

Quick Start Guide – File Room User

Gimmel Physical

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Version History

Version	Approved By	Effective Date	Description of Change
3.8	Alex Caldas	11/10/2020	Created for Gimmel Version 3.8
3.11	Will Irwin	10/11/2021	Created for Gimmel Physical v3.11
3.11	Terry Butler	03/02/2022	Updated screen shots and format

Quick Start Guide

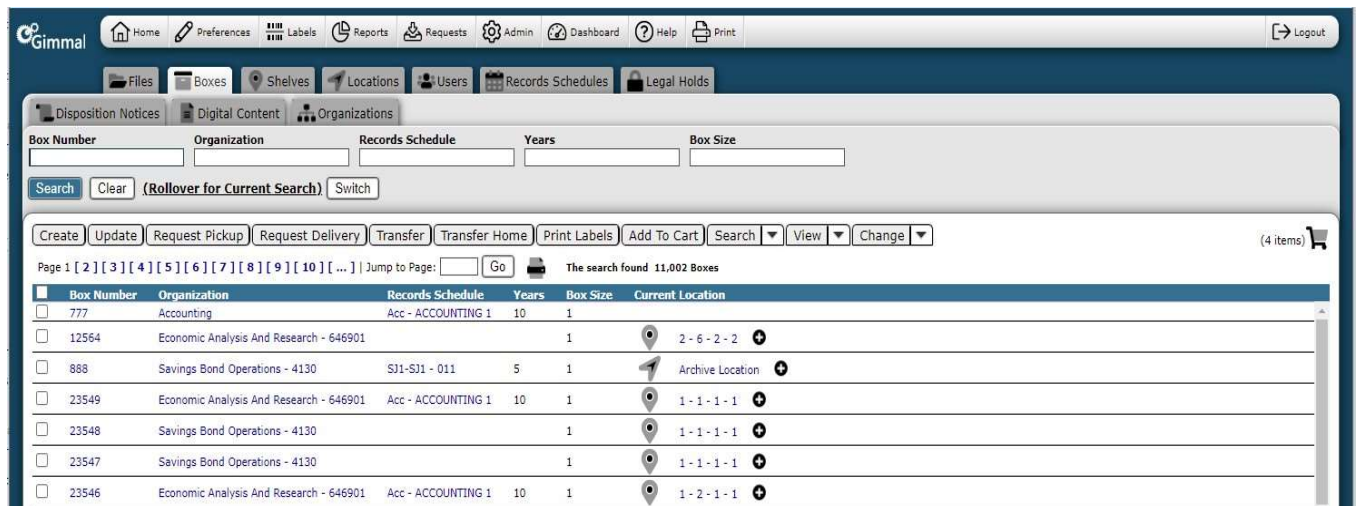
Top Level Menu – provides access to the various indicated functions

Data Tabs – used to access the various items being tracked

Quick Search – used to query within tabs

Action Menu – provides access to listed actions

Home Page Grid – displays queried results



The screenshot displays the Gimmel application interface. At the top, there is a navigation bar with icons for Home, Preferences, Labels, Reports, Requests, Admin, Dashboard, Help, and Print. Below this is a secondary menu with icons for Files, Boxes, Shelves, Locations, Users, Records Schedules, and Legal Holds. The main content area features a search interface with fields for Box Number, Organization, Records Schedule, Years, and Box Size. Below the search fields are buttons for Search, Clear, and Rollover for Current Search. A row of action buttons includes Create, Update, Request Pickup, Request Delivery, Transfer, Transfer Home, Print Labels, Add To Cart, Search, View, and Change. A pagination bar shows 'Page 1' with links for pages 2 through 10, and a 'Go' button. A status message indicates 'The search found 11,002 Boxes'. The main data grid has the following columns: Box Number, Organization, Records Schedule, Years, Box Size, and Current Location. The grid contains several rows of data, including items with Box Numbers 777, 12564, 888, 23549, 23548, 23547, and 23546.

Box Number	Organization	Records Schedule	Years	Box Size	Current Location
777	Accounting	Acc - ACCOUNTING 1	10	1	
12564	Economic Analysis And Research - 646901		1	1	2 - 6 - 2 - 2
888	Savings Bond Operations - 4130	SJ1-SJ1 - 011	5	1	Archive Location
23549	Economic Analysis And Research - 646901	Acc - ACCOUNTING 1	10	1	1 - 1 - 1 - 1
23548	Savings Bond Operations - 4130		1	1	1 - 1 - 1 - 1
23547	Savings Bond Operations - 4130		1	1	1 - 1 - 1 - 1
23546	Economic Analysis And Research - 646901	Acc - ACCOUNTING 1	10	1	1 - 2 - 1 - 1

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.