spaces/PHHG/pages/140476430/Picklist+Report
15. https://gimmal.atlassian.net/wiki/spaces/PHHG/pages/140083269/Reports+Overview
16. https://gimmal.navattic.com/hf10r69

1. Locate the desired items using one of the integrated search options.
2. For each item you wish to transfer, click the associated checkbox.
3. Click the ‘Transfer’ button. This opens the ‘Transfer Items’ screen (see step 5 below)
   Note: An alternative is to use the ‘Transfer Home’ option which will automatically use the home destination for the transfer. If used, skip to Step 6.
4. Specify the Transfer Destination. This may be done by:
   a. Selecting the destination from the list of recently used destinations,
   b. Clicking on the Search button and selecting the desired destination from an available list (e.g. Shelves, Locations, Users)
5. Clicking the ‘Make Home Location’ option will update the Home Location value for the selected items being transferred to the option chosen for the transfer location.
6. Click the Transfer button to process the transfer.



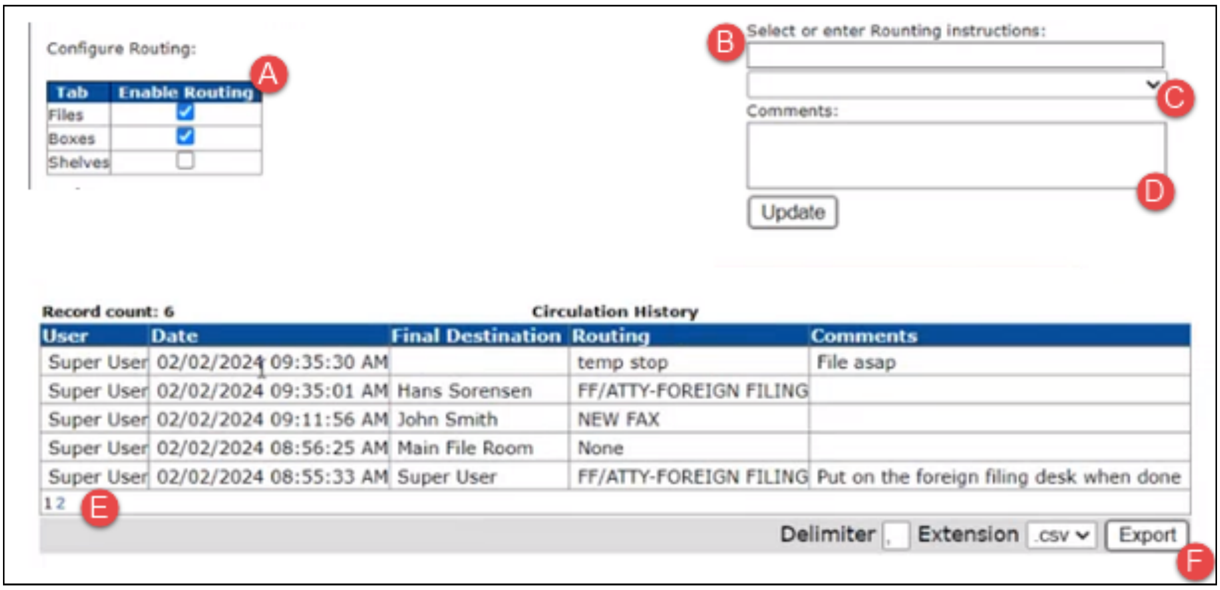
Transfers can also be performed using a tethered (see page 174)or portable (see page 151) barcode scanner.

1.4.1.4.4.1 Circulation Routing & History

Users seeking to store and audit more granular details when transferring items can enable Circulation Routing. This can be helpful for recording additional steps taken between locations or adding extra notes for a given transfer.

- This functionality is not available in versions of Gimmal Physical older than 3.15.

- To enable this functionality, admins with the appropriate permissions must first navigate to the Admin | Field Display - Advanced and choose ‘Enable Routing’ (A) for the requisite Tabs. This option is limited to items that can be transferred (e.g. Files or Boxes).



Circulation Routing

Once enabled, the Circulation Routing control (B) will appear on the Tabs chosen in the Advanced Field display. The control consists of three parts:

1. Routing information. This can be manually entered, or chosen from the drop down list. The dropdown list values are controlled via the List Values option on the Administration page.
2. Free form Comments can be added to give further detail to this transfer.
3. An ‘Update’ button which will save the information to the Circulation History.

When the Transfer button is clicked, the routing information and comments entered on this page will be stored as part of the circulation history for this item.

The list values for the routing can be added at *Admin | Data | List Values.*

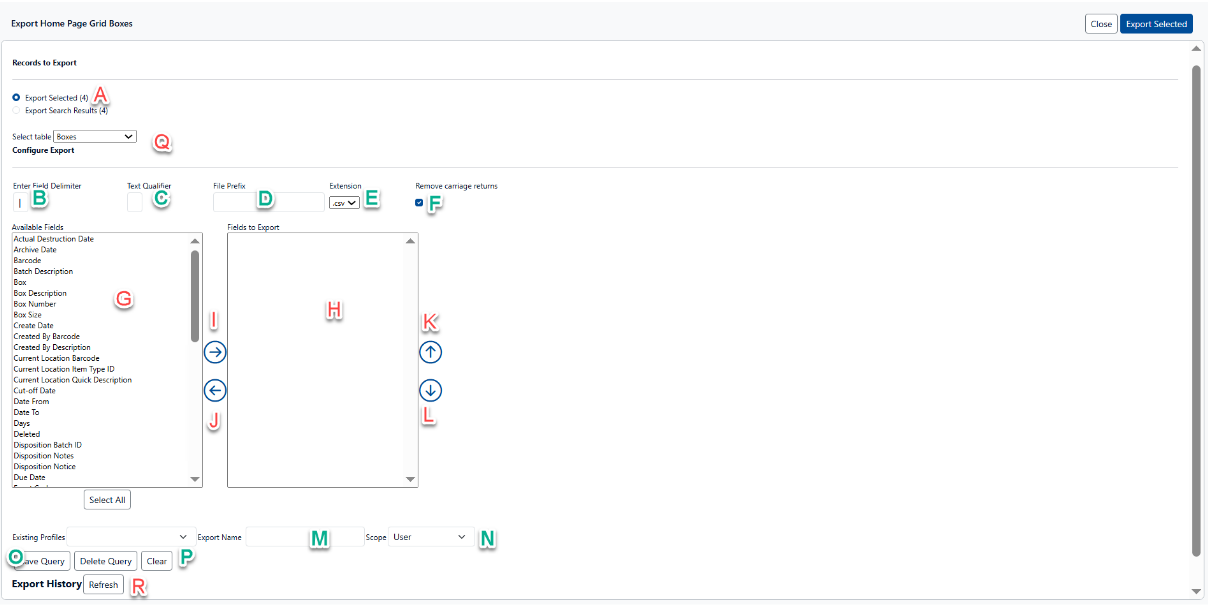
Circulation History

Circulation history reflects all the routing entries that have been assigned for a given record. It is visible only on the View page for that record (E). The Circulation History table is paginated showing five records on a screen. Click the page number links to move between pages. Records with the most recent transfer are shown at the top of the list.

The Circulation History for a given record can be exported using the ‘Export’ button (F). Users can choose a delimiter which will separate the fields in the exported file as well as the format for export (.csv or .txt)

1.4.1.4.5 Exporting

Gimmal Physical provides options for records displayed in any home page grid to be exported to an external file.



> Not all features are available in older versions of Gimmal Physical. Please contact support at support@gimmal.com[17] for any questions related to exporting in versions 3.14 and below.

1.4.1.4.5.1 Create a New Export

1. Click on the ‘Export' Action Button after finding the items you would like to include in the file. This opens the 'Export Home Page Grid' screen for that tab.
2. Choose which records you would like to export (A):
    a. ‘Export Selected’ will export only the items whose checkbox was selected on the Home Page grid.
    b. ‘Export Search Results’ will export all the results of the query whether they are selected or not.
3. Configure the Export format:
    a. If desired, enter a field delimiter (B). Leave this field blank to use the system defaults.
    b. If needed, enter a text qualifier (C). Leave this field blank for system defaults (suggested).

17. mailto:support@gimmal.com

   c. The created file will be given a system generated name, however, a prefix (D) can be added to the file name by entering text in this field.
   d. Choose the file type (E) for export. Note: .CSV can be used with spreadsheet tools such as Excel
   e. The 'Remove carriage returns' option (F) is on by default but may be disabled for troubleshooting.
4. Manage the fields to export:
   a. Selecting the chosen field from the list of fields available for export (G) and clicking the > arrow (I). This will put the field name in the Export fields list (H).
   b. To remove a field from the Export list (H), select the field and choose the **<** arrow (J) to move it back to the Available Fields list (G).
   c. To change the order, select the field and use the up (K) and down (L) arrows to maneuver the selected field.
5. Click on the 'Export Selected' button.

- It may take a few minutes for the new export file to appear in the 'Available Exports' list (R).
- The 'Clear' button (P) can be used at any time to reset all options.
- The 'Select table' drop down (Q) is only used when exporting data from many to many controls. The default value is the name of the tab.

Exporting data from Many to Many controls

Items in a many-to-many relationship (e.g. Users/Organizations) require an extra step in choosing the correct table.

1. Follow the steps above, however, after choosing the configuration options (Step 3), you must select the required table from the 'Select table' dropdown (Q). This will add the available many to many relationship fields to the Available Fields list (G) for this export file.
2. Continue with the configuration as noted in the steps above.

An export which includes a many-to-many relationship will have one record per line for each many to many relationship, e.g.

- Box 1 | Type A
- Box 1 | Type B
- Box 1 | Type C
- Box 2 | Type A
- Box 2 | Type D

1.4.1.4.5.2 Save an Export to a Profile

You can save the configuration of an export to a profile for future use.

1. Enter the export details as listed in the 'Create a New Export' section above.
2. Enter the 'Export Name' (M) by which this export profile will be known.
3. With the proper permissions, a Scope can be selected from the 'Scope' dropdown list (N) to determine who can see this profile.
   a. User - only the logged in user can see this export profile
   b. Role - all members of the role of the logged in user can see this export profile
   c. System - all users can see this export profile
4. Click on the 'Save Query' option to save the profile (O).

1.4.1.4.5.3 Using an Existing Export Profile

To use a profile that has already been created:

1. Click on the 'Export' Action Button from the Home Page Grid to open the Export Home Page Grid screen for that tab.
2. Choose the existing export profile from the 'Existing Profile' dropdown list.
3. Verify the options selected.
4. Click on the 'Save Query' option to save the profile (O).

1.4.1.4.5.4 Removing an Existing Export Profile

With the proper permissions, you can remove an export profile from the list:

1. Click on the 'Export' Action Button from the Home Page Grid to open the Export Home Page Grid screen for that tab.
2. Choose the existing export profile from the 'Existing Profile' dropdown list.
3. Click on the 'Delete Query' button to remove the profile from the list.
4. Click 'OK' on the verification.
5. The profile will be removed from the list

1.4.1.4.5.5 Available Exports

The list of available exports (R) shows the files which have been exported for this particular grid.

1. The 'Delete' link will remove the file
2. The 'Created Date' is the date the export was created
3. The 'File Name' provides a clickable link to open or download the selected file.

> Depending on the volume of records being exported, it may take a while for an export file to appear in this list. Clicking 'Refresh' will update the list with recent entries.

1.4.1.5 Managing Labels

Gimmal Physical has several options to help manage and print labels.

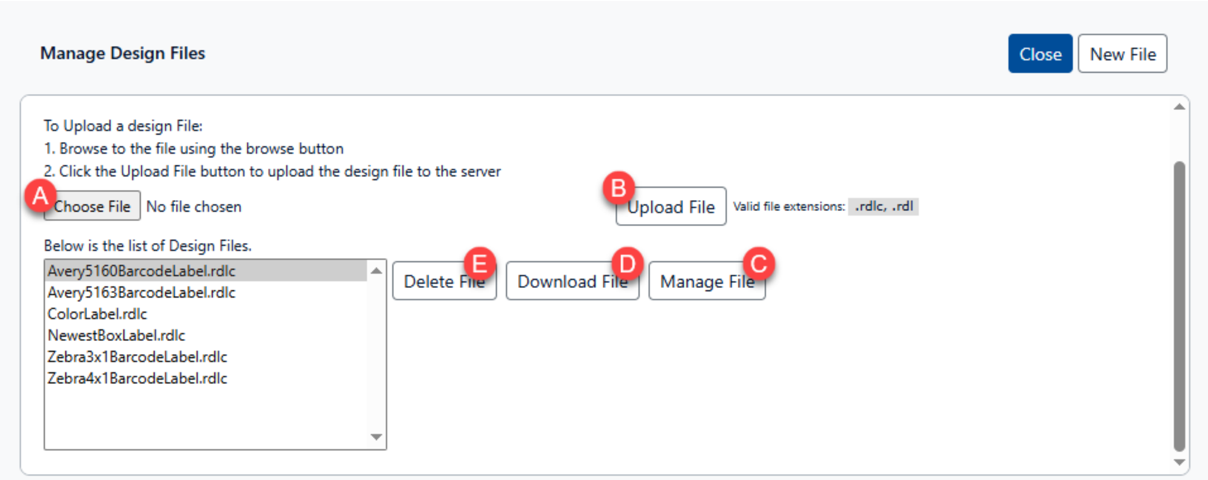
This topic has an interactive tutorial. To view this tutorial, click here[18].

- Printing Labels (see page 92)
- Label Queues (see page 93)

1.4.1.5.1 Administration Options

Before you can start using labels, you will need to design and designate the labels you will be using within Gimmal Physical. To do so, navigate to the Admin settings (via the gear icon) under the Configuration section.

1.4.1.5.1.1 Label Design Files



Existing label design files can be managed and new label designs added by lclickingthe Label Design Files link from the Admin page.

Labels are designed using Microsoft Report Builder, a separate download[19] from Microsoft.

Upload a New Label Design File

1. Click the ‘Choose File’ button (A) to select the Label Design File from your desktop or server for use in Gimmal Physical. Once selected, the name of the file will appear to the right of the button, replacing the ‘No file chosen’ text.

18. https://gimmal.navattic.com/ql108di
19. https://www.microsoft.com/en-us/download/details.aspx?id=53613

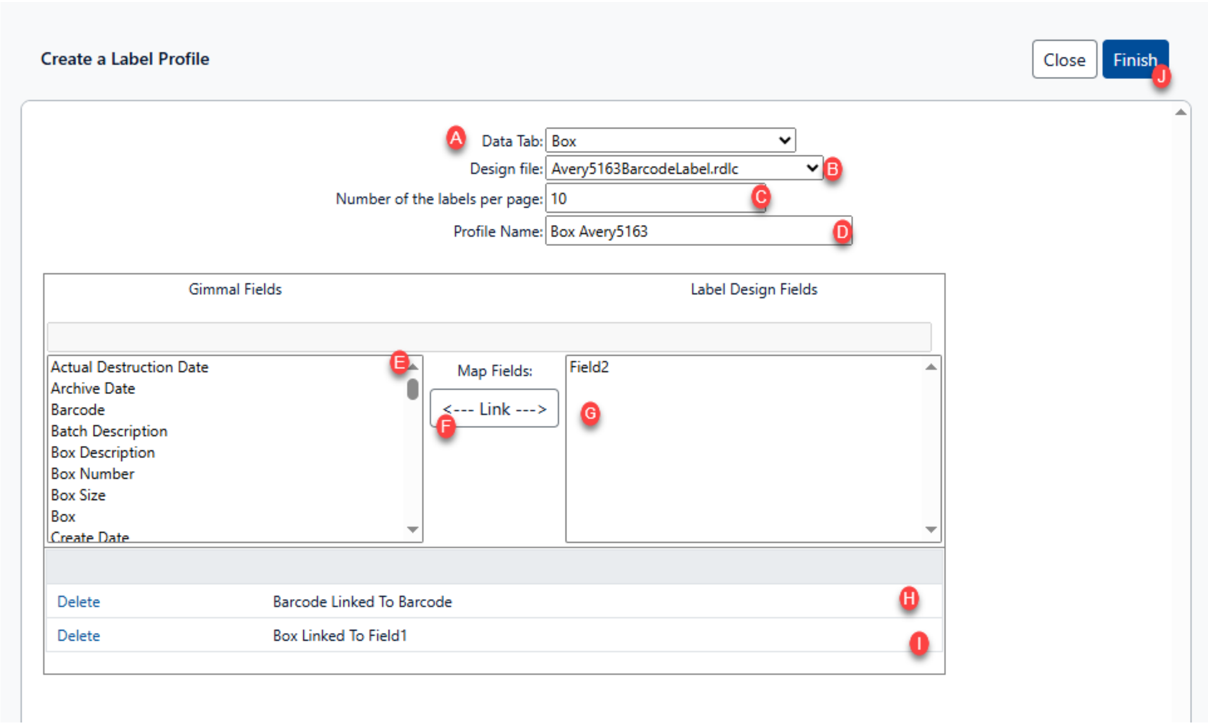
2. Click the 'Upload File' button (B) to bring the file into Gimmal Physical. It will now appear on the list of Design files that can be managed.

Other Options

- Click 'Manage File' (C) to open the 'Manage Label File' screen to manipulate the field assignments. You will use the Label Profile (see below) options to configure the data mapping between the fields in the label design files and the record data.
- Click 'Download File'(D) to download the selected Label Design File.
- Click 'Delete File' (E) to remove the selected Label Design File from the list.

1.4.1.5.1.2 Label Profiles

To configure the data mapping between the fields in the label design files and the record data, Label Profiles must be created for each Label Design File. You can have multiple Label Profiles defined. Each profile sets the mapping of record data to fields on the label.



The fields available will allow you to choose the exact mapping for the fields.

1. Choose the Tab (item type) whose fields will define the mapping. (A). Selecting the tab will populate the 'Gimmal Fields' list (E).
2. If not already selected, choose the design file from the list (B). This will populate the fields available for mapping from the Label Design (G).
3. Add the number of labels that should appear on the page (C).
4. Give this profile a unique name (D).
5. To link values
    a. Select a field from the Gimmal Fields list (E)

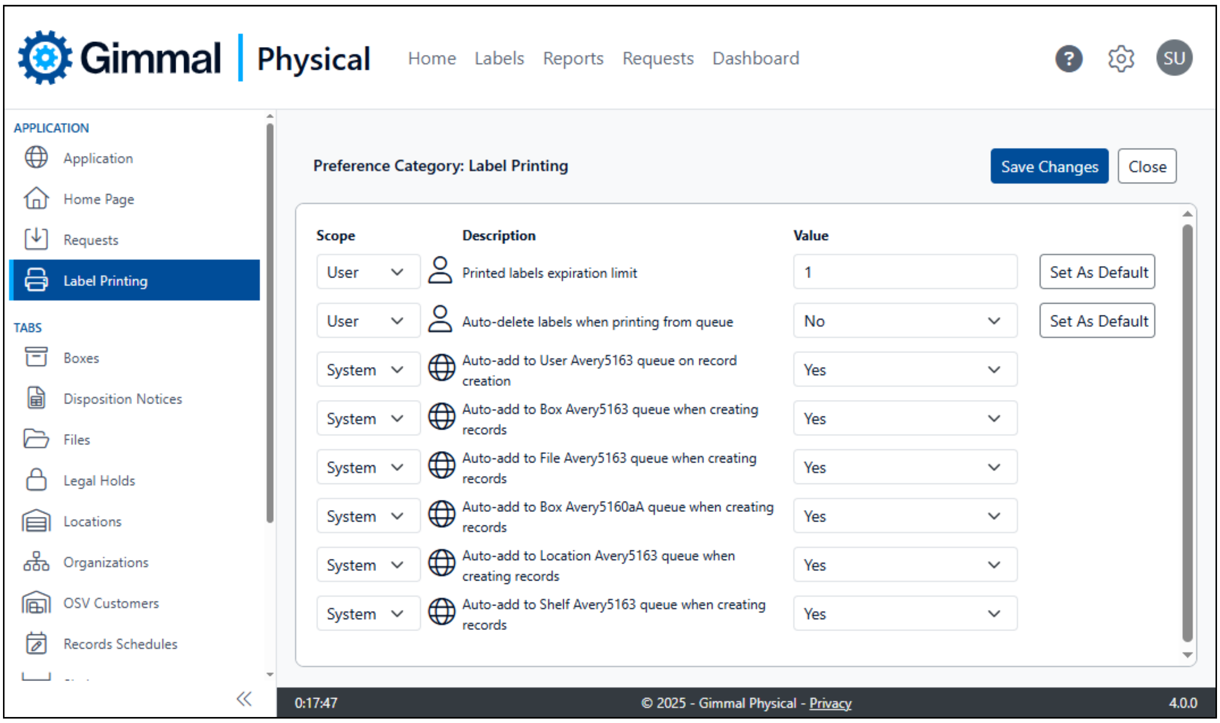
   b. Select the corresponding field from the Label Design Fields list (G).
   c. Click the Link button (F)
   d. The mapped value will disappear from the available fields in the Label design list (G).
6. The new mapping will appear below the field lists (H, I).
7. Use the 'Delete' link to remove a field mapping.
8. Click 'Finish' (J) to save the profile.

1.4.1.5.2 Label Printing Preferences

Preferences are found by clicking the gear icon and choosing 'Preferences'. ***Label Printing*** options are found under the *APPLICATION* section on the left-hand navigation menu. As with most preferences, you can set the scope to which the selected preference will apply

- User - affects only the logged in user
- Role - enables separate setting for each Role
- System - affects all Users of the system

> Workstation is a deprecated option, and should not be used with newer versions of Gimmal Physical



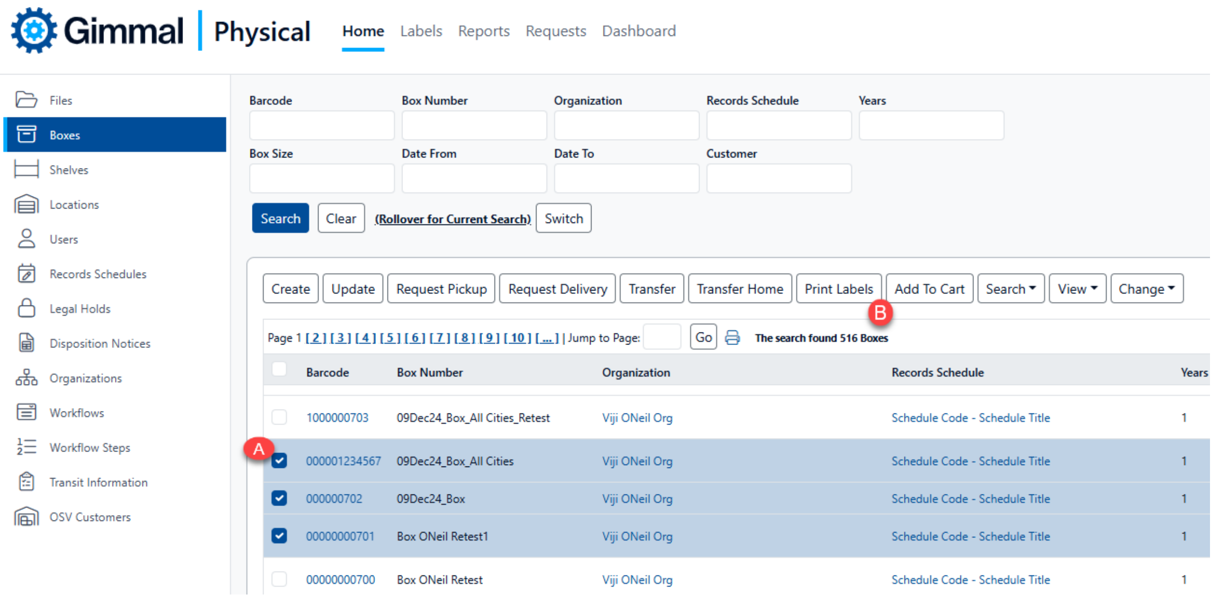
- *Print labels expiration time limit*
- *Auto-delete labels when printing from queue*: Option to automatically remove records from the designated queue after they are printed.

- The *Auto-Add* preferences can be set per label design type. This option determines whether a new record should be added to the corresponding label queue when it is created. The default is Yes.

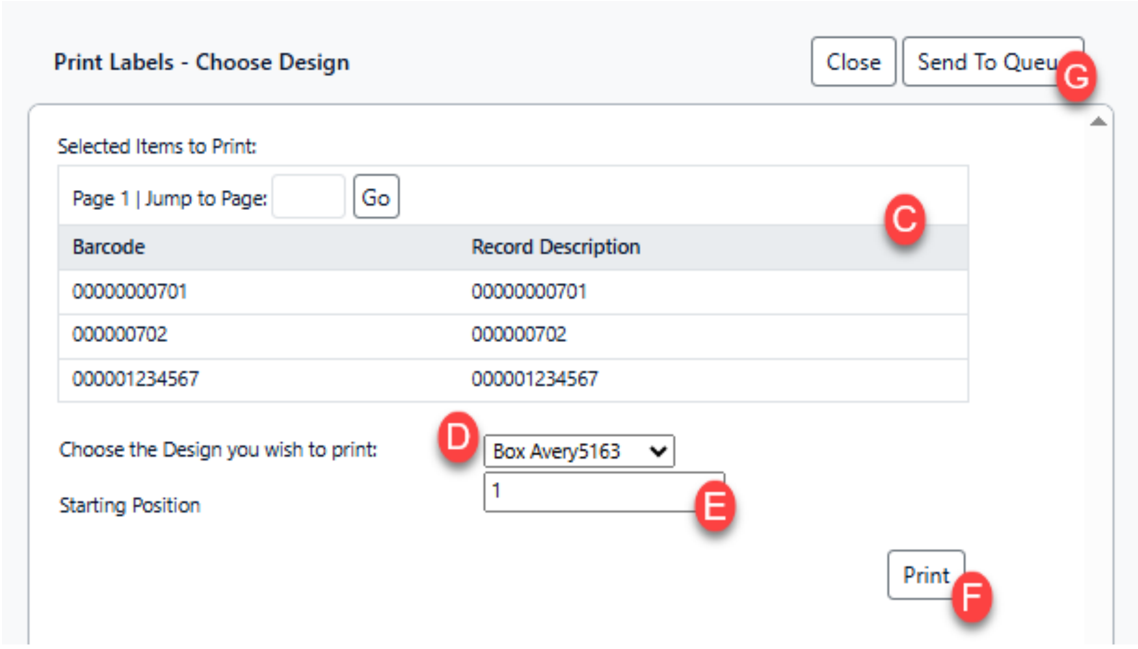
For more detail about queues, please see Label Queues (see page 93).

1.4.1.5.3 Printing Labels

Gimmal Physical supports the printing of both black and white as well as color-coded labels. To start printing labels, navigate to the tab that contains the items you'd like to print. We'll use Boxes for our example:



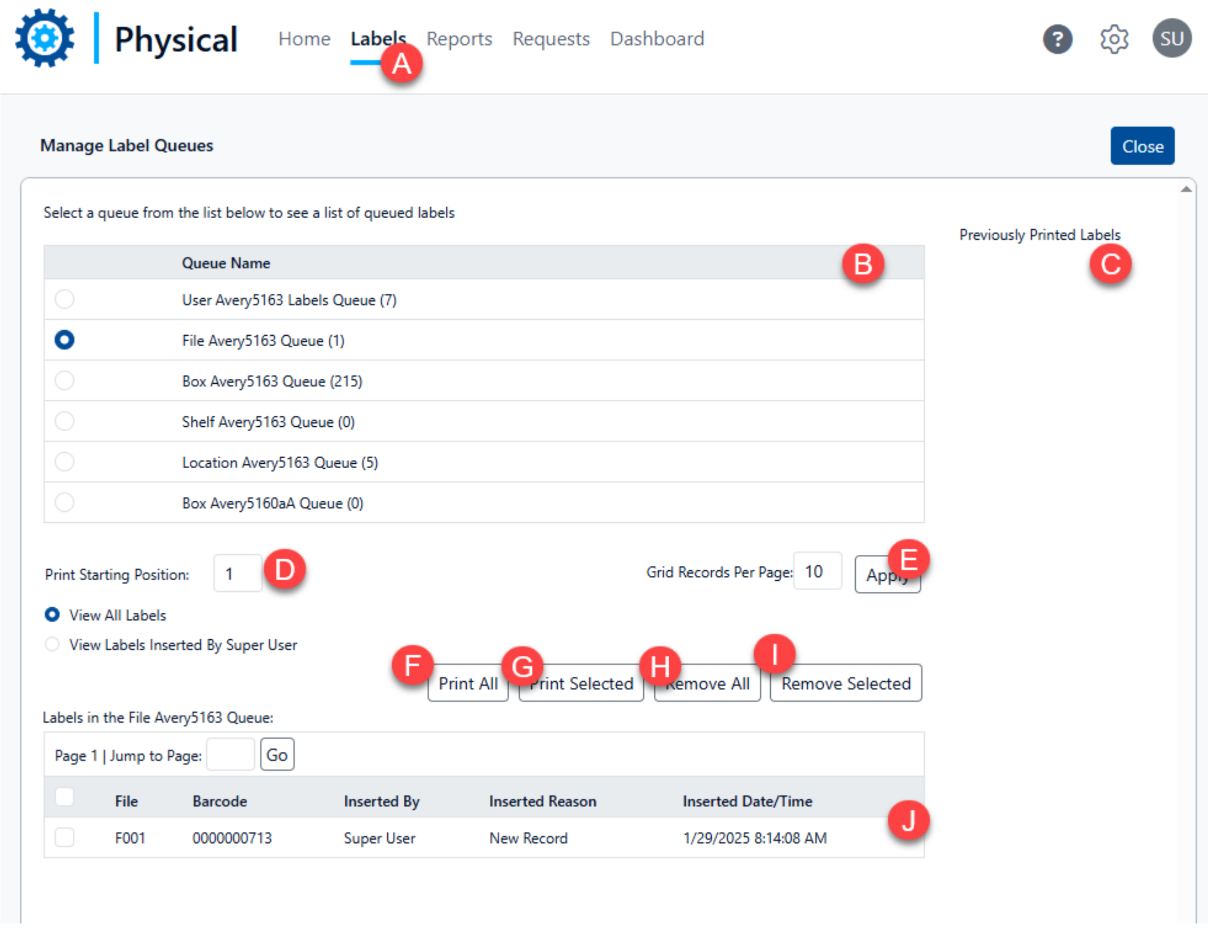
1. Search for the desired items that need print labels.
2. Select one or more items that need printed labels (A).
3. Choose 'Print Labels' from the Action bar (B).
4. The Print Labels 'Choose Design' screen opens:



a. The items we have selected will appear in the list of selected items to print (C).
b. Choose the design that you would like to print (D).
   Note: This list is limited by the type of content (Tab) that is supported.
c. You can change the record starting position (E)
d. There are two options for printing.
   i. Clicking 'Print' (F) prints the label right away. It opens a browser tab from which the labels may be sent to the desired printer to print right away.
   ii. Choosing 'Send to Queue' (G) print labels from auto-populated label queues. See Label Queues (see page 93) for more information.

1.4.1.5.4 Label Queues

Label queues help manage the printing of labels by consolidating many print requests into a single action per label design type, regardless of which user submitted the request. Queues can be populated automatically based on the Preference Setting set for the specific label design (see Managing Labels (see page 89)). Items can be printed from Label Queues by selecting ***Labels*** from the Navigation Menu (A).



- Selecting a queue (B) will show the records in that queue (J). Select one or more individual records or select the checkbox above the grid to select all records.
- If previously printed labels are present, they will show up on this page (C).
- Print Starting Position (referring to the starting position on the label stock) is set to 1 as default (D). However, it can be changed to any other number to change the starting position of printing.
- To view more records, change the number of 'Grid Records Per Page' and click Apply (E).
- Use the action buttons to choose how the records will be processed:
  - ***Print All*** (F) prints all records in the selected queue (B) regardless of selection status.
  - ***Print Selected*** (G) prints only the selected records in the queue list.
  - ***Remove All*** (H) takes all records out of the selected queue (B) regardless of selection status.
  - ***Remove Selected*** (I) takes just the selected records out of the queue.

You may configure records to be automatically removed after printing via a Preference (see page 89)setting.

1.4.1.6 Search Overview

This topic has an interactive tutorial. To view it, click here[20].

Gimmal Physical organizes information into tabs (e.g. Boxes Tab, Locations Tab, Users Tab, etc.). The contents of any of these tabs can be searched using several methods to help locate the exact data you seek.

Note: In our examples below we will be looking at Boxes, but the same information is valid for any item type.

Helpful Tip
Wildcard behavior can be controlled in Preferences | Application 'Wild Card Behavior'. Available options include:

- No Implied Wildcards: The terms entered must match the entire field to match. Wildcards must be explicitly added to the field if they need to be used.
- Auto Ending Wildcards: The % wildcard is implicitly used at the end of the entered term. This means the term will be found if it is at the beginning of the selected field value, regardless of how many characters are after it.
- Auto Beginning and Ending Wildcards: The % wildcard is implicitly used at the beginning and end of the entered term. This means any field containing the term that is entered will be returned. This is regardless of whether the additional characters are before or after the searched term in the field.

If you use wildcards as part of your search query, they will override any application-level wildcard preferences.

1.4.1.6.1 Searching

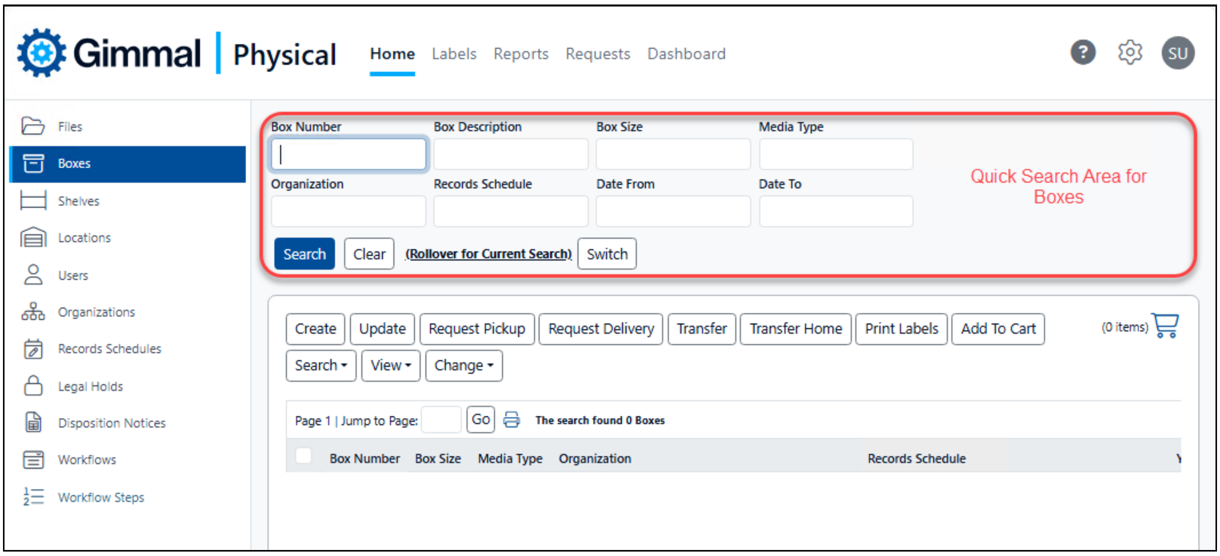
1.4.1.6.1.1 Quick Search

The default search view is the quickest and easiest way to search for items, especially if switched to the 'Full Text Search' option.

There is a Quick Search area for each type of item tracked in Gimmal Physical. It is located at the top of the appropriate tab. To access the quick search, first click on the tab you would like to search.

An example of the quick search area for a Gimmal Physical system tracking Boxes is below. You'll see there are several fields that are available for searching. These fields are configured by the System Administrator.

20. https://gimmal.navattic.com/yo201gc



To use the Quick Search, enter a value for the field or fields by which you would like to search. Click 'Enter' on your keyboard or click the 'Search' button to run the query.

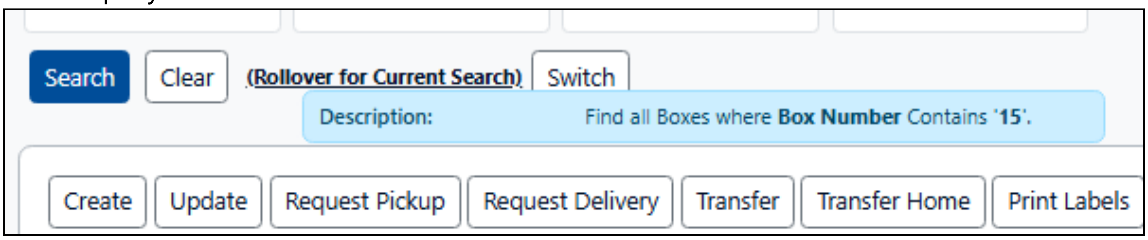
Note:

- Search results will include only those records where ALL search criteria match.
- The number of matching records will be displayed at the top of the results grid along with a pagination control when applicable.

Helpful Hint
Clicking 'Search' without entering any search criteria displays all the records that your security privileges permit you to see.

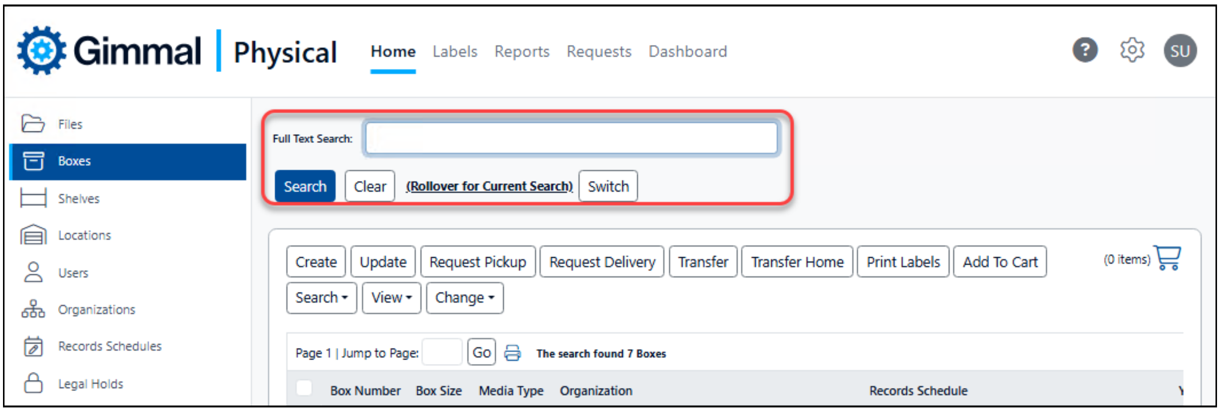
Other Buttons and links:

- **Clear** will remove all text from the Quick search fields and reset the result list to show no entries.
- **Switch** will change from Quick Search query by field search to the ***Full Text Search*** (See below)
- **(Rollover for Current Search)** hovering your mouse over this text will show a description of the current query.



1.4.1.6.1.2 Full Text Search

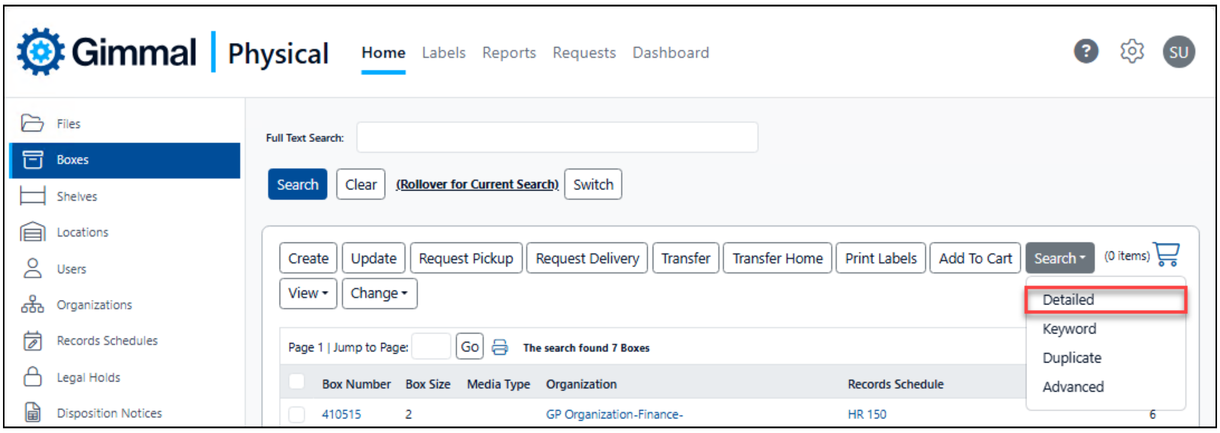
The Full Text Search is reached by clicking the 'Switch' button from the Quick Search. It allows you to enter any term which will then be used to query all text from any indexed fields for all records of the selected data type.



Note: If you are already in the Full Text Search, the 'Switch' button will return you to the query by field Quick Search.

1.4.1.6.1.3 Detailed Search

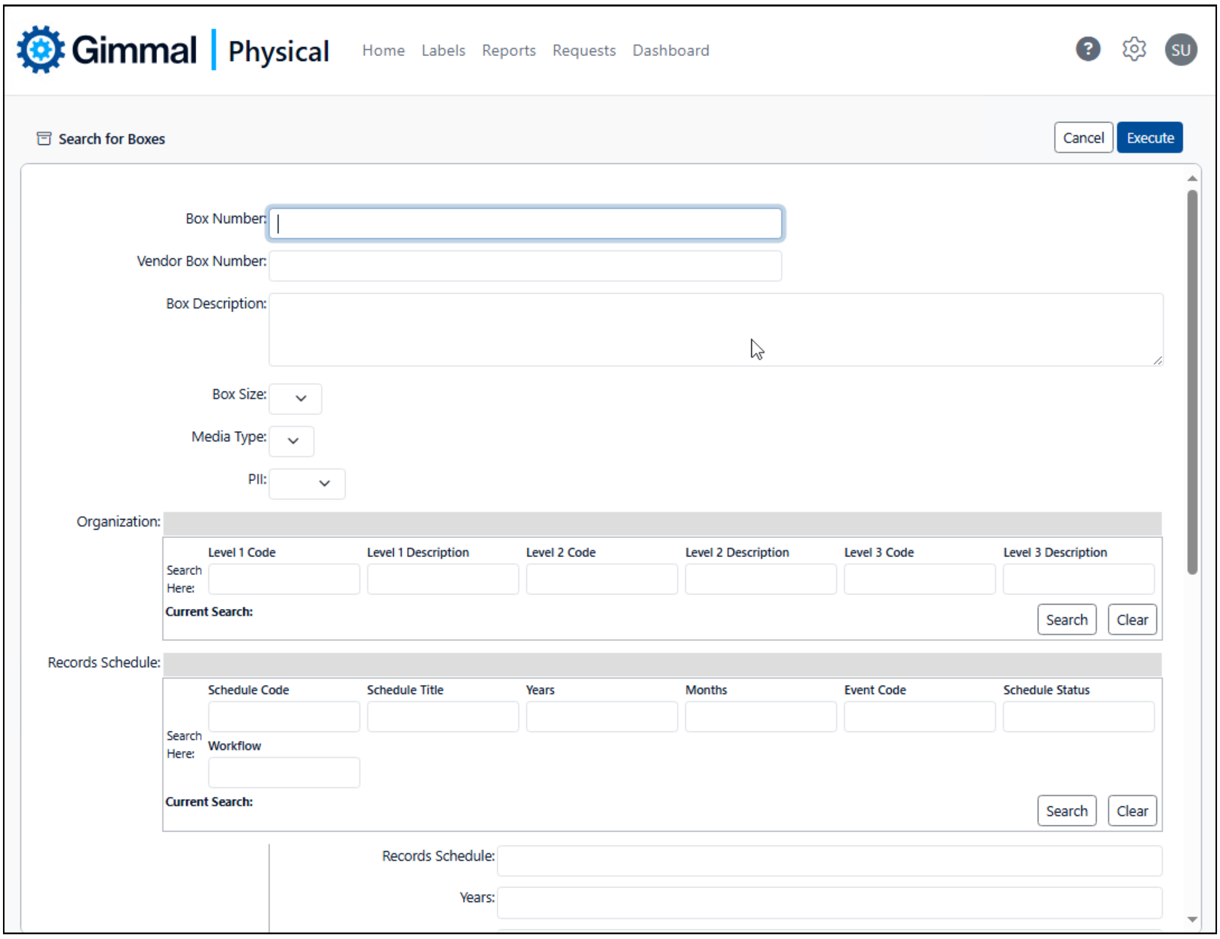
The Detail Search is accessed by clicking on the 'Search' button from the Action Bar and choosing 'Detailed'



The Detailed Search displays all searchable fields and is not limited to those fields configured for the Quick Search. Additionally, Detailed Search displays all values available to search in list fields.

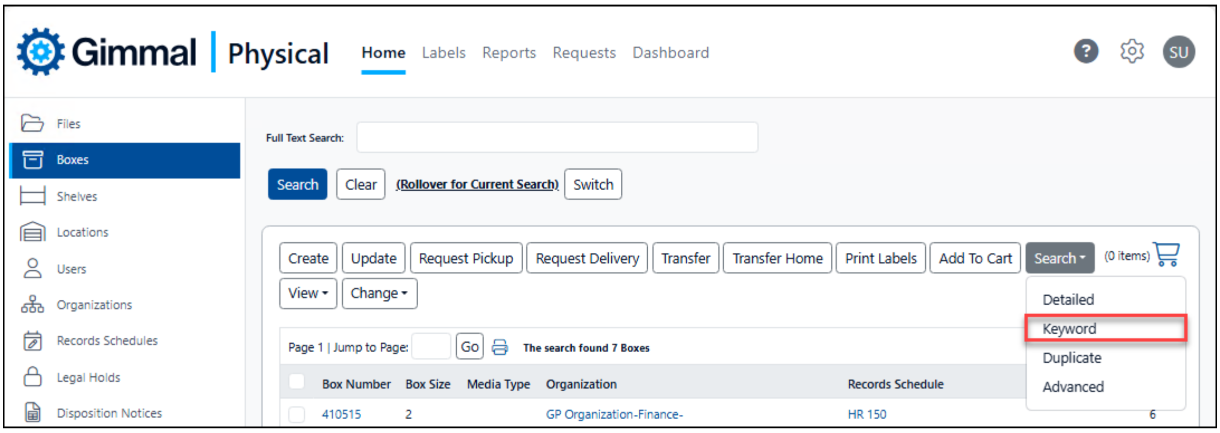
Note: This type of search will take longer to run than the Quick Search, but can help pinpoint exact data.

Once you have entered the desired criteria, click the 'Execute' button to run the search.



1.4.1.6.1.4 Keyword Search

The Keyword Search is found by clicking on the ‘Search’ button from the Action Bar and choosing ‘Keyword’

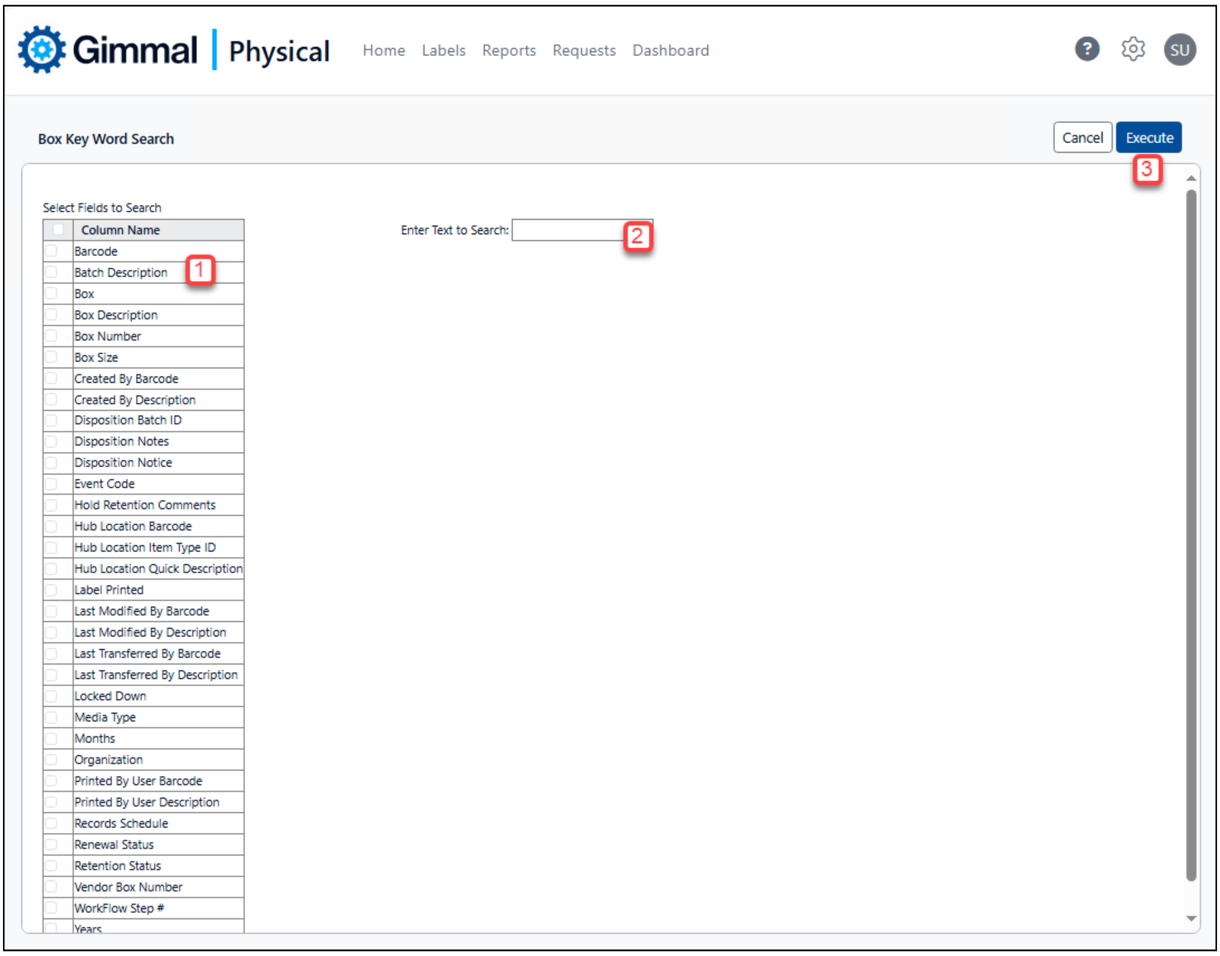


The Keyword Search is most helpful when you would like to use the same criteria over multiple fields where it can match ANY of the selected fields.

Note: This is unlike the Quick Search where if you put the same value in multiple fields, that value must match the entries in *ALL* the selected fields.

To perform a Keyword Search:

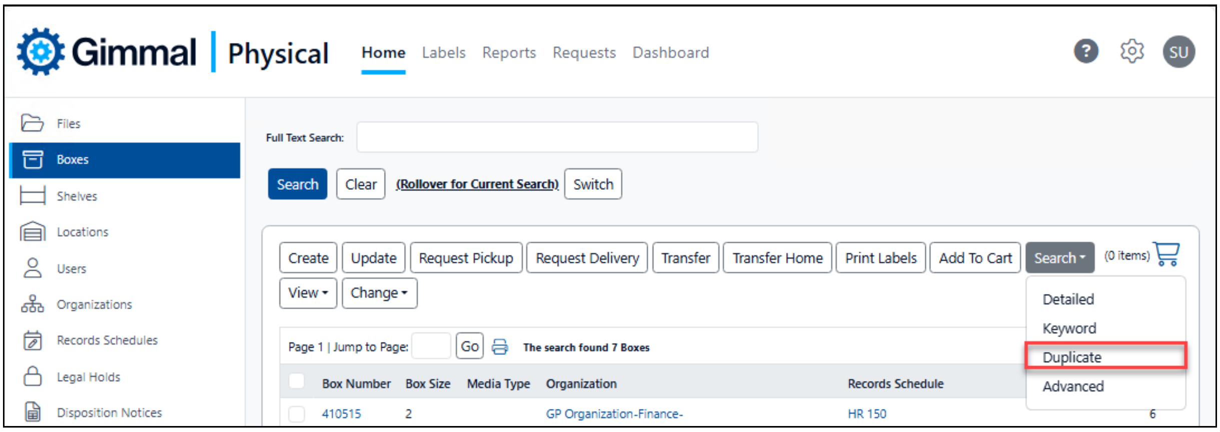
1. Choose the fields you wish to search for keywords from the ‘Select Fields to Search’ column.
2. Enter the term in the ‘Enter text to Search’ box.
3. Click the ‘Execute’ button.



Once run, you will be returned to the home page with the results of the keyword query. You can use your mouse to hover over the ‘Rollover for Current Search’ link to see the criteria being applied to the current list.

1.4.1.6.1.5 Duplicate Search

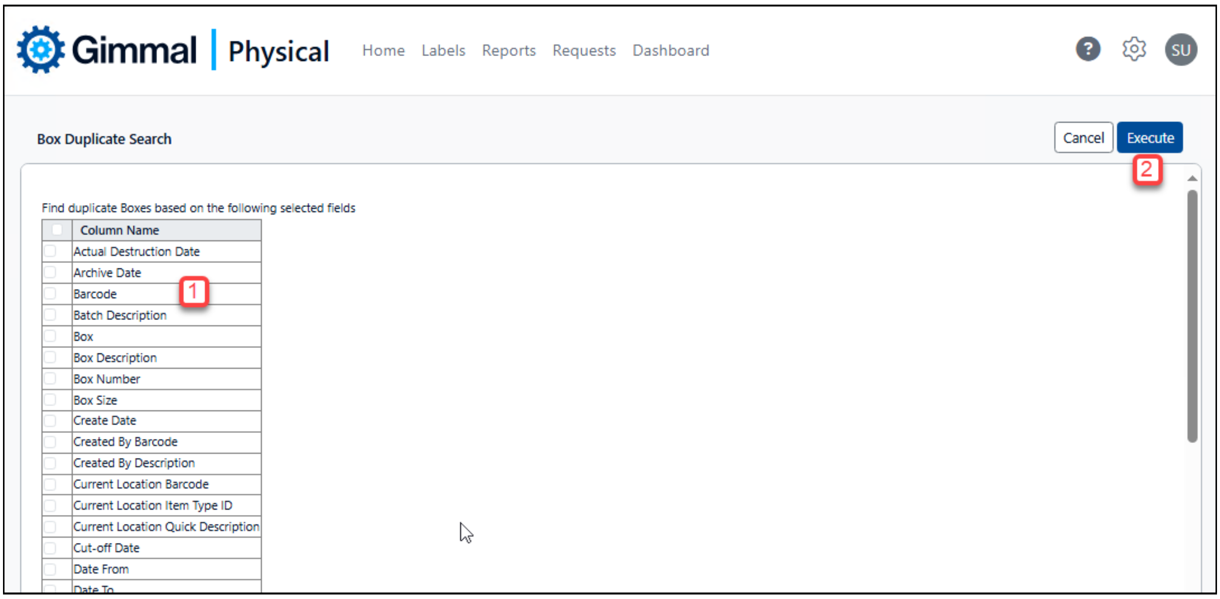
The Duplicate Search is accessed by clicking on the ‘Search’ button from the Action Bar and choosing ‘Duplicate’



The Duplicate Search is used to find items with the same values in a selected field or fields.

To run a Duplicate Search,

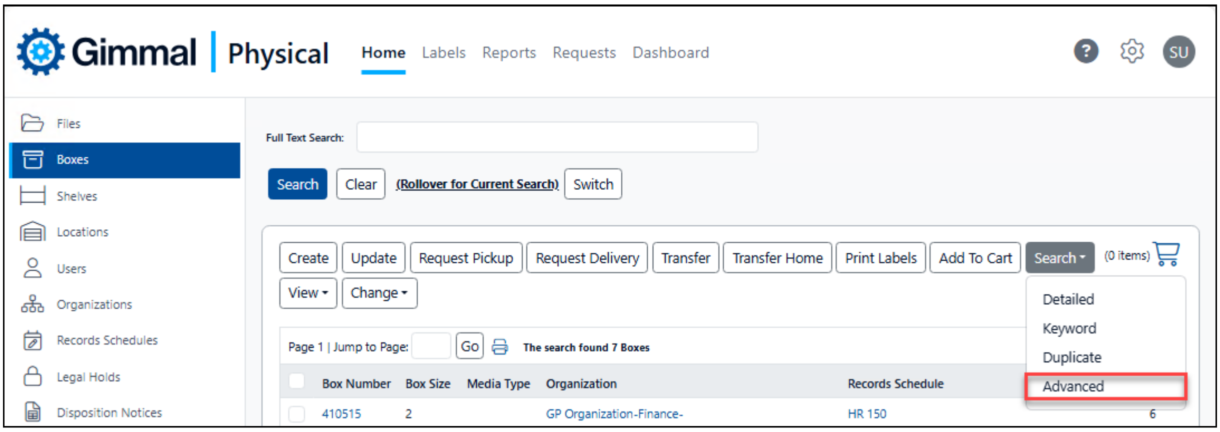
1. Select the fields which need to match to be declared a duplicate
2. Click ‘Execute’ to run the Duplicate Search



Once run, you will be returned to the home page with the results of the Duplicate Search query. You can use your mouse to hover over the ‘Rollover for Current Search’ link to see the criteria being applied to the current list.

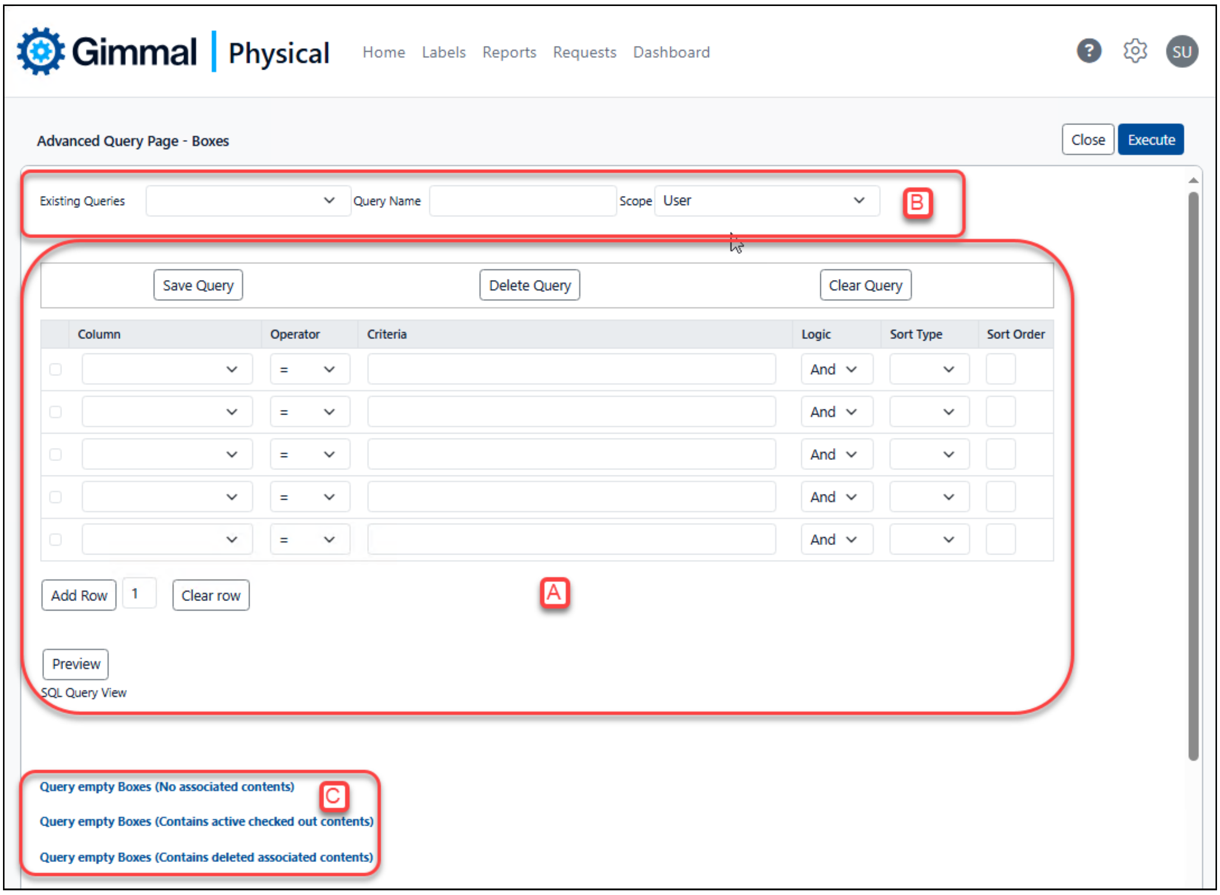
1.4.1.6.1.6 Advanced Search

The Advanced Search is opened by clicking on the ‘Search’ button from the Action Bar and choosing ‘Advanced’



Sometimes you need to use complex criteria to find exactly the data you are seeking. The Advanced Search not only allows you to use intricate logic, but it also gives you the option to save these complex searches for future use. It is the most comprehensive search that is offered in Gimmal Physical.

Note: The advanced query is best run by users with knowledge of the SQL database language.



- Section A is where you formulate your search, featuring the Query Grid
- Section B is where you can save your query, or access an existing one
- Section C is where you can query for a variety of empty boxes

Fields, Buttons, Columns and Links

- **Existing Querie**s is a drop-down list of saved queries. Selecting a query from the list will populate the query grid with the preconfigured query options.
- **Query Name** is where you enter the name of a new query to be saved
- **Scope** is where you can limit the visibility of the new query to be visible to:
  - User: Only the logged-in user
  - System: Every user who has query rights
  - Administrators: Users defined in an Administrator role
- **‘Save Query’ button** will save the existing query. Please enter the Query Name before clicking this button or an error notification will be shown.
- **'Delete Query' button** will remove an existing query from the list. You must first select an existing query before it can be deleted.
- **‘Clear Query’ button** will clear all the criteria from the query grid. To clear criteria from one or more rows, use the ‘Clear Row’ button instead.
- **Criteria Fields:**
  - Column is a drop-down box that lists the fields available for this query from the chosen tab
  - Operator is a drop-down box which lists the available operators for the chosen field
  - Criteria is a text field to enter the conditions that the selected field must match to return as a result
  - Logic is a drop-down box with operators that can be used to join multiple rows of criteria
  - Sort Type lists the choice between None (blank), Ascending, or Descending to help order the results
  - Sort Order is used in conjunction with Sort Type for deciding the order multiple fields will be sorted
- **‘Add Row’ button** adds another row to allow more room for criteria.
- **‘Clear Row’ button** removes the criteria from the selected row (as opposed to ‘Clear Query’ which removes the criteria from all rows)
- **Preview** shows the count of matching records without returning to the home page. It also will show the SQL syntax used for this query.
- **Query empty [Items]** are three links that are used to bring up a list of three different types of empty containers. These options will be titled by the type of tab you are querying, e.g. Query empty Boxes.
- **‘Close’ button** returns to the home page grid without running the query. No criteria are saved.
- **'Execute button** runs the query and returns to the home page with the query applied. Criteria are not saved, but the *Rollover for Current Search* link will show the current query.

Saving your Advanced Query

Note: Make sure you save your query before you click the ‘Close’ or ‘Execute’ button.

1. Enter the Criteria
2. Use the ‘Preview’ button to verify the results and query are as expected
3. Enter the name of the query in the ‘Query Name’ text box

4. Click ‘Save Query’

Running an Existing Query

1. Select the query you wish to run from the list of ‘Existing Queries’
2. Make any needed changes:
   Note: If you wish to save your changes, do so before clicking ‘Execute’ or your changes will be lost.
3. Use the ‘Preview’ button to verify the results and query are as expected
4. Click the 'Execute button to return to the home page grid with the query applied

Searching for Empty Items

Any item that is a container (e.g. Boxes, Shelves) can be searched to find instances where they are empty. There are three queries (C) to cover the three most common scenarios:

- **Query empty [Items] (No associated content)** will have the resulting grid show all container items that have no associated contents at all. Any items previously inside the listed containers will have been unassociated or expunged. Alternately, these containers could have been created as a new item that never had associated content added (e.g. a new box without any files ever added). None of these containers will have actively checked out content, nor is there any ‘deleted’ content associated with the container.
- **Query empty [Items] (Contains active checked out contents)** will have the resulting grid show all container items where there are no contents that have the container as a current location (i.e., it is empty), but which have active associated child contents that are checked out (e.g., files checked-out of a given box). This means an empty container will appear in this query if it currently has no items in it, but which:
  - Has associated active content that is checked out (home ≠ current)
    Note: using boxes and files as examples:
    - If a box has an active file checked out as well as an associated deleted file, it **will** show in this list
    - If the box only has deleted associated files, it will **not** show in this list.
- **Query empty [Items] (Contains deleted associated contents)** will have the resulting grid show all container items which would be considered empty except all associated content has been deleted, but not expunged. This means an empty container will appear if it has no items, but which:
  - Deleted contents (e.g. files) associated with it (home = current)
  - Deleted contents (e.g. files) that are checked out (home ≠ current)
  - Note: using boxes and files as examples:
    - If a box has an active file checked out as well as an associated deleted file,
      it will not show in this list
    - If the box only has active, checked-out associated files, it will not show in this list.

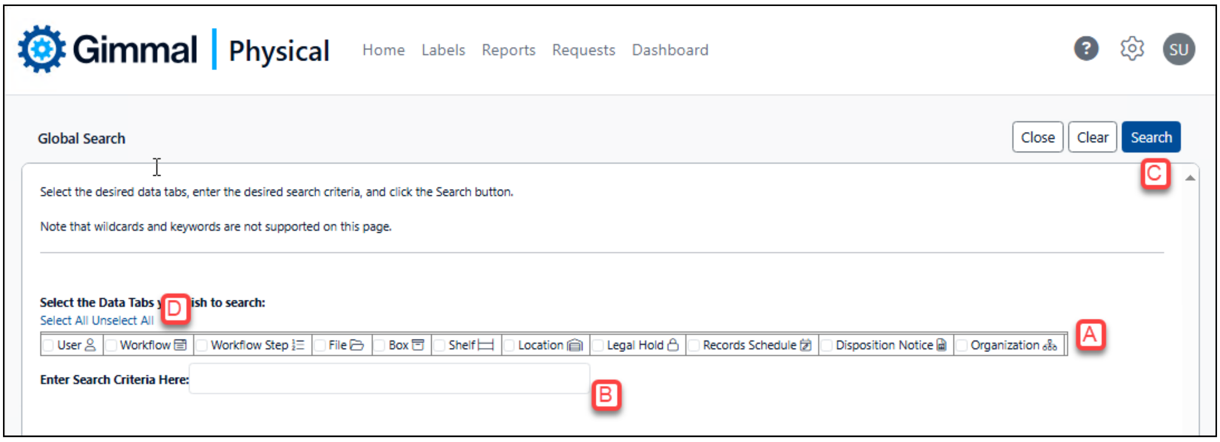
1.4.1.6.1.7 Global Search

The Global Search provides this functionality to search across multiple item types simultaneously.

Because a Global Search is a resource intensive process and places a significant load on the server, it should be used only when it is not possible to perform the search on any of the other Gimmal Physical search types.

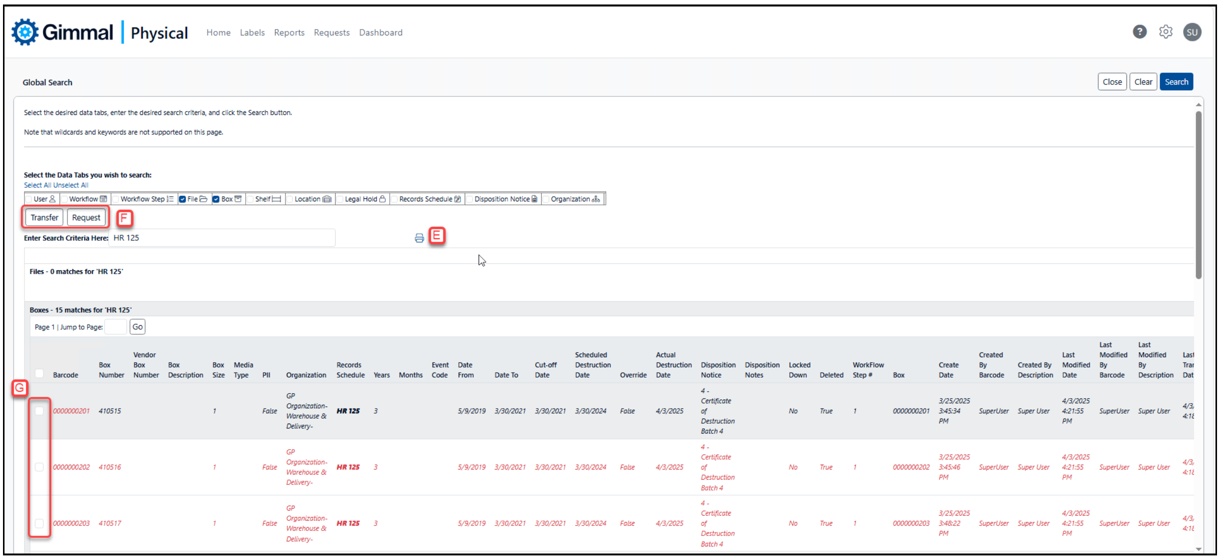
To perform a Global Search:

1. Click the 'Admin' link on the Gimmal Physical Navigation menus.
2. Choose ‘Global Search’ under the Data section of the ‘Administration’ page. This opens the ‘Global Search’ page.
3. On the Global Search page, select the item types you would like to search using the checkboxes located at the top of the page. (A). You can also use the ‘Select All’ and ‘Unselect All’ links (D) to select or deselect the tab choices.
4. Enter the desired word or phrase (with or without wildcards) in the criteria text box. (B)
5. Click the ‘Search’ button or press the enter key to execute your search. (C)



The results will be displayed in the grid on the Global Search page, sectioned by type. A ‘Print’ button (E) will be enabled allowing you to create a report of the data presented on this page.

> If an action can be performed on the specific records, there will be action buttons (e.g. Transfer, Request) at the top of the screen (E) with selection checkboxes (G) next to the records that are available for the actions. Select the desired records and click on the available Action Button to apply the action to the selected records.



1.4.1.6.2 Search Syntax

There are several syntax options to assist in the creation of a search.

1.4.1.6.2.1 Simple Search

The easiest way to search in Gimmal Physical is to enter into the search text box an example of the term you would like to see in the results. For example, to find all items with a last name of '*bennet*', simply enter 'bennet' (without the quotes) in a Last Name field.

1.4.1.6.2.2 Search with Wildcards

Gimmal Physical supports wildcard searching using the percent sign (%) as a wildcard. For example, to find all items with a last name that starts with the letters '*ben*', simply enter '*ben%*' (without the quotes) in the last name field. To find a last name that contains the letters '*ben*', enter ''*%ben%*' (without the quotes. That will return *bennett*, *toben,* and *vanbenty*.

- Note – Your Gimmal Physical system may be configured to automatically add a trailing wildcard to any searches. In that case, do not add any wildcards to the search.

1.4.1.6.2.3 Search with Operators

It is also possible to search for multiple values in a field using search operators For example, to find all items with the last name 'bennet' or 'parker', simply enter the text '*bennet or parker*' (without the quotes) in the last name field. In this case, the '*or*' operator is used to tell Gimmal Physical to search the last name field for records with 'bennet' or 'parker'.

<u>Available Operators</u>

- ***or*** – **Any terms listed -** for example '*bennet or parker*' (without the quotes) will return would find all items with either 'bennet' **or** 'parker' as a value for the field.
- ***and*** – **Every term that is listed** - for example 'b% and '%t. This would find all items where a field starts with 'b' **and** ends with 't'.

- **> Greater Than a** - for example,> 1/1/2000. This would find all items where a field is **greater than** January 1, 2000. This is often used for date and numeric fields.
- **>= Greater Than or Equal** – for example >= 1/1/2000. This would find all items where a field is **greater than or equal to** January 1, 2000.
- **< Less Than** - for example < 1/1/2000. This would find all items where a field is **less than** January 1, 2000.
- **<= Less Than or Equal to a**– for example <= 1/1/2000. This would find all items where a field is **less than or equal to** January 1, 2000.
- ***<> Is Not Equal To*** will find everything except the listed value – for example <> 'bennet'. This would find all items where a field is **not equal to** 'bennet'.
- ***isnull*** – This would find all items where a field **has a null value**.
- ***isnotnull*** – This would find all items where a field **is not null**.

1.4.1.6.2.4 Search With Reserved Words

All date fields in Gimmal Physical may also be searched using the reserved words ‘Yesterday’, ‘Today’, or ‘Tomorrow’.

> Gimmal Physical also offers a Search and Replace functionality which allows users to replace specified text in chosen fields. Please see Search and Replace (see page 142) for more details.

1.4.1.7 Changing User Password

This article refers to changing a user password for organizations using basic authentication.

Please Note: Many organizations will use a Single Sign On method for authentications which is covered under Technical Specifications, not in this article.

A user must be logged in to change a password. There are two ways a user's password may be changed:

- A user account can change their own password
- An administrator changing user passwords

1.4.1.7.1 Changing Password from a User Account

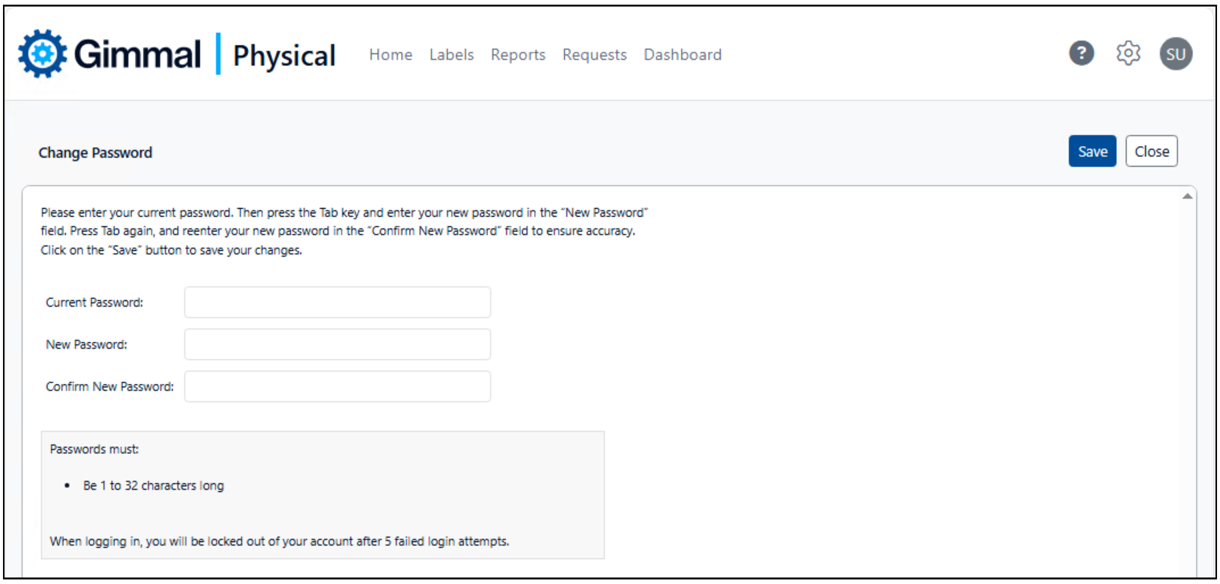
Each user has the ability to change their own password. To do so:

1. Click Admin from the Gear icon to open the Administration page
2. Click the Change Password link to open the Change Password screen.
3. Populate the required fields:
    a. Current Password: Enter your current password.
    b. New Password: Enter the desired new password

    c. Confirm New Password: Enter the desired new password again to confirm.
4. Click the ‘Save’ button to save the new password.

Note:

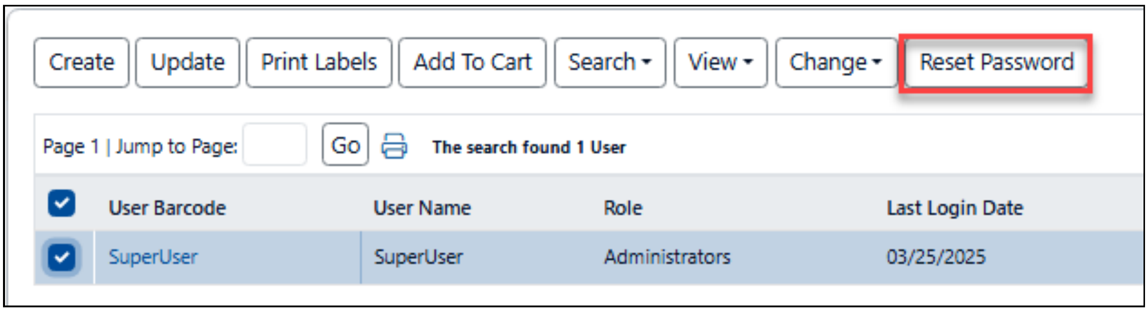
- The rules for passwords listed at the bottom of the screen are set by your System Administrator.



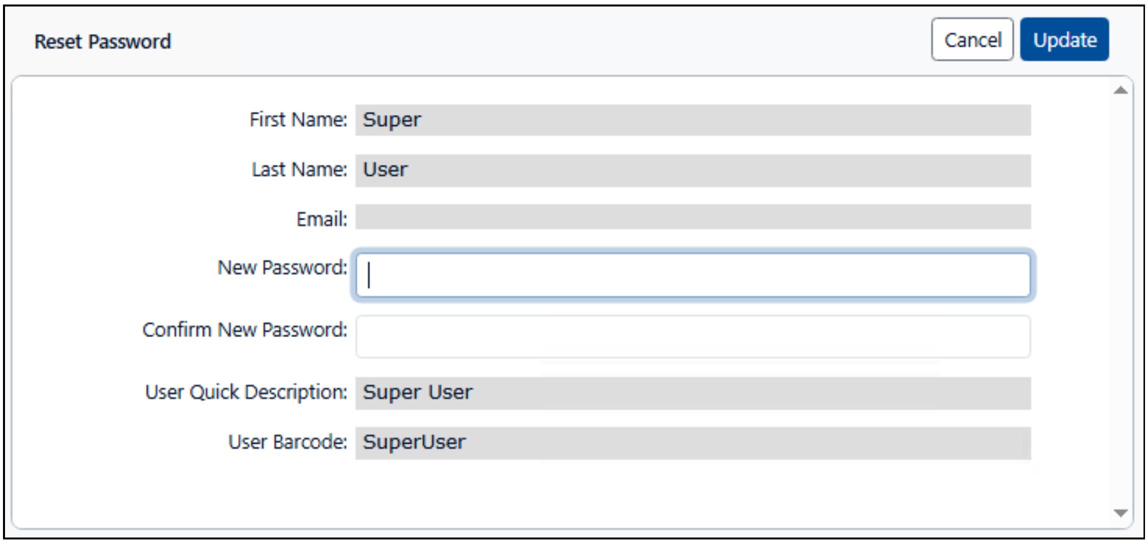
1.4.1.7.2 Changing User Password from a Privileged Account

Users with appropriate security privileges (typically administrators) can change passwords for other users. If an account has the appropriate rights to reset another user's password, the functionality will be displayed as an action button on the User tab.

1. Navigate to the User tab from the home page screen.
2. Query and then select the user whose password you would like to change.
3. Click the ‘Reset Password’ button from the action menu on the home page screen, or view the user and click ‘Reset Password’ button.



4. On the Reset Password screen enter the require information
    a. New Password: Enter the desired new password
    b. Confirm New Password: Enter the desired new password again to confirm.
5. Click the 'Update' button.



Note:
Administrators have the option to force a new password to be generated. This is typically done to prompt a new user to change their password after they have been first added to the system.

1.4.1.8 Records Officer User Guide

Administrators have the option to create a role specifically for Records Officers which may also be called a 'File Room User'. This role generally performs more advanced tasks than a general user, but not quite as many as an administrator. Directions for the common tasks encountered by this type of user can be found below.

1.4.1.8.1 Finding Items

1. Click on the desired Tab.
2. Choose the field you wish to search from the Quick Search.
3. Enter appropriate search criteria in the chosen search field in Quick Search.
4. Click on the Search button.
5. Desired results will be returned in the grid format.

1.4.1.8.2 Transferring Items

1. Click on the desired Tab.
2. Click on the check box next to the item(s) you wish to transfer.
3. Click on the Transfer Action button.
4. Click on the desired destination in the Recent Transfer Destinations grid or specify the desired destination on the resulting Transfer page.
5. Click on the Transfer button on the Transfer page.

1.4.1.8.3 Creating Items

1. Click on the desired Tab.
2. Click on the Create Action button.
3. Enter the desired information and/or choose desired drop-down values.
4. Click on the Save & New button to continue creating records, click on the Save & View button to return to the View page after record creation or click on the Save & Close button to return to the Home Page grid after record creation.

1.4.1.8.4 Updating Items

1. Click on the desired Tab.
2. Click on the check box next to the record you wish to update.
3. Click on the Update Action button.
4. Make desired changes on the resulting Update screen.
5. Click on the Update button on the Update screen.

1.4.1.8.5 Deleting Items

1. Click on the desired Tab.
2. Click on the check box next to the item you wish to delete.
3. Click on the delete button.
4. Click ok on the resulting message confirming the deletion of this record.

1.4.1.8.6 Printing Labels

1. Click on the desired Tab.
2. Click on the check box next to the Item(s) you wish to print labels for.
3. Click on the Labels button.
4. Click on the Send to Queue button to send the items to the label queue or click on the Print button to print labels immediately.

1.4.1.8.7 Printing Queued Labels

1. Click on the Label Queues top level menu link.
2. Click on the label queue you wish to print labels for.
3. Click on the check box next to the item(s) you wish to print labels for.
4. Click on the Print Selected button to print the selected items to the label queue or click on the Print All button to print all the labels in the label queue.

1.4.2 Advanced Functionality

This section describes some advanced features of Gimmal Physical. Use the tree view to the left to navigate to the different topics or select from the list below.

Please see the list of tutorials (see page 294)for interactive guides for many of these topics.

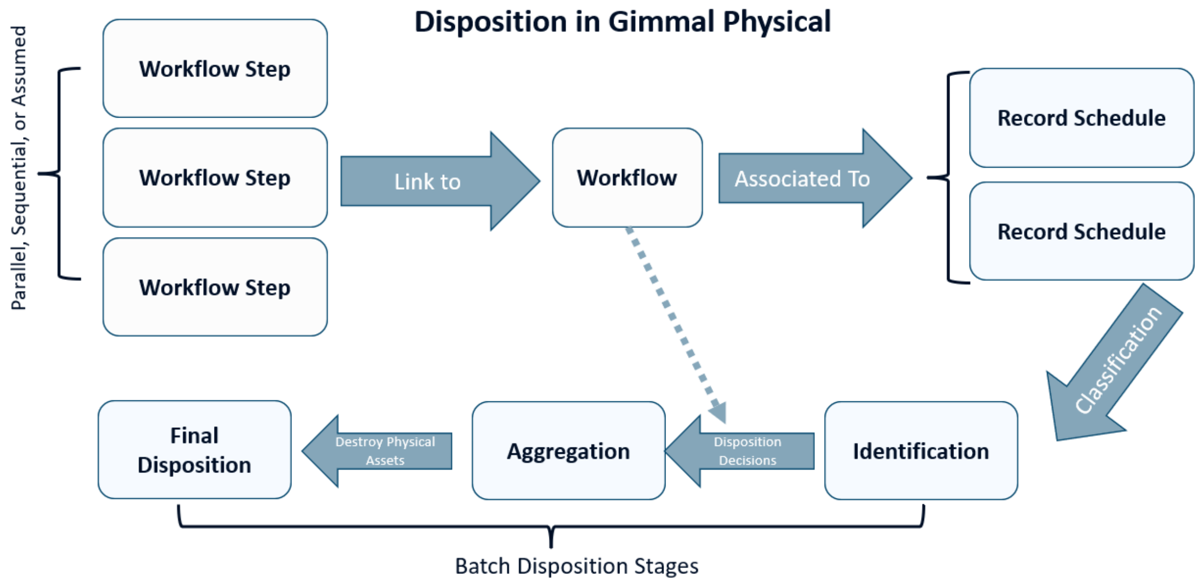
1.4.2.1 Disposition in Gimmal Physical

This topic has interactive tutorials. To view them, click these links:

1. Foundations of Disposition in Gimmal Physical[21]
2. Disposition Process[22]

There are a number of aspects to Disposition in Gimmal Physical. Records Managers can leverage part or all of the process to assist in the disposition of physical assets.

21. https://gimmal.navattic.com/qjw0vxv
22. https://gimmal.navattic.com/mff0eh9



These articles discuss each portion of the retention process:

- Retention Schedule (see page 111)
- Workflows (see page 114)
  - Workflow Steps (see page 116)
- Scheduled Disposition Guide (see page 120)
  - Explanation of Dates (see page 122)
  - Disposition Process (see page 124)
    - Identification Stage (see page 125)
    - Disposition Decisions (see page 128)
    - Aggregation Stage (see page 132)
    - Disposition Stage (see page 133)

Please review these tutorials to help navigate the Disposition process.

1. Foundations of Disposition in Gimmal Physical[23]
2. Disposition Process[24]

1.4.2.1.1 Retention Schedule

Gimmal Physical supports the creation and management of an overall Retention Schedule (also known as a File Plan) consisting of an unlimited number of time or event-based records series. When associated to records, these record series determine the eligible disposition date.

23. https://gimmal.navattic.com/qjw0vxv
24. https://gimmal.navattic.com/mff0eh9

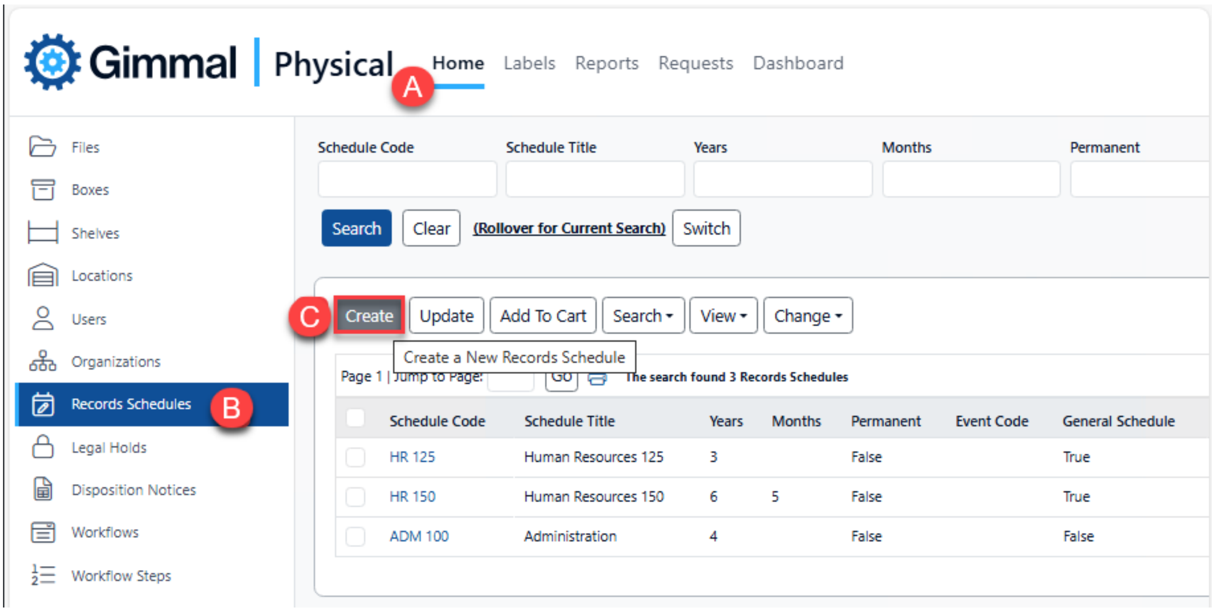
> **Reminder**
> The actual field, tab and action button names can be configured per organization and may vary from those shown in the examples. Common names include Record Schedule, Record Series or Retention Schedule.
> Our example uses the name 'Records Schedule'.

1.4.2.1.1.1 Creating a Record Schedule

To create a new Record Schedule in Gimmal Physical,

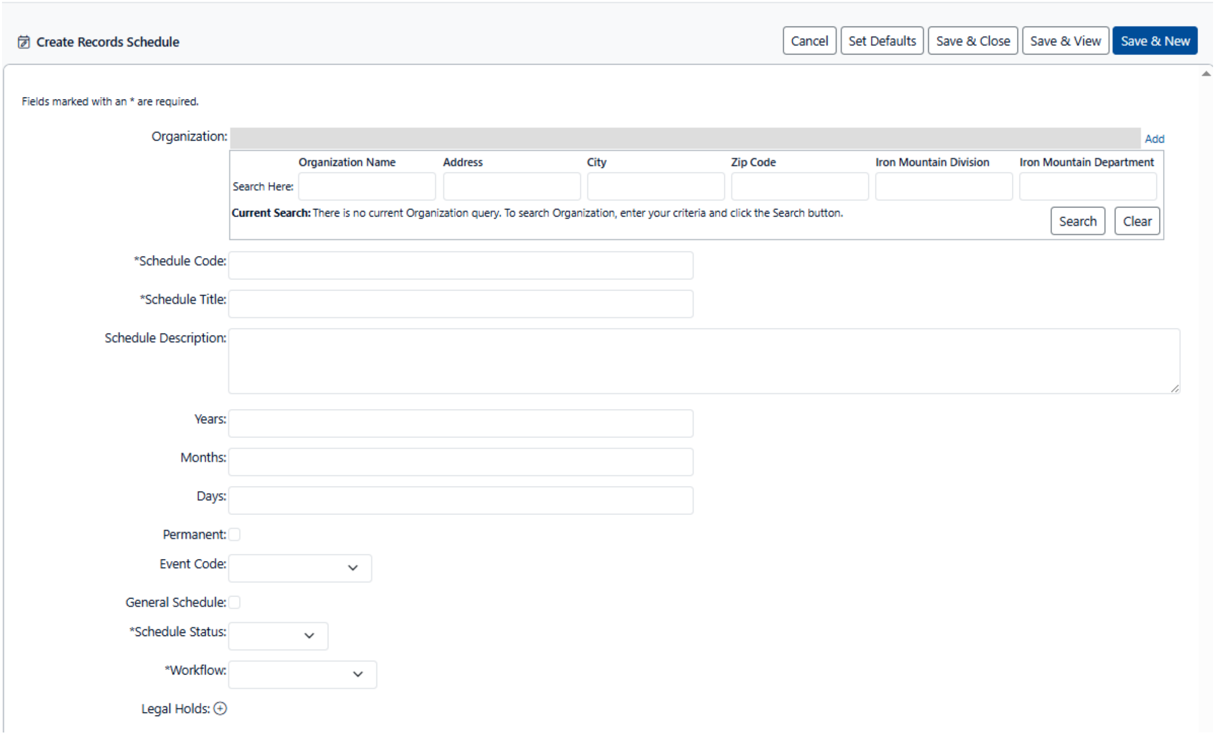
1. Choose *Home* on the Navigation Menu (A)
2. Click on the Records Schedule item type tab (B)
3. Select the 'Create' Action button (C).

> In this example, the application has been configured to call this tab 'Records Schedule'.



The Create Records Schedule screen opens, allowing for the entry of various metadata defining the schedule.

- **Cancel** closes the form without saving any changes.
- **Set Defaults** saves the currently entered values as defaults for any new record.
- **Save & Close** will save all fields and close the form, returning to the home page.
- **Save & View** will save all fields and go to the View page for the item.
- **Save & New** will save all fields for this item and remain on the page to create a new item.



The fields which are shown reflect the specific configuration of your organization and the types of retention schedules enabled in your organization. However, some general notes:

- The fields marked with an asterisk (*) are required.
- For disposition approval of records associated to a specific schedule, a workflow must be created for that schedule.
- Records must be associated with an active retention schedule for automated disposition calculations to take place. See Schedule Disposition Guide (see page 120) for more details.
- Similar to all item types, an unlimited number of Retention Schedules may be created.

After entering the data to define the schedule, save the Retention Schedule.

1.4.2.1.1.2 Updating a Records Schedule

To update an existing retention schedule:

1. Select the retention schedule you wish to update using the selection box in the first column of the screen.
2. Click the ‘Update’ button. The update screen will open allowing you to edit existing values if your permissions allow.

1.4.2.1.1.3 Applying a Records Schedule

To apply a retention schedule to a record via the user interface:

1. Select the desired data item tab (e.g. Boxes).

2. Query the record that should have the schedule applied
3. Select 'Update' to open the update screen for the record..
4. Search for and select the appropriate record schedule
5. Click the radio button to apply
6. Click the Update button to save the changes to the record.

1.4.2.1.2 Workflows

Workflows are an optional feature designed to help manage disposition decisions (approvals and rejections) as part of the Disposition Process (see page 110). A Workflow must be associated to a Records Series (see page 111) in order for any records related to that schedule to be dispositioned. There are four types of disposition workflows:

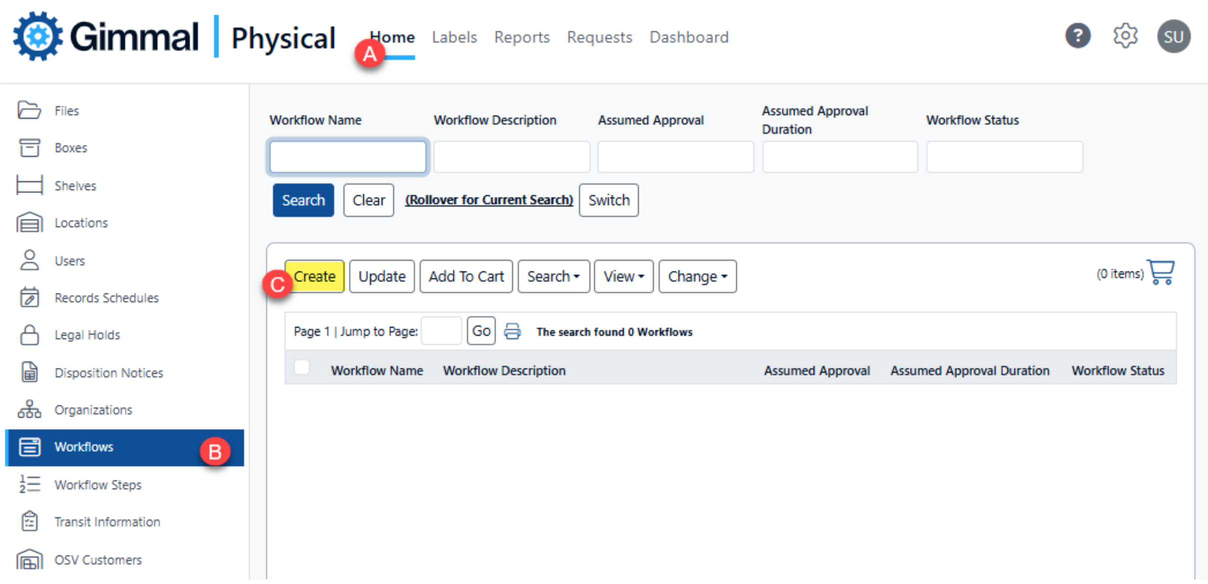
- Standard (one-step, explicit approval required)
- Sequential (multiple-step, explicit approvals required in a specified step order)
- Parallel (multiple-step, explicit approvals required, but the steps can be in any order)
- Assumed (one-step, system-generated approval auto-completed)

Workflow steps, specifying step order, step name, acceptable approvers, and other optional metadata are required to be created within each Workflow.

Once configured, Workflows can be assigned one or many Record Schedules (see page 111)via the user interface (Update or Bulk Update), or via an automated or manual import of data.

Reminder
The actual field, tab and action button names can be configured per organization and may vary in from those shown in the examples.

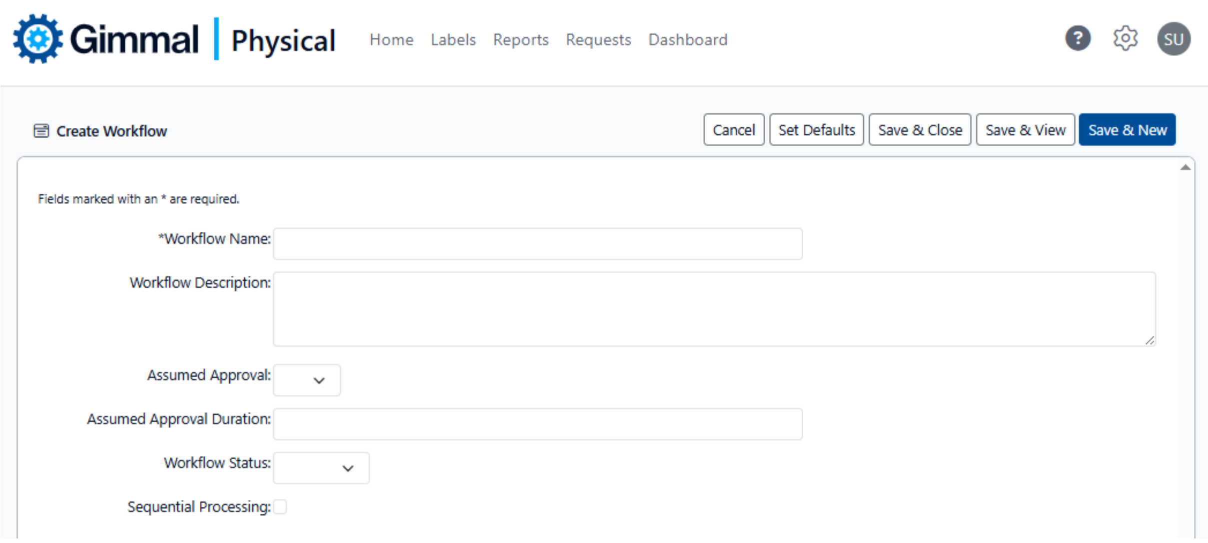
1.4.2.1.2.1 Creating a Workflow



To create a new Workflow in Gimmal Physical:

1. Choose *Home* on the Navigation Menu (A)
2. Click on the Workflow tab (B)
3. Select the 'Create' Action button (C).

The Create Workflow page will now open.



The fields available in this page define the workflow:

- **Workflow Name:** The primary identifier for this Workflow. It will serve as a selection value in drop down lists for Retention (or Record) Schedules (see page 111) and Workflow Steps.
- **Workflow Description:** Free form text field to describe this workflow.
- **Assumed Approval:** Option for automatically approving the disposal of items in a batch. This eliminates the need for manual disposition decisions. Once the number of days (after Batch

creation) specified in Approval Duration has transpired, records associated to this Workflow (via their shared Records Series) will be automatically approved by the system and date/time stamped accordingly.
***Note**: At least one Workflow step will still need to be created.*

- **Assumed Approval Duration:** The amount of time (in Days) to wait before the system automatically approves records related to this workflow via their shared records series. This allows a records manager time to review items before approval occurs.
  - If the item is removed from the batch before the approval duration is complete, it will not be marked for disposition approval.
  - Leave this field blank for immediate approval.
- **Workflow Status:** The current status of the workflow.
- **Sequential Processing:** Determination of the type of processing to be used with multiple workflow steps.
  - **If Checked:** Sequential Processing is enabled which forces each Workflow Step to be completed (i.e. all items in the batch approved, rejected or removed) before the next Workflow Step can begin.
  - **If Unchecked:** Sequential Processing is disabled and Parallel Processing is used. This allows any Workflow Step to be completed in any order. One Workflow Step does **not** wait for another to complete.
  - ***Note:** This option cannot be used with Assumed Approval enabled.*

Once the Workflow has been created, it need to be linked to Workflow Steps (see page 116).

1.4.2.1.2.2 Workflow Steps

Workflow steps work in conjunction with Workflows to detail the process for disposition decisions (approvals and rejections) as part of the Disposition Process (see page 110). Workflow Steps can only be associated with a single Workflow, but there is no limit to the number of steps that can be created per Workflow.

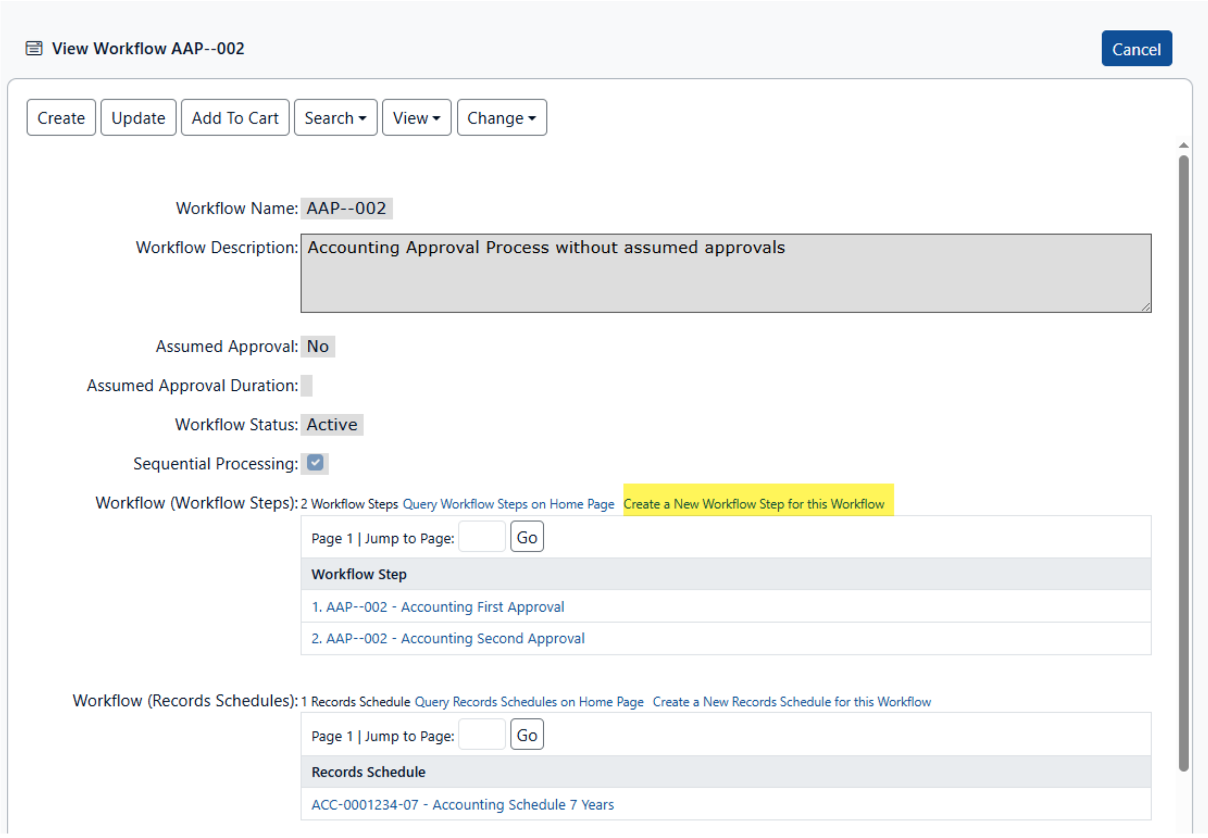
Workflow Steps are created and managed via a data tab accessed on the left panel when the ‘Home’ navigation menu is selected. Each Workflow Step can be assigned to a single Workflow.

Creating a Workflow Step

> Before creating Workflow Steps, please map out the order in which you’d like to have the steps performed. As each Workflow Step is created within a given Workflow, they are automatically given an incremented ‘Step Number’. These numbers are used for the order of processing, which is especially important if using Sequential Processing.

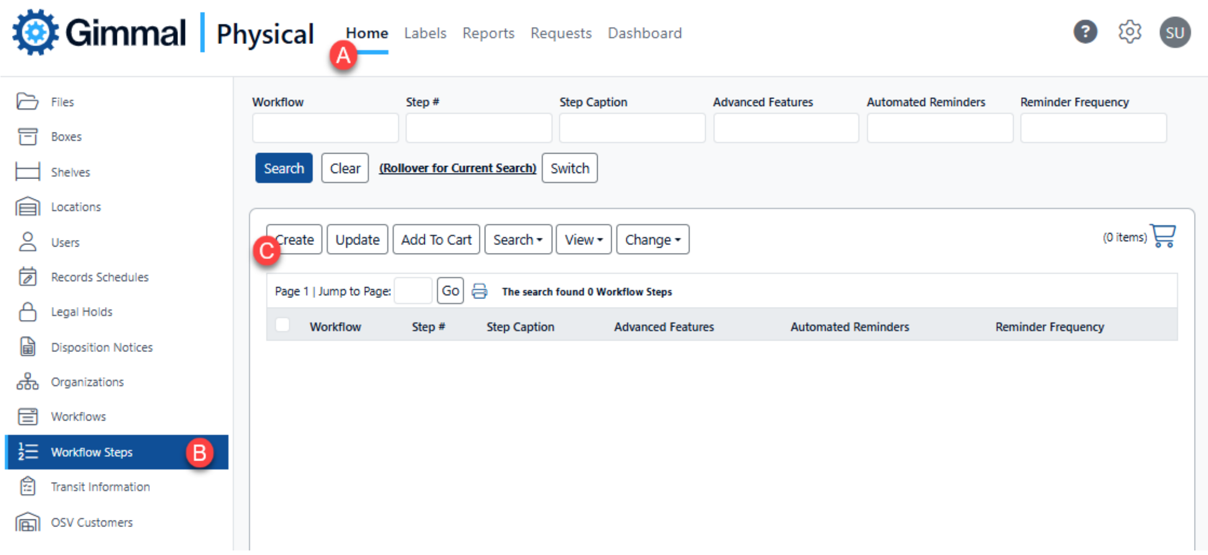
There are two methods to create a new Workflow Step in Gimmal Physical.

From within a Workflow (suggested)



1. Navigate to the Workflow (see page 114)screen
2. View an existing Workflow.
3. Choose ‘Create a New Workflow Step for this Workflow’
4. Fill in the Workflow Step details (see below) and save.
5. Return to the Workflow screen and repeat as needed.

From the Home Navigation screen



To create a new Workflow Step in Gimmal Physical:

1. Choose *Home* on the Navigation Menu (A)
2. Click on the Workflow Steps type tab (B)
3. Select the 'Create' Action button (C).

The Create Workflow Steps page will now open.

Create Workflow Steps Page

The options available on the Workflow Steps creation and update pages will depend on the 'Assumed Approval' value on the associated Workflow.

The following fields are required when Assumed Approval is enabled or disabled:

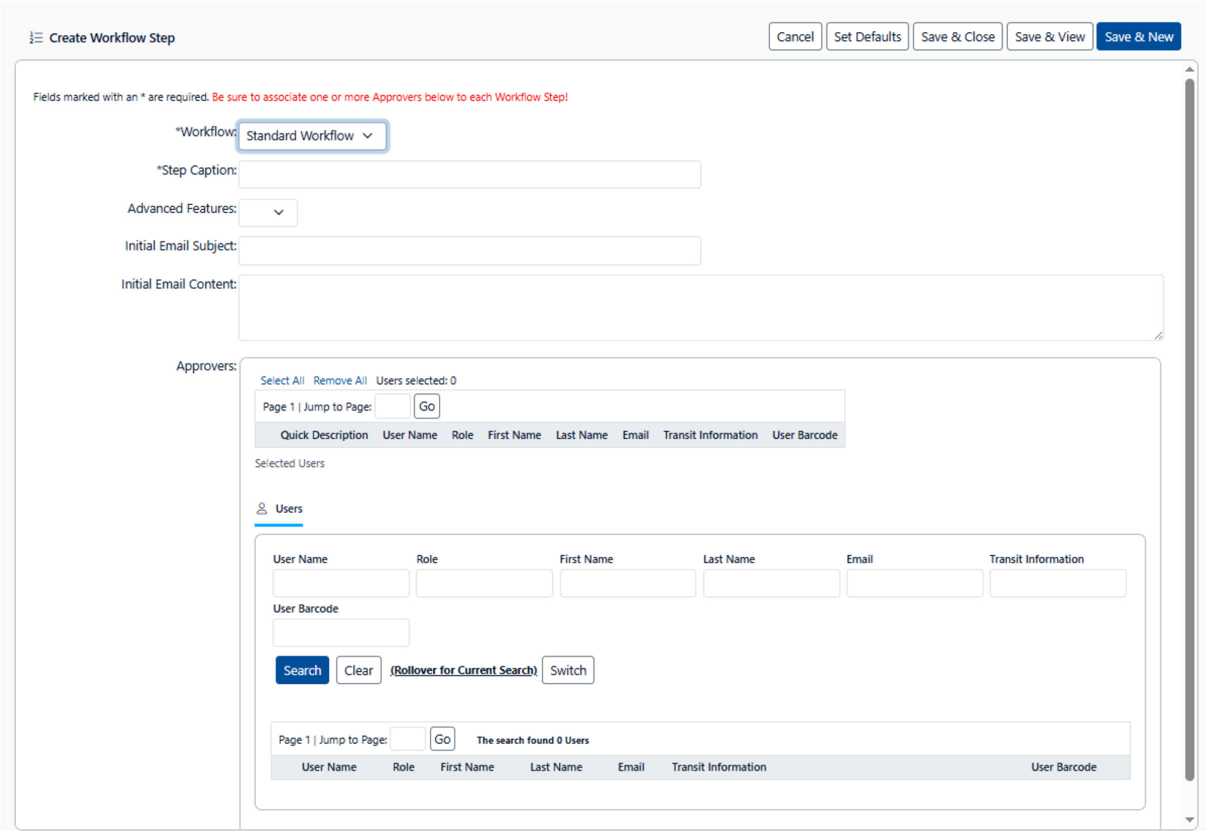
- ***Workflow:** Drop-down list of Workflows that are available for assignment.
- ***Step Caption**: Description for this Workflow Step.

> Note: Fields with asterisks (*) are required.

Without Assumed Approval

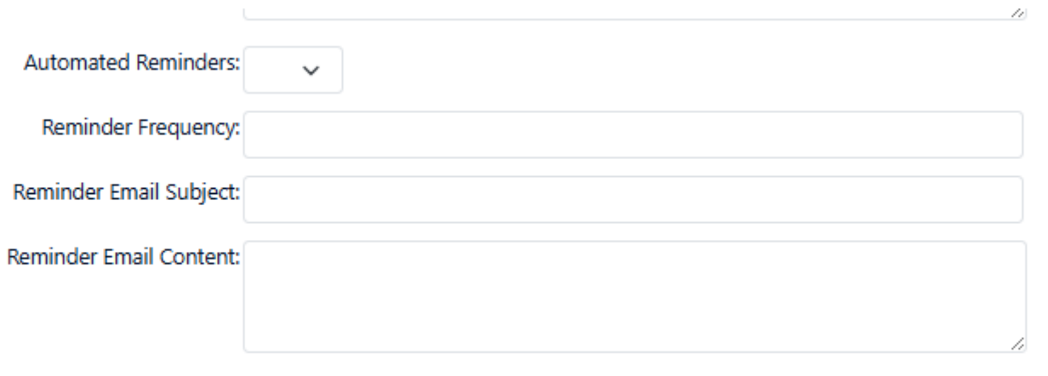
When the source Workflow does **not** have Assumed Approval enabled, additional Workflow Step options become available:

- Fields that support the sending of initial and reminder emails to notify the approvers when they have a disposition ready for a decision. These are also known as Disposition Alert Emails.
- Assigning one or more recipients of those emails. These 'Approvers' can then make a decision (see page 128)(approve or reject) for the workflow step.



The fields available expand to include:

- **Initial Email:** Details for the initial disposition alert email that is sent to the associated approvers when a batch is created (see page 124).
  - **Subject:** Subject line for the initial email.
  - **Content**: Text that will be included with the initial email.
    Note: *Text hyperlinks can be included. (e.g. https://gimmal-physical-dev.gimmal.com/), but embedded hyperlinks are not currently supported.*
- **Advanced Features**:
  - No: The default view will show with no option for reminder emails
  - Yes: Fields related to reminder emails will be shown



- **Automated Reminders:** Yes/No field which dictates whether automated reminders will be sent to the approvers after the initial email has been sent.

- **Reminder Frequency:** In Days, the amount of time between the initial email and the reminder, or any subsequent reminders, continuing until the workflow step has been completed.
- **Reminder Email:** Details for the subsequent disposition alert reminder email that is sent to the listed approvers after the first email:
  - **Subject:** Editable subject line for the reminder email.
  - **Content**: Editable text that will be included with the reminder email.
    ***Note**: Text hyperlinks can be included. (e.g. https://gimmal-physical-dev.gimmal.com/), but embedded hyperlinks are not currently supported.*
- **Approvers:** One or more users who will make disposition decisions. If the source Workflow is not using Assumed Approval, then at least one approver is required.

> Any approver listed in this step can fulfill the disposition decisions for the given step for a given batch. If *all* approvers are required to approve at a certain level, create separate Workflow Steps for each group of users.

Helpful Hints

> - The disposition alert emails created in the Workflow Steps are only sent when the following are all true:
>   - Both subject and content fields are populated
>   - Selected Approvers email addresses are populated
>   - The Assumed Approval option in the associated Workflow is not enabled.
> - For parallel approvals, all associated users for all the active steps will have emails sent at the same time.
> - For sequential approvals,
>   - Initially, only the first step in a Workflow is active.
>   - Only the users associated with the active steps will receive email alerts (and reminders).
>   - Notifications are sent if there are any active records in a given step.
>   - If reminder email alerts are configured, approvers will continue to receive reminder emails until all the records have been approved or rejected.
>   - Users associated with the next sequential step will be notified when the previous step has records that have been approved and need to pass to the subsequent step. The previous step may still be open for partially completed batches.
> - To have approvers without disposition alert emails, leave the subject and content fields empty.

1.4.2.1.3 Scheduled Disposition Guide

For this process to work correctly, Retention and Disposition features need to be enabled as part of the configuration when Gimmal Physical is enabled.

This guide focuses on the process for deleting records associated with Records Schedules with a Disposition Action of '**Destroy**'. Records associated with a Records Schedule with Disposition Action of '**Permanent**' or on Legal Hold will never enter into a Disposition Batch.

- To prevent Records associated with a Records Schedule with Disposition Action of '**Transfer**' from entering the disposition process, the Schedule itself must be placed on Legal Hold. This will prevent the associated records from entering the disposition process.
- This document refers to Gimmal Physical version 4.0 and above only. For questions on earlier versions, please contact support at support@gimmal.com[25] or review the Legacy Help Disposition Guide (see page 402).

Please review the articles describing disposition below. In the examples below, Boxes will be used.

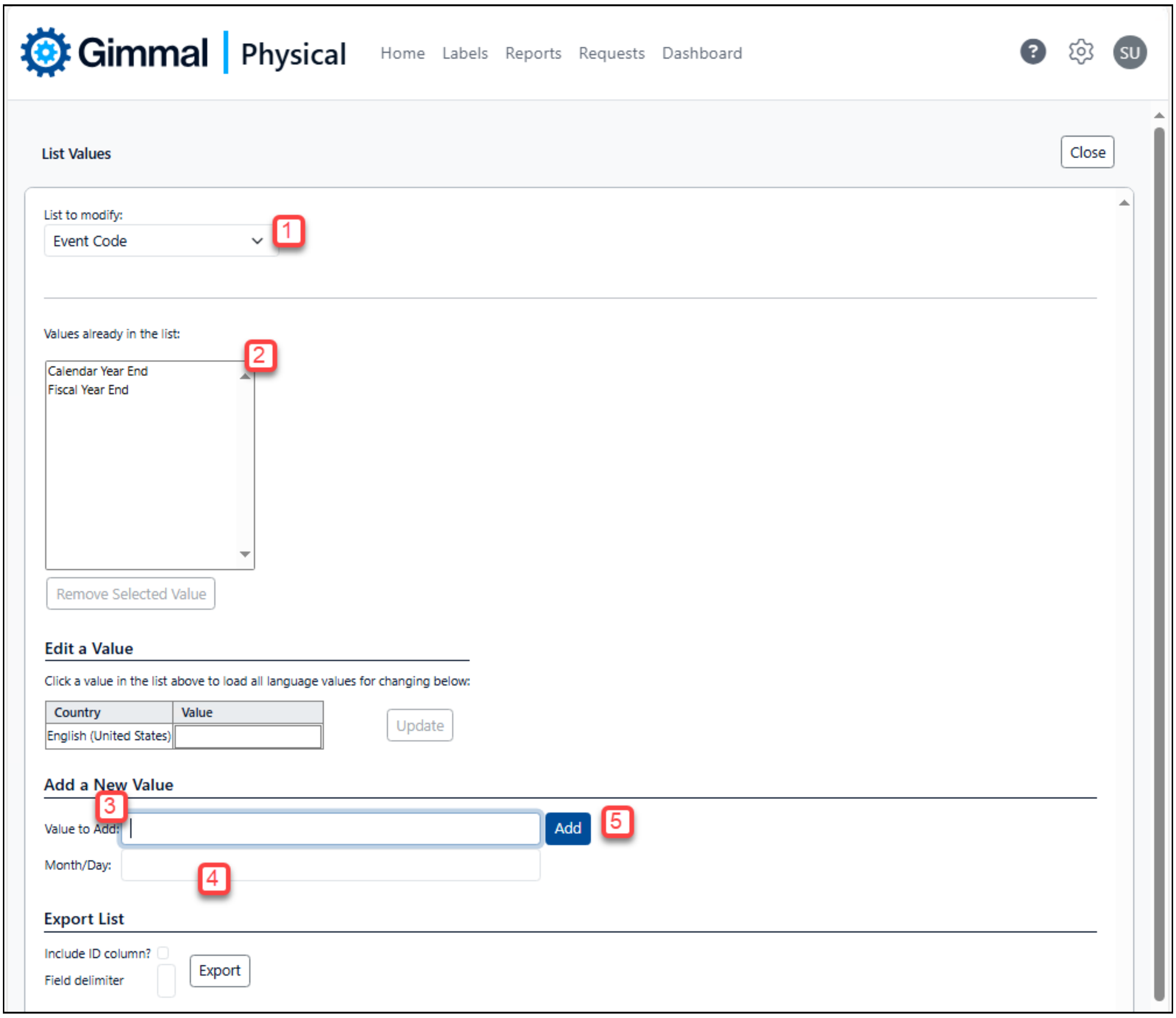
- Explanation of Dates (see page 122)
- Disposition Process (see page 124)
    - Identification Stage (see page 125)
    - Disposition Decisions (see page 128)
    - Aggregation Stage (see page 132)
    - Disposition Stage (see page 133)

1.4.2.1.3.1 Adding List Values

Certain Event Codes require additional information which is stored as part of the list value entry. List Values are managed in *Admin > Data > List Values*.

1. To add values to the Event Code, select the appropriate 'Event Code' from the "List to modify" drop-down box.
2. To modify an existing value, select it from the 'Values already in the list' control.
3. Type the name of the value you wish to add in the 'Value to Add' text box.
4. If the Event Code value has an associated Month and Day, enter them into the Month/Day text column in a MM/DD format (where MM = the static month of the event and DD = the specific static day of the month for the event)
5. Finally, click the 'Add' button or press the enter key.

25. mailto:support@gimmal.com



1.4.2.1.3.2 Questions

Please contact Gimmal Support at support@gimmal.com[26] with any questions.

1.4.2.1.3.3 Explanation of Dates

The Scheduled Disposition process. uses several dates that are associated with physical items:

Date From	Represents the oldest date of the contents of the physical item.
Date To	Represents the most current date (or newest) date of the contents of the physical item.

26. mailto:support@gimmal.com

Cut-off Date	Depending upon the retention schedule, this date will be automatically calculated by Gimmal Physical for a time-based schedule or a specific time + event-based schedule (calendar year) or it can be entered manually by the client. Note: The cut-off date is sometimes referred to as the Trigger Date, or Event Date.
Scheduled Destruction Date	The scheduled destruction date is automatically calculated if a retention schedule is selected, and certain conditions are met. Criteria used to calculate the scheduled destruction date are listed in 'Scheduled Destruction Date Calculation'
Actual Destruction Date	The actual date the physical item was disposed based on the final steps of the disposition process.

Scheduled Destruction Date Calculation

The automated calculation for the scheduled destruction date is determined by the retention schedule (see rules below) unless it meets the following conditions:

1. If **Override** is selected, no automatic calculations are performed by Gimmal Physical for the Scheduled Destruction Date. In this situation, the Scheduled Destruction Date must be manually entered.
    a. Note: The Override value does not determine the 'Cut-Off Date'.
2. If the item is attached to a Permanent Records Schedule, the Scheduled Destruction Date will never be populated.
3. Container Calculations: The method of calculation is dependent on the Setting 'Use Box data to determine Scheduled Destruction Date' as listed in Admin | Application Settings. This value is set at the time of application configuration and cannot be changed.
    a. If set to 'No', only Files will be used as the primary date for the calculation of the Box Scheduled Destruction Date. Absent the above conditions, when an item is a container (e.g., a Box) and has content items with dates (e.g., a File), the dates for the contents (the Files) act as the master to determine the dates of the source container (the Box).
        i. The Scheduled Destruction Dates of the container will be the maximum of the Scheduled Destruction Date of the contents unless otherwise noted below:
            1. If the deletion or transfer of the content items empties the container, the Scheduled Destruction Date will be set to null.
            2. If any content item has a null Scheduled Destruction Date, the container will also have a null destruction date.
        ii. Regardless of whether Scheduled Destruction Dates for the content items display a value, other dates will be set as follows to ensure search fidelity:
            1. Date From = Minimum 'Date From' of the content items in the container
            2. Date To = Maximum 'Date To' of the content items in the container
            3. Cut-off Date = Maximum 'Cut-off Date' of the content items in the container

iii. Several actions will force the recalculation of a source container. This includes:
    1. The **creation** of a new content item within a container
    2. Content items **deleted** from a container
    3. Content items are **transferred** into or out of a container.
    Note: If a content item is transferred, the container for both the source and the destination will be recalculated to conform to the remaining contents in the container.

b. If set to 'Yes', then the contents of a Box (e.g. Files) and the Box itself are used in calculations of the Scheduled Destruction Date of the Box. Whichever the greater of the Scheduled Destruction Date will be used for disposition. Absent Scheduled Destruction Dates, the calculations will be based on the greater of the Files or Boxes Date To fields.
    i. This option allows for Files without Scheduled Destruction Date to be included without affecting the Box Scheduled Destruction Date.
    ii. The greater of a File or a Box Scheduled Destruction Date or Date To will be used.
    iii. Users can enter a greater Scheduled Destruction Date or Date To on the Box than the Files entered.
    iv. This option is the default. It is very helpful for applications while file contents may not be entered into the system.

Retention Schedules & Dates

1. Time Based Retention Schedule is a schedule to store data for a specified interval. When a time-based retention schedule is associated with a physical item and the Date From and Date To are entered, the Gimmal Physical application automatically calculates a Cut-off Date. The Scheduled Destruction Date is then calculated based on the listed Year, Month, and Day values of the retention schedule.
2. Event+ Time Based Retention Schedule is a schedule to store data for a specified interval after a specified event has occurred. When this type of schedule is associated with a physical item* and the Date From and Date To are entered, the user must enter an Event (aka Trigger or Cut-off) Date. The Scheduled Destruction Date is then calculated based on the listed timespan (the Year, Month, and Day values) of the retention schedule.
   *There is an exception to this calculation for known events whose dates are consistently known (e.g. Fiscal Year-End or Calendar Year-End). In this case, the List Value month/day is used to calculate the cut-off date. With that date, the Scheduled Destruction Date is then calculated.
   Note: For this known events date calculation to work properly, the Event Code list value for options like Fiscal Year-End must be configured for the correct Month/Day. See the 'List Values' section below.
3. Event Based Retention Schedule is a rare schedule that is identical to the Event+Time above, however, the destruction will occur immediately after the event is triggered. The timespan, in essence, is 0.

1.4.2.1.3.4 Disposition Process

The Disposition Process within the Gimmal Physical application consists of three distinct stages: Identification, Aggregation, and Disposition.

Each one of these stages comes with its own set of reports and a specific set of requirements to be met to proceed through the disposition process.

1. The **Identification Stage** collects and organizes physical assets for Disposition. This stage creates batches based on conditions (e.g. filters, dates) set by the Record Managers. This stage also facilitates the disposition decisions process for these assets, either with the integrated automated process with dashboard links and disposition decision pages, or via reports which can be broken down by each functional unit, department, or organization involved.
2. The **Aggregation Stage** facilitates the collection of physical assets. It comes with the Disposition Picklist Report. There is a Picklist Report for each facility's housing records.
3. The **Disposition Stage** updates destruction dates and creates destruction reports to complete the process. It comes with the Certificates of Destruction for each functional unit, department, or organization involved.

> Disposition can be run at the container (e.g. box) or contents (e.g. file) level. This is determined at the time of application configuration.

For more information, please select the appropriate article from the list below:

- Identification Stage (see page 125)
- Disposition Decisions (see page 128)
- Aggregation Stage (see page 132)
- Disposition Stage (see page 133)

Identification Stage

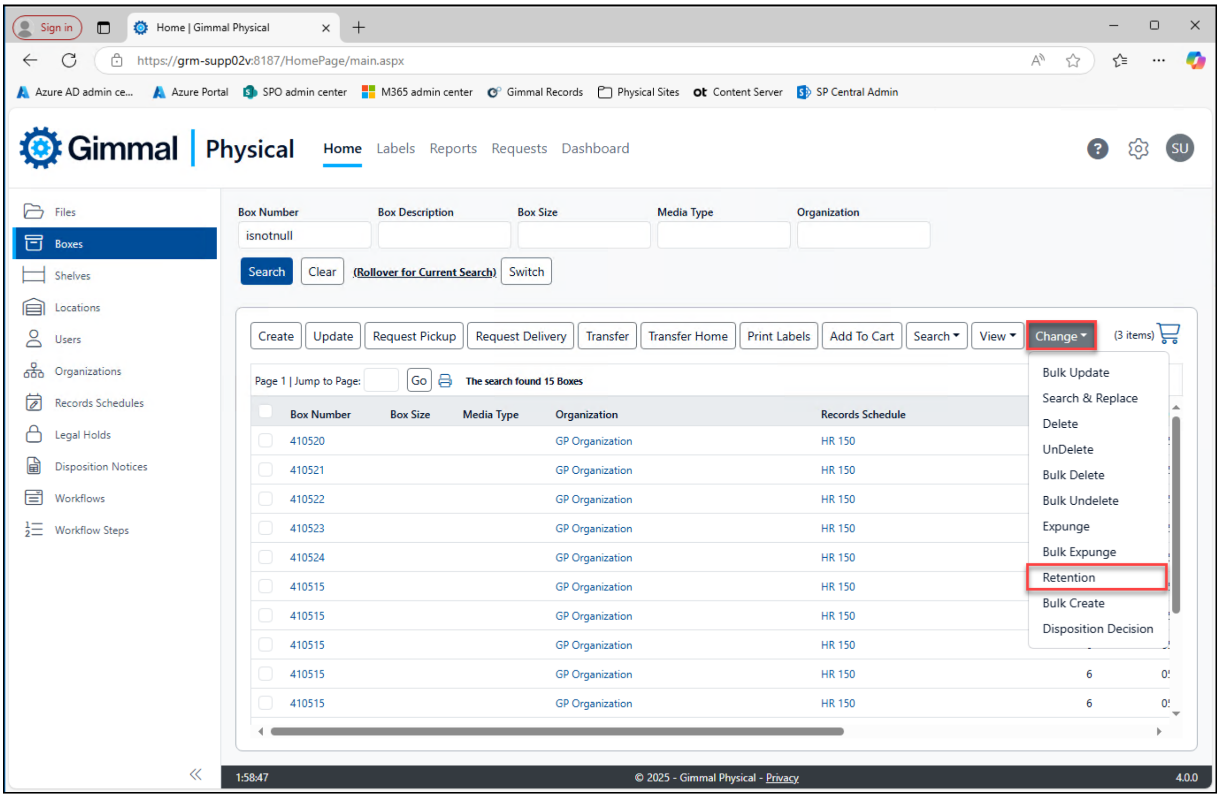
To be included in a disposition batch, an item cannot be on a Legal Hold or already deleted. The specific items must then meet the criteria of the specified Target Date and have a related Organization, Location, or both as chosen by the filters. If the criteria is only a specified Target Date (i.e. no filters are used), this identification will be run across all Organizations and Locations.

> In the examples below, Boxes will be used.

Create Batches

Proceed to *Boxes Tab* > *Change* > *Retention* to open the Retention page for Boxes.

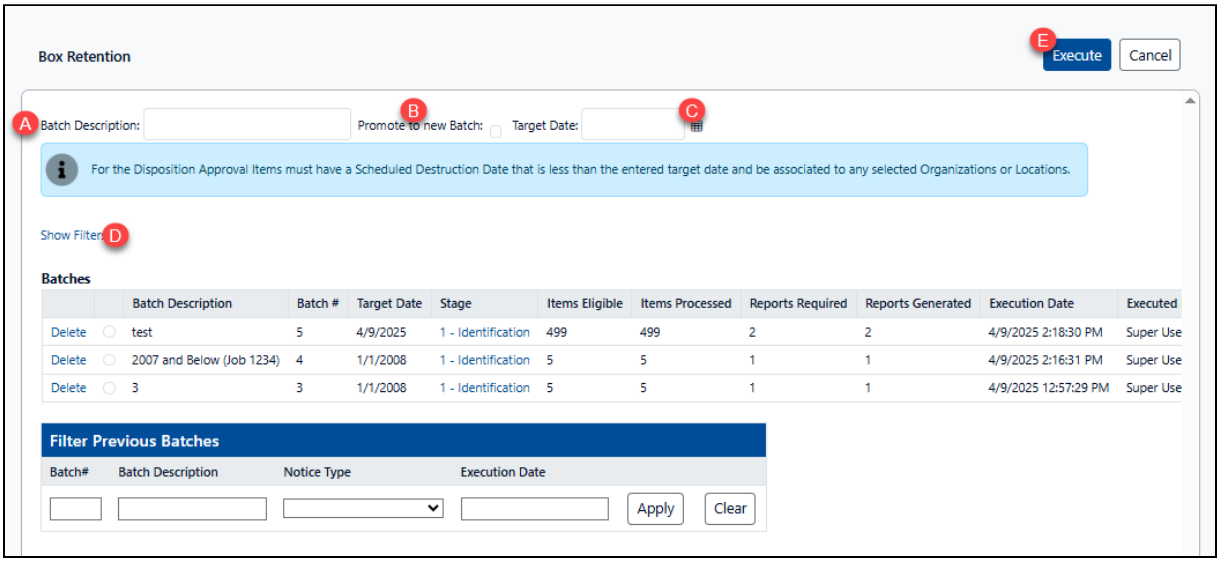
> Your application may have the link to the Retention Page in a different location or separate button.



1. Proceed to the Boxes Tab.
2. Select the Retention button to begin the disposition process.

The Box Retention view will open. At this point, batches may or may not have been run. A batch is simply a grouping of the items that meet this disposition criteria. Once a batch has been run, a grid will appear to manage the previously run batches or in process batches.

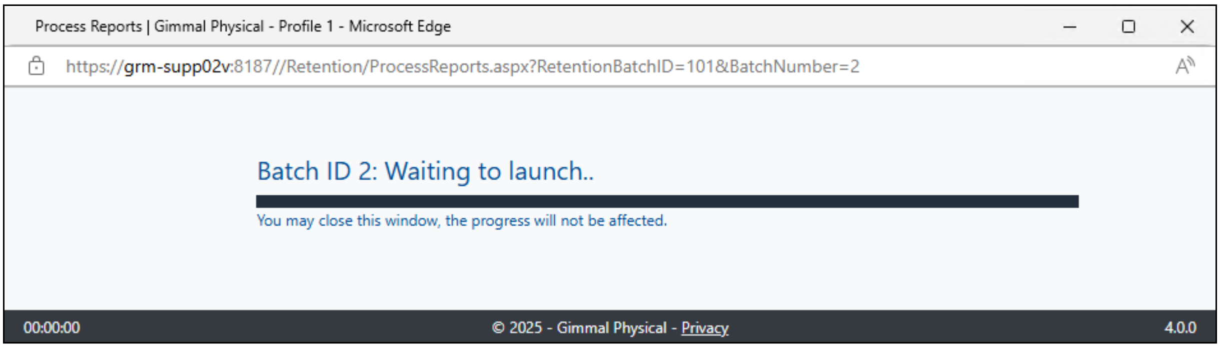
There is a helpful information bubble up at the top of the page that will highlight the step being activated within the process.



To begin disposition:

1. (Optional) Enter a Batch Description for an alternate identifier for a given batch (e.g. HR Q2, 2025) (A)
2. (Optional) Enable the 'Promote to new Batch' option if you wish for any items **not** disposed from previous batches to migrate to the new batch.
3. Enter the Target Date by typing directly or using the calendar control. (C)
4. (Optional) Choose one or more filters for one or more data fields by clicking the 'Show Filters' link. This will expand the control to enable the restriction of batches by one or more data filters (D):
    a. Organizations
    b. Locations (Note: Only Hub locations are available as a filter option for disposition)
    c. Record Schedules
5. Select Execute, then click 'OK' on the subsequent verification page. (E)

A pop-up will appear to let you know the process is being run.



Once the batch processing is complete, the Box Retention page will be updated with details of the new batch. A new, automated, batch number is assigned to all items which meet the disposition criteria.

At this point, Disposition Decisions (Approve, Reject, Remove)

Make Disposition Decisions

Once items have been collected in a batch, an optional step is to have an semi-automated or manual review to validate the items are eligible for disposition before any further steps are taken. See Disposition Decisions (see page 128) for more detail.

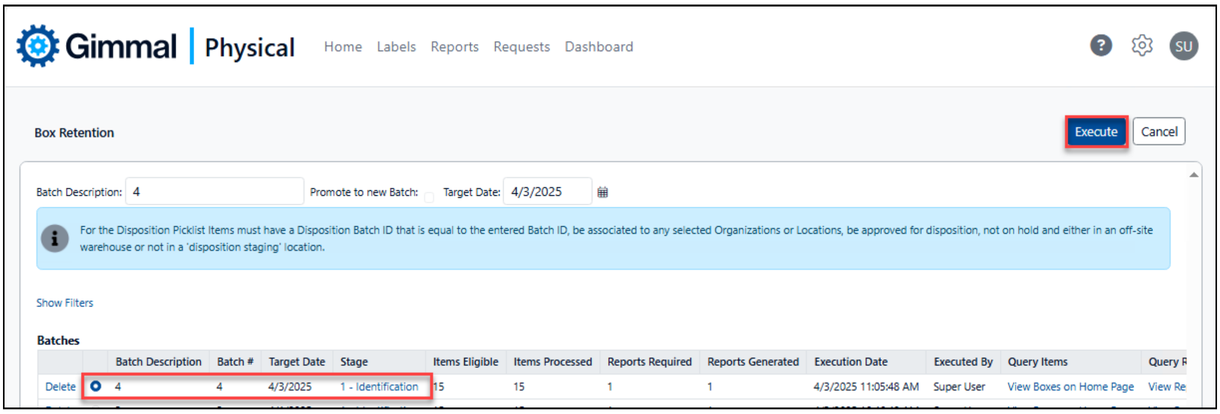
Helpful Tips for Identification

For more control, or a smaller number of boxes to approve:

- Use Filters - Organization, Location, Record Schedule or all three
- If a large backlog of items exists, run batches in years and months for easier management.
- To provide a count of items that are ready for deletion before initiating the retention process, search the appropriate Tab (e.g. Boxes) based on the following criteria:
    - Not deleted (Deleted set to false),
    - Not on a legal hold (Legal Hold set to false)

- Enter a particular scheduled date with the appropriate comparison operator (usually less than <).
- To see item level details, like the Disposition Notice showing the current Stage/Batch and the Disposition Approval checkbox, simply view the item (e.g. Box). Please note that changes to this information are recorded in history.
- If a File belongs in a Box but is checked out when the Box is destroyed through a Disposition Batch, the File is not deleted, but its Home Location is removed. The file will inherit a new Home Location based on the next Box it gets put into.

Move to the Next Stage: Aggregation



Select the radio button on the Identification Stage and click Execute to proceed to the next stage Aggregation (see page 132) for the selected batch.

Disposition Decisions

Many disposition processes require review before an item can be disposed. Gimmal Physical offers a variety of options to handle disposition decisions (Approve, Reject, or Remove). They can be handled automatically (Assumed Approvals (see page 114)), with assistance from the application via automated notifications and the Disposition Decision page, ad hoc with queries to remove items from a batch, or using a Report.

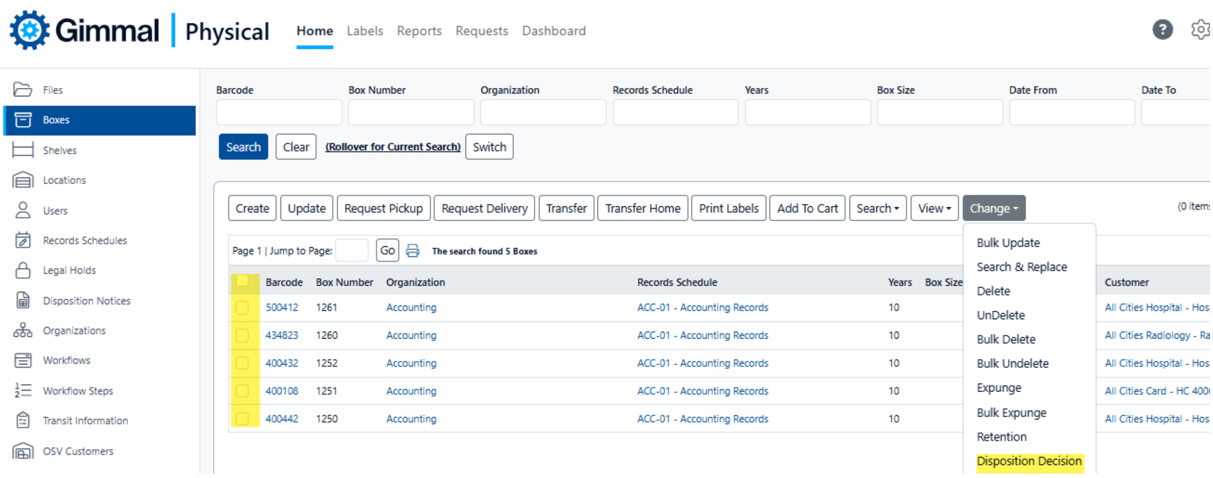
Assumed Approval

Some disposition processes lend themselves to automatically approving items for disposition without any intervention. Gimmal Physical can accommodate this use case by creating a Workflow that has ‘Assumed Approval’ enabled, and assigning that Workflow to the appropriate Record Schedule. Once the items reach their scheduled destruction date and the identification process is run, they will automatically be approved by the system (although there is an option for a delayed duration to give time for review). See Workflow (see page 114)for more information.

Disposition Decisions

Using the steps (see page 116)outlined in a Workflow (see page 114), approvers can be assigned to review items ready for disposition. Once the appropriate items are listed in the home page grid, one, multiple, or all records can be selected and approved or rejected using the ‘Disposition Decisions’ action button from the Home Page Grid.

The Dashboard (see page 49)contains a view for Disposition. This features a one-stop set of queries and links to aid users and record managers in finding exactly the disposition information they seek in the Home Page Grid.

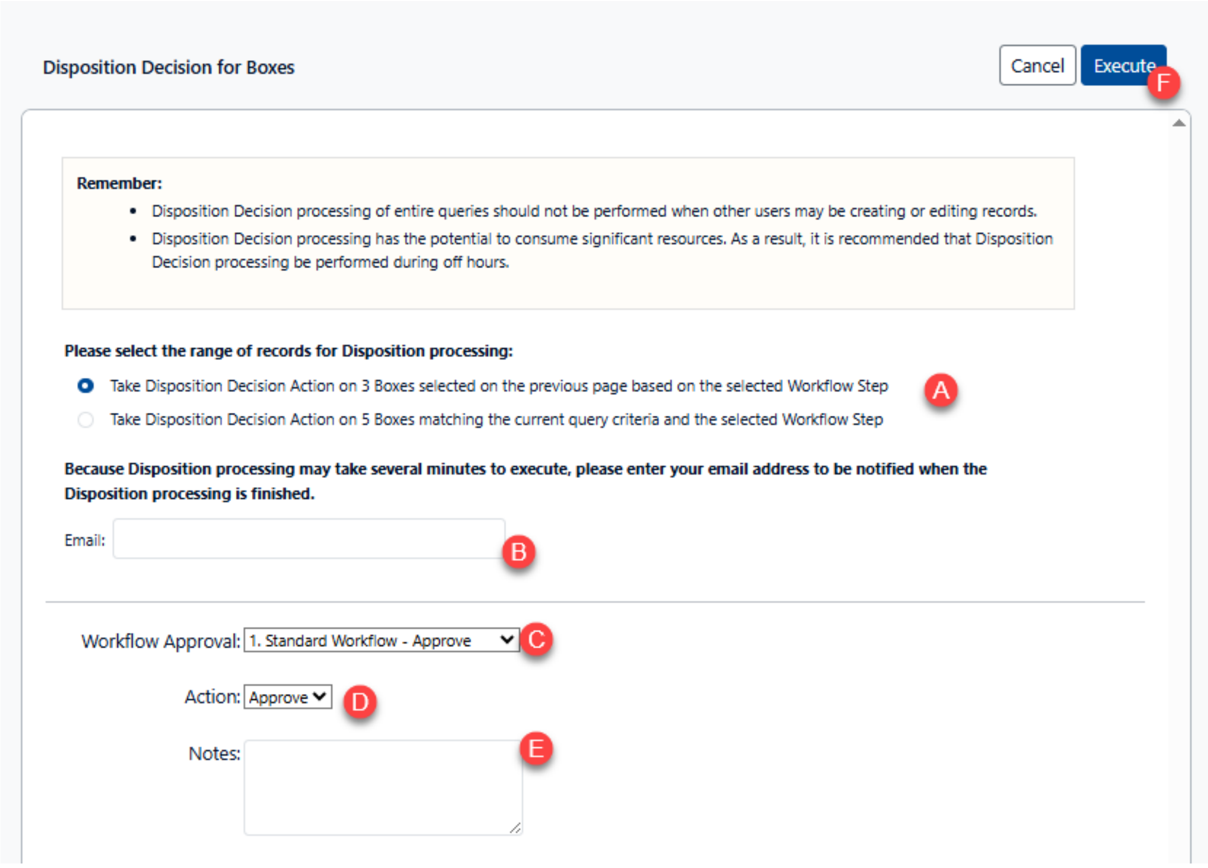


To approve or reject items for disposition from the Home Page Grid,

1. Query up items of interest by either using the Search or using the Dashboard's (see page 49)Disposition view.
2. Select one or more items. If no items are selected, all items will be targeted by default
3. Choose 'Change | Disposition Decision'. (Reminder: the option may have a different label or a different location in your implementation of Gimmal Physical)

Disposition Decision Page

This dedicated page allows users to take actions on the selected items or the entire query from the Home Page Grid.

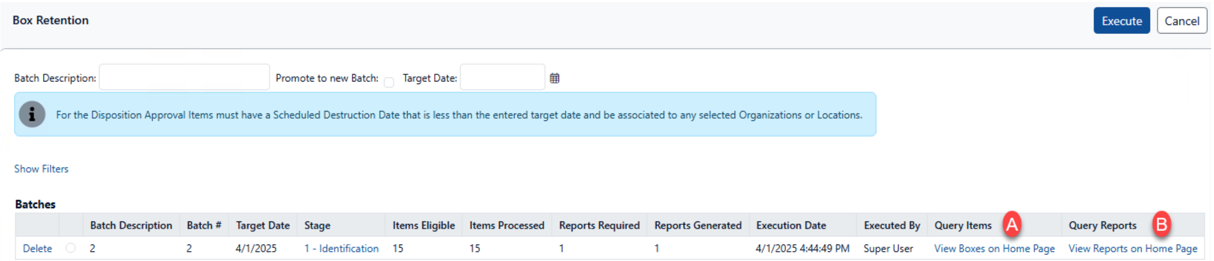


To make decisions for disposition:

1. Choose the scope of this action (A). Note: The default selected is related to whether or not items were selected on the Home Page Grid. However, you have the option to choose a different range of records for processing.
2. (Optional) Because this process is resource-intensive, it may take a while to complete processing of the records. By entering an address in the email field (B), a notification will be sent when the process completes.
3. The current workflow and step will be listed under Workflow Approval (C)
4. Choose the action to take on the range of records selected (D). This is a drop-down box with the values:
   a. Approve: The items will proceed to the next step or stage in the disposition process.
   b. Reject: The items in the scoped range will be taken out of the disposition process, but they will remain in the batch and can be promoted to other batches. To remove them from the batch, you can do a bulk update and remove the batch number and batch description. However, they will be valid for the next time disposition is run with the same conditions. To keep them out of further disposition, associate the items with a different record schedule or put them on legal hold.
5. (Optional) Field to add to each item processed in the range of records. The note will accompany the record as it gets stamped with the user information and timestamp.

6. Choose Execute (F) to complete the decision-making process.

Manual Options

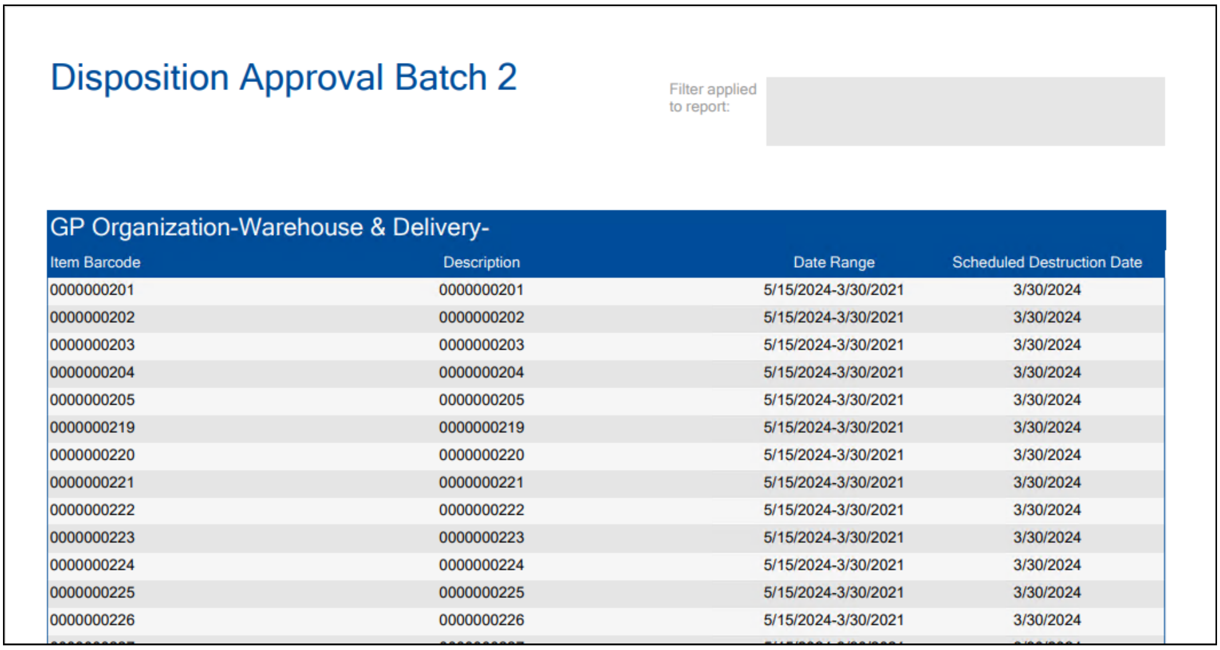


Removing Items from a Batch

Items can be removed from the batch if needed (e.g., they should not be destroyed or need further review). This can be completed by using the linked queries on the retention page (Query Items column (A)) or the Dashboard to show the list of items in the batch. Then use the update options (single or in bulk) to remove the batch number for the specified boxes.

Using Reports for Approvals

If the automated or integrated options for approval will not work for your process, you can either export a list of items or use one of the default Disposition Approval Reports. These reports can be queried for review from the Query Reports column (B) from the batch list.



Disposition Approval Batch 2

Filter applied to report:

GP Organization-Warehouse & Delivery-

Item Barcode	Description	Date Range	Scheduled Destruction Date
0000000201	0000000201	5/15/2024-3/30/2021	3/30/2024
0000000202	0000000202	5/15/2024-3/30/2021	3/30/2024
0000000203	0000000203	5/15/2024-3/30/2021	3/30/2024
0000000204	0000000204	5/15/2024-3/30/2021	3/30/2024
0000000205	0000000205	5/15/2024-3/30/2021	3/30/2024
0000000219	0000000219	5/15/2024-3/30/2021	3/30/2024
0000000220	0000000220	5/15/2024-3/30/2021	3/30/2024
0000000221	0000000221	5/15/2024-3/30/2021	3/30/2024
0000000222	0000000222	5/15/2024-3/30/2021	3/30/2024
0000000223	0000000223	5/15/2024-3/30/2021	3/30/2024
0000000224	0000000224	5/15/2024-3/30/2021	3/30/2024
0000000225	0000000225	5/15/2024-3/30/2021	3/30/2024
0000000226	0000000226	5/15/2024-3/30/2021	3/30/2024

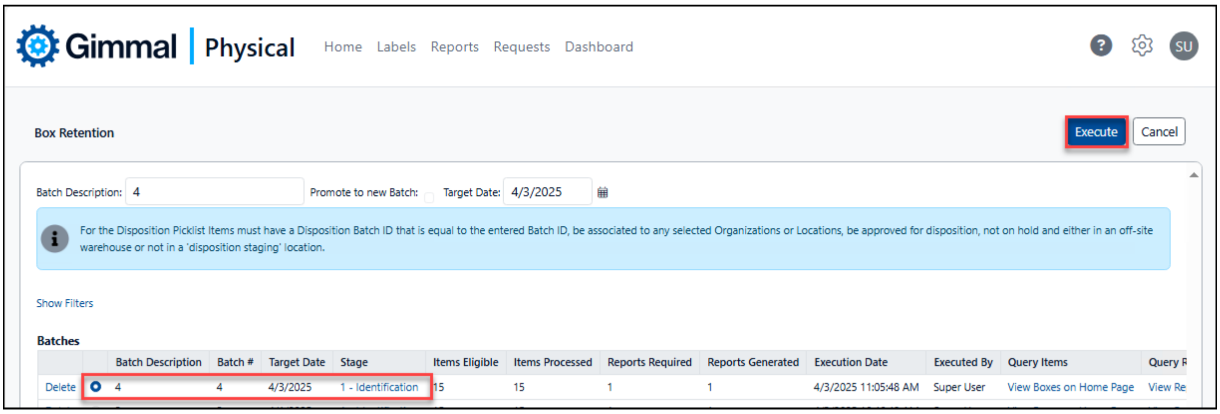
Batch numbers have been designated on each item and are ready for approval.

Notes for Disposition Decisions

1. Some clients require a user to access the Gimmal Physical application and approve the disposition of the boxes. This is most effectively accomplished via the Dashboard (see page 49)Decisions view. However, users always have the option to use standard queries to approve items individually or a selected set via Update or Bulk Update.
2. Other clients share the reports via email or hard copy to the appropriate personnel for responses. In this case, the Gimmal Physical Administrator manually enters the approvals into the application based on the responses they receive. The Dashboard or Home Page Grid search options can be leveraged to pinpoint the exact records for update.
3. Multiple approval levels can be added using Workflows (see page 114)with multiple Workflows Steps[27]

If approvers can see counts, but not take Disposition Decisions, please remember that the Schedule Status secured list on the Retention Schedule tab trickles down to the individual item tabs (e.g., boxes). What this means for retention is that the appropriate Disposition Decision action for each list value in the Schedule Status list must be enabled for those users to perform approvals or rejections.

Aggregation Stage



Select the radio button on the Identification Stage and click Execute to proceed to the Aggregation (see page 132) stage for the selected batch.

All boxes approved for disposition should be physically moved from the shelves and set aside to a Disposition Staging Location. To facilitate this activity, the Disposition Picklist Report can be used.

27. https://gimmal.atlassian.net/wiki/spaces/ALT/pages/12877881/Workflow+Steps

Disposition Picklist Batch 4

Filter applied to report:

Barcode	Description	Date Range	Scheduled	Current Location
0000000219	0000000219	5/9/2019 - 3/30/2021	3/30/2024	
0000000220	0000000220	5/9/2019 - 3/30/2021	3/30/2024	
0000000221	0000000221	5/9/2019 - 3/30/2021	3/30/2024	
0000000222	0000000222	5/9/2019 - 3/30/2021	3/30/2024	
0000000223	0000000223	5/9/2019 - 3/30/2021	3/30/2024	
0000000203	0000000203	5/9/2019 - 3/30/2021	3/30/2024	M - 3 - G -
0000000204	0000000204	5/9/2019 - 3/30/2021	3/30/2024	M - 3 - G -
0000000205	0000000205	5/9/2019 - 3/30/2021	3/30/2024	P - 06 - 6 -
0000000201	0000000201	5/9/2019 - 3/30/2021	3/30/2024	Super User
0000000202	0000000202	5/9/2019 - 3/30/2021	3/30/2024	Super User
0000000224	0000000224	5/9/2019 - 3/30/2021	3/30/2024	Super User
0000000225	0000000225	5/9/2019 - 3/30/2021	3/30/2024	Super User
0000000226	0000000226	5/9/2019 - 3/30/2021	3/30/2024	Super User
0000000227	0000000227	5/9/2019 - 3/30/2021	3/30/2024	Super User
0000000228	0000000228	5/9/2019 - 3/30/2021	3/30/2024	Super User

Transfer boxes to the Disposition Staging Location within the Gimmal Physical application. This can be accomplished by a barcode scanner or by manually updating the system.

If you are using off-site storage vendor (and not using any Gimmal Off-Site Storage Connectors), you should provide this information to your off-site vendor for disposition.

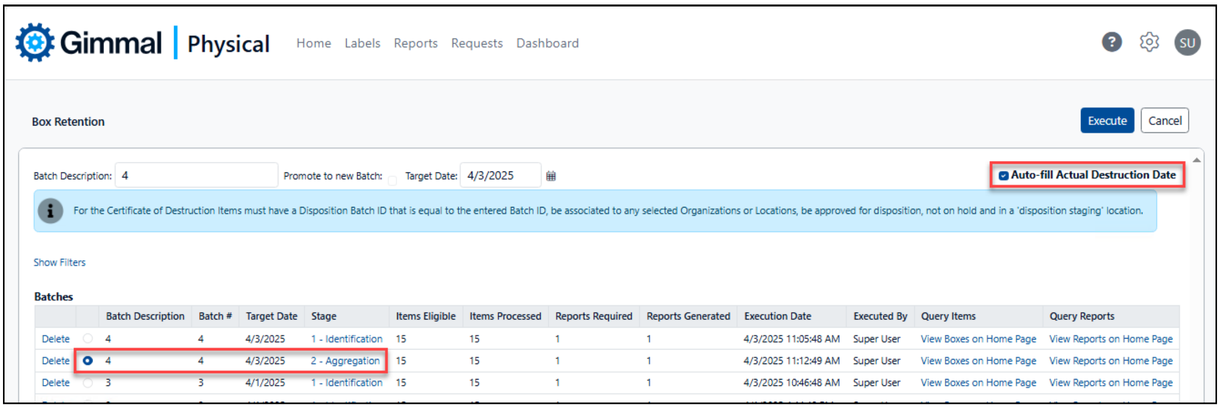
Helpful Tips

- *A barcode scanner can be used to transfer the boxes to the Disposition Staging Location. This is an opportunity to confirm that all the correct boxes have been pulled for destruction.*
- *There is a helpful information bubble up at the top of the page that will highlight the step being activated within the process.*
- *A Disposition Staging Location needs to be created within the application under Locations and the checkbox "Is Disposition Staging Location" needs to be enabled for the chosen Location(s).*

Disposition Stage

Ready to Proceed: *Boxes Tab > Change > Retention*

Select the radio button on the Aggregation Stage for the batch you wish to dispose of, then click the 'Execute' button to move to the Disposition Stage.



Gimmal Physical uses the settings on the 'Auto-fill Actual Destruction Date' option at the top right of the Retention page to manage the Actual Destruction Date value on the records subject to disposition:

When this stage is initiated, if the 'Auto-fill Actual Destruction Date' is:

- Enabled
  - Any items with Actual Destruction Date fields that **do not** contain a value will be stamped with the **current date** as the Actual Destruction Date.
  - Items that have valid values for Actual Destruction Date fields will **not b**e changed.
  - All approved items in the selected batch will be deleted from the system.
  - All approved items in the selected batch will be included in the Certificate of Destruction.
- Disabled
  - Only approved items with an Actual Destruction Date with a valid value (i.e. not empty) will be marked 'Deleted'.
  - Values for Actual Destruction Date fields will **not b**e changed.
  - Other items which did not have an Actual Destruction Date:
    - Will remain in the batch
    - Will not be included in the Certificate of Destruction.
    - Can be disposed of once they have an Actual Destruction date, but each set will generate a separate Certificate of Destruction.
    - The execution date/time or item deletion date/time can be matched with the batch number and report to locate the specific Certificate of Destruction to the items run step.
    - If a completely new batch is run, the leftover items (i.e. those which do not have an Actual Destruction Date to qualify for the earlier batch) will be included with the new batch. They will need to go through the process again, including approvals.

- The default for the 'Auto-fill Actual Destruction Date' value can be changed on the Administrator | Application Settings page. However, the processing will follow whatever is set on this retention page.

- Depending on the volume of data being disposed of, this process can take a significant amount of time.

Once the disposition process has been completed, the Certificate of Destruction can be accessed via the 'View Reports on Home Page' link which accesses the Disposition Notices Tab.

- Reports are in PDF format and are time-stamped when the process is complete.
- Only items with Actual Destruction Dates are included with the Certificate of Destruction (whether manually entered or automated).
- Scheduled and actual destruction dates are shown in separate columns.

Certificate of Destruction Batch 4

Filter applied to report:

GP Organization-Warehouse & Delivery-

Item Barcode	Item Description	Date Range	Scheduled	Actual
0000000201	0000000201	5/9/2019 - 3/30/2021	3/30/2024	4/3/2025
0000000202	0000000202	5/9/2019 - 3/30/2021	3/30/2024	4/3/2025
0000000203	0000000203	5/9/2019 - 3/30/2021	3/30/2024	4/3/2025
0000000204	0000000204	5/9/2019 - 3/30/2021	3/30/2024	4/3/2025
0000000205	0000000205	5/9/2019 - 3/30/2021	3/30/2024	4/3/2025
0000000219	0000000219	5/9/2019 - 3/30/2021	3/30/2024	4/3/2025
0000000220	0000000220	5/9/2019 - 3/30/2021	3/30/2024	4/3/2025
0000000221	0000000221	5/9/2019 - 3/30/2021	3/30/2024	4/3/2025
0000000222	0000000222	5/9/2019 - 3/30/2021	3/30/2024	4/3/2025
0000000223	0000000223	5/9/2019 - 3/30/2021	3/30/2024	4/3/2025
0000000224	0000000224	5/9/2019 - 3/30/2021	3/30/2024	4/3/2025
0000000225	0000000225	5/9/2019 - 3/30/2021	3/30/2024	4/3/2025
0000000226	0000000226	5/9/2019 - 3/30/2021	3/30/2024	4/3/2025
0000000227	0000000227	5/9/2019 - 3/30/2021	3/30/2024	4/3/2025
0000000228	0000000228	5/9/2019 - 3/30/2021	3/30/2024	4/3/2025

1.4.2.2 Synonym Support

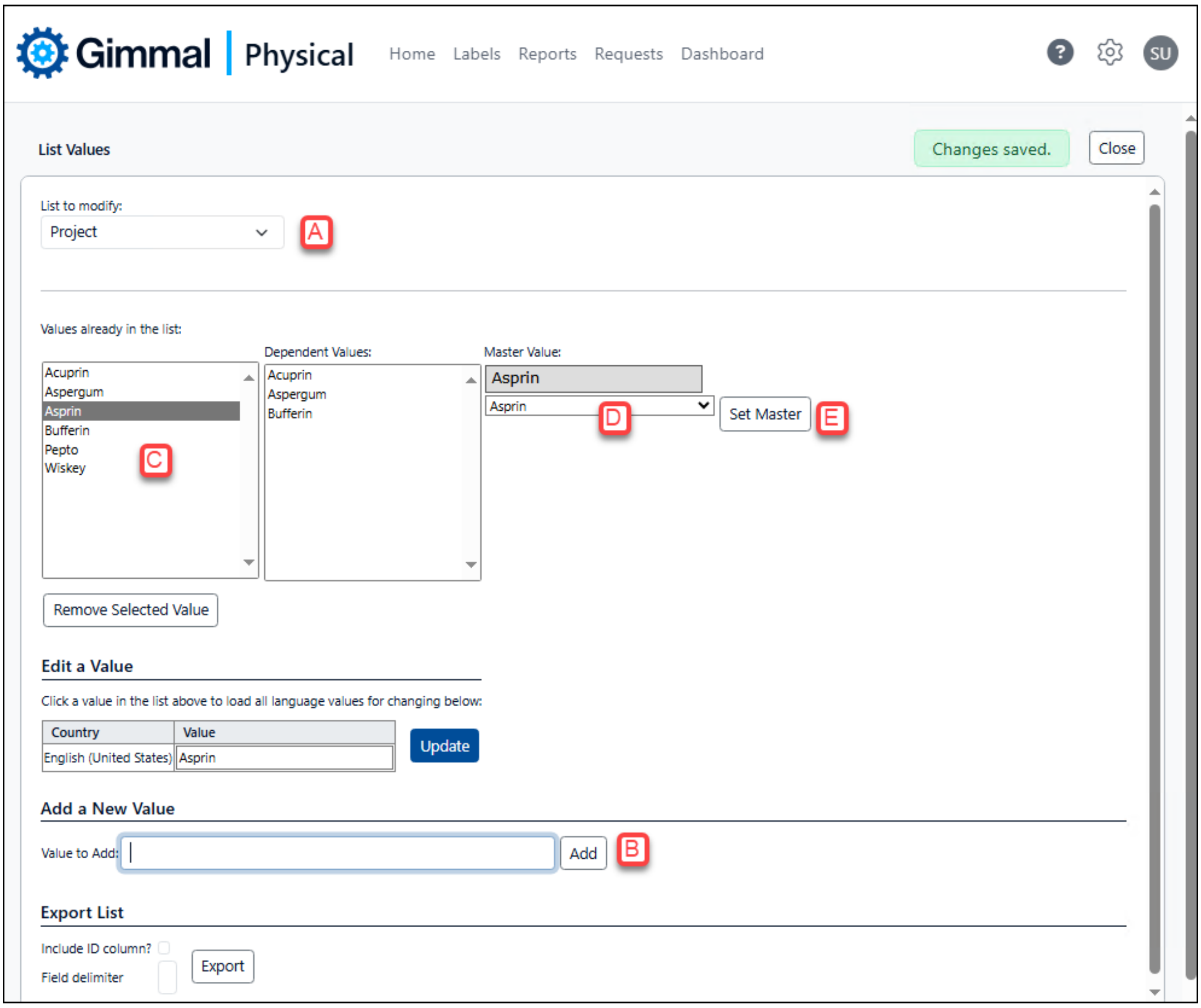
StGimmal Physical supports finding items by alternate names or descriptions. There are two aspects to supporting Synonyms - relating the items that are synonyms to one another and finding those values. To cover a variety of use cases, Gimmal offers both synonym list value controls and synonym tabs.

- **Synonym List** control is helpful if you wish to have related values in a single list with no extra data required.
- **Synonym Tab** is recommended if you need additional fields to help define the individual values (e.g. region)

- This functionality is not available in versions below 3.15.
- Both Synonym options require advanced configuration in addition to the steps below - they cannot be enabled via the user interface alone.

1.4.2.2.1 Synonym List

After enabling Gimmal Physical to use Synonym List values in the advanced configuration, the Synonym List will appear as lists to modify in the Admin | List Values page. When chosen from the dropdown of 'Lists to modify', additional options are used to declare values of the list as 'dependent' on the key or 'Master' value. Any records with list values that are related to one another through the master/dependent relationship will be found and returned together as part of the same search.



1.4.2.2.1.1 Managing Synonyms

1. Select the list that was created as a Synonym List (A)
2. Add all values into the list individually using the 'Value to Add' form and clicking 'Add' B)

3. To choose the 'Master' or key value:
   a. Select a synonym from the list of values. (C)
   b. Choose the key value from the list of values, under the 'Master Value' heading. (D)
   c. Click the 'Set Master' button. (E)
4. Repeat for each dependent value.

To remove the relationship between two values:

1. Select the dependent value
2. Choose itself or another item in the list for the master value from the list of items (D)
3. Click 'Set Master' (E)

- No value can be removed from a list if it is in use in a record.
- A value is its own master if none is set for it.
- When selecting a master value from the values, its dependent values will appear in the 'Dependent Values' box.
- There can only be one Synonym list value control per tab.

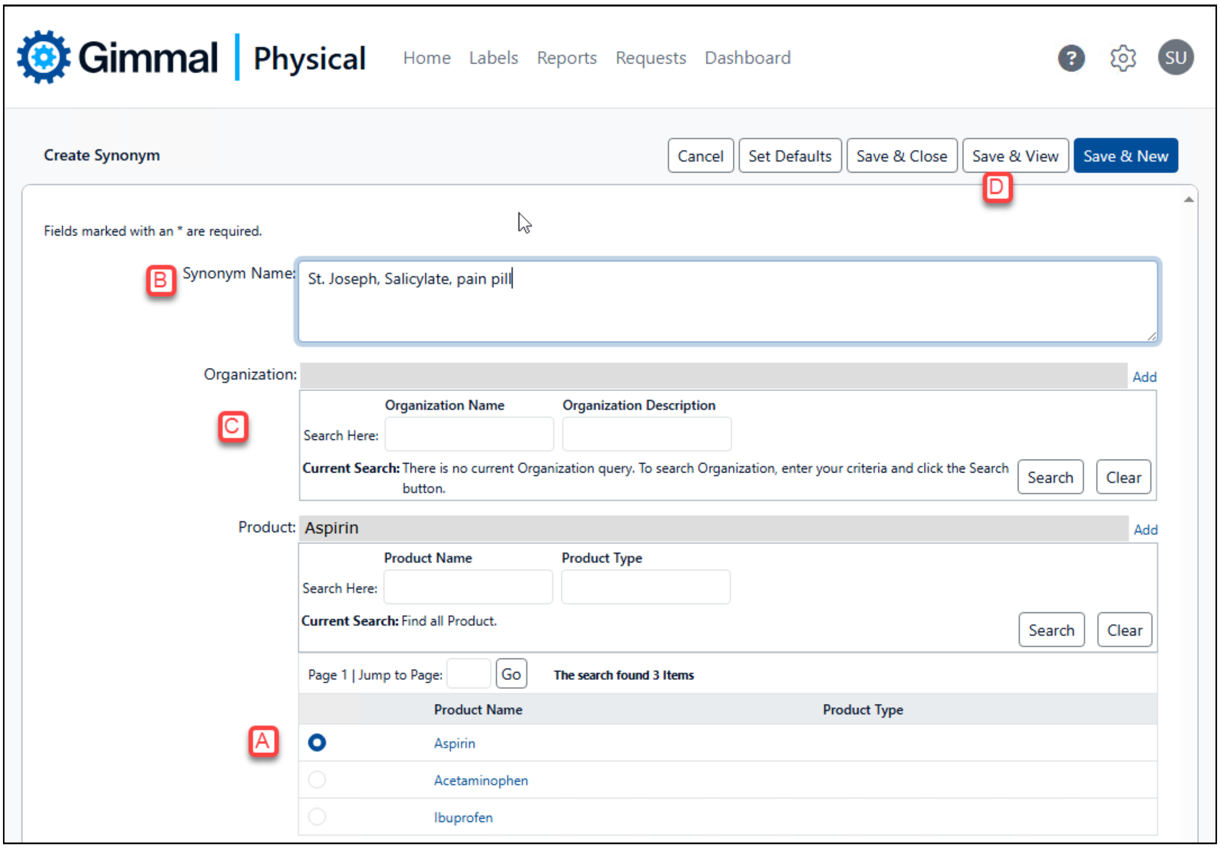
1.4.2.2.1.2 Searching for Synonyms

The values selected in the synonym list can be searched like any other list field in the search fields. The only difference is that if any of the related values are responsive to the search criteria, they all will be returned.

1.4.2.2.2 Synonym as a Tab

The Synonym tab appears after enabling the functionality in the advanced configuration. The fields on this tab are highly dependent on the chosen configuration, but the linked tab (Product, in the example below) will be one of the associated fields.

1.4.2.2.2.1 Creating the Synonyms

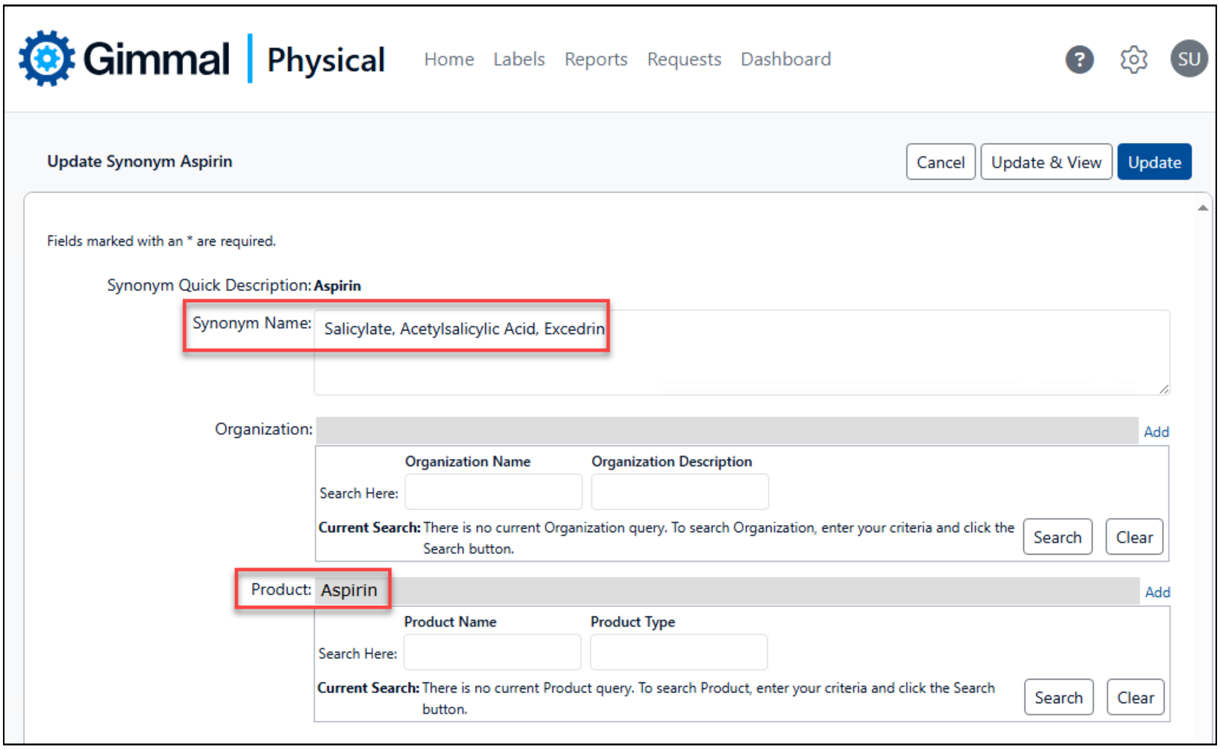


To create synonyms, the core values must first be added on the associated Tab (e.g. Product = Asprin). When creating a new set of synonyms for that product:

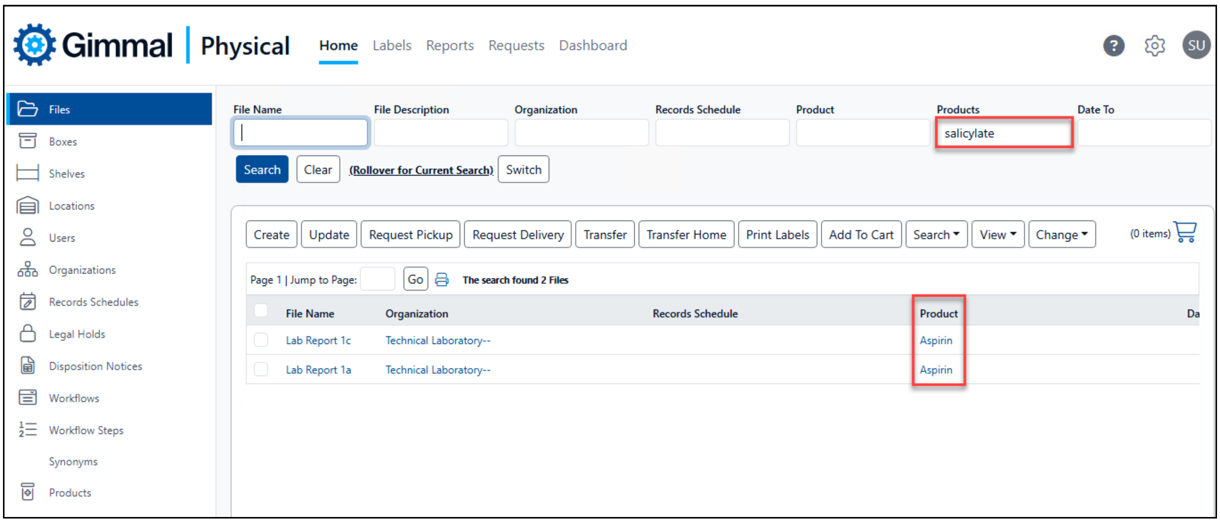
1. Create a new value on the Synonyms tab,
2. Choose the Product which needs the Synonyms (A)
3. Add all associated synonyms in the 'Synonym Name' field. (B)
    a. Multiple values should be separated by a comma
4. If other fields are present (e.g. Organization or Region), select the appropriate values to associate with these synonyms. (C)
5. Click one of the 'Save' options to save the product/synonym relationship. (D)

1.4.2.2.2.2 Searching for Synonyms

Any synonyms associated with the item via the Synonyms tab can be found for any item with related values. In the example below, Product is a property for the File tab. Any file record whose product is listed as one of the synonyms will be returned as part of a quick search for the Product field.



19 Product *Aspirin* with alternate names (synonyms)



20 A search for a synonym of Aspirin returns File with that associated product

- Gimmal Physical currently supports only a single Synonym Tab related to a single item.

1.4.2.3 Pattern Sequencing

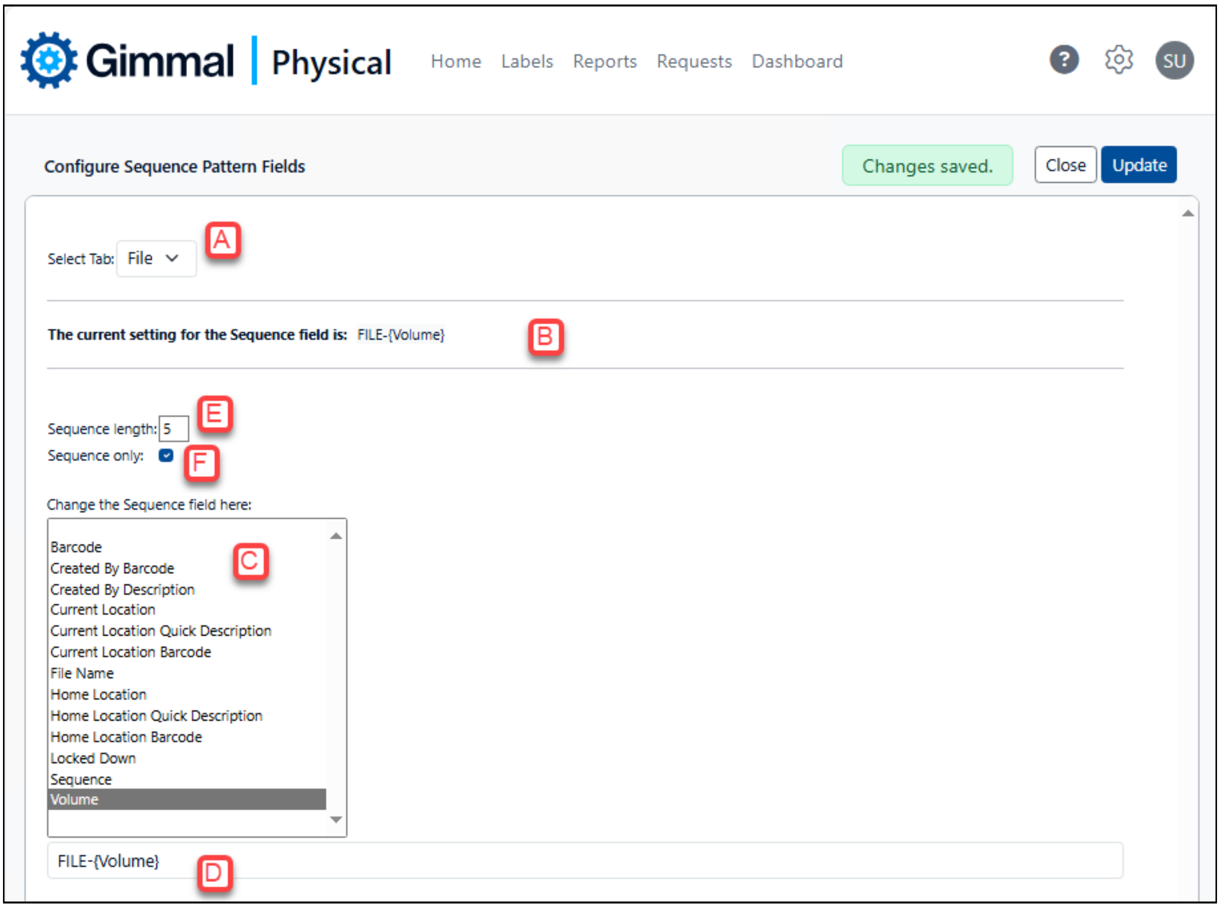
Gimmal Physical offers options to create field values in a new record which are based on a pattern defined by other fields in the item being created. For example, requirements may include a descriptive field that reflects the sequence number of that box for that year in that organization.

Once enabled, the configuration options for the sequence pattern field are accessible via the 'Configure Sequence Pattern' option in the Configuration section of the Administration page. Existing values from any **required** field can be used to render the pattern for the new value. Additionally, a special field called 'Sequence' is available as a numeric increment for any unique pattern created by the selected tab fields. Once set, these options are used to create the sequence field value when a tab item (e.g. box or file) is created via UI or import.

- Once set, a pattern sequence value does not change, even if the underlying values are changed. (See 'Home Location Exception ' below).
- There can be only one Pattern Sequence field per tab.
- Advanced configuration is needed to enable the Pattern Sequence tab.
- The {Sequence} token must be present to populate a value in the sequenced pattern field.

Home Location Exception
If the '***Home Location***' field is used as part of the Pattern Sequence, the underlying value ***will*** change when the home location of the item changes. Furthermore, the default [Home Location] field will not be present in the resulting pattern, and other fields ***cannot*** be used as part of the pattern.
Note:

1. This functionality is intended to be used for Files in container home locations only (e.g. Boxes or Shelves) and has not been validated for any other use case.
2. The only field value which exhibits this behavior is '***Home Location***'. Neither of the other, similarly named, field values ('Home Location Barcode' or 'Home Location Quick Description') will initialize this functionality.



To set a new pattern, or revise an existing pattern:

1. Choose the tab that contains the pattern field you wish to add or update from the 'Select Tab' dropdown field (A). This list will only contain tabs that have been configured (via advanced configurations) to have pattern sequence fields.
2. If a pattern has already been configured for the selected tab, it will appear in the Current Sequence section (B).
3. Text and fields can be entered in the 'New Pattern' box (D) to create a new pattern.
    a. Add text or characters by entering them directly into the 'New Pattern' text box. In the example above, 'BOX-' will appear on every new value created in this pattern sequence field.
    b. Additional text characters can be entered at any point in the pattern. In the example above, hyphens are used to delineate all field and sequence values.
    c. To enter a field value into the new pattern, double-click on the field in the list box (C). The field name will show up in the new pattern box with curly brackets, (e.g. *{Box Year}*) indicating the placement of that field value in the pattern for any sequence value created in a new record.
    d. To enter a placeholder for the Sequence in the pattern:
        i. Double-click the 'Sequence' option in the list box. This adds the sequence to the pattern.

ii. A field will appear for 'Sequence Length' (E). This determines the total length of the sequence value using zeros as padding. For example, a length of 6 and a sequence of 38 will result in a sequence value of 000038.

e. To include the numeric sequence only (without associated field values), choose the checkbox entitled 'Sequence Only' (F). The numeric value will be based on the selected fields, but these field values will not be shown as part of the final value field.

4. Click the 'Update' button to save the new pattern. All new records for this tab from this point forward will use the new pattern.

- When updating an existing pattern, only day forward records will reflect the new pattern.

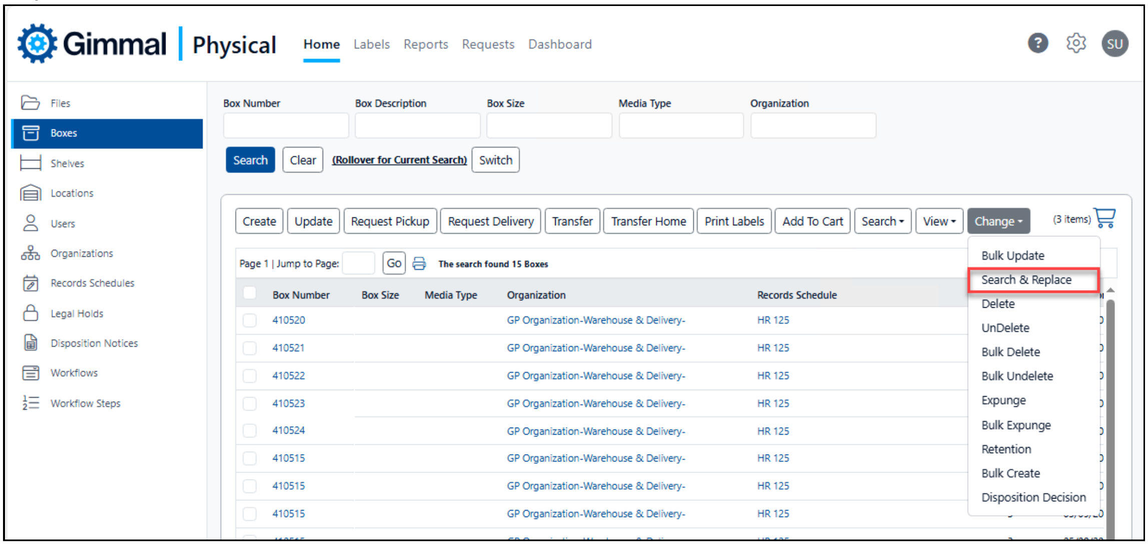
1.4.2.4 Search and Replace

The Search and Replace feature allows you to search for a specific word or phrase within a data field for a specified tab and replace it with a different word or phrase.

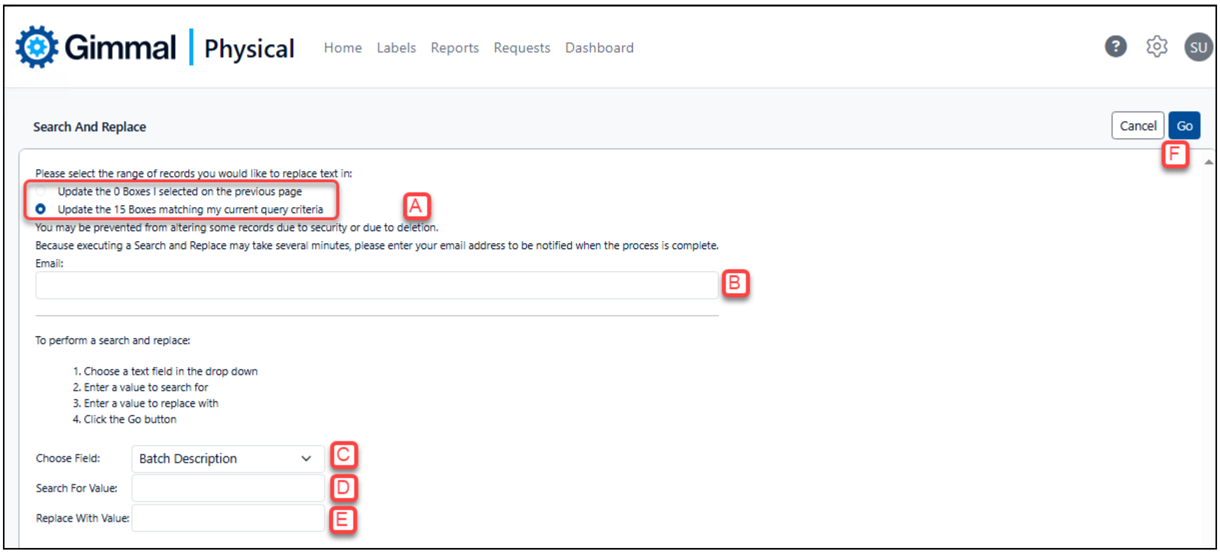
This process, depending upon the exact change you make, may be irreversible. Execute with care!

To execute a Search and Replace:

1. Choose a Tab and, if needed, run a search to pull up the records you seek to change.
2. Select the specific records upon which to perform the Search and Replace. Not making a selection will choose all records.
3. Select the 'Change' action button and choose 'Search and Replace'. This opens the Search and Replace screen.



4. On the Search and Replace page, choose to either update the selected records or all records from the previous query. (A)
5. Since the Search And Replace can be a resource intensive activity, Gimmal Physical will execute this in a separate process and email you the results. Enter your email in the Email text box. (B)
6. Choose the data field for which you wish to replace values from the Choose Field drop down list. (C)
7. Enter a value to search for in the Search For Value text box. (D)
8. Enter the replacement value in the Replace With Value text box. (E)
9. Click the Go button. (F)
10. If an email was entered in Step 5, you will be notified by email when the Search And Replace is complete.



Additional search options can be found in the Search Overview (see page 95).

1.4.2.5 Configure Label Profiles

This topic is part of the Printing Labels tutorial. Click here[28] to view.

Label Profiles are templates that can be reused for custom label specifications. They are used to specify the following:

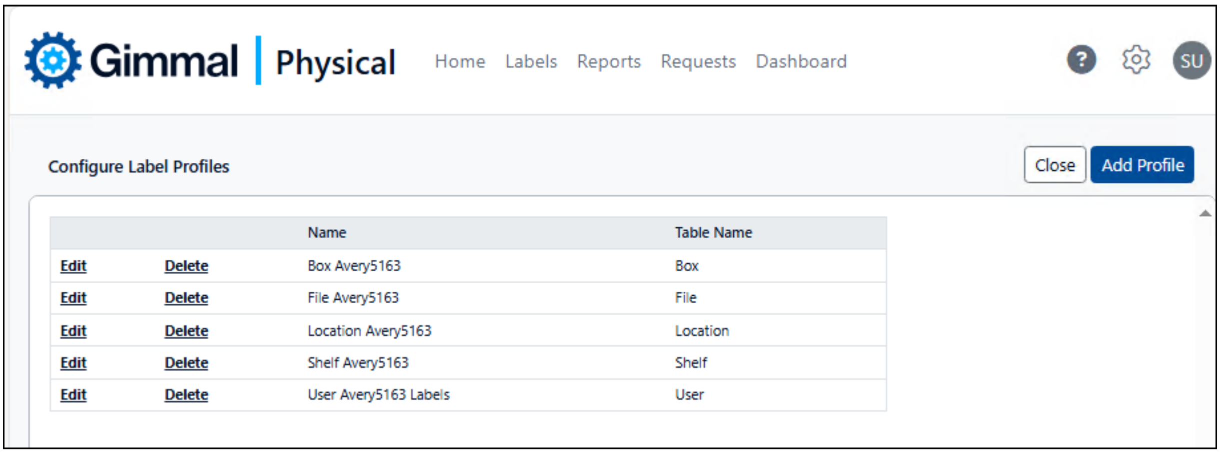
- **Data Tab**: The item type/data tab the label is for. This is usually Files or Boxes but could be for other item types in your application.
- **Design File**: The design file contains the overall dimensions, layout, and other design properties of the label.

28. https://gimmal.navattic.com/ql108di

- **Number of labels per page**: The number of labels to be printed per page, corresponding to the label stock being used.
- **Profile Name**: Name of the label profile to find and use later.
- Which fields for the selected data tab are printed on the label

1.4.2.5.1 Basic Label Profiles

Out of the box, Gimmal Physical includes several basic black and white label profiles, based on the Avery 5163 label stock.

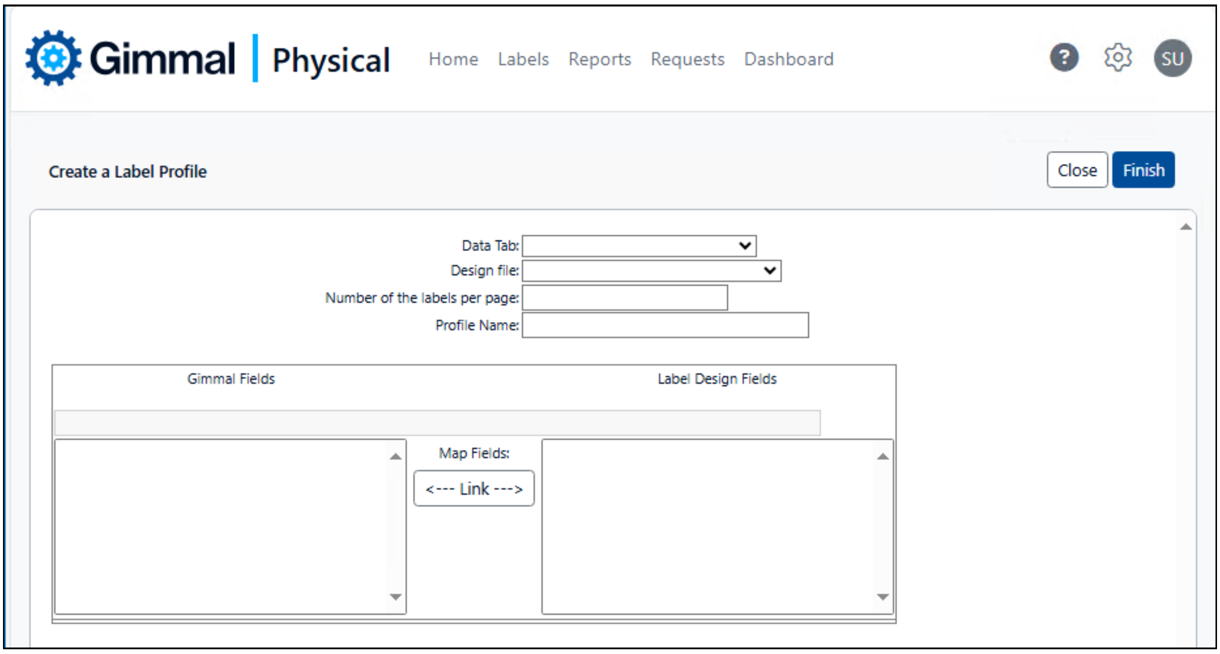


21 *Included Basic Label Profiles*

1.4.2.5.2 Custom Label Profiles

Gimmal Physical offers the option to create your own label templates using different stock or different layouts. To do so, you must first configure a new label profile.

1. Browse to Admin->Configuration->Label Profiles, this will take you to the Configure Label Profiles page (see image above).
2. Click on the **Add Profile** link to open the **Create a Label Profile** screen.



22 Creating a new label profile

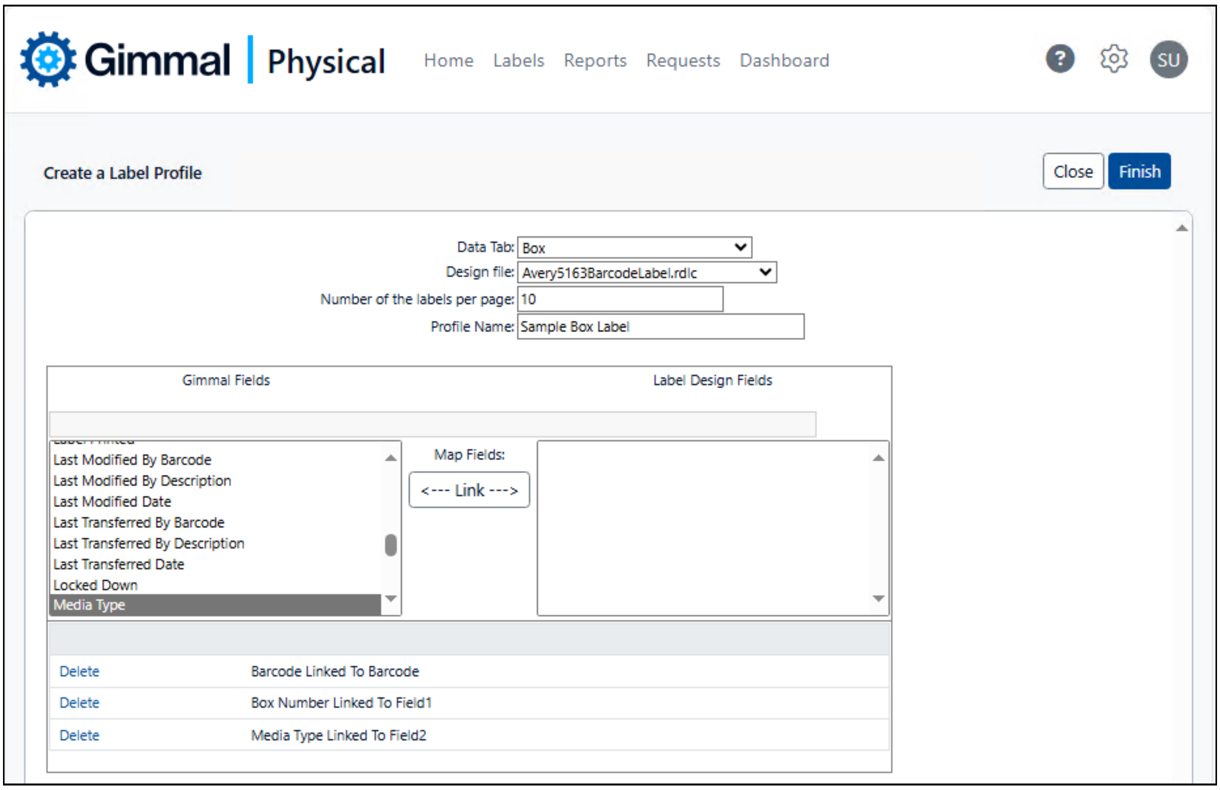
3. Enter/select the information for the new profile as indicated below.

- **Data Tab**: Choose the type of item you are creating a label profile for. The **Gimmal Fields** pane on the left will populate/update as you change Data Tab selections.
- **Design File**: Select the appropriate design file to be used for this label profile. The list of design files presented reflects only what has already been uploaded to the application. The **Label Design Fields** pane on the right will populate/update as you change Design File selections.

> To add a new design file:
>
> - Save the file (see note below) to your local computer.
> - Browse to Admin->Configuration->Label Design Files
> - Click **Choose File** and browse to the saved design file.
> - Click **Upload File** to add the design file to the list of available files.
> - A new label profile may now be created based on the uploaded design.
>
> Creating new label design files is performed outside of the Gimmal Physical application and is beyond the scope of this documentation. If you require a new label design, please reach out to your Gimmal Account Manager or Gimmal Support.

- **Number of labels per page**: Enter the number of labels per page, corresponding to the label stock you have procured. Note that even though the label size is the same, the labels per page might differ due to the format, i.e., a standard letter page size vs. a roll of labels.

- **Profile name**: Enter a meaningful name. This is especially important if you have different labels for the same item type.
- **Label fields**: Map the desired fields in Gimmal Physical to the appropriate field in the label design. Highlight matching fields in each pane and then click the **<--Link-->** button.



23 Final Profile configuration

- It does not matter in which order you create field mappings.
- If you need to remove/redo a field mapping, simply click the Delete link at the left.
- You can only map a single field from Gimmal Physical to each label field.
- You can map a single field from Gimmal Physical to multiple label fields.

4. Click **Finish** to save the Label Profile configuration.

1.4.2.6 Connectors & Integrations

Gimmal Physical offers a number of connectors and third party integrations to help you make the most of your records management system.

Use the tree view on the left or the links below to navigate to the guide of interest.

1.4.2.6.1 FileConnect Guide

1.4.2.6.1.1 Contents

1.4.2.6.1.2 Overview

FileConnect allows users to configure a service that automatically imports correctly formatted files to facilitate the automation of imports into Gimmal Physical.

FileConnect is comprised of 2 components:

1. FileConnect (user interface)
2. FileConnect Service (Windows service)

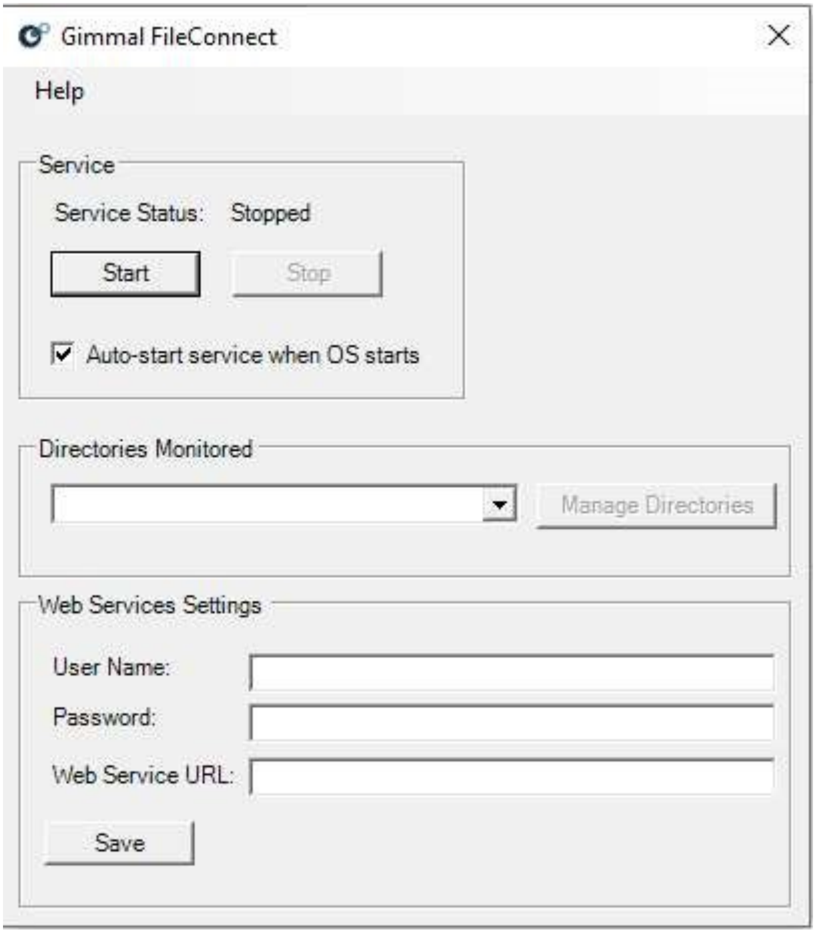
FileConnect allows users to:

- Start and stop the FileConnect service
- Change web service settings
- Configure monitored directories

The FileConnect Service monitors the directories specified in the user interface for files that match certain criteria. When a new file is detected in a monitored directory, the FileConnect Windows service will use the Gimmal web service to upload the file and import the data it contains into the Gimmal web application.

1.4.2.6.1.3 Windows Service

1. In File Connect start the Windows service by clicking Start or stop the service by clicking Stop. (The service can also be controlled through the Windows Service application)
2. The Status of the service is displayed (Running or Stopped) in FileConnect.
3. To have the service started automatically check the checkbox ‘Auto-start service when OS starts’.



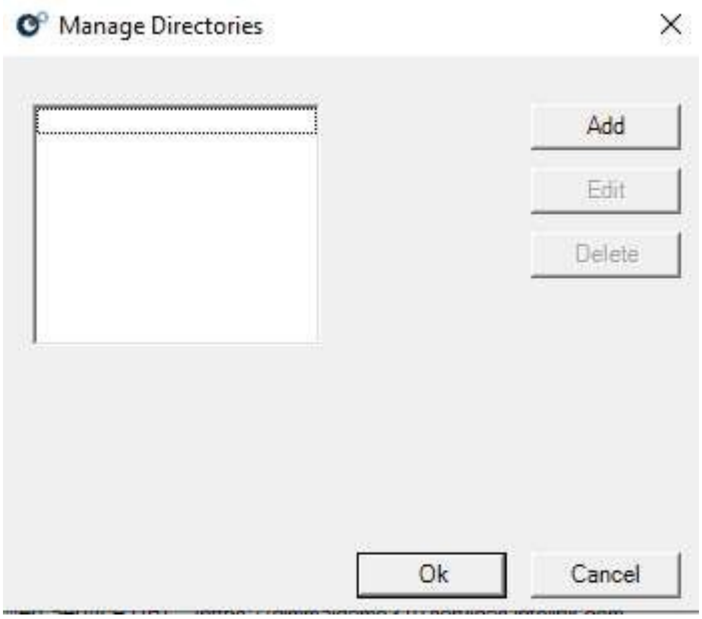
Web Service Settings

- Username – the username for connecting to the web service.
- Password – the password for connecting to the web service.
- Web Service URL – the URL for the Gimmal Physical web service
- Web Service settings are saved by clicking on the Save button below the Web Service URL.

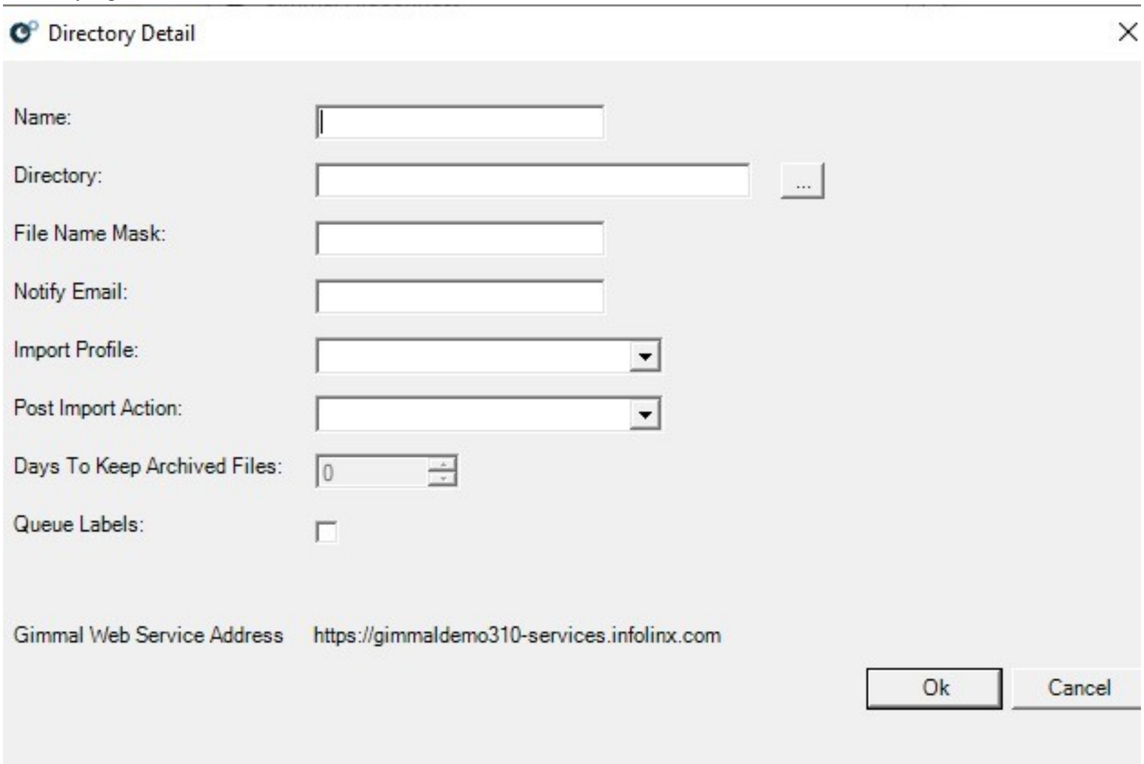
1.4.2.6.1.4 Manage Directories

1. Click Manage Directories to see the directories that FileConnect is managing.

2. To add a new monitored directory click the Add button. To edit or delete a monitored directory click the corresponding button.



3. When adding or editing a monitored directory, fill in the required information on the Directory detail page.



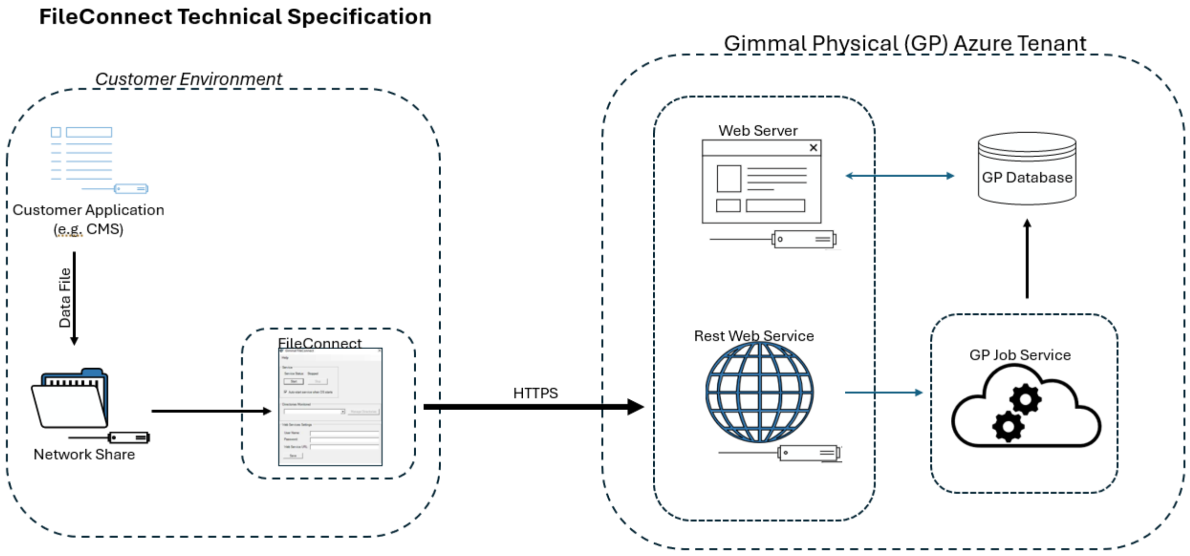
Directory Settings

- Name – the display name (in FileConnect and notification emails) of the monitored directory.

- Directory – the full path of the directory to monitor.
- Path can be a local folder or network share in UNC path.
- If a UNC path is used, the user identity running the FileConnect service must have read/write access to the network share.
- File Name Mask – an expression used to filter the files within the directory. * is used as a wildcard. For example, if the mask is *.txt, then only .txt files will be processed. A value of *.* will result in all files being processed.
- For a complete list of rules, read the documentation: https://docs.microsoft.com/enus/dotnet/api/system.io.filesystemwatcher.filter?view=netframework-4.5.2. One notable exception is that FileConnect requires a mask value to be provided, so empty string (i.e. blank) will not work.
- Notify Email – the email address to which data import notifications will be sent.
- Interchange Profile – the import profile to use when importing data from files in this directory.
- Post Import Action – Archive or Delete; Archive will put processed files in the Processed folder (a subdirectory under the monitored directory); Delete will remove processed files.
- Days to Keep Archived Files – If Archive is selected for Post Import Action, then this setting governs how many days to keep files in the Processed folder. After the specified number of days has elapsed, the old files will be deleted. If Delete is selected for Post Import Action, then this setting will be disabled.
- Queue Labels – determines whether labels will be queued in the Gimmal web application when new items are created from files in this directory.
- Click OK to save the monitored directory or click Cancel to discard changes and exit.

1.4.2.6.1.5 Data Flow

Files are first created in the customer environment. Typically these files are generated via an automated output from a customer application (e.g. a CMS system). These files are stored on a local network share. FileConnect is installed behind the firewall with access to the location where the automated files are stored. It periodically checks the defined location for any new files. Once the file is found, FIleConnect uses the configured credentials to transfer the file via HTTPS to a Rest Webservice that sits on a virtual machine in the dedicated customer Azure tenant for Gimmal Physical. The Gimmal job service parses the file and inserts the data into the Gimmal Physical database. The Gimmal Web servers host the Gimmal Physical web application which then reflects the records imported during this process.



1.4.2.6.2 PortableConnect User Guide

Please use the links on the right to help navigate through this document.

1.4.2.6.2.1 Getting Started

Gimmal Physical PortableConnect is a barcode scanning application that allows users to use a portable scanner to perform actions in Gimmal Physical.

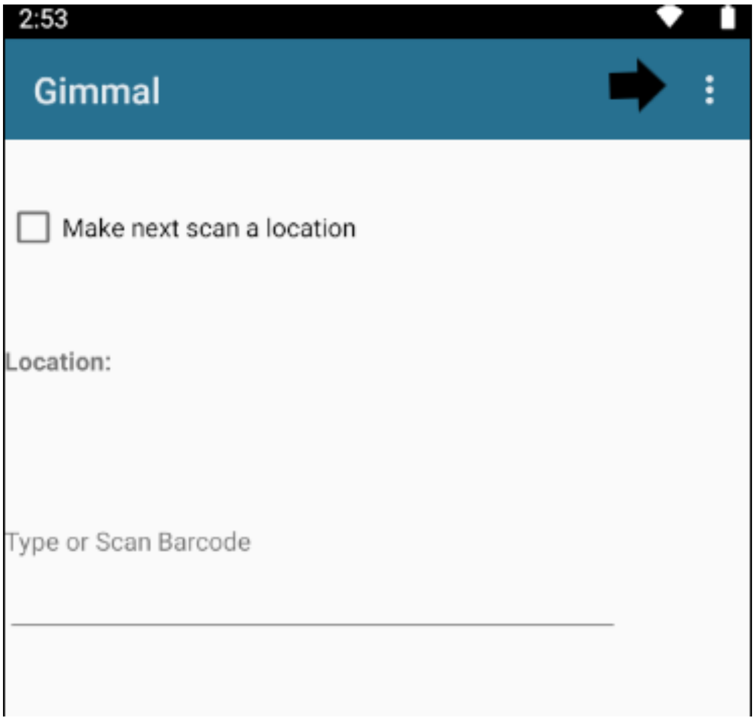
> Note: Neither RFID nor Bluetooth can be used with the PortableConnect version for Android 13 or 14.

To start using PortableConnect:

1. Unlock the portable device.
2. Tap on the Gimmal Physical PortableConnect app icon on the home screen

    • If the app icon is not on the home screen, search the device or open the app drawer and scroll until it is found.

Once in the app, tap the vertical ellipses (three dots) in the upper right corner and select the desired tab.



1.4.2.6.2.2 PortableConnect with Web Services

If using PortableConnect with Gimmal Physical Webservices, you will need:

- URL for the Gimmal Physical Webservice
- Valid Gimmal Physical login credentials

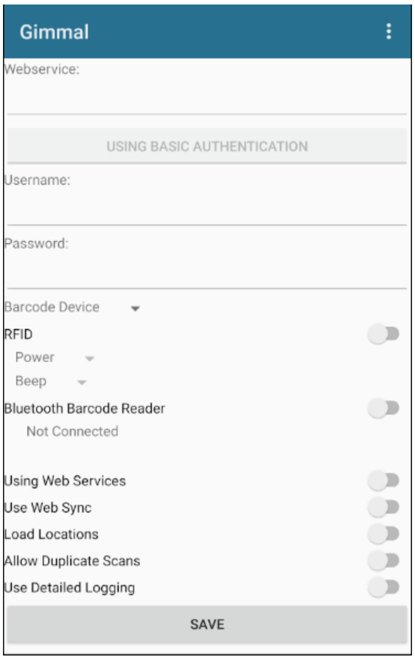
To use:

1. Go to the Preferences tab.
2. Enable ‘Using Web Services’ and ‘Using Web Sync’
3. Enter the Webservice URL in the ‘Webservice:’ textbox.
4. Enter the Gimmal Physical credentials in the ‘Username:’ and ‘Password’ textboxes respectively.
5. Tap on the ‘Save’ button at the bottom of the page.

1.4.2.6.2.3 PortableConnect with RFID

To enable using PortableConnect with RFID:

1. Go to the Preferences tab.
2. Ensure webservices are enabled. See PortableConnect with Webservices.
3. Select the appropriate device from the ‘Barcode Device’ dropdown.
4. Enable ‘RFID’.

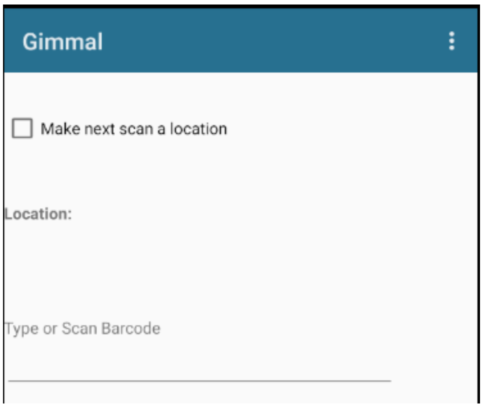


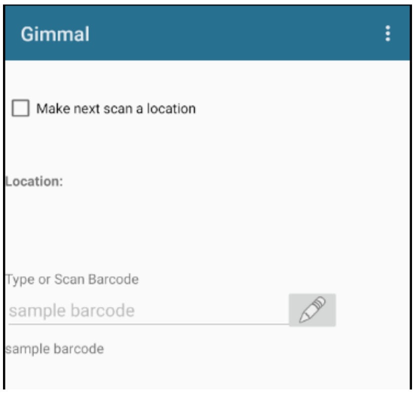
Additional Configuration

Allow Duplicate Scans: If this setting is enabled, PortableConnect will not automatically remove multiple scans of the same item.

1.4.2.6.2.4 Data Collection

To begin scanning barcodes, select Collection from the menu.





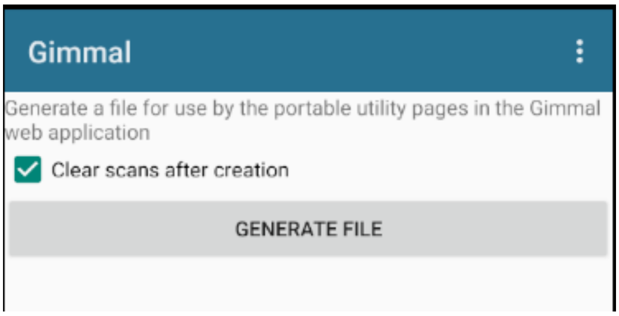
1. Set the Transfer Destination:
   a. Check the ‘Make next scan a location’ checkbox.
   b. Scan the barcode of the location to transfer items.
   c. If the location is successfully set, you will see the barcode scanned next to the ‘Location:’ label.
2. Scan the barcodes of the items to be transferred:
   a. If the barcode label is damaged or won’t read, you can type it manually into the ‘Type or Scan Barcode’ textbox. The barcode will be logged once the enter key is hit.
3. Repeat the above process for all items to be scanned.

1.4.2.6.2.5 Data Upload

To generate a file of the transfers for upload to the Gimmal Physical application:

1. Select Create File from the menu.
2. To remove scans from the log, check the ‘Clear scans after creation’ checkbox.
3. Tap the ‘GENERATE FILE’ button.

A text file named TransferData.txt will be created in the Install Directory/Gimmal Physical Portable that can be uploaded through the Gimmal Physical Web UI.



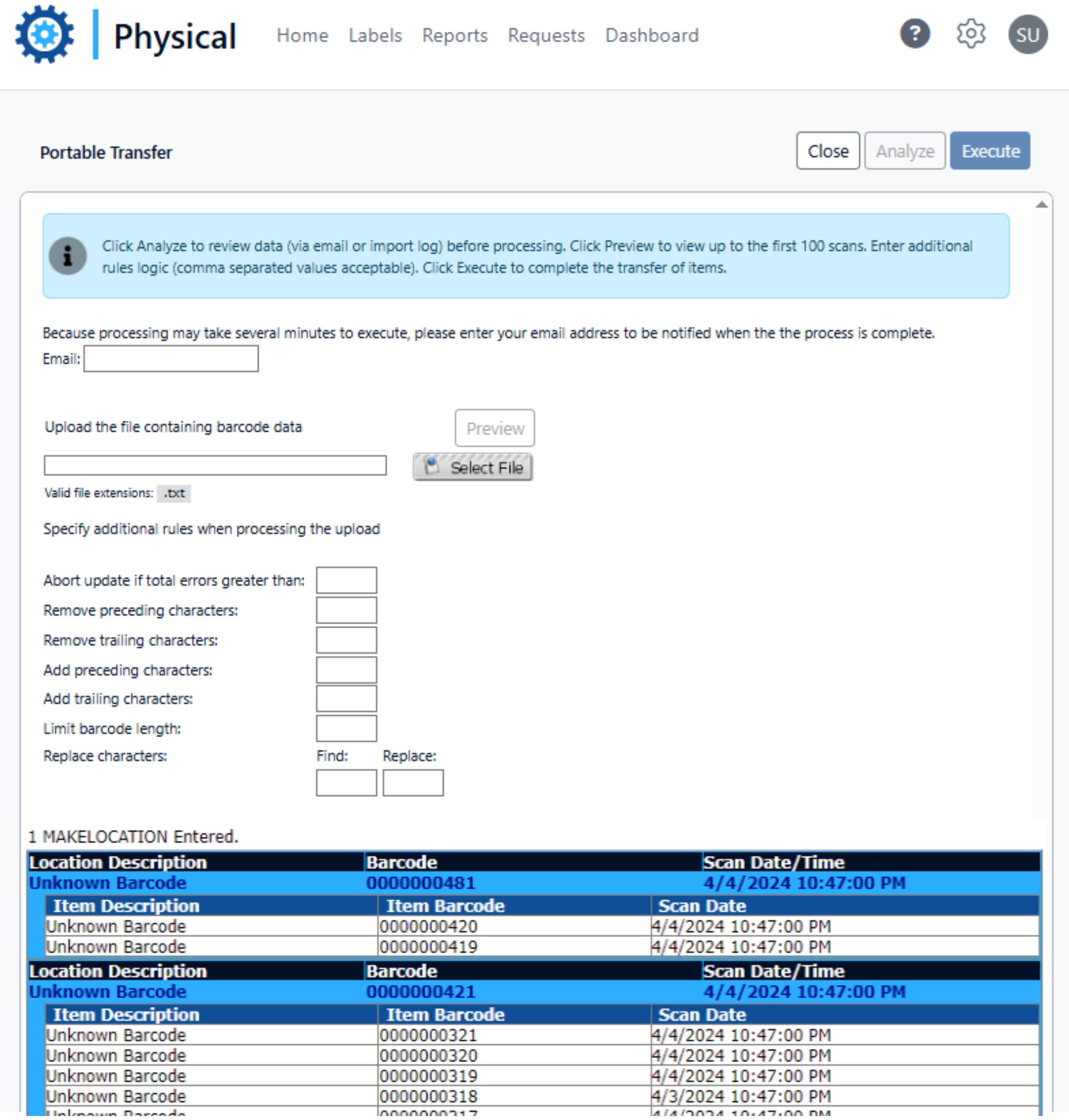
Configuring Portable File Transfer in Gimmal Physical

The options shown below reflect version 3.15 and above. For information on the configuration in previous versions, please contact support.

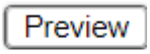
The Portable Transfer page is found in Admin | Utility | Portable Transfer. It contains options that allow users with the appropriate permissions to:

- Establish Rules for Barcode Processing
- Preview and Analyze files before importing them
- Execute the upload of a transferred file

If are having problems with viewing the file, please see the Troubleshooting section at the bottom of this page.



The following options will help you complete your transfer:

Name	Description
Email:	Optional Email Address which will receive the report of the completed process or analysis once the job has been completed. Larger files can take a significant time to complete processing, so we recommend using this option to notify you when the transfer is complete.
	Choose the file to be processed. The box will turn green if the file is accessible, but red if there is a problem. The transfer file must be in **.txt** format.
	This option does not process the file but shows the first 100 lines on this page with a summary of the contents.
Additional Rules	These rules will be applied to the barcode values as listed in the file before processing into Gimmal Physical. They help handle certain types of legacy or 'dirty' data that may be present in the files.
Abort update if total errors are greater than:	Numeric value indicating the number of errors after which the process will be aborted. A large number of errors can indicate data or file issues and the best option would be to stop the processing of the file.
Remove preceding characters:	Enter the characters that should be removed from the beginning of the barcode line before it is ingested into Gimmal Physical. Leave blank if no characters should be removed.
Remove trailing characters:	Enter the characters that should be removed from the end of the barcode line before it is ingested into Gimmal Physical. Leave blank if no characters should be removed.

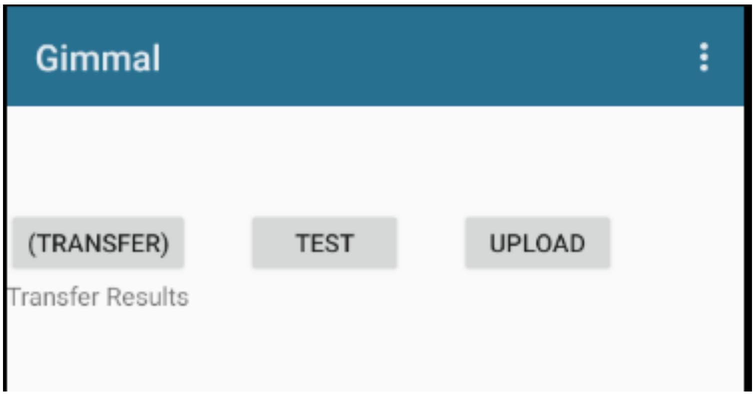
Name	Description
Add preceding characters:	Enter the characters that should be added to the beginning of the barcode line before it is ingested into Gimmal Physical. Leave blank if no characters should be added.
Add trailing characters	Enter the characters that should be added to the end of the barcode line before it is ingested into Gimmal Physical. Leave blank if no characters should be added.
Limit barcode length:	Truncate the barcode line to the entered value before it is ingested into Gimmal Physical. Characters will be removed from the end. Leave blank if the barcode should not be truncated.
Replace characters:	This option allows you to locate certain characters within the barcode as scanned into the file and replace them with others for processing within Gimmal Physical. If both are left blank, no characters will be replaced
Find:	Characters to locate and replace
Replace:	Characters to replace those found above in the 'Find' text box. If this field is left blank, but there are characters (including spaces) in the 'Find' text box, if they are found in the barcode, they will be deleted.
Analyze	Clicking this button will run the selected file through the rules as a fully featured test. An email will be generated with the results of the analysis, and there will be an entry in the logs table, but no items will be processed.
Execute	Runs the full process to upload and update the barcodes noted on the file. We recommend running the analysis first to ensure there are no outstanding issues before executing the transfer process.
Close	Exits the Portable Transfer screen and stores the values entered.

If the 'Execute' or 'Analyze' options are used, the log file will be available from the Admin | Import Log list.

1.4.2.6.2.6 Data Update with Web Services

When using Webservices there's no need to generate a file. The scans can be uploaded directly from the device.

1. Go to the Synchronize tab.
2. Ensure the upload type is set to '(TRANSFER)'.
3. Tap the 'UPLOAD' button.
4. The results of the upload will be listed below.

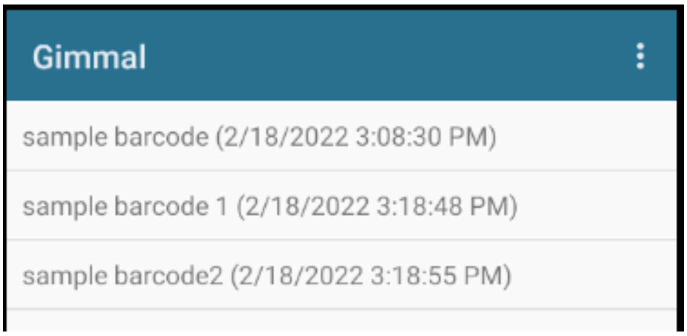


1.4.2.6.2.7 View Scanned Data

All scans are saved to a log on the device.

To view the logged scans:

1. Select History from the menu.
2. The barcode and scan date will be listed in order of scan.



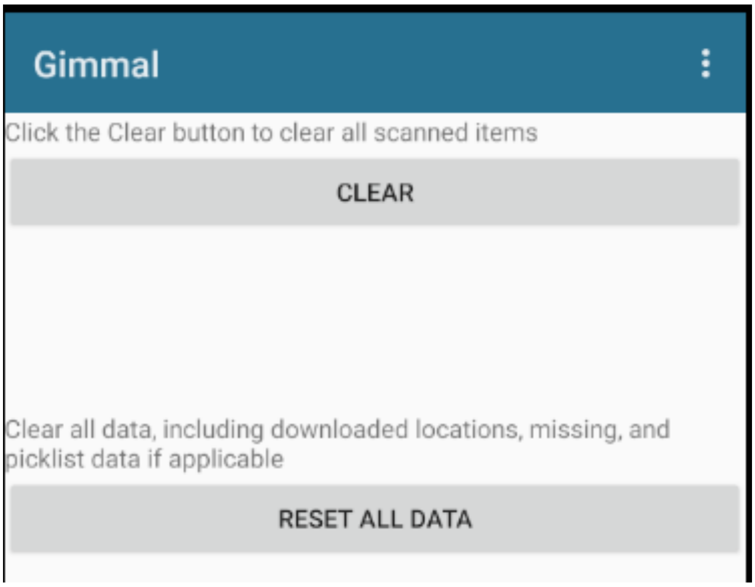
1.4.2.6.2.8 Clear Scanned Data

Once transfers are successfully uploaded, clear the scanned data log:

1. Select Clear from the menu.
2. Tap the 'CLEAR' button.

If there is other data saved to the device from using Webservices, you can clear from this option as well.

1. Select Clear from the menu.
2. Tap 'RESET ALL DATA'.



1.4.2.6.2.9 Reconcile

A reconcile compares scanned data for a given location to what Gimmal Physical expects in that location, then updates Gimmal Physical to be in sync with the scanned data.

1. Scan a location barcode.
2. Scan the barcodes for all items in the location.
3. Upload the scanned data.
    a. Without webservices:
        i. Create a text file as detailed in the Data Upload section.
        ii. Copy the file to your workstation.
        iii. Upload the file through the Gimmal Physical website.
    b. With webservices:
        i. Go to the Synchronize tab.
        ii. Ensure the upload type is set to '(Reconcile)'.
        iii. Tap the 'UPLOAD' button.
        iv. The results of the reconciliation will be listed below.

A reconcile has three possible results:

1. The scanned item is in the expected location.

   a. No action is taken.
2. Gimmal Physical found a scanned item that was not expected in that location.
   a. Gimmal Physical will transfer the item to the scanned location.
3. Gimmal Physical expected an item, but it was not found in the scanned data.
   a. Gimmal Physical will mark the item as missing.

1.4.2.6.2.10 Web Service-Specific Features

To use these features Webservices must be configured as detailed under PortableConnect with Webservices in this document.

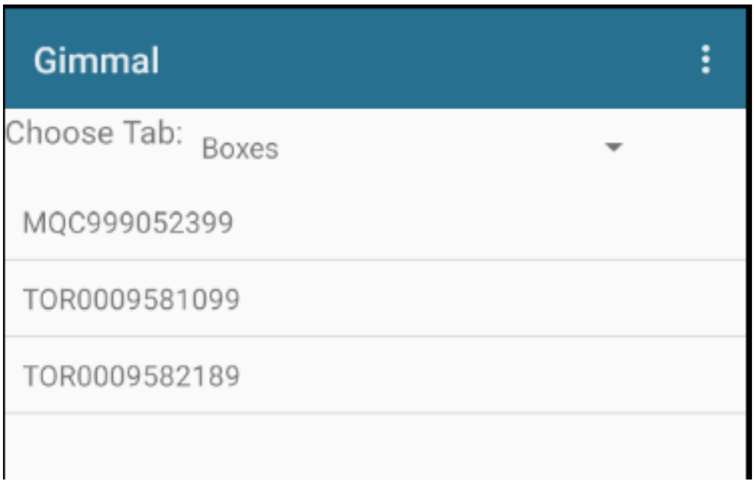
Missing Records

To view a list of missing records in Gimmal Physical via PortableConnect:

1. Select the Missing tab.
2. Select the item tab to view missing items.
3. The items will populate below (see right).

If using RFID with PortableConnect, a 'DETECT' button will appear upon tapping on the item.

Tapping the 'DETECT' button will change the tab to the Detector tab and preload the item barcode. See PortableConnect with RFID for more information.

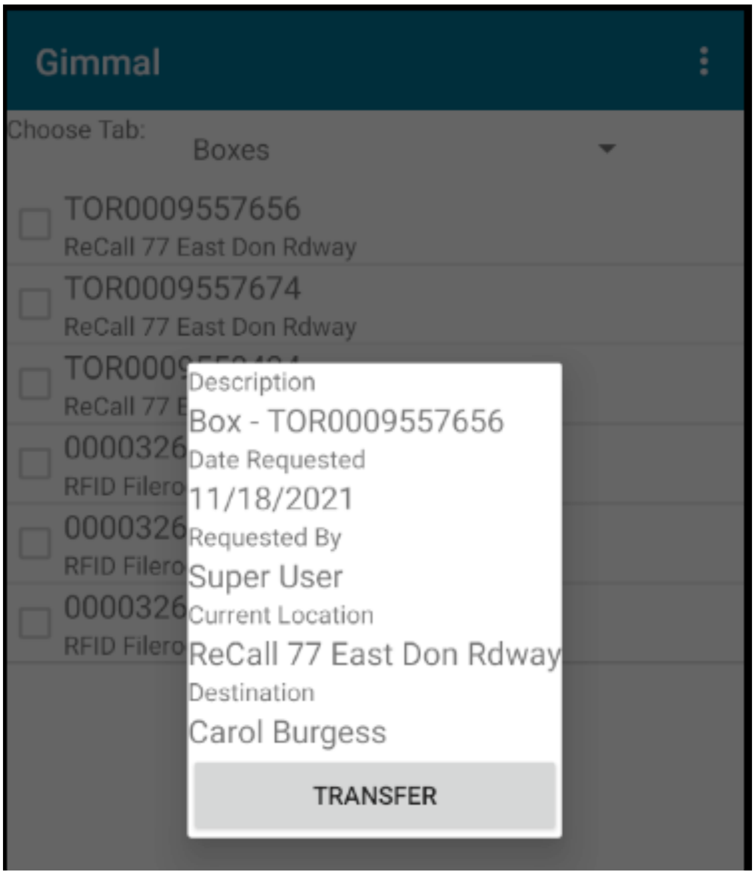


Picklist

PortableConnect with Webservices can be used to fulfill valid requests in Gimmal Physical.

1. Navigate to the Picklist tab.
2. Select the item tab to view valid requests.
3. Tap on the request to mark it as fulfilled.
4. Tap the 'TRANSFER' button.

This will add the appropriate barcodes to the log and mark the request as complete on the device. To complete the request and update Gimmal Physical an upload must be performed.

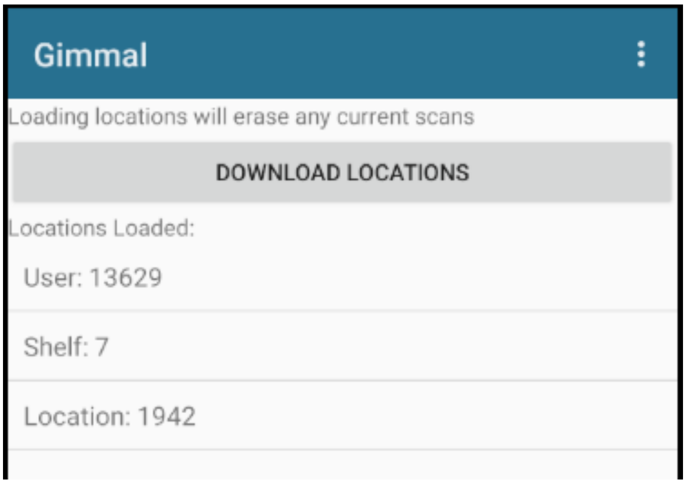


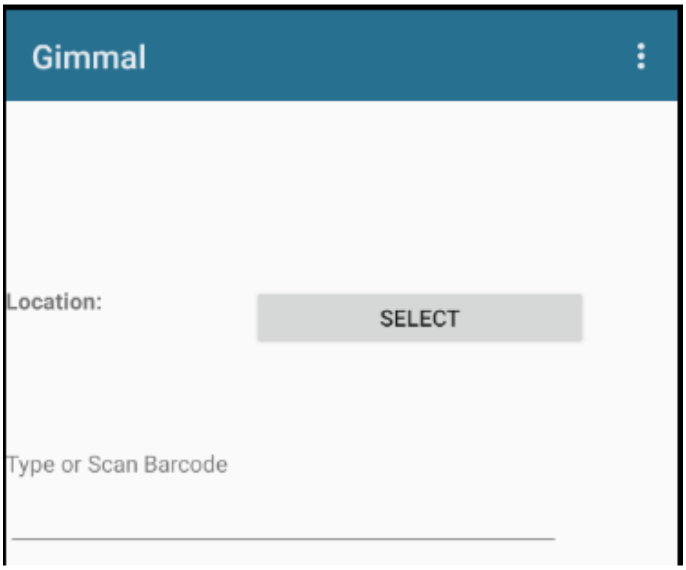
If using RFID with PortableConnect: a 'DETECT' button will appear on the request. Tapping the 'DETECT' button will change the tab to the Detector tab and preload the item barcode. See PortableConnect with RFID.

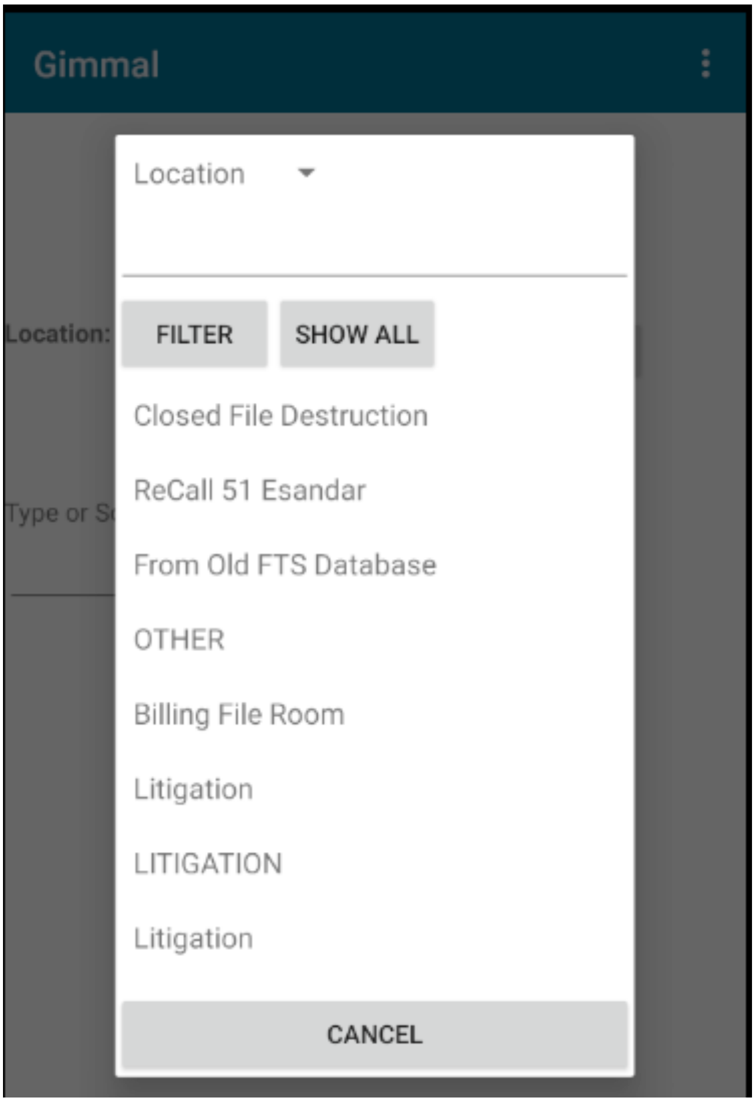
Load Locations

When using Webservices, PortableConnect can preload the list of possible locations from Gimmal Physical.

1. Go to the Preferences tab.
2. Enable 'Load Locations'
3. Tap 'SAVE'.
4. Go to the Locations tab.
5. Tap 'DOWNLOAD LOCATIONS'; Wait for the download to complete.
6. Navigate to the Collection tab.
7. Tap the 'SELECT' button adjacent to the 'Locations:' label.
8. Select the location's item tab.
9. Tap a location from the list to prepopulate the location.


Gimmal
Loading locations will erase any current scans
DOWNLOAD LOCATIONS
Locations Loaded:
User: 13629
Shelf: 7
Location: 1942


Gimmal
Location:
SELECT
Type or Scan Barcode



1.4.2.6.2.11 RFID Specific Features

Detector: PortableConnect with RFID can be used to locate missing items.

1. Navigate to the Detector Tab.
2. Enter the barcode of the item to locate it.
3. Tap 'READY TO SCAN'.

The device will beep if you are within range of the item and increase beeping the closer the device becomes.

1.4.2.6.2.12 TC5x Device Preparation Checklist

Parts required

- TC5x Scanner
- Docking Station

- USB cable
- Power cable (three parts)

Initialization Steps

1. Assemble the power cable:
    a. Connect the three power cable pieces.
    b. Plug the power cable into the dock.
    c. Plug the power cable into a wall outlet.
2. Connect the USB cable to the dock and a PC.
3. Install a battery into the back of the scanner.
4. Dock the scanner and allow it to charge.
   Note: Full battery is ideal, but not required.
5. Once the scanner powers on, go to Settings and update the Date and Time.
   Note: *Automatic* should be disabled while setting the date and time, and then re-enabled once it is accurate.
6. Swipe down from the top of the scanner (while it is still docked) and change the USB connection type to *Transfer Files*. If you do not see this option, please see Troubleshooting Note below.
7. Copy the latest version of the APK that was delivered with these instructions. Paste it directly into the Internal shared storage drive of the scanner.
8. Install the APK:
    a. Take the scanner out of the dock.
    b. Unlock the scanner.
    c. Navigate to the Home Screen, and swipe up from the bottom to get to the App Drawer.
    d. Locate the File Browser app and browse to the top directory of Internal shared storage.
    e. Double-click on the Gimmal.GimalPortableConnect.apk and follow the installation steps.
    f. Select Open as the last step.
9. Select the square in the bottom-right corner and then use the Clear All button to reset the Gimmal Portable Connect app.
10. To locate the Gimmal Portable Connect app, navigate to the Home Screen and swipe up from the bottom. Note: For easier access, tap and hold and then drag the app icon onto the Home Screen
11. We recommend adding the Settings to the Home Page of the scanner for easier troubleshooting.

1.4.2.6.2.13 Troubleshooting

Changing Default USB Connection to enable File Transfer

Whenever the TC5x is docked, the USB connection type defaults to ***USB Charging***. Because of this, the Internal Shared Storage is NOT available for browsing. To access the shared drive to drop the APK file or capture the TransferData file, the user must first change the USB connection type. The methodology differs based on the version of Android.

Newer Versions of Android

To enable file transfer on more recent versions of Android:

1. Dock the scanner
2. Swipe down from the top of the screen to open the Notification Pane,
3. Choose the ribbon for USB Charging
4. Change the selection to File Transfer.

Older Versions of Android

To enable file transfer on older versions of Android:

1. Navigate to the device Settings, then locate About Phone.
2. Quickly tap on the Build Number at least times to enable Developer Options.
3. Return to the main Settings list.
4. Choose System.
5. Select Developer Options.
6. Scroll down to locate the Default USB Connection,
7. Choose File Transfer.

If neither option works for your version of Android, please contact Gimmal Support at support@gimmal.com[29] with the model of the scanner and the version of Android in use.

1.4.2.6.3 RFIDConnect User Guide

Please note: This article is provided for existing installations only. Gimmal Physical no longer supports RFID for new customers.

1.4.2.6.3.1 Installation Settings

Gimmal Physical RFIDConnect is a Windows system tray application that allows users to interact with RFID-tagged items to perform check-in/check-out operations.

Setting Up Gimmal Physical RFIDConnect

To get started with RFIDConnect, you need:

1. RFID Reader Hostname/IP Address
2. Gimmal Physical WebServices URL

Initial Set Up

Set the WebService URL:

29. mailto:support@gimmal.com

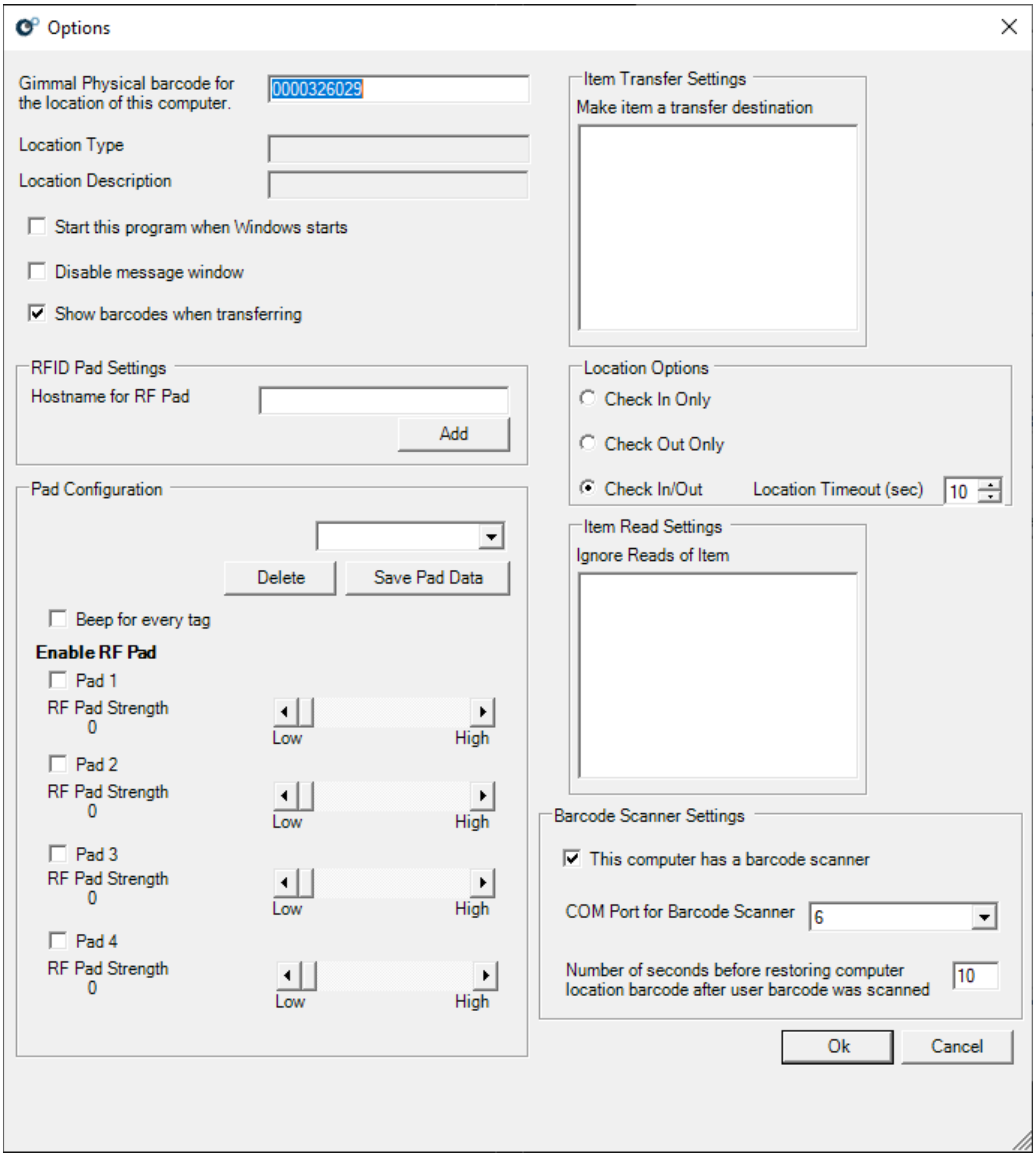
1. Navigate to the RFIDConnect installation directory.
2. Open Gimmal PhysicalRFIDConnect.exe.config in a text editor.
3. Find the setting tag where the name attribute equals “WebserviceURL”. EX:
   <setting name="WebserviceURL" serializeAs="String">

   <value></value>

   </setting>
4. Set the Value tag to the Gimmal Physical WebService URL.
5. Save the file.

Set and configure the RFID Reader and Antenna:

1. Start the application.
2. Right click on the RFIDConnect Icon in the system tray.
3. Click on Options
4. Enter the Hostname/IP Address in the ‘Hostname for RF Pad‘ text box in the RFID Pad Settings section.
5. Click Add.
6. Select the RFID Pad from the dropdown menu in the Pad Configuration section.
7. Check the appropriate boxes for each antenna attached to the reader and set the desired strength.
8. Click Ok



Configure Check-In/Out Operations:

RFIDConnect supports three Check In/Out modes.

Check-In Only

Check-in items by passing the tagged items over the antenna. The tagged item will be checked into the barcode to which the reader is set.

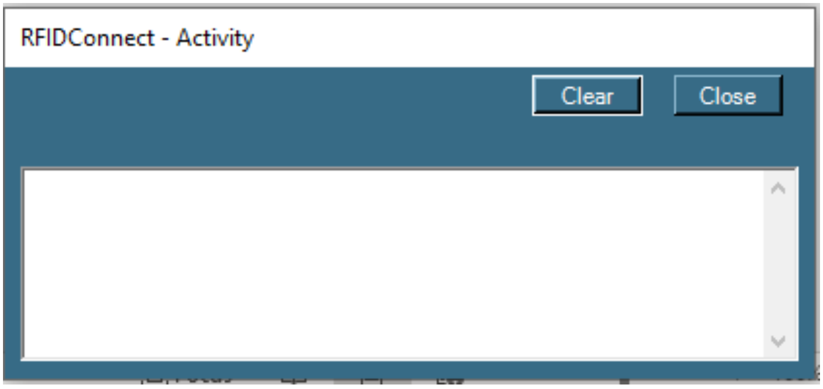
Check-Out Only

First, check out items by passing the tag for the check-out destination. Then pass the tagged item over the antenna.

Check-In/Out

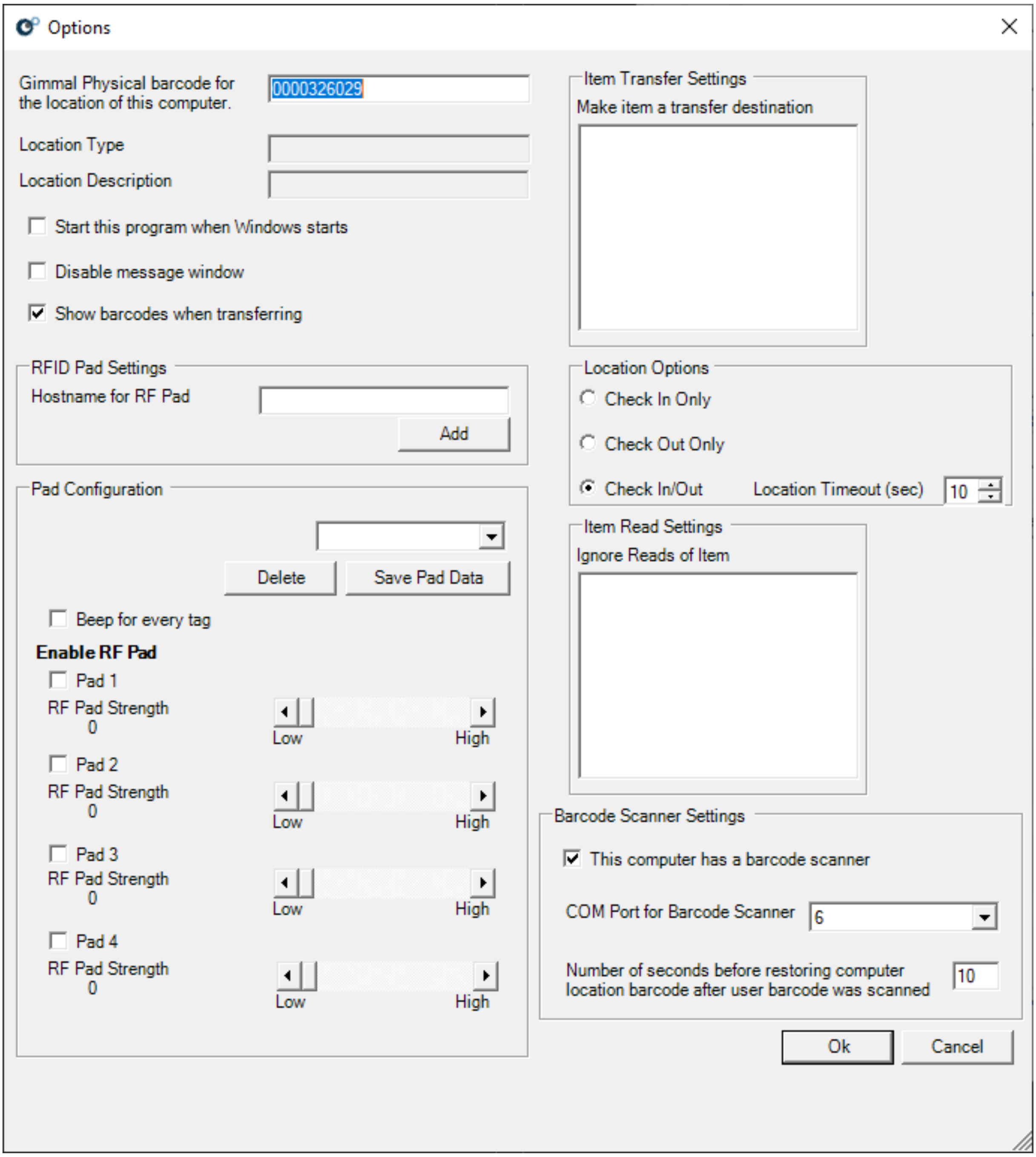
- This mode supports both check-in and check-out, with a timeout setting for the transfer destination read.
- Example: The reader detects a transfer destination, and for the next 10 seconds any items it reads will be checked out to that destination. After 10 seconds it reverts to check-in mode.

When detected, read tags will be shown in the Show Activity window. This window will open automatically unless disabled in the Options menu.



Using RFIDConnect for check-in/out requires users to define the following settings:

1. Set the Location that the RFID Reader represents: (Ex. File room, Warehouse)
    a. Start the RFIDConnect application.
    b. Right click on the RFIDConnect Icon in the system tray, and click on Options.
    c. Enter the Gimmal Physical barcode for the item that the reader represents in the 'Gimmal Physical barcode for the location of this computer' textbox.
    d. Click Ok.
2. Set which Tabs that the Reader will recognize as transfer destinations:
    a. Start the RFIDConnect application.
    b. Right click on the RFIDConnect Icon in the system tray, click on Options
    c. Under Item Transfer Settings check the boxes for the tabs that should be recognized as a transfer destination.
    d. Click Ok.
3. Set which Tabs to ignore reads:
    a. Start the RFIDConnect application.
    b. Right click on the RFIDConnect Icon in the system tray, click on Options
    c. Under Ignore Reads of Item, check the boxes for the tabs that should be ignored if read.
    d. Click Ok.



1.4.2.6.3.2 Additional Options

Barcode Scanner - If using RFIDConnect at a workstation that also has a Tethered Scanner, you can use the Tethered Scanner to read destination barcodes.

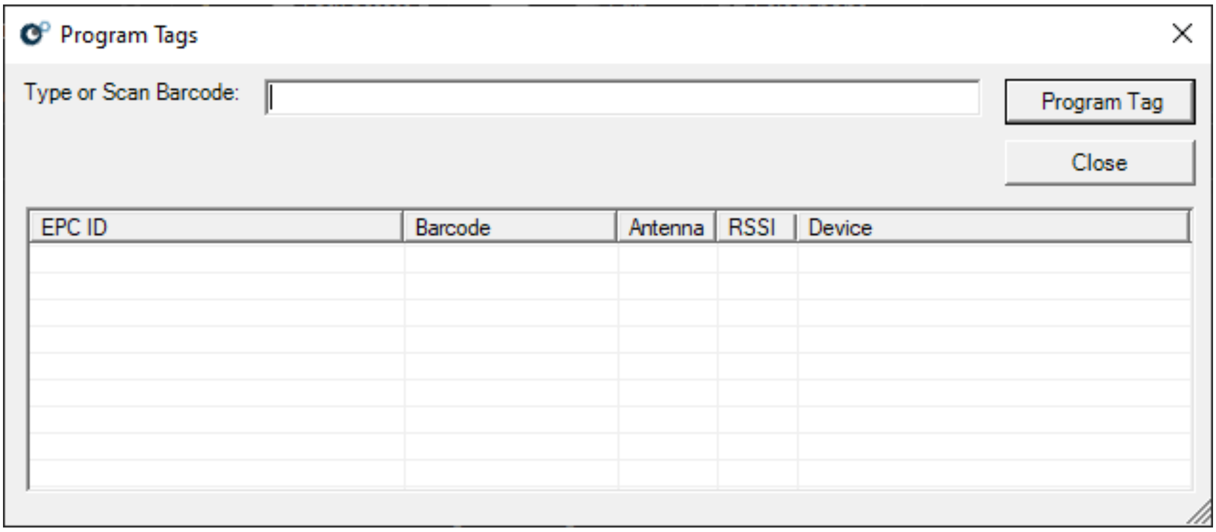
1. Start the RFIDConnect application.
2. Right click on the RFIDConnect Icon in the system tray, and click on Options.
3. Check the ‘This computer has a barcode scanner’ checkbox.

4. Select the COM port that the tethered scanner is using from the ‘COM Port for Barcode Scanner’ drop-down.
5. Click Ok

1.4.2.6.3.3 Programing Tags

RFIDConnect can also reprogram RFID tags:

1. Start the RFIDConnect application.
2. Right click on the RFIDConnect Icon in the system tray.
3. Click on Program Tags.
4. Scan the tag to reprogram.
5. Type in the new barcode.
6. Click Program Tag.



1.4.2.6.3.4 Supported Hardware

RFIDConnect supports the Zebra FX7500 RFID Reader.

Physical Characteristics

Dimensions	7.7 in. L x 5.9 in. W x 1.7 in. D (19.56 cm L x 14.99 cm W x 4.32 cm D)
Weight	1.9 lbs ± 0.1 lbs (0.86 kg ± 0.05 kg)
Housing Material	Die-cast aluminum, sheet metal, and plastic
Visual Status Indicators	Multicolor LEDs: Power, Activity, Status and Applications
Mounting	Keyhole and standard VESA (75mm x 75mm)
Environmental	
Operating Temp.	-4° to +131° F/-20° to +55° C
Storage Temp.	-40° to +158° F/-40° to +70° C
Humidity	5-95% non-condensing
Shock/Vibration	MIL- STD-810G
Regulatory Compliance	
Safety	UL 60950-01, UL 2043, IEC 60950-1, EN 60950-1
RF/EMI/EMC	FCC Part 15, RSS 210, EN 302 208, ICES-003 Class B, EN 301 489-1/3
SAR/MPE	FCC 47CFR2:OET Bulletin 65; EN 50364
Other	ROHS, WEEE
Connectivity	
Communications	10/100 BaseT Ethernet (RJ45) w/ POE support; USB Client (USB Type B), USB Host Port (Type A)
General Purpose I/O	2 inputs, 3 outputs, optically isolated (Terminal Block)

Power Supply	POE, POE+ or +24V DC (UL Approved) 12V-48VDC operation can be supported
Antenna Ports	FX 7500-2: 2 mono-static ports (Reverse Polarity TNC) FX 7500-4: 4 mono-static ports (Reverse Polarity TNC)
Hardware, OS, and Firmware Management	
Processor	Texas Instruments AM3505 (600 Mhz)
Memory	Flash 512 MB; DRAM 256 MB
Operating System	Linux
Firmware Upgrade	Web-based and remote firmware upgrade capabilities
Management Protocols	RM 1.0.1 (with XML over HTTP/HTTPS and SNMP binding); RDMP
Network Services	DHCP, HTTPS, FTPS, SFPT, SSH, HTTP, FTP, SNMP and NTP
Network Stack	IPv4 and IPv6
Security	Transport Layer Security Ver 1.2, FIPS-140
Air Protocols	EPCglobal UHF Class 1 Gen2, ISO 18000-6C
Frequency (UHF Band)	Global Reader: 902 MHz – 928 MHz (Maximum, supports countries that use a part of this band), 865 MHz – 868 MHz US (only) Reader: 902 MHz – 928 MHz
Transmit Power Output	10 dBm to +31.5 dBm (POE+, 12V ~ 48V External DC, Universal 24V DC Power Supply); +10 dBm to +30.0 dBm (POE)
Max. Receive Sensitivity	-82 dBm
IP Addressing	Static and Dynamic

Host Interface Protocol	LLRP
API Support	Host Applications – .NET, C, and Java EMDK; Embedded Applications – C & Java SDK
Warranty	The FX7500-2 and FX7500-4 are warrantied against defects in workmanship and materials for one year (12 months) from the date of shipment, provided the product remains unmodified and is operated under normal and proper conditions.

1.4.2.6.4 ScannerConnect User Guide

1.4.2.6.4.1 Contents

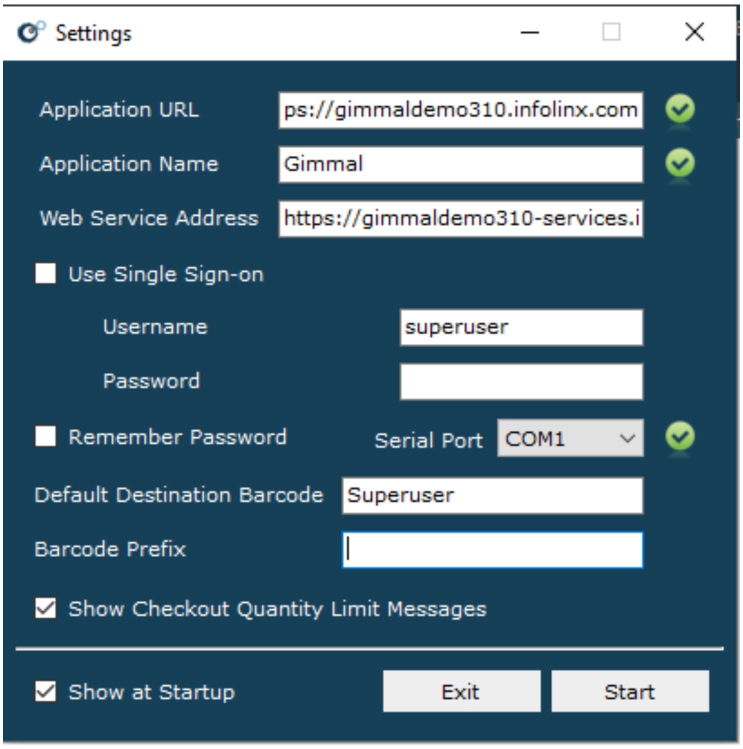
1.4.2.6.4.2 Settings

Installation Settings

ScannerConnect allows users to transfer records in the Gimmal Physical application with a tethered scanner device.

To configure ScannerConnect, enter the Settings options to match your organization's configuration .

The data entered in the screenshot below is SAMPLE DATA for example purposes only. Please enter the values specific to your organization.



***Green* check mark:** *Settings are valid*

Required Settings

- **Application URL -** the base URL for the Gimmal Physical web application (e.g. https://gimmal.example.com).
- **Application Name -** The name of the application as found under *Admin | Technical Information* in the Gimmal Physical Application.
- **Web Service Address -** the URL for the Gimmal Physical web service. The format will differ if your Gimmal Physical is on-premises or in the Cloud
  - Cloud example: https://client-services.gimmal.com[30]. Please contact Gimmal to verify the correct Web Service Address.
  - On-Premises: This should be the URL to their Physical Records REST API site. example: https://sitename-services.example.com
- **Web Service Credentials –**
  - **SSO -** A browser window will open when the user checks the User Single Sign-on checkbox, and the user will need to be authenticated against their SSO provider.
    - **Important Note**

      Only Service Provider (SP) initiated SAML2 workflow is supported. Identity Provider (IdP) initiated workflow is not supported.

30. https://client-services.gimmal.com/

- **Basic –** Username and password must be entered**.**
- **If the credentials are invalid,** or ScannerConnect cannot connect to the web a red icon will appear next to the Web Service Address textbox.
    - Hover over this icon to view additional details on this issue.

Serial Port – this is the COM port through which the program receives input from the tethered scanner (e.g. COM 1). If the scanner is connected to the user's computer, they can open Device Manager and expand the node entitled Ports (COM & LPT) to see which serial port needs to be selected in ScannerConnect.

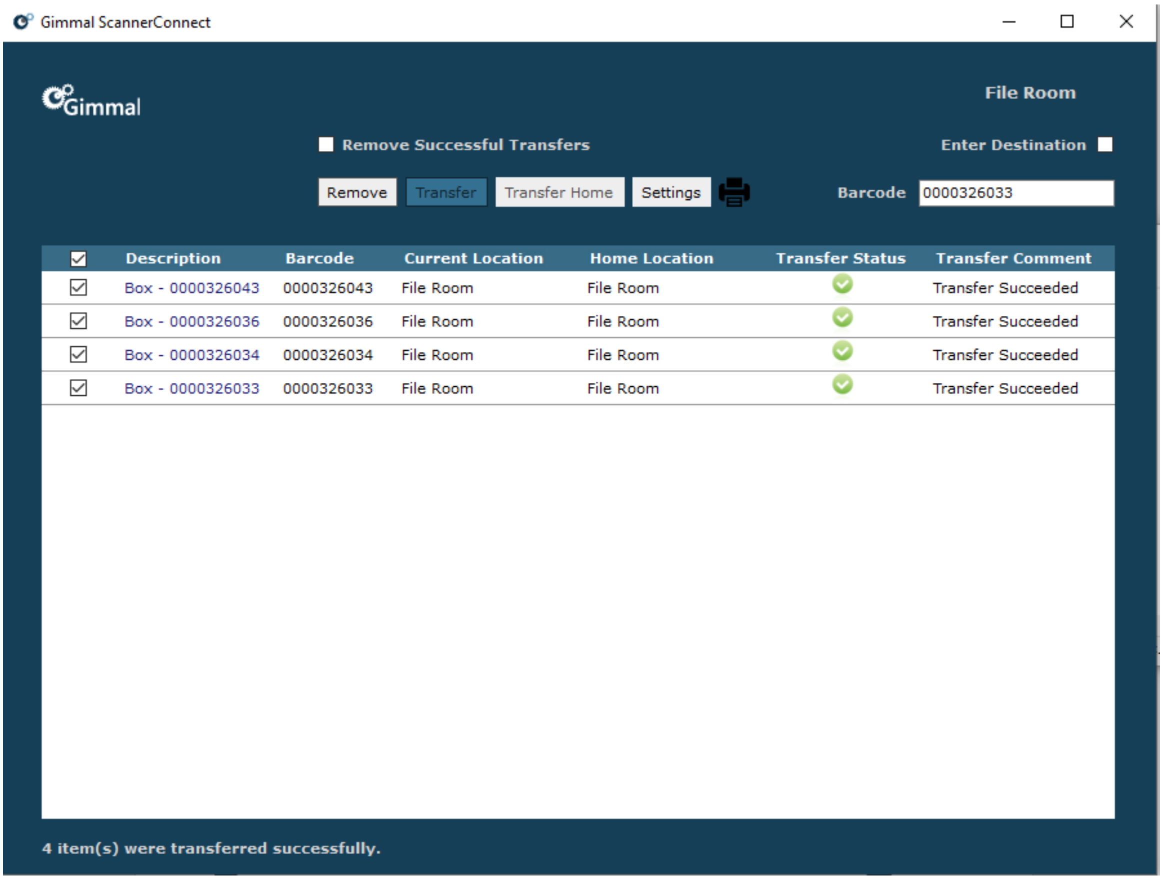
Optional Settings

- **Remember Password -** determines whether ScannerConnect stores the user's web service credentials when using basic authentication.
- **Default Destination Barcode -** the barcode of the destination to which items will be transferred if no other destination is provided. Without a default, a destination must be scanned for every transfer.
- **Barcode Prefix –** text which will be prepended to all scanned barcodes.
- **Show Checkout Quantity Limit Messages –** determines whether ScannerConnect displays warnings when the number of items transferred to a user puts them over the allowed limit. The limit is set as a preference in the web application.
- **Show at Startup –** determines whether the Settings menu will be displayed every time the application starts.

To exit without saving changes, click 'Cancel'. To save changes, click 'OK'. The Settings menu can be accessed at any time by clicking 'Settings'.

1.4.2.6.4.3 Using ScannerConnect

ScannerConnect allows you to perform transfers either by selecting the items and clicking 'Transfer', scanning the Transfer action barcode, or pressing 'Enter' from your keyboard.



1.4.2.6.4.4 Transfer

The destination may be scanned at any time; it does not need to be scanned before or after the items to be transferred.

To Transfer Items

1. Scan the barcodes of the items and the barcode of the transfer destination.
2. Click 'Transfer' or scan the Transfer action barcode to transfer the selected items.

Note:

- Scanning another destination will override the existing destination. If the item type of a scanned barcode cannot be transferred (e.g. Location, User), ScannerConnect will automatically recognize it as the destination.
- However, if the item type of a scanned barcode can be transferred (e.g. Box), then check the 'Enter Destination' checkbox or scan the Make Location barcode to select the next received scan as the destination.
- Item barcodes and destination barcodes may also be entered manually in the Barcode textbox.

Home Transfer

To Transfer the selected items back to Home Location:

1. Scan the barcodes of one or more items (a destination does not need to be scanned).
2. Click 'Transfer Home' or scan the Home Transfer action barcode to return the selected items to their respective home locations. Item barcodes may also be entered manually in the Barcode textbox.

Remove

One or more scanned items may be removed from the grid at any time.

1. Select the items you would like to remove in the grid and click 'Remove' or scan the Close action barcode.
2. ScannerConnect can also be configured to automatically remove items from the grid when they are successfully transferred. This is done by checking the Remove Successful Transfers checkbox.

Print

The items in the grid and the transfer results displayed in the grid may be printed at any time by clicking the printer icon next to the Settings button.

Other

- Clicking on the Gimmal Physical logo in the top left corner of the application window will open a web browser and navigate to the Application URL specified on the Settings menu.
- Scanned items displayed in the grid will include hyperlinks to the view page of each item in the Gimmal Physical web application.

1.4.2.6.4.5 Keyboard Shortcuts

- **Enter**: If focus is on the Barcode textbox, ScannerConnect will try to find the item in Gimmal Physical. This is equivalent to scanning the item. If focus is not on the Barcode textbox, pressing the Enter key will transfer the selected items. This is equivalent to clicking the Transfer button or scanning the Transfer action barcode**.**
- **Ctl + R:** Remove selected items from the grid. This is equivalent to clicking the Remove button or scanning the Close action barcode.
- **Ctl + H:** Transfer selected items to their respective homes. This is equivalent to clicking the Transfer Home button or scanning the Home Transfer action barcode.
- **Ctl + S:** Open the Settings menu. This is equivalent to clicking the Settings button.
- **Ctl + M:** Toggle the setting Remove Successful Transfers. This is equivalent to clicking the checkbox of the same name.
- **Ctl + D:** Toggle the Enter Destination switch. This is equivalent to clicking the checkbox of the same name or scanning the Make Location action barcode.
- **Ctl + B:** Set focus on the Barcode textbox (to begin typing a barcode without using the mouse).
- **Ctl + L:** Selects or deselects all items in the grid. This is equivalent to clicking the checkbox in the top left corner of the grid.

1.4.2.6.5 User Guide for Gimmal Records Connector

Electronic and physical records can now use a single file plan with the Gimmal Records Connector. Changes in Gimmal Records will automatically populate record schedules in Gimmal Physical.

1.4.2.6.5.1 Details

- *Record Schedules* in Physical synced with any changes in Records Lifecycles
  - All required fields mapped as Read-Only in Physical
  - Approved users can still make and use records schedules in Physical
- Manual update with status & ‘Run Now’ options

1.4.2.6.5.2 Limitations

- •Actions supported: **Dispose and Delete**, **Permanent**
- •Date based retention Only
- •Single phase only

1.4.2.6.5.3 Configuration

Navigate to Admin | Application Settings to configure the values for the Gimmal Records Connector.

Gimmal Records Username	Phys-conn@gimmal.com
Gimmal Records Password	•••••••••••••
Gimmal Records URL	https://dev.recordlion.net/
Update Schedules from Gimmal Records	Run Now
Gimmal Records Schedule Sync Status	Failed on 4/25/2023 1:41:54 PM

- *Gimmal Records Username* - Service account with access to Gimmal Records
- *Gimmal Records Password* - Password for the Service Account that has access to Gimmal Records
- *Gimmal Records URL* - URL of the instance of Gimmal Records for this client
- *Update Schedules from Gimmal Records - **Run Now*** - button used to start a synchronization and update. Clicking this button will:
  - Add new record schedules from Gimmal Records to Gimmal Physical which match the criteria
  - Update existing Record Schedules in Gimmal Physical with changes made in Gimmal Records.
  - Mark records schedules as obsolete if they have been deleted from Gimmal Records and have boxes associated with them in Gimmal Physical.
- *Gimmal Records Schedule Sync Status* - The status of the last run of the Gimmal Records Connector.

1.4.2.6.6 Iron Mountain Integration Guide

1.4.2.6.6.1 Overview

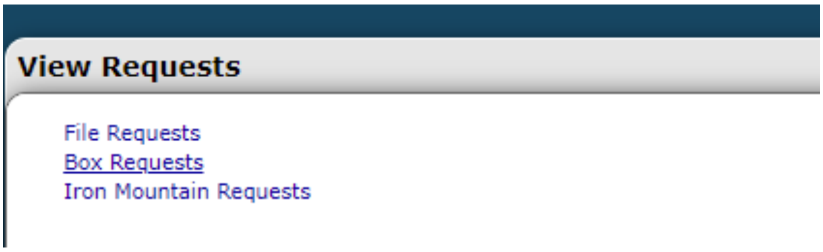
The document covers the Gimmal Physical Iron Mountain integration.

- Iron Mountain integration can only be linked to Boxes and/or Files to process order files (.ord).
- Open shelving orders are not supported.
- When requests are sent to Iron Mountain, you have a choice of whether items are automatically transferred in Gimmal Physical to the destination of the request.
- The integration does not support maintenance files (.mnt) to update metadata for Iron Mountain unique box numbers (SKP).
- The integration does not consume the nightly files Iron Mountain posts on the FTP site (aka SFTP) every 24 hours which indicates the request status.

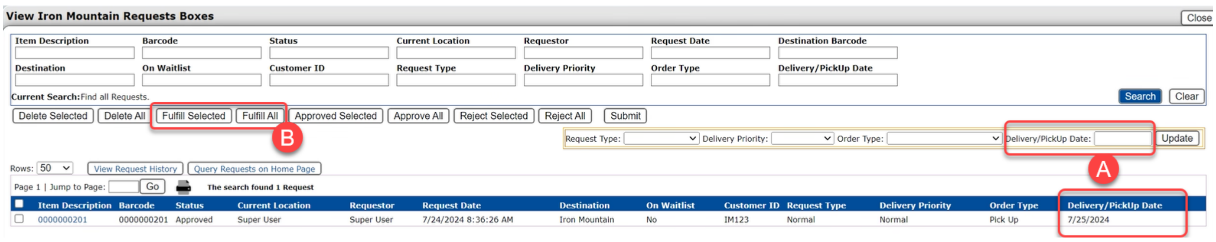
1.4.2.6.6.2 Features

Manage and Review Iron Mountain Requests

There is an Iron Mountain Requests page to manage requests for items going to or coming from Iron Mountain. Click the ‘Iron Mountain Requests’ link to open the View Iron Mountain Requests page.



The View Iron Mountain Request page enables the submission of requests to the FTP site that Iron Mountain monitors.



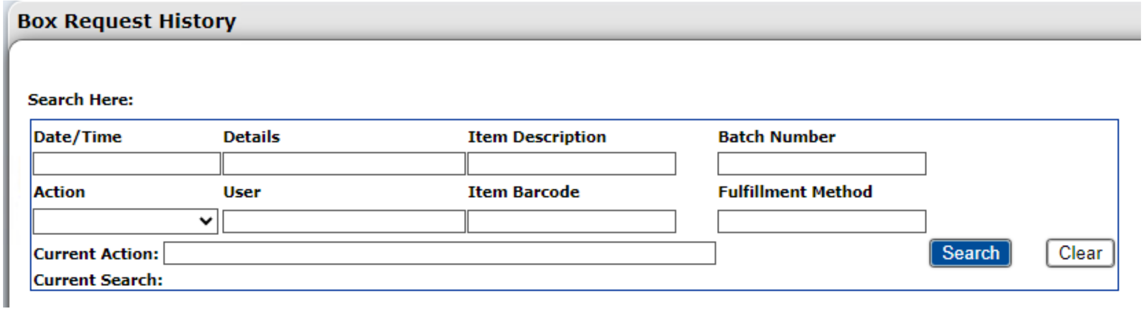
The top portion of the screen can be used to query requests with the ‘Current Search’ showing the applicable query in effect.

Actions are taken using the drop-down fields and buttons. Users with the appropriate permissions can override certain values on the View Iron Mountain Requests page by:

1. Selecting the request(s) to be changed from the list of requests
2. Editing the required value in the yellow section text box
3. Clicking the ‘Update’ button.

There are several available page options:

- The number of rows shown on the page can be adjusted using the 'Rows' Dropdown. 50 is the maximum value
- View Request History will open the '[Item] Request History' page which allows users to locate the request history by querying a variety of options



- Query Requests on the Home Page Grid will collect all items from the current query and move them to the Home Page Grid. This view has additional values, actions, and queries available for the management of the items.

The buttons listed will apply as follows:

- Delete Selected - permanently removes the requests selected in the lists and request table
- Delete All - permanently removes all the listed requests and removes them from the request table
- Fulfill Selected - Transfers the selected items after they have been submitted.
- Fulfill All - Transfers all applicable items listed on all pages. Items must first be submitted.
- Approve Selected - Approve the transfer request for the selected items.
- Approve All - Approve the transfer request for all the items on all pages of the list.
- Reject Selected - Reject the transfer request for the selected items.
- Reject All - Reject the transfer request for all the items on all pages of the list.
- Submit: Submit the item to Iron Mountain for pickup or delivery.

Note:

- Items must be 'Approved' before they can be submitted
- Depending on the setting in the Iron Mountain Integration configuration screen, users have a choice to transfer the item within Gimmal Physical immediately after the 'Submit' button is clicked or wait until a further time to transfer the items within Gimmal Physical using the Fulfill buttons

The visibility of several controls on the request page is dependent on configuration options found on the Iron Mountain Integration page:

- (A) The Delivery/Pickup Date override and column only show if the ‘Scheduled’ date is the chosen default option for the default Delivery Priority.
- (B)The Fulfill Selected Fulfill All buttons only appear if the ‘Should items be automatically transferred when requests are submitted is set to 'No’ on the Iron Mountain Integration page (see below).

Helpful Tip

A selection for Off Site Vendor is not needed for new boxes as long as the requested destination is the Iron Mountain location. Having Iron Mountain as a choice of Off-Site Vendor for a box represents the fact that Iron Mountain has knowledge of and has registered the Box. New boxes don’t need this value from the Iron Mountain perspective ***until*** they are picked up for the first time. From within Gimmal Physical, the Off-Site Vendor selection will not be enabled until a new Box is first transferred to Iron Mountain. The workflow is intended to be the following:

1. The user creates a Box. At this point, the new Box will have the default *Current Location* of the User and the default *Home Location* of Iron Mountain.
2. The user requests pickup of the Box to be sent to Iron Mountain. Because the default *Home Location* is already Iron Mountain, no changes should be needed on the request page.
   Note: If the default home location was **not** set in the earlier step, ensure that the Iron Mountain location is specified as the new destination as part of the request.
3. Because the Box is being sent to Iron Mountain, it will appear in the Iron Mountain requests queue.
4. When the request is submitted from the Iron Mountain request queue page:
   a. It will be processed through the Iron Mountain integration.
   b. Gimmal Physical will transfer the Box to the Iron Mountain location within the application.
   c. This transfer step will assign the *Iron Mountain* to the Off-Site Vendor value at the Box level.
5. From this point forward, the Off-Site Vendor value will be set to Iron Mountain for that Box. Any subsequent requests for that box will go directly through the Iron Mountain queue.

Request Delivery (Retrieval) of Boxes and Files

The following options are available in the Gimmal Physical application.

- Request Type
  - Normal
  - Photocopy
  - Fax & Deliver
  - Fax & Refile
- Delivery Priority
  - Normal

    - Half Day
    - Rush
    - Scheduled
- Order Type
    - Standard Delivery
    - Pickup
    - Permanent Withdrawal

In older versions of Gimmal Physical (3.15 and below), the Order Type is stored as a numerical value ('enum'). When searching by order types in older versions, use the number associated with the Order Types, for example:

- 1 = Standard Delivery
- 2 = Pickup
- 3 = Permanent Withdrawal

Request Pickup of Boxes and Files

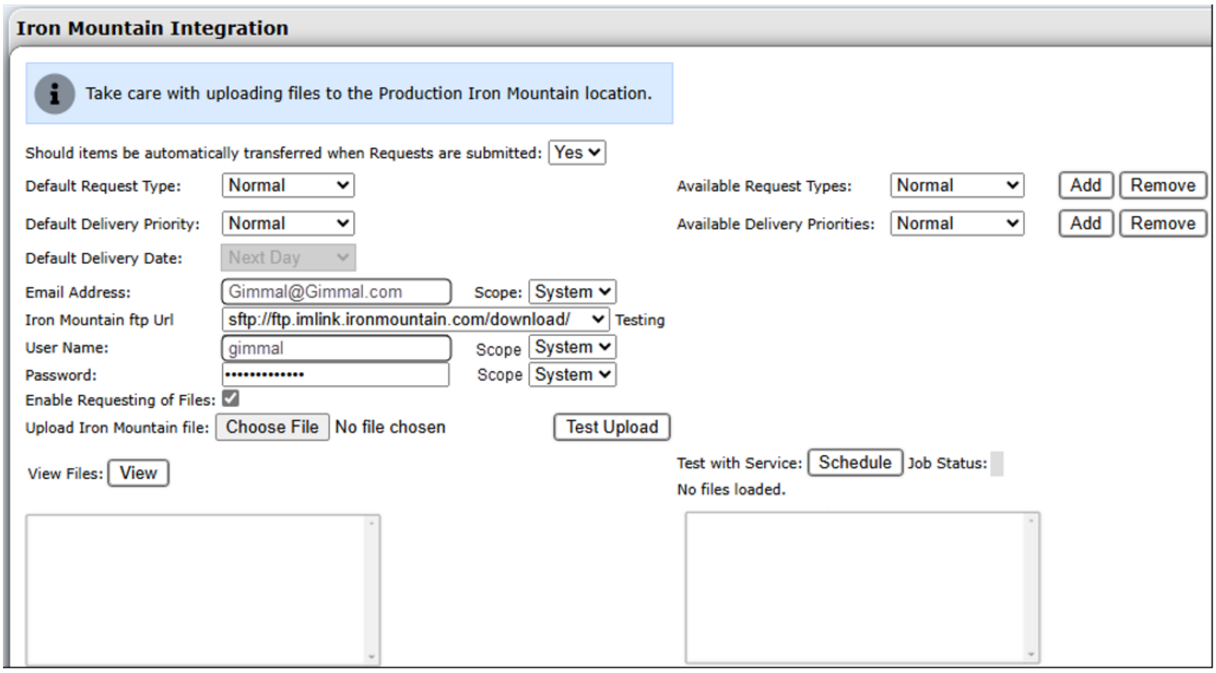
The following options are available in the Gimmal Physical application for delivery priority:

- Normal
- Half Day
- Rush
- Scheduled

1.4.2.6.6.3 Settings

For Gimmal Physical 3.15.1 and above.

The configuration settings for Iron Mountain can be found on the Iron Mountain integration page accessed via the Integration section on the Administration page reached by clicking the ‘Admin’ option on the navigation bar,



The options are as follows:

Name	Description

Should items be automatically…	This option allows for requests to automatically be transferred within Gimmal Physical once requests are submitted using the 'Submit' button.
	• Yes:
	    • Enables the Submit button to transfer any approved items in Gimmal Physical once clicked
	    • The Fulfill Selected and Fulfill All buttons are disabled
	• No:
	    • Users must manually transfer items using Fulfill Selected or Fulfill All to have them listed as transferred in Gimmal Physical
	Note: Found in 3.15.1 and above only

Default Request Type	This choice will populate the default options for all Request Type drop-down controls in the application. *Note: Found in 3.15.1 and above only*
Available Request Type	The drop-down list shows all available options for Iron Mountain Request Types. Administrators can add as many or as few options for their end users by highlighting an item and choosing 'Add' or 'Remove'. The choices will then populate the dropdown lists for all the Request Types in the application. *Note: Found in 3.15.1 and above only*

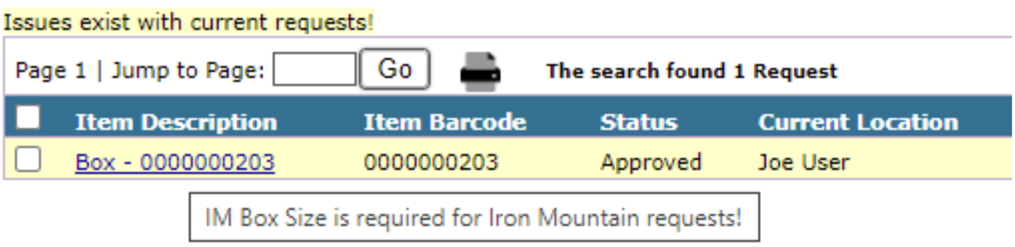
Name	Description
Default Delivery Priority	This choice will populate the default options for all Delivery Priority drop-down controls in the application. *Note: Found in 3.15.1 and above only* If Scheduled is chosen as the priority: • The **Default Delivery Date** field is enabled showing days of the week. This can then be used to calculate the scheduled delivery date. • The **Delivery/Pickup Date** override field and column are shown on the View Iron Mountain Request Page.
Available Delivery Priority	The drop-down list shows all available options for Iron Mountain Delivery Priorities. Administrators can add as many or as few options for their end users by highlighting an item in the list and choosing ‘Add’ or ‘Remove’. The choices will then populate the dropdown lists for all the Iron Mountain Delivery Priorities in the application. *Note: Found in 3.15.1 and above only*
Email Address	Address that will receive notifications from Gimmal Physical when orders are submitted to Iron Mountain. This address is valid for the scope chosen in the next field.
Scope	Who will have order notifications sent to the chosen address in the Email Address field: • System: Everyone logging into the application • Role: Everyone in the role of the logged-in user • User: Just the logged-in user
Iron Mountain FTP URI	Drop down a list of the addresses of the FTP Site to upload Iron Mountain files. The label following this drop-down list will read ***Testing*** or ***Production*** based on the value. The defaulted in this list.
User Name	Name of the account which has access to the FTP site.
Scope	Set the scope for the Iron Mountain User Name. Note: The default is ‘System’ which will be the choice for single-region customers. For customers with multi-region accounts, this option should be set to ‘User’.
Password	Password of the Iron Mountain account which has access to the FTP site.

Name	Description
Scope	Set the scope for the Password associated with the Iron Mountain User Name. It should match the scope of the User Name. Note: The default is 'System' which will be the choice for single-region customers. For customers with multi-region accounts, this option should be set to 'User'.
Enable Request of Files	Option to enable users to request files to be transferred to and from Iron Mountain. The default value is unchecked (False).
Upload Iron Mountain File	Options available to test or manually upload files in real-time or using the job service.
Choose File	Opens a dialog box to select an Iron Mountain formatted file created by Gimmal Physical to use in testing, or to manually load into the system.
Test Upload	Manual upload of a file for testing (if the URI listed is the test site) or reprocessing (if the URI listed is the production site) for the chosen file. Transfers cannot be performed when submitting an Iron Mountain request from this page, including using the 'Test Upload' button.
View	Imports the file that is on the listed FTP site into the View window (on the left for review.
Schedule	Runs the file through the scheduled job service for testing (if the URI listed is the test site) or reprocessing (if the URI listed is the production site) for the chosen file. The file processed via the service can be viewed in the box on the right side of the screen. Transfers cannot be performed when submitting an Iron Mountain request from this page, including using the 'Schedule' button.

Name	Description
Job Status	The results of the tested job, run from either the 'Test Upload' or 'Schedule'

1.4.2.6.6.4 Setup

- A location record must be designated as an Iron Mountain location by choosing Iron Mountain as the Off-Site Vendor. Multiple Iron Mountain locations are supported.
- Transit Information will also need to be entered for:
  - Any location that will have items picked up from or delivered to.
  - Any User that will have items picked up from or delivered to Iron Mountain.
- Customer record(s) will need to be created that contain the Customer ID and District ID assigned by Iron Mountain. Additionally, address information and contact name can be entered.
- Box records will need to have a current location, an IM Box Size value, a Customer ID, and a District ID before they can be requested for pickup or delivery.
- File records will need to have a current location, a Customer ID, and a District ID before they can be requested for pickup or delivery.
- If records are updated in such a way that makes them invalid for Iron Mountain requests after a successful request has been made but before they have been submitted to Iron Mountain errors will be displayed on the view requests page. Items in error will be back colored in yellow. The issue for a given record can be seen by mousing over the item description hyperlink.



For request pickups, the destination will need to be set to an Iron Mountain location.

If you are using the Iron Mountain connector with multiple Iron Mountain accounts in multiple regions (i.e. multi-region accounts), There are several items to note to ensure the correct setup:

1. Only 3.15.1 with hotfix enabled will support multi-region Iron Mountain accounts.
2. In the Configuration page Settings for the Iron Mountain Connector, the '*Scope*' for both the User Name and Password must be set to 'User'.
3. There must be an Iron Mountain location per region.
   a. The specified Iron Mountain locations must be 'Hub' locations.

4. Each user who can submit requests in Gimmal must have a separate account per region where the request will be submitted. The users must switch to the appropriate account to submit requests for the associated region.
5. In Preferences, for each of the User Accounts, the preference for Iron Mountain location must be set to the associated location or the regions.

1.4.2.6.6.5 For Gimmal Physical 3.14 and below

If you are using the Iron Mountain integration, Gimmal strongly recommends you upgrade to 3.15.1 or above to use the most current format and advanced options.

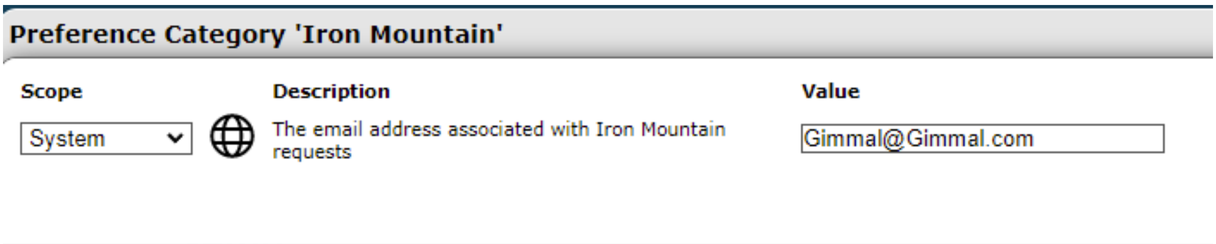
Iron Mountain account information must be entered in the Gimmal Physical Application Settings page.

The path to the folder on the ftp site associated with Iron Mountain	sftp://ftp.imlink.ironmountain.com/toplus/
The Username for the ftp site associated with Iron Mountain	gimmal
The password for the ftp site associated with Iron Mountain	•••••••••••••

- The path to the folder on the sftp site associated with Iron Mountain.
- The Username for the sftp site associated with Iron Mountain.
- The password for the sftp site associated with Iron Mountain.

Preferences

A preference setting is available to enter an email address that will receive notifications when orders are submitted to Iron Mountain.



Note: In 3.14 or below, the integration value for locations and boxes does not choose Iron Mountain as the Off-Site Vendor. Rather there is a special checkbox noted as 'Is Iron Mountain' which designates the item as being associated with Iron Mountain.

Additional information on the technical aspects of the Iron Mountain integration can be found here.

1.4.2.6.7 User Guide for O'Neil Bridge Integration

1.4.2.6.7.1 Overview

This guide covers the Gimmal Physical O’Neil Bridge integration. O’Neil Software is a critical component for storage operations in many independent off-site record centers. Gimmal Physical offers a SOAP based connector to seamlessly automate the request, pick, and reconciliation of boxes with key off-site vendors. Some caveats:

- The Record Center which uses O’Neil must support the O’Neil Bridge software.
- O’Neil integration can only be used for Box orders.
- Open shelving orders are not supported.

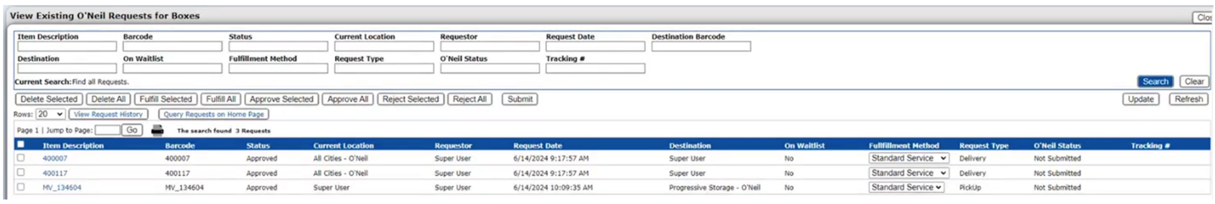
> The O’Neil Bridge connector is only supported in Gimmal Physical 3.15.1 and above.

1.4.2.6.7.2 Features

Manage and Review O’Neil Requests

There is an O’Neil Requests page to manage requests for items going to or coming from an O’Neil affiliated Record Center. Click the ‘O’Neil Box Requests’ link to open the View O’Neil Requests page.

The View O’Neil Request page enables the submission of requests directly to the O’Neil Bridge API.



The top portion of the screen can be used to query requests with the ‘Current Search’ showing the applicable query in effect.

There are several buttons which allow the user to take action:

- **Delete Selected** - permanently removes the requests selected in the lists and request table
- **Delete All** - permanently removes all the listed requests and removes them from the request table
- **Fulfill Selected** - Transfers the selected items after they have been submitted and the O’Neil Status has been updated to ‘Fulfilled’.

- **Fulfill All** - Transfers the all applicable items listed on all pages. Items must first have been submitted and the O'Neil Status has been updated to 'Fulfilled'.
- **Approve Selected** - Approve the request for the selected items.
- **Approve All** - Approve the request for the all items on all pages of the list.
- **Reject Selected** - Reject the transfer request for the selected items which changes the status to 'Rejected', but does not remove them from the list. At a certain point (which is set up in the P
- **Reject All** - Reject the transfer request for the all items on all pages of the list which changes the status to 'Rejected', but does not remove them from the list.
- **Submit**: Submits all Approved items to O'Neil Bridge for pickup or delivery.

Note:

- Items must be '**Approved**' before they can be submitted
- Depending on the setting in the O'Neil Integration configuration screen, users have a choice to transfer the item within Gimmal Physical immediately after the 'Submit' button is clicked or wait until a further time to transfer the items within Gimmal Physical using the Fulfill buttons.

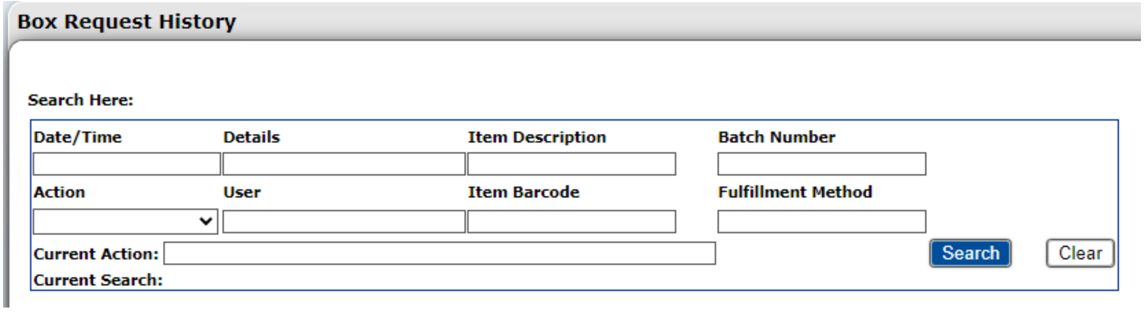
O'Neil Status Notes

The connector updates the O'Neil status once the Manage Request page is refreshed. These are the status fields:

- **Pending**: Gimmal Physical has initiated the order and updated the box fields for Off-Site Vendor and GUID if it is a new box.
- **Submitted**: O'Neil has acknowledged the order and Gimmal Physical can show the tracking number for the request.
- **Work Order**: O'Neil has begun processing the request
- **Fulfilled**: Depending on the setting in the O'Neil Configuration
  - Transfer Automatically:
    - Pickups and Deliveries are automatically transferred within Gimmal Physical once the Fulfilled state is reached. The associated requests will disappear from the requests list once the page is refreshed.
  - Transfer Manually
    - Pickups are transferred automatically once fulfilled
    - Deliveries will only be fulfilled when:
      - The O'Neil Status is Fulfilled
      - The box is transferred by:
        - The normal method for transferring boxes (transfer page, scanner, etc.)
        - An approver using the 'Fulfill Selected' or Fulfill All' buttons

There are several available page options:

- The number of rows shown on the page can be adjusted using the ‘Rows’ Dropdown.
  - 50 is the maximum value
- *View Request History* will open the ‘Box Request History’ page which allows users to locate the request history by querying a variety of options:



- *Query requests to the Home Page Grid* will collect all items from the current query and move them to the Home Page Grid. This view has additional values, actions, and queries available for management of the items.

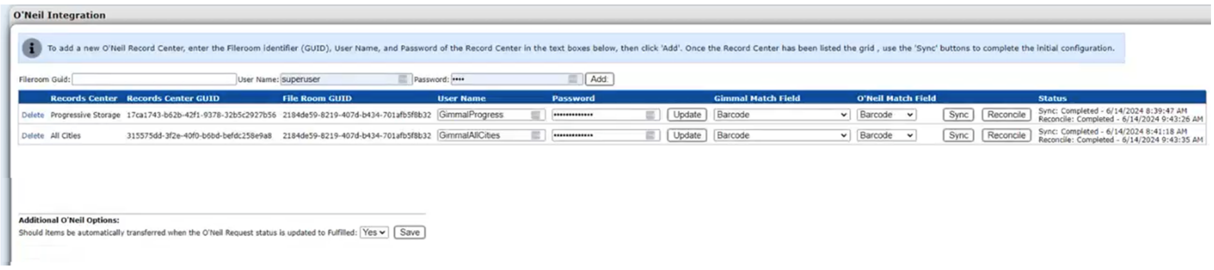
Helpful Tip

A selection for Off-Site Vendor is not needed for new boxes as long as the request destination is an O’Neil Record Center location. Having O'Neil as the choice of Off-Site Vendor for a box represents the fact that O'Neil has knowledge of and has registered the Box. New boxes don’t need this value from the O'Neil perspective ***until*** they are picked up for the first time. From within Gimmal Physical, the Off-Site Vendor selection will not be enabled until a new Box is first transferred to an O'Neil Record Center. The workflow is intended to be the following:

1. User creates a Box. At this point, the new Box will have the default *Current Location* of the User, and the default *Home Location* of O'Neil.
2. User requests pickup of the Box to be sent to O'Neil. Because the default *Home Location* is already O'Neil, no changes should be needed on the request page.
   Note: If the default home location was **not** set in the earlier step, ensure that the O'Neil location is specified as the new destination as part of the request.
3. Because the Box is being sent to O'Neil, it will appear in the O'Neil requests queue.
4. When the request is submitted from the O'Neil request queue page, it will be processed through the O'Neil integration. This step will assign *O'Neil* as the Off-Site Vendor value at the Box level and update the O’Neil matching GUID when the ‘Submitted’ status is reached.
5. From this point forward, the Off-Site Vendor value will be set to O'Neil for that Box. Any subsequent requests for that box will go directly through the O'Neil queue.

1.4.2.6.7.3 Settings

The configuration settings for O'Neil can be found on the O'Neil Integration page accessed via the Integration section on the Administration page. This is reached by clicking the ‘Admin’ option on the navigation bar.



Initial Setup

Multiple Off-Site Record Centers are supported by both O’Neil and Gimmal Physical. Communication is handled on the Record Center level.

Adding a New Record Center

To enter a new Record Center, the end user must have the following information:

1. Fileroom GUID
2. Record Center Username
3. Record Center Password

Clicking the ‘Add’ button will populate the Record Center list.

Syncing Records

Once the Record Center has been established, and box data has been entered or imported into Gimmal Physical, records can be synchronized. To synchronize, first the matching fields must be established between Gimmal and O’Neil, then click the Sync button. To see the updated status of the sync, refresh the screen. The Sync status along with the date/time of last update will show in the ‘Status’ column. This may take a significant length of time depending on the volume of records processed.

Reconciling Records

Although the automation of requests using the O’Neil Bridge connector significantly decreases errors and miscommunication between Record Centers and users of Gimmal Physical, audits of the holdings should be performed occasionally. To facilitate this, Gimmal Physical has three reports that support a reconciliation feature for O’Neil Bridge enabled Record centers.

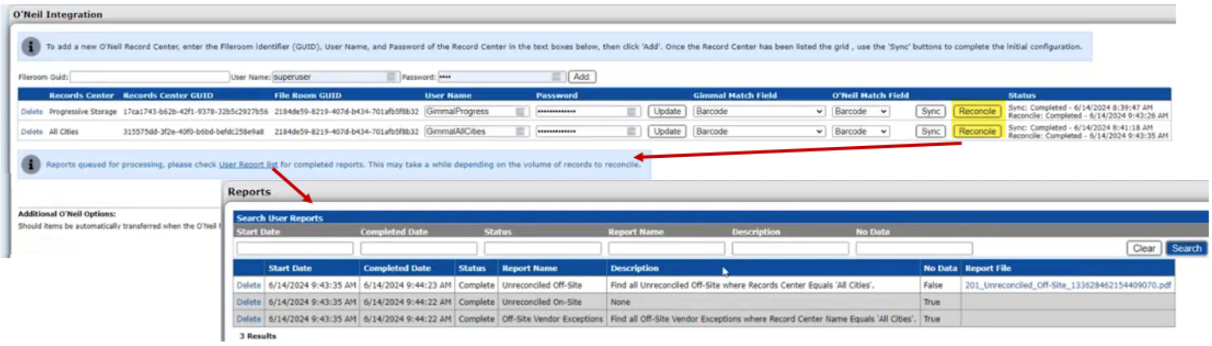
To initiate the process, first run the reconciliation by clicking the ‘Reconcile’ button for a specific record center. This kicks off the process of comparing inventory in three methods, each with its own report:

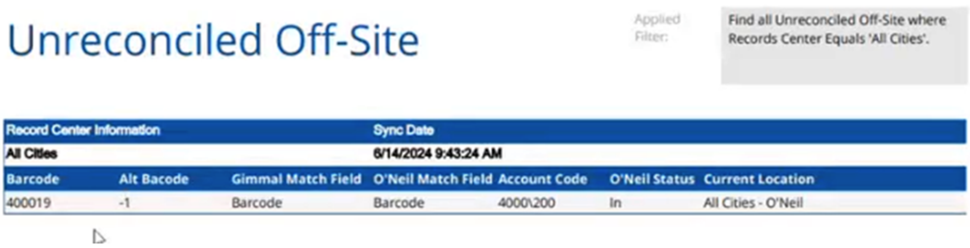
- Items that O’Neil has listed but Gimmal Physical does not (UnReconcilled Off-Site report)
- Items that Gimmal has listed as an O’Neil box, but O’Neil does not (UnReconcilled On-Site report)
- Off-Site Vendor Exceptions report:

- Items that O'Neil has listed as customer boxes, but Gimmal Physical does not have the box in its system
- Items that Gimmal Physical lists as a Record Center box, but O'Neil does not have a record of it

> This job may take a significant amount of time, the screen can be refreshed to see the updated status, or, you may want to run it overnight.

Once the job has been completed, click the link for 'User Reports' to navigate to the Reports page where the three available reports will be at the top of the screen.





To access the reports based on the information from the last 'Reconcile' run, find the Reports view via the navigation menu at the top of the application and scroll to the appropriate section.

1.4.2.6.7.4 Configuration Notes

- A location record must:
  - be designated as an O'Neil location by choosing O'Neil as the Off-Site Vendor.
  - have a default fulfillment method chosen.
- Transit Information will also need to be entered for any User that will be either requesting pickup or delivery to or from O'Neil Record Centers.
- Box records will need to have a current location and a Record Center value
- For request pickups, the destination will need to be set to an O'Neil location.

- A location record must be designated as an O'Neil location by selecting O'Neil as the value for the Off-Site vendor for a given record. Multiple O'Neil locations are supported.
- Transit Information will also need to be entered for any location that is an O'Neil location.

1.4.2.6.8 User Guide for Laserfiche Integration

1.4.2.6.8.1 Overview

The Laserfiche Integration allows for Gimmal records of various types to be linked with Laserfiche documents, making these records searchable within Laserfiche. When records are created, updated, deleted, or expunged in Gimmal, the same changes are made to the corresponding documents in Laserfiche.

1.4.2.6.8.2 Configuring the Laserfiche Integration

The Laserfiche CMIS Gateway must be installed and correctly configured for the Laserfiche

Integration to work. Please see documentation from Laserfiche for completing this step. Once the CMIS Gateway is in place, configure the following settings on the Application Settings page in Gimmal:

- *Laserfiche CMIS Gateway URL* – The service URL of the CMIS Gateway browser binding service (e.g. https://example.domain/lfcmis/browser).
- *Laserfiche Repository* – The name of the Laserfiche repository.
- *Laserfiche Username* – The username of the dedicated account that Gimmal will use to connect to Laserfiche. At minimum, this account should possess sufficient rights to create, update, move, and delete documents.
- *Laserfiche Password* – The password of the dedicated account that Gimmal will use to connect to Laserfiche.

To finish configuring the Laserfiche integration, go to the **Admin** menu and select **Laserfiche Integration**.

Access to this page is governed by role permissions, so the **Configure Laserfiche Integration** right must be granted to the role of the user doing the configuration.

On the **Laserfiche Integration** page, select a **Gimmal tab** and a **Laserfiche template**, and click the **Link** button on the right to link the tab with the template.

Each tab may only be linked with one template, but multiple tabs may be linked to the same template.

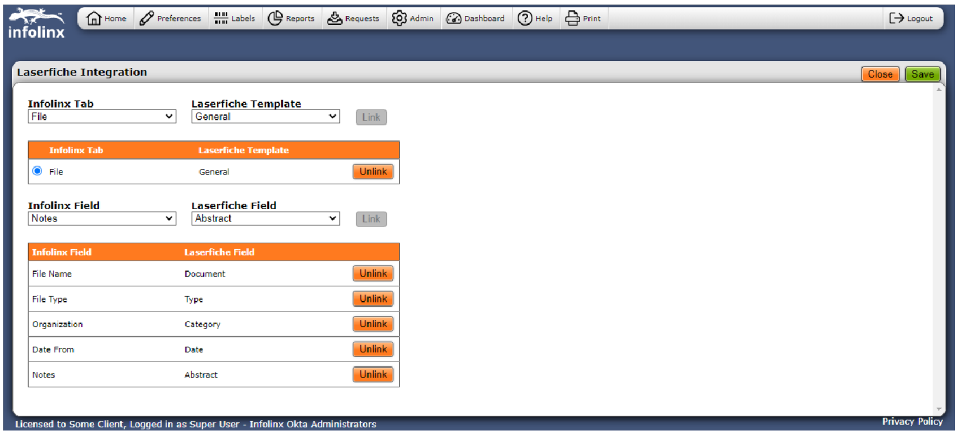
To unlink a Gimmal tab from a Laserfiche template, click the **Unlink** button for the tab’s row in the linked tabs grid.

To link the fields of a Gimmal tab with the fields of a Laserfiche template, first select the tab in the linked tabs grid. Below, select a Gimmal field and a Laserfiche field, and click the **Link** button on the right to link the fields.

Each Gimmal field may only be linked with one Laserfiche field and vice versa. To unlink a Gimmal field from a Laserfiche field, click the **Unlink** button for the field’s row in the linked fields grid.

When the configuration is complete, click the **Save** button in the top right corner to save changes.

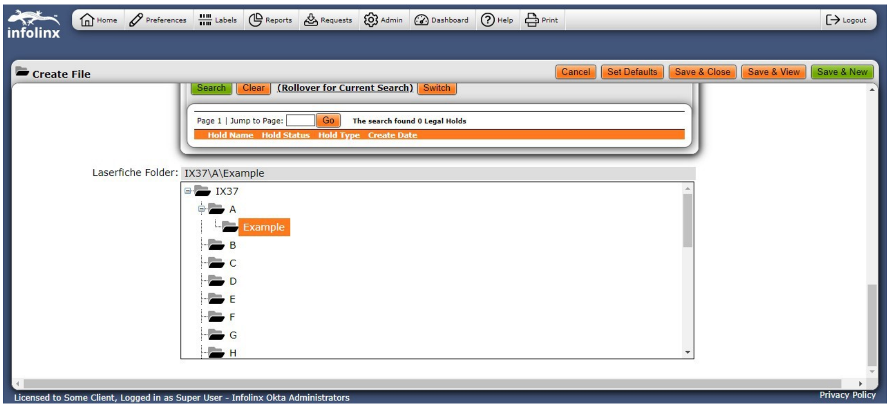
Alternatively, click the close button at any time to discard changes and return to the Admin menu.



To create a record that is linked to Laserfiche, go to the **Create** page, enter data for the record, select a **Laserfiche folder** at the bottom of the page, and save the record.

If a folder is selected, creating a Gimmal record will create a corresponding document in Laserfiche according to the settings configured on the Laserfiche integration page.

The Laserfiche document will be named with the tab and barcode of the Gimmal record (e.g. File – 0000000200) and placed in the folder that was selected on the **Create** page. Note that Laserfiche documents will not be added for Gimmal records that are created without a Laserfiche folder.



1.4.2.6.8.3 Updating Records Linked to Laserfiche

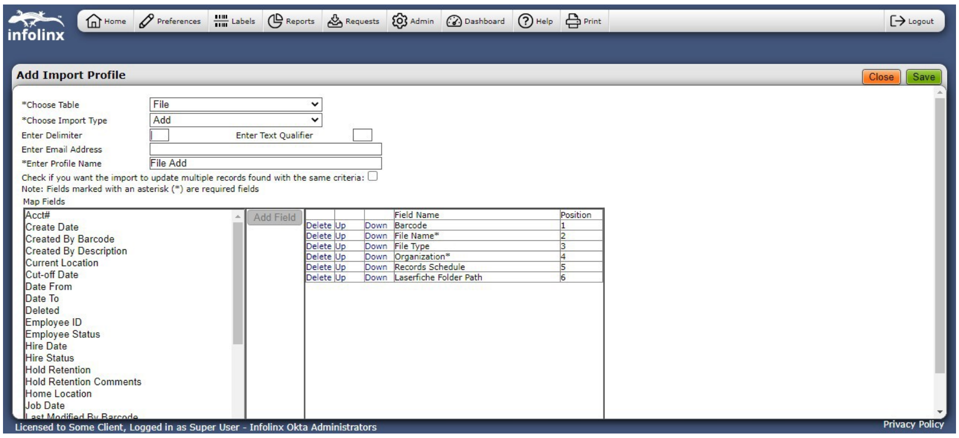
Updating the metadata of a Gimmal record will update the metadata of the corresponding document in Laserfiche according to the settings configured on the Laserfiche Integration page. If the Laserfiche folder is changed, the corresponding document will be moved to the new folder in Laserfiche. Assigning a Laserfiche folder to a Gimmal record will also create a corresponding document in Laserfiche if the record was not previously assigned a folder.

1.4.2.6.8.4 Deleting Records Linked to Laserfiche

Deleting or expunging a Gimmal record that is linked to a Laserfiche document will unlink the record and transfer the document to the Recycling Bin in Laserfiche. However, undeleting a Gimmal record that was previously linked to Laserfiche will not restore the link or move the corresponding Laserfiche document back to its original folder location.

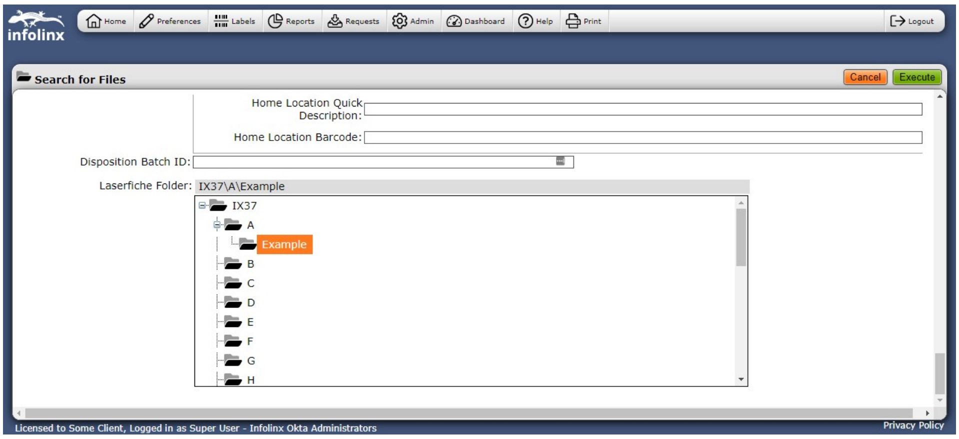
1.4.2.6.8.5 Importing Records Linked to Laserfiche

To import Gimmal records that are linked to Laserfiche, create an import profile for the linked tab, and select Laserfiche Folder Path as one of the fields. In the import data file, place the full path of the Laserfiche folder in which the documents will be created (e.g. IX37\A\Example) in the position of the Laserfiche Folder Path field. Then, execute the import.



1.4.2.6.8.6 Searching by Laserfiche Folder

To search for Gimmal records linked to documents in a certain Laserfiche folder, go to the Detailed Search page and select the Laserfiche folder in addition to any other search criteria, then click the Execute button in the top right corner to execute the search.



1.4.2.7 Modules

Gimmal Physical offers a number of modules designed to expand the flexibility of the application for specialized needs.

- Space Management User Guide (see page 197)
- Billing Module User Guide (see page 202)

1.4.2.7.1 Space Management User Guide

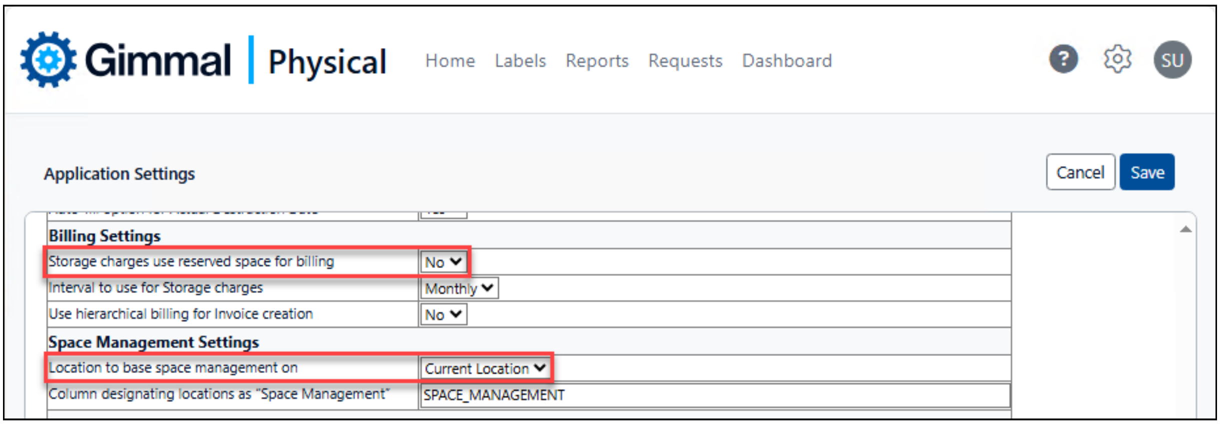
1.4.2.7.1.1 Configure Space Management

To configure space management, data needs to be entered on the Location, Shelf, and Box tabs within the Gimmal Physical system. There are key fields on each of these tabs that need to be set for the Space Management module to function correctly.

1. **Application Settings** – A parameter is available that allows Space Management to be calculated on either home or current location.
2. **Locations** – The “Space Management” checkbox must be selected for at least one of the Location records.
3. **Shelves** – The “Current Location” of the Shelf record needs to be one of the Locations where the “Space Management” checkbox has been selected. A value also needs to be selected from the “Capacity” list on the Shelf record(s).
4. **Boxes** – The “Current Location” needs to be one of the Shelves in a “Space Management” Location. A value also needs to be selected from the “Box Size” list on the Boxes tab.

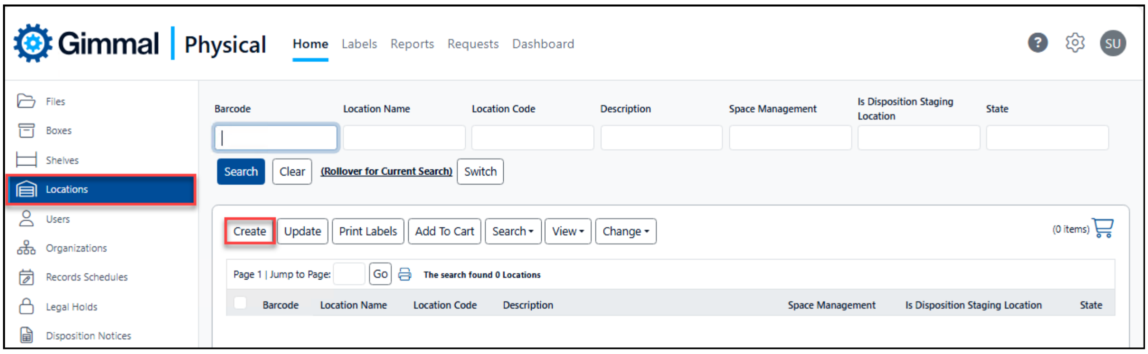
Application the Settings

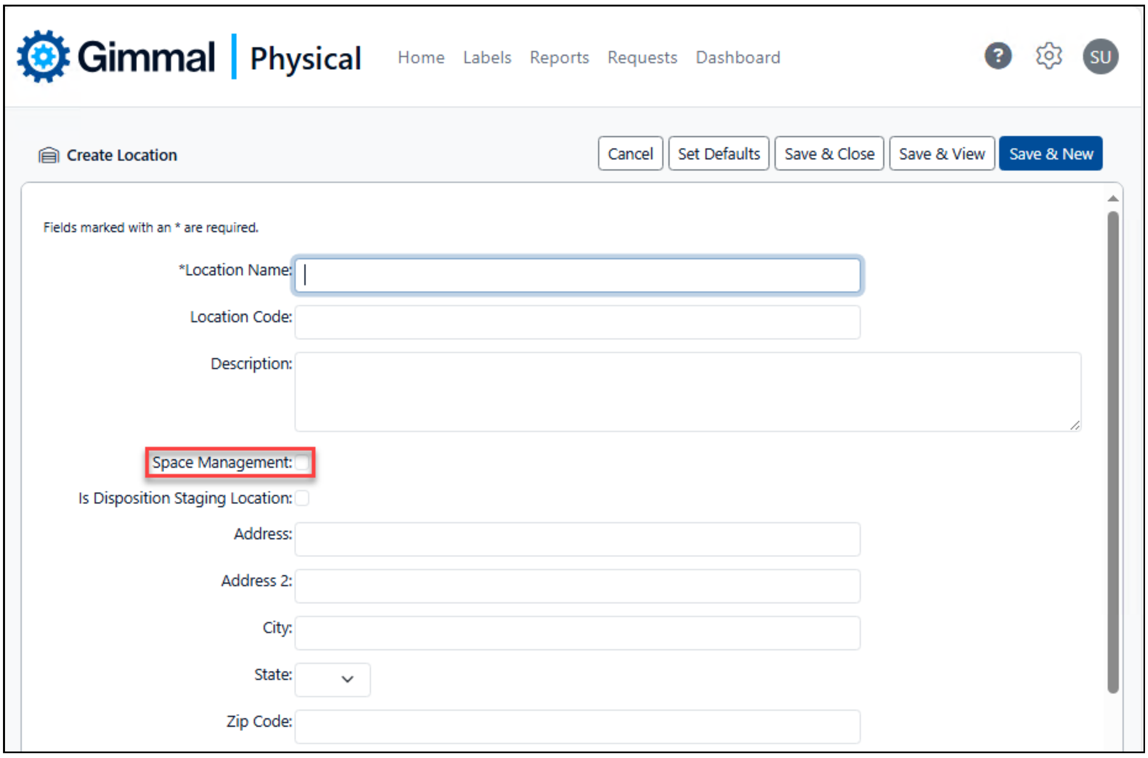
1. Click on the Admin tab.
2. Click on Application Settings.
3. Under Billing Settings | Storage charges use reserved space for billing, choose either:
   a. **Yes** - reserved space is billed if item is checked out
   b. **No** - reserved space is not billed when item is checked out
4. Under Space Management Settings | ‘Location to base space management on’, select either “Current Location” or “Home Location”.



Create Locations

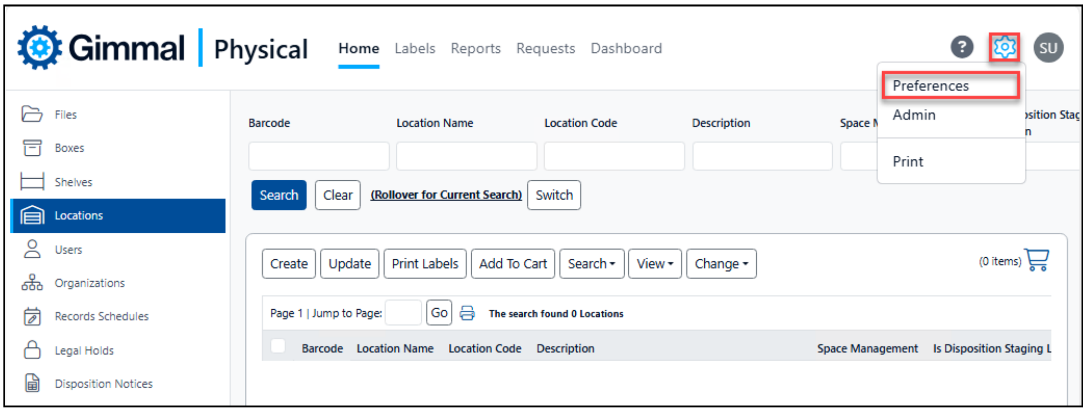
1. Click on the Locations tab.
2. Click on the Create action button.
3. Enter metadata for the Location record and check the “Space Management” checkbox.
4. Click Save & Close.



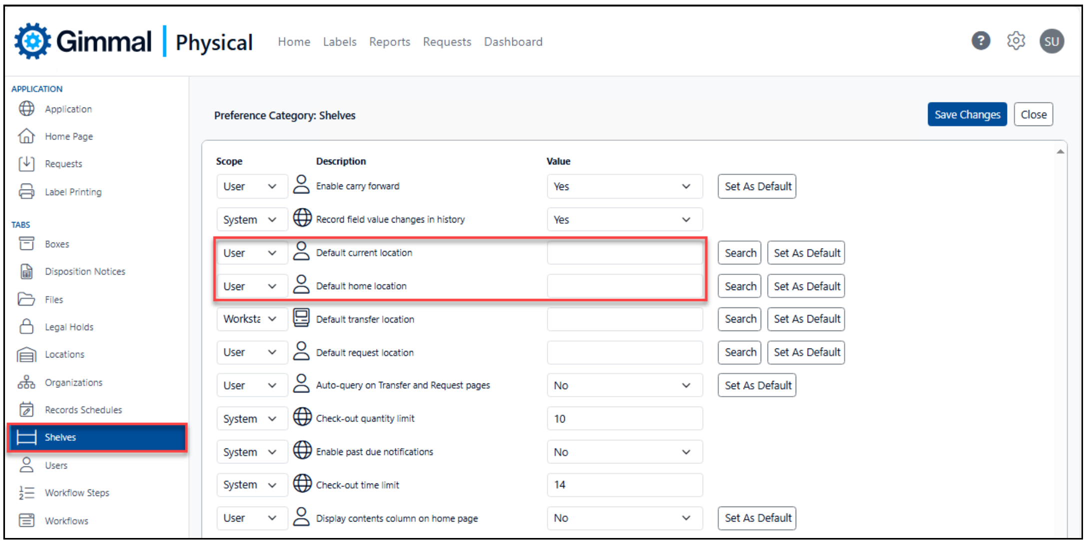


Create Shelves

1. Import Shelf data.
2. Create Shelf data from the Shelves tab.
   a. Verify preference settings on the Preference page for the Shelves category. The “Default current location” and the “Default home location” should be set to the barcode of a “Space Management” Location.



24 Accessing Application Preferences



25 Setting Shelves' preference for current and home locations

b. Click on the Shelves tab.

c. Click on the Create action button.

d. Enter metadata for the Shelf record, being sure to select a “Capacity” value.

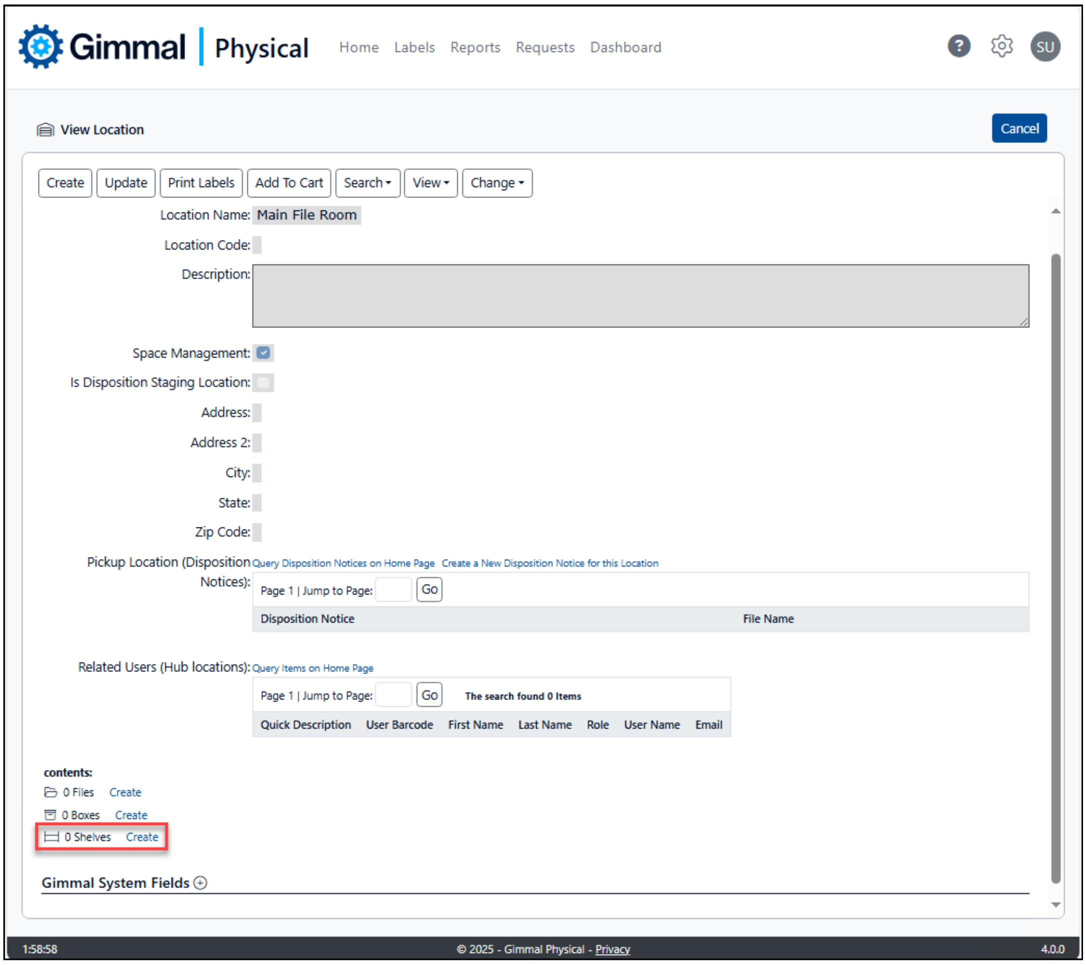
e. Save the Shelf record.

f. Verify the Shelf record was created in the “Space Management” Location.

3. Create Shelf data from the View Location page.

   a. Go to the View page for the Location where the Shelves will be placed.

   b. Click on the Create link next to the Shelf icon near the bottom of the page.

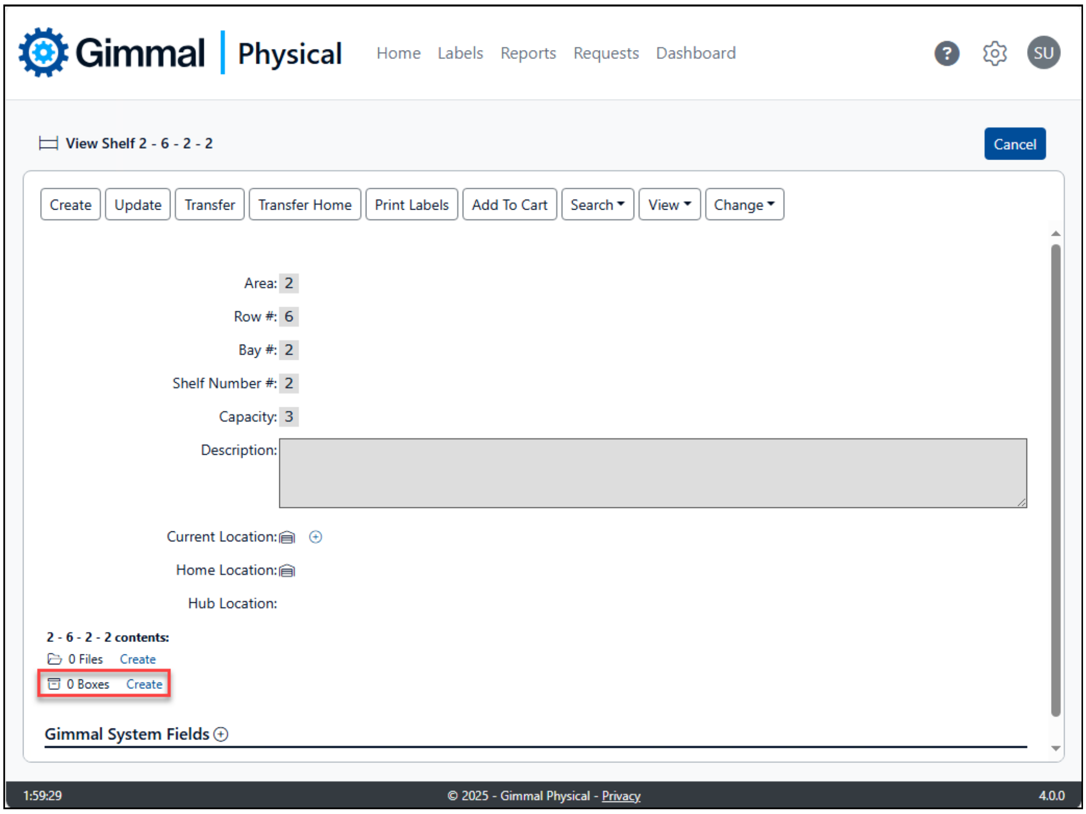


c. Enter metadata for the Shelf record, being sure to select a “Capacity” value.

d. Save the Shelf record.

Create Boxes

1. Import Box data.
2. Create Box data from the Shelf view page.
    a. Go to the View page for the Shelf where the Boxes will be placed.
    b. Click on the Create link next to the Box icon near the bottom of the page.



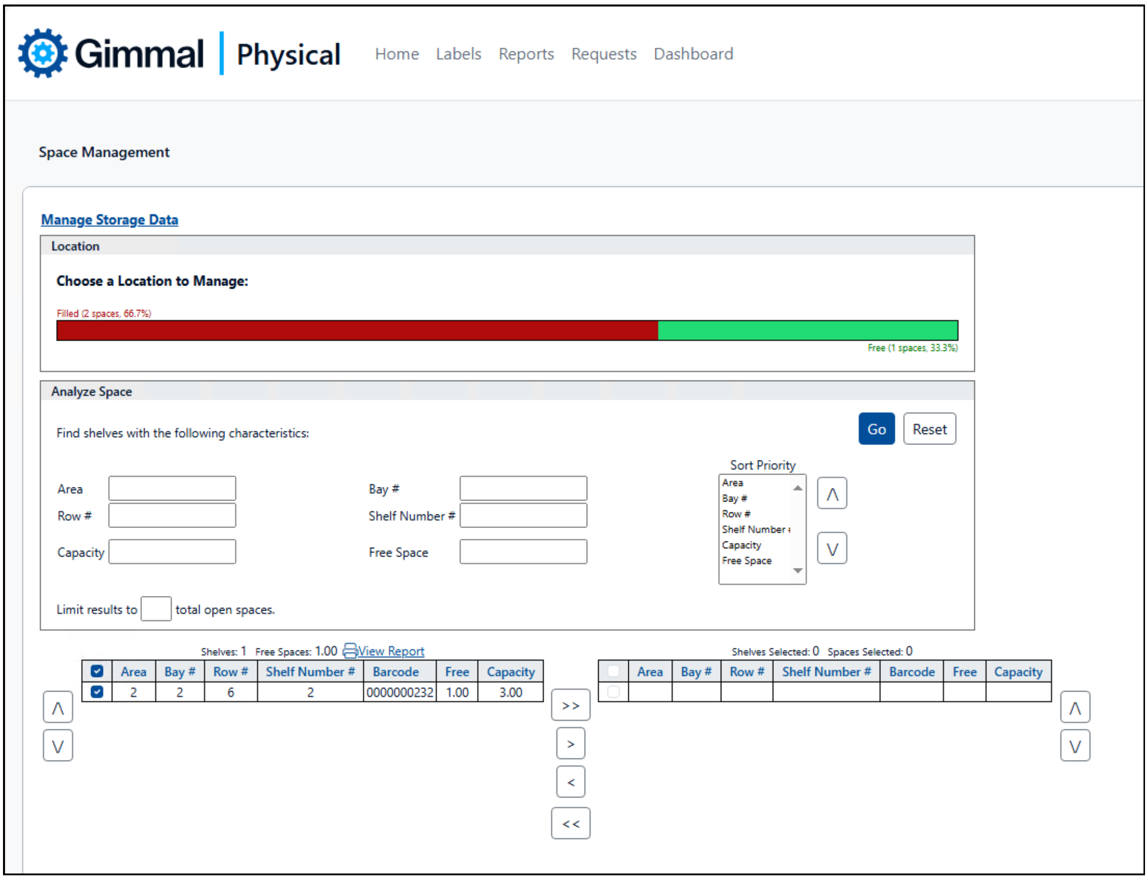
c. Enter metadata for the Box record, being sure to select a “Box Size” value.
d. Save the Box record.

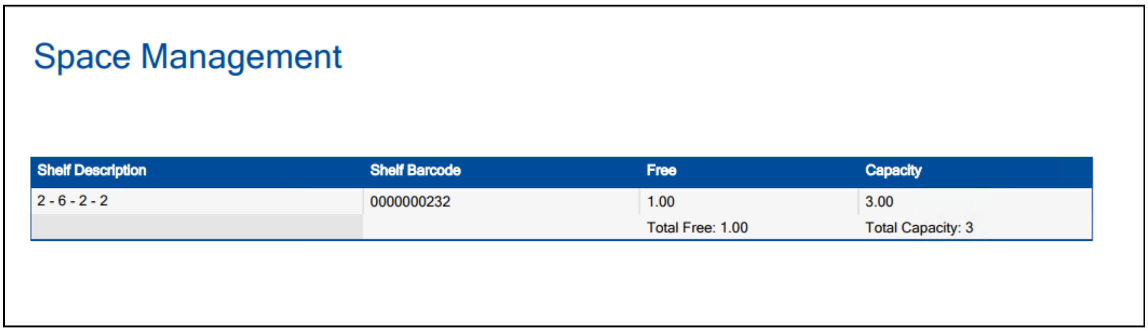
1.4.2.7.1.2 View the Space Management Page

1. Click **Admin** on the top navigation Menu.
2. Under the Data section, click **Space Management**.
3. If more than one Location is used in Space Management, select the desired Location from the list.

1.4.2.7.1.3 Searching from the Space Management Page

1. Data can be entered into the various search fields and queried by clicking on the Go button.
2. Database operators (<, >, <=, >=) can be used to query the data. Additionally, a sort order can be applied to the query by arranging the fields in the Sort Priority list box.
3. Records returned by a search are presented in grid format on the left side of the page. From here, individual records or all results can be selected and moved to the grid on the right side of the page.
4. The grids display the capacity and the free space available for each Shelf record.
5. Negative values in the “Free” column show Shelf records that are in error (i.e. more items are listed on the Shelf than it can contain).
6. Grid data can be used to print a report of the selected spaces by clicking on the printer icon above either grid.





A shelf must be expunged to be removed from Space Management

1.4.2.7.2 Billing Module User Guide

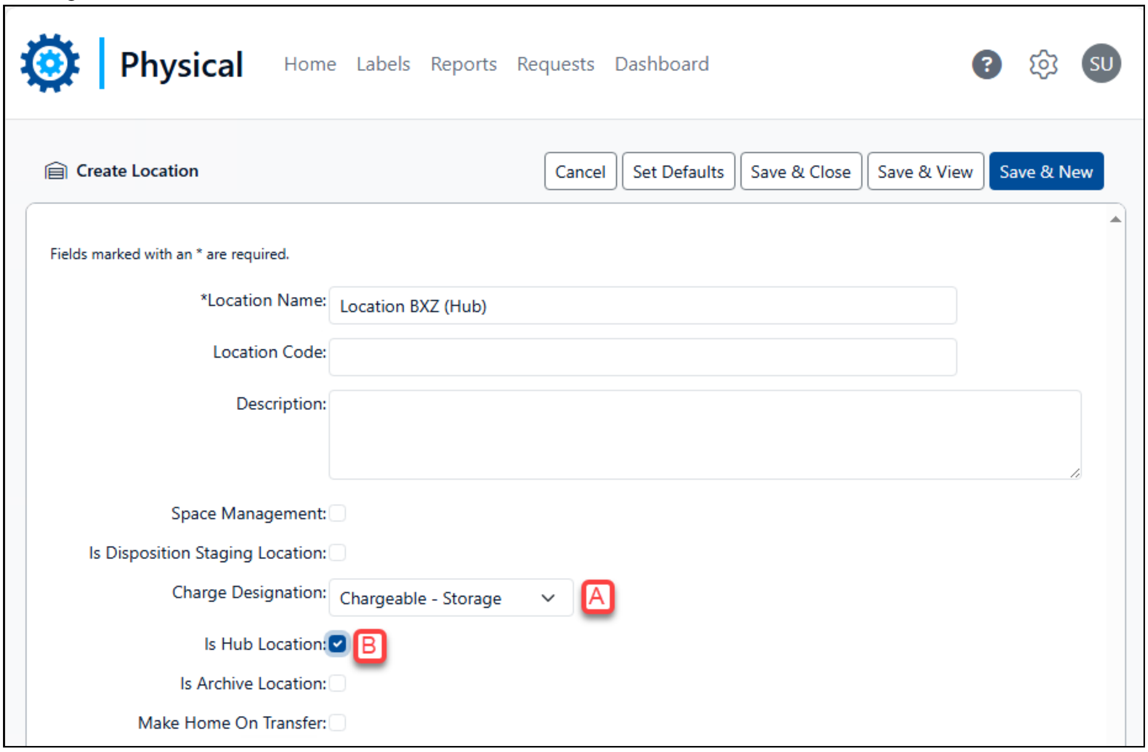
Gimmal Physical contains a number of features supporting billing activities for storage and other activities.

1.4.2.7.2.1 Configure Billing

Storage Costs

To configure billing for storage cost, information needs to be entered on several different tabs in Gimmal Physical.

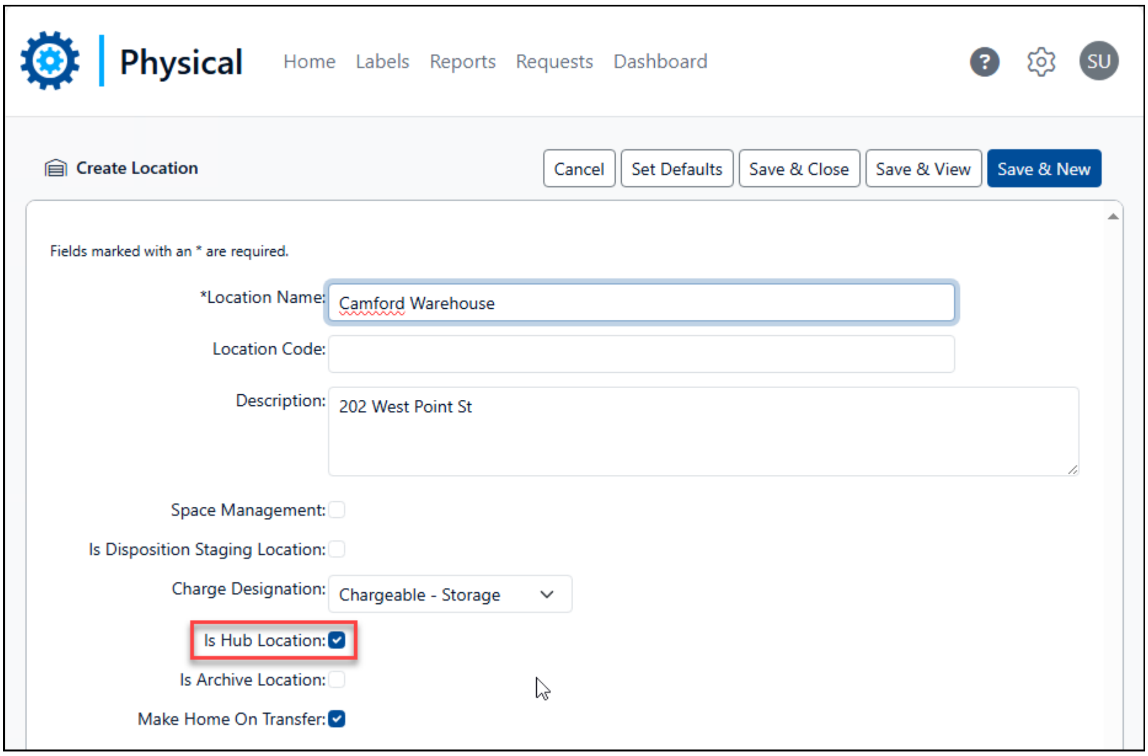
1. **Locations** – Two key values need to be set to identify a location where costs can accrue for storage.



   a. The "Charge Designation" list will need to be set to a value of "Chargeable – Storage."
   b. The "Hub Location" checkbox must be enabled for any Location where costs will accrue for Box storage.
      When these properties are set, an item transferred to one of these Locations (or to a Shelf in one of these Locations) will have its "Accession" field set to true and its "Accession Date" field updated to the current date. An item is only accessioned once.
2. **Shelves** – The "Current Location" of Shelf records needs to be one of the hub locations designated with a 'Chargeable - Storage' as noted above. When these properties are set, an item transferred to one of these Shelves will have its "Accession" field set to true and its "Accession Date" field updated to the current date. An item is only accessioned once.
3. **Boxes** – If the "Current Location" of a Box is either a Shelf or a Location as designated above for any time during the billing period, storage costs will accrue. Additionally, setting the "Box Size" for Box records will allow for different amounts to be charged based on the size of the Box.

Create Locations

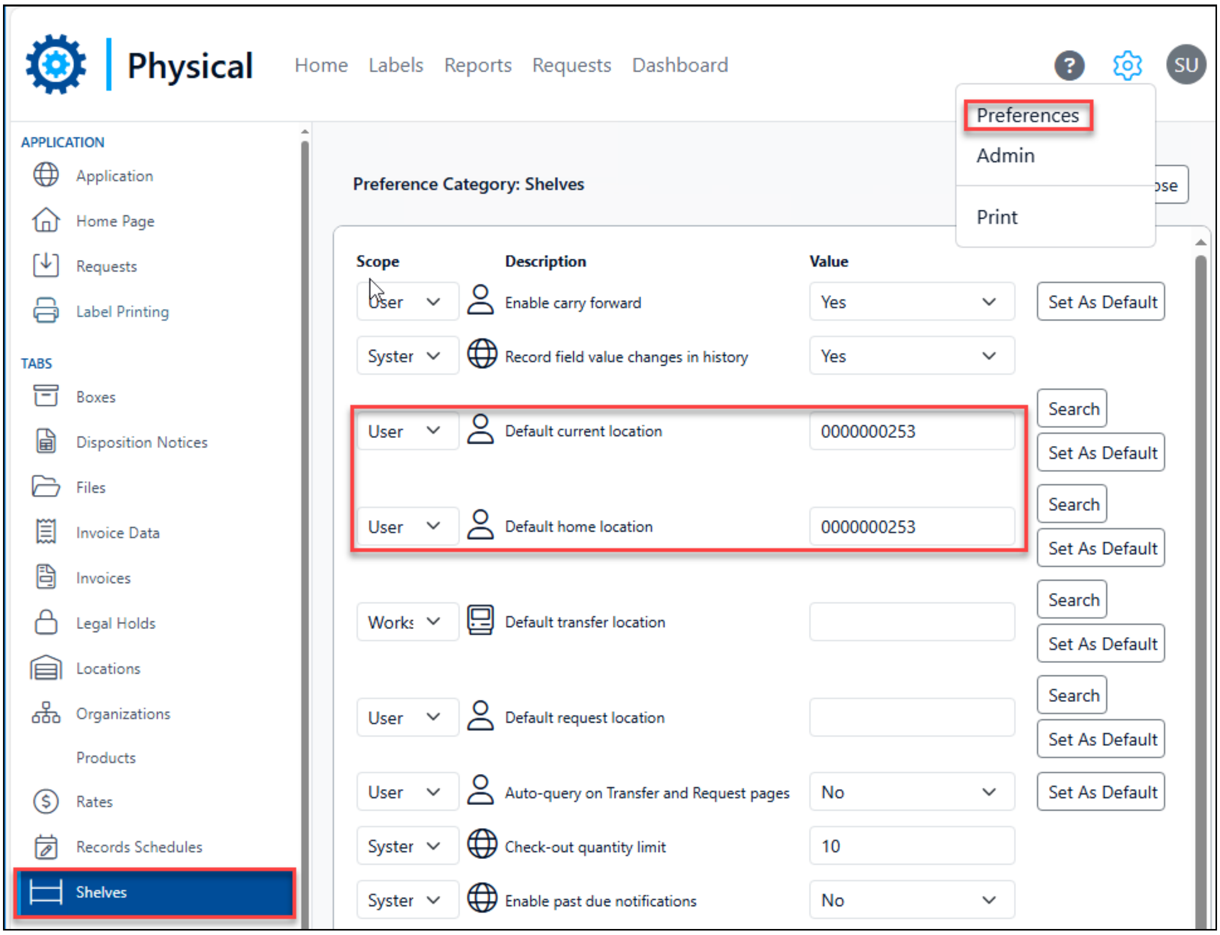
1. Click on the Locations tab.
2. Click on the Create action button.
3. Enter metadata for the Location,
    a. Be sure to check the “Is Hub Location” checkbox.
    b. Select “Chargeable – Storage” from the “Charge Designation” list. (Note: Not shown in screenshot below)
4. Click Save & Close.



Create Shelves

There are a number of methods for creating shelves. Before doing so, first verify the Preference settings in the Shelves category on the Preferences page.

The “Default current location” and the “Default home location” should be set to the barcode of a Hub Location that has been designated as a “Chargeable – Storage” Location.

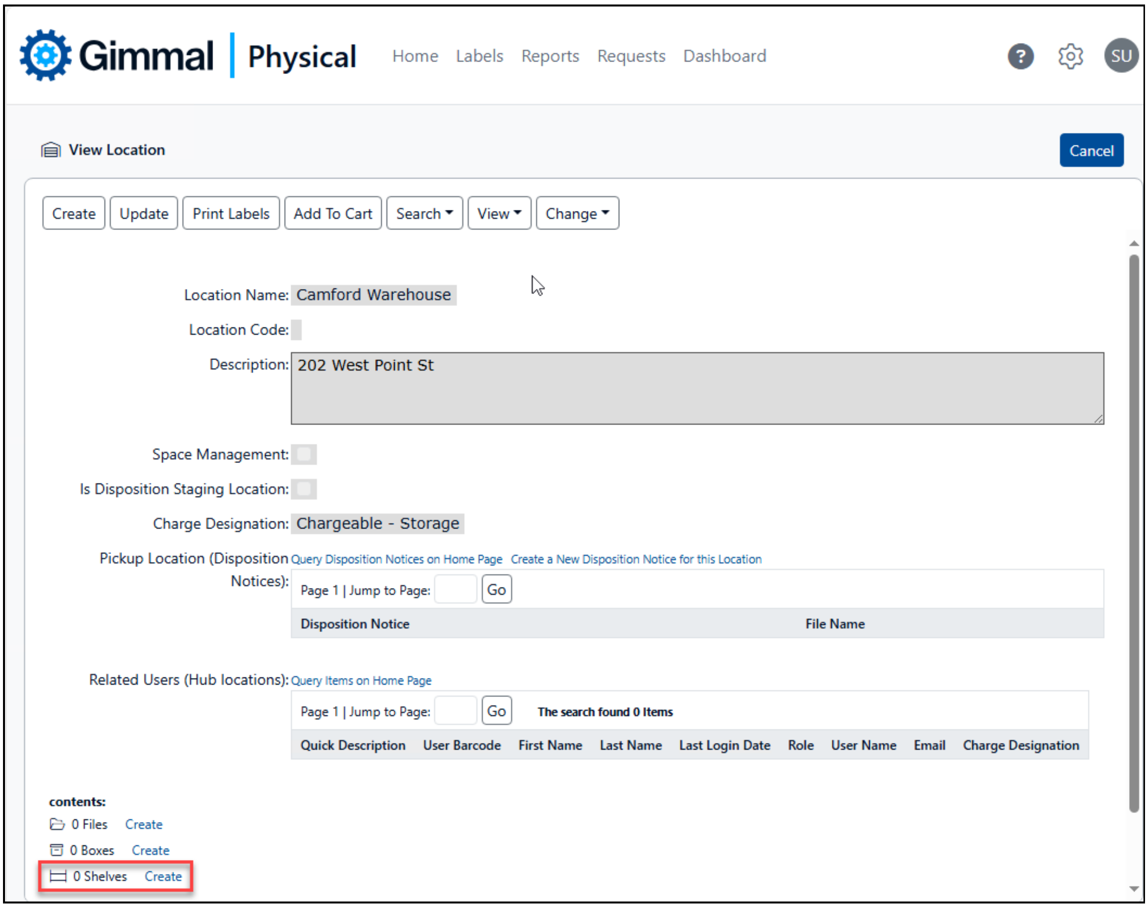


Create the Shelf from the Shelf tab

1. Click on the Shelves tab from the Home Page.
2. Click on the Create action button.
3. Enter metadata for the Shelf record, being sure to select “Chargeable Storage” from the “Charge Designation” list.
4. Save the Shelf record.
5. Verify the Shelf record was created in the specified Location.

Create Shelf data from the View Location page

1. Go to the View page for the Location where the Shelves will be placed.
2. Click on the *Create* link next to the Shelf icon near the bottom of the View Location page.



3. Enter metadata for the Shelf record, being sure to select “Chargeable Storage” from the “Charge Designation” list.
4. Save the Shelf record.

Create Shelf via Import

Please view the Import Guide (see page 65) for more information on importing data via a file import.

Create Boxes

There are a number of methods for creating boxes.

Create Box from Box tab

Please see guide to Creating & Updating Records (see page 56), Bulk Creation (see page 61) or Bulk Update for more information.

Create Box data from the Shelf view page.

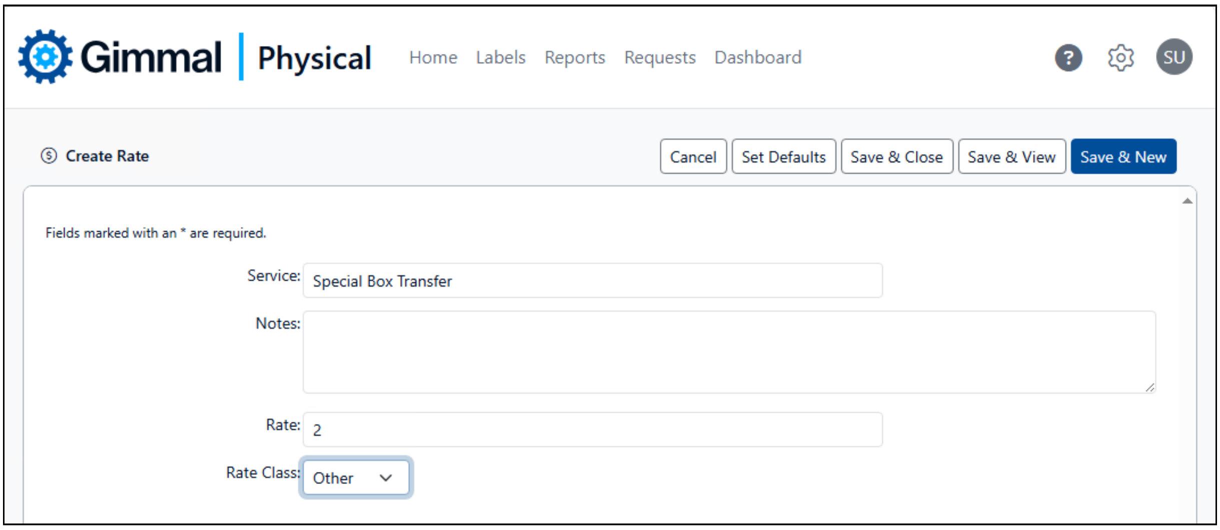
1. Go to the View page for the Shelf where the Boxes will be placed.
2. Click on the Create link next to the Box icon near the bottom of the page.
3. Enter metadata for the Box record, being sure to select a “Box Size” value.
4. Save the Box record.

Create Boxes via Import

Please view the Import Guide (see page 65) for more information on importing data via a file import.

Create Rates

Before billing can commence, Rates need to be created for associating with billing events.
Note: Rates can be created from the Create Billing Events screen, if needed.

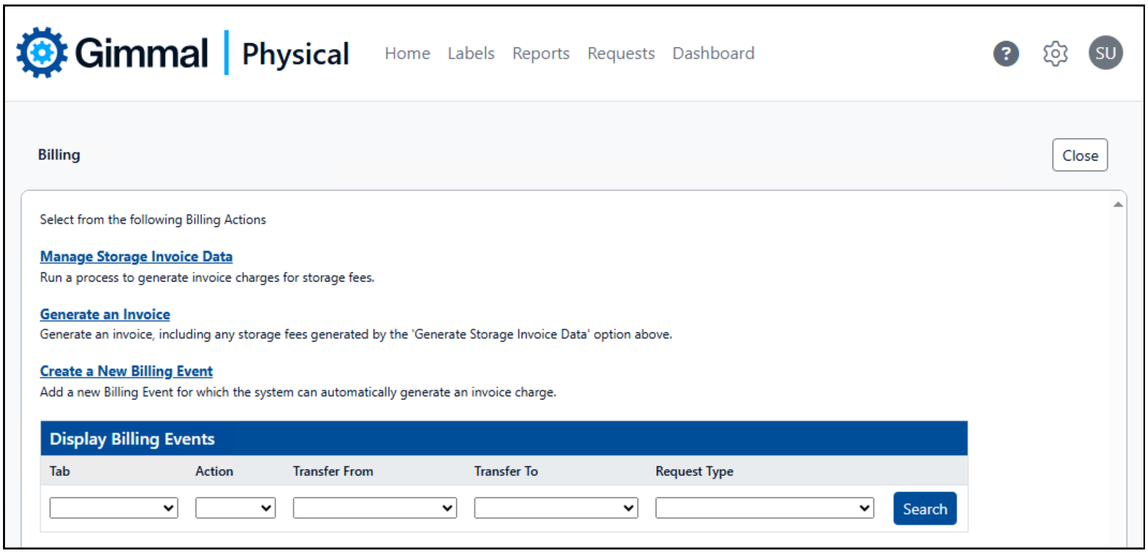


1. Select the Rates tab
2. Click the Create action button.
3. Enter data for the available fields.
4. Click on any of the available Save action buttons to save the Rate.

1.4.2.7.2.2 Billing Management

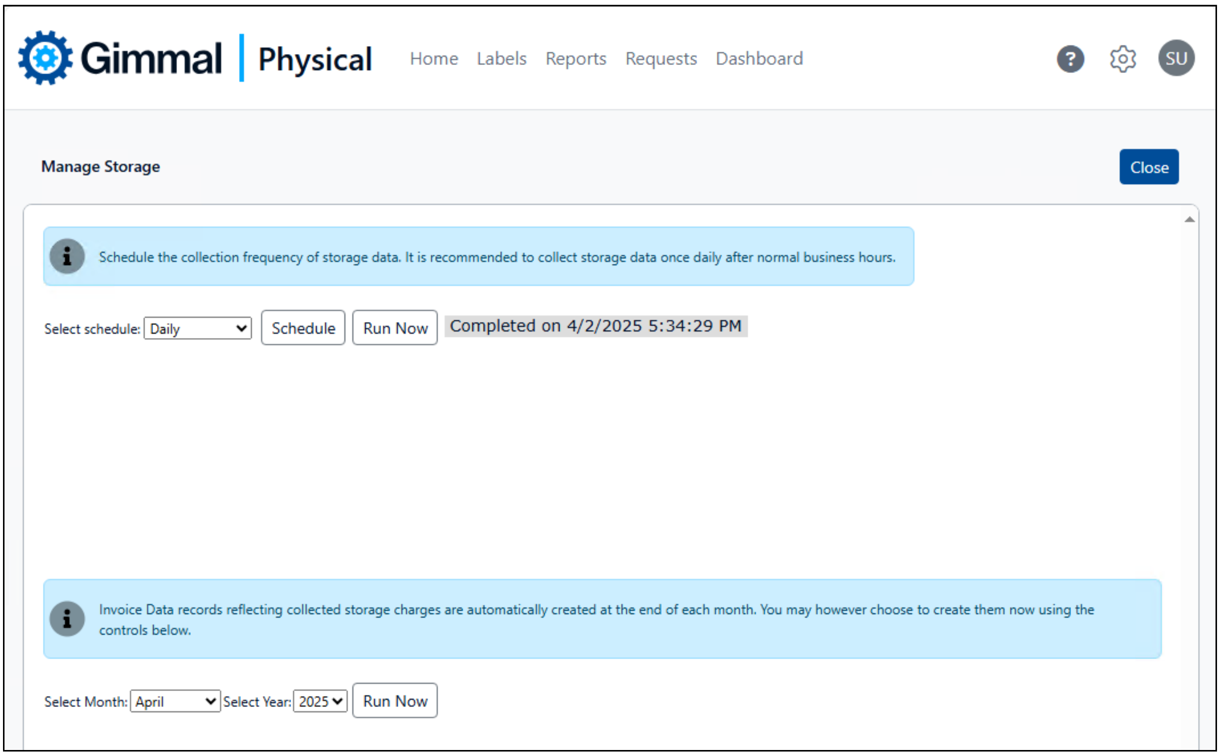
To manage the various steps in the billing process, navigate to the Billing screen:

1. Click “Admin” in the top navigation menu.
2. Under the Configuration section, click “Billing Management.”



Manage Storage Invoice Data

Set the options for collection frequency with ‘Run Now’ options for generating ad hoc invoice data records.



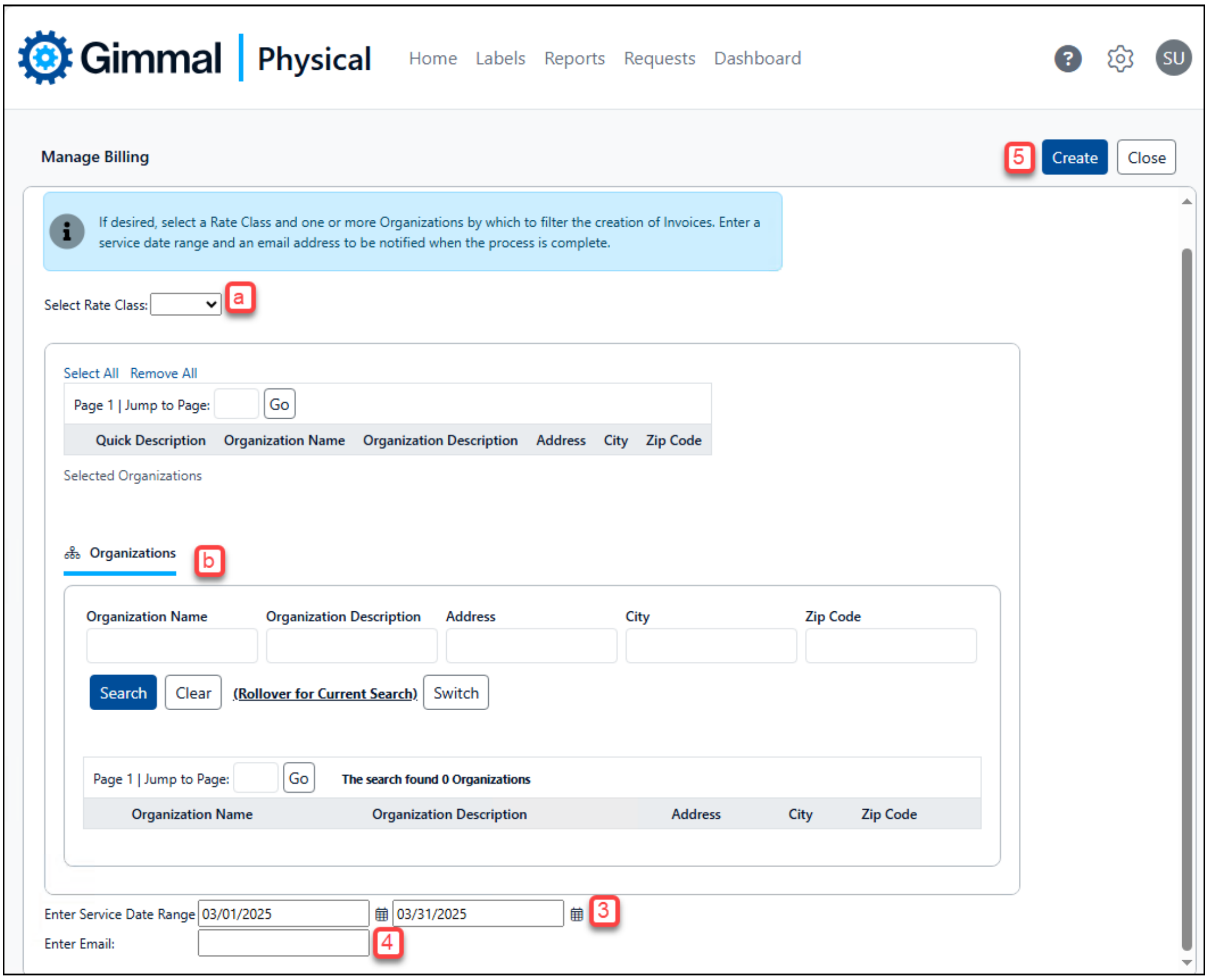
1. By default, storage charges are collected daily. This option can be changed, or a job can be run ad hoc:
   a. To change the schedule for the nightly job:
      i. Choose the preferred option from the ‘Select Schedule’ drop down list.
      ii. Choose the preferred start time.

iii. Click 'Schedule'. This will set the new option.

b. To run as a one-time, ad hoc collection job, click the 'Run Now' button. This will schedule the background job to run at the next available time.

2. Invoice data records are automatically created at the end of the month. However, there may be reasons to create them ad hoc. To do so:
   a. Select the month and year of the invoice data records you'd like to create.
   b. Click 'Run Now' to schedule the job to start at the next available time.

Generating Invoices



Before generating invoices, billing events need to be created and associated with actions, and at least one invoice data collection job should be run. Once the requisite data is in place, invoices can be generated.

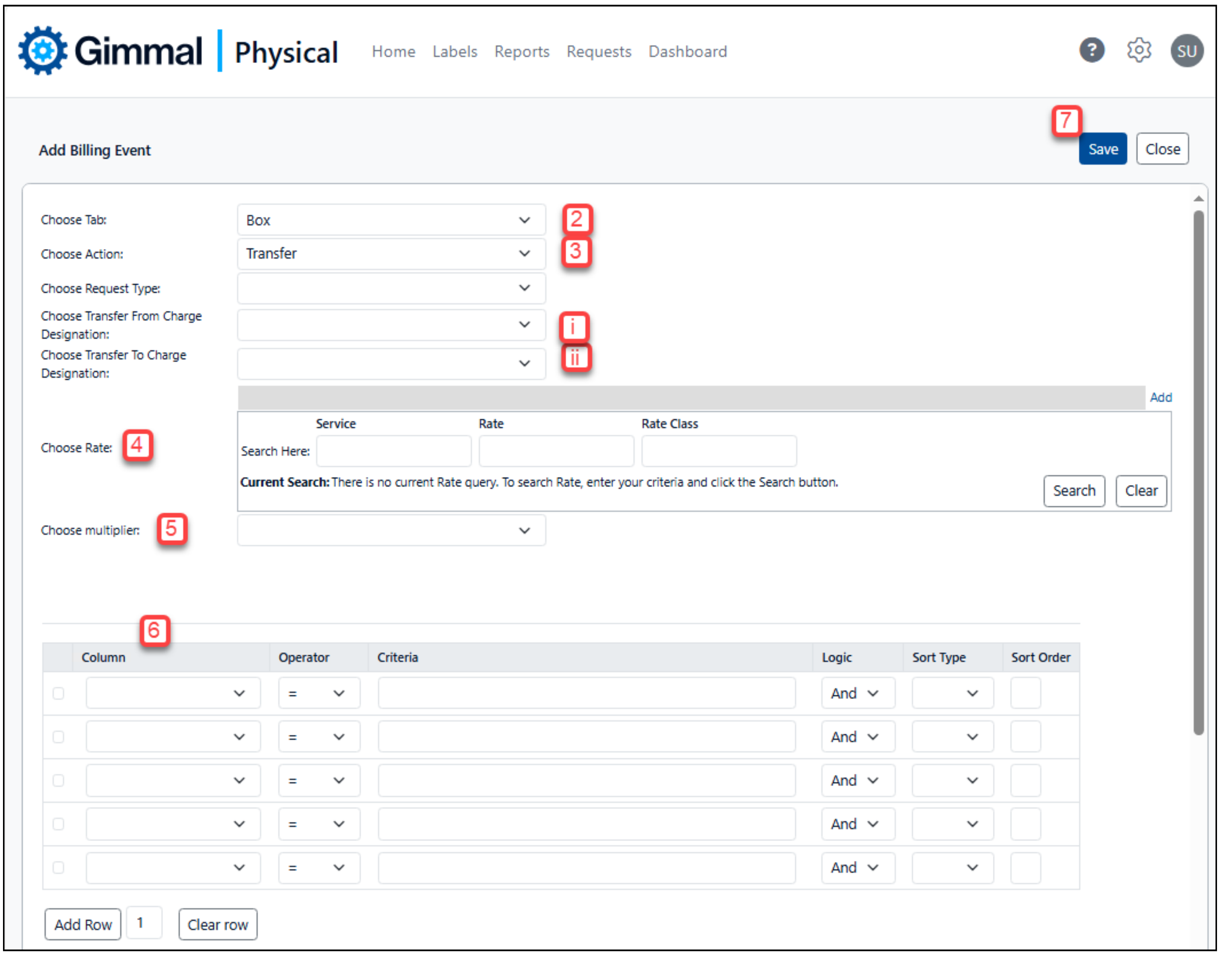
1. Click on the "Generate an Invoice" link. This opens the Manage Billing screen.
2. Invoices can be filtered by Rate Class or Organization
   a. Filter by Rate Class: Choose the preferred rate class by choosing 'Select Rate Class' drop down.

   b. Filter by Organization: Use the search control to limit the invoice creation to one or more organizations.

3. Gimmal Physical will automatically display “Service Date Range” for the month prior to today’s calendar date. The date fields can be overwritten to update to a preferred date range using the ‘Enter Service Date Range’ fields.
4. Enter an email address if you’d like a notification when the invoice creation process has completed.
5. Click the Create button. This will kick off the process.
6. Records will be created on the **Invoice Data** tab. Invoices will also be generated and displayed on the **Invoices** tab.

Create Billing Events

Billing Events are used to associate chargeable actions to established rates. Please note, fields shown on this page will depend on the selected options.



1. Click on the “Create a New Billing Event” link from the Billing Management screen.
2. Select the tab for this billing event by choosing an available option from the ‘Choose Tab’ drop down list.

3. Select the action for this billing event by choosing an available action from the 'Choose Action' drop down. Actions include:
   a. **Accession** occurs when an item is transferred to a hub location for the first time.
   b. **Create** occurs when an item is created in the system.
   c. **Delete** occurs when an item is deleted from the system.
   d. **Delivery** occurs when items are transferred from a hub location.
   e. **Storage** is used to charge for the storage of items.
   f. **Transfer** occurs when items are moved between records with specified "Charge Designations". There are configurable options for this action:
      i. Request Type can used as a cost factor when setting up Transfer rates. To do so, select from the 'Choose Request Type' drop down list.
      ii. "Transfer From" and "Transfer To" Charge Designations will also need to be set for Transfer actions.
   g. **Update** occurs when item records are updated.
4. Choose a Rate from the Rate control by using the 'Search'. Alternately, click on the Add button to add a new Rate for this action.
5. Select a multiplier (optional). Any fields that are defined as integer fields will be displayed in this list.
6. Logic can be added using the filters to further refine which items will receive this charge (optional).
7. Click the Save button.

Once configured, when any of these billing events occur occur in the application, records will be created on the Invoice Data tab.

Display Existing Billing Events

To view billing events which have already been created, use the available filters and click 'Search'

1.4.2.7.2.3 Billing Related Administrator Settings

Use hierarchical billing for Invoice creation

This option is only applicable for installations which are configured to have a hierarchical organization structure. By enabling this option, billing can be performed on the preferred organization level, rather than just the organization level which incurred the charge.

- Options: Yes/No

Interval to use for Storage charges

Option to determine at what interval the storage charges will be collected. For more fine tuned billing and reporting, the Daily option can be used. For billing entire month for any part of the month, choose 'Monthly'. 'Monthly' is the default.

- Options: Daily/Monthly

Storage charges use reserved space for billing

By selecting 'Yes', storage charges continue to accrue even when an item is checked-out. This essentially reserves the space for the eventual return of the item. The default is 'No'.

1.5 Technical Guides

Please use the tree view on the left or links below choose the appropriate article of interest.

1.5.1 Security Model Overview

This topic has an interactive tutorial. To view this tutorial, click here[31].

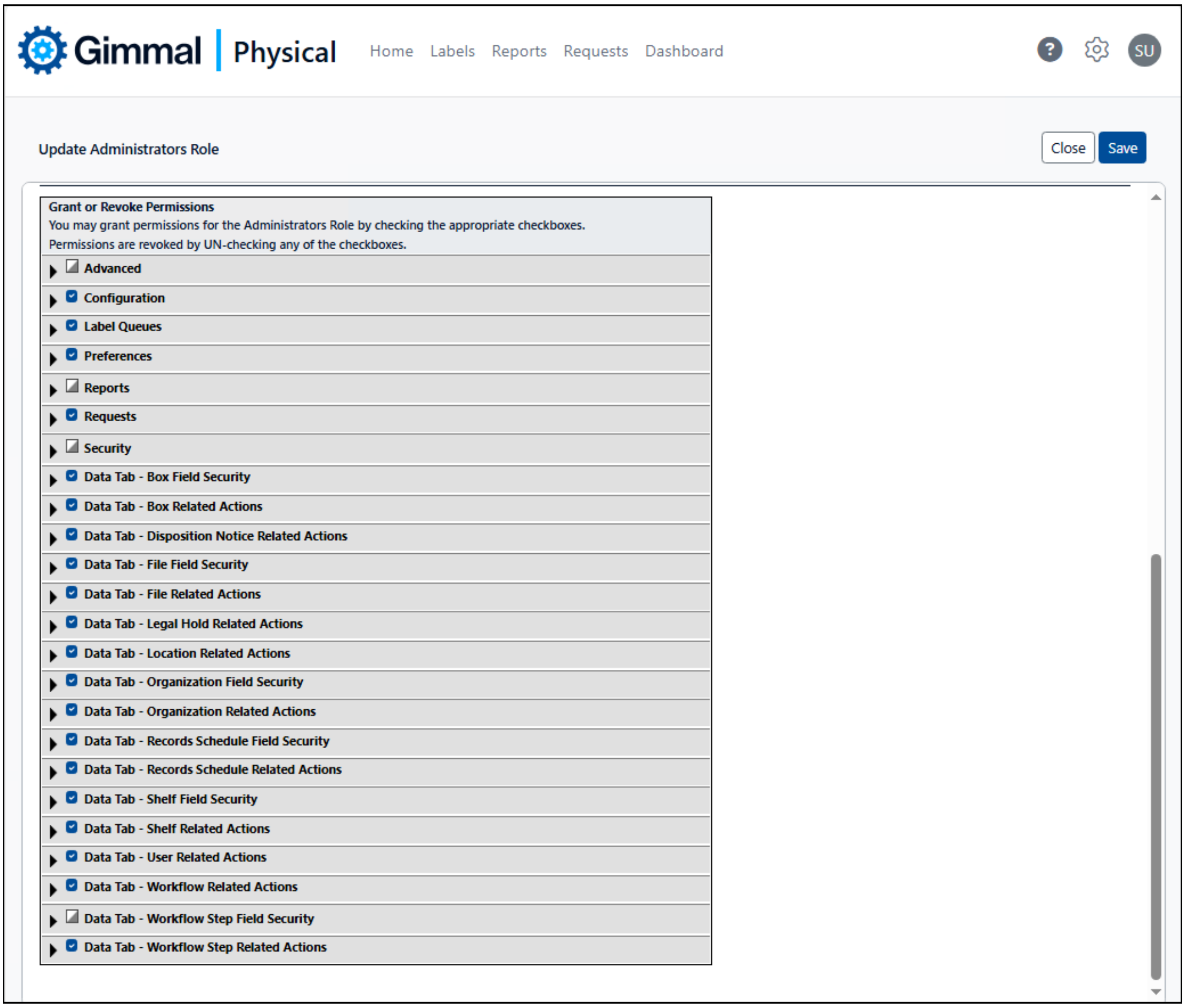
1.5.1.1 Overview

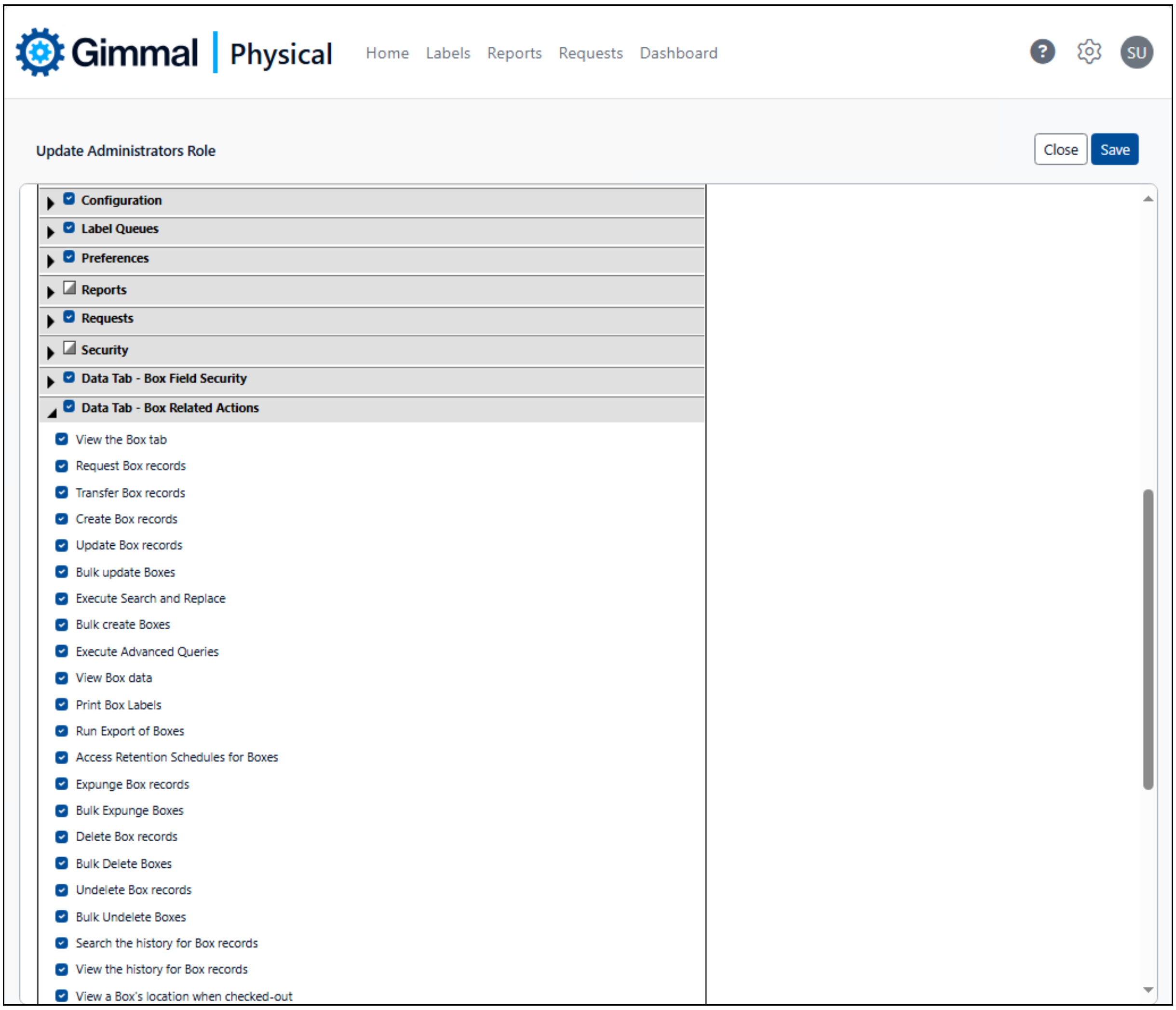
Gimmal Physical security primarily implements a role-based model supporting either forms or single-sign-on for authentication like that found within Windows Active Directory or Active Directory Federated Services. An unlimited number of roles are supported.

The model itself consists of two halves, the first restricting data access, and the second is application functionality.

Security roles and their associated privileges are managed from within the Gimmal Physical module, sample screenshots of which are shown below.

31. https://gimmal.navattic.com/1u20k7y


Gimmal | Physical
Home
Labels
Reports
Requests
Dashboard
SU
Update Administrators Role
Close
Save
Grant or Revoke Permissions
You may grant permissions for the Administrators Role by checking the appropriate checkboxes.
Permissions are revoked by UN-checking any of the checkboxes.
Advanced
Configuration
Label Queues
Preferences
Reports
Requests
Security
Data Tab - Box Field Security
Data Tab - Box Related Actions
Data Tab - Disposition Notice Related Actions
Data Tab - File Field Security
Data Tab - File Related Actions
Data Tab - Legal Hold Related Actions
Data Tab - Location Related Actions
Data Tab - Organization Field Security
Data Tab - Organization Related Actions
Data Tab - Records Schedule Field Security
Data Tab - Records Schedule Related Actions
Data Tab - Shelf Field Security
Data Tab - Shelf Related Actions
Data Tab - User Related Actions
Data Tab - Workflow Related Actions
Data Tab - Workflow Step Field Security
Data Tab - Workflow Step Related Actions



1.5.1.2 Authentication

The Gimmal Physical application may be accessed via either Forms or Single Sign On. Configuration of the authentication mode is managed within the application's corresponding web.config file.

When under Forms authentication, all security credentials are managed within the Gimmal Physical application itself, including Username and Password. Gimmal Physical supports the standard suite of password complexity rules including password length, types of characters required, lifespan, and number of failures until lockout.

When running on-premises against Active Directory (using Integrated Windows Authentication), each time a Gimmal Physical user attempts to access the Gimmal Physical application via the client-specific url, their network domain-specific User ID is used to query Active Directory to determine which, if any, Gimmal Physical -specific domain groups they belong to.

Gimmal Physical makes this determination based upon a textual comparison of Gimmal Physical roles defined within the Gimmal Physical application compared to role names defined with the network domain (e.g. 'Gimmal -administrator' or 'Gimmal Physical -Records Officer'). Outcomes include:

1. If no Gimmal Physical specific domain group memberships are identified, the user is denied access to the application.
2. If a Gimmal Physical specific domain group membership is identified, Gimmal Physical checks for the existence of an internal Gimmal Physical user record.
   a. If one is found, Gimmal Physical updates that record with any changes found from linked Active Directory fields.
   b. If one is not found, Gimmal Physical creates the internal Gimmal Physical user record, populating it with any linked Active Directory fields.
3. If more than one Gimmal Physical specific domain group membership is identified, Gimmal Physical selects the first it finds and processes authentication via #2 above.

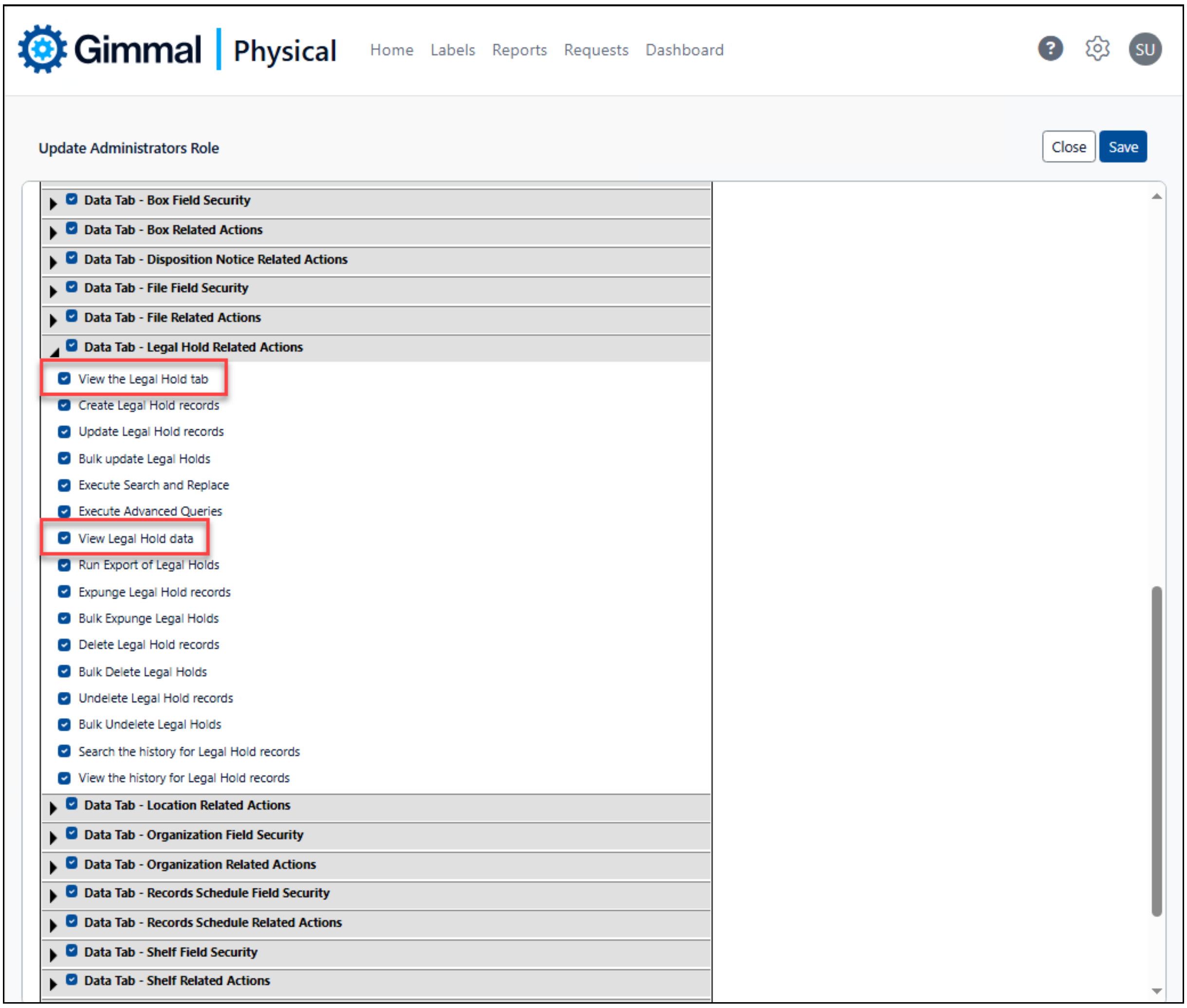
When using Single Sign On with a SAMLv2 Identity Provider (such as OKTA, ADFS, or AAD), Gimmal Physical will authenticate the user based on the assertion sent by the IdP. Gimmal Physical can be configured to recognize a specific claim as username information and will find/create the user record in Gimmal Physical based on that information. Gimmal Physical can also assign the user to a role and configure other metadata based on the claims sent in the assertion.

1.5.1.3 Data Security

Gimmal Physical data security may be configured at table, row, or column levels.

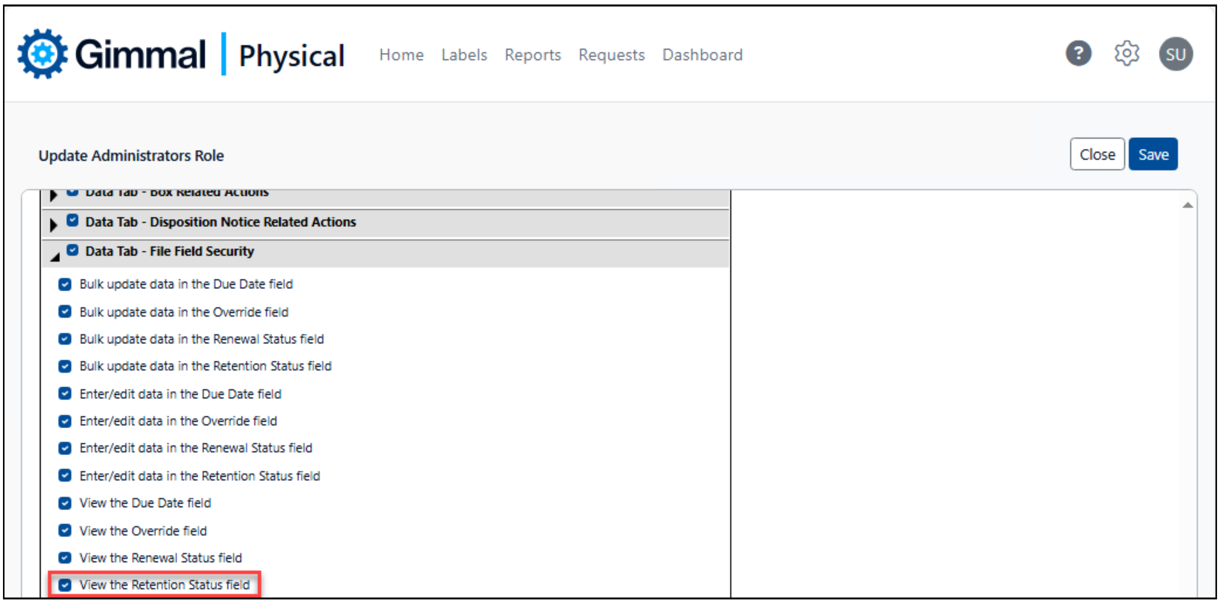
1.5.1.3.1 Table Level Security

Table level security corresponds to individual data tab within Gimmal Physical, allowing or preventing access to those screens. Table level security is managed via simple checkbox driven logic within the security module as shown below. A common example is granting or denying access to the Holds tab.



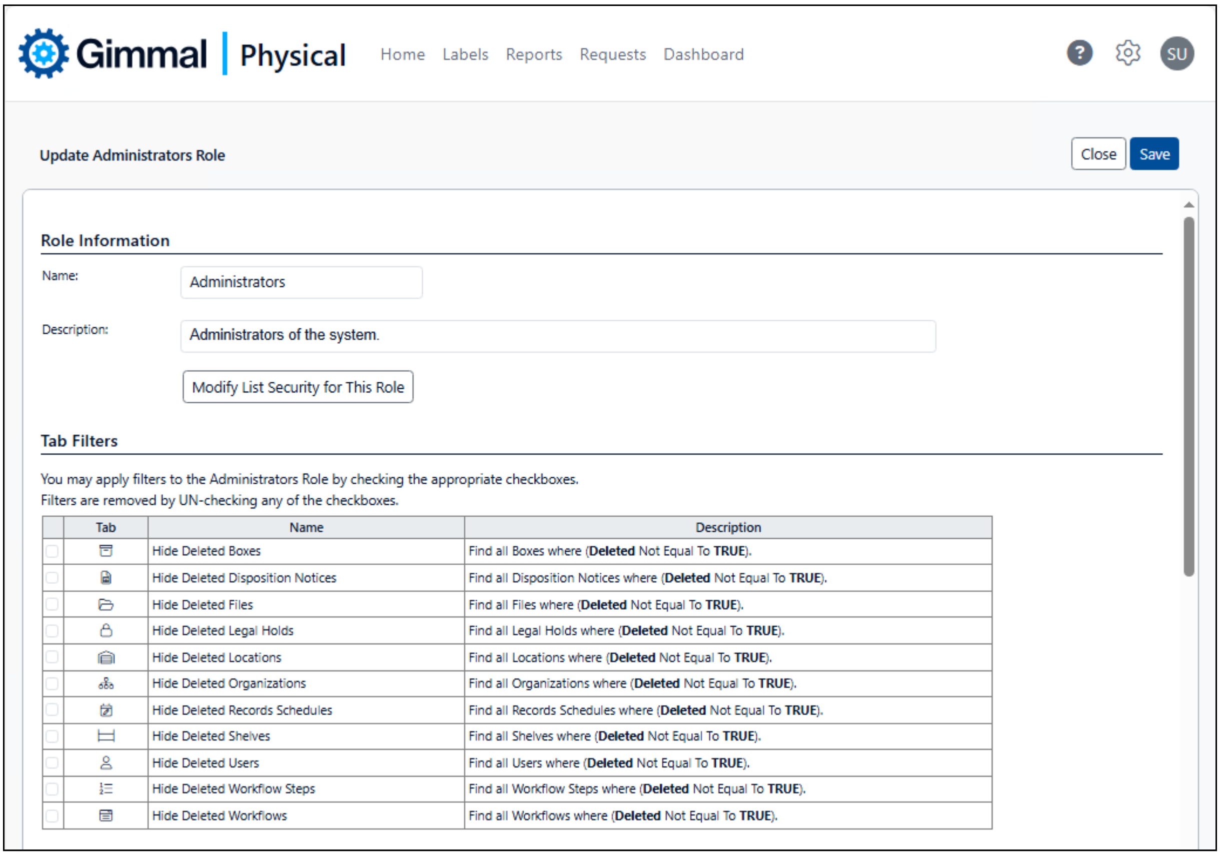
1.5.1.3.2 Column Level Security

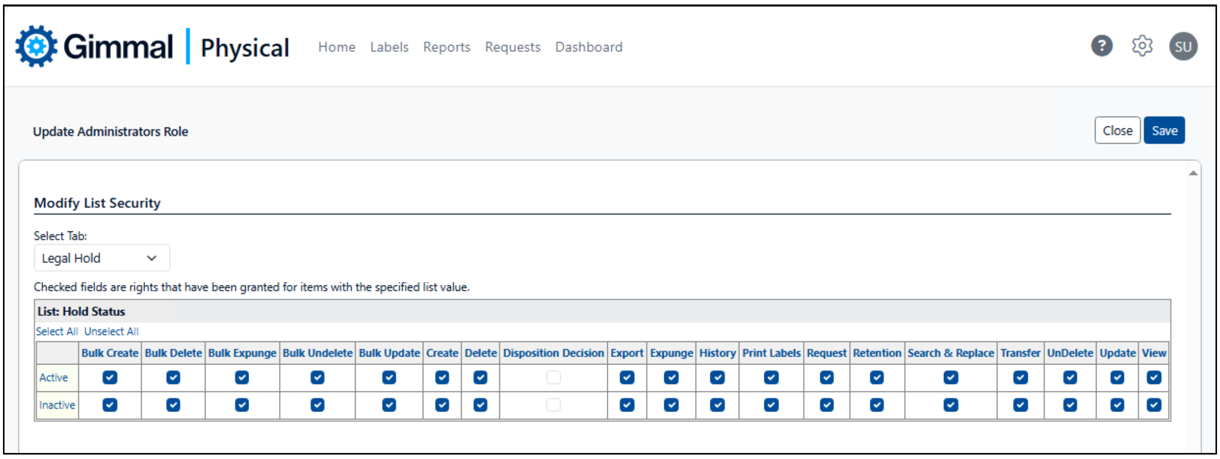
Column level security provides the ability to hide individual data elements. Column level security is managed via simple checkbox driven logic within the security module as shown below. A common example might be to hide the Override field for Boxes or Files.



1.5.1.3.3 Row Level Security

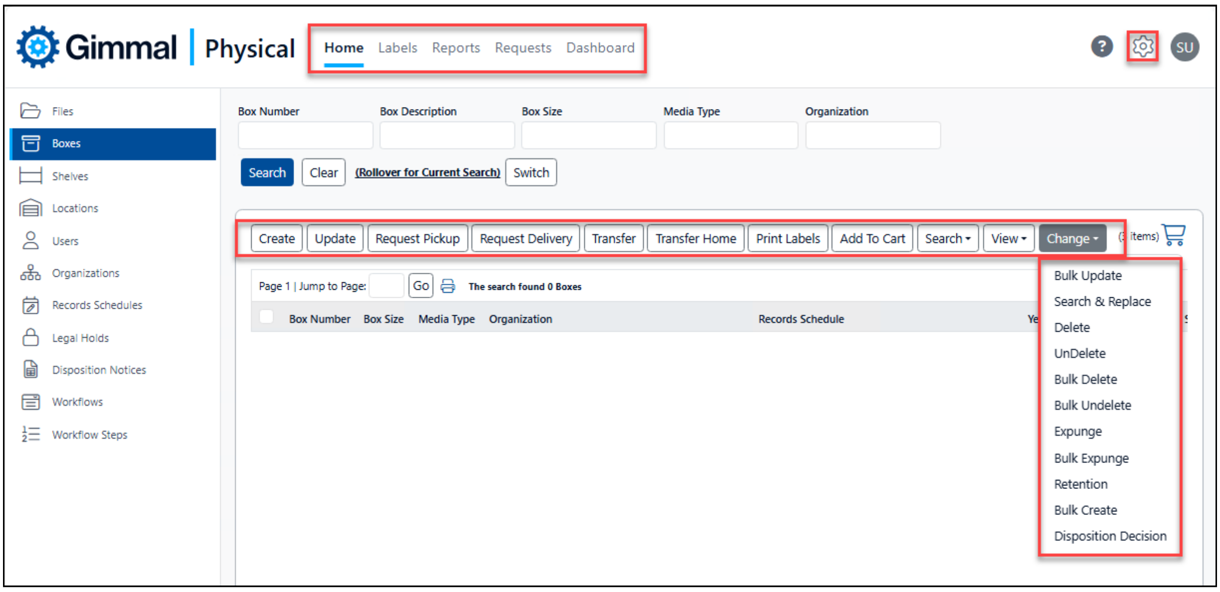
Row level security provides the ability to restrict users to those data records specific to them. Row level security may be implemented via Tab Filters, Secured Lists, or User-level meta-data, an example of each shown below.





1.5.1.4 Functional Security

Gimmal Physical functional security provides the ability to grant or deny access to virtually every functional capability within the software, corresponding to the application ribbon and action menus displayed below.



1.5.2 Technical Specifications – Cloud

1.5.2.1 Contents

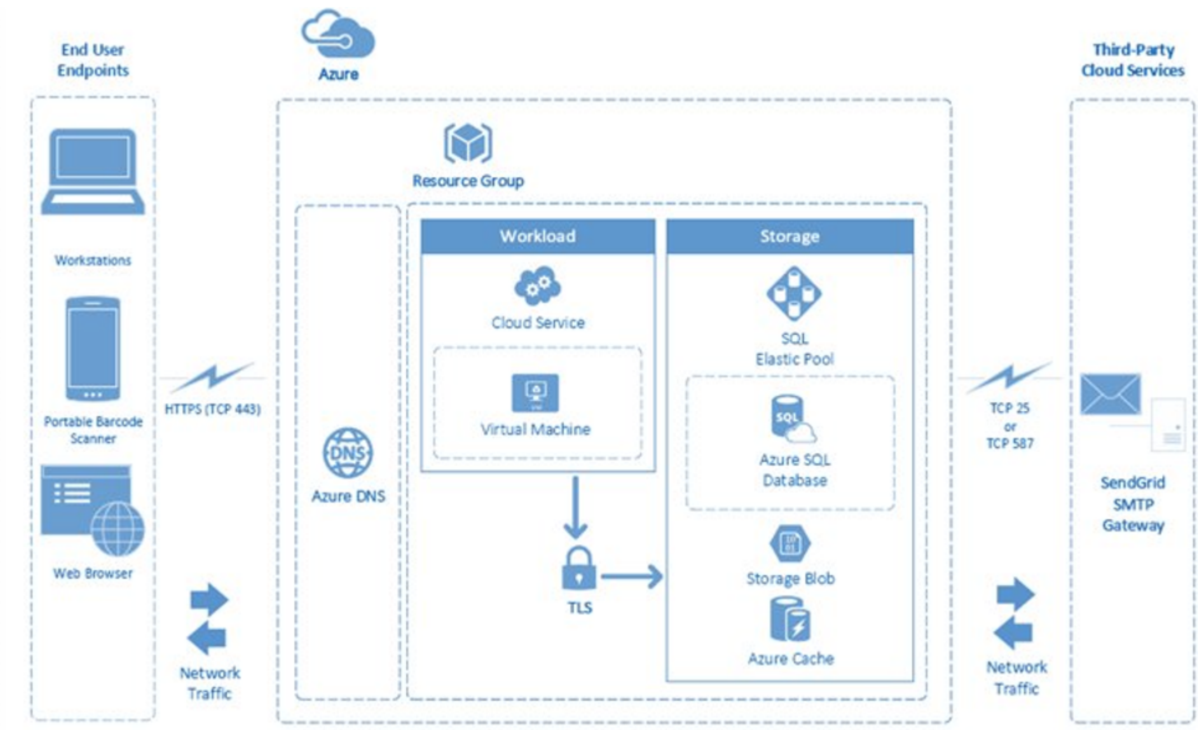
1.5.2.2 Introduction

Gimmal Physical is a web-based application that is offered as either a cloud-based or on-premises solution. The technical specifications in this document for the following sections are **specific to cloud installations**.

The Gimmal Physical web application and data will be stored on the Microsoft cloud computing platform known as Azure. Azure is a top-rated cloud provider with 99.9% uptime and is responsible for cloud security, data backup, and cloud uptime and availability. This arrangement gives you all the features provided in Gimmal, combined with the security resources provided by Microsoft Azure.

1.5.2.3 Application Architecture

By architecture design, the Gimmal Physical web application and database run fully on Azure, where each solution is isolated by the customer, with no multitenancy, and no shared resources other than the Azure platform.



1.5.2.4 Application Architecture Components

Gimmal Physical application architecture includes the following components.

1. Azure DNS to resolve CNAME mapping to a dedicated Azure Cloud Service URL.
2. Azure Resource Group groups the following components per client.
    a. Azure Cloud Service, which runs a dedicated virtual machine hosting the Gimmal Physical web application. Cloud Service connections to all other components within Azure leverage TLS for a secure, encrypted connection.
    b. Azure SQL Elastic Pool or Azure SQL Database, depending on the client data load, the client database will be hosted either on a dedicated SQL Elastic Pool or SQL Database.

c. Azure Storage Blob stores all electronic files created by the Gimmal Physical web application. The Digital Content module relies on the Storage Blob to store electronic records.
d. Azure Cache (Redis Cache) is used for session management and cache scenarios to improve performance within the Gimmal Physical web application.

3. SendGrid SMTP Gateway is used to send transactional emails from the Gimmal Physical web application. Connection to the SMTP gateway can be either through port TCP 25 (unencrypted) or port TCP 587 (encrypted via TLS).

1.5.2.5 Data Centers

Gimmal Physical utilizes the following Azure data centers: East US, Canada Central, and US Gov Virginia.

1.5.2.6 Security

1.5.2.6.1 Service Organization Controls Standards

Microsoft cloud services are audited at least annually against the SOC reporting framework by independent third-party auditors. The audit for Microsoft cloud services covers controls for data security, availability, processing integrity, and confidentiality as applicable to in-scope trust principles for each service. Microsoft has achieved SOC 1 Type 2, SOC 2 Type 2, and SOC 3 reports.

1.5.2.6.2 Certificates

Secure Sockets Layer (SSL) and Code Signing certificates are provided and managed by the client with assistance provided by the Gimmal System Engineer Team.

1.5.2.6.3 Information Protection and Encryption

- **Transport Layer Security TLS (Encryption-in-transit)**
  SQL Database secures customer data by encrypting data in motion with Transport Layer Security. SQL Server enforces encryption (SSL/TLS) at all times for all connections. This ensures all data is encrypted "in transit" between the client and the server.
- **Transparent Data Encryption (Encryption-at-rest)**

  Transparent Data Encryption (TDE) for Azure SQL Database adds a layer of security to help protect data at rest from unauthorized or offline access to raw files or backups. Common scenarios include data center theft or unsecured disposal of hardware or media, such as disk drives and backup tapes. TDE encrypts the entire database using an AES encryption algorithm, which doesn’t require application developers to make any changes to existing applications.
  In Azure, all newly created SQL databases are encrypted by default, and the database encryption key is protected by a built-in server certificate. Certificate maintenance and rotation are managed by the service and require no input from the user.

1.5.2.6.4 Identity Management Integration and Single Sign On (SSO)

Gimmal Physical can integrate with the following Identity Management/Single Sign On (SSO) technologies:

- Okta
- Azure Active Directory (AD)
- Microsoft Active Directory Federation Services (ADFS)
- SAML2-based Identity Providers (IdP)

1.5.2.6.5 Vulnerability Scans

Gimmal Physical performs vulnerability scans monthly and performs a scan for every new client build.

1.5.2.7 Disaster Recovery

Gimmal provides robust backup and disaster recovery based on Microsoft Azure SQL Database, including Recovery Point Objective (RPO < 24 hours), Recovery Time Objective (RTO < 12 hours), and Point In Time Restore (PITR backup retained for 14 days).

1.5.2.8 Patch Management

System maintenance, outside of application bug fixes/patches, is provided by the Microsoft Azure platform. Patches applied to the Gimmal Physical web application are governed by the Gimmal Change Management process.

1.5.2.9 Installation Components

Component	Description	Deployment Unit
Gimmal Physical Web Access	Software to access the Gimmal Physical application.	Modern Web Browser
Gimmal ScannerConnect (optional)	A standalone application that provides an interface for the Zebra DS4608/4278 barcode scanners.	Client Workstation
Email Notifications	Software to send email messages from the Gimmal Physical application.	SendGrid

Gimmal PortableConnect (optional)	A standalone application that provides an interface for the Zebra TC5x barcode scanner. Supports Android OS versions 13 and 14	Client Mobile Scanner

1.5.2.10 Additional Supporting Applications

1.5.2.10.1 Optional Software:

- **Gimmal FileConnect** (see page 147): a Windows service that interfaces with Gimmal Physical web services to push data from network file shares or local folders to Gimmal Physical for storage. A UI is provided to configure the service.
- **Gimmal ScannerConnect** (see page 174): a standalone application that allows users to transfer items in Gimmal Physical. Used for tethered or wireless scanner devices.
- **Gimmal PortableConnect** (see page 151): An Android application that allows most Zebra TC5x barcode scanners to collect scans and perform transfers into Gimmal Physical. Supports Android 113 and 14.

1.5.2.10.2 Gimmal Physical REST API

An extensive library (see page 228)of REST-based web services is available for consumption. Please

1.5.2.11 Device Hardware

Supported Devices:

Device	Description	Specifications
Zebra TC5x (Mobile Scanner) (not including TC51 or its variants)	This scanner is often used in a warehouse, office building, or campus environment to both check in and out items, as well as reconcile the Gimmal Physical database with where items are located. Uses the Gimmal PortableConnect application to interface with Gimmal Physical.	• USB port for the dock • Android OS versions 13 and 14 • Gimmal PortableConnect application (see page 151)

Zebra LI4278 (Wireless Scanner)	A quick way to check in and out items using the Gimmal ScannerConnect application. Normally used at a file room checkpoint. The base is connected to the computer, and the scanner has a limited range.	• USB port • Direct-to-Serial cable for the scanner, with a COM-to-USB adapter • Driver for the adapter; PC to recognize the scanner as a COM port connection • 80-foot range • Gimmal ScannerConnect application (see page 174)
Zebra DS4608 (Tethered Scanner)	A quick way to check in and out items within the Gimmal ScannerConnect application, normally used at a file room checkpoint.	• USB port • Direct-to-Serial cable for the scanner, with a COM-to-USB adapter • Driver for the adapter; PC recognizes the scanner as a COM port connection • 6ft range tethered scanner • Gimmal ScannerConnect application (see page 174)

1.5.3 Technical Specifications – On-Premises

1.5.3.1 Introduction

Gimmal Physical is a true thin application that is offered as either a cloud-based or on-premises solution. The system requirements in this article are specific to on-premises installations only.

1.5.3.2 Requirements

This document provides the list of requirements for supported operating systems, database servers, software, and hardware.

Gimmal Physical is deployed with two installation files:

- A setup file to install the application on the web server
- A backup file for the SQL Server database

Please see the Installation Guide for more details.

1.5.3.2.1 Application Server

Microsoft® .NET Framework 4.8 must be installed on the application server running Gimmal Physical. A supported version of Microsoft Internet Information Services (IIS) 7.0 or later must be configured and running before Gimmal Physical can be installed.

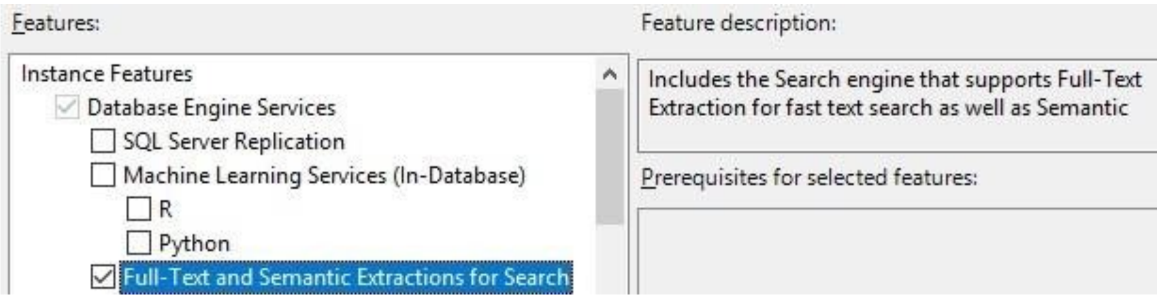
1.5.3.2.2 Databases Supported

Recommended: 3.13 and above should use SQL Server 2019 or above.

Supported Software	Edition	Product Version Minimum
SQL Server 2012	Standard Enterprise	Version 11.x Note: Not supported for 3.12+
SQL Server 2014	Standard Enterprise	Version 12.x Note: Not supported for 3.12+
SQL Server 2016	Standard Enterprise	Version 13.x
SQL Server 2017	Standard Enterprise	Version 14.x
SQL Server 2019	Standard Enterprise	Version 15.x
SQL Server 2022	Standard Enterprise	

1.5.3.2.3 Database Feature Requirements

Full-text and Semantic Extractions for Search are required.



1.5.3.2.4 Devices (Optional)

- Zebra DS4608/4278 or any general-purpose scanner.
  - Gimmal Physical ScannerConnect (see page 174)must be installed and enabled to use tethered or wireless barcode scanner devices with Gimmal Physical.
- Zebra TC5x Mobile Computer: Gimmal Physical PortableConnect (see page 151) must be installed and enabled on the TC5x device.

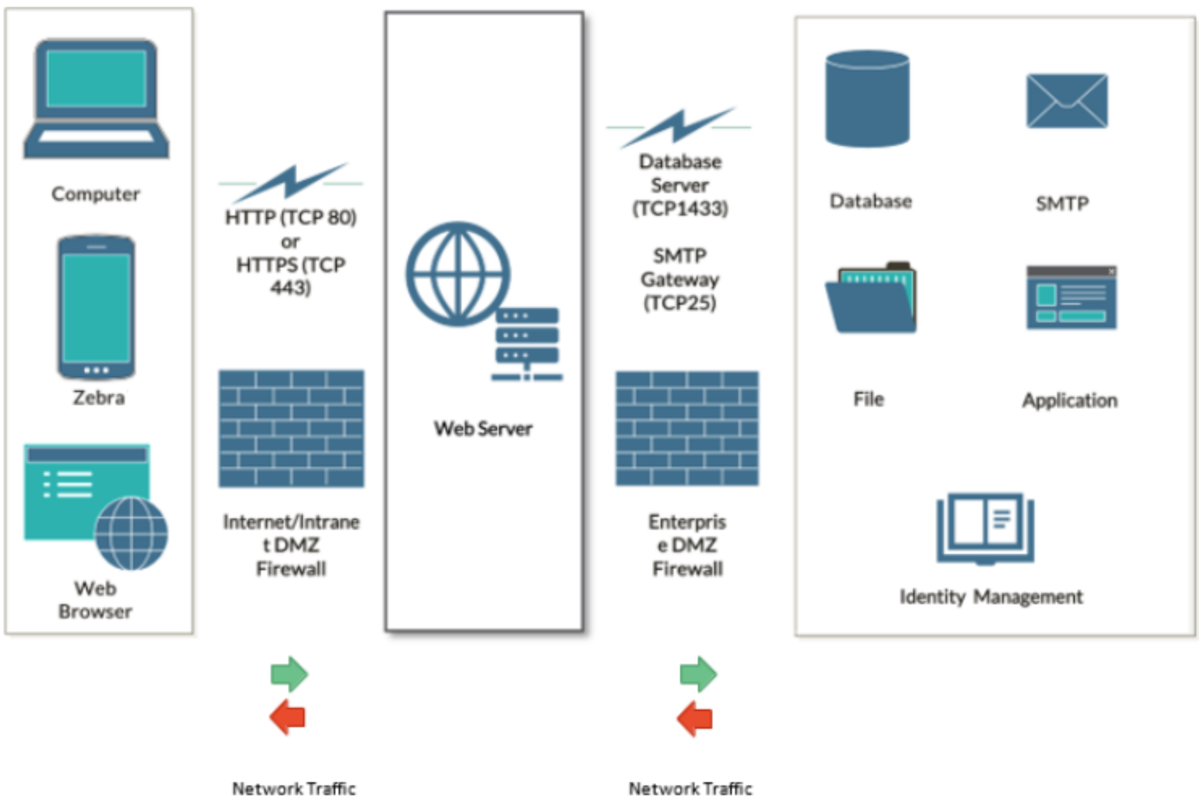
- Android OS 13 and 14 are supported
- TC-51 and its variants are no longer supported

1.5.3.2.5 SMTP Server

To use the e-mail notification feature, there must be an SMTP (Simple Mail Transport Protocol) server available to handle the actual mail requests for the organization. For example, Microsoft Exchange Server provides SMTP facilities for sending email messages, as do Sendmail, Postfix, QMail, and other products.

1.5.3.3 Application Architecture

Typical on-premises Gimmal Physical architecture is depicted below.



1.5.3.4 Installation Components

Component	Description	Deployment Unit
Gimmal Physical Web Access	Software to access the Gimmal Physical application.	Modern Web Browser
Gimmal ScannerConnect (optional)	A standalone application that provides an interface for the tethered Zebra DS4608/4278 or any general-purpose barcode scanners.	Client Workstation
Gimmal PortableConnect (optional)	A standalone application that provides an interface for the mobile Zebra TC52 barcode scanner. Supports Android OS 13 and 14.	Client Mobile Scanner

1.5.3.5 Operating Systems

Gimmal Physical requires Microsoft Windows 2016 64-bit or later running on a physical or virtual computer.

1.5.3.6 Additional Supporting Applications

1.5.3.6.1 Optional Software

- Gimmal Physical FileConnect (see page 147): a Windows service that interfaces with the Gimmal Physical web service to push data from network file shares or local folders to the Gimmal Physical for storage. A UI is provided to configure the service.
- Gimmal Physical ScannerConnect: (see page 174) a standalone application that allows users to transfer items in Gimmal Physical. Used for tethered or wireless scanner devices.
- Gimmal Physical PortableConnect (see page 151): An Android application that allows most Zebra TC5x barcode scanners to collect scans and perform transfers into Gimmal Physical. Supports Android 13 and 14.

1.5.3.6.2 Identity Management Integration and Single Sign On (SSO)

Gimmal Physical can integrate with the following Single Sign On (SSO) technologies:

- Okta
- Azure Active Directory (AD)
- Microsoft Active Directory Federation Services (ADFS)

- SAML2-based Identity Providers (IdP)

1.5.3.6.3 Gimmal Physical REST API

An extensive library of REST-based web services is available for consumption.

1.5.3.7 Windows Hardware

Please note: These are MINIMUM requirements. The more resources, the better the system will perform.

Hardware	Deployment Unit	Minimum Requirement
Hard Disk and Memory *	Web Server	8 GB free disk space 16 GB RAM
	Database Server	16 GB free disk space 16 GB RAM
	Job Services Server	8 GB free disk space 16 GB RAM
Client Workstation	Client Workstation	• Modern web browser • The optional barcode scanner device requires an available COM/USB port

* Ideal Hard Disk and Memory allotments should reflect the volume of records and frequency of transactions. For large installations, we highly recommend benchmarking in your environment to pinpoint the ideal specifications.

1.5.3.8 Device Hardware

Supported Devices

Device	Description	Specifications
Zebra TC5x (Mobile Scanner) (not including TC51 or its variants)	This scanner is often used in a warehouse, office building, or campus environment to both check-in and out items, as well as reconcile the Gimmal Physical database with where items actually are located.	• USB port for the dock • Android OS versions 13 or 14 • Gimmal PortableConnect application (see page 151)

Zebra LI4278 or any general-purpose scanner (Wireless Scanner)	A quick way to check in and out items within the Gimmal ScannerConnect application. Normally used at a file room checkpoint. The base is connected to the computer and the scanner has a limited range.	• USB port • Direct-to-Serial cable for the scanner, with a COM-to-USB adapter • Driver for the adapter; PC to recognize the scanner as a COM port connection • 80-foot range • Gimmal ScannerConnect application (see page 174)
Zebra DS4608 or any general-purpose scanner (Tethered Scanner)	A quick way to check in and out items within the ScannerConnect application, normally used at a file room checkpoint.	• USB port • Direct-to-Serial cable for the scanner, with a COM-to-USB adapter • Driver for the adapter; allows the PC to recognize the scanner as a COM port connection • 6ft range tethered scanner • Gimmal ScannerConnect application (see page 174)

1.5.4 Gimmal Physical REST Services Technical Guide

1.5.4.1 Before You Begin

1.5.4.1.1 Setting up Rest API

You will need the correct URLs for accessing Gimmal Physical. For Gimmal Cloud hosted Gimmal Physical, these values resemble the following:

- Application URL: https://<hostname>.gimmal.com/
- REST Web Service URL: https://<hostname>-services.gimmal.com

Please use the test options below to validate yrou connections.

1.5.4.1.2 Swagger

After confirming that the REST service is up and running, the 'Swagger' page, https://<hostname>-services.gimmal.com/swagger, can be used to show the different methods that are available in the REST service. This page can be accessed without being authenticated.

Warning. The **Try it out!** is available for each method on the 'Swagger' page and will execute the method, as configured. However, using the **Try it out!** option will execute the API method against your application and may result in unexpected changes to your data/content.

1.5.4.1.3 Code Snippet Format

The code snippets contained in this document call the following SetHeaders method. To use it, replace [USERNAME] and [PASSWORD] with the username and password of the account you are using to access the web service.

Note: Infolinx is the former name for Gimmal Physical and can be found in certain methods and documentation.

Sample Code

```
void SetHeaders(HttpWebRequest webRequest, string method, string body)
{
  webRequest.Method = method;
  webRequest.Credentials = new NetworkCredential("[USERNAME] ", "[PASSWORD]");
  webRequest.PreAuthenticate = true;
  webRequest.AllowWriteStreamBuffering = true;
  if (method == "POST" || method == "PUT")
  {
    webRequest.ContentType = "application/json";
    webRequest.ContentLength = body.Length;
    try
    {
      StreamWriter sw = new StreamWriter(webRequest.GetRequestStream());
      sw.Write(body);
      sw.Close();
    }
    catch (Exception ex){}
  }
}
```

1.5.4.2 Action

1.5.4.3 To define Actions available for a given Tab ID

Request Type	URL
GET	http://[ServerName]:[Port ID]/api/Action/[ID]

Implementation Notes

Get a list of possible Actions that can be performed for a Tab

Accepts Inputs

Integer with the value of the Tab's ID

Input Parameter Type

URL

Returns

An IEnumerable<IRAction> object with fields described in Response Class below

Response Content Type

Application/json

Response Class

IRAction

Property	Type	Description
action	String (optional)	Name of the action.
caption	String (optional)	Human readable caption for this action.
urlCommand	String (optional)	Used to specify the update command from the phone.
postObject	String (optional)	Object to include as post thing.
associatedTabId	Integer (optional)	Tab id if needed for this action.
associatedTabName	String (optional)	Tab name if needed for this action.
associatedColumnName	String (optional)	Column name if needed for this action.

Sample Code

```
public partial class IRAction
{
  public virtual String Action { get; set; }
  public virtual String Caption { get; set; }
  public virtual String UrlCommand { get; set; }
  public virtual String PostObject { get; set; }
  public virtual Int32 AssociatedTabId { get; set; }
  public virtual String AssociatedTabName { get; set; }
  public virtual String AssociatedColumnName { get; set; }
}

public IEnumerable<IRAction> GetActions()
{
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/Action/201");
  SetHeaders(webRequest, "GET", null);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  IEnumerable<IRAction> objActions =
JsonConvert.DeserializeObject<IEnumerable<IRAction>>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  return objActions;
}
```

1.5.4.4 Data Dictionary

1.5.4.4.1 To get Data Dictionary Fields for a Tab

Request Type	URL
POST	http://[Servername]:[Port ID]/api/Dictionary

Implementation Notes

Returns an IRDictionary object containing Captions and Column Names of the given Tab ID from Gimmal's Data Dictionary.

Accepts Inputs

- Integer with the value of the applicable Tab ID
- String containing a SpecialSearch query. This must currently always be set to "quicksearch"

Input Parameter Type

Application/json body

Input Parameter Class

IRDictionarySearch

Property	Type	Description
tabId	Integer (required)	Item type to grab dictionary fields for.
specialSearch	String (required)	Special queries; must be set to “quicksearch”.

Returns

An IEnumerable<IRDictionary> object with fields described in Response Class below

Response Content Type

Application/json

Response Class

IRDictionary

Property	Type	Description
caption	String (optional)	Caption for field.
columnName	String (optional)	Column name for field.

Sample Code

```
public partial class IRDictionarySearch
{
  public virtual Int32 TabId { get; set; }
  public virtual String SpecialSearch { get; set; }
}

public partial class IRDictionary
{
  public virtual String Caption { get; set; }
  public virtual String ColumnName { get; set; }
}

public IEnumerable<IRDictionary> GetIRDictionary()
```

```
{
  // w is a string containing the http://[Servername]:[Port ID] part of the URL
  IRDictionarySearch Srch = new IRDictionarySearch();
  Srch.TabId = 201;
  Srch.SpecialSearch = "quicksearch";
  string body = JsonConvert.SerializeObject(Srch);
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/Dictionary");
  SetHeaders(webRequest, "POST", body);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  IEnumerable<IRDictionary> objDictionary =
JsonConvert.DeserializeObject<IEnumerable<IRDictionary>>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  webResponse = null;
  return objDictionary;
}
```

1.5.4.5 Item

1.5.4.5.1 Create/Update an Item

Request Type	URL
POST	http://[Servername]:[Port ID]/api/Item

Implementation Notes

Update/Create an Item.

When creating, you must provide an IRColumn array entry for each field that is required in the Item table for that Tab, with at least IRColumn.ColumnName and IRColumn.Value provided for each.

For updating you must provide an Item ID as a new entry in the IRColumn array input (not in the IRItem.id) or else a new Item will be created. **Note:** user must have rights within Gimmal Physial to modify the Item or the update will fail.

Accepts Inputs

An IRItem with an array of IRColumns embedded in it; see Input Parameter Format below

Input Parameter Type

Application/json body

Input Parameter Format

- IRItem

Property	Type	Description
columns	Array[IRColumn] (Optional)	Columns, corresponds to view.
tabSingularName	String (optional)	singular name for item's tab
edocFile	String (optional)	Base64 encoded string of the edoc file. If creating, must provide a column value for I_E_USER_FILE_NAME
contentType	String (optional)	content type for uploading edoc file
Id	Integer (optional)	ID of item.
quickDescription	String (optional)	Quick Description
barcode	String (optional)	Barcode
tabId	Integer (optional)	ID of tab.

- IRColumn

Property	Type	Description
columnName	String (optional)	Name of column.
caption	String (optional)	Caption of column.
value	String (optional)	Value of column.
type	String (optional)	Data type of column.

Returns

• An IRItemResultList object with a Message, Result, and array of IRItemResult fields described in Response Class below

Response Content Type

Application/json

Response Class

- IRItemResultList

Property	Type	Description
message	String (optional)	Overall result string for the list.
result	Boolean (optional)	False if any failed.
itemResults	Array[IRItemResult] (Optional)	The list of individual item results.

- IRItemResult

Property	Type	Description
locationBarcode	String (optional)	Location barcode if applicable for the action.
locationDescription	String (optional)	Location QD if applicable for the action.
itemId	Integer (optional)	ID of item.
itemBarcode	String (optional)	Barcode of item.
itemDescription	String (optional)	Quick Description of item.
requestId	Integer (optional)	ID of Request (if this was a request).
result	Boolean (optional)	Successful or not.
reason	Integer (optional)	Corresponds to some enum for hardcoded results.
message	String (optional)	May contain additional info about why this failed.

Sample Code

```
// ******************************************
// * Item - Create/Update an Item
// ******************************************

public partial class IRItem
{
  public virtual List<IRColumn> columns { get; set; }
  public virtual String TabSingularName { get; set; }
  public virtual String EdocFile { get; set; }
  public virtual String ContentType { get; set; }
  public virtual Int32 Id { get; set; }
  public virtual String QuickDescription { get; set; }
  public virtual String Barcode { get; set; }
  public virtual Int32 TabId { get; set; }
}

public partial class IRColumn
{
  public virtual String ColumnName { get; set; }
  public virtual String Caption { get; set; }
  public virtual String Value { get; set; }
  public virtual String Type { get; set; }
}

public partial class IRItemResultList
{
  public virtual String Message { get; set; }
  public virtual bool Result { get; set; }
  public virtual IRItemResult[] ItemResults { get; set; }
}

public partial class IRItemResult
{
  public virtual String LocationBarcode { get; set; }
  public virtual String LocationDescription { get; set; }
  public virtual Int32 ItemId { get; set; }
  public virtual String ItemBarcode { get; set; }
  public virtual String ItemDescription { get; set; }
  public virtual Int32 RequestId { get; set; }
  public virtual bool Result { get; set; }
  public virtual Int32 Reason { get; set; }
  public virtual String Message { get; set; }
}

public IRItemResultList CreateUpdateItem()
{
  // w is a string containing the http://[Servername]:[Port ID] part of the URL
  // IRColumns -- To create a new Item, you must provide at a minimum an IRColumn

  object
  // for each of that Item's requred fields for that Gimmal implementation,
  // though additional Item fields are allowed. The following three fields were

  required for
```

```
  // the Gimmal implementation that was used to create the sample code;
  // the fields required for your implementation will be different

  IRColumn IRC0 = new IRColumn();
  IRC0.ColumnName = "FK_ITEM_ORGANIZATION_ID";
  // IRC.Caption = "";
  IRC0.Value = "501";
  // IRC.Type = "";
  IRColumn IRC1 = new IRColumn();
  IRC1.ColumnName = "CONTENTS_RANGE___DATE";
  IRC1.Value = "1/1/2014-2/2/2015";
  IRColumn IRC2 = new IRColumn();
  IRC2.ColumnName = "I_IT_ID";
  IRC2.Value = "202";

  // Updating an existing Item requires adding the following 3 lines substituting the
Item's ID for the "303" value
  // Failure to specify an Item ID will result in the creation of a new Item
  // IRColumn IRC3 = new IRColumn();
  // IRC3.ColumnName = "I_ID";
  // IRC3.Value = "303";

  IRItem IRI = new IRItem();
  IRI.columns = new List<IRColumn> { }
  IRI.columns.Add(IRC0);
  IRI.columns.Add(IRC1);
  IRI.columns.Add(IRC2);

  // IRI.columns.Add(IRC3);
  // Alternative shorthand method:
  // IRI.columns = new List<IRColumn> {
  // new IRColumn { ColumnName="FK_ITEM_ORGANIZATION_ID", Value="302"},
  // new IRColumn { ColumnName="CONTENTS_RANGE___DATE", Value="1/1/2014-1/1/2015"},
  // new IRColumn { ColumnName="I_IT_ID", Value="202"}
  // };

  List<IRItem> iList = new List<IRItem>();
  iList.Add(IRI);
  string body = JsonConvert.SerializeObject(iList);
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/Item");
  SetHeaders(webRequest, "POST", body);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  IRItemResultList objNewItem =
JsonConvert.DeserializeObject<IRItemResultList>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  webResponse = null;
  return objNewItem;
}
```

1.5.4.5.2 Delete an Item by its ID

Request Type	URL
DELETE	http://[Servername]:[Port ID]/api/Item/[ID]

Implementation Notes

Deletes the Item that corresponds to the supplied Item ID

Accepts Inputs

• Integer Item ID

Input Parameter Type

URL

Returns

• An IRItemResult object with fields described in Response Class below

Response Content Type

Application/json

Response Class

IRItemResult

Property	Type	Description
locationBarcode	String (optional)	Location barcode if applicable for the action.
locationDescription	String (optional)	Location QD if applicable for the action.
itemId	Integer (optional)	ID of item.
itemBarcode	String (optional)	Barcode of item.

Property	Type	Description
itemDescription	String (optional)	QuickDescription of item.
requestId	Integer (optional)	ID of request (if this was a request).
result	Boolean (optional)	Successful or not.
reason	Integer (optional)	Corresponds to some enum for harcoded results.
message	String (optional)	May contain some extra info about why this failed.

Sample Code

```
// **************************************************************
// * Item - Delete an Item
// * Sets column I_Deleted to true in the Item’s database table
// **************************************************************

// w is a string containing the http://[Servername]:[Port ID] part of the URL
// 1203 is the ID of the Box to be deleted
// objItemResult.Result will be true if successful

public partial class IRItemResult
{
  public virtual String LocationBarcode { get; set; }
  public virtual String LocationDescription { get; set; }
  public virtual Int32 ItemId { get; set; }
  public virtual String ItemBarcode { get; set; }
  public virtual String ItemDescription { get; set; }
  public virtual Int32 RequestId { get; set; }
  public virtual bool Result { get; set; }
  public virtual Int32 Reason { get; set; }
  public virtual String Message { get; set; }
}

public IRItemResult DeleteItem()
{
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/Item/1203");
  SetHeaders(webRequest, "DELETE", null);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  IRItemResult objItemResult =
JsonConvert.DeserializeObject<IRItemResult>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  return objItemResult;
```

```
}
```

1.5.4.5.3 Get an Item by its ID

Request Type	URL
GET	http://[Servername]:[Port ID]/api/Item/[ID]

Implementation Notes

Get an Item by its Item ID.

Accepts Inputs

• Integer Item ID

Input Parameter Type

URL

Returns

• An IRItem object containing an array of IRColumns with fields described in Response Class below

Response Content Type

Application/json

Response Class

- IRItem

Property	Type	Description
columns	Array[IRColumn] (Optional)	Columns; corresponds to view.
tabSingularName	String (optional)	Singular name for item's tab.

Property	Type	Description
edocFile	String (optional)	Base64 encoded string of the edoc file. If creating, must provide a column value for I_E_USER_FILE_NAME
contentType	String (optional)	Content type for uploading edoc file.
Id	Integer (optional)	Item id of item.
quickDescription	String (optional)	Quick Description.
barcode	String (optional)	Barcode.
tabId	Integer (optional)	ID of tab.

- IRColumn

Property	Type	Description
columnName	String (optional)	Name of column.
caption	String (optional)	Caption of column.
value	String (optional)	Value of column.
type	String (optional)	Data type of column.

Sample Code

```
// ****************************************************************************
// * Item - Get a single Item by its ID
// ****************************************************************************

// w is a string containing the http://[Servername]:[Port ID] part of the URL
// 303 is the ID of the Box being retrieved
// objItem will contain the Item if the get is successful

public partial class IRItem
{
  public virtual List<IRColumn> columns { get; set;
  public virtual String TabSingularName { get; set; }
```

```
  public virtual String EdocFile { get; set; }
  public virtual String ContentType { get; set; }
  public virtual Int32 Id { get; set; }
  public virtual String QuickDescription { get; set; }
  public virtual String Barcode { get; set; }
  public virtual Int32 TabId { get; set; }
}

public partial class IRColumn
{
  public virtual String ColumnName { get; set; }
  public virtual String Caption { get; set; }
  public virtual String Value { get; set; }
  public virtual String Type { get; set; }
}

public IRItem GetItemByID()
{
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/Item/303");
  SetHeaders(webRequest, "GET", null);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  IRItem objItem = JsonConvert.DeserializeObject<IRItem>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  return objItem;
}
```

1.5.4.5.4 Perform an Advanced Search for an Item

Request Type	URL
POST	http://[Servername]:[Port ID]/api/ItemSearch

Implementation Notes

Uses an IRItemSearch object to do a more advanced search for an Gimmal Item.

TabID is a required field.

The search types are limited; you cannot use this to search using a Range Field.

Special Search allowed values:

• Not set or “*none*” – default value; Special Search not set

• “*missing*” – return Items of the given TabID that have been marked as missing

• "*topshelfuser*" – return Items of the given TabID that are top level items, that can't be contained in any other item

• "*keyword*" – returns all Items of the given TabID that contain the supplied keyword in any of their database columns

• "*mycontents*" – not currently documented

• "*crudxml*" – not currently documented

Accepts Inputs

An IRItemSearch with an array of KeyValuePairs embedded in it. See Input Parameter Format below

Input Parameter Type

Application/json body

Input Parameter Format

IRItemSearch

Property	Type	Description
specialSearch	String (optional)	Special searches.
lastSyncDate	String (optional)	Used for topshelfuser search to only get items created after this date.
tabId	Integer (required)	ID of tab.
Barcode	String (optional)	Barcode of item.
searchTerms	Dictionary<String, object> (Optional)	If nothing else is provided, Gimmal will use this for an advanced search.
includeEdocFile	Boolean (optional)	Whether the actual edoc file should be returned with the metadata. Not used right now, file is always included.
viewDisplay	Boolean (optional)	Just return the fields that should be shown on the view page.

Property	Type	Description
getForeignKeyDesc	Boolean (optional)	For foreign keys, get the text or quick description instead of the ID.
crudXml	String (optional)	

Returns

• An IEnumerable<IRItem> object containing a list of IRColumn fields described in Response Class below

Response Content Type

Application/json

Response Class

- IRItem

Property	Type	Description
columns	Array[IRColumn] (Optional)	Columns; corresponds to view.
tabSingularName	String (optional)	Singular name for item's tab.
edocFile	String (optional)	Base64 encoded string of the edoc file. If creating, must provide a column value for I_E_USER_FILE_NAME
contentType	String (optional)	Content type for uploading edoc file.
Id	Integer (optional)	Item id of item.
quickDescription	String (optional)	Quick Description.
barcode	String (optional)	Barcode.
tabId	Integer (optional)	ID of tab.

- IRColumn

Property	Type	Description
columnName	String (optional)	Name of column.
caption	String (optional)	Caption of column.
value	String (optional)	Value of column.
type	String (optional)	Data type of column.

Sample Code

```
// ***************************************************************************
// * Item - Advance Search for Items
// ***************************************************************************

public partial class IRItem
{
  public virtual List<IRColumn> columns { get; set; }
  public virtual String TabSingularName { get; set; }
  public virtual String EdocFile { get; set; }
  public virtual String ContentType { get; set; }
  public virtual Int32 Id { get; set; }
  public virtual String QuickDescription { get; set; }
  public virtual String Barcode { get; set; }
  public virtual Int32 TabId { get; set; }
}

public partial class IRColumn
{
  public virtual String ColumnName { get; set; }
  public virtual String Caption { get; set; }
  public virtual String Value { get; set; }
  public virtual String Type { get; set; }
]

public partial class IRItemSearch
{
  public virtual String SpecialSearch { get; set; }
  public virtual String LastSyncDate { get; set; }
  public virtual int TabId { get; set; }
  public virtual String Barcode { get; set; }
  public virtual Dictionary<String, object> SearchTerms { get; set; }
  public virtual bool IncludeEdocFile { get; set; }
  public virtual bool ViewDisplay { get; set; }
  public virtual bool GetForeignKeyDesc { get; set; }
  public virtual String CrudXML { get; set; }
```

```
}

public IEnumerable<IRItem> ItemSearch()
{
  // w is a string containing the http://[Servername]:[Port ID] part of the URL
  IRItemSearch IRIS = new IRItemSearch();
  IRIS.TabId = 202; // Box Item Type
  IRIS.SearchTerms = new Dictionary<String, object>();

  // Search the "Box_Description" database column for rows with value "Little Box":
  IRIS.SearchTerms.Add("BOX_DESCRIPTION", "Little Box");
  // Search for Missing Boxes
  //IRIS.SpecialSearch = "missing";
  string body = JsonConvert.SerializeObject(IRIS);
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/ItemSearch");
  SetHeaders(webRequest, "POST", body)
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  IEnumerable<IRItem> objFoundItems =
JsonConvert.DeserializeObject<IEnumerable<IRItem>>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  webResponse = null;
  return objFoundItems;
}
```

1.5.4.5.5 Get the view URL for the given Item ID of an Item

Request Type	URL
GET	http://[Servername]:[Port ID]/api/viewurl/[Item ID]

Implementation Notes

Get the URL to view an Item by its Item ID.

Accepts Inputs

• Integer Item ID

Input Parameter Type

URL Query String

Returns

• A string containing the URL to the Item represented by the given Item ID

Response Content Type

Application/json

Response Class

string

Sample Code

```
// ***************************************************************************
// * Item - Get the URL for a single Item by its ID
// ***************************************************************************

// w is a string containing the http://[Servername]:[Port ID] part of the URL
// 303 is the ID of the Box whose URL we want

public String GetURLByID()
{
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/viewurl/303");
  SetHeaders(webRequest, "GET", null);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  String strURL = JsonConvert.DeserializeObject<String>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  return strURL;
}
```

1.5.4.6 Get Label Queues for a Tab

Request Type	URL
GET	http://[Servername]:[Port ID]/api/labelprofiles/[Tab ID]

Implementation Notes

Get label queues that are available for the given Tab ID

Accepts Inputs

• Integer Tab ID.

Input Parameter Type

URL

Input Parameter Class

None.

Returns

• An IEnumerable<IRLabelProfile> object with fields described in Response Class below

Response Content Type

Application/json

Response Class

IRLabelProfile

Property	Type	Description
name	String (optional)	Name of profile.
Id	Integer (optional)	ID of profile.
vendorId	Integer (optional)	ID of vendor.

Sample Code

```
// ****************************************************************************
// * Label - Get Label Queues for a given Tab (Item Type)
// ****************************************************************************

public partial class IRLabelProfile
{
  public virtual String Name { get; set; }
  public virtual int Id { get; set; }
```

```
  public virtual int VendorId { get; set; }
}

// w is a string containing the http://[Servername]:[Port ID] part of the URL
// 202 is the Item Type ID

public IEnumerable<IRLabelProfile> GetLabelQueues()
{
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/labelprofiles/202");
  SetHeaders(webRequest, "GET", null);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  IEnumerable<IRLabelProfile> objQueues =
JsonConvert.DeserializeObject<IEnumerable<IRLabelProfile>>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  return objQueues;
}
```

1.5.4.7 Picklist

1.5.4.7.1 To get the Picklist for a Tab

Request Type	URL
GET	http://[Servername]:[Port ID]/api/Pickllist/[Tab ID]

Implementation Notes

Gets Picklist rows for a given TabID

Accepts Inputs

• Integer TabID

Input Parameter Type

URL

Returns

• An IRPicklistItem object with fields described in Response Class below

Response Content Type

Application/json

Response Class

IRPicklistItem

Property	Type	Description
columns	Array[KeyValuePair[String,Object] (Optional)	Columns on the picklist report.
quickDescription	String (optional)	
Id	Integer (optional)	
tabId	Integer (optional)	
keyValuePair[String,Object]		
key	String (optional)	
value	String (optional)	

Sample Code

```
// ***************************************************************************
// * Picklist - Gets picklist rows for a given Tab (Item Type)
// ***************************************************************************

public partial class IRPicklistItem
{
  public virtual Dictionary<String, object> Columns { get; set; }
  public virtual String QuickDescription { get; set; }
  public virtual int Id { get; set; }
  public virtual int TabId { get; set; }
}

// w is a string containing the http://[Servername]:[Port ID] part of the URL
// 202 is the integer TabID (Item Type ID)

public IEnumerable<IRPicklistItem> GetPicklistByTab()
{
```

```
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/picklist/202");
  SetHeaders(webRequest, "GET", null);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  IEnumerable<IRPicklistItem> objItems =
JsonConvert.DeserializeObject<IEnumerable<IRPicklistItem>>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  return objItems;
}
```

1.5.4.8 Request

1.5.4.8.1 Get all Item checkout Requests

Request Type	URL
GET	http://[Servername]:[Port ID]/api/Request

Implementation Notes

Gets data describing all Gimmal Item checkout Requests

Accepts Inputs

None

Returns

• An IRRequest array with fields described in Response Class below. If there are no requests, the response body will have 0 length

Response Content Type

Application/json

Response Class

IRRequest

Property	Type	Description
Id	Integer (optional)	Auto-provided for new requests.
itemId	Integer (optional)	Required for new requests.
itemDescription	String (optional)	Quick Description for item, only provided if GetDescription = true.
destinationItemId	Integer (optional)	The item ID for the destination.
destinationDescription	String (optional)	QD for destination, only provided if GetDescription = true.
waitlist	Boolean (optional)	Auto-provided for new requests.
createDate	String (optional)	The create date.
requestorName	String (optional)	Auto-provided for new requests.
requestorDesc	String (optional)	Auto-provided for new requests.
status	Integer (optional)	Status ID
statusDescription	String (optional)	Text value for status.
batchNumber	Integer (optional)	Useful for tracking a batch of requests in Gimmal .
fulfillmentMethod	Integer (optional)	Used if fulfillment method other than transferring is desired.
requestType	Integer (optional)	Required and only applicable for new requests.
comment	String (optional)	Comment.

Sample Code

```
// ****************************************************************************
// * Request - Gets all checkout Requests in Gimmal
// ****************************************************************************
```

```
public partial class IRRequest
{
  public virtual int Id { get; set; }
  public virtual int ItemId { get; set; }
  public virtual String ItemDescription { get; set; }
  public virtual int DestinationItemId { get; set; }
  public virtual String DestinationDescription { get; set; }
  public virtual bool Waitlist { get; set; }
  public virtual String CreateDate { get; set; }
  public virtual String RequestorName { get; set; }
  public virtual String RequestorDesc { get; set; }
  public virtual int Status { get; set; }
  public virtual String StatusDescription { get; set; }
  public virtual int BatchNumber { get; set; }
  public virtual int FulfillmentMethod { get; set; }
  public virtual int RequestType { get; set; }
  public virtual String Comment { get; set; }
}

// w is a string containing the http://[Servername]:[Port ID] part of the URL

public IEnumerable<IRRequest> GetAllRequests()
{
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/Request");
  SetHeaders(webRequest, "GET", null);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  IEnumerable<IRRequest> objRequests =
JsonConvert.DeserializeObject<IEnumerable<IRRequest>>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  return objRequests;
}
```

1.5.4.8.2 Create a new Item checkout Request

Request Type	URL
POST	http://[Servername]:[Port ID]/api/Request

Implementation Notes

Generates a new Item checkout Request. If destination Item is not provided, then a container is auto selected. Request Type can be 1 (Delivery), 2 (Pickup), or 4 (Renew).

Accepts Inputs

See Input Parameter Format below

Input Parameter Type

Application/json body

Input Parameter Format

IRRequest

Property	Type	Description
Id	Integer (optional)	Auto-provided for new requests.
itemId	Integer (optional)	Required for new requests.
itemDescription	String (optional)	Quick Description for item, only provided if GetDescription = true.
destinationItemId	Integer (optional)	The item ID for the destination.
destinationDescription	String (optional)	QD for destination, only provided if GetDescription = true.
waitlist	Boolean (optional)	Auto-provided for new requests.
createDate	String (optional)	The create date.
requestorName	String (optional)	Auto-provided for new requests.
requestorDesc	String (optional)	Auto-provided for new requests.
status	Integer (optional)	Status ID
statusDescription	String (optional)	Text value for status.
batchNumber	Integer (optional)	Useful for tracking a batch of requests in Gimmal Physical.
fulfillmentMethod	Integer (optional)	Used if fulfillment method other than transferring is desired.
requestType	Integer (optional)	Required and only applicable for new requests.

Property	Type	Description
comment	String (optional)	Comment.

Returns

• An IRRequestResult object containing an IRRequest object, ItemBarcode, ItemDescription, Message, and Result fields described in Response Class below

Response Content Type

Application/json

Response Class

- IRRequestResult

Property	Type	Description
request	IRReqest (optional)	The resulting request. Not included if you deleted the request.
itemBarcode	String (optional)	The barcode of the item that was requested.
itemDescription	String (optional)	The description of the item that was requested.
message	String (optional)	If failed, the reason why.
result	Boolean (optional)	Success/fail.

- IRRequest

Property	Type	Description
Id	Integer (optional)	Auto-provided for new requests.
itemId	Integer (optional)	Required for new requests.

Property	Type	Description
itemDescription	String (optional)	Quick Description for item, only provided if GetDescription = true.
destinationItemId	Integer (optional)	The item ID for the destination.
destinationDescription	String (optional)	QD for destination, only provided if GetDescription = true.
waitlist	Boolean (optional)	Auto-provided for new requests.
createDate	String (optional)	The create date.
requestorName	String (optional)	Auto-provided for new requests.
requestorDesc	String (optional)	Auto-provided for new requests.
status	Integer (optional)	Status ID
statusDescription	String (optional)	Text value for status.
batchNumber	Integer (optional)	Useful for tracking a batch of requests in Gimmal Physical.
fulfillmentMethod	Integer (optional)	Used if fulfillment method other than transferring is desired.
requestType	Integer (optional)	Required and only applicable for new requests.
comment	String (optional)	Comment.

Sample Code

```
// *****************************************************************************
// * Request - Create a new Item checkout Request
// *****************************************************************************

public partial class IRRequest
{
  public virtual int Id { get; set; }
  public virtual int ItemId { get; set; }
  public virtual String ItemDescription { get; set; }
```

```
    public virtual int DestinationItemId { get; set; }
    public virtual String DestinationDescription { get; set; }
    public virtual bool Waitlist { get; set; }
    public virtual String CreateDate { get; set; }
    public virtual String RequestorName { get; set; }
    public virtual String RequestorDesc { get; set; }
    public virtual int Status { get; set; }
    public virtual String StatusDescription { get; set; }
    public virtual int BatchNumber { get; set; }
    public virtual int FulfillmentMethod { get; set; }
    public virtual int RequestType { get; set; }
    public virtual String Comment { get; set; }
  }

  public partial class IRRequestResult
  {
    public virtual IRRequest Request { get; set; }
    public virtual String ItemBarcode { get; set; }
    public virtual String ItemDescription { get; set; }
    public virtual String Message { get; set; }
    public virtual bool Result { get; set; }
  }

  public IRRequestResult CreateRequest()
  {
    // w is a string containing the http://[Servername]:[Port ID] part of the URL
    IRRequest Request = new IRRequest();
    Request.ItemId = 40000; // Required; ID of the Item being checked out
    Request.RequestType = 1; // Required; 1=Delivery; 2=Pickup; 4=Renew
    Request.DestinationItemId = 201; // ID of the user to check the Item out to
    string body = JsonConvert.SerializeObject(Request);
    var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/Request");
    SetHeaders(webRequest, "POST", body);
    var webResponse = (HttpWebResponse)webRequest.GetResponse();
    StreamReader sr = new StreamReader(webResponse.GetResponseStream());
    IRRequestResult objResult =
  JsonConvert.DeserializeObject<IRRequestResult>(sr.ReadToEnd());
    sr.Close();
    webResponse.Close();
    webResponse = null;
    return objResult;
  }
```

1.5.4.8.3 Delete an Item checkout Request by Request ID

Request Type	URL
DELETE	http://[Servername]:[Port ID]/api/Request/[ID]

Implementation Notes

Deletes the Item checkout Request that corresponds to the supplied Request ID. If successful, webResponse.StatusCode will be "OK."

Accepts Inputs

- Integer Request ID

Input Parameter Type

URL

Returns

- An HttpStatusCode object

Response Content Type

Application/json

Response Class

HttpStatusCode

Sample Code

```
// ********************************************************************
// * Request - Delete an Item checkout Request
// ********************************************************************

// w is a string containing the http://[Servername]:[Port ID] part of the URL
// 217 is the ID of the Request to be deleted
// If successful, webResponse.StatusCode will be "OK"

public HttpStatusCode DeleteRequest()
{
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/Request/217");
  SetHeaders(webRequest, "DELETE", null);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  return webResponse.StatusCode;
}
```

1.5.4.8.4 Get an Item checkout Request by Request ID

Request Type	URL
GET	http://[Servername]:[Port ID]/api/Request/[ID]

Implementation Notes

Gets the Item checkout Request that corresponds to the supplied Request ID.

Accepts Inputs

• Integer Request ID

Input Parameter Type

URL

Returns

• An IRRequest object with fields described in Response Class below.

Response Content Type

Application/json

Response Class

IRRequest

Property	Type	Description
Id	Integer (optional)	Auto-provided for new requests.
itemId	Integer (optional)	Required for new requests.
itemDescription	String (optional)	Quick Description for item, only provided if GetDescription = true.
destinationItemId	Integer (optional)	The item ID for the destination.

Property	Type	Description
destinationDescription	String (optional)	QD for destination, only provided if GetDescription = true.
waitlist	Boolean (optional)	Auto-provided for new requests.
createDate	String (optional)	The create date.
requestorName	String (optional)	Auto-provided for new requests.
requestorDesc	String (optional)	Auto-provided for new requests.
status	Integer (optional)	Status ID
statusDescription	String (optional)	Text value for status.
batchNumber	Integer (optional)	Useful for tracking a batch of requests in Gimmal Physical.
fulfillmentMethod	Integer (optional)	Used if fulfillment method other than transferring is desired.
requestType	Integer (optional)	Required and only applicable for new requests.
comment	String (optional)	Comment.

Sample Code

```
// ****************************************************************************
// * Request - Gets checkout Request by Request ID
// ****************************************************************************

public partial class IRRequest
{
  public virtual int Id { get; set; }
  public virtual int ItemId { get; set; }
  public virtual String ItemDescription { get; set; }
  public virtual int DestinationItemId { get; set; }
  public virtual String DestinationDescription { get; set; }
  public virtual bool Waitlist { get; set; }
  public virtual String CreateDate { get; set; }
  public virtual String RequestorName { get; set; }
  public virtual String RequestorDesc { get; set; }
```

```
    public virtual int Status { get; set; }
    public virtual String StatusDescription { get; set; }
    public virtual int BatchNumber { get; set; }
    public virtual int FulfillmentMethod { get; set; }
    public virtual int RequestType { get; set;
    public virtual String Comment { get; set; }
  }

  // w is a string containing the http://[Servername]:[Port ID] part of the URL
  // 215 is the ID of the checkout Request to get

  public IRRequest GetRequestByID()
  {
    var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/Request/215");
    SetHeaders(webRequest, "GET", null);
    var webResponse = (HttpWebResponse)webRequest.GetResponse();
    StreamReader sr = new StreamReader(webResponse.GetResponseStream());
    IRRequest objRequest = JsonConvert.DeserializeObject<IRRequest>(sr.ReadToEnd());
    sr.Close();
    webResponse.Close();
    return objRequest;
  }
```

1.5.4.8.5 Update an Item's existing checkout Request by Request ID

Request Type	URL
PUT	http://[Servername]:[Port ID]/api/Request/[ID]

Implementation Notes

Update the existing Item checkout Request that corresponds to the given ID.

Accepts Inputs

• Request ID (required)

• Status (required)

Possible Status Values:

- 1 = Approved
- 2 = Fulfilled
- 3 = Rejected

- 5 = Deleted

See Input Parameter Format below for additional fields.

Input Parameter Type

Application/json body

Input Parameter Format

IRRequest

Property	Type	Description
Id	Integer (optional)	Auto-provided for new requests.
itemId	Integer (optional)	Required for new requests.
itemDescription	String (optional)	Quick Description for item, only provided if GetDescription = true.
destinationItemId	Integer (optional)	The item ID for the destination.
destinationDescription	String (optional)	QD for destination, only provided if GetDescription = true.
waitlist	Boolean (optional)	Auto-provided for new requests.
createDate	String (optional)	The create date.
requestorName	String (optional)	Auto-provided for new requests.
requestorDesc	String (optional)	Auto-provided for new requests.
status	Integer (optional)	Status ID
statusDescription	String (optional)	Text value for status.
batchNumber	Integer (optional)	Useful for tracking a batch of requests in Gimmal Physical.
fulfillmentMethod	Integer (optional)	Used if fulfillment method other than transferring is desired.

Property	Type	Description
requestType	Integer (optional)	Required and only applicable for new requests.
comment	String (optional)	Comment.

Returns

• An IRRequestResult object with an IRRequest object, ItemBarcode, ItemDescription, Message, and Result fields described in Response Class below

Response Content Type

Application/json

Response Class

IRRequestResult

Property	Type	Description
request	IRReqest (optional)	The resulting request. Not included if you deleted the request.
itemBarcode	String (optional)	The barcode of the item that was requested.
itemDescription	String (optional)	The description of the item that was requested.
message	String (optional)	If failed, the reason why.
result	Boolean (optional)	Success/fail.

IRRequest

Property	Type	Description
Id	Integer (optional)	Auto-provided for new requests.

Property	Type	Description
itemId	Integer (optional)	Required for new requests.
itemDescription	String (optional)	Quick Description for item, only provided if GetDescription = true.
destinationItemId	Integer (optional)	The item ID for the destination.
destinationDescription	String (optional)	QD for destination, only provided if GetDescription = true.
waitlist	Boolean (optional)	Auto-provided for new requests.
createDate	String (optional)	The create date.
requestorName	String (optional)	Auto-provided for new requests.
requestorDesc	String (optional)	Auto-provided for new requests.
status	Integer (optional)	Status ID
statusDescription	String (optional)	Text value for status.
batchNumber	Integer (optional)	Useful for tracking a batch of requests in Gimmal Physical.
fulfillmentMethod	Integer (optional)	Used if fulfillment method other than transferring is desired.
requestType	Integer (optional)	Required and only applicable for new requests.
comment	String (optional)	Comment.

Sample Code

```
// ***************************************************************************
// * Request - Update an existing checkout Request
// ***************************************************************************

public partial class IRRequest
{
```

```
  public virtual int Id { get; set; }
  public virtual int ItemId { get; set; }
  public virtual String ItemDescription { get; set; }
  public virtual int DestinationItemId { get; set; }
  public virtual String DestinationDescription { get; set; }
  public virtual bool Waitlist { get; set; }
  public virtual String CreateDate { get; set; }
  public virtual String RequestorName { get; set; }
  public virtual String RequestorDesc { get; set; }
  public virtual int Status { get; set; }
  public virtual String StatusDescription { get; set; }
  public virtual int BatchNumber { get; set; }
  public virtual int FulfillmentMethod { get; set; }
  public virtual int RequestType { get; set; }
  public virtual String Comment { get; set; }
}

public partial class IRRequestResult
{
  public virtual IRRequest Request { get; set; }
  public virtual String ItemBarcode { get; set;
  public virtual String ItemDescription { get; set; }
  public virtual String Message { get; set; }
  public virtual bool Result { get; set; }
}

// w is a string containing the http://[Servername]:[Port ID] part of the URL
// 215 is the ID of the Request you're updating

public IRRequestResult UpdateRequest()
{
  IRRequest Request = new IRRequest();
  Request.Status = 2; //Possible Status Values: 1 = Approved; 2 = Fulfilled; 3 =
Rejected; 5 = Deleted
  Request.DestinationItemId = 201; // ID of the user to check the Item out to
  string body = JsonConvert.SerializeObject(Request);
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/Request/215");
  SetHeaders(webRequest, "PUT", body);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  IRRequestResult objResult =
JsonConvert.DeserializeObject<IRRequestResult>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  webResponse = null;
  return objResult;
}
```

1.5.4.9 Perform an advanced search for Item checkout Requests

Request Type	URL
POST	http://[Servername]:[Port ID]/api/requestsearch

Implementation Notes

Perform an advanced search for Item checkout Requests.

Potential Report Values: 1 (Approved); 2 (Fulfilled).

Accepts Inputs

See Input Parameter Format below

Input Parameter Type

Application/json body

Input Parameter Format

IRRequestSearch

Property	Type	Description
onlyMine	Boolean (optional)	Only get my requests.
report	Integer (optional)	Only requests on the picklist, 2: only requests on the pickup report. TabId is required.
tabId	Integer (optional)	Only get requests for a certain tab.
getDescriptions	Boolean (optional)	Whether to retrieve item descriptions or not.

Returns

• An IRRequest object with fields described in Response Class below

Response Content Type

Application/json

Response Class

IRRequest

Property	Type	Description
Id	Integer (optional)	Auto-provided for new requests.
itemId	Integer (optional)	Required for new requests.
itemDescription	String (optional)	Quick Description for item, only provided if GetDescription = true.
destinationItemId	Integer (optional)	The item ID for the destination.
destinationDescription	String (optional)	QD for destination, only provided if GetDescription = true.
waitlist	Boolean (optional)	Auto-provided for new requests.
createDate	String (optional)	The create date.
requestorName	String (optional)	Auto-provided for new requests.
requestorDesc	String (optional)	Auto-provided for new requests.
status	Integer (optional)	Status ID
statusDescription	String (optional)	Text value for status.
batchNumber	Integer (optional)	Useful for tracking a batch of requests in Gimmal Physical.
fulfillmentMethod	Integer (optional)	Used if fulfillment method other than transferring is desired.
requestType	Integer (optional)	Required and only applicable for new requests.
comment	String (optional)	Comment.

Sample Code

```
// ***************************************************************************
// * Request - Find Item checkout Requests
// ***************************************************************************

public partial class IRRequestSearch
{
  public virtual bool OnlyMine { get; set; }
  public virtual int Report { get; set; }
  public virtual int TabId { get; set; }
  public virtual bool GetDescriptions { get; set; }
}

public partial class IRRequest
{
  public virtual int Id { get; set; }
  public virtual int ItemId { get; set; }
  public virtual String ItemDescription { get; set; }
  public virtual int DestinationItemId { get; set; }
  public virtual String DestinationDescription { get; set; }
  public virtual bool Waitlist { get; set; }
  public virtual String CreateDate { get; set; }
  public virtual String RequestorName { get; set; }
  public virtual String RequestorDesc { get; set; }
  public virtual int Status { get; set; }
  public virtual String StatusDescription { get; set; }
  public virtual int BatchNumber { get; set; }
  public virtual int FulfillmentMethod { get; set; }
  public virtual int RequestType { get; set; }
  public virtual String Comment { get; set; }
}

public IEnumerable<IRRequest> FindRequest()
{
  // w is a string containing the http://[Servername]:[Port ID] part of the URL
  IRRequestSearch RequestSearch = new IRRequestSearch();
  string body = JsonConvert.SerializeObject(RequestSearch);
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/requestsearch");
  SetHeaders(webRequest, "POST", body);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  IEnumerable<IRRequest> objResult =
JsonConvert.DeserializeObject<IEnumerable<IRRequest>>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  webResponse = null;
  return objResult;
}
```

1.5.4.10 Server Time

1.5.4.10.1 To get the UTC time from the Gimmal Web Server

Request Type	URL
GET	http://[Servername]:[Port ID]/api/ServerTime

Implementation Notes

Gets the UTC time from the Gimmal Web Server

Accepts Inputs

None

Input Parameter Type

None

Returns

• A string containing the Gimmal Web Server's UTC time

Response Content Type

Application/json

Response Class

string

Sample Code

```
// ****************************************************************************
// * ServerTime - Get the UTC time from the Gimmal Web Server
// ****************************************************************************

// w is a string containing the http://[Servername]:[Port ID] part of the URL

public DateTime GetDateTime()
```

```
{
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/servertime");
  SetHeaders(webRequest, "GET", null);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  // Converting the string response to a DateTime object
  DateTime objItems = JsonConvert.DeserializeObject<DateTime>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  return objItems;
}
```

1.5.4.11 Tab

1.5.4.11.1 Get all Tabs

Request Type	URL
GET	http://[Servername]:[Port ID]/api/Tab

Implementation Notes

Gets data describing all Gimmal Physical Tabs

Accepts Inputs

None

Input Parameter Type

None

Returns

• An IRTab array with fields described in Response Class below

Response Content Type

Application/json

Response Class

IRTab

Property	Type	Description
Id	Integer (optional)	ID of tab.
singularName	String (optional)	Singular name for tab.
pluralName	String (optional)	Plural name for tab.
isMoveable	Boolean (optional)	Tab is moveable.
isRequestable	Boolean (optional)	Tab can be requested.
autoGenerateBarcode	Boolean (optional)	Tab has barcode auto-generated.
isBarcodeRequired	Boolean (optional)	Whether barcode is required. if not, probably logical tab.
barcodePrefix	String (optional)	Prefix for barcode.
barcodeLength	Integer (optional)	Length for barcode.
isEdoc	Boolean (optional)	Tab is edoc.
displayOrder	Integer (optional)	Display order.
isRetentionEnabled	Boolean (optional)	Tab uses retention.
specialType	Integer (optional)	Special type.

Sample Code

```
// ***************************************************************************
// * Tab - Get all Tabs
// ***************************************************************************

public partial class IRTab
{
  public virtual Int32 Id { get; set; }
  public virtual String SingularName { get; set; }
  public virtual String PluralName { get; set; }
  public virtual Boolean IsMoveable { get; set; }
```

```
    public virtual Boolean IsRequestable { get; set; }
    public virtual Boolean AutoGenerateBarcode { get; set; }
    public virtual Boolean IsBarcodeRequired { get; set; }
    public virtual String BarcodePrefix { get; set; }
    public virtual Int32 BarcodeLength { get; set; }
    public virtual Boolean IsEdoc { get; set; }
    public virtual Int32 DisplayOrder { get; set; }
    public virtual Boolean IsRetentionEnabled { get; set; }
    public virtual Int32 SpecialType { get; set; }
  }

  public IEnumerable<IRTab> GetAllTabs()
  {
    var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/Tab");
    SetHeaders(webRequest, "GET", null);
    var webResponse = (HttpWebResponse)webRequest.GetResponse();
    StreamReader sr = new StreamReader(webResponse.GetResponseStream());
    IEnumerable<IRTab> objItems =
  JsonConvert.DeserializeObject<IEnumerable<IRTab>>(sr.ReadToEnd());
    sr.Close();
    webResponse.Close();
    return objItems;
  }
```

1.5.4.11.2 Get a Subset of Tabs

Request Type	URL
GET	http://[Servername]:[Port ID]/api/Tab?itemtypefilter=[picklist|topshelfuser]

Implementation Notes

Gets data describing specified Gimmal Physical Tabs

Input Parameter Type

URL Query String

Input Parameter Format

The itemtypefilter parameter will be either “picklist” or “topshelfuser.” Picklist: return tabs that are requestable and may be contained by another tab topshelfuser: return tabs that are top level, user, or a shelf.

Returns

• An IRTab array with fields described in Response Class below

Response Content Type

Application/json

Response Class

IRTab

Property	Type	Description
Id	Integer (optional)	ID of tab.
singularName	String (optional)	Singular name for tab.
pluralName	String (optional)	Plural name for tab.
isMoveable	Boolean (optional)	Tab is moveable.
isRequestable	Boolean (optional)	Tab can be requested.
autoGenerateBarcode	Boolean (optional)	Tab has barcode auto-generated.
isBarcodeRequired	Boolean (optional)	Whether barcode is required. if not, probably logical tab.
barcodePrefix	String (optional)	Prefix for barcode.
barcodeLength	Integer (optional)	Length for barcode.
isEdoc	Boolean (optional)	Tab is edoc.
displayOrder	Integer (optional)	Display order.
isRetentionEnabled	Boolean (optional)	Tab uses retention.
specialType	Integer (optional)	Special type.

Sample Code

```
// ****************************************************************************
// * Tab - Get filtered Tabs
// ****************************************************************************

public partial class IRTab
{
  public virtual Int32 Id { get; set; }
  public virtual String SingularName { get; set; }
  public virtual String PluralName { get; set; }
  public virtual Boolean IsMoveable { get; set; }
  public virtual Boolean IsRequestable { get; set; }
  public virtual Boolean AutoGenerateBarcode { get; set; }
  public virtual Boolean IsBarcodeRequired { get; set; }
  public virtual String BarcodePrefix { get; set; }
  public virtual Int32 BarcodeLength { get; set; }
  public virtual Boolean IsEdoc { get; set; }
  public virtual Int32 DisplayOrder { get; set; }
  public virtual Boolean IsRetentionEnabled { get; set; }
  public virtual Int32 SpecialType { get; set; }
}

// w is a string containing the http://[Servername]:[Port ID] part of the URL

public IEnumerable<IRTab> GetFilteredTabs()
{
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/tab?
itemtypefilter=topshelfuser");
  SetHeaders(webRequest, "GET", null);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  IEnumerable<IRTab> objTabs =
JsonConvert.DeserializeObject<IEnumerable<IRTab>>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  return objTabs;
}
```

1.5.4.11.3 Get a single Tab by Tab ID

Request Type	URL
GET	http://[Servername]:[Port ID]/api/Tab/[ID]

Implementation Notes

Gets data describing a single specified Gimmal Physical Tab.

Accepts Inputs

• Integer Tab ID.

Input Parameter Type

URL

Returns

• An IRTab object with fields described in Response Class below.

Response Content Type

Application/json

Response Class

IRTab

Property	Type	Description
Id	Integer (optional)	ID of tab.
singularName	String (optional)	Singular name for tab.
pluralName	String (optional)	Plural name for tab.
isMoveable	Boolean (optional)	Tab is moveable.
isRequestable	Boolean (optional)	Tab can be requested.
autoGenerateBarcode	Boolean (optional)	Tab has barcode auto-generated.
isBarcodeRequired	Boolean (optional)	Whether barcode is required. if not, probably logical tab.
barcodePrefix	String (optional)	Prefix for barcode.
barcodeLength	Integer (optional)	Length for barcode.

Property	Type	Description
isEdoc	Boolean (optional)	Tab is edoc.
displayOrder	Integer (optional)	Display order.
isRetentionEnabled	Boolean (optional)	Tab uses retention.
specialType	Integer (optional)	Special type.

Sample Code

```
// ****************************************************************************
// * Tab - Get a single Tab by its ID
// ****************************************************************************

public partial class IRTab
{
  public virtual Int32 Id { get; set; }
  public virtual String SingularName { get; set; }
  public virtual String PluralName { get; set; }
  public virtual Boolean IsMoveable { get; set; }
  public virtual Boolean IsRequestable { get; set; }
  public virtual Boolean AutoGenerateBarcode { get; set; }
  public virtual Boolean IsBarcodeRequired { get; set; }
  public virtual String BarcodePrefix { get; set; }
  public virtual Int32 BarcodeLength { get; set; }
  public virtual Boolean IsEdoc { get; set; }
  public virtual Int32 DisplayOrder { get; set; }
  public virtual Boolean IsRetentionEnabled { get; set; }
  public virtual Int32 SpecialType { get; set; }
}

// w is a string containing the http://[Servername]:[Port ID] part of the URL
// 201 is the ID for a particular Tab

public IRTab GetTab()
{
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/tab/201");
  SetHeaders(webRequest, "GET", null);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  IRTab objTab = JsonConvert.DeserializeObject<IRTab>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  return objTab;
}
```

1.5.4.12 Test

1.5.4.12.1 To test connection with Gimmal Physical Web Services

Request Type	URL
GET	http://[Servername]:[Port ID]/api/Test

Implementation Notes

Tests connection with Gimmal Web Services. Does not require authentication.

Accepts Inputs

Nothing

Input Parameter Type

None

Returns

• A successful test returns a string containing "Successfully connected to InfolinxRest"

Note: Infolinx is the former name for Gimmal Physical and can be found in certain methods and documentation.

Response Content Type

Application/json

Response Class

String

Sample Code

```
// ********************************************************************************
// * Test - Test connection with Gimmal Physical Web Services. Authentication not
needed.
```

```
// ********************************************************************************

// w is a string containing the http://[Servername]:[Port ID] part of the URL
// A successful test returns string "Successfully connected to InfolinxRest"

public string Test()
{
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/Test");
  SetHeaders(webRequest, "GET", null);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  string testResponse = JsonConvert.DeserializeObject<string>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  return testResponse;
}
```

1.5.4.13 Transfer

1.5.4.13.1 To Transfer a group of Items to a new containing Item (location)

Request Type	URL
POST	http://[Servername]:[Port ID]/api/Transfer

Implementation Notes

Transfers specified Gimmal Physical items to the given location

Accepts Inputs

• String containing the Barcode of the Location to which Items should be transferred.

• String array containing the Barcodes of the Items to be transferred.

Input Parameter Type

Application/json body

Input Parameter Class

IRTransfer

Property	Type	Description
location	String	Barcode of location to transfer to.
items	Array[string]	List of item barcodes to transfer.

Returns

An IRItemResultList with a Message, Result, and a repeating list of IRItemResults containing the actual success of each item.

Response Content Type

Application/json

Response Class

- IRItemResultList

Property	Type	Description
message	String (optional)	Overall result string for the list.
result	Boolean (optional)	True if all succeeded, false if any failed.
itemResults	Array[IRItemResult] (optional)	The list of individual item results.

- IRItemResult

Property	Type	Description
locationBarcode	String (optional)	Location barcode if applicable for the action.
locationDescription	String (optional)	Location QD if applicable for the action.
itemId	Integer (optional)	ID of item.
itemBarcode	String (optional)	Barcode of item.

Property	Type	Description
itemDescription	String (optional)	QuickDescription of item.
requestId	Integer (optional)	ID of request (if this was a request).
result	Boolean (optional)	Successful or not.
reason	Integer (optional)	Corresponds to some enum for harcoded results.
message	String (optional)	May contain some extra info about why this failed.

Sample Code

```
// ******************************************************************************
// * Transfer - Transfer Items to a new containing Item (location)
// ******************************************************************************

public partial class IRTransfer
{
  public virtual String Location { get; set; }
  public virtual String[] Items { get; set; }
}

public partial class IRItemResultList
{
  public virtual String Message { get; set; }
  public virtual bool Result { get; set; }
  public virtual IRItemResult[] ItemResults { get; set; }
}

public partial class IRItemResult
{
  public virtual String LocationBarcode { get; set; }
  public virtual String LocationDescription { get; set; }
  public virtual Int32 ItemId { get; set; }
  public virtual String ItemBarcode { get; set; }
  public virtual String ItemDescription { get; set; }
  public virtual Int32 RequestId { get; set; }
  public virtual bool Result { get; set; }
  public virtual Int32 Reason { get; set; }
  public virtual String Message { get; set; }
}

// w is a string containing the http://[Servername]:[Port ID] part of the URL
// 0000010265 is the barcode of the user to whom the Items are being transferred
// 0000011667 and 0000017757 are the barcodes of the items being transferred
```

```
public IRItemResultList doTransfer()
{
  IRTransfer t = new IRTransfer();
  t.Location = "0000010265"; // Barcode of Location or User to which Items should be
transfered
  t.Items = new string[] {"0000011667", "0000017757"}; // Array of Barcodes of Items to
be transfered
  string body = JsonConvert.SerializeObject(t);
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/transfer");
  SetHeaders(webRequest, "POST", body);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  IRItemResultList objItems =
  JsonConvert.DeserializeObject<IRItemResultList>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  webResponse = null;
  return objItems;
}
```

1.5.4.14 Get Error Log File

1.5.4.14.1 Get error log from import process

Request Type	URL
POST	http://[Servername]:[Port ID]/api/GetLogErrorFile

Implementation Notes

Method returns an IRIO item. Set the maximum file transfer size, file name and extension and count of bytes received before calling this method.

Response Content Type

Application/json

Response Class

IRIO

Property	Type	Description
results	String (optional)	

Property	Type	Description
fileName	String (optional)	
extension	String (optional)	
counterOfBytesReceived	Integer (optional)	
totalFileLength	Integer (optional)	
fileLocationType	String (optional)	'Edoc' or 'Interchange' or 'Label' or 'Report'.
buffer	Array[string] (optional)	
maxFileTransferSize	Integer (optional)	
filePath	String (optional)	
barcodeString	String (optional)	

Returns

• An IRIO object

Sample Code:

```
public class IRIO
{
  public string Results { get; set; }
  public string FileName { get; set; }
  public string Extension { get; set; }
  public int Position { get; set; }
  public int CountOfBytesReceived { get; set; }
  public long TotalFileLength { get; set; }
  public bool NewFile { get; set; }
  public FileLocation FileLocationType { get; set; }
  public enum FileLocation
  {
    Edoc = 1,
    Interchange = 2,
    Label = 3,
    Report = 4
  }
```

```
  public long MaxFileTransferSize { get; set; }
  public string FilePath { get; set; }
  public bool Complete { get; set; }
  public byte[] buffer { get; set; }
}

public static async Task<IRIO> GetFileInChunks(IRIO objIO)
{
  var handler = new HttpClientHandler
  {
    Proxy = WebRequest.GetSystemWebProxy(),
    UseProxy = true
  };
  using (var client = new IRIOClient(handler,InfolinxRestBaseAddress))
  {
    SetupHttpClient(client.HttpClient, UserName, Password);
    var response = await client.GetAsyncInChunks(objIO);
    response.EnsureSuccessStatusCode();
    IRIO results = await response.Content.ReadAsAsync<IRIO>().ConfigureAwait(true);
    return results;
  }
}

IO.MaxFileTransferSize = this._FileSizeToTransfer != 0 ?
Convert.ToInt64(this._FileSizeToTransfer) : 2097152; //default to 2MB if no size given
IO.FileName = strFileName;
IO.Extension = strExtension;
IO.CountOfBytesReceived = 0
IRIO Ret = await InfolinxRestProxy.GetFileInChunks(IO);
if (Ret.FileName.Length > 0)
{
  long lngReturnedLength = Convert.ToInt64(Ret.buffer.Length);
  IO.CountOfBytesReceived = Ret.CountOfBytesReceived;
  while (Ret.TotalFileLength >= lngReturnedLength)
  {
    Stream stream = new MemoryStream(Ret.buffer);
    using (System.IO.FileStream output = new System.IO.FileStream(processedFilesDir +
Ret.FileName, FileMode.Append))
    {
      stream.CopyTo(output);
    }
    if (Ret.TotalFileLength > lngReturnedLength)
    {
      Ret = await InfolinxRestProxy.GetFileInChunks(IO);
      IO.CountOfBytesReceived += Ret.CountOfBytesReceived;
      lngReturnedLength += Convert.ToInt64(Ret.buffer.Length);
    }
    else
    {
      this.LogAndErrorFileRetrieved = true;
      break;
    }
  }
}
```

1.5.4.15 Send Chunks

Request Type	URL
POST	http://[Servername]:[Port ID]/api/SendChunks

Implementation Notes

Method returns an IRIO item. Set the file name buffer size, file location, new file boolean and starting position before calling this method.

Response Content Type

Application/json

Response Class

IRIO

Property	Type	Description
results	String (optional)	
fileName	String (optional)	
extension	String (optional)	
counterOfBytesReceived	Integer (optional)	
totalFileLength	Integer (optional)	
fileLocationType	String (optional)	'Edoc' or 'Interchange' or 'Label' or 'Report'.
buffer	Array[string] (optional)	
maxFileTransferSize	Integer (optional)	
filePath	String (optional)	
barcodeString	String (optional)	

Sample Code:

```
public async static Task<IRIO> PostAsyncInChuncks(IRIO objIO)
{
  var handler = new HttpClientHandler
  {
    Proxy = WebRequest.GetSystemWebProxy(),
    UseProxy = true
  };
  using (var client = new IRIOClient(handler,InfolinxRestBaseAddress))
  {
    SetupHttpClient(client.HttpClient,UserName,Password);
    var response = await client.PostAsyncInChuncks(objIO);
    response.EnsureSuccessStatusCode();
    return await response.Content.ReadAsAsync<IRIO>();
  }
}

public async Task<HttpResponseMessage> PostAsyncInChuncks(IRIO objIO)
{
  return await HttpClient.PostAsJsonAsync<IRIO>("api/sendChunks",
objIO).ConfigureAwait(false);
}

public async Task<string> TextFileUpload()
{
  FileStream fs = null;
  string uploadedFileName = "";
  try
  {
    fs = File.OpenRead(this._fileNameAndPath);
    long lngTransferSize = fs.Length
    fs.Close();
    fs.Dispose();
    long maxTransferSize = 2097152; //2 MB
    if (this._FileSizeToTransfer > 0)
    {
      maxTransferSize = this._FileSizeToTransfer;
    }
    if (maxTransferSize > lngTransferSize)
    {
      maxTransferSize = lngTransferSize;
    }
    byte[] buffer = new byte[maxTransferSize];
    int len;
    InfolinxRestProxy.InfolinxRestBaseAddress = this._InfolinxRestBaseAddress;
    InfolinxRestProxy.UserName = this._UserName;
    InfolinxRestProxy.Password = this._Password;
    IRIO IO = new IRIO();
    IO.FileName = this._fileName;
    IO.buffer = buffer;
    IO.FileLocationType = IRIO.FileLocation.Interchange;
    IO.Position = 0;
    IO.NewFile = true;
```

```
    int Offset = 0;
    using (FileStream f = new FileStream(this._fileNameAndPath, FileMode.Open,
FileAccess.Read))
    {
      try
      {
        f.Position = Offset;
        int BytesRead = 0;
        while (Offset != f.Length)
        {
          BytesRead = f.Read(buffer, 0, buffer.Length);
          if (BytesRead != buffer.Length)
          {
            maxTransferSize = BytesRead;
            byte[] TrimmedBuffer = new byte[BytesRead];
            Array.Copy(buffer, TrimmedBuffer, BytesRead);
            buffer = TrimmedBuffer;
            IO.buffer = buffer;
          }
          IRIO Ret = await InfolinxRestProxy.PostFileInChuncks(IO);
          IO.FileName = Ret.FileName;
          IO.NewFile = false;
          Offset += BytesRead;
        }
      }
      catch (Exception ex)
      {
        Notifications.NotificationService.WriteToEventLog("Error uploading import file
" + ex.ToString(), EventLogEntryType.Error, this._session);
      }
    }
    uploadedFileName = IO.FileName;
  }
  catch (Exception EX)
  {
    this.OnExceptionOccurred(EX);
    return EX.ToString();
  }
  finally
  {
    if (fs != null)
    {
      fs.Dispose();
    }
  }
  return uploadedFileName;
}
```

Please contact Gimmal Support[32] with any questions.

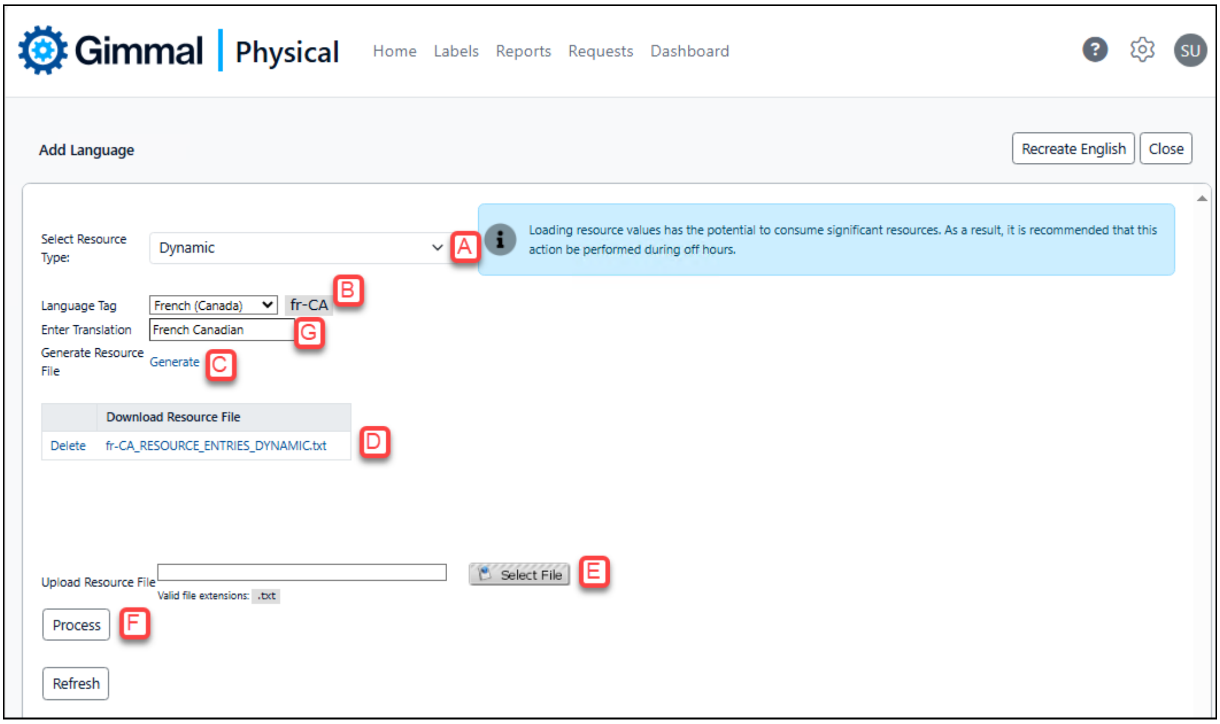
32. mailto:support@gimmal.com

1.5.5 Creating Resource Language Files

The language used by the Gimmal Physical interface is US-English by default. However, the application contains options that allow Administrators to change the text values of the application to a different language. This is done by first exporting the resource files for all available labels, then providing a translated version of those labels from English to the chosen language. These updates will be added to the application, which will allow users to choose their language option.

Please see the steps below for more details.

> Please read through all the directions and double-check your translations before making any changes. Once the languages are added to the application, it is very difficult to change the values.



1. Navigate to Admin | Resource Files using the gear icon in the upper right of the screen.
2. Click on ‘Create Resource ' at the bottom of the 'Resource File’ page. This opens the 'Add Language' Page.
3. Select an option from 'Select Resource Type' to choose which file you would like to create (A). Note: Both files are needed for a full translation to be accomplished.
   a. Dynamic: Fields that have been added to or adjusted in the application (Tabs, column names, etc.)
   b. Static: Always present: Upper-level menus, fixed labels, can't be configured/adjusted.
4. Select a language from the drop-down 'Language Tag'(B).
   Note: If your preferred language code is not found in the list, please contact technical support at support@gimmal.com[33] for next steps.

5. Choose a name for the type of translation (e.g., French Canadian) that will appear in the drop-down list on the Preferences page. (G)
6. Click the 'Generate' link to create the selected file. (C)
   Note: This creates a pre-translation resource file that will be listed in the 'Download Resource File' list.
7. Click on the listed file to download it from the 'Download Resource File' section. (D)
8. Open the file in a compatible program. There will be four pipe-delimited columns:
   a. Language Prefix: The language selected in the drop-down field in Step 4 (B)
   b. Source: Table where the value is used
   c. Key: Name of the ‘field’ for the listed value
   d. Value: Text that appears in the UI
      NOTE: **Only** the Value field should be changed.
9. Update the values in the fourth column to the same text in your preferred language.
   Note:
   a. There are a large number of fields to edit, so this may take some time
   b. Some of the values may be blank. These fields do not need to have any text.
   c. Do NOT change any of the generated text in the first three columns. Only the Value field should be updated.
10. When translations are complete, make sure the changes have been verified and saved.
    Note: It is very difficult to undo a resource file update. Please double-check that all values are translated appropriately before continuing.
11. Click the 'Select File' in the 'Upload Resource File' section and choose the updated file. (E)
12. Click 'Process' to add the new translation to the application. (F)
13. Repeat the process for each file (Dynamic and Static) for each language that needs to be added.
14. Once a new language has been added to the application, a new preference will appear in the Preferences | Application page per user.
15. For the ‘Selected language for application' option, choose the new language from the drop-down box. The names that appear in the drop-down are chosen by the value (G) on the 'Add Language’ page.
    Note: The scope cannot be changed from 'User'.
16. Choose 'Set as Default' ***only*** if you wish the language selected to be defaulted for everyone who logs in, replacing the default American English. Individual users would then need to navigate to their preferences page to set it back.
17. Click ‘Save Changes’.
18. When using SSO, the application will use the values in the new language at the next log-in. If you are using the 'Forms' login, you can choose the language on the login page.

33. mailto:support@gimmal.com

Helpful Tips:

- The export files are pipe-delimited. The values (fourth column) can be edited in Excel or Notepad.
- Many values are repeated, so judicious use of 'Find and Replace' may prove helpful.
- Save a copy of the old resource file before commencing the update for use as a backup and reference.

1.5.6 Technical Specifications - Iron Mountain Connector

The Iron Mountain connector facilitates the transfer of requests for delivery and pickup of boxes or files between Gimmal Physical and Iron Mountain data centers.

Additional information regarding setting up and using the Iron Mountain Connector can be found here[34].

1.5.6.1 File Creation

When requests are submitted to the Iron Mountain sftp site a files with a .ord extension for pickups or deliveries and .add extension for additions are created and posted to the Iron Mountain site. Data to create these files is constructed using the following:

1.5.6.1.1 Pickup or delivery files (.ord) – Header Information

Gimmal Physical Source	Iron Mountain Reference
Customer ID (On Customer tab)	CustID
District ID (On Customer tab)	DistID
Address Information (Transit Information tab). If Ship To Code is present it is used instead of address information.	Ship to address information

1.5.6.1.2 Pickup or delivery files (.add) – column mapping for Boxes.

Note: For the most part these fields can be empty as this data is now captured and managed in Gimmal Physical.

34. https://docs.gimmal.com/gp/user-guide-for-iron-mountain-integration

Gimmal Physical Source	Iron Mountain Reference
Customer ID	CustomerNumber
Box Number (if empty then Barcode will be used)	SkpBoxNumber
Barcode	CustomerBoxNumber
Department ID	DepartmentId
Record Code	RecordCode
Date From	FromDate
Date To	ToDate
Major Description	MajorDescription
Minor Description	MinorDescription
Scheduled Destruction Date	DestructionDate
Destruction Indicator (defaults to U)	DestructionIndicator
Long Description 1	LongDescription1
Long Description 2	LongDescription2
Long Description 3	LongDescription3
Long Description 4	LongDescription4
Long Description 5	LongDescription5
Long Description 6	LongDescription6
Long Description 7	LongDescription7
Long Description 8	LongDescription8

Extra 1	Extra1
Extra 2	Extra2
Division ID	DivisionId
Create Date (the boxes create date)	CreateDate
Event Date	EventDate
Reference 1	Reference1
Box Hold Code	BoxHoldCode

1.5.6.1.3 Pickup or delivery files (.add) – Item Information (Files)

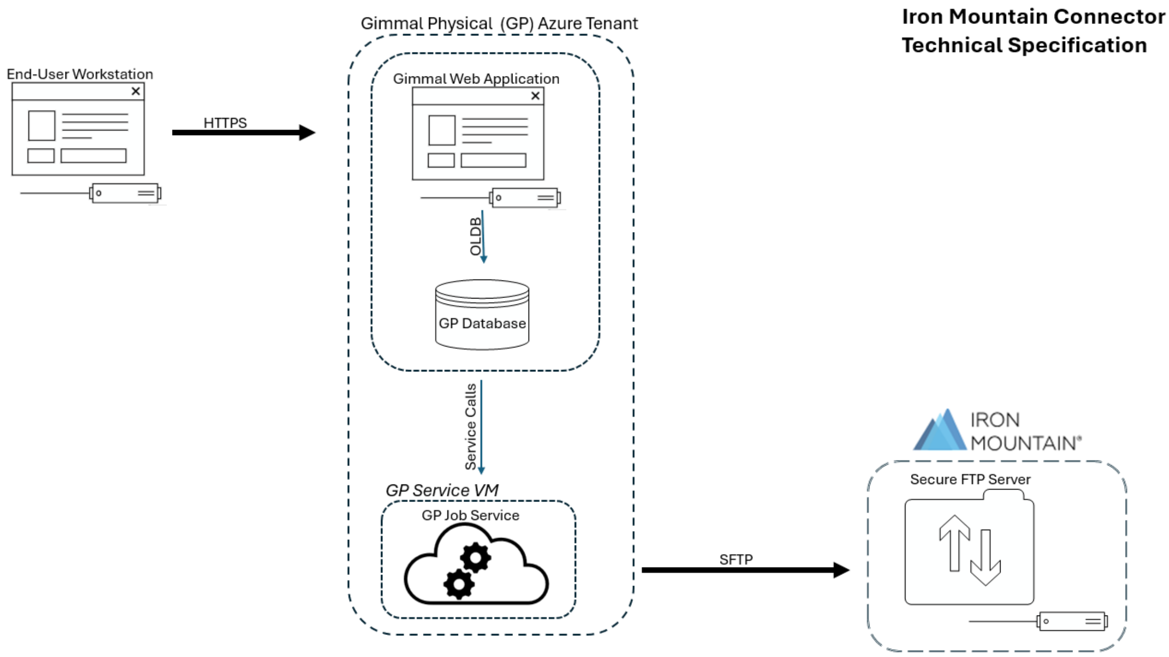
Gimmal Physical Source	Iron Mountain Reference
Customer ID	CustomerNumber
Box Number (if empty then Barcode will be used)	SkpBoxNumber
Barcode	CustomerBoxNumber
Department ID	DepartmentId
Record Code	RecordCode
Date From	FromDate
Date To	ToDate
File Desc 1	FileDescription1
File Desc 2	FileDescription2
Extra 1	Extra1

Extra 2	Extra2
Third Party ID	ThirdPartyId
Division ID	DivisionId
File Description 3	FileDescription3
File Description 4	FileDescription4
Create Date (the files create date)	CreateDate
Birth Date	BirthDate
Discharge Date	DischargeDate
Social Security Number	SocialSecurityNumber
Volume Number	VolumeNumber
Unique Barcode	UniqueBarcode
Customer Barcode	CustBarcode
File Description 5	FileDescription5
File Description 6	FileDescription6
File Description 7	FileDescription7
File Description 8	FileDescription8
File Description 9	FileDescription9
Type	Type

1.5.6.2 Data Flow

End-users start the data flow process by submitting requests into Gimmal Physical using a web browser on a workstation. Based on the submitted request, Gimmal Physical job services will read the database to create and prepare the appropriate files to be transmitted. The files are transferred via Secure FTP protocol and saved on a secure Iron Mountain FTP site using dedicated credentials managed by Iron Mountain and the customer. Iron Mountain's SafeKeeper system processes these files to initiate transactions with their Record Centers.

Data flow for the Iron Mountain Connector is one-way.



2 Tutorials

A number of interactive video tutorials are available to demonstrate common features for Gimmal Physical. They can be found at the links below:

1. Interface Overview[35]
2. Importing Data[36]
3. Creating Users[37]*
4. Create & Update Records[38]
5. Printing Labels[39]*
6. Search Options[40]
7. Reporting[41]*
8. Requesting[42]
9. Transferring[43]
10. Security[44]*
11. Disposition
    a. Foundations of Disposition in Gimmal Physical[45]
    b. Disposition Process[46]

> *These tutorials are in the process of being updated to reflect the User Interface changes introduced in version in 4.0. In the meantime, while the data presented in the tutorials is accurate, the navigation may differ in later versions.

2.1 Older Tutorials

Topics related to pre-4.0 releases can be viewed at the following links:

1. Interface Overview[47]
2. Disposition[48]

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35. https://gimmal.navattic.com/qfa07yg
36. https://gimmal.navattic.com/21k01uy
37. https://gimmal.navattic.com/oy20a9r
38. https://gimmal.navattic.com/u3i0rzl
39. https://gimmal.navattic.com/ql108di
40. http://gimmal.navattic.com/k9i01uz
41. https://gimmal.navattic.com/nu20au5
42. https://gimmal.navattic.com/jot0733
43. https://gimmal.navattic.com/8hq0d19
44. https://gimmal.navattic.com/1u20k7y
45. https://gimmal.navattic.com/qjw0vxv
46. https://gimmal.navattic.com/mff0eh9
47. https://gimmal.navattic.com/cp106bd

3. Requesting[49]
4. Transferring[50]
5. Importing Data[51]
6. Create & Update Records[52]
7. Search Options[53]

48. https://gimmal.navattic.com/sa903wg
49. https://gimmal.navattic.com/gl10s6b
50. https://gimmal.navattic.com/hf10r69
51. https://gimmal.navattic.com/w910fdc
52. https://gimmal.navattic.com/iv10i5j
53. https://gimmal.navattic.com/yo201gc

3 Release Notes

Please use the tree view to select the version of Gimmal Physical and review the recent changes, enhancements and issues addressed for each release.

3.1 Note

Enabling certain new features may require fee-based professional services for advanced configuration and/or data transformations

3.2 Release Notes 4.1

This document refers to a version currently under development. Details will change before release.

3.2.1 New Features

3.2.1.1 Conditional Fields Improvements

3.2.1.1.1 Allow Conditional Fields to be Required

This feature adds the option for 'Required' to conditional field functionality. It allows administrators to choose Show, Hide, or make the option Required for each field value.

Note: It is permitted for Historical information to have no value, but, when 'Required' is enabled, day forward the selected values will be required.

3.2.1.1.2 Imports respect Conditional Field constraints

Values updated using imported files will now be validated. Items that do not respect the constraints of the conditional fields will be reported as erroneous.

3.2.1.2 Iron Mountain Improvements

3.2.1.2.1 Process Nightly History Reports

Gimmal Physical 4.1 includes the ability to process the Iron Mountain Nightly History reports to have confirmed validation of order placement, as well as improved reporting for orders with issues.

3.2.1.2.2 New Iron Mountain Request History Page

Added a searchable view that captures historical details of Iron Mountain requests, including requested by, submitted by, associated dates, and other helpful details.

3.2.1.2.3 Submit Special Instructions with Order

Allows users to include more specific delivery instructions when submitting their orders. Before an order is sent, these comments can be updated on the submit page for users with appropriate permissions.

3.2.1.3 Request Page Improvements

- Simplify the request page with a control to more easily select destinations.
- Add Special Instructions to all requests

3.2.1.4 Miscellaneous

- Modernize components
- Split field order for home page grid and display page
- Separate pass-down fields on the search page

3.2.2 Bug Fixes

ID	Description	Ticket #
102865	Issues with reports when view names are greater than 30 characters	00024922
102901	Forms Authentication password reset issue when expiration option enabled	00024940
104376	Audit Date history issues with regional settings changes	00025264
104431	Caption changes not propagating to Home Page Grid	00025472
104628	Searching displays data from other tabs under certain circumstances	00025566
104861	Export HPG Reports created multiple times with refresh of page	00025624
105290	Default Organizations can still be used after access restricted	00025832
104625	Issue printing certain reports when using Azure (Invoices, Reconcile)	00025585
104377	Transit information Field length too long error for O'Neil submissions	00025405
105436, 106042	Issues with Pattern Sequence Logic for padding, starting value null	00025740, 00026104
105727	Reason for Change field appears on Bulk Create page when it should not	00026005

3.2.3 General Availability

August 25, 2025

3.2.4 Note

This document refers to a version currently under development. Details may change before release.

3.3 Release Notes FileConnect 5.1

3.3.1 Bug Fixes

ID	Description	Ticket #
104133	Unable to transfer large files to Azure Blob Storage	00024777

3.3.2 General Availability

27 May 2025

3.4 Release Notes 4.0

3.4.1 New Features

3.4.1.1 Refreshed User Interface

The Gimmal Physical user interface has been refreshed for a more modern layout. Version 4.0 has a more intuitive navigation with features that include

- Expandable left tab menu that replaces top-level Tabs
- Administration and Preferences moved to the gear drop-down
- Left-hand Navigation for Preferences,
- New Page with updated options for Tabs
- Space-saving features like toggles for System and Legal Hold fields
- New Wait Spinner for button clicks

This refresh will serve as the baseline for continued improvements and modernizations to the UI design.

3.4.1.2 Workflow Disposition

The disposition process has been significantly improved to facilitate multi-level processes with new features to ease the management of records disposal. This includes:

3.4.1.2.1 Support of Workflow Process

The flexibility of workflow steps has been leveraged as part of the new method for creating a disposition process. This includes options such as:

- Parallel or sequential approval steps
- Implied or explicit approvals

- Custom disposition notices, including editable emails and reminders
- Assigning workflows to Record Schedules

3.4.1.2.2 New Dashboard Page

Users and Admins now have a one-stop place to see items relevant to them. Now available are stage-specific links that navigate directly to items in the Home Page Grid that are assigned to the user. Record managers have their own set of queries to pinpoint the items awaiting disposition.

3.4.1.2.3 Separate Page for Disposition Decisions

A new page dedicated to approvals and rejections can be reached from the new dashboard queries or directly from the Home Page Grid. It has its own security rights with added features such as notes on approvals and an optional email address for additional verification once the job is complete.

3.4.1.2.4 Improved Retention Page

Options have been added to the Retention Page to make the disposition process even more efficient. They include:

- Choice to promote undisposed items from previous batches
- New Filter option for Record Schedules
- Alternate description for new batches

3.4.1.2.5 Other Disposition Improvements

Other disposition improvements have been added, including:

- Clearing of batch numbers and descriptions from records in bulk

3.4.1.3 Miscellaneous Improvements

- Iron Mountain Updates
  - The connector allows multiple log-ins
  - Department and Division are now children of Customer
- Alternate Contact Information for requests
- Carry-over fields now include locations for new container items
- Improved management of caption changes
- New views to offer flexibility in report creation for the implementation team
- Refresh data entry pages from the web interface
- Improved pass-down field support
- On-premises Enhancements:
  - Improved support for Azure SQL
  - Streamlined installer

3.4.2 Bug Fixes

ID	Description	Ticket #
99652	Sequencing for the position of a file within a box is not working	00024266
99415/97036	Intermittent issues with notification emails	00023333
96056	Update SQL for non-standard database needs	00022931
95533	Schedule scope configuration can cause errors to be thrown	00022520
96025	The Secured List caption is incorrect for Bulk Update	00022917
96024	No cascade update when Event Code changes	00022922
96187	Disposition Notices tab treating eDoc control as required	00022953
97333	Many-to-Many Import Performance Issue	00023278
98443	PortableConnect issue installing APK for Android 13/14	00023795
97273	Conditional Field display filter on imports	00023466
97386	Permission issues related to Advanced Field Display	00023421
96474	Incorrect Disposition Link	00023107
96607	Pattern Sequence reusing numbers in certain situations	00023149
97879	Field caption changes are not being applied to pass-down fields	00022990
97374	Inconsistent Field Display for Compound Fields	00023474
1012379	Issues with updates to the Reason for Update fields	
96056	Non-standard item types can experience issues with SQL updates	00022931
98064	Detailed Search Error when OSV is queried	00023781

ID	Description	Ticket #
98066	Iron Mountain Values are not adding because of spaces	00023784
97848	O'Neil deployment issues with Azure	00023677
98817	Log files do not account for all rows in the import with duplicate keys	00024011
98447	Issues with hard-coded paths when load balancing	00023674
96630	Return to Login with direct URL w/ SSO	00023198
97172	Issue with Claim Type Fields in SSO authentication	00023260
102221	Exporting an entire query does not respect list security	00024768
103674	Revise the report file to have all columns on a single page	n/a
104060/ 103998	Invalid Column Name errors with certain views	00025122/ 00025163
104059	Frozen Request Screen for Delivery Actions	00025287
103681	SQL error with duplicate quick descriptions for Users	n/a
104491	JavaScript Error on Advanced Retention Page	00024935
104715	Edit report page not allowing the file to be uploaded	n/a

3.4.3 General Availability

April 17, 2025
refreshed May 15, 2025 & June 16, 2025

3.5 Release Notes 3.15.2

3.5.1 Bug Fixes

ID	Description	Ticket #
96606	Pattern Sequence reusing numbers above 100 items	00023149
96671	Duplicate Item history in certain circumstances	00023058
96670	Direct URL with SSO returns to login screen	00023198

3.5.2 General Availability

11/12/24

3.6 Release Notes PortableConnect for Android 13 or 14

3.6.1 New Features

3.6.1.1 PortableConnect

The PortableConnect utility for use with Zebra TC5x scanners can now support Android 13 or Android 14.

3.6.2 Known Issues

ID	Description
	Neither RFID or Bluetooth is supported in this version.

3.6.3 General Availability

October 22, 2024

3.7 Release Notes 3.15.1

3.7.1 New Features

3.7.1.1 Request Page Updates

Improvements have been added to the Request Pages including:

- Added a 'Query Request on Home Page' button. This helps users verify the property of the records with the additional detail found on the Home Page Grid.
- Streamlining the Request Page Quick Search and making it consistent with the column headers for more effective searching.
- Interface updates include:
  - Adding a setting to determine the number of rows for pagination
  - Removing unneeded links
  - Update style for 'View Request History'

3.7.1.2 Refile Request Updates

The page for requesting pick-ups and deliveries has been improved to allow more fine-tuned control over individual items. Enhancements include:

- Adding support for multiple concurrent storage vendors including on-prem, Iron Mountain, and O'Neil based Record Centers
- Add options to apply location changes to selected or all items
- Warnings added to the destinations changing from one type to another (e.g. off-site to on-prem)

3.7.2 Product Enhancements

Features listed in this section may require fee-based professional services for advanced configuration and/or data transformations.

3.7.2.1 Improved O'Neil Connector

A new and improved O'Neil Connector will allow Gimmal Physical a direct connection to O'Neil's Bridge Rest API. By automating the request and reconciliation process with Record Centers that support O'Neil Bridge, Records Managers will eliminate double work and maintain a single system of record. With the correct credentials, Metadata and transit information are synced with the Record Centers. Transfers are processed instantly and the status of the work orders is updated automatically.

3.7.2.2 Updates to Iron Mountain Integration

A series of improvements have been added to the Iron Mountain configuration, request, and transfer pages.

3.7.3 Bug Fixes

ID	Description	Ticket #
87577	Long column names combined with a large number of column fields (>3,000 characters) cause searches to fail	00018928
87612	Previous history table entry incorrectly duplicated when the subsequent reason for the change is not required	00018853
91698	Pickup Format for the Iron Mountain file is incorrect	00020847
90958	Permissions for the Submit button (connector-based Requests) not enabled	00020638
82183	Excessive field names (>1024 characters) cause export failure	00016692
94889	Multi-field updates not stored in Audit History	00022276
87454	Item History descriptions are not set until the history is viewed	00018707
84990	Current Container Quick Description update lag with dynamic changes	00017235
94423 /94580	FileConnect: Auto-import issues with service error preventing import	00022080 / 00022060
95184	Billing for storage does not take into account the previous year's data	
93605	Circulation History invalid when security right removed	
93819 / 92631 /93617	End-of-month invoice data records are not being created in certain circumstances	00021709
94572	Bulk Create throws an error when an INT field is on the page	00022185

ID	Description	Ticket #
95525	Unique fields do not appear on the Bulk Update page if multiple fields are used	00020689

3.7.4 Known Issues

ID	Description
91349	Links for 'Create a New File for' and 'Create a New Box for' are missing on 'View Records Schedule' if opened from the 'View > Record' menu selections

3.7.5 Removals

ID	Description
93707	Remove obsolete View Request Reconciliation option from view requests pages

3.7.6 General Availability

July 29, 2024

3.7.7 Release Notes 3.15.1 Hotfixes

Pease contact the Gimmal Support team for access to a specific hotfix.

Not all items are available for all 3.15.1 customer deployments.

3.7.7.1 Features & Fixes

ID	Description	Ticket #	Available
97244	Issues with the Conditional Field display filter on imports	00023466	10/29/2024
98063	Detailed Search Error when OSV is queried	00023781	12/12/2024
98067/ 98585	Iron Mountain Issues	00023784	12/12/2024

ID	Description	Ticket #	Available
98425	The Iron Mountain page is not displaying the saved ftp address	00023893	12/12/0224
98214	Barcode length and Account code issue (O'Neil)		12/12/2024
97931/97838/98366/97937	O'Neil deployment issues	00023677	12/12/2024
101702	Issues with Azure On-Prem	00024613	3/7/2025
102038	Alternate Contact Information for Off-Site Transfers		3/17/2025
103996	Shelf Data removed from role, still see in report	00025308	5/15/2025
103851	Separate pass-down fields from Organization and Records Schedule when creating the search page	00024626	5/15/2025
103847	Set the accession when the current location is a hub location	00025229	5/15/2025
104276	Audit Date history issues	00025264	5/23/2025
104290	REST Changes to support large file uploads	00024777	5/27/2025
105136	Add circulation history to screen for fulfilling requests	00025743	7/7/2025
104992	Updated interchange (temp) path to make path configurable	00025625	7/7/2025
105167	Fixed link to view eDocs on export page	00025754	7/7/2025

3.8 Release Notes 3.15

3.8.1 New Features

3.8.1.1 Portable Transfer Improvements

Several enhancements have been added to optimize data transfers from portable barcode scanners. These include:

- Optional rules for processing barcodes, including:
  - Removing or adding prefixes or suffixes
  - Replacement of unwanted characters
  - Limit barcode length
- Performance and logging improvements
- Options for preview and analysis of files before transfer
- Email notification and summary of completed transfers
- Ignore the transfer of items that have been deleted

3.8.1.2 Circulation History

This new version of Gimmal Physical has added options to manually log and audit additional steps in the process of routing a transferred item to or from its final destination. When enabled, this new record consists of a user-updated entry appended to the transfer, which is then stamped with key details. These entries are included in the item history for auditing purposes.

3.8.1.3 Synonym Searching Options*

This feature is useful for finding key pieces of data that have alternate designations. For example, you may have problems finding a product known by multiple names in different regions, or if you have a locality name that is often shortened or abbreviated. Synonyms help resolve this issue by returning each of the variants when searching for one. The list of alternative terms is designated and controlled by your team as either a separate tab or a list of values.

3.8.1.4 Pattern Sequences*

This new option automatically creates a field for a newly created item based on the values of other fields and a pre-defined sequence. For example, you can use this new Pattern Sequence to create a box name that includes an organization code and a sequential number. It even allows you to have a separate sequence for different organizations.

3.8.1.5 Many-to-Many Controls Enhancements*

Features have been added to extend functionality to 'Many to Many' controls, which were previously unavailable. The 'Many to Many' controls allow users to select and modify data where fields have a many-to-many relationship. Examples include assigning multiple boxes to multiple organizations (also users or departments from either the boxes or organizations tab.

- **Add Carryforward Options**
  This functionality extends to the many-to-many controls and the ability to use fields in a selected record as the basis for the default values in any new record subsequently created.
- **Mirrored Searches**
  This enhancement allows the searching of records from either tab (e.g., boxes or organizations) that contains the relationship for the many-to-many control.

- **Mirrored View, Add, Update, and Remove functionality**
  From either tab in a many-to-many control relationship, and with the correct permissions, users can now perform any CRUD operation from either tab, linking the records.
- **Export Many-to-Many fields controls**
  Values stored in many-to-many relationships can now be exported in a format that matches the import options.

3.8.1.6 Actual Destruction Date Improvements

Multiple enhancements have been added to expand the functionality of Actual Destruction Dates. This date will now appear on the Certificate of Destruction, and user-entered Actual Destruction is supported with several options to address the most common use cases.

3.8.1.7 Choice for Scheduled Destruction Date Processing*

Administrators now have the option to calculate disposition dates dynamically or as a nightly job service. If enabled, this option can prevent timeouts when processing large sets of data.

3.8.1.8 UI Improvements*

- **Reorganize Admin Page**
  The administration page has been reorganized into logical groups to make finding options more efficient.
- **Session Clock**
  An option is now available that allows users to see how much time is left before their current session expires.
- **Concatenated Text Box***
  This feature was added to make it easier to view and search fields where multiple values can be selected.
- **New Cart Options**
  The ‘Add to Cart’ feature has been expanded by allowing users to add an entire set of results to the cart rather than needing to go page by page.
- **Additional Action Button Options**
  Users can now leverage the ‘Configure Action Toolbar’ to hide action buttons or change most action button captions.
- **CSV as Export Option**
  The home page grid exports now allow a choice between .txt and .csv export formats.

3.8.1.9 Background Jobs Table Management

An option has been added to the Application Settings to regulate the number of days entries are kept in the Background Jobs history table. The default is now 30 days, but this can be adjusted or disabled. Clearing out the background jobs history table regularly will help to improve performance for actions that take place as part of a background service.

3.8.2 Bug Fixes

ID	Description
88795	Date format issue on Export (00019612)
89098	Iron Mountain Box Request Pickup issue(00019723)
89049	Iron Mountain multiple request headers (00020049)
90229	Errors updating electronic documents (00020206)
89782	Error in conditional field display with removed value (00019973)
90722	Records Schedule Organizational Control not using carry-over values (00020377)
90908	Issue when disposition items were not referencing the records table (00020483)
91207	SQL Timeout issues with Billing (00020785)
91281	Invalid box size constraint (00020897)
90722	Carryover value not used for Organizational Control on Record Schedule (00020377)
90983	Addressed an issue with extra columns in Space Management
90063	Application Log load errors with certain configurations
90568	Bulk update issue when changing the Laserfiche folder
89996	Invalid headers showing for non-licensed component
91658	Installer validation issues
91386	Missing confirmation page for Iron Mountain

3.8.3 Known Issues

ID	Description
96061	Installer Error with automatic DB Creation when non-standard regional dates are used.

3.8.4 General Availability

April 29th 2024

3.8.5 Note

*Enabling certain features may require advanced configuration in conjunction with fee-based professional services.

3.9 Release Notes 3.14

3.9.1 New Features

3.9.1.1 Disposition Enhancements

- **Retention Schedule Scope**
  Administrators can now configure the scope of a retention schedule to limit or expand access based on the chosen hierarchical organizational level.

3.9.1.2 Additional Actions

- **Permanent Withdrawal**
  New options for Permanent Withdrawal and Permanent Withdrawal and Delete have been added to the Alternate Fulfilment Method to allow items to be permanently moved (i.e. deaccessioned) outside the system of record.
- **Bulk Create**
  This feature assists in creating multiple records at once by maintaining identical default details over a configurable number of new records while giving each a new barcode.

> **Note**: Automatic barcode creation must be enabled in Gimmal Physical for this feature to function correctly.

- **Box Lockdown**
  An optional setting has been added, allowing boxes to be locked down when transferred to a hub location. This helps to prevent unwanted changes to an item when it is in a location that is designated as a hub.

3.9.1.3 Billing Improvements

A number of options have been added to better support organizations that charge for storage.

- **Hierarchical Billing**
  For customers who have multi-level organizations, charges can now be aggregated at various levels of the hierarchy, allowing you to pinpoint the level of the organization that should be billed.
- **Assessment of Storage Charges**
  This option gives administrators more control over billing by offering a choice to track items stored in hub locations on a daily or monthly cadence. This adds precision to analyzing, invoicing, and reporting of charges.

3.9.1.4 Search Options

- **Find Empty Containers**
  Options have been added to the Advanced Query screen for container items (e.g. boxes, shelves) which allow users to query for empty items. This includes those that have no associated content, those with checked-out associated content, and those with deleted associated content.

3.9.1.5 User Interface Updates

- **Updated Help Link**
  Continually updated online documentation and guides can now be directly accessed from the application Help button[54], replacing the static context-specific help.

  Administrators can now directly link their own documentation via the Admin Settings page.
- **Increase Records per Page Limit**
  New preference options (200, 500) have been added to the Records per Page limit.
- **Improved Validation for Range Fields**
  To assist with reducing data entry errors, additional checks have been added to range fields to make sure the values entered do not violate range field constraints.

54. https://docs.gimmal.com/gp/

- **Refresh Branding**
  The color scheme and logos have been refreshed to reflect updated Gimmal branding.

3.9.2 Bug Fixes

ID	Description
85040	Request comments don't handle special characters
87122	Date calculations do not account for deleted files
88098	Add option to avoid Auto SDD file updates issues with certain scenarios (00017425)
82763	Updates to list values not captured fully in Application History (00016656)
87980	Error searching home page grid with no valid data
88381	Caching issues with services (00019295)
88203	Issues with views when organization is not selected (00019120 & 0019122)
87638	Improper restriction of excessive authentication attempts
87124	Logic Error in creation of home page grid view (00018662)
89003	General Record Schedules not showing without User rights to organization (00019672)
88974	Error trying to submit filter requests to Iron Mountain (00019715)

3.9.3 Known Issues

ID	Description
888329	‘Bulk Create' missing from 'Choose Action’ list in Notification event.
	To see ‘Verbose’ logging in the Application Log, the Gimmal Physical Service will need to be restarted.

3.9.4 Removals

ID	Description
n/a	Range fields will no longer support comma delimited lists as values. For example, a value of ***1-8, 11-19, 22-34*** can no longer be used in a range field.

3.9.5 General Availability

December 11th 2023

Note: Enabling certain features may require advanced configuration in conjunction with fee-based professional services.

3.10 Release Notes 3.13.2

3.10.1 New Features

3.10.1.1 Job Services Updates

The job services for Gimmal Physical have been updated to use alternate logging and retry mechanisms to improve stability of the product.

3.10.2 Bug Fixes

ID	Description
87159	JobQueue Sender exceptions cause service to stop working (00018585)
86665	Set Defaults button causes loss of sort priority items (00018147)
86666	Cannot update list items if list names contains ‘ID' (00018155)
87008	Export of Item History doesn’t handle CRLF (00018327)
86789	Search Preference not propagating to home page (00018223)
86976	Yesterday, Today and Tomorrow date filter future schedule issues (00018280)

3.10.3 General Availability

August 11, 2023

3.11 Release Notes 3.13.1

3.11.1 New Features

3.11.1.1 Filter Dispositions by Location

This optional feature allows retention batches to be further filtered by location to help make the disposition process more flexible.

3.11.1.2 Validate and Restrain Date Fields on Import

This optional feature, set at configuration time validates dates against a set of rules for both the UI and Import:

- ‘Date To’ so it cannot be a future date
- ‘Cut-off date’ cannot be less than ‘Date To’
- ‘Date From’ cannot have a value higher than 'Date To.

3.11.1.3 Import into Many to Many Control

This feature allows users to leverage the quick description to import data into tables where fields have a many-to-many relationship. This expands the importing process to include multiple boxes to organizations, users, departments and more.

3.11.1.4 Calculate Box Scheduled Destruction Date for Files with Empty Dates

This feature will handle the recalculation of Scheduled Destruction Dates for boxes by setting the box destruction date to remain empty if any file within the box does not have a destruction date. This will work when files are added, updated or removed from a box.

3.11.1.5 Please Note:

Starting with the 3.13.1 release, Gimmal Physical will only support import files with UTF-8 encoding.

3.11.2 Bug Fixes

ID	Description
83359	Importing items removes non-English characters in certain conditions (000161722)

ID	Description
83319	Importing not properly reading file encoding type (000161722)
84125	Accession Date update with create at Home Location not working as expected (00016793)
82645	Box transfers done through Bulk Update do not audit the transfer (00016886)
85933/85918	Excel report issues

3.11.3 Removals

ID	Description
83359	Removed the option "Remove Unprintable Characters" from the Import screen as part of a fix. This functionality will be covered with the requirements for UTF-8 encoding. Any characters not covered under that encoding will force an import error captured in the logs.

3.11.4 General Availability

June, 26, 2023

3.12 Release Notes 3.13

3.12.1 New Features

3.12.1.1 Access Unify Integration

Gimmal Physical now supports automated integration with Access Total Recall system via the Access Unify APIs. This feature will allow customers to use a single system, Gimmal Physical, to request boxes for transfer, delivery or refile stored in an Access warehouse.

3.12.1.2 Gimmal Records Connector

Gimmal Physical can now interact directly with Gimmal's popular electronic record management system, Gimmal Records. This feature allows record schedules from Gimmal Records to be automatically populated in Gimmal Physical with the click of a single button. It is the start of a seamless integration between the two products.

3.12.1.3 Record Schedule option: 'Days'

To complement the existing time-based values, new record schedules can now be created using days as a value to calculate scheduled destruction date.

3.12.1.4 Nightly Report Enhancements

This version improves the ability to schedule reports during off hours, email them to designated users and filter report result sets. It also allows for larger datasets while simplifying deployment and maintenance.

3.12.1.5 Background Improvements

A number of behind-the-scenes changes are included in this release which are designed to streamline the setup and performance of Gimmal Physical. Although these changes will be mostly transparent to an admin or end-user, these changes improve the stability and performance of the product. Updates include a new installer, reusable data entry pages, a new background service, new index methodology, improved logging and more.

3.12.2 Bug Fixes

ID	Description
82246	Issue changing password in reset password page with user generated barcodes
82691	Bulk Delete and Bulk Undelete issues with larger (>2000) datasets

3.12.3 Known Issues

ID	Description
	Upgrades to Gimmal Physical 3.13 must be done from Gimmal Physical version 3.12
85933	Excel Reports will not download (on-prem)
85918	Activity Summary cannot export to Excel
85393	Nightly reports are in UTC, but reports are in local time
83359	Automated import removes some standard non-English characters

ID	Description
83319	Importing not properly reading file encoding type

3.12.4 General Availability

04/28/2023

3.13 Release Notes 3.12

3.13.1 New Features

3.13.1.1 Ability to relate Record Series to many Organizations

When creating or updating Record Series records an association can be made whereby the Record Series is related to many Organizations.

3.13.1.2 Request functionality enhancement providing the ability to create and request the contents of a container

When performing a request, the user now has the option to create and request contents of the record instead of the record itself.

3.13.1.3 Report enhancements

Hierarchical location information added to Picklist and Refile reports.

3.13.1.4 Improved style sheets for Largelist control

Updated cascading style sheets data display in the large list control for a more elegant presentation.

3.13.1.5 Improved auto-calculation of container Scheduled Disposition Date

Updated logic provides for the setting of the Scheduled Disposition Date on containers based on the contents.

3.13.1.6 Search page enhancement when conditional fields are present

Fields that are hidden due to conditional field display are now hidden on the Detailed Search page until a selection is made from the list that controls conditional field display.

3.13.1.7 Single Sign On configuration enhancement

Logic added to the user interface that allows clients to specify what fields of information will be inherited from the sign on authority.

3.13.1.8 Improve tracking history for large data sets

Logic added to streamline the tracking of multiple items in many to many controls which point to other tabs.

3.13.2 Bug Fixes

ID	Description
69703	Current and Home location fields were added to the list of available fields in the Duplicate Search page.
69861	Right was added so that Portable Reconcile and Portable Transfer are using the same security right.
70094	Printing the results of a Global Search will now result in the same values being returned as are present in the gird.
70231	Advanced query descriptions issue was fixed where an error could be thrown if the underlying list value or tab value had been deleted.
71069	Cascade updates now update entire query instead of using preference maximum row count.
71769	Hiding a tab in the application when it is related to a tab on which disposition can be run will no longer throw a null reference error.
71807	Fixed issue in Expunging Supply Item Requests.
72323	Issue addressed where calendar controls for secured date fields were visible on data entry pages.
72758	Fixed the issue with setting default values for Current or Home locations on the create page on a tab.
72962	Fixed issue where history record was not written when the values being updated were greater than 4000 characters in length.

ID	Description
73067	Spurious error message related to Organization no longer logged when attempting to login using single sign on authentication.
73098	Organizational security now applied to the Organizational reports.
73179	Request Fulfillment page updated to prevent history from being written multiple times when requests are fulfilled.
73151	Right added control the deletion of system access records. Deleting system access records now captured in application history.
73395	Issue fixed where imports were not recording location changes when they were accomplished via an update import.
73448	Requests to post files to the Iron Mountain ftp site are now done in the same separate thread thus preventing deletion of files prior to them being posted.
73555	Issue addressed where Organizations that contain invalid characters if used in a file name will not cause an issue when generating invoices.
74106	Removed label that contained incorrect information on the Location Popup control. A location needs to be selected - a barcode cannot be entered in this control.
77821	Spelling fixed in application setting for Import and Report file extensions.
77922	Code updated to account for Event based changes to Records Schedules so that associated items are updated when Event is updated.
78033	Stale page Resource File Editor removed to prevent cross site scripting vulnerability.
79023	Simplify license features in UI.

3.13.3 General Availability

11/17/22

3.14 Release Notes 3.11

3.14.1 New Features

3.14.1.1 Legal Application Support

The configuration tool now fully supports the creation of a Legal application with default tabs for Client, Matter, Practice Codes, and Offices.

3.14.1.2 After Hour Record and Index Processing

Application setting added whereby full text tables can be upd ated and index maintenance applied in off hours.

3.14.1.3 Column Freezing for Home Page Grid

The first two columns in the home page grid are set to be “sticky” – allowing the user to scroll to the right and still select the record.

3.14.1.4 Event Based Retention Schedules

List management setting added that allows users to add month/day values for event codes.

3.14.1.5 Support for Large Digital Files

Cloud customers now have an application setting added for the ability to store temporary files in an alternate folder location. Adds support for uploading larger digital content files (>200-250MB).

3.14.2 Bug Fixes

ID	Description
60021	Fixed import log pagination issue.
63359	Log file now uses UTC time to store event date and is displayed correctly based on location of user.
65151	Resolved the clear row issue with Advanced Query
65029	Fixed issue with Export tool tip not showing correctly

3.14.3 General Availability

02/03/2022

3.15 Release Notes 3.10

3.15.1 New Features

3.15.1.1 Iron Mountain integration

Iron Mountain integration is now fully supported. Previously, the integration was custom work for each implementation. Gimmal Physical allows requests, transfer, and returns of boxes stored in Iron Mountain.

3.15.1.2 Laserfiche integration uses SDK 10

Gimmal Physical now supports version 10 of the Laserfiche SDK. Previously (the Infolinx releases) only supported version 9. In addition, the configuration page for Laserfiche was updated so that it is more intuitive and shared fields are displayed with the correct caption.

3.15.1.3 Permanent retention schedule

The ability to create schedules that are permanent, which prevents related items from getting a scheduled destruction date.

3.15.1.4 History presentation

The presentation of tab history was updated. A new column was added that details updated from and to column data in a more user-friendly fashion. History exports and reports now also respect any sorting that was performed on the page.

3.15.1.5 Space Management calculations on home or current location

A parameter has been added to application configuration page that allows space management to be calculated on either home or current location.

3.15.1.6 Command timeout

The database command timeout is now exposed on the application settings page.

3.15.1.7 Performance

- Reports are generated out of process in either a separate thread in IIS or in Hangfire.
- Improve search performance on the home page grid, global search, and quick search.

3.15.2 Bug Fixes

ID	Component	Description
56319	Web Application	System date fields are displayed correctly in the tooltip in the home page grid.
58521	Laserfiche	Shared multiline fields no longer cause an issue when creating linked records. Records can be declared in the root folder without issue.
58520	Web Application	Can no longer go to the undelete page for records that are not deleted.
N/A	Web Application	Logical parent labels will no longer be shown if the field is not visible.
57273	SSO	Username as a property in profile objects will no longer cause an error. Proper parsing of the value has been added.
54752	Web Application	Field search now correctly searches related parent fields.
55321	Web Application	User default values now used for resource entries, and no longer writing them to log.
53855	Web Application	Time display is now correct on import log page.
55736	Web Application	Hidden fields are no longer displayed in global search.
55954	Web Application	Non-numeric shelf size or capacity in space management are no longer allowed.
56899	Web Application	Undeleted option is no longer available for records not deleted.
54065	Web Application	Users are no longer able to create records on a record schedule if they don’t have appropriate permissions.
56237	Web Application	Button color has been corrected on drop zone for digital content management.
59347	Web Application	Fixed issue where the Last Modified Date of a Box gets set to the exact Date/Time of the Disposition Approval action if a singular Update is used but does not get set correctly during a Bulk update on the Disposition Approval.

ID	Component	Description
59348	Web Application	Update modify date when multi-select value is changed.
54702	Rest Services	Resolved SSO not working due to time zone differences.
54715	Web Application	Resolved the wrong time displayed for hover text for datetime fields.

3.15.3 Known Issues

ID	Description
64971	Reports cannot be run from the dashboard. Workaround is to run reports from the reports page instead of the dashboard.
65151	Advanced Query Clear Row button does not clear the selected row.

3.15.4 General Availability

10/20/2021

3.16 Release Notes 3.09

3.16.1 User Interface Updates

The web application has been rebranded to reflect Gimmal color palette and logos.

3.16.2 New Features

3.16.2.1 Conditional Field Display

Altered logic so that all fields governed by conditional list values are hidden until a value is selected from the list driving conditional field display.

3.16.2.2 Intelligent barcode field

Added ability to add pre or post filled auto/manual barcode fields to tab that will respect display order.

3.16.3 Known Issues

ID	Component	Description
55321	Web Application	User default values for missing resource entries.
54752	Web Application	Keyword search will work as “Wildcard Behavior” by default when doing keyword searches.
54702	REST Services	SSO not working due to time zone differences. Additional parameter is required.
54751	Web Application	Hover text for datetime fields is not using correct offset causing wrong time to be displayed.
53855	Web Application	Time display is incorrect on Import log page.
55736	Web Application	Hidden field are displayed when doing a global search.
55954	Web Application	Non-numeric shelf size or capacity in space management should not be allowed.
56899	Web Application	Records that are not deleted still show undelete option on menus.
54065	Web Application	Large list control may still allow CRUD operations when user is view only.
57273	Web Application	SSO will generate error when “username” is passed into the username parameter.

3.16.4 General Availability

4/13/2021

4 Legacy Documents

The documents below are included for reference, but do not reflect current versions of the product. Unless otherwise noted, these documents include Product Release Notes and User Guides last updated for 3.12. For up-to-date Release Notes, please visit the Release Notes[55].

4.1 Release Notes and Installation Guides

- Release Notes v3.12[56]
- Release Notes v3.11[57]
- Release Notes v3.10[58]
- Release Notes v3.9[59]
- Technical Installation Guide[60]

4.2 Old Infolinx (former name of Gimmal Physical) Release Notes

- Release Notes Infolinx 3.8[61]
- Release Notes Infolinx 3.7[62]
- Release Notes Infolinx 3.6[63]

55. https://docs.gimmal.com/gp/release-notes
56. https://gimmal.atlassian.net/wiki/download/attachments/1703950/Gimmal%20Physical%203.12%20Release%20Notes.pdf?api=v2&cacheVersion=1&modificationDate=1668562743819&version=1
57. https://gimmal.atlassian.net/wiki/download/attachments/1703950/Gimmal%20Physical%20Release%20Notes%203.11.pdf?api=v2&cacheVersion=1&modificationDate=1643886033780&version=5
58. https://gimmal.atlassian.net/wiki/download/attachments/1703950/Gimmal%20Physical%20Release%20Notes%203.10.pdf?api=v2&cacheVersion=1&modificationDate=1634730613543&version=5
59. https://gimmal.atlassian.net/wiki/download/attachments/1703950/Gimmal%20Physical%20Release%20Notes%203.9.pdf?api=v2&cacheVersion=1&modificationDate=1623754867307&version=1
60. https://gimmal.atlassian.net/wiki/download/attachments/1703950/GP%20Technical%20Users%20Installation%20Guide.pdf?api=v2&cacheVersion=1&modificationDate=1677008168023&version=3
61. https://gimmal.atlassian.net/wiki/download/attachments/1703950/Infolinx%20Product%20Release%20Notes%20-%203.8.0.pdf?api=v2&cacheVersion=1&modificationDate=1698333849115&version=1
62. https://gimmal.atlassian.net/wiki/download/attachments/1703950/Infolinx%20Product%20Release%20Notes%20-%203.7.0.pdf?api=v2&cacheVersion=1&modificationDate=1698333826803&version=1
63. https://gimmal.atlassian.net/wiki/download/attachments/1703950/Infolinx%20WEB%20Release%20Notes%203.6.pdf?api=v2&cacheVersion=1&modificationDate=1698333797188&version=1

- Release Notes Infolinx 3.5[64]
- Release Notes Infolinx 3.4[65]
- Release Notes Infolinx 3.3[66]
- Release Notes Infolinx 3.2[67]

4.3 Admin and User Guides

- Administrators Quick Start Guide[68]
- General Uses Quick Start Guide[69]
- File Room Users Quick Start Guide[70]
- PortableConnect[71]
- RFIDConnect[72]
- ScannerConnect[73]
- FileConnect[74]
- Space Management[75]
- Billing[76]

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64. https://gimmal.atlassian.net/wiki/download/attachments/1703950/Infolinx%20WEB%20Release%20Notes%203.5.pdf?api=v2&cacheVersion=1&modificationDate=1698333753177&version=1
65. https://gimmal.atlassian.net/wiki/download/attachments/1703950/Infolinx%20WEB%20Release%20Notes%203.4.pdf?api=v2&cacheVersion=1&modificationDate=1698333733589&version=1
66. https://gimmal.atlassian.net/wiki/download/attachments/1703950/Infolinx%20WEB%20Release%20Notes%203.3.pdf?api=v2&cacheVersion=1&modificationDate=1698333717866&version=1
67. https://gimmal.atlassian.net/wiki/download/attachments/1703950/Infolinx%20WEB%20Release%20Notes%203.2.pdf?api=v2&cacheVersion=1&modificationDate=1698333700407&version=1
68. https://gimmal.atlassian.net/wiki/download/attachments/1703950/Administrators%20Quick%20Start%20Guide.pdf?api=v2&cacheVersion=1&modificationDate=1670015003349&version=3
69. https://gimmal.atlassian.net/wiki/download/attachments/1703950/General%20Users%20Quick%20Start%20Guide.pdf?api=v2&cacheVersion=1&modificationDate=1670038190384&version=1
70. https://gimmal.atlassian.net/wiki/download/attachments/1703950/File%20Room%20Users%20Quick%20Start%20Guide.pdf?api=v2&cacheVersion=1&modificationDate=1670038585469&version=2
71. https://gimmal.atlassian.net/wiki/download/attachments/1703950/Portable%20Connect.pdf?api=v2&cacheVersion=1&modificationDate=1678233893422&version=2
72. https://gimmal.atlassian.net/wiki/download/attachments/1703950/RFID%20Connect.pdf?api=v2&cacheVersion=1&modificationDate=1670040723695&version=1
73. https://gimmal.atlassian.net/wiki/download/attachments/1703950/ScannerConnect.pdf?api=v2&cacheVersion=1&modificationDate=1670042019338&version=2
74. https://gimmal.atlassian.net/wiki/download/attachments/1703950/FileConnect.pdf?api=v2&cacheVersion=1&modificationDate=1670041278241&version=3

- Iron Mountain Integration[77]
- Laserfiche Integration[78]

4.4 Technical Guides

- Technical Specifications - Cloud[79]
- Technical Specifications - On-Prem[80]
- Security Model Overview[81]
- Technical Users Installation Guide[82]
- Gimmal Physical REST Services[83]

4.5 Complete Help Guide

- Gimmal Physical Legacy Help (see page 328) (3.13.x to 3.15.x)

4.6 Legacy Help Guide 3.13.x to 3.15

- (Legacy Help) Guides (see page 329)
- (Legacy Help) Tutorials (see page 562)
- (Legacy Help) Release Notes (see page 563)

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75. https://gimmal.atlassian.net/wiki/download/attachments/1703950/Space%20Management.pdf?api=v2&cacheVersion=1&modificationDate=1670042652780&version=2
76. https://gimmal.atlassian.net/wiki/download/attachments/1703950/Billing.pdf?api=v2&cacheVersion=1&modificationDate=1670015764804&version=2
77. https://gimmal.atlassian.net/wiki/download/attachments/1703950/Iron%20Mountain.pdf?api=v2&cacheVersion=1&modificationDate=1670043162920&version=1
78. https://gimmal.atlassian.net/wiki/download/attachments/1703950/Laserfiche%20Integration.pdf?api=v2&cacheVersion=1&modificationDate=1658769035022&version=2
79. https://gimmal.atlassian.net/wiki/download/attachments/1703950/GImmal%20Physical%20Technical%20Specifications%20Cloud.pdf?api=v2&cacheVersion=1&modificationDate=1680270936104&version=2
80. https://gimmal.atlassian.net/wiki/download/attachments/1703950/Gimmal%20Physical%20Technical%20Specifications%20-%20On-Prem.pdf?api=v2&cacheVersion=1&modificationDate=1670359427042&version=1
81. https://gimmal.atlassian.net/wiki/download/attachments/1703950/Gimmal%20Physical%20Security%20Model%20Overview.pdf?api=v2&cacheVersion=1&modificationDate=1670360745504&version=1
82. https://gimmal.atlassian.net/wiki/download/attachments/1703950/Gimmal%20Physical%20Technical%20Users%20Installation%20Guide.pdf?api=v2&cacheVersion=1&modificationDate=1670363071410&version=1
83. https://gimmal.atlassian.net/wiki/download/attachments/1703950/Gimmal%20Physical%20REST%20Services.pdf?api=v2&cacheVersion=1&modificationDate=1670426361312&version=1

4.6.1 (Legacy Help) Guides

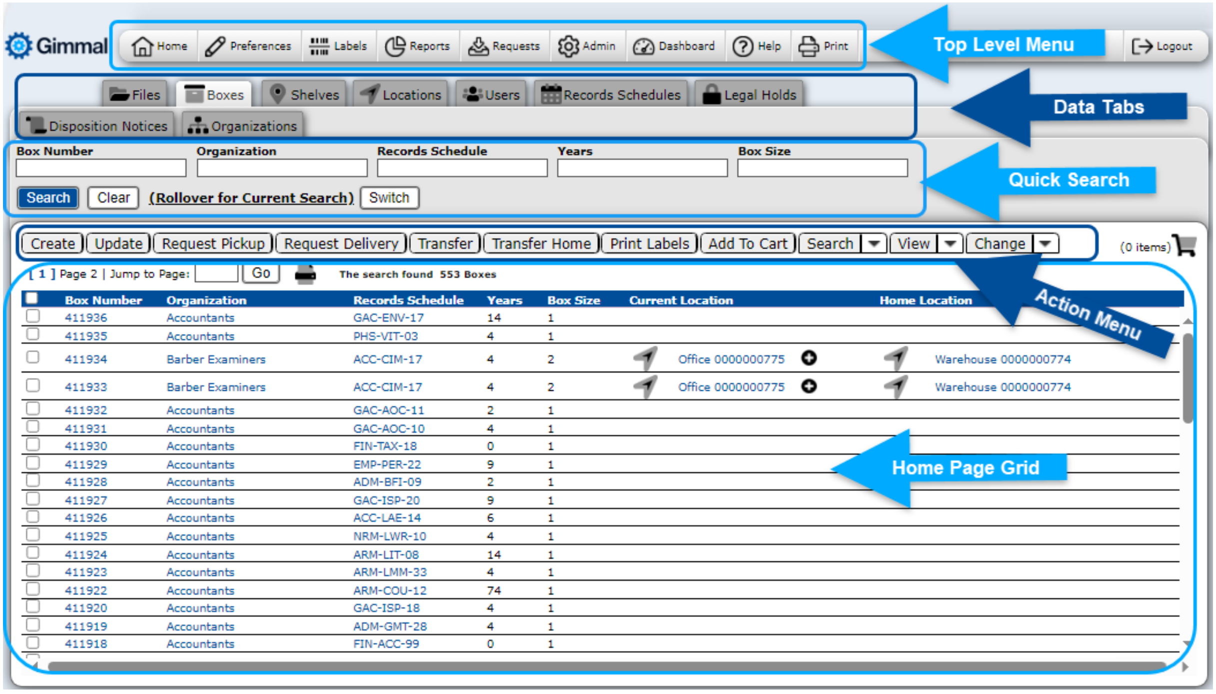
These guides are designed to walk you through the functionality of Gimmal Physical.

Please note: These guides reflect the most current version of the product. Please refer to the legacy section or contact support[84]for relevant documentation for older versions of the application.

Please use the tree view on the left or the links below to find the appropriate article of interest.

84. mailto:support@gimmal.com

4.6.1.1 Home Page Overview



1. **Top Level Menu** – provides access to the various indicated functions. Also referred to as the Navigation Menu or Ribbon.
2. **Data Tabs** – used to list and manage the various items being tracked, both logical and physical
3. **Quick Search** – used to query records within the selected tab
4. **Action Menu** – buttons and drop down lists, which provide access to listed actions for selected items. Also referred to as the Action Toolbar.
5. **Home Page Grid** – displays queried results and allows navigation and selection of items

4.6.1.2 (Legacy Help) Installation Guide

4.6.1.2.1 Introduction

This article outlines the process for configuring a new on-premises installation of Gimmal Physical Version 3.15.x

> Note: If you are already using an earlier version of Gimmal Physical, please contact Gimmal support for assistance with the upgrade process.

4.6.1.2.2 Prerequisites

The following prerequisites are required for the installation of Gimmal Physical

- Database Server

    - Minimum SQL Server compatibility level 120 (SQL Server 2014)
    - Full-Text and Semantic Extractions for Search feature installed
    - The account used during the installation process must have the following roles in SQL Server:
        - dbcreator
        - securityadmin
          Note: If you are restoring or otherwise replacing an ***existing*** database, the account used during installation must be granted **dbreader, dbwriter,** and **dbowner** rights on that database.
- Visual C++ Redistributable. Links to these files can be found in the installer wizard:
    - Microsoft Visual C++ 2010 Redistributable (x86)
    - Microsoft Visual C++ 2010 Redistributable (x64)
- App Server(s)
    - .Net v4.8
- Required Server Roles (via Server Manager)
    - IIS Web Server
        - Web Server
            - Common HTTP Features
                - Default Document
                - Directory Browsing
                - HTTP Errors
                - HTTP Redirection
                - Static Content
            - Health and Diagnostics
                - HTTP Logging
            - Performance
                - Static Content Compression
            - Security
                - Request Filtering
                - Basic Authentication
                - Windows Authentication
            - Application Development
                - .NET Extensibility 4.8
                - ISAPI Extensions
                - ISAPI Filters
                - ASP.NET 4.8
        - Management Tools
            - IIS Management Console
                - IIS 6 Management Compatibility

        - IIS 6 Metabase Compatibility
        - IIS 6 WMI Compatibility
        - IIS 6 Scripting Tools
- Required Server Features (Via Server Manager)
    - .NET Framework 3.5 Features
        - .NET Framework 3.5 (includes .NET 2.0 and 3.0)
    - .NET Framework 4.8 Features
        - ASP .NET 4.8
        - WCF Services
            - HTTP Activation
    - Windows Process Activation Service
        - Process Model
        - Configuration APIs

Please Note:

- If installing Gimmal Physical using HTTPS/SSL mode, ensure that the SSL certificate is added to the Trusted Certificate Store before installing the application.
- The install will fail if passwords contain one or more equals signs (=) .

In some environments with elevated server hardening, the installer may fail to properly validate the provided Server and/or App Pool credentials. Where this occurs, please ensure that any Group Policy restrictions on Incoming and Outgoing NTLM traffic are disabled or set to 'Allow All' to ensure the validation of account credentials.
If you need further assistance, please contact Gimmal Support.

4.6.1.2.3 Installation

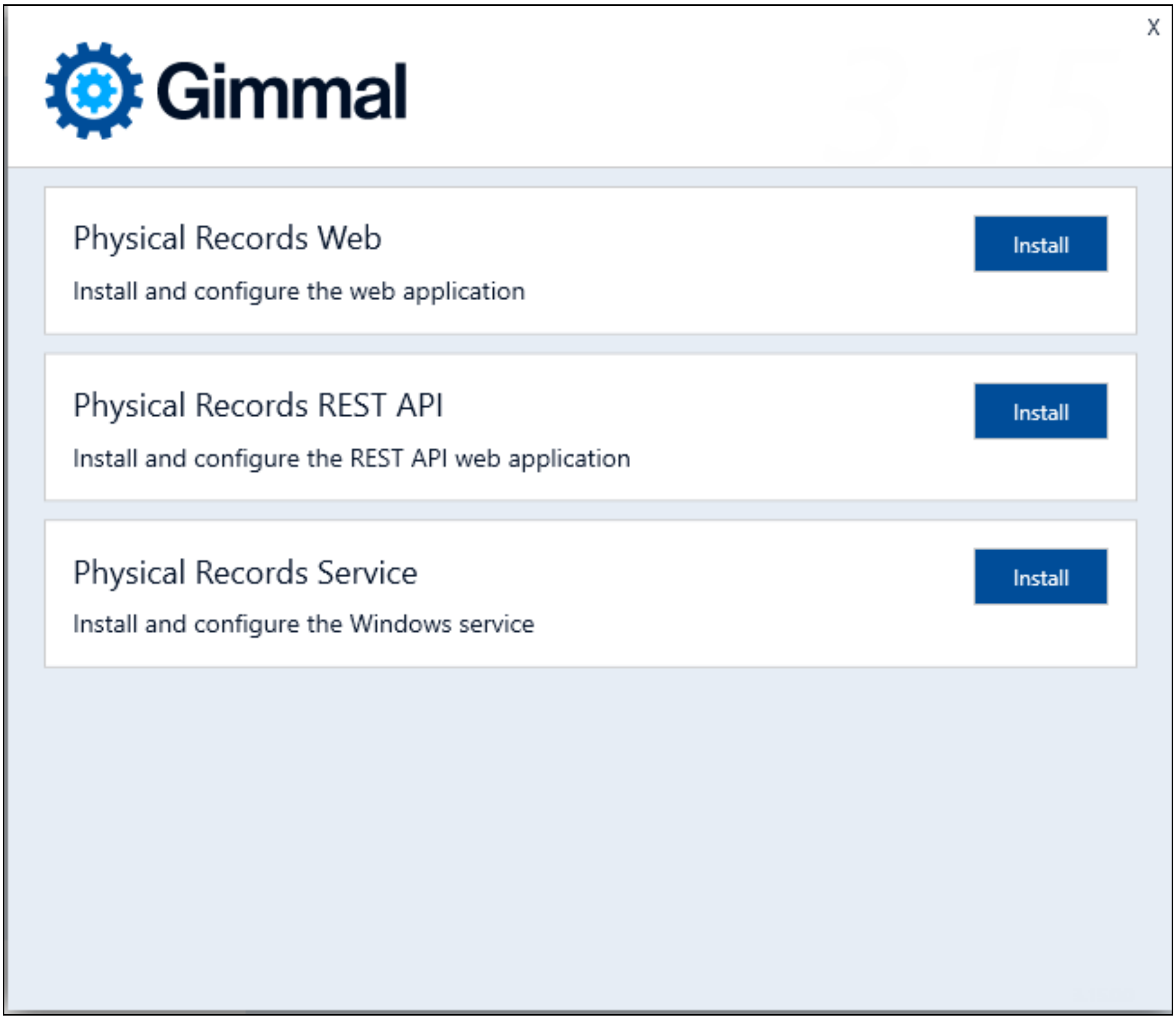
Gimmal Physical will provide an installation file (iso) for use in the installation process. This file includes the installer and many of the installation components.

To run the installer, please follow the steps below:

1. Mount and open the provided iso format installation package
2. Double-Click the *setup.hta* to run the installer.
3. The Installer home page opens with a number of choices.
    - Prepare - provides links to useful documentation
    - Prerequisites - provides links to the two Visual Studio C++ Redistributable prerequisite components that may need to be installed, if not present
    - Install - handles the installation of core components (see below)

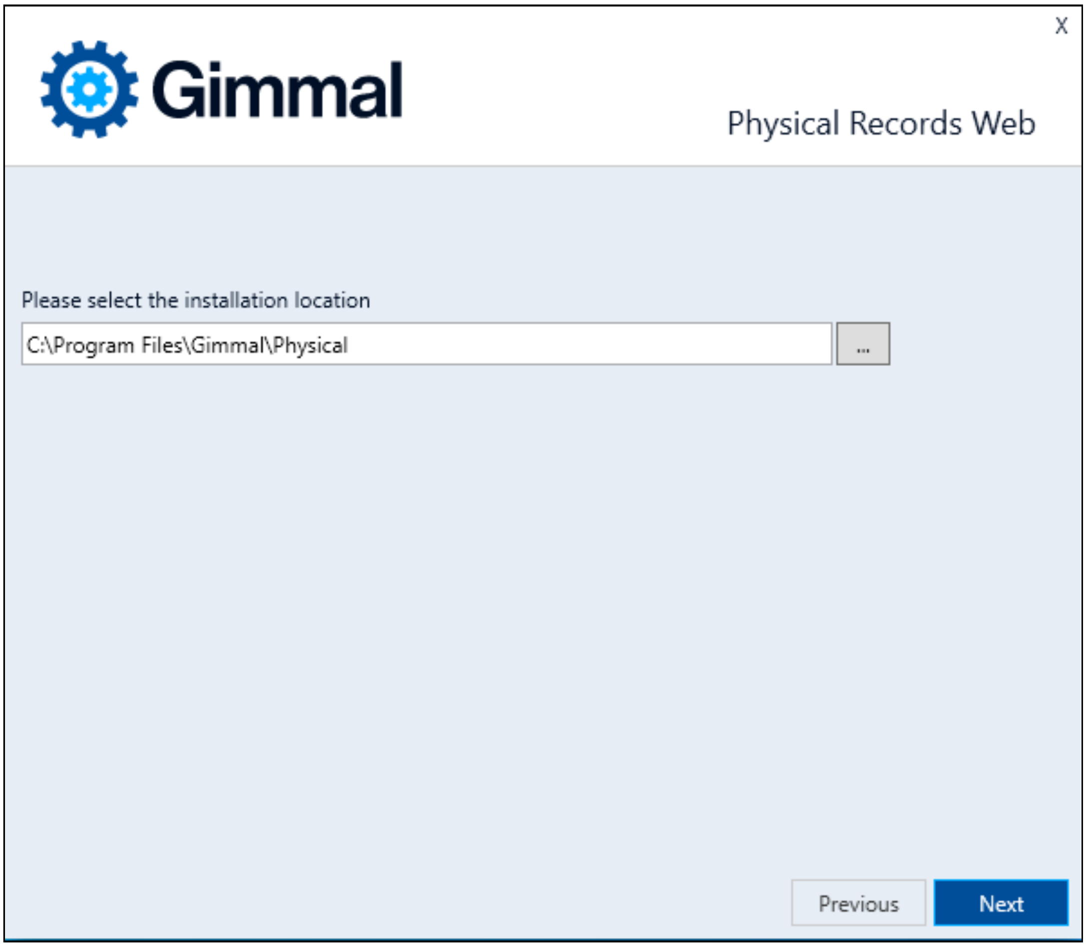
- Other Information - links to support and the Gimmal website

4. If necessary, click on each of the entries listed under Prerequisites to install them
5. To Install the required components to run the software, click *Core Components* under the Install option
6. Click 'Yes' on the UAC page to continue.
7. The main installation page will open, providing a choice of the components to install. For a complete program experience, all components need to be installed.
   Note: The installer will check for prerequisites as it continues

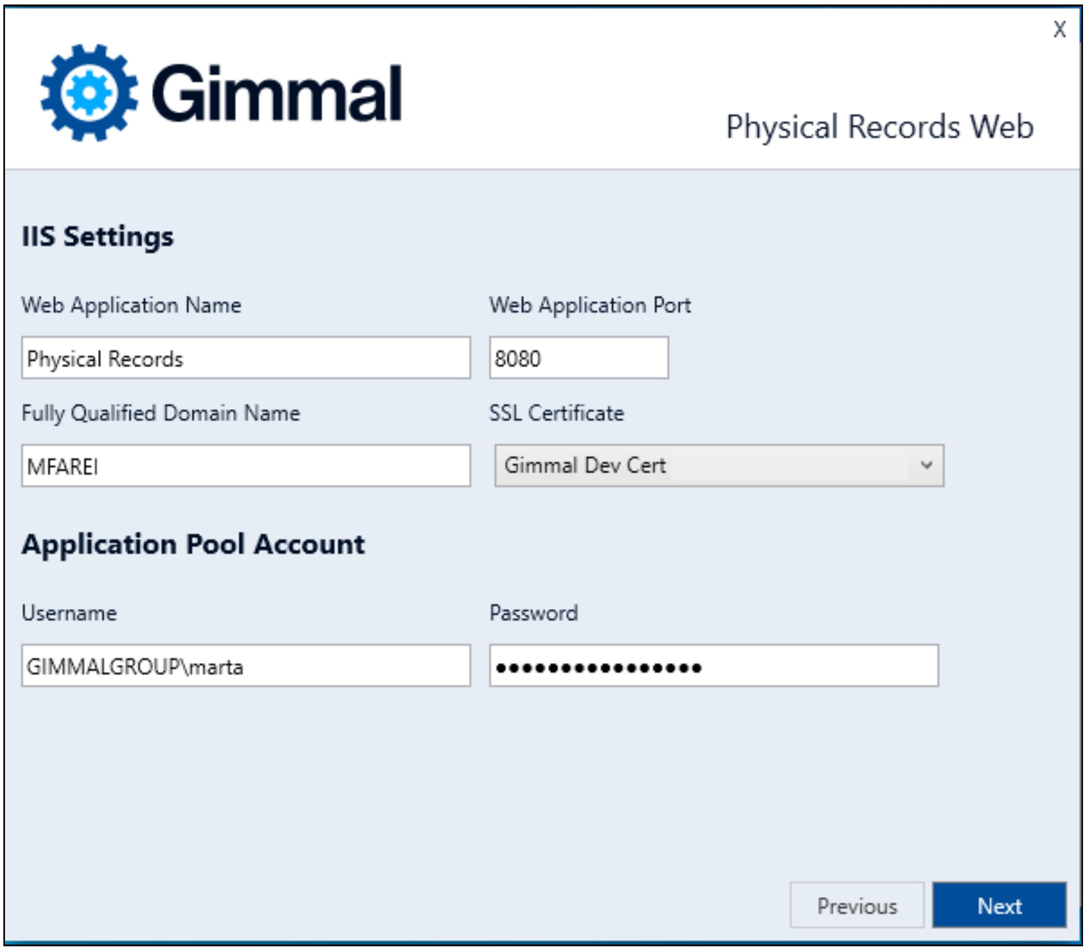


4.6.1.2.3.1 Physical Records Web

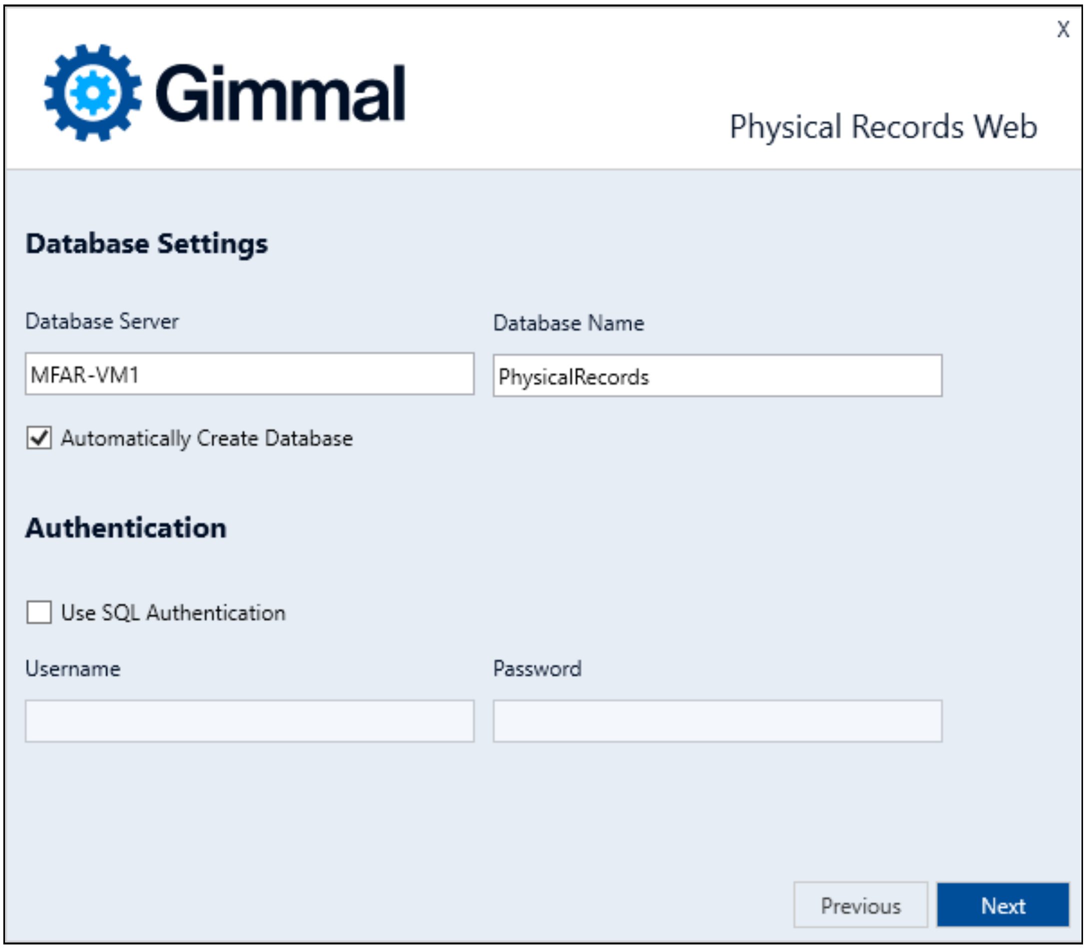
1. The Web Installer will first verify the Prerequisites. If they verify successfully, click 'Next'. If any anomalies are detected, resolve them, then restart the process.
    a. Choose the installation path and click 'Next'



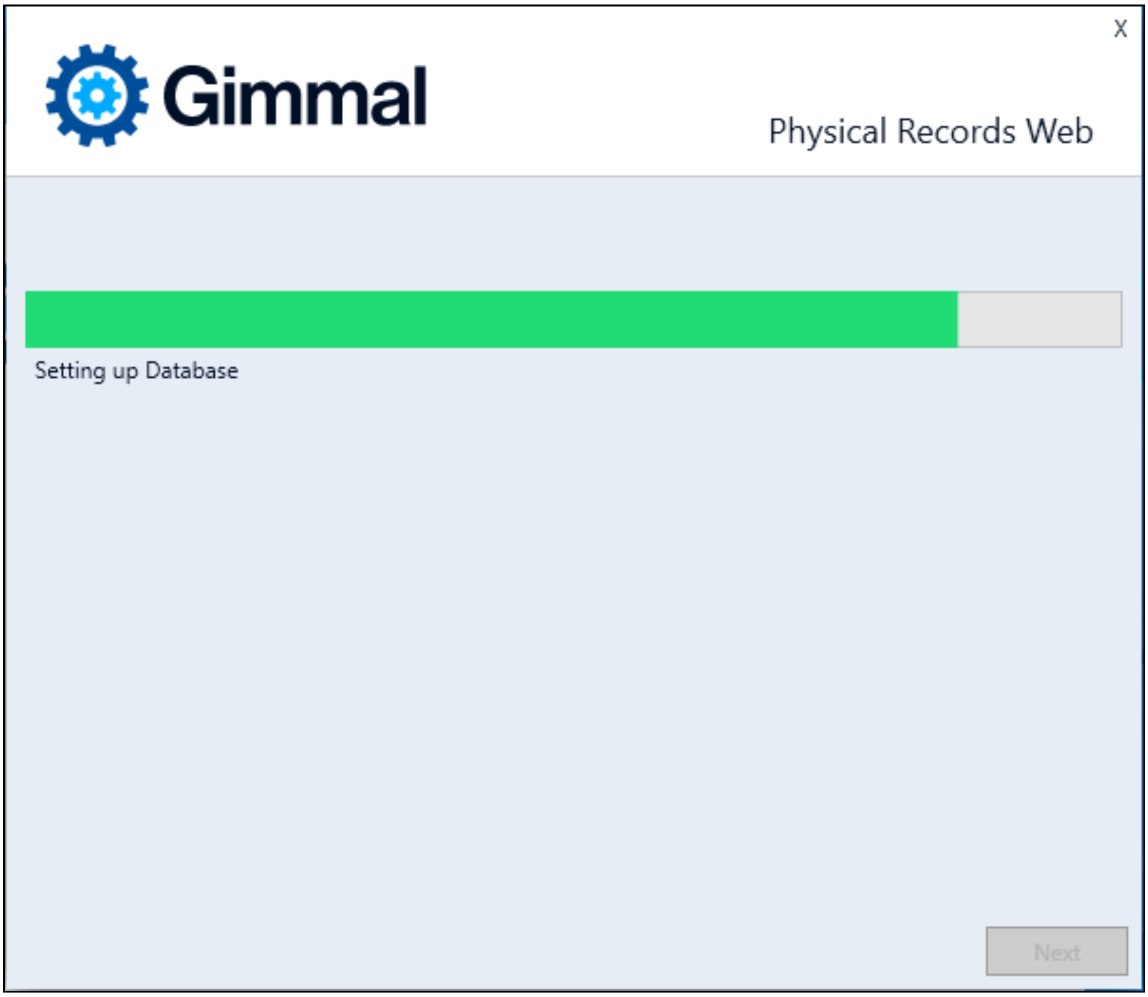
2. Configure *IIS Settings*
    a. Web Application Name: The default is PhysicalRecords
    b. Web Application Port: The default is 8080
    c. Fully Qualified Domain Name: Provide the FQDN for the current server host (or alternatively, the FQDN DNS name to be used)
    d. SSL Certificate Choose from the list of installed certificates
    Note:
        i. These settings can be configured manually after the installations, but it is more efficient to set them now.
        ii. To avoid issues the selected certificate *must* be in the Trusted Certificate Store.
3. Set *Application Pool Account*
    a. Username for a domain account. Note, use domain\username format
    b. Password for the domain account
    Note: The Application Pool account requires Full Control to the application directory.



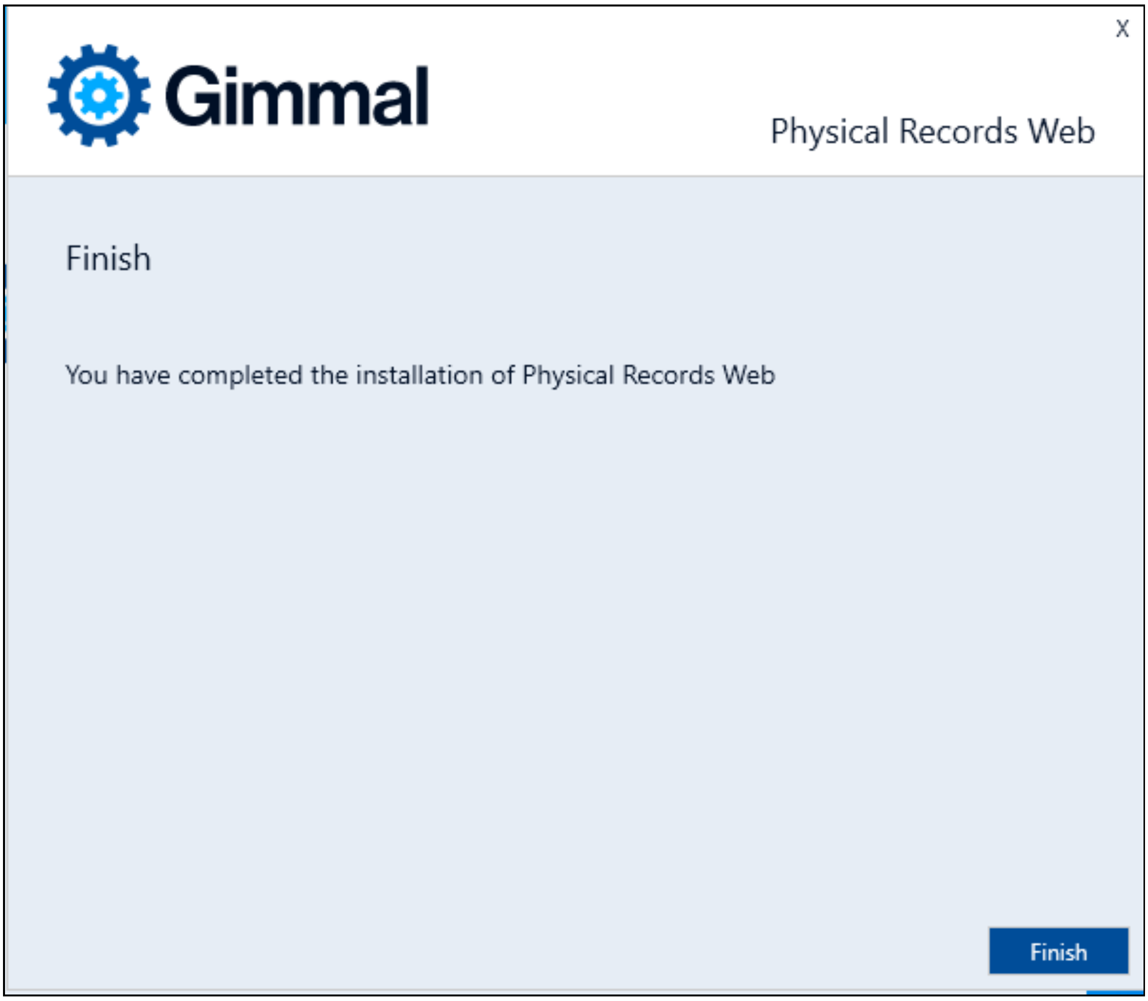
4. Click 'Next'
5. Configure Database Settings
    a. Database Server - The name of the database server which will host this database
    b. Database Name - the name of the database. The default name is *PhysicalRecords*
    c. Automatically Create Database - This option should be **unchecked** for on-premises installations. However, it is checked by default, this option will create a new baseline database on the database server listed above. This is not recommended for on-premises clients. In most cases, on-premises clients will receive a preconfigured database to import and they should uncheck this option.
    Note: If you are using non-standard regional settings and receive an error, please see note below.
6. Authentication (Database)
    Note: If these values are not set, then Windows Authentication will be used to connect to the database. In this case, the logged in user will have the appropriate permissions.
    a. Use SQL Authentication Check this option if you prefer to use SQL authentication with the credentials listed below



7. Click 'Next' to install the Physical Records Web and configure the database.



8. The installer will verify all components have installed correctly. Click ‘Next’.
9. Click ‘Finish’ to return to the main menu.



> In certain localized (on-prem) installations, when selecting the option to automatically create a database during installation, the installer may fail with an error similar to:
>
> **ExecuteNonQuery failed for Database 'DIS_DEV_Dummy'. ---> Microsoft.SqlServer.Management.Common.ExecutionFailureException: An exception occurred while executing a Transact-SQL statement or batch. --->**
>
> The result will be that the database is either not created or initialized incorrectly. However, the application binaries themselves are installed correctly. For additional assistance, please contact your Gimmal Team member after completing the installation.

4.6.1.2.3.2 Physical Records REST API

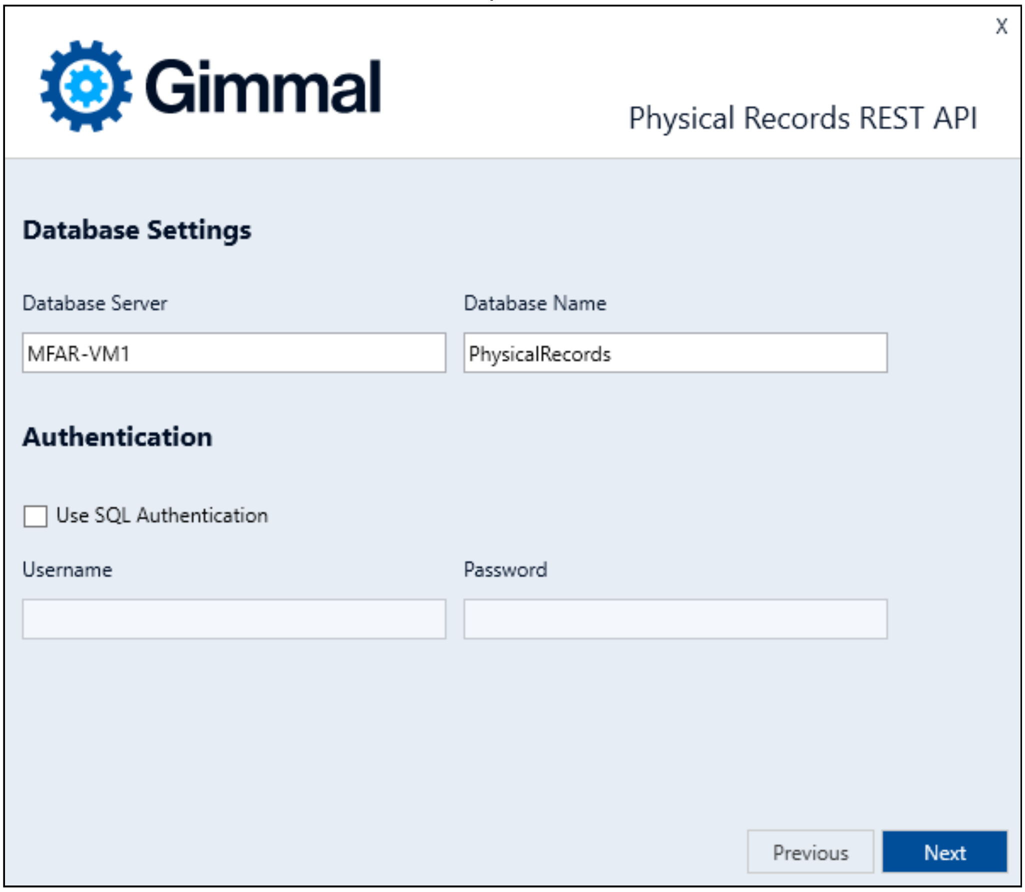
1. The Rest API Installer will first verify the Prerequisites. If they verify successfully, click ‘Next’. If any anomalies are detected, resolve them and then restart the process.
2. Choose the installation path and click ‘Next’
3. Configure IIS Settings
    a. Web Application Name the default is PhysicalRecords

b. Web Application Port the default is 8081
Note: Ensure this is a different port from that configured for the Physical Records Web in the steps above.
c. Fully Qualified Domain Name Provide the FQDN for the current (application) server host
d. SSL Certificate Choose from list of installed certificates (if available)
Note:
   i. These settings can be configured manually after the installations, but it is more efficient to set them now.
   ii. To avoid issues the selected certificate *must* be in the Trusted Certificate Store.

4. Set *Application Pool Account*
   a. Username for a domain account. Note: use domain\username format
   b. Password for domain account
   Note: The Application Pool account requires Full Control to the application directory.

5. Click 'Next'
6. Configure Database Settings
   a. Database Server - The name of the database server which will host this Gimmal Physical database
   b. Database Name - the name of the database. The default name is *PhysicalRecords*

c. Authentication (Database)
   Note: If these values are not set, then Windows Authentication will be used to connect to the database. In this case, the logged in user must have the appropriate permissions.
   i. Use SQL Authentication Check this option if you prefer to use SQL authentication. Enter the credentials listed below if this option is selected.



7. Click 'Next' to install the Physical Records Rest API.
8. The installer will verify all components have installed correctly. Click 'Next'
9. Click 'Finish' to return to the main menu.

4.6.1.2.3.3 Physical Records Service

This component is used to coordinate job services.

Note: For optimal performance, Gimmal recommends installing the Physical Records Service on a machine separate from your web server. This machine must have access to the database server.

1. The Rest API Installer will first verify the Prerequisites. If they verify successfully, click 'Next'. If any anomalies are detected, resolve them and then restart the process.
2. Choose the installation location and click 'Next'

3. Configure *Service Settings* by entering the Username and Password of a service account which will run the Physical Records Service. Click ‘Next’ when finished.

4. Configure Database Settings and Authentication to mimic those used in setting up the physical Records REST API
5. Click 'Next' to begin the setup and configuration of the Physical Records Service
6. Click 'Next' to install the Physical Records Service
7. The installer will verify all components have installed correctly. Click 'Next'
8. Click 'Finish' to return to the main menu.

Once all three components have been installed, the application is functional and should be tested by opening a browser and navigating to the site.

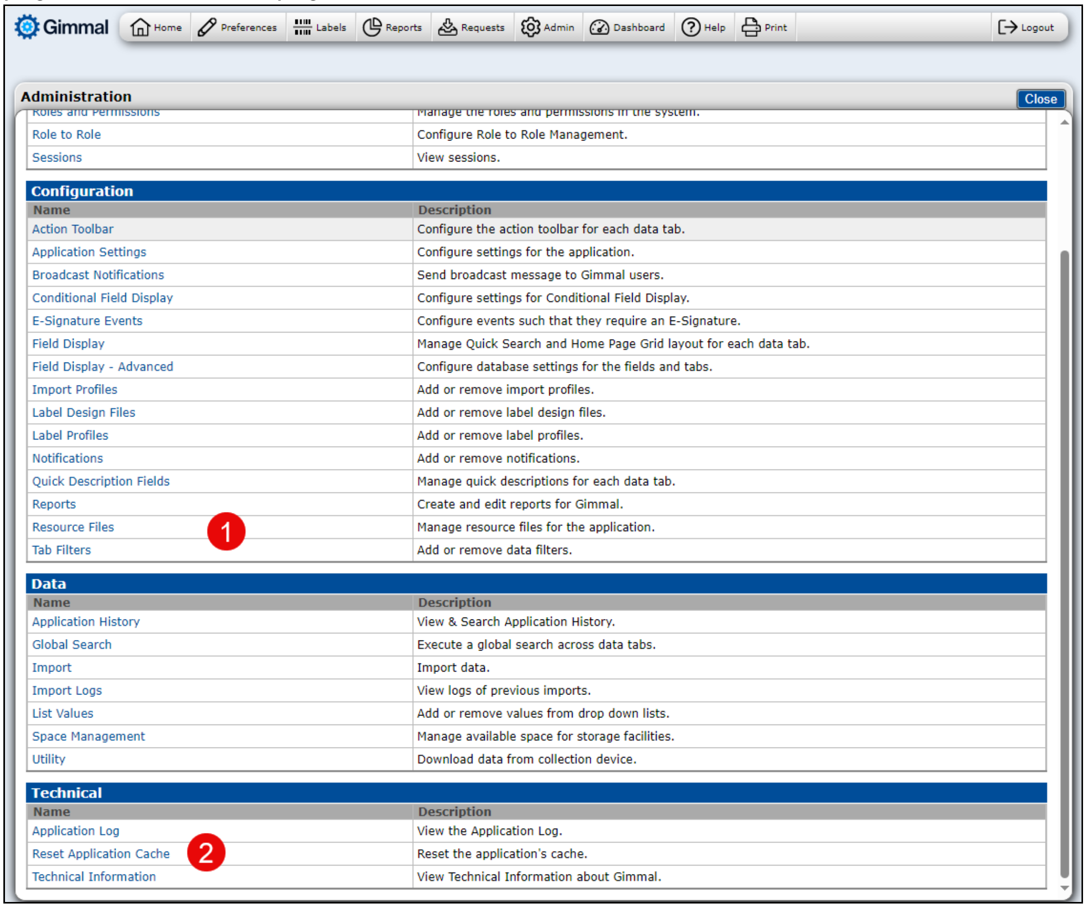
4.6.1.2.4 Upgrade

If you have an existing installation of Gimmal Physical that needs to be upgraded, please contact Gimmal Support for assistance.

4.6.1.2.5 Post-Installation

After installing or upgrading the Gimmal Physical Application, there are several optional, but recommended, steps that reset cache and configuration so the recent updates will be shown correctly. These are performed inside the application.

1. Reset Application Cache -
    a. Navigate to *Admin* on the Top Level Menu
    b. Choose *Reset Application Cache* from the Technical section close to the bottom (2).
    c. Click 'OK' at the popup box to verify the reset.
2. Recreate Resource Files -
    a. Navigate to *Admin* on the Top Level Menu
    b. Choose *Resource Files* close to the bottom of the Configuration section (1).
    c. Click the *Create Resource Files* link from the Manage Resource Files page
    d. Click the 'Recreate English' button from the top right of screen. This recreates the default pages for the resource pages.



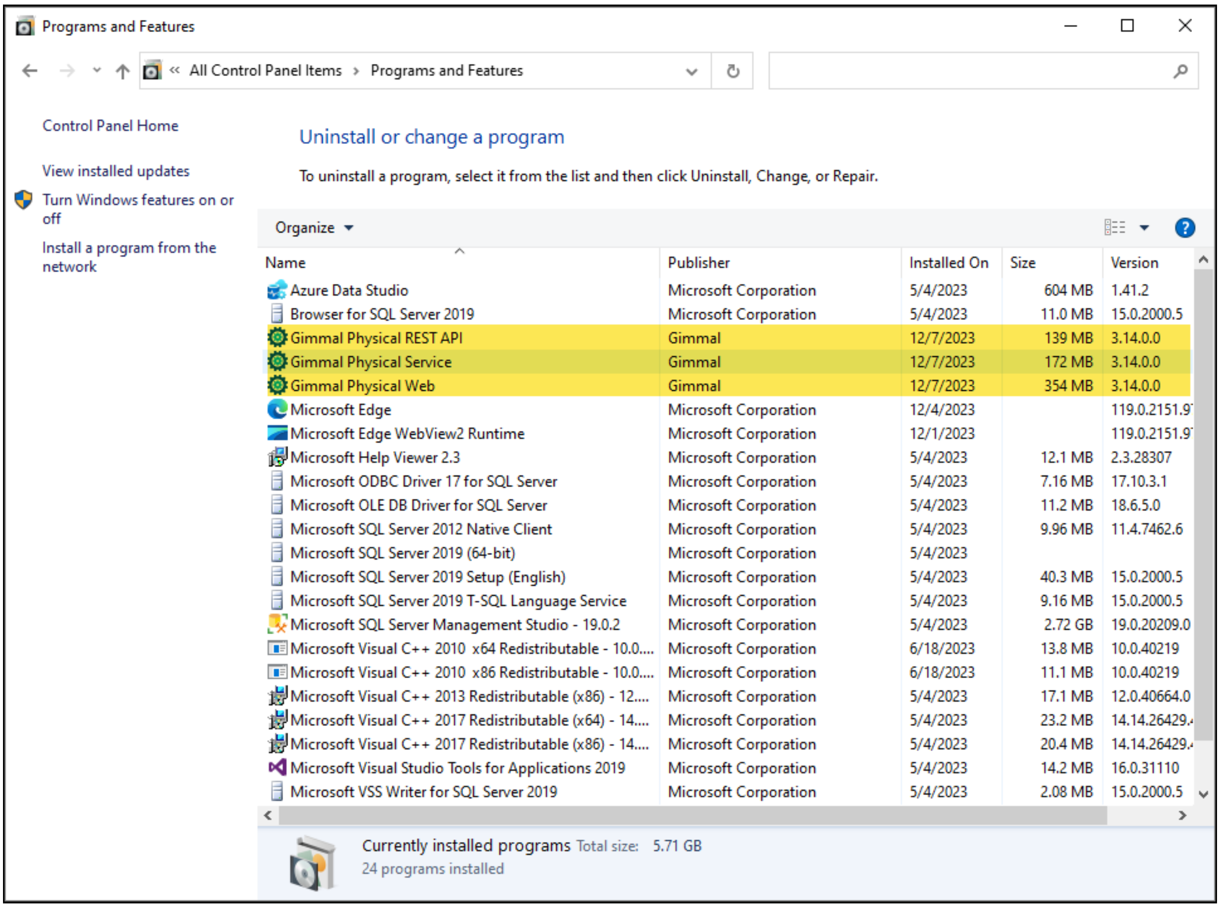
4.6.1.2.5.1 Troubleshooting

While the installer validates a number of prerequisites and required values, it is always possible for errors to occur. The installer will log any such errors in the Windows Event Viewer.

The Application Log found in *Admin | Application Settings* may also prove helpful.

4.6.1.2.6 Uninstalling

To Uninstall Gimmal Physical, please use the *Programs and Features* option in the Control Panel to uninstall each component. This will remove aspects of the application except the database.



Please contact Gimmal Support with any questions or concerns.

4.6.1.3 (Legacy Help) Quick Start Guides

Please use the tree view on the left or links below choose the Quick Start Guide of interest.

Please note: These articles reflects the most current version of the product, 3.14 (see page 311).

- (Legacy Help) Quick Start Guide for Administrators (see page 346)
- (Legacy Help) Quick Start Guide for General Users (see page 348)

4.6.1.3.1 (Legacy Help) Quick Start Guide for Administrators

4.6.1.3.1.1 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 under ‘Security Access’.
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 under ‘Security Access’.
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 under 'Security Access'.
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 under 'Security Access'.
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 under 'Security Access'.
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.

4.6.1.3.1.2 Documentation Options

By default, the *Help* button found in the Navigation Ribbon will take users to the Gimmal Physical Documents Site[85].

> **Helpful Tip**
> If your organization has its own web-based documentation that you would prefer to use, Gimmal Physical will support linking your documentation to the default Help button. Do do so, copy the URL of your documentation into the the 'Gimmal Online Help URL' option found in Admin | Application Settings. Click 'Save' to update the Settings.

85. https://docs.gimmal.com/gp/

4.6.1.3.2 (Legacy Help) Quick Start Guide for General Users

4.6.1.3.2.1 General User Tasks

Finding Items

1. Click on the desired Tab.
2. To use the quick search, enter a value for the field you would like to search by in the Quick Search and press the Enter key or click the Search button.
3. Desired results will be returned in the grid format.

Requesting Items

1. Find the desired records as described above in Finding Items.
2. Click on the check box next to the desired item(s).
3. Click on the Request Delivery button in the Action Menu.
4. Click on the desired destination in the Recent Request Destinations grid or specify the desired destination on the resulting Request Items screen.
5. Click on the Request button on the Request page.
6. Click on the OK link in the resulting Request Results page.

4.6.1.4 (Legacy Help) User Guide

Please use the tree view on the left or links below choose the appropriate article of interest from the Gimmal Physical User Guide.

4.6.1.4.1 (Legacy Help) Basic Functionality

This section highlights the basic functionality of Gimmal Physical. Please click on the links to the left or the menu below for articles.

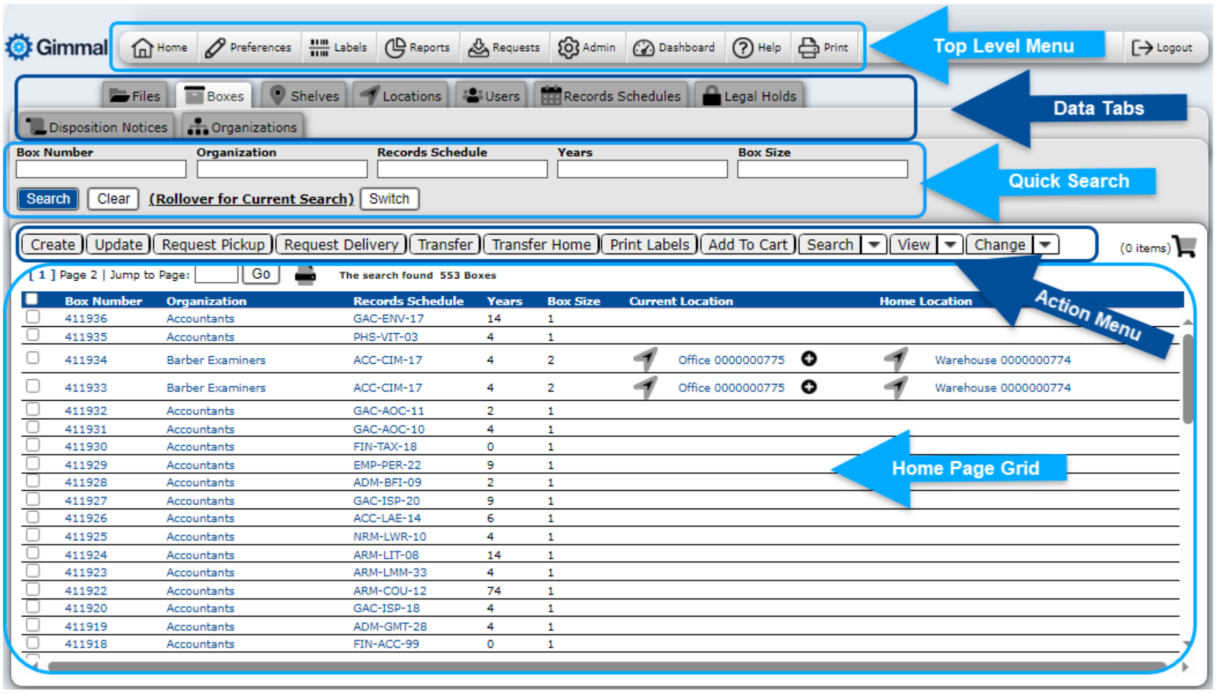
4.6.1.4.1.1 Related interactive tutorials

- Printing Labels[86]
- Reporting[87]
- Requesting[88]

4.6.1.4.1.2 (Legacy Help) User Interface Overview

This topic has an interactive tutorial. To view this tutorial, click here[89].

Gimmal Physical is a highly configurable application helping organizations of all sizes to manage physical records to their own specifications. Therefore, the screenshots and interface examples used throughout this guide may differ from the implementation used at your organization. However, the basic elements described below should be represented within your deployment.



86. https://gimmal.navattic.com/ql108di
87. https://gimmal.navattic.com/nu20au5
88. https://gimmal.navattic.com/gl10s6b
89. https://gimmal.navattic.com/cp106bd

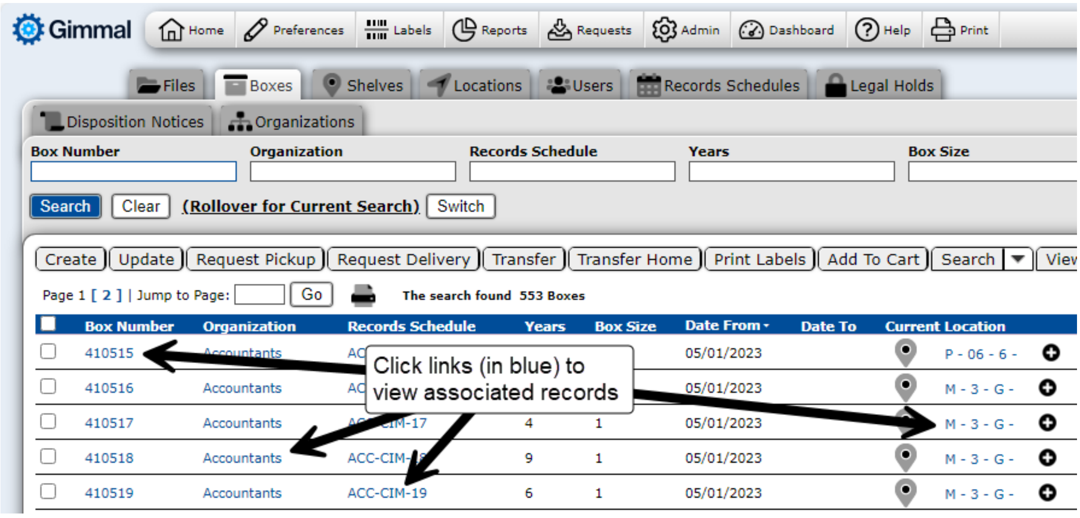
Home Page Overview

1. **Top Level Menu** – provides access to the various indicated functions. Also referred to as the Navigation Menu or Ribbon.
2. **Data Tabs** – used to list and manage the various items being tracked, both logical and physical
3. **Quick Search** – used to query records within the selected tab
4. **Action Menu** – buttons and drop down lists, which provide access to listed actions for selected items. Also referred to as the Action Toolbar.
5. **Home Page Grid** – displays queried results and allows navigation and selection of items

(Legacy Help) Viewing Records

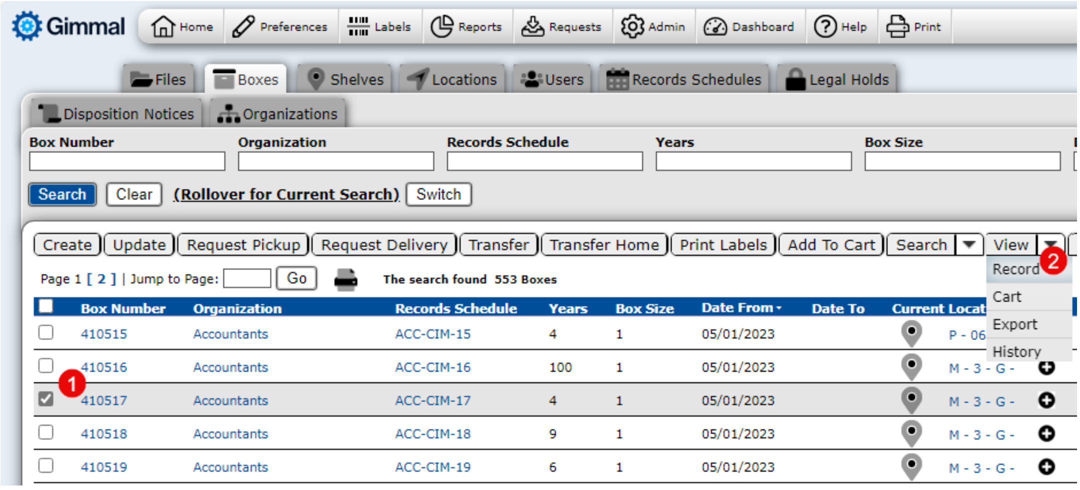
To view an item in Gimmal Physical

1. Click on the item type tab of the items you are interested in viewing. For example, if you want to view Boxes, click on the Boxes tab.
2. Search for specific items using any of the search options.
3. Select the item to be viewed by either:
   a. Clicking on the first column of desired item, displayed as a hyperlink. This will take you to the Item View page for the selected record.

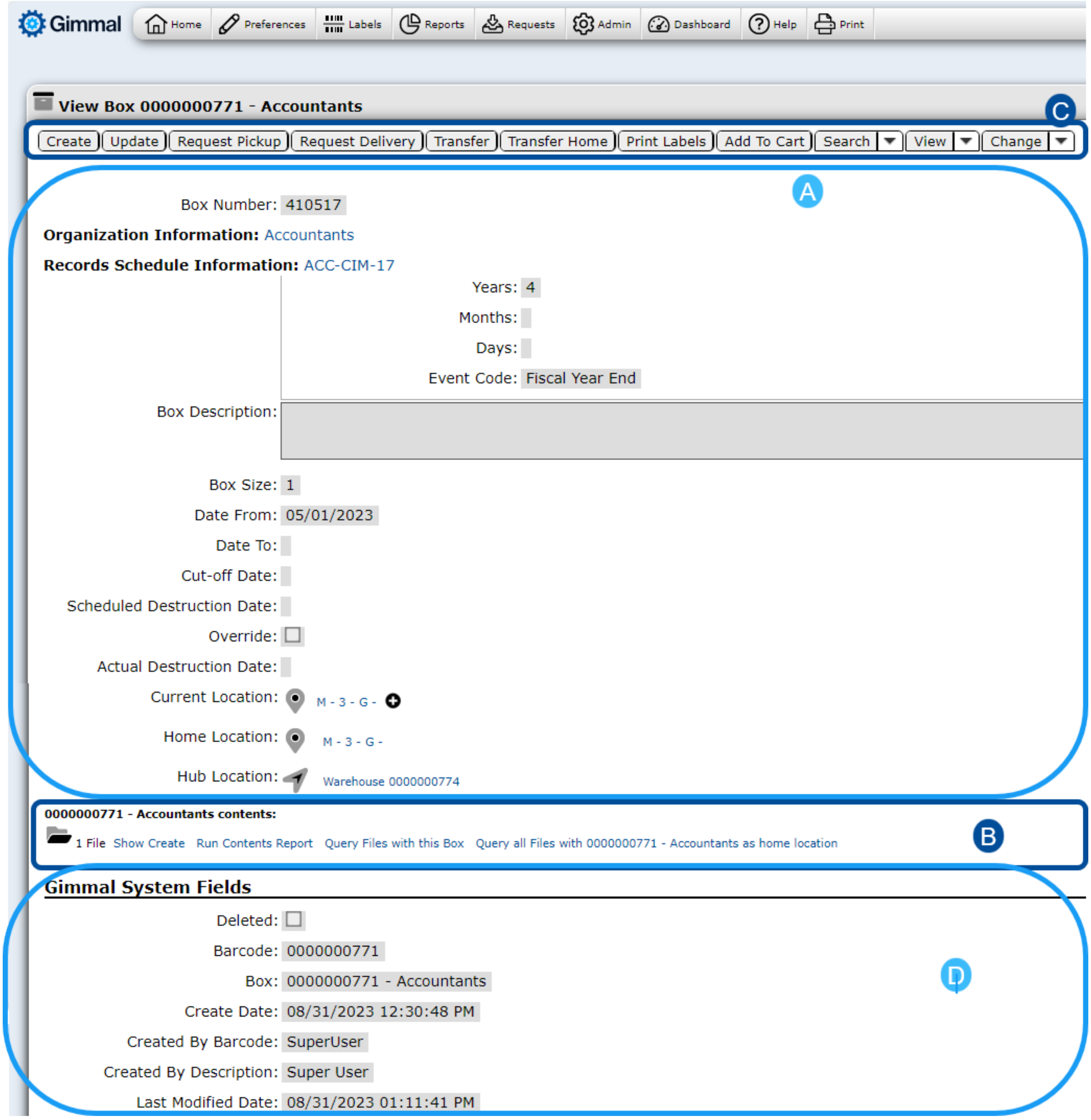


   Note: Clicking on any other link will take you to the associated record of the type listed in the referenced column. For example, clicking on a hyperlink in the Organization column will take you to the Organization record for the selected item - in this example 'Accountants'.

   b. Checking the box next to an item to select the record in the home page grid (1) and then clicking the View action button and selecting 'Record' from the drop down box (2).

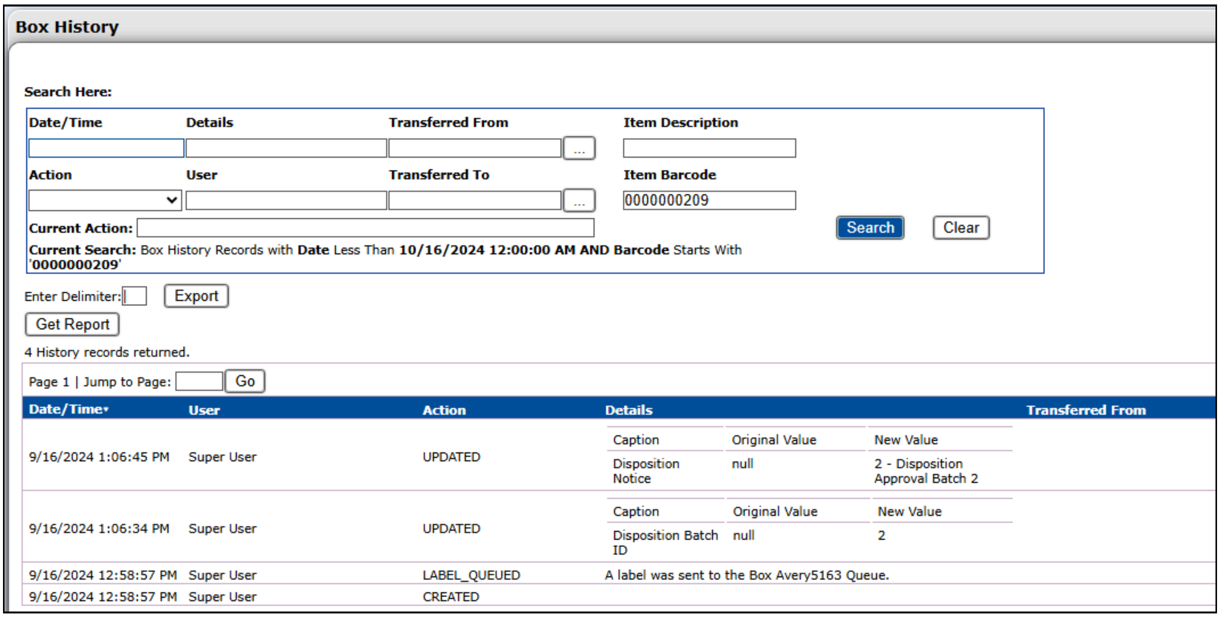


4. On the View page for the selected item, you can:
   a. View details relevant to this item type
   b. If applicable, see the contents of a container item and access actions that can be performed with those contents via links.
   c. Given the proper permissions, you can access various action buttons to work further with this item.
   d. View system generated information



(Legacy Help) Item History

Gimmal Physical keeps a complete history of actions performed on items managed in the application.



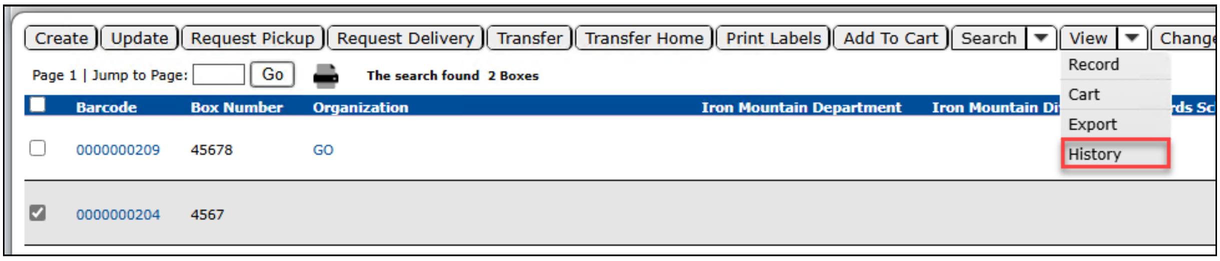
26 Box item history

With Gimmal Physical Item History you can see:

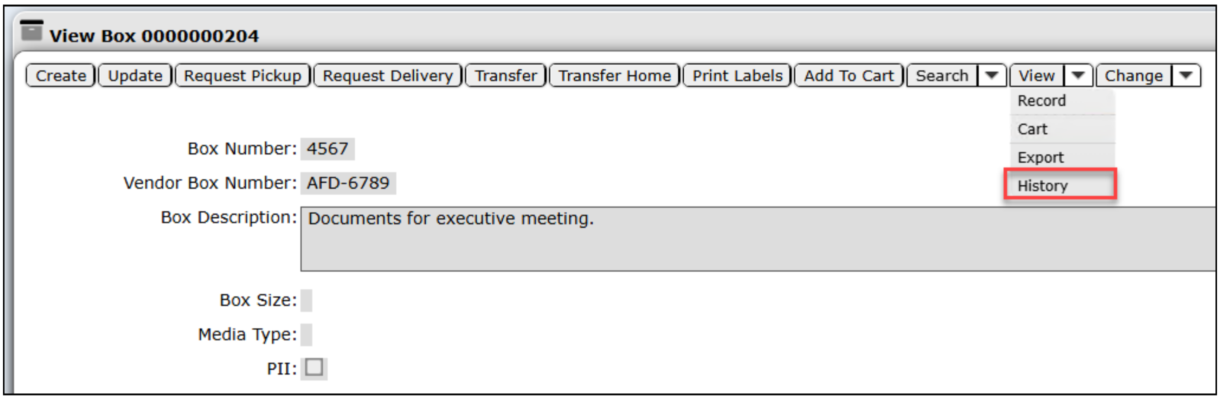
- The complete history of a record from creation to destruction.
- When a record was created and who created it.
- Who has viewed a particular record?
- When a record was requested and who requested it.
- When a record was transferred, who transferred it, and to whom it was transferred.
- Who has had a record in their possession and for how long.
- When a record was updated, who updated it, and the exact update(s) made.
- When the Home Location for a record was changed.
- When a record's label was added to, or removed from, the Labels queue.
- When a record was deleted.

To view the history of a record in Gimmal Physical

1. Locate the desired record in your Home Page Grid using the search options.
2. Click the checkbox next to the desired record, then select History from the View drop-down Action Button.
   Note: you can also view the properties of the Box, then click History from the View drop-down button.

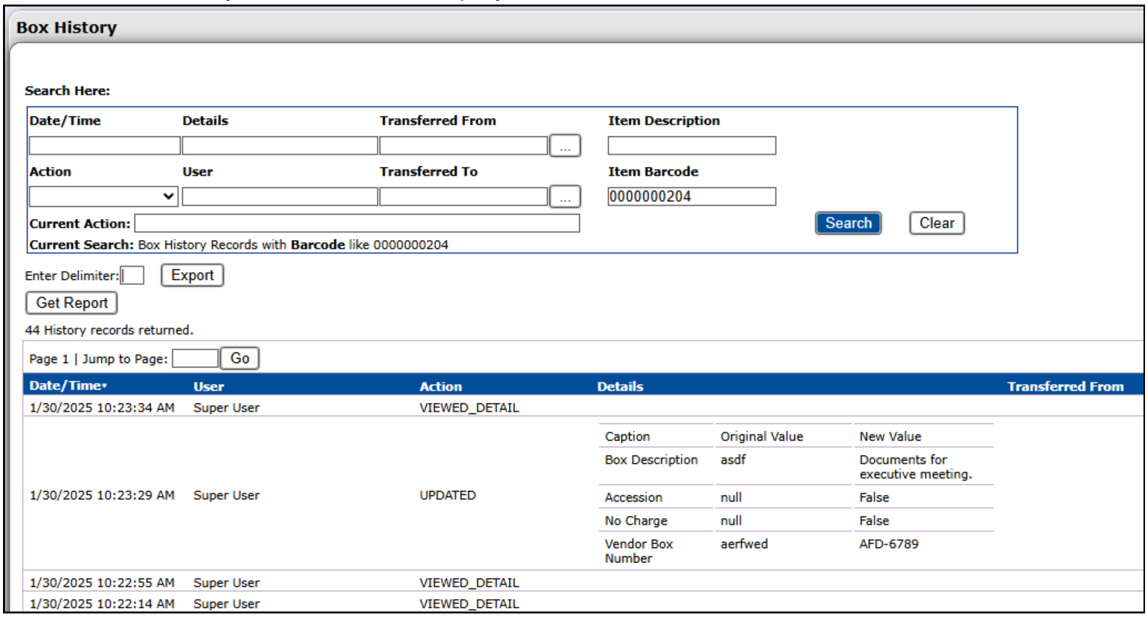


27 Access History from the Home Page Grid



28 Access History from the properties page

3. The Detailed history for that item is displayed.

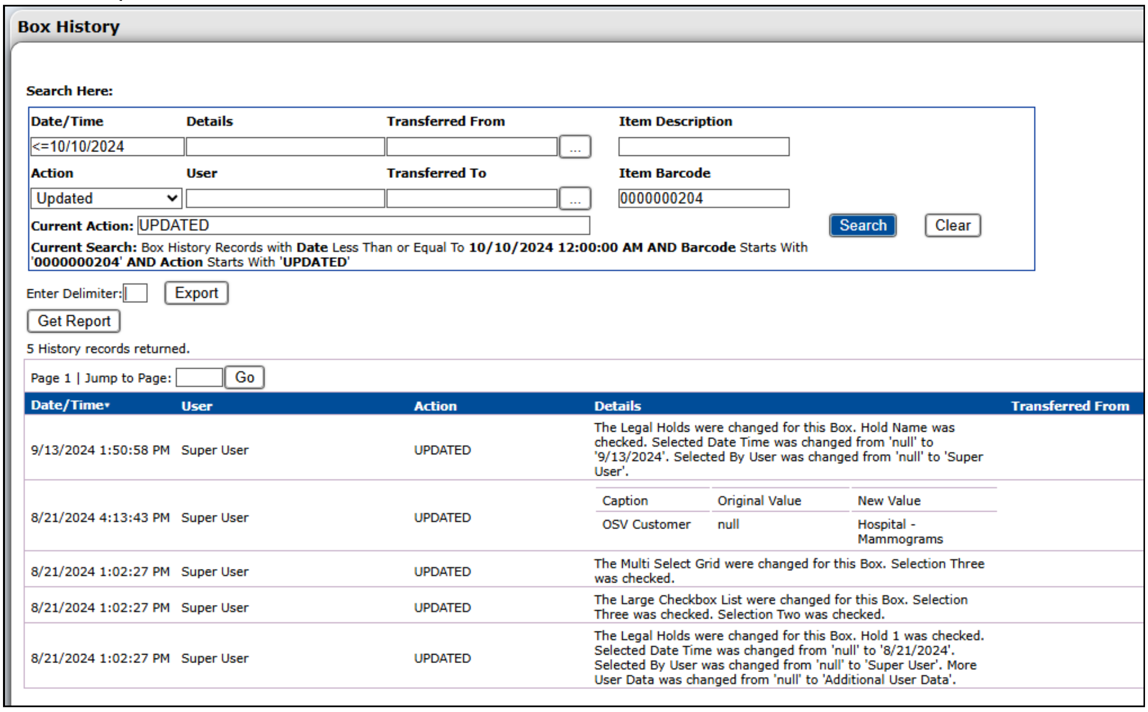


29 Detailed Box History

Search the Item History

The history of items in Gimmal Physical can be quite extensive. The application provides Search and Export functionality to help locate specific history entries.

- To execute a search, enter the value(s) for the field(s) you would like to find in the history, then click Search. You can use the same search operators you use when performing searches from the data tabs. A sample search to find updates to the box made on or before October 10, 2024, with an 'Updated' action, is shown below.

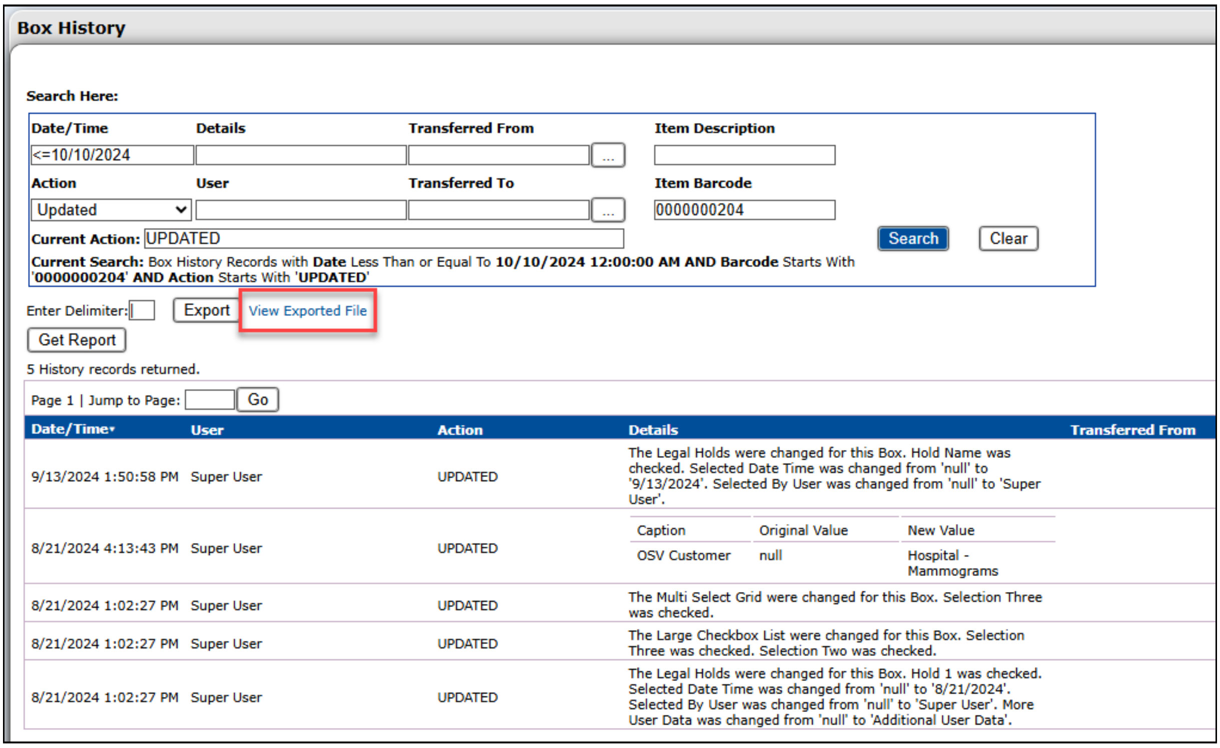


30 Sample box history search

Export History

You can export the entire item history or only the entries returned after executing a history search, as a CSV file. To export the history:

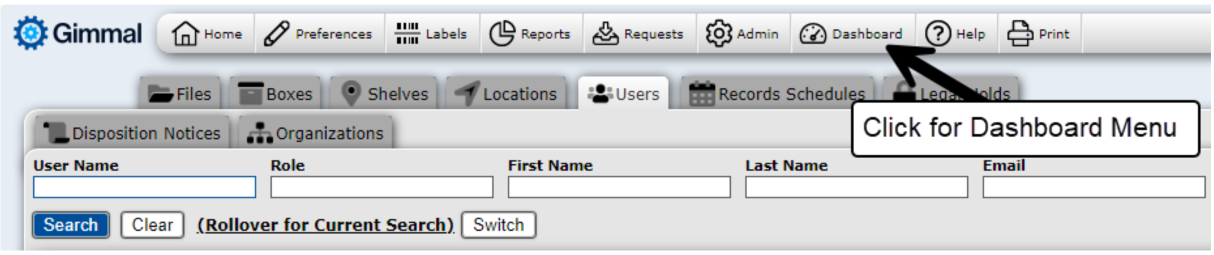
1. Select the appropriate field delimiter - it can be left as the default value or changed to another character.
2. Click the **Export** button.
3. The **View Exported File** link (see below) will be visible once the file is ready to export. Click the link to view and download the file.



(Legacy Help) Dashboard Navigation Window

The Gimmal Physical Dashboard is a view that centralizes a variety of data points and options of interest specific to the logged in user.

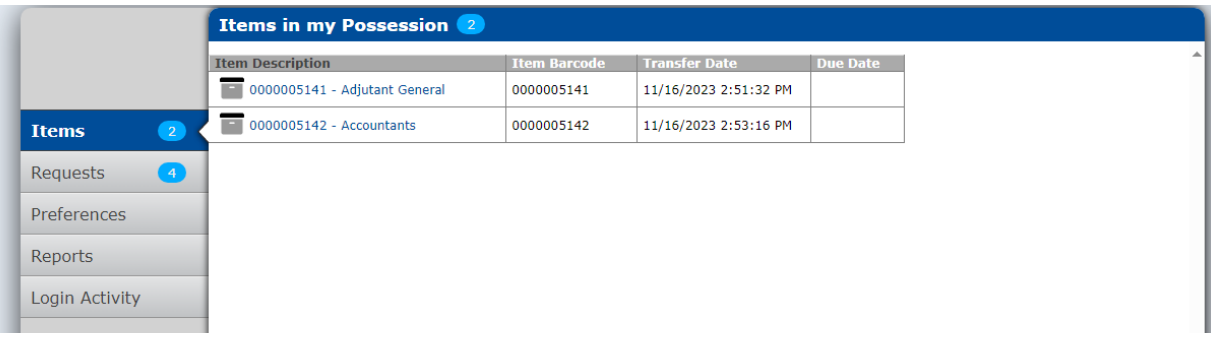
The Dashboard link is found on the Navigation Ribbon. Clicking on this link displays the 'Gimmal Physical Dashboard' screen in a separate browser window.



The Gimmal Physical Dashboard screen shows options available to the logged in user only. It contains five panels chosen by nodes on the left of the screen. They are detailed below:

Items

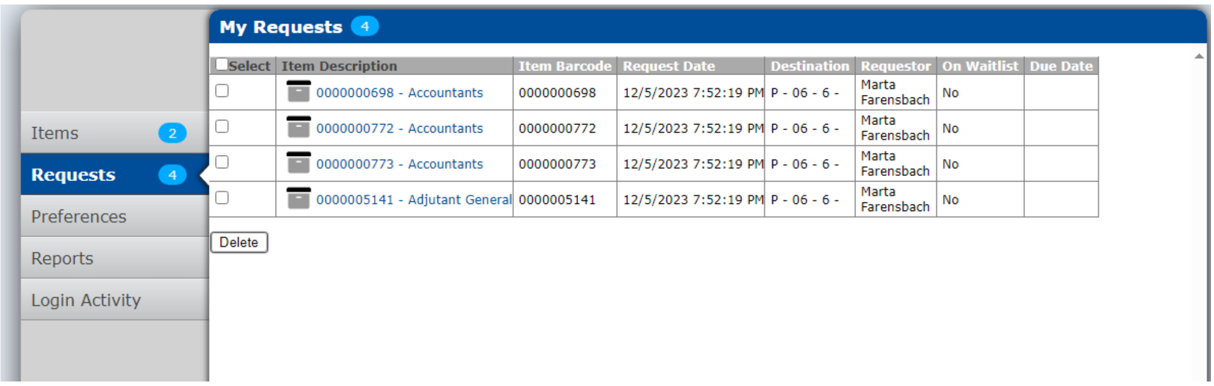
The Items panel is in focus when the Dashboard is first opened. It shows the Items that Gimmal Physical has listed as currently in possession of the logged in user.



Note: Clicking on the link in the Item Description column will open the selected item in 'View mode.

Requests

Selecting the Request panel will show all outstanding requests made by the logged in user. This list will include both available and waitlisted items.



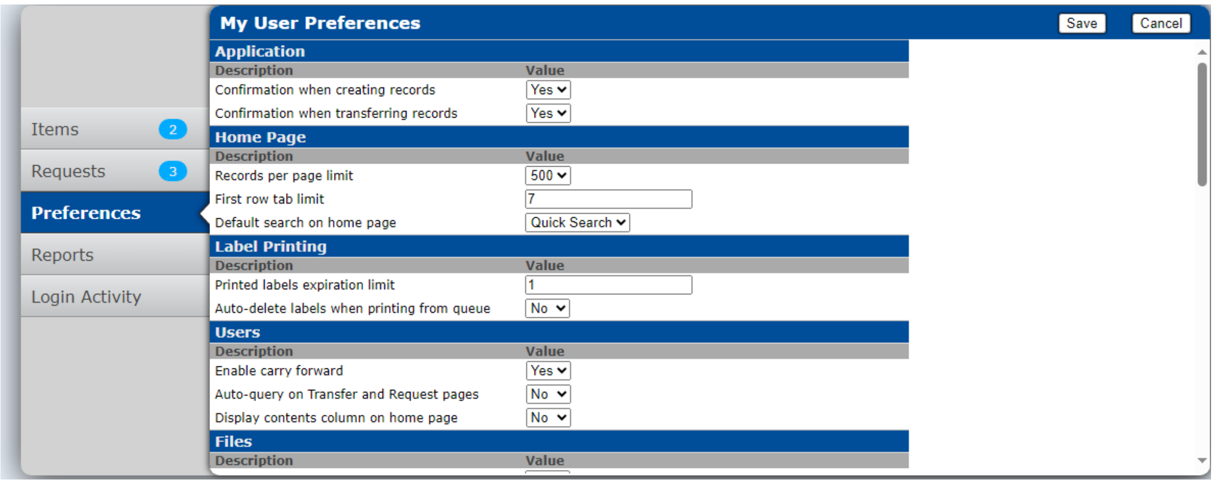
Note: Selecting one or more listed items and clicking the 'Delete' button will remove the selected request(s) from both the Dashboards and the Existing Requests queue.

Preferences

Clicking on the Preferences panel will show the preferences configurable by the logged in user. These preferences can be modified and saved on this screen.

Click the 'Save' button to store any changes to the values. Click 'Cancel' to restore the values before any changes were made.

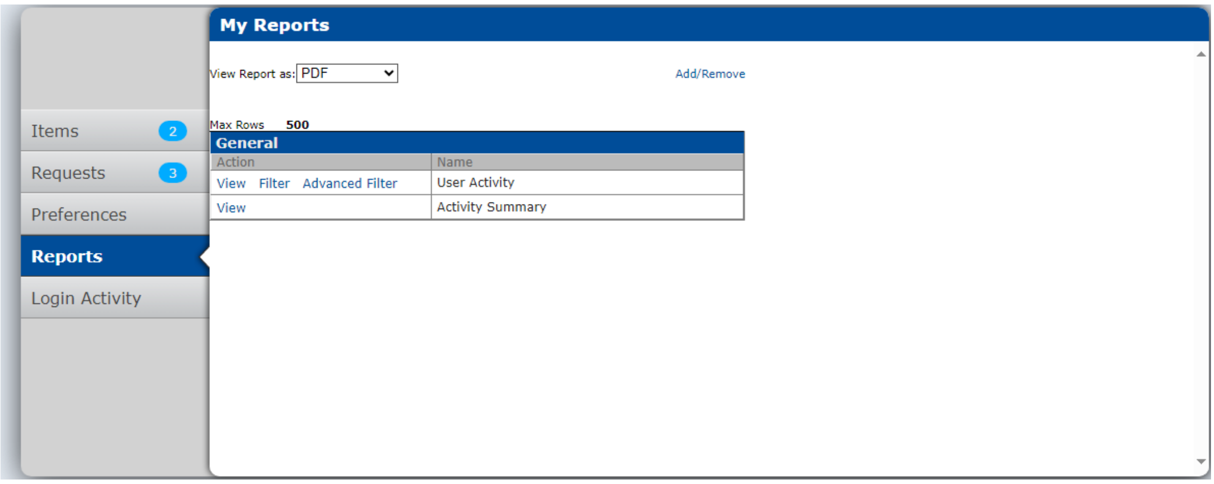
Note: All of these options are also found by clicking on the 'Preferences' section of the Navigation Ribbon and looking for preferences which have a 'Scope' of User.



Reports

Choosing the Reports panel will show all the reports that the logged in user has added to their personal Dashboard. These reports will be grouped in the same sections by type of report as seen on the main Reports page accessed via the Navigation Ribbon.

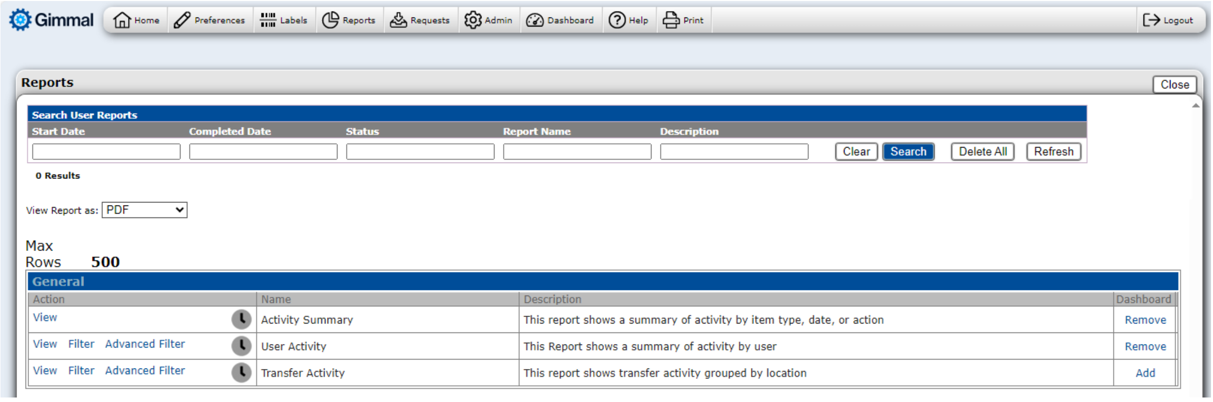
Note: Reports are added to this Reports panel via the Reports View accessed via the ‘Add/Remove’ link at the top of the page or via the Reports button on the Navigation Ribbon.



The Action column lists different actions that can be taken for the associated report. This list can change depending on the type of report. These options are mirrored on the Reports page.

- **View** initiates execution of the associated report. The report will then be accessible by clicking the ‘Add/Remove’ button from this screen, or the ‘Reports’ page (accessible from the Navigation Ribbon).
- **Filter** allows the user to enable a basic filter of the data for the associated report before it is executed.
- **Advanced Filter** directs the user to the advanced query page which allows more complex options for filtering data before the reports can be executed.

Clicking on the **‘Add/Remove’** link from the Reports panel will open the Reports view which features a listing of reports available to the logged in user.



- The ‘Dashboard’ column on the far right will show a link that changes depending on the status of the report:
  - An ‘Add’ link will be shown if the associated report is available to include in the list of reports on the Dashboard. Clicking the ‘Add’ link will copy a link to the associated report to the Dashboard Reports panel.
  - A ‘Remove’ link will be shown to remove the associated report from the list of reports in the Dashboard. Clicking the ‘Remove’ link will remove the associated report shortcut from the Dashboard Reports panel.

Note: Clicking the ‘Close’ button closes the Reports screen, and returns the user to the Home Page. Choose the ‘Dashboard’ link from the Navigation Menu to return to the Dashboard view.

Login Activity

The last node is governed by a separate security right ‘Enable Administrator Dashboard’. It shows the Login Activity for the application.

The ‘Result’ drop down box filters the chart accompanying table showing a paginated history of logins for the entire application. Select the option of choice, then click the ‘Search’ button. Click ‘Clear’ to return to the default view.

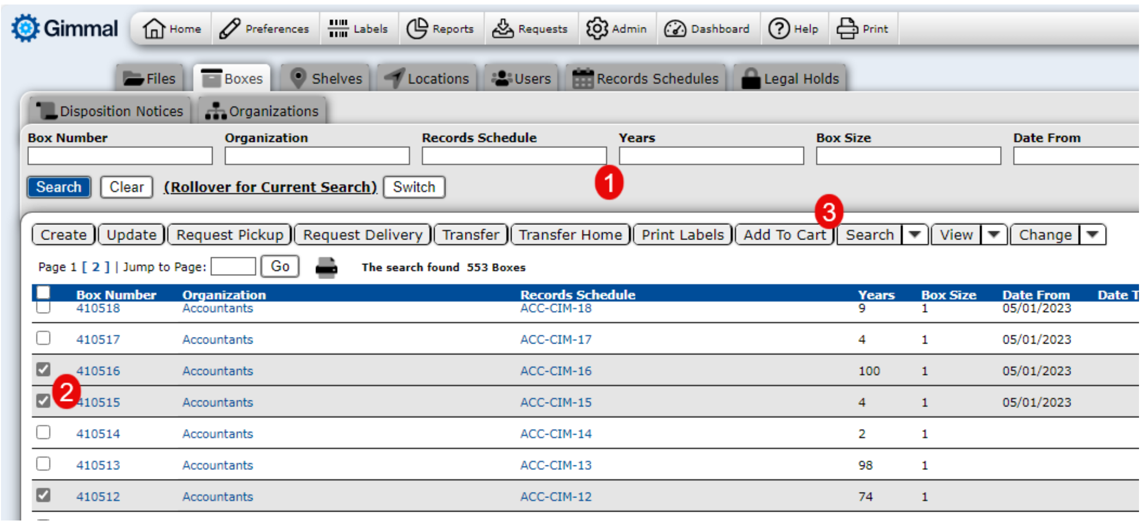
(Legacy Help) Cart Options

The Cart acts as a repository that allows users to perform common actions on items collected from multiple searches. This includes requests, transfers, and other actions.

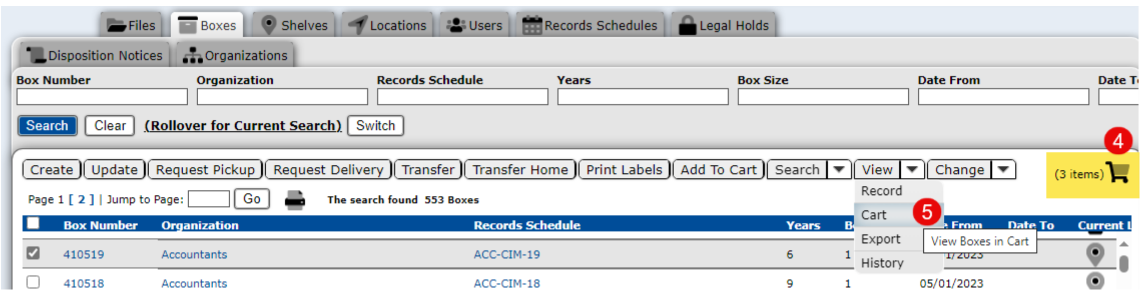
> ⚠ *Add All to Cart* options are not available in Gimmal Physical versions 3.14 and below.

To add items to the Cart:

1. Search for the desired items using the search options on the tab that contains the item type you wish to add to the Cart.
2. Choose the items to add to the Cart.
   a. To choose selected items: check the box in the first column for each desired item,
   b. To add everything from the query, do not make any selections. This will add as an 'Add all to Cart' option.
3. Click the 'Add to Cart' button. A verification message will appear with the total number of items to be added to the cart.

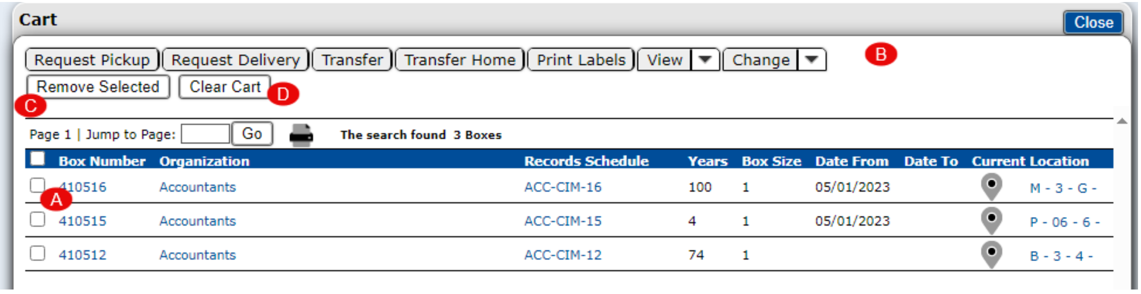


4. After items are added to the cart the cart quantity for this data tab is displayed to the right of the action bar.



5. To view the Cart, click on the View action button and select 'Cart' from the drop down menu.

6. To perform an action on the items in the cart, select the desired records (A) and then click on the appropriate Action Button (B).
7. After the action is performed, you can remove the selected items from the cart by clicking the Remove Selected button (C) or to remove all the items at once click the Clear Cart (D) button.



Helpful tips:

- Users can enable a confirmation when adding items to the cart. This is found by selecting Preferences from the Navigation Ribbon, choosing 'Application', and enabling 'Confirmation when adding to cart'.
- When adding selected items to the cart, the additions are processed immediately. However, when adding over 5,000 items to the cart, a background job will take over the process. This prevents interface timeouts but can take a significant amount of time before the cart can be updated.
- Carts are per user and cannot be shared.

4.6.1.4.1.3 (Legacy Help) Data Creation

This section outlines the methods of creating data in Gimmal Physical. Please click on the links to the left to view articles of interest or select from the links below

(Legacy Help) Creating & Updating Individual Records (see page 362)

(Legacy Help) Bulk Create (see page 366)

(Legacy Help) Import File Process Guide (see page 368)

(Legacy Help) Creating & Updating Individual Records

This topic has an interactive tutorial. To view this tutorial, click here[90].

There are many ways to create and update new records in Gimmal Physical. This article covers creating and updating individual records within the user interface. Before beginning, it may be helpful to review Preferences to help make data entry more efficient.

Please Note: If you do not see options to create or update data, please contact your administrator to ensure you have the correct permissions.

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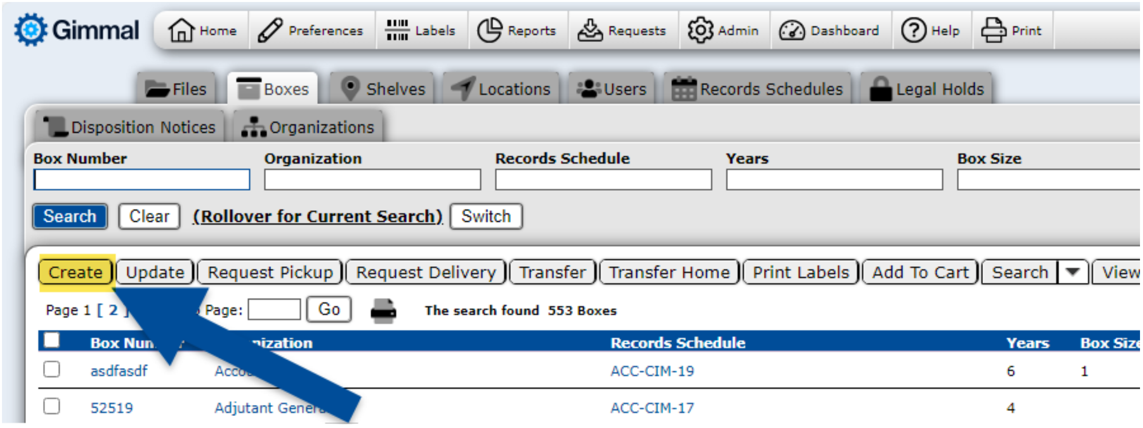
90. https://gimmal.navattic.com/iv10i5j

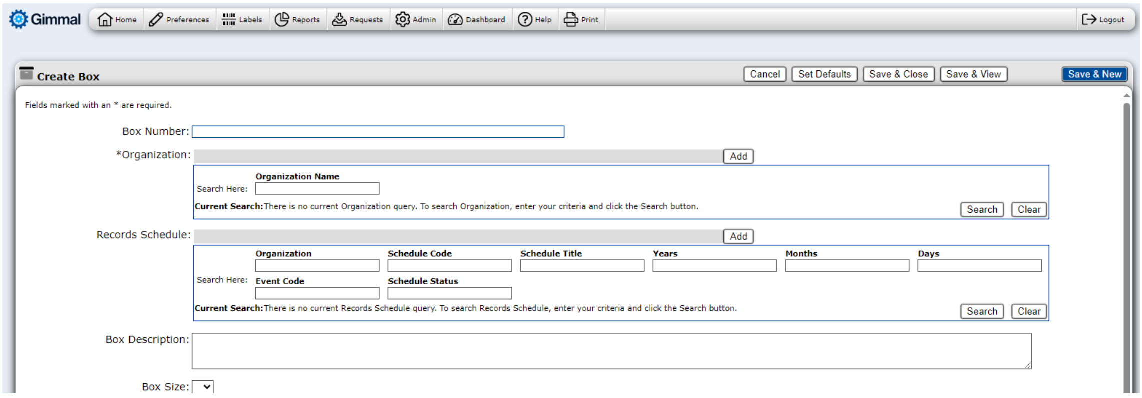
Creating New Records

Follow the steps below to create a new item in the Gimmal Physical User Interface:

1. Select the appropriate data tab from the Home Page. In our example, we will use Boxes.
2. Click the 'Create' button. This will open a 'Create Box' page.
   Note: Action button captions and locations may vary based on configuration.

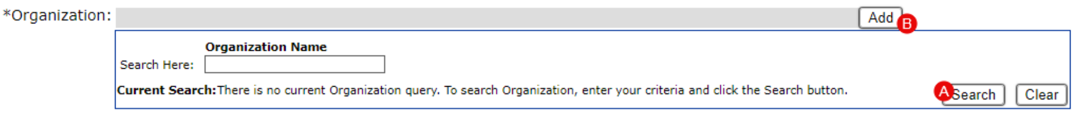


3. The Create Items page (in our example, 'Create Box') has several useful buttons at the top of the form:

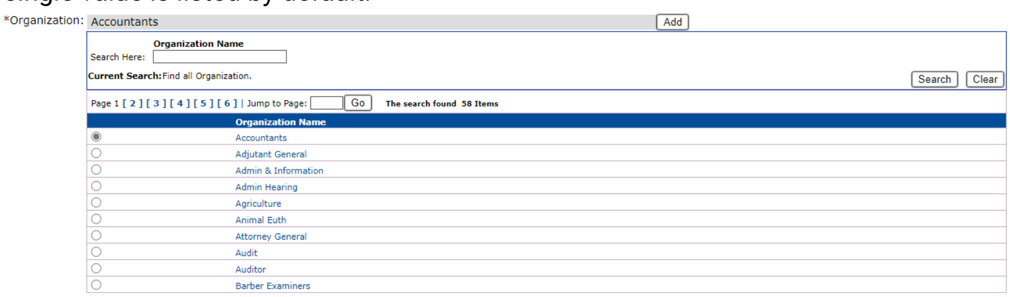


   a. **Cancel** closes the form without saving changes.
   b. **Set Defaults** saves the currently entered values as defaults for any new record of the same type.
   c. **Save & Close** will save all fields and close the form, returning to the home page.
   d. **Save & View** will save all fields and go to the View page for the item. This is useful if your next step is to take action on this item such as transferring it to another location or printing a label
   e. **Save & New** will save all fields for this item and remain on the page to create a new item. This option also allows for the use of use of Carry Forward (configurable by your system administrators).

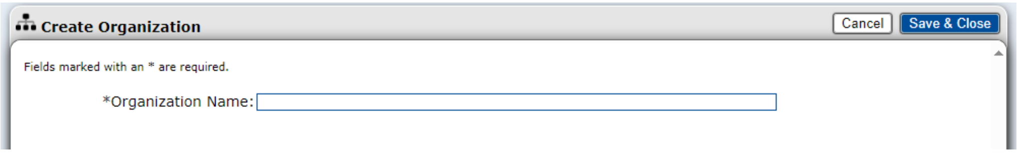
4. Fill in the necessary information by entering values on the Create Boxes page. There are several types of fields you may encounter on any creation screen:
    a. **Required fields** can be of any type, but are delineated by an asterisk, i.e. '*'. You will not be able to save the record without populating data into these fields
    b. **Text fields** like Box Description in our example take any text as an input. Some of these fields are restricted by size, others allow longer entries.
    c. **Numeric fields** like Box Number in our example accept only numeric input.
    d. **Date Fields** are restricted to date entries only.
    Note: The format of the date entered may be controlled in the settings of the application. Please check with your administrator for the correct format in use for your organization.
    e. **Range Fields** are fields that accept entries for a start and end value (e.g. '24-45' or 'Apple-Orange'). These fields must have a delimiter. The benefit of these fields is that that values between the ranges can be found in an appropriately configured search.
    f. **Check Box** fields allow users to click the field for a 'Yes' or otherwise positive value, or leave the value unchecked to indicate a 'No' or negative value for that field option.
    g. **Simple List** shows as drop downs that contain specific values so that a single value can be selected from the list. Fields like Status or Box Size tend to be simple list controls.
    h. **Large List Controls** have many entries from which a user can select one, or in some cases multiple options. These controls typically have a search function that allows users to filter the available values.



        i. By default*, no values are listed. Clicking the 'Search' button (A) will show the list of available values. Selecting a record will update the field value. This, in turn, may filter additional controls.
        *Note; Configured security may limit the available values to one item. In this case, the single value is listed by default.



        ii. If the option you are seeking is not in the list, and your security profile allows it, you may want to add a value to the list. The 'Add' button (B) allows you to do this by opening a creation screen for the data type shown in the field (in this example, Organization).



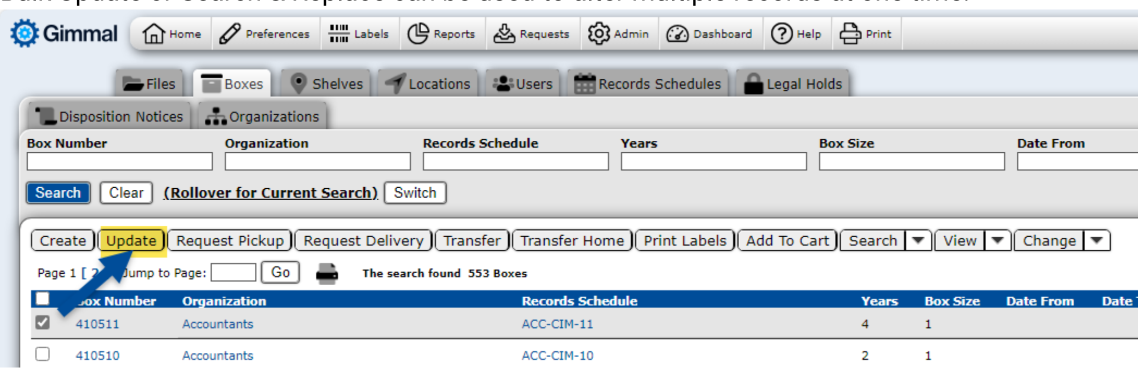
5. Click the appropriate button to save your changes.
    a. If any errors occur, a warning notification will be at the top of the screen.
    b. Errors may also be listed at the field level if the entered values fail to pass a configured validation test.

Helpful Tips:

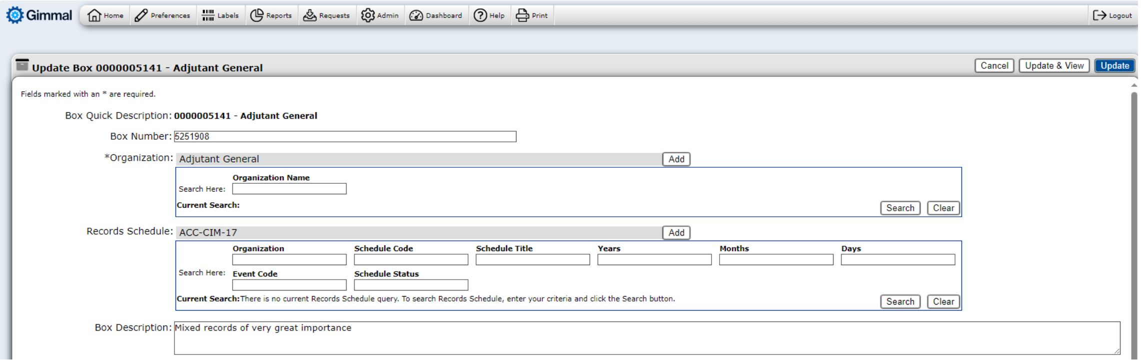
- Users can turn on the preference for ‘Confirmation when creating records’ under ‘Application’ Preferences. That will show an alert box of successful item creation after creating every item in Gimmal Physical.
- To quickly find the value in any drop down list, you can type some or all of the value.
- Other methods of record creation include:
    - Bulk Create (see page 366)
    - Imports (see page 368)
- Additional options can be configured by system administrators to make the process of creating data more efficient:
    - Carry Forward fields
    - Pattern sequencing (see page 416)

Updating Records

1. To update a record, you must first select the item you wish to update, then click the ‘Update’ button from the Action Menu.
   Note: You can use the various Search options to help you find the record you need to update. Bulk Update or Search & Replace can be used to alter multiple records at one time.



2. The ‘Update’ page will open. It will be titled with the description of the item you selected.



3. Change the fields that need to be updated.
   Note: The fields that are required for that item type will still be required on the update page. Required fields will be marked with an asterisk ‘*’. Your application may also be configured to require a reason for change. If this is the case, you must supply text for the ‘Reason for Change’ field.
4. Choose the button to manage your changes
   a. **Update & View** will save the changes and keep you in the view mode for the page. This is helpful if you need to perform an action (e.g. transfer) on the item after it has been updated.
   b. **Update** will save your changes and take you back to the home page.
   c. **Cancel** will return to the home page without saving your changes.

> Helpful Tip:
> To update multiple records at once, use the Bulk Update functionality.

(Legacy Help) Bulk Create

Gimmal Physical supports the creation of multiple records for users who need to add a number of similar items to the application efficiently. Rather than creating multiple individual records that have identical fields, Bulk Create saves time creating multiple items at once via the interface. These records will be identical in detail, except the individual item records will have different barcodes.

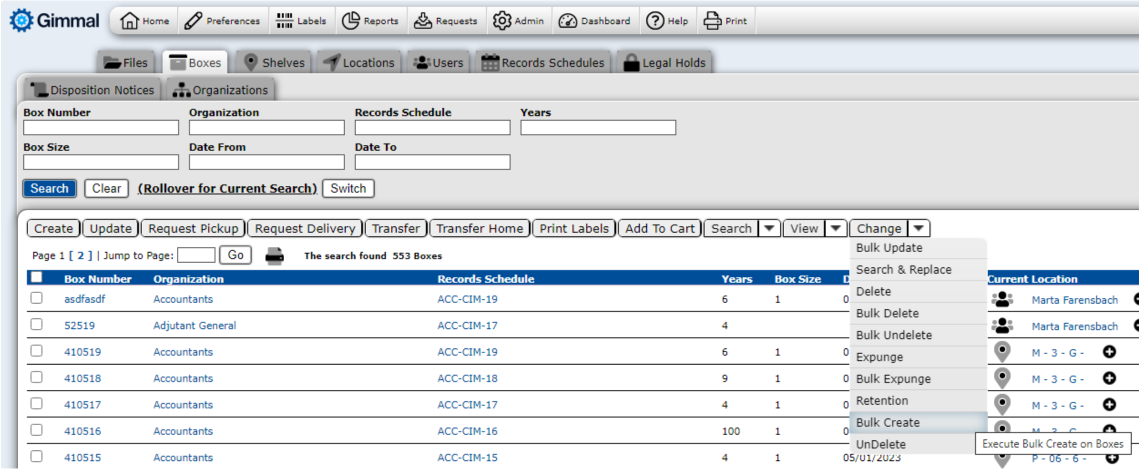
Please Note:

- Bulk Create is only available for item types that have a barcode.
- Bulk Create will fail if any combination of fields have been defined as unique (includes both 'Prevent Duplicate' and 'Unique Index' settings) for the tab.
- Bulk Creates have the potential to consume significant resources. As a result, it is recommended that large Bulk Creates be performed during off hours.

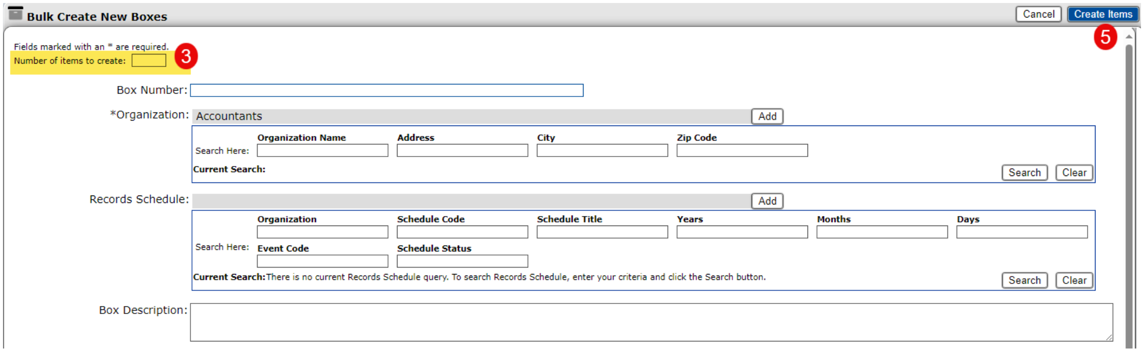
- For this feature to work properly, barcodes must be auto generated by the Gimmal Physical application.

To Bulk Create items in Gimmal Physical:

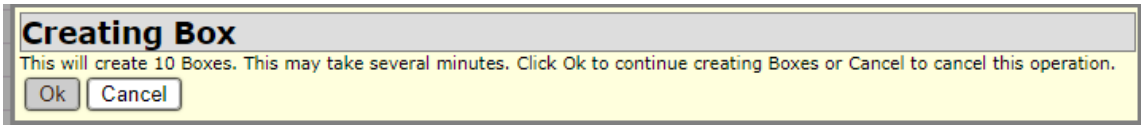
1. Select the data tab in which to bulk create the items.
2. Click on the 'Bulk Create' option. This may be located in a sub-menu of an existing Action Button.



3. The Bulk Create Item page opens. This screen is identical to a standard item creation page, except there is an option for 'Number of Items to Create'.
4. Enter the number of items to create as well as the data in the rest of the fields you wish to duplicate.
5. Click the *Create Items* button.

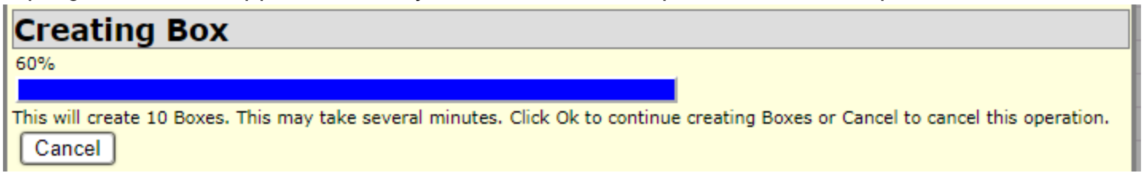


6. A pop-up box will appear to verify the bulk creation. For example, creating 10 boxes in bulk create will show:

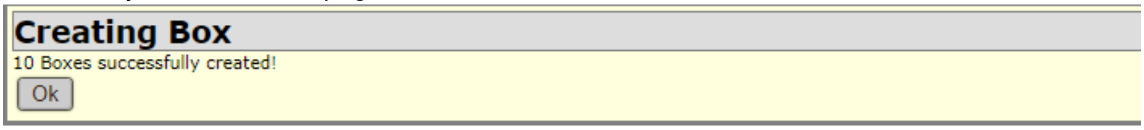


7. Click 'OK' to initiate the bulk creation.
   Note: Creating a large number of items may consume significant time.

8. A progress bar will appear. You may click ‘Cancel’ to stop the bulk create operation.



9. Once completed, a new pop-up box will appear confirming the successful creation, clicking ‘OK’ will return you to the home page.



(Legacy Help) Import File Process Guide

This topic has an interactive tutorial. To view this tutorial, click here[91].

General Information

Gimmal Physical includes several options for adding or modifying data in the application

1. Entering data via the interface, one record at a time. See Creating & Updating Records (User Interface) (see page 362) for more detail.
2. Importing multiple records via the interface using a .CSV or .TXT formatted document
3. Setting up an automated import using Gimmal FileConnect. See the FileConnect User Guide (see page 422) for more information.

This article covers the multi-record imports via the interface (#2 above).

Prerequisites

- Import files must be in UTF-8 format
- Files must be in .CSV or .TXT format
- Import Profiles must be defined before a file import can proceed
- If you are queuing labels for printing based on imported values, the Preferences | Label Printing must be to set to 'Yes'.

Configure Import Profile

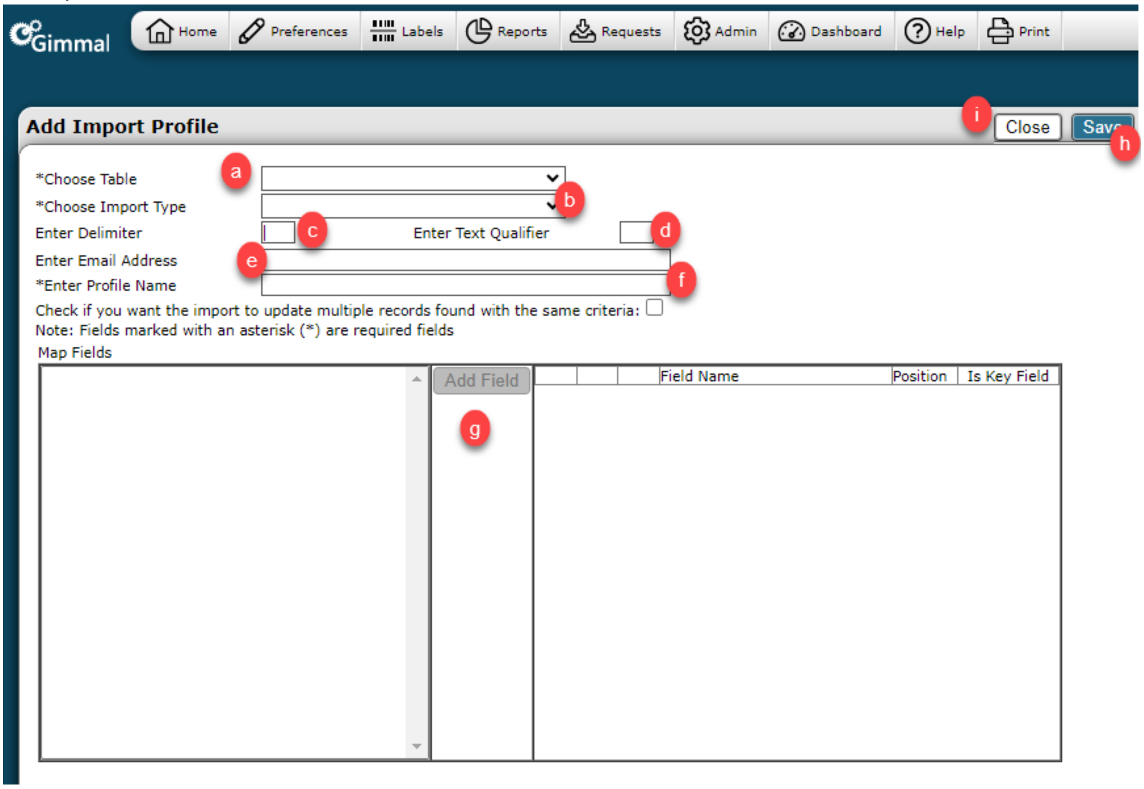
An Import Profile is a specification that tells the Gimmal Physical application how the data file is structured and where the data needs to be imported.

To configure an Import profile:

1. Click on the **Admin** link in the Navigation Menu.
2. Click on the **Import Profiles** link under ‘Configuration’ on the Administration page.

91. https://gimmal.navattic.com/w910fdc

3. Click on the **Add Profile** link on the Configure Import Profiles page. The *Add Import Profile* page will open.



4. Configure an Import Profile by following these steps:
   a. Choose the Table for which data will be imported.
   b. Choose the Import Types. Depending on the type of table, you will be given different Import Types to select from:
      i. Tables with each listed record matching just a single entry (one to one):
         1. Add – all entries will be added to the chosen table
         2. Modify – listed entries in the import file will modify entries only if they match records in the chosen table
         3. Add/Modify- listed in the import file will update entries already existing in the listed table and add new records for items that do not have a match
      ii. Tables are listed as x to y, where x and y are values linked together. Each entry can have multiple options listed in the import (many to many). Please see Many to Many Notes below for further tips.
         1. Add – new records will be added to the chosen table and the relationship between the records will be established
         2. Delete/Add – items that match the first column identifier will be cleared and items from the list re-added.
   c. Accept the default delimiter or enter another.
   d. Specify the text qualifier if applicable.
   e. Enter the email address to notify upon completion of the Import.

f. Enter a meaningful name to give this Import Profile.

g. Map Fields – Select the fields that will be used in the import file. The fields should be mapped in the order in which they will occur in the source file.
 Note, for either Add/Modify or Modify Import types, you must specify at least one field as a Key Field. You may specify multiple fields to be used in conjunction if appropriate. Gimmal Physical will use Key Fields data to determine whether to add an incoming record as new or to modify an existing record already in the application.

h. Click Save.

i. Click Close.

Importing Data from Files

Gimmal Physical offers a choice: manually import files or set up an automated import via FileConnect.

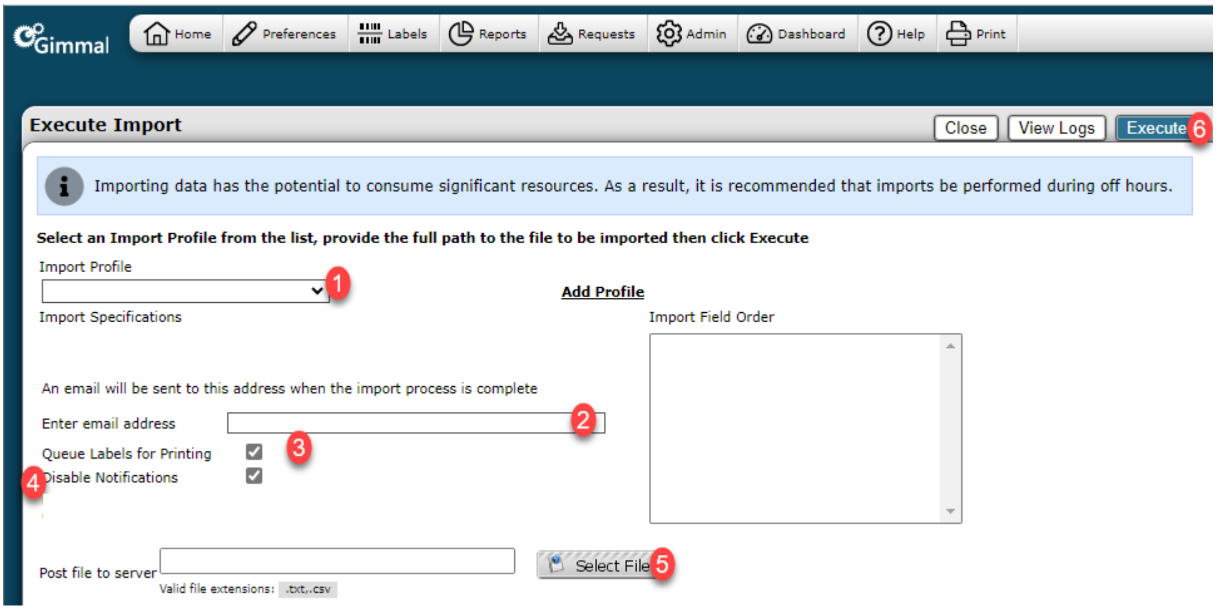
Regardless of the method, when an Import Profile is executed via an import command (manual or automated), the Import will process each line of the source file.

After the Import is complete, an email specifying the results will be sent to the specified email address. Import Logs and Import Error files will be generated, as appropriate.

Note: To execute a Gimmal Physical Import you must have a valid Import Profile. If you have not created an Import Profile, please refer to the Configure Import Profile section above.

Manually Import File

To import files one at a time manually, first navigate to the **Import** option under the 'Data' Section of the Admin Navigation Menu.



To navigate to the Execute Import page, click on the Admin Navigation Menu. Then click on the Import link on the Administration page under the Data Section.

To execute an Import profile:

1. Choose the profile to execute from the drop-down list. The Import Field Order will be populated based on the Import Profile selected.
2. To send a notification to a specific email address once the import is complete, enter the chosen address in the ‘Enter email address’ text box.
3. The 'Queue Labels for Printing' checkbox is used if labels are being printed Leave unchecked if labels are not being printed as part of the import.
4. When you import data, the application may be configured to send notifications regarding item creation, update, transfer, or other actions that an import can perform. If these notifications remain enabled, this can result in an unwanted amount of communication. We therefore suggest disabling notifications when using the imports by checking the ‘Disable Notifications’ box.
5. Choose the file to be imported by using the ‘Select File’ button.
6. Click the 'Execute' button to run the import.

Note: Imports may take some time. Review the Import logs once the import is completed. We recommend using the email option to alert you when the import is complete.

Automating a File Import

If you have data that will be updated often, it may be beneficial to automate a file import. This functionality is covered in the FileConnect User Guide.

Import Logs

The import logs and Import error files can be viewed from the Import Profile page or the *Admin > Data > Import Logs page*.

a. Search Import Logs by any of the fields provided.

b. Result Log File: This file shows the number of successful files and the files that failed. If there are errors, this file explains the errors.

c. Result Error File: This file is a copy of the errors that failed. The errors can be corrected within the error file and re-imported.
Note: Even though Gimmal Physical will generate an error file if you use column headers, we still recommend the use of column headers to help identify the individual columns for troubleshooting purposes.

Import Tips

1. If you are importing Files and/or Boxes, ensure any related higher-level data is already present in the application before starting the importing process. It is best to work down the hierarchy within the application. An example hierarchy beginning at the highest level:
   - Organizations
     - Record Schedules
       - Locations
         - Shelves
           - Boxes
             - Files

2. Quick Descriptions should be used for the following logical tabs: Organization and Record Schedules.
3. A barcode should be used for the Current and Home Location.
4. Access to Import functionality is controlled under the Roles and Permissions.
5. List Values need to be added before importing. See below for adding list values.
6. Required fields must be included in the Import Profile.
7. Any data that is a Tab or a List can be imported into the application via the Import Profile.
8. If you want the application to automatically assign barcodes for newly created items, do not add the barcode to your Import Profile. However, keep in mind that:
    a. Your application must be configured to automatically add barcodes for new items
    b. Barcodes are often required when using a Many to Many Import
9. Add an “Ignore” value if you have columns in your CSV file that are not needed in the current Import Profile. When you proceed with executing the Import, the Ignore field will also appear in the Field Order, however, the values will not be imported.
10. Scheduling of imports can only be accomplished via the FileConnect Utility, not from within the Gimmal Physical interface.

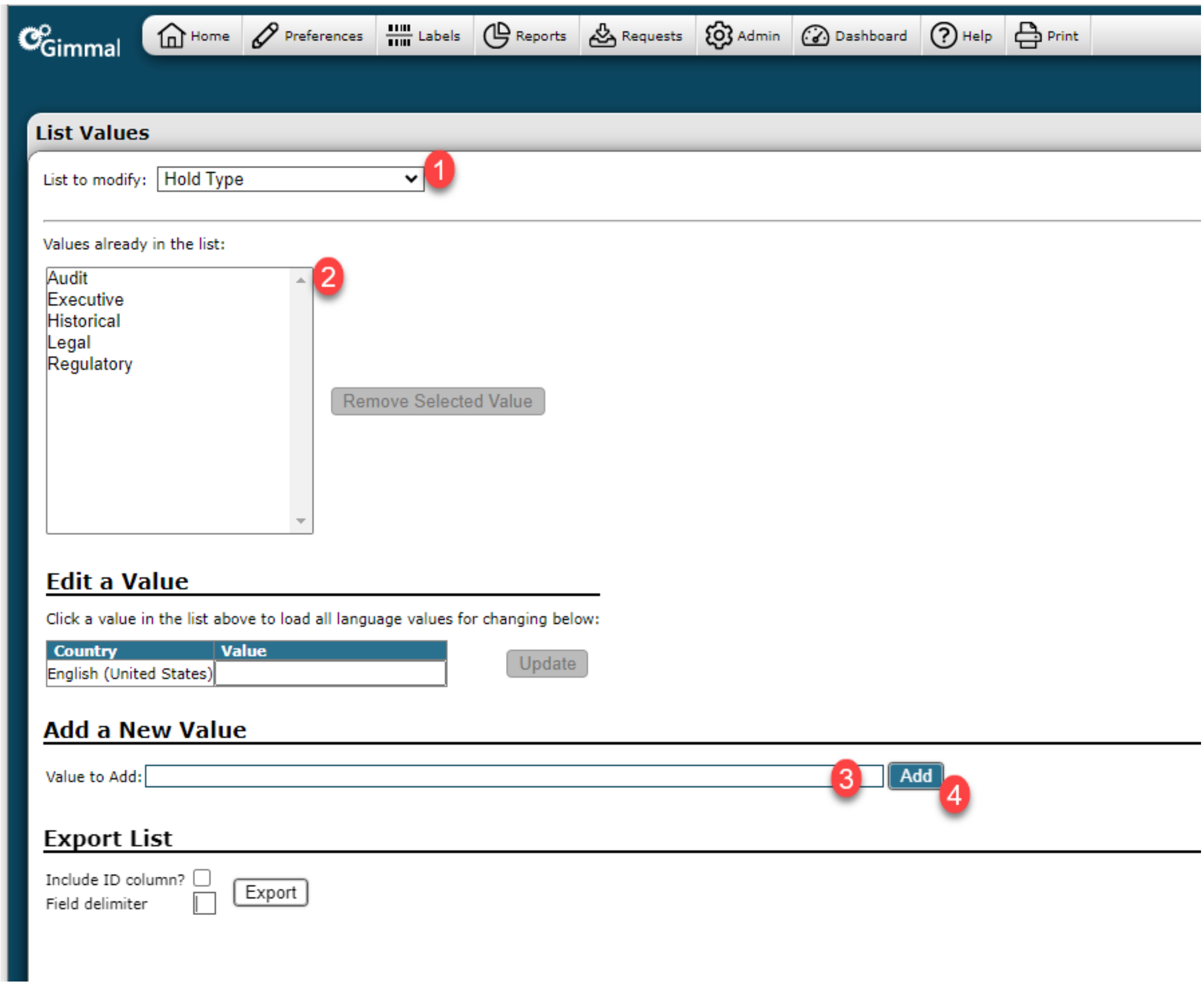
Many to Many Notes

- Only tables whose schema supports Many to Many will show in the ‘Choose Table’ List alongside traditional single level tab imports
- The Quick Description is used for the source key field in Many to Many Imports. If the Quick Description is set to something other than the key field (and only that field), the Many to Many import will not work.

Adding List Values

The list values can be added at *Admin > Data > List Values*. To add values to the simple list,

1. Select the appropriate list from the "List to Modify" drop down box.
2. If you wish to edit an existing value, select it in the ‘Values already in the list” control.
3. Type the values you wish to add in the 'Value to Add' text box.
4. Finally, click the 'Add' button or press the enter key.



Questions

Please direct any questions to the Gimmal Technical Support Team at support@gimmal.com[92].

4.6.1.4.1.4 (Legacy Help) Changing User Password

This article refers to changing a user password for organizations using basic authentication.

Please Note: Many organizations will use a Single Sign On method for authentications which is covered under Technical Specifications, not in this article.

A user must be logged in to change a password. There are two ways a user's password may be changed:

- A user account can change their own password
- An administrator changing user passwords

Changing Password from a User Account

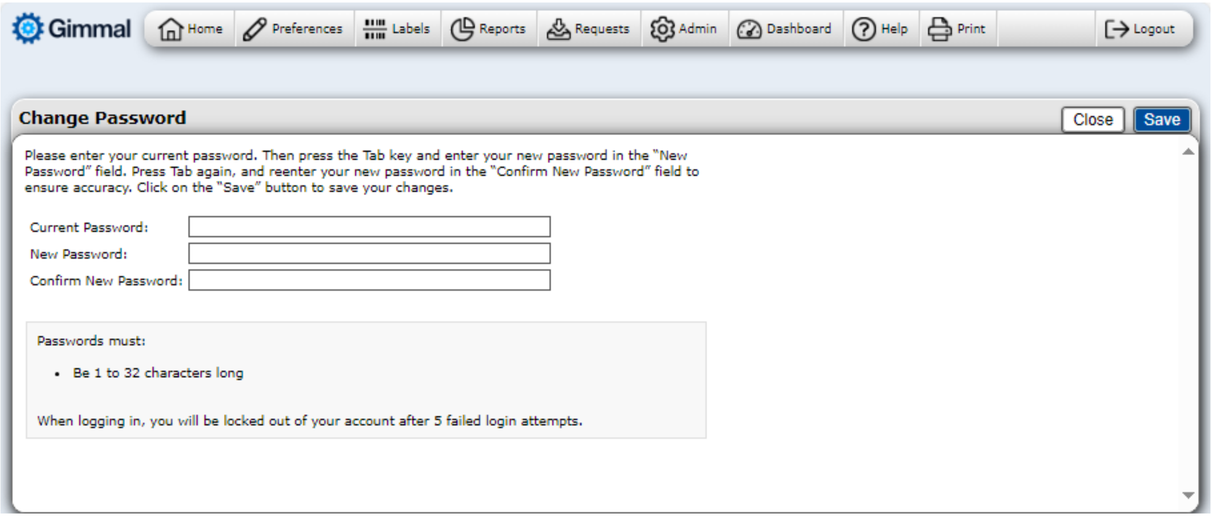
Each user has the ability to change their own password. To do so:

92. mailto:support@gimmal.com

1. Click Admin from the Navigation Menu link to open the Administration page
2. Click the Change Password link to open the Change Password screen.
3. Populate the required fields:
    a. Current Password: Enter your current password.
    b. New Password: Enter the desired new password
    c. Confirm New Password: Enter the desired new password again to confirm.
4. Click the ‘Save’ button to save the new password.

Note:

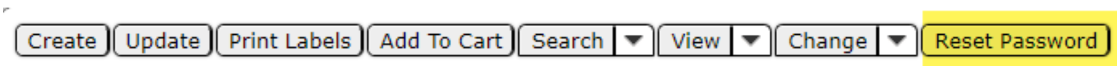
- The rules for passwords listed at the bottom of the screen are set by your System Administrator.



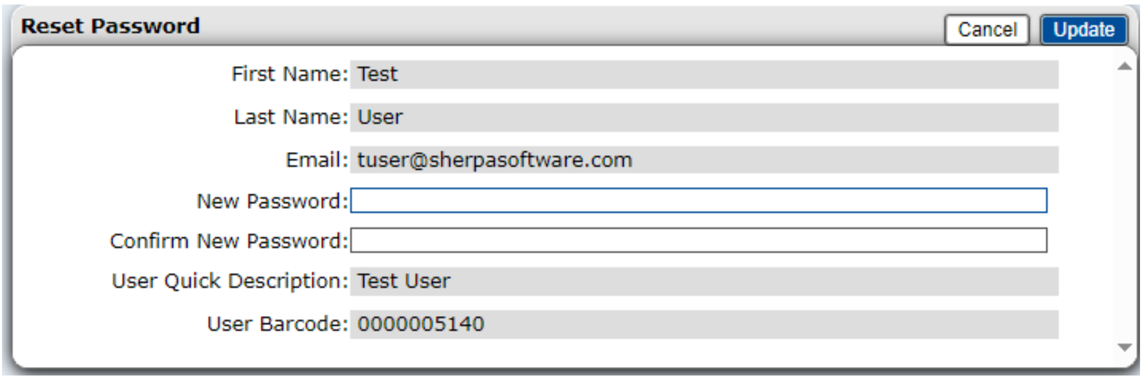
Changing User Password from a Privileged Account

Users with appropriate security privileges (typically administrators) can change passwords for other users. If an account has the appropriate rights to reset another user's password, the functionality will be displayed as an action button on the User tab.

1. Navigate to the User tab from the home page screen.
2. Query and then select the user whose password you would like to change.
3. Click the ‘Reset Password’ button from the action menu on the home page screen, or view the user and click ‘Reset Password’ button.



4. On the Reset Password screen enter the require information
    a. New Password: Enter the desired new password
    b. Confirm New Password: Enter the desired new password again to confirm.
5. Click the 'Update' button.



Note:
Administrators have the option to force a new password to be generated. This is typically done to prompt a new user to change their password after they have been first added to the system.

4.6.1.4.1.5 (Legacy Help) Requesting Items

Requesting provides a way for end-users to request either pick-up or delivery of items.

- (Legacy Help) Request Items for Pickup (see page 375)
- (Legacy Help) Request Items for Delivery (see page 377)
- (Legacy Help) Review Requests (see page 379)

This topic has an interactive tutorial. To view it, click here[93].

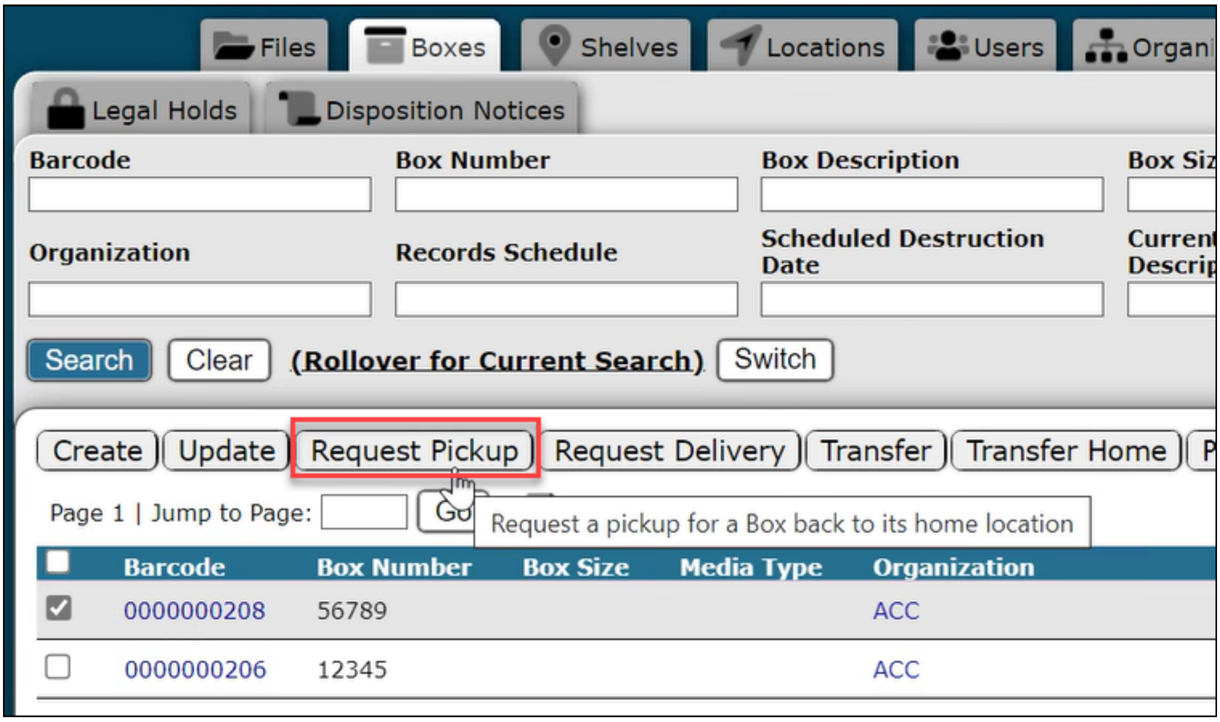
(Legacy Help) Request Items for Pickup

A Pickup Request (sometimes known as a 'Refile Request') is used for adding new boxes to a permanent location or returning boxes to their Home Location.

To submit a Pickup Request:

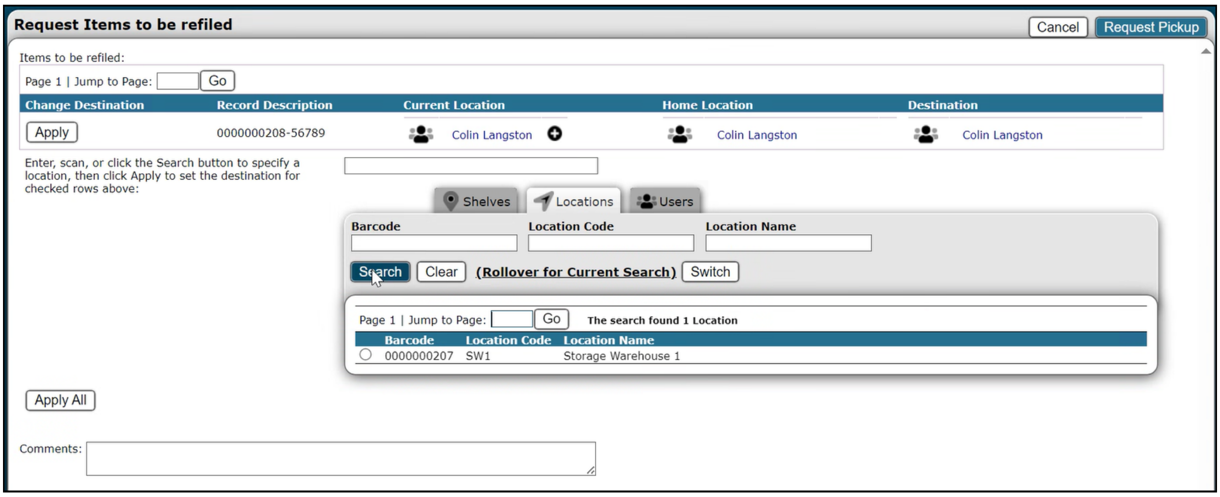
1. Locate the desired item(s) using your preferred search techniques.
2. Check the box for each desired item and click **Request Pickup**.
    a. Alternatively, you can click **Add To Cart** if a single search is not sufficient. In your cart, check the box for each desired item and click **Request Pickup**. See for more information.

93. https://gimmal.navattic.com/gl10s6b



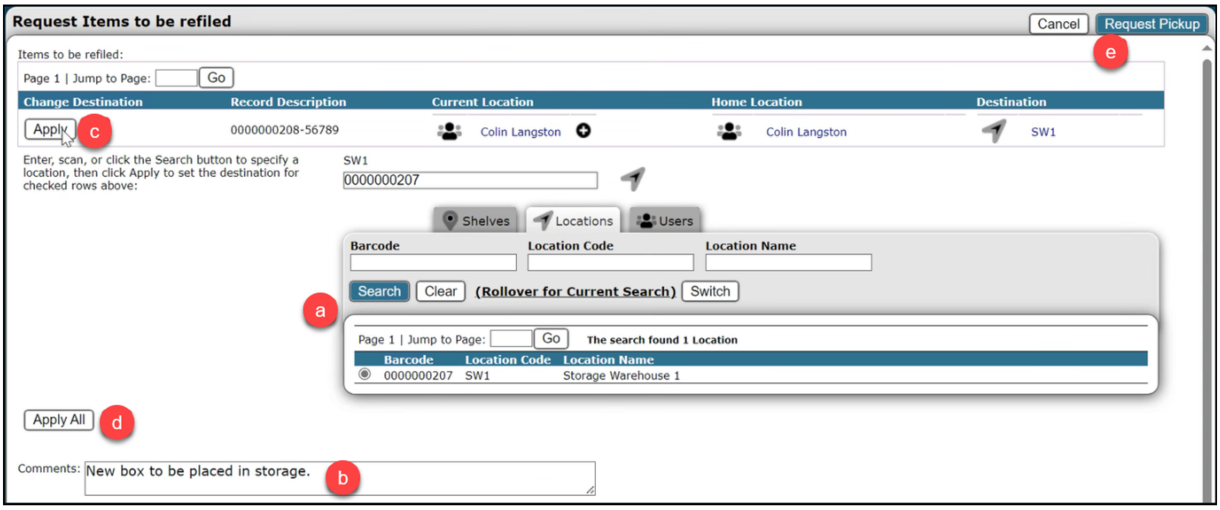
31 Requesting pickup for a box

3. The **Request Items to be refiled** page displays

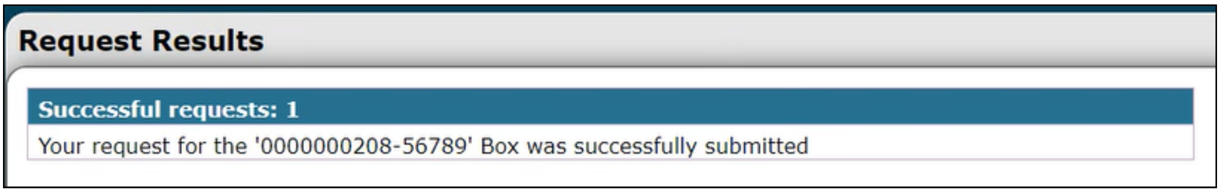


4. Perform the following steps to complete the request:
    a. Search for, and select, the destination you want the pickup items to be taken to. Note:
        i. Make sure you have selected the correct tab (i.e. Shelves, Locations, Users).
        ii. The barcode of the selected destination displays in the text box above the tabs.
        iii. Depending on your application preferences, a default destination may already be specified (this can be changed in Preferences, as needed).
    b. Enter any comments that need to be provided for the item history.

   c. Click **Apply** to update the Destination for the requested item (see below). Note that the **Record Description** is the Quick Description for the requested item(s).
   d. If multiple items are requested, you can update the Destination for all of them by clicking **Apply All**.
   e. Finally, click **Request Pickup** to submit the request for review.



5. Click **Ok** to dismiss the **Request Results** page

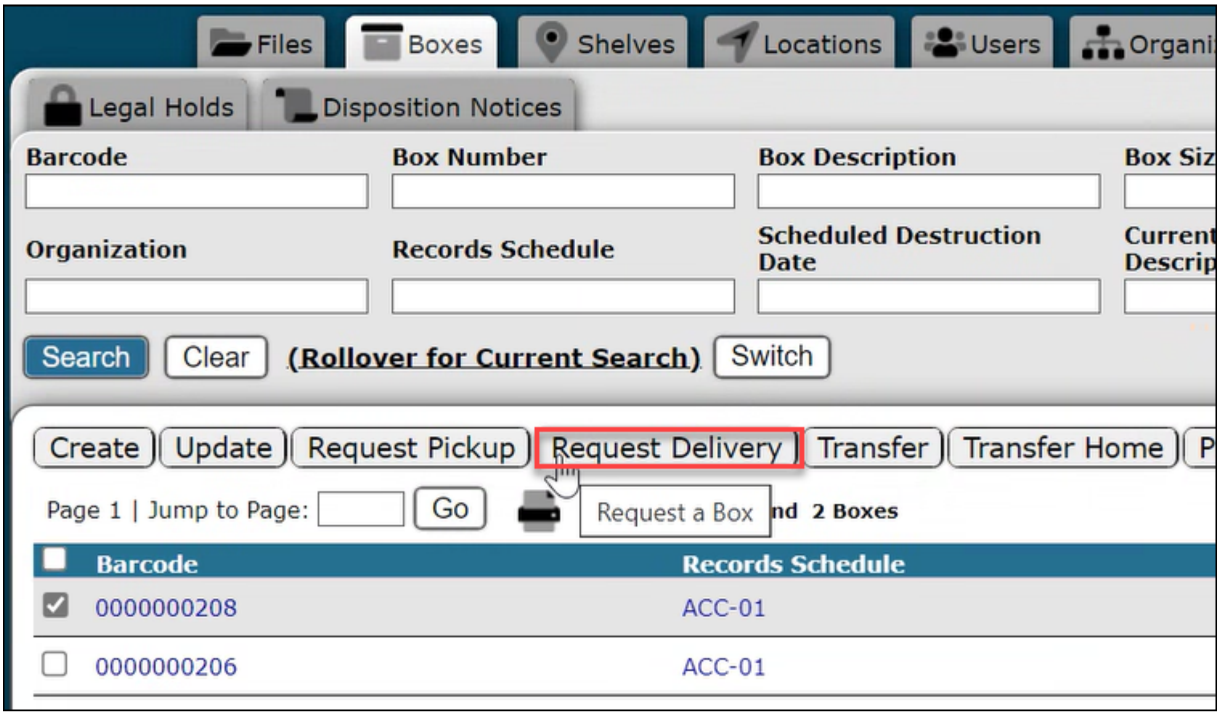


32 Request successfully submitted

(Legacy Help) Request Items for Delivery

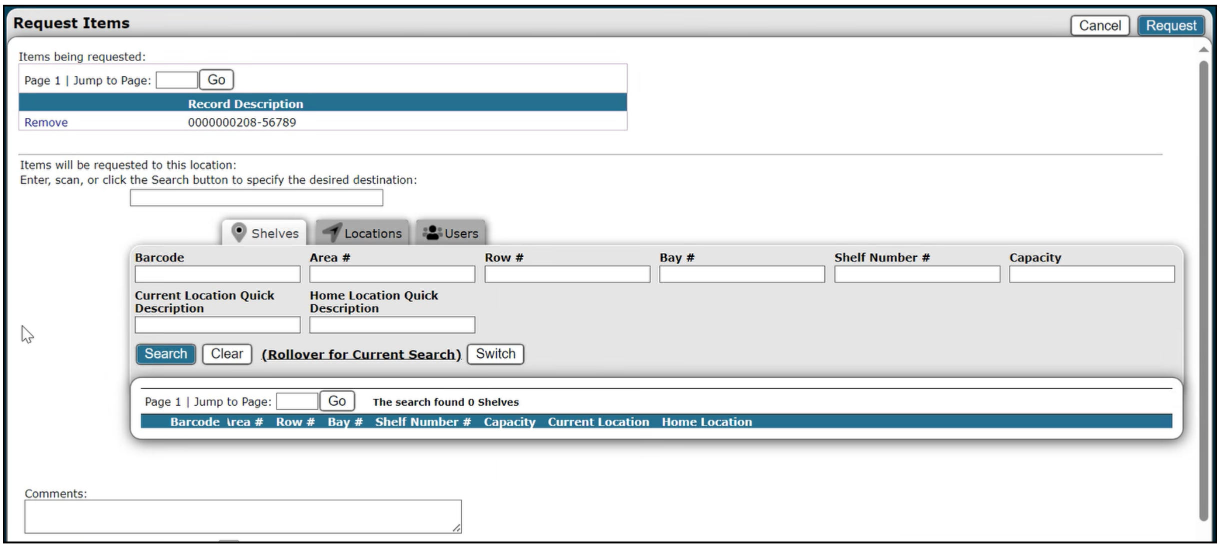
Delivery Requests are typically initiated to request an item to be transferred to a specific user's location. To submit a delivery request:

1. Locate the desired item(s) using your preferred search techniques.
2. Check the box for each desired item and click **Request Delivery**.
   a. Alternatively, you can click **Add To Cart** if a single search is not sufficient. In your cart, check the box for each desired item and click **Request Delivery**. See for more information.



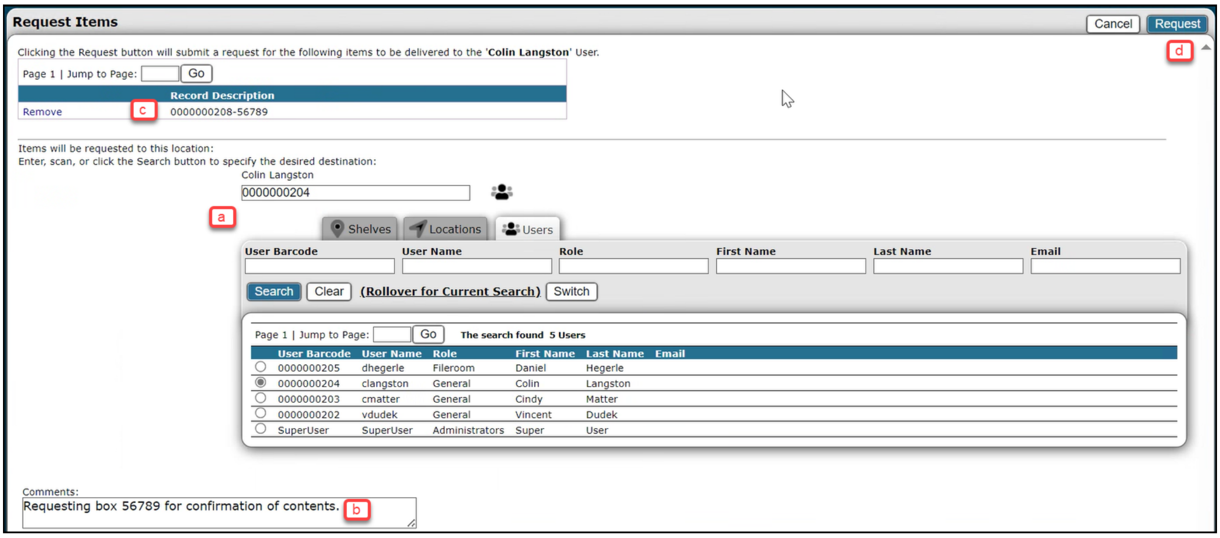
33 Requesting delivery of a box

3. The **Request Items** page displays



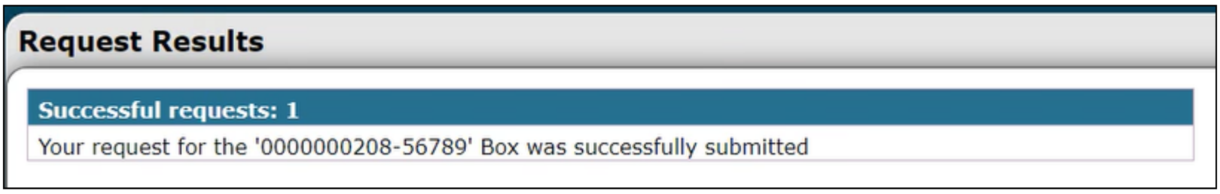
4. Perform the following steps to complete the request:
   a. Search for, and select, the destination you want the requested item(s) delivered to.
      i. Make sure you have selected the correct tab (i.e. Shelves, Locations, Users).
      ii. The barcode of the selected destination displays in the text box above the tabs.
      iii. Depending on your application preferences, a default destination may already be specified (this can be changed in Preferences, as needed).
   b. Enter any comments that need to be provided for the item history.

c. Note that the **Record Description** is the Quick Description for the requested item(s).
d. Finally, click **Request** to submit the request for review.



34 Delivery request ready to submit

5. Click **Ok** to dismiss the **Request Results** page

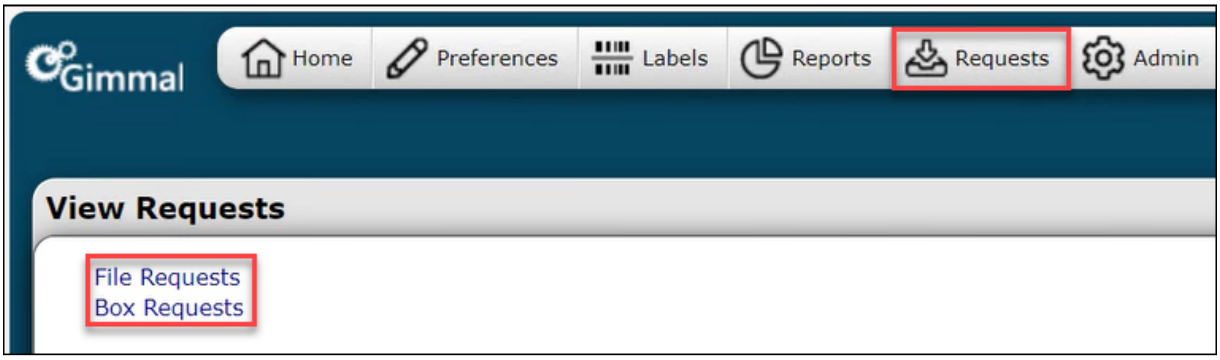


35 Request successfully submitted

(Legacy Help) Review Requests

When pickup and delivery requests are submitted, they are added to the Requests page (based on item type, i.e., Files or Boxes) to be reviewed, approved, and fulfilled by a user with sufficient privileges.

To review submitted requests click **Requests** in the navigation menu, then click the link for the desired item type. This displays the **View Requests** page. There will be links listed on this page for each type of item that can be requested. In this case, the File and Box Requests links are listed, but you may see others depending on your configuration.

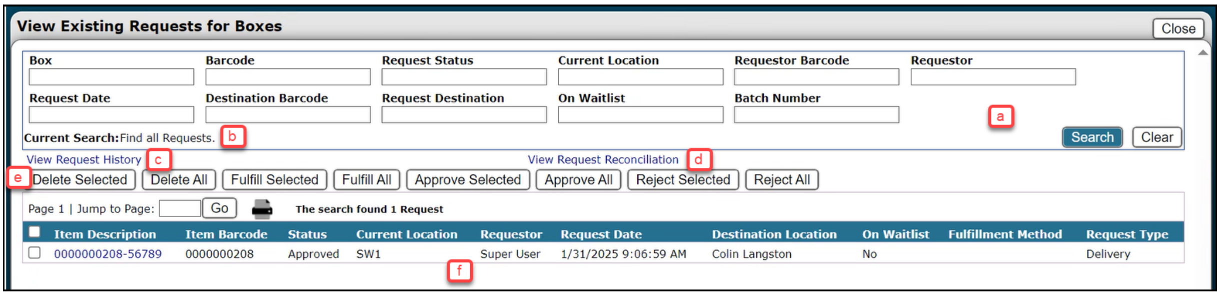


36 View Requests page

> If enabled, the review and submitting of requests for items stored in Iron Mountain or O'Neil have to follow a different process. Please review the appropriate guide (Iron Mountain[94], O'Neil[95]) for more details.

View Existing Requests

The **View Existing Requests for Boxes** (or Files) page is where review, approval, and fulfillment of requests takes place. By default, Gimmal Physical displays all requests for which you have permission/access. If desired, this list can be reduced by using the Quick Search fields above the grid.



This page includes the following:

1. Quick Search **(a)**- Used to parse through the existing item requests and functions the same way as the Quick Search on the individual Item tabs, including the same search operators. Current Search **(b)** describes the last search that was executed. Clicking Search with no criteria entered will return all current requests (see note below). Clear simply removes all search criteria from the Quick Search fields.
2. View Request History **(c)** - Displays the **Request History** page where you can search through, and export, previous request entries.
3. View Request Reconciliation **(d)** - Click the **View Request Reconciliation** link to view the outcome of requests, either by date or if importing requests from another system, by batch number.
4. Action buttons **(e)** - perform the indicated actions on selected, or all, requests.

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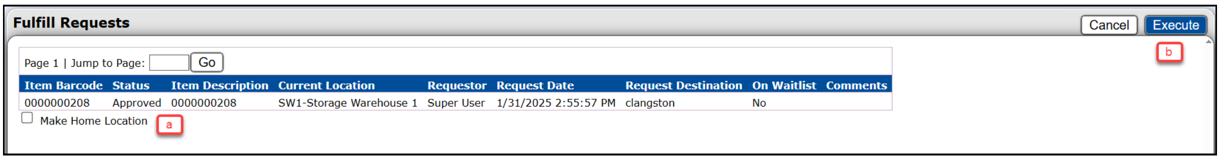
94. https://docs.gimmal.com/gp/user-guide-for-iron-mountain-integration
95. https://docs.gimmal.com/gp/user-guide-for-o-neil-bridge-integration

a. **Delete Selected/All**: Delete the selected request(s) or all requests
b. **Fulfill Selected/All**: Fulfill the selected request(s) or all requests. Once fulfilled, requested items are automatically transferred to the requested destination, and the request itself is deleted from the Review Existing Requests page.
c. **Approve Selected/All**: Approve the selected request(s) or all requests. Depending on your application preferences, this may not be applicable (i.e. requests are automatically approved)
d. **Reject Selected/All**: Reject the selected request(s) or all requests

5. Requests/Search results **(f)** - Existing item requests. The fields are:
   - **Item Description**: Quick description of the requested item.
   - **Barcode**: Barcode of the requested items.
   - **Status**: Approval status of the request. Requests can be auto-approved based on your preferences. See for more information.
   - **Current Location**: Current Location of the requested item.
   - **Requestor**: Who actually submitted the request.
   - **Request Date**: The date and time the request was created.
   - **Destination**: Where is the requested item going to.
   - **On Waitlist**: Item requests are automatically added to the waitlist if there is already a request for the item or if the item is not at its Home Location. When an item is placed on the waitlist because it is checked out to a user, an email notification (if your system notifications are so configured) is sent to that person. Once all prior requests for this item have been fulfilled/it is returned to its Home Location, the request is removed from the waitlist and ready to be fulfilled.
   - **Fulfillment Method**: How this request should be fulfilled (specified during the initial request submission)
   - **Request Type**: Type of item request, i.e. Pickup or Delivery

Fulfilling requests

Clicking **Fulfill Selected** or **Select All** displays the **Fulfill Requests** page. Checking the box **Make Home Location (a)**, sets the destination as the item's Home Location. Click **Execute (b)**to fulfill the request.



Only non-waitlisted requests will appear on the Standard Picklist Reports[96] (See Reports[97] for additional information). All current requests, including those that have been waitlisted, can be viewed on the **View Existing Requests** page.

96. https://gimmal.atlassian.net/wiki/spaces/PHHG/pages/140476430/Picklist+Report

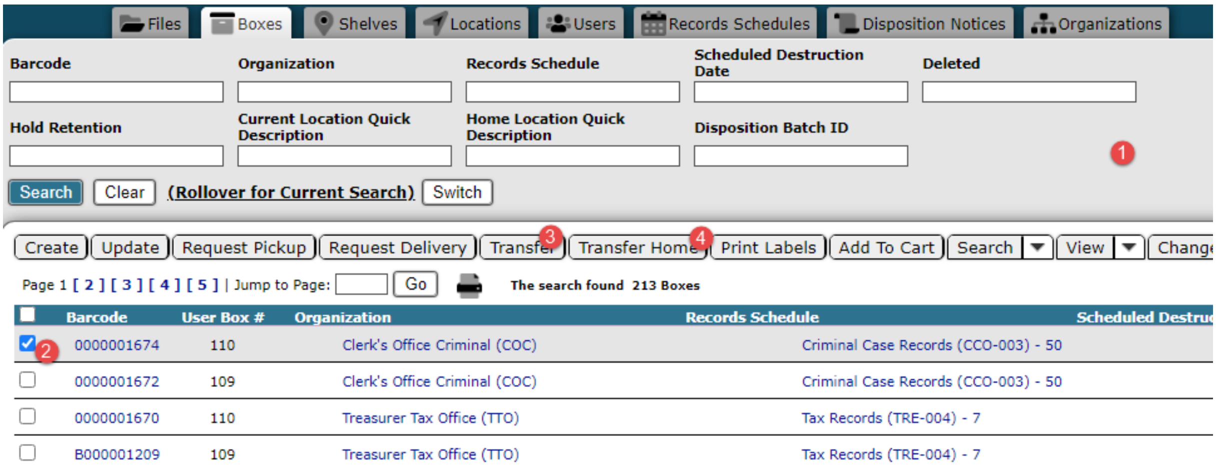
Visibility of Requests

1. Organizational Security/Security Exclude - Organizational security will control the visibility of requests based on the item's and User's associated organizations. Users with Security Exclude enabled, regardless of their role, can see all requests regardless of the item's associated Organization.
2. Hub Locations - if hub locations are used in your application (contact Gimmal Support or your Gimmal Account Manager), Users processing requests will only see requests for items associated with the same hub location with which the user is also associated, as well as requests for items not associated with a hub location. In addition, Users processing requests will also see requests for items not associated with any hub location.

4.6.1.4.1.6 (Legacy Help) Transferring Records

***This topic has an interactive tutorial. To view this tutorial,* click here[98].**

There are several methods for transferring records via the Gimmal Physical interface.

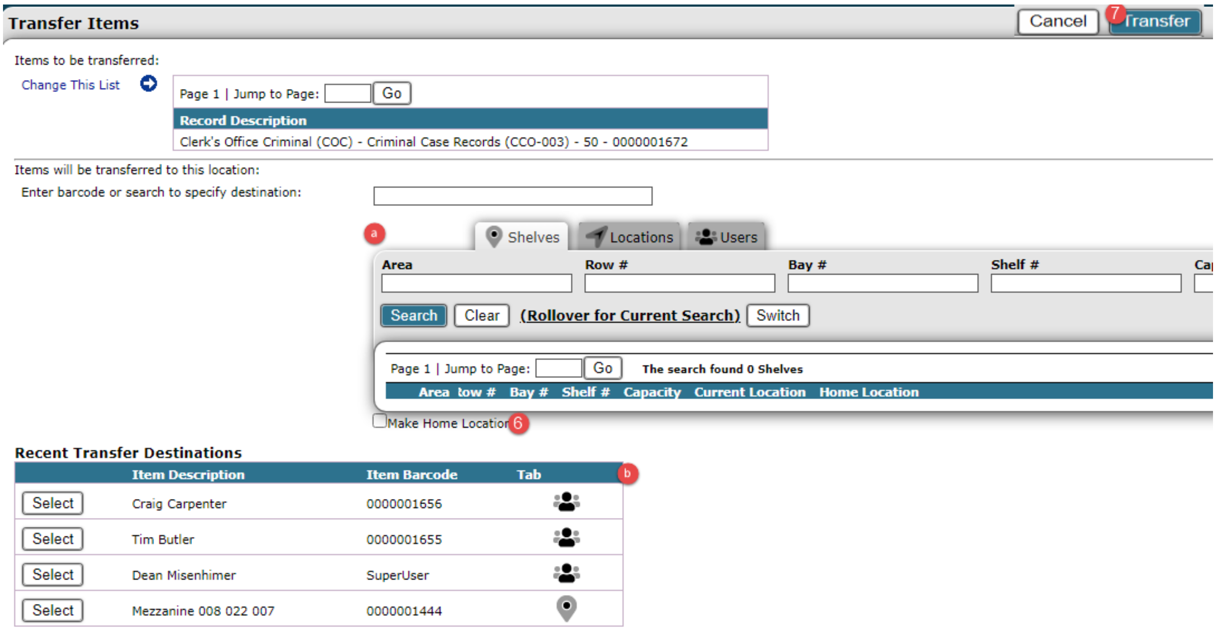


Use the following option to transfer records in Gimmal Physical:

1. Locate the desired items using one of the integrated search options.
2. For each item you wish to transfer, click the associated checkbox.
3. Click the 'Transfer' button. This opens the 'Transfer Items' screen (see step 5 below)
   Note: An alternative is to use the 'Transfer Home' option which will automatically use the home destination for the transfer. If used, skip to Step 6.
4. Specify the Transfer Destination. This may be done by:
   a. Selecting the destination from the list of recently used destinations,
   b. Clicking on the Search button and selecting the desired destination from an available list (e.g. Shelves, Locations, Users)

97. https://gimmal.atlassian.net/wiki/spaces/PHHG/pages/140083269/Reports+Overview
98. https://gimmal.navattic.com/hf10r69

5. Clicking the ‘Make Home Location’ option will update the Home Location value for the selected items being transferred to the option chosen for the transfer location.
6. Click the Transfer button to process the transfer.

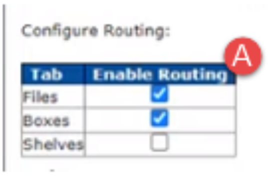


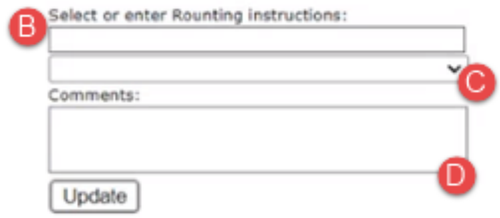
> Transfers can also be performed using a tethered (see page 448)or portable (see page 426) barcode scanner.

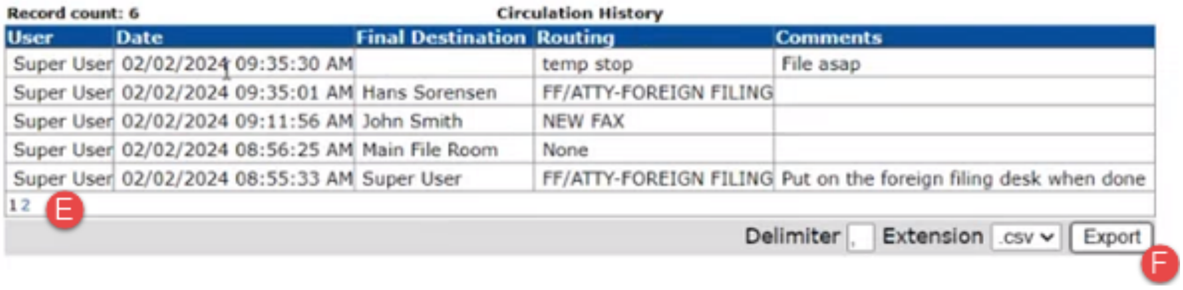
Circulation Routing & History

Users seeking to store and audit more granular details when transferring items can enable Circulation Routing. This can be helpful for recording additional steps taken between locations or adding extra notes for a given transfer.

> - This functionality is not available in versions of Gimmal Physical older than 3.15.
> - To enable this functionality, admins with the appropriate permissions must first navigate to the Admin | Field Display - Advanced and choose ‘Enable Routing’ (A) for the requisite Tabs. This option is limited to items that can be transferred (e.g. Files or Boxes).







Record count: 6

Circulation History

User	Date	Final Destination	Routing	Comments
Super User	02/02/2024 09:35:30 AM		temp stop	File asap
Super User	02/02/2024 09:35:01 AM	Hans Sorensen	FF/ATTY-FOREIGN FILING	
Super User	02/02/2024 09:11:56 AM	John Smith	NEW FAX	
Super User	02/02/2024 08:56:25 AM	Main File Room	None	
Super User	02/02/2024 08:55:33 AM	Super User	FF/ATTY-FOREIGN FILING	Put on the foreign filing desk when done

Circulation Routing

Once enabled, the Circulation Routing control (B) will appear on the Tabs chosen in the Advanced Field display. The control consists of three parts:

1. Routing information. This can be manually entered, or chosen from the drop down list. The dropdown list values are controlled via the List Values option on the Administration page.
2. Free form Comments can be added to give further detail to this transfer.
3. An 'Update' button which will save the information to the Circulation History.

When the Transfer button is clicked, the routing information and comments entered on this page will be stored as part of the circulation history for this item.

> The list values for the routing can be added at *Admin | Data | List Values*.

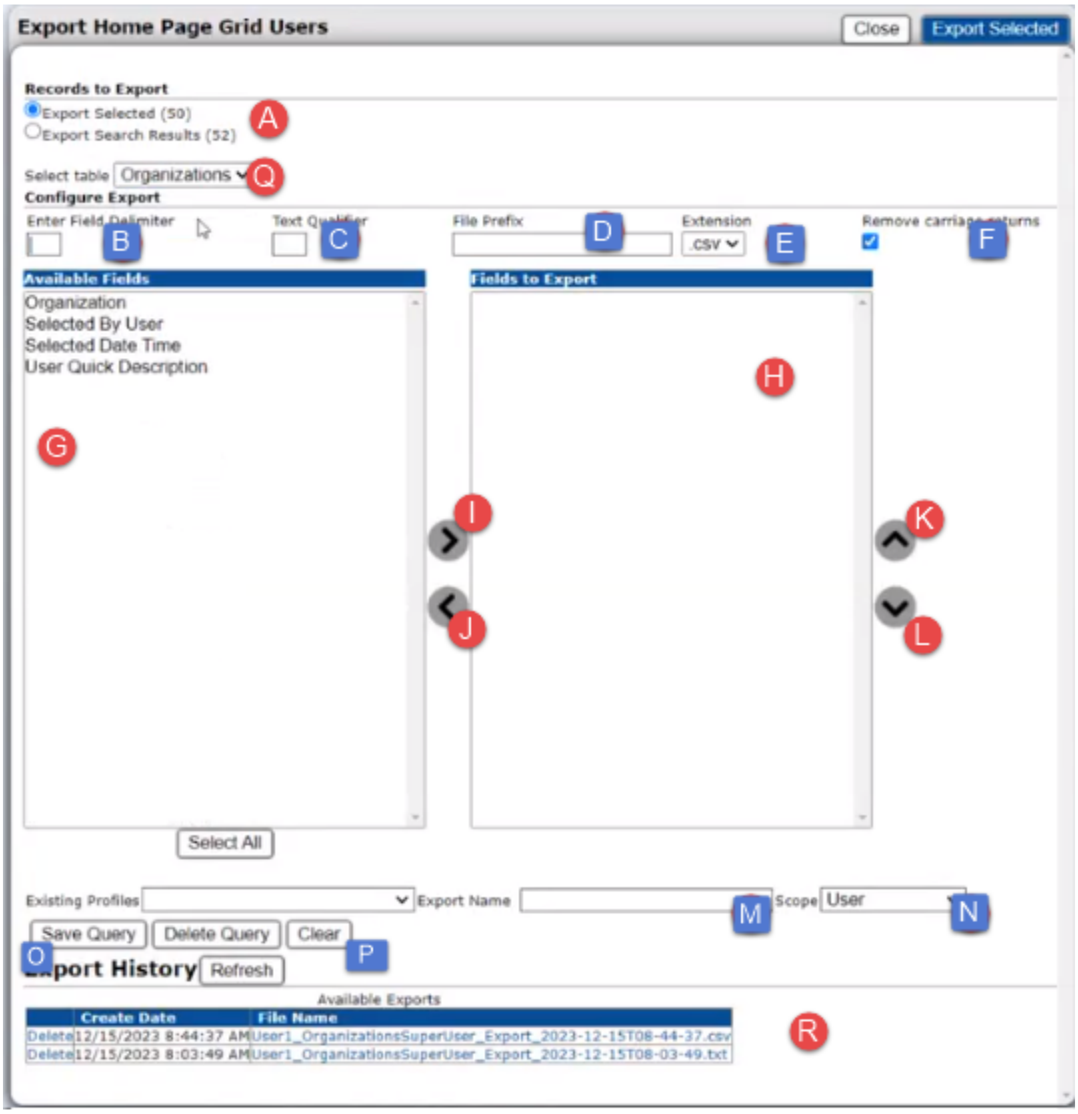
Circulation History

Circulation history reflects all the routing entries that have been assigned for a given record. It is visible only on the View page for that record (E). The Circulation History table is paginated showing five records on a screen. Click the page number links to move between pages. Records with the most recent transfer are shown at the top of the list.

The Circulation History for a given record can be exported using the 'Export' button (F). Users can choose a delimiter which will separate the fields in the exported file as well as the format for export (.csv or .txt)

4.6.1.4.1.7 (Legacy Help) Exporting

Gimmal Physical provides options for records displayed in any home page grid to be exported to an external file.



Not all features are available in older versions of Gimmal Physical. Please contact support at support@gimmal.com[99] for any questions related to exporting in versions 3.14 and below.

Create a New Export

1. Click on the ‘Export' Action Button after finding the items you would like to include in the file. This opens the 'Export Home Page Grid' screen for that tab.
2. Choose which records you would like to export (A):
    a. ‘Export Selected’ will export only the items whose checkbox was selected on the Home Page grid.

99. mailto:support@gimmal.com

   b. 'Export Search Results' will export all the results of the query whether they are selected or not.
3. Configure the Export format:
   a. If desired, enter a field delimiter (B). Leave this field blank to use the system defaults.
   b. If needed, enter a text qualifier (C). Leave this field blank for system defaults (suggested).
   c. The created file will be given a system generated name, however, a prefix (D) can be added to the file name by entering text in this field.
   d. Choose the file type (E) for export. Note: .CSV can be used with spreadsheet tools such as Excel
   e. The 'Remove carriage returns' option (F) is on by default but may be disabled for troubleshooting.
4. Manage the fields to export:
   a. Selecting the chosen field from the list of fields available for export (G) and clicking the > arrow (I). This will put the field name in the Export fields list (H).
   b. To remove a field from the Export list (H), select the field and choose the **<** arrow (J) to move it back to the Available Fields list (G).
   c. To change the order, select the field and use the up (K) and down (L) arrows to maneuver the selected field.
5. Click on the 'Export Selected' button.

- It may take a few minutes for the new export file to appear in the 'Available Exports' list (R).
- The 'Clear' button (P) can be used at any time to reset all options.
- The 'Select table' drop down (Q) is only used when exporting data from many to many controls. The default value is the name of the tab.

Exporting data from Many to Many controls

Items in a many-to-many relationship (e.g. Users/Organizations) require an extra step in choosing the correct table.

1. Follow the steps above, however, after choosing the configuration options (Step 3), you must select the required table from the 'Select table' dropdown (Q). This will add the available many to many relationship fields to the Available Fields list (G) for this export file.
2. Continue with the configuration as noted in the steps above.

An export which includes a many-to-many relationship will have one record per line for each many to many relationship, e.g.

- Box 1 | Type A
- Box 1 | Type B
- Box 1 | Type C

- Box 2 | Type A
- Box 2 | Type D

Save an Export to a Profile

You can save the configuration of an export to a profile for future use.

1. Enter the export details as listed in the ‘Create a New Export’ section above.
2. Enter the 'Export Name' (M) by which this export profile will be known.
3. With the proper permissions, a Scope can be selected from the ‘Scope’ dropdown list (N) to determine who can see this profile.
    a. User - only the logged in user can see this export profile
    b. Role - all members of the role of the logged in user can see this export profile
    c. System - all users can see this export profile
4. Click on the ‘Save Query’ option to save the profile (O).

Using an Existing Export Profile

To use a profile that has already been created:

1. Click on the ‘Export' Action Button from the Home Page Grid to open the Export Home Page Grid screen for that tab.
2. Choose the existing export profile from the ‘Existing Profile' dropdown list.
3. Verify the options selected.
4. Click on the ‘Save Query’ option to save the profile (O).

Removing an Existing Export Profile

With the proper permissions, you can remove an export profile from the list:

1. Click on the ‘Export' Action Button from the Home Page Grid to open the Export Home Page Grid screen for that tab.
2. Choose the existing export profile from the ‘Existing Profile' dropdown list.
3. Click on the ‘Delete Query’ button to remove the profile from the list.
4. Click ‘OK’ on the verification.
5. The profile will be removed from the list

Available Exports

The list of available exports (R) shows the files which have been exported for this particular grid.

1. The ‘Delete’ link will remove the file
2. The ‘Created Date’ is the date the export was created
3. The ‘File Name’ provides a clickable link to open or download the selected file.

Depending on the volume of records being exported, it may take a while for an export file to appear in this list. Clicking 'Refresh' will update the list with recent entries.

4.6.1.4.1.8 (Legacy Help) Search Overview

This topic has an interactive tutorial. To view it, click here[100].

Gimmal Physical organizes information into tabs (e.g. Boxes Tab, Locations Tab, Users Tab, etc.). The contents of any of these tabs can be searched using several methods to help locate the exact data you seek.

Note: In our examples below we will be looking at Boxes, but the same information is valid for any item type.

Helpful Tip
Wildcard behavior can be controlled in Preferences | Application 'Wild Card Behavior'. Available options include:

- No Implied Wildcards: The terms entered must match the entire field to match. Wildcards must be explicitly added to the field if they need to be used.
- Auto Ending Wildcards: The % wildcard is implicitly used at the end of the entered term. This means the term will be found if it is at the beginning of the selected field value, regardless of how many characters are after it.
- Auto Beginning and Ending Wildcards: The % wildcard is implicitly used at the beginning and end of the entered term. This means any field containing the term that is entered will be returned. This is regardless of whether the additional characters are before or after the searched term in the field.

If you use wildcards as part of your search query, they will override any application-level wildcard preferences.

Searching

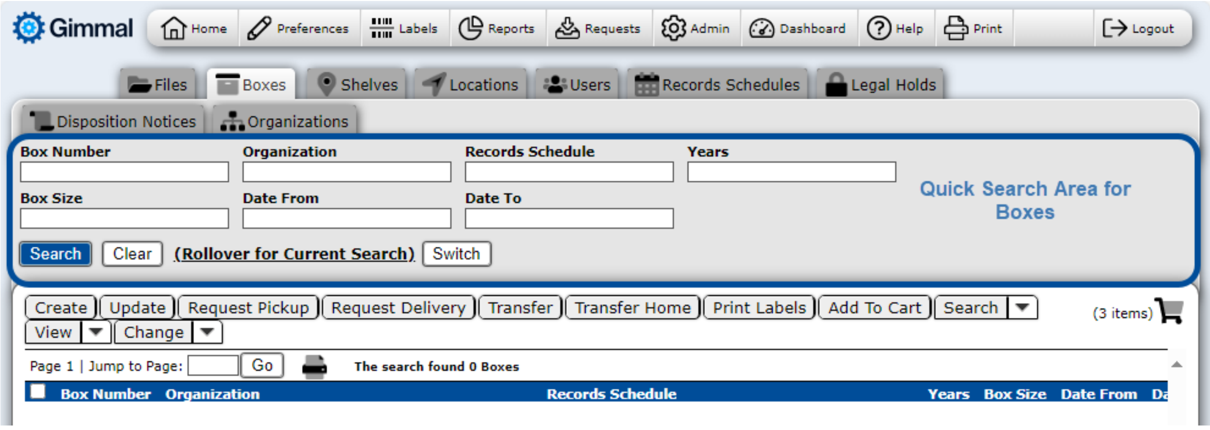
Quick Search

The default search view is the quickest and easiest way to search for items, especially if switched to the 'Full Text Search' option.

There is a Quick Search area for each type of item tracked in Gimmal Physical. It is located at the top of the appropriate tab. To access the quick search, first click on the tab you would like to search.

An example of the quick search area for a Gimmal Physical system tracking Boxes is below. You'll see there are several fields that are available for searching. These fields are configured by the System Administrator.

100. https://gimmal.navattic.com/yo201gc



To use the Quick Search, enter a value for the field or fields by which you would like to search. Click 'Enter' on your keyboard or click the 'Search' button to run the query.

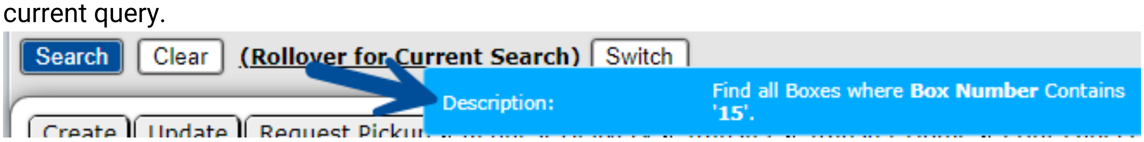
Note:

- Search results will include only those records where ALL search criteria match.
- The number of matching records will be displayed at the top of the results grid along with a pagination control when applicable.

Helpful Hint
Clicking 'Search' without entering any search criteria displays all the records that your security privileges permit you to see.

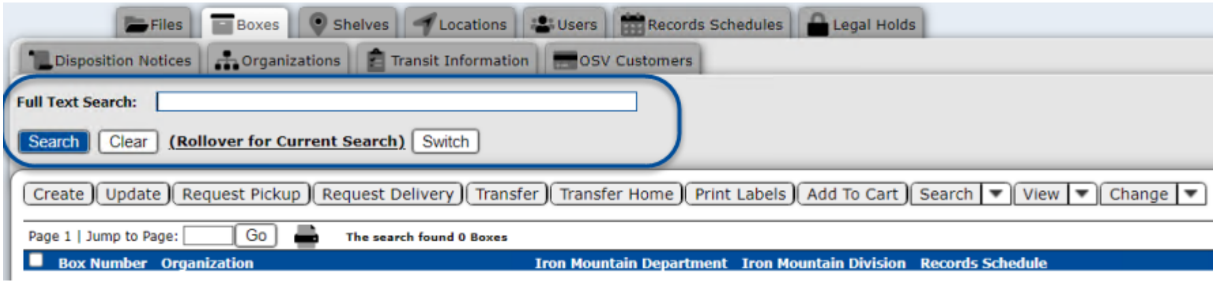
Other Buttons and links:

- **Clear** will remove all text from the Quick search fields and reset the result list to show no entries.
- **Switch** will change from Quick Search query by field search to the ***Full Text Search*** (See below)
- **(Rollover for Current Search)** hovering your mouse over this text will show a description of the current query.



Full Text Search

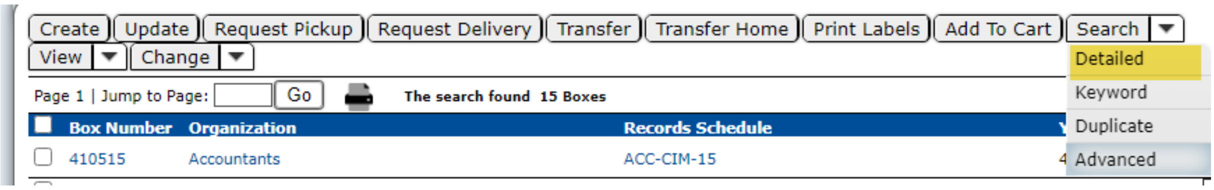
The Full Text Search is reached by clicking the 'Switch' button from the Quick Search. It allows you to enter any term which will then be used to query all text from any indexed fields for all records of the selected data type.



Note: If you are already in the Full Text Search, the ‘Switch’ button will return you to the query by field Quick Search.

Detailed Search

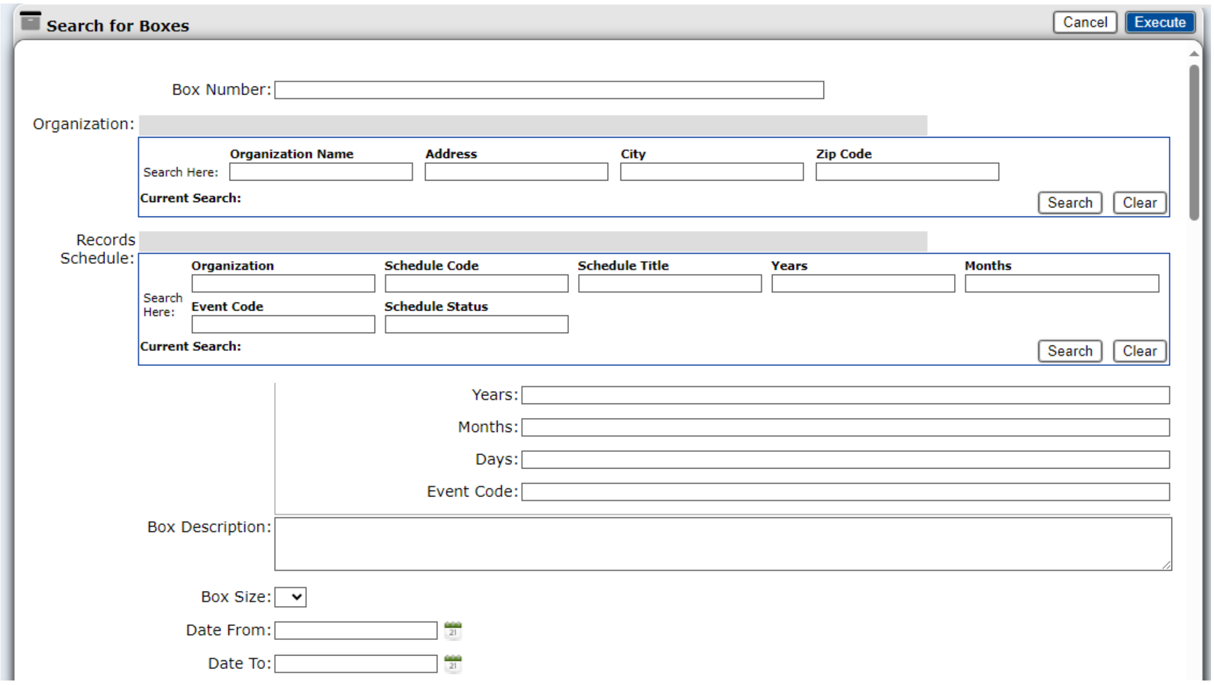
The Detail Search is accessed by clicking on the ‘Search’ button from the Action Bar and choosing ‘Detailed’



The Detailed Search displays all searchable fields and is not limited to those fields configured for the Quick Search. Additionally, Detailed Search displays all values available to search in list fields.

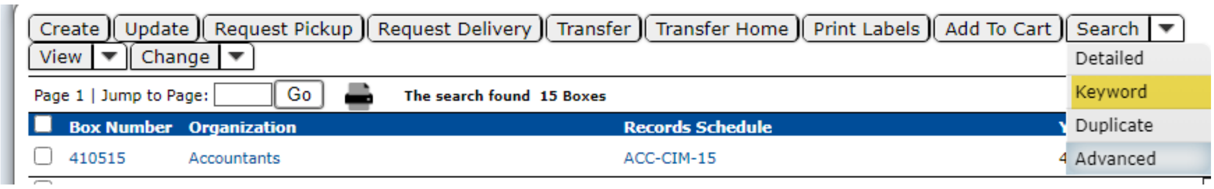
Note: This type of search will take longer to run than the Quick Search, but can help pinpoint exact data.

Once you have entered the desired criteria, click the ‘Execute’ button to run the search.



Keyword Search

The Keyword Search is found by clicking on the ‘Search’ button from the Action Bar and choosing ‘Keyword’

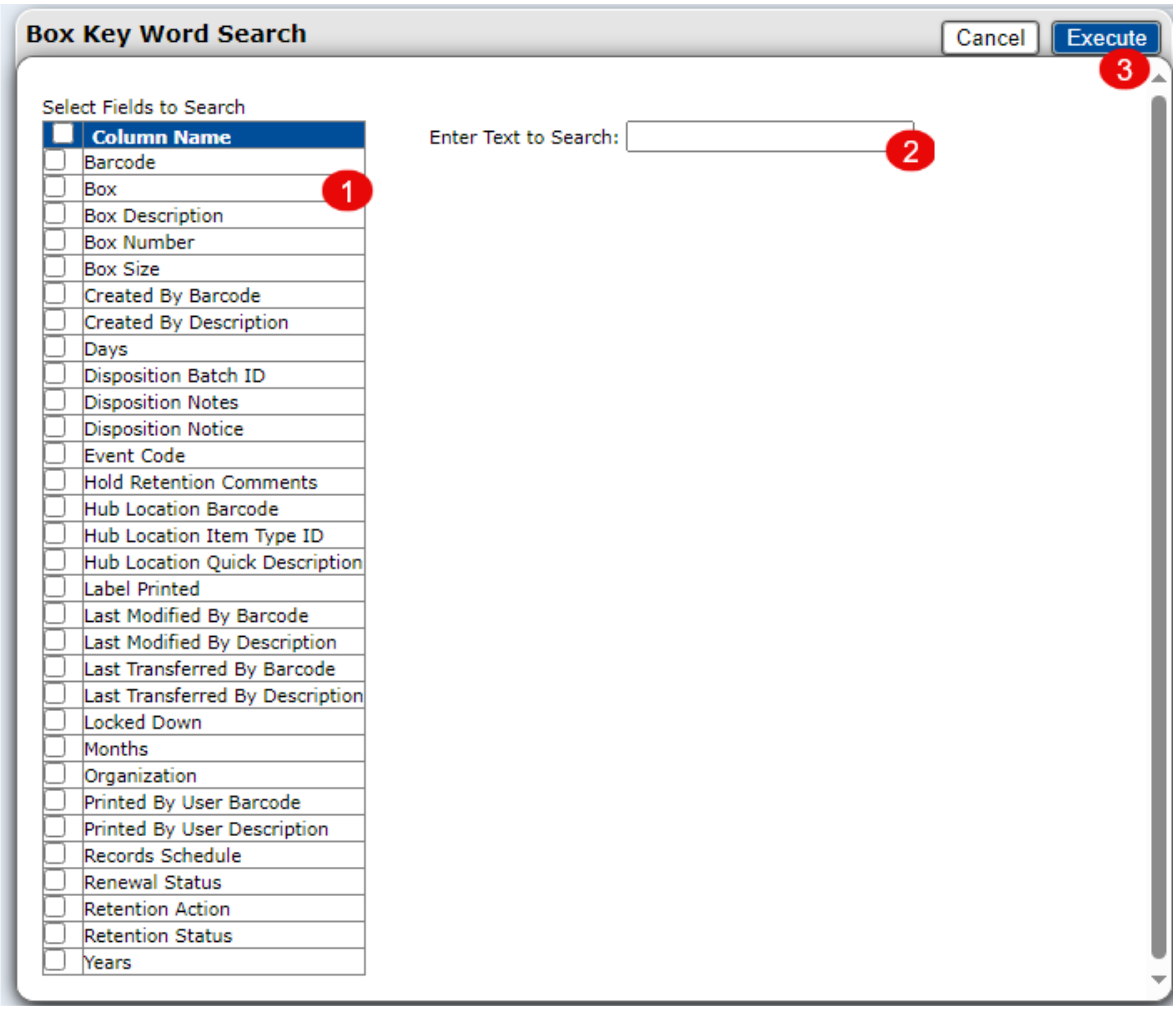


The Keyword Search is most helpful when you would like to use the same criteria over multiple fields where it can match ANY of the selected fields.

Note: This is unlike the Quick Search where if you put the same value in multiple fields, that value must match the entries in *ALL* the selected fields.

To perform a Keyword Search:

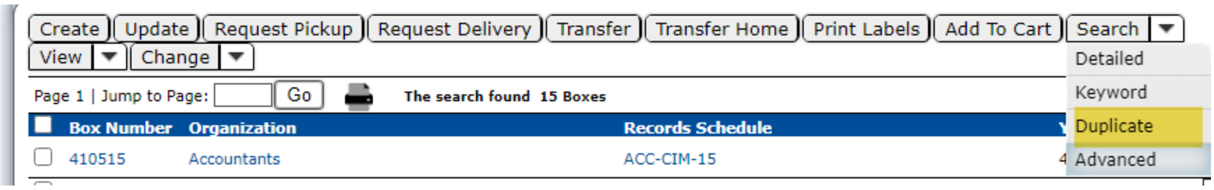
1. Choose the fields you wish to search for keywords from the ‘Select Fields to Search’ column.
2. Enter the term in the ‘Enter text to Search’ box.
3. Click the ‘Execute’ button.



Once run, you will be returned to the home page with the results of the keyword query. You can use your mouse to hover over the 'Rollover for Current Search' link to see the criteria being applied to the current list.

Duplicate Search

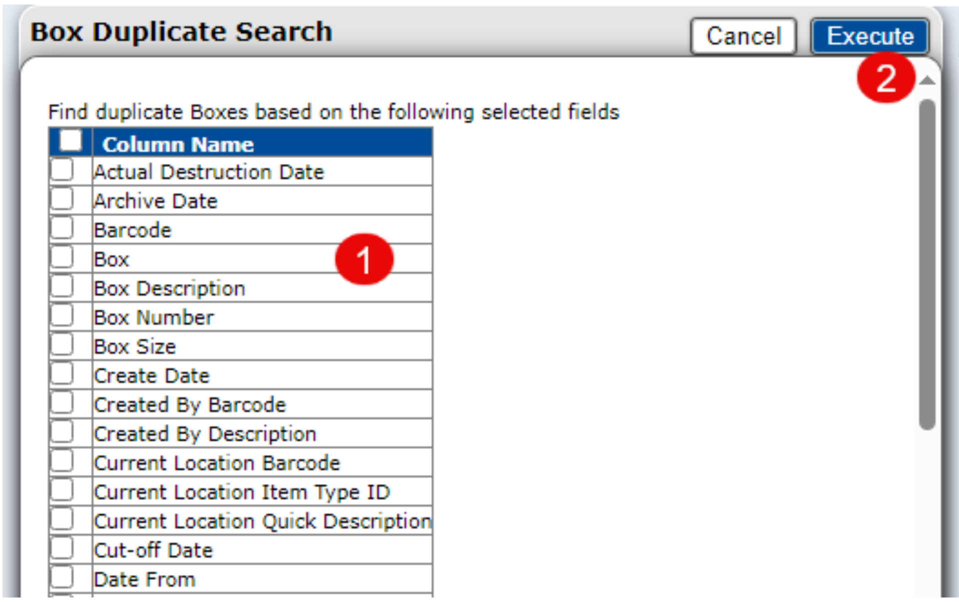
The Duplicate Search is accessed by clicking on the 'Search' button from the Action Bar and choosing 'Duplicate'



The Duplicate Search is used to find items with the same values in a selected field or fields.

To run a Duplicate Search,

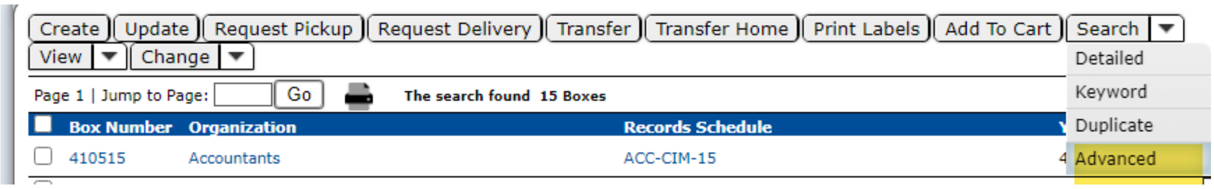
1. Select the fields which need to match to be declared a duplicate
2. Click 'Execute' to run the Duplicate Search



Once run, you will be returned to the home page with the results of the Duplicate Search query. You can use your mouse to hover over the 'Rollover for Current Search' link to see the criteria being applied to the current list.

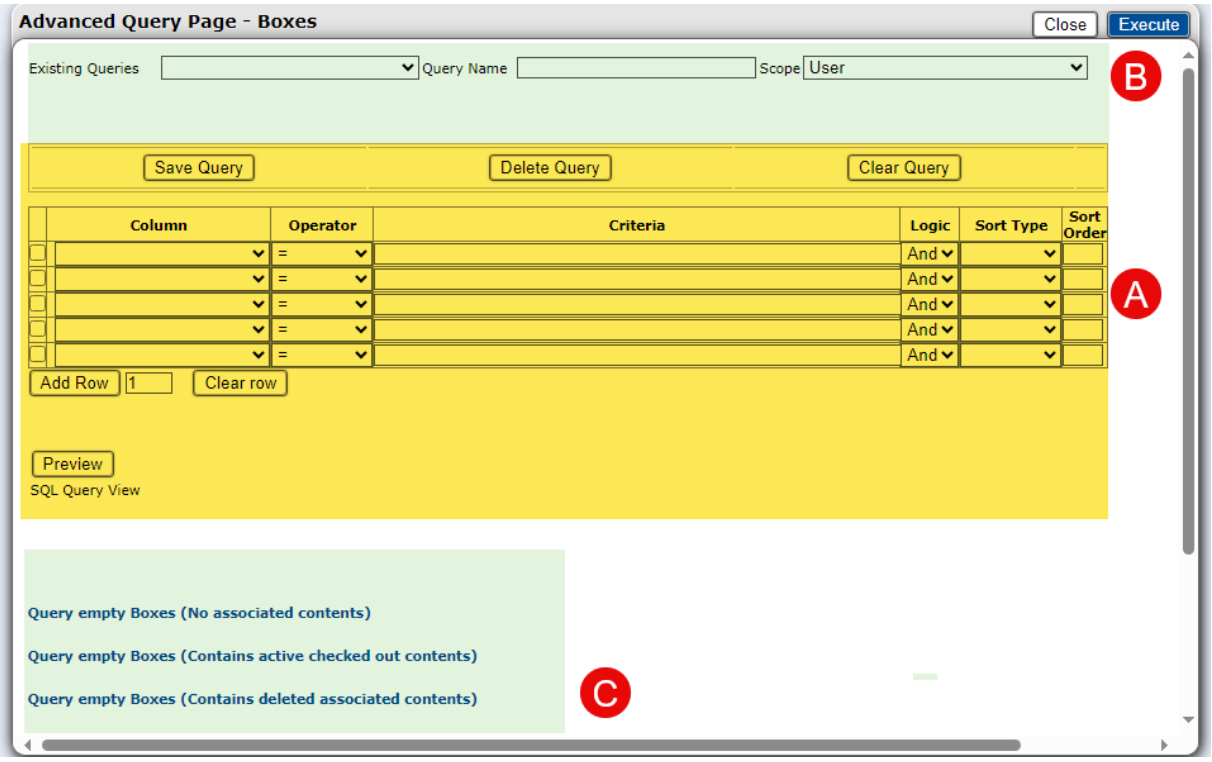
Advanced Search

The Advanced Search is opened by clicking on the 'Search' button from the Action Bar and choosing 'Advanced'



Sometimes you need to use complex criteria to find exactly the data you are seeking. The Advanced Search not only allows you to use intricate logic, but it also gives you the option to save these complex searches for future use. It is the most comprehensive search that is offered in Gimmal Physical.

Note: The advanced query is best run by users with knowledge of the SQL database language.



- Section A is where you formulate your search, featuring the Query Grid
- Section B is where you can save your query, or access an existing one
- Section C is where you can query for a variety of empty boxes

Fields, Buttons, Columns and Links

- **Existing Querie**s is a drop-down list of saved queries. Selecting a query from the list will populate the query grid with the preconfigured query options.
- **Query Name** is where you enter the name of a new query to be saved
- **Scope** is where you can limit the visibility of the new query to be visible to:
  - <u>User</u>: Only the logged-in user
  - <u>System</u>: Every user who has query rights
  - <u>Administrators</u>: Users defined in an Administrator role
- **'Save Query' button** will save the existing query. Please enter the Query Name before clicking this button or an error notification will be shown.

- **'Delete Query' button** will remove an existing query from the list. You must first select an existing query before it can be deleted.
- **‘Clear Query’ button** will clear all the criteria from the query grid. To clear criteria from one or more rows, use the ‘Clear Row’ button instead.
- **Criteria Fields:**
  - <u>Column</u> is a drop-down box that lists the fields available for this query from the chosen tab
  - <u>Operator</u> is a drop-down box which lists the available operators for the chosen field
  - <u>Criteria</u> is a text field to enter the conditions that the selected field must match to return as a result
  - <u>Logic</u> is a drop-down box with operators that can be used to join multiple rows of criteria
  - <u>Sort Type</u> lists the choice between None (blank), Ascending, or Descending to help order the results
  - <u>Sort Order</u> is used in conjunction with Sort Type for deciding the order multiple fields will be sorted
- **‘Add Row’ button** adds another row to allow more room for criteria.
- **‘Clear Row’ button** removes the criteria from the selected row (as opposed to ‘Clear Query’ which removes the criteria from all rows)
- **Preview** shows the count of matching records without returning to the home page. It also will show the SQL syntax used for this query.
- **Query empty [Items]** are three links that are used to bring up a list of three different types of empty containers. These options will be titled by the type of tab you are querying, e.g. Query empty Boxes.
- **‘Close’ button** returns to the home page grid without running the query. No criteria are saved.
- **'Execute button** runs the query and returns to the home page with the query applied. Criteria are not saved, but the *Rollover for Current Search* link will show the current query.

Saving your Advanced Query

Note: Make sure you save your query before you click the ‘Close’ or ‘Execute’ button.

1. Enter the Criteria
2. Use the ‘Preview’ button to verify the results and query are as expected
3. Enter the name of the query in the ‘Query Name’ text box
4. Click ‘Save Query’

Running an Existing Query

1. Select the query you wish to run from the list of ‘Existing Queries’
2. Make any needed changes:
   Note: If you wish to save your changes, do so before clicking ‘Execute’ or your changes will be lost.
3. Use the ‘Preview’ button to verify the results and query are as expected
4. Click the 'Execute button to return to the home page grid with the query applied

Searching for Empty Items

Any item that is a container (e.g. Boxes, Shelves) can be searched to find instances where they are empty. There are three queries (C) to cover the three most common scenarios:

- **Query empty [Items] (No associated content)** will have the resulting grid show all container items that have no associated contents at all. Any items previously inside the listed containers will have been unassociated or expunged. Alternately, these containers could have been created as a new item that never had associated content added (e.g. a new box without any files ever added). None of these containers will have actively checked out content, nor is there any 'deleted' content associated with the container.
- **Query empty [Items] (Contains active checked out contents)** will have the resulting grid show all container items where there are no contents that have the container as a current location (i.e., it is empty), but which have active associated child contents that are checked out (e.g., files checked-out of a given box). This means an empty container will appear in this query if it currently has no items in it, but which:
  - Has associated active content that is checked out (home ≠ current)
    Note: using boxes and files as examples:
    - If a box has an active file checked out as well as an associated deleted file, it **will** show in this list
    - If the box only has deleted associated files, it will **not** show in this list.
- **Query empty [Items] (Contains deleted associated contents)** will have the resulting grid show all container items which would be considered empty except all associated content has been deleted, but not expunged. This means an empty container will appear if it has no items, but which:
  - Deleted contents (e.g. files) associated with it (home = current)
  - Deleted contents (e.g. files) that are checked out (home ≠ current)
  - Note: using boxes and files as examples:
    - If a box has an active file checked out as well as an associated deleted file,
      it will not show in this list
    - If the box only has active, checked-out associated files, it will not show in this list.

Global Search

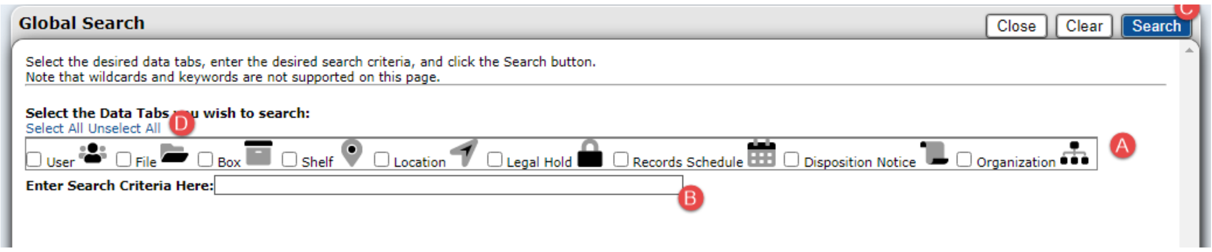
The Global Search provides this functionality to search across multiple item types simultaneously.

Because a Global Search is a resource intensive process and places a significant load on the server, it should be used only when it is not possible to perform the search on any of the other Gimmal Physical search types.

To perform a Global Search:

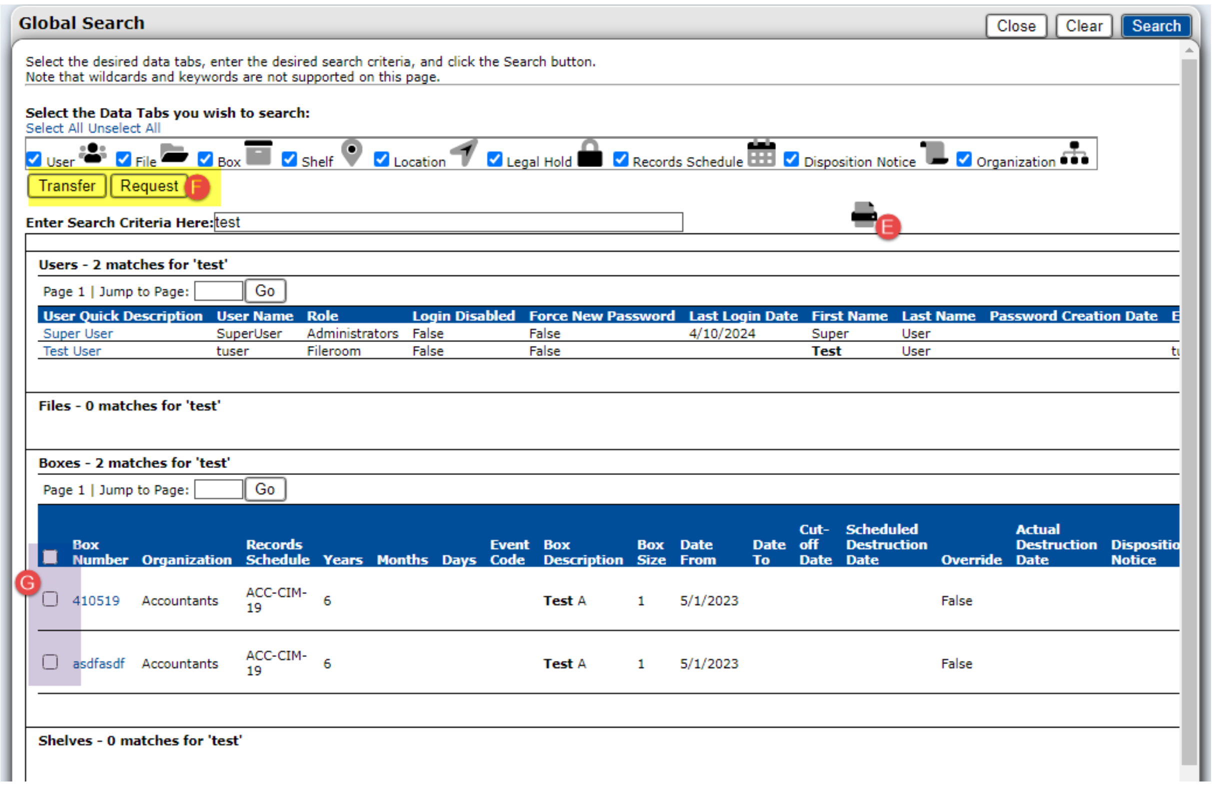
1. Click the 'Admin' link on the Gimmal Physical Navigation menus.
2. Choose 'Global Search' under the Data section of the 'Administration' page. This opens the 'Global Search' page.

3. On the Global Search page, select the item types you would like to search using the checkboxes located at the top of the page. (A). You can also use the 'Select All' and 'Unselect All' links (D) to select or deselect the tab choices.
4. Enter the desired word or phrase (with or without wildcards) in the criteria text box. (B)
5. Click the 'Search' button or press the enter key to execute your search. (C)



The results will be displayed in the grid on the Global Search page, sectioned by type. A 'Print' button (E) will be enabled allowing you to create a report of the data presented on this page.

If an action can be performed on the specific records, there will be action buttons (e.g. Transfer, Request) at the top of the screen (E) with selection checkboxes (G) next to the records that are available for the actions. Select the desired records and click on the available Action Button to apply the action to the selected records.



Search Syntax

There are several syntax options to assist in the creation of a search.

Simple Search

The easiest way to search in Gimmal Physical is to enter into the search text box an example of the term you would like to see in the results. For example, to find all items with a last name of '*bennet*', simply enter 'bennet' (without the quotes) in a Last Name field.

Search with Wildcards

Gimmal Physical supports wildcard searching using the percent sign (%) as a wildcard. For example, to find all items with a last name that starts with the letters '*ben*', simply enter '*ben%*' (without the quotes) in the last name field. To find a last name that contains the letters '*ben*', enter ''*%ben%*' (without the quotes. That will return *bennett*, *toben,* and *vanbenty*.

- Note – Your Gimmal Physical system may be configured to automatically add a trailing wildcard to any searches. In that case, do not add any wildcards to the search.

Search with Operators

It is also possible to search for multiple values in a field using search operators For example, to find all items with the last name 'bennet' or 'parker', simply enter the text '*bennet or parker*' (without the quotes) in the last name field. In this case, the '*or*' operator is used to tell Gimmal Physical to search the last name field for records with 'bennet' or 'parker'.

<u>**Available Operators**</u>

- ***or*** – **Any terms listed -** for example '*bennet or parker*' (without the quotes) will return would find all items with either 'bennet' **or** 'parker' as a value for the field.
- ***and*** – **Every term that is listed** - for example 'b% and '%t. This would find all items where a field starts with 'b' **and** ends with 't'.
- **> Greater Than a** - for example,> 1/1/2000. This would find all items where a field is **greater than** January 1, 2000. This is often used for date and numeric fields.
- **>= Greater Than or Equal** – for example >= 1/1/2000. This would find all items where a field is **greater than or equal to** January 1, 2000.
- **< Less Than** - for example < 1/1/2000. This would find all items where a field is **less than** January 1, 2000.
- **<= Less Than or Equal to a**– for example <= 1/1/2000. This would find all items where a field is **less than or equal to** January 1, 2000.
- ***<> Is Not Equal To*** will find everything except the listed value – for example <> 'bennet'. This would find all items where a field is **not equal to** 'bennet'.
- ***isnull*** – This would find all items where a field **has a null value**.
- ***isnotnull*** – This would find all items where a field **is not null**.

Search With Reserved Words

All date fields in Gimmal Physical may also be searched using the reserved words 'Yesterday', 'Today', or 'Tomorrow'.

Gimmal Physical also offers a Search and Replace functionality which allows users to replace specified text in chosen fields. Please see Search and Replace (see page 418) for more details.

4.6.1.4.1.9 (Legacy Help) Records Officer User Guide

Administrators have the option to create a role specifically for Records Officers which may also be called a 'File Room User'. This role generally performs more advanced tasks than a general user, but not quite as many as an administrator. Directions for the common tasks encountered by this type of user can be found below.

Contents

Finding Items

1. Click on the desired Tab.
2. Choose the field you wish to search from the Quick Search.
3. Enter appropriate search criteria in the chosen search field in Quick Search.
4. Click on the Search button.
5. Desired results will be returned in the grid format.

Transferring Items

1. Click on the desired Tab.
2. Click on the check box next to the item(s) you wish to transfer.
3. Click on the Transfer Action button.
4. Click on the desired destination in the Recent Transfer Destinations grid or specify the desired destination on the resulting Transfer page.
5. Click on the Transfer button on the Transfer page.

Creating Items

1. Click on the desired Tab.
2. Click on the Create Action button.
3. Enter the desired information and/or choose desired drop-down values.
4. Click on the Save & New button to continue creating records, click on the Save & View button to return to the View page after record creation or click on the Save & Close button to return to the Home Page grid after record creation.

Updating Items

1. Click on the desired Tab.
2. Click on the check box next to the record you wish to update.
3. Click on the Update Action button.
4. Make desired changes on the resulting Update screen.
5. Click on the Update button on the Update screen.

Deleting Items

1. Click on the desired Tab.
2. Click on the check box next to the item you wish to delete.
3. Click on the delete button.
4. Click ok on the resulting message confirming the deletion of this record.

Printing Labels

1. Click on the desired Tab.
2. Click on the check box next to the Item(s) you wish to print labels for.
3. Click on the Labels button.
4. Click on the Send to Queue button to send the items to the label queue or click on the Print button to print labels immediately.

Printing Queued Labels

1. Click on the Label Queues top level menu link.
2. Click on the label queue you wish to print labels for.

3. Click on the check box next to the item(s) you wish to print labels for.
4. Click on the Print Selected button to print the selected items to the label queue or click on the Print All button to print all the labels in the label queue.

4.6.1.4.2 (Legacy Help) Advanced Functionality

This section describes some advanced features of Gimmal Physical. Use the tree view to the left to navigate to the different topics or select from the list below.

For an interactive tutorial on Disposition, please click here[101].

4.6.1.4.2.1 (Legacy Help) Retention Schedules

Gimmal Physical supports the creation and management of multiple retention schedules (also called record schedules) which can then be associated to different items (e.g. boxes) to facilitate efficient disposition.

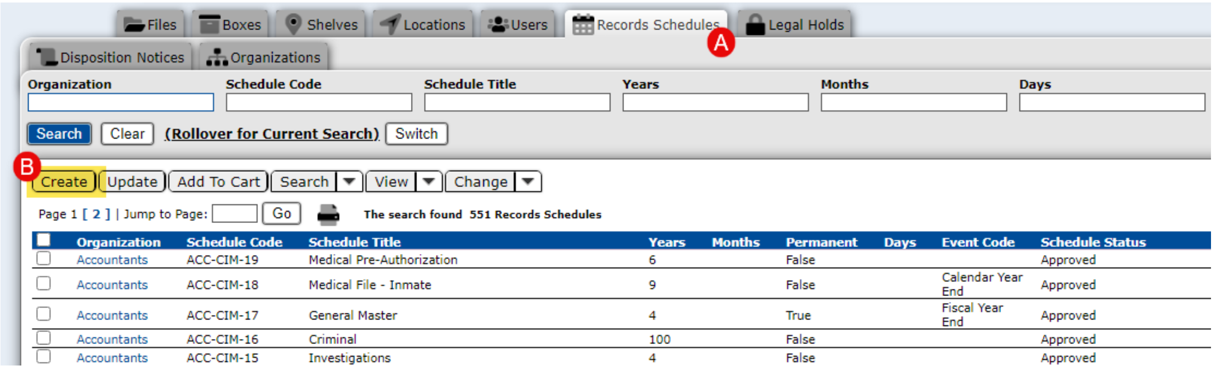
Retention Schedules are created via the appropriate data tab. These schedules can than be assigned to specific items via an Update or Bulk Update in the user interface, or via an automated or manual import of data.

Creating a Retention Schedule

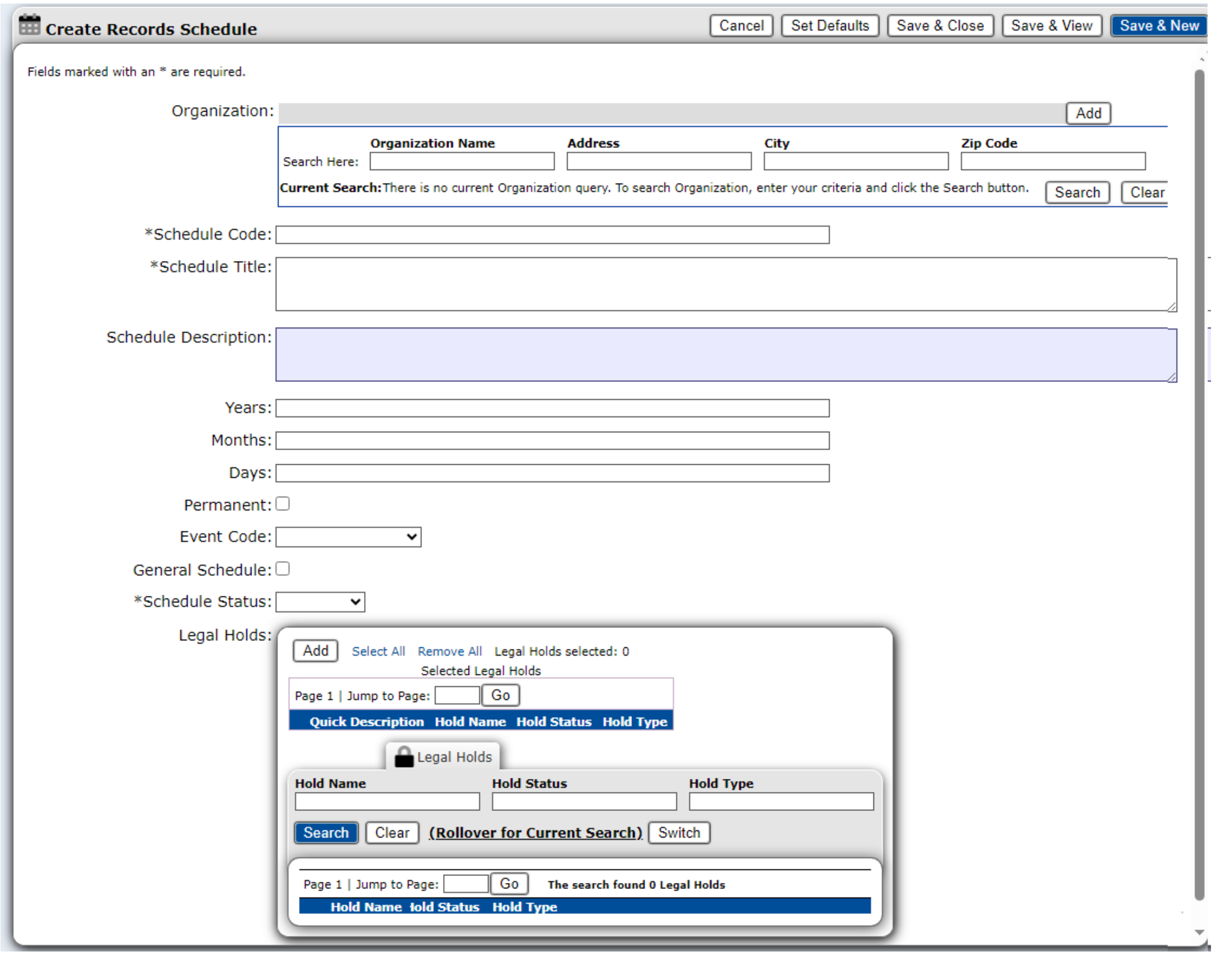
101. https://gimmal.navattic.com/sa903wg

To create a new Retention Schedule in Gimmal Physical, first click on the Retention Schedule item type tab (A) and then click on the 'Create' Action Button (B).

Note: In this example, the application has been configured to call this tab 'Records Schedule'.



The Create Record Schedule is opened with fields defining the retention schedule.



There are a number of useful buttons found on the top of the form.

- **Cancel** closes the form with out saving any changes.
- **Set Defaults** saves the currently entered values as defaults for any new record of the same type.
- **Save & Close** will save all fields and close the form, returning to the home page.

- **Save & View** will save all fields and go to the View page for the item.
- **Save & New** will save all fields for this item and remain on the page to create a new item.

The fields which are shown reflect the specific configuration of your organization. After entering the data to defined the schedule, save the Retention Schedule.

Note:

- The fields marked with an asterisk (*) are required.
- Similar to all item types, unlimited number of Retention Schedules may be created.

Reminder
The actual field, tab and action button names can be configured per organization and may vary in from those shown in the examples.

Updating a Records Schedule

To update an existing retention schedule:

1. Select the retention schedule you wish to update using the selection box in the first column of the screen.
2. Click the 'Update' button. The update screen will open allowing you to edit existing values if your permissions allow.

Applying a Retention Schedule

To apply a retention schedule to a record via the user interface:

1. Select the desired data item tab (e.g. Boxes).
2. Query the record in which to apply the schedule, and select 'Update. Alternately, a new record can be created.
3. Go to the Update screen of the record, search and select the appropriate retention schedule, click the radio button to apply and click Update to update the record.

4.6.1.4.2.2 (Legacy Help) Scheduled Disposition Guide

This guide describes the Scheduled Disposition process in Gimmal Physical For this process to work correctly, Retention and Disposition features need to be enabled as part of the configuration when Gimmal Physical is enabled.

This guide focuses on the process for deleting records associated with Records Schedules with a Disposition Action of '**Destroy**'. Records associated with a Records Schedule with Disposition Action of '**Permanent**' will never enter into a Disposition Batch.

- To prevent Records associated with a Records Schedule with Disposition Action of '**Transfer**' from entering the disposition process, the Schedule itself must be placed on Legal Hold. This will prevent the associated records from entering the disposition process.

- This document refers to Gimmal Physical version 3.15 and above only. For questions on earlier versions, please contact support at support@gimmal.com[102].

Explanation of Dates

The Scheduled Disposition process. uses several dates that are associated with physical items:

Date From	Represents the oldest date of the contents of the physical item.
Date To	Represents the most current date (or newest) date of the contents of the physical item.
Cut-off Date	Depending upon the retention schedule, this date will be automatically calculated by Gimmal Physical for a time-based schedule or a specific time + event-based schedule (calendar year) or it can be entered manually by the client. Note: The cut-off date is sometimes referred to as the Trigger Date, or Event Date.
Scheduled Destruction Date	The scheduled destruction date is automatically calculated if a retention schedule is selected, and certain conditions are met. Criteria used to calculate the scheduled destruction date are listed in 'Scheduled Destruction Date Calculation'
Actual Destruction Date	The actual date the physical item was disposed based on the final steps of the disposition process.

Scheduled Destruction Date Calculation

The automated calculation for the scheduled destruction date is determined by the retention schedule (see rules below) unless it meets the following conditions:

1. If **Override** is selected, no automatic calculations are performed by Gimmal Physical for the Scheduled Destruction Date. In this situation, the Scheduled Destruction Date must be manually entered.
    a. Note: The Override value does not determine the 'Cut-Off Date'.
2. If the item is attached to a Permanent Records Schedule, the Scheduled Destruction Date will never be populated.

102. mailto:support@gimmal.com

3. Container Calculations: The method of calculation is dependent on the Setting 'Use Box data to determine Scheduled Destruction Date' as listed in Admin | Application Settings. This value is set at the time of application configuration and cannot be changed.
    a. If set to 'No', only Files will be used as the primary date for the calculation of the Box Scheduled Destruction Date. Absent the above conditions, when an item is a container (e.g., a Box) and has content items with dates (e.g., a File), the dates for the contents (the Files) act as the master to determine the dates of the source container (the Box).
        i. The Scheduled Destruction Dates of the container will be the maximum of the Scheduled Destruction Date of the contents unless otherwise noted below:
            1. If the deletion or transfer of the content items empties the container, the Scheduled Destruction Date will be set to null.
            2. If any content item has a null Scheduled Destruction Date, the container will also have a null destruction date.
        ii. Regardless of whether Scheduled Destruction Dates for the content items display a value, other dates will be set as follows to ensure search fidelity:
            1. Date From = Minimum 'Date From' of the content items in the container
            2. Date To = Maximum 'Date To' of the content items in the container
            3. Cut-off Date = Maximum 'Cut-off Date' of the content items in the container
        iii. Several actions will force the recalculation of a source container. This includes:
            1. The **creation** of a new content item within a container
            2. Content items **deleted** from a container
            3. Content items are **transferred** into or out of a container.
            Note: If a content item is transferred, the container for both the source and the destination will be recalculated to conform to the remaining contents in the container.
    b. If set to 'Yes', then the contents of a Box (e.g. Files) and the Box itself are used in calculations of the Scheduled Destruction Date of the Box. Whichever the greater of the Scheduled Destruction Date will be used for disposition. Absent Scheduled Destruction Dates, the calculations will be based on the greater of the Files or Boxes Date To fields.
        i. This option allows for Files without Scheduled Destruction Date to be included without affecting the Box Scheduled Destruction Date.
        ii. The greater of a File or a Box Scheduled Destruction Date or Date To will be used.
        iii. Users can enter a greater Scheduled Destruction Date or Date To on the Box than the Files entered.
        iv. This option is the default. It is very helpful for applications while file contents may not be entered into the system.

Retention Schedules & Dates

1. <u>Time Based Retention Schedule</u> is a schedule to store data for a specified interval. When a time-based retention schedule is associated with a physical item and the Date From and Date To are entered, the Gimmal Physical application automatically calculates a Cut-off Date. The

Scheduled Destruction Date is then calculated based on the listed Year, Month, and Day values of the retention schedule.

2. Event+ Time Based Retention Schedule is a schedule to store data for a specified interval after a specified event has occurred. When this type of schedule is associated with a physical item* and the Date From and Date To are entered, the user must enter an Event (aka Trigger or Cut-off) Date. The Scheduled Destruction Date is then calculated based on the listed timespan (the Year, Month, and Day values) of the retention schedule.
   *There is an exception to this calculation for known events whose dates are consistently known (e.g. Fiscal Year-End or Calendar Year-End). In this case, the List Value month/day is used to calculate the cut-off date. With that date, the Scheduled Destruction Date is then calculated.
   Note: For this known events date calculation to work properly, the Event Code list value for options like Fiscal Year-End must be configured for the correct Month/Day. See the ‘List Values’ section below.
3. Event Based Retention Schedule is a rare schedule that is identical to the Event+Time above, however, the destruction will occur immediately after the event is triggered. The timespan, in essence, is 0.

Gimmal Physical Application Disposition Process

The Disposition Process within the Gimmal Physical application consists of three distinct stages: Identification, Aggregation, and Disposition.

Each one of these stages comes with its own set of reports and a specific set of requirements to be met to proceed through the disposition process.

- The **Identification Stage** comes with the disposition approval reports. There is an Approval Report for each functional unit, department, or organization involved.
- The **Aggregation Stage** comes with the Disposition Picklist Report. There is a Picklist Report for each facility’s housing records.
- The **Disposition Stage** comes with the Certificates of Destruction for each functional unit, department, or organization involved.

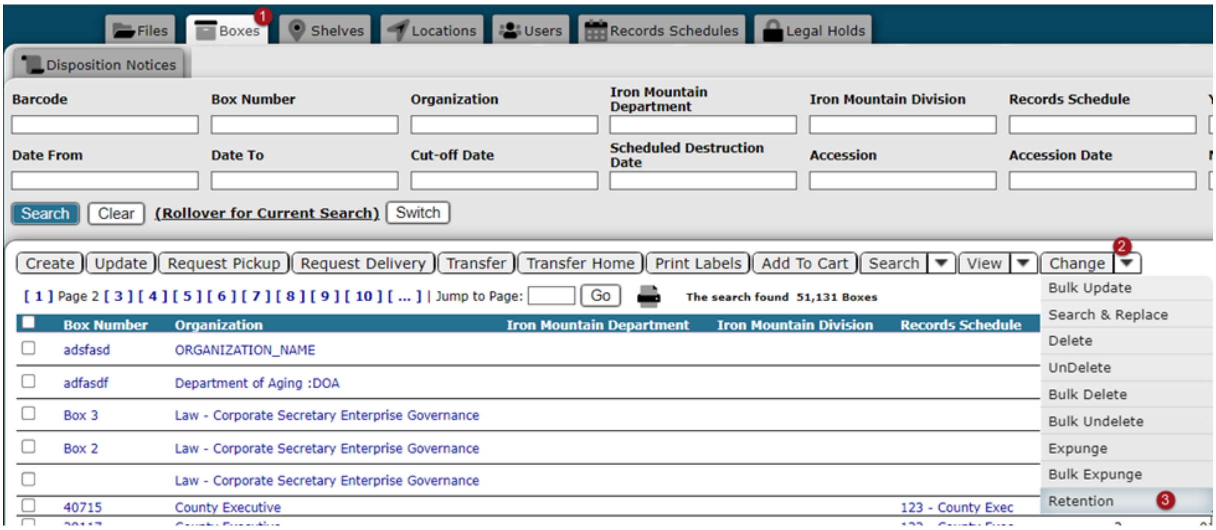
Based on conversations during the application configuration, disposition can be run at the container (e.g. box) or contents (e.g. file) level.

Identification Stage

To be included in a disposition batch, an item cannot be on a Legal Hold or already deleted. The specific items must then meet the criteria of the specified Target Date and have a related Organization, Location, or both as chosen by the filters. If the criteria is only a specified Target Date (i.e. no filters are used), this identification will be run across all Organizations and Locations.

In the example below, Boxes will be used.

Ready to Proceed: *Boxes Tab > Change > Retention*



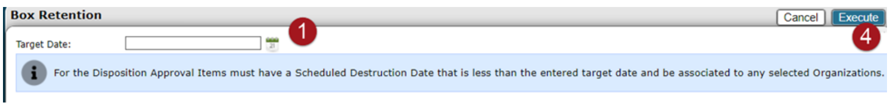
1. Proceed to the Boxes Tab.
2. Select the Retention button to begin the disposition process.

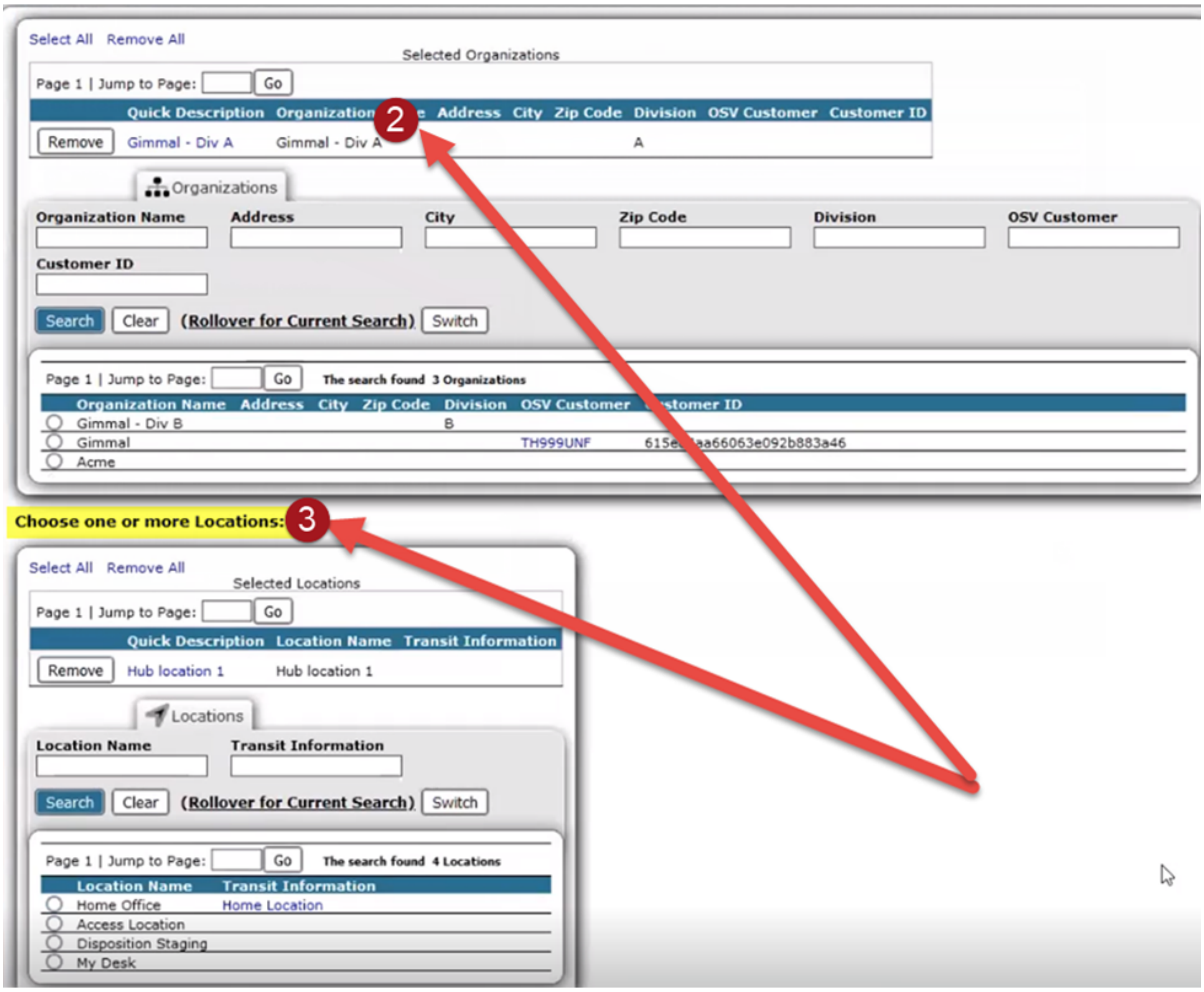
The Box Retention view will open. At this point, batches may or may not have been run. A batch is simply a grouping of the items that meet this disposition criteria. Once a batch has been run, a grid will appear to manage the previously run batches or in process batches.

There is a helpful information bubble up at the top of the page that will highlight the step being activated within the process.

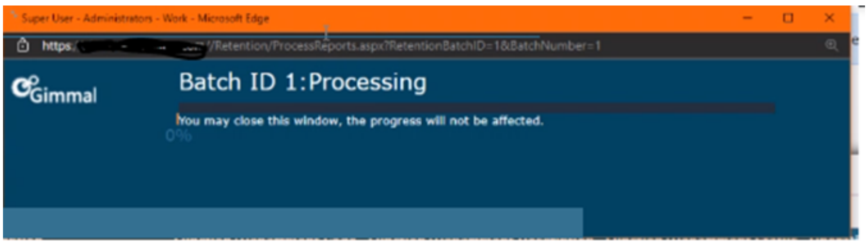
To begin disposition:

1. Enter the Target Date by typing directly or using the calendar control.
2. Choose to filter by one or more Organizations (optional).
3. Choose to filter by one or more Locations (optional).
   Please note: only Hub locations are available as a filter option for disposition.
4. Select Execute, then click ‘OK’ on the subsequent verification page

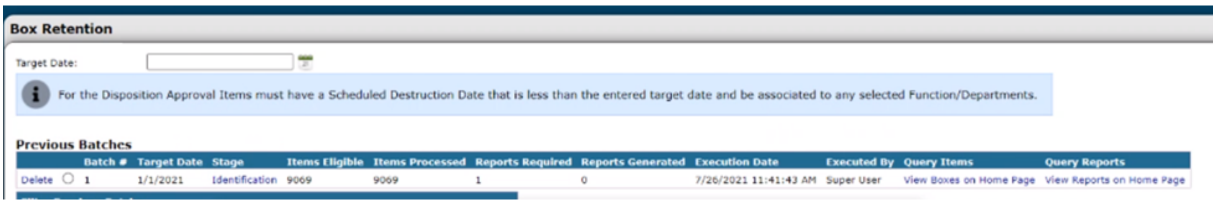




A pop-up will appear to let you know the process is being run.



Once the batch processing is complete, the Box Retention page will be updated with details of the new batch. A new, automated, batch number is assigned for all boxes which meet the disposition criteria.



Note: Boxes can be removed from the batch if they should not be destroyed or need further review. To do so, use the linked queries to show the list of boxes in the batch. Use the update options (single or in bulk) to remove the batch number for the specified boxes.

To proceed to approval, the report can be queried for review from the Query Reports.

To view Query Reports, go to *Boxes* > *Change* > *Retention*.

Gimmal

Disposition Approval
Batch 1

Filter applied
to report:

Item Barcode	Description	Date Range	Scheduled Destruction Date
000001246660	00000124666002/01/2009-03/30/2009	2/1/2009 - 3/30/2009	12/31/2019
000001246605	00000124660501/03/2010-10/03/2010	1/3/2010 - 10/3/2010	12/31/2020
000001246657	00000124665701/01/2009-12/31/2010	1/1/2009 - 12/31/2010	12/31/2020
000001246654	00000124665401/01/2009-12/31/2010	1/1/2009 - 12/31/2010	12/31/2020
000001252296	00000125229601/01/2009-01/31/2009	1/1/2009 - 1/31/2009	12/31/2019
000001246659	00000124665901/01/2009-12/31/2010	1/1/2009 - 12/31/2010	12/31/2020
000001246595	00000124659510/10/2010-12/31/2010	10/10/2010 - 12/31/2010	12/31/2020
000001252493	00000125249303/01/2009-12/31/2009	3/1/2009 - 12/31/2009	12/31/2019
000001252278	00000125227801/01/2009-05/31/2009	1/1/2009 - 5/31/2009	12/31/2019

Batch numbers have been designated on each item and are ready for approval.

Approval Notes

1. Some clients require a user to access the Gimmal Physical application and approve the disposition of the boxes. They can be approved individually or a selected set via Update or Bulk Update.
2. Other clients share the reports via email or hard copy to the appropriate personnel for responses. In this case, the Gimmal Physical Administrator manually enters the approvals into the application based on the responses they receive.
3. Multiple approval levels can be added to the Gimmal Physical application, however, access to the levels cannot be separated out based on role.
    a. Proceed to *Admin* > *List Values* > *Disposition Approval* > *Add New Field* to force an order for approvals.
    b. We recommend adding a digit with a hyphen (e.g. 1-, 2-, 3)- to the value name, to maintain a logical order, otherwise the list will sort alphabetically.

The boxes that are approved can now move to the Aggregation Stage.

Helpful Tips for the Identification Stage

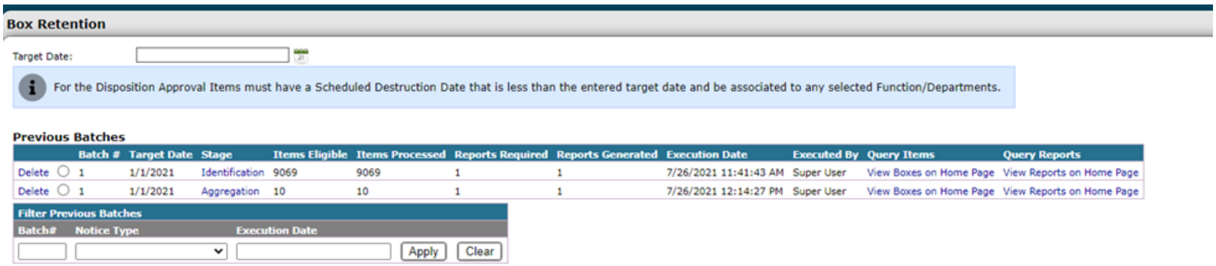
- For more control, or a smaller number of boxes to approve:
    - Eliminate boxes on Legal Hold
    - Filter by Organization, Location, or both
- If a large backlog of items exists, run batches in years and months for easier management.
- To provide a count of boxes that are ready for deletion before initiating the retention process, search the Boxes Tab based on the following criteria:
    - Not deleted (Deleted set to false),
    - Not on a legal hold (Legal Hold set to false)

    - Enter a particular scheduled date with the appropriate comparison operator (usually less than <).
- To see box level details, like the Disposition Notice showing the current Stage/Batch and the Disposition Approval checkbox, simply view the Box. Please note that changes to this information are recorded in history.
- If a File belongs in a Box but is checked out when the Box is destroyed through a Disposition Batch, the File is not deleted, but its Home Location is removed. The file will inherit a new Home Location based on the next Box it gets put into.

Aggregation Stage

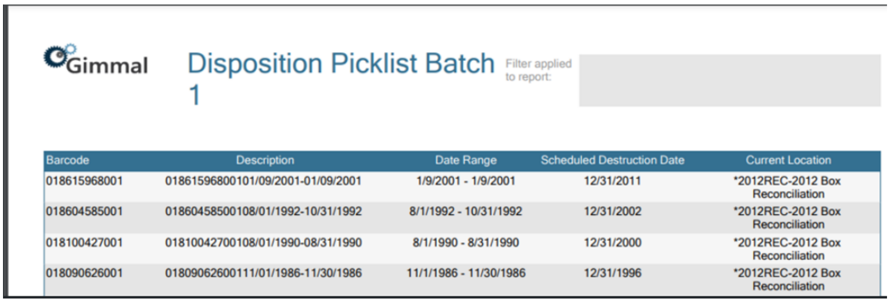
Ready to Proceed: *Boxes Tab > Change > Retention*

Select the radio button on the Identification Stage and click Execute to move to the Aggregation Stage for the selected batch.



	Batch #	Target Date	Stage	Items Eligible	Items Processed	Reports Required	Reports Generated	Execution Date	Executed By	Query Items	Query Reports
Delete	1	1/1/2021	Identification	9069	9069	1	1	7/26/2021 11:41:43 AM	Super User	View Boxes on Home Page	View Reports on Home Page
Delete	1	1/1/2021	Aggregation	10	10	1	1	7/26/2021 12:14:27 PM	Super User	View Boxes on Home Page	View Reports on Home Page

All boxes approved for disposition should be physically moved from the shelves and set aside to a Disposition Staging Location. To facilitate this activity, the Disposition Picklist Report can be used.



Barcode	Description	Date Range	Scheduled Destruction Date	Current Location
018615968001	01861596800101/09/2001-01/09/2001	1/9/2001 - 1/9/2001	12/31/2011	*2012REC-2012 Box Reconciliation
018604585001	01860458500108/01/1992-10/31/1992	8/1/1992 - 10/31/1992	12/31/2002	*2012REC-2012 Box Reconciliation
018100427001	01810042700108/01/1990-08/31/1990	8/1/1990 - 8/31/1990	12/31/2000	*2012REC-2012 Box Reconciliation
018090626001	01809062600111/01/1986-11/30/1986	11/1/1986 - 11/30/1986	12/31/1996	*2012REC-2012 Box Reconciliation

Transfer boxes to the Disposition Staging Location within the Gimmal Physical application. This can be accomplished by a barcode scanner or by manually updating the system.

If you are using off-site storage vendor (and not using any Gimmal Off-Site Storage Connectors), you should provide this information to your off-site vendor for disposition.

Helpful Tips

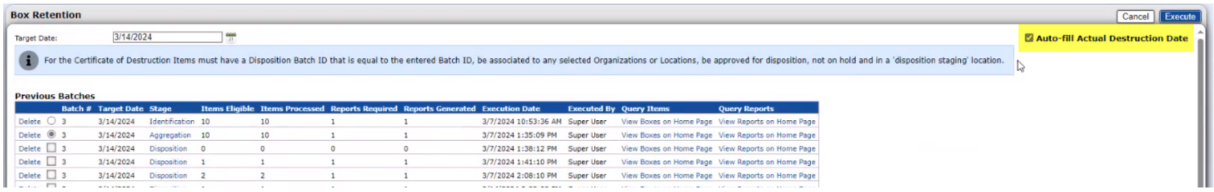
- *A barcode scanner can be used to transfer the boxes to the Disposition Staging Location. This is an opportunity to confirm that all the correct boxes have been pulled for destruction.*

- *There is a helpful information bubble up at the top of the page that will highlight the step being activated within the process.*
- *A Disposition Staging Location needs to be created within the application under Locations and the checkbox “Is Disposition Staging Location” needs to be enabled for the chosen Location(s).*

Disposition Stage

Ready to Proceed: *Boxes Tab > Change > Retention*

Select the radio button on the Aggregation Stage for the batch you wish to dispose of, then click the ‘Execute’ button to move to the Disposition Stage.



Gimmal Physical uses the settings on the ‘Auto-fill Actual Destruction Date’ option at the top right of the Retention page to manage how it Actual Destruction Date value:

When this stage is initiated, if the ‘Auto-fill Actual Destruction Date’ is:

- Enabled
  - Any items with Actual Destruction Date fields that **do not** contain a value will be stamped with the **current date** as the Actual Destruction Date.
  - Items that have valid values for Actual Destruction Date fields will **not b**e changed.
  - All approved items in the selected batch will be deleted from the system.
  - All approved items in the selected batch will be included in the Certificate of Destruction.
- Disabled
  - Only approved items with an Actual Destruction Date with a valid value (i.e. not empty) will be marked ‘Deleted’.
  - Values for Actual Destruction Date fields will **not b**e changed.
  - Other items which did not have an Actual Destruction Date:
    - Will remain in the batch
    - Will not be included in the Certificate of Destruction.
    - Can be disposed of once they have an Actual Destruction date, but each set will generate a separate Certificate of Destruction.
    - The execution date/time or item deletion date/time can be matched with the batch number and report to locate the specific Certificate of Destruction to the items run step.
    - If a completely new batch is run, the leftover items (i.e. those which do not have an Actual Destruction Date to qualify for the earlier batch) will be included with the new batch. They will need to go through the process again, including approvals.

- The default for the ‘Auto-fill Actual Destruction Date’ value can be changed on the Administrator | Application Settings page. However, the processing will follow whatever is set on this retention page.
- Depending on the volume of data being disposed of, this process can take a significant amount of time.

Once the disposition process has been completed, the Certificate of Destruction can be accessed via the ‘View Reports on Home Page’ link which accesses the Disposition Notices Tab.

- Reports are in PDF format and are time-stamped when the process is complete.
- Only items with Actual Destruction Dates are included with the Certificate of Destruction (whether manually entered or automated).
- Scheduled and actual destruction dates are shown in separate columns.

Certificate of Destruction Batch 3

Filter applied to report:

Test Org

Item Barcode	Item Description	Date Range	Scheduled	Actual
0000000209	0000000209	1/1/2021 - 1/20/2021	2/21/2022	3/15/2024
0000000210	0000000210	1/1/2021 - 1/20/2021	2/21/2022	3/15/2024
0000000211	0000000211	1/1/2021 - 1/20/2021	2/21/2022	11/22/2023
0000000213	0000000213	1/1/2021 - 1/20/2021	2/21/2022	3/15/2024
0000000214	0000000214	1/1/2021 - 1/20/2021	2/21/2022	1/1/2024
0000000216	0000000216	1/1/2021 - 1/20/2021	2/21/2022	3/15/2024

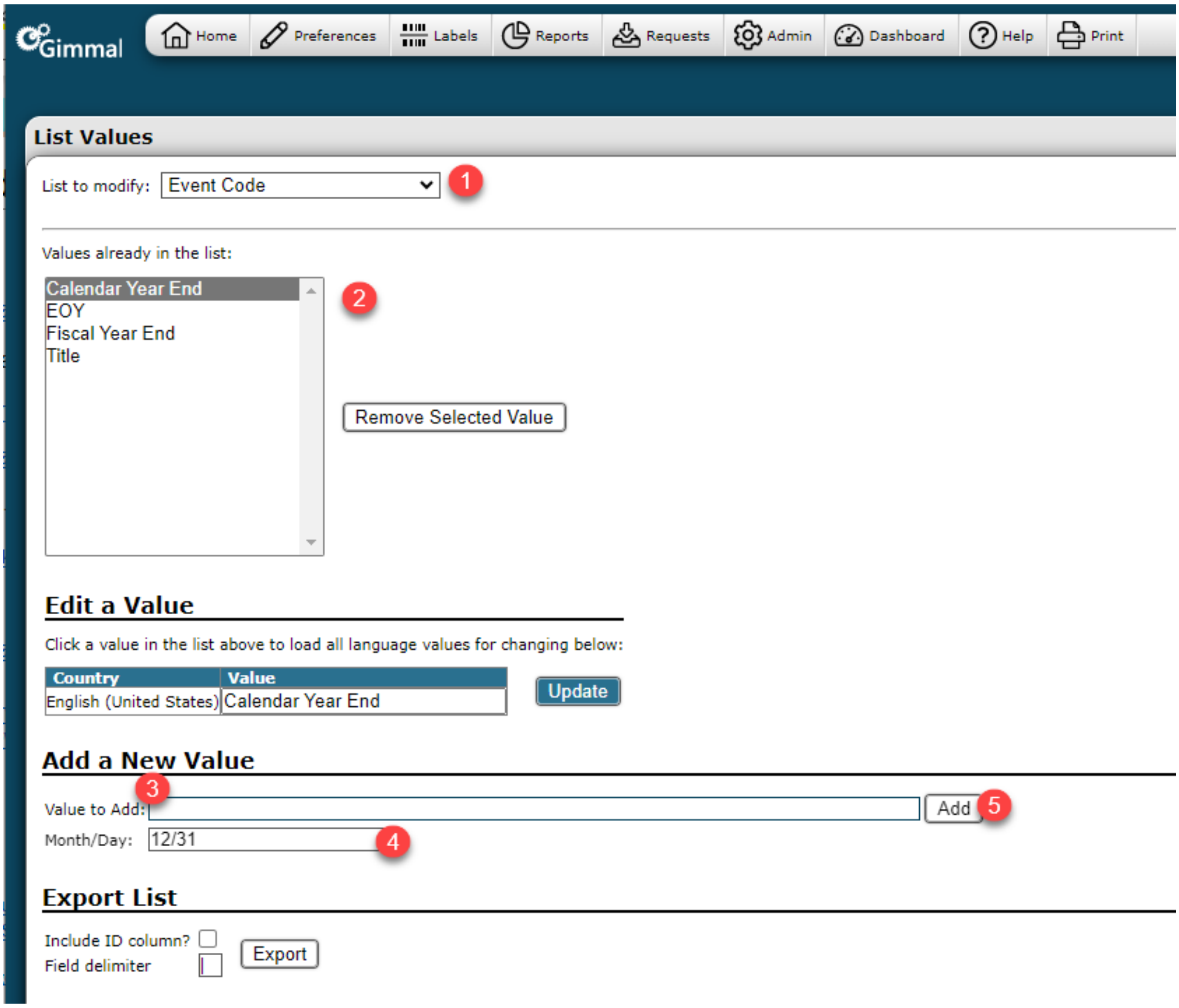
3/15/2024 8:11 AM 1 of 1

Adding List Values

Certain Event Codes require additional information which is stored as part of the list value entry. List Values are managed in *Admin > Data > List Values*.

1. To add values to the Event Code, select the appropriate ‘Event Code’ from the "List to modify" drop-down box.
2. To modify an existing value, select it from the ‘Values already in the list’ control.
3. Type the name of the value you wish to add in the 'Value to Add' text box.
4. If the Event Code value has an associated Month and Day, enter them into the Month/Day text column in a MM/DD format (where MM = the static month of the event and DD = the specific static day of the month for the event)

5. Finally, click the 'Add' button or press the enter key.



Questions

Please contact Gimmal Support at support@gimmal.com[103] with any questions.

4.6.1.4.2.3 (Legacy Help) Synonym Support

Gimmal Physical supports finding items by alternate names or descriptions. There are two aspects to supporting Synonyms - relating the items that are synonyms to one another and finding those values. To cover a variety of use cases, Gimmal offers both synonym list value controls and synonym tabs.

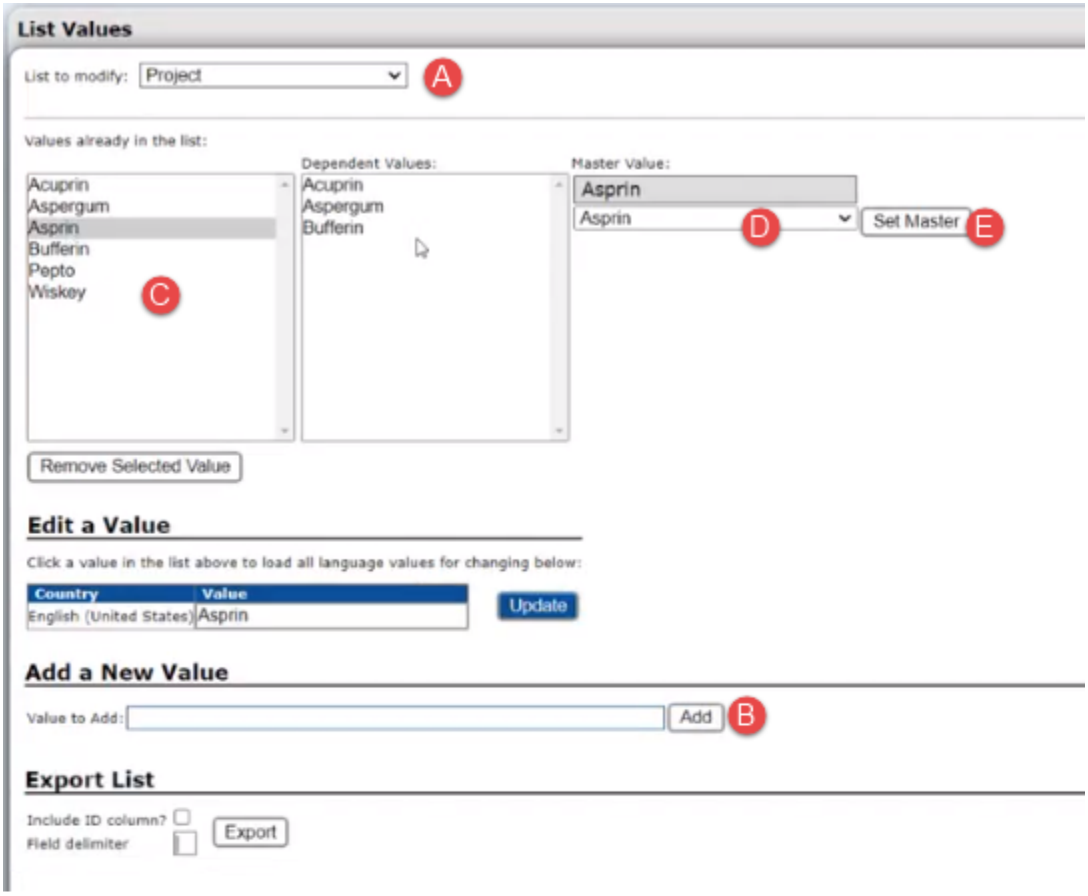
- **Synonym List** control is helpful if you wish to have related values in a single list with no extra data required.
- **Synonym Tab** is recommended if you need additional fields to help define the individual values (e.g. region)

103. mailto:support@gimmal.com

- This functionality is not available in versions below 3.15.
- Both Synonym options require advanced configuration in addition to the steps below - they cannot be enabled via the user interface alone.

Synonym List

After enabling Gimmal Physical to use Synonym List values in the advanced configuration, the Synonym List will appear as lists to modify in the Admin | List Values page. When chosen from the dropdown of 'Lists to modify', additional options are used to declare values of the list as 'dependent' on the key or 'Master' value. Any records with list values that are related to one another through the master/dependent relationship will be found and returned together as part of the same search.



Managing Synonyms

1. Select the list that was created as a Synonym List (A)
2. Add all values into the list individually using the 'Value to Add' form and clicking 'Add' B)
3. To choose the 'Master' or key value:
    a. Select a synonym from the list of values. (C)
    b. Choose the key value from the list of values, under the 'Master Value' heading. (D)

   c. Click the 'Set Master' button. (E)

4. Repeat for each dependent value.

To remove the relationship between two values:

1. Select the dependent value
2. Choose itself or another item in the list for the master value from the list of items (D)
3. Click 'Set Master' (E)

- No value can be removed from a list if it is in use in a record.
- A value is its own master if none is set for it.
- When selecting a master value from the values, its dependent values will appear in the 'Dependent Values' box.
- There can only be one Synonym list value control per tab.

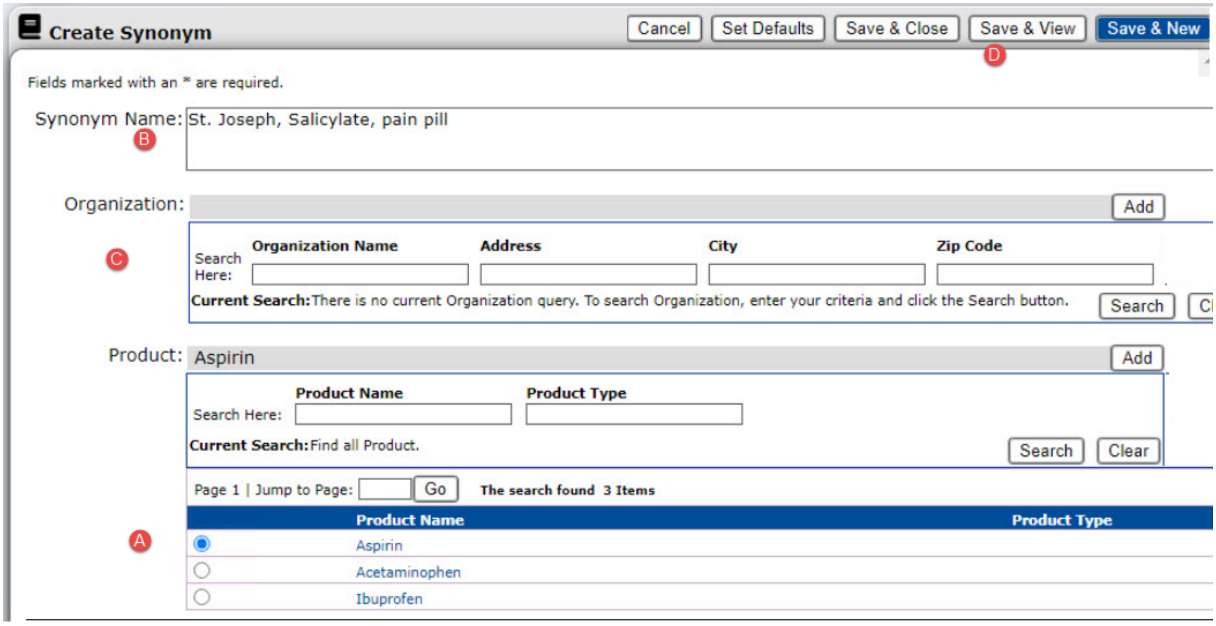
Searching for Synonyms

The values selected in the synonym list can be searched like any other list field in the search fields. The only difference is that if any of the related values are responsive to the search criteria, they all will be returned.

Synonym as a Tab

The Synonym tab appears after enabling the functionality in the advanced configuration. The fields on this tab are highly dependent on the chosen configuration, but the linked tab (Product, in the example below) will be one of the associated fields.

Creating the Synonyms

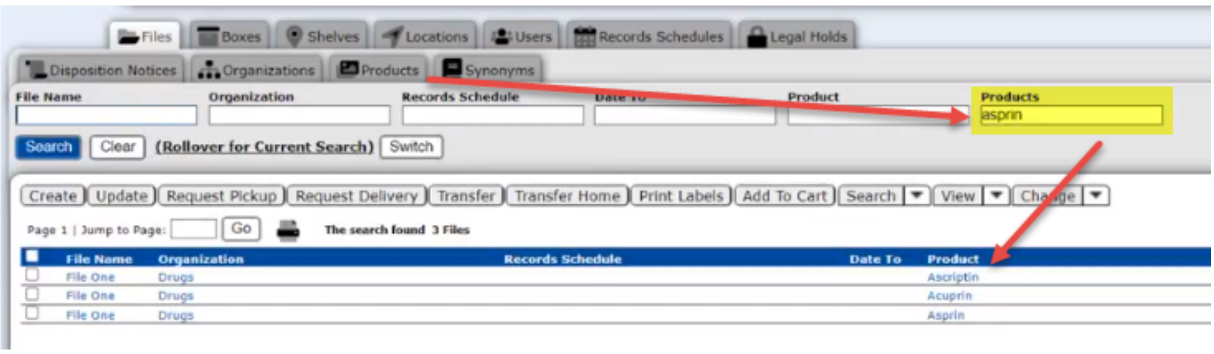


To create synonyms, the core values must first be added on the associated Tab (e.g. Product = Asprin). When creating a new set of synonyms for that product:

1. Create a new value on the Synonyms tab,
2. Choose the Product which needs the Synonyms (A)
3. Add all associated synonyms in the 'Synonym Name' field. (B)
    a. Multiple values should be separated by a comma
4. If other fields are present (e.g. Organization or Region), select the appropriate values to associate with these synonyms. (C)
5. Click one of the 'Save' options to save the product/synonym relationship. (D)

Searching for Synonyms

Any synonyms associated with the item via the Synonyms tab can be found for any item with related values. In the example below, Product is a property for the File tab. Any file record whose product is listed as one of the synonyms will be returned as part of a quick search for the Product field.



- Gimmal Physical currently supports only a single Synonym Tab related to a single item.

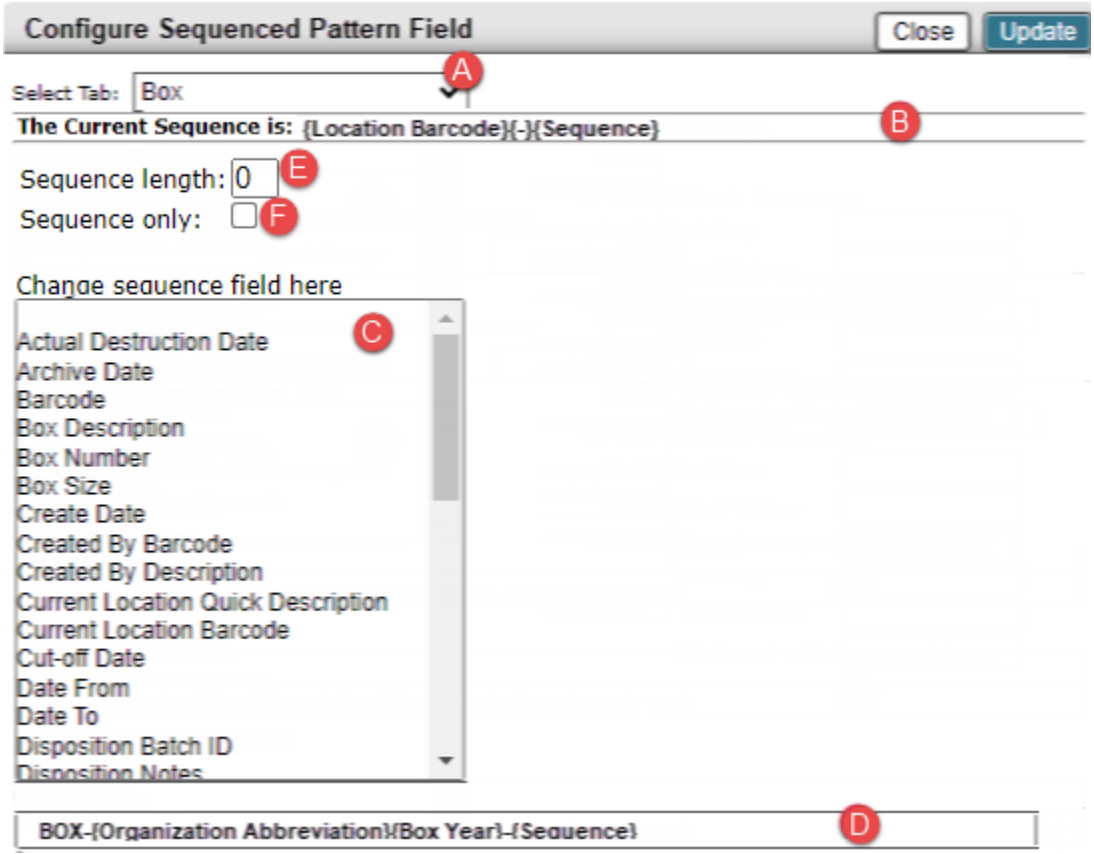
4.6.1.4.2.4 (Legacy Help) Pattern Sequencing

Gimmal Physical offers options to create field values in a new record which are based on a pattern defined by other fields in the item being created. For example, requirements may include a descriptive field that reflects the sequence number of that box for that year in that organization.

Once enabled, the configuration options for the sequence pattern field are accessible via the 'Configure Sequence Pattern' option in the Configuration section of the Administration page. Existing values from any **required** field can be used to render the pattern for the new value. Additionally, a special field called 'Sequence' is available as a numeric increment for any unique pattern created by the selected tab fields. Once set, these options are used to create the sequence field value when a tab item (e.g. box or file) is created via UI or import.

- Once set, a pattern sequence value does not change, even if the underlying values are changed. (See 'Home Location Exception ' below).
- There can be only one Pattern Sequence field per tab.
- Advanced configuration is needed to enable the Pattern Sequence tab.
- The {Sequence} token must be present to populate a value in the sequenced pattern field.

Home Location Exception
If the Home Location field is used as part of the Pattern Sequence, the underlying value ***will*** change when the home location of the item changes. Furthermore, the default [Home Location] field will not be present in the resulting pattern, and other fields ***cannot*** be used as part of the pattern.
Note: This functionality is intended to be used for Files in container home locations only (e.g. Boxes or Shelves) and has not been validated for any other use case.



To set a new pattern, or revise an existing pattern:

1. Choose the tab that contains the pattern field you wish to add or update from the 'Select Tab' dropdown field (A). This list will only contain tabs that have been configured (via advanced configurations) to have pattern sequence fields.
2. If a pattern has already been configured for the selected tab, it will appear in the Current Sequence section (B).
3. Text and fields can be entered in the 'New Pattern' box (D) to create a new pattern.
   a. Add text or characters by entering them directly into the 'New Pattern' text box. In the example above, 'BOX-' will appear on every new value created in this pattern sequence field.
   b. Additional text characters can be entered at any point in the pattern. In the example above, hyphens are used to delineate all field and sequence values.
   c. To enter a field value into the new pattern, double-click on the field in the list box (C). The field name will show up in the new pattern box with curly brackets, (e.g. *{Box Year}*) indicating the placement of that field value in the pattern for any sequence value created in a new record.
   d. To enter a placeholder for the Sequence in the pattern:
      i. Double-click the 'Sequence' option in the list box. This adds the sequence to the pattern.

ii. A field will appear for 'Sequence Length' (E). This determines the total length of the sequence value using zeros as padding. For example, a length of 6 and a sequence of 38 will result in a sequence value of 000038.

e. To include the numeric sequence only (without associated field values), choose the checkbox entitled 'Sequence Only' (F). The numeric value will be based on the selected fields, but these field values will not be shown as part of the final value field.

4. Click the 'Update' button to save the new pattern. All new records for this tab from this point forward will use the new pattern.

- When updating an existing pattern, only day forward records will reflect the new pattern.

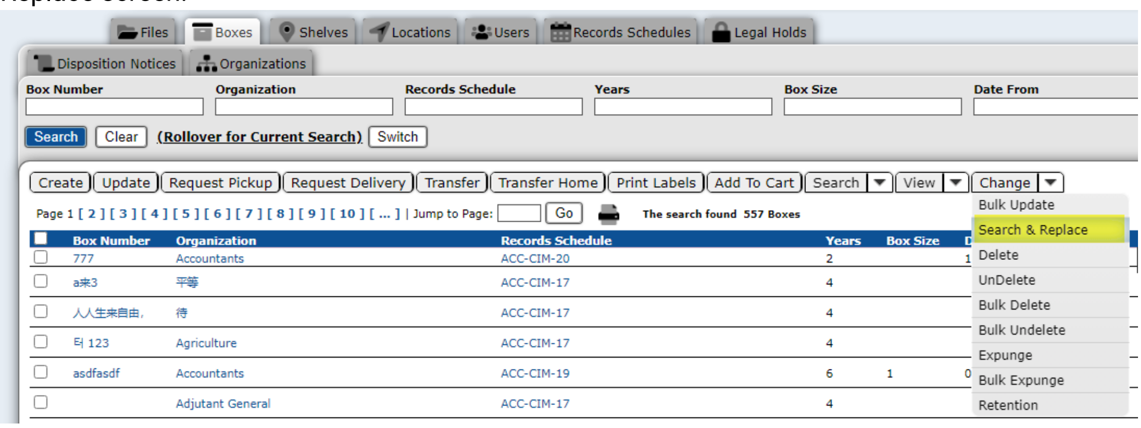
4.6.1.4.2.5 (Legacy Help) Search and Replace

The Search and Replace feature allows you to search for a specific word or phrase within a data field for a specified tab and replace it with a different word or phrase.

This process, depending upon the exact change you make, may be irreversible. Execute with care!

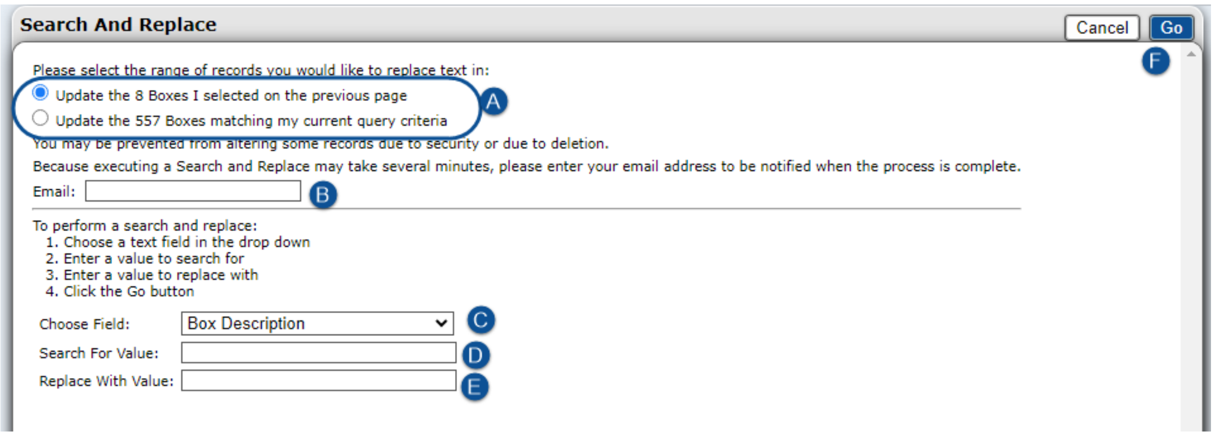
To execute a Search and Replace:

1. Choose a Tab and, if needed, run a search to pull up the records you seek to change.
2. Select the specific records upon which to perform the Search and Replace. Not making a selection will choose all records.
3. Select the 'Change' action button and choose 'Search and Replace'. This opens the Search and Replace screen.



4. On the Search and Replace page, choose to either update the selected records or all records from the previous query. (A)
5. Since the Search And Replace can be a resource intensive activity, Gimmal Physical will execute this in a separate process and email you the results. Enter your email in the Email text box. (B)

6. Choose the data field for which you wish to replace values from the Choose Field drop down list. (C)
7. Enter a value to search for in the Search For Value text box. (D)
8. Enter the replacement value in the Replace With Value text box. (E)
9. Click the Go button. (F)
10. If an email was entered in Step 5, you will be notified by email when the Search And Replace is complete.



Additional search options can be found in the Search Overview (see page 388).

4.6.1.4.2.6 (Legacy Help) Configure Label Profiles

This topic is part of the Printing Labels tutorial. Click here[104] to view.

Label Profiles are templates that can be reused for custom label specifications. They are used to specify the following:

- **Data Tab**: The item type/data tab the label is for. This is usually Files or Boxes but could be for other item types in your application.
- **Design File**: The design file contains the overall dimensions, layout, and other design properties of the label.
- **Number of labels per page**: The number of labels to be printed per page, corresponding to the label stock being used.
- **Profile Name**: Name of the label profile to find and use later.
- Which fields for the selected data tab are printed on the label

Basic Label Profiles

Out of the box, Gimmal Physical includes several basic black and white label profiles, based on the Avery 5163 label stock.

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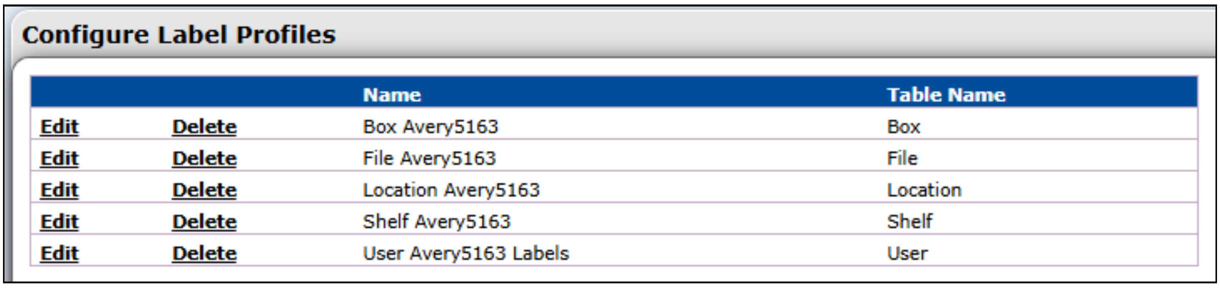
104. https://gimmal.navattic.com/ql108di

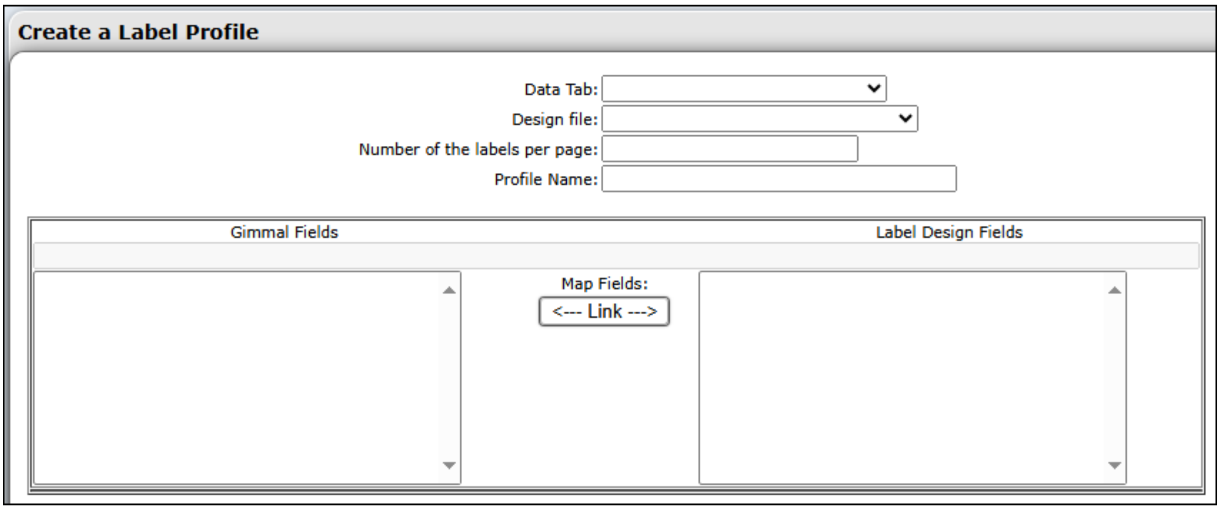


37 Included Basic Label Profiles

Custom Label Profiles

Gimmal Physical offers the option to create your own label templates using different stock or different layouts. To do so, you must first configure a new label profile.

1. Browse to Admin->Configuration->Label Profiles, this will take you to the Configure Label Profiles page (see image above).
2. Click on the **Add Profile** link to open the **Create a Label Profile** screen.



38 Creating a new label profile

3. Enter/select the information for the new profile as indicated below.

- **Data Tab**: Choose the type of item you are creating a label profile for. The **Gimmal Fields** pane on the left will populate/update as you change Data Tab selections.
- **Design File**: Select the appropriate design file to be used for this label profile. The list of design files presented reflects only what has already been uploaded to the application. The **Label Design Fields** pane on the right will populate/update as you change Design File selections.

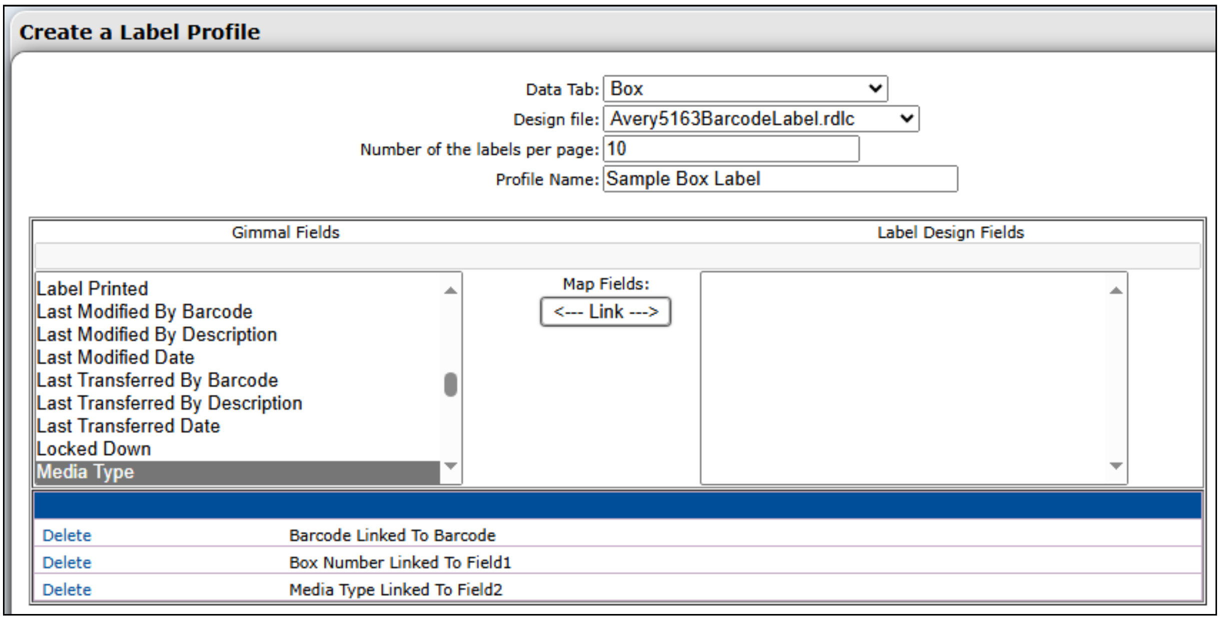
To add a new design file:

- Save the file (see note below) to your local computer.
- Browse to Admin->Configuration->Label Design Files
- Click **Choose File** and browse to the saved design file.

- Click **Upload File** to add the design file to the list of available files.
- A new label profile may now be created based on the uploaded design.

Creating new label design files is performed outside of the Gimmal Physical application and is beyond the scope of this documentation. If you require a new label design, please reach out to your Gimmal Account Manager or Gimmal Support.

- **Number of labels per page**: Enter the number of labels per page, corresponding to the label stock you have procured. Note that even though the label size is the same, the labels per page might differ due to the format, i.e., a standard letter page size vs. a roll of labels.
- **Profile name**: Enter a meaningful name. This is especially important if you have different labels for the same item type.
- **Label fields**: Map the desired fields in Gimmal Physical to the appropriate field in the label design. Highlight matching fields in each pane and then click the **<--Link-->** button.



39 *Final Profile configuration*

- It does not matter in which order you create field mappings.
- If you need to remove/redo a field mapping, simply click the Delete link at the left.
- You can only map a single field from Gimmal Physical to each label field.
- You can map a single field from Gimmal Physical to multiple label fields.

4. Click **Finish** to save the Label Profile configuration.

4.6.1.4.2.7 (Legacy Help) Connectors & Integrations

Gimmal Physical offers a number of connectors and third party integrations to help you make the most of your records management system.

Use the tree view on the left or the links below to navigate to the guide of interest.

(Legacy Help) FileConnect Guide

Contents

Overview

FileConnect allows users to configure a service that automatically imports correctly formatted files to facilitate the automation of imports into Gimmal Physical.

FileConnect is comprised of 2 components:

1. FileConnect (user interface)
2. FileConnect Service (Windows service)

FileConnect allows users to:

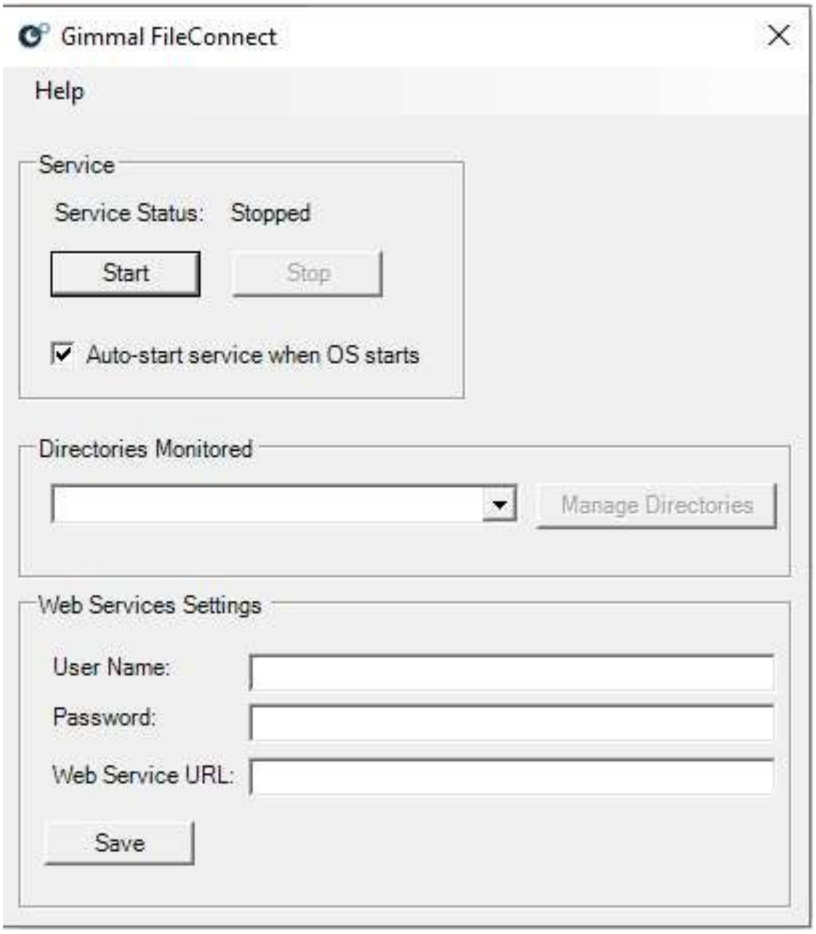
- Start and stop the FileConnect service
- Change web service settings
- Configure monitored directories

The FileConnect Service monitors the directories specified in the user interface for files that match certain criteria. When a new file is detected in a monitored directory, the FileConnect Windows service will use the Gimmal web service to upload the file and import the data it contains into the Gimmal web application.

Windows Service

1. In File Connect start the Windows service by clicking Start or stop the service by clicking Stop. (The service can also be controlled through the Windows Service application)
2. The Status of the service is displayed (Running or Stopped) in FileConnect.

3. To have the service started automatically check the checkbox 'Auto-start service when OS starts'.



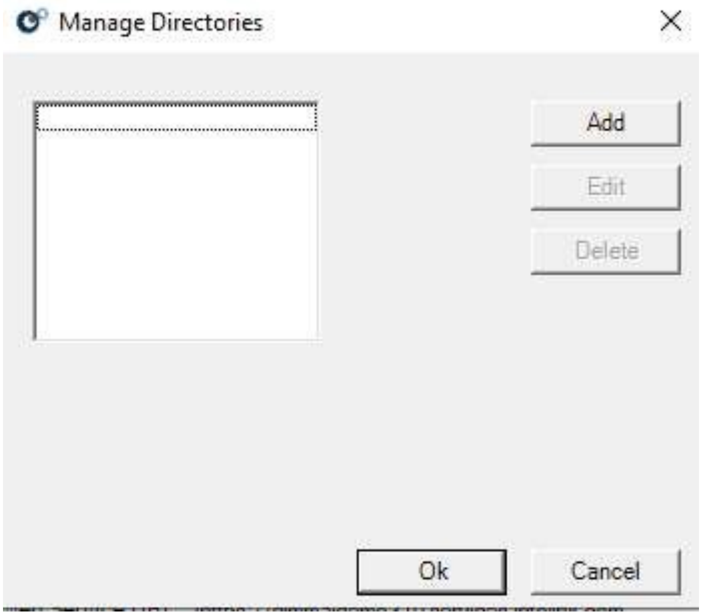
Web Service Settings

- Username – the username for connecting to the web service.
- Password – the password for connecting to the web service.
- Web Service URL – the URL for the Gimmal Physical web service
- Web Service settings are saved by clicking on the Save button below the Web Service URL.

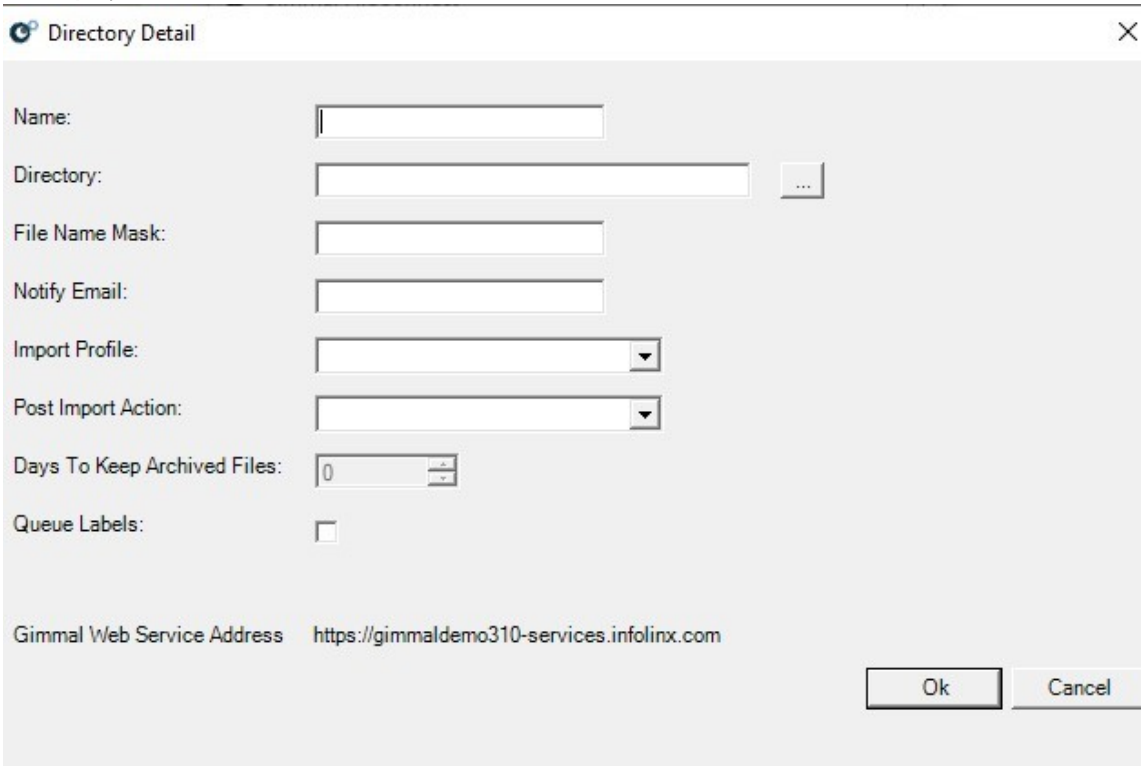
Manage Directories

1. Click Manage Directories to see the directories that FileConnect is managing.

2. To add a new monitored directory click the Add button. To edit or delete a monitored directory click the corresponding button.



3. When adding or editing a monitored directory, fill in the required information on the Directory detail page.



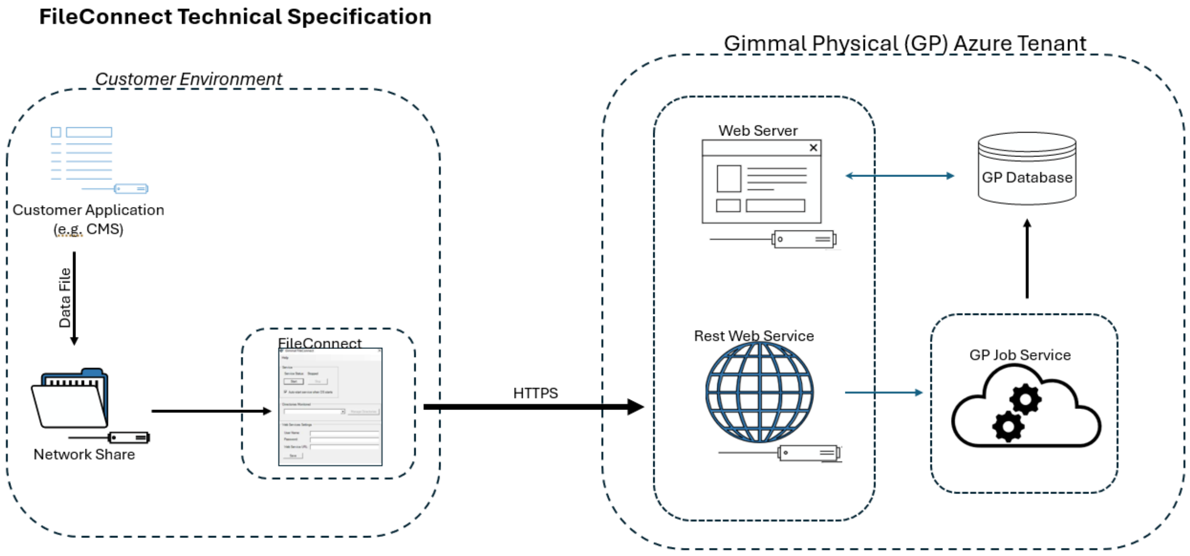
Directory Settings

- Name – the display name (in FileConnect and notification emails) of the monitored directory.

- Directory – the full path of the directory to monitor.
- Path can be a local folder or network share in UNC path.
- If a UNC path is used, the user identity running the FileConnect service must have read/write access to the network share.
- File Name Mask – an expression used to filter the files within the directory. * is used as a wildcard. For example, if the mask is *.txt, then only .txt files will be processed. A value of *.* will result in all files being processed.
- For a complete list of rules, read the documentation: https://docs.microsoft.com/enus/dotnet/api/system.io.filesystemwatcher.filter?view=netframework-4.5.2. One notable exception is that FileConnect requires a mask value to be provided, so empty string (i.e. blank) will not work.
- Notify Email – the email address to which data import notifications will be sent.
- Interchange Profile – the import profile to use when importing data from files in this directory.
- Post Import Action – Archive or Delete; Archive will put processed files in the Processed folder (a subdirectory under the monitored directory); Delete will remove processed files.
- Days to Keep Archived Files – If Archive is selected for Post Import Action, then this setting governs how many days to keep files in the Processed folder. After the specified number of days has elapsed, the old files will be deleted. If Delete is selected for Post Import Action, then this setting will be disabled.
- Queue Labels – determines whether labels will be queued in the Gimmal web application when new items are created from files in this directory.
- Click OK to save the monitored directory or click Cancel to discard changes and exit.

Data Flow

Files are first created in the customer environment. Typically these files are generated via an automated output from a customer application (e.g. a CMS system). These files are stored on a local network share. FileConnect is installed behind the firewall with access to the location where the automated files are stored. It periodically checks the defined location for any new files. Once the file is found, FIleConnect uses the configured credentials to transfer the file via HTTPS to a Rest Webservice that sits on a virtual machine in the dedicated customer Azure tenant for Gimmal Physical. The Gimmal job service parses the file and inserts the data into the Gimmal Physical database. The Gimmal Web servers host the Gimmal Physical web application which then reflects the records imported during this process.



(Legacy Help) PortableConnect User Guide

Please use the links on the right to help navigate through this document.

Getting Started

Gimmal Physical PortableConnect is a barcode scanning application that allows users to use a portable scanner to perform actions in Gimmal Physical.

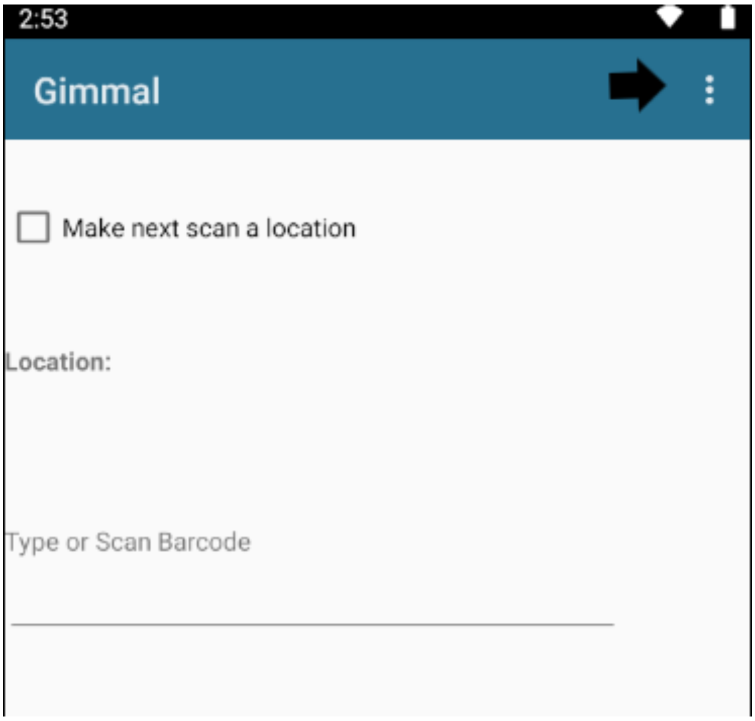
> Note: Neither RFID nor Bluetooth can be used with the PortableConnect version for Android 13 or 14.

To start using PortableConnect:

1. Unlock the portable device.
2. Tap on the Gimmal Physical PortableConnect app icon on the home screen

    • If the app icon is not on the home screen, search the device or open the app drawer and scroll until it is found.

Once in the app, tap the vertical ellipses (three dots) in the upper right corner and select the desired tab.



PortableConnect with Web Services

If using PortableConnect with Gimmal Physical Webservices, you will need:

- URL for the Gimmal Physical Webservice
- Valid Gimmal Physical login credentials

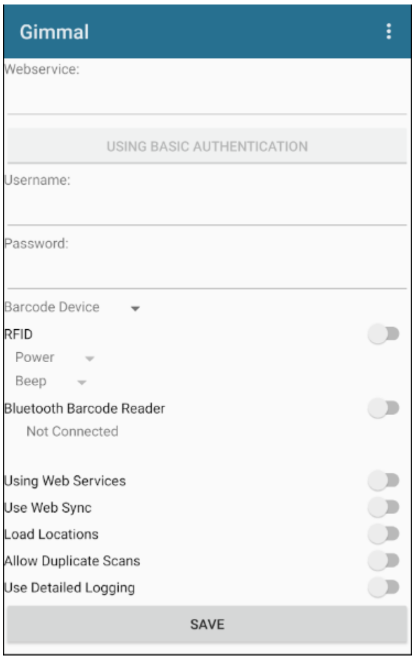
To use:

1. Go to the Preferences tab.
2. Enable 'Using Web Services' and 'Using Web Sync'
3. Enter the Webservice URL in the 'Webservice:' textbox.
4. Enter the Gimmal Physical credentials in the 'Username:' and 'Password' textboxes respectively.
5. Tap on the 'Save' button at the bottom of the page.

PortableConnect with RFID

To enable using PortableConnect with RFID:

1. Go to the Preferences tab.
2. Ensure webservices are enabled. See PortableConnect with Webservices.
3. Select the appropriate device from the 'Barcode Device' dropdown.
4. Enable 'RFID'.

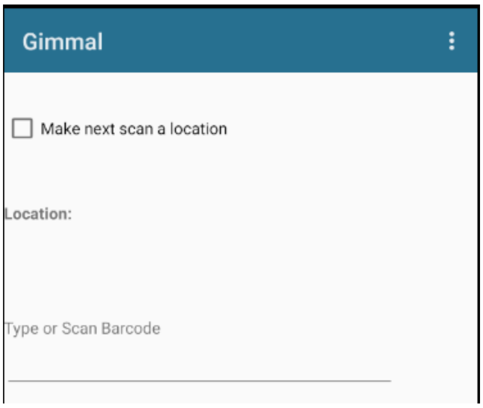


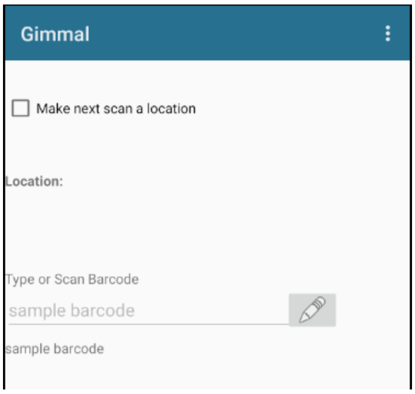
Additional Configuration

Allow Duplicate Scans: If this setting is enabled, PortableConnect will not automatically remove multiple scans of the same item.

Data Collection

To begin scanning barcodes, select Collection from the menu.





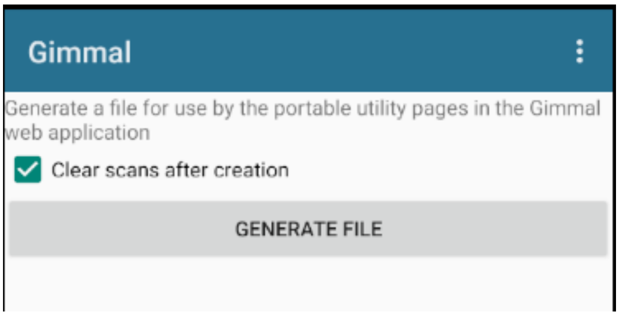
1. Set the Transfer Destination:
    a. Check the 'Make next scan a location' checkbox.
    b. Scan the barcode of the location to transfer items.
    c. If the location is successfully set, you will see the barcode scanned next to the 'Location:' label.
2. Scan the barcodes of the items to be transferred:
    a. If the barcode label is damaged or won't read, you can type it manually into the 'Type or Scan Barcode' textbox. The barcode will be logged once the enter key is hit.
3. Repeat the above process for all items to be scanned.

Data Upload

To generate a file of the transfers for upload to the Gimmal Physical application:

1. Select Create File from the menu.
2. To remove scans from the log, check the 'Clear scans after creation' checkbox.
3. Tap the 'GENERATE FILE' button.

A text file named TransferData.txt will be created in the Install Directory/Gimmal Physical Portable that can be uploaded through the Gimmal Physical Web UI.



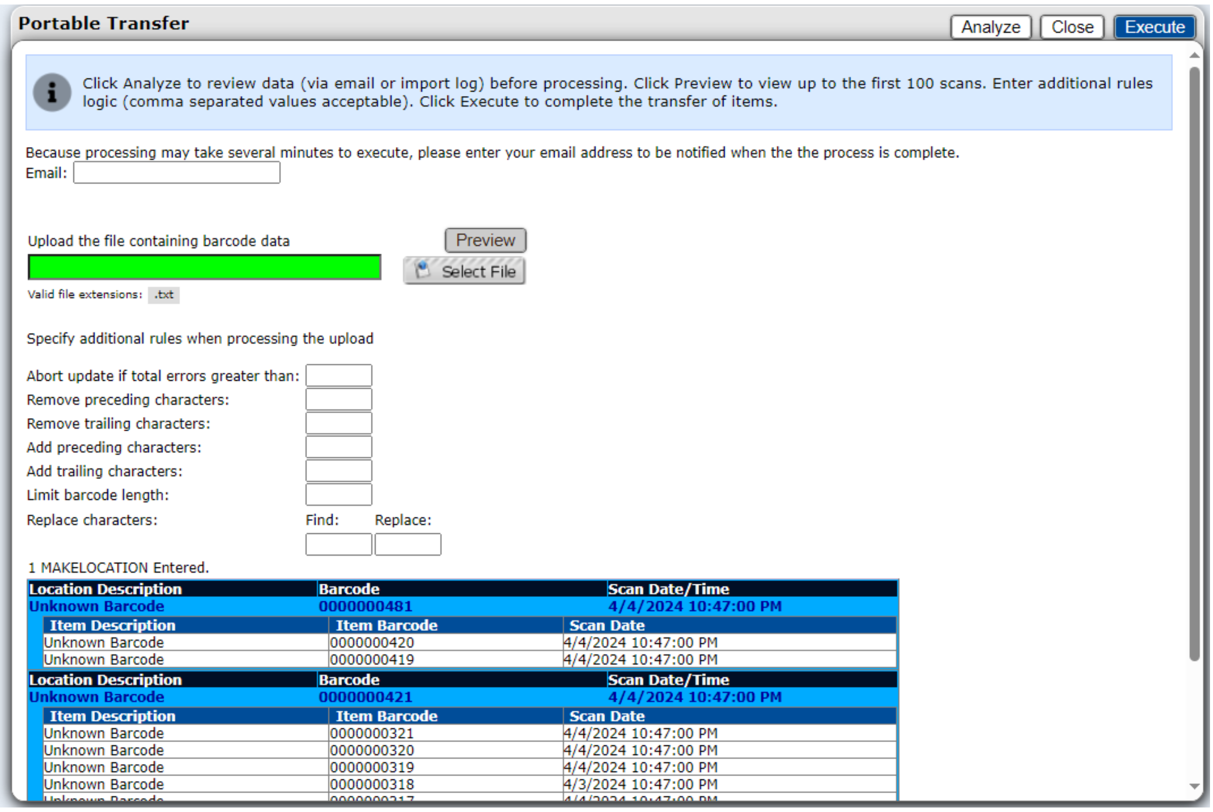
Configuring Portable File Transfer in Gimmal Physical

The options shown below reflect version 3.15 and above. For information on the configuration in previous versions, please contact support.

The Portable Transfer page contains several options that allow users with the appropriate permissions to:

- Establish Rules for Barcode Processing
- Preview and Analyze files before importing them
- Execute the upload of a transferred file

If are having problems with viewing the file, please see the Troubleshooting section at the bottom of this page.



The following options will help you complete your transfer:

Name	Description
Email:	Optional Email Address which will receive the report of the completed process or analysis once the job has been completed. Larger files can take a significant time to complete processing, so we recommend using this option to notify you when the transfer is complete.
Select File	Choose the file to be processed. The box will turn green if the file is accessible, but red if there is a problem. The transfer file must be in **.txt** format.
Preview	This option does not process the file but shows the first 100 lines on this page with a summary of the contents.
Additional Rules	These rules will be applied to the barcode values as listed in the file before processing into Gimmal Physical. They help handle certain types of legacy or 'dirty' data that may be present in the files.
Abort update if total errors are greater than:	Numeric value indicating the number of errors after which the process will be aborted. A large number of errors can indicate data or file issues and the best option would be to stop the processing of the file.
Remove preceding characters:	Enter the characters that should be removed from the beginning of the barcode line before it is ingested into Gimmal Physical. Leave blank if no characters should be removed.
Remove trailing characters:	Enter the characters that should be removed from the end of the barcode line before it is ingested into Gimmal Physical. Leave blank if no characters should be removed.

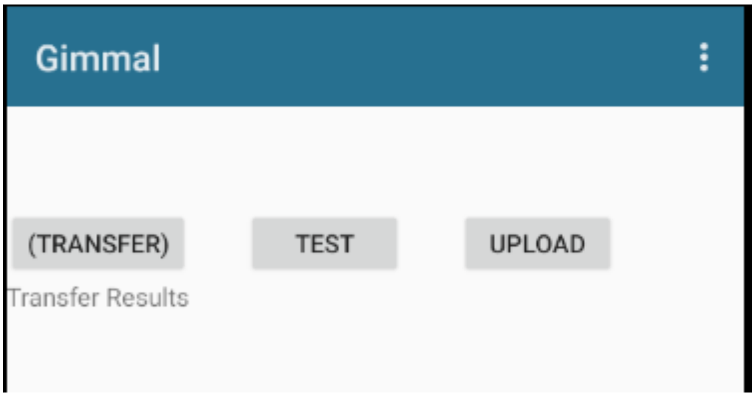
Name	Description
Add preceding characters:	Enter the characters that should be added to the beginning of the barcode line before it is ingested into Gimmal Physical. Leave blank if no characters should be added.
Add trailing characters	Enter the characters that should be added to the end of the barcode line before it is ingested into Gimmal Physical. Leave blank if no characters should be added.
Limit barcode length:	Truncate the barcode line to the entered value before it is ingested into Gimmal Physical. Characters will be removed from the end. Leave blank if the barcode should not be truncated.
Replace characters:	This option allows you to locate certain characters within the barcode as scanned into the file and replace them with others for processing within Gimmal Physical. If both are left blank, no characters will be replaced
Find:	Characters to locate and replace
Replace:	Characters to replace those found above in the 'Find' text box. If this field is left blank, but there are characters (including spaces) in the 'Find' text box, if they are found in the barcode, they will be deleted.
Analyze	Clicking this button will run the selected file through the rules as a fully featured test. An email will be generated with the results of the analysis, and there will be an entry in the logs table, but no items will be processed.
Execute	Runs the full process to upload and update the barcodes noted on the file. We recommend running the analysis first to ensure there are no outstanding issues before executing the transfer process.
Close	Exits the Portable Transfer screen and stores the values entered.

> If the 'Execute' or 'Analyze' options are used, the log file will be available from the Admin | Import Log list.

Data Update with Web Services

When using Webservices there's no need to generate a file. The scans can be uploaded directly from the device.

1. Go to the Synchronize tab.
2. Ensure the upload type is set to '(TRANSFER)'.
3. Tap the 'UPLOAD' button.
4. The results of the upload will be listed below.

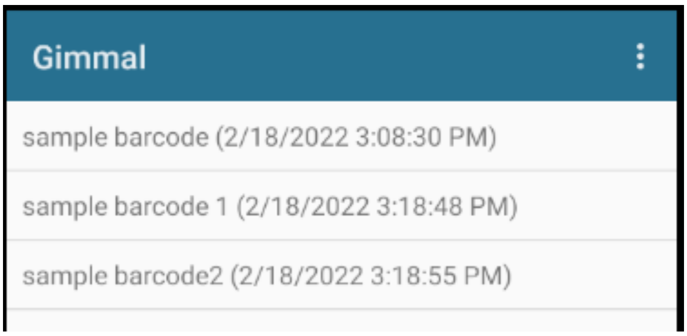


View Scanned Data

All scans are saved to a log on the device.

To view the logged scans:

1. Select History from the menu.
2. The barcode and scan date will be listed in order of scan.



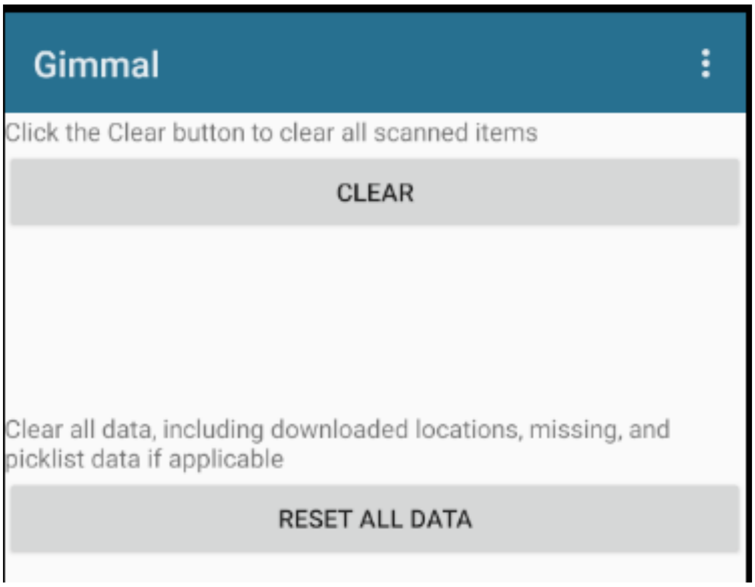
Clear Scanned Data

Once transfers are successfully uploaded, clear the scanned data log:

1. Select Clear from the menu.
2. Tap the ‘CLEAR’ button.

If there is other data saved to the device from using Webservices, you can clear from this option as well.

1. Select Clear from the menu.
2. Tap ‘RESET ALL DATA’.



Reconcile

A reconcile compares scanned data for a given location to what Gimmal Physical expects in that location, then updates Gimmal Physical to be in sync with the scanned data.

1. Scan a location barcode.
2. Scan the barcodes for all items in the location.
3. Upload the scanned data.
    a. Without webservices:
        i. Create a text file as detailed in the Data Upload section.
        ii. Copy the file to your workstation.
        iii. Upload the file through the Gimmal Physical website.
    b. With webservices:
        i. Go to the Synchronize tab.
        ii. Ensure the upload type is set to ‘(Reconcile)’.
        iii. Tap the ‘UPLOAD’ button.
        iv. The results of the reconciliation will be listed below.

A reconcile has three possible results:

1. The scanned item is in the expected location.

    a. No action is taken.
2. Gimmal Physical found a scanned item that was not expected in that location.
    a. Gimmal Physical will transfer the item to the scanned location.
3. Gimmal Physical expected an item, but it was not found in the scanned data.
    a. Gimmal Physical will mark the item as missing.

Web Service-Specific Features

To use these features Webservices must be configured as detailed under PortableConnect with Webservices in this document.

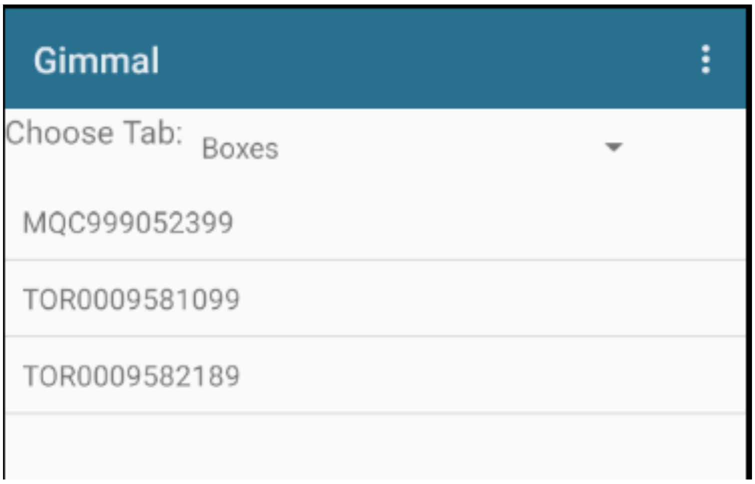
Missing Records

To view a list of missing records in Gimmal Physical via PortableConnect:

1. Select the Missing tab.
2. Select the item tab to view missing items.
3. The items will populate below (see right).

If using RFID with PortableConnect, a 'DETECT' button will appear upon tapping on the item.

Tapping the 'DETECT' button will change the tab to the Detector tab and preload the item barcode. See PortableConnect with RFID for more information.

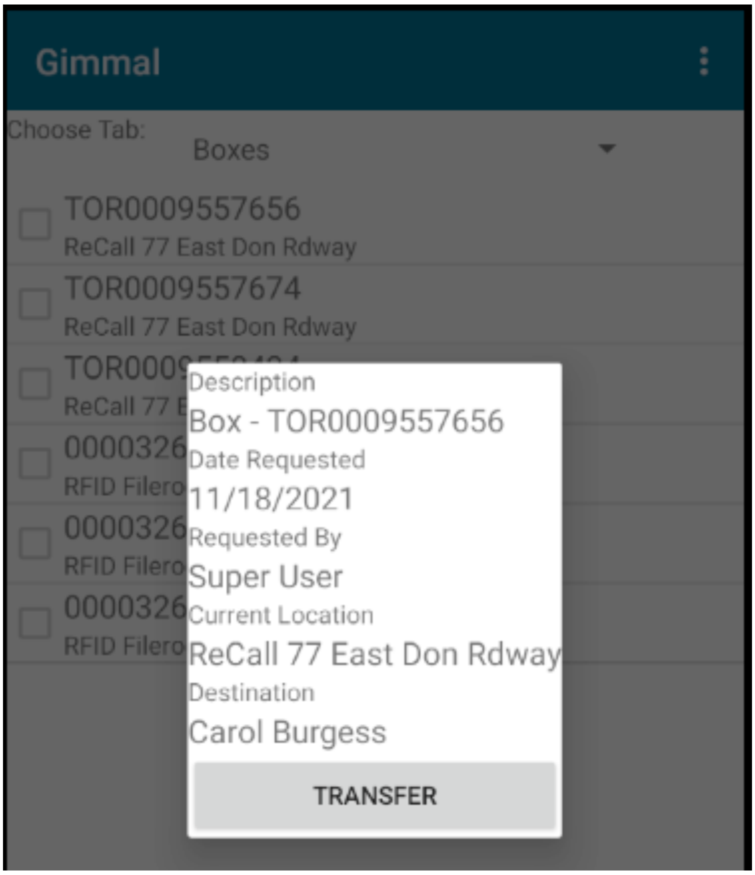


Picklist

PortableConnect with Webservices can be used to fulfill valid requests in Gimmal Physical.

1. Navigate to the Picklist tab.
2. Select the item tab to view valid requests.
3. Tap on the request to mark it as fulfilled.
4. Tap the 'TRANSFER' button.

This will add the appropriate barcodes to the log and mark the request as complete on the device. To complete the request and update Gimmal Physical an upload must be performed.

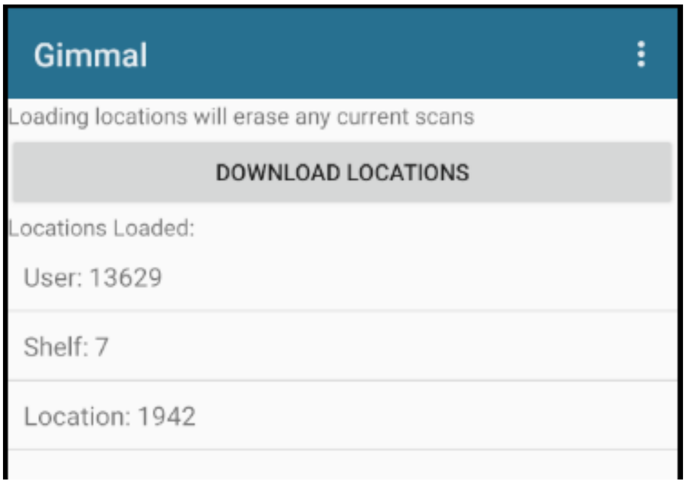


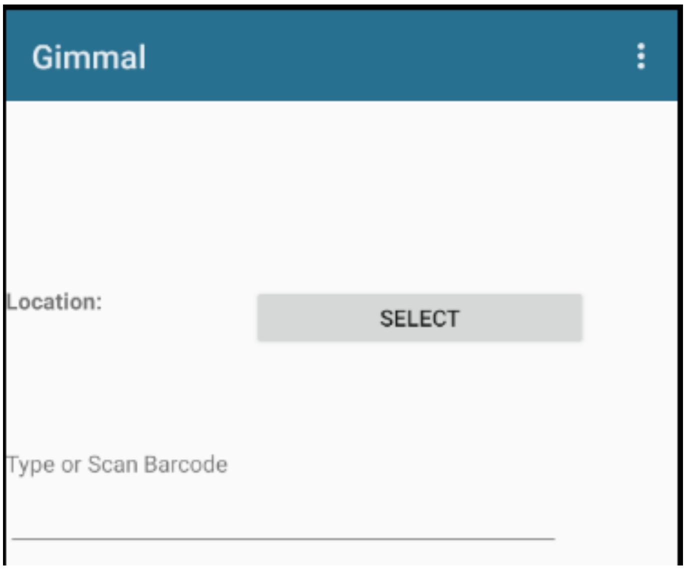
If using RFID with PortableConnect: a ‘DETECT’ button will appear on the request. Tapping the ‘DETECT’ button will change the tab to the Detector tab and preload the item barcode. See PortableConnect with RFID.

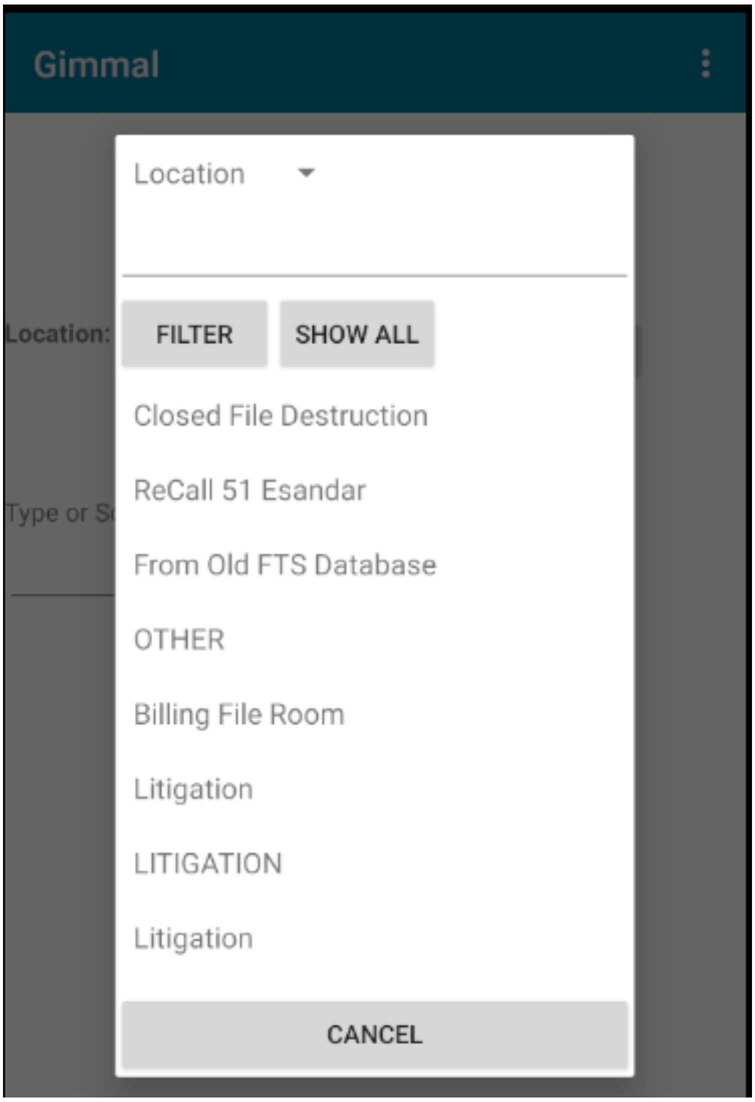
Load Locations

When using Webservices, PortableConnect can preload the list of possible locations from Gimmal Physical.

1. Go to the Preferences tab.
2. Enable ‘Load Locations’
3. Tap ‘SAVE’.
4. Go to the Locations tab.
5. Tap ‘DOWNLOAD LOCATIONS’; Wait for the download to complete.
6. Navigate to the Collection tab.
7. Tap the ‘SELECT’ button adjacent to the ‘Locations:’ label.
8. Select the location’s item tab.
9. Tap a location from the list to prepopulate the location.


Gimmal
Loading locations will erase any current scans
DOWNLOAD LOCATIONS
Locations Loaded:
User: 13629
Shelf: 7
Location: 1942


Gimmal
Location:
SELECT
Type or Scan Barcode



RFID Specific Features

Detector: PortableConnect with RFID can be used to locate missing items.

1. Navigate to the Detector Tab.
2. Enter the barcode of the item to locate it.
3. Tap 'READY TO SCAN'.

The device will beep if you are within range of the item and increase beeping the closer the device becomes.

TC5x Device Preparation Checklist

Parts required

- TC5x Scanner
- Docking Station

- USB cable
- Power cable (three parts)

Initialization Steps

1. Assemble the power cable:
    a. Connect the three power cable pieces.
    b. Plug the power cable into the dock.
    c. Plug the power cable into a wall outlet.
2. Connect the USB cable to the dock and a PC.
3. Install a battery into the back of the scanner.
4. Dock the scanner and allow it to charge.
   Note: Full battery is ideal, but not required.
5. Once the scanner powers on, go to Settings and update the Date and Time.
   Note: *Automatic* should be disabled while setting the date and time, and then re-enabled once it is accurate.
6. Swipe down from the top of the scanner (while it is still docked) and change the USB connection type to *Transfer Files*. If you do not see this option, please see Troubleshooting Note below.
7. Copy the latest version of the APK that was delivered with these instructions. Paste it directly into the Internal shared storage drive of the scanner.
8. Install the APK:
    a. Take the scanner out of the dock.
    b. Unlock the scanner.
    c. Navigate to the Home Screen, and swipe up from the bottom to get to the App Drawer.
    d. Locate the File Browser app and browse to the top directory of Internal shared storage.
    e. Double-click on the Gimmal.GimalPortableConnect.apk and follow the installation steps.
    f. Select Open as the last step.
9. Select the square in the bottom-right corner and then use the Clear All button to reset the Gimmal Portable Connect app.
10. To locate the Gimmal Portable Connect app, navigate to the Home Screen and swipe up from the bottom. Note: For easier access, tap and hold and then drag the app icon onto the Home Screen
11. We recommend adding the Settings to the Home Page of the scanner for easier troubleshooting.

Troubleshooting

Changing Default USB Connection to enable File Transfer

Whenever the TC5x is docked, the USB connection type defaults to ***USB Charging***. Because of this, the Internal Shared Storage is NOT available for browsing. To access the shared drive to drop the APK file or capture the TransferData file, the user must first change the USB connection type. The methodology differs based on the version of Android.

Newer Versions of Android

To enable file transfer on more recent versions of Android:

1. Dock the scanner
2. Swipe down from the top of the screen to open the Notification Pane,
3. Choose the ribbon for USB Charging
4. Change the selection to File Transfer.

Older Versions of Android

To enable file transfer on older versions of Android:

1. Navigate to the device Settings, then locate About Phone.
2. Quickly tap on the Build Number at least times to enable Developer Options.
3. Return to the main Settings list.
4. Choose System.
5. Select Developer Options.
6. Scroll down to locate the Default USB Connection,
7. Choose File Transfer.

If neither option works for your version of Android, please contact Gimmal Support at support@gimmal.com[105] with the model of the scanner and the version of Android in use.

(Legacy Help) RFIDConnect User Guide

> Please note: This article is provided for existing installations only. Gimmal Physical no longer supports RFID for new customers.

Contents

Installation Settings

Gimmal Physical RFIDConnect is a Windows system tray application that allows users to interact with RFID-tagged items to perform check-in/check-out operations.

Setting Up Gimmal Physical RFIDConnect

To get started with RFIDConnect, you need:

1. RFID Reader Hostname/IP Address
2. Gimmal Physical WebServices URL

Initial Set Up

Set the WebService URL:

---

105. mailto:support@gimmal.com

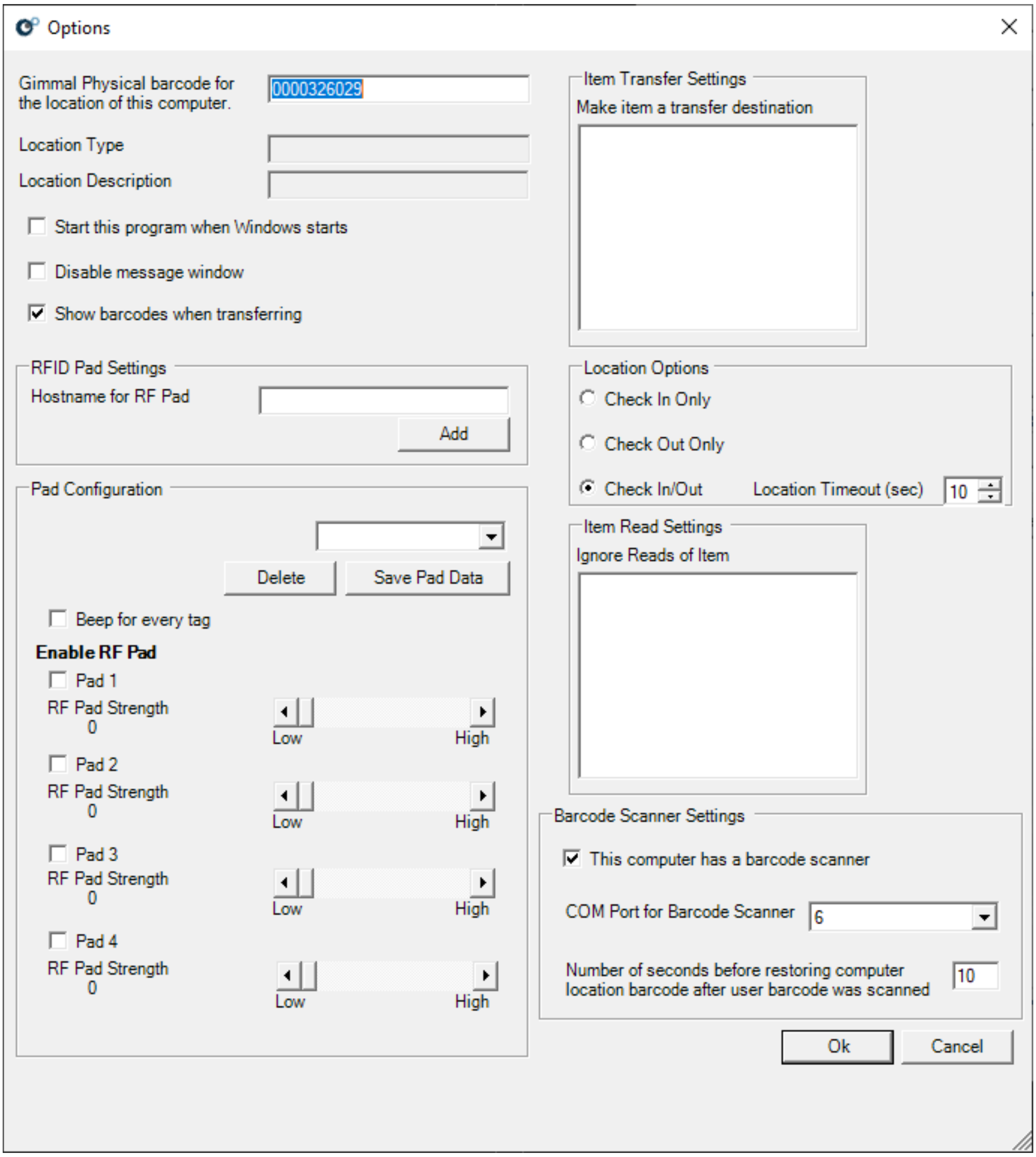
1. Navigate to the RFIDConnect installation directory.
2. Open Gimmal PhysicalRFIDConnect.exe.config in a text editor.
3. Find the setting tag where the name attribute equals “WebserviceURL”. EX:
   <setting name="WebserviceURL" serializeAs="String">

   <value></value>

   </setting>
4. Set the Value tag to the Gimmal Physical WebService URL.
5. Save the file.

Set and configure the RFID Reader and Antenna:

1. Start the application.
2. Right click on the RFIDConnect Icon in the system tray.
3. Click on Options
4. Enter the Hostname/IP Address in the ‘Hostname for RF Pad‘ text box in the RFID Pad Settings section.
5. Click Add.
6. Select the RFID Pad from the dropdown menu in the Pad Configuration section.
7. Check the appropriate boxes for each antenna attached to the reader and set the desired strength.
8. Click Ok



Configure Check-In/Out Operations:

RFIDConnect supports three Check In/Out modes.

Check-In Only

Check-in items by passing the tagged items over the antenna. The tagged item will be checked into the barcode to which the reader is set.

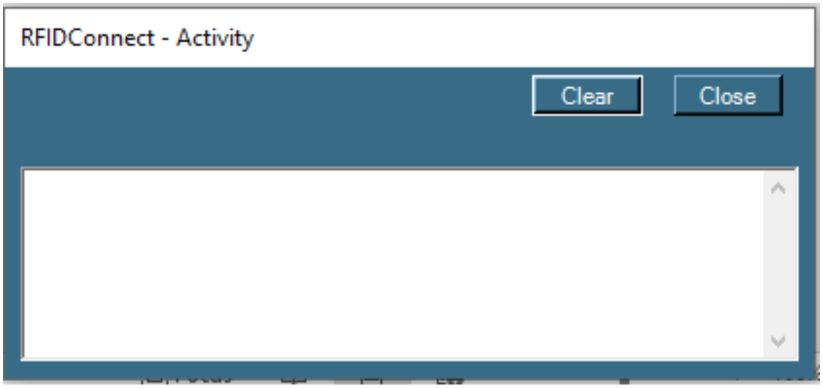
Check-Out Only

First, check out items by passing the tag for the check-out destination. Then pass the tagged item over the antenna.

Check-In/Out

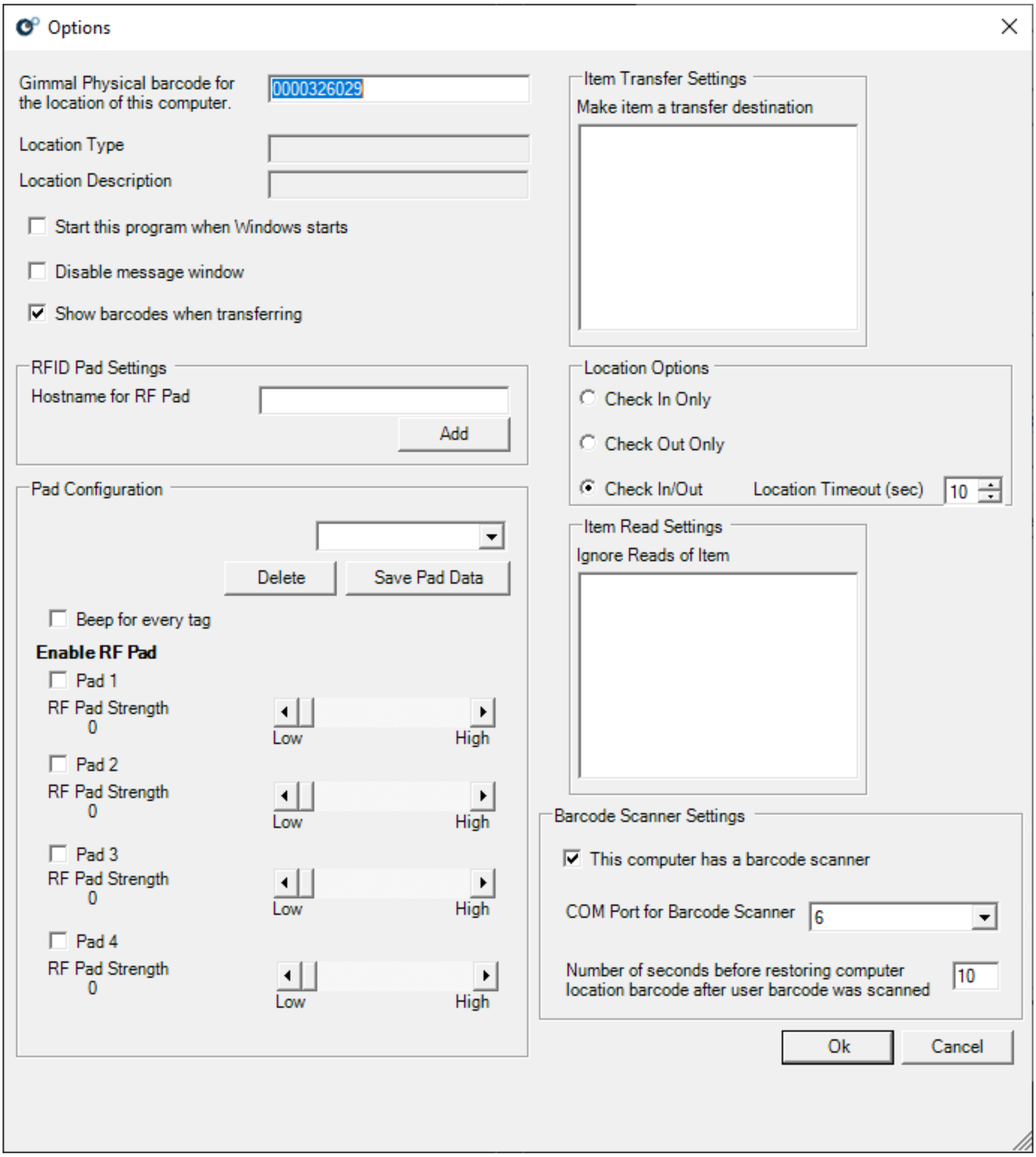
- This mode supports both check-in and check-out, with a timeout setting for the transfer destination read.
- Example: The reader detects a transfer destination, and for the next 10 seconds any items it reads will be checked out to that destination. After 10 seconds it reverts to check-in mode.

When detected, read tags will be shown in the Show Activity window. This window will open automatically unless disabled in the Options menu.



Using RFIDConnect for check-in/out requires users to define the following settings:

1. Set the Location that the RFID Reader represents: (Ex. File room, Warehouse)
    a. Start the RFIDConnect application.
    b. Right click on the RFIDConnect Icon in the system tray, and click on Options.
    c. Enter the Gimmal Physical barcode for the item that the reader represents in the ‘Gimmal Physical barcode for the location of this computer’ textbox.
    d. Click Ok.
2. Set which Tabs that the Reader will recognize as transfer destinations:
    a. Start the RFIDConnect application.
    b. Right click on the RFIDConnect Icon in the system tray, click on Options
    c. Under Item Transfer Settings check the boxes for the tabs that should be recognized as a transfer destination.
    d. Click Ok.
3. Set which Tabs to ignore reads:
    a. Start the RFIDConnect application.
    b. Right click on the RFIDConnect Icon in the system tray, click on Options
    c. Under Ignore Reads of Item, check the boxes for the tabs that should be ignored if read.
    d. Click Ok.



Additional Options

Barcode Scanner - If using RFIDConnect at a workstation that also has a Tethered Scanner, you can use the Tethered Scanner to read destination barcodes.

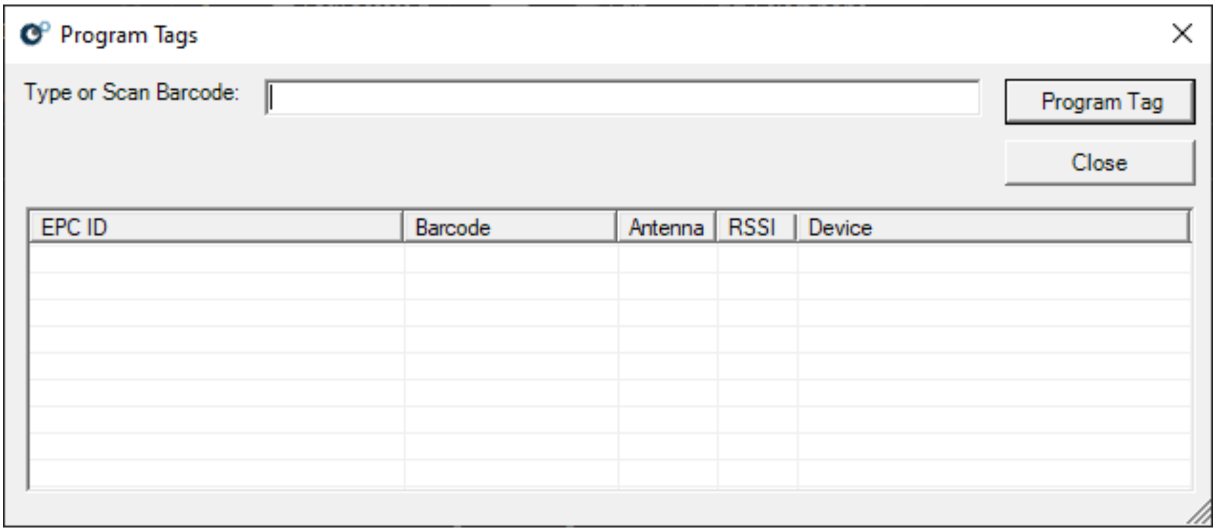
1. Start the RFIDConnect application.
2. Right click on the RFIDConnect Icon in the system tray, and click on Options.
3. Check the ‘This computer has a barcode scanner’ checkbox.

4. Select the COM port that the tethered scanner is using from the ‘COM Port for Barcode Scanner’ drop-down.
5. Click Ok

Programing Tags

RFIDConnect can also reprogram RFID tags:

1. Start the RFIDConnect application.
2. Right click on the RFIDConnect Icon in the system tray.
3. Click on Program Tags.
4. Scan the tag to reprogram.
5. Type in the new barcode.
6. Click Program Tag.



Supported Hardware

RFIDConnect supports the Zebra FX7500 RFID Reader.

Physical Characteristics

Dimensions	7.7 in. L x 5.9 in. W x 1.7 in. D (19.56 cm L x 14.99 cm W x 4.32 cm D)
Weight	1.9 lbs ± 0.1 lbs (0.86 kg ± 0.05 kg)
Housing Material	Die-cast aluminum, sheet metal, and plastic
Visual Status Indicators	Multicolor LEDs: Power, Activity, Status and Applications
Mounting	Keyhole and standard VESA (75mm x 75mm)
Environmental	
Operating Temp.	-4° to +131° F/-20° to +55° C
Storage Temp.	-40° to +158° F/-40° to +70° C
Humidity	5-95% non-condensing
Shock/Vibration	MIL- STD-810G
Regulatory Compliance	
Safety	UL 60950-01, UL 2043, IEC 60950-1, EN 60950-1
RF/EMI/EMC	FCC Part 15, RSS 210, EN 302 208, ICES-003 Class B, EN 301 489-1/3
SAR/MPE	FCC 47CFR2:OET Bulletin 65; EN 50364
Other	ROHS, WEEE
Connectivity	
Communications	10/100 BaseT Ethernet (RJ45) w/ POE support; USB Client (USB Type B), USB Host Port (Type A)
General Purpose I/O	2 inputs, 3 outputs, optically isolated (Terminal Block)

Power Supply	POE, POE+ or +24V DC (UL Approved) 12V-48VDC operation can be supported
Antenna Ports	FX 7500-2: 2 mono-static ports (Reverse Polarity TNC) FX 7500-4: 4 mono-static ports (Reverse Polarity TNC)
Hardware, OS, and Firmware Management	
Processor	Texas Instruments AM3505 (600 Mhz)
Memory	Flash 512 MB; DRAM 256 MB
Operating System	Linux
Firmware Upgrade	Web-based and remote firmware upgrade capabilities
Management Protocols	RM 1.0.1 (with XML over HTTP/HTTPS and SNMP binding); RDMP
Network Services	DHCP, HTTPS, FTPS, SFPT, SSH, HTTP, FTP, SNMP and NTP
Network Stack	IPv4 and IPv6
Security	Transport Layer Security Ver 1.2, FIPS-140
Air Protocols	EPCglobal UHF Class 1 Gen2, ISO 18000-6C
Frequency (UHF Band)	Global Reader: 902 MHz – 928 MHz (Maximum, supports countries that use a part of this band), 865 MHz – 868 MHz US (only) Reader: 902 MHz – 928 MHz
Transmit Power Output	10 dBm to +31.5 dBm (POE+, 12V ~ 48V External DC, Universal 24V DC Power Supply); +10 dBm to +30.0 dBm (POE)
Max. Receive Sensitivity	-82 dBm
IP Addressing	Static and Dynamic

Host Interface Protocol	LLRP
API Support	Host Applications – .NET, C, and Java EMDK; Embedded Applications – C & Java SDK
Warranty	The FX7500-2 and FX7500-4 are warrantied against defects in workmanship and materials for one year (12 months) from the date of shipment, provided the product remains unmodified and is operated under normal and proper conditions.

(Legacy Help) ScannerConnect User Guide

Contents

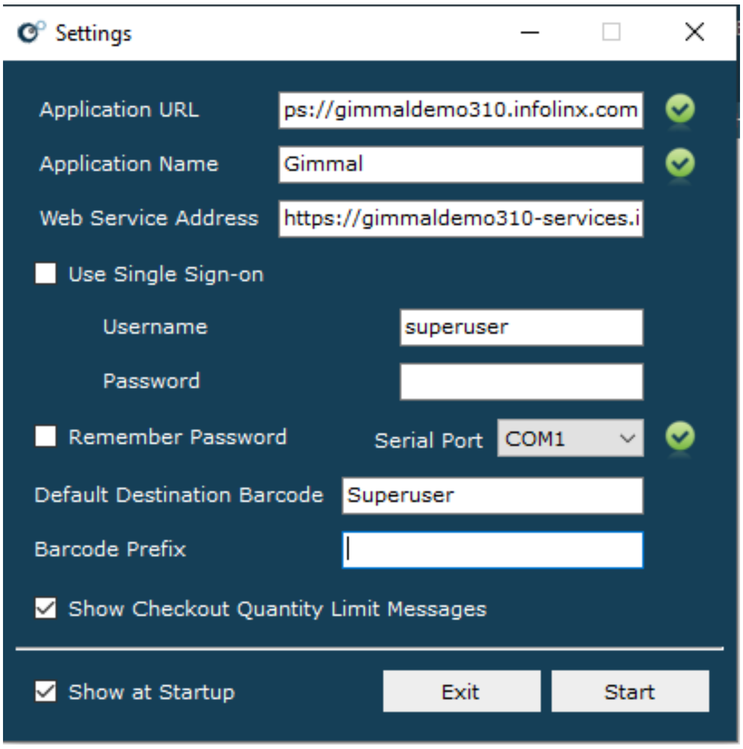
Settings

Installation Settings

ScannerConnect allows users to transfer records in the Gimmal Physical application with a tethered scanner device.

To configure ScannerConnect, enter the Settings options to match your organization's configuration .

> The data entered in the screenshot below is SAMPLE DATA for example purposes only. Please enter the values specific to your organization.



*Green **check mark:** Settings are valid*

Required Settings

- **Application URL -** the base URL for the Gimmal Physical web application (e.g. https://gimmal.example.com).
- **Application Name -** The name of the application as found under *Admin | Technical Information* in the Gimmal Physical Application.
- **Web Service Address -** the URL for the Gimmal Physical web service. The format will differ if your Gimmal Physical is on-premises or in the Cloud
  - Cloud example: https://client-services.gimmal.com[106]. Please contact Gimmal to verify the correct Web Service Address.
  - On-Premises: This should be the URL to their Physical Records REST API site. example: https://sitename-services.example.com
- **Web Service Credentials –**
  - **SSO -** A browser window will open when the user checks the User Single Sign-on checkbox, and the user will need to be authenticated against their SSO provider.
    - **Important Note**

      Only Service Provider (SP) initiated SAML2 workflow is supported. Identity Provider (IdP) initiated workflow is not supported.

106. https://client-services.gimmal.com/

- **Basic –** Username and password must be entered**.**
- **If the credentials are invalid,** or ScannerConnect cannot connect to the web a red icon will appear next to the Web Service Address textbox.
    - Hover over this icon to view additional details on this issue.

Serial Port – this is the COM port through which the program receives input from the tethered scanner (e.g. COM 1). If the scanner is connected to the user's computer, they can open Device Manager and expand the node entitled Ports (COM & LPT) to see which serial port needs to be selected in ScannerConnect.

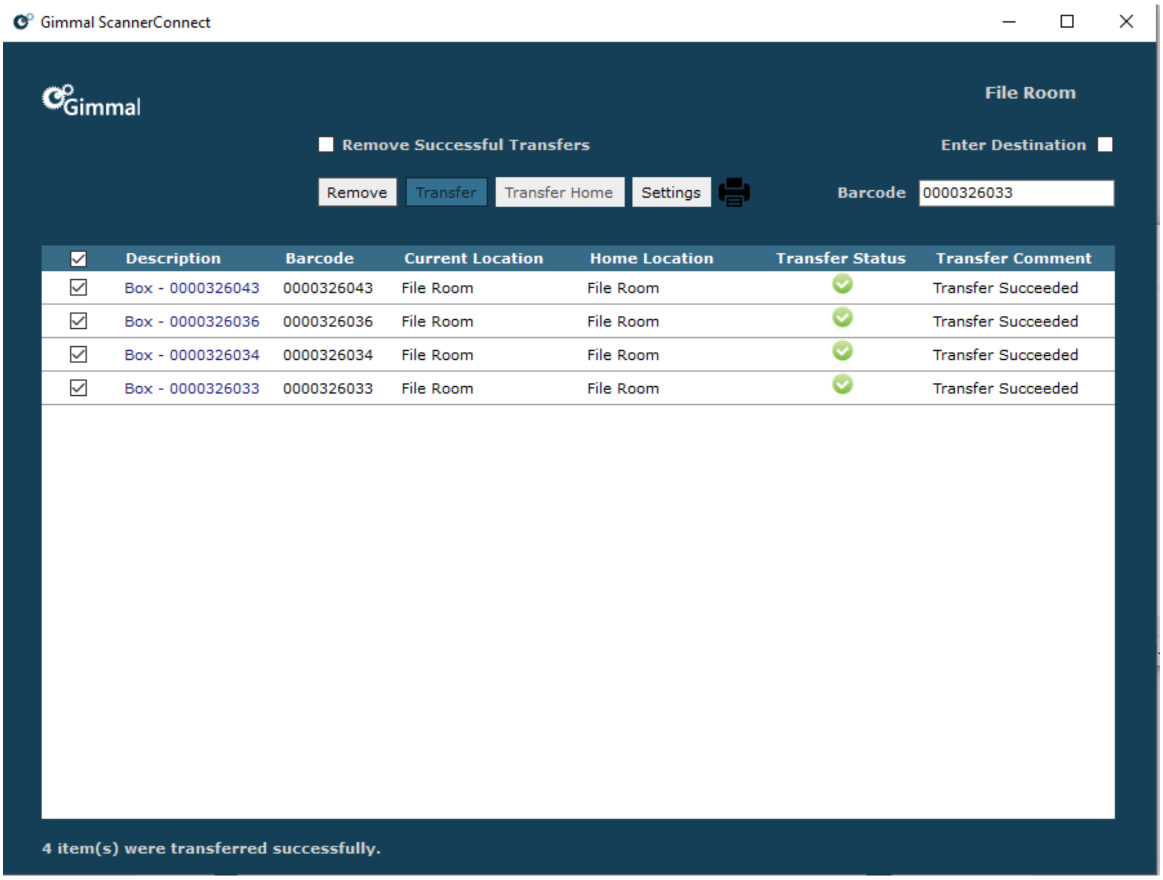
Optional Settings

- **Remember Password -** determines whether ScannerConnect stores the user's web service credentials when using basic authentication.
- **Default Destination Barcode -** the barcode of the destination to which items will be transferred if no other destination is provided. Without a default, a destination must be scanned for every transfer.
- **Barcode Prefix –** text which will be prepended to all scanned barcodes.
- **Show Checkout Quantity Limit Messages –** determines whether ScannerConnect displays warnings when the number of items transferred to a user puts them over the allowed limit. The limit is set as a preference in the web application.
- **Show at Startup –** determines whether the Settings menu will be displayed every time the application starts.

To exit without saving changes, click 'Cancel'. To save changes, click 'OK'. The Settings menu can be accessed at any time by clicking 'Settings'.

Using ScannerConnect

ScannerConnect allows you to perform transfers either by selecting the items and clicking 'Transfer', scanning the Transfer action barcode, or pressing 'Enter' from your keyboard.



Transfer

The destination may be scanned at any time; it does not need to be scanned before or after the items to be transferred.

To Transfer Items

1. Scan the barcodes of the items and the barcode of the transfer destination.
2. Click ‘Transfer’ or scan the Transfer action barcode to transfer the selected items.

Note:

- Scanning another destination will override the existing destination. If the item type of a scanned barcode cannot be transferred (e.g. Location, User), ScannerConnect will automatically recognize it as the destination.
- However, if the item type of a scanned barcode can be transferred (e.g. Box), then check the ‘Enter Destination’ checkbox or scan the Make Location barcode to select the next received scan as the destination.
- Item barcodes and destination barcodes may also be entered manually in the Barcode textbox.

Home Transfer

To Transfer the selected items back to Home Location:

1. Scan the barcodes of one or more items (a destination does not need to be scanned).
2. Click 'Transfer Home' or scan the Home Transfer action barcode to return the selected items to their respective home locations. Item barcodes may also be entered manually in the Barcode textbox.

Remove

One or more scanned items may be removed from the grid at any time.

1. Select the items you would like to remove in the grid and click 'Remove' or scan the Close action barcode.
2. ScannerConnect can also be configured to automatically remove items from the grid when they are successfully transferred. This is done by checking the Remove Successful Transfers checkbox.

Print

The items in the grid and the transfer results displayed in the grid may be printed at any time by clicking the printer icon next to the Settings button.

Other

- Clicking on the Gimmal Physical logo in the top left corner of the application window will open a web browser and navigate to the Application URL specified on the Settings menu.
- Scanned items displayed in the grid will include hyperlinks to the view page of each item in the Gimmal Physical web application.

Keyboard Shortcuts

- **Enter**: If focus is on the Barcode textbox, ScannerConnect will try to find the item in Gimmal Physical. This is equivalent to scanning the item. If focus is not on the Barcode textbox, pressing the Enter key will transfer the selected items. This is equivalent to clicking the Transfer button or scanning the Transfer action barcode**.**
- **Ctl + R:** Remove selected items from the grid. This is equivalent to clicking the Remove button or scanning the Close action barcode.
- **Ctl + H:** Transfer selected items to their respective homes. This is equivalent to clicking the Transfer Home button or scanning the Home Transfer action barcode.
- **Ctl + S:** Open the Settings menu. This is equivalent to clicking the Settings button.
- **Ctl + M:** Toggle the setting Remove Successful Transfers. This is equivalent to clicking the checkbox of the same name.
- **Ctl + D:** Toggle the Enter Destination switch. This is equivalent to clicking the checkbox of the same name or scanning the Make Location action barcode.
- **Ctl + B:** Set focus on the Barcode textbox (to begin typing a barcode without using the mouse).
- **Ctl + L:** Selects or deselects all items in the grid. This is equivalent to clicking the checkbox in the top left corner of the grid.

(Legacy Help) User Guide for Gimmal Records Connector

Electronic and physical records can now use a single file plan with the Gimmal Records Connector. Changes in Gimmal Records will automatically populate record schedules in Gimmal Physical.

Details

- *Record Schedules* in Physical synced with any changes in Records Lifecycles
    - All required fields mapped as Read-Only in Physical
    - Approved users can still make and use records schedules in Physical
- Manual update with status & 'Run Now' options

Limitations

- •Actions supported: **Dispose and Delete**, **Permanent**
- •Date based retention Only
- •Single phase only

Configuration

Navigate to Admin | Application Settings to configure the values for the Gimmal Records Connector.

Gimmal Records Username	Phys-conn@gimmal.com
Gimmal Records Password	•••••••••••••
Gimmal Records URL	https://dev.recordlion.net/
Update Schedules from Gimmal Records	Run Now
Gimmal Records Schedule Sync Status	Failed on 4/25/2023 1:41:54 PM

- *Gimmal Records Username* - Service account with access to Gimmal Records
- *Gimmal Records Password* - Password for the Service Account that has access to Gimmal Records
- *Gimmal Records URL* - URL of the instance of Gimmal Records for this client
- *Update Schedules from Gimmal Records - **Run Now*** - button used to start a synchronization and update. Clicking this button will:
    - Add new record schedules from Gimmal Records to Gimmal Physical which match the criteria
    - Update existing Record Schedules in Gimmal Physical with changes made in Gimmal Records.
    - Mark records schedules as obsolete if they have been deleted from Gimmal Records and have boxes associated with them in Gimmal Physical.
- *Gimmal Records Schedule Sync Status* - The status of the last run of the Gimmal Records Connector.

(Legacy Help) Iron Mountain Integration Guide

Overview

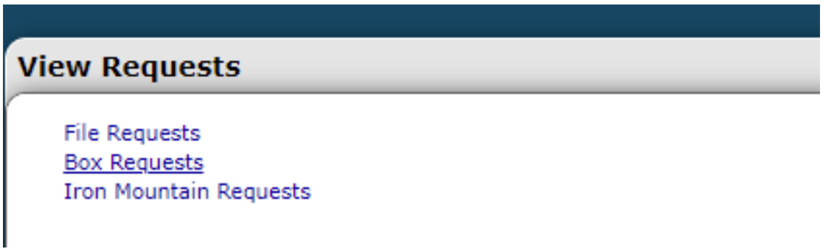
The document covers the Gimmal Physical Iron Mountain integration.

- Iron Mountain integration can only be linked to Boxes and/or Files to process order files (.ord).
- Open shelving orders are not supported.
- When requests are sent to Iron Mountain, you have a choice of whether items are automatically transferred in Gimmal Physical to the destination of the request.
- The integration does not support maintenance files (.mnt) to update metadata for Iron Mountain unique box numbers (SKP).
- The integration does not consume the nightly files Iron Mountain posts on the FTP site (aka SFTP) every 24 hours which indicates the request status.

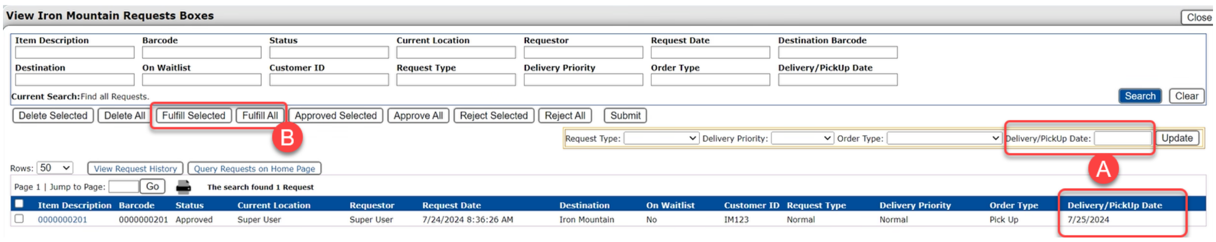
Features

Manage and Review Iron Mountain Requests

There is an Iron Mountain Requests page to manage requests for items going to or coming from Iron Mountain. Click the 'Iron Mountain Requests' link to open the View Iron Mountain Requests page.



The View Iron Mountain Request page enables the submission of requests to the FTP site that Iron Mountain monitors.



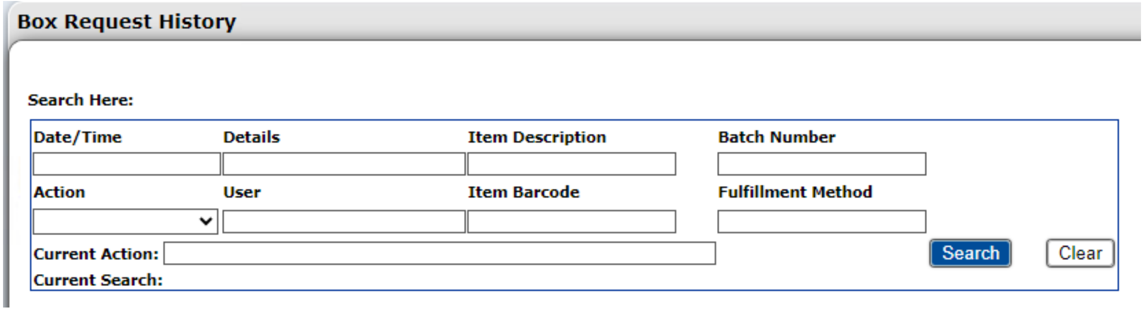
The top portion of the screen can be used to query requests with the 'Current Search' showing the applicable query in effect.

Actions are taken using the drop-down fields and buttons. Users with the appropriate permissions can override certain values on the View Iron Mountain Requests page by:

1. Selecting the request(s) to be changed from the list of requests
2. Editing the required value in the yellow section text box
3. Clicking the 'Update' button.

There are several available page options:

- The number of rows shown on the page can be adjusted using the 'Rows' Dropdown. 50 is the maximum value
- View Request History will open the '[Item] Request History' page which allows users to locate the request history by querying a variety of options



- Query Requests on the Home Page Grid will collect all items from the current query and move them to the Home Page Grid. This view has additional values, actions, and queries available for the management of the items.

The buttons listed will apply as follows:

- Delete Selected - permanently removes the requests selected in the lists and request table
- Delete All - permanently removes all the listed requests and removes them from the request table
- Fulfill Selected - Transfers the selected items after they have been submitted.
- Fulfill All - Transfers all applicable items listed on all pages. Items must first be submitted.
- Approve Selected - Approve the transfer request for the selected items.
- Approve All - Approve the transfer request for all the items on all pages of the list.
- Reject Selected - Reject the transfer request for the selected items.
- Reject All - Reject the transfer request for all the items on all pages of the list.
- Submit: Submit the item to Iron Mountain for pickup or delivery.

Note:

- Items must be 'Approved' before they can be submitted
- Depending on the setting in the Iron Mountain Integration configuration screen, users have a choice to transfer the item within Gimmal Physical immediately after the 'Submit' button is clicked or wait until a further time to transfer the items within Gimmal Physical using the Fulfill buttons

The visibility of several controls on the request page is dependent on configuration options found on the Iron Mountain Integration page:

- (A) The Delivery/Pickup Date override and column only show if the 'Scheduled' date is the chosen default option for the default Delivery Priority.
- (B)The Fulfill Selected Fulfill All buttons only appear if the 'Should items be automatically transferred when requests are submitted is set to 'No' on the Iron Mountain Integration page (see below).

Helpful Tip

A selection for Off Site Vendor is not needed for new boxes as long as the requested destination is the Iron Mountain location. Having Iron Mountain as a choice of Off-Site Vendor for a box represents the fact that Iron Mountain has knowledge of and has registered the Box. New boxes don't need this value from the Iron Mountain perspective ***until*** they are picked up for the first time. From within Gimmal Physical, the Off-Site Vendor selection will not be enabled until a new Box is first transferred to Iron Mountain. The workflow is intended to be the following:

1. The user creates a Box. At this point, the new Box will have the default *Current Location* of the User and the default *Home Location* of Iron Mountain.
2. The user requests pickup of the Box to be sent to Iron Mountain. Because the default *Home Location* is already Iron Mountain, no changes should be needed on the request page.
   Note: If the default home location was **not** set in the earlier step, ensure that the Iron Mountain location is specified as the new destination as part of the request.
3. Because the Box is being sent to Iron Mountain, it will appear in the Iron Mountain requests queue.
4. When the request is submitted from the Iron Mountain request queue page:
   a. It will be processed through the Iron Mountain integration.
   b. Gimmal Physical will transfer the Box to the Iron Mountain location within the application.
   c. This transfer step will assign the *Iron Mountain* to the Off-Site Vendor value at the Box level.
5. From this point forward, the Off-Site Vendor value will be set to Iron Mountain for that Box. Any subsequent requests for that box will go directly through the Iron Mountain queue.

Request Delivery (Retrieval) of Boxes and Files

The following options are available in the Gimmal Physical application.

- Request Type
  - Normal
  - Photocopy
  - Fax & Deliver
  - Fax & Refile
- Delivery Priority
  - Normal
  - Half Day
  - Rush

    - Scheduled
- Order Type
    - Standard Delivery
    - Pickup
    - Permanent Withdrawal

> In older versions of Gimmal Physical (3.15 and below), the Order Type is stored as a numerical value ('enum'). When searching by order types in older versions, use the number associated with the Order Types, for example:
>
> - 1 = Standard Delivery
> - 2 = Pickup
> - 3 = Permanent Withdrawal

Request Pickup of Boxes and Files

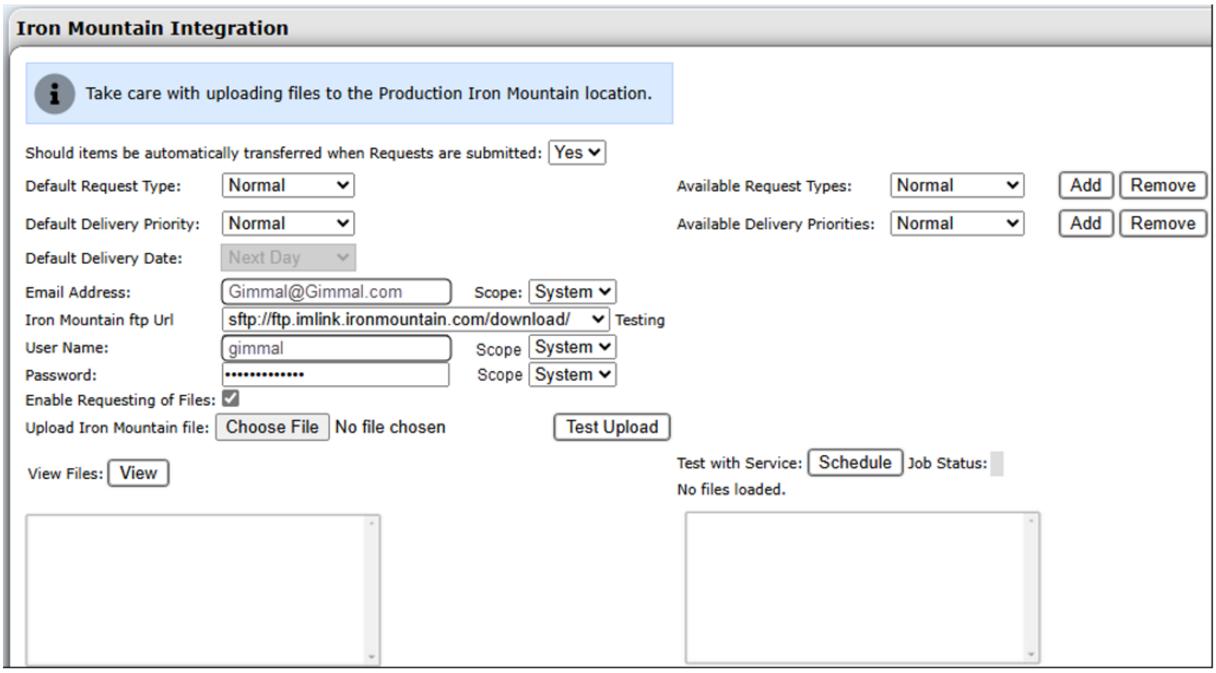
The following options are available in the Gimmal Physical application for delivery priority:

- Normal
- Half Day
- Rush
- Scheduled

Settings

For Gimmal Physical 3.15.1 and above.

The configuration settings for Iron Mountain can be found on the Iron Mountain integration page accessed via the Integration section on the Administration page reached by clicking the ‘Admin’ option on the navigation bar,



The options are as follows:

Name	Description

Should items be automatically…	This option allows for requests to automatically be transferred within Gimmal Physical once requests are submitted using the 'Submit' button.
	• Yes:
	  ◦ Enables the Submit button to transfer any approved items in Gimmal Physical once clicked
	  ◦ The Fulfill Selected and Fulfill All buttons are disabled
	• No:
	  ◦ Users must manually transfer items using Fulfill Selected or Fulfill All to have them listed as transferred in Gimmal Physical
	Note: Found in 3.15.1 and above only

Default Request Type	This choice will populate the default options for all Request Type drop-down controls in the application. *Note: Found in 3.15.1 and above only*
Available Request Type	The drop-down list shows all available options for Iron Mountain Request Types. Administrators can add as many or as few options for their end users by highlighting an item and choosing 'Add' or 'Remove'. The choices will then populate the dropdown lists for all the Request Types in the application. *Note: Found in 3.15.1 and above only*

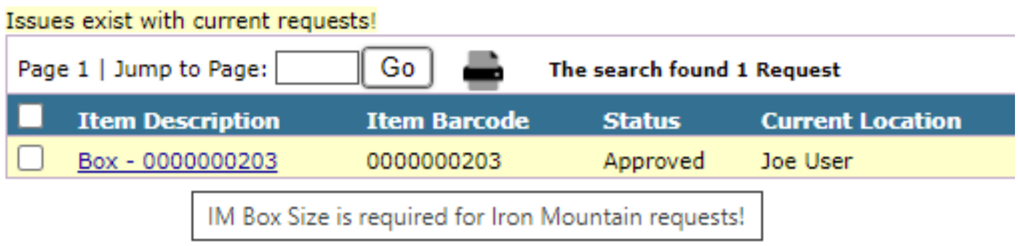
Name	Description
Default Delivery Priority	This choice will populate the default options for all Delivery Priority drop-down controls in the application. *Note: Found in 3.15.1 and above only* If Scheduled is chosen as the priority: • The **Default Delivery Date** field is enabled showing days of the week. This can then be used to calculate the scheduled delivery date. • The **Delivery/Pickup Date** override field and column are shown on the View Iron Mountain Request Page.
Available Delivery Priority	The drop-down list shows all available options for Iron Mountain Delivery Priorities. Administrators can add as many or as few options for their end users by highlighting an item in the list and choosing ‘Add’ or ‘Remove’. The choices will then populate the dropdown lists for all the Iron Mountain Delivery Priorities in the application. *Note: Found in 3.15.1 and above only*
Email Address	Address that will receive notifications from Gimmal Physical when orders are submitted to Iron Mountain. This address is valid for the scope chosen in the next field.
Scope	Who will have order notifications sent to the chosen address in the Email Address field: • System: Everyone logging into the application • Role: Everyone in the role of the logged-in user • User: Just the logged-in user
Iron Mountain FTP URI	Drop down a list of the addresses of the FTP Site to upload Iron Mountain files. The label following this drop-down list will read ***Testing*** or ***Production*** based on the value. The defaulted in this list.
User Name	Name of the account which has access to the FTP site.
Scope	Set the scope for the Iron Mountain User Name. Note: The default is ‘System’ which will be the choice for single-region customers. For customers with multi-region accounts, this option should be set to ‘User’.
Password	Password of the Iron Mountain account which has access to the FTP site.

Name	Description
Scope	Set the scope for the Password associated with the Iron Mountain User Name. It should match the scope of the User Name. Note: The default is 'System' which will be the choice for single-region customers. For customers with multi-region accounts, this option should be set to 'User'.
Enable Request of Files	Option to enable users to request files to be transferred to and from Iron Mountain. The default value is unchecked (False).
Upload Iron Mountain File	Options available to test or manually upload files in real-time or using the job service.
Choose File	Opens a dialog box to select an Iron Mountain formatted file created by Gimmal Physical to use in testing, or to manually load into the system.
Test Upload	Manual upload of a file for testing (if the URI listed is the test site) or reprocessing (if the URI listed is the production site) for the chosen file. Transfers cannot be performed when submitting an Iron Mountain request from this page, including using the 'Test Upload' button.
View	Imports the file that is on the listed FTP site into the View window (on the left for review.
Schedule	Runs the file through the scheduled job service for testing (if the URI listed is the test site) or reprocessing (if the URI listed is the production site) for the chosen file. The file processed via the service can be viewed in the box on the right side of the screen. Transfers cannot be performed when submitting an Iron Mountain request from this page, including using the 'Schedule' button.

Name	Description
Job Status	The results of the tested job, run from either the 'Test Upload' or 'Schedule'

Setup

- A location record must be designated as an Iron Mountain location by choosing Iron Mountain as the Off-Site Vendor. Multiple Iron Mountain locations are supported.
- Transit Information will also need to be entered for:
    - Any location that will have items picked up from or delivered to.
    - Any User that will have items picked up from or delivered to Iron Mountain.
- Customer record(s) will need to be created that contain the Customer ID and District ID assigned by Iron Mountain. Additionally, address information and contact name can be entered.
- Box records will need to have a current location, an IM Box Size value, a Customer ID, and a District ID before they can be requested for pickup or delivery.
- File records will need to have a current location, a Customer ID, and a District ID before they can be requested for pickup or delivery.
- If records are updated in such a way that makes them invalid for Iron Mountain requests after a successful request has been made but before they have been submitted to Iron Mountain errors will be displayed on the view requests page. Items in error will be back colored in yellow. The issue for a given record can be seen by mousing over the item description hyperlink.



For request pickups, the destination will need to be set to an Iron Mountain location.

If you are using the Iron Mountain connector with multiple Iron Mountain accounts in multiple regions (i.e. multi-region accounts), There are several items to note to ensure the correct setup:

1. Only 3.15.1 with hotfix enabled will support multi-region Iron Mountain accounts.
2. In the Configuration page Settings for the Iron Mountain Connector, the '*Scope*' for both the User Name and Password must be set to 'User'.
3. There must be an Iron Mountain location per region.
    a. The specified Iron Mountain locations must be 'Hub' locations.

4. Each user who can submit requests in Gimmal must have a separate account per region where the request will be submitted. The users must switch to the appropriate account to submit requests for the associated region.
5. In Preferences, for each of the User Accounts, the preference for Iron Mountain location must be set to the associated location or the regions.

For Gimmal Physical 3.14 and below

> If you are using the Iron Mountain integration, Gimmal strongly recommends you upgrade to 3.15.1 or above to use the most current format and advanced options.

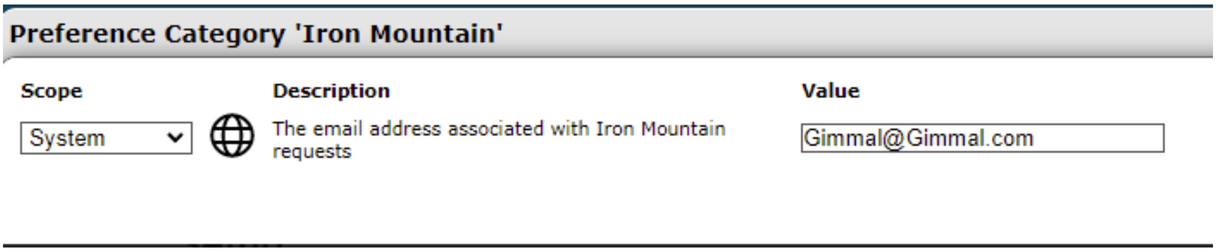
Iron Mountain account information must be entered in the Gimmal Physical Application Settings page.

The path to the folder on the ftp site associated with Iron Mountain	sftp://ftp.imlink.ironmountain.com/toplus/
The Username for the ftp site associated with Iron Mountain	gimmal
The password for the ftp site associated with Iron Mountain	•••••••••••••

- The path to the folder on the sftp site associated with Iron Mountain.
- The Username for the sftp site associated with Iron Mountain.
- The password for the sftp site associated with Iron Mountain.

Preferences

A preference setting is available to enter an email address that will receive notifications when orders are submitted to Iron Mountain.



> Note: In 3.14 or below, the integration value for locations and boxes does not choose Iron Mountain as the Off-Site Vendor. Rather there is a special checkbox noted as 'Is Iron Mountain' which designates the item as being associated with Iron Mountain.

Additional information on the technical aspects of the Iron Mountain integration can be found here.

(Legacy Help) User Guide for O'Neil Bridge Integration

Overview

This guide covers the Gimmal Physical O’Neil Bridge integration. O’Neil Software is a critical component for storage operations in many independent off-site record centers. Gimmal Physical offers a SOAP based connector to seamlessly automate the request, pick, and reconciliation of boxes with key off-site vendors. Some caveats:

- The Record Center which uses O’Neil must support the O’Neil Bridge software.
- O’Neil integration can only be used for Box orders.
- Open shelving orders are not supported.

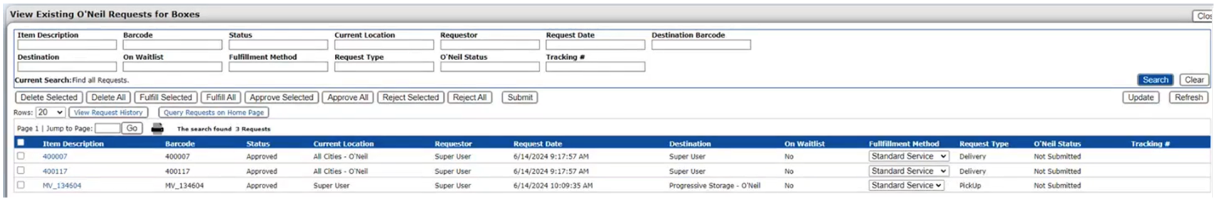
> The O’Neil Bridge connector is only supported in Gimmal Physical 3.15.1 and above.

Features

Manage and Review O’Neil Requests

There is an O’Neil Requests page to manage requests for items going to or coming from an O’Neil affiliated Record Center. Click the ‘O’Neil Box Requests’ link to open the View O’Neil Requests page.

The View O’Neil Request page enables the submission of requests directly to the O’Neil Bridge API.



The top portion of the screen can be used to query requests with the ‘Current Search’ showing the applicable query in effect.

There are several buttons which allow the user to take action:

- **Delete Selected** - permanently removes the requests selected in the lists and request table
- **Delete All** - permanently removes all the listed requests and removes them from the request table
- **Fulfill Selected** - Transfers the selected items after they have been submitted and the O’Neil Status has been updated to ‘Fulfilled’.
- **Fulfill All** - Transfers the all applicable items listed on all pages. Items must first have been submitted and the O’Neil Status has been updated to ‘Fulfilled’.
- **Approve Selected** - Approve the request for the selected items.
- **Approve All** - Approve the request for the all items on all pages of the list.

- **Reject Selected** - Reject the transfer request for the selected items which changes the status to 'Rejected', but does not remove them from the list. At a certain point (which is set up in the P
- **Reject All** - Reject the transfer request for the all items on all pages of the list which changes the status to 'Rejected', but does not remove them from the list.
- **Submit**: Submits all Approved items to O'Neil Bridge for pickup or delivery.

Note:

- Items must be '**Approved**' before they can be submitted
- Depending on the setting in the O'Neil Integration configuration screen, users have a choice to transfer the item within Gimmal Physical immediately after the 'Submit' button is clicked or wait until a further time to transfer the items within Gimmal Physical using the Fulfill buttons.

O'Neil Status Notes

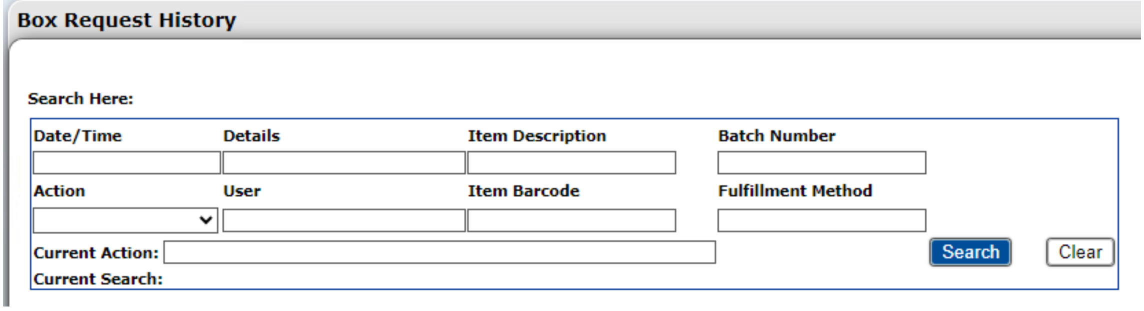
The connector updates the O'Neil status once the Manage Request page is refreshed. These are the status fields:

- **Pending**: Gimmal Physical has initiated the order and updated the box fields for Off-Site Vendor and GUID if it is a new box.
- **Submitted**: O'Neil has acknowledged the order and Gimmal Physical can show the tracking number for the request.
- **Work Order**: O'Neil has begun processing the request
- **Fulfilled**: Depending on the setting in the O'Neil Configuration
  - Transfer Automatically:
    - Pickups and Deliveries are automatically transferred within Gimmal Physical once the Fulfilled state is reached. The associated requests will disappear from the requests list once the page is refreshed.
  - Transfer Manually
    - Pickups are transferred automatically once fulfilled
    - Deliveries will only be fulfilled when:
      - The O'Neil Status is Fulfilled
      - The box is transferred by:
        - The normal method for transferring boxes (transfer page, scanner, etc.)
        - An approver using the 'Fulfill Selected' or Fulfill All' buttons

There are several available page options:

- The number of rows shown on the page can be adjusted using the 'Rows' Dropdown.
  - 50 is the maximum value

- *View Request History* will open the ‘Box Request History’ page which allows users to locate the request history by querying a variety of options:



- *Query requests to the Home Page Grid* will collect all items from the current query and move them to the Home Page Grid. This view has additional values, actions, and queries available for management of the items.

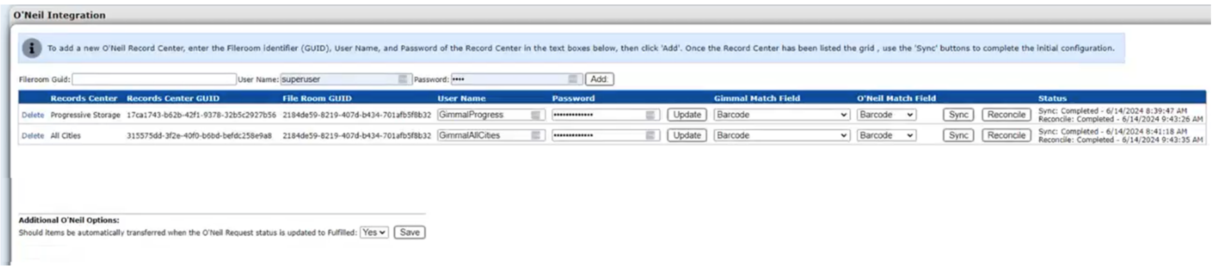
Helpful Tip

A selection for Off-Site Vendor is not needed for new boxes as long as the request destination is an O’Neil Record Center location. Having O'Neil as the choice of Off-Site Vendor for a box represents the fact that O'Neil has knowledge of and has registered the Box. New boxes don’t need this value from the O'Neil perspective ***until*** they are picked up for the first time. From within Gimmal Physical, the Off-Site Vendor selection will not be enabled until a new Box is first transferred to an O'Neil Record Center. The workflow is intended to be the following:

1. User creates a Box. At this point, the new Box will have the default *Current Location* of the User, and the default *Home Location* of O'Neil.
2. User requests pickup of the Box to be sent to O'Neil. Because the default *Home Location* is already O'Neil, no changes should be needed on the request page.
   Note: If the default home location was **not** set in the earlier step, ensure that the O'Neil location is specified as the new destination as part of the request.
3. Because the Box is being sent to O'Neil, it will appear in the O'Neil requests queue.
4. When the request is submitted from the O'Neil request queue page, it will be processed through the O'Neil integration. This step will assign *O'Neil* as the Off-Site Vendor value at the Box level and update the O’Neil matching GUID when the ‘Submitted’ status is reached.
5. From this point forward, the Off-Site Vendor value will be set to O'Neil for that Box. Any subsequent requests for that box will go directly through the O'Neil queue.

Settings

The configuration settings for O'Neil can be found on the O'Neil Integration page accessed via the Integration section on the Administration page. This is reached by clicking the ‘Admin’ option on the navigation bar.



Initial Setup

Multiple Off-Site Record Centers are supported by both O'Neil and Gimmal Physical. Communication is handled on the Record Center level.

Adding a New Record Center

To enter a new Record Center, the end user must have the following information:

1. Fileroom GUID
2. Record Center Username
3. Record Center Password

Clicking the 'Add' button will populate the Record Center list.

Syncing Records

Once the Record Center has been established, and box data has been entered or imported into Gimmal Physical, records can be synchronized. To synchronize, first the matching fields must be established between Gimmal and O'Neil, then click the Sync button. To see the updated status of the sync, refresh the screen. The Sync status along with the date/time of last update will show in the 'Status' column. This may take a significant length of time depending on the volume of records processed.

Reconciling Records

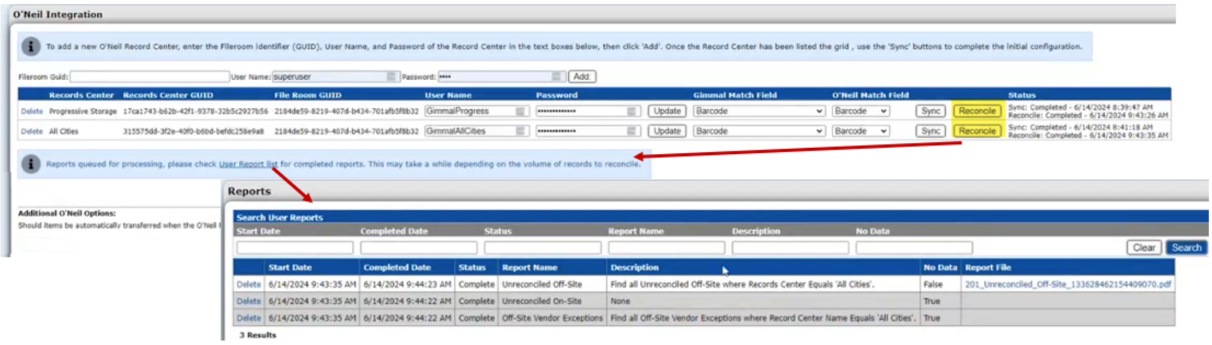
Although the automation of requests using the O'Neil Bridge connector significantly decreases errors and miscommunication between Record Centers and users of Gimmal Physical, audits of the holdings should be performed occasionally. To facilitate this, Gimmal Physical has three reports that support a reconciliation feature for O'Neil Bridge enabled Record centers.

To initiate the process, first run the reconciliation by clicking the 'Reconcile' button for a specific record center. This kicks off the process of comparing inventory in three methods, each with its own report:

- Items that O'Neil has listed but Gimmal Physical does not (UnReconcilled Off-Site report)
- Items that Gimmal has listed as an O'Neil box, but O'Neil does not (UnReconcilled On-Site report)
- Off-Site Vendor Exceptions report:
  - Items that O'Neil has listed as customer boxes, but Gimmal Physical does not have the box in its system
  - Items that Gimmal Physical lists as a Record Center box, but O'Neil does not have a record of it

This job may take a significant amount of time, the screen can be refreshed to see the updated status, or, you may want to run it overnight.

Once the job has been completed, click the link for ‘User Reports' to navigate to the Reports page where the three available reports will be at the top of the screen.



To access the reports based on the information from the last ‘Reconcile' run, find the Reports view via the navigation menu at the top of the application and scroll to the appropriate section.

Configuration Notes

- A location record must:
  - be designated as an O'Neil location by choosing O'Neil as the Off-Site Vendor.
  - have a default fulfillment method chosen.
- Transit Information will also need to be entered for any User that will be either requesting pickup or delivery to or from O'Neil Record Centers.
- Box records will need to have a current location and a Record Center value
- For request pickups, the destination will need to be set to an O'Neil location.
- A location record must be designated as an O'Neil location by selecting O'Neil as the value for the Off-Site vendor for a given record. Multiple O'Neil locations are supported.
- Transit Information will also need to be entered for any location that is an O'Neil location.

(Legacy Help) User Guide for Laserfiche Integration

Overview

The Laserfiche Integration allows for Gimmal records of various types to be linked with Laserfiche documents, making these records searchable within Laserfiche. When records are created, updated, deleted, or expunged in Gimmal, the same changes are made to the corresponding documents in Laserfiche.

Configuring the Laserfiche Integration

The Laserfiche CMIS Gateway must be installed and correctly configured for the Laserfiche

Integration to work. Please see documentation from Laserfiche for completing this step. Once the CMIS Gateway is in place, configure the following settings on the Application Settings page in Gimmal:

- *Laserfiche CMIS Gateway URL* – The service URL of the CMIS Gateway browser binding service (e.g. https://example.domain/lfcmis/browser).
- *Laserfiche Repository* – The name of the Laserfiche repository.
- *Laserfiche Username* – The username of the dedicated account that Gimmal will use to connect to Laserfiche. At minimum, this account should possess sufficient rights to create, update, move, and delete documents.
- *Laserfiche Password* – The password of the dedicated account that Gimmal will use to connect to Laserfiche.

To finish configuring the Laserfiche integration, go to the **Admin** menu and select **Laserfiche Integration**.

Access to this page is governed by role permissions, so the **Configure Laserfiche Integration** right must be granted to the role of the user doing the configuration.

On the **Laserfiche Integration** page, select a **Gimmal tab** and a **Laserfiche template**, and click the **Link** button on the right to link the tab with the template.

Each tab may only be linked with one template, but multiple tabs may be linked to the same template.

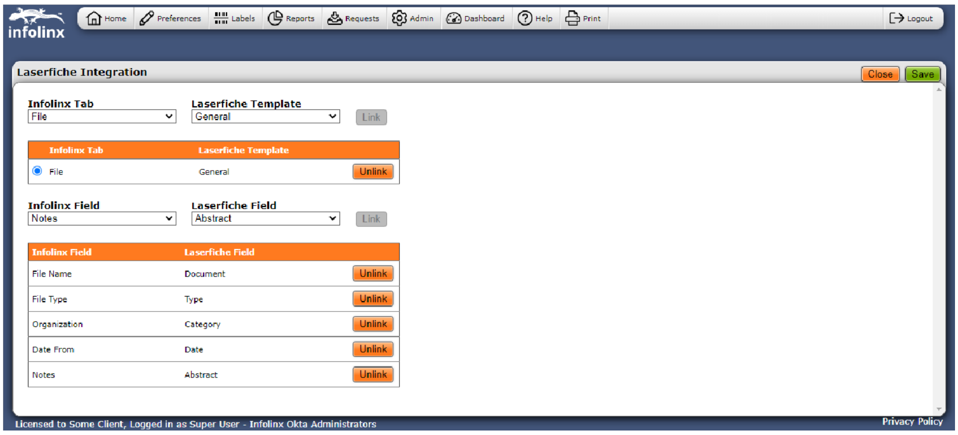
To unlink a Gimmal tab from a Laserfiche template, click the **Unlink** button for the tab's row in the linked tabs grid.

To link the fields of a Gimmal tab with the fields of a Laserfiche template, first select the tab in the linked tabs grid. Below, select a Gimmal field and a Laserfiche field, and click the **Link** button on the right to link the fields.

Each Gimmal field may only be linked with one Laserfiche field and vice versa. To unlink a Gimmal field from a Laserfiche field, click the **Unlink** button for the field's row in the linked fields grid.

When the configuration is complete, click the **Save** button in the top right corner to save changes.

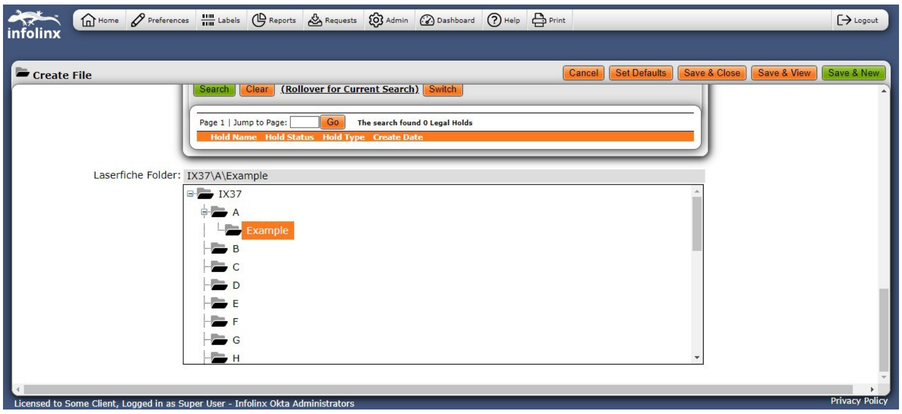
Alternatively, click the close button at any time to discard changes and return to the Admin menu.



To create a record that is linked to Laserfiche, go to the **Create** page, enter data for the record, select a **Laserfiche folder** at the bottom of the page, and save the record.

If a folder is selected, creating a Gimmal record will create a corresponding document in Laserfiche according to the settings configured on the Laserfiche integration page.

The Laserfiche document will be named with the tab and barcode of the Gimmal record (e.g. File – 0000000200) and placed in the folder that was selected on the **Create** page. Note that Laserfiche documents will not be added for Gimmal records that are created without a Laserfiche folder.



Updating Records Linked to Laserfiche

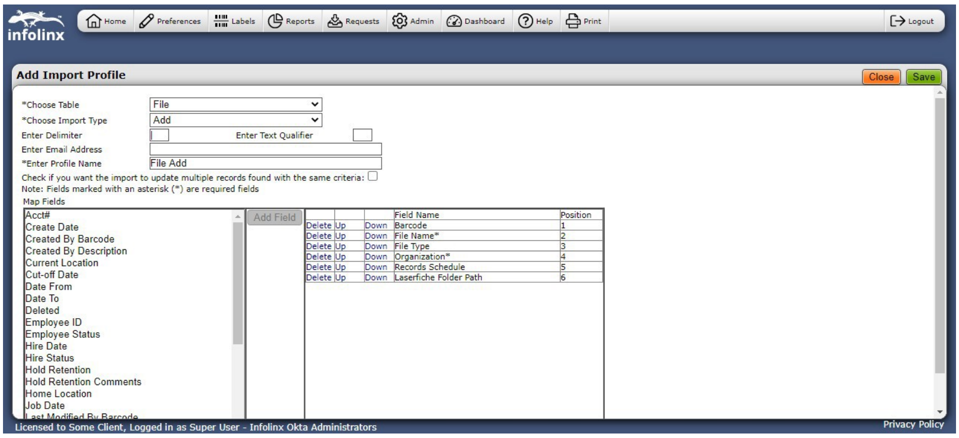
Updating the metadata of a Gimmal record will update the metadata of the corresponding document in Laserfiche according to the settings configured on the Laserfiche Integration page. If the Laserfiche folder is changed, the corresponding document will be moved to the new folder in Laserfiche. Assigning a Laserfiche folder to a Gimmal record will also create a corresponding document in Laserfiche if the record was not previously assigned a folder.

Deleting Records Linked to Laserfiche

Deleting or expunging a Gimmal record that is linked to a Laserfiche document will unlink the record and transfer the document to the Recycling Bin in Laserfiche. However, undeleting a Gimmal record that was previously linked to Laserfiche will not restore the link or move the corresponding Laserfiche document back to its original folder location.

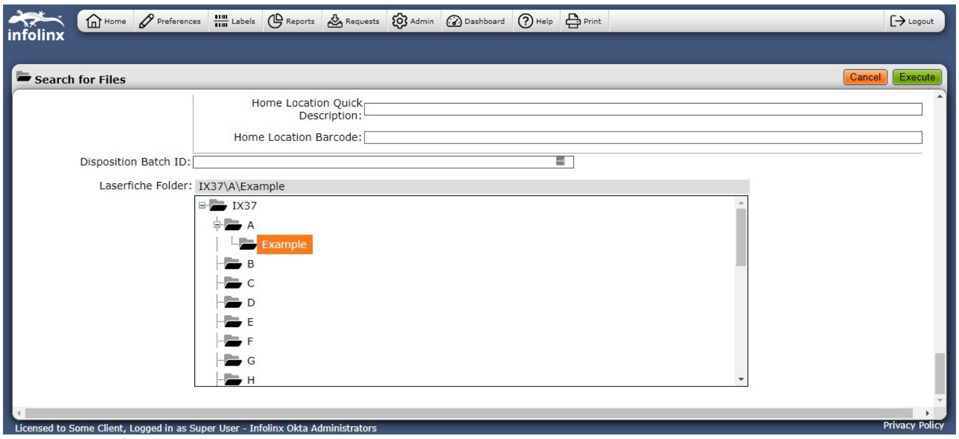
Importing Records Linked to Laserfiche

To import Gimmal records that are linked to Laserfiche, create an import profile for the linked tab, and select Laserfiche Folder Path as one of the fields. In the import data file, place the full path of the Laserfiche folder in which the documents will be created (e.g. IX37\A\Example) in the position of the Laserfiche Folder Path field. Then, execute the import.



Searching by Laserfiche Folder

To search for Gimmal records linked to documents in a certain Laserfiche folder, go to the Detailed Search page and select the Laserfiche folder in addition to any other search criteria, then click the Execute button in the top right corner to execute the search.



4.6.1.4.2.8 (Legacy Help) Modules

Gimmal Physical offers a number of modules designed to expand the flexibility of the application for specialized needs.

- (Legacy Help) Space Management User Guide (see page 470)
- (Legacy Help) Billing Module User Guide (see page 475)

(Legacy Help) Space Management User Guide

Contents

Configure Space Management

To configure space management, data needs to be entered on the Location, Shelf, and Box tabs within the Gimmal Physical system. There are key fields on each of these tabs that need to be set for the Space Management module to function correctly.

1. **Application Settings** – A parameter is available that allows Space Management to be calculated on either home or current location.
2. **Locations** – The “Space Management” checkbox must be selected for at least one of the Location records.
3. **Shelves** – The “Current Location” of the Shelf record needs to be one of the Locations where the “Space Management” checkbox has been selected. A value also needs to be selected from the “Capacity” list on the Shelf record(s).
4. **Boxes** – The “Current Location” needs to be one of the Shelves in a “Space Management” Location. A value also needs to be selected from the “Box Size” list on the Boxes tab.

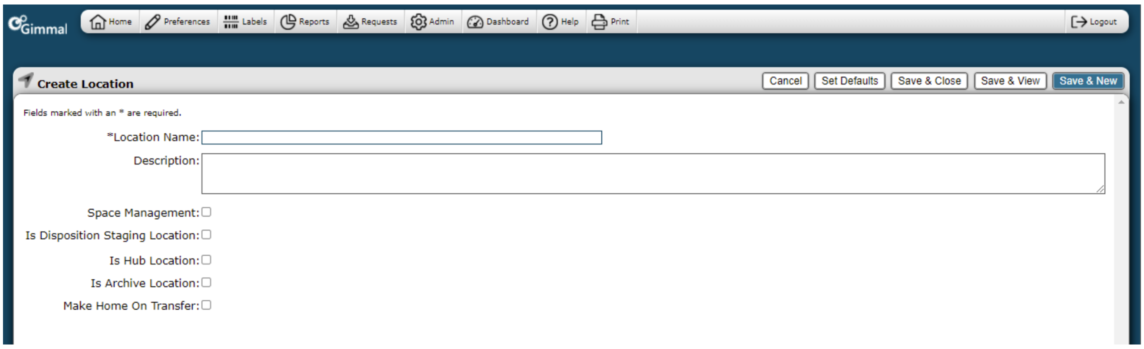
Application the Settings

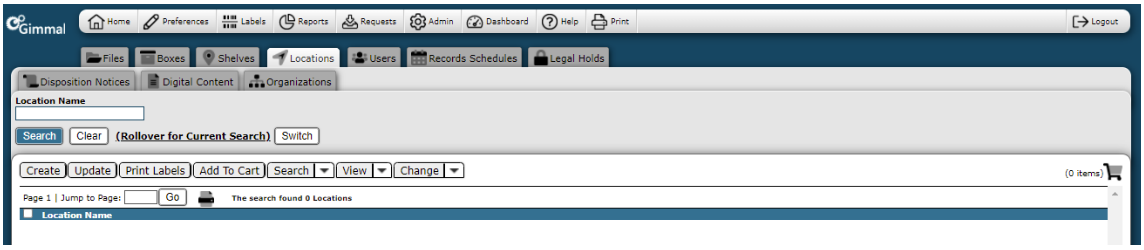
1. Click on the Admin tab.
2. Click on Application Settings.
3. Under Billing Settings | Storage charges use reserved space for billing, choose either:
    a. **Yes** - reserved space is billed if item is checked out
    b. **No** - reserved space is not billed when item is checked out
4. Under Space Management Settings | ‘Location to base space management on’, select either “Current Location” or “Home Location”.

Billing Settings	
Storage charges use reserved space for billing	No
Interval to use for Storage charges	Monthly
Use hierarchical billing for Invoice creation	No
Space Management Settings	
Location to base space management on	Current Location
Column designating locations as “Space Management”	SPACE_MANAGEMENT

Create Locations

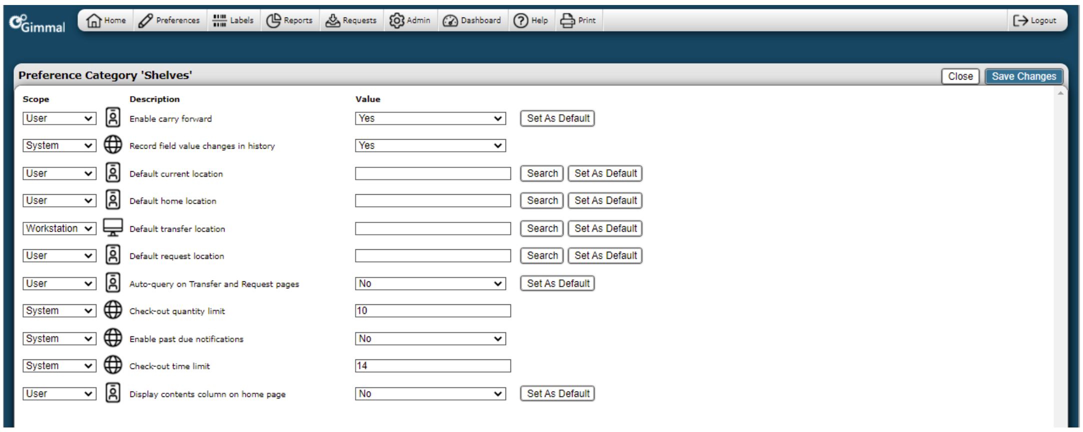
1. Click on the Locations tab.
2. Click on the Create action button.
3. Enter metadata for the Location record and check the “Space Management” checkbox.
4. Click Save & Close.

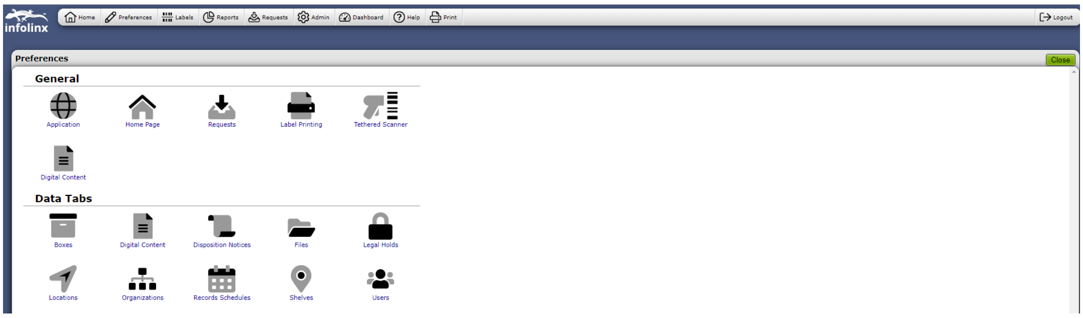




Create Shelves

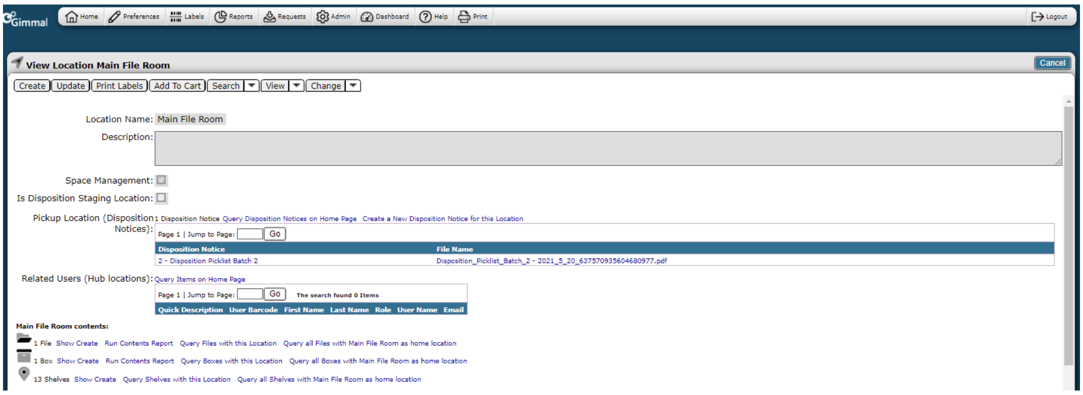
1. Import Shelf data.
2. Create Shelf data from the Shelves tab.
    a. Verify preference settings on the Preference page for the Shelves category. The “Default current location” and the “Default home location” should be set to the barcode of a “Space Management” Location.





b. Click on the Shelves tab.
c. Click on the Create action button.
d. Enter metadata for the Shelf record, being sure to select a “Capacity” value.
e. Save the Shelf record.
f. Verify the Shelf record was created in the “Space Management” Location.

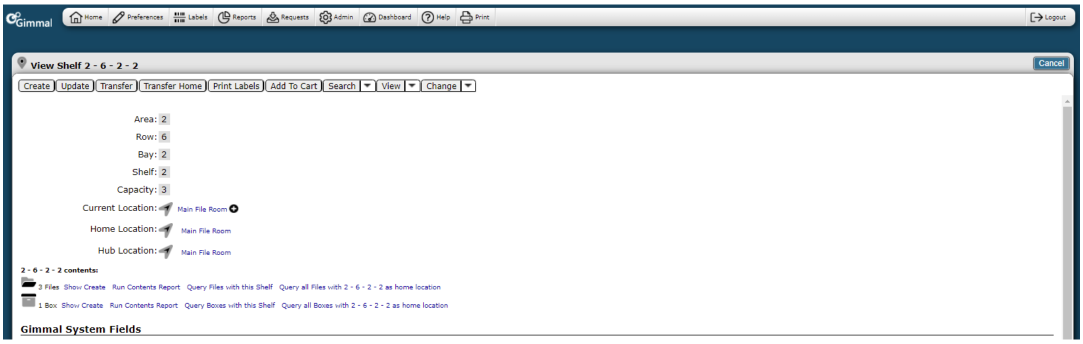
3. Create Shelf data from the View Location page.
   a. Go to the View page for the Location where the Shelves will be placed.
   b. Click on the Create link next to the Shelf icon near the bottom of the page.



c. Enter metadata for the Shelf record, being sure to select a “Capacity” value.
d. Save the Shelf record.

Create Boxes

1. Import Box data.
2. Create Box data from the Shelf view page.
   a. Go to the View page for the Shelf where the Boxes will be placed.
   b. Click on the Create link next to the Box icon near the bottom of the page.



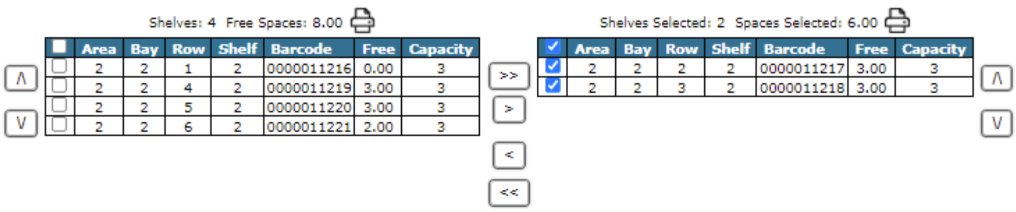
c. Enter metadata for the Box record, being sure to select a “Box Size” value.
d. Save the Box record.

View the Space Management Page

1. Click **Admin** on the top navigation Menu.
2. Under the Data section, click **Space Management**.
3. If more than one Location is used in Space Management, select the desired Location from the list.

Searching from the Space Management Page

1. Data can be entered into the various search fields and queried by clicking on the Go button.
2. Database operators (<, >, <=, >=) can be used to query the data. Additionally, a sort order can be applied to the query by arranging the fields in the Sort Priority list box.
3. Records returned by a search are presented in grid format on the left side of the page. From here, individual records or all results can be selected and moved to the grid on the right side of the page.
4. The grids display the capacity and the free space available for each Shelf record.
5. Negative values in the “Free” column show Shelf records that are in error (i.e. more items are listed on the Shelf than it can contain).
6. Grid data can be used to print a report of the selected spaces by clicking on the printer icon above either grid.



Gimmal Space Management

Shelf Description	Shelf Barcode	Free	Capacity
2-1-2-2	0000011216	0.00	3
2-2-2-2	0000011217	3.00	3
2-3-2-2	0000011218	3.00	3
2-4-2-2	0000011219	3.00	3
2-5-2-2	0000011220	3.00	3
2-6-2-2	0000011221	2.00	3
		Total Free: 14.00	Total Capacity: 18

A shelf must be expunged to be removed from Space Management

(Legacy Help) Billing Module User Guide

Gimmal Physical contains a number of features supporting billing activities for storage and other activities.

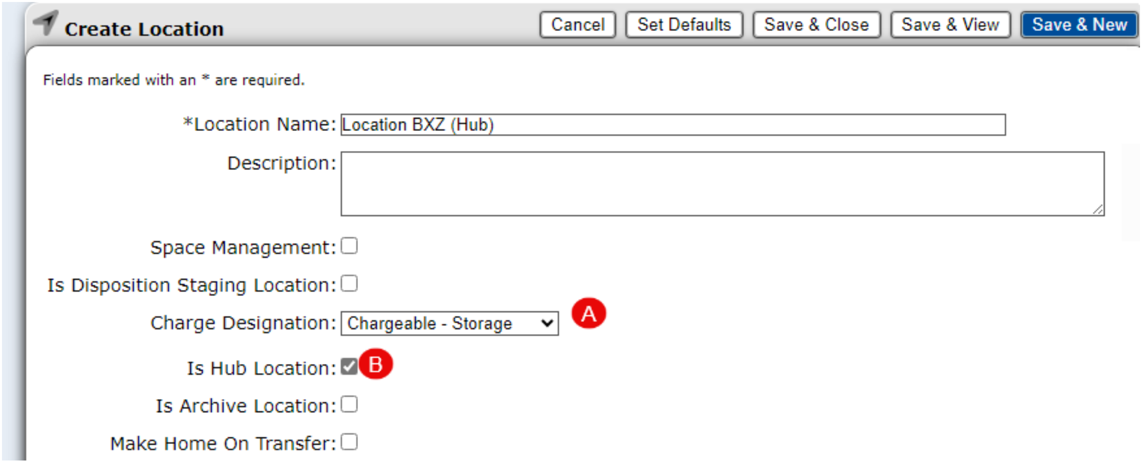
Contents

Configure Billing

Storage Costs

To configure billing for storage cost, information needs to be entered on several different tabs in Gimmal Physical.

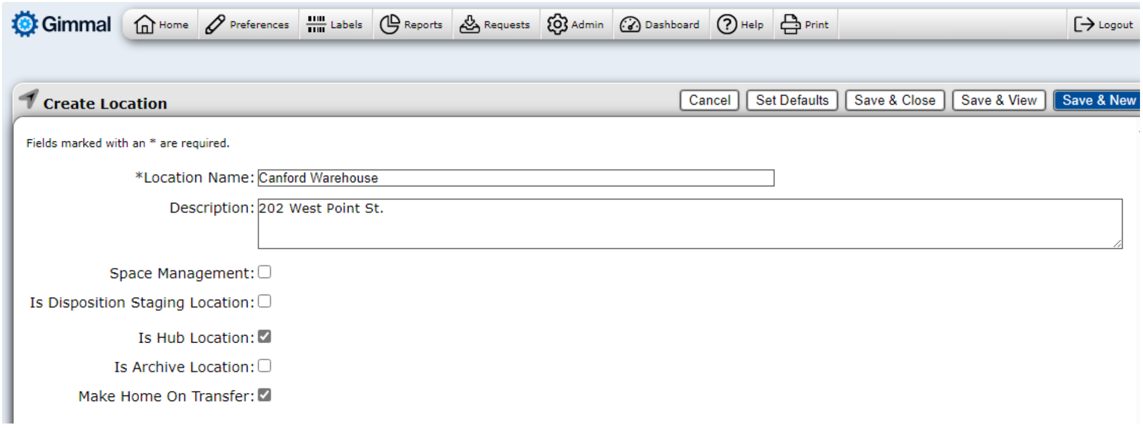
1. **Locations** – Two key values need to be set to identify a location where costs can accrue for storage.



   a. The “Charge Designation” list will need to be set to a value of “Chargeable – Storage.”
   b. The “Hub Location” checkbox must be enabled for any Location where costs will accrue for Box storage.
      When these properties are set, an item transferred to one of these Locations (or to a Shelf in one of these Locations) will have its “Accession” field set to true and its “Accession Date” field updated to the current date. An item is only accessioned once.
2. **Shelves** – The “Current Location” of Shelf records needs to be one of the hub locations designated with a ‘Chargeable - Storage’ as noted above. When these properties are set, an item transferred to one of these Shelves will have its “Accession” field set to true and its “Accession Date” field updated to the current date. An item is only accessioned once.
3. **Boxes** – If the “Current Location” of a Box is either a Shelf or a Location as designated above for any time during the billing period, storage costs will accrue. Additionally, setting the “Box Size” for Box records will allow for different amounts to be charged based on the size of the Box.

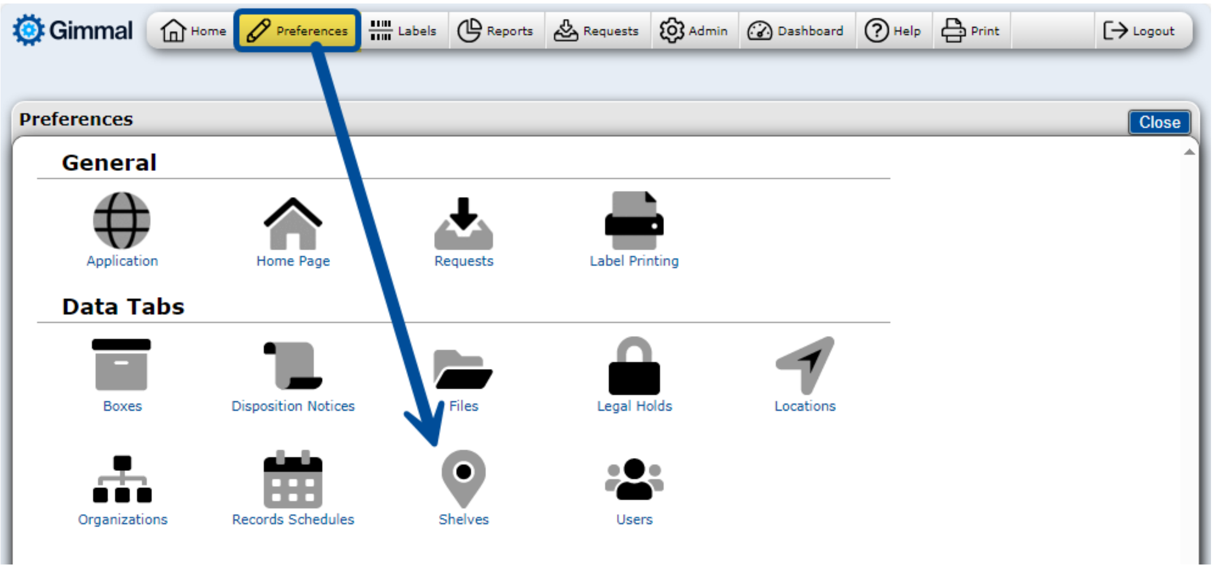
Create Locations

1. Click on the Locations tab.
2. Click on the Create action button.
3. Enter metadata for the Location,
   a. Be sure to check the “Is Hub Location” checkbox.
   b. Select “Chargeable – Storage” from the “Charge Designation” list. (Note: Not shown in screenshot below)
4. Click Save & Close.

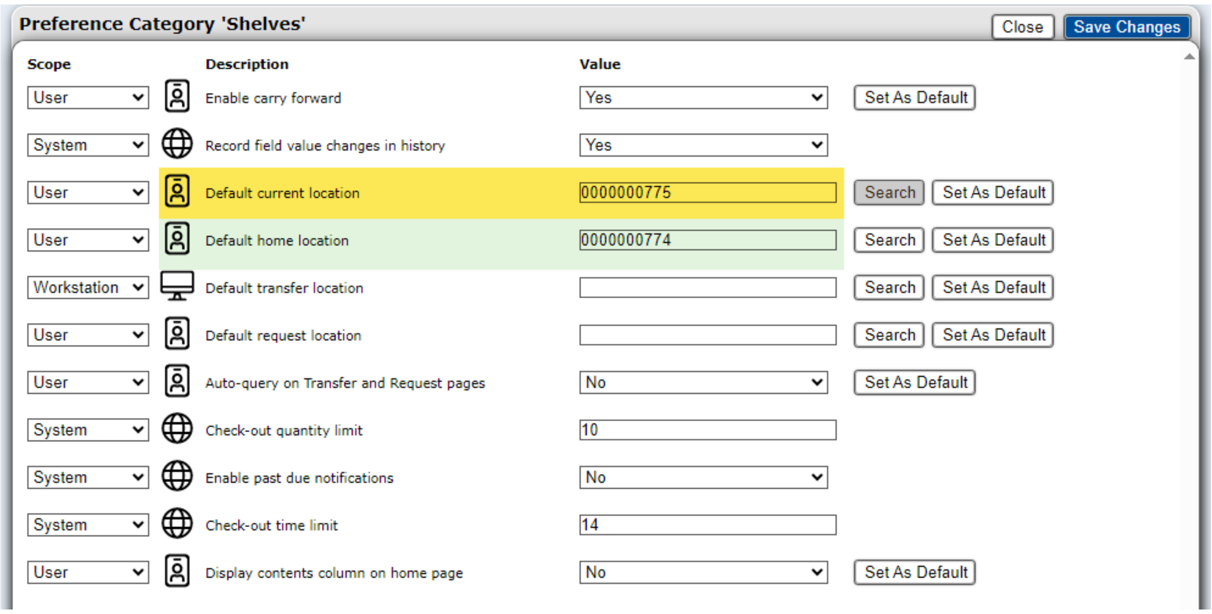


Create Shelves

There are a number of methods for creating shelves. Before doing so, first verify the Preference settings in the Shelves category on the Preferences page.



The “Default current location” and the “Default home location” should be set to the barcode of a Hub Location that has been designated as a “Chargeable – Storage” Location.

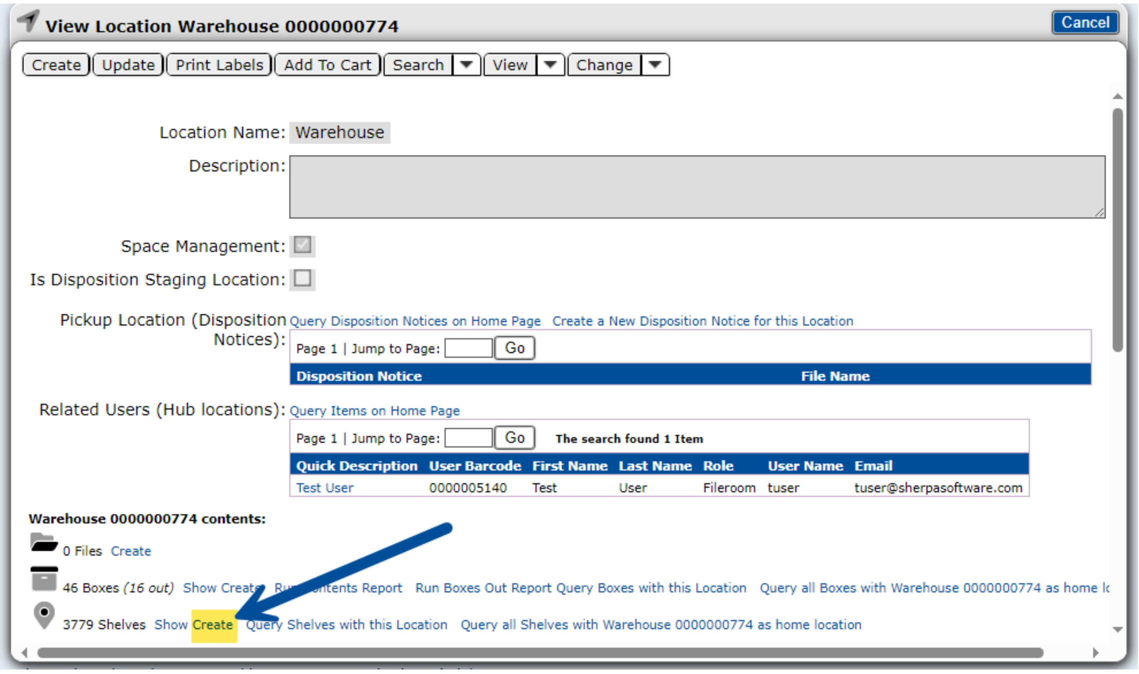


Create the Shelf from the Shelf tab

1. Click on the Shelves tab from the Home Page.
2. Click on the Create action button.
3. Enter metadata for the Shelf record, being sure to select “Chargeable Storage” from the “Charge Designation” list.
4. Save the Shelf record.
5. Verify the Shelf record was created in the specified Location.

Create Shelf data from the View Location page

1. Go to the View page for the Location where the Shelves will be placed.
2. Click on the *Create* link next to the Shelf icon near the bottom of the View Location page.



3. Enter metadata for the Shelf record, being sure to select “Chargeable Storage” from the “Charge Designation” list.
4. Save the Shelf record.

Create Shelf via Import

Please view the Import Guide (see page 368) for more information on importing data via a file import.

Create Boxes

There are a number of methods for creating boxes.

Create Box from Box tab

Please see guide to Creating & Updating Records (see page 362), Bulk Creation (see page 366) or Bulk Update for more information.

Create Box data from the Shelf view page.

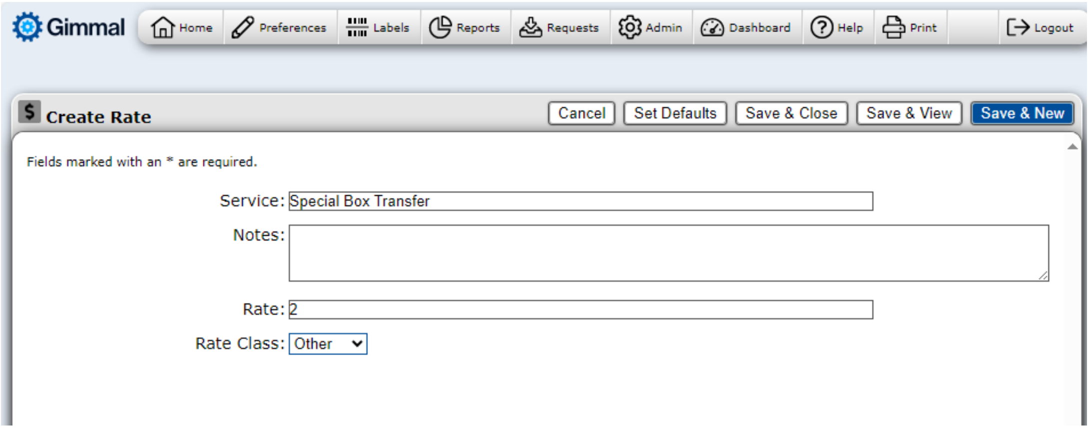
1. Go to the View page for the Shelf where the Boxes will be placed.
2. Click on the Create link next to the Box icon near the bottom of the page.
3. Enter metadata for the Box record, being sure to select a “Box Size” value.
4. Save the Box record.

Create Boxes via Import

Please view the Import Guide (see page 368) for more information on importing data via a file import.

Create Rates

Before billing can commence, Rates need to be created for associating with billing events.
Note: Rates can be created from the Create Billing Events screen, if needed.

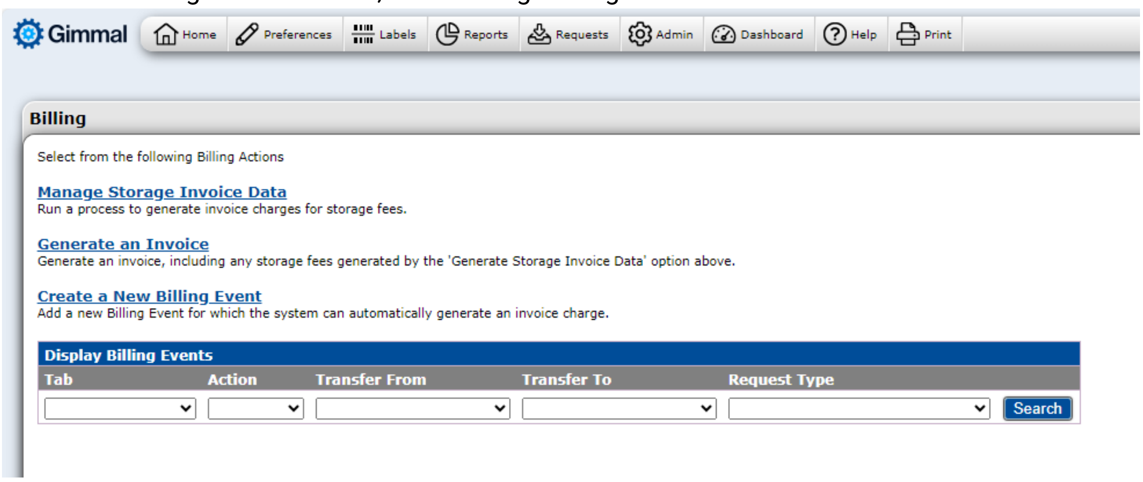


1. Select the Rates tab
2. Click the Create action button.
3. Enter data for the available fields.
4. Click on any of the available Save action buttons to save the Rate.

Billing Management

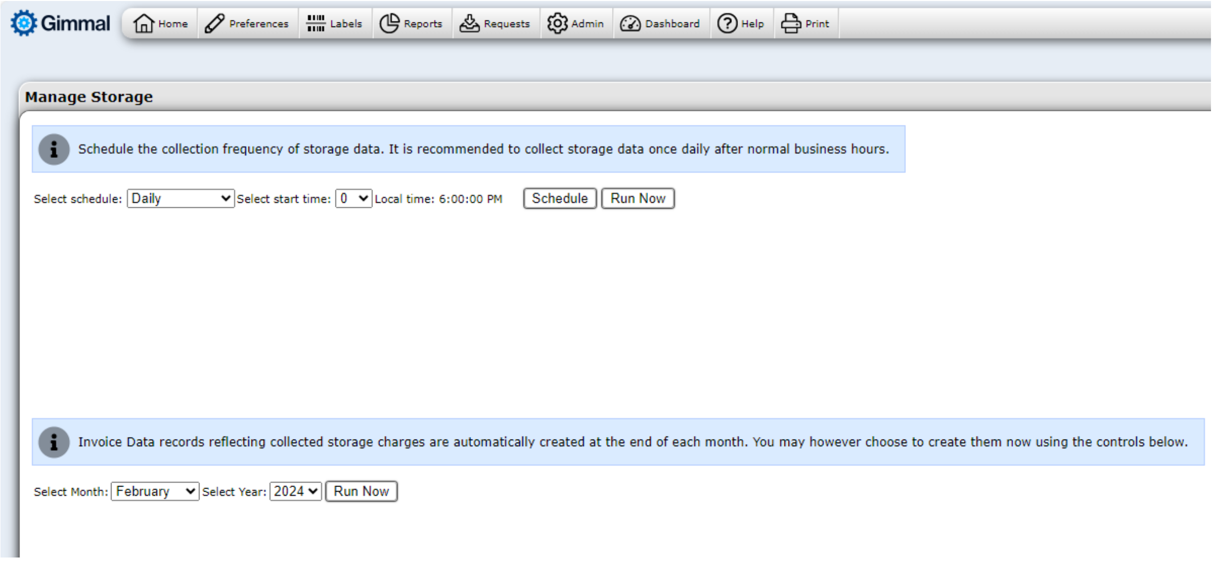
To manage the various steps in the billing process, navigate to the Billing screen:

1. Click "Admin" in the top navigation menu.
2. Under the Configuration section, click "Billing Management."



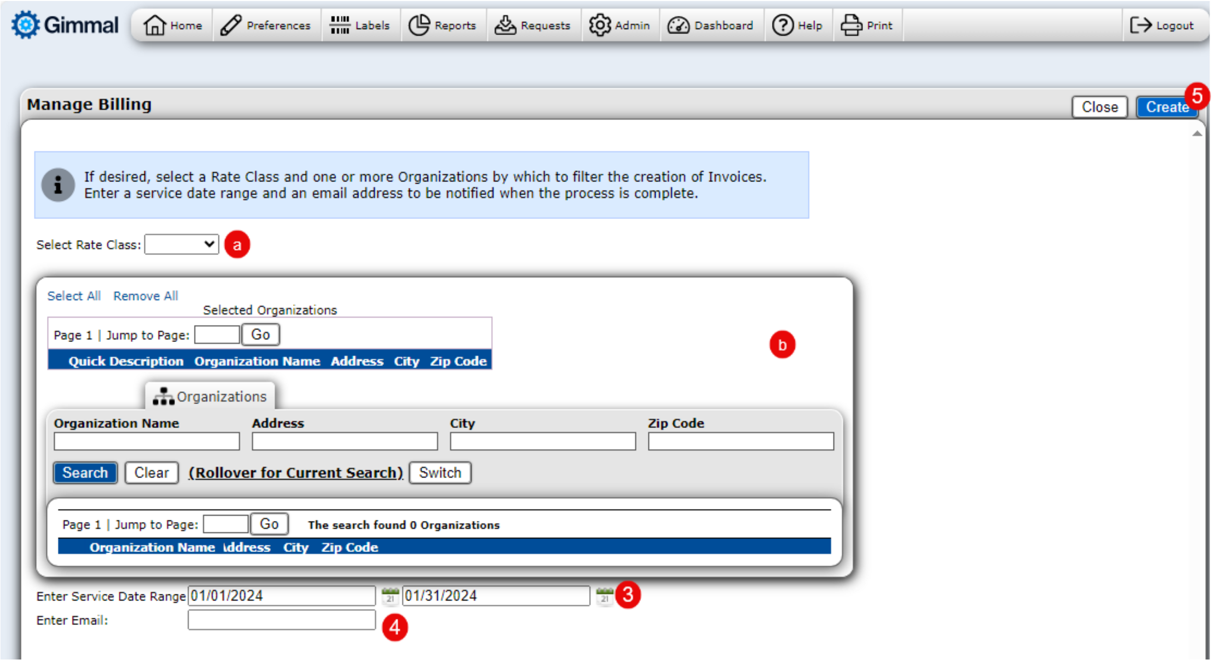
Manage Storage Invoice Data

Set the options for collection frequency with 'Run Now' options for generating ad hoc invoice data records.



1. By default, storage charges are collected daily. This option can be changed, or a job can be run ad hoc:
    a. To change the schedule for the nightly job:
        i. Choose the preferred option from the 'Select Schedule' drop down list.
        ii. Choose the preferred start time.
        iii. Click 'Schedule'. This will set the new option.
    b. To run as a one time, ad hoc collection job, click the 'Run Now' button. This will schedule the background job to run at the next available time.
2. Invoice data records are automatically created at the end of the month. However, there may be reasons to create them ad hoc. To do so:
    a. Select the month and year of the invoice data records you'd like to create.
    b. Click 'Run Now' to schedule the job to start at the next available time.

Generating Invoices

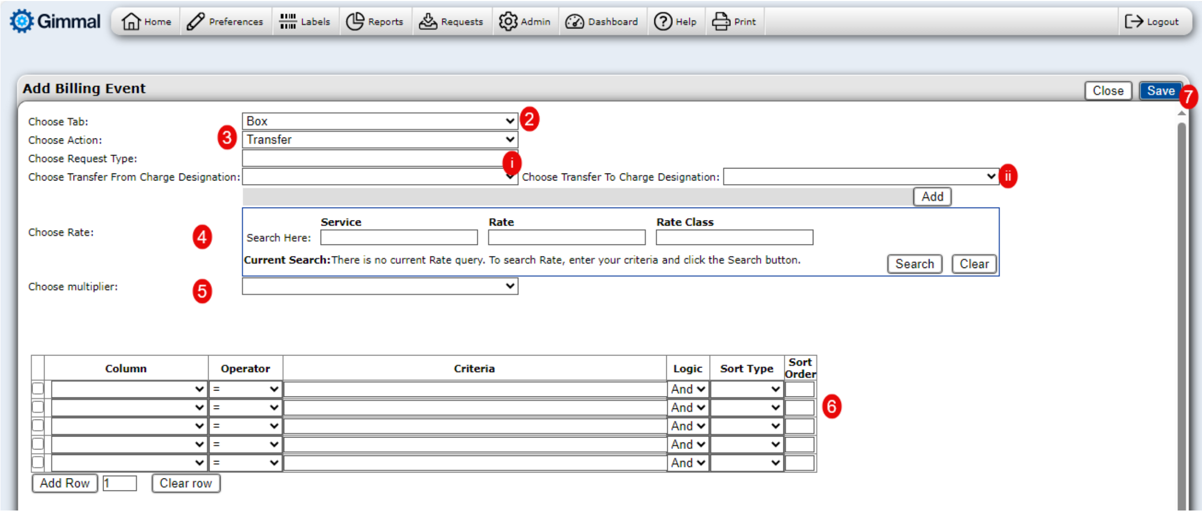


Before generating invoices, billing events need to be created and associated with actions, and at least one invoice data collection job should be run. Once the requisite data is in place, invoices can be generated.

1. Click on the “Generate an Invoice” link. This opens the invoice management screen.
2. Invoices can be filtered by Rate Class or Organization
    a. Filter by Rate Class: Choose the preferred rate class by choosing ‘Select Rate Class’ drop down.
    b. Filter by Organization: Use the search control to limit the invoice creation to one or more organizations.
3. Gimmal Physical will automatically display “Service Date Range” for the month prior to today’s calendar date. The date fields can be overwritten to update to a preferred date range using the ‘Enter Service Date Range’ fields.
4. Enter an email address if you’d like a notification when the invoice creation process has completed.
5. Click the Create button. This will kick off the process.
6. Records will be created on the **Invoice Data** tab. Invoices will also be generated and displayed on the **Invoices** tab.

Create Billing Events

Billing Events are used to associate chargeable actions to established rates. Please note, fields shown on this page will depend on the selected options.



1. Click on the “Create a New Billing Event” link from the Billing Management screen.
2. Select the tab for this billing event by choosing an available option from the ‘Choose Tab’ drop down list.
3. Select the action for this billing event by choosing an available action from the ‘Choose Action’ drop down. Actions include:
   a. **Accession** occurs when an item is transferred to a hub location for the first time.
   b. **Create** occurs when an item is created in the system.
   c. **Delete** occurs when an item is deleted from the system.
   d. **Delivery** occurs when items are transferred from a hub location.
   e. **Storage** is used to charge for the storage of items.
   f. **Transfer** occurs when items are moved between records with specified “Charge Designations”. There are configurable options for this action:
      i. Request Type can used as a cost factor when setting up Transfer rates. To do so, select from the ‘Choose Request Type’ drop down list.
      ii. “Transfer From” and “Transfer To” Charge Designations will also need to be set for Transfer actions.
   g. **Update** occurs when item records are updated.
4. Choose a Rate from the Rate control by using the ‘Search’. Alternately, click on the Add button to add a new Rate for this action.
5. Select a multiplier (optional). Any fields that are defined as integer fields will be displayed in this list.
6. Logic can be added using the filters to further refine which items will receive this charge (optional).
7. Click the Save button.

Once configured, when any of these billing events occur occur in the application, records will be created on the Invoice Data tab.

Display Existing Billing Events

To view billing events which have already been created, use the available filters and click ‘Search’

Billing Related Administrator Settings

Use hierarchical billing for Invoice creation

This option is only applicable for installations which are configured to have a hierarchical organization structure. By enabling this option, billing can be performed on the preferred organization level, rather than just the organization level which incurred the charge.

- Options: Yes/No

Interval to use for Storage charges

Option to determine at what interval the storage charges will be collected. For more fine tuned billing and reporting, the Daily option can be used. For billing entire month for any part of the month, choose ‘Monthly’. ‘Monthly’ is the default.

- Options: Daily/Monthly

Storage charges use reserved space for billing

By selecting ‘Yes’, storage charges continue to accrue even when an item is checked-out. This essentially reserves the space for the eventual return of the item. The default is ‘No'.

4.6.1.5 (Legacy Help) Technical Guides

Please use the tree view on the left or links below choose the appropriate article of interest.

- (Legacy Help) Security Model Overview (see page 484)
- (Legacy Help) Technical Specifications – Cloud (see page 489)
- (Legacy Help) Technical Specifications – On-Premises (see page 493)
- (Legacy Help) Gimmal Physical REST Services Technical Guide (see page 498)
- (Legacy Help) Creating Resource Language Files (see page 556)
- (Legacy Help) Technical Specifications - Iron Mountain Connector (see page 558)

4.6.1.5.1 (Legacy Help) Security Model Overview

This topic has an interactive tutorial. To view this tutorial, click here[107].

107. https://gimmal.navattic.com/1u20k7y

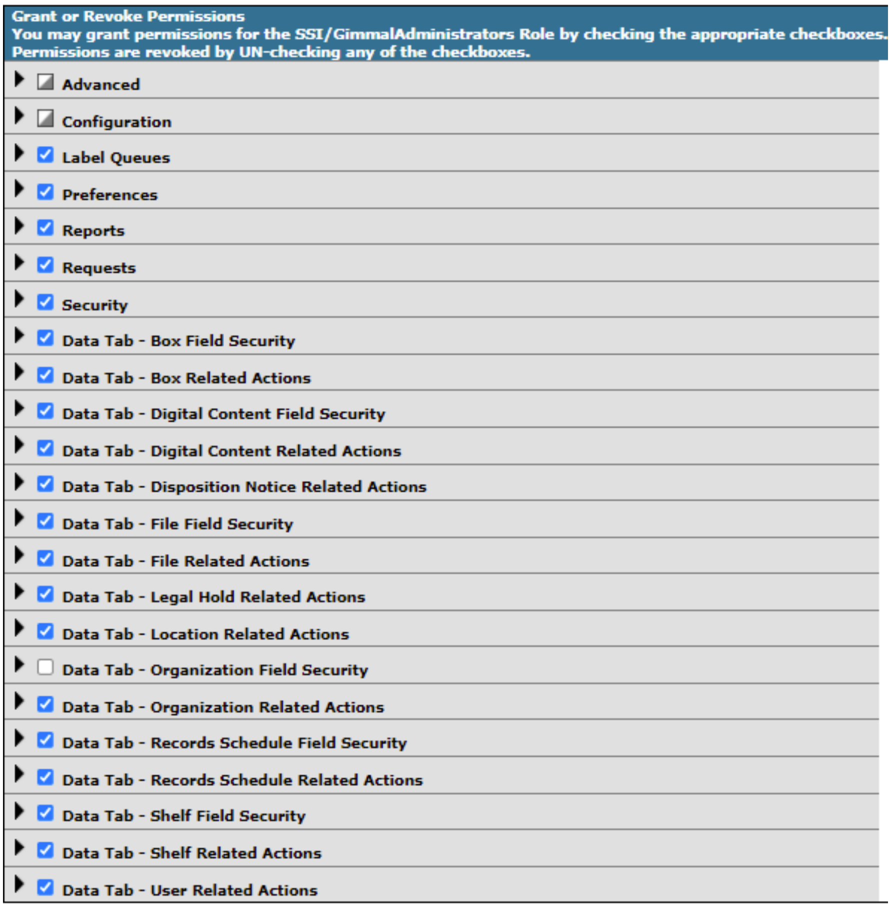
4.6.1.5.1.1 Contents

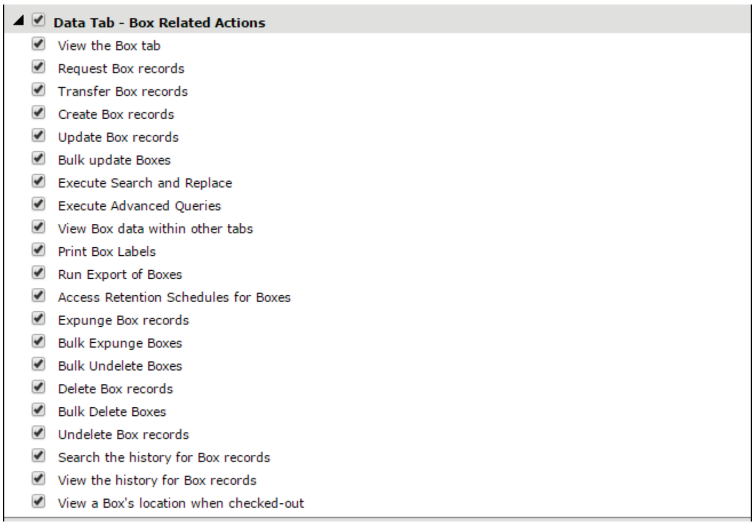
4.6.1.5.1.2 Overview

Gimmal Physical security primarily implements a role-based model supporting either forms or single-sign-on for authentication like that found within Windows Active Directory or Active Directory Federated Services. An unlimited number of roles are supported.

The model itself consists of two halves, the first restricting data access, and the second is application functionality.

Security roles and their associated privileges are managed from within the Gimmal Physical module, sample screenshots of which are shown below.





4.6.1.5.1.3 Authentication

The Gimmal Physical application may be accessed via either Forms or Single Sign On. Configuration of the authentication mode is managed within the application's corresponding web.config file.

When under Forms authentication, all security credentials are managed within the Gimmal Physical application itself, including Username and Password. Gimmal Physical supports the standard suite of password complexity rules including password length, types of characters required, lifespan, and number of failures until lockout.

When running on-premises against Active Directory (using Integrated Windows Authentication), each time a Gimmal Physical user attempts to access the Gimmal Physical application via the client-specific url, their network domain-specific User ID is used to query Active Directory to determine which, if any, Gimmal Physical -specific domain groups they belong to.

Gimmal Physical makes this determination based upon a textual comparison of Gimmal Physical roles defined within the Gimmal Physical application compared to role names defined with the network domain (e.g. 'Gimmal -administrator' or 'Gimmal Physical -Records Officer'). Outcomes include:

1. If no Gimmal Physical specific domain group memberships are identified, the user is denied access to the application.
2. If a Gimmal Physical specific domain group membership is identified, Gimmal Physical checks for the existence of an internal Gimmal Physical user record.
    a. If one is found, Gimmal Physical updates that record with any changes found from linked Active Directory fields.
    b. If one is not found, Gimmal Physical creates the internal Gimmal Physical user record, populating it with any linked Active Directory fields.
3. If more than one Gimmal Physical specific domain group membership is identified, Gimmal Physical selects the first it finds and processes authentication via #2 above.

When using Single Sign On with a SAMLv2 Identity Provider (such as OKTA, ADFS, or AAD), Gimmal Physical will authenticate the user based on the assertion sent by the IdP. Gimmal Physical can be configured to recognize a specific claim as username information and will find/create the user record in Gimmal Physical based on that information. Gimmal Physical can also assign the user to a role and configure other metadata based on the claims sent in the assertion.

4.6.1.5.1.4 Data Security

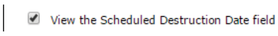
Gimmal Physical data security may be configured at table, row, or column levels.

Table Level Security

Table level security corresponds to individual data tab within Gimmal Physical, allowing or preventing access to those screens. Table level security is managed via simple checkbox driven logic within the security module as shown below. A common example is granting or denying access to the Holds tab.

Column Level Security

Column level security provides the ability to hide individual data elements. Column level security is managed via simple checkbox driven logic within the security module as shown below. A common example might be to hide the Scheduled Destruction Date for boxes or files.



Row Level Security

Row level security provides the ability to restrict users to those data records specific to them. Row level security may be implemented via Tab Filters, Secured Lists, or User-level meta-data, an example of each shown below.

Tab Filters

You may apply filters to the SSI/GimmalAdministrators Role by checking the appropriate checkboxes.
Filters are removed by UN-checking any of the checkboxes.

Tab		Name	Description
☐		Hide Deleted Boxes	Find all Boxes where (**Deleted** Not Equal To **TRUE**).
☐		Hide Deleted Digital Content	Find all Digital Content where (**Deleted** Not Equal To **TRUE**).
☐		Hide Deleted Disposition Notices	Find all Disposition Notices where (**Deleted** Not Equal To **TRUE**).
☐		Hide Deleted Files	Find all Files where (**Deleted** Not Equal To **TRUE**).
☐		Hide Deleted Legal Holds	Find all Legal Holds where (**Deleted** Not Equal To **TRUE**).
☐		Hide Deleted Locations	Find all Locations where (**Deleted** Not Equal To **TRUE**).
☐		Hide Deleted Organizations	Find all Organizations where (**Deleted** Not Equal To **TRUE**).
☐		Hide Deleted Records Schedules	Find all Records Schedules where (**Deleted** Not Equal To **TRUE**).
☐		Hide Deleted Shelves	Find all Shelves where (**Deleted** Not Equal To **TRUE**).
☐		Hide Deleted Users	Find all Users where (**Deleted** Not Equal To **TRUE**).

Modify List Security

Select Tab: Legal Hold

Checked fields are rights that have been granted for items with the specified list value.

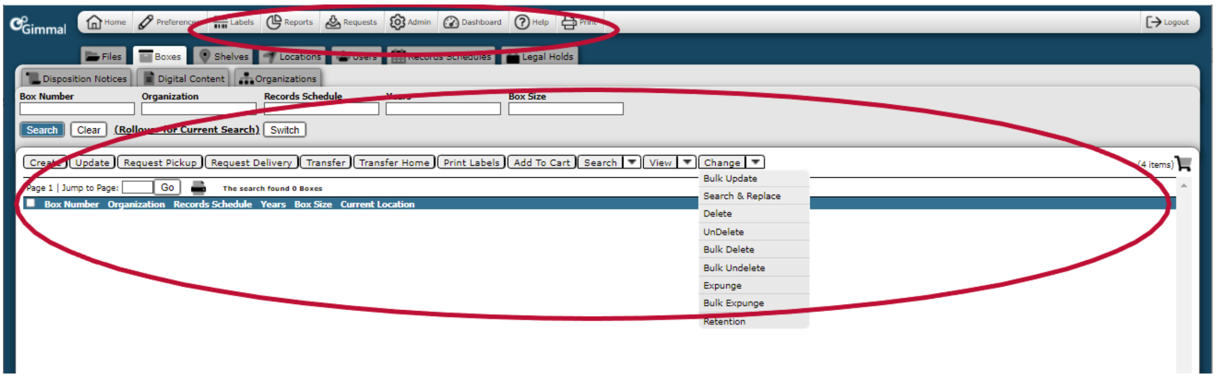
List: Hold Status

Select All Unselect All

	Bulk Delete	Bulk Expunge	Bulk Undelete	Bulk Update	Create	Data Sheet	Delete	Export	Expunge	History	Print Labels	Request	Retention	Search & Replace	Transfer	UnDelete	Update	View
Active	☐	☐	☐	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑
Inactive	☐	☐	☐	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑

4.6.1.5.1.5 Functional Security

Gimmal Physical functional security provides the ability to grant or deny access to virtually every functional capability within the software, corresponding to the application ribbon and action menus displayed below.



4.6.1.5.2 (Legacy Help) Technical Specifications – Cloud

4.6.1.5.2.1 Contents

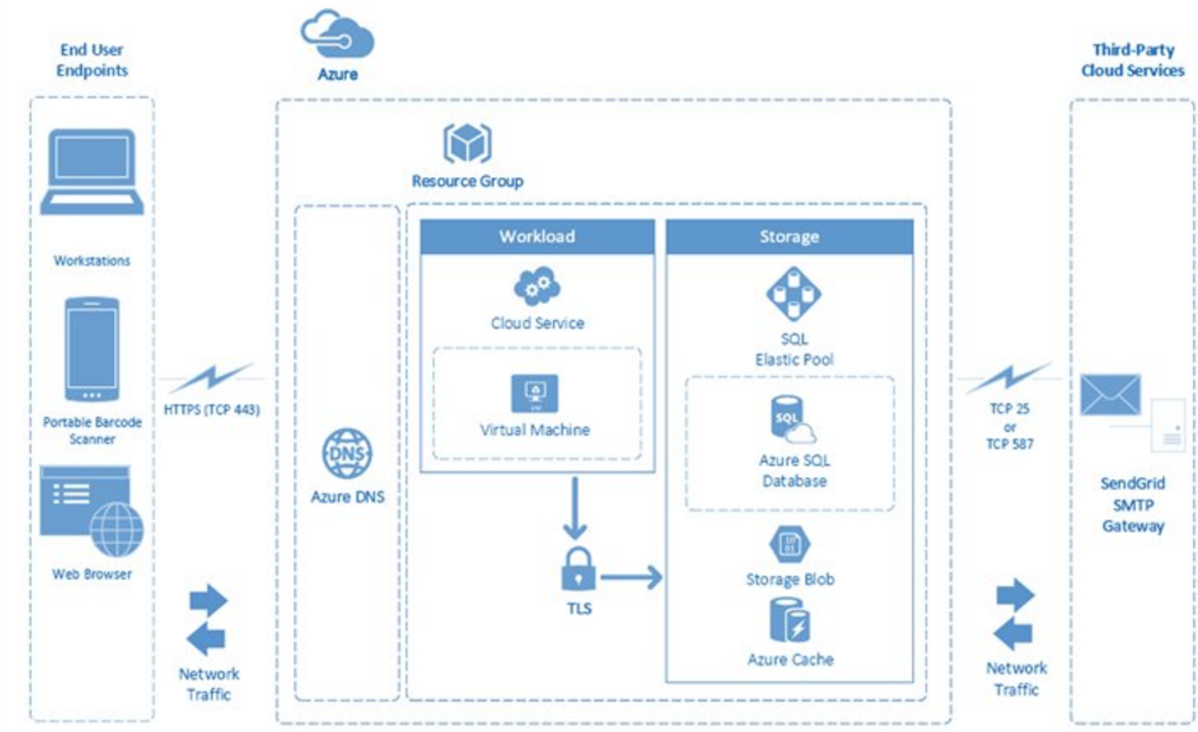
4.6.1.5.2.2 Introduction

Gimmal Physical is a web-based application that is offered as either a cloud-based or on-premises solution. The technical specifications in this document for the following sections are **specific to cloud installations**.

The Gimmal Physical web application and data will be stored on the Microsoft cloud computing platform known as Azure. Azure is a top-rated cloud provider with 99.9% uptime and is responsible for cloud security, data backup, and cloud uptime and availability. This arrangement gives you all the features provided in Gimmal combined with the security resources provided by Microsoft Azure.

4.6.1.5.2.3 Application Architecture

By architecture design, the Gimmal Physical web application and database run fully on Azure where each solution is isolated by the customer, with no multitenancy, and no shared resources other than the Azure platform.



4.6.1.5.2.4 Application Architecture Components

Gimmal Physical application architecture includes the following components.

1. Azure DNS to resolve CNAME mapping to dedicated Azure Cloud Service URL.

2. Azure Resource Group groups the following components per client.
    a. Azure Cloud Service which runs a dedicated virtual machine hosting the Gimmal Physical web application. Cloud Service connections to all other components within Azure leverage TLS for secure encrypted connection.
    b. Azure SQL Elastic Pool or Azure SQL Database, depending on the client data load, the client database will be hosted either on a dedicated SQL Elastic Pool or SQL Database.
    c. Azure Storage Blob stores all electronic files created by the Gimmal Physical web application. The Digital Content module relies on the Storage Blob to store electronic records.
    d. Azure Cache (Redis Cache) is used for session management and cache scenarios to improve performance within the Gimmal Physical web application.
3. SendGrid SMTP Gateway is used to send transactional emails from the Gimmal Physical web application. Connection to SMTP gateway can be either thru port TCP 25 (unencrypted) or port TCP 587 (encrypted via TLS).

4.6.1.5.2.5 Data Centers

Gimmal Physical utilizes the following Azure data centers: East US, Canada Central, and US Gov Virginia.

4.6.1.5.2.6 Security

Service Organization Controls Standards

Microsoft covered cloud services are audited at least annually against the SOC reporting framework by independent third-party auditors. The audit for Microsoft cloud services covers controls for data security, availability, processing integrity, and confidentiality as applicable to in-scope trust principles for each service. Microsoft has achieved SOC 1 Type 2, SOC 2 Type 2, and SOC 3 reports.

Certificates

Secure Sockets Layer (SSL) and Code Signing certificates are provided and managed by the client with assistance provided by the Gimmal System Engineer Team.

Information Protection and Encryption

- **Transport Layer Security TLS (Encryption-in-transit)**
  SQL Database secures customer data by encrypting data in motion with Transport Layer Security. SQL Server enforces encryption (SSL/TLS) at all times for all connections. This ensures all data is encrypted "in transit" between the client and the server.
- **Transparent Data Encryption (Encryption-at-rest)**

  Transparent Data Encryption (TDE) for Azure SQL Database adds a layer of security to help protect data at rest from unauthorized or offline access to raw files or backups. Common scenarios include data center theft or unsecured disposal of hardware or media such as disk drives and backup tapes. TDE encrypts the entire database using an AES encryption algorithm, which doesn’t require application developers to make any changes to existing applications.
  In Azure, all newly created SQL databases are encrypted by default and the database encryption

key is protected by a built-in server certificate. Certificate maintenance and rotation are managed by the service and require no input from the user.

Identity Management Integration and Single Sign On (SSO)

Gimmal Physical can integrate with the following Identity Management/Single Sign On (SSO) technologies:

- Okta
- Azure Active Directory (AD)
- Microsoft Active Directory Federation Services (ADFS)
- SAML2-based Identity Providers (IdP)

Vulnerability Scans

Gimmal Physical performs vulnerability scans monthly and performs a scan for every new client build.

4.6.1.5.2.7 Disaster Recovery

Gimmal provides robust backup and disaster recovery based on Microsoft Azure SQL Database, including Recovery Point Objective (RPO < 24 hours), Recovery Time Objective (RTO < 12 hours), and Point In Time Restore (PITR backup retained for 14 days).

4.6.1.5.2.8 Patch Management

System maintenance, outside of application bug fixes/patches, is provided by the Microsoft Azure platform. Patches applied to the Gimmal Physical web application are governed by the Gimmal Change Management process.

4.6.1.5.2.9 Installation Components

Component	Description	Deployment Unit
Gimmal Physical Web Access	Software to access the Gimmal Physical application.	Modern Web Browser
Gimmal ScannerConnect (optional)	A standalone application that provides an interface for the Zebra DS4608/4278 barcode scanners.	Client Workstation
Email Notifications	Software to send email messages from the Gimmal Physical application.	SendGrid

Gimmal PortableConnect (optional)	A standalone application that provides an interface for the Zebra TC5x barcode scanner. Supports Android OS versions 10, 11, 13 and 14	Client Mobile Scanner

4.6.1.5.2.10 Additional Supporting Applications

Optional Software:

- **Gimmal FileConnect** (see page 422): a Windows service that interfaces with Gimmal Physical web services to push data from network file shares or local folders to Gimmal Physical for storage. A UI is provided to configure the service.
- **Gimmal ScannerConnect** (see page 448): a standalone application that allows users to transfer items in Gimmal Physical. Used for tethered or wireless scanner devices.
- **Gimmal PortableConnect** (see page 426): An Android application that allows most Zebra TC5x barcode scanners to collect scans and perform transfers into Gimmal Physical. Supports Android 10, 11, 13 and 14.

Gimmal Physical REST API

An extensive library (see page 498)of REST-based web services is available for consumption. Please

4.6.1.5.2.11 Device Hardware

Supported Devices:

Device	Description	Specifications
Zebra TC5x (Mobile Scanner) (not including TC51 or its variants)	This scanner is often used in a warehouse, office building, or campus environment to both check in and out items, as well as reconcile the Gimmal Physical database with where items are located. Uses the Gimmal PortableConnect application to interface with Gimmal Physical.	• USB port for the dock • Android OS versions,10, 11, 13 and 14 • Gimmal PortableConnect application (see page 426)

Zebra LI4278 (Wireless Scanner)	A quick way to check in and out items using the Gimmal ScannerConnect application. Normally used at a file room check-point. The base is connected to the computer and the scanner has a limited range.	• USB port • Direct-to-Serial cable for the scanner, with a COM-to-USB adapter • Driver for the adapter; PC to recognize the scanner as a COM port connection • 80-foot range • Gimmal ScannerConnect application (see page 448)
Zebra DS4608 (Tethered Scanner)	A quick way to check in and out items within the Gimmal ScannerConnect application, normally used at a file room check-point.	• USB port • Direct-to-Serial cable for the scanner, with a COM-to-USB adapter • Driver for the adapter; PC recognizes the scanner as a COM port connection • 6ft range tethered scanner • Gimmal ScannerConnect application (see page 448)

4.6.1.5.3 (Legacy Help) Technical Specifications – On-Premises

4.6.1.5.3.1 Introduction

Gimmal Physical is a true thin application that is offered as either a cloud-based or on-premises solution. The system requirements in this article are specific to on-premises installations only.

4.6.1.5.3.2 Requirements

This document provides the list of requirements for supported operating systems, database servers, software, and hardware.

Gimmal Physical is deployed with two installation files:

- A setup file to install the application on the web server
- A backup file for the SQL Server database

Please see the Installation Guide for more details.

Application Server

Microsoft® .NET Framework 4.8 must be installed on the application server running Gimmal Physical. A supported version of Microsoft Internet Information Services (IIS) 7.0 or later must be configured and running before Gimmal Physical can be installed.

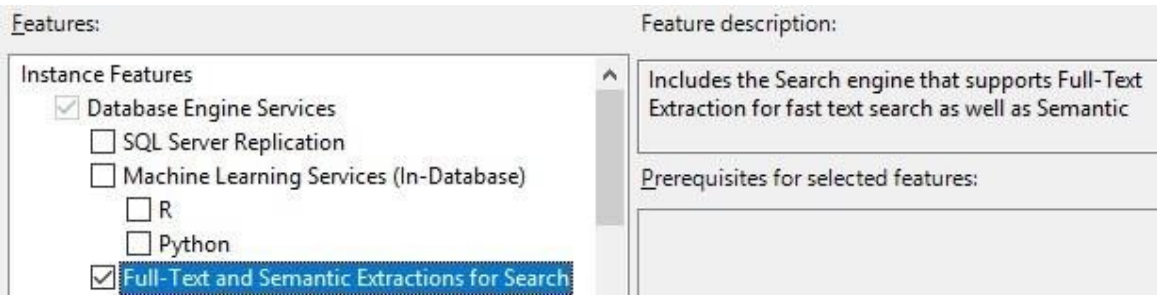
Databases Supported

Recommended: 3.13 and above should use SQL Server 2019 or above.

Supported Software	Edition	Product Version Minimum
SQL Server 2012	Standard Enterprise	Version 11.x Note: Not supported for 3.12+
SQL Server 2014	Standard Enterprise	Version 12.x Note: Not supported for 3.12+
SQL Server 2016	Standard Enterprise	Version 13.x
SQL Server 2017	Standard Enterprise	Version 14.x
SQL Server 2019	Standard Enterprise	Version 15.x
SQL Server 2022	Standard Enterprise	

Database Feature Requirements

Full-text and Semantic Extractions for Search are required



Devices (Optional)

- Zebra DS4608/4278 or any general-purpose scanner.
  - Gimmal Physical ScannerConnect (see page 448)must be installed and enabled to use tethered or wireless barcode scanner devices with Gimmal Physical.
- Zebra TC5x Mobile Computer: Gimmal Physical PortableConnect (see page 426) must be installed and enabled on the TC5x device.

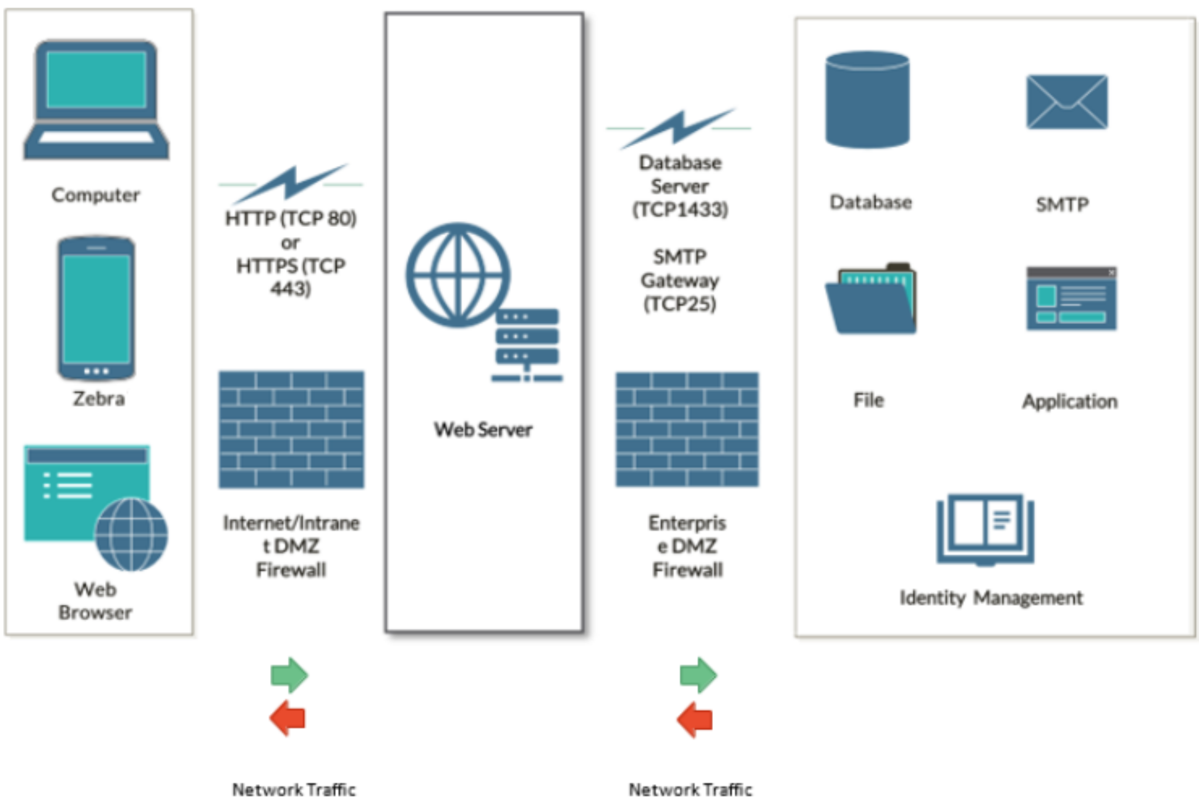
- Android OS 10 through 14 supported (except Android 12).
- TC-51 and its variants are no longer supported

SMTP Server

To use the e-mail notification feature, there must be an SMTP (Simple Mail Transport Protocol) server available to handle the actual mail requests for the organization. For example, Microsoft Exchange Server provides SMTP facilities for sending email messages, as do Sendmail, Postfix, QMail, and other products.

4.6.1.5.3.3 Application Architecture

Typical on-premises Gimmal Physical architecture is depicted below.



4.6.1.5.3.4 Installation Components

Component	Description	Deployment Unit

Gimmal Physical Web Access	Software to access Gimmal Physical application.	Modern Web Browser
Gimmal ScannerConnect (optional)	A standalone application that provides an interface for the tethered Zebra DS4608/4278 or any general-purpose barcode scanners.	Client Workstation
Gimmal PortableConnect (optional)	A standalone application that provides an interface for the mobile Zebra TC52 barcode scanner. Supports Android OS 10, 11, 13 and 14.	Client Mobile Scanner

4.6.1.5.3.5 Operating Systems

Gimmal Physical requires Microsoft Windows 2016 64-bit or later running on a physical or virtual computer.

4.6.1.5.3.6 Additional Supporting Applications

Optional Software

- Gimmal Physical FileConnect (see page 422): a Windows service that interfaces with Gimmal Physical web service to push data from network file shares or local folders to the Gimmal Physical for storage. A UI is provided to configure the service.
- Gimmal Physical ScannerConnect: (see page 448) a standalone application that allows users to transfer items in Gimmal Physical. Used for tethered or wireless scanner devices.
- Gimmal Physical PortableConnect (see page 426): An Android application that allows most Zebra TC5x barcode scanners to collect scans and perform transfers into Gimmal Physical. Supports Android 10, 11, 13 and 14.

Identity Management Integration and Single Sign On (SSO)

Gimmal Physical can integrate with the following Single Sign On (SSO) technologies:

- Okta
- Azure Active Directory (AD)
- Microsoft Active Directory Federation Services (ADFS)
- SAML2-based Identity Providers (IdP)

Gimmal Physical REST API

An extensive library of REST-based web services is available for consumption.

4.6.1.5.3.7 Windows Hardware

Please note: These are MINIMUM requirements. The more resources the better the system will perform.

Hardware	Deployment Unit	Minimum Requirement
Hard Disk and Memory *	Web Server	8 GB free disk space 16 GB RAM
	Database Server	16 GB free disk space 16 GB RAM
	Job Services Server	8 GB free disk space 16 GB RAM
Client Workstation	Client Workstation	• Modern web browser • Optional barcode scanner device requires an available COM/USB port

* Ideal Hard Disk and Memory allotments should reflect the volume of records and frequency of transactions. For large installations, we highly recommend benchmarking in your environment to pinpoint the ideal specifications.

4.6.1.5.3.8 Device Hardware

Supported Devices

Device	Description	Specifications
Zebra TC5x (Mobile Scanner) (not including TC51 or its variants)	This scanner is often used in a warehouse, office building, or campus environment to both check-in and out items, as well as reconcile the Gimmal Physical database with where items actually are located.	• USB port for the dock • Android OS versions10, 11, 13, or 14 • Gimmal PortableConnect application (see page 426)

Zebra LI4278 or any general-purpose scanner (Wireless Scanner)	A quick way to check in and out items within the Gimmal ScannerConnect application. Normally used at a file room checkpoint. The base is connected to the computer and the scanner has a limited range.	• USB port • Direct-to-Serial cable for the scanner, with a COM-to-USB adapter • Driver for the adapter; PC to recognize the scanner as a COM port connection • 80-foot range • Gimmal ScannerConnect application (see page 448)
Zebra DS4608 or any general-purpose scanner (Tethered Scanner)	A quick way to check in and out items within the ScannerConnect application, normally used at a file room checkpoint.	• USB port • Direct-to-Serial cable for the scanner, with a COM-to-USB adapter • Driver for the adapter; allows PC to recognize the scanner as a COM port connection • 6ft range tethered scanner • Gimmal ScannerConnect application (see page 448)

4.6.1.5.4 (Legacy Help) Gimmal Physical REST Services Technical Guide

4.6.1.5.4.1 Before You Begin

Setting up Rest API

You will need the correct URLs for accessing Gimmal Physical. For Gimmal Cloud hosted Gimmal Physical, these values resemble the following:

- Application URL: https://<hostname>.gimmal.com/
- REST Web Service URL: https://<hostname>-services.gimmal.com

Please use the test options below to validate yrou connections.

Swagger

After confirming that the REST service is up and running, the 'Swagger' page, https://<hostname>-services.gimmal.com/swagger, can be used to show the different methods that are available in the REST service. This page can be accessed without being authenticated.

> **Warning.** The **Try it out!** is available for each method on the 'Swagger' page and will execute the method, as configured. However, using the **Try it out!** option will execute the API method against your application and may result in unexpected changes to your data/content.

Code Snippet Format

The code snippets contained in this document call the following SetHeaders method. To use it, replace [USERNAME] and [PASSWORD] with the username and password of the account you are using to access the web service.

Note: Infolinx is the former name for Gimmal Physical and can be found in certain methods and documentation.

Sample Code

```
void SetHeaders(HttpWebRequest webRequest, string method, string body)
{
  webRequest.Method = method;
  webRequest.Credentials = new NetworkCredential("[USERNAME] ", "[PASSWORD]");
  webRequest.PreAuthenticate = true;
  webRequest.AllowWriteStreamBuffering = true;
  if (method == "POST" || method == "PUT")
  {
    webRequest.ContentType = "application/json";
    webRequest.ContentLength = body.Length;
    try
    {
      StreamWriter sw = new StreamWriter(webRequest.GetRequestStream());
      sw.Write(body);
      sw.Close();
    }
    catch (Exception ex){}
  }
}
```

4.6.1.5.4.2 Action

4.6.1.5.4.3 To define Actions available for a given Tab ID

Request Type	URL
GET	http://[ServerName]:[Port ID]/api/Action/[ID]

Implementation Notes

Get a list of possible Actions that can be performed for a Tab

Accepts Inputs

Integer with the value of the Tab's ID

Input Parameter Type

URL

Returns

An IEnumerable<IRAction> object with fields described in Response Class below

Response Content Type

Application/json

Response Class

IRAction

Property	Type	Description
action	String (optional)	Name of the action.
caption	String (optional)	Human readable caption for this action.
urlCommand	String (optional)	Used to specify the update command from the phone.
postObject	String (optional)	Object to include as post thing.
associatedTabId	Integer (optional)	Tab id if needed for this action.
associatedTabName	String (optional)	Tab name if needed for this action.
associatedColumnName	String (optional)	Column name if needed for this action.

Sample Code

```
public partial class IRAction
{
  public virtual String Action { get; set; }
  public virtual String Caption { get; set; }
  public virtual String UrlCommand { get; set; }
  public virtual String PostObject { get; set; }
  public virtual Int32 AssociatedTabId { get; set; }
  public virtual String AssociatedTabName { get; set; }
  public virtual String AssociatedColumnName { get; set; }
```

```
}

public IEnumerable<IRAction> GetActions()
{
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/Action/201");
  SetHeaders(webRequest, "GET", null);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  IEnumerable<IRAction> objActions =
JsonConvert.DeserializeObject<IEnumerable<IRAction>>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  return objActions;
}
```

4.6.1.5.4.4 Data Dictionary

To get Data Dictionary Fields for a Tab

Request Type	URL
POST	http://[Servername]:[Port ID]/api/Dictionary

Implementation Notes

Returns an IRDictionary object containing Captions and Column Names of the given Tab ID from Gimmal's Data Dictionary.

Accepts Inputs

- Integer with the value of the applicable Tab ID
- String containing a SpecialSearch query. This must currently always be set to "quicksearch"

Input Parameter Type

Application/json body

Input Parameter Class

IRDictionarySearch

Property	Type	Description
tabId	Integer (required)	Item type to grab dictionary fields for.

Property	Type	Description
specialSearch	String (required)	Special queries; must be set to “quicksearch”.

Returns

An IEnumerable<IRDictionary> object with fields described in Response Class below

Response Content Type

Application/json

Response Class

IRDictionary

Property	Type	Description
caption	String (optional)	Caption for field.
columnName	String (optional)	Column name for field.

Sample Code

```
public partial class IRDictionarySearch
{
  public virtual Int32 TabId { get; set; }
  public virtual String SpecialSearch { get; set; }
}

public partial class IRDictionary
{
  public virtual String Caption { get; set; }
  public virtual String ColumnName { get; set; }
}

public IEnumerable<IRDictionary> GetIRDictionary()
{
  // w is a string containing the http://[Servername]:[Port ID] part of the URL
  IRDictionarySearch Srch = new IRDictionarySearch();
  Srch.TabId = 201;
  Srch.SpecialSearch = "quicksearch";
  string body = JsonConvert.SerializeObject(Srch);
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/Dictionary");
  SetHeaders(webRequest, "POST", body);
```

```
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  IEnumerable<IRDictionary> objDictionary =
JsonConvert.DeserializeObject<IEnumerable<IRDictionary>>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  webResponse = null;
  return objDictionary;
}
```

4.6.1.5.4.5 Item

Create/Update an Item

Request Type	URL
POST	http://[Servername]:[Port ID]/api/Item

Implementation Notes

Update/Create an Item.

When creating, you must provide an IRColumn array entry for each field that is required in the Item table for that Tab, with at least IRColumn.ColumnName and IRColumn.Value provided for each.

For updating you must provide an Item ID as a new entry in the IRColumn array input (not in the IRItem.id) or else a new Item will be created. **Note:** user must have rights within Gimmal Physial to modify the Item or the update will fail.

Accepts Inputs

An IRItem with an array of IRColumns embedded in it; see Input Parameter Format below

Input Parameter Type

Application/json body

Input Parameter Format

- IRItem

Property	Type	Description
columns	Array[IRColumn] (Optional)	Columns, corresponds to view.
tabSingularName	String (optional)	singular name for item's tab
edocFile	String (optional)	Base64 encoded string of the edoc file. If creating, must provide a column value for I_E_USER_FILE_NAME
contentType	String (optional)	content type for uploading edoc file
Id	Integer (optional)	ID of item.
quickDescription	String (optional)	Quick Description
barcode	String (optional)	Barcode
tabId	Integer (optional)	ID of tab.

- IRColumn

Property	Type	Description
columnName	String (optional)	Name of column.
caption	String (optional)	Caption of column.
value	String (optional)	Value of column.
type	String (optional)	Data type of column.

Returns

• An IRItemResultList object with a Message, Result, and array of IRItemResult fields described in Response Class below

Response Content Type

Application/json

Response Class

- IRItemResultList

Property	Type	Description
message	String (optional)	Overall result string for the list.
result	Boolean (optional)	False if any failed.
itemResults	Array[IRItemResult] (Optional)	The list of individual item results.

- IRItemResult

Property	Type	Description
locationBarcode	String (optional)	Location barcode if applicable for the action.
locationDescription	String (optional)	Location QD if applicable for the action.
itemId	Integer (optional)	ID of item.
itemBarcode	String (optional)	Barcode of item.
itemDescription	String (optional)	Quick Description of item.
requestId	Integer (optional)	ID of Request (if this was a request).
result	Boolean (optional)	Successful or not.
reason	Integer (optional)	Corresponds to some enum for hardcoded results.
message	String (optional)	May contain additional info about why this failed.

Sample Code

```
// ******************************************
// * Item - Create/Update an Item
// ******************************************

public partial class IRItem
```

```
{
  public virtual List<IRColumn> columns { get; set; }
  public virtual String TabSingularName { get; set; }
  public virtual String EdocFile { get; set; }
  public virtual String ContentType { get; set; }
  public virtual Int32 Id { get; set; }
  public virtual String QuickDescription { get; set; }
  public virtual String Barcode { get; set; }
  public virtual Int32 TabId { get; set; }
}

public partial class IRColumn
{
  public virtual String ColumnName { get; set; }
  public virtual String Caption { get; set; }
  public virtual String Value { get; set; }
  public virtual String Type { get; set; }
}

public partial class IRItemResultList
{
  public virtual String Message { get; set; }
  public virtual bool Result { get; set; }
  public virtual IRItemResult[] ItemResults { get; set; }
}

public partial class IRItemResult
{
  public virtual String LocationBarcode { get; set; }
  public virtual String LocationDescription { get; set; }
  public virtual Int32 ItemId { get; set; }
  public virtual String ItemBarcode { get; set; }
  public virtual String ItemDescription { get; set; }
  public virtual Int32 RequestId { get; set; }
  public virtual bool Result { get; set; }
  public virtual Int32 Reason { get; set; }
  public virtual String Message { get; set; }
}

public IRItemResultList CreateUpdateItem()
{
  // w is a string containing the http://[Servername]:[Port ID] part of the URL
  // IRColumns -- To create a new Item, you must provide at a minimum an IRColumn

  object
  // for each of that Item's requred fields for that Gimmal implementation,
  // though additional Item fields are allowed. The following three fields were

  required for
  // the Gimmal implementation that was used to create the sample code;
  // the fields required for your implementation will be different

  IRColumn IRC0 = new IRColumn();
  IRC0.ColumnName = "FK_ITEM_ORGANIZATION_ID";
  // IRC.Caption = "";
  IRC0.Value = "501";
  // IRC.Type = "";
```

```
  IRColumn IRC1 = new IRColumn();
  IRC1.ColumnName = "CONTENTS_RANGE___DATE";
  IRC1.Value = "1/1/2014-2/2/2015";
  IRColumn IRC2 = new IRColumn();
  IRC2.ColumnName = "I_IT_ID";
  IRC2.Value = "202";

  // Updating an existing Item requires adding the following 3 lines substituting the
Item's ID for the "303" value
  // Failure to specify an Item ID will result in the creation of a new Item
  // IRColumn IRC3 = new IRColumn();
  // IRC3.ColumnName = "I_ID";
  // IRC3.Value = "303";

  IRItem IRI = new IRItem();
  IRI.columns = new List<IRColumn> { }
  IRI.columns.Add(IRC0);
  IRI.columns.Add(IRC1);
  IRI.columns.Add(IRC2);

  // IRI.columns.Add(IRC3);
  // Alternative shorthand method:
  // IRI.columns = new List<IRColumn> {
  // new IRColumn { ColumnName="FK_ITEM_ORGANIZATION_ID", Value="302"},
  // new IRColumn { ColumnName="CONTENTS_RANGE___DATE", Value="1/1/2014-1/1/2015"},
  // new IRColumn { ColumnName="I_IT_ID", Value="202"}
  // };

  List<IRItem> iList = new List<IRItem>();
  iList.Add(IRI);
  string body = JsonConvert.SerializeObject(iList);
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/Item");
  SetHeaders(webRequest, "POST", body);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  IRItemResultList objNewItem =
JsonConvert.DeserializeObject<IRItemResultList>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  webResponse = null;
  return objNewItem;
}
```

Delete an Item by its ID

Request Type	URL
DELETE	http://[Servername]:[Port ID]/api/Item/[ID]

Implementation Notes

Deletes the Item that corresponds to the supplied Item ID

Accepts Inputs

• Integer Item ID

Input Parameter Type

URL

Returns

• An IRItemResult object with fields described in Response Class below

Response Content Type

Application/json

Response Class

IRItemResult

Property	Type	Description
locationBarcode	String (optional)	Location barcode if applicable for the action.
locationDescription	String (optional)	Location QD if applicable for the action.
itemId	Integer (optional)	ID of item.
itemBarcode	String (optional)	Barcode of item.
itemDescription	String (optional)	QuickDescription of item.
requestId	Integer (optional)	ID of request (if this was a request).
result	Boolean (optional)	Successful or not.
reason	Integer (optional)	Corresponds to some enum for harcoded results.

Property	Type	Description
message	String (optional)	May contain some extra info about why this failed.

Sample Code

```
// ****************************************************************
// * Item - Delete an Item
// * Sets column I_Deleted to true in the Item's database table
// ****************************************************************

// w is a string containing the http://[Servername]:[Port ID] part of the URL
// 1203 is the ID of the Box to be deleted
// objItemResult.Result will be true if successful

public partial class IRItemResult
{
  public virtual String LocationBarcode { get; set; }
  public virtual String LocationDescription { get; set; }
  public virtual Int32 ItemId { get; set; }
  public virtual String ItemBarcode { get; set; }
  public virtual String ItemDescription { get; set; }
  public virtual Int32 RequestId { get; set; }
  public virtual bool Result { get; set; }
  public virtual Int32 Reason { get; set; }
  public virtual String Message { get; set; }
}

public IRItemResult DeleteItem()
{
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/Item/1203");
  SetHeaders(webRequest, "DELETE", null);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  IRItemResult objItemResult =
JsonConvert.DeserializeObject<IRItemResult>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  return objItemResult;
}
```

Get an Item by its ID

Request Type	URL
GET	http://[Servername]:[Port ID]/api/Item/[ID]

Implementation Notes

Get an Item by its Item ID.

Accepts Inputs

• Integer Item ID

Input Parameter Type

URL

Returns

• An IRItem object containing an array of IRColumns with fields described in Response Class below

Response Content Type

Application/json

Response Class

- IRItem

Property	Type	Description
columns	Array[IRColumn] (Optional)	Columns; corresponds to view.
tabSingularName	String (optional)	Singular name for item's tab.
edocFile	String (optional)	Base64 encoded string of the edoc file. If creating, must provide a column value for I_E_USER_FILE_NAME
contentType	String (optional)	Content type for uploading edoc file.
Id	Integer (optional)	Item id of item.
quickDescription	String (optional)	Quick Description.
barcode	String (optional)	Barcode.

Property	Type	Description
tabId	Integer (optional)	ID of tab.

- IRColumn

Property	Type	Description
columnName	String (optional)	Name of column.
caption	String (optional)	Caption of column.
value	String (optional)	Value of column.
type	String (optional)	Data type of column.

Sample Code

```
// ********************************************************************************
// * Item - Get a single Item by its ID
// ********************************************************************************

// w is a string containing the http://[Servername]:[Port ID] part of the URL
// 303 is the ID of the Box being retrieved
// objItem will contain the Item if the get is successful

public partial class IRItem
{
  public virtual List<IRColumn> columns { get; set;
  public virtual String TabSingularName { get; set; }
  public virtual String EdocFile { get; set; }
  public virtual String ContentType { get; set; }
  public virtual Int32 Id { get; set; }
  public virtual String QuickDescription { get; set; }
  public virtual String Barcode { get; set; }
  public virtual Int32 TabId { get; set; }
}

public partial class IRColumn
{
  public virtual String ColumnName { get; set; }
  public virtual String Caption { get; set; }
  public virtual String Value { get; set; }
  public virtual String Type { get; set; }
}
```

```
public IRItem GetItemByID()
{
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/Item/303");
  SetHeaders(webRequest, "GET", null);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  IRItem objItem = JsonConvert.DeserializeObject<IRItem>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  return objItem;
}
```

Perform an Advanced Search for an Item

Request Type	URL
POST	http://[Servername]:[Port ID]/api/ItemSearch

Implementation Notes

Uses an IRItemSearch object to do a more advanced search for an Gimmal Item.

TabID is a required field.

The search types are limited; you cannot use this to search using a Range Field.

Special Search allowed values:

• Not set or "*none*" – default value; Special Search not set

• "*missing*" – return Items of the given TabID that have been marked as missing

• "*topshelfuser*" – return Items of the given TabID that are top level items, that can't be contained in any other item

• "*keyword*" – returns all Items of the given TabID that contain the supplied keyword in any of their database columns

• "*mycontents*" – not currently documented

• "*crudxml*" – not currently documented

Accepts Inputs

An IRItemSearch with an array of KeyValuePairs embedded in it. See Input Parameter Format below

Input Parameter Type

Application/json body

Input Parameter Format

IRItemSearch

Property	Type	Description
specialSearch	String (optional)	Special searches.
lastSyncDate	String (optional)	Used for topshelfuser search to only get items created after this date.
tabId	Integer (required)	ID of tab.
Barcode	String (optional)	Barcode of item.
searchTerms	Dictionary<String, object> (Optional)	If nothing else is provided, Gimmal will use this for an advanced search.
includeEdocFile	Boolean (optional)	Whether the actual edoc file should be returned with the metadata. Not used right now, file is always included.
viewDisplay	Boolean (optional)	Just return the fields that should be shown on the view page.
getForeignKeyDesc	Boolean (optional)	For foreign keys, get the text or quick description instead of the ID.
crudXml	String (optional)	

Returns

• An IEnumerable<IRItem> object containing a list of IRColumn fields described in Response Class below

Response Content Type

Application/json

Response Class

- IRItem

Property	Type	Description
columns	Array[IRColumn] (Optional)	Columns; corresponds to view.
tabSingularName	String (optional)	Singular name for item's tab.
edocFile	String (optional)	Base64 encoded string of the edoc file. If creating, must provide a column value for I_E_USER_FILE_NAME
contentType	String (optional)	Content type for uploading edoc file.
Id	Integer (optional)	Item id of item.
quickDescription	String (optional)	Quick Description.
barcode	String (optional)	Barcode.
tabId	Integer (optional)	ID of tab.

- IRColumn

Property	Type	Description
columnName	String (optional)	Name of column.
caption	String (optional)	Caption of column.
value	String (optional)	Value of column.
type	String (optional)	Data type of column.

Sample Code

```
// ****************************************************************************
// * Item - Advance Search for Items
// ****************************************************************************

public partial class IRItem
{
  public virtual List<IRColumn> columns { get; set; }
  public virtual String TabSingularName { get; set; }
  public virtual String EdocFile { get; set; }
  public virtual String ContentType { get; set; }
  public virtual Int32 Id { get; set; }
  public virtual String QuickDescription { get; set; }
  public virtual String Barcode { get; set; }
  public virtual Int32 TabId { get; set; }
}

public partial class IRColumn
{
  public virtual String ColumnName { get; set; }
  public virtual String Caption { get; set; }
  public virtual String Value { get; set; }
  public virtual String Type { get; set; }
]

public partial class IRItemSearch
{
  public virtual String SpecialSearch { get; set; }
  public virtual String LastSyncDate { get; set; }
  public virtual int TabId { get; set; }
  public virtual String Barcode { get; set; }
  public virtual Dictionary<String, object> SearchTerms { get; set; }
  public virtual bool IncludeEdocFile { get; set; }
  public virtual bool ViewDisplay { get; set; }
  public virtual bool GetForeignKeyDesc { get; set; }
  public virtual String CrudXML { get; set; }
}

public IEnumerable<IRItem> ItemSearch()
{
  // w is a string containing the http://[Servername]:[Port ID] part of the URL
  IRItemSearch IRIS = new IRItemSearch();
  IRIS.TabId = 202; // Box Item Type
  IRIS.SearchTerms = new Dictionary<String, object>();

  // Search the "Box_Description" database column for rows with value "Little Box":
  IRIS.SearchTerms.Add("BOX_DESCRIPTION", "Little Box");
  // Search for Missing Boxes
  //IRIS.SpecialSearch = "missing";
  string body = JsonConvert.SerializeObject(IRIS);
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/ItemSearch");
  SetHeaders(webRequest, "POST", body)
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  IEnumerable<IRItem> objFoundItems =
JsonConvert.DeserializeObject<IEnumerable<IRItem>>(sr.ReadToEnd());
  sr.Close();
```

```
    webResponse.Close();
    webResponse = null;
    return objFoundItems;
  }
```

Get the view URL for the given Item ID of an Item

Request Type	URL
GET	http://[Servername]:[Port ID]/api/viewurl/[Item ID]

Implementation Notes

Get the URL to view an Item by its Item ID.

Accepts Inputs

• Integer Item ID

Input Parameter Type

URL Query String

Returns

• A string containing the URL to the Item represented by the given Item ID

Response Content Type

Application/json

Response Class

string

Sample Code

```
  // ****************************************************************************
  // * Item - Get the URL for a single Item by its ID
  // ****************************************************************************
```

```
// w is a string containing the http://[Servername]:[Port ID] part of the URL
// 303 is the ID of the Box whose URL we want

public String GetURLByID()
{
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/viewurl/303");
  SetHeaders(webRequest, "GET", null);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  String strURL = JsonConvert.DeserializeObject<String>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  return strURL;
}
```

4.6.1.5.4.6 Get Label Queues for a Tab

Request Type	URL
GET	http://[Servername]:[Port ID]/api/labelprofiles/[Tab ID]

Implementation Notes

Get label queues that are available for the given Tab ID

Accepts Inputs

• Integer Tab ID.

Input Parameter Type

URL

Input Parameter Class

None.

Returns

• An IEnumerable<IRLabelProfile> object with fields described in Response Class below

Response Content Type

Application/json

Response Class

IRLabelProfile

Property	Type	Description
name	String (optional)	Name of profile.
Id	Integer (optional)	ID of profile.
vendorId	Integer (optional)	ID of vendor.

Sample Code

```
// ****************************************************************************
// * Label - Get Label Queues for a given Tab (Item Type)
// ****************************************************************************

public partial class IRLabelProfile
{
  public virtual String Name { get; set; }
  public virtual int Id { get; set; }
  public virtual int VendorId { get; set; }
}

// w is a string containing the http://[Servername]:[Port ID] part of the URL
// 202 is the Item Type ID

public IEnumerable<IRLabelProfile> GetLabelQueues()
{
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/labelprofiles/202");
  SetHeaders(webRequest, "GET", null);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  IEnumerable<IRLabelProfile> objQueues =
JsonConvert.DeserializeObject<IEnumerable<IRLabelProfile>>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  return objQueues;
}
```

4.6.1.5.4.7 Picklist

To get the Picklist for a Tab

Request Type	URL
GET	http://[Servername]:[Port ID]/api/Picklist/[Tab ID]

Implementation Notes

Gets Picklist rows for a given TabID

Accepts Inputs

• Integer TabID

Input Parameter Type

URL

Returns

• An IRPicklistItem object with fields described in Response Class below

Response Content Type

Application/json

Response Class

IRPicklistItem

Property	Type	Description
columns	Array[KeyValuePair[String,Object] (Optional)	Columns on the picklist report.
quickDescription	String (optional)	
Id	Integer (optional)	
tabId	Integer (optional)	

Property	Type	Description
keyValuePair[String,Object]		
key	String (optional)	
value	String (optional)	

Sample Code

```
// ***************************************************************************
// * Picklist - Gets picklist rows for a given Tab (Item Type)
// ***************************************************************************

public partial class IRPicklistItem
{
  public virtual Dictionary<String, object> Columns { get; set; }
  public virtual String QuickDescription { get; set; }
  public virtual int Id { get; set; }
  public virtual int TabId { get; set; }
}

// w is a string containing the http://[Servername]:[Port ID] part of the URL
// 202 is the integer TabID (Item Type ID)

public IEnumerable<IRPicklistItem> GetPicklistByTab()
{
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/picklist/202");
  SetHeaders(webRequest, "GET", null);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  IEnumerable<IRPicklistItem> objItems =
JsonConvert.DeserializeObject<IEnumerable<IRPicklistItem>>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  return objItems;
}
```

4.6.1.5.4.8 Request

Get all Item checkout Requests

Request Type	URL
GET	http://[Servername]:[Port ID]/api/Request

Implementation Notes

Gets data describing all Gimmal Item checkout Requests

Accepts Inputs

None

Returns

• An IRRequest array with fields described in Response Class below. If there are no requests, the response body will have 0 length

Response Content Type

Application/json

Response Class

IRRequest

Property	Type	Description
Id	Integer (optional)	Auto-provided for new requests.
itemId	Integer (optional)	Required for new requests.
itemDescription	String (optional)	Quick Description for item, only provided if GetDescription = true.
destinationItemId	Integer (optional)	The item ID for the destination.
destinationDescription	String (optional)	QD for destination, only provided if GetDescription = true.
waitlist	Boolean (optional)	Auto-provided for new requests.
createDate	String (optional)	The create date.

Property	Type	Description
requestorName	String (optional)	Auto-provided for new requests.
requestorDesc	String (optional)	Auto-provided for new requests.
status	Integer (optional)	Status ID
statusDescription	String (optional)	Text value for status.
batchNumber	Integer (optional)	Useful for tracking a batch of requests in Gimmal .
fulfillmentMethod	Integer (optional)	Used if fulfillment method other than transferring is desired.
requestType	Integer (optional)	Required and only applicable for new requests.
comment	String (optional)	Comment.

Sample Code

```
// ****************************************************************************
// * Request - Gets all checkout Requests in Gimmal
// ****************************************************************************

public partial class IRRequest
{
  public virtual int Id { get; set; }
  public virtual int ItemId { get; set; }
  public virtual String ItemDescription { get; set; }
  public virtual int DestinationItemId { get; set; }
  public virtual String DestinationDescription { get; set; }
  public virtual bool Waitlist { get; set; }
  public virtual String CreateDate { get; set; }
  public virtual String RequestorName { get; set; }
  public virtual String RequestorDesc { get; set; }
  public virtual int Status { get; set; }
  public virtual String StatusDescription { get; set; }
  public virtual int BatchNumber { get; set; }
  public virtual int FulfillmentMethod { get; set; }
  public virtual int RequestType { get; set; }
  public virtual String Comment { get; set; }
}

// w is a string containing the http://[Servername]:[Port ID] part of the URL
```

```
public IEnumerable<IRRequest> GetAllRequests()
{
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/Request");
  SetHeaders(webRequest, "GET", null);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  IEnumerable<IRRequest> objRequests =
JsonConvert.DeserializeObject<IEnumerable<IRRequest>>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  return objRequests;
}
```

Create a new Item checkout Request

Request Type	URL
POST	http://[Servername]:[Port ID]/api/Request

Implementation Notes

Generates a new Item checkout Request. If destination Item is not provided, then a container is auto selected. Request Type can be 1 (Delivery), 2 (Pickup), or 4 (Renew).

Accepts Inputs

See Input Parameter Format below

Input Parameter Type

Application/json body

Input Parameter Format

IRRequest

Property	Type	Description
Id	Integer (optional)	Auto-provided for new requests.
itemId	Integer (optional)	Required for new requests.

Property	Type	Description
itemDescription	String (optional)	Quick Description for item, only provided if GetDescription = true.
destinationItemId	Integer (optional)	The item ID for the destination.
destinationDescription	String (optional)	QD for destination, only provided if GetDescription = true.
waitlist	Boolean (optional)	Auto-provided for new requests.
createDate	String (optional)	The create date.
requestorName	String (optional)	Auto-provided for new requests.
requestorDesc	String (optional)	Auto-provided for new requests.
status	Integer (optional)	Status ID
statusDescription	String (optional)	Text value for status.
batchNumber	Integer (optional)	Useful for tracking a batch of requests in Gimmal Physical.
fulfillmentMethod	Integer (optional)	Used if fulfillment method other than transferring is desired.
requestType	Integer (optional)	Required and only applicable for new requests.
comment	String (optional)	Comment.

Returns

• An IRRequestResult object containing an IRRequest object, ItemBarcode, ItemDescription, Message, and Result fields described in Response Class below

Response Content Type

Application/json

Response Class

- IRRequestResult

Property	Type	Description
request	IRReqest (optional)	The resulting request. Not included if you deleted the request.
itemBarcode	String (optional)	The barcode of the item that was requested.
itemDescription	String (optional)	The description of the item that was requested.
message	String (optional)	If failed, the reason why.
result	Boolean (optional)	Success/fail.

- IRRequest

Property	Type	Description
Id	Integer (optional)	Auto-provided for new requests.
itemId	Integer (optional)	Required for new requests.
itemDescription	String (optional)	Quick Description for item, only provided if GetDescription = true.
destinationItemId	Integer (optional)	The item ID for the destination.
destinationDescription	String (optional)	QD for destination, only provided if GetDescription = true.
waitlist	Boolean (optional)	Auto-provided for new requests.
createDate	String (optional)	The create date.
requestorName	String (optional)	Auto-provided for new requests.
requestorDesc	String (optional)	Auto-provided for new requests.

Property	Type	Description
status	Integer (optional)	Status ID
statusDescription	String (optional)	Text value for status.
batchNumber	Integer (optional)	Useful for tracking a batch of requests in Gimmal Physical.
fulfillmentMethod	Integer (optional)	Used if fulfillment method other than transferring is desired.
requestType	Integer (optional)	Required and only applicable for new requests.
comment	String (optional)	Comment.

Sample Code

```
// ***************************************************************************
// * Request - Create a new Item checkout Request
// ***************************************************************************

public partial class IRRequest
{
  public virtual int Id { get; set; }
  public virtual int ItemId { get; set; }
  public virtual String ItemDescription { get; set; }
  public virtual int DestinationItemId { get; set; }
  public virtual String DestinationDescription { get; set; }
  public virtual bool Waitlist { get; set; }
  public virtual String CreateDate { get; set; }
  public virtual String RequestorName { get; set; }
  public virtual String RequestorDesc { get; set; }
  public virtual int Status { get; set; }
  public virtual String StatusDescription { get; set; }
  public virtual int BatchNumber { get; set; }
  public virtual int FulfillmentMethod { get; set; }
  public virtual int RequestType { get; set; }
  public virtual String Comment { get; set; }
}

public partial class IRRequestResult
{
  public virtual IRRequest Request { get; set; }
  public virtual String ItemBarcode { get; set; }
  public virtual String ItemDescription { get; set; }
  public virtual String Message { get; set; }
  public virtual bool Result { get; set; }
```

```
}

public IRRequestResult CreateRequest()
{
  // w is a string containing the http://[Servername]:[Port ID] part of the URL
  IRRequest Request = new IRRequest();
  Request.ItemId = 40000; // Required; ID of the Item being checked out
  Request.RequestType = 1; // Required; 1=Delivery; 2=Pickup; 4=Renew
  Request.DestinationItemId = 201; // ID of the user to check the Item out to
  string body = JsonConvert.SerializeObject(Request);
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/Request");
  SetHeaders(webRequest, "POST", body);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  IRRequestResult objResult =
JsonConvert.DeserializeObject<IRRequestResult>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  webResponse = null;
  return objResult;
}
```

Delete an Item checkout Request by Request ID

Request Type	URL
DELETE	http://[Servername]:[Port ID]/api/Request/[ID]

Implementation Notes

Deletes the Item checkout Request that corresponds to the supplied Request ID. If successful, webResponse.StatusCode will be "OK."

Accepts Inputs

• Integer Request ID

Input Parameter Type

URL

Returns

• An HttpStatusCode object

Response Content Type

Application/json

Response Class

HttpStatusCode

Sample Code

```
// ******************************************************************
// * Request - Delete an Item checkout Request
// ******************************************************************

// w is a string containing the http://[Servername]:[Port ID] part of the URL
// 217 is the ID of the Request to be deleted
// If successful, webResponse.StatusCode will be "OK"

public HttpStatusCode DeleteRequest()
{
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/Request/217");
  SetHeaders(webRequest, "DELETE", null);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  return webResponse.StatusCode;
}
```

Get an Item checkout Request by Request ID

Request Type	URL
GET	http://[Servername]:[Port ID]/api/Request/[ID]

Implementation Notes

Gets the Item checkout Request that corresponds to the supplied Request ID.

Accepts Inputs

• Integer Request ID

Input Parameter Type

URL

Returns

• An IRRequest object with fields described in Response Class below.

Response Content Type

Application/json

Response Class

IRRequest

Property	Type	Description
Id	Integer (optional)	Auto-provided for new requests.
itemId	Integer (optional)	Required for new requests.
itemDescription	String (optional)	Quick Description for item, only provided if GetDescription = true.
destinationItemId	Integer (optional)	The item ID for the destination.
destinationDescription	String (optional)	QD for destination, only provided if GetDescription = true.
waitlist	Boolean (optional)	Auto-provided for new requests.
createDate	String (optional)	The create date.
requestorName	String (optional)	Auto-provided for new requests.
requestorDesc	String (optional)	Auto-provided for new requests.
status	Integer (optional)	Status ID
statusDescription	String (optional)	Text value for status.

Property	Type	Description
batchNumber	Integer (optional)	Useful for tracking a batch of requests in Gimmal Physical.
fulfillmentMethod	Integer (optional)	Used if fulfillment method other than transferring is desired.
requestType	Integer (optional)	Required and only applicable for new requests.
comment	String (optional)	Comment.

Sample Code

```
// ***************************************************************************
// * Request - Gets checkout Request by Request ID
// ***************************************************************************

public partial class IRRequest
{
  public virtual int Id { get; set; }
  public virtual int ItemId { get; set; }
  public virtual String ItemDescription { get; set; }
  public virtual int DestinationItemId { get; set; }
  public virtual String DestinationDescription { get; set; }
  public virtual bool Waitlist { get; set; }
  public virtual String CreateDate { get; set; }
  public virtual String RequestorName { get; set; }
  public virtual String RequestorDesc { get; set; }
  public virtual int Status { get; set; }
  public virtual String StatusDescription { get; set; }
  public virtual int BatchNumber { get; set; }
  public virtual int FulfillmentMethod { get; set; }
  public virtual int RequestType { get; set;
  public virtual String Comment { get; set; }
}

// w is a string containing the http://[Servername]:[Port ID] part of the URL
// 215 is the ID of the checkout Request to get

public IRRequest GetRequestByID()
{
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/Request/215");
  SetHeaders(webRequest, "GET", null);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  IRRequest objRequest = JsonConvert.DeserializeObject<IRRequest>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
```

```
    return objRequest;
}
```

Update an Item's existing checkout Request by Request ID

Request Type	URL
PUT	http://[Servername]:[Port ID]/api/Request/[ID]

Implementation Notes

Update the existing Item checkout Request that corresponds to the given ID.

Accepts Inputs

• Request ID (required)

• Status (required)

Possible Status Values:

- 1 = Approved
- 2 = Fulfilled
- 3 = Rejected
- 5 = Deleted

See Input Parameter Format below for additional fields.

Input Parameter Type

Application/json body

Input Parameter Format

IRRequest

Property	Type	Description
Id	Integer (optional)	Auto-provided for new requests.

Property	Type	Description
itemId	Integer (optional)	Required for new requests.
itemDescription	String (optional)	Quick Description for item, only provided if GetDescription = true.
destinationItemId	Integer (optional)	The item ID for the destination.
destinationDescription	String (optional)	QD for destination, only provided if GetDescription = true.
waitlist	Boolean (optional)	Auto-provided for new requests.
createDate	String (optional)	The create date.
requestorName	String (optional)	Auto-provided for new requests.
requestorDesc	String (optional)	Auto-provided for new requests.
status	Integer (optional)	Status ID
statusDescription	String (optional)	Text value for status.
batchNumber	Integer (optional)	Useful for tracking a batch of requests in Gimmal Physical.
fulfillmentMethod	Integer (optional)	Used if fulfillment method other than transferring is desired.
requestType	Integer (optional)	Required and only applicable for new requests.
comment	String (optional)	Comment.

Returns

• An IRRequestResult object with an IRRequest object, ItemBarcode, ItemDescription, Message, and Result fields described in Response Class below

Response Content Type

Application/json

Response Class

IRRequestResult

Property	Type	Description
request	IRReqest (optional)	The resulting request. Not included if you deleted the request.
itemBarcode	String (optional)	The barcode of the item that was requested.
itemDescription	String (optional)	The description of the item that was requested.
message	String (optional)	If failed, the reason why.
result	Boolean (optional)	Success/fail.

IRRequest

Property	Type	Description
Id	Integer (optional)	Auto-provided for new requests.
itemId	Integer (optional)	Required for new requests.
itemDescription	String (optional)	Quick Description for item, only provided if GetDescription = true.
destinationItemId	Integer (optional)	The item ID for the destination.
destinationDescription	String (optional)	QD for destination, only provided if GetDescription = true.
waitlist	Boolean (optional)	Auto-provided for new requests.
createDate	String (optional)	The create date.
requestorName	String (optional)	Auto-provided for new requests.
requestorDesc	String (optional)	Auto-provided for new requests.

Property	Type	Description
status	Integer (optional)	Status ID
statusDescription	String (optional)	Text value for status.
batchNumber	Integer (optional)	Useful for tracking a batch of requests in Gimmal Physical.
fulfillmentMethod	Integer (optional)	Used if fulfillment method other than transferring is desired.
requestType	Integer (optional)	Required and only applicable for new requests.
comment	String (optional)	Comment.

Sample Code

```
// ****************************************************************************
// * Request - Update an existing checkout Request
// ****************************************************************************

public partial class IRRequest
{
  public virtual int Id { get; set; }
  public virtual int ItemId { get; set; }
  public virtual String ItemDescription { get; set; }
  public virtual int DestinationItemId { get; set; }
  public virtual String DestinationDescription { get; set; }
  public virtual bool Waitlist { get; set; }
  public virtual String CreateDate { get; set; }
  public virtual String RequestorName { get; set; }
  public virtual String RequestorDesc { get; set; }
  public virtual int Status { get; set; }
  public virtual String StatusDescription { get; set; }
  public virtual int BatchNumber { get; set; }
  public virtual int FulfillmentMethod { get; set; }
  public virtual int RequestType { get; set; }
  public virtual String Comment { get; set; }
}

public partial class IRRequestResult
{
  public virtual IRRequest Request { get; set; }
  public virtual String ItemBarcode { get; set;
  public virtual String ItemDescription { get; set; }
  public virtual String Message { get; set; }
  public virtual bool Result { get; set; }
```

```
}

// w is a string containing the http://[Servername]:[Port ID] part of the URL
// 215 is the ID of the Request you're updating

public IRRequestResult UpdateRequest()
{
  IRRequest Request = new IRRequest();
  Request.Status = 2; //Possible Status Values: 1 = Approved; 2 = Fulfilled; 3 =
Rejected; 5 = Deleted
  Request.DestinationItemId = 201; // ID of the user to check the Item out to
  string body = JsonConvert.SerializeObject(Request);
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/Request/215");
  SetHeaders(webRequest, "PUT", body);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  IRRequestResult objResult =
JsonConvert.DeserializeObject<IRRequestResult>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  webResponse = null;
  return objResult;
}
```

4.6.1.5.4.9 Perform an advanced search for Item checkout Requests

Request Type	URL
POST	http://[Servername]:[Port ID]/api/requestsearch

Implementation Notes

Perform an advanced search for Item checkout Requests.

Potential Report Values: 1 (Approved); 2 (Fulfilled).

Accepts Inputs

See Input Parameter Format below

Input Parameter Type

Application/json body

Input Parameter Format

IRRequestSearch

Property	Type	Description
onlyMine	Boolean (optional)	Only get my requests.
report	Integer (optional)	Only requests on the picklist, 2: only requests on the pickup report. TabId is required.
tabId	Integer (optional)	Only get requests for a certain tab.
getDescriptions	Boolean (optional)	Whether to retrieve item descriptions or not.

Returns

• An IRRequest object with fields described in Response Class below

Response Content Type

Application/json

Response Class

IRRequest

Property	Type	Description
Id	Integer (optional)	Auto-provided for new requests.
itemId	Integer (optional)	Required for new requests.
itemDescription	String (optional)	Quick Description for item, only provided if GetDescription = true.
destinationItemId	Integer (optional)	The item ID for the destination.
destinationDescription	String (optional)	QD for destination, only provided if GetDescription = true.
waitlist	Boolean (optional)	Auto-provided for new requests.

Property	Type	Description
createDate	String (optional)	The create date.
requestorName	String (optional)	Auto-provided for new requests.
requestorDesc	String (optional)	Auto-provided for new requests.
status	Integer (optional)	Status ID
statusDescription	String (optional)	Text value for status.
batchNumber	Integer (optional)	Useful for tracking a batch of requests in Gimmal Physical.
fulfillmentMethod	Integer (optional)	Used if fulfillment method other than transferring is desired.
requestType	Integer (optional)	Required and only applicable for new requests.
comment	String (optional)	Comment.

Sample Code

```
// ****************************************************************************
// * Request - Find Item checkout Requests
// ****************************************************************************

public partial class IRRequestSearch
{
  public virtual bool OnlyMine { get; set; }
  public virtual int Report { get; set; }
  public virtual int TabId { get; set; }
  public virtual bool GetDescriptions { get; set; }
}

public partial class IRRequest
{
  public virtual int Id { get; set; }
  public virtual int ItemId { get; set; }
  public virtual String ItemDescription { get; set; }
  public virtual int DestinationItemId { get; set; }
  public virtual String DestinationDescription { get; set; }
  public virtual bool Waitlist { get; set; }
  public virtual String CreateDate { get; set; }
```

```
    public virtual String RequestorName { get; set; }
    public virtual String RequestorDesc { get; set; }
    public virtual int Status { get; set; }
    public virtual String StatusDescription { get; set; }
    public virtual int BatchNumber { get; set; }
    public virtual int FulfillmentMethod { get; set; }
    public virtual int RequestType { get; set; }
    public virtual String Comment { get; set; }
  }

  public IEnumerable<IRRequest> FindRequest()
  {
    // w is a string containing the http://[Servername]:[Port ID] part of the URL
    IRRequestSearch RequestSearch = new IRRequestSearch();
    string body = JsonConvert.SerializeObject(RequestSearch);
    var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/requestsearch");
    SetHeaders(webRequest, "POST", body);
    var webResponse = (HttpWebResponse)webRequest.GetResponse();
    StreamReader sr = new StreamReader(webResponse.GetResponseStream());
    IEnumerable<IRRequest> objResult =
  JsonConvert.DeserializeObject<IEnumerable<IRRequest>>(sr.ReadToEnd());
    sr.Close();
    webResponse.Close();
    webResponse = null;
    return objResult;
  }
```

4.6.1.5.4.10 Server Time

To get the UTC time from the Gimmal Web Server

Request Type	URL
GET	http://[Servername]:[Port ID]/api/ServerTime

Implementation Notes

Gets the UTC time from the Gimmal Web Server

Accepts Inputs

None

Input Parameter Type

None

Returns

• A string containing the Gimmal Web Server's UTC time

Response Content Type

Application/json

Response Class

string

Sample Code

```
// ***************************************************************************
// * ServerTime - Get the UTC time from the Gimmal Web Server
// ***************************************************************************

// w is a string containing the http://[Servername]:[Port ID] part of the URL

public DateTime GetDateTime()
{
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/servertime");
  SetHeaders(webRequest, "GET", null);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  // Converting the string response to a DateTime object
  DateTime objItems = JsonConvert.DeserializeObject<DateTime>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  return objItems;
}
```

4.6.1.5.4.11 Tab

Get all Tabs

Request Type	URL
GET	http://[Servername]:[Port ID]/api/Tab

Implementation Notes

Gets data describing all Gimmal Physical Tabs

Accepts Inputs

None

Input Parameter Type

None

Returns

• An IRTab array with fields described in Response Class below

Response Content Type

Application/json

Response Class

IRTab

Property	Type	Description
Id	Integer (optional)	ID of tab.
singularName	String (optional)	Singular name for tab.
pluralName	String (optional)	Plural name for tab.
isMoveable	Boolean (optional)	Tab is moveable.
isRequestable	Boolean (optional)	Tab can be requested.
autoGenerateBarcode	Boolean (optional)	Tab has barcode auto-generated.
isBarcodeRequired	Boolean (optional)	Whether barcode is required. if not, probably logical tab.
barcodePrefix	String (optional)	Prefix for barcode.

Property	Type	Description
barcodeLength	Integer (optional)	Length for barcode.
isEdoc	Boolean (optional)	Tab is edoc.
displayOrder	Integer (optional)	Display order.
isRetentionEnabled	Boolean (optional)	Tab uses retention.
specialType	Integer (optional)	Special type.

Sample Code

```
// ****************************************************************************
// * Tab - Get all Tabs
// ****************************************************************************

public partial class IRTab
{
  public virtual Int32 Id { get; set; }
  public virtual String SingularName { get; set; }
  public virtual String PluralName { get; set; }
  public virtual Boolean IsMoveable { get; set; }
  public virtual Boolean IsRequestable { get; set; }
  public virtual Boolean AutoGenerateBarcode { get; set; }
  public virtual Boolean IsBarcodeRequired { get; set; }
  public virtual String BarcodePrefix { get; set; }
  public virtual Int32 BarcodeLength { get; set; }
  public virtual Boolean IsEdoc { get; set; }
  public virtual Int32 DisplayOrder { get; set; }
  public virtual Boolean IsRetentionEnabled { get; set; }
  public virtual Int32 SpecialType { get; set; }
}

public IEnumerable<IRTab> GetAllTabs()
{
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/Tab");
  SetHeaders(webRequest, "GET", null);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  IEnumerable<IRTab> objItems =
JsonConvert.DeserializeObject<IEnumerable<IRTab>>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  return objItems;
}
```

Get a Subset of Tabs

Request Type	URL
GET	http://[Servername]:[Port ID]/api/Tab?itemtypefilter=[picklist|topshelfuser]

Implementation Notes

Gets data describing specified Gimmal Physical Tabs

Input Parameter Type

URL Query String

Input Parameter Format

The itemtypefilter parameter will be either “picklist” or “topshelfuser.” Picklist: return tabs that are requestable and may be contained by another tab topshelfuser: return tabs that are top level, user, or a shelf.

Returns

• An IRTab array with fields described in Response Class below

Response Content Type

Application/json

Response Class

IRTab

Property	Type	Description
Id	Integer (optional)	ID of tab.
singularName	String (optional)	Singular name for tab.

Property	Type	Description
pluralName	String (optional)	Plural name for tab.
isMoveable	Boolean (optional)	Tab is moveable.
isRequestable	Boolean (optional)	Tab can be requested.
autoGenerateBarcode	Boolean (optional)	Tab has barcode auto-generated.
isBarcodeRequired	Boolean (optional)	Whether barcode is required. if not, probably logical tab.
barcodePrefix	String (optional)	Prefix for barcode.
barcodeLength	Integer (optional)	Length for barcode.
isEdoc	Boolean (optional)	Tab is edoc.
displayOrder	Integer (optional)	Display order.
isRetentionEnabled	Boolean (optional)	Tab uses retention.
specialType	Integer (optional)	Special type.

Sample Code

```
// ****************************************************************************
// * Tab - Get filtered Tabs
// ****************************************************************************

public partial class IRTab
{
  public virtual Int32 Id { get; set; }
  public virtual String SingularName { get; set; }
  public virtual String PluralName { get; set; }
  public virtual Boolean IsMoveable { get; set; }
  public virtual Boolean IsRequestable { get; set; }
  public virtual Boolean AutoGenerateBarcode { get; set; }
  public virtual Boolean IsBarcodeRequired { get; set; }
  public virtual String BarcodePrefix { get; set; }
  public virtual Int32 BarcodeLength { get; set; }
  public virtual Boolean IsEdoc { get; set; }
  public virtual Int32 DisplayOrder { get; set; }
```

```
    public virtual Boolean IsRetentionEnabled { get; set; }
    public virtual Int32 SpecialType { get; set; }
  }

  // w is a string containing the http://[Servername]:[Port ID] part of the URL

  public IEnumerable<IRTab> GetFilteredTabs()
  {
    var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/tab?
  itemtypefilter=topshelfuser");
    SetHeaders(webRequest, "GET", null);
    var webResponse = (HttpWebResponse)webRequest.GetResponse();
    StreamReader sr = new StreamReader(webResponse.GetResponseStream());
    IEnumerable<IRTab> objTabs =
  JsonConvert.DeserializeObject<IEnumerable<IRTab>>(sr.ReadToEnd());
    sr.Close();
    webResponse.Close();
    return objTabs;
  }
```

Get a single Tab by Tab ID

Request Type	URL
GET	http://[Servername]:[Port ID]/api/Tab/[ID]

Implementation Notes

Gets data describing a single specified Gimmal Physical Tab.

Accepts Inputs

• Integer Tab ID.

Input Parameter Type

URL

Returns

• An IRTab object with fields described in Response Class below.

Response Content Type

Application/json

Response Class

IRTab

Property	Type	Description
Id	Integer (optional)	ID of tab.
singularName	String (optional)	Singular name for tab.
pluralName	String (optional)	Plural name for tab.
isMoveable	Boolean (optional)	Tab is moveable.
isRequestable	Boolean (optional)	Tab can be requested.
autoGenerateBarcode	Boolean (optional)	Tab has barcode auto-generated.
isBarcodeRequired	Boolean (optional)	Whether barcode is required. if not, probably logical tab.
barcodePrefix	String (optional)	Prefix for barcode.
barcodeLength	Integer (optional)	Length for barcode.
isEdoc	Boolean (optional)	Tab is edoc.
displayOrder	Integer (optional)	Display order.
isRetentionEnabled	Boolean (optional)	Tab uses retention.
specialType	Integer (optional)	Special type.

Sample Code

```
// ***********************************************************************************
// * Tab - Get a single Tab by its ID
// ***********************************************************************************

public partial class IRTab
{
```

```
    public virtual Int32 Id { get; set; }
    public virtual String SingularName { get; set; }
    public virtual String PluralName { get; set; }
    public virtual Boolean IsMoveable { get; set; }
    public virtual Boolean IsRequestable { get; set; }
    public virtual Boolean AutoGenerateBarcode { get; set; }
    public virtual Boolean IsBarcodeRequired { get; set; }
    public virtual String BarcodePrefix { get; set; }
    public virtual Int32 BarcodeLength { get; set; }
    public virtual Boolean IsEdoc { get; set; }
    public virtual Int32 DisplayOrder { get; set; }
    public virtual Boolean IsRetentionEnabled { get; set; }
    public virtual Int32 SpecialType { get; set; }
  }

  // w is a string containing the http://[Servername]:[Port ID] part of the URL
  // 201 is the ID for a particular Tab

  public IRTab GetTab()
  {
    var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/tab/201");
    SetHeaders(webRequest, "GET", null);
    var webResponse = (HttpWebResponse)webRequest.GetResponse();
    StreamReader sr = new StreamReader(webResponse.GetResponseStream());
    IRTab objTab = JsonConvert.DeserializeObject<IRTab>(sr.ReadToEnd());
    sr.Close();
    webResponse.Close();
    return objTab;
  }
```

4.6.1.5.4.12 Test

To test connection with Gimmal Physical Web Services

Request Type	URL
GET	http://[Servername]:[Port ID]/api/Test

Implementation Notes

Tests connection with Gimmal Web Services. Does not require authentication.

Accepts Inputs

Nothing

Input Parameter Type

None

Returns

• A successful test returns a string containing “Successfully connected to InfolinxRest”

Note: Infolinx is the former name for Gimmal Physical and can be found in certain methods and documentation.

Response Content Type

Application/json

Response Class

String

Sample Code

```
// ******************************************************************************
// * Test - Test connection with Gimmal Physical Web Services. Authentication not
needed.
// ******************************************************************************

// w is a string containing the http://[Servername]:[Port ID] part of the URL
// A successful test returns string "Successfully connected to InfolinxRest"

public string Test()
{
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/Test");
  SetHeaders(webRequest, "GET", null);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  string testResponse = JsonConvert.DeserializeObject<string>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  return testResponse;
}
```

4.6.1.5.4.13 Transfer

To Transfer a group of Items to a new containing Item (location)

Request Type	URL
POST	http://[Servername]:[Port ID]/api/Transfer

Implementation Notes

Transfers specified Gimmal Physical items to the given location

Accepts Inputs

• String containing the Barcode of the Location to which Items should be transferred.

• String array containing the Barcodes of the Items to be transferred.

Input Parameter Type

Application/json body

Input Parameter Class

IRTransfer

Property	Type	Description
location	String	Barcode of location to transfer to.
items	Array[string]	List of item barcodes to transfer.

Returns

An IRItemResultList with a Message, Result, and a repeating list of IRItemResults containing the actual success of each item.

Response Content Type

Application/json

Response Class

- IRItemResultList

Property	Type	Description
message	String (optional)	Overall result string for the list.
result	Boolean (optional)	True if all succeeded, false if any failed.
itemResults	Array[IRItemResult] (optional)	The list of individual item results.

- IRItemResult

Property	Type	Description
locationBarcode	String (optional)	Location barcode if applicable for the action.
locationDescription	String (optional)	Location QD if applicable for the action.
itemId	Integer (optional)	ID of item.
itemBarcode	String (optional)	Barcode of item.
itemDescription	String (optional)	QuickDescription of item.
requestId	Integer (optional)	ID of request (if this was a request).
result	Boolean (optional)	Successful or not.
reason	Integer (optional)	Corresponds to some enum for harcoded results.
message	String (optional)	May contain some extra info about why this failed.

Sample Code

```
// ********************************************************************************
// * Transfer - Transfer Items to a new containing Item (location)
// ********************************************************************************

public partial class IRTransfer
{
  public virtual String Location { get; set; }
```

```
  public virtual String[] Items { get; set; }
}

public partial class IRItemResultList
{
  public virtual String Message { get; set; }
  public virtual bool Result { get; set; }
  public virtual IRItemResult[] ItemResults { get; set; }
}

public partial class IRItemResult
{
  public virtual String LocationBarcode { get; set; }
  public virtual String LocationDescription { get; set; }
  public virtual Int32 ItemId { get; set; }
  public virtual String ItemBarcode { get; set; }
  public virtual String ItemDescription { get; set; }
  public virtual Int32 RequestId { get; set; }
  public virtual bool Result { get; set; }
  public virtual Int32 Reason { get; set; }
  public virtual String Message { get; set; }
}

// w is a string containing the http://[Servername]:[Port ID] part of the URL
// 0000010265 is the barcode of the user to whom the Items are being transferred
// 0000011667 and 0000017757 are the barcodes of the items being transferred

public IRItemResultList doTransfer()
{
  IRTransfer t = new IRTransfer();
  t.Location = "0000010265"; // Barcode of Location or User to which Items should be
transfered
  t.Items = new string[] {"0000011667", "0000017757"}; // Array of Barcodes of Items to
be transfered
  string body = JsonConvert.SerializeObject(t);
  var webRequest = (HttpWebRequest)WebRequest.Create(w + "/api/transfer");
  SetHeaders(webRequest, "POST", body);
  var webResponse = (HttpWebResponse)webRequest.GetResponse();
  StreamReader sr = new StreamReader(webResponse.GetResponseStream());
  IRItemResultList objItems =
  JsonConvert.DeserializeObject<IRItemResultList>(sr.ReadToEnd());
  sr.Close();
  webResponse.Close();
  webResponse = null;
  return objItems;
}
```

4.6.1.5.4.14 Get Error Log File

Get error log from import process

Request Type	URL
POST	http://[Servername]:[Port ID]/api/GetLogErrorFile

Implementation Notes

Method returns an IRIO item. Set the maximum file transfer size, file name and extension and count of bytes received before calling this method.

Response Content Type

Application/json

Response Class

IRIO

Property	Type	Description
results	String (optional)	
fileName	String (optional)	
extension	String (optional)	
counterOfBytesReceived	Integer (optional)	
totalFileLength	Integer (optional)	
fileLocationType	String (optional)	'Edoc' or 'Interchange' or 'Label' or 'Report'.
buffer	Array[string] (optional)	
maxFileTransferSize	Integer (optional)	
filePath	String (optional)	
barcodeString	String (optional)	

Returns

• An IRIO object

Sample Code:

```
public class IRIO
{
  public string Results { get; set; }
  public string FileName { get; set; }
  public string Extension { get; set; }
  public int Position { get; set; }
  public int CountOfBytesReceived { get; set; }
  public long TotalFileLength { get; set; }
  public bool NewFile { get; set; }
  public FileLocation FileLocationType { get; set; }
  public enum FileLocation
  {
    Edoc = 1,
    Interchange = 2,
    Label = 3,
    Report = 4
  }
  public long MaxFileTransferSize { get; set; }
  public string FilePath { get; set; }
  public bool Complete { get; set; }
  public byte[] buffer { get; set; }
}

public static async Task<IRIO> GetFileInChunks(IRIO objIO)
{
  var handler = new HttpClientHandler
  {
    Proxy = WebRequest.GetSystemWebProxy(),
    UseProxy = true
  };
  using (var client = new IRIOClient(handler,InfolinxRestBaseAddress))
  {
    SetupHttpClient(client.HttpClient, UserName, Password);
    var response = await client.GetAsyncInChunks(objIO);
    response.EnsureSuccessStatusCode();
    IRIO results = await response.Content.ReadAsAsync<IRIO>().ConfigureAwait(true);
    return results;
  }
}

IO.MaxFileTransferSize = this._FileSizeToTransfer != 0 ?
Convert.ToInt64(this._FileSizeToTransfer) : 2097152; //default to 2MB if no size given
IO.FileName = strFileName;
IO.Extension = strExtension;
IO.CountOfBytesReceived = 0
IRIO Ret = await InfolinxRestProxy.GetFileInChunks(IO);
if (Ret.FileName.Length > 0)
{
```

```
    long lngReturnedLength = Convert.ToInt64(Ret.buffer.Length);
    IO.CountOfBytesReceived = Ret.CountOfBytesReceived;
    while (Ret.TotalFileLength >= lngReturnedLength)
    {
      Stream stream = new MemoryStream(Ret.buffer);
      using (System.IO.FileStream output = new System.IO.FileStream(processedFilesDir +
  Ret.FileName, FileMode.Append))
      {
        stream.CopyTo(output);
      }
      if (Ret.TotalFileLength > lngReturnedLength)
      {
        Ret = await InfolinxRestProxy.GetFileInChunks(IO);
        IO.CountOfBytesReceived += Ret.CountOfBytesReceived;
        lngReturnedLength += Convert.ToInt64(Ret.buffer.Length);
      }
      else
      {
        this.LogAndErrorFileRetrieved = true;
        break;
      }
    }
  }
```

4.6.1.5.4.15 Send Chunks

Request Type	URL
POST	http://[Servername]:[Port ID]/api/SendChunks

Implementation Notes

Method returns an IRIO item. Set the file name buffer size, file location, new file boolean and starting position before calling this method.

Response Content Type

Application/json

Response Class

IRIO

Property	Type	Description
results	String (optional)	

Property	Type	Description
fileName	String (optional)	
extension	String (optional)	
counterOfBytesReceived	Integer (optional)	
totalFileLength	Integer (optional)	
fileLocationType	String (optional)	'Edoc' or 'Interchange' or 'Label' or 'Report'.
buffer	Array[string] (optional)	
maxFileTransferSize	Integer (optional)	
filePath	String (optional)	
barcodeString	String (optional)	

Sample Code:

```
public async static Task<IRIO> PostAsyncInChuncks(IRIO objIO)
{
  var handler = new HttpClientHandler
  {
    Proxy = WebRequest.GetSystemWebProxy(),
    UseProxy = true
  };
  using (var client = new IRIOClient(handler,InfolinxRestBaseAddress))
  {
    SetupHttpClient(client.HttpClient,UserName,Password);
    var response = await client.PostAsyncInChuncks(objIO);
    response.EnsureSuccessStatusCode();
    return await response.Content.ReadAsAsync<IRIO>();
  }
}

public async Task<HttpResponseMessage> PostAsyncInChuncks(IRIO objIO)
{
  return await HttpClient.PostAsJsonAsync<IRIO>("api/sendChunks",
objIO).ConfigureAwait(false);
}

public async Task<string> TextFileUpload()
```

```
{
  FileStream fs = null;
  string uploadedFileName = "";
  try
  {
    fs = File.OpenRead(this._fileNameAndPath);
    long lngTransferSize = fs.Length
    fs.Close();
    fs.Dispose();
    long maxTransferSize = 2097152; //2 MB
    if (this._FileSizeToTransfer > 0)
    {
      maxTransferSize = this._FileSizeToTransfer;
    }
    if (maxTransferSize > lngTransferSize)
    {
      maxTransferSize = lngTransferSize;
    }
    byte[] buffer = new byte[maxTransferSize];
    int len;
    InfolinxRestProxy.InfolinxRestBaseAddress = this._InfolinxRestBaseAddress;
    InfolinxRestProxy.UserName = this._UserName;
    InfolinxRestProxy.Password = this._Password;
    IRIO IO = new IRIO();
    IO.FileName = this._fileName;
    IO.buffer = buffer;
    IO.FileLocationType = IRIO.FileLocation.Interchange;
    IO.Position = 0;
    IO.NewFile = true;
    int Offset = 0;
    using (FileStream f = new FileStream(this._fileNameAndPath, FileMode.Open,
FileAccess.Read))
    {
      try
      {
        f.Position = Offset;
        int BytesRead = 0;
        while (Offset != f.Length)
        {
          BytesRead = f.Read(buffer, 0, buffer.Length);
          if (BytesRead != buffer.Length)
          {
            maxTransferSize = BytesRead;
            byte[] TrimmedBuffer = new byte[BytesRead];
            Array.Copy(buffer, TrimmedBuffer, BytesRead);
            buffer = TrimmedBuffer;
            IO.buffer = buffer;
          }
          IRIO Ret = await InfolinxRestProxy.PostFileInChuncks(IO);
          IO.FileName = Ret.FileName;
          IO.NewFile = false;
          Offset += BytesRead;
        }
      }
      catch (Exception ex)
      {
```

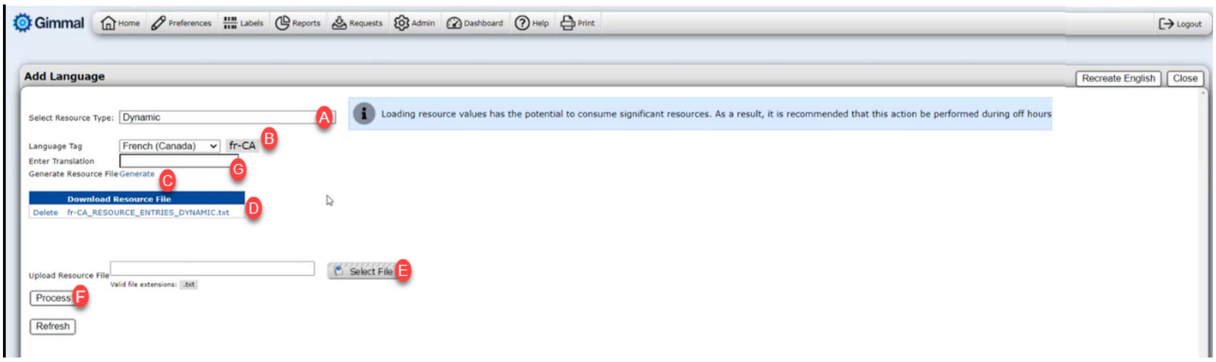
```
            Notifications.NotificationService.WriteToEventLog("Error uploading import file
" + ex.ToString(), EventLogEntryType.Error, this._session);
          }
        }
        uploadedFileName = IO.FileName;
      }
      catch (Exception EX)
      {
        this.OnExceptionOccurred(EX);
        return EX.ToString();
      }
      finally
      {
        if (fs != null)
        {
          fs.Dispose();
        }
      }
      return uploadedFileName;
    }
```

Please contact Gimmal Support[108] with any questions.

4.6.1.5.5 (Legacy Help) Creating Resource Language Files

The language used by the Gimmal Physical interface is US-English by default. However, the application contains options that allow Administrators to change the text values of the application to a different language. The new language preference can then be set on a per-user basis. This is done by taking the resource file for all labels, translating the files from English to the chosen language, and then adding that option to the application. Please see the steps below on how to enable these options.

> ⚠ Please read through all the directions and double-check your translations before making any changes. Once the languages are added to the application, it is very difficult to change the values.



1. Navigate to Admin | Resource Files

108. mailto:support@gimmal.com

2. Click on 'Create Resource '. This opens the 'Add Language' Page.
3. Select an option from 'Select Resource Type' to choose which file you would like to create (A). Note: Both files are needed for a full translation to be accomplished.
   a. Dynamic: Fields that have been added to or adjusted in the application (Tabs, column names, etc.)
   b. Static: Always present: Upper-level menus, fixed labels, can't be configured/adjusted.
4. Select a language from the drop-down 'Language Tag'(B).
   Note: If your language code is not found in the list, please contact technical support at support@gimmal.com[109] for details.
5. Choose a name for the type of translation (e.g. French Canadian) that will appear in the drop-down list on the Preferences page. (G)
6. Click the 'Generate' link to create the selected file. (C)
   Note: This creates a pre-translation resource file that will be listed in the 'Download Resource File' list.
7. Click on the listed file to download it from the 'Download Resource File' section. (D)
8. Open the file in a compatible program. There will be four pipe-delimited columns:
   a. Language Prefix: The language selected in the drop-down field (B)
   b. Source: Table where the value is used.
   c. Key: Name of the 'field' for the listed value
   d. Value: Text that appears in the UI.
      NOTE: **Only** the Value field should be changed.
9. Update the values in the fourth column to the same text in your preferred language.
   Note:
   a. There are a large number of fields to edit, so this may take some time
   b. Some of the values may be blank. These fields do not need to have any text.
   c. Do NOT change any of the generated values in the first three columns.
10. When translations are complete, make sure the changes have been verified and saved.
    Note: It is very difficult to undo a resource file update. Please double-check check all values are translated appropriately before continuing.
11. Click the 'Select File' in the 'Upload Resource File' section and choose the updated file. (E)
12. Click 'Process' to add the new translation to the application. (F)
13. Repeat the process for each file (Dynamic and Static) for each language that needs to be added.
14. Once a new language has been added to the application, a new preference will appear in the Preferences | Application page per user.
15. For the 'Selected language for application' option, choose the new language from the drop-down box. The names that appear in the drop-down are chosen by the value (G) on the 'Add Language' page.
    Note: The scope cannot be changed from 'User'.

109. mailto:support@gimmal.com

16. Choose 'Set as Default' ***only*** if you wish the language selected to be defaulted for everyone who logs in, replacing the default American English. Individual users would then need to navigate to their preferences page to set it back.
17. Click ‘Save Changes’.
18. When using SSO, the application will use the values in the new language at the next log-in. If you are using 'Forms' login, you can choose the language on the login page.

Helpful Tips:

- The export files are pipe delimited. The values (fourth column) can be edited in Excel or Notepad.
- Many values are repeated, so judicious use of ‘Find and Replace’ may prove helpful.
- Save a copy of the old resource file before commencing the update for use as a backup and reference.

4.6.1.5.6 (Legacy Help) Technical Specifications - Iron Mountain Connector

The Iron Mountain connector facilitates the transfer of requests for delivery and pickup of boxes or files between Gimmal Physical and Iron Mountain data centers.

Additional information regarding setting up and using the Iron Mountain Connector can be found here[110].

4.6.1.5.6.1 File Creation

When requests are submitted to the Iron Mountain sftp site a files with a .ord extension for pickups or deliveries and .add extension for additions are created and posted to the Iron Mountain site. Data to create these files is constructed using the following:

Pickup or delivery files (.ord) – Header Information

Gimmal Physical Source	Iron Mountain Reference
Customer ID (On Customer tab)	CustID
District ID (On Customer tab)	DistID

110. https://docs.gimmal.com/gp/user-guide-for-iron-mountain-integration

Address Information (Transit Information tab). If Ship To Code is present it is used instead of address information.	Ship to address information

Pickup or delivery files (.add) – column mapping for Boxes.

Note: For the most part these fields can be empty as this data is now captured and managed in Gimmal Physical.

Gimmal Physical Source	Iron Mountain Reference
Customer ID	CustomerNumber
Box Number (if empty then Barcode will be used)	SkpBoxNumber
Barcode	CustomerBoxNumber
Department ID	DepartmentId
Record Code	RecordCode
Date From	FromDate
Date To	ToDate
Major Description	MajorDescription
Minor Description	MinorDescription
Scheduled Destruction Date	DestructionDate
Destruction Indicator (defaults to U)	DestructionIndicator
Long Description 1	LongDescription1
Long Description 2	LongDescription2
Long Description 3	LongDescription3

Long Description 4	LongDescription4
Long Description 5	LongDescription5
Long Description 6	LongDescription6
Long Description 7	LongDescription7
Long Description 8	LongDescription8
Extra 1	Extra1
Extra 2	Extra2
Division ID	DivisionId
Create Date (the boxes create date)	CreateDate
Event Date	EventDate
Reference 1	Reference1
Box Hold Code	BoxHoldCode

Pickup or delivery files (.add) – Item Information (Files)

Gimmal Physical Source	Iron Mountain Reference
Customer ID	CustomerNumber
Box Number (if empty then Barcode will be used)	SkpBoxNumber
Barcode	CustomerBoxNumber
Department ID	DepartmentId
Record Code	RecordCode

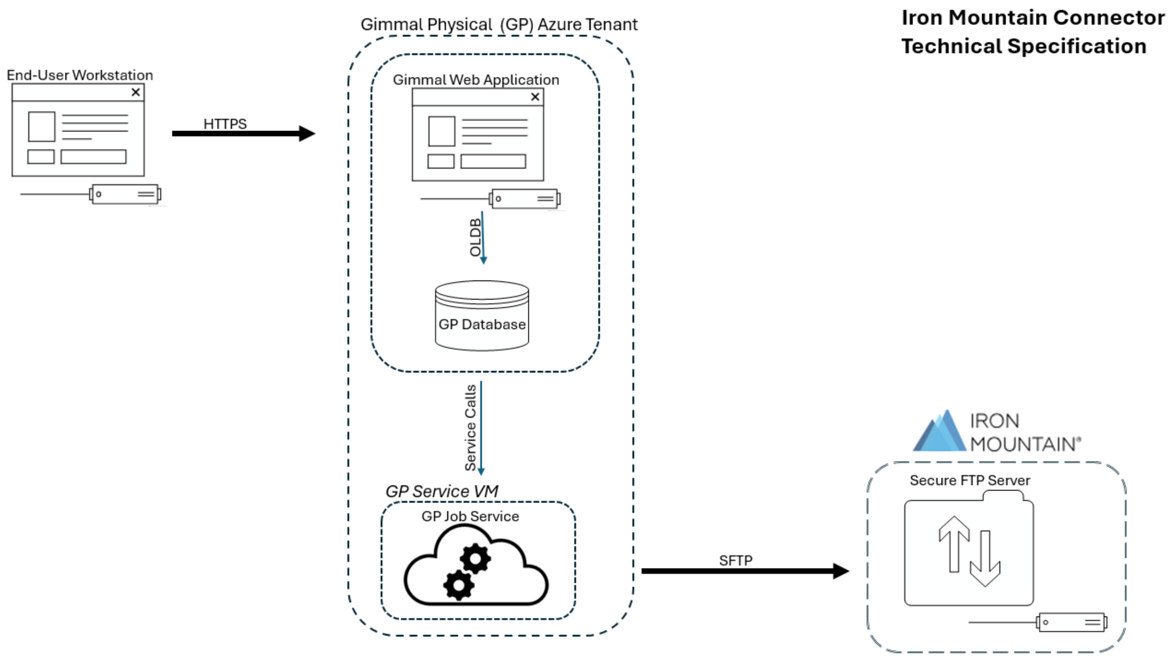
Date From	FromDate
Date To	ToDate
File Desc 1	FileDescription1
File Desc 2	FileDescription2
Extra 1	Extra1
Extra 2	Extra2
Third Party ID	ThirdPartyId
Division ID	DivisionId
File Description 3	FileDescription3
File Description 4	FileDescription4
Create Date (the files create date)	CreateDate
Birth Date	BirthDate
Discharge Date	DischargeDate
Social Security Number	SocialSecurityNumber
Volume Number	VolumeNumber
Unique Barcode	UniqueBarcode
Customer Barcode	CustBarcode
File Description 5	FileDescription5
File Description 6	FileDescription6
File Description 7	FileDescription7

File Description 8	FileDescription8
File Description 9	FileDescription9
Type	Type

4.6.1.5.6.2 Data Flow

End-users start the data flow process by submitting requests into Gimmal Physical using a web browser on a workstation. Based on the submitted request, Gimmal Physical job services will read the database to create and prepare the appropriate files to be transmitted. The files are transferred via Secure FTP protocol and saved on a secure Iron Mountain FTP site using dedicated credentials managed by Iron Mountain and the customer. Iron Mountain's SafeKeeper system processes these files to initiate transactions with their Record Centers.

Data flow for the Iron Mountain Connector is one-way.



4.6.2 (Legacy Help) Tutorials

A number of interactive video tutorials are available to demonstrate common features for Gimmal Physical. They can be found at the links below:

1. Interface Overview[111]
2. Importing Data[112]

3. Creating Users[113]
4. Create & Update Records[114]
5. Printing Labels[115]
6. Search Options[116]
7. Reporting[117]
8. Requesting[118]
9. Transferring[119]
10. Security[120]
11. Disposition[121]

4.6.3 (Legacy Help) Release Notes

Please use the tree view to select the version of Gimmal Physical and review the changes , enhancements and issues addressed for each release as noted in the original pre-4.0 changes.

111. https://gimmal.navattic.com/cp106bd
112. https://gimmal.navattic.com/w910fdc
113. https://gimmal.navattic.com/oy20a9r
114. https://gimmal.navattic.com/iv10i5j
115. https://gimmal.navattic.com/ql108di
116. https://gimmal.navattic.com/yo201gc
117. https://gimmal.navattic.com/nu20au5
118. https://gimmal.navattic.com/gl10s6b
119. https://gimmal.navattic.com/hf10r69
120. https://gimmal.navattic.com/1u20k7y
121. https://gimmal.navattic.com/sa903wg

4.6.3.1 Note

> Enabling certain new features may require fee-based professional services for advanced configuration and/or data transformations

4.6.3.2 (Legacy Help) Release Notes 3.15.2

4.6.3.2.1 Bug Fixes

ID	Description	Ticket #
96606	Pattern Sequence reusing numbers above 100 items	00023149
96671	Duplicate Item history in certain circumstances	00023058
96670	Direct URL with SSO returns to login screen	00023198

4.6.3.2.2 General Availability

11/12/24

4.6.3.3 (Legacy Help) Release Notes PortableConnect for Android 13 or 14

4.6.3.3.1 New Features

4.6.3.3.1.1 PortableConnect

The PortableConnect utility for use with Zebra TC5x scanners can now support Android 13 or Android 14.

4.6.3.3.2 Known Issues

ID	Description
	Neither RFID or Bluetooth is supported in this version.

4.6.3.3.3 General Availability

October 22, 2024

4.6.3.4 (Legacy Help) Release Notes 3.15.1

4.6.3.4.1 New Features

4.6.3.4.1.1 Request Page Updates

Improvements have been added to the Request Pages including:

- Added a 'Query Request on Home Page' button. This helps users verify the property of the records with the additional detail found on the Home Page Grid.
- Streamlining the Request Page Quick Search and making it consistent with the column headers for more effective searching.
- Interface updates include:
  - Adding a setting to determine the number of rows for pagination
  - Removing unneeded links
  - Update style for 'View Request History'

4.6.3.4.1.2 Refile Request Updates

The page for requesting pick-ups and deliveries has been improved to allow more fine-tuned control over individual items. Enhancements include:

- Adding support for multiple concurrent storage vendors including on-prem, Iron Mountain, and O'Neil based Record Centers
- Add options to apply location changes to selected or all items
- Warnings added to the destinations changing from one type to another (e.g. off-site to on-prem)

4.6.3.4.2 Product Enhancements

> Features listed in this section may require fee-based professional services for advanced configuration and/or data transformations.

4.6.3.4.2.1 Improved O'Neil Connector

A new and improved O'Neil Connector will allow Gimmal Physical a direct connection to O'Neil's Bridge Rest API. By automating the request and reconciliation process with Record Centers that support O'Neil Bridge, Records Managers will eliminate double work and maintain a single system of record. With the correct credentials, Metadata and transit information are synced with the Record Centers. Transfers are processed instantly and the status of the work orders is updated automatically.

4.6.3.4.2.2 Updates to Iron Mountain Integration

A series of improvements have been added to the Iron Mountain configuration, request, and transfer pages.

4.6.3.4.3 Bug Fixes

ID	Description	Ticket #
87577	Long column names combined with a large number of column fields (>3,000 characters) cause searches to fail	00018928
87612	Previous history table entry incorrectly duplicated when the subsequent reason for the change is not required	00018853
91698	Pickup Format for the Iron Mountain file is incorrect	00020847
90958	Permissions for the Submit button (connector-based Requests) not enabled	00020638
82183	Excessive field names (>1024 characters) cause export failure	00016692
94889	Multi-field updates not stored in Audit History	00022276
87454	Item History descriptions are not set until the history is viewed	00018707
84990	Current Container Quick Description update lag with dynamic changes	00017235
94423 /94580	FileConnect: Auto-import issues with service error preventing import	00022080 / 00022060
95184	Billing for storage does not take into account the previous year's data	
93605	Circulation History invalid when security right removed	
93819 / 92631 /93617	End-of-month invoice data records are not being created in certain circumstances	00021709
94572	Bulk Create throws an error when an INT field is on the page	00022185
95525	Unique fields do not appear on the Bulk Update page if multiple fields are used	00020689

4.6.3.4.4 Known Issues

ID	Description
91349	Links for 'Create a New File for' and 'Create a New Box for' are missing on 'View Records Schedule' if opened from the 'View > Record' menu selections

4.6.3.4.5 Removals

ID	Description
93707	Remove obsolete View Request Reconciliation option from view requests pages

4.6.3.4.6 General Availability

July 29, 2024

4.6.3.4.7 (Legacy Help) Release Notes 3.15.1 Hotfixes

Pease contact the Gimmal Support team for access to the hotfix.

4.6.3.4.7.1 Bug Fixes

ID	Description	Ticket #	Available Date
101702	Issues with Azure On-Prem	0002461 3	3/7/2025
98063	Detailed Search Error when OSV is queried	0002378 1	12/12/2024
98067/ 98585	Iron Mountain Issues	0002378 4	12/12/2024
98425	Iron Mountain page is not displaying saved ftp address	0002389 3	12/12/0224
98214	Barcode length and Account code issue (O'Neil)		12/12/2024
97931/97838/ 98366/97937	O'Neil deployment issues	0002367 7	12/12/2024

ID	Description	Ticket #	Available Date
97244	Issues with Conditional Field display filter on imports	0002346 6	10/29/24

4.6.3.5 (Legacy Help) Release Notes 3.15

4.6.3.5.1 New Features

4.6.3.5.1.1 Portable Transfer Improvements

Several enhancements have been added to optimize data transfers from portable barcode scanners. These include:

- Optional rules for processing barcodes, including:
  - Removing or adding prefixes or suffixes
  - Replacement of unwanted characters
  - Limit barcode length
- Performance and logging improvements
- Options for preview and analysis of files before transfer
- Email notification and summary of completed transfers
- Ignore the transfer of items that have been deleted

4.6.3.5.1.2 Circulation History

This new version of Gimmal Physical has added options to manually log and audit additional steps in the process of routing a transferred item to or from its final destination. When enabled, this new record consists of a user-updated entry appended to the transfer which is then stamped with key details. These entries are included in the item history for auditing purposes.

4.6.3.5.1.3 Synonym Searching Options*

This feature is useful for finding key pieces of data that have alternate designations. For example, you may have problems finding a product known by multiple names in different regions or if you have a locality name that is often shortened or abbreviated. Synonyms help resolve this issue by returning each of the variants when searching for one. The list of alternative terms is designated and controlled by your team as either a separate tab or a list of values.

4.6.3.5.1.4 Pattern Sequences*

This new option automatically creates a field for a newly created item based on the values of other fields and a pre-defined sequence. For example, you can use this new Pattern Sequence to create a box name that includes an organization code and a sequential number. It even allows you to have a separate sequence for different organizations.

4.6.3.5.1.5 Many to Many Controls Enhancements*

Features have been added to extend functionality to ‘Many to Many’ controls which were previously unavailable. The ‘Many to Many’ controls allow users to select and modify data where fields have a many-to-many relationship. Examples include assigning multiple boxes to multiple organizations (also users or departments from either the boxes or organizations tab.

- **Add Carryforward Options**
  This functionality extends to the many-to-many controls and the ability to use fields in a selected record as the basis for the default values in any new record subsequently created.
- **Mirrored Searches**
  This enhancement allows the searching of records from either tab (e.g. boxes or organizations) that contains the relationship for the many-to-many control.
- **Mirrored View, Add, Update, and Remove functionality**
  From either tab in a many-to-many control relationship, and with the correct permissions, users can now perform any CRUD operation from either tab linking the records.
- **Export Many to Many fields controls**
  Values stored in many-to-many relationships can now be exported in a format that matches the import options.

4.6.3.5.1.6 Actual Destruction Date Improvements

Multiple enhancements have been added to expand the functionality of Actual Destruction Dates. This date will now appear on the Certificate of Destruction, and user-entered Actual Destruction is supported with several options to address the most common use cases.

4.6.3.5.1.7 Choice for Scheduled Destruction Date Processing*

Administrators now have the option to calculate disposition dates dynamically or as a nightly job service. If enabled, this option can prevent timeouts when processing large sets of data.

4.6.3.5.1.8 UI Improvements*

- **Reorganize Admin Page**
  The administration page has been reorganized into logical groups to make finding options more efficient.
- **Session Clock**
  An option is now available that allows users to see how much time is left before their current session expires.
- **Concatenated Text Box***
  This feature was added to make it easier to view and search fields where multiple values can be selected.
- **New Cart Options**
  The ‘Add to Cart’ feature has been expanded by allowing users to add an entire set of results to the cart rather than needing to go page by page.

- **Additional Action Button Options**
  Users can now leverage the 'Configure Action Toolbar' to hide action buttons or change most action button captions.
- **CSV as Export Option**
  The home page grid exports now allow a choice between .txt and .csv export formats.

4.6.3.5.1.9 Background Jobs Table Management

An option has been added to the Application Settings to regulate the number of days entries are kept in the Background Jobs history table. The default is now 30 days, but this can be adjusted or disabled. Clearing out the background jobs history table regularly will help to improve performance for actions that take place as part of a background service.

4.6.3.5.2 Bug Fixes

ID	Description
88795	Date format issue on Export (00019612)
89098	Iron Mountain Box Request Pickup issue(00019723)
89049	Iron Mountain multiple request headers (00020049)
90229	Errors updating electronic documents (00020206)
89782	Error in conditional field display with removed value (00019973)
90722	Records Schedule Organizational Control not using carry-over values (00020377)
90908	Issue when disposition items not referencing records table (00020483)
91207	SQL Timeout issues with Billing (00020785)
91281	Invalid box size constraint (00020897)
90722	Carryover value not used for Organizational Control on Record Schedule (00020377)
90983	Addressed an issue with extra columns in Space Management
90063	Application Log load errors with certain configurations

ID	Description
90568	Bulk update issue when changing Laserfiche folder
89996	Invalid headers showing for non-licensed component
91658	Installer validation issues
91386	Missing confirmation page for Iron Mountain

4.6.3.5.3 Known Issues

ID	Description
96061	Installer Error with automatic DB Creation when non-standard regional dates are used.

4.6.3.5.4 General Availability

April 29th 2024

4.6.3.5.5 Note

This document refers to a version currently under development. Details will change as more information becomes available.

> *Enabling certain features may require advanced configuration in conjunction with fee-based professional services.

4.6.3.6 (Legacy Help) Release Notes 3.14

4.6.3.6.1 New Features

4.6.3.6.1.1 Disposition Enhancements

- **Retention Schedule Scope**
  Administrators can now configure the scope of a retention schedule to limit or expand access based on the chosen hierarchical organizational level.

4.6.3.6.1.2 Additional Actions

- **Permanent Withdrawal**
  New options for Permanent Withdrawal and Permanent Withdrawal and Delete have been added to the Alternate Fulfilment Method to allow items to be permanently moved (i.e. deaccessioned) outside the system of record.
- **Bulk Create**
  This feature assists in creating multiple records at once by maintaining identical default details over a configurable number of new records while giving each a new barcode.

> **Note**: Automatic barcode creation must be enabled in Gimmal Physical for this feature to function correctly.

- **Box Lockdown**
  An optional setting has been added, allowing boxes to be locked down when transferred to a hub location. This helps to prevent unwanted changes to an item when it is in a location that is designated as a hub.

4.6.3.6.1.3 Billing Improvements

A number of options have been added to better support organizations that charge for storage.

- **Hierarchical Billing**
  For customers who have multi-level organizations, charges can now be aggregated at various levels of the hierarchy, allowing you to pinpoint the level of the organization that should be billed.
- **Assessment of Storage Charges**
  This option gives administrators more control over billing by offering a choice to track items stored in hub locations on a daily or monthly cadence. This adds precision to analyzing, invoicing, and reporting of charges.

4.6.3.6.1.4 Search Options

- **Find Empty Containers**
  Options have been added to the Advanced Query screen for container items (e.g. boxes, shelves) which allow users to query for empty items. This includes those that have no associated content, those with checked-out associated content, and those with deleted associated content.

4.6.3.6.1.5 User Interface Updates

- **Updated Help Link**
  Continually updated online documentation and guides can now be directly accessed from the application Help button[122], replacing the static context-specific help.

122. https://docs.gimmal.com/gp/

Administrators can now directly link their own documentation via the Admin Settings page.

- **Increase Records per Page Limit**
  New preference options (200, 500) have been added to the Records per Page limit.
- **Improved Validation for Range Fields**
  To assist with reducing data entry errors, additional checks have been added to range fields to make sure the values entered do not violate range field constraints.
- **Refresh Branding**
  The color scheme and logos have been refreshed to reflect updated Gimmal branding.

4.6.3.6.2 Bug Fixes

ID	Description
85040	Request comments don't handle special characters
87122	Date calculations do not account for deleted files
88098	Add option to avoid Auto SDD file updates issues with certain scenarios (00017425)
82763	Updates to list values not captured fully in Application History (00016656)
87980	Error searching home page grid with no valid data
88381	Caching issues with services (00019295)
88203	Issues with views when organization is not selected (00019120 & 0019122)
87638	Improper restriction of excessive authentication attempts
87124	Logic Error in creation of home page grid view (00018662)
89003	General Record Schedules not showing without User rights to organization (00019672)
88974	Error trying to submit filter requests to Iron Mountain (00019715)

4.6.3.6.3 Known Issues

ID	Description
888329	'Bulk Create' missing from 'Choose Action' list in Notification event.
	To see 'Verbose' logging in the Application Log, the Gimmal Physical Service will need to be restarted.

4.6.3.6.4 Removals

ID	Description
n/a	Range fields will no longer support comma delimited lists as values. For example, a value of ***1-8, 11-19, 22-34*** can no longer be used in a range field.

4.6.3.6.5 General Availability

December 11th 2023

Note: Enabling certain features may require advanced configuration in conjunction with fee-based professional services.

4.6.3.7 (Legacy Help) Release Notes 3.13.2

4.6.3.7.1 New Features

4.6.3.7.1.1 Job Services Updates

The job services for Gimmal Physical have been updated to use alternate logging and retry mechanisms to improve stability of the product.

4.6.3.7.2 Bug Fixes

ID	Description
87159	JobQueue Sender exceptions cause service to stop working (00018585)
86665	Set Defaults button causes loss of sort priority items (00018147)

ID	Description
86666	Cannot update list items if list names contains ‘ID' (00018155)
87008	Export of Item History doesn’t handle CRLF (00018327)
86789	Search Preference not propagating to home page (00018223)
86976	Yesterday, Today and Tomorrow date filter future schedule issues (00018280)

4.6.3.7.3 General Availability

August 11, 2023

4.6.3.8 (Legacy Help) Release Notes 3.13.1

4.6.3.8.1 New Features

4.6.3.8.1.1 Filter Dispositions by Location

This optional feature allows retention batches to be further filtered by location to help make the disposition process more flexible.

4.6.3.8.1.2 Validate and Restrain Date Fields on Import

This optional feature, set at configuration time validates dates against a set of rules for both the UI and Import:

- ‘Date To’ so it cannot be a future date
- ‘Cut-off date’ cannot be less than ‘Date To’
- ‘Date From’ cannot have a value higher than 'Date To.

4.6.3.8.1.3 Import into Many to Many Control

This feature allows users to leverage the quick description to import data into tables where fields have a many-to-many relationship. This expands the importing process to include multiple boxes to organizations, users, departments and more.

4.6.3.8.1.4 Calculate Box Scheduled Destruction Date for Files with Empty Dates

This feature will handle the recalculation of Scheduled Destruction Dates for boxes by setting the box destruction date to remain empty if any file within the box does not have a destruction date. This will work when files are added, updated or removed from a box.

4.6.3.8.1.5 Please Note:

Starting with the 3.13.1 release, Gimmal Physical will only support import files with UTF-8 encoding.

4.6.3.8.2 Bug Fixes

ID	Description
83359	Importing items removes non-English characters in certain conditions (000161722)
83319	Importing not properly reading file encoding type (000161722)
84125	Accession Date update with create at Home Location not working as expected (00016793)
82645	Box transfers done through Bulk Update do not audit the transfer (00016886)
85933/85918	Excel report issues

4.6.3.8.3 Removals

ID	Description
83359	Removed the option "Remove Unprintable Characters" from the Import screen as part of a fix. This functionality will be covered with the requirements for UTF-8 encoding. Any characters not covered under that encoding will force an import error captured in the logs.

4.6.3.8.4 General Availability

June, 26, 2023

4.6.3.9 (Legacy Help) Release Notes 3.13

4.6.3.9.1 New Features

4.6.3.9.1.1 Access Unify Integration

Gimmal Physical now supports automated integration with Access Total Recall system via the Access Unify APIs. This feature will allow customers to use a single system, Gimmal Physical, to request boxes for transfer, delivery or refile stored in an Access warehouse.

4.6.3.9.1.2 Gimmal Records Connector

Gimmal Physical can now interact directly with Gimmal's popular electronic record management system, Gimmal Records. This feature allows record schedules from Gimmal Records to be automatically populated in Gimmal Physical with the click of a single button. It is the start of a seamless integration between the two products.

4.6.3.9.1.3 Record Schedule option: 'Days'

To complement the existing time-based values, new record schedules can now be created using days as a value to calculate scheduled destruction date.

4.6.3.9.1.4 Nightly Report Enhancements

This version improves the ability to schedule reports during off hours, email them to designated users and filter report result sets. It also allows for larger datasets while simplifying deployment and maintenance.

4.6.3.9.1.5 Background Improvements

A number of behind-the-scenes changes are included in this release which are designed to streamline the setup and performance of Gimmal Physical. Although these changes will be mostly transparent to an admin or end-user, these changes improve the stability and performance of the product. Updates include a new installer, reusable data entry pages, a new background service, new index methodology, improved logging and more.

4.6.3.9.2 Bug Fixes

ID	Description
82246	Issue changing password in reset password page with user generated barcodes
82691	Bulk Delete and Bulk Undelete issues with larger (>2000) datasets

4.6.3.9.3 Known Issues

ID	Description
	Upgrades to Gimmal Physical 3.13 must be done from Gimmal Physical version 3.12
85933	Excel Reports will not download (on-prem)
85918	Activity Summary cannot export to Excel

ID	Description
85393	Nightly reports are in UTC, but reports are in local time
83359	Automated import removes some standard non-English characters
83319	Importing not properly reading file encoding type

4.6.3.9.4 General Availability

04/28/2023

4.6.3.10 (Legacy Help) Release Notes 3.12

4.6.3.10.1 New Features

4.6.3.10.1.1 Ability to relate Record Series to many Organizations

When creating or updating Record Series records an association can be made whereby the Record Series is related to many Organizations.

4.6.3.10.1.2 Request functionality enhancement providing the ability to create and request the contents of a container

When performing a request, the user now has the option to create and request contents of the record instead of the record itself.

4.6.3.10.1.3 Report enhancements

Hierarchical location information added to Picklist and Refile reports.

4.6.3.10.1.4 Improved style sheets for Largelist control

Updated cascading style sheets data display in the large list control for a more elegant presentation.

4.6.3.10.1.5 Improved auto-calculation of container Scheduled Disposition Date

Updated logic provides for the setting of the Scheduled Disposition Date on containers based on the contents.

4.6.3.10.1.6 Search page enhancement when conditional fields are present

Fields that are hidden due to conditional field display are now hidden on the Detailed Search page until a selection is made from the list that controls conditional field display.

4.6.3.10.1.7 Single Sign On configuration enhancement

Logic added to the user interface that allows clients to specify what fields of information will be inherited from the sign on authority.

4.6.3.10.1.8 Improve tracking history for large data sets

Logic added to streamline the tracking of multiple items in many to many controls which point to other tabs.

4.6.3.10.2 Bug Fixes

ID	Description
69703	Current and Home location fields were added to the list of available fields in the Duplicate Search page.
69861	Right was added so that Portable Reconcile and Portable Transfer are using the same security right.
70094	Printing the results of a Global Search will now result in the same values being returned as are present in the gird.
70231	Advanced query descriptions issue was fixed where an error could be thrown if the underlying list value or tab value had been deleted.
71069	Cascade updates now update entire query instead of using preference maximum row count.
71769	Hiding a tab in the application when it is related to a tab on which disposition can be run will no longer throw a null reference error.
71807	Fixed issue in Expunging Supply Item Requests.
72323	Issue addressed where calendar controls for secured date fields were visible on data entry pages.
72758	Fixed the issue with setting default values for Current or Home locations on the create page on a tab.
72962	Fixed issue where history record was not written when the values being updated were greater than 4000 characters in length.
73067	Spurious error message related to Organization no longer logged when attempting to login using single sign on authentication.

ID	Description
73098	Organizational security now applied to the Organizational reports.
73179	Request Fulfillment page updated to prevent history from being written multiple times when requests are fulfilled.
73151	Right added control the deletion of system access records. Deleting system access records now captured in application history.
73395	Issue fixed where imports were not recording location changes when they were accomplished via an update import.
73448	Requests to post files to the Iron Mountain ftp site are now done in the same separate thread thus preventing deletion of files prior to them being posted.
73555	Issue addressed where Organizations that contain invalid characters if used in a file name will not cause an issue when generating invoices.
74106	Removed label that contained incorrect information on the Location Popup control. A location needs to be selected - a barcode cannot be entered in this control.
77821	Spelling fixed in application setting for Import and Report file extensions.
77922	Code updated to account for Event based changes to Records Schedules so that associated items are updated when Event is updated.
78033	Stale page Resource File Editor removed to prevent cross site scripting vulnerability.
79023	Simplify license features in UI.

4.6.3.10.3 General Availability

11/17/22

4.6.3.11 (Legacy Help) Release Notes 3.11

4.6.3.11.1 New Features

4.6.3.11.1.1 Legal Application Support

The configuration tool now fully supports the creation of a Legal application with default tabs for Client, Matter, Practice Codes, and Offices.

4.6.3.11.1.2 After Hour Record and Index Processing

Application setting added whereby full text tables can be upd ated and index maintenance applied in off hours.

4.6.3.11.1.3 Column Freezing for Home Page Grid

The first two columns in the home page grid are set to be "sticky" – allowing the user to scroll to the right and still select the record.

4.6.3.11.1.4 Event Based Retention Schedules

List management setting added that allows users to add month/day values for event codes.

4.6.3.11.1.5 Support for Large Digital Files

Cloud customers now have an application setting added for the ability to store temporary files in an alternate folder location. Adds support for uploading larger digital content files (>200-250MB).

4.6.3.11.2 Bug Fixes

ID	Description
60021	Fixed import log pagination issue.
63359	Log file now uses UTC time to store event date and is displayed correctly based on location of user.
65151	Resolved the clear row issue with Advanced Query
65029	Fixed issue with Export tool tip not showing correctly

4.6.3.11.3 General Availability

02/03/2022

4.6.3.12 (Legacy Help) Release Notes 3.10

4.6.3.12.1 New Features

4.6.3.12.1.1 Iron Mountain integration

Iron Mountain integration is now fully supported. Previously, the integration was custom work for each implementation. Gimmal Physical allows requests, transfer, and returns of boxes stored in Iron Mountain.

4.6.3.12.1.2 Laserfiche integration uses SDK 10

Gimmal Physical now supports version 10 of the Laserfiche SDK. Previously (the Infolinx releases) only supported version 9. In addition, the configuration page for Laserfiche was updated so that it is more intuitive and shared fields are displayed with the correct caption.

4.6.3.12.1.3 Permanent retention schedule

The ability to create schedules that are permanent, which prevents related items from getting a scheduled destruction date.

4.6.3.12.1.4 History presentation

The presentation of tab history was updated. A new column was added that details updated from and to column data in a more user-friendly fashion. History exports and reports now also respect any sorting that was performed on the page.

4.6.3.12.1.5 Space Management calculations on home or current location

A parameter has been added to application configuration page that allows space management to be calculated on either home or current location.

4.6.3.12.1.6 Command timeout

The database command timeout is now exposed on the application settings page.

4.6.3.12.1.7 Performance

- Reports are generated out of process in either a separate thread in IIS or in Hangfire.
- Improve search performance on the home page grid, global search, and quick search.

4.6.3.12.2 Bug Fixes

ID	Component	Description
56319	Web Application	System date fields are displayed correctly in the tooltip in the home page grid.
58521	Laserfiche	Shared multiline fields no longer cause an issue when creating linked records. Records can be declared in the root folder without issue.
58520	Web Application	Can no longer go to the undelete page for records that are not deleted.
N/A	Web Application	Logical parent labels will no longer be shown if the field is not visible.
57273	SSO	Username as a property in profile objects will no longer cause an error. Proper parsing of the value has been added.
54752	Web Application	Field search now correctly searches related parent fields.
55321	Web Application	User default values now used for resource entries, and no longer writing them to log.
53855	Web Application	Time display is now correct on import log page.
55736	Web Application	Hidden fields are no longer displayed in global search.
55954	Web Application	Non-numeric shelf size or capacity in space management are no longer allowed.
56899	Web Application	Undeleted option is no longer available for records not deleted.
54065	Web Application	Users are no longer able to create records on a record schedule if they don't have appropriate permissions.
56237	Web Application	Button color has been corrected on drop zone for digital content management.
59347	Web Application	Fixed issue where the Last Modified Date of a Box gets set to the exact Date/Time of the Disposition Approval action if a singular Update is used but does not get set correctly during a Bulk update on the Disposition Approval.
59348	Web Application	Update modify date when multi-select value is changed.

ID	Component	Description
54702	Rest Services	Resolved SSO not working due to time zone differences.
54715	Web Application	Resolved the wrong time displayed for hover text for datetime fields.

4.6.3.12.3 Known Issues

ID	Description
64971	Reports cannot be run from the dashboard. Workaround is to run reports from the reports page instead of the dashboard.
65151	Advanced Query Clear Row button does not clear the selected row.

4.6.3.12.4 General Availability

10/20/2021

4.6.3.13 (Legacy Help) Release Notes 3.09

4.6.3.13.1 User Interface Updates

The web application has been rebranded to reflect Gimmal color palette and logos.

4.6.3.13.2 New Features

4.6.3.13.2.1 Conditional Field Display

Altered logic so that all fields governed by conditional list values are hidden until a value is selected from the list driving conditional field display.

4.6.3.13.2.2 Intelligent barcode field

Added ability to add pre or post filled auto/manual barcode fields to tab that will respect display order.

4.6.3.13.3 Known Issues

ID	Component	Description
55321	Web Application	User default values for missing resource entries.
54752	Web Application	Keyword search will work as “Wildcard Behavior” by default when doing keyword searches.
54702	REST Services	SSO not working due to time zone differences. Additional parameter is required.
54751	Web Application	Hover text for datetime fields is not using correct offset causing wrong time to be displayed.
53855	Web Application	Time display is incorrect on Import log page.
55736	Web Application	Hidden field are displayed when doing a global search.
55954	Web Application	Non-numeric shelf size or capacity in space management should not be allowed.
56899	Web Application	Records that are not deleted still show undelete option on menus.
54065	Web Application	Large list control may still allow CRUD operations when user is view only.
57273	Web Application	SSO will generate error when “username” is passed into the username parameter.

4.6.3.13.4 General Availability

4/13/2021