



Quick Start Guide – File Room User

Gimmel Physical

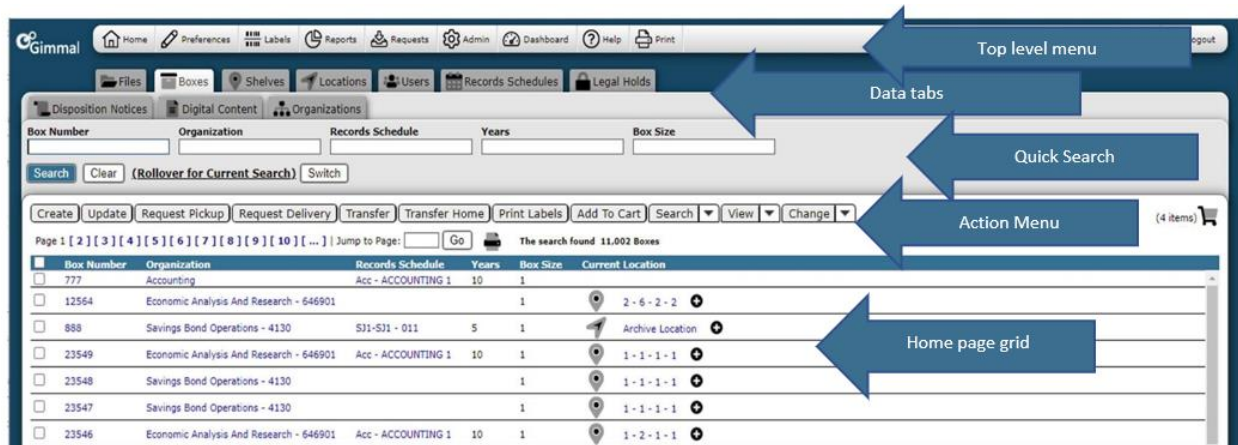
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Version History

Version	Approved By	Effective Date	Product Version	Description of Change
1	Alex Caldas	11/10/2020	3.8	Created for Gimmel Version 3.8
2	Will Irwin	03/02/2022	3.11	Created for Gimmel Physical v3.11
3	Terry Butler	03/01/2022	3.11	Updated screen shots and format
4	Marta Farensbach	12/1/2022	3.12	Minor updates for Gimmel Physical 3.12

Quick Start Guide



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

File Room User Tasks

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.